Oracle® Education

Oracle® Guided Learning User Guide

Release 25D
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ORACLE

Oracle Education Oracle® Guided Learning User Guide, Release 25D

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Preface

This preface describes the document accessibility features and conventions used in Oracle Guided Learning.

Purpose Statement

This document provides a user guide to features and enhancements included in Oracle Guided Learning up to release 25D. It is intended solely to catalog the available OGL Console features up to release 25D and instruct you on their use. Screenshots and step-by-step instructions are included for reference only and may differ slightly from your application due to continuous product updates.

Documentation Accessibility

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Introduction & Overview of Oracle Guided Learning

> **Note**
>
> Oracle acquired Iridize in 2018, and the rebranding process is in progress. Iridize has been renamed to **Oracle Guided Learning**, referred to herein as **OGL**. You might come across the term "Iridize" in this document and in the application until the rebranding is complete.

Oracle Guided Learning is an Enterprise cloud platform that supports the creation of personalized, guided, and contextual user onboarding visualizations - to simplify and accelerate your adoption of web-based applications. OGL is an information and learning interface embedded in a host application. With OGL, you can create in-application guidance to simplify and accelerate your adoption of any web-based application.

OGL offers the following features:

- **Process Guides:** Visually walk users through a process, providing step-by-step guidance, to help through a task. For example, you could guide users through the process of submitting an expense form and enforce that the correct fields are filled out as they complete the process.
- **Display Groups:** Organize and present your content in the OGL widget by taking advantage of display groups, you can group content by module/process area or any other suitable category.
- **Message Guides:** Broadcast messages announcing new features and functions, welcome new users and inform them about upcoming events. You can configure Message Guides to appear automatically, to specific users, and for a given duration. For example, a Message Guide could tell users about a new application and provide a video that they can watch to learn more.
- **Smart Tips:** Provide context-sensitive help, hover text, or supplemental information to form fields, buttons, labels, and other UI elements.
- **Task Lists:** Group your process guides together into clear task lists that inform users in what order they need to complete processes. For example, onboarding new users - including getting started, forms required to be submitted, benefit elections, etc.
- **Launchers:** Automatically launch OGL items based on where users are in the application and what screen element they interact with. For example, you can launch a process guide or message whenever a user creates a purchase requisition. This can be to inform the user of policy changes, approval limit changes, or compliance actions.
- **Hotspots:** Gain valuable insight into how users are navigating the application, through OGL analytics, Hotspots can highlight high-activity areas of the application.
- **Analytics:** Allows clients to filter and report on OGL metric information. For example, to report on the usage and consumption of the OGL content and other linked content hosted by the client.

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- **Miscellaneous:** Oracle Guided Learning also supports the creation of product tours, rich media guides, beacons, invisible Smart Tips, Survey guides, and adding images and links to additional training content.

Browser Compatibility

Oracle aims to leverage modern web standards to deliver an exceptional customer experience. Use only **Google Chrome** if you are a **Content Developer**, as it is the only browser that supports OGL content development. However, end-users and viewers can use any modern, supported browser like **Google Chrome**, **Mozilla Firefox**, **Microsoft Edge**, or **Apple Safari** to run the **Fusion** Applications UI.

> **Important**
>
> Google Chrome is the only browser supporting OGL content development with browser's zoom setting at 100%.

The below table documents the compatible browsers for Oracle Guided Learning users:

Browser Version	End-User	Analytics (Viewer)	Content Developer
Google Chrome 80+	√	√	√
Apple Safari 13+	√	√	X
Microsoft Edge 80+	√	√	√
Mozilla Firefox 68+	√	√	X

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2

Getting Started

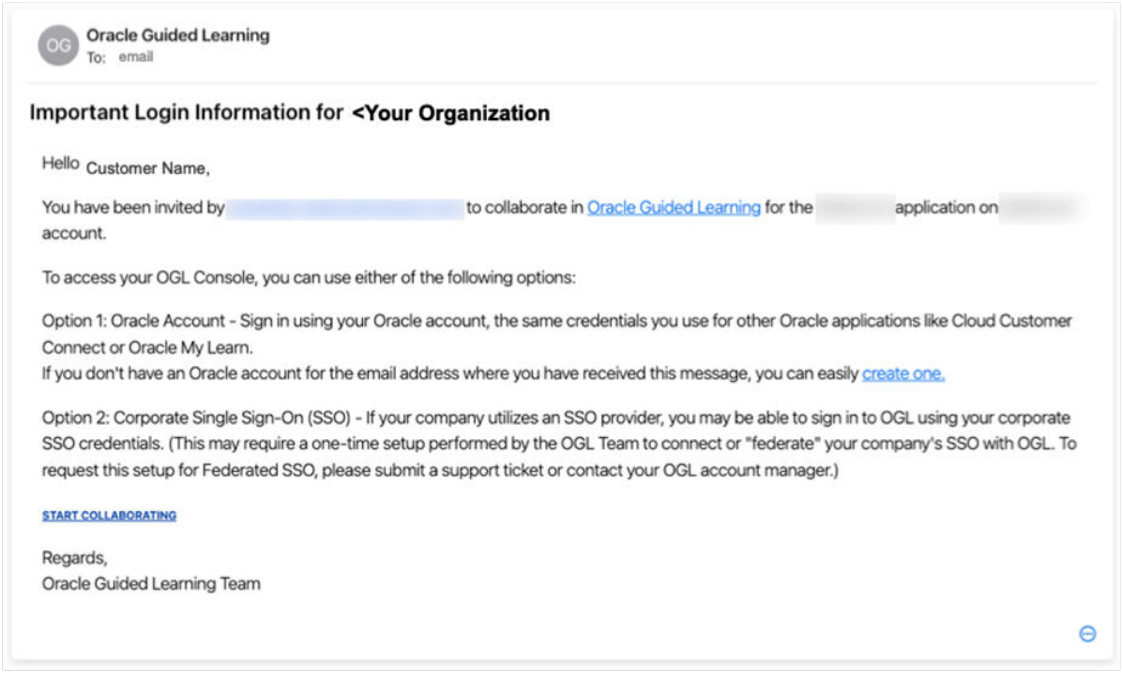
OGL Account Setup

As a customer, you can contact your Oracle Account Manager to request an OGL account. Once your order is processed, Oracle will provision your OGL account, and a **Welcome to Oracle Guided Learning** email will be sent to the admin/buyer in the order with instructions on how to sign in to OGL and register for a webinar to help your get started with using OGL. You can contact Oracle Support if there is any issue with the account or if you do not receive the provisioning email.

Confirmation Email

Once your OGL account is created, you will receive an invitation email that contains the link to access the OGL console along with instructions on how to sign in using an Oracle Account or your company's Federated Single Sign-On (SSO). Follow the instructions provided in the email to access the OGL console.

Below is an example of the confirmation email:



Sign In to OGL

Important Note

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Beginning in **OGL 24A Release**, OGL console users must sign in using a Single Sign-On (SSO) provider to authenticate. This means that you must either sign in using an **Oracle Account** or your company's **Federated Single Sign-On (SSO)***.

If you do not have an **Oracle Account**, you can easily create one. This is the same account that you use to access to other Oracle services, such as Cloud Customer Connect, My Oracle Support, and My Learn. With your **Oracle Account,** you can conveniently access OGL along with other Oracle services using a single username and password. When creating your **Oracle Account**, be sure to use the same email address that is associated with your OGL account.

***Federated Single Sign-On (SSO)**: If you wish to sign in to OGL using your company's Single Sign-On (SSO) provider, you may need to request a one-time configuration to be performed by the OGL Product Team to integrate your company's SSO with OGL. Once configured, you will be able to sign in to OGL using your company's SSO. To request SSO integration with OGL, please contact your Oracle Account Manager or log an OGL support ticket.

Once you have successfully setup your Oracle Account or enabled your company's SSO with OGL, you can access OGL by selecting the **START COLLABORATING** link located at the bottom of the confirmaltion email.

You will be directed to the OGL Sign-In screen as shown below. (We recommend that you bookmark this URL for future use.)

Sign in using one of the following options:

Option 1:

Select **Sign in with Oracle Account**to be directed to the Oracle Account sign-in page and enter your login credentials.

OR

Option 2:

To sign in using your company's SSO (if configured), enter your company name and select **Sign in with your SSO provider** to be directed to your company's SSO page.

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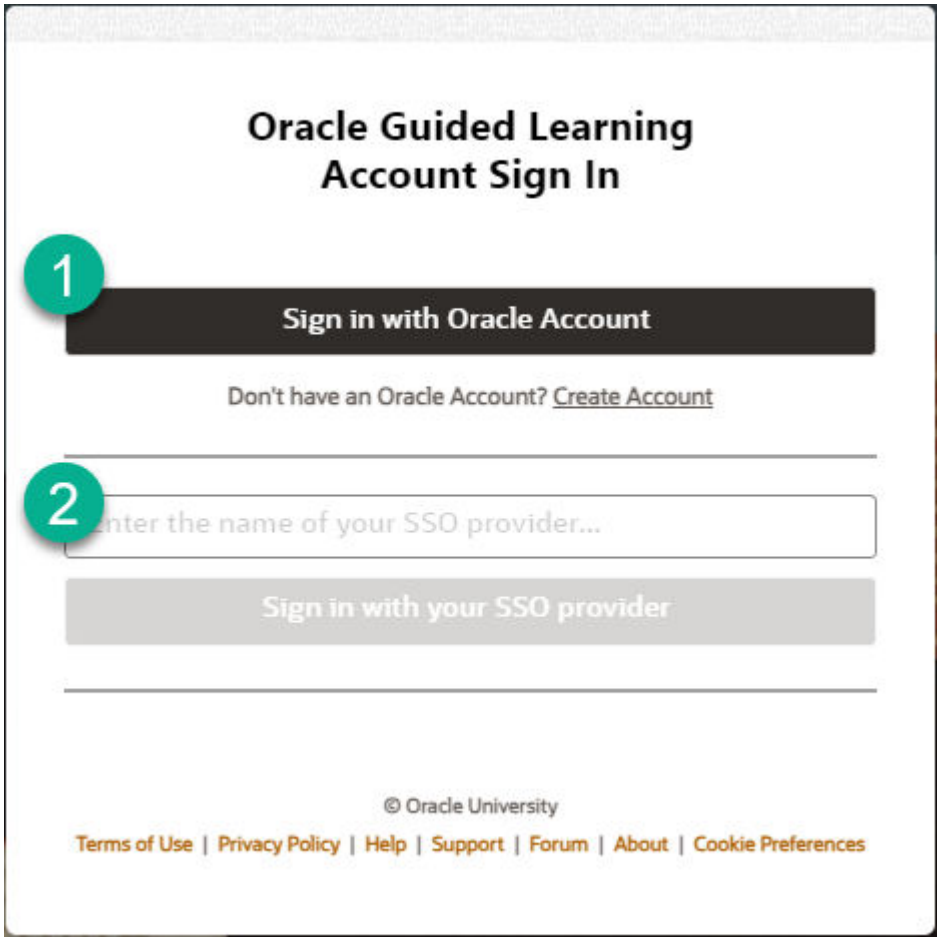

Once you have successfully signed in, yu will be redirected to the OGL Console.

Accessing OGL for the First Time

The OGL Console is a web application used to manage your content library. When you access the OGL Console for the first time, you are prompted to install the Chrome extension required to develop content.

Google Chrome and Microsoft Edge are required for content creation in the OGL Console. Before proceeding, verify your organization's OGL tenancy by referring to the OGL Welcome email received during provisioning or logging a request on My Oracle Support.

Installing the OGL editor extension for Google Chrome

Prerequisites:

- Google Chrome browser

Instructions:

1. Go to the **Chrome Web Store**. The page below opens; select **Add to Chrome**.

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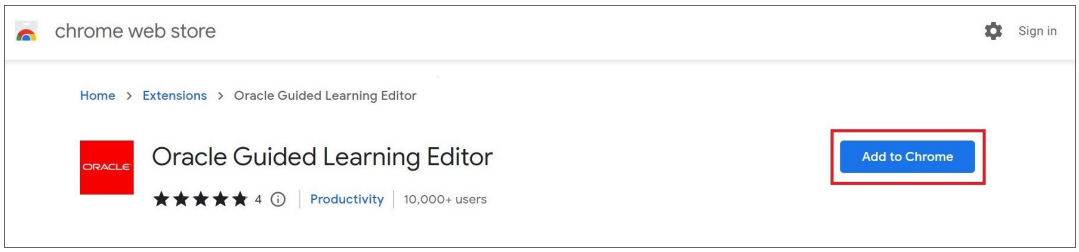
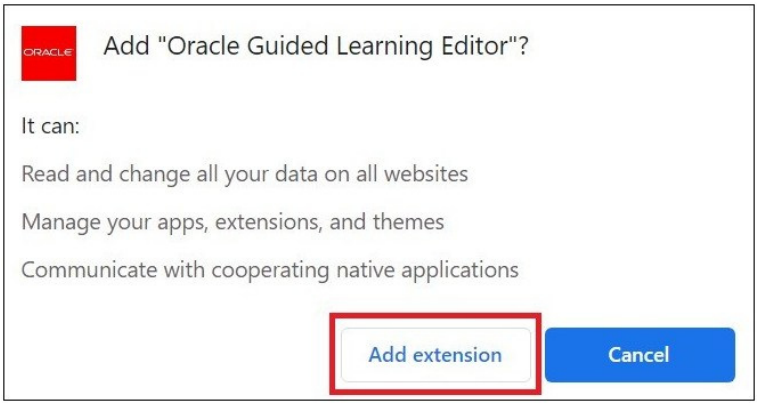
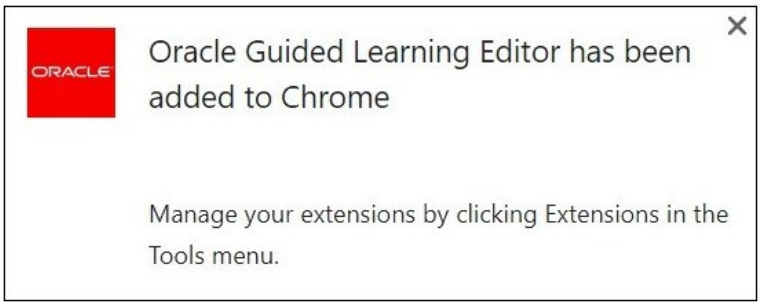


2. Select **Add extension**.



3. A confirmation message is displayed once the setup has been completed. You can now visit the OGL Console to start collaborating.



Accessing the OGL Console on Google Chrome

To access the OGL Console:

1. Go to the OGL console via the unique tenancy designated to you.
   - NA Tenancy
   - EMEA Tenancy
   - APAC Tenancy
2. On the Sign-in screen, type the username and password.

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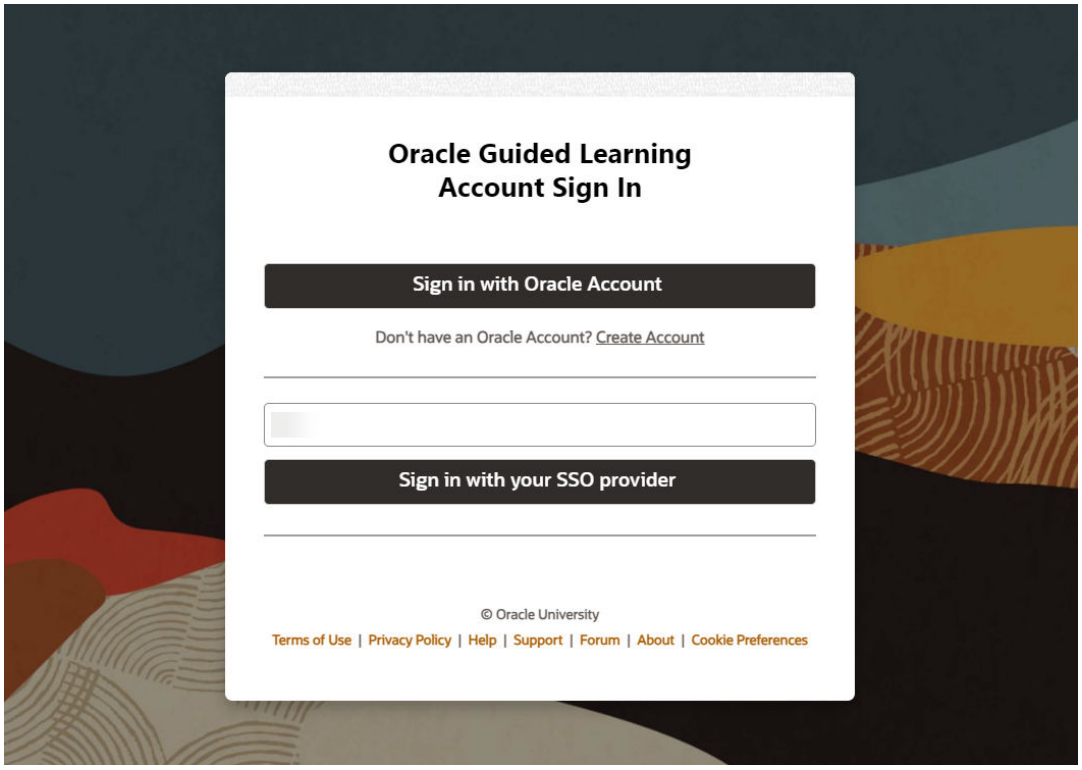

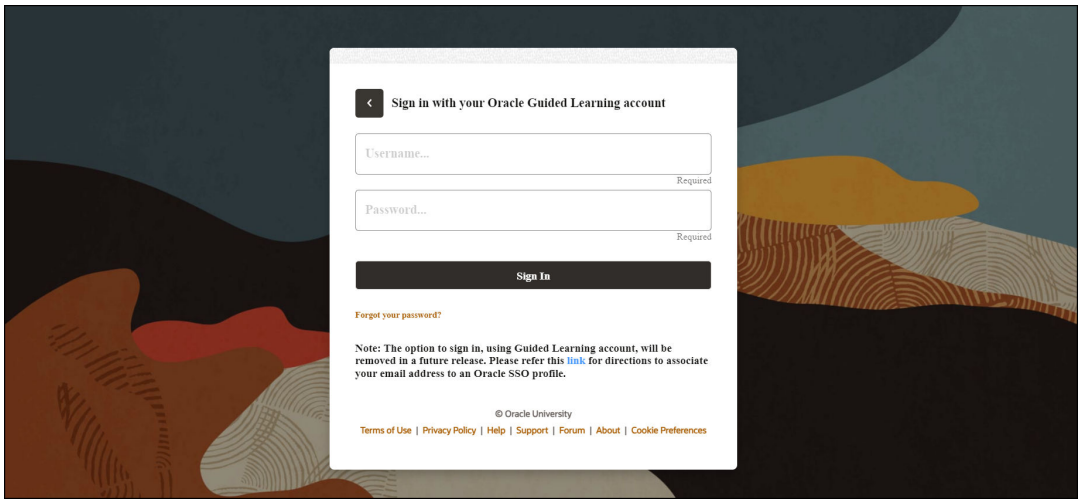

3. Select **Sign In**.
After a successful login, you will be redirected to the OGL console's Homepage.

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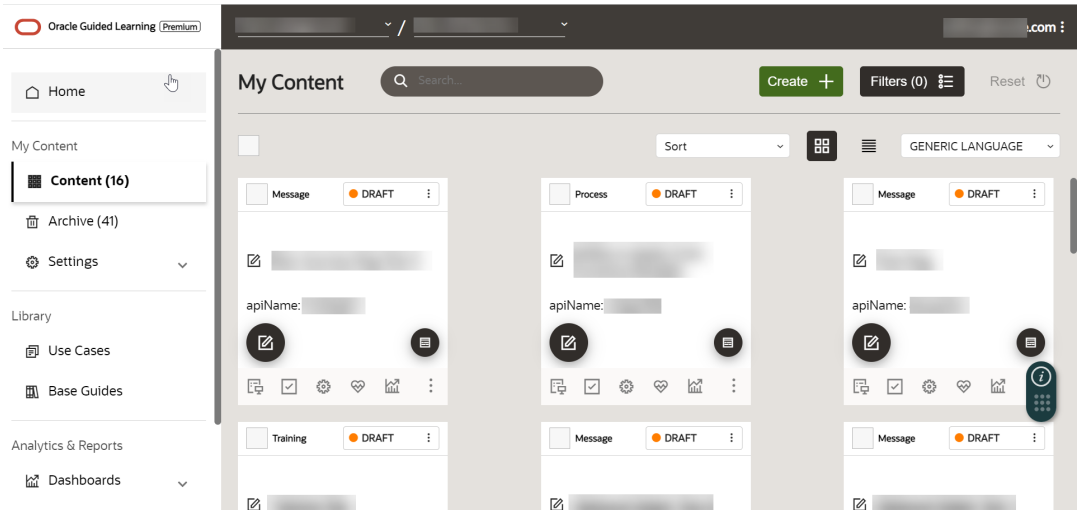
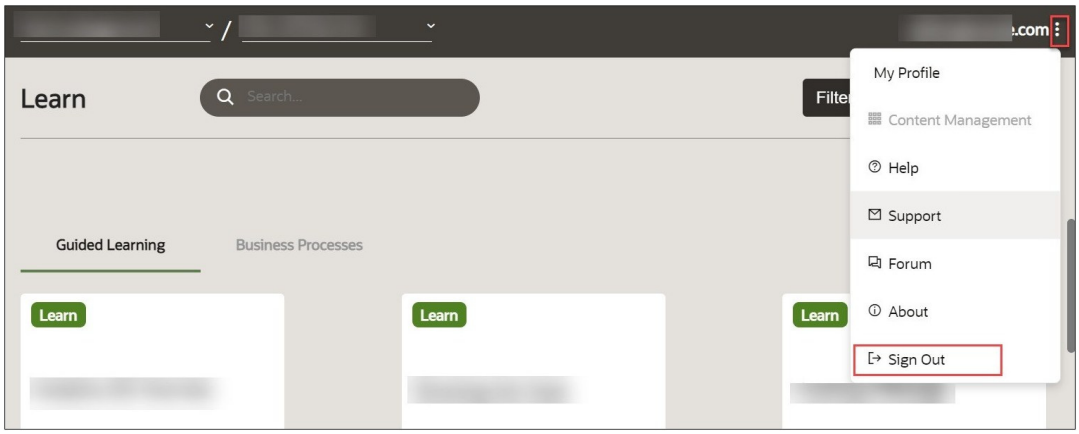


Important

- CAPTCHA verification will be required after two (2) failed attempts.
- The account will be locked after three (3) failed attempts.

To log out of OGL Console:

1. On the OGL console, in the right corner of the header, select the **Ellipsis** icon (⋮) right after the user email ID. Then select **Sign Out**.



You are now logged out of the OGL Console.

OGL Editor Extension for Microsoft Edge

Beginning in OGL 25B Release, the OGL Full Editor extension is now compatible with Microsoft Edge browsers. Content developers can now use Microsoft Edge in addition to Google Chrome for guide development activities. Note: Applies only to the OGL Full Editor Extension and not the Runtime Player extension.

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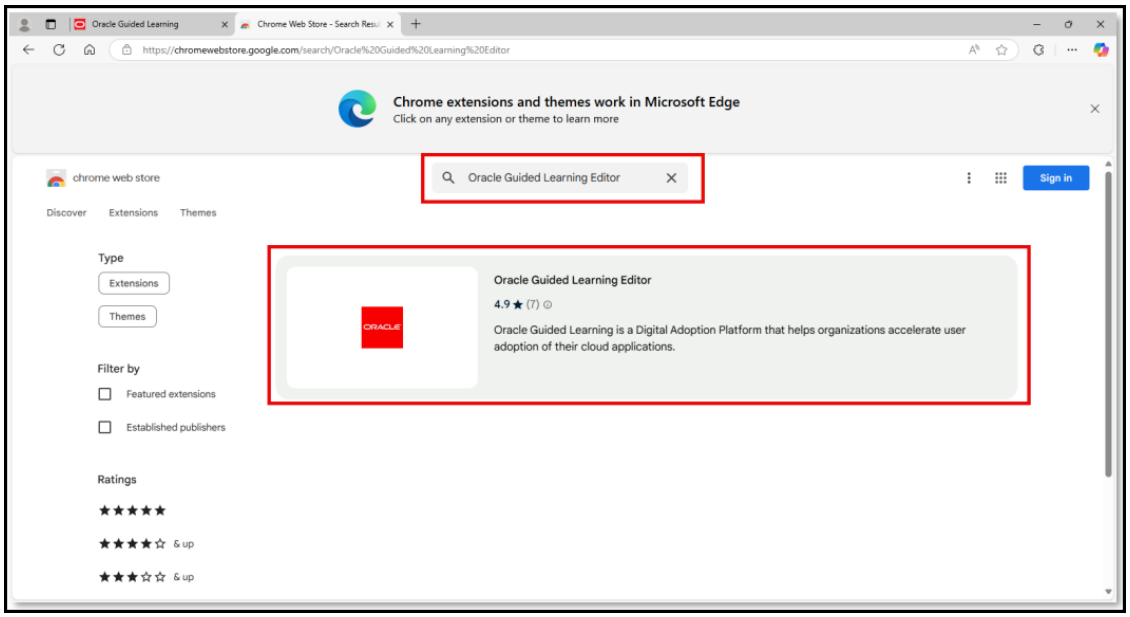
Installing the OGL Editor Extension for Microsoft Edge

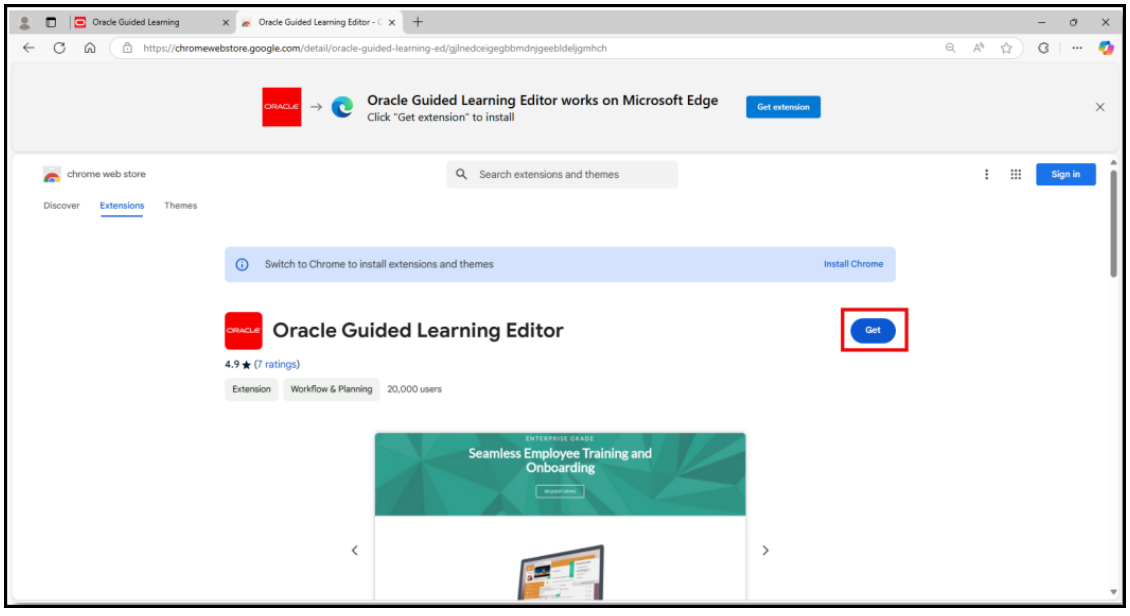
- Microsoft Edge uses the same OGL Editor extension as Google Chrome.
- To download and install the OGL Editor extension, users can access Google Chrome Store (https://chromewebstore.google.com/) from their Edge browser and search for the OGL Editor extension there.
- Users can then install the extension from Google Chrome store exactly as they would for the Google Chrome browser.

From your Microsoft Edge Browser, go to: https://chromewebstore.google.com/

1. In the **Search extensions and themes** (Search extensions and themes) field type in “Oracle Guided Learning Editor” and select it from the list.



2. Select the **Get** button.



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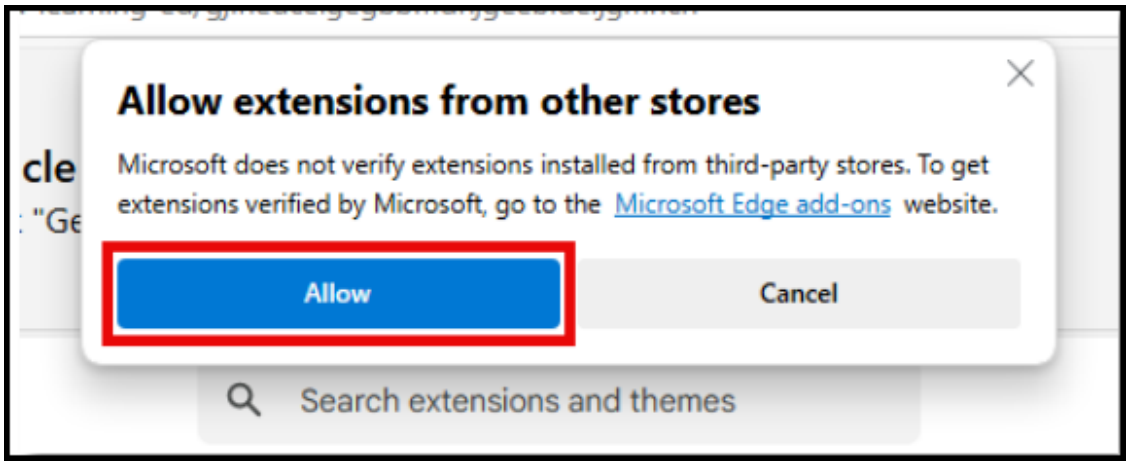
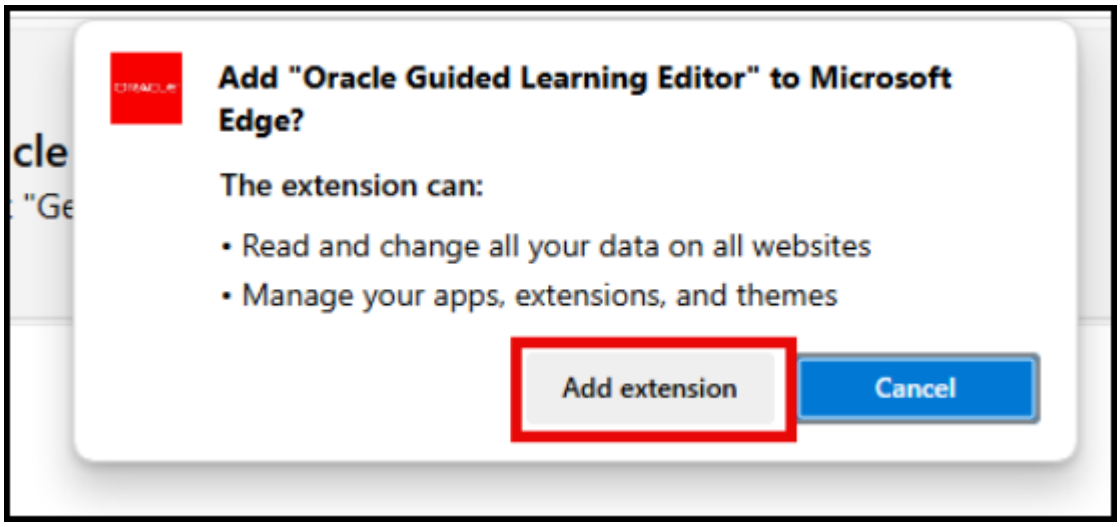
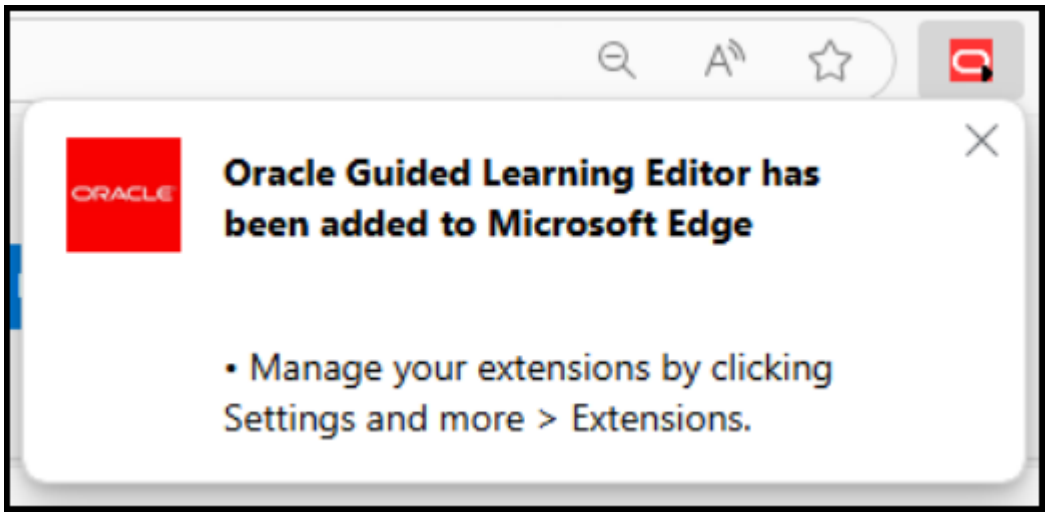
3. In the Allow extensions from other stores popup menu, select **Allow**.



4. Select the **Add extension** button.



A confirmation message will appear once the Oracle Guided Learning Editor extension has been added.



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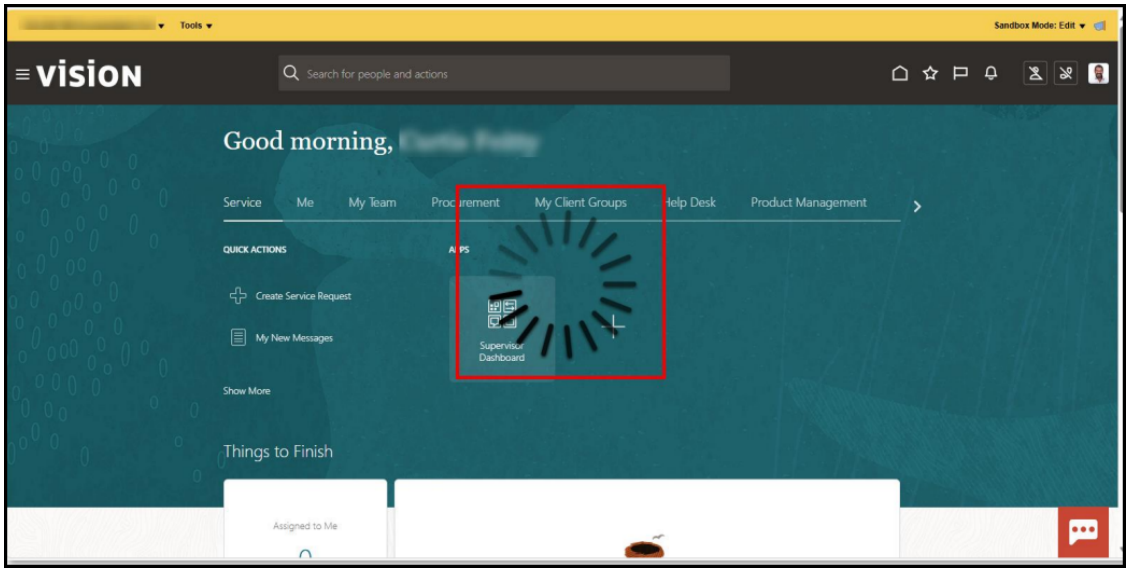
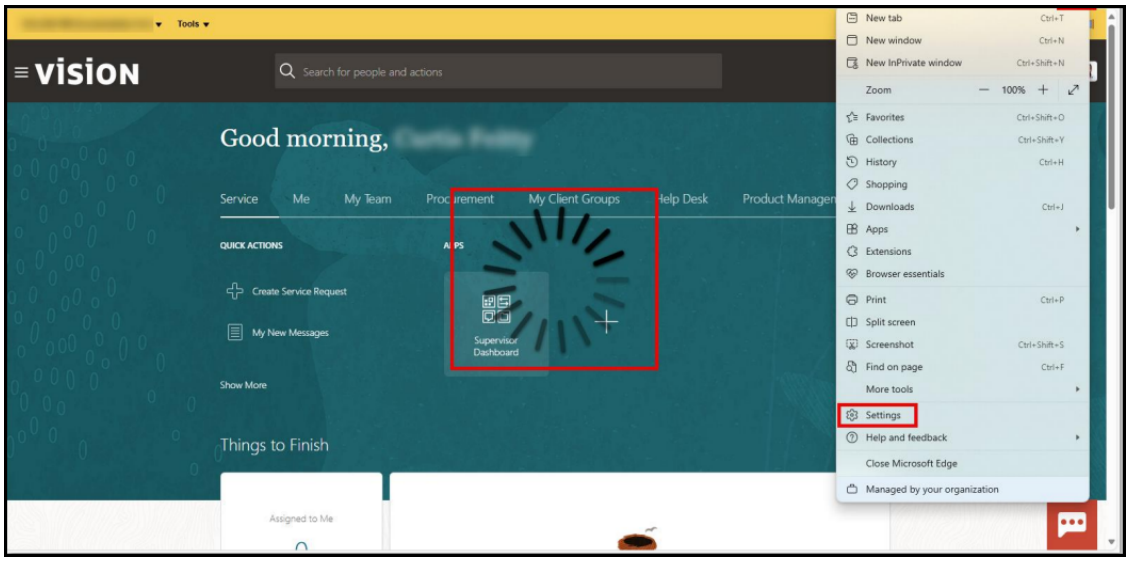
You can now sign in to Oracle Guided Learning and begin developing OGL content.

Adjust Tracking Prevention Settings
In some cases, the OGL Editor extension may not load due to Microsoft Edge's Tracking Prevention settings, which are designed to detect and block potentially harmful trackers found on some websites. In this case, the editor will attempt to load and will idle with a spinning wheel, as shown below:



To adjust the Tracking Prevention settings, select the Settings and more (•••) button to the right of the address bar, then select Settings from the menu.

> **Note**
>
> You may need to consult with your IT Department or Network Administrator prior to adjusting these settings.



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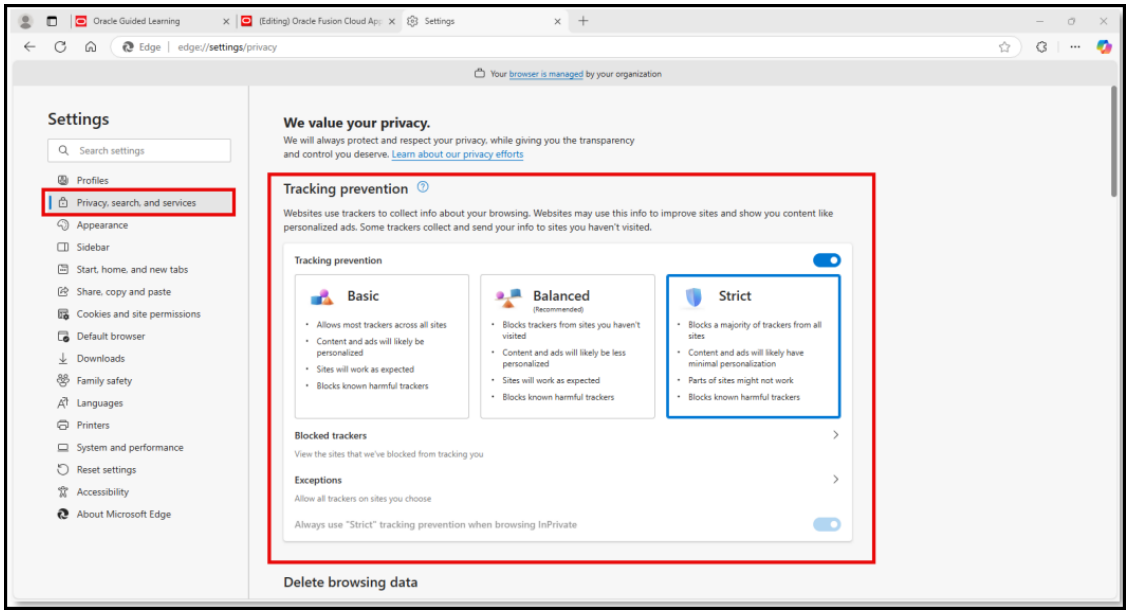
In the **Settings** left panel, select **Privacy, search, and services**, then look for the **Tracking Prevention** section and note the current setting (Basic, Balanced, or Strict).

> **Note**
>
> Select the icon next to **Tracking Prevention** to learn more about how Microsoft Edge handles trackers.



There are 3 **Tracking Prevention** modes:

Basic: Blocks potentially harmful trackers but allows most other trackers and those that personalize content and ads.

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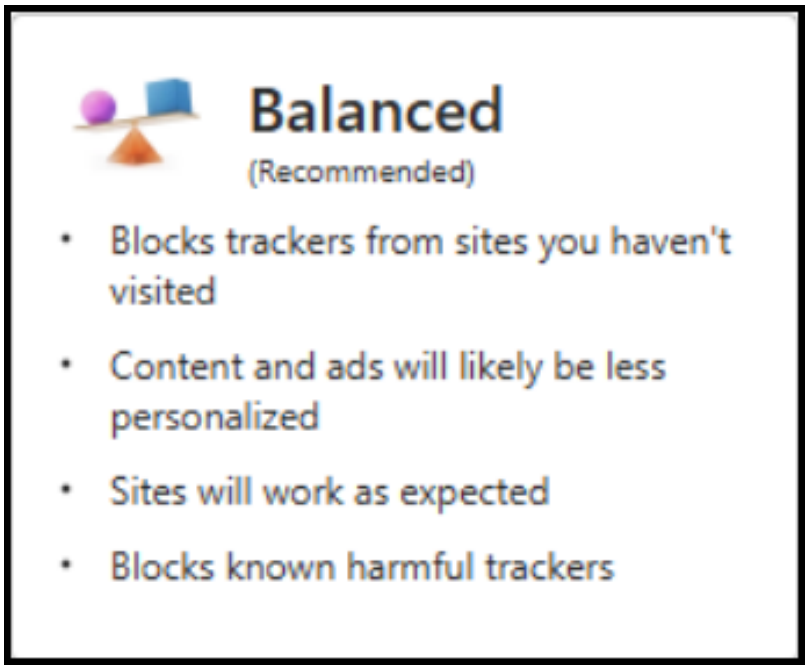
Balanced (Recommended): Blocks potentially harmful trackers and trackers from sites you haven't visited. Content and ads will likely be less personalized. This mode will allow the OGL Editor to run on most sites and will allow you to develop OGL content on most HTML pages.



Strict: Blocks potentially harmful trackers and most trackers across sites. Content and ads will likely have minimal personalization. This option blocks the most trackers but could cause some websites to not behave as expected. For example, a video might not play, or you might not be able to sign in.

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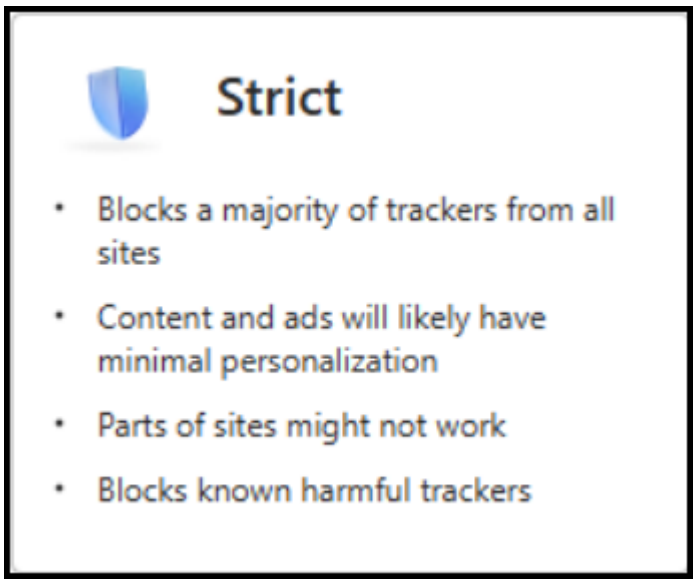
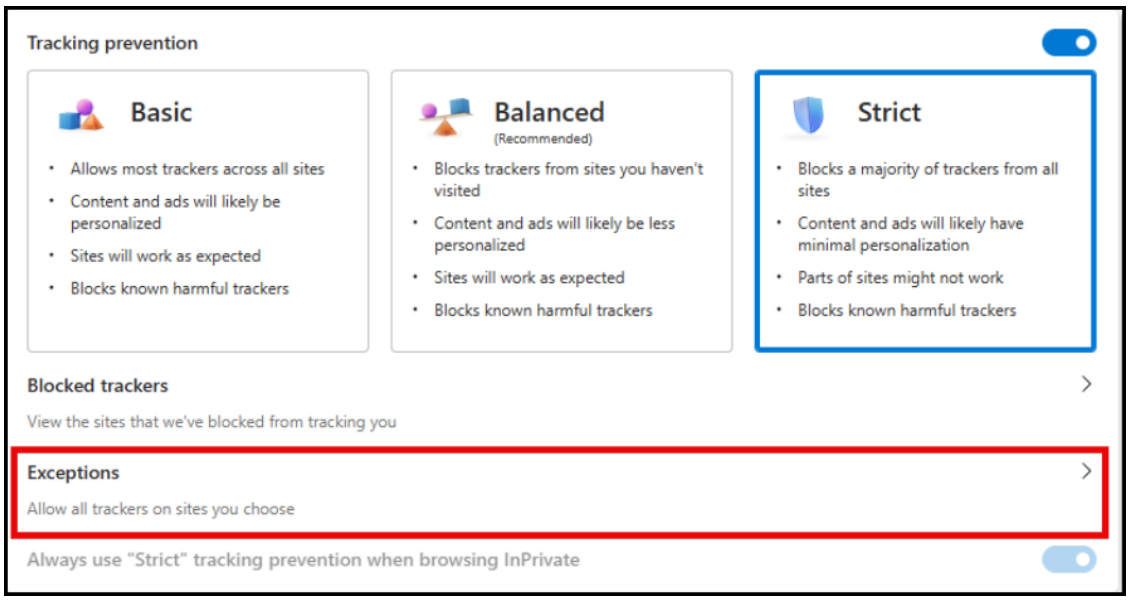
> **Note**
>
> This mode may require you to add URLs to an **Exceptions** list for websites on which you intend to develop OGL content. See below for details about managing the Exceptions list.



Exceptions List for Tracking Prevention in Strict Mode
If you choose **Strict** mode, select **Exceptions** in the Tracking prevention section.



Select the **Add a site** button to add a site to the Exceptions list.

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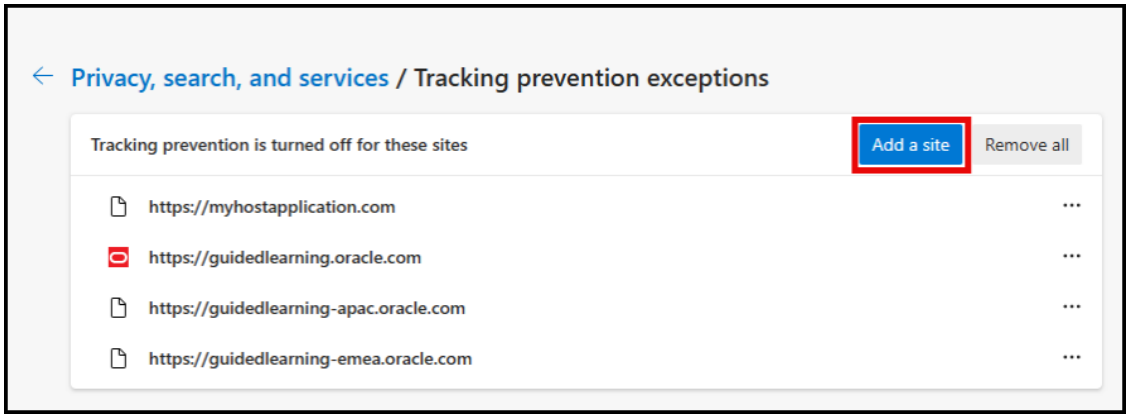

Enter the URL of the site for which you intend to develop OGL content, then select **Add**.

Once the site is added to the Exceptions lists, you will be able to be able to load the OGL Editor from that site.

Oracle Guided Learning SSO Integration

Oracle Guided Learning offers the flexibility of using your organization's SSO to authenticate your OGL Console session. Users still have the option to sign in manually with their OGL Console username and password. If you are interested in SSO, ask your Oracle Guided Learning contact for more information or log a request on My Oracle Support.

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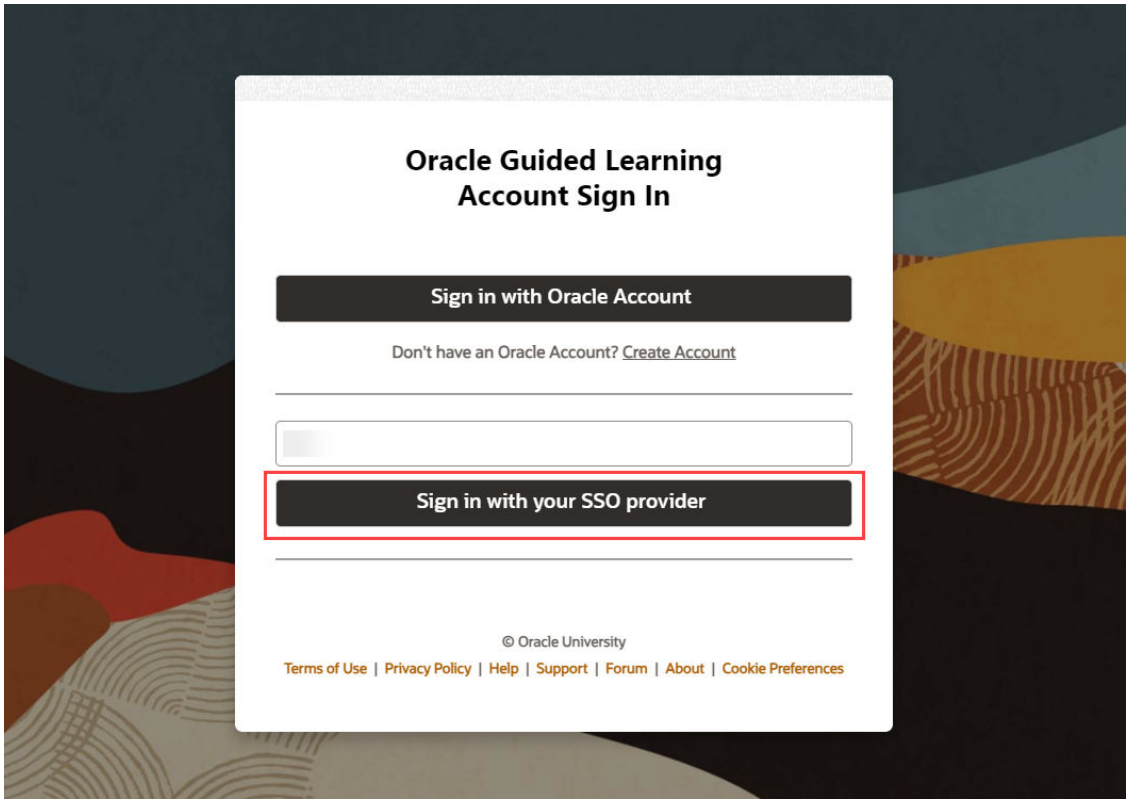

With OGL 23C release, you may need to transition your OGL sign-in process to Single Sign On (SSO) if you have not already done so. Making this transition is easy and will help ensure the highest level of security and privacy of your data. Please read the following information to understand your part in this security enhancement.

Why the change?

To better ensure the security of your data, in alignment with the latest security standards and practices, Oracle Guided Learning is moving to an SSO-only sign-in experience. For OGL users, this means a more simplified and secure sign-in process to access the OGL console.

What is your part in the change?

With 23C release, there are three options to sign in to OGL:

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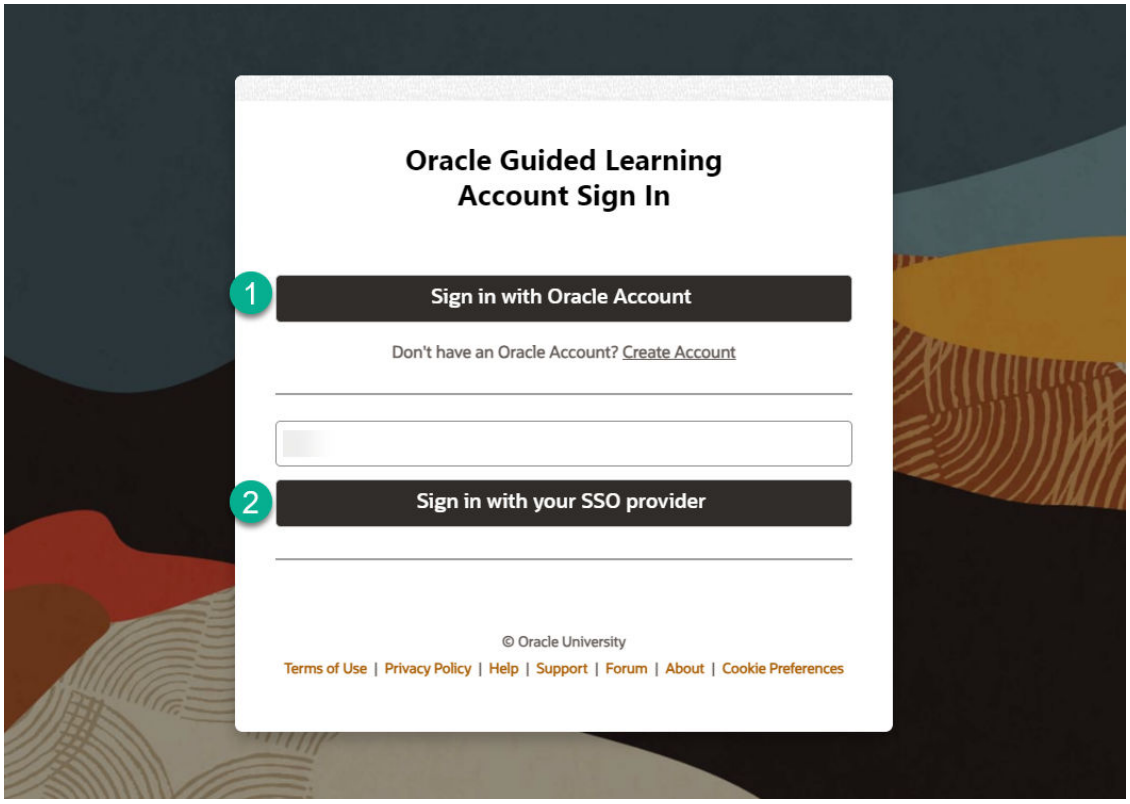

1. **Sign in with an Oracle Account**
   This is a new option in Release 23C. If you already have an Oracle Account that you are using to access Oracle services such as Customer Connect Forums, Events, and online training via MyLearn, you will now be able to use that same account to sign-in to OGL with no additional setup required. If you don't currently have an Oracle Account, you can easily create one. An Oracle account is easy to set up and is governed by Oracle's advanced data security policies.

2. **Sign in using your organization's Federated Single Sign On (SSO)**
   If you are interested in integrating your organization's SSO with OGL, please contact your network administrator and raise an OGL support ticket to request "SSO integration". One of our experts will work with your organization's network administrator to guide the implementation process.

What is the benefit of adopting SSO?

By shifting to an SSO process, your access to Oracle applications and support functions will be simplified and consolidated into one login and password. There will be no impact to your current user management roles and/or entitlement process for new developers, editors and owners.

For more information:

Further information is available in this document. If you have additional questions, please engage with your OGL point-of-contact.

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Deploying Oracle Guided Learning for Oracle Cloud Fusion

Overview of the Oracle Guided Learning Integration

Oracle Guided Learning (“OGL”) works as an overlay to your Oracle Cloud Fusion (“Fusion”) environments that understands user behavior in the application and presents the content relevant to their page location and user role.

In this chapter, we will cover the steps required to deploy guided learning, including:

- Setting up your Oracle Guided Learning (OGL) account so that it gets connected with your Oracle Cloud Fusion environment(s) and then,
- Configure your Oracle Cloud Fusion environment(s) to display the desired content from your OGL account.

Pre-requisites for Deployment

Before you start configuring the OGL Domain Settings, you must meet the following pre-requisites:

- **OGL Console Permission: Owner > Manage Cloud Configuration**
- **Fusion Environment Access: Application Administrator/Implementer**
- **Fusion Administrator Profile Value: Guided Learning Enabled**

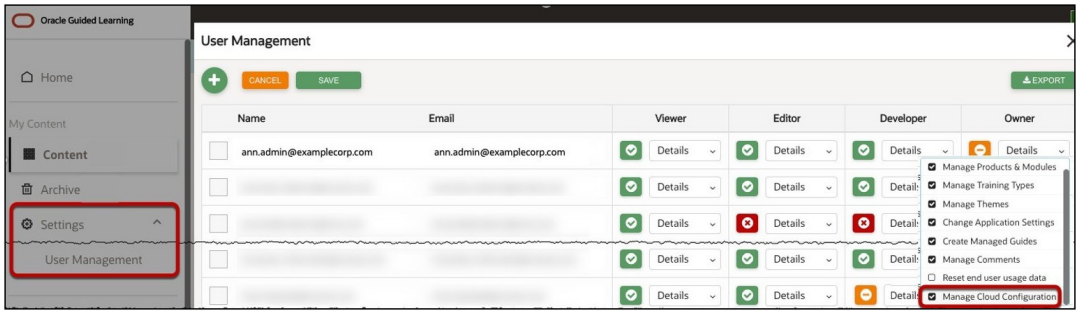
Additional details and procedures for each of these pre-requisites are provided below.

OGL Console Permission: Owner > Manage Cloud Configuration

To access the OGL Cloud Configuration, you must have the owner permission "**Manage Cloud Configuration**" to edit and manage Cloud Configurations in OGL.

To enable "Manage Cloud Configuration" owner permission:

1. On the OGL console, go to **Settings>User Management**.
2. Among the list of users, find your name and email ID.
3. Select the **Details** dropdown menu under the **Owner**'s column on the line that displays your name or email ID.
4. Select "**Manage Cloud Configuration**" from the dropdown options.



The "**Manage Cloud Configuration**" owner permission is now enabled for your account.

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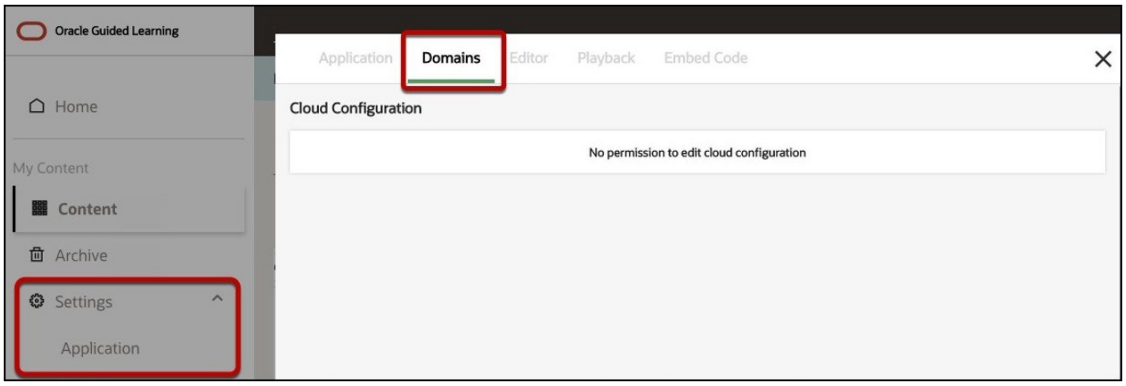
> **Note**
>
> If you see the below message when accessing the **OGL Settings>Application>Domains** tab, ask your OGL administrator to update your user permissions to enable **Manage Cloud Configuration.**



Fusion Environment Access: Application Administrator/Implementer

To enable OGL on Oracle Fusion Application(s) and to set the OGL Fusion profile value, you should log in to the Oracle Fusion application as a user with the Oracle Fusion Application Administrator/Implementor role. Specifically, you are required to:

- Create and publish an Oracle Fusion **Sandbox**; and,
- Access and update the **Configure Guided Learning** task page within **Setup and Maintenance**.

> **Note**
>
> If you do not have access to perform these actions, please contact your **Oracle Fusion Administrator**.

Fusion Administrator Profile Values for Guided Learning

For OGL to be applied to an Oracle Fusion Domain, the best practice is to check the Oracle Fusion Applications Administrator profile value for **Guided Learning Enabled** (FND_GUIDED_LEARNING_ENABLED) is set to **Yes** at the site level.

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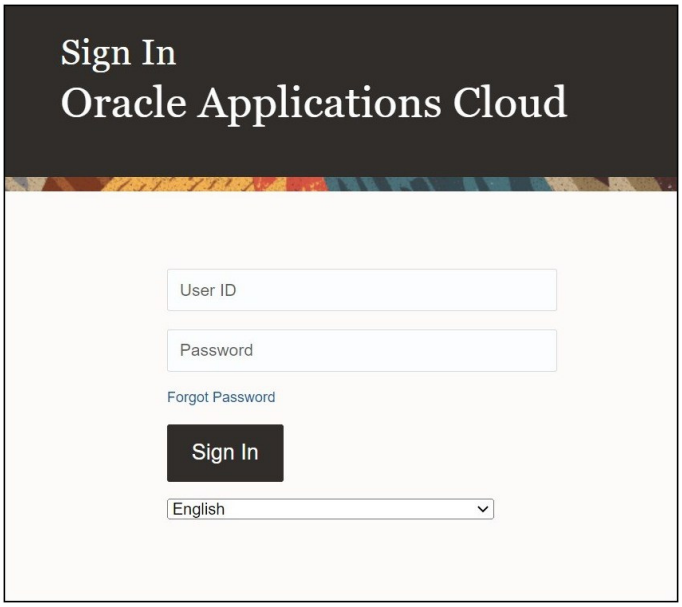
To enable the OGL profile value:

1. Sign in to your **Fusion** instance.



2. Select the **Settings and Actions** icon ( ) at the top-right corner of your **Fusion** homepage, then select **Setup and Maintenance** from the options in the dropdown list.

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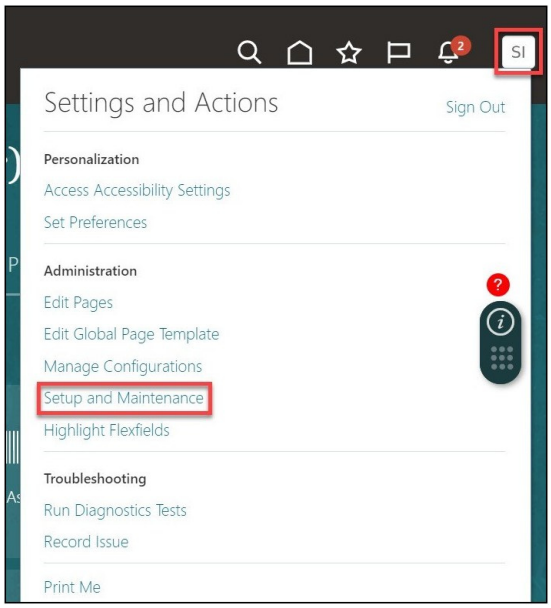
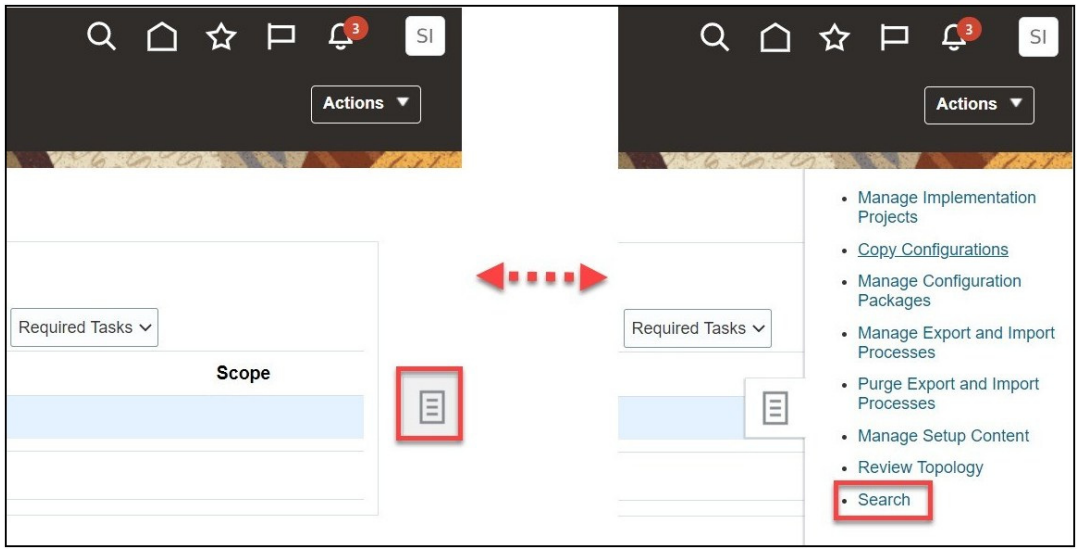


3. Select the **Tasks** icon ( ) on the **Setup and Maintenance** screen to view the slide menu. Then select **Search** from the options in the slide menu.



4. In the search field, enter *"**Manage Administrator Profile Values**"*, then select the **Search** icon ( ).
5. From the search result, select **Manage Administrator Profile Values**.

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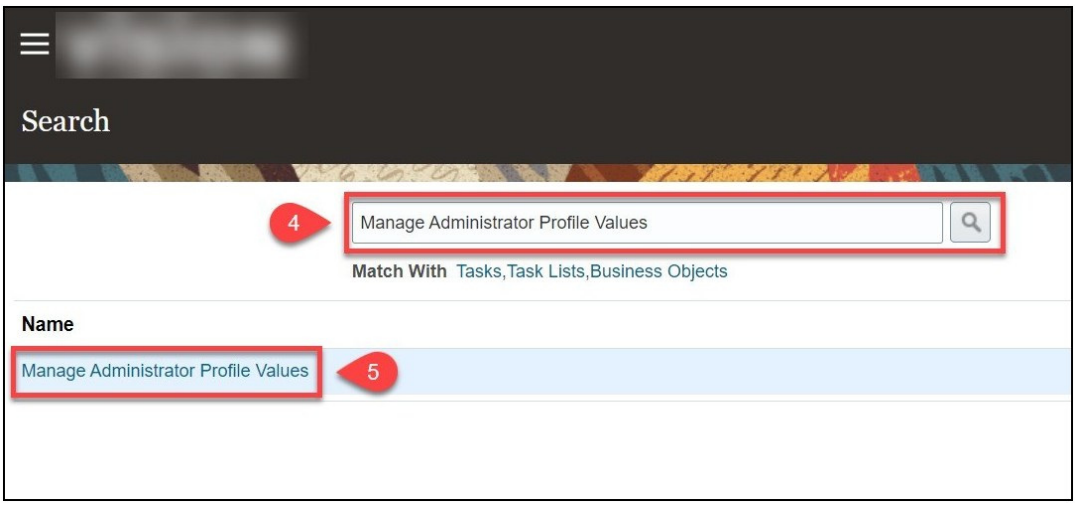
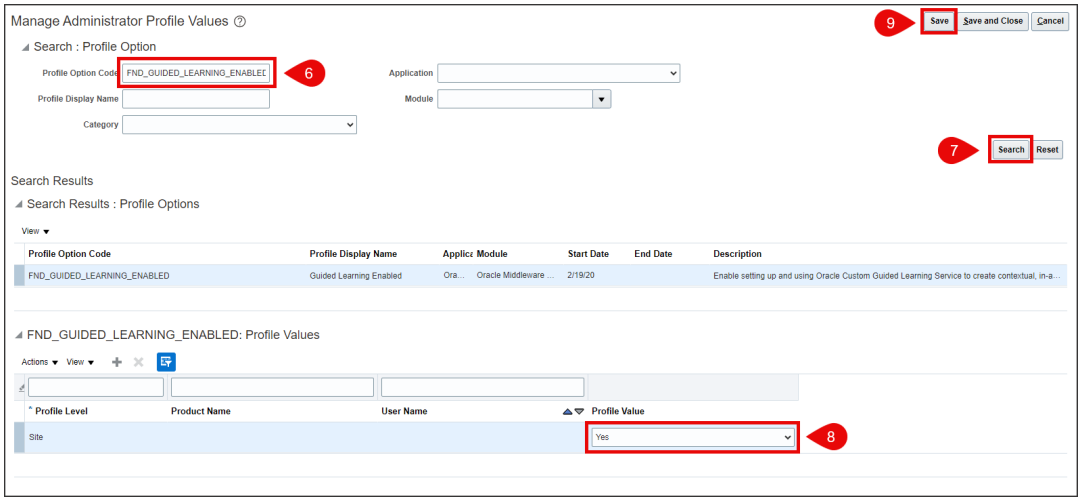


A new window opens now, where you can manage **Administrator Profile Values.**

6. In the **Profile Option Code** field, enter *"**FND_GUIDED_LEARNING_ENABLED**"*.
7. Select the **Search** button.
8. Under **FND_GUIDED_LEARNING_ENABLED: Profile Values**, set the **Profile Value** to **Yes**.
9. Select the **Save and Close** button on the top-right corner of the screen.



10. From the same **Manage Administrator Profile Values** window, replace the value in the **Profile Option Code** field with "**ORACLE.ADF.VIEW.ALLOWED_ORIGINS".**
11. Select **Search**.
12. Enter the **Profile Value** based on your specific data center region, as provided below:
    - **NA Tenancy**: 'self' https://guidedlearning.oracle.com
    - **EMEA Tenancy**: 'self' https://guidedlearning.oracle.com https://guidedlearning-emea.oracle.com
    - **APAC Tenancy**: 'self' https://guidedlearning.oracle.com https://guidedlearning-apac.oracle.com
13. Select **Save and Close**.

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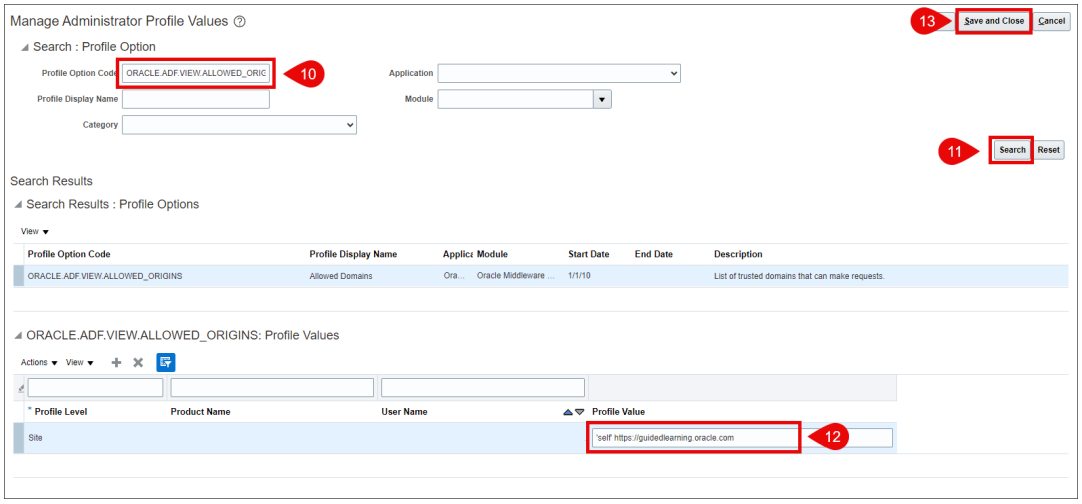

14. The OGL profile values are now enabled.

Creating and Publishing a Sandbox for OGL Configuration

Once the Profile Value is set, you can create a Sandbox for OGL configuration.

To create a Sandbox and publish:

1. Select the **Navigator** icon ( ) > **Configuration > Sandboxes**.

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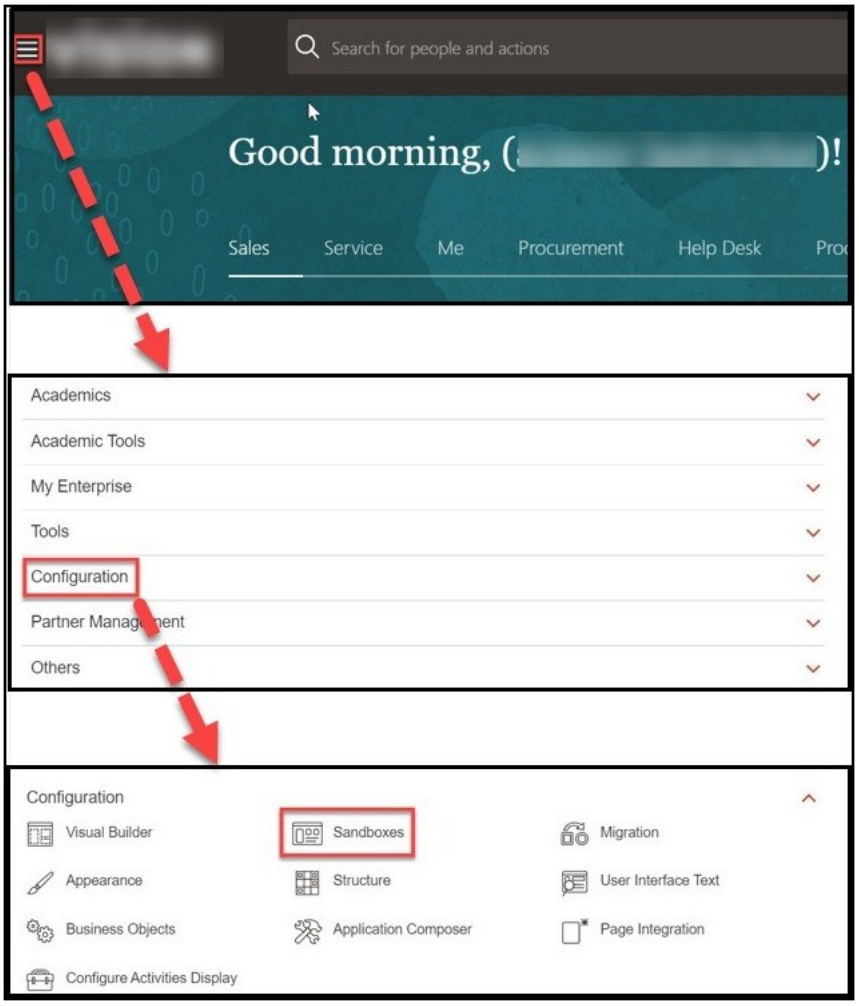
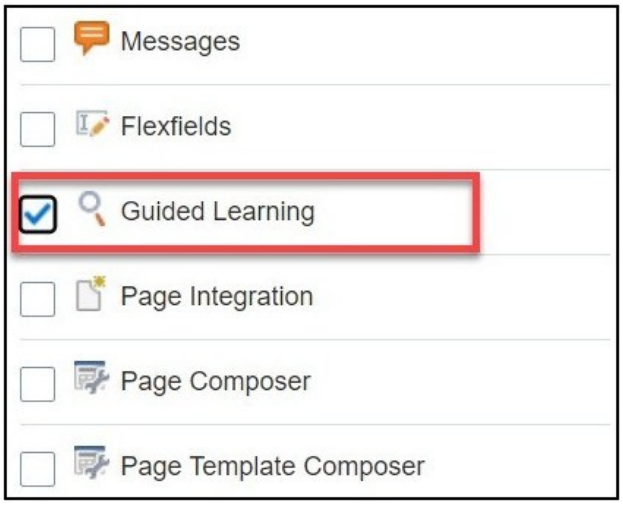


2. Select **Guided Learning** under the available tools.



> **Note**
>
> If Guided Learning is not available, complete the steps above in Prerequisite: ***Fusion Administrator Profile Value: Guided Learning Enabled***

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3. Select the **Create Sandbox** button. The **Create Sandbox** screen is displayed.
4. On the **Create Sandbox** screen, enter the **Sandbox Name** and an optional description.

> **Note**
>
> In the absence of an internal naming convention, the following naming convention is recommended, **OGL-YYYY-MM-DD-V#** (i.e., OGL-2020-10-09-V1)).

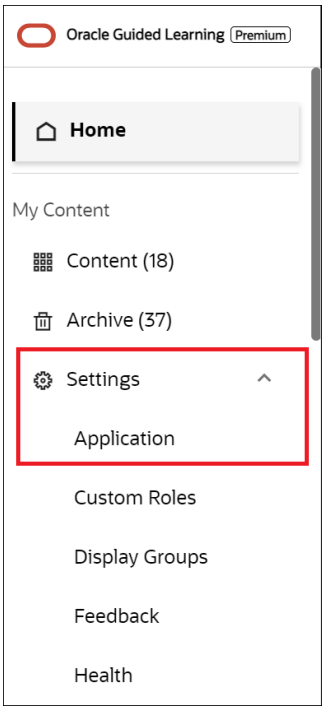
5. Set the **Publishable** option to **Yes**.
6. Select the **Create and Enter** button.

The **Sandbox** is now created and published.

Set Up Your OGL Account to Connect to Your Fusion Domains

To set up your OGL Account:

1. On the OGL console, go to **Settings>Application**.



2. Set the **Application Type** to **Fusion** if you are enabling OGL on an Oracle Fusion application.

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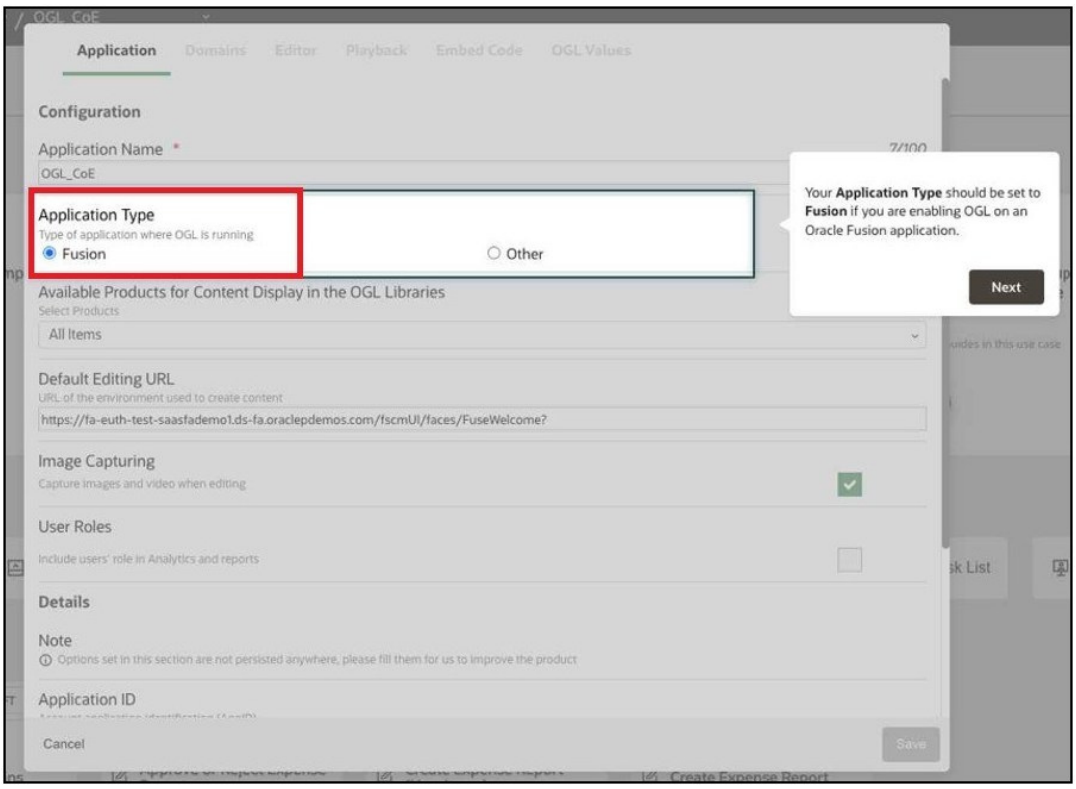
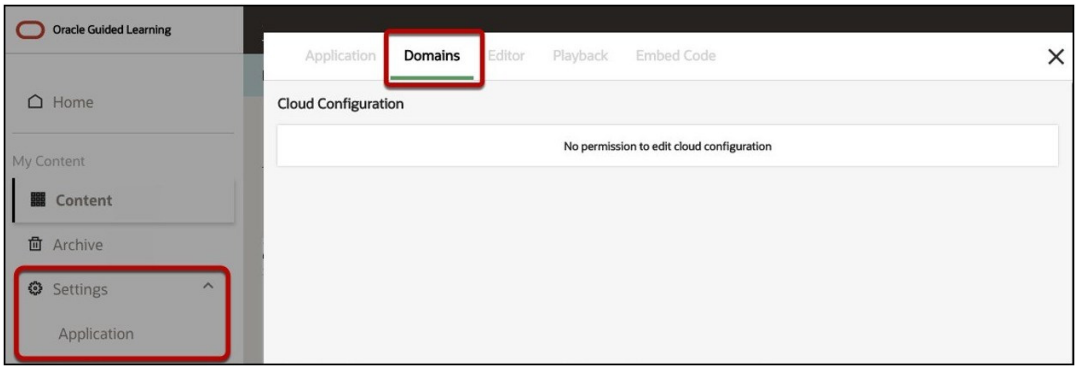


3. Select **Domains.**



4. While enabling OGL on an Oracle Fusion Application, the OGL **AppId** and **OGL Server** values are required to complete the OGL configuration in the Oracle Fusion application.

   Use the

button to copy **AppId** and **OGL Server** valuesto the clipboard and paste it to a text file to use later.

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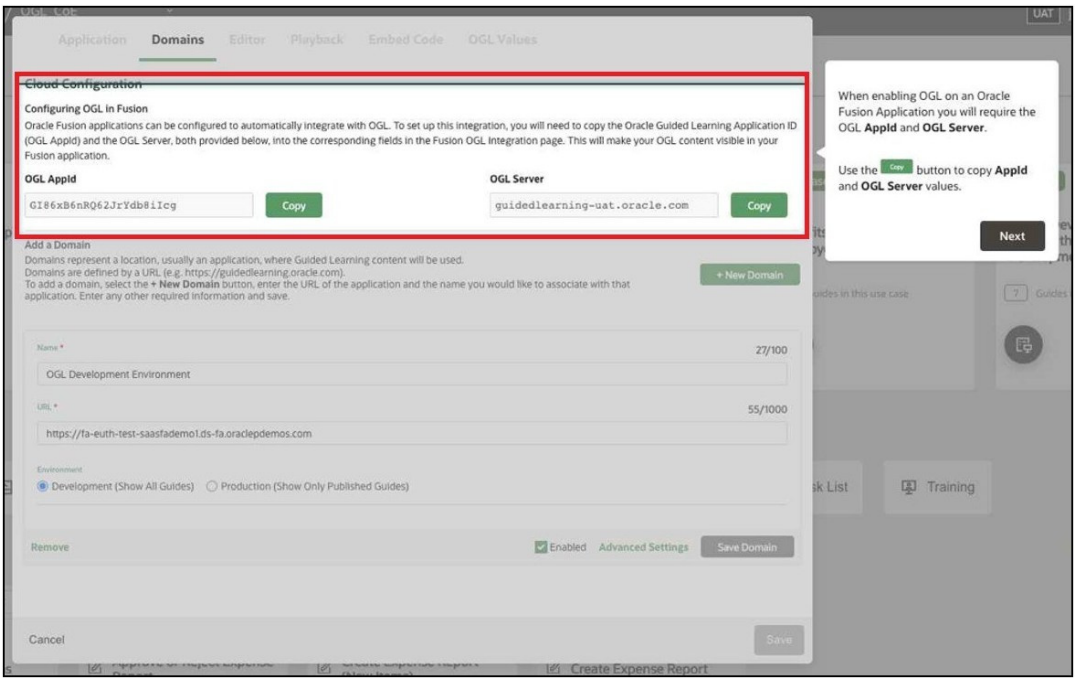
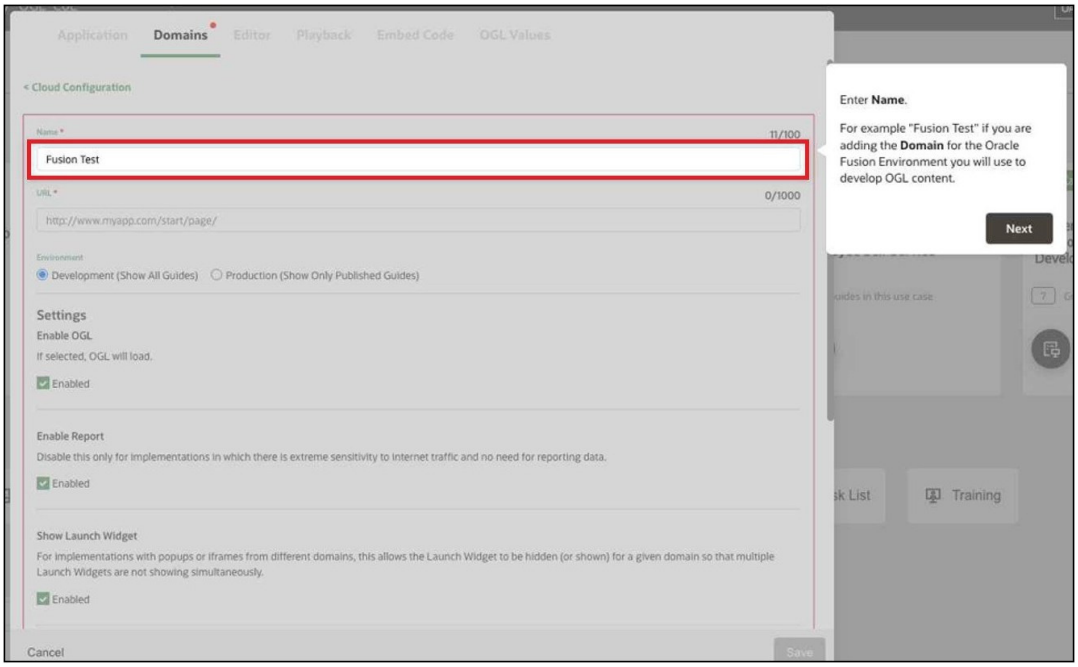


5. Select **+New Domain**.
6. Enter the desired Domain **Name**.For example, enter "*Fusion Test*" if you are adding the **Domain** for the Oracle Fusion Environment to develop OGL content.



7. Enter the **URL** for the Oracle Fusion environment domain.

> **Note**
>
> The **URL** must be limited to the top-level domain (.com) with no other proceeding characters.

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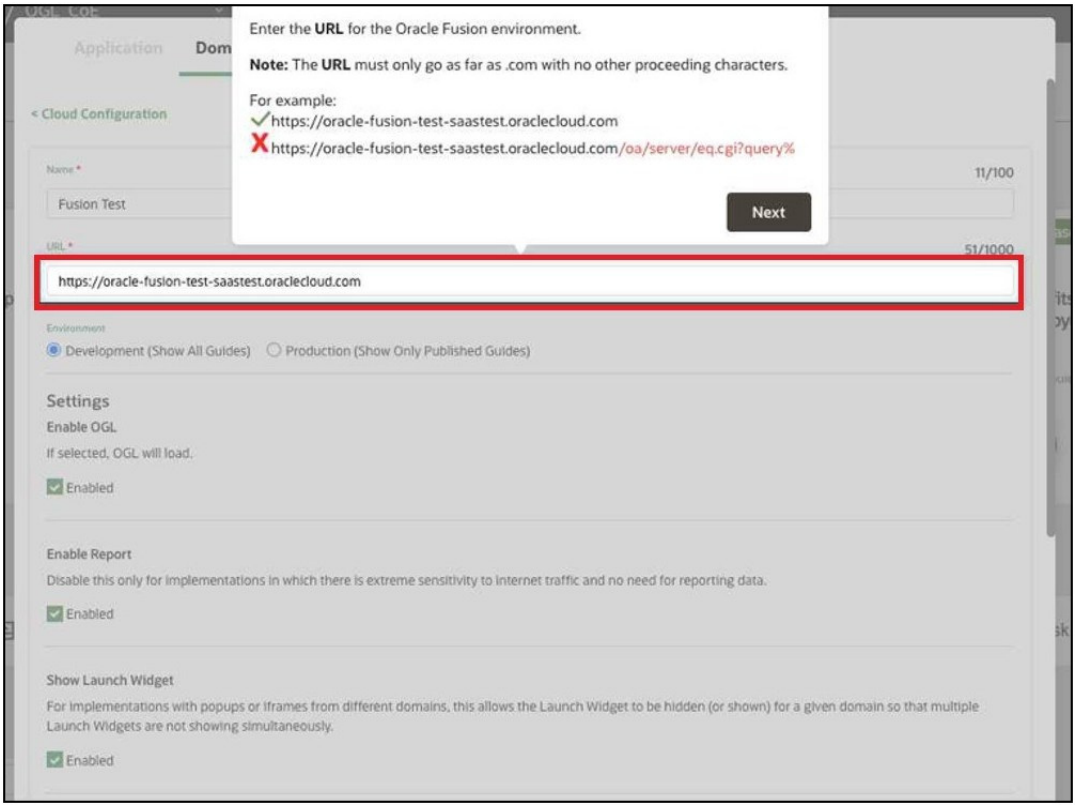
For example:

√ https://oracle-fusion-test-saastest.oraclecloud.com

χ https://oracle-fusion-test-saastest.oraclecloud.com/oa/server/eq.cgi?query%



8. **Anonymous plus Disabled Specific Domain(s)**
   If you want any domain to use the OGL Domains setting EXCEPT for a given domain, you should create an anonymous domain that is enabled and keep the other domain that is disabled. In this situation, the Domains tab would look like this:

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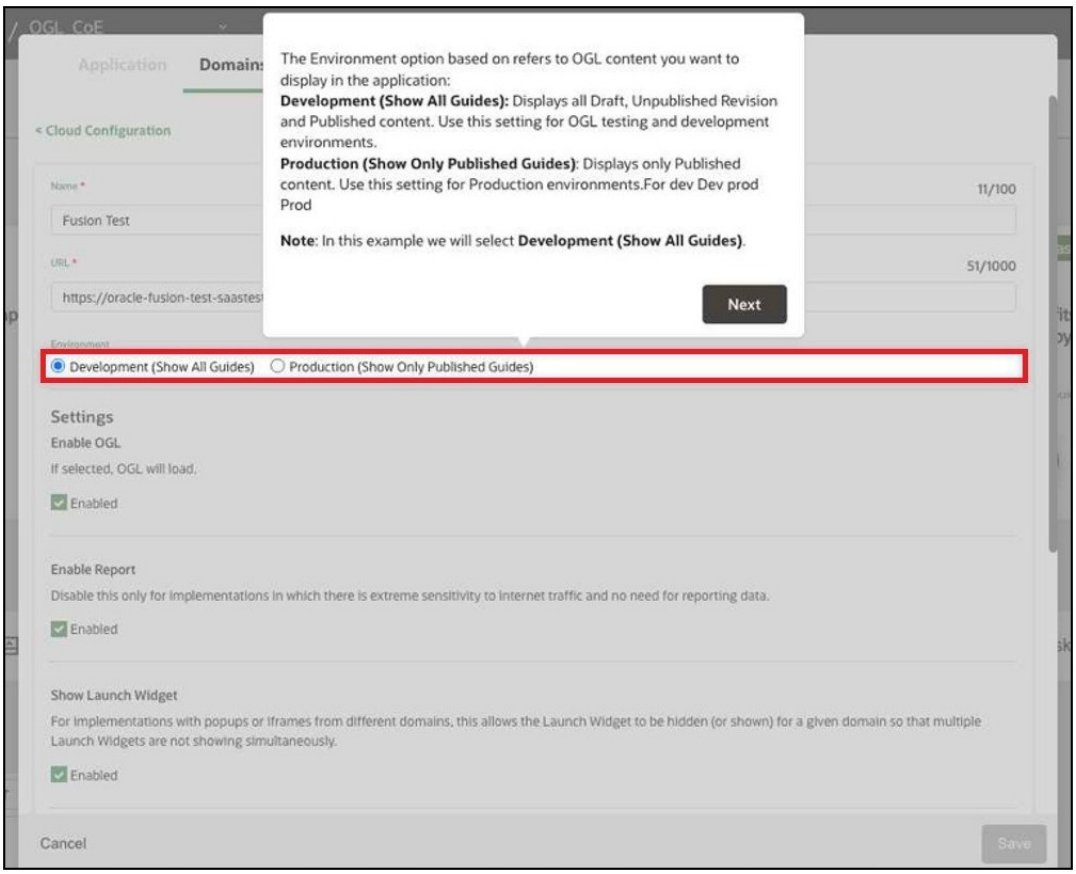

The Environment option refers to the OGL content you want to display in the application:

- **Development (Show All Guides):** Displays all Draft, Unpublished Revisions, and Published content. Use this setting for Fusion testing and development environments.
- **Production (Show Only Published Guides)**: Displays only Published content. Use this setting for Fusion Production environments.

  Note: *In this example, we selected* ***Development (Show All Guides).***

9. Review the **Settings** available, then select **Save Domain**.

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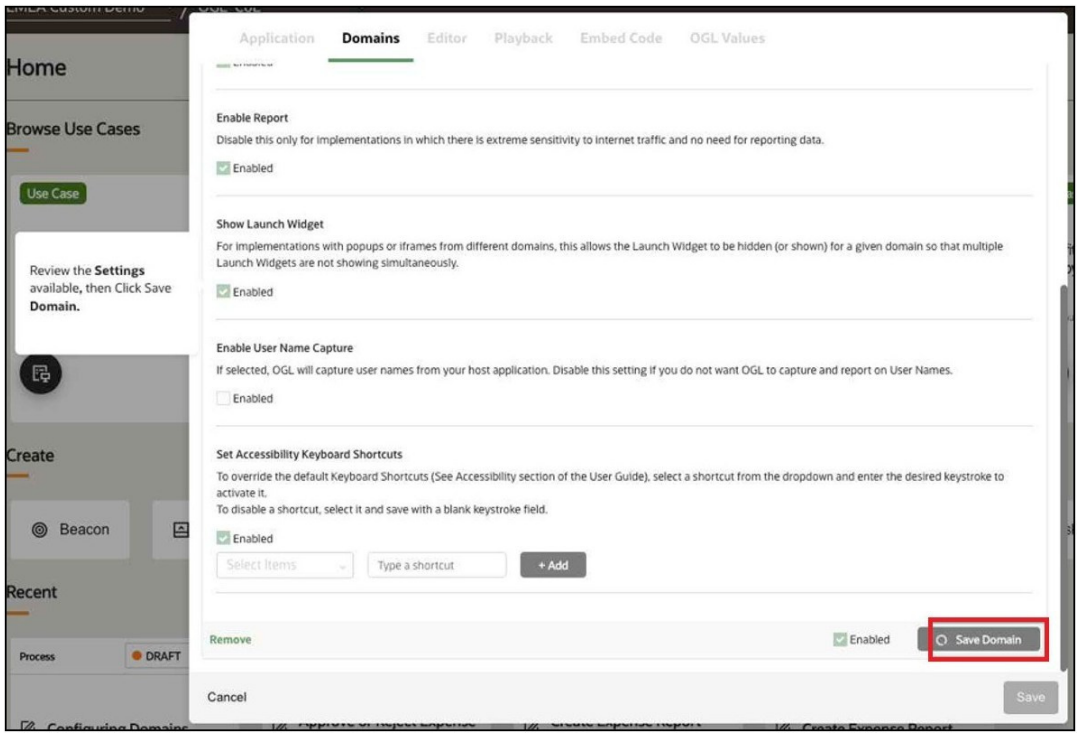
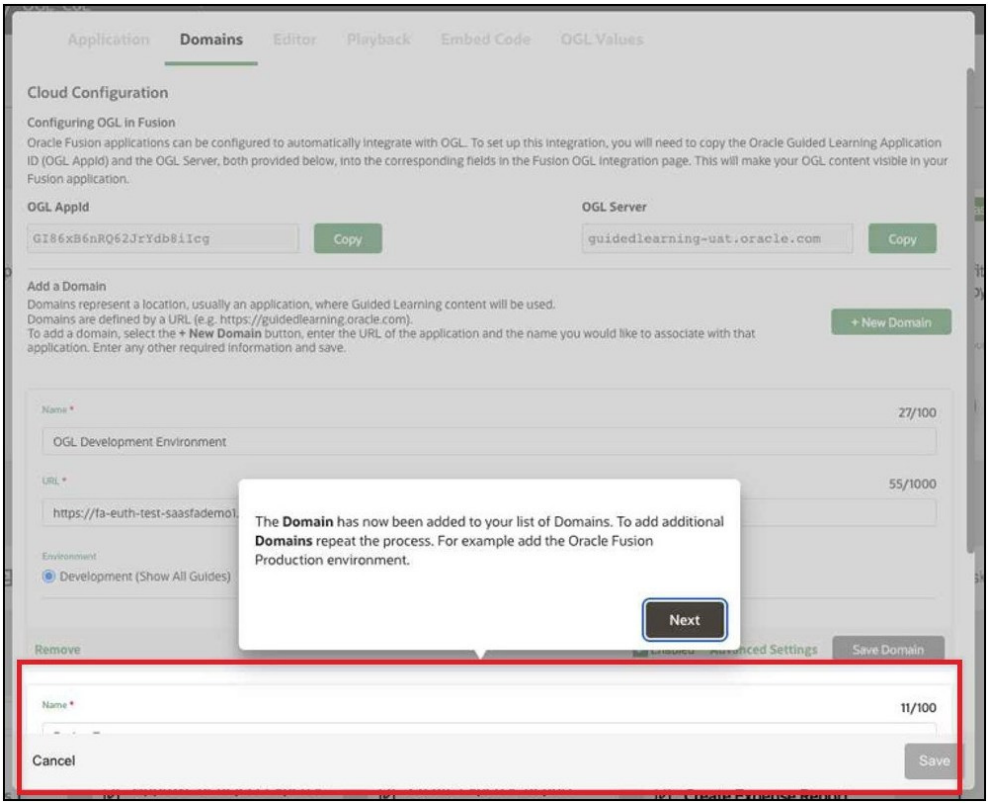


The **Domain** has now been added to your list of Domains. To add additional **Domains**, repeat the process.

10. Select **Save** to save the changes and exit the modal window.



Once the **Domain** is added to the OGL Console, the next step is to navigate to the Oracle Fusion Application

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Keep the **AppID** and **OGL Server** values handy, which is required in the upcoming process.

Complete the Configure Guided Learning Task in Fusion

To enable OGL on Oracle Fusion Application(s), login to the Oracle Fusion application as a user with the Oracle Fusion Application Administrator/Implementor role and create a sandbox that includes the **Guided Learning** tool set.

> **Note**
>
> In this example, we have already created a Sandbox with the required user login. Click here for details on how to create an Oracle Fusion Application Sandbox.

To configure Oracle Guided Learning

1. Select the **Settings and Actions** icon (

) at the top-right corner of your **Fusion** homepage, then select **Setup and Maintenance** from the options in the dropdown list.
2. Select the **Tasks** icon (

) on the **Setup and Maintenance** screento view the slide menu. Then select **Search** from the options in the slide menu.
3. In the search field, enter ***Configure Guided Learning***, then select **Search.**
4. From the search result, select **Configure Guided Learning**.

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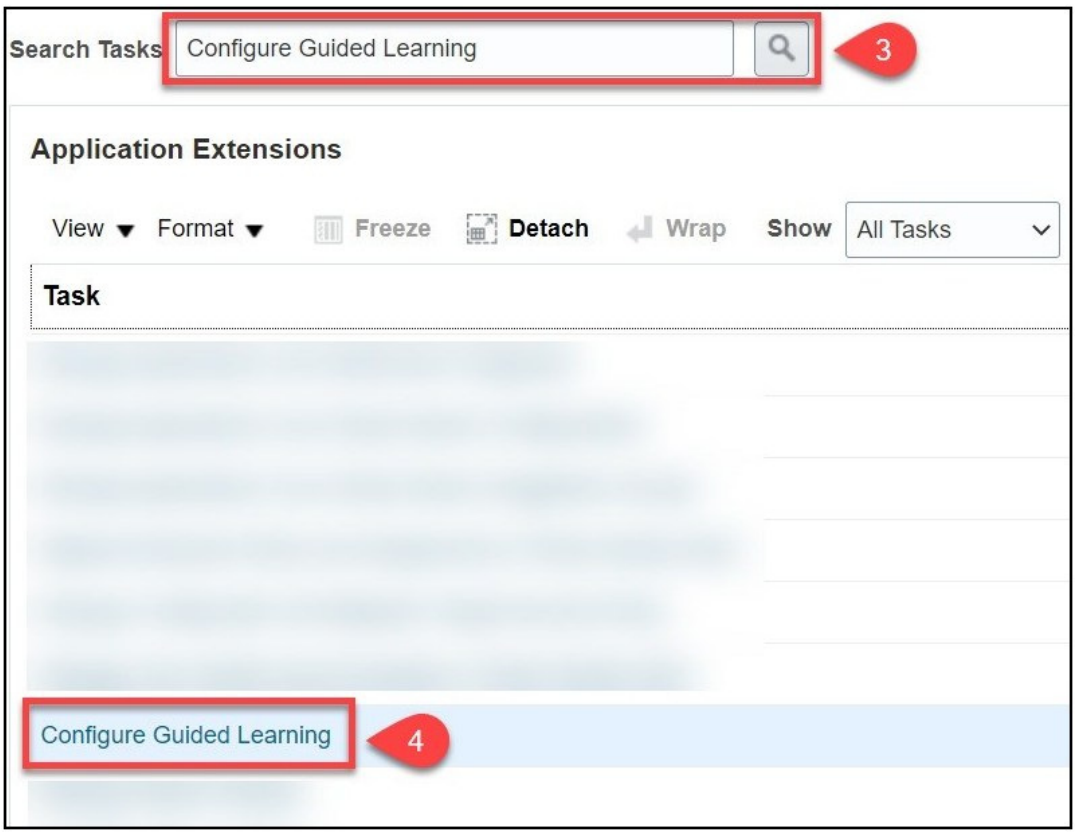
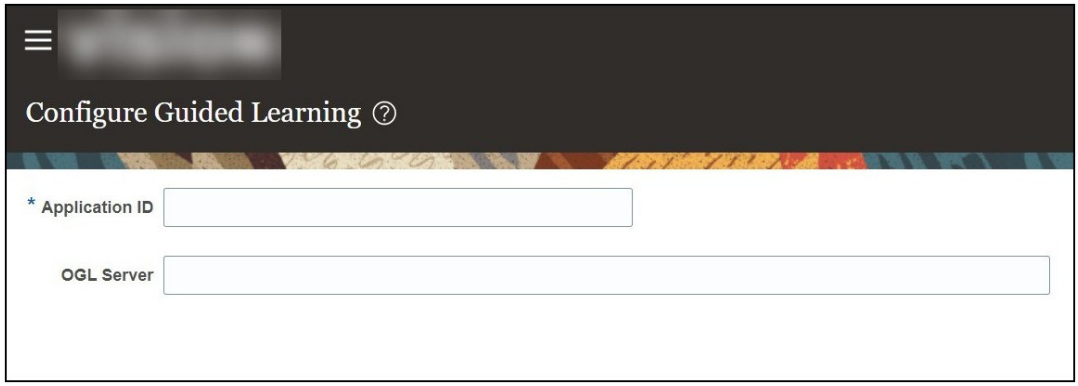


The **Configure Guided Learning** page is displayed.

5. Enter the **Application ID** and the **OGL Server** URL based on your OGL Tenancy (You can find and copy this information from the OGL Console in **Settings > Application > Domains** (see screenshot shown below):
NA Tenancy: guidedlearning.oracle.com

EMEA Tenancy: guidedlearning-emea.oracle.com

APAC Tenancy: guidedlearning-apac.oracle.com



> **Note**
>
> Enter only the **OGL Server** name as per your console (i.e., do not include "***https://***" or other characters).

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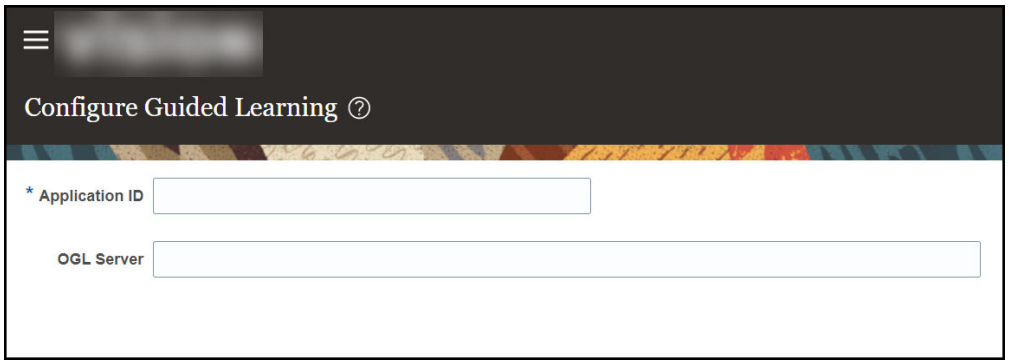
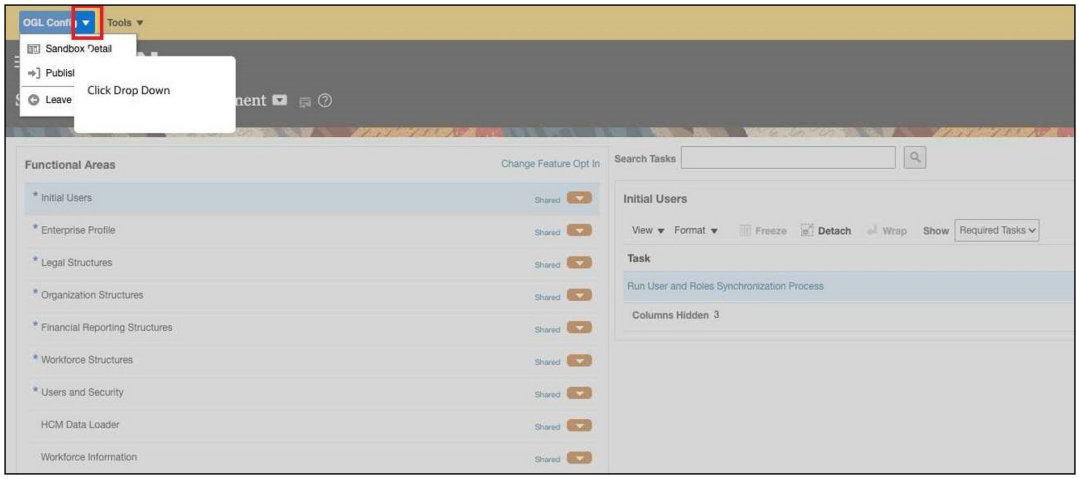
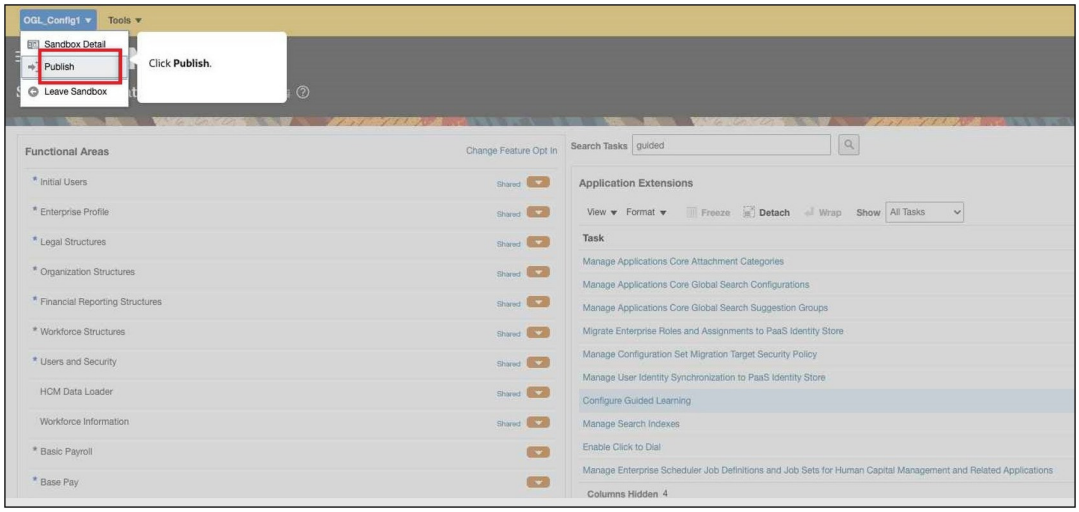


6. Select **Save and Close**.
7. Select the **Sandbox** dropdown menu.



8. Select **Publish** andthen select **Yes** to publish the OGL settings for the Oracle Fusion application.



OGL is now enabled on your Oracle Fusion Application. You can repeat the process for all Oracle Fusion applications that require OGL integration.

Once these actions are completed, the OGL widget should display on your Home Screen.The OGL widget looks like this:

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> **Note**
>
> If the **OGL Widget** does not display, please review your organization's **Content Security Policy.** For more information about Content Security Policy (CSP) errors and how to troubleshoot them, refer to the CSP Error Correction Knowledge Article.

Integrating EPM Cloud with Oracle Guided Learning

From EPM Release 24.08, you no longer need an OGL extension to view your OGL content. An enhancement in EPM, "EPM Embed" seamlessly integrates the OGL JavaScript directly with your EPM application.

> **Note**
>
> This feature is available for EDM releases 24.12 onwards.

Pre-requisites for Configuration
User needs to have Service Administrator role to see the OGL setup page.

> **Note**
>
> If you have been using an OGL extension in your browser. please follow steps 4 and 6 to de commission the OGL EPM Extension to return to configure EPM Embed as given in Steps 1 to 3 below.

Configuring OGL Settings in EPM Environment
Follow these steps to integrate an OGL application into your EPM Cloud environment:

1. Navigate to **Applications**, then **Settings** (For Financial Consolidation and Close, FreeForm, Planning, Profitability and Cost Management and Tax Reporting applications)

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> **Note**
>
> - For Narrative Reporting of EPM: Navigate to **Tools**, then **Settings.**
> - For EDM: Navigate to **Tools** > **Settings**> **Oracle Guided Learning**.

> **Note**
>
> For more information about OGL on EPM, refer to the following Documentation.

2. Enter the following Oracle Guided Learning Settings:
   - **Application ID** <OGL Application ID supplied to your OGL Administrator by Oracle>
   - Server URL
   - Depending on your OGL data centre region, choose the Server Value as provided below:
     - NA Tenancy: https://guidedlearning.oracle.com
     - EMEA Tenancy: https://guidedlearning-emea.oracle.com
     - APAC Tenancy: https://guidedlearning-apac.oracle.com

     > **Note**
     >
     > Ensure to use **https://** protocol when entering the OGL server URL.

3. Click **Save**. Your OGL Help widget will start to display on your Home screen upon re login for the OGL changes to be reflected.

> **Note**
>
> Having OGL embed on your EPM/EDM application and also OGL extension may cause unpredictable behavior in the OGL interface for end users as both java scripts from the Embed and Extension can interplay.

EPM Domain

EPM embed by default treats its EPM Domain as Production. This means it will show only published OGL content on such EPM domain. EPM user need to specify the Domain as Development, in order to show all guides (draft, published).

To configure your EPM environment as Development:

- Sign in to the OGL Console.
- In the left Navigation menus, click Settings> click Applications>and then click Domains.
- Select New Domain and enter the Domain Name and URL (make sure the URL is till .com, e.g. set Environment = Development.
- To render only published content, set Environment = Production, and set the domain status to "Enabled".

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- Click "Save Domain".

> **Note**
>
> Ensure to complete Domain entry configuration correctly for OGL content to display on all host applications, appropriate to the setting. Remember OGL content will not serve to domains not listed in OGL Cloud Configuration.

Follow steps 4 and 6 to un-install / re issue the OGL Extension.

4. Remove extension from your local computer.
   - Click the 3 dots in your Browser setting → Navigate to Extension → Manage Extensions → select extension to remove → Click Remove.
   - If your Extensions are managed by your Company IT organization, contact your IT Administrator to have bulk removal.
5. Bulk remove OGL extension from Chrome Store.
   - Submit Support request to Oracle Guided Learning support or contact your OGL Account Manager and provide details such as
     - OGL Server URL,
     - OGL App ID,
     - EPM Production instance URL and / or
     - EPM Development instance URLs as applicable,
     - the Chrome store link which was shared to you when you received the OGL Extension
   - Oracle Guided Learning support will coordinate the removal of the extension from Chrome Store and update your Support request.
6. Have your Extension re-issued, If you need to drop only your EPM product from your OGL Extension retaining extension for all other Oracle products.

Auto Segmentation

7. https://docs.oracle.com/en/education/oracle-university/guided-learning/user-guide/ogl-user-guide.pdf feature in OGL helps launch the guide from the EPM users page instead of launching the guide from first step. To activate this functionality in EPM Embed you will need to enhance your EPM Embed experience with auto segmentation and perform the following steps.
8. Submit Support request to Oracle Guided Learning support or contact your OGL Account Manager and provide details such as
   a. OGL Server URL
   b. OGL App ID
   c. EPM instance URL (dev / prod) where this functionality needs to be available
9. For the details submitted, Oracle will include the auto segmentation function to the Customer's Java Script configuration. This will enable the OGL user to launch guides from their current page.
10. Check your Application Editor setting to ensure Enable Autogenerated Guide Conditions is turned on.

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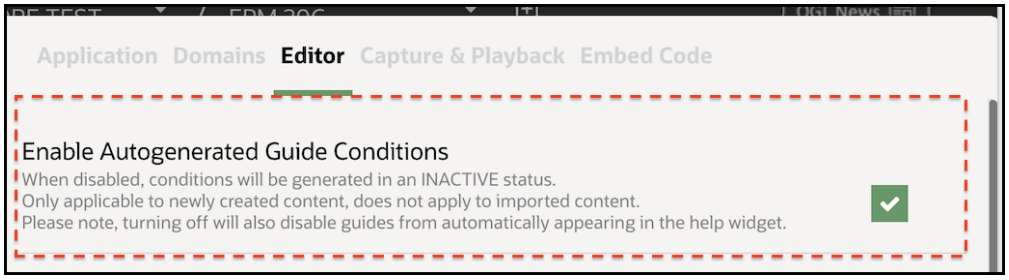

11. For existing guides, Re-open the guide in Flow Editor and save. Check the guide to verify if the auto generated route condition in activation settings is showing properly.

12. Test and deploy the guide.

Frequently Asked Questions

1. Does page auto segmentation now work with EPM Embed?
   In order to get auto segmentation work for EPM Embed, Customers have to follow the steps outlined for use of auto segmentation. Refer steps 7 to 12 given above. If Customers have used EPM Extension to deploy their OGL, they need to first have Extension uninstalled / URL removed from their Extension and move to EPM Embed.
2. How can Customers who have multiple 3rd party applications in one extension, move to EPM Embed?
   Customers who have multiple 3rd party applications in one extension have to follow steps 5 and 6 given above in order to move to EPM Embed.
3. Does EPM Embed allow role segmentation?
   EPM Embed now available in Release 24.08 does not support role segmentation / user group segmentation. This is an enhancement planned for future release. However EDM Release 24.12 supports Role segmentation for roles: SERVICE_ADMIN, ACCESS_CONTROL_MANAGER, ACCESS_CONTROL_VIEWER, MIGRATION_ADMINISTRATOR, SECURITY_ADMIN, VIEW_CREATOR, APP_CREATOR & AUDITOR
4. Can Existing EPM clients who are currently using OGL via extension trial the new EPM embed?
   EPM Embed now available in Release 24.08. (For EDM releases 24.12 onwards) Client in prior release of EPM need to check with EPM support on how to get EPM embed on a lower version of EPM.
5. How can EPM client currently using OGL via extension remove it from their Chrome browser?
   Customers who installed OGL extension via Chrome Store will have to follow steps 5 and 6 given above in order to remove their extension.

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Customers who installed OGL extension via their local IT Administration, have to contact their local IT Administration team to have their extension removed.

> **Note**
>
> Starting EPM 24.12 release, removing extension is a must before moving to EPM embed to avoid unforeseen errors.

6. Does Embed allow for more seamless branching (of guides) across EPM modules?
   Embed allows for seamless branching
7. Does Embed allow ability to better define selectors?
   a. Embed allows for better selector using FQID (Fully Qualified id). Refer to https://docs.oracle.com/en/cloud/saas/enterprise-performance-management-common/cgsad/creating_ogl_content_for_epm.html
   b. Embed allows for better selector using auto-segmentation (details on how to implement auto-segmentation is provided in the earlier sections)
8. Moving away from runtime extension, and starting with EPM embed, The application inside the iframe is another EPM application which also uses OGL EPM embed and this causes two widgets to appear?
   a. A ticket needs to be raised to Oracle team to make changes, i.e. remove tline of code in Cloud config.: **"showStartPanel":true**
   b. Refresh after Cloud config is saved
9. I am not seeing user names in OGL analytics dashboard, instead I am seeing as encrypted data. How can I enable user names to show in OGL analytics dashboard?
   a. Submit Support request to Oracle Guided Learning or contact your OGL Account Manager and provide details of your OGL App ID. Oracle will process the support request and start to capture "user name" in Customer's OGL analytics. You may then navigate to OGL Settings / Application/ Domains / Advance settings /**Enable User Name Capture.**
   b. Please make sure your EPM version is 24.12 or above.

   > **Note**
   >
   > The analytics data will show “user first name” from the time, this setting has been updated.

10. What is EPM Automate?
    EPM Automate enables users to remotely perform tasks within Oracle Enterprise Performance Management Cloud environments. For more information about EPM Automate, refer to this topic in the Oracle Fusion Cloud EPM User Guide: https://docs.oracle.com/en/cloud/saas/enterprise-performance-management-common/cepma/using_epmctl.html
11. How do I install EPM Automate?
    You install EPM Automate to run commands. Some commands can also be run directly in Oracle Enterprise Performance Management Cloud using Groovy scripts without installing EPM Automate. EPM Automate installer for Windows and Linux/UNIX, and macOS X is available from your EPM Cloud environment. Refer to the links below for instructions on how to install EPM Automate:

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For Windows: https://docs.oracle.com/en/cloud/saas/enterprise-performance-management-common/cepma/installing_epm_automate_windows.html

For Linux/UNIX/macOS X: https://docs.oracle.com/en/cloud/saas/enterprise-performance-management-common/cepma/installing_epm_automate_linux_unix.html

12. How do I set an IP Allow list of IP Addresses in EPM Cloud?
In some instances, you may need to setup and configure an IP address allowlist of the OGL server or the outbound IP address of the data center that hosts the OGL server must be added to the IP allowlist in order to connect to OGL server. By configuring an 'allowlist' or a 'denylist', adminsitrators can control whether Internet Protocol (IP) addresses belonging to a network can connect to an environment. An allowlist contains rules that define which IP addresses can access an environment while a denylist contains rules that exclude IP addresses from connecting to an environment.

    For information and instructions on how to set IP allowlist, refer to the following topic in the Oracle Fusion Cloud EPM User Guide: https://docs.oracle.com/en/cloud/saas/enterprise-performance-management-common/cepma/epm_auto_set_ip_allowlist.html

13. How do I upload files from local computer to the service?
Refer to the instructions outlined in this topic in the Oracle Fusion Cloud EPM User Guide: https://docs.oracle.com/en/cloud/saas/enterprise-performance-management-common/cepma/epm_auto_upload_file.html

Enabling OGL by Embedding JavaScript

You can use JavaScript to embed OGL in a Fusion application or other web applications.

To embed the JavaScript in a non-Fusion web application, you add the provided JavaScript to all pages in your application where you want to use OGL. Because there are as many different ways to do this as there are web applications, we cannot address specific steps for non-Fusion applications. In general, add the OGL JavaScript to a common part of your application, such as the header or footer area.

Embed OGL JavaScript in Fusion

Creating and Publishing a Sandbox for OGL Configuration

> **Note**
>
> - The JavaScript embed profile value should be set to **No**.
> - Make sure there is no active sandbox.

To create a Sandbox and publish:

1. Select the **Navigator** icon (☰), > **Configuration > Sandboxes**.

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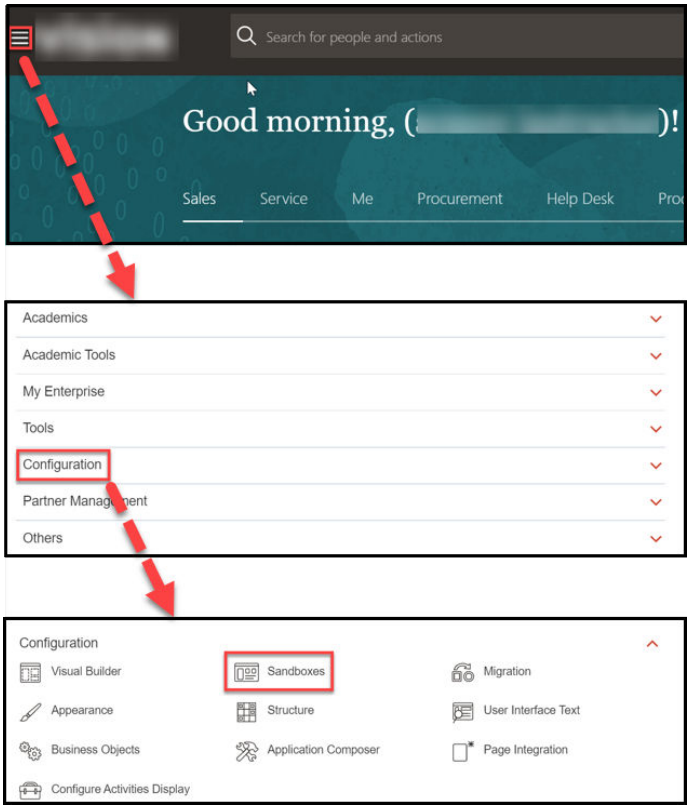
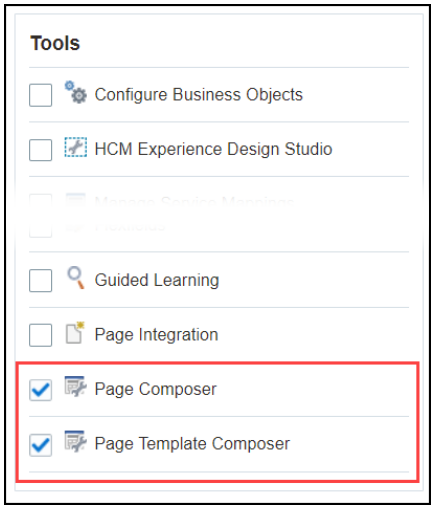


2. Select **Page Composer** and **Page Template Composer** under the available tools.



3. Select the **Create Sandbox** button.

   The **Create Sandbox** screen is displayed.

4. On the **Create Sandbox** screen, enter the **Sandbox Name** and an optional description.

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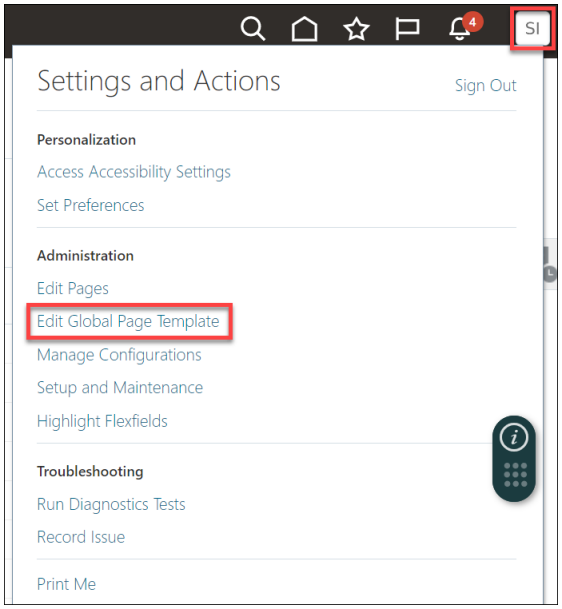
> **Note**
>
> In the absence of an internal naming convention, the following naming convention is recommended, **OGL-YYYY-MM-DD-V#** (i.e., OGL-2020-10-09-V1)).

5. Set the **Publishable** option to **Yes**.
6. Select the **Create and Enter** button.

The **Sandbox** has been created and entered.

Embedding the Script

1. While still in the sandbox, select the **Settings and Actions** icon (SI) at the top-right corner of your **Fusion** homepage. Then Select the **Edit Global Page Template** from the options in the dropdown list.



2. Select the **Global Page Template** label area (highlighted in blue).

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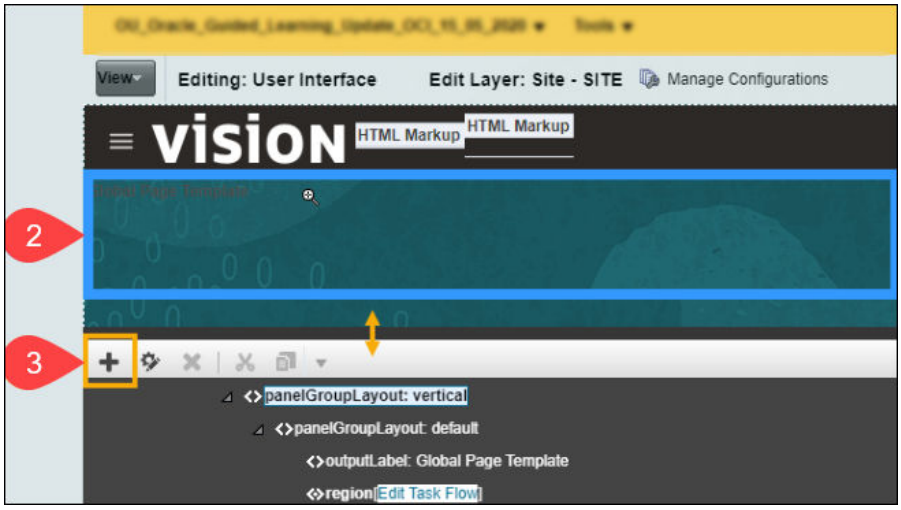
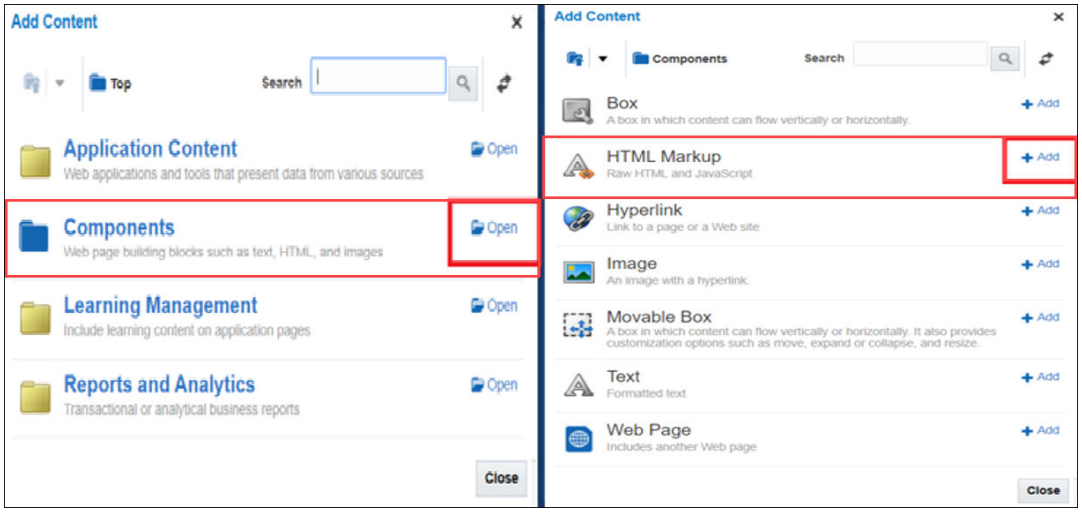


3. Select the **Add** icon(+) in the footer area; you may need to drag the toolbar up to bring it into view.
   Now, the **Add Content** modal window appears.
4. Select **Open**, next to **Components**, and then select **Add**, next to **HTML Markup.**



Select **Open**, next to **Components**, and then select **Add**, next to **HTML Markup.**

The **HTML Markup** settings is now visible.

5. Select **View**, then select **Design**.

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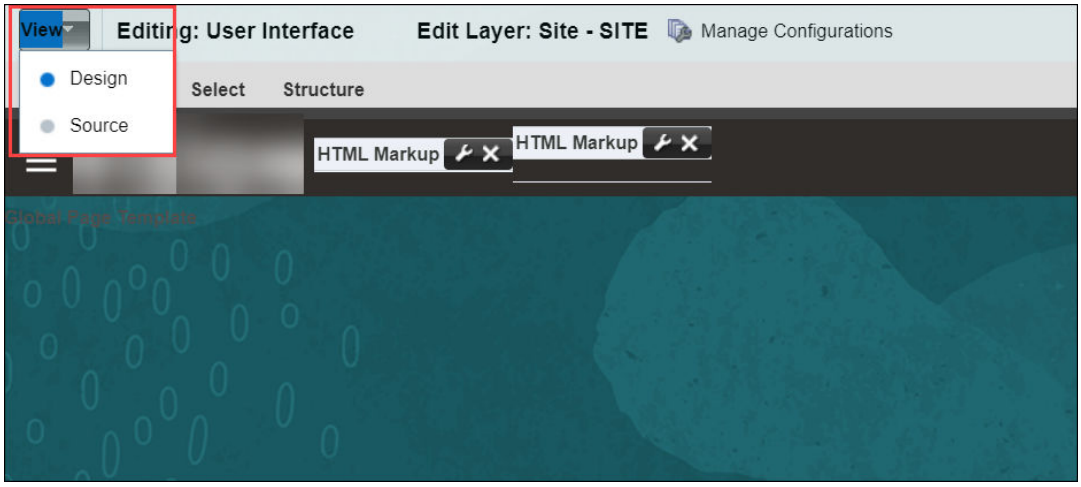
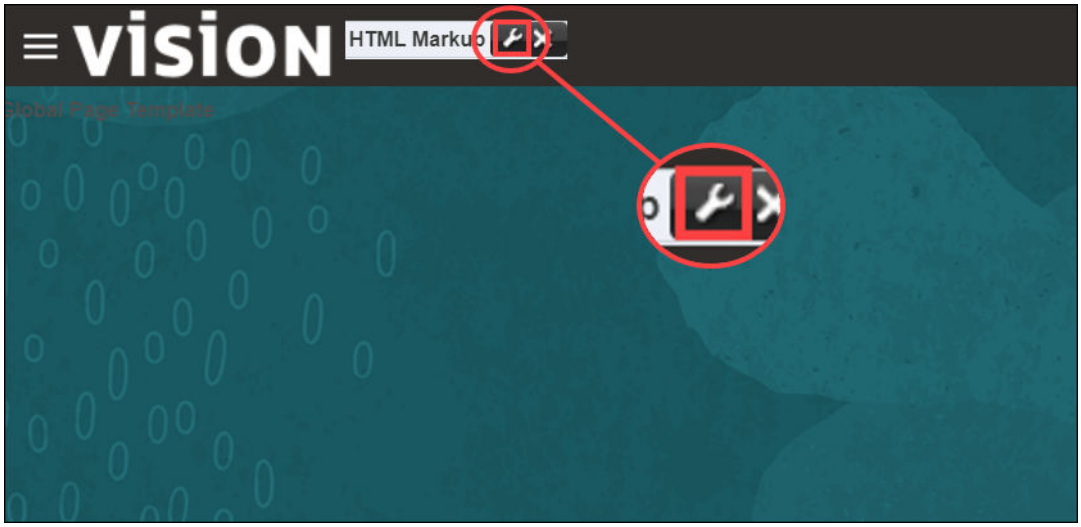


> **Note**
>
> If you are unable to select **Design**, try enabling the Administrator Profile Value in Setup and Maintenace > Manage Administrator Profile Values >FND_PAGE_COMPOSER_SOURCE_VIEW > Set to “Yes”.

6. Select the **Edit** icon (🔧) of the newly added **HTML Markup** component.



The **HTML Markup** editor is now visible.

7. Select the **Value** dropdown, then select **Expression Builder**.
8. Replace the contents of the **Type a value or expression** field with the **OGL JavaScript**, then select **OK**.

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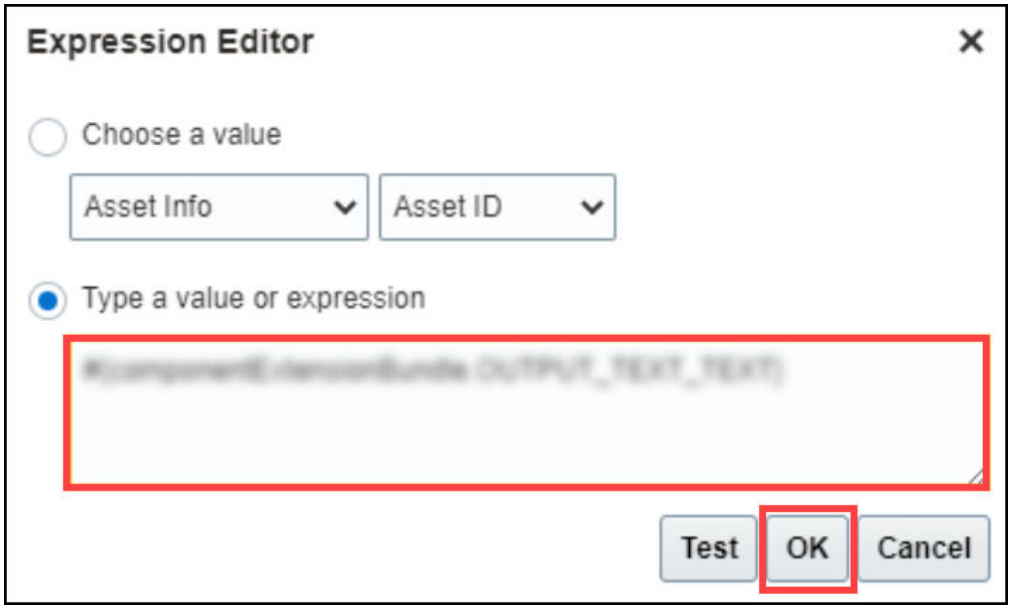
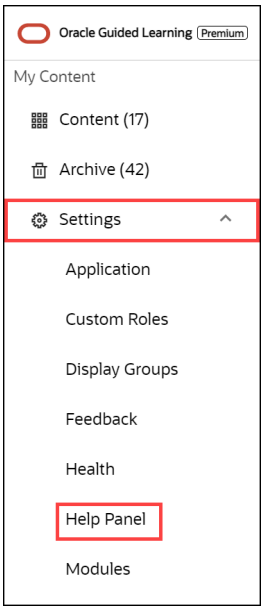


9. Select **OK** again and select **Close**.
The JavaScript embed process is now complete.

10. Verify that the **OGL Widget** ( ) is visible. If the widget is not visible, perform the following steps:

    a. Go to the **OGL Console**, then select **Help Panel** in the **Settings** tab.



    b. Ensure that the **Show Launch Widget even if there are no guides to display in Help Panel** option is enabled.

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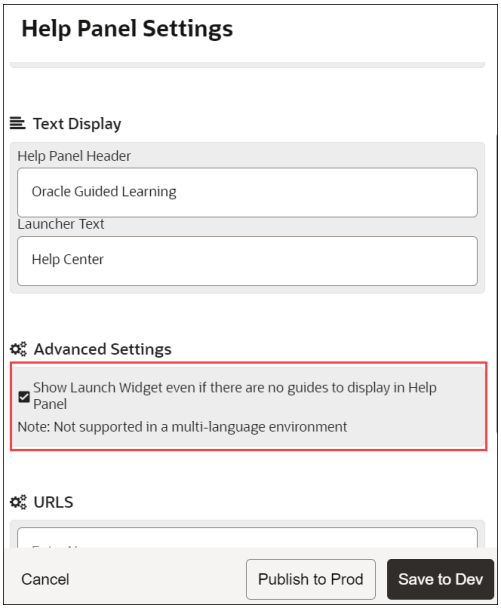

c. Ensure that the **Show Launch Widget even if there are no guides to display in Help Panel** option is enabled.

d. Wait 30-60 seconds then refresh your Fusion instance. If the OGL widget is still not displayed reach out to your OGL contact or create a support ticket on My Oracle Support.

11. When you are ready, publish the sandbox to make your content available to users. To publish the sandbox, follow these steps:

a. Click the Sandbox Name, then select **Publish**.

b. An information dialog box is displayed, select **Yes** to confirm.

c. Select **Publish**.

d. A warning dialog box is displayed, select **Yes** to confirm the action.

The OGL Console

The **Oracle Guided Learning** provides a simple, user-friendly interface that lets you easily navigate the features. The user interface is organized into pages and features that help you accomplish your tasks. Additionally, we have incorporated OGL onto your OGL console (**OGL-On-OGL**) to help orient you to the user interface and to provide guidance on navigating the console.

The Redwood Theme

Redwood is the name of the approach to our next-generation product and communication design, user experience platform, and brand design system. While it's not the only manifestation of the changes we're making, it's perhaps the most visible. Redwood is at the core of our express goal: getting customers to fall in love with Oracle one interaction at a time.

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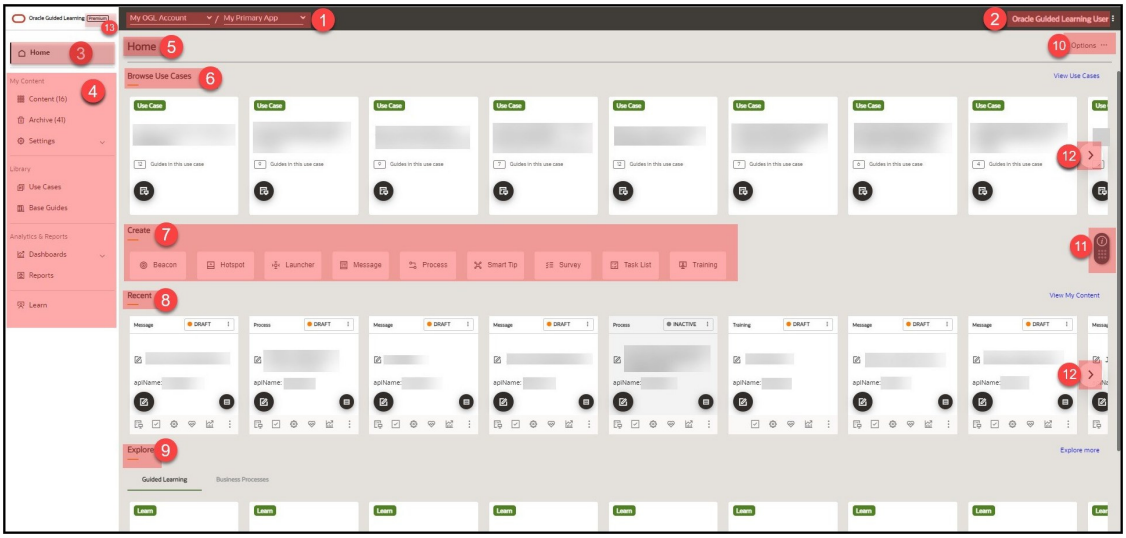
This is just the beginning. Redwood is a living thing, and all of us are going to help it evolve and improve in the coming months and years.

Redwood is the recommended theme for all Oracle Applications. OGL content is best presented in the Redwood theme and is optimized for Oracle Fusion applications that also apply the Redwood theme.

Homepage UI Elements

Let us get familiarized with some of the homepage UI elements.

The **OGL Homepage** looks like this.



No	Element	Sub Menu/ Element	Function
1	**Account and Apps**		Displays the **Account Name** and the **Application Name**.
2	**User Menu**	**My Profile, Help, Support, Forum, About** and **Sign Out**	Displays the **Profile Information** and **Profile Settings**. Provides the hyperlink to the **OU Support Help**, **User Guides**, and **Forums**. It also contains the OGL info and options to **Sign Out** of OGL.
3	**OGL Homepage Button**		It returns you to the **OGL Homepage** from the current page you are on.
4	**Main Navigation Menu**	**My Content, Library, Analytics & Reports and Learn**	**My Content** lists all the existing guides, and **Archive** shows all archived guides. The **Library** section consists of Use cases and Base Guides. **Analytics & Reports** provides an interactive Dashboard and OGL user analysis reports. Finally, the **Learn** option takes you to the learning center.
5	**Homepage Title**		The **Homepage Title** is exclusive to the homepage and indicates that you are on the homepage.
6	**Browse Use Cases**		Provides quick access to **Use Cases** from the Use Case Library.

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No	Element	Sub Menu/ Element	Function
7	**Create**	**Beacon**, **Hotspot**, **Launcher**, **Messages**, **Process**, **Smart Tip**, **Survey**, **Task List** and **Training**	This menu lets you create different OGL guides, including **Beacon**, **Hotspot**, **Launcher**, **Messages**, **Process**, **Smart Tip**, **Survey**, **Task List**, and **Training**.
8	**Recent**		Displays the recently used guides.
9	**Explore**	**Guided Learning** and **Business Process**	This library provides access to training resources on **Guided Learning** and **Business Processes**.
10	**Options**		Options let you filter the contents you see on the homepage.
11	**Help Widget**	**Getting Started**, **OGL Digital Learning**, **Documentation** and **Support**	The **Help Widget** in the OGL Console offers a variety of tours, help and support resources, and access to training on how to use the **OGL Console** effectively.
12	**Scroll Button**		Scroll right and left between content tiles with the **Scroll Buttons**.
13	**Premium Badging**		Premium badges are exclusive to premium accounts. This insignia indicates that your OGL account is a premium account with access to premium features and unlimited guides.

Guide List and Views

The OGL homepage displays the various content categories. By default, it provides quick access to **Use Cases**, **Recent guides**, and **Learn resources**.

Use Cases

Use Cases are curated collections of pre-built guide packages that were designed by Oracle experts and are based on real business scenarios. Use Cases provide guide templates that employ Oracle best practices for various Oracle Fusion applications. Each Use Case may contain one or more guides of various categories, including **Message** guides, **Process** guides, **Smart Tips**, etc.

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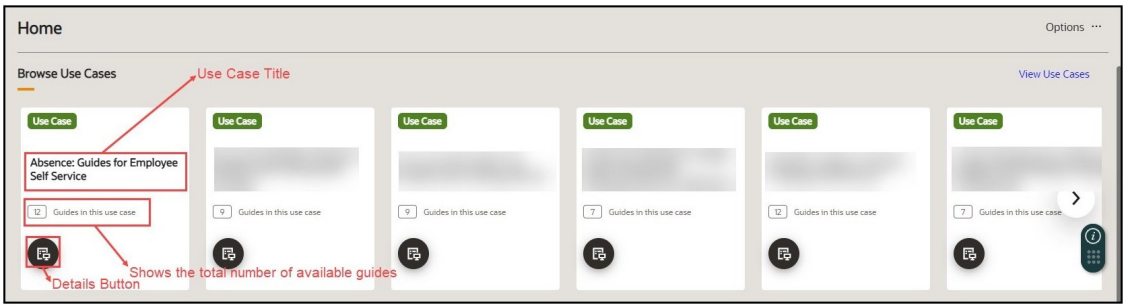
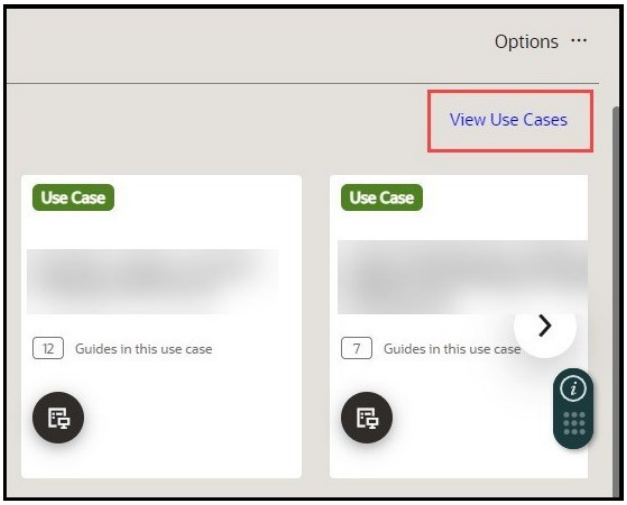


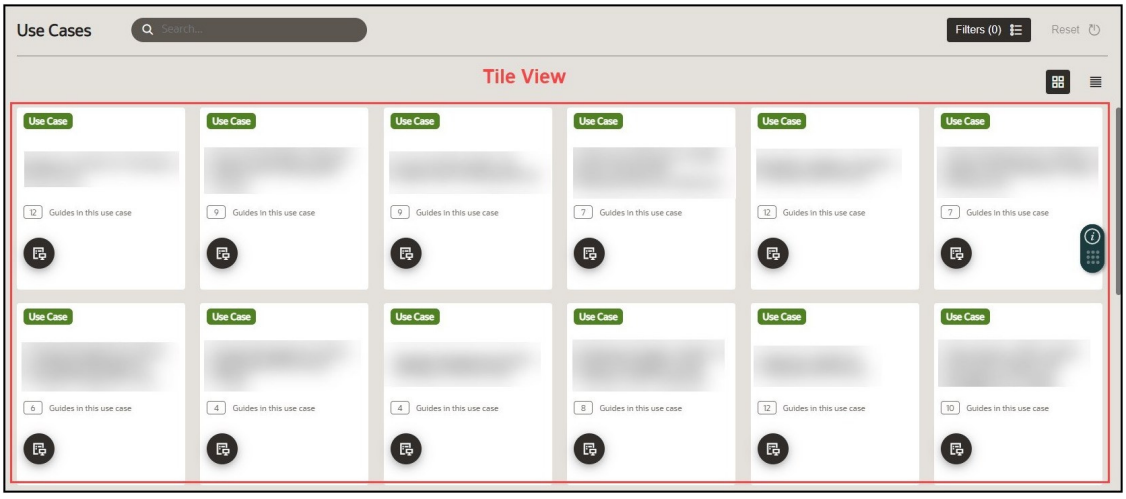
To see the complete list of Use Cases:

1. Select **View Use Cases**.



The **Use Cases** screen is displayed.
To switch between the views:

By default, all the Use Cases are displayed in tile view.



Use the **List View** icon ( ) and the **Tile View** icon ( ) to switch between your preferred views.

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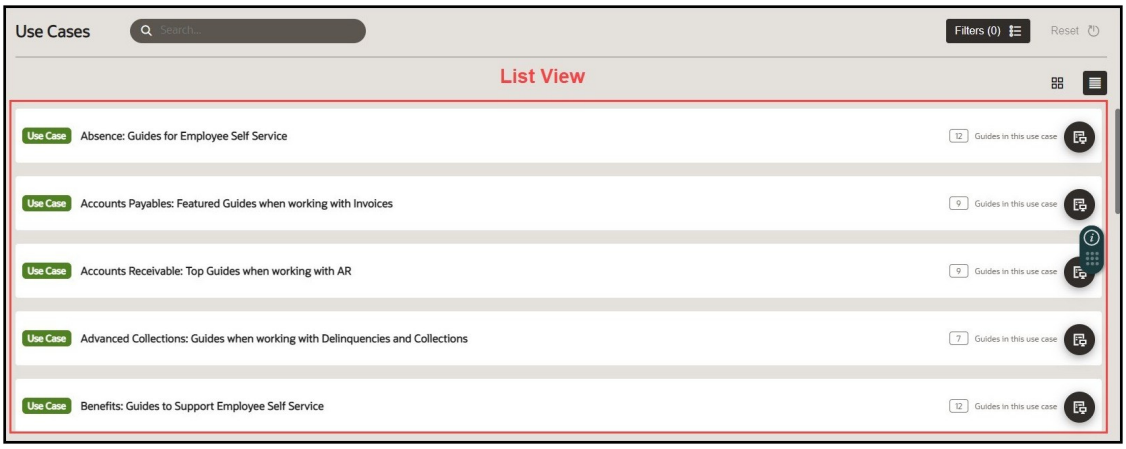
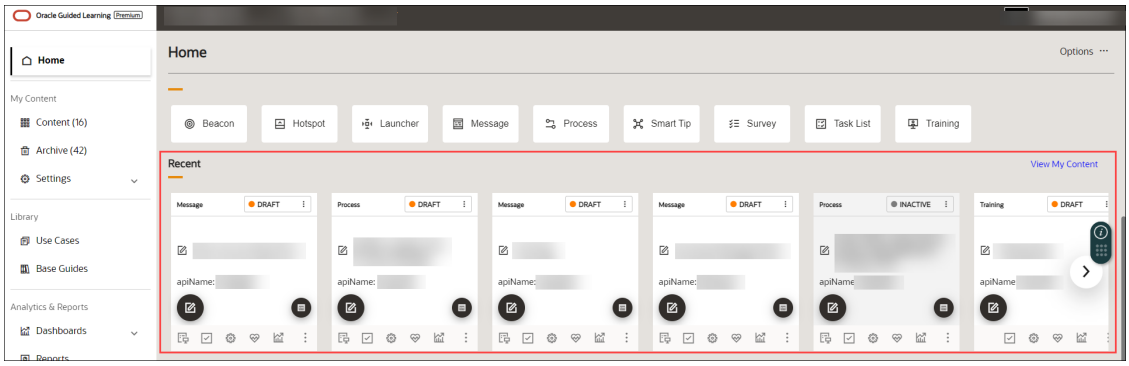


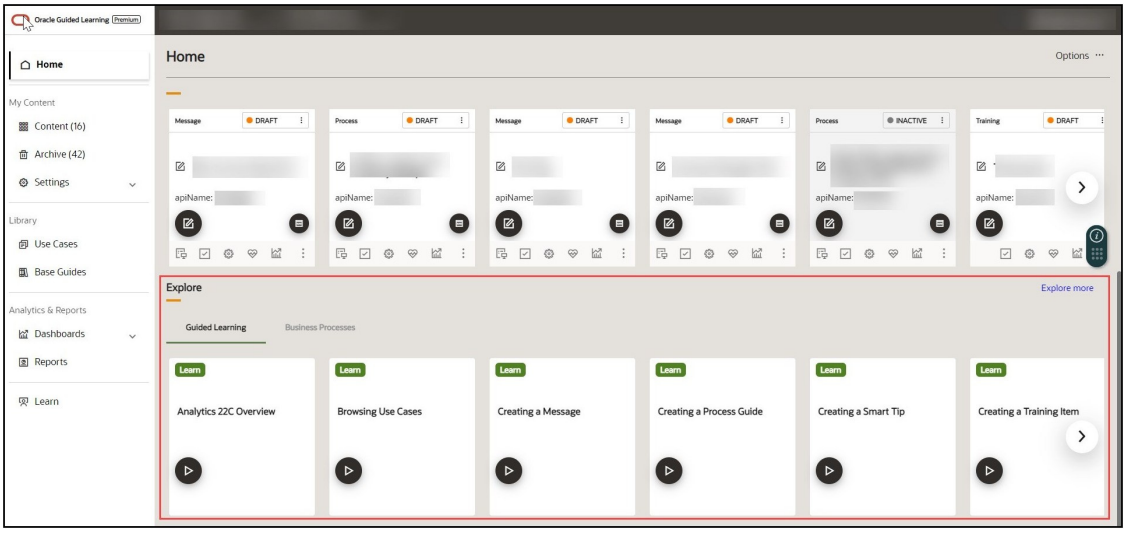
Recent Guides

The section displays guides that you have recently created or edited for quick reference.



Explore

This section contains links to learning resources, including microlearning videos on common OGL tasks as well as Business Process training on Oracle Fusion products that can be viewed or deployed to users.



OGL Microlearning Guides

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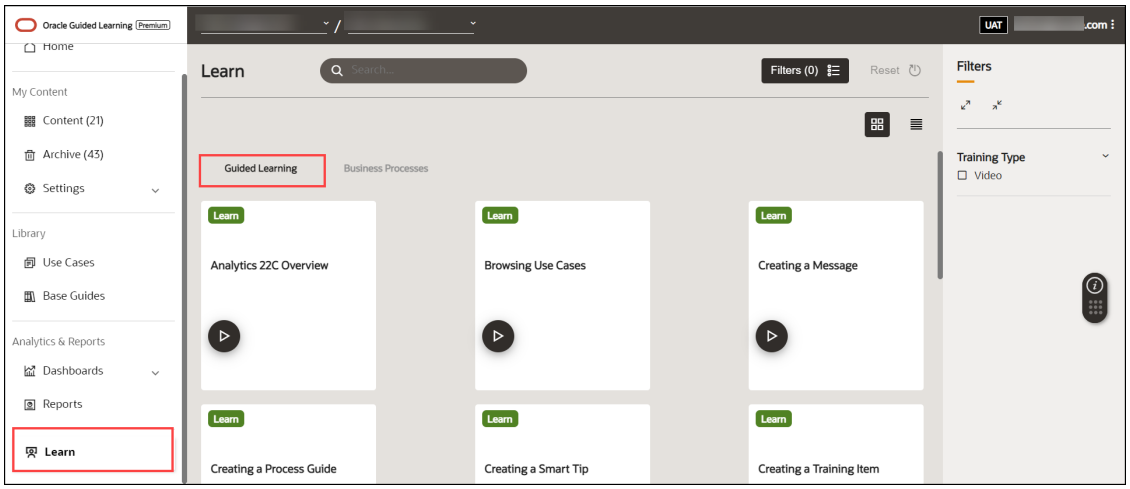
To support new console users and developers, OGL now provides a gallery of just-in-time “micro-learning” courses to learn more about basic OGL functionality. These training guides are available in the Learn section in the left navigation pane.

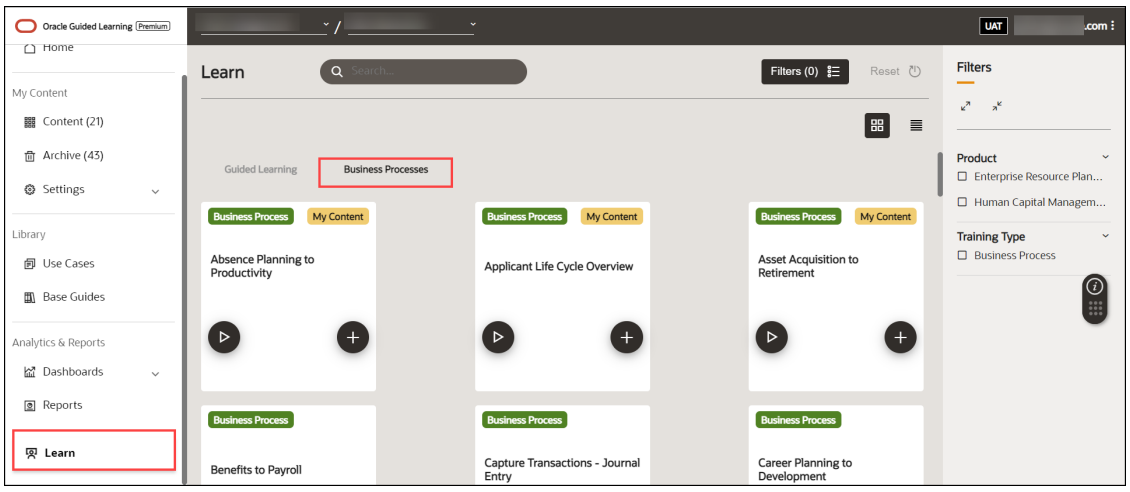
Click the Play button ( ) on any of the available training guides to view the training content in a modal.



Business Process Training Guides

OGL has introduced a library of Business Process Training guides to the OGL console that provides access to valuable Fusion product-related training content to enhance Fusion knowledge and adoption. The content for these training guides was curated from the Oracle Could Business Process Student Learning Subscription available on mylearn.oracle.com. Administrators and developers can select from this library of training guides and add to their content

To access these courses, go to the Learn section in the left navigation pane and select the Business Process tab.



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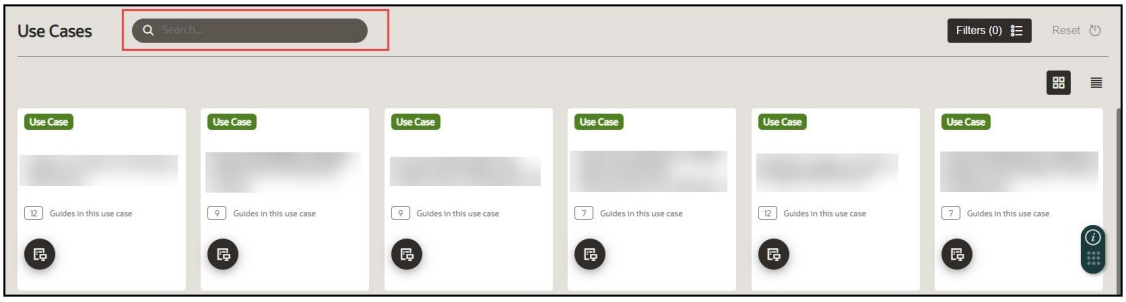
Searching and Filtering the Guide List

You can reduce the number of guides that you see by searching for a guide or filtering by content item in the left panel.

1. Searching guides: Enter a search term in the search box to find the guide-by-guide title.
2. Filtering by content items: Select a content item in the left panel to show only those guides.

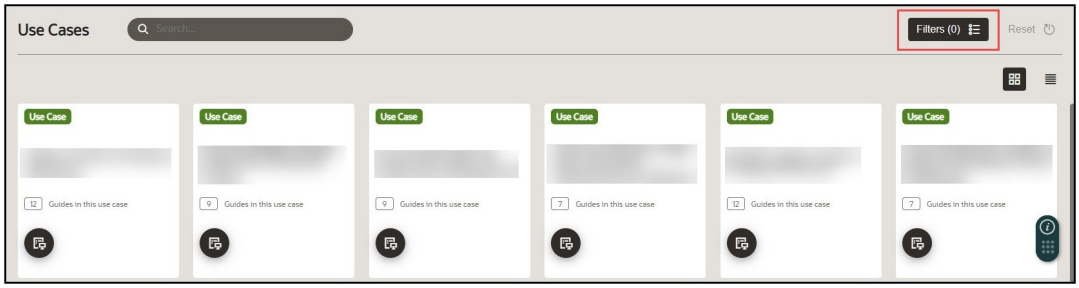
To search for a particular guide:

Use the **Search Box** to search for a particular guide.

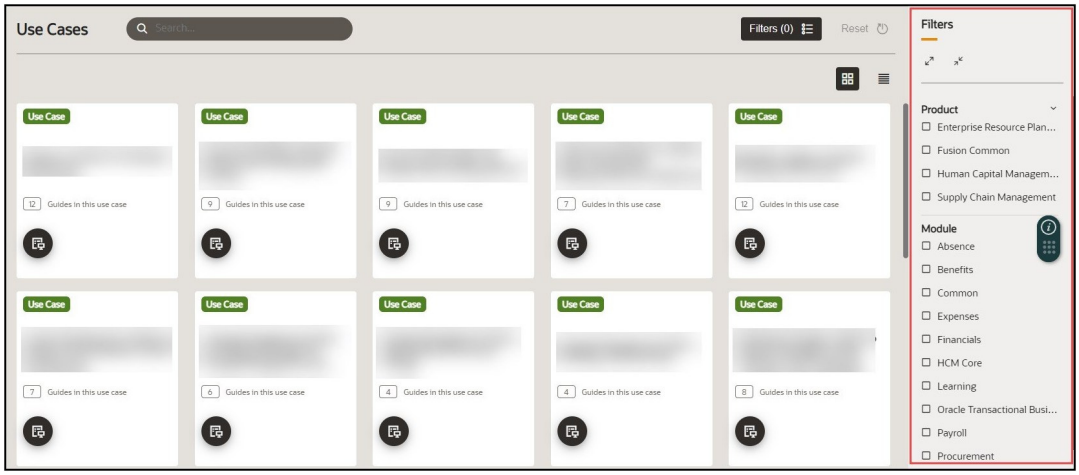


To filter the guides:

1. Select the **Filters** button.



The **Filters** slider menu appears. Use the checkboxes to filter the guides according to your preference.



To clear the filter, select the **Reset** button.

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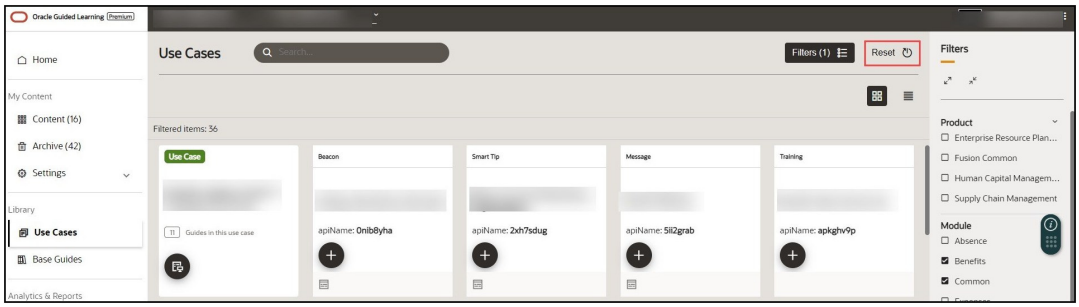
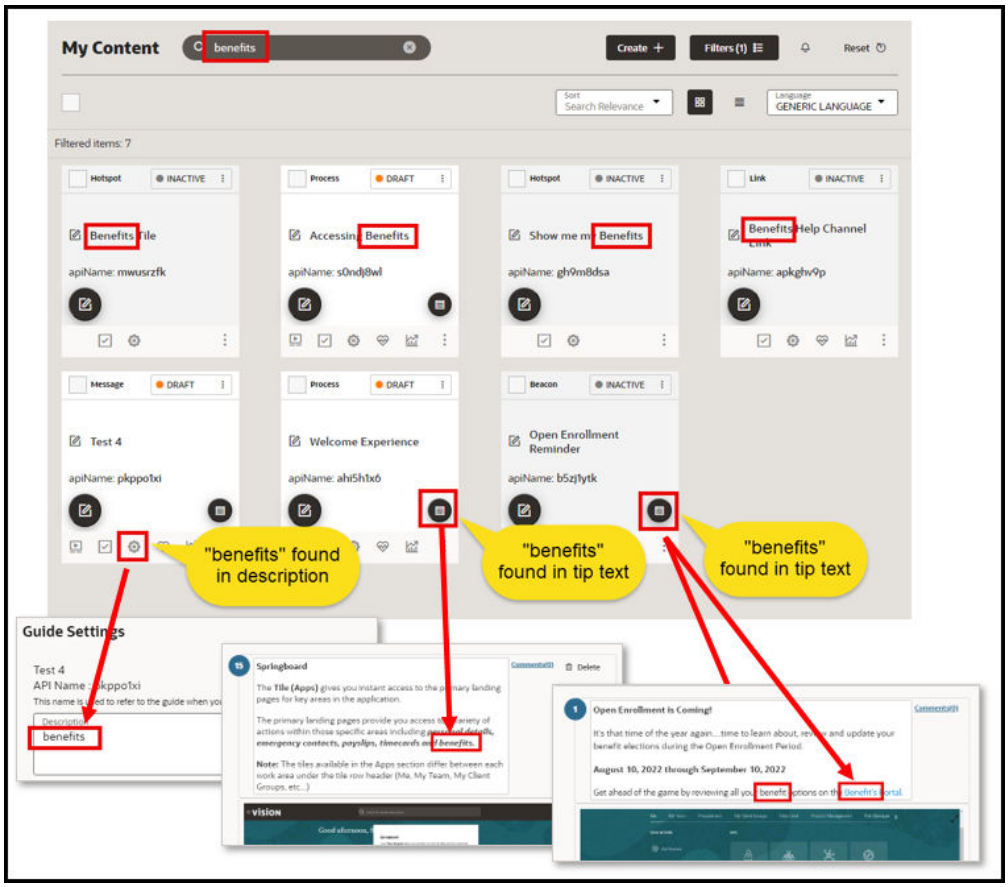


Console Smart Search

Console Smart Search functionality improves the quality of search results when searching for content items by keywords or search terms. When users search on a specific keyword or search term, Smart Search will not consider the current sort order and instead will return matching results based on **Search Relevance**. Search results will then be displayed in the following order:

1. Content items that match the search term in the **Guide Name**
2. Content items that match the search term in the **Description**
3. Content items that match the search term in the **Tip text**
4. Content items containing **URL(s)** that match the search term.

For example, a keyword search for “redwood” finds 5 content items, each containing the term “redwood” in the guide name. Note that the search results are sorted by **Search Relevance** as indicated in the Sort dropdown menu:



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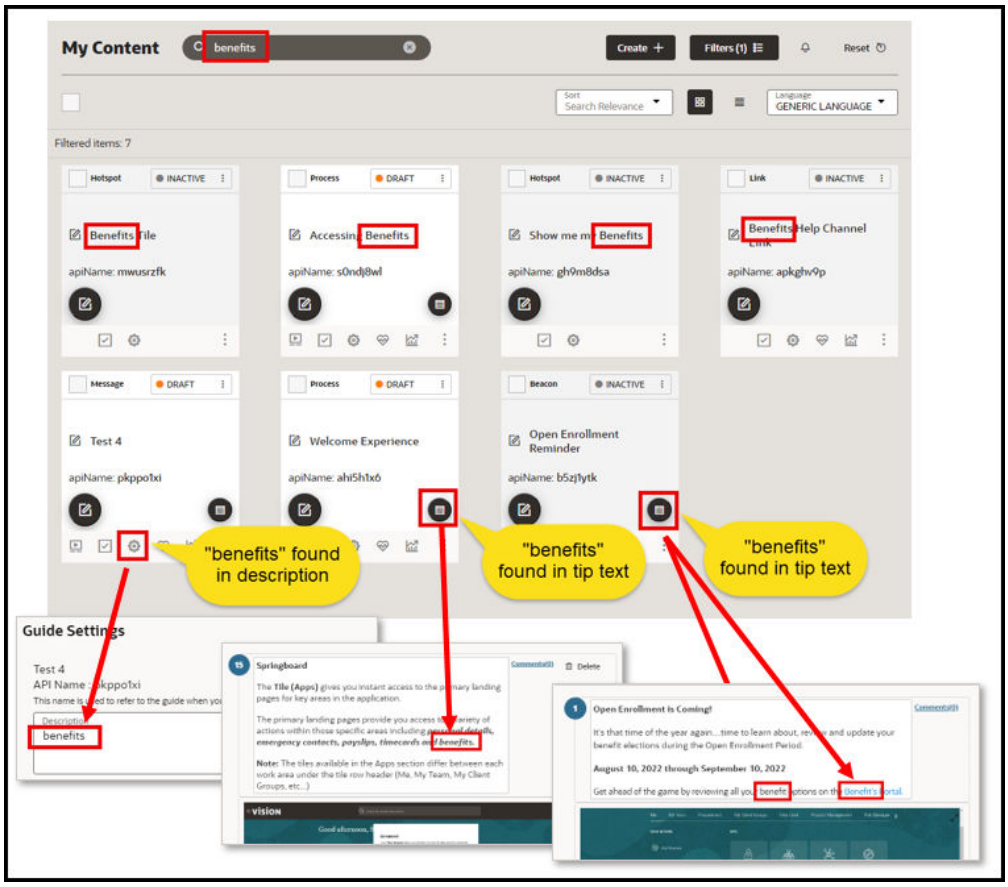
In this example, a keyword search for the term “benefits” finds 7 matching results. 4 of the content items contain “benefits” in the **guide name**, 1 content item contains “benefits” in the **description** the last 2 content items contain “benefit” within the **tip text**:



Additional considerations when using Smart Search:

Smart Search by date (expressed as “**MM/DD/YYYY**”) will return matching results from both the **Last Modified** date in guide settings and **Created At** date in version history.

Search for guides by date:

Results will include guide with date matching the **Last Modified** date.

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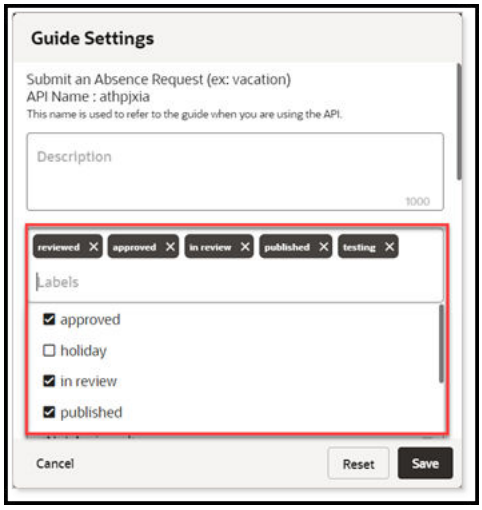


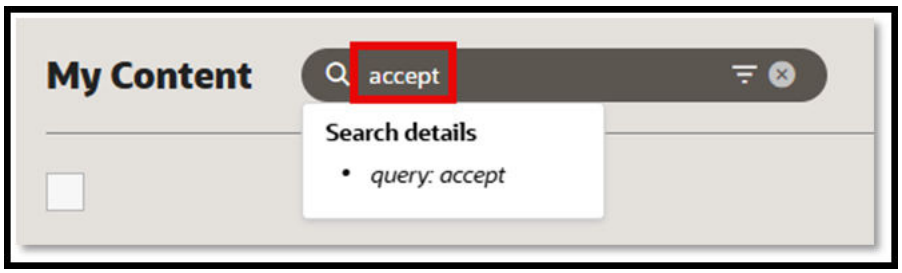
Results will also include guides with date matching **Created at** date in Version History.

Expected behavior - Date range search (for example: "*06/01/2024 - 08/30/2024*") is not supported in Smart Search at this time and will not return accurate results. Only single date strings (expressed as "**MM/DD/YYYY**") can be used.

- Smart Search results will include guides that have an 'exact match' and 'partial match' of the search term.

Smart Search functionality has been further enhanced to improve the quality and relevance of query results when searching for content items. This update includes an enhancement to the console UI adding a Search Details modal to allow users to specify multiple search criteria when searching for content items for more efficient content management.

In the console search bar, you can enter a keyword or search string to filter and sort content items by search relevance:



Or you can open Search Details to enter multiple search criteria:

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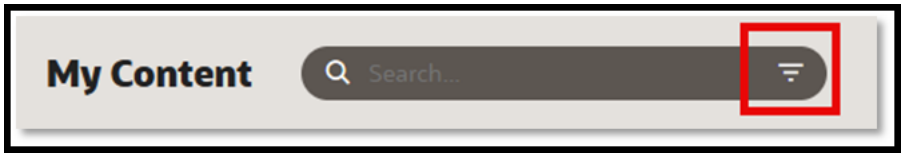
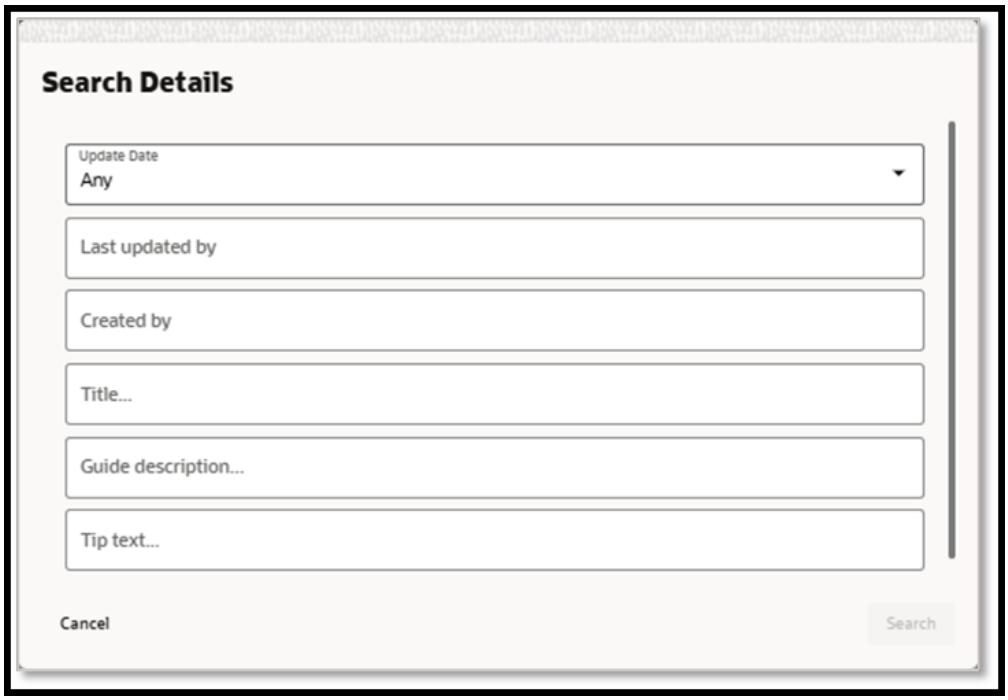


In the Search Details modal, you can search for and filter content items by one or more of the following search criteria.



> **Note**
>
> Entering multiple search criteria will apply an AND operator. For example, if you enter the following search criteria below, search results will display only those content items that were updated in the last 30 days AND contain “accept” in the guide title AND contain “test” in the description:

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Search string = “startDate: 10/10/2024 AND endDate: 11/09/2024 AND title: accept AND guideDescription: test”

User Management

Once your OGL account is created, you can add new users with different permission levels. The new users can create, publish, delete guides, edit content, view analytics, etc. We recommend you follow the **Least Privilege** principle when granting permissions to new OGL users, especially the permission to publish guides.

You can set up multiple types of users depending on the level of access you want each user to have. Each user is identified by their name, email address, and the permissions assigned to them.

Introduction to OGL Roles

Before you set up users in OGL, you should understand the roles and permissions that you can assign to a user.

> **Note**
>
> The roles discussed below only apply to the OGL Console and are not related to the application roles.

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Roles & Permissions

Viewer: Executive sponsors are the common target audience for this role which only requires the ability to see what guides exist and view the Analytics Dashboard.

Permission	Detail
Preview a guide	• Preview Guides
View Analytics	• View Analytics

Editor: The Editor role addresses users who only need to work with the copy/text in the guides and messages to end-users. This allows writers to be able to get into the system and provide content without exposing them to publishing and other mission-critical capabilities.

Permission	Detail
Access Content Editor	• Edit OGL item text via Content Editor
Manage Messages	• Create, Update, Clone, and Delete Messages

Developer: This role enables admins who should be working with the detailed features within individual guides, while not opening up system-wide settings that would affect all Editors and Developers.

Permission	Detail
Edit Guides	• Update OGL item name(s) • View Guide in Full Editor • Edit Guide, Video, Links, Tasks Lists via Full Editor • Edit Settings for Guide, Video, Links, Tasks Lists in Dashboard • Edit Activation Settings for Guide, Video, Links, Tasks Lists in Dashboard
Create Guides	• Create/clone OGL item(s)
Delete Guides	• Delete/recover OGL item(s)
Publish Guides	• Activate/inactivate OGL item(s) • Publish/unpublish OGL item(s) • Publish unpublished revisions of OGL item(s)
Edit Managed Guides	• Edit OGL items classified as managed by Oracle

Owner: Within each organization, there should only be 2-3 people with this level of access. The permissions included in this role enable the admin to make changes to the system that will affect every user and guide therein.

Permission	Detail
Manage Users	• Add/delete users from the appID • Assign/revoke user permissions
Manage Help Widget Settings	• Update the help widget sort order • Update the OGL Widget settings for development and production
Manage Display Groups	• Create, update, and delete display group(s)
Manage Roles	• Create, update, and delete simplified role(s)

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Permission	Detail
Manage Pages	• Create, update, and delete OGL pages for use in conditioning content in the library
Manage Products & Modules	• Create, update, and delete OGL Products and Modules which are used in OGL analytics and as content filters
Manage Training Types	• Create, update, and delete training type(s)
Manage Themes	• Can update the theme to any of the available themes in the OGL Console. • Can download the available Design Kit(s) in the appID • Can update the theme via the appID's Design Kit • Can upload modified Design Kit(s) to the appID
Change application settings	• Enable feedback • Manage feedback settings for development and production • Update the application(sub-account) name
Create Managed Guides	• Set a guide as a managed guide
Manage Comments	• Manage comments in the full editor
Reset end-user usage data	• Reset user analytics data
Manage Cloud Configuration	• Manage Cloud Configuration in the OGL Console
Manage Oracle Content	• Manage **Oracle Content** in the OGL Console.
Batch Update Guides	• This feature enables you to update guides in batches.

Assigning Roles and Permissions

You can assign all of the permissions within a role to a user, or assign specific permissions. Depending on your approach, the role icons will change so you can quickly see which roles and permissions a user has:

= ALL of the permissions within the OGL role are assigned to the user.

= SOME of the permissions within the OGL role are assigned to the user.

= NONE of the permissions within the OGL role are assigned to the user.

- To revoke all user permissions for a particular OGL role simply click on or to make it
- To assign all user permissions for a particular OGL role simply click on to make it
- To assign some user permissions for a particular OGL role simply click on , then proceed to assign/revoke the required permissions

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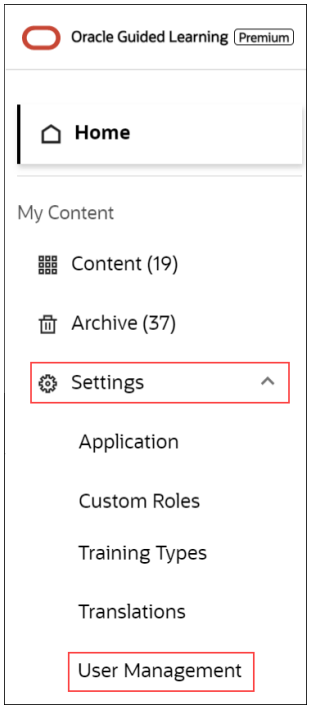
Adding Users

> **Note**
>
> Only the identified client-side OGL Admins have the access to add additional users to the account.

Use the user's email address to add them to the OGL.

To add users:

1. On your OGL console's navigation menu, select **Settings** > **User Management**.



   The **User Management** modal window appears.

2. Select the **Add Users** button.

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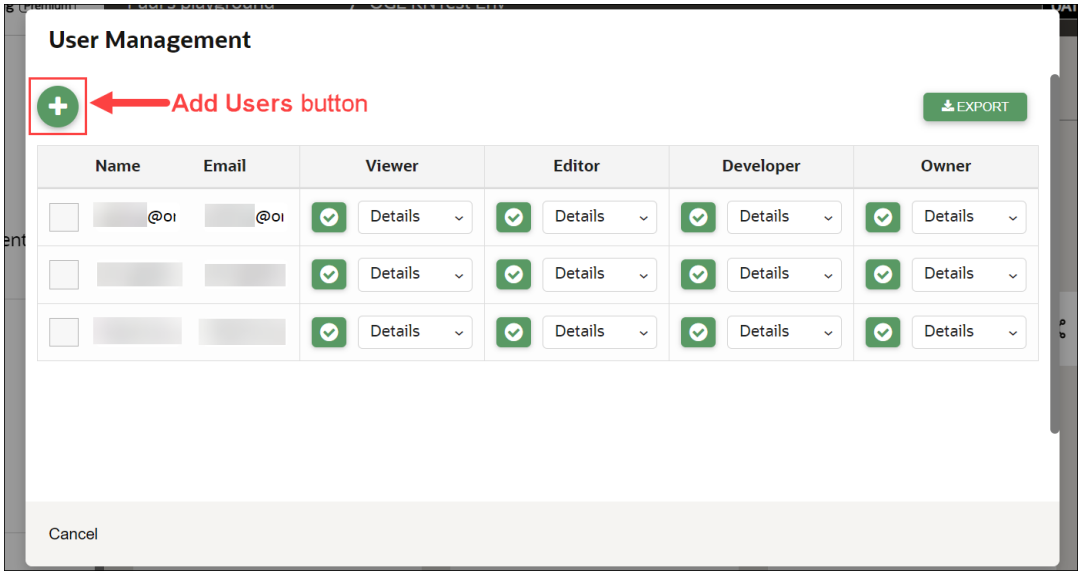
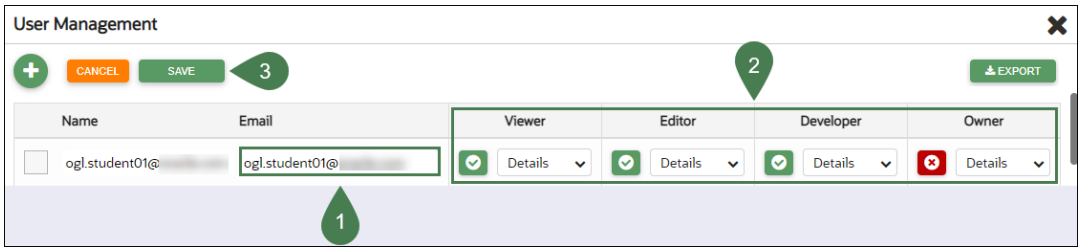


3. 1 Enter the new user's email address in the **Email** field, 2 assign the **user permissions**, then 3 select **Save.**.



> **Note**
>
> See the above *"**Assigning Roles and Permissions**"* section to learn more.

4. Select **Close (X)** to exit the **User Management** modal window.

Removing Users

To remove Users:

1. Navigate to the **User Management** modal window.
2. Check in the checkbox at the beginning of the line that lists the user you want to remove. Once checked in, the **Delete** button appears.

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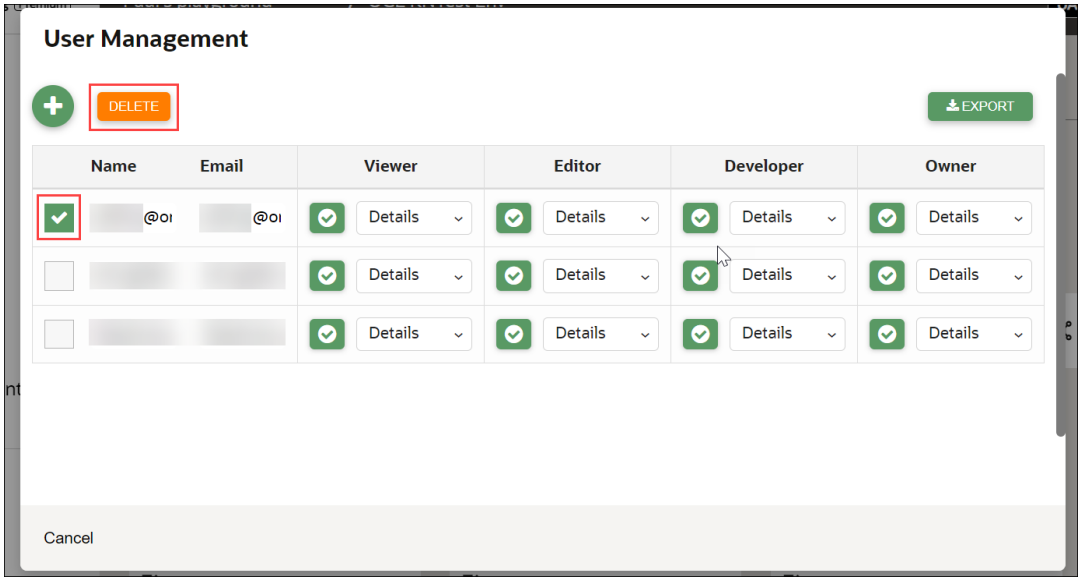
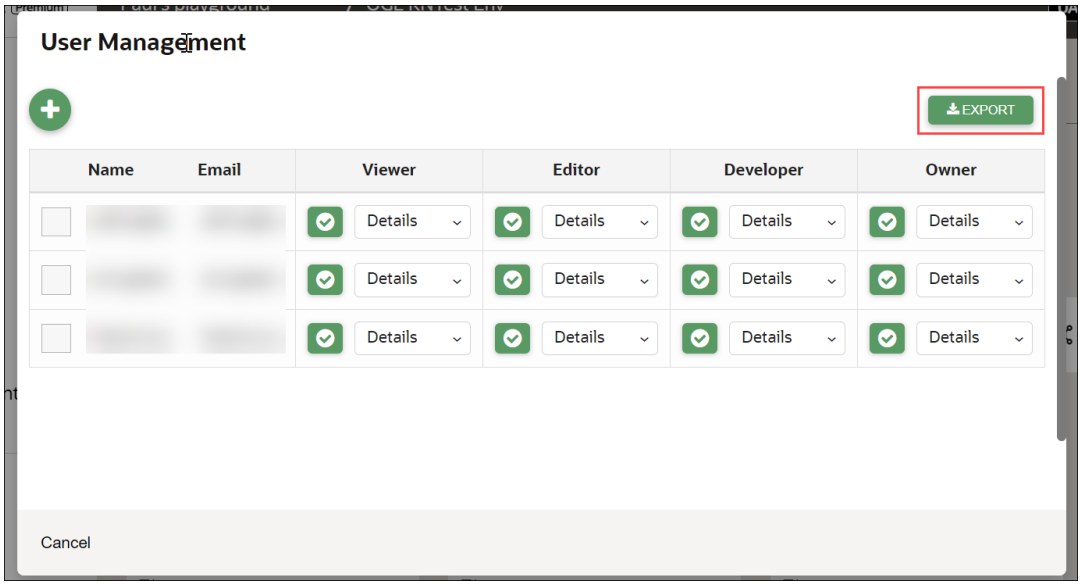


3. Select the **Delete** button.
   The user is now removed from OGL.

Exporting the OGL User Matrix

You can export the OGL user matrix in "***.xlsx***" format with a single click/selection.

1. Navigate to the **User Management** modal window.
2. Select the **Export** button (EXPORT) to download the user matrix.



The browser now downloads the ***.xlsx*** file.

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Your OGL App ID

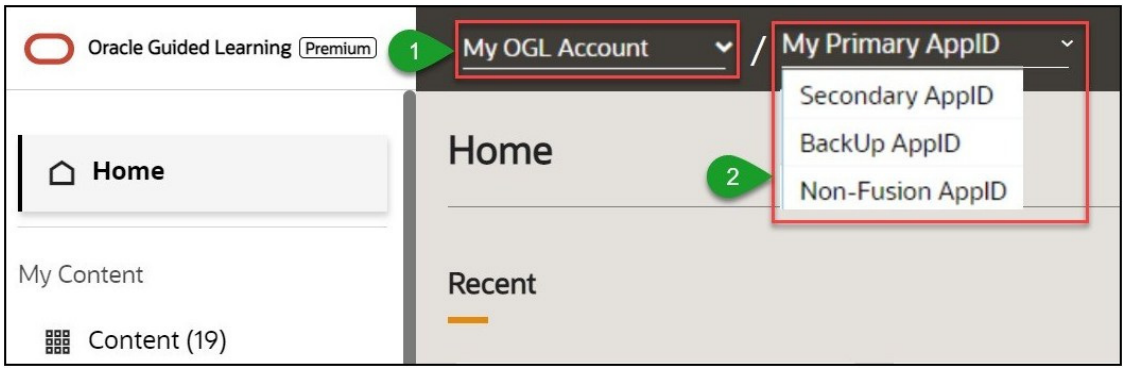
Your OGL account is always associated with at least one **Application ID** (**App ID**).

An **App ID** is a logical grouping of guides (contents). Each App ID has its own dashboard and set of guides. If you have multiple App IDs, switch between your App IDs in the setup script of your Fusion application to view all the corresponding guides linked to that App ID.

If you want to integrate OGL into multiple applications, you should procure individual App IDs for each application. Contact your Oracle Account Manager for additional App IDs.

Know Your OGL App ID

Your OGL console consists of 1 an account and 2 one or more app(s), as shown below:



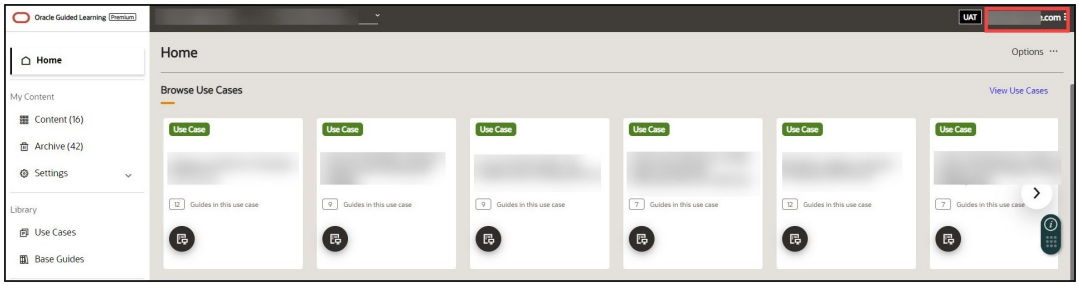
Each app has a **22-character unique Application ID** (or **App ID**) that enables the mapping of the **Help Widget** to your app. You will need to know this **App ID** to enable OGL.

Find your App ID

You can find your **App ID** in three ways.

Method 1:

1. On the **OGL Console** homepage, select the **User Menu** at the top-right corner.



2. On the **User Menu,** select **About**.

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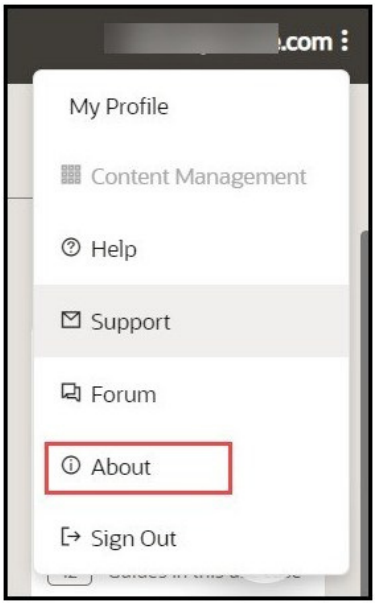
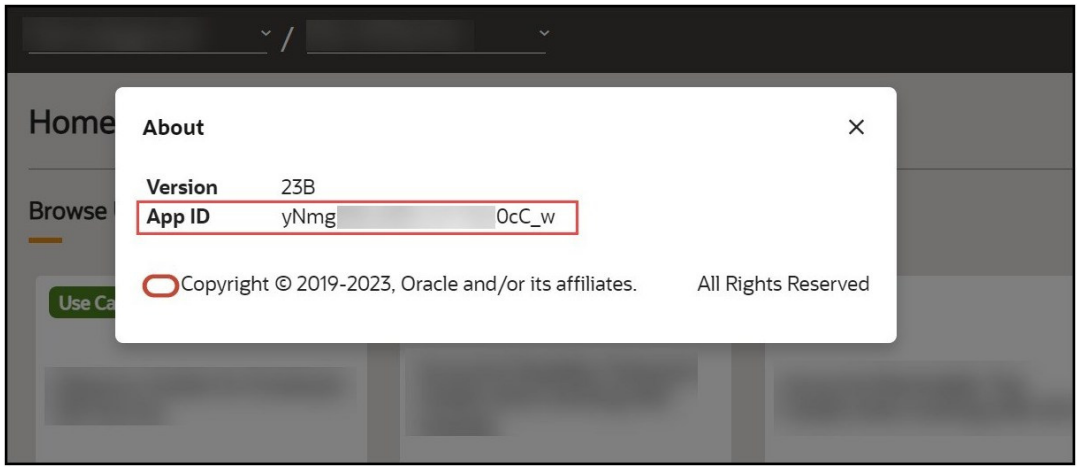


The **About** information pops up. You can find the **App ID** as well as the version number here.

Your **App ID** looks like this: "**yNmgDxxxxxxxxxxxx0cC_w**".



Select the **Close** icon (x) on the top right corner to close the pop-up window.

Method 2:

1. On your OGL console's navigation menu, select **Settings** > **Application.**
   The **Application** modal window is displayed.
2. On the **Application** modal window, scroll down to the **Details** section.
   You can find the **Application ID** here.

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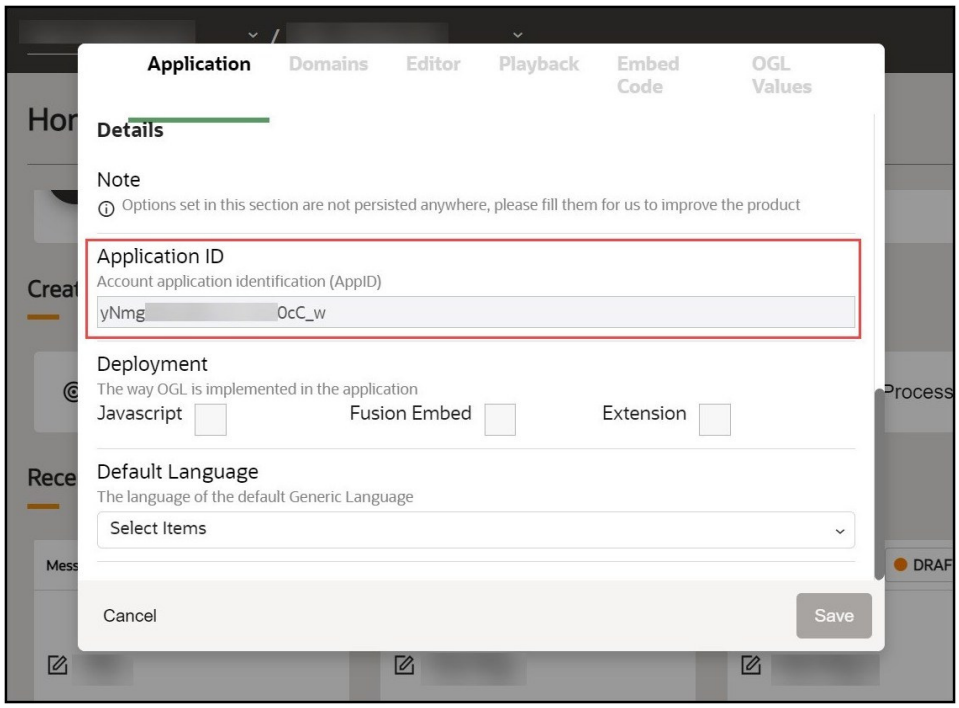
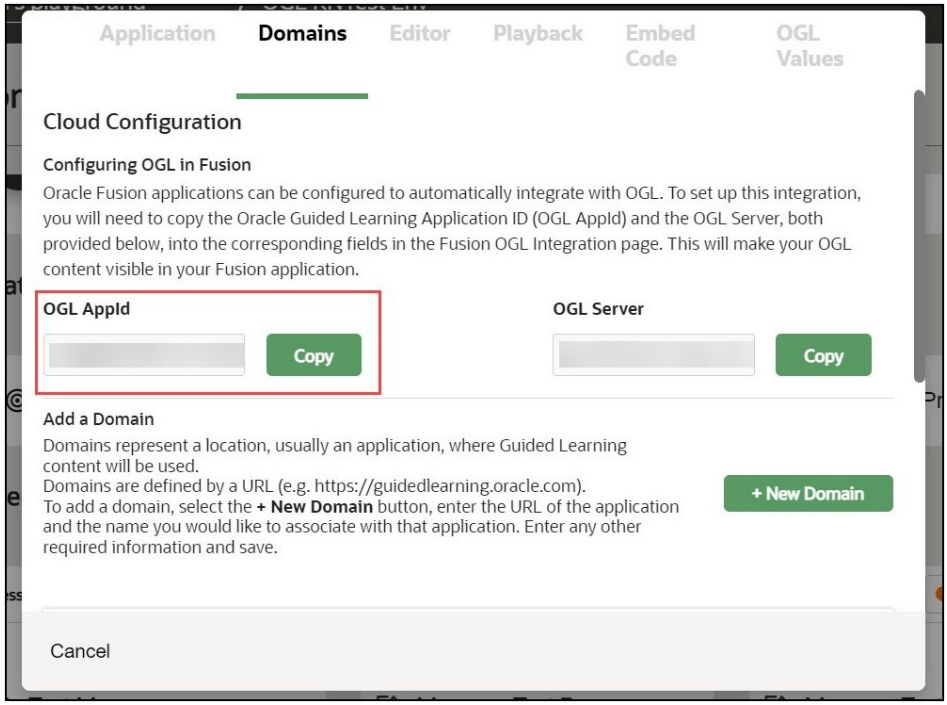


Select the **Cancel** button at the bottom left corner to close the modal window.

Method 3:

1. On your OGL console's navigation menu, select **Settings** > **Application** > **Domains**. The **Domains** modal window is displayed.
2. Find your OGL **App ID** here.



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> **Tip**
>
> Use the **Copy** button to copy the **App ID** to your clipboard, whenever you want to record it.

3. Select **Cancel** to close the **Domains** modal window.

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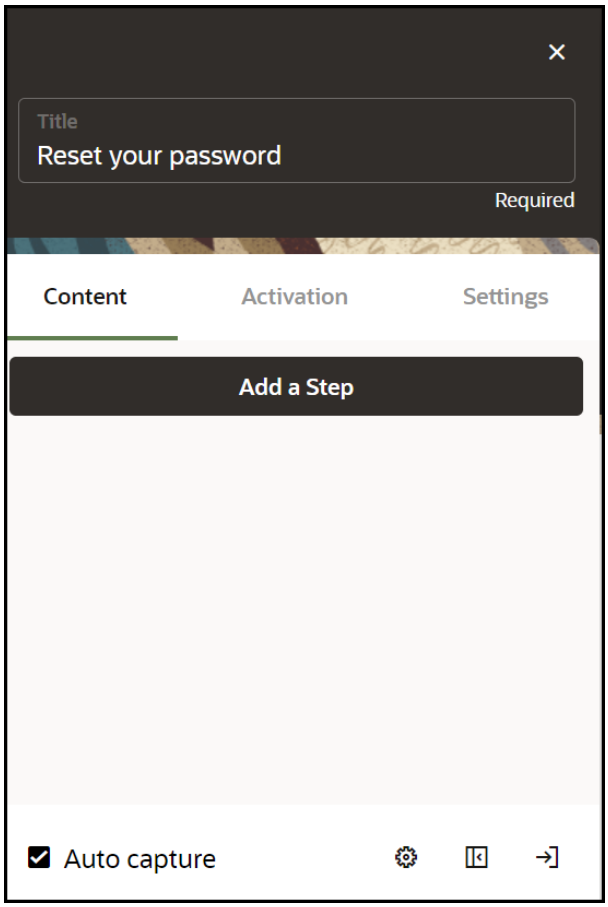
3
Working with the Editors

The OGL Editor

The **OGL Editor** serves as the primary tool for creating various guides and formatting content.



> **Important**
>
> - To use the OGL Editor, it is necessary for your browser to have the **OGL Extension** installed.
> - In order to access the OGL Editor, your profile must have **Developer Rights/ Permissions** enabled.
>
> Learn more about **User Management**.

Use the OGL editor to create process guides, Smart Tips, messages, and other OGL items. You can access the OGL editor by creating a new guide or from an existing guide. Guide creation is covered later in this document.

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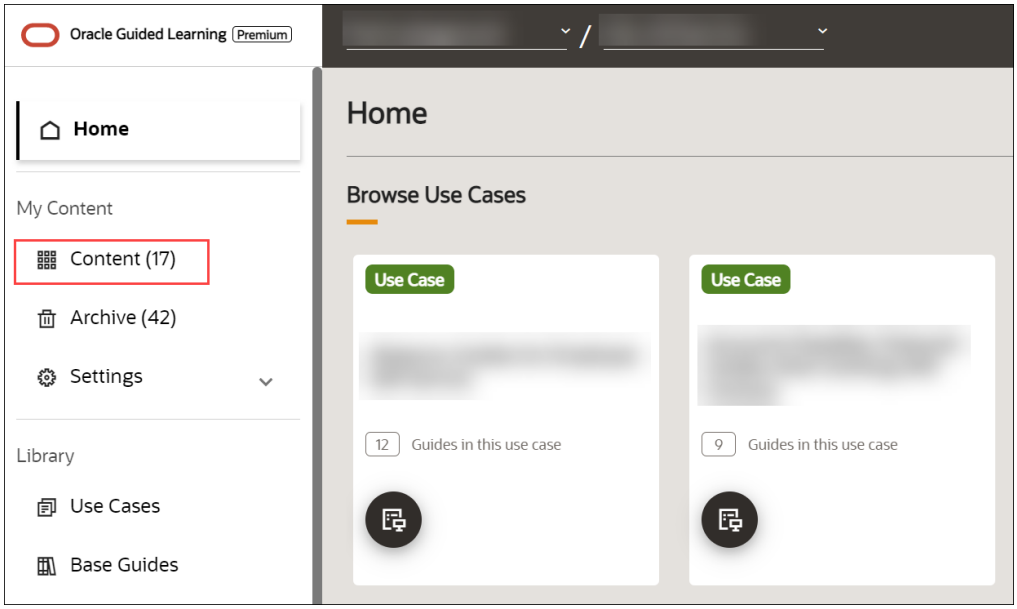
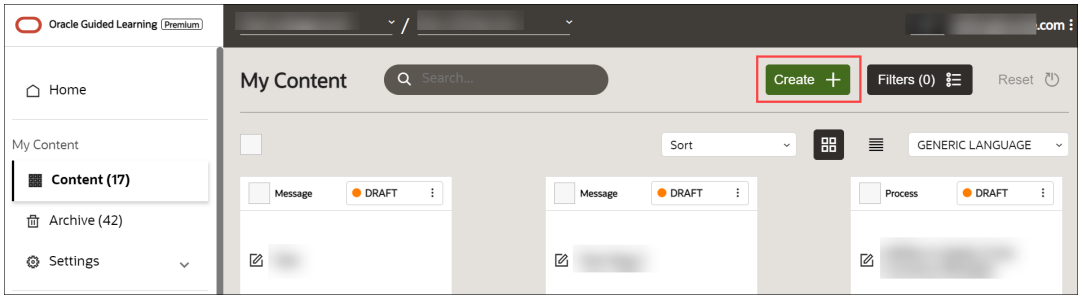
To access the OGL Editor (To Create a New Guide):

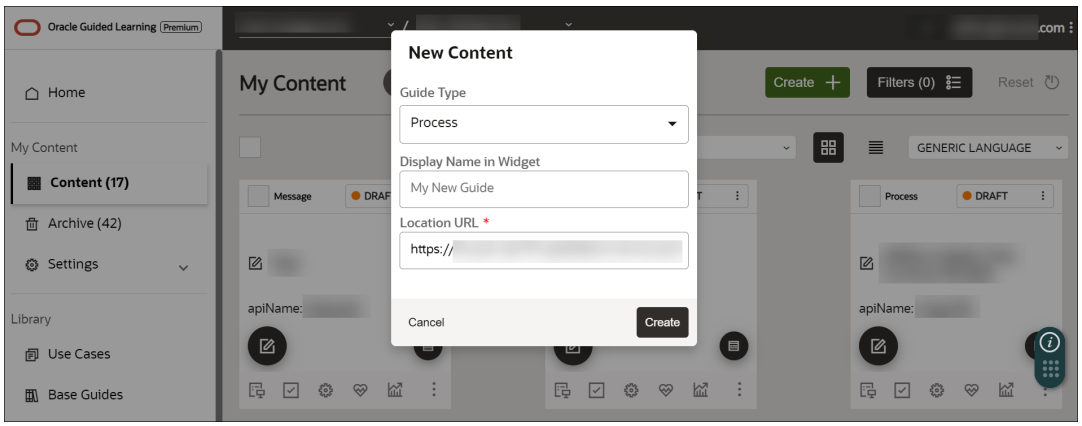
1. On the Main Navigation Panel, select **Content**.



2. On the **My Content** screen, select the Create + button.



The **New Content** modal window appears.



3. Select the guide type from the **Guide Type** dropdown.

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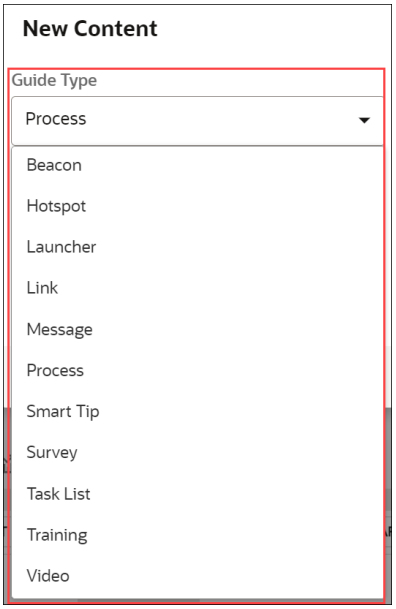
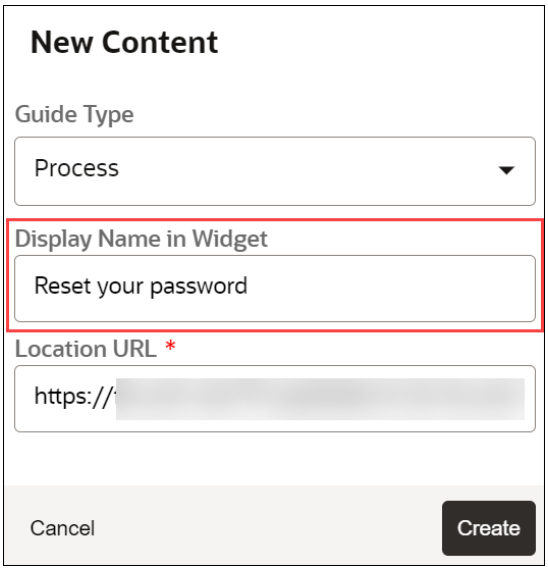


4. Enter the desired display name of the new guide.



5. Enter your application's URL in the **Location URL** field.

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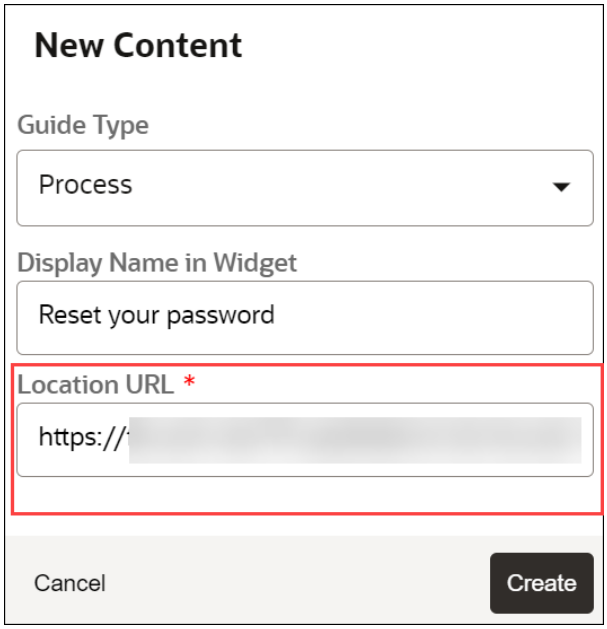

6. Select **Create**.

   The Guide Editor launches.

   The **OGL Editor** opens in a new tab. The editor appears as an overlay on your application.

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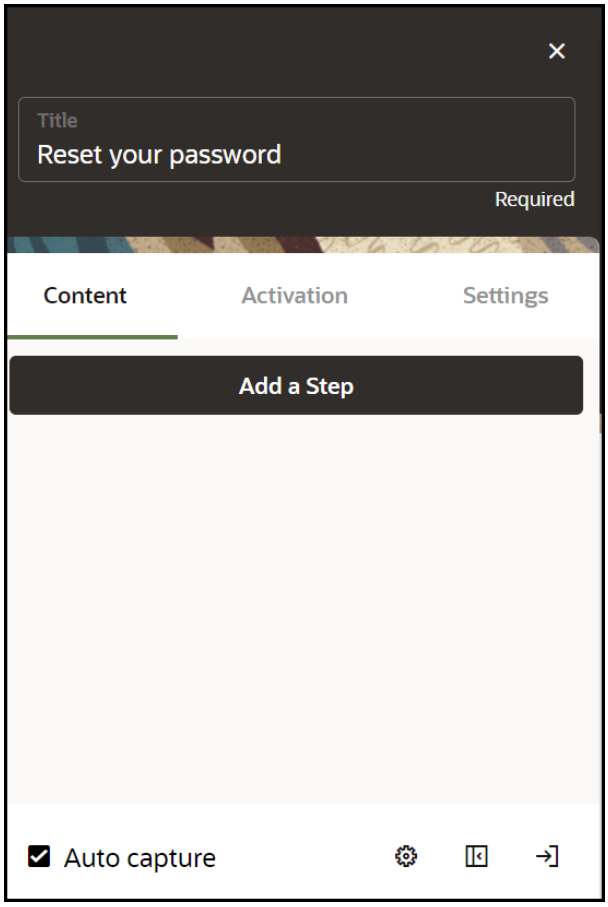
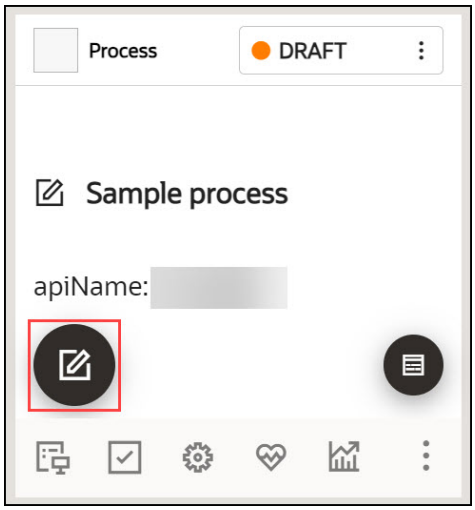


To access the OGL Editor (To Update an Existing Guide):

1. Select the **Editor** icon ( ) on the guide you want to edit.



The **OGL Editor** opens in a new tab. The editor appears as an overlay on your application.

To learn more about creating guides, kindly access the link "Creating OGL Content".

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The Content Editor

The **Content Editor** enables you to make simple text edits to guides without the need to access the OGL Editor. OGL administrators can provide you access to the Content Editor only (if required) for reviewing and simple updates. All users can make the following changes to a Guide from the Content Editor:

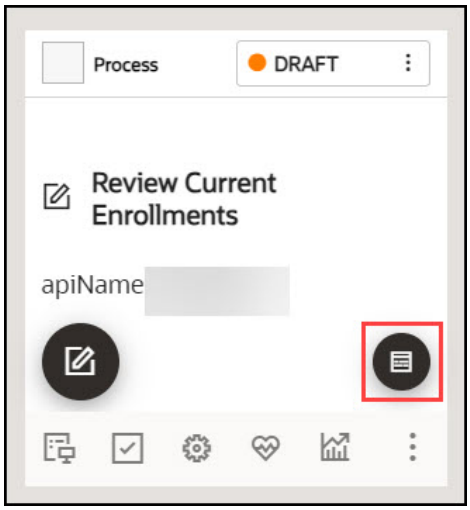
1. Edit guide step text.
2. Translate guide step text in a connected guide.
3. Add links to a guide step.

> **Important**
>
> In order to access the **Content Editor**, your profile must have **Editor Rights/ Permissions** enabled.
>
> Learn more about **User Management**.

To access the Content Editor:

1. Select the **Content Editor**

   ( ) icon on the guide tile.



   The Content Editor dialog is now displayed.

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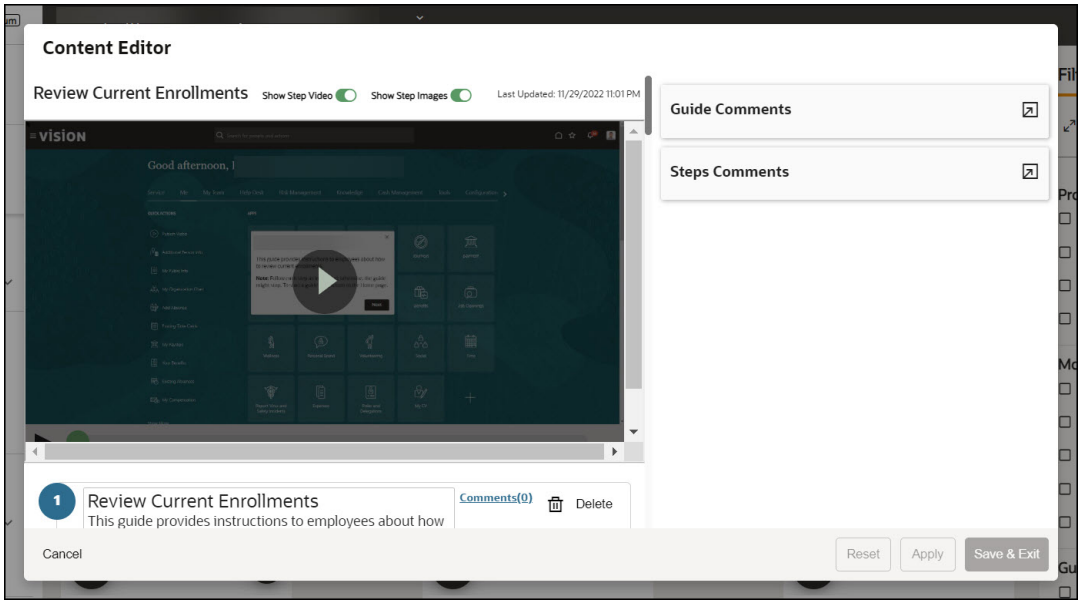

To learn more about the Content Editor and its usage, kindly access the links "The Content Editor" and "Editing Guide Content".

Screenshot Masking

OGL developers often need to capture screenshots of their guides for various purposes, including documentation. Sometimes fields containing sensitive information or data may be visible in these screenshots posing a privacy risk. To address this concern and to enhance user privacy, we have added a new feature and functionality to the OGL Content Editor that allows users to quickly mask sensitive fields and make other visual manipulations to guide screenshots.

New in OGL 25B, the OGL Content Editor now features a screenshot masking tool that allows users to quickly blur sensitive areas of the screenshot to better safeguard data and enhance privacy. This feature includes additional functionality that allows users to draw, edit, and reposition element selectors to improve visibility of the target element. With this feature, developers can also upload, download, and save screenshots which adds more efficient options for content management.

Accessing the Screenshot Masking Tool

1. From the My Content page, select the **Content Editor** button on the guide tile.

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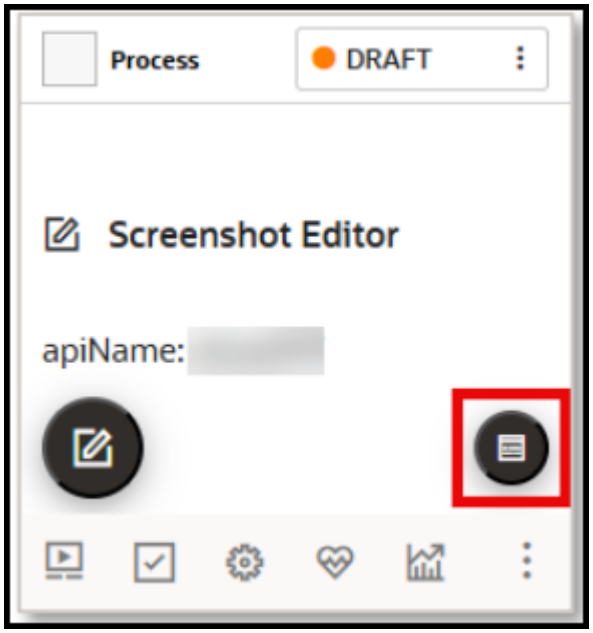
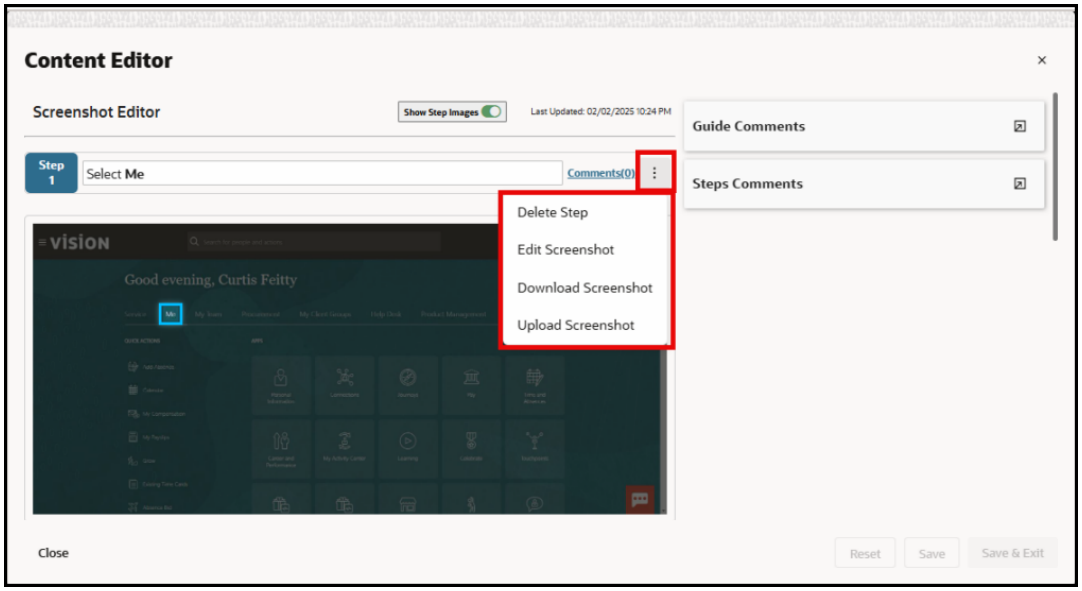


2. In the Content Editor modal, select the **Step options**… (⋮) button next to the guide step you wish to edit to open the Step Options menu.
3. Select **Edit Screenshot** from the menu.



> **Note**
>
> To edit a screenshot, you can also select the Enlarge Screenshot (⤢) button in the top-right corner of a screenshot preview to expand the screenshot to full screen.

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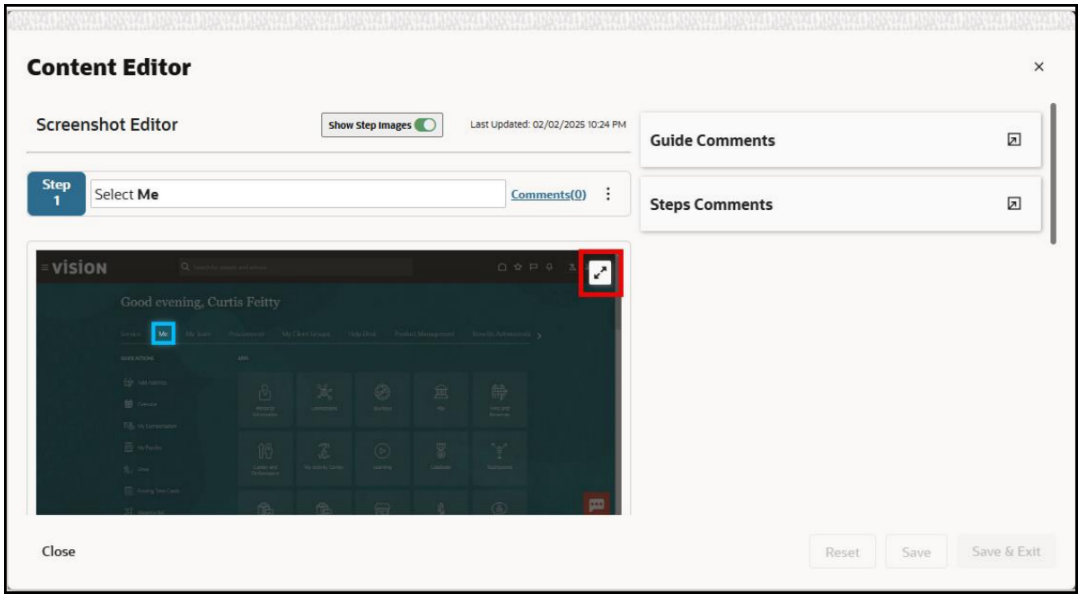
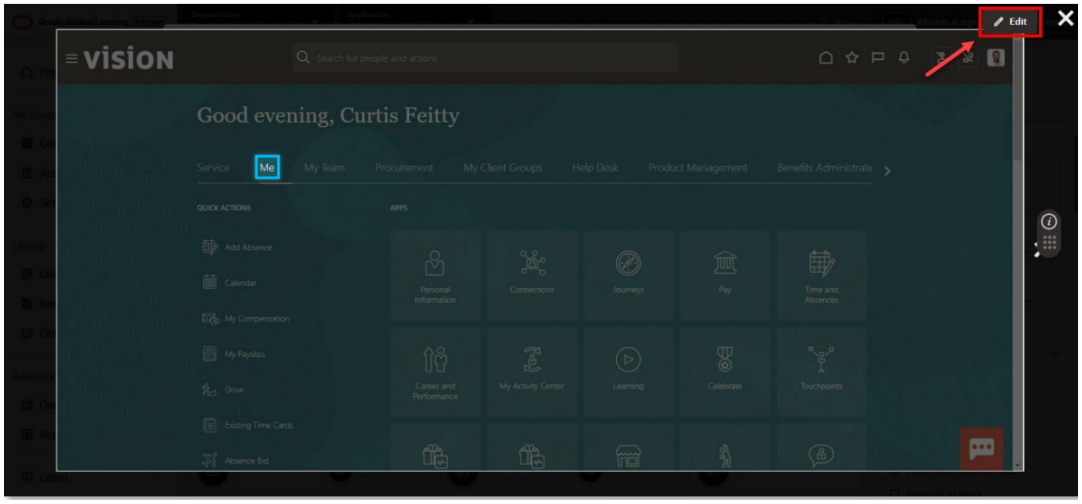


4. Select the **Edit** (

) button in the top-right corner of the screenshot to open the editing toolbar.



A screenshot editing toolbar opens on the right side of the screen.

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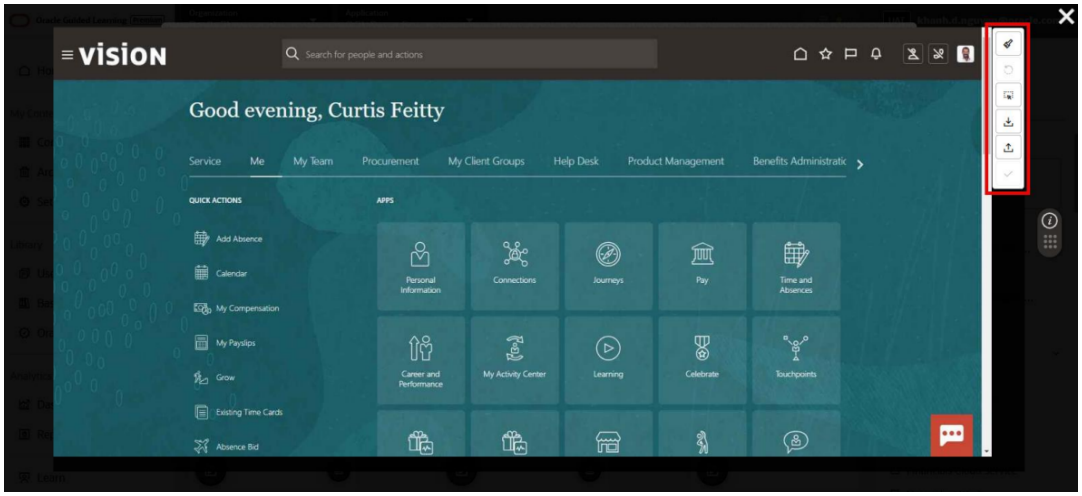
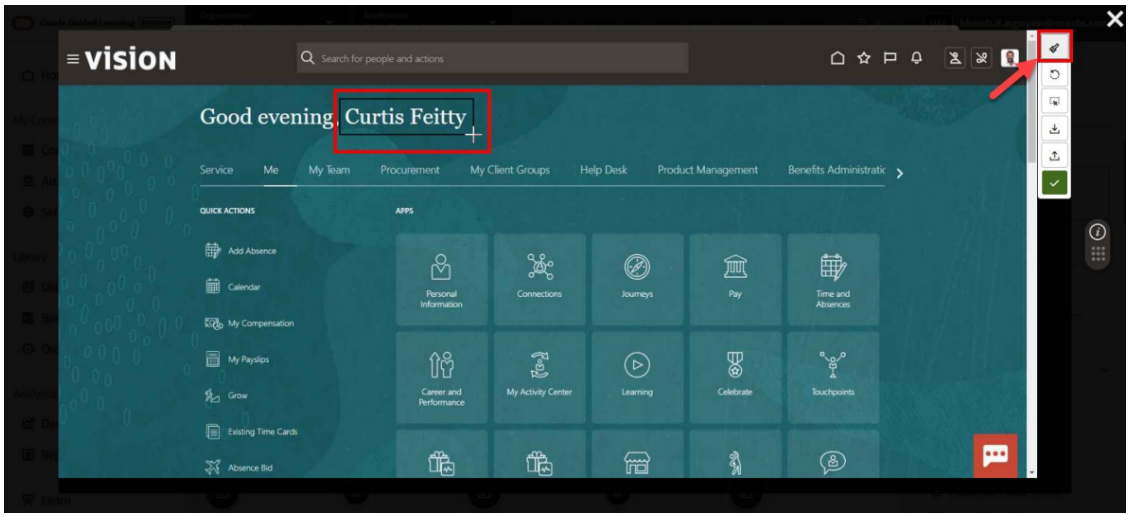


Using the Blur Tool

To mask or blur an area of the screenshot, select the Blur (

) button in the toolbar, then click and drag a box around the area or element you wish to blur.



The selected area will now be blurred. The default value of the blurring effect is set at 6. To adjust the amount of blurring, select the blurred element to open the Blur slider. Click and drag the slider to adjust the amount of blurring effect.

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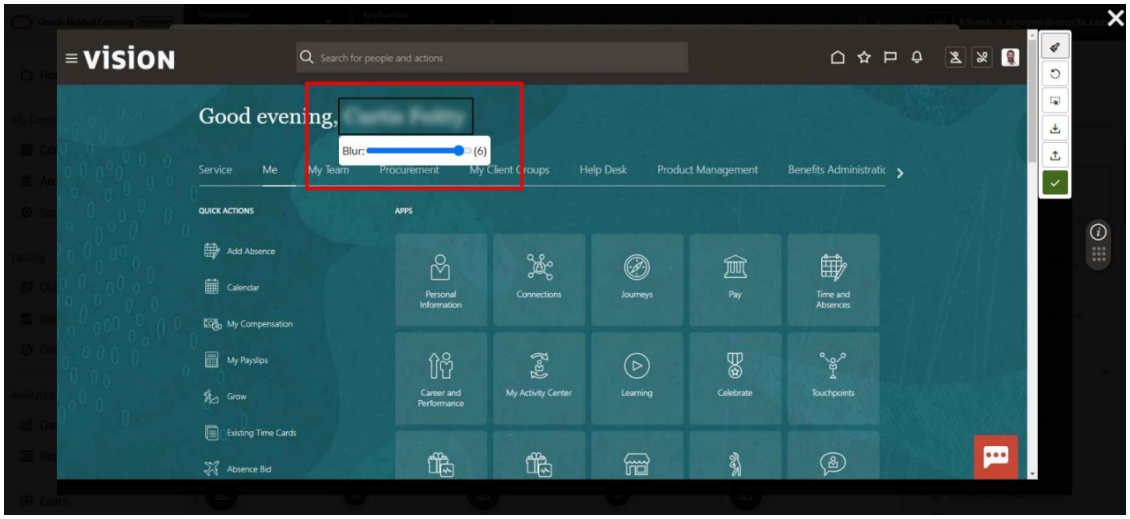
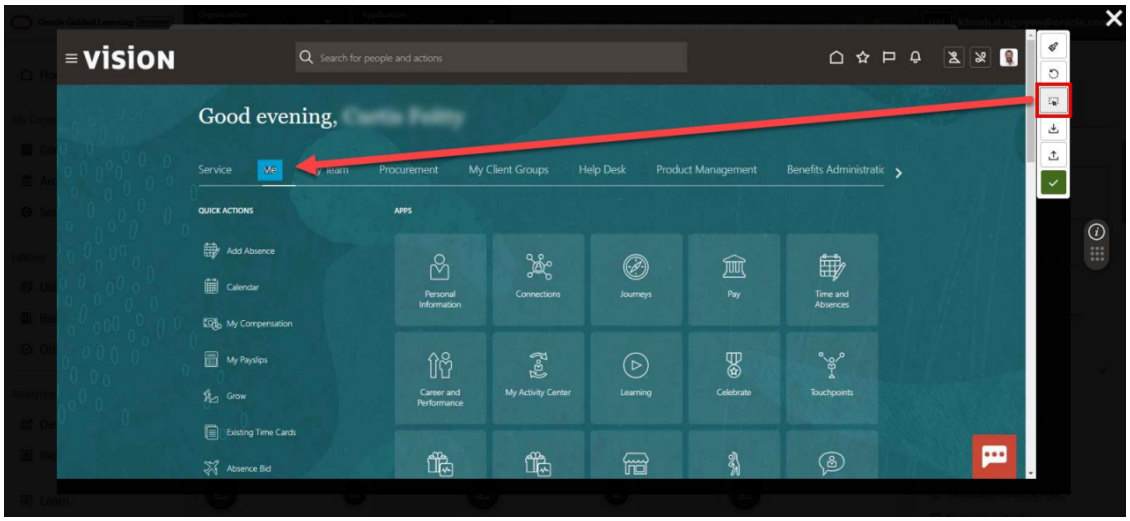


> **Note**
>
> To blur other elements on the page, simply click and drag a box around the desired element and adjust the settings, as needed.

Draw/Edit Selector

To draw or edit the border around the selector, select the Draw Selector ( ) button in the Screenshot Editor toolbar. If applicable, blue border will appear around the current element selector. You can move the position or adjust the size of the selector border by clicking and dragging the blue border.



Saving or Reverting the Screenshot

Once you've made the necessary changes to your screenshot, you can **save** your changes or **reset** the screenshot to its previously saved state.

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To save your changes, select the **Save** ( ) button on the toolbar. This will replace the previous screenshot with the newly updated screenshot. This will also save a new version of the guide in the Version History.

To discard your changes and revert the screenshot to its previously saved version, select the **Reset** ( ) button on the toolbar.

> **Note**
>
> The Reset button does not function as an “Undo” action. For example, if you have applied 2 blurred areas to a screenshot without saving, selecting Reset will remove both blurred areas and restore the screenshot to its previous version.

Downloading or Uploading the Screenshot

To download a copy of the screenshot to your file system as a JPG image file, select the Download ( ) button. The file will be downloaded to your default Downloads folder.To upload a screenshot image, select the Upload ( ) button on the toolbar and browse to and select the image file.

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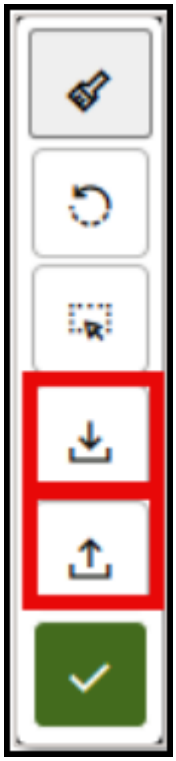

Known Issues/Expected Behavior

- **Download/Save functionality**:
  If developers attempt to download/edit an image from a different server (such as collections, Use Case library, Base Guide library, or imported guides from one tenancy to another), the action will be blocked, and an error message will appear, indicating that the image must be recaptured. Therefore, developers will need to recapture the screenshot before they are able to download or save it.
- **Upload functionality:**
  The maximum file size of the screenshot image is 1MB (this is subject change). If the developers attempt to upload an image exceeding this file size limit, the upload will not be allowed, and the user will receive an error message.

> **Note**
>
> File upload is currently supported only for jpg format.

Screenshot Capturing for Translated Content

The screenshot capture functionality allows content developers to capture and/or upload screenshots for translated content and blur them as well. Allows developers and administrators to present screenshots in their translated languages, providing a more helpful experience for end-users consuming multi-language OGL content.

Previously, when OGL content was translated, screenshots would render only in the original Generic Language, which did not accommodate customers with specific language requirements. This enhancement to the OGL console now allows the Full Editor to be accessible from translated guides in the language folders, which enables content developers to

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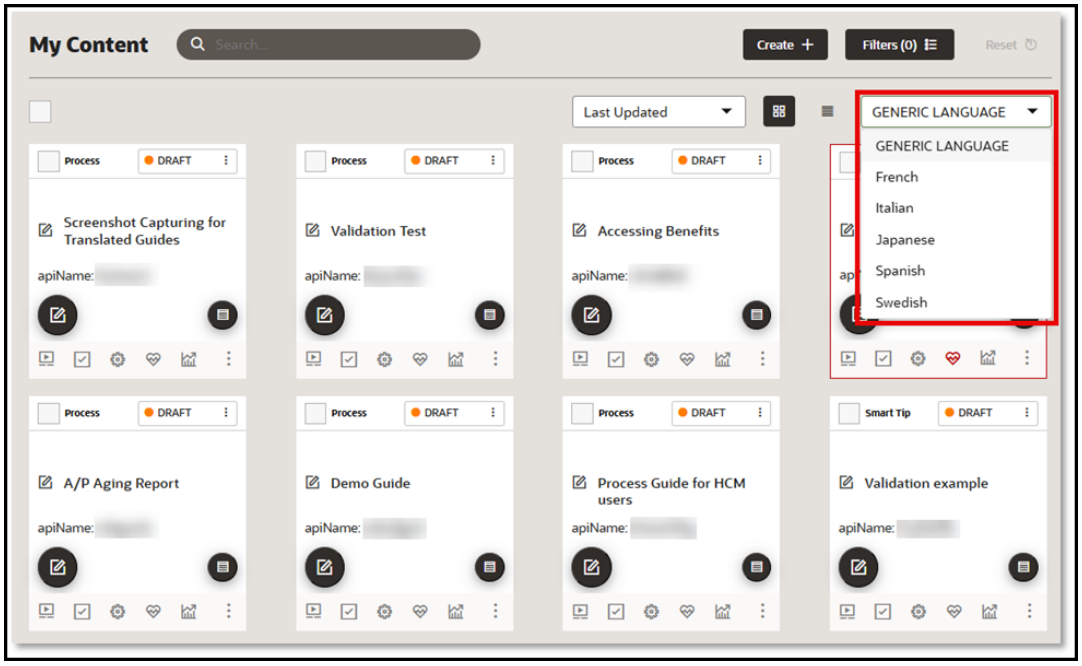
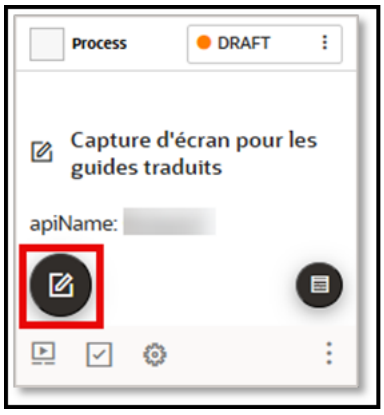
manually re-capture step screenshots of translated guides, including any translated content. This enhancement also allows developers to use the screenshot editing tool in the Content Editor (first introduced in OGL 25B) to blur sensitive areas of the screenshot to better safeguard data and enhance privacy.

Capturing Screenshots for Translated Guides

1. From the **My Content** page, select the **Language** drop-down menu and select an available language that contains translated content items.



2. Select the **Editor** button within a translated guide to open the guide in the Full Editor.



3. In the Editor, select the **Edit Tip** button.

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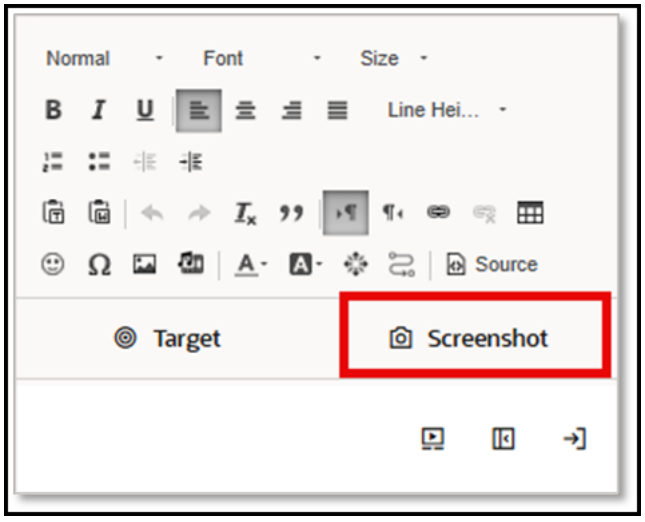
4. In the Edit Tip panel, select **Screenshot** to re-capture the screen with the translated content displayed.Then select **Save & Exit Step**.



5. Repeat each step, as needed, to re-capture all necessary screenshots containing translated content.

Blurring Screenshots for Translated Guide

a. Select a translated guide from an available language within the Language folders.

b. Select the Content Editor button on the guide.

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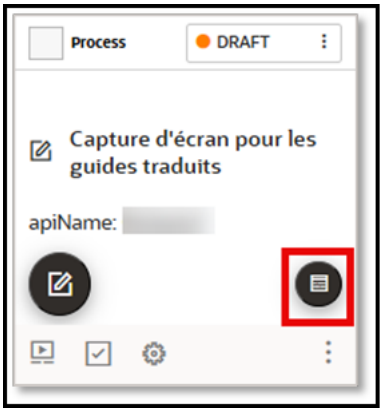
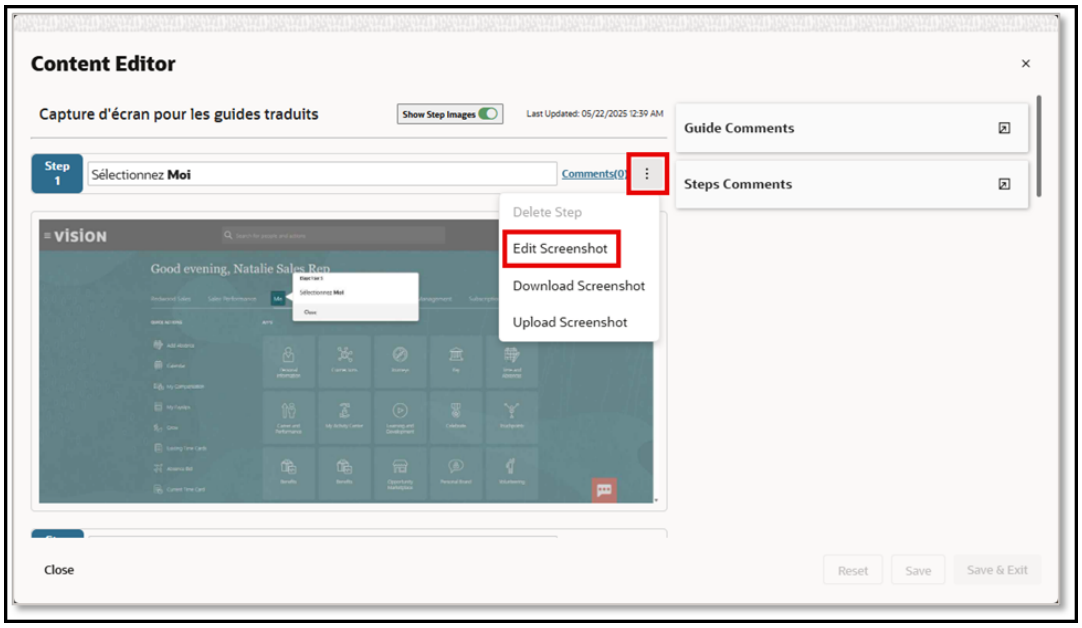


6. In the Content Editor modal, select the **Step options…** ( ) button next to the step you wish to edit, then select **Edit Screenshot**.



> **Note**
>
> You can also select the **Enlarge Screenshot** ( ) button in the top-right corner of a screenshot, then select the **Edit** (Edit) button to open the editing toolbar.

7. A screenshot editing toolbar opens on the right side of the screen.

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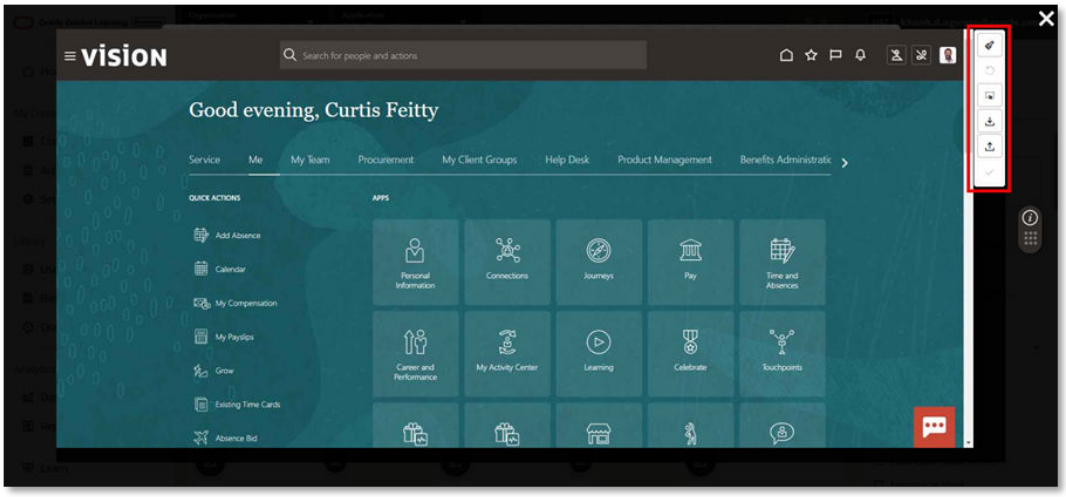

8. You can now utilize the Blur tool, Draw Selector tool, Download, and Upload options from the screenshot editing toolbar, as needed.

Known Issues/Expected Behavior

- **Expected Behavior**: For translated guides, each step screenshot will need to be manually re-captured in the Full Editor and/or uploaded via screenshot editing tool in the Content Editor.
- Hotspots and Launchers Not Retaining the Updated Selectors in the Flow Editor within the Language Revisions.
- **Download/Save functionality**: If developers attempt to download/edit an image from a different server (such as collections, Use Case library, Base Guide library, or imported guides from one tenancy to another), the action will be blocked, and an error message will appear, indicating that the image must be recaptured. Therefore, developers will need to recapture the screenshot before they are able to download or save it.
- **Upload functionality**: The maximum file size of the screenshot image is **1MB** (this is subject change). If the developers attempt to upload an image exceeding this file size limit, the upload will not be allowed, and the user will receive an error message.
- **File Format**: File upload is currently supported only in jpg format.

> **Note**
>
> While blurring screenshots may obscure sensitive areas of a screenshot, please note that previous versions of the guide may still exist in Version History, which may contain unblurred (unedited) screenshots. Please use caution when restoring previous versions of guides and apply any screenshot blurring, as needed, prior to publishing the guide.

Editor Controls

Below is a brief explanation of Editor Controls.

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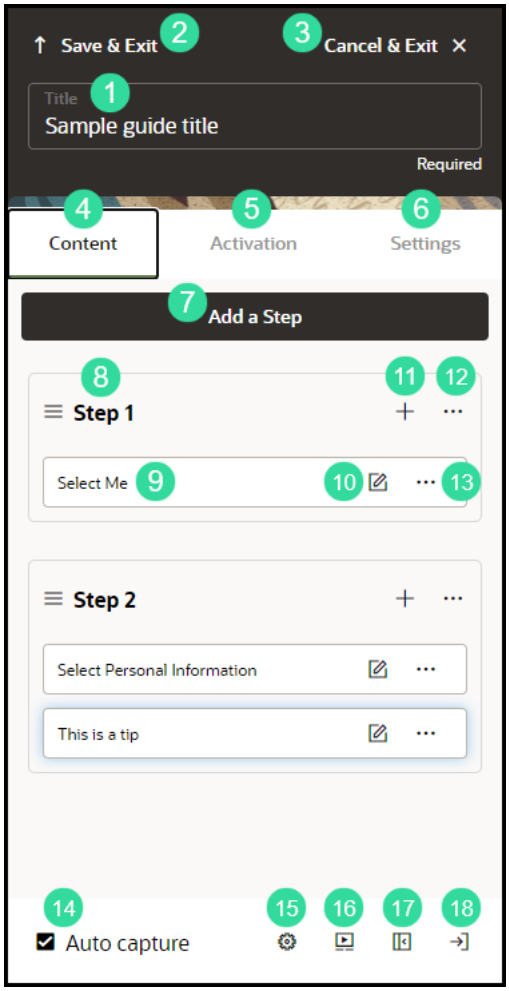

Sl	Element	Description	Note
1	Title	Maximum of 100 characters	
2	Save & Exit	Save changes and close the guide editor.	
3	Cancel & Exit	Discard changes and close the guide editor	
4	Content	Content tab allows you to add, edit, and configure guide steps and tips	Settings and configuration options may vary based on guide type
5	Activation	Activation tab allows you to add, edit, and delete guide activation settings	See Guide Activation for more information Enabling Guide Activation Settings
6	Settings	Settings tab allows you to configure and manage guide-level settings	Guide settings can also be accessed from the guide tile in the OGL console
7	Add a step	Adds a new step to your guide	
8	Current step	Displays the guide step and all associated tips	

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Sl	Element	Description	Note
9	Add another tip to this step	Adds a new tip immediately after the selected step/tip	
10	Step Actions	Opens a step-level action menu that allows you to Clone, Move, or Delete the selected step	
11	Tip text	Displays an abbreviated preview of the text within the tip	
12	Edit Tip	Opens the tip editor to allow text edits, formatting, and other tip-level adjustments	
13	Tip Actions	Opens a tip-level action menu that allows you to adjust Tip Settings, Clone, Move, or Delete the selected Tip	
14	Auto capture	Automatically take a screen capture of a tip as you select it. Select the checkmark (bottom right) of the screen along with the check box.	Use the camera icon to capture screenshots of additional step tips if more than one is added to the step.
15	Element Selector Settings	Opens a menu that allows you to adjust element selection preferences for this guide. Element selector options include: 1. Element Text 2. Element Title 3. Id Attribute	Do not use Element Text or Element Title if capturing elements for multi-language deployment. Some HTML elements have an id attribute. If they do, they are good for capturing the element because they tend to be constant and are unique in a page. Unfortunately, some applications either do not conform to the uniqueness on a page or may dynamically change the id. For such applications, of which Oracle Fusion Applications is an example, do not use Id Attribute.
16	Preview	Launch a preview of your guide in a new browser tab	If you have already opened the preview, select this again to refresh the preview tab and relaunch the guide with your recent changes.
17	Minimize the editor panel	Minimizes/hides the guide editor panel	Use for maximum screen view.

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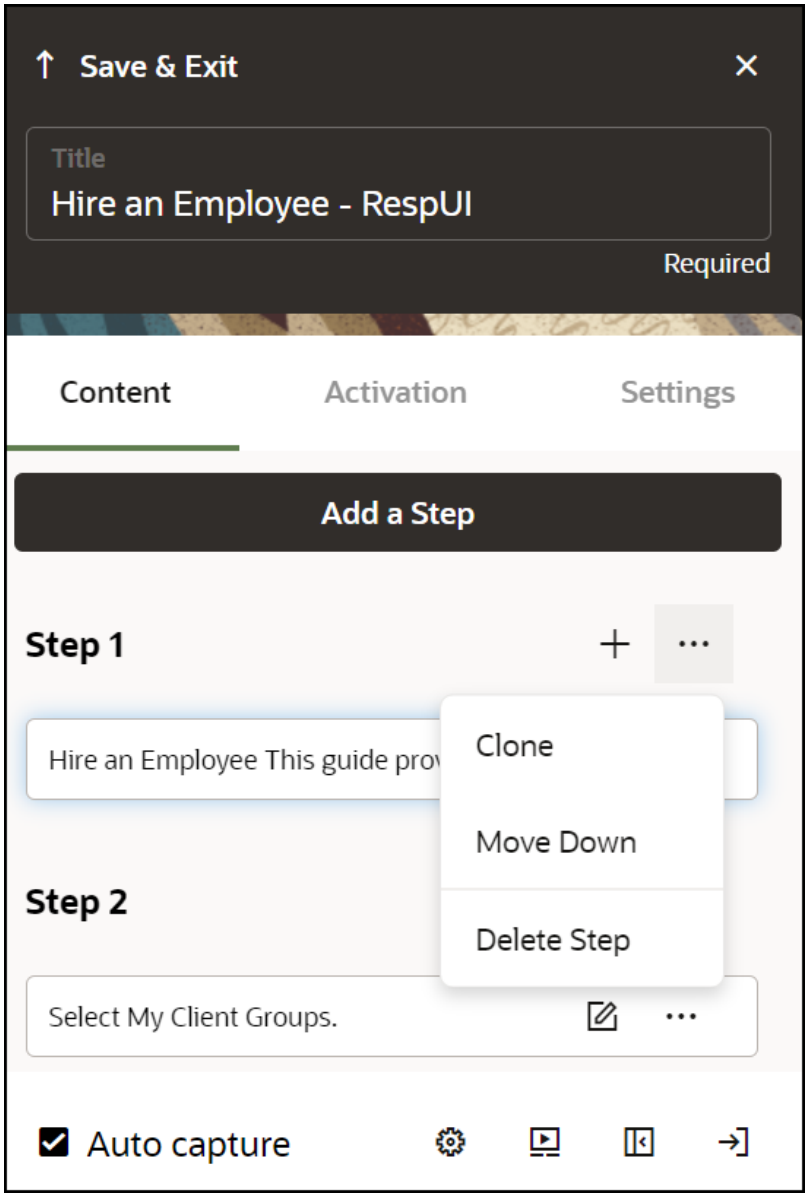
Sl	Element	Description	Note
18	Snap to Right or Left	Move the position of the editor to either the right or left side of the browser window.	

Step Control Basics



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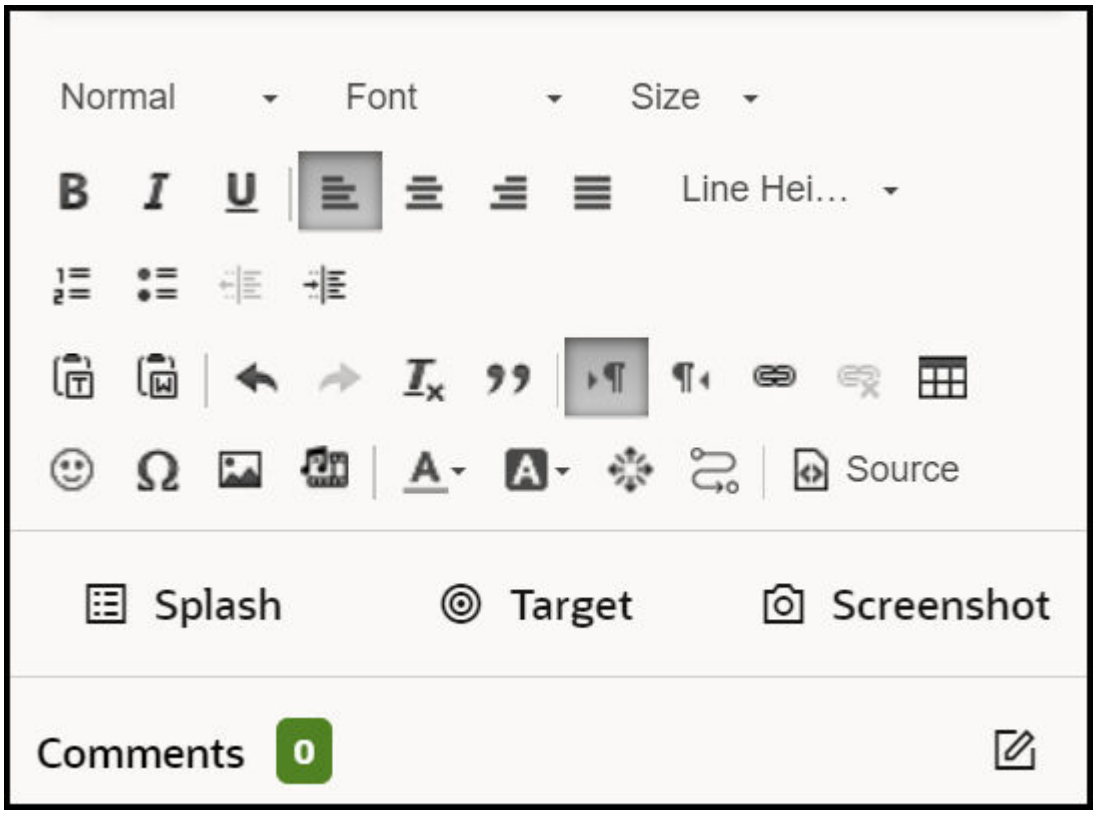
Element	Description	Note
Clone	Copy step	If the step has multiple tips, this copies only the currently selected tip.
Move Up/Down	Move the step Up/Down to change the target.	
Delete Step	Delete step.	If the step has multiple tips, this deletes all tips.
Step Settings	Open Step Settings.	
Change Tip Placement	Change tip placement (above, below, left, right, and so on) relative to the target.	
Select / Change Tip Target	Select to change the target element.	
Edit Tip	Make edits to the existing tip.	
Save & Exit	Save changes and advance to next step.	

The Full Editor



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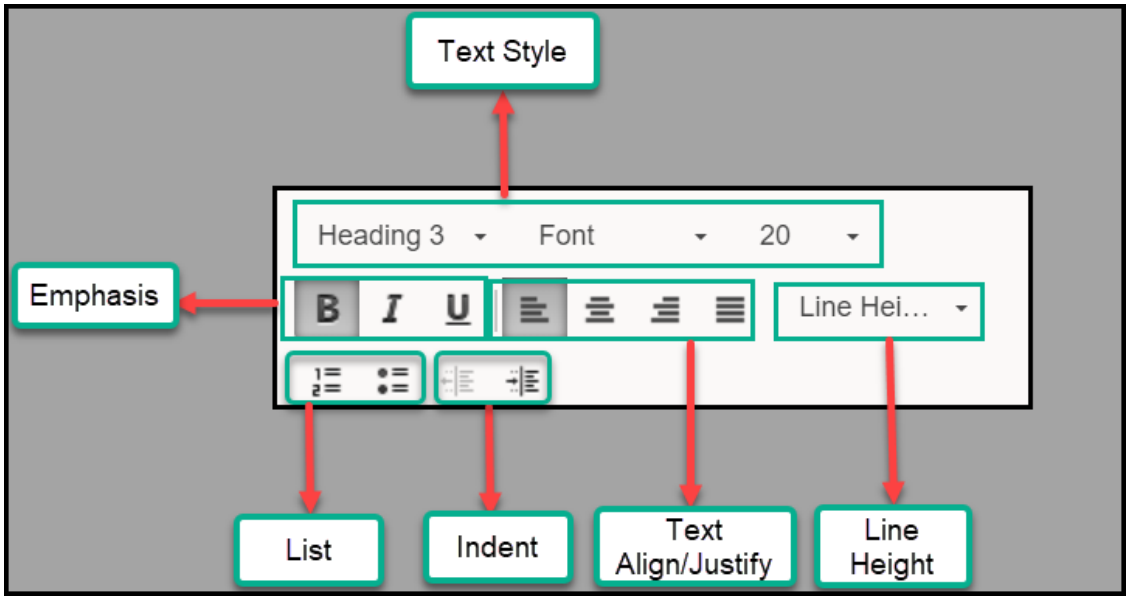

Sl No.	Element	Description	Note
1	Text Style	Set the alignment for the currently selected paragraph to Left, Center, Right, or Justify.	
2	Emphasis	Set or unset Bold, Italic, or Underline emphasis on the currently selected text.	
3	List	Add numbered or bullet list.	Right click the list elements to open the list properties dialog, where you may choose numbered list type (Decimal, Latin numerals, Alpha etc.) or bullet list type (Circle, Disc or Square).
4	Indent	Increase and decrease text indentation level.	Increasing the indentation level of a list item creates a nested effect.
5	Text Align / Justify	Set the alignment for the currently selected paragraph to Left, Center, Right, or Justify.	
6	Line Height	Set the line height.	

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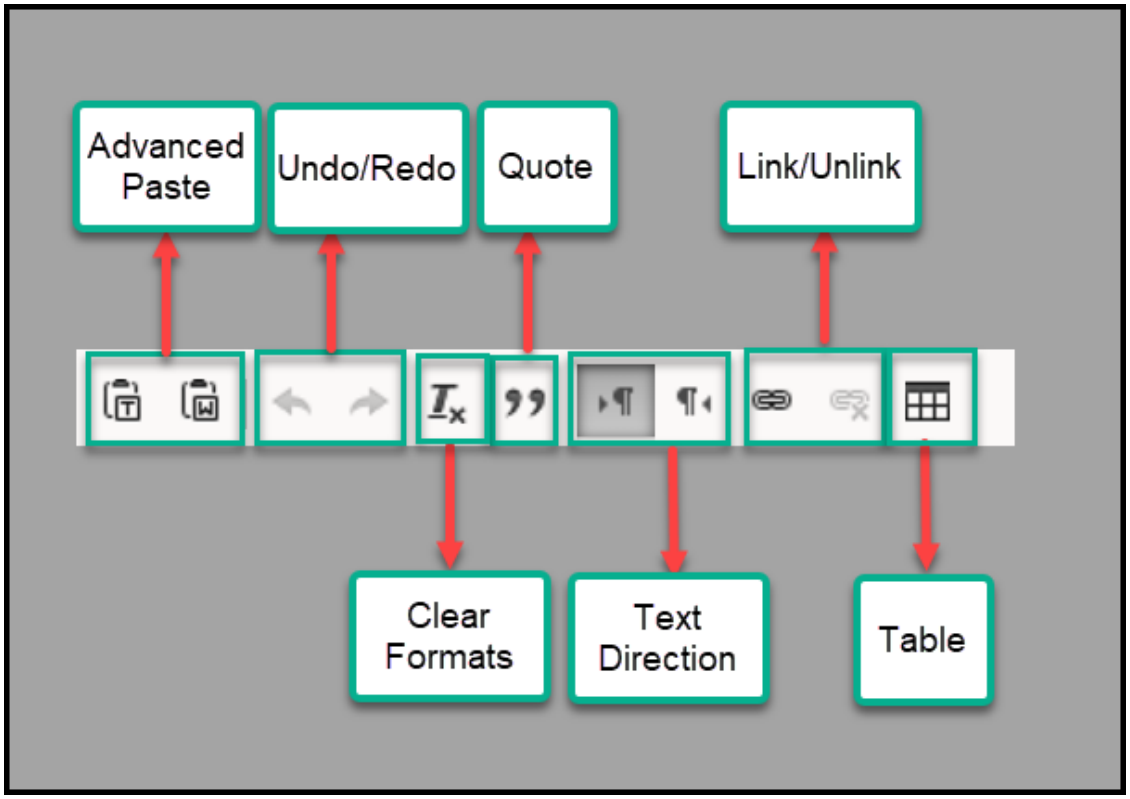

Sl No.	Element	Description	Note
1	Advanced Paste	Paste rich content as plain text (without styling) or paste from Word and keep the content styles intact.	
2	Undo / Redo	Undo changes to the content or redo changes which were previously undone.	
3	Quote	Turn selected text into a quote element with its custom styling.	
4	Link / Unlink	Turn selected text into a link (anchor) or insert link at the current cursor position.	The Link dialog allows you to set the type of the link, its URL, and its target window (open in same/new tab or window)
5	Clear Formats	Remove all content styling, such as text color, background color, font size and type etc.	
6	Text Direction	Set the direction of the currently selected paragraph to Right or Left.	

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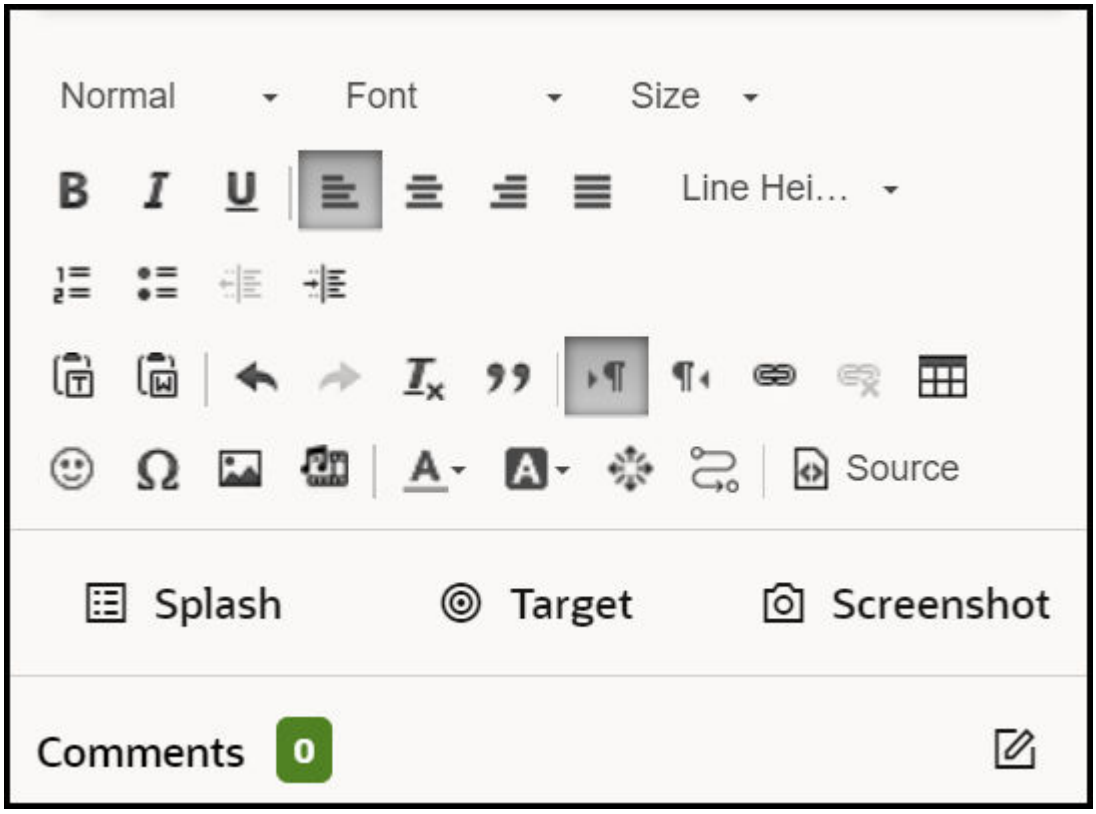
Sl No.	Element	Description	Note
7	Table	Add or modify a Table element. The Table Dialog lets you set table properties such as the number of rows and columns, table headers, border, width, and more.	You can also right-click a table in the content to open the table properties as well as cell and row level options.



Sl No.	Element	Description	Note
1	Smiley	Insert a Smiley	Make someone's day better!
2	Image	Add or modify an image element. The Image dialog allows you to set image properties such as its URL, size, alignment, and whether it is a Captioned Image.	You can change the image's size both from the Image dialog or by the in-content drag-to-resize controls. For Captioned Images, the caption can be edited directly in the content.
3	Text / Background Color	Set the text and background colors of the currently selected text. The color selection dialog lets you choose a color from a list of preset colors or enter your own custom colors.	

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Sl No.	Element	Description	Note
4	Launch a guide	Insert a link or button to launch a guide from a specific step.	Increasing the indentation level of a list item creates a nested effect.
5	Symbol	Add a special symbol to the current cursor position. This is especially useful for adding currency symbols, such as Euro or Pound or Yen.	
6	Embed Media	Add or modify a video or slideshow from an external source.	While the main use of this option is to embed videos in guides and messages, supported services also includes audio, photo, and rich content sources.
7	Iridize Session Variable	-	
8	Source	View and edit the HTML source of the step's content directly.	

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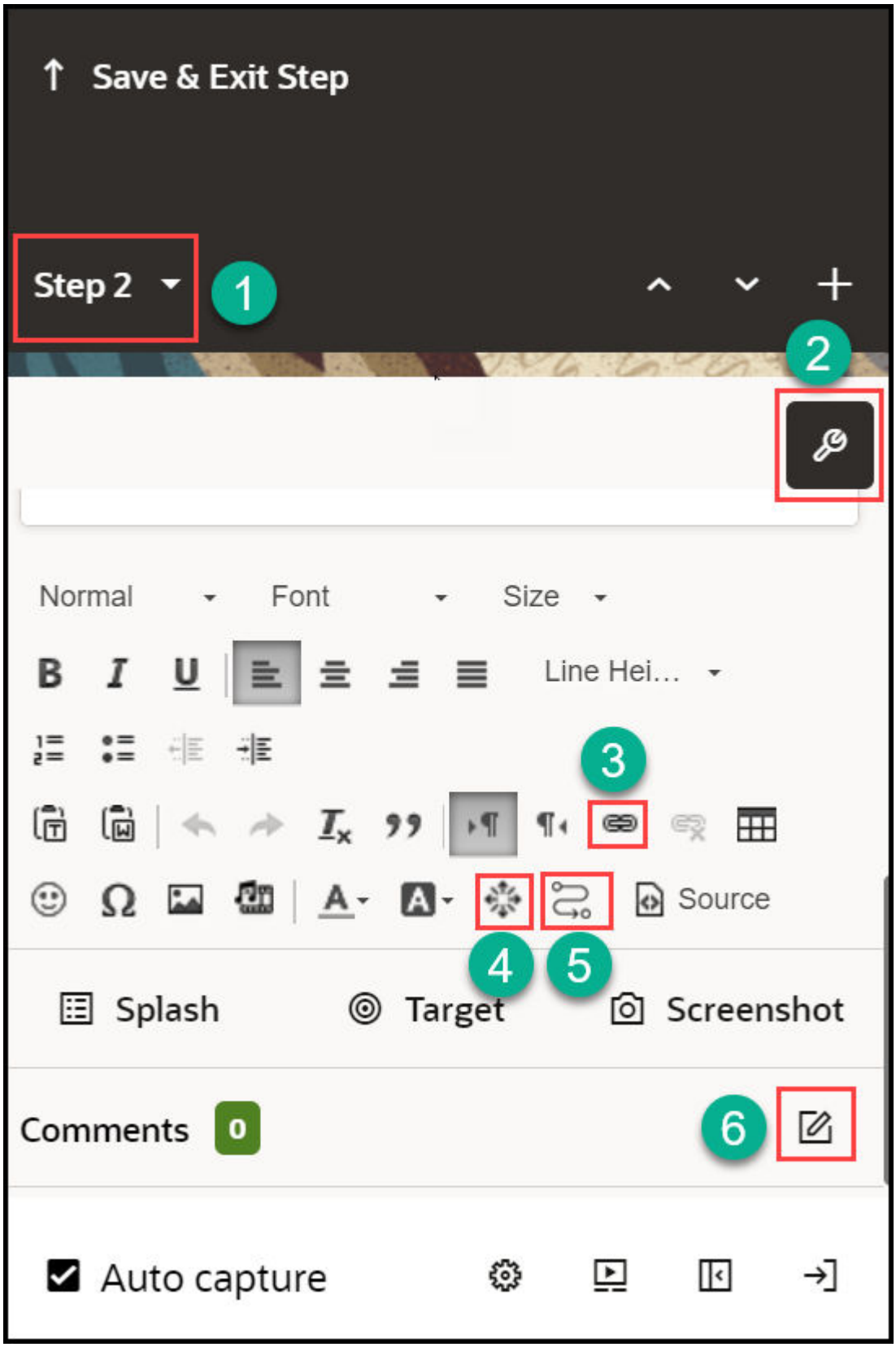
Step Settings Details



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Sl No.	Element	Description	Note
1	Show Step List	Displays the current step/tip being edited and allows you to jump to another step/tip.	
2	Step Settings	Opens the Step Settings panel for the current step/tip	Step Settings include Display Settings, Activation Settings, and Advanced Settings
3	Hyperlink	Select a part of the tip's content and select this button to convert it into a link.	
4	Session Variable	Select to add an Iridize Session Variable button.	Session Variable buttons can be used to create rich guide flows based on user choices. Selecting a session variable button dynamically sets a variable that can be used in step and branch conditions to control step activation and guide flow. The variable can also be persisted as a user field, which can be used in Guide Activation Conditions.
5	Launch Guide	Insert a link or button to launch a guide from a specific step.	
6	Step Comments	Displays the number of comments associated with the current step/tip	Use the Edit (pencil icon) to add comments to the current step/tip

Note: Place the cursor near the elements and the names of those elements pop up for your reference.

Display Settings

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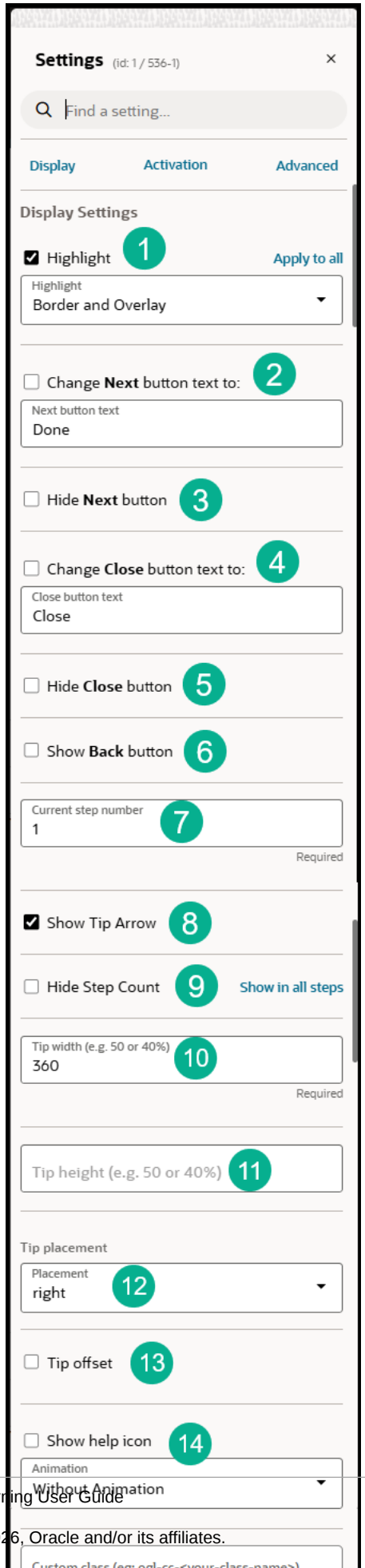

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Table 3-1 Display Settings Interface

Setting Name	Description
1. Highlight / Apply to all	Adds a Border/Overlay/Border+Overlay around the selected element. • Border – adds a border around the selected element. Al • Overlay – adds an overlay around the selected element. Elements outside the selected element will be visible but inaccessible while the step is active/being displayed. • Border and Overlay – Display a border around the highlighted element and mask the rest of the page. Click **Apply to all** to update all tips to the current setting.
2. Change **Next** button text to:	Allows you to change/update the text of the **Next** button. On the first tip of a guide, consider changing the text to something more engaging like “Let’s Go” or “Show Me”. For the last tip, try “That’s It” or “Got it!” or "Done".
3. Change Next button text to:	Allows you to change/update the text of the Next button. On the first tip of a guide, consider changing the text to something more engaging like “Let’s Go” or “Show Me”. For the last tip, try “That’s It” or “Got it!” or "Done".
4. Hide **Next** button	Determines if the Next button should be displayed or not.
5.Hide **Close** button	Determines whether the **Close** button is displayed on the tip for end users. Use this setting when launching a guide for first-time users or for Smart Tips that appear and disappear based on hover actions
6.Show **Back** button	Determines is the Back button is displayed on the tip for end users. When it is not possible to move back to prior pages in the host application, it is a best practice to hide the Back button. Never have the Back button on the first step of a guide.
7. Current Step Number	Sets the number in the field that you want to be assigned as the step number for this tip. When a step has multiple tips, but you want the step count functionality to be meaningful, assign a step number to the tip so that the user can better understand where they are in the process.
8. Show Tip Arrow	Determines whether the pointed tip arrowhead will be displayed.
9. Hide Step Count Hide / Show in all steps	Toggles the display of the step counter at the bottom right corner of your tip. Depending on whether this option is selected or not, the link will display either Hide or Show in all steps. Use the link to update other steps in the guide with the same setting. **Note** This setting is only available for Process guides and not Smart Tips, Beacons, or Message guides.

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Table 3-1 (Cont.) Display Settings Interface

Setting Name	Description
10. Tip width	Determines the tip width. Select the number in the text field to edit. The tip width can be set in pixels (350 = 350px) or as % of the screen area(50%).
11. Tip height	Determines the tip height. Select the number in the text field to edit. The tip height can be set in pixels (350 = 350px) or as % of the screen area (50%). **Note** If tip height is set to a size that smaller than the amount of tip text displayed, scroll bars will automatically appear to allow end-users to scroll up/down to read through the tip text.
12. Tip placement	Use this setting to define the position of the tip in relation to the selected element. (i.e. Top/Bottom/Left/Right)
13. Tip offset	Determines the offset of the Tooltip relative to the selected element. To offset the tooltip • **UP**: Enter a negative number (i.e. -50) in the **top** offset field • **DOWN**: Enter a positive number (i.e. 50) in the **top** offsetfield • **LEFT**: Enter a negative number (i.e. -50) in the **left** offset field • **RIGHT**: Enter a positive number (i.e. 50) in the **left** offsetfield
14. Show help icon	Enable a graphical help icon next to the target element. • Show help icon - **Without Animation** - Shows a static Help Icon (i.e ?) • Show help icon - **With Animation** - Shows an animated Help icon

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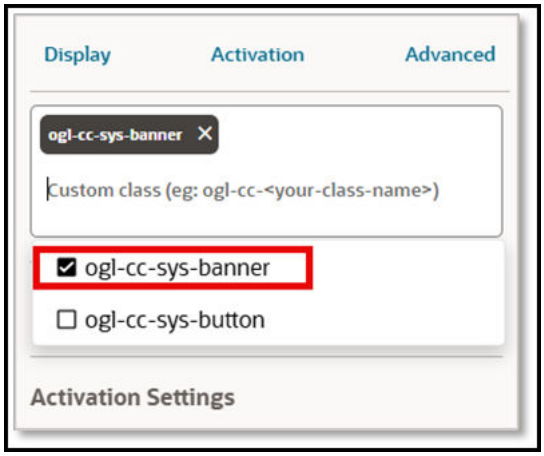
Table 3-1 (Cont.) Display Settings Interface

Setting Name	Description
15. Custom class	Where applicable you can enter a custom CSS class that will apply to the tooltip. To add multiple custom classes, separate each class with a single whitespace. This setting includes 2 preset custom classes (button and banner) which can be selected from the drop-down menu when the field is selected, as shown below:  Selecting either option will convert the current tooltip to either a banner or button, based on your selection. You can adjust the width and height of these elements using the Tip Width and Tip Height settings. **Note** To implement additional custom class images, you will need to update the OGL Theme Design Kit and related CSS classes. Refer to the Theme section of the user guide for more information.
16. Show beacon	Enable a flashing beacon associated with the target element to draw the end user's attention.
17. Disable Element	Blocks the user from interacting with the highlighted element. Use this option if you want to highlight a button and explain it while making sure the user cannot select it.
18. Change Highlight Element	While the tip will always point to the target element, you can choose to highlight a different element on the screen. This is commonly used in steps that require two actions. For example, consider a step that says “Enter criteria, then select Search.” The target is the search area, but the highlighted element is the Search button.

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Activation Settings

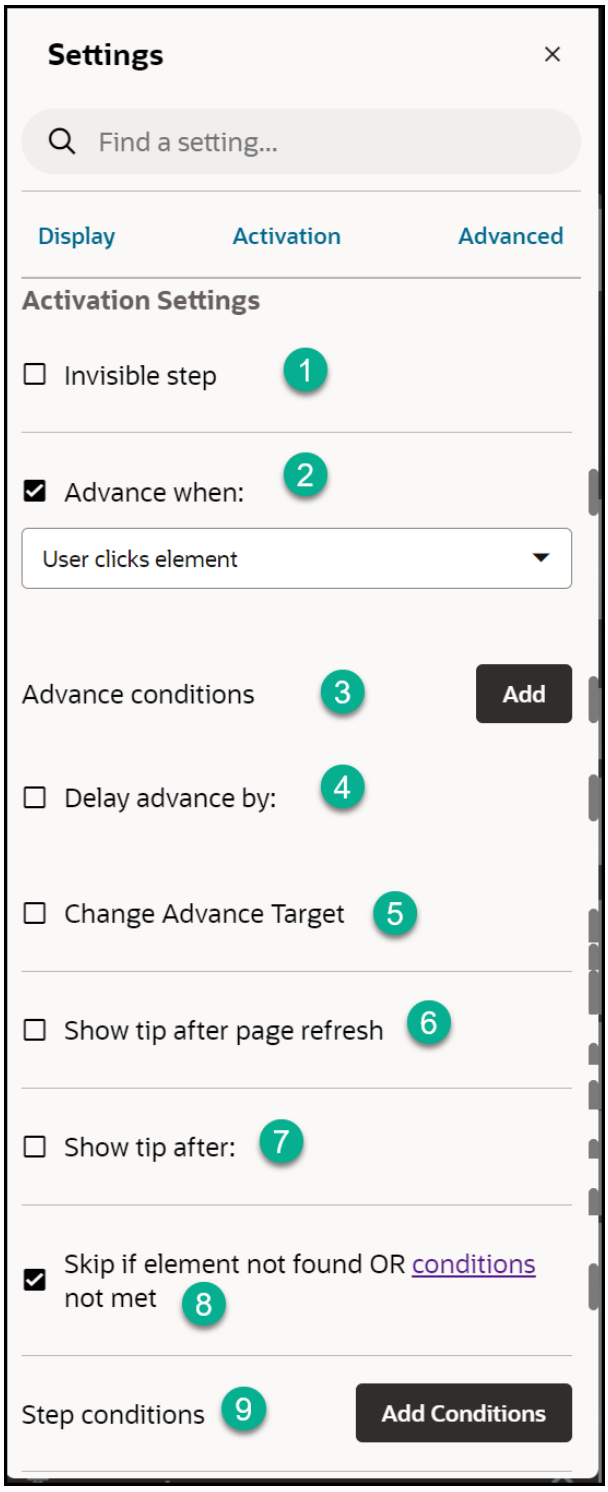

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Table 3-2 Display Settings Elements and their Descriptions

Element	Description	Note
1. Invisible step	An invisible step has no visual representation. But it still behaves like a normal step and can wait for any type of user interaction.	Use this setting in conjunction with the 'Immediately' setting for 'Advance when' for cases like the following: • Advancing a guide when an element appears. • Launching a guide after a user selects a certain button. • Launching a guide after a user has started filling out fields on a page. • Waiting for a user to perform an action and continue a guide after the action has been completed.

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Table 3-2 (Cont.) Display Settings Elements and their Descriptions

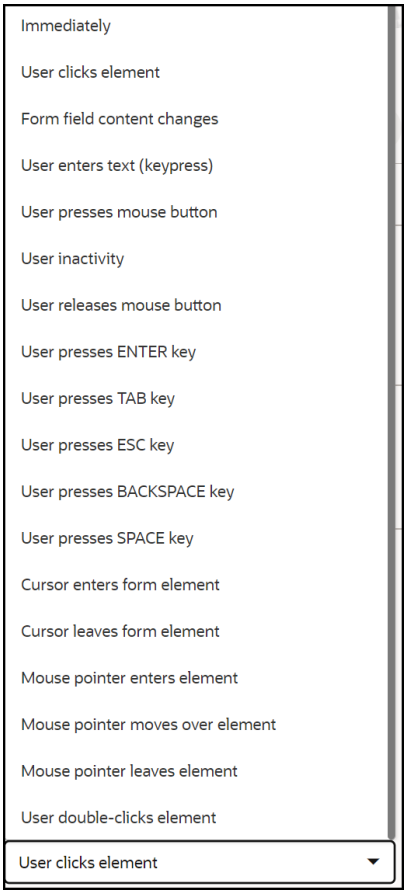
Element	Description	Note
2. Advance when	Specify what user interaction advances the guide. The most common type is User clicks element. 	Commonly used events include mouse events (click, double-click), keyboard events (keypress, tab) and page element events (gain/lose focus). • **Mouse Events** – **click** - use this to advance when the user clicks on the selected element – **double click** - use this to advance when the user double clicks on the selected element – **mouseover** - use this to advance when the mouse pointer enters the selected element. – **mouse down** - use this to advance when the user starts to click on the selected element. This is most commonly used as a substitute for when the click event cannot be used. **Note** In the **Advance when:** setting, choose the user action that you wish to be counted when the user interacts with the selected element. When a user clicks an element, there are two distinct events that can be counted: • User presses mouse button (i.e., "mousedown"): Records the event as soon as the mouse button is pressed down. • User clicks element (i.e., "click"): Records the event after the mouse button is pressed and then released on the same element. **Key Differences:** • 'mousedown' = happens **before** the full click is completed. Use 'mousedown' for immediate response. • 'click' = requires both **press** and **release** on the same target. Use 'click' for actions that confirm a full click.

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Table 3-2 (Cont.) Display Settings Elements and their Descriptions

Element	Description	Note
		• **Keyboard Events** – **keypress** - use this to advance when a character key (or enter) is pressed. – **enter** - used to advance when the user clicks on the Enter key. – **tab** - used to advance when the user clicks on the Tab key. – **esc** - used to advance when the user clicks on the ESC key. – **backspace** - used to advance when the user clicks on Backspace key. – **space** - used to advance when the user clicks on the Space key. • **Form Events** – **Cursor enters Form Element** - use this to advance when the selected element has lost focus. – **Form Field Content Changes** - use this to advance when the user has made a selection a drop down list, clicked on a radio button or a checkbox. – **Cursor leaves Form Element -** use this to advance when the selected element has received focus.
3. Advance conditions	Sets additional page conditions for when the user can advance to the next action.	For example: Use this if the page has a visible element or if a form field has a selected value.
4. Delay advance by	Sets a timed delay in milliseconds before advancing to the next step. If the step has an 'Advance when' event set, the delay period starts after that event occurs. If there is no 'Advance when' event set, the delay period starts as soon as the target element is found. Use the list of values to choose additional predefined durations and units (min, hour, etc.).	For example: Use this in conjunction with the User enters test (keypress) setting for Advance when. The next tip will appear automatically x milliseconds after the user has started typing text. CAUTION: With this setting the guide does not advance to the next step before the delay period is over. Thus, a page refresh or navigation during the delay period will cancel the advancement to the next step.
5.Change Advance Target	Use this setting when you want the tip to point to one target element and at the same time wait for the user to interact with another element.	

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Table 3-2 (Cont.) Display Settings Elements and their Descriptions

Element	Description	Note
6. Show tip after page refresh	This option can prevent tip flashing.	Use “Show tip after” as an alternative for “Show tip after page refresh” if you need to prevent a tip from flashing but there is not a page refresh. This can sometime happen when a partial page refresh occurs.
7. Show tip after	Sets a timed delay in milliseconds before showing the current tip. Use the list of values to choose additional pre-defined durations and units (min, hour, etc.).	Use the edit (pencil) icon to modify defaults.
8.Show tip on hover	Only show this tip when the user moves their mouse over the target element, help icon, or beacon.	Left unselected the tip will always display. Use in conjunction with Smart Tips.
9. Skip if element not found OR conditions not met	Tips are rendered as soon as their related element becomes visible. Choose this option to not wait for an element and simply skip to the next step in the guide if the element is not found or additional defined conditions are not met.	For example: If you want to create a guide on the Settings page of your application, your first tip should probably be: "Select Settings”. But what if the user launched the guide from the Settings page? The solution: set that first step to be optional.

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Table 3-2 (Cont.) Display Settings Elements and their Descriptions

Element	Description	Note
10. Step Conditions	Use this setting to add and edit a list of page conditions for the tip. The tip will only be shown when all the conditions are fulfilled and will be hidden as soon as any of the conditions becomes false.	There are cases where you want to condition the showing of a specific tip in a step on the state of the page the guide is running on. For example, whether a page element, other than the target element of the tip, exists or is visible on the page. Another example can be to only show a tip on a specific page based on the page URL (and maybe skip the step on other pages). This setting is especially useful in cases where you have multiple tips in a step. It is especially useful for conditional branching of a guide, where the different tips in a step have different conditions and are set to launch different guides (or continue with the current guide). Another common use case is for optional navigation steps, that should only show if the user is not already on the page where the guide is built to run. **Note** Step Conditions can also allow you to apply validation rules to form fields to ensure accurate data entry. To learn more about how to use Form Field Validation, refer to this Knowledge Article.
Anti Flicker Conditions	Adding page URL condition to a step in order to avoid/control the flickering issue when page is refreshed	

Advanced Settings

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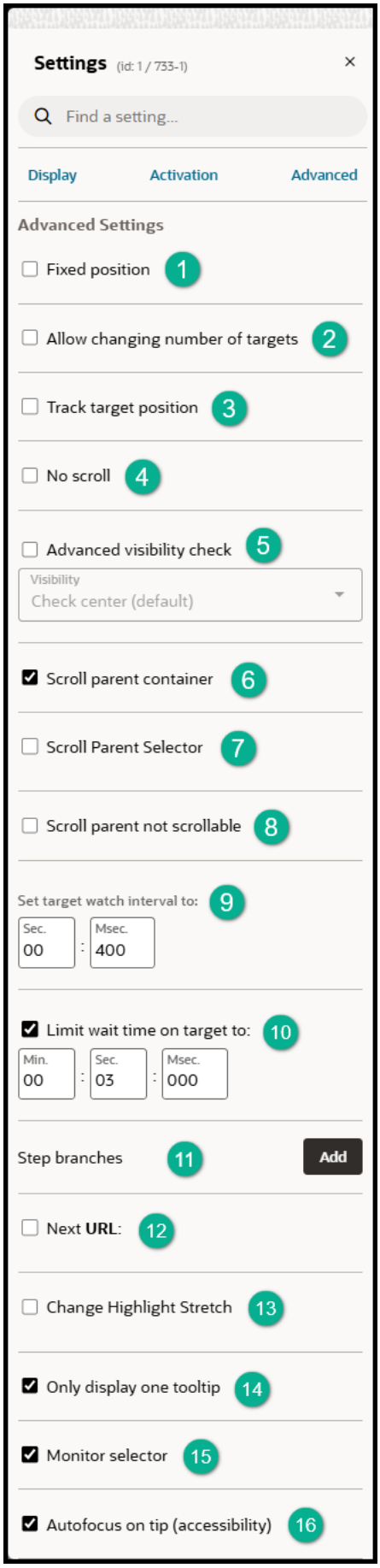

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Element	Description
1. Fixed Position	When using a splash tip, you can use this setting so that the tip will remain visible even if the user scrolls up or down the page.
2. Allow changing number of targets	Use this setting when attaching a tip to multiple targets, where the number of targets may dynamically change while the tips are showing.

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Element	Description
3. Track target position	If the element's position moves dynamically (fixed positioning), this will ensure that the tip stays on the target element. This setting is useful when page contents or elements change dynamically on a screen. For example, an error message may appear as a banner on the top of the screen, moving all pages elements further down the screen. Turning on Track Target Position moves the OGL tip in line with the repositioned elements when this occurs.
4. No scroll	By default, the OGL will scroll the page so that the tip and the highlighted element will be visible. This setting allows you to disable this behavior.

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Element	Description
5. Advanced visibility check	On some applications, OGL might think that an element is visible while it is not. This can happen if the web application uses multiple layers and an element could be hidden behind another one that was added on top of it. This setting will run some extra checks against the element and options include: • Check Center (Default) • Check all elements corners • Check the element After scrolling
6. Scroll parent container	If the target element is within an internal element with an internal scroll, this will enable us to scroll down to the target element.

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Element	Description
Scroll Parent Selector(If Scroll parent container is checked.	Use automatic scroll parent element detection.

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Element	Description
d) Scroll parent not scrollable.	Scroll element when the parent container is not scrollable. Enable scroll option to target element when the parent element is not scrollable.

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Element	Description
Set target watch interval to	This is used to set the watchdog interval. The behavior is, when the target element disappears the tip should remain visible for the time set in the editor and then hide.

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Element	Description
10. Limit the wait to 'x' ms.	Guide tips wait indefinitely for the target element to appear. This setting sends an error message if the current target element does not appear within 'x' minutes, seconds, and milliseconds, so that we can notify you and fix the problem.
11. Step Branches	This setting allows you to define one or more branches in the step, either jumping to another step in the current guide or launching a different guide.

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Element	Description
12. Next URL	Navigates the user to a new page when selecting the next button. (Note: This is especially useful if you want to create a site tour.)
13. Change Highlight Stretch	Make the highlighted section of the screen smaller or bigger using pixel precision. This is especially useful if the section you want to highlight does not have a corresponding HTML container like highlighting a column in a table.

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Element	Description
Only display on tooltip selector	When you setup a tip in OGL, you must target a selector as a way to identify the element on the page that the tip should point to. Sometimes, that selector will match multiple elements on the screen. In order to avoid displaying the same tooltip multiple times, this setting is turned on by default.
Monitor selector	This is a default setting that tells OGL to keep searching for the element on the page even if it has found a match for it. This is important because sometimes elements (e.g. menu items) on the page disappear and reappear, and we want the tooltip to attach to them in these situations. However, if you selected "Skip if element not found" in the Activation, then deselect the Monitor selector.

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Item	Description
16. Autofocus on tip (Accessibility)	Auto focus is used to automatically get the browser focus on tooltips, if not enabled the focus will be on the target element.

The Full Editor

Open the OGL Full Editor

When creating or editing a guide, the OGL Full Editor will open in the host application and will be docked on the left side of the page, by default, like this:

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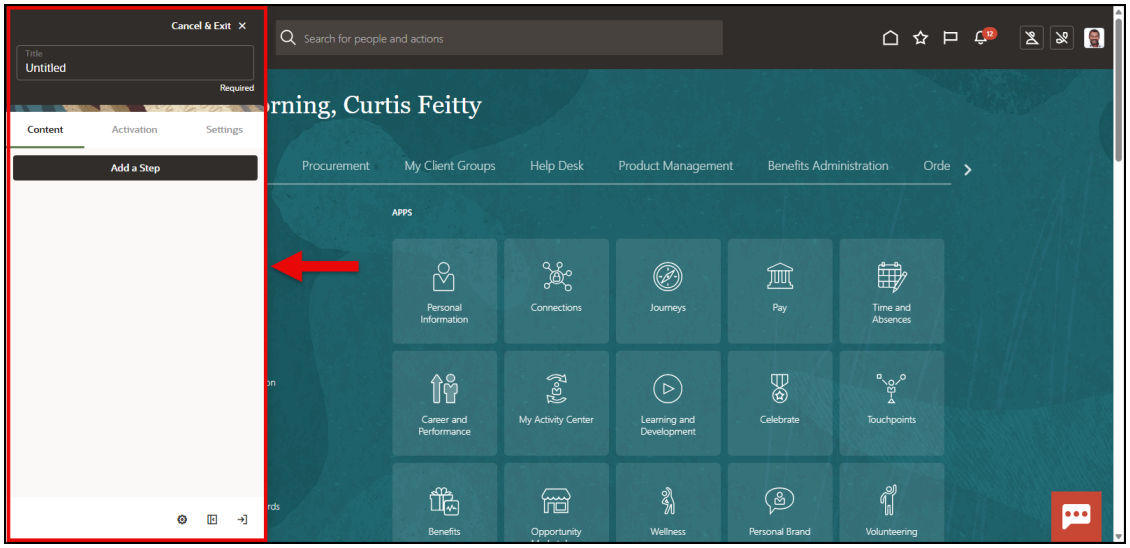

Moving the OGL Editor panel

The OGL Editor may cover parts of the application that you need to work with. To reposition the editor panel, you can move it to the left or right side of the screen or minimize it entirely by using the buttons at the bottom of the editor panel.

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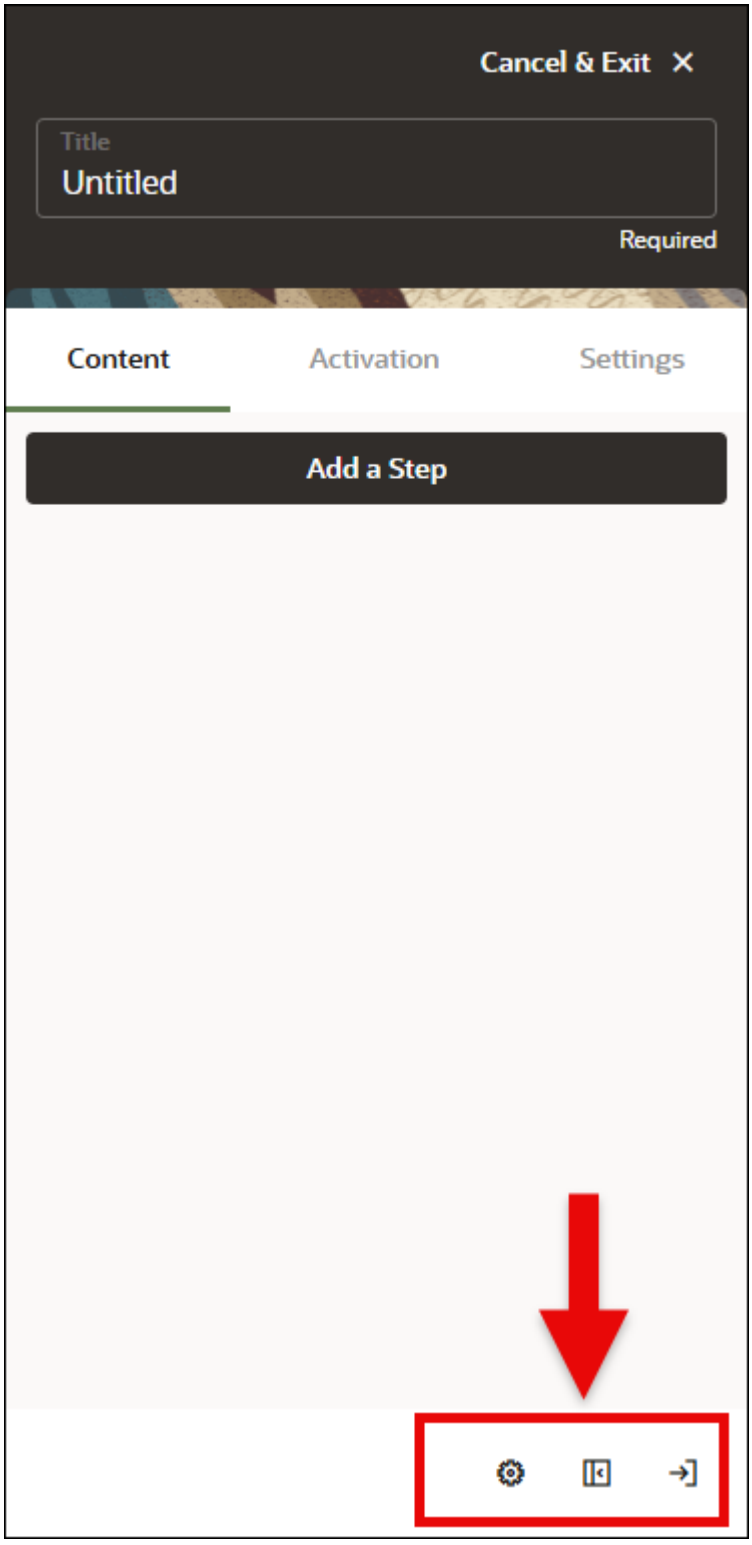

To dock the OGL Editor to the right or left side of the screen, select the **Snap to right** or **Snap to left** buttons.

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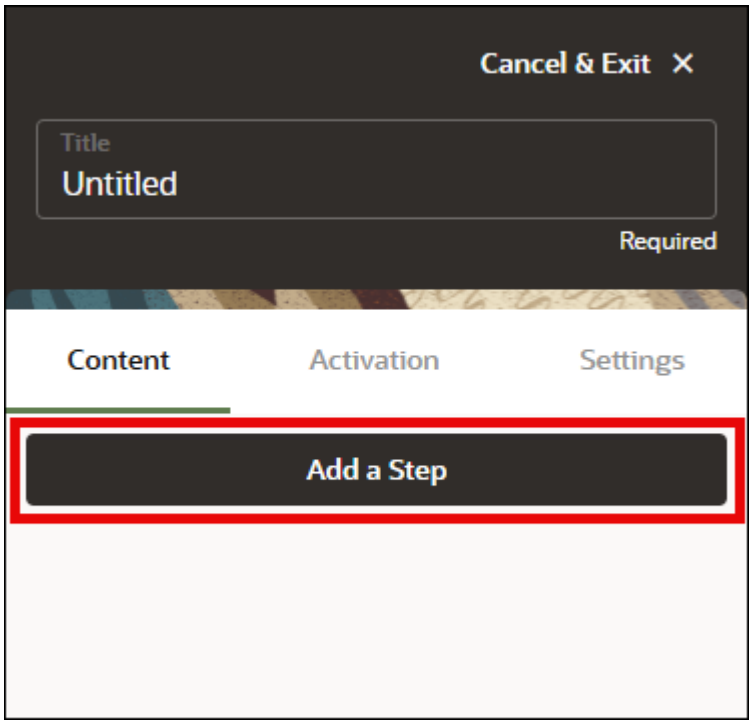
To minimize the OGL Editor entirely, select the **Minimize the editor panel** button.

Select **Add a Step** to add a new step to your guide and open the editing tools.



OGL Full Editor Controls

The editor panel is comprised of several sections, each with different settings and tools that you can use to configure your guide steps and tips.

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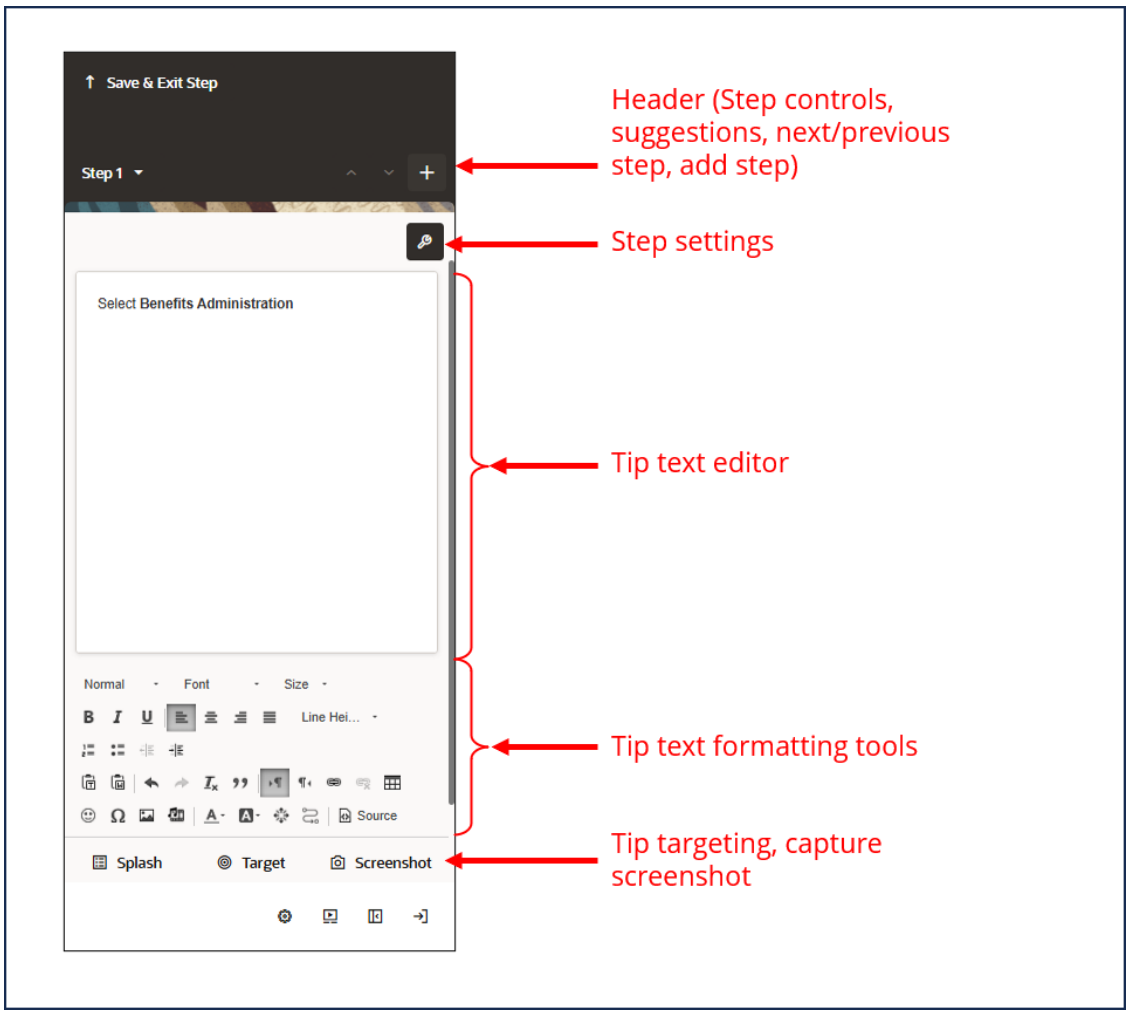

Formatting Tools

The formatting tools section of the editor provides various options to format your tip text, such as text style, font, size, color, etc. Refer to the diagrams below for a description of each tool button.

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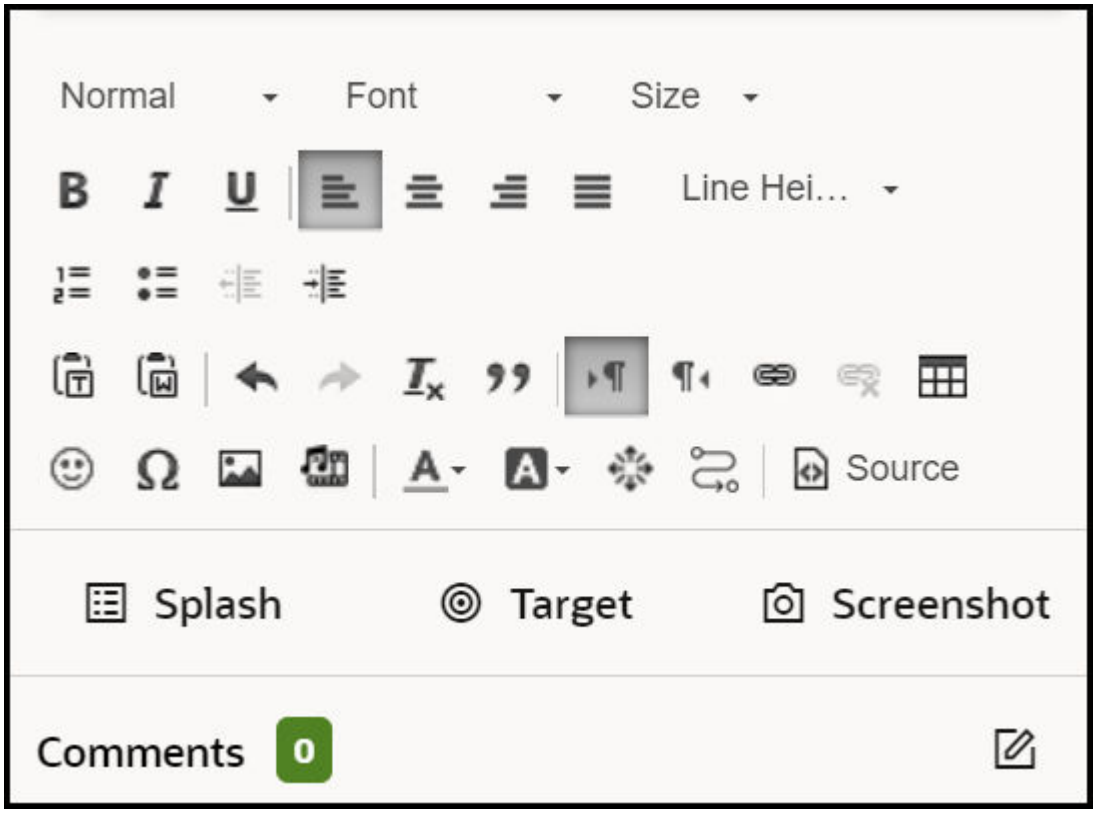

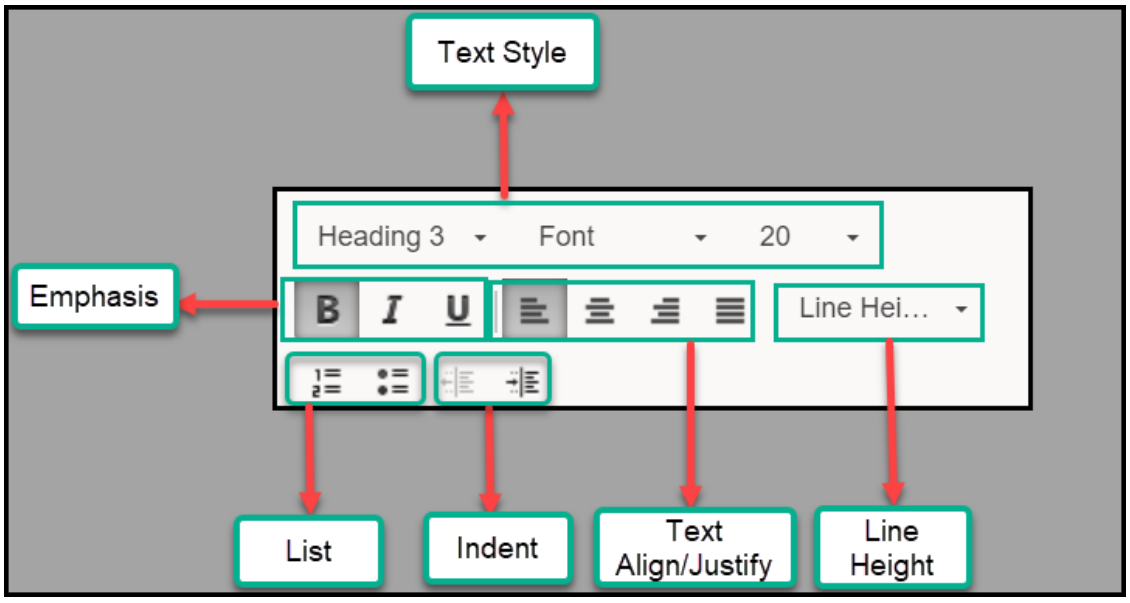

Sl No	Element	Description	Note
1	Text Style	Set or modify the selected text's style (such as Heading 1-6 or Paragraph), font type and font size using these dropdowns.	

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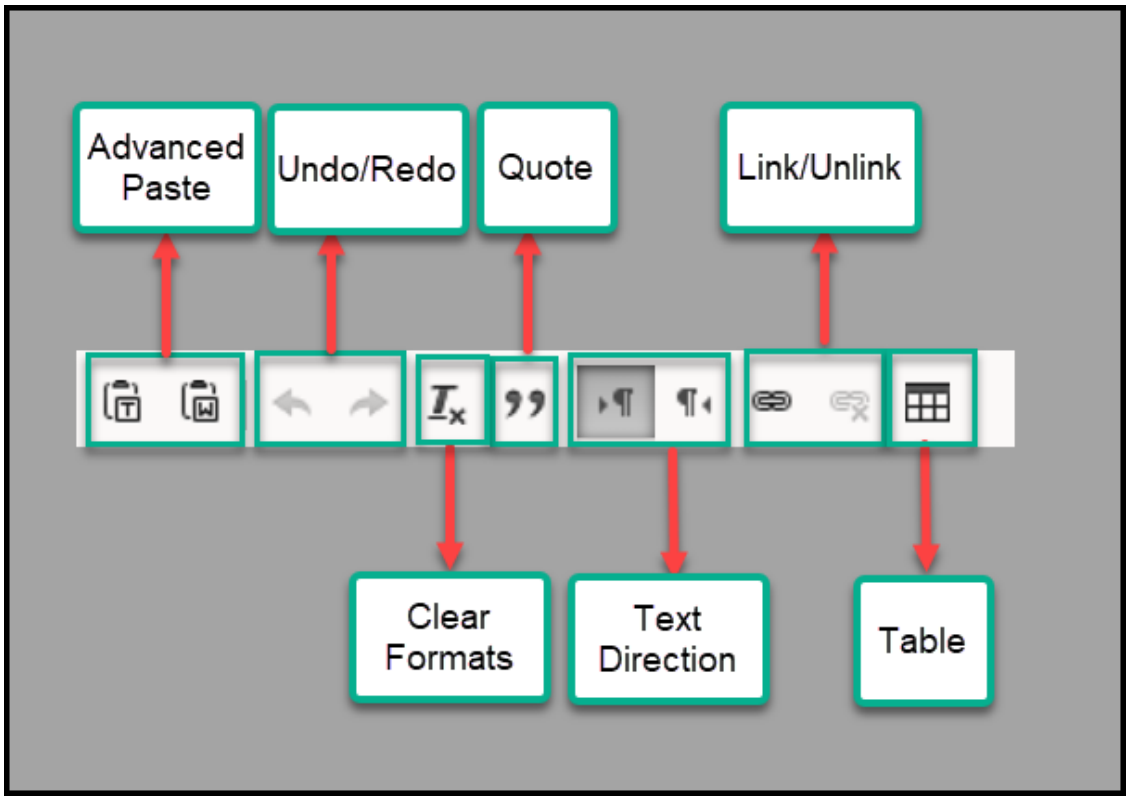
Sl No	Element	Description	Note
2	Emphasis	Set or unset Bold, Italic, or Underline emphasis on the currently selected text.	
3	List	Add numbered or bullet list.	Right click the list elements to open the list properties dialog, where you may choose numbered list type (Decimal, Latin numerals, Alpha etc.) or bullet list type (Circle, Disc or Square).
4	Indent	Increase and decrease text indentation level.	Increasing the indentation level of a list item creates a nested effect.
5	Text Align / Justify	Set the alignment for the currently selected paragraph to Left, Center, Right, or Justify.	
6	Line Height	Set the line height.	



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Sl No.	Element	Description	Note
1	Advanced Paste	Paste rich content as plain text (without styling) or paste from Word and keep the content styles intact.	
2	Undo / Redo	Undo changes to the content or redo changes which were previously undone.	
3	Quote	Turn selected text into a quote element with its custom styling.	
4	Link / Unlink	Turn selected text into a link (anchor) or insert link at the current cursor position.	The Link dialog allows you to set the type of the link, its URL, and its target window (open in same/new tab or window)
5	Clear Formats	Remove all content styling, such as text color, background color, font size and type etc.	
6	Text Direction	Set the direction of the currently selected paragraph to Right or Left.	
7	Table	Add or modify a Table element. The Table Dialog lets you set table properties such as the number of rows and columns, table headers, border, width, and more.	You can also right-click a table in the content to open the table properties as well as cell and row level options.

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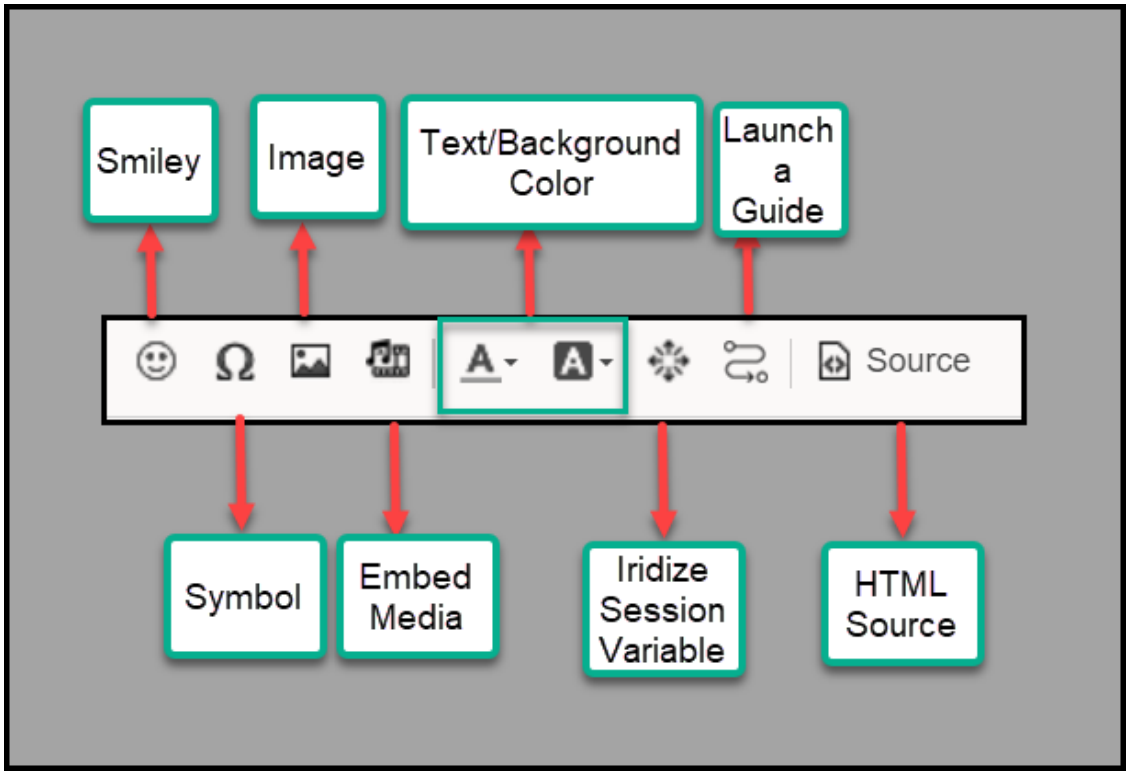

Sl No.	Element	Description	Note
1	Smiley	Insert a Smiley	Make someone's day better!
	Image	Add or modify an image element. The Image dialog allows you to set image properties such as its URL, size, alignment, and whether it is a Captioned Image.	You can change the image's size both from the Image dialog or by the in-content drag-to-resize controls. For Captioned Images, the caption can be edited directly in the content.
2	Text / Background Color	Set the text and background colors of the currently selected text. The color selection dialog lets you choose a color from a list of preset colors or enter your own custom colors.	
3	Launch a guide	Insert a link or button to launch a guide from a specific step.	
4	Symbol	Add a special symbol to the current cursor position. This is especially useful for adding currency symbols, such as Euro or Pound or Yen.	

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Sl No.	Element	Description	Note
5	Embed Media	Add or modify a video or slideshow from an external source.	While the main use of this option is to embed videos in guides and messages, supported services also includes audio, photo, and rich content sources.
6	Iridize Session Variable		
7	Source	View and edit the HTML source of the step's content directly.	

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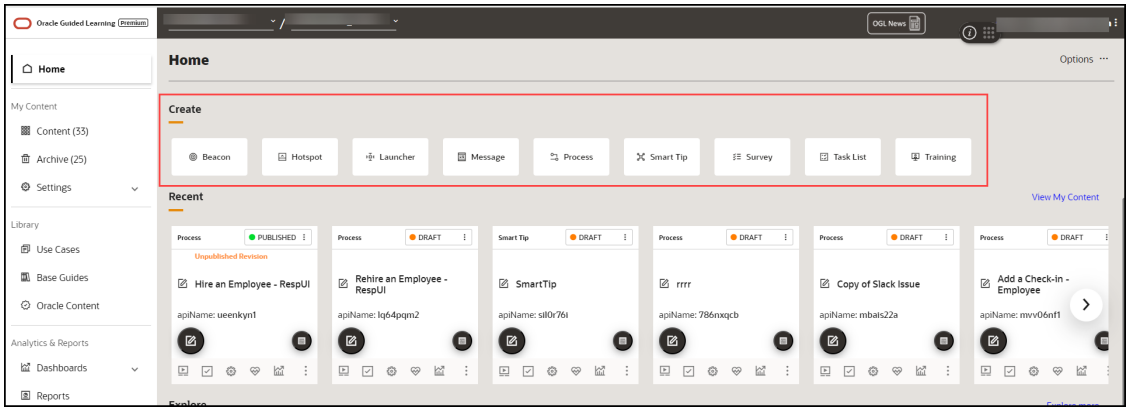
4

Creating OGL Content

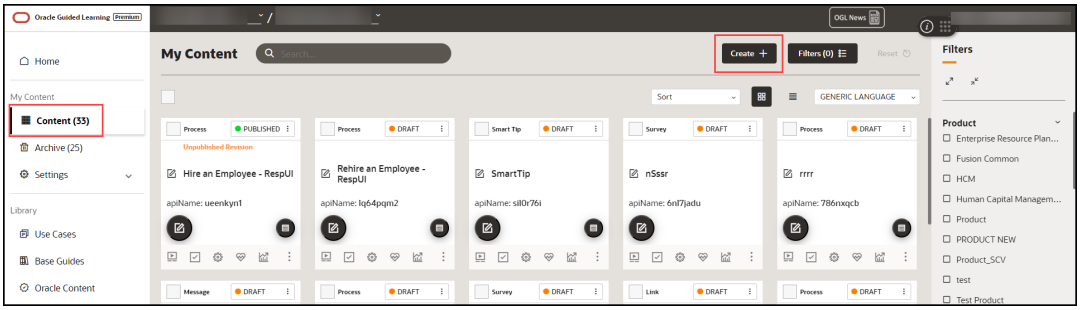
Creating a Guide

Creating a guide on OGL is a seamless process, thanks to its intuitive homepage interface that showcases the entire range of content types that can be created.



To create a Guide:

1. On the homepage, under the **Create** section, select the **Guide** type you want to create.
2. Alternatively, select **Content** on the homepage and then the **Create**(Create +) button.



The content editor opens in a modal tab. The editor appears as an overlay on your application.

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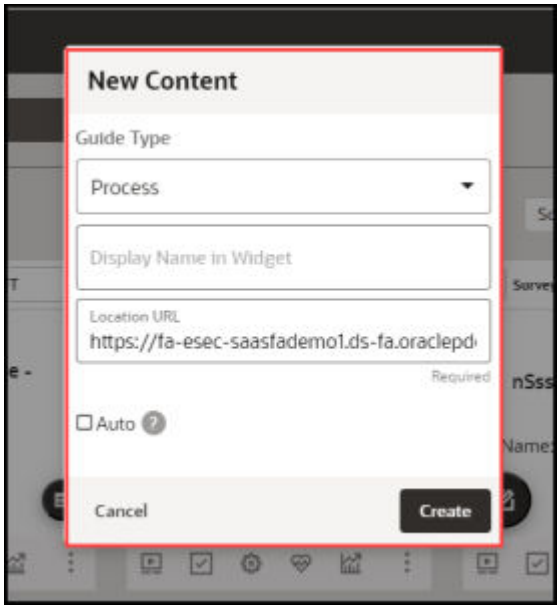
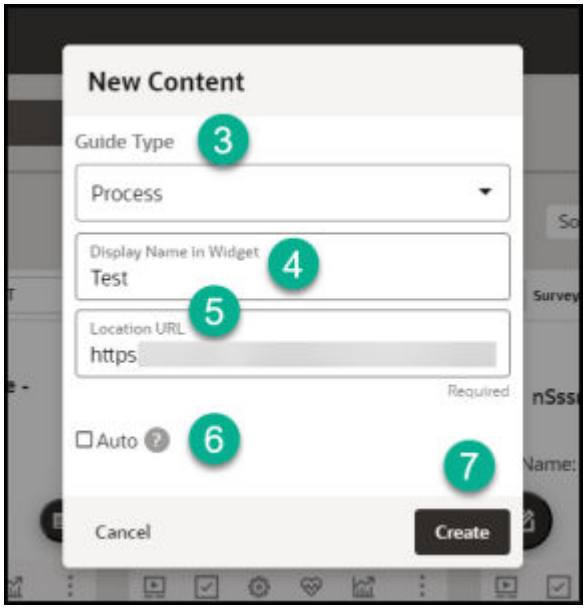


3. Choose the **Guide Type** you want to create.
4. Enter the desired name in the **Display Name in Widget** field.

> **Note**
>
> The following characters are not allowed: **/ \ | : " < > ?**

5. Enter the **Location URL**.



6. Select **Create**.
   The OGL launches the editor now.

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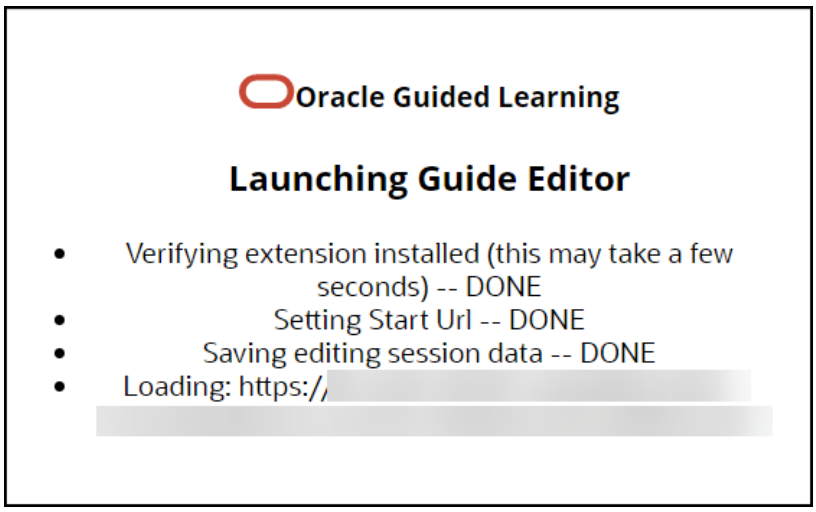
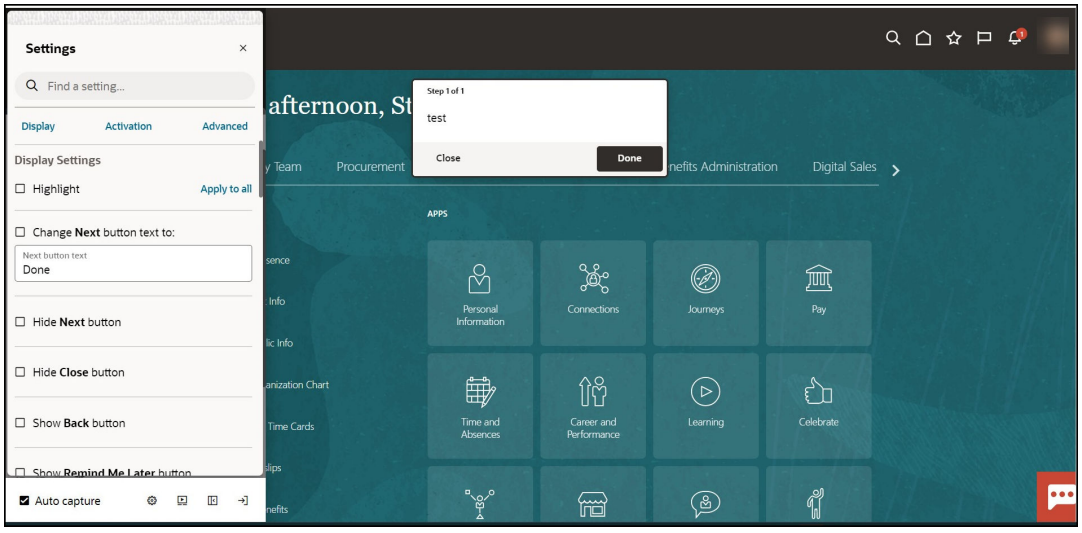


The OGL Editor launches in a new tab, where you can start capturing the steps for the guide.

> **Note**
>
> The editor appears as an overlay on your application.



To create your first step, go to Adding the First Step to a Guide.

Adding the First Step to a Process Guide

After you create a process guide, the OGL Editor appears over the URL you entered. You are prompted to select an element or to create a Splash step:

1. Select **Add a Step** to capture the screen element for your first step.

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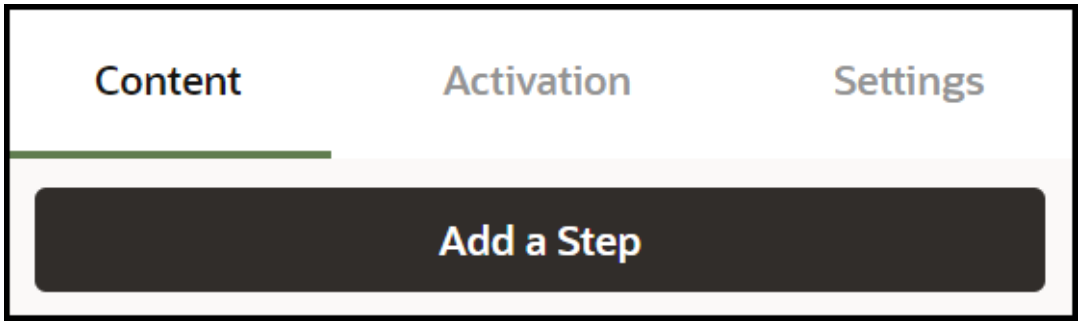
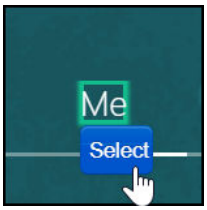
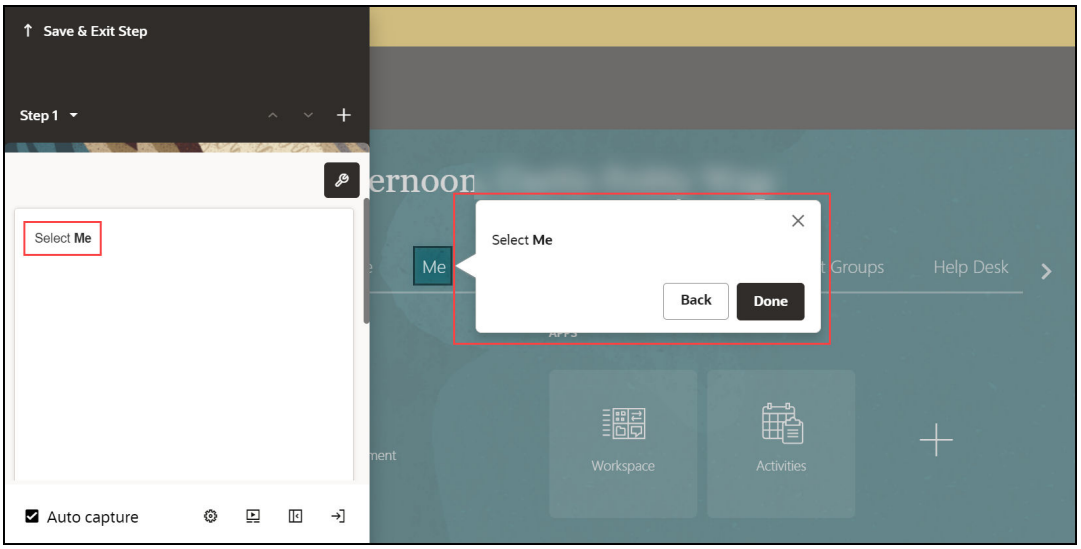


2. Place the cursor on the element which you want it to be the first step and then select the **Select** icon.(Select).



The OGL now fills the step command automatically and displays a real-time preview of the guide.



You can modify the automatically generated step commands according to your preferences.

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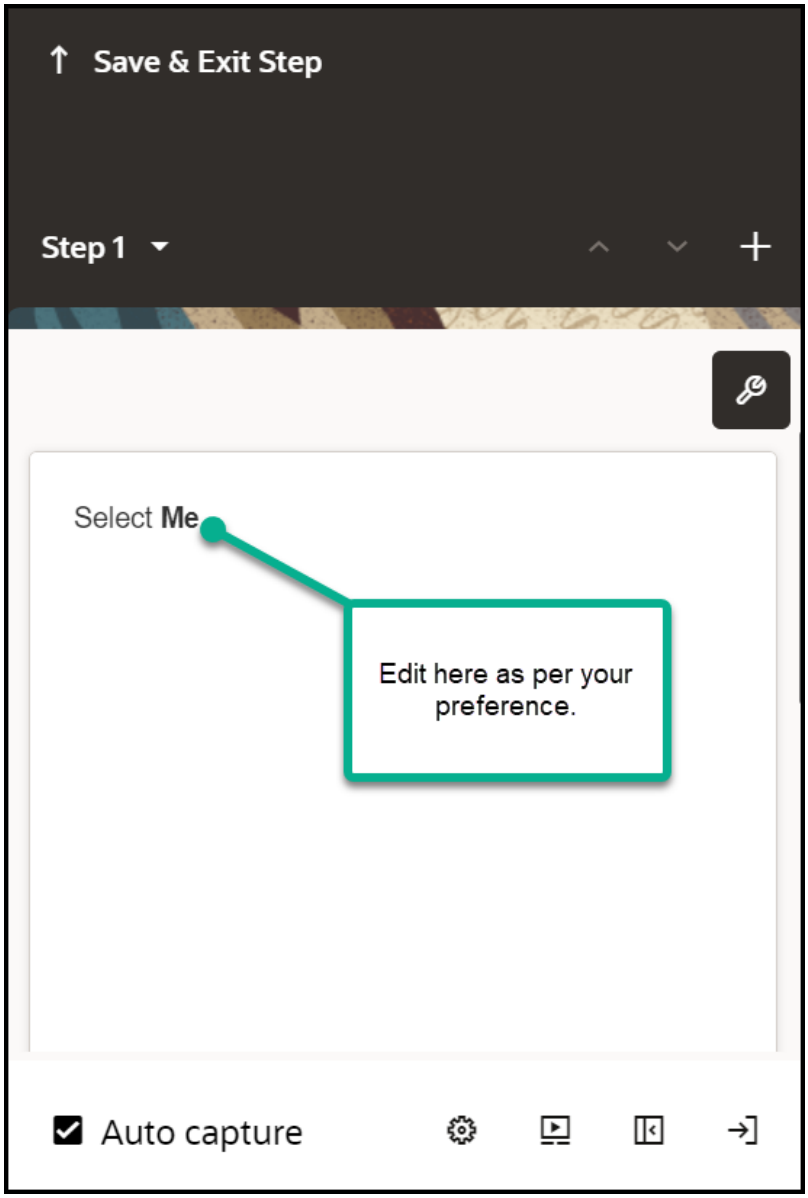

3. Select the **Step Settings** icon ( ).
   The **Step Settings** now appears below the editor.

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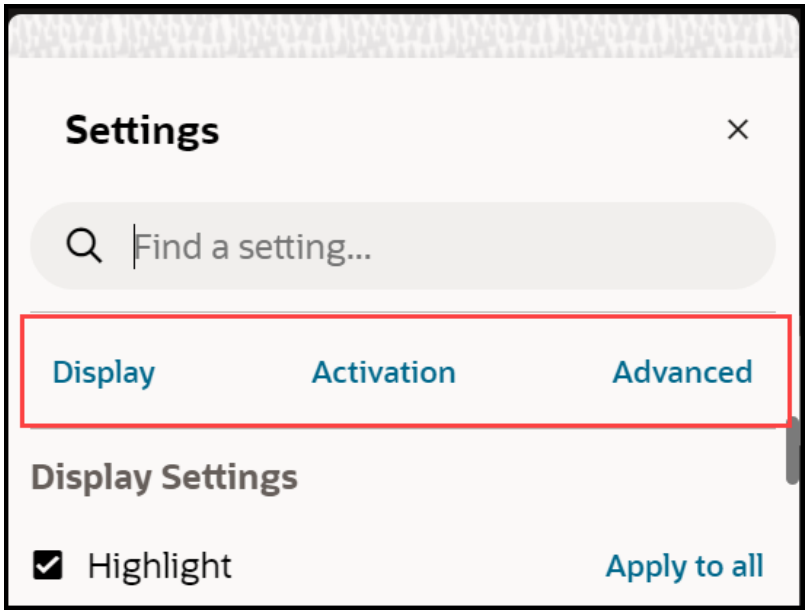

4. Edit the **Display Settings** as per your preferences.
Learn more about **Display Settings**.

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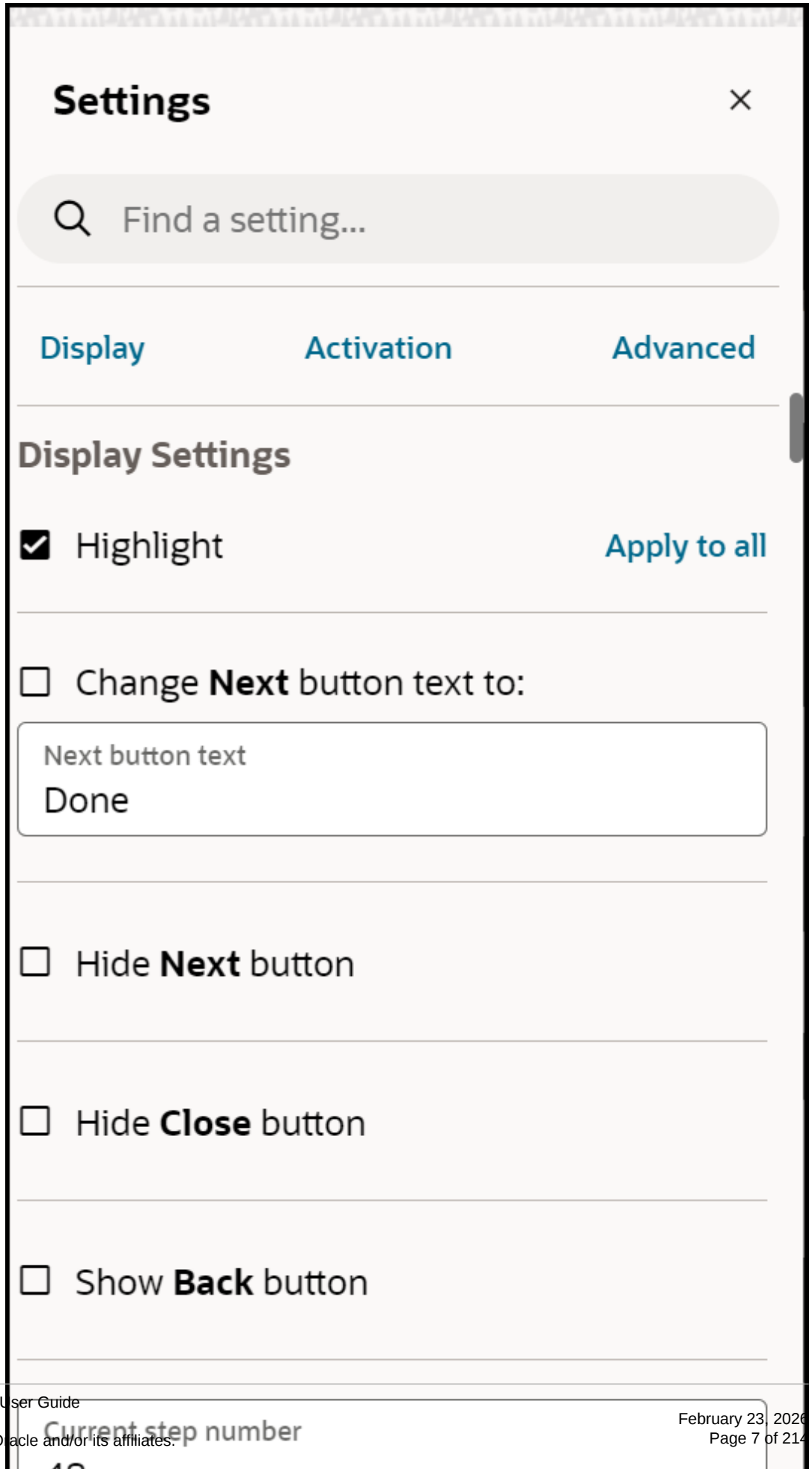

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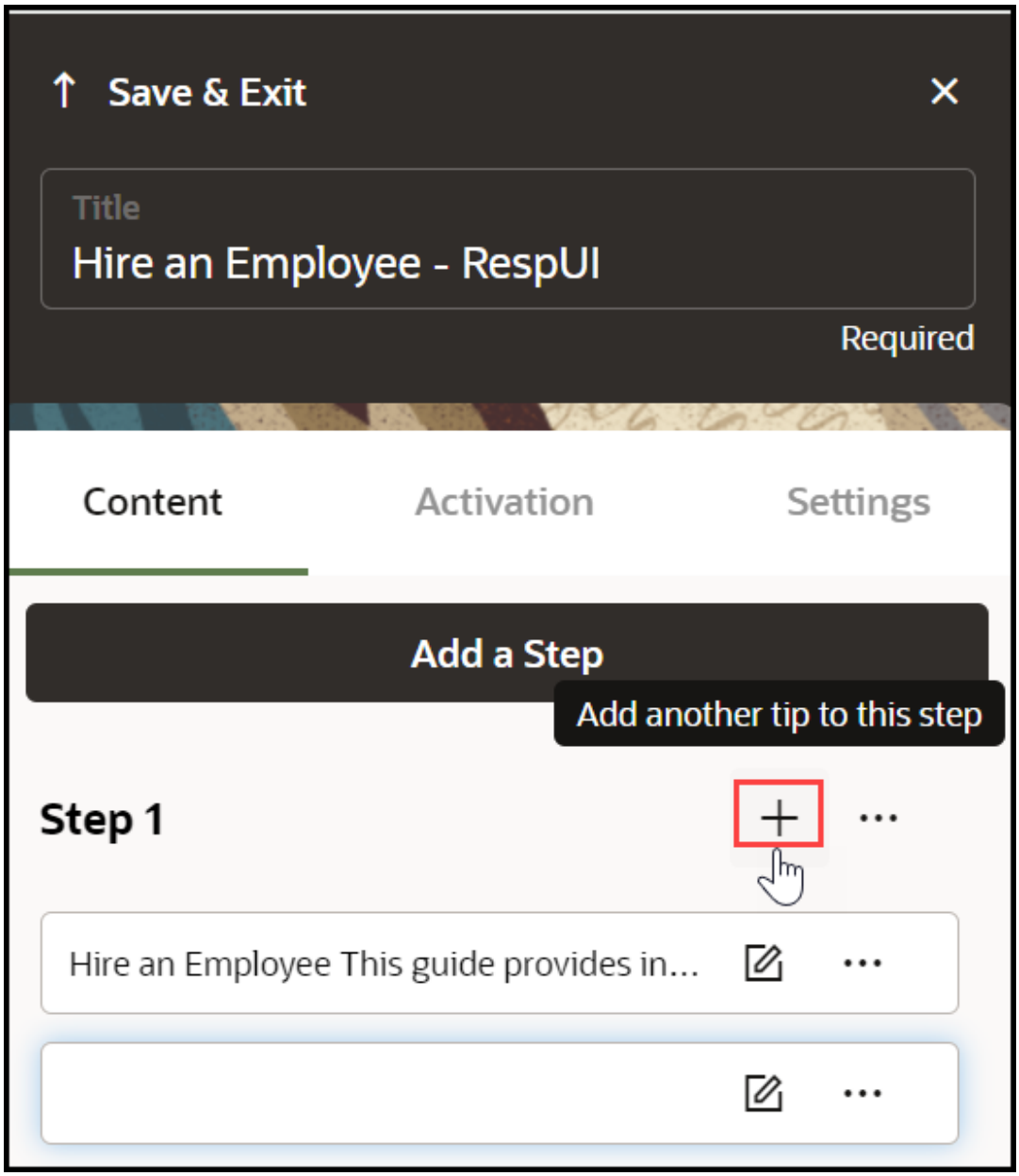
Proceed to add an **Interactive Step**.

Adding an Interactive Step

Interactive steps include clicking or selecting an element within the application.

To add an Interactive Step:

1. Select the **Step** where you want to add the additional step.
   The **Add Step** option appears, which lets you create additional steps.



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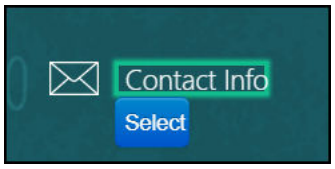
2. Select the next UI element.



3. Edit the step commands (Optional).
4. Open the **Step Settings**.
5. Edit the **Display Settings**:
    a. Clear the **Highlight** check box.
    b. Select the **Hide Next** check box.
    c. Clear **Show back** button if needed.
    d. Choose a different **Tip-placement**.
    e. When finished, select **Save & Close**.

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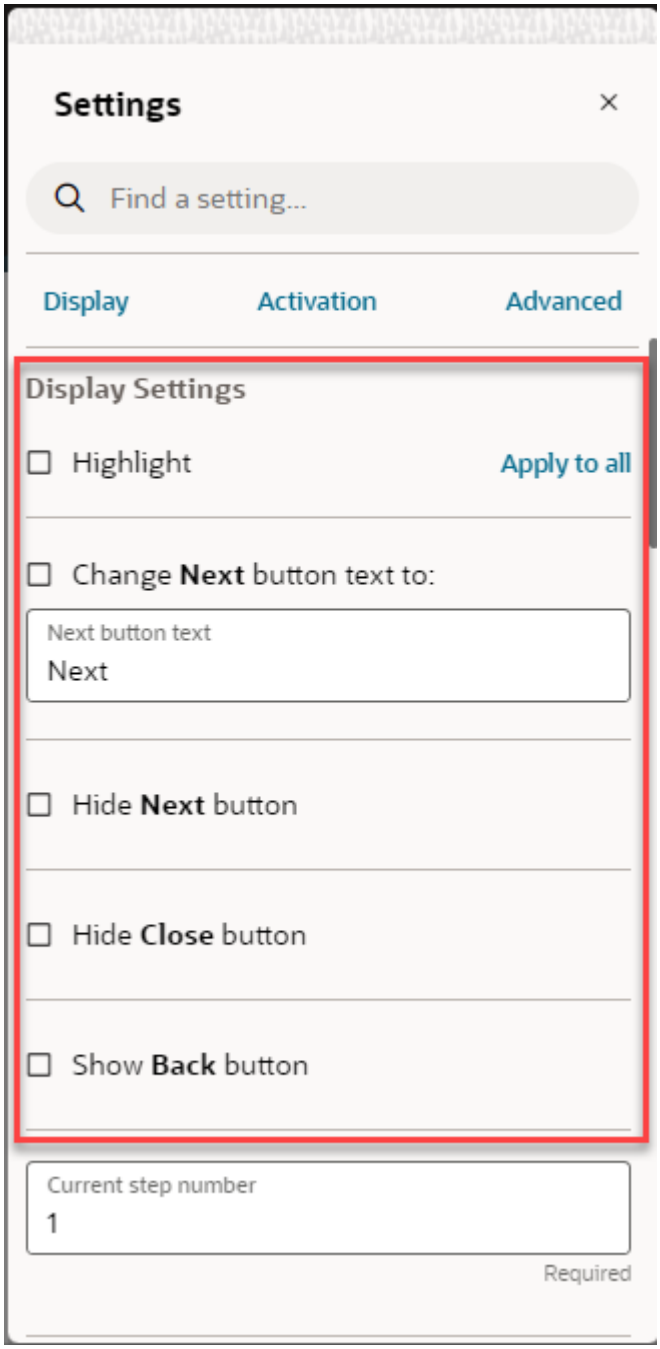

Selecting Targets

Targets are HTML elements within a page to which guides can be anchored and can allow users to interact with, such as selecting or hovering over. Selecting target elements is a combination of art and science. Using the OGL Editor, you can select most targets by hovering over elements and either right-clicking (Control+click for Mac) or choosing the Select button.

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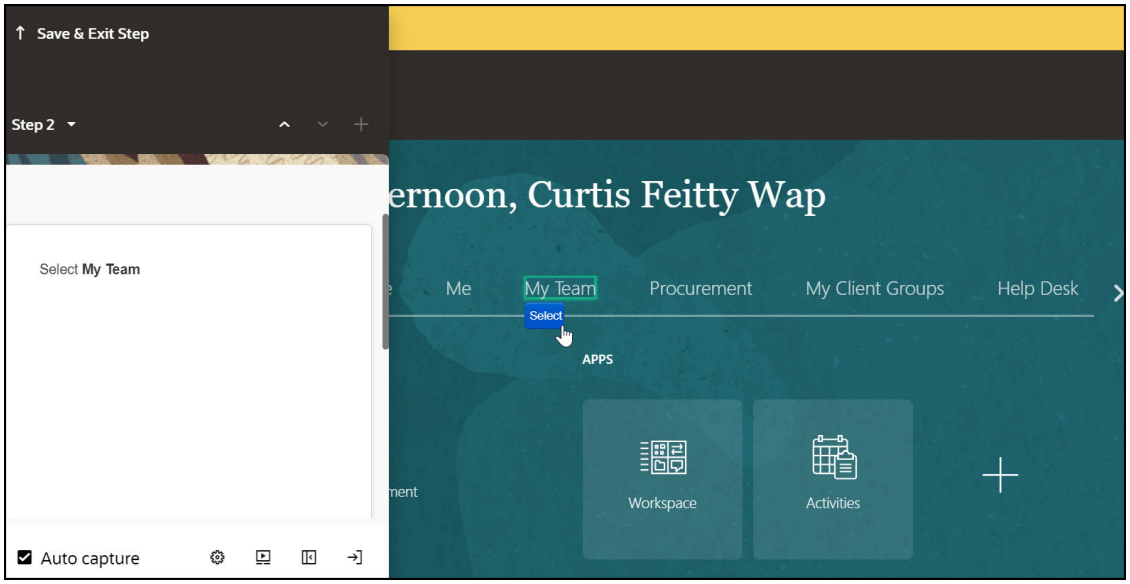
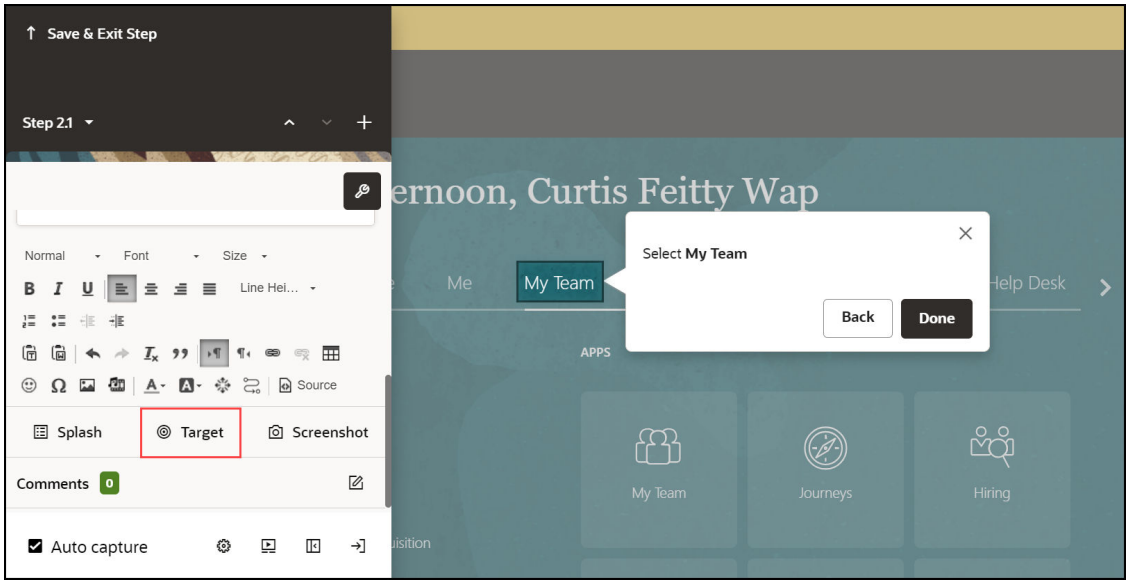


You can select a target at any time by selecting **Target**.



Viewing Selected Targets

You can view the target selector to troubleshoot or see how OGL selected the target.

To update the selector:

1. Select **Change Tip Target**.
2. On the selector dialog, select the **Edit** icon.

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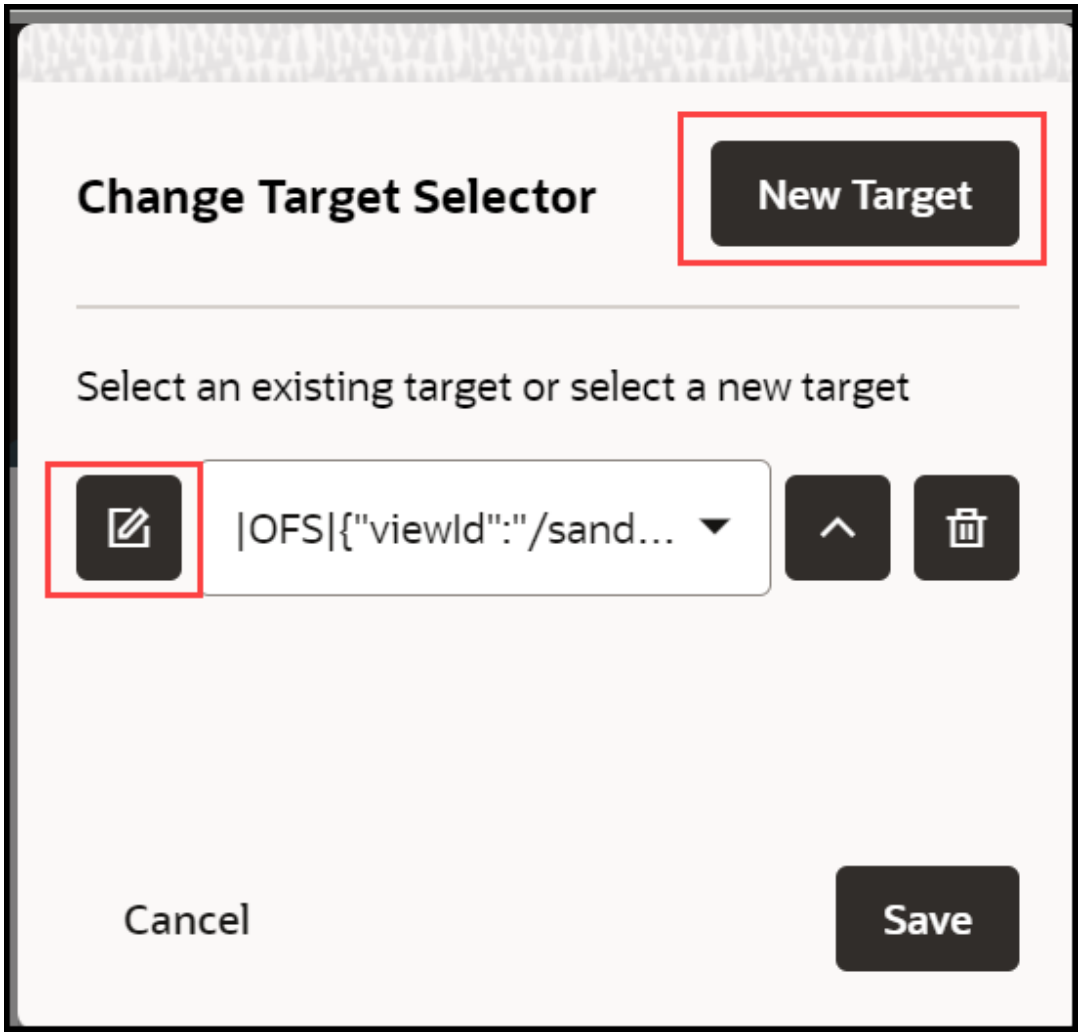

3. Update the selector.
4. Select the check mark to save the new target.

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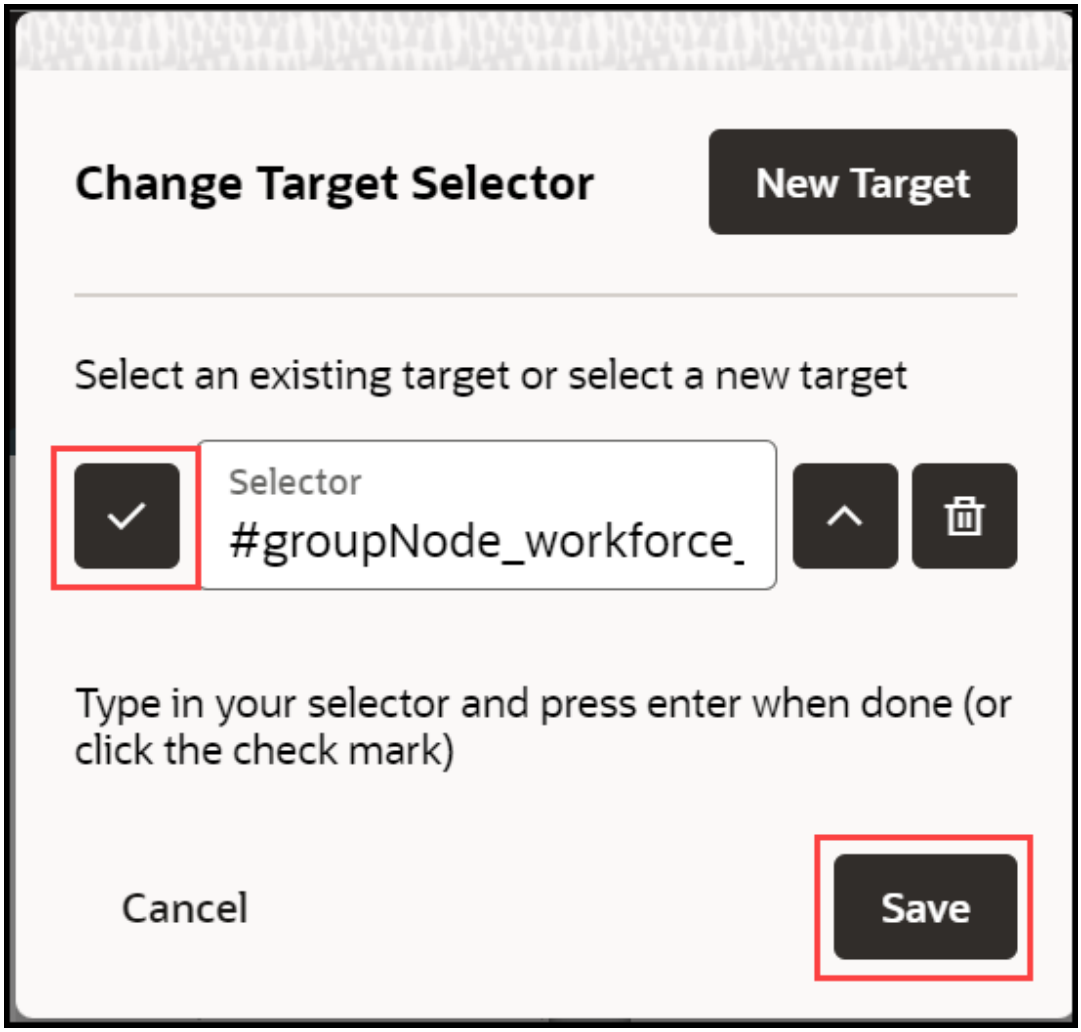

Selectors

OGL supports a variety of jQuery and CSS selectors.

Examples:

- [id$="HRD_CAREERDEV_MANAGER::icon"]
- [id*="HRD_CAREERDEV_MANAGER::icon"]
- span:contains('Career Statement')
- label:contains('Goal Name')
- src:contains('qual_personstar_32.png')
- button:contains("OK"):first

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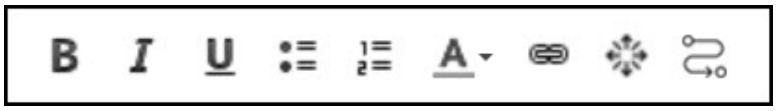
Editing Guide Content

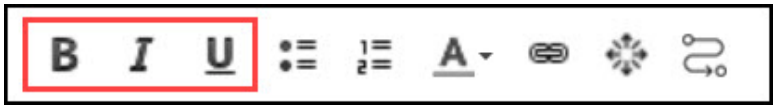
OGL provides a basic editor called the **Content Editor** and an advanced editor called the **Full Editor**. The Content Editor is used primarily for basic editing and formatting, while the Full Editor allows for more advanced editing and configuration of guides, including Display, Activation, and Advanced Settings. You can do most of your work in the Content Editor, but you will need to open the Full Editor from time to time to apply more advanced settings. The underlying content is created in HTML, which you can also access through the Full Editor.

With the Content Editor, you can:



1. Apply **Bold**, **Italics**, or **Underlines** to the text.
2. Create a bulleted list.
3. Change text color.
4. Add hyperlinks.
5. Insert a variable.
6. Add a title as an H1 paragraph.
7. Add a link to another guide.

To add Bold, Italics, or Underlines:



1. Select desired text.
2. In the editor, select the **Bold**, **Italics**, or **Underline** icon.

To add a bulleted list:

1. Select desired lines.
2. In the editor, select the **Bulleted List** icon.

To add a numbered list:

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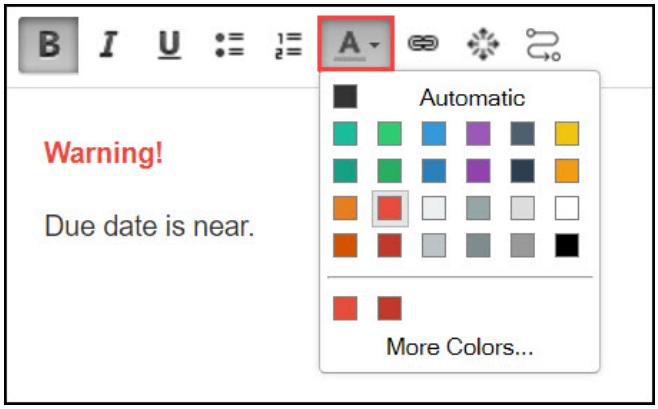
1. Select desired lines.
2. In the editor, select the **Numbered List** icon.

To change the color of the text:

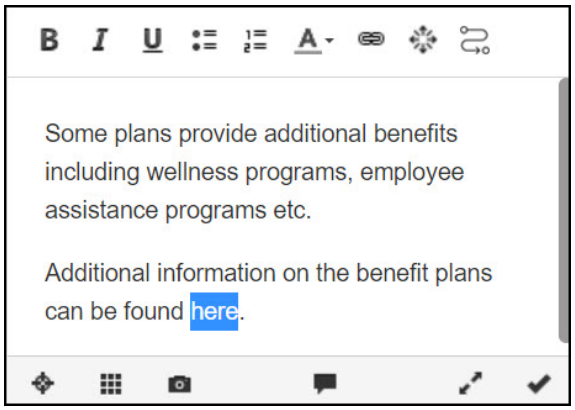


1. Select desired lines.
2. In the editor, select the **Text Color** icon.
3. Choose the desired color.

Hyperlink in a Step:

To add a hyperlink to step text within a guide:

1. Select the tip and enter the descriptive text.
2. Select the text that you want to turn into a hyperlink.



3. Select the **Hyperlink** icon.

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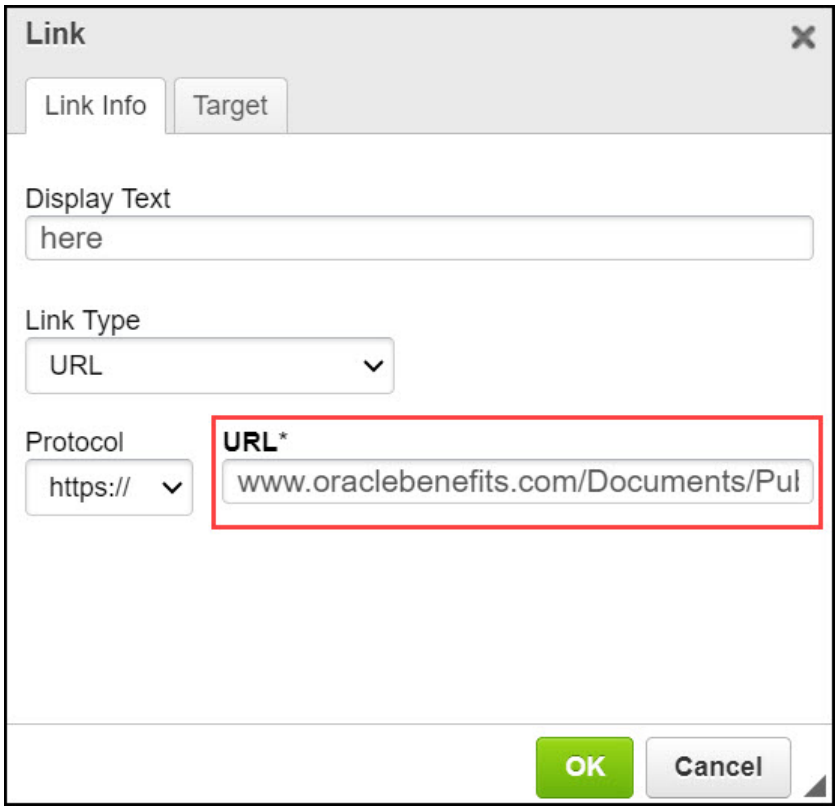
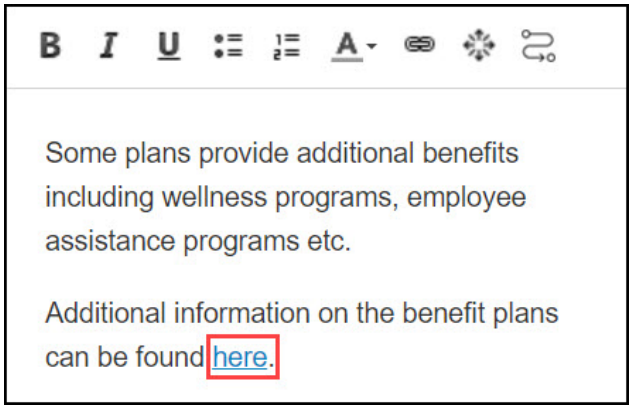
The **Hyperlink** modal window is displayed.

4. Enter or paste your hyperlink and select **OK**.



The selected text is now turned into a hyperlink.



Embed Media:

Your guide can include a picture, video, audio, or other multimedia content.

To embed media:

1. From the tip editor, open the full editor.
2. Select the **Embed Media from External Sites** icon.

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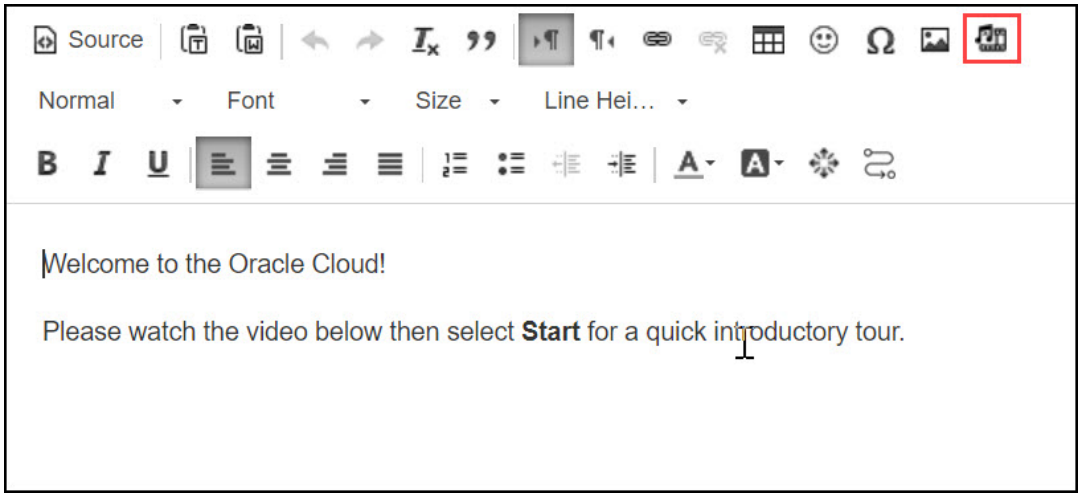
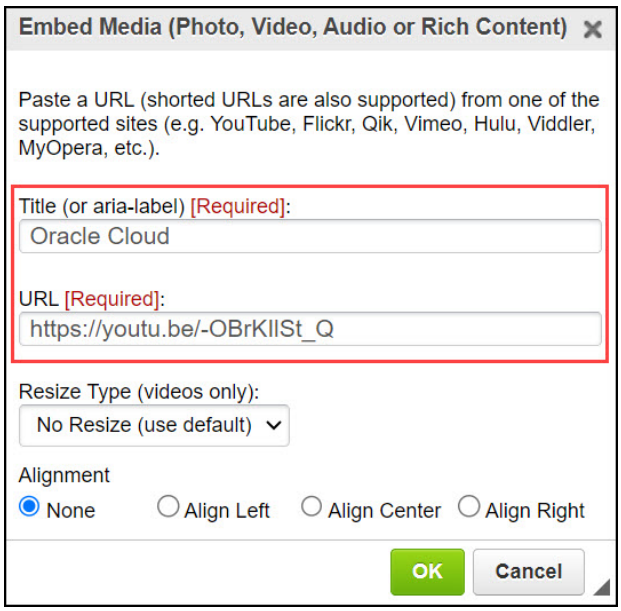


The **Embed Media** modal window is displayed.

3. Enter the **Title** of the media.
4. Enter the **URL** of the media.



5. Resize the media if required. (**Only valid for videos.**)

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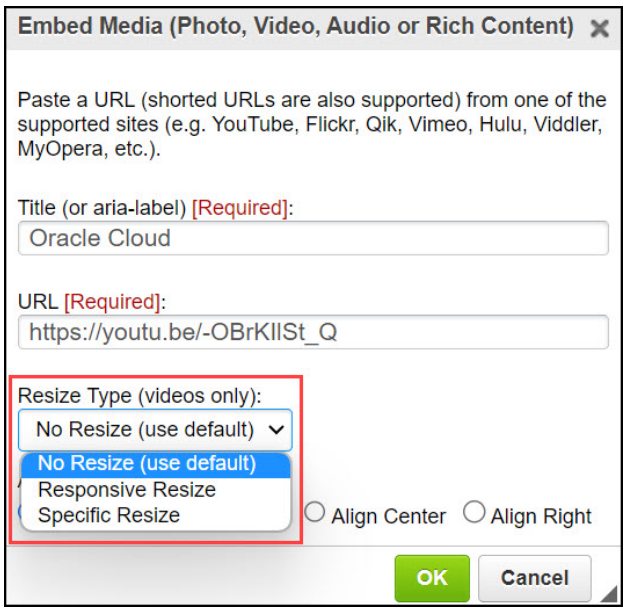
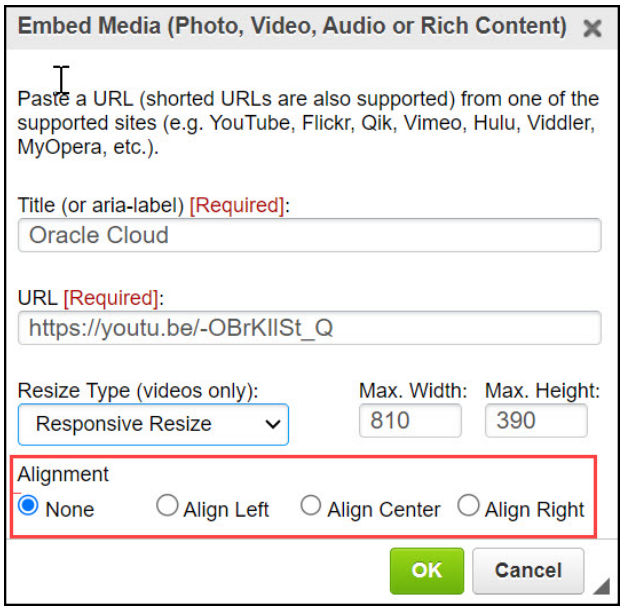


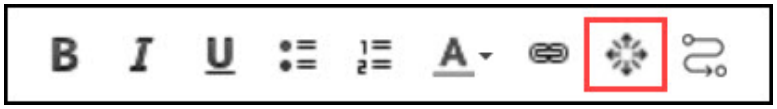
6. Select the desired **Alignment** option.



7. Select **OK**.

To add Session Variable Properties:

1. On the desired step, select **Iridize Session Variables** icon.



The Session Variables modal window is displayed.

2. Enter the **Variable Name** and **Variable Value**.

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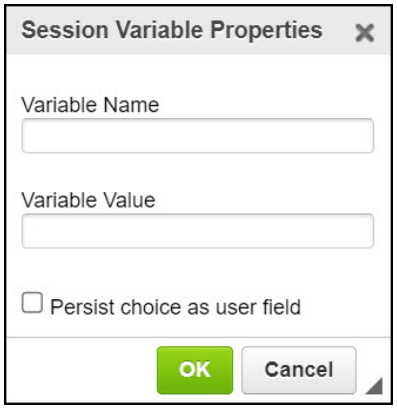


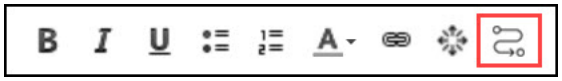
3. Select **OK**.

Launch a Guide:

With the **Launch a Guide** feature, you can now easily include a link to a relevant guide within your guide. With this feature, users can easily find and access the related guide they are looking for.

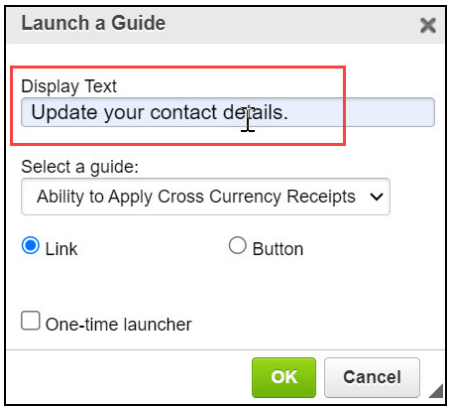
To insert the link to another guide:

1. Go to the desired guide.
2. Select the desired step.
3. Select the **Launch a Guide** icon.



The **Launch a Guide** modal window is displayed.

4. Enter the display text.



5. Select the existing guide from the dropdown to link it with the current guide.

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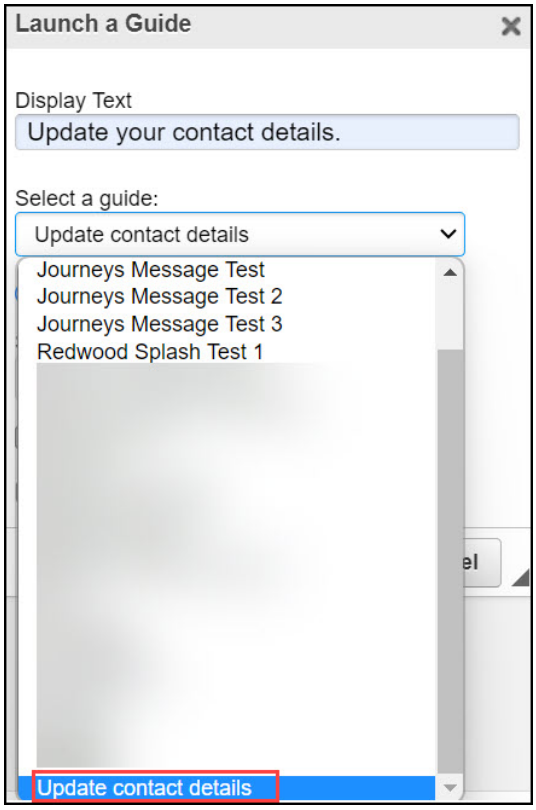
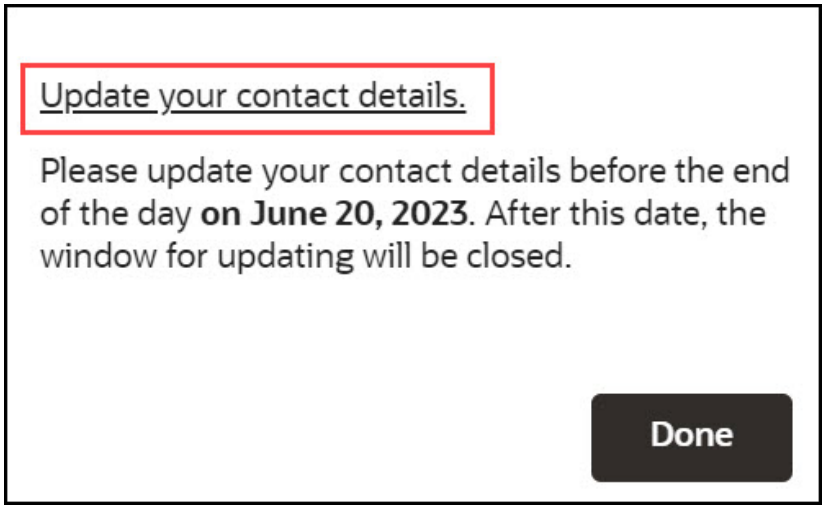


6. Select the desired display option (Link or Button).
Link view:



Button view:

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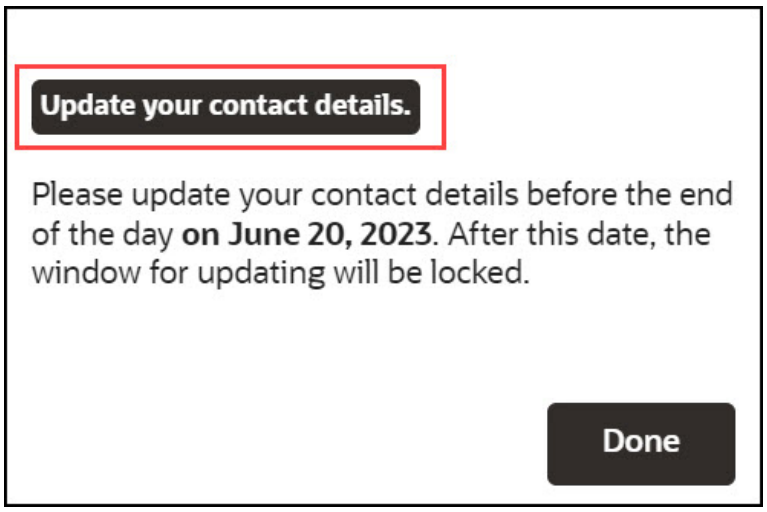

7. Choose the starting step to be shown in the guide.
8. Check the option "**Keep this guide running**" to keep the main guide running, even when the new guide is launched.
9. Check the option "**One-time launcher**" to restrict the guide to launch only once.
10. Select **OK** to save.

With the OGL Editor, you can:

Add a Splash Tip:

Splash steps are also known as modal or lightbox steps. They are non-interactive informational steps that draw attention by graying out the background and focusing the user on the step itself. Splash steps are common at the beginning and end of a flow to describe the objective of the flow and summarize what the user learned.

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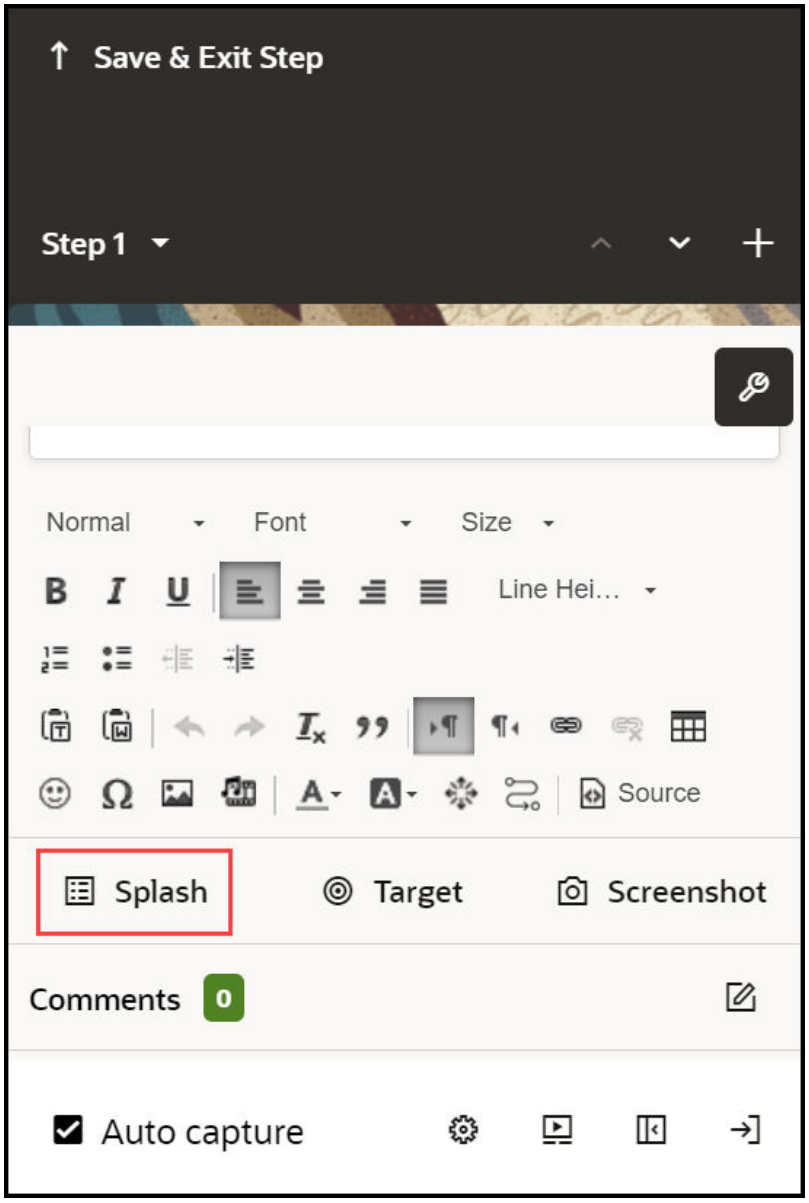

The tip's background appears greyed out because of the activated splash tip feature.

When you create a new tip, select Add Splash. However, change the target to just “body” if you need to update an existing tip.

Change the tip target to the body:

1. Select **Change Tip Target**.
2. On the selector dialog, select the **Edit** icon.

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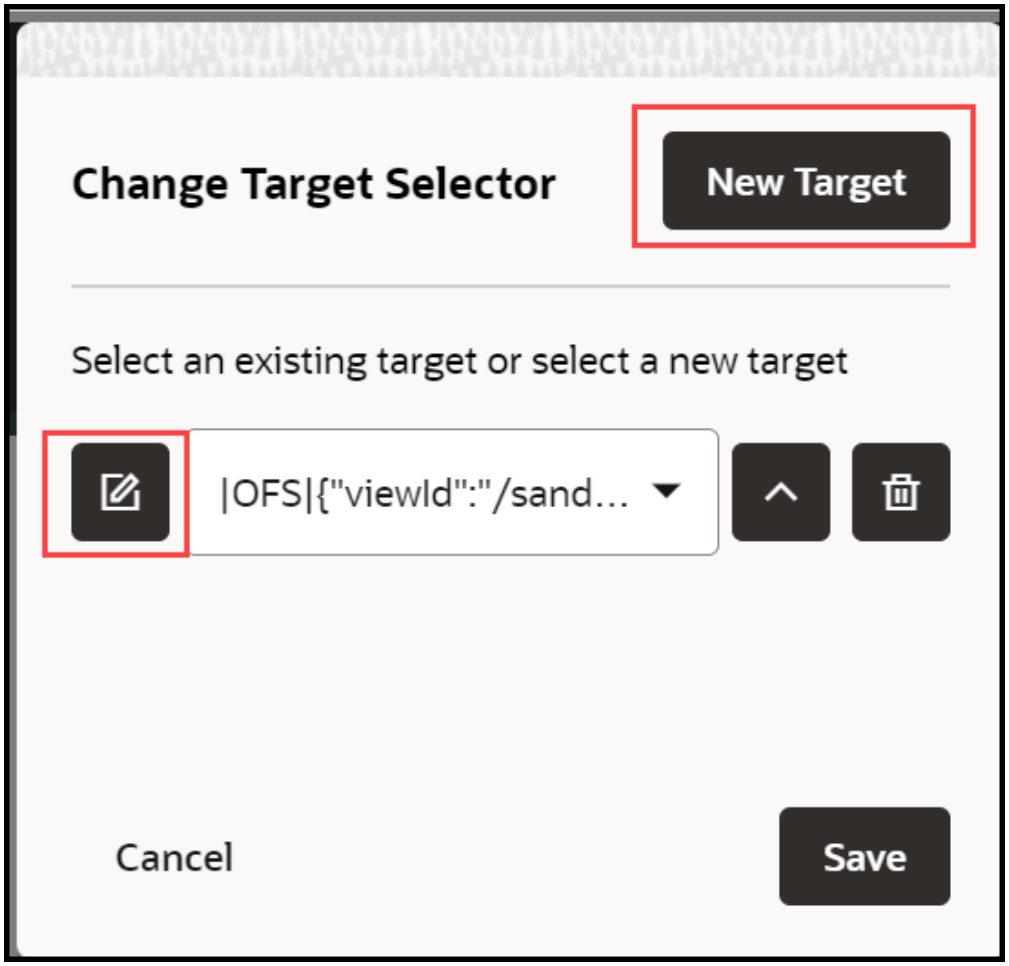

3. Update the selector
4. Click **Save** to save the new target.

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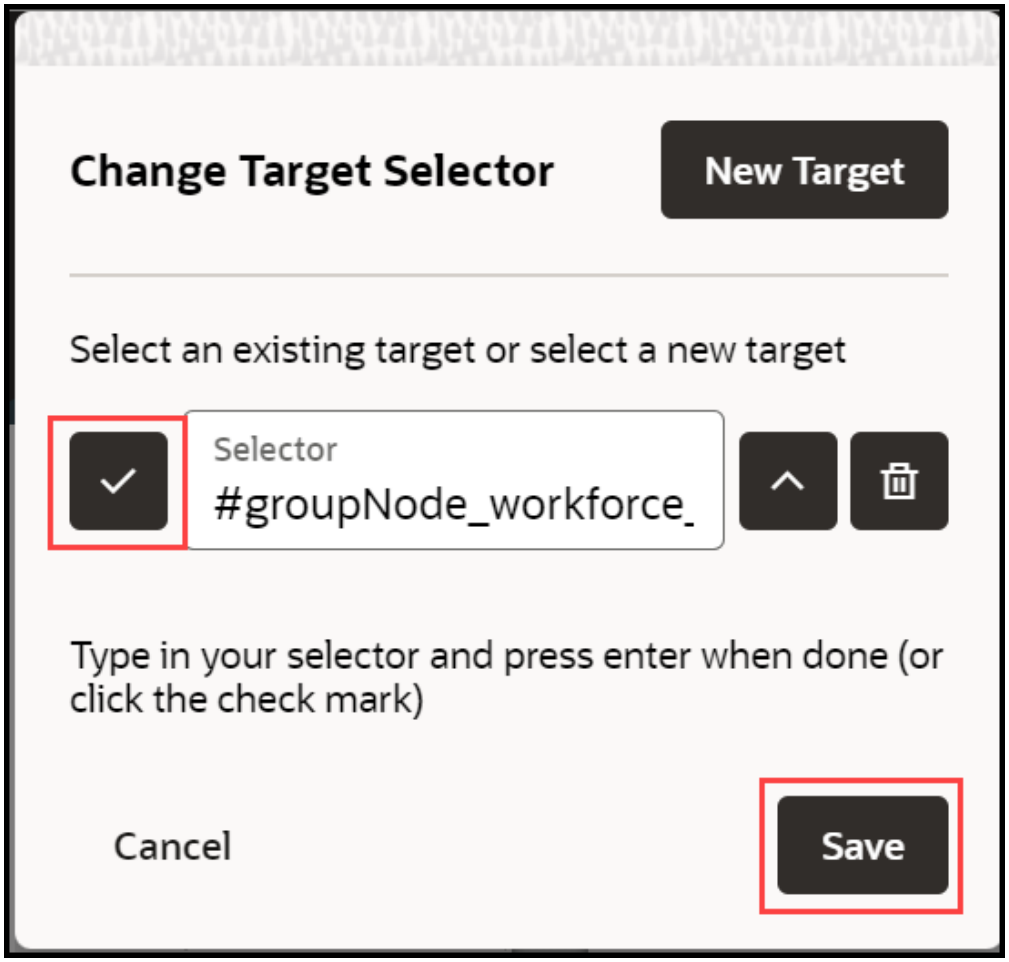

5. Close the selector dialog, and then select **Display Settings**.
6. Change the **Highlight** option to **Border and Overlay** or just **Overlay**.

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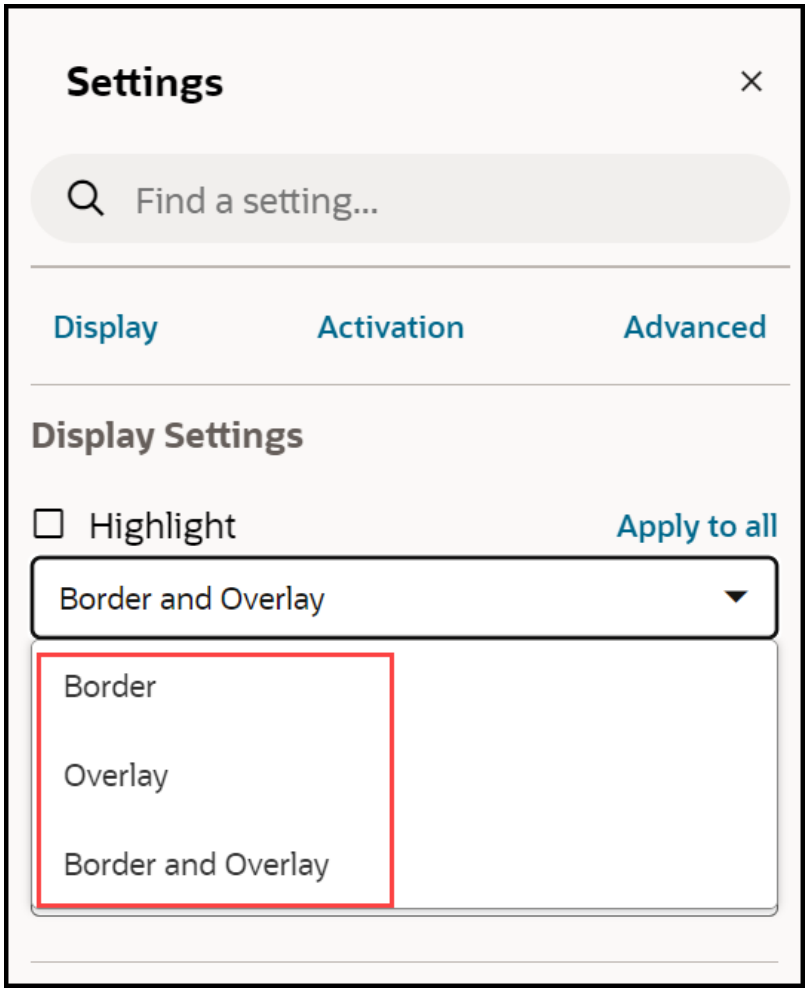

Adjust Tip Size:

Follow the tip sizing guidelines when adjusting the tip size.

1. Open the step **Display Settings**.
2. Select the tip size (default value: 280px), and then enter your new size.

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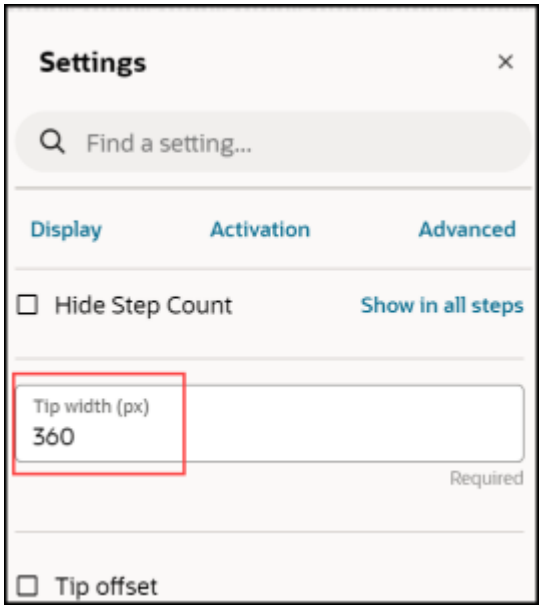

3. Press Enter.

Creating Optional Steps:

1. Open the **Activation Settings**.
2. Check the option **Skip if element not found OR conditions not met**
3. Select **Add Conditions**, next to Step Conditions.

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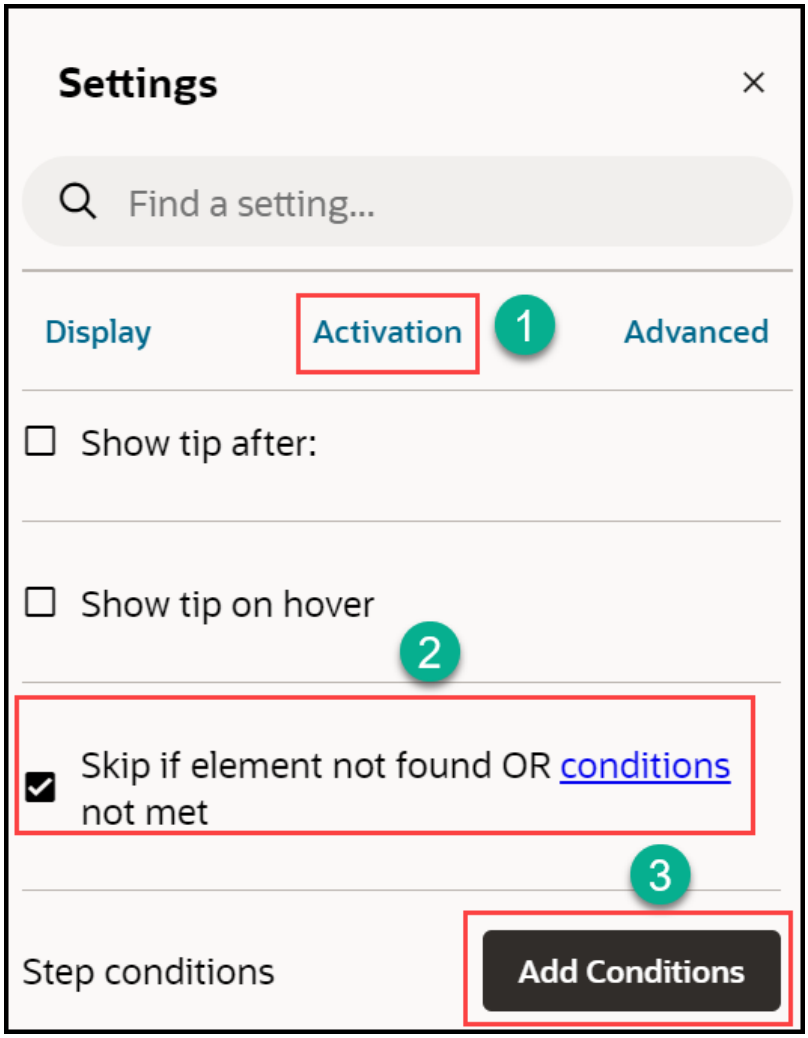

4. Select **When page** > **has** > **element**.
5. Select the **Pick a Selector** icon.

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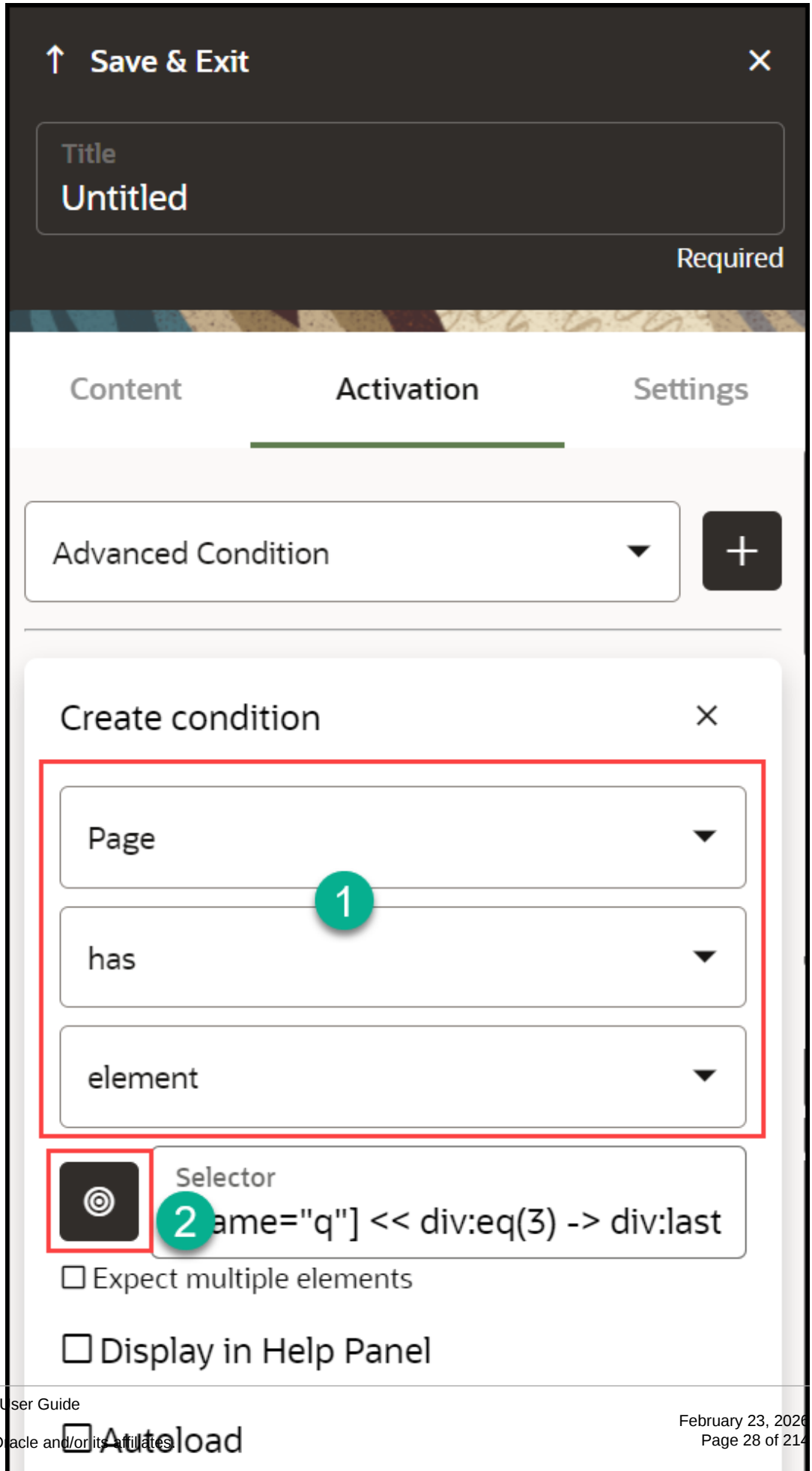

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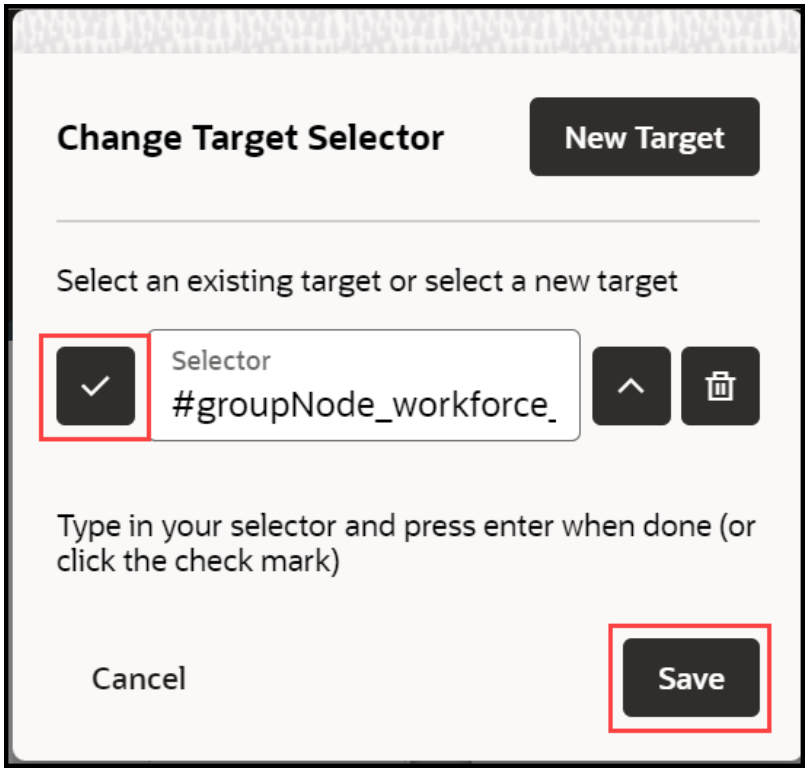
6. Select an element or, select the **Edit** ( ) icon in the selector dialog, and enter a selector.
7. Select the checkmark icon.
8. Select **Save**.



9. Select **Save & Exit** under **Edit Step Conditions**.

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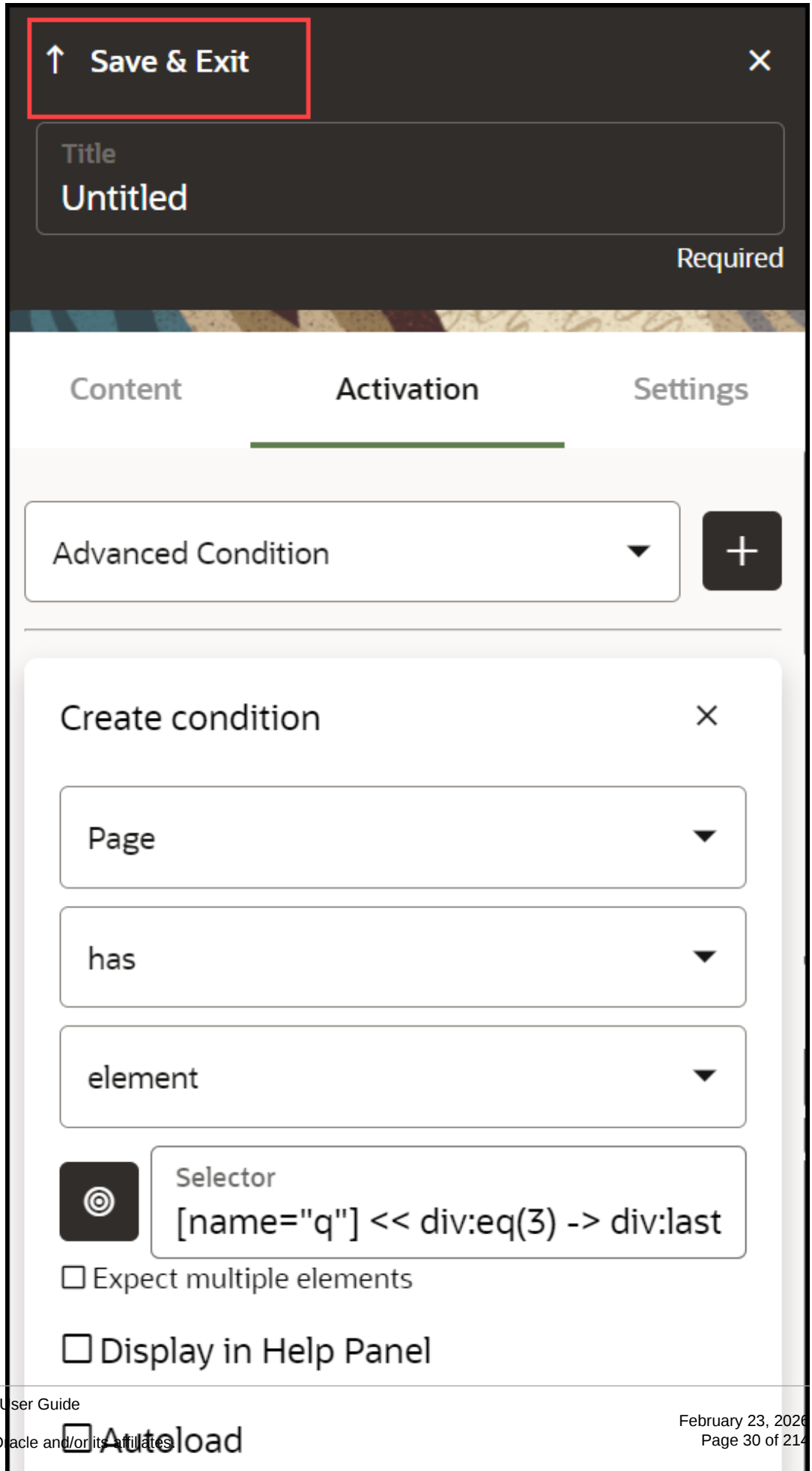

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Changing a Tip Position:

In addition to specifying the general position (top, bottom, left, and right) you can enter offsets in pixels to precisely position tips.

1. Open the **Step Settings**.
2. Expand **Display Settings**.
3. Choose a location in **Tip Placement**.

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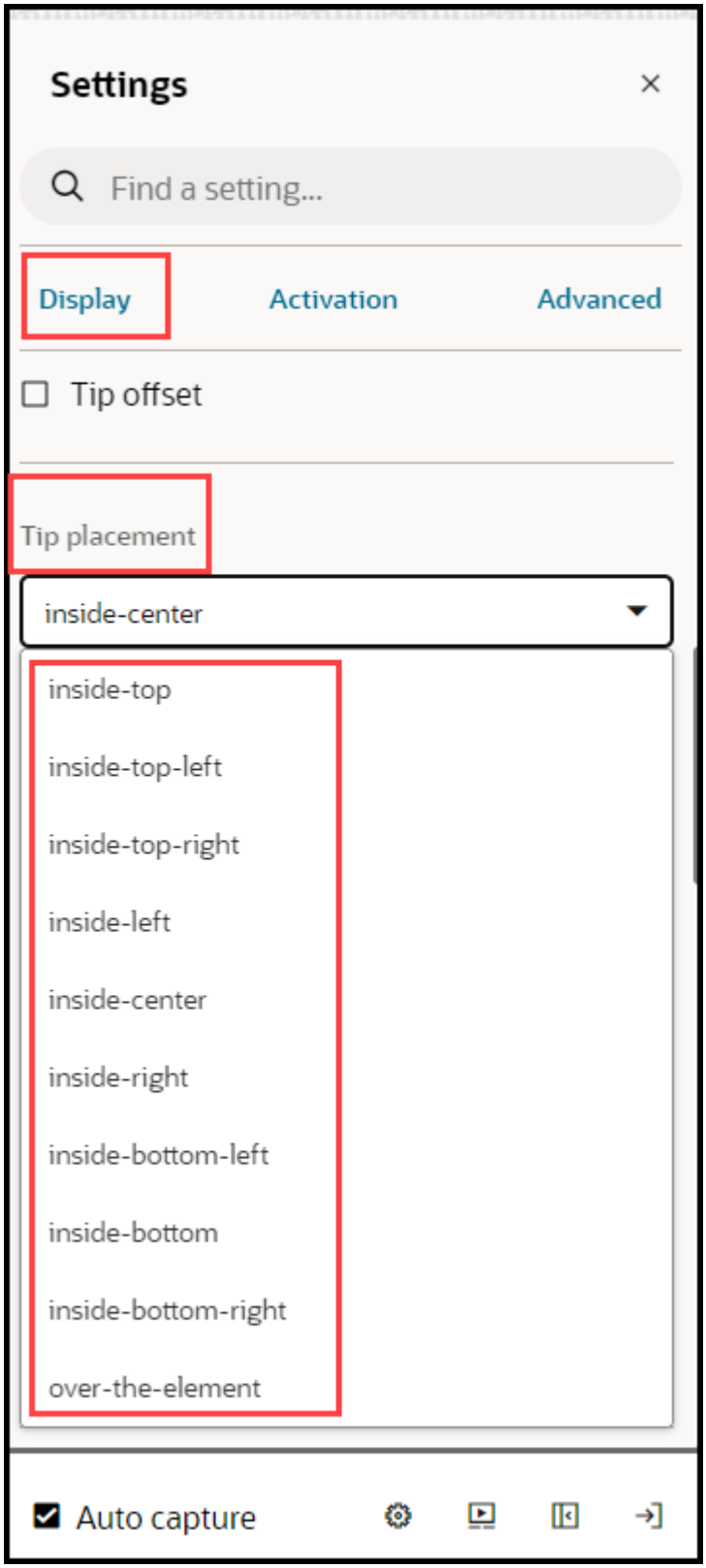

To get more precise:

4. Select **Tip Offset**.

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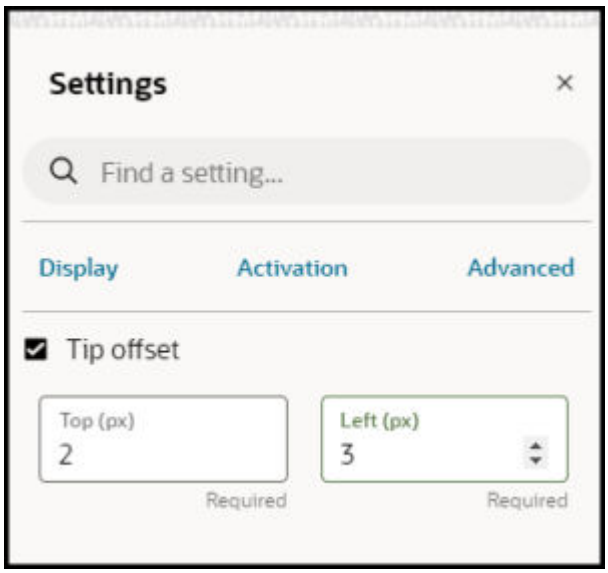
5. Enter numbers in pixels to adjust the placement. These are offset from values, so positive numbers will move the step down or to the left. Negative numbers will move the step up or to the right.



Working with Step Settings

This section includes details about some of the more complicated step settings. See the Step Settings section for details about all the step settings.

Adding Step Conditions

Step conditions define when a step appears. You can use step settings to create an optional step or set up multi-tip steps where only one tip shows at a time.

To add a step condition:

1. Go to the **Step** on which you want to add the condition.
2. Click **Edit** tip icon.
3. Select Step Settings icon.
4. Click **Activation Settings**.
5. Click **Add Condition**.

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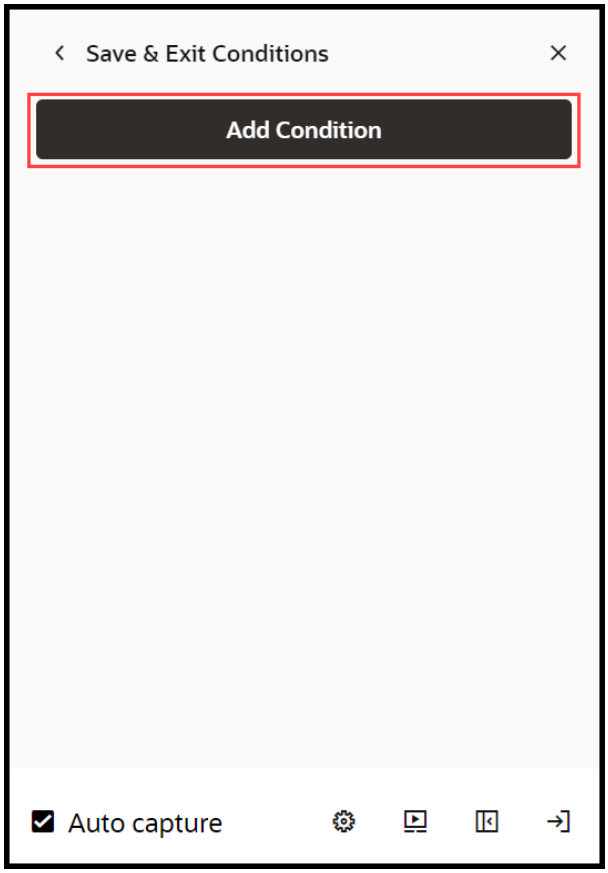

6. Configure your expression.
When configuring an element expression, use the target selector to choose an element. Uses of some common expressions:
   - **when page has element:** to have the tip appear when a certain element is on the page
   - **when page has not element:** to have the tip appear when a certain element is not on the page
   - **when page has visible element:** to have the tip appear when a certain element is visible on the page
   - **when page has not visible element:** to have the tip appear when a certain element is not visible on the page
   - **when page has URL matching:** to have the tip appear on a certain page. Note, for Fusion application, you cannot use the actual URL and must use the route. This is advanced functionality and, if needed, contact support.
   - **When page has not form field with value 'ogl':** The tip will appear when the specified form field is either absent or present with a value other than 'ogl'. If the 'Require Field Presence' option is enabled, the tip will only appear when the form field must be present and contains a value other than 'ogl'.
7. Select **Done**.

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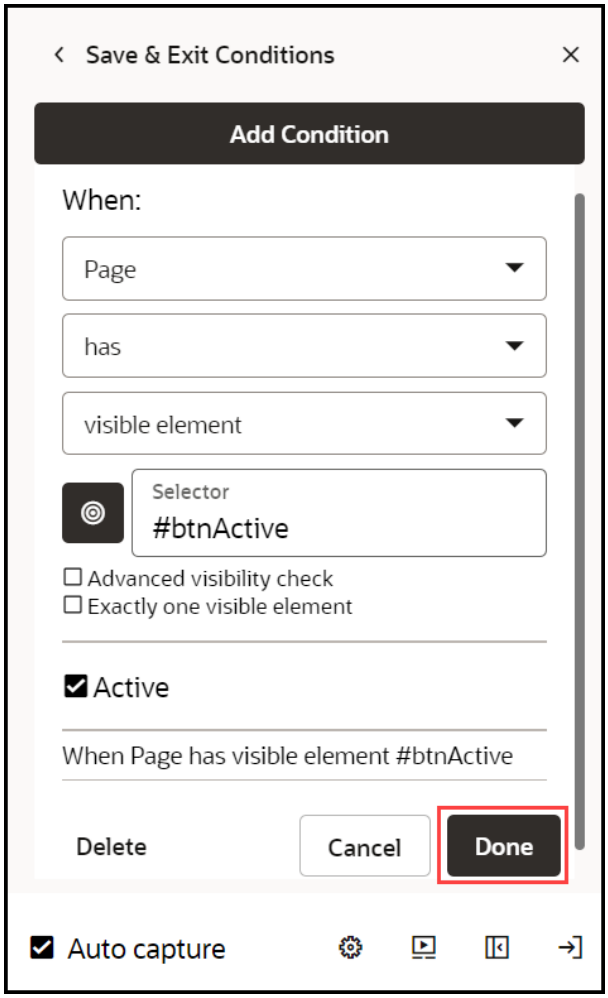

8. Select **Save & Exit Conditions** .

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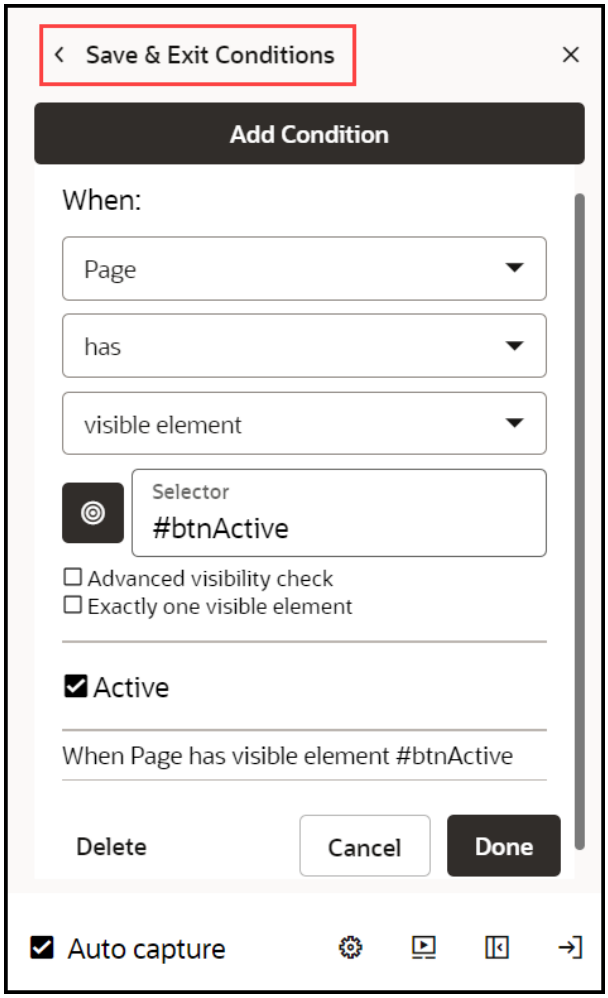

Adding Branches

Branches allow you to specify where the guide goes after a user completes a step. You can go to a step within the guide, open another guide, close the current guide, or launch cross-domain or cross-app guides.

1. Open the **Step Settings**.
2. Expand **Advanced Settings**.
3. Select **Add**, next to **Step Branches**.

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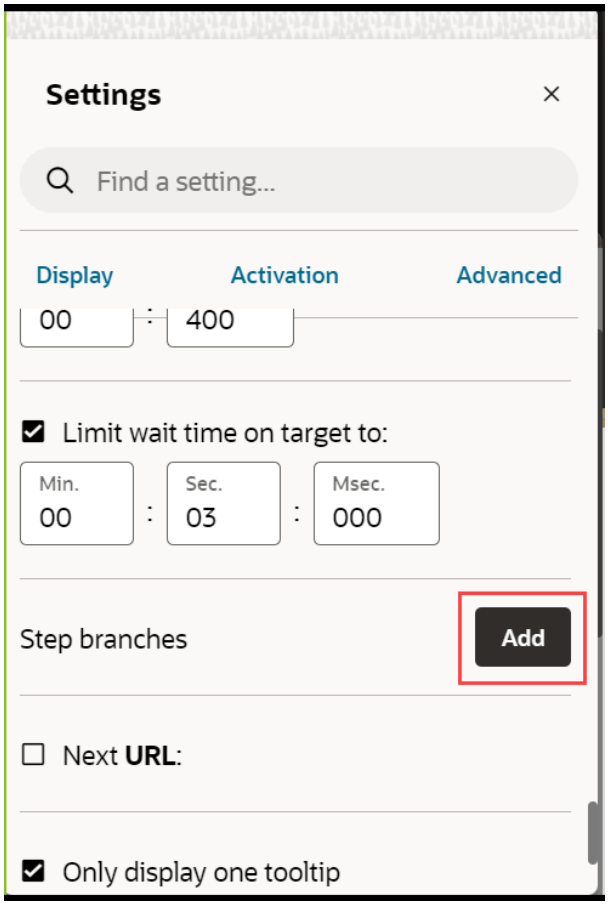

4. Select **Add Branch**.

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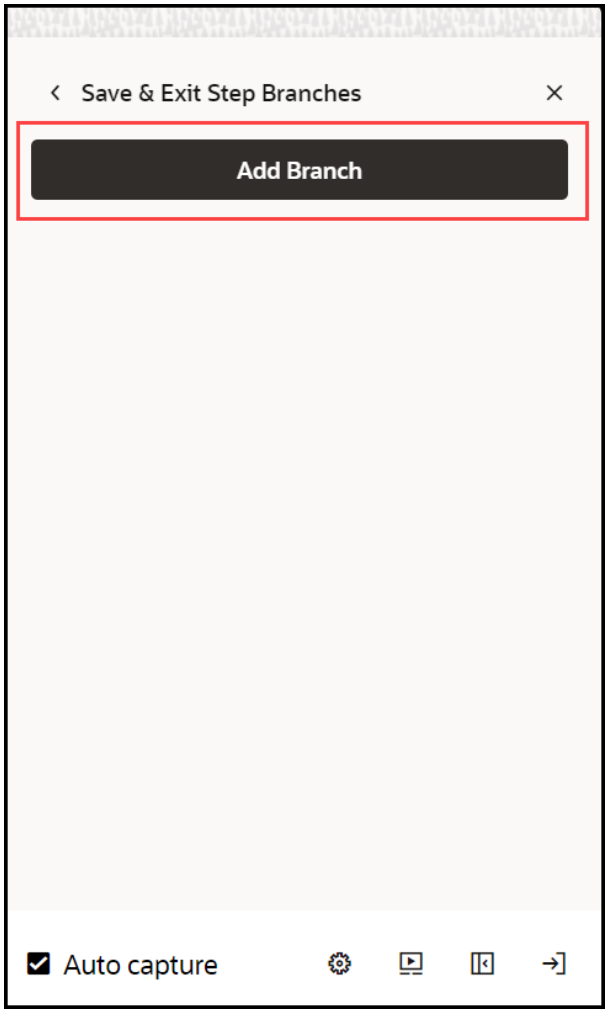

5. Choose the desired **Branch Type** from the dropdown.

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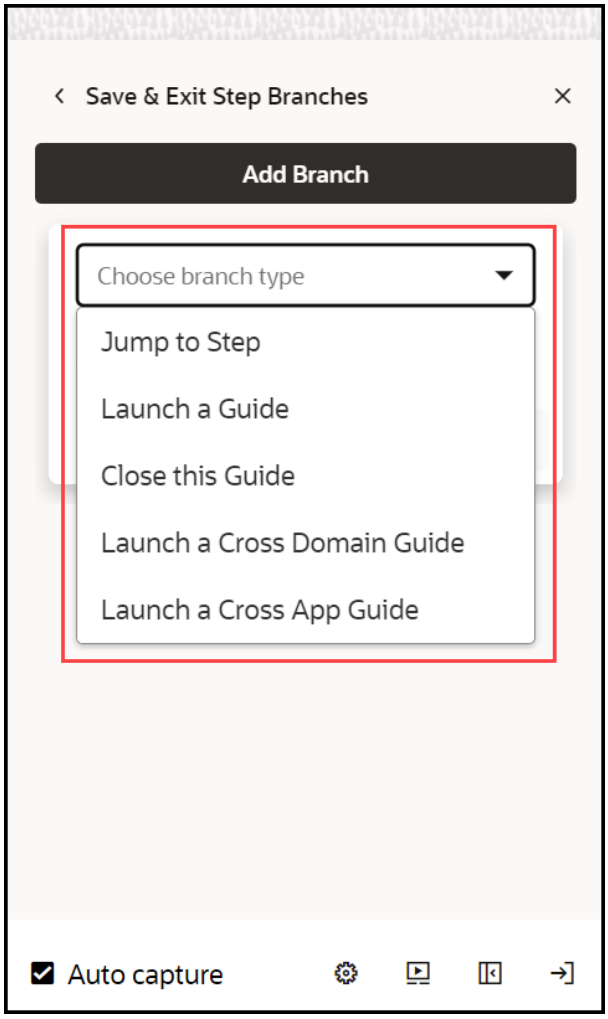

Branch types include:

- **Jump to Step:** Go to a specific step within the current guide
- **Launch a Guide:** Go to another guide at a specified step
- **Close this Guide:** End the guide
- **Launch a Cross Domain Guide and Launch a Cross App Guide:** These are advanced features and we recommend contacting support for assistance if the guides are needed

6. Optionally add conditions that affect when to branch
7. Select **Done** under **Add Conditions**.
8. Select **Done** under **Edit Branches**.

Working with Tabs and Multiple Tips

In any guide, each step can display one or more tips simultaneously. This setup is commonly found on steps that include **Smart Tips** or the first few steps of a guide that can vary depending on what is on the page.

1. To add a tip, select the step where you would like to add another tip, and then select the **Add** (+) icon in the **Step Settings** panel.

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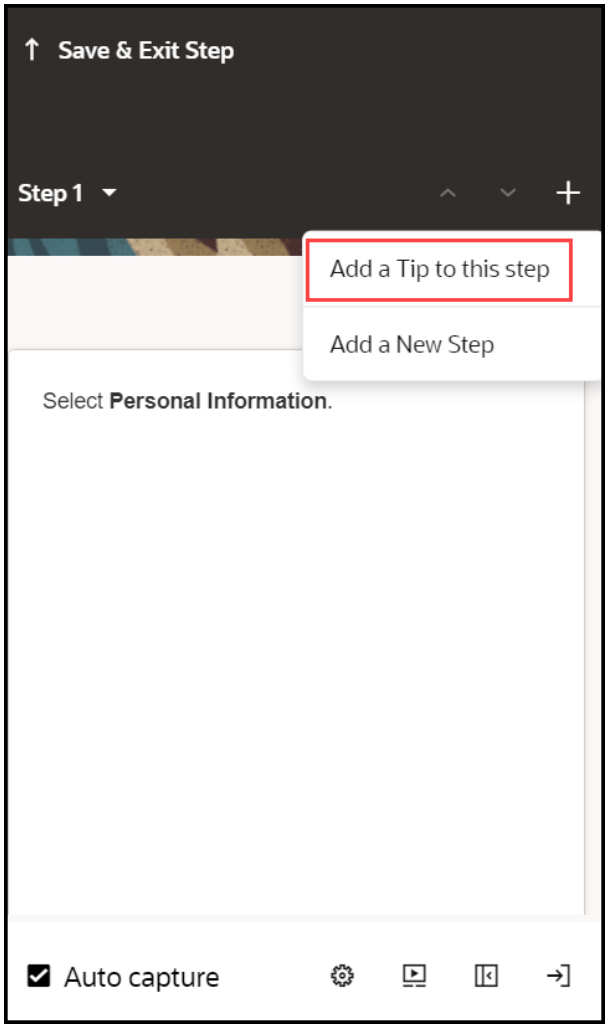

2. Choose the target element for the new tip.

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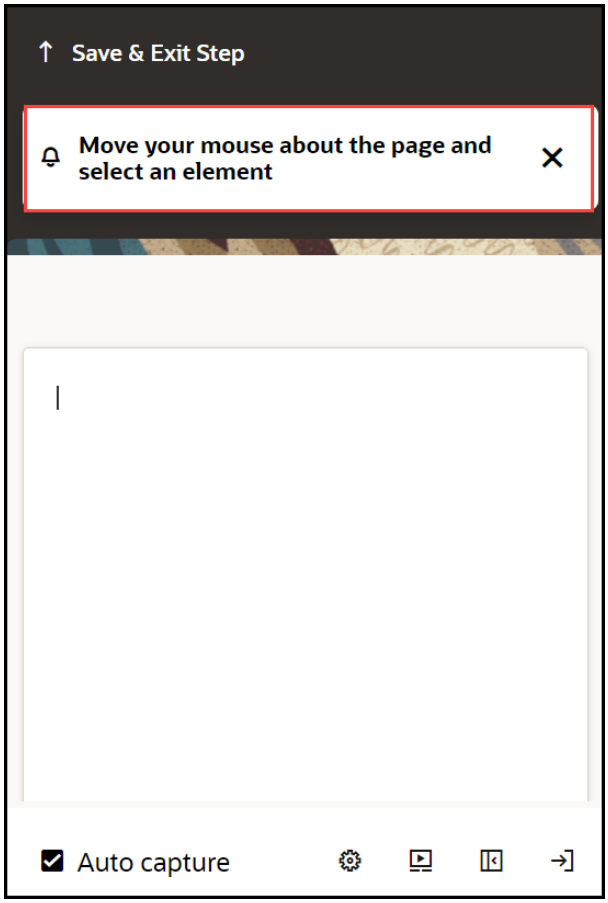

3. Configure the **Display Settings**, **Activation Settings**, and **Advanced Settings** for each tip individually.

Saving and Discarding Guides

When editing a guide in the full editor, OGL loads it to your account, preventing others from editing it. If you close your browser or your computer crashes, you will be prompted to resume editing the guide when you try to access it again. To be sure the guide remains accessible to other content developers, make sure you either save your changes or discard your changes when you are finished working with a guide.

1. To save your changes, select **Save and Close**.

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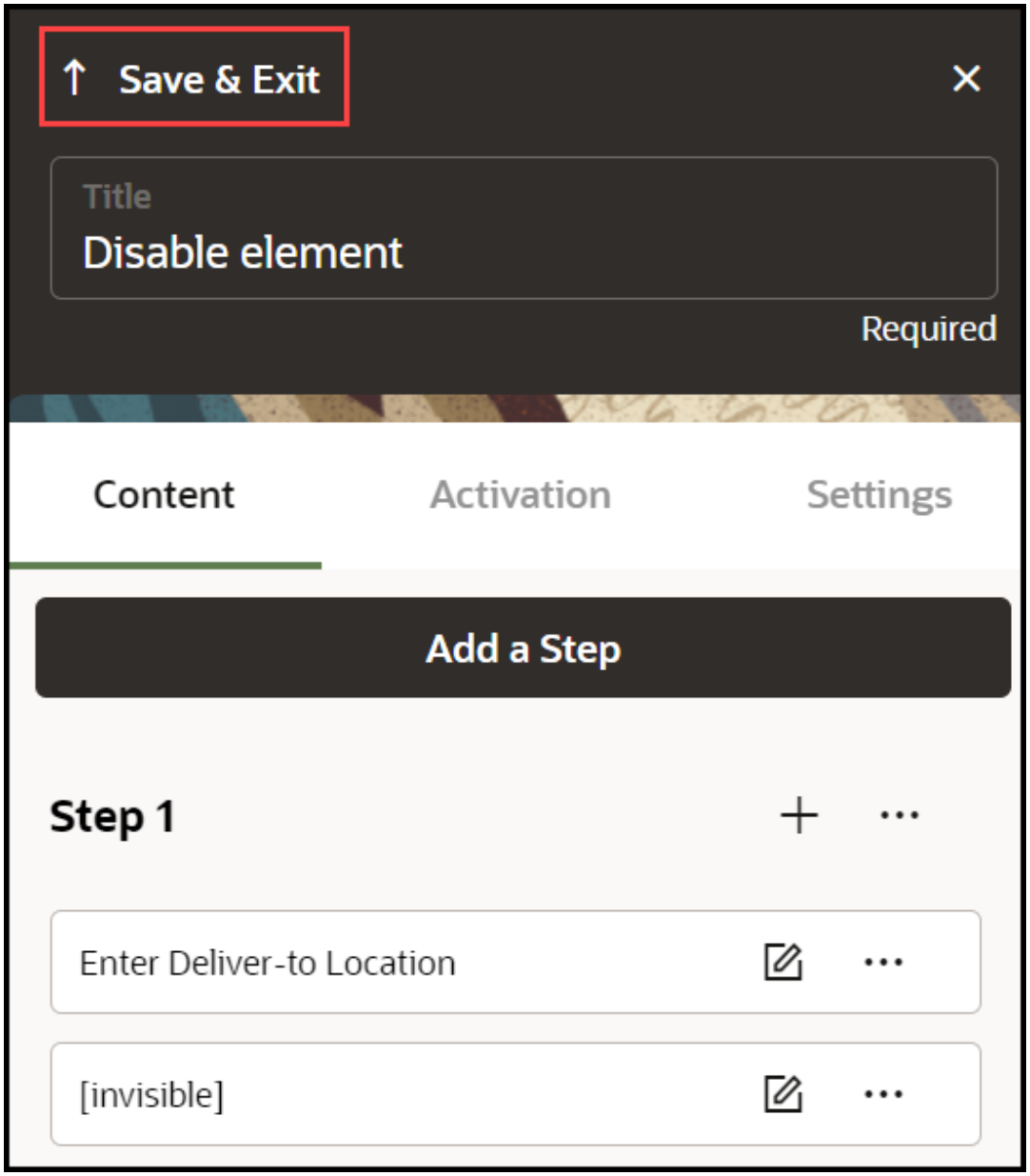

To exit without saving, select **Discard**.

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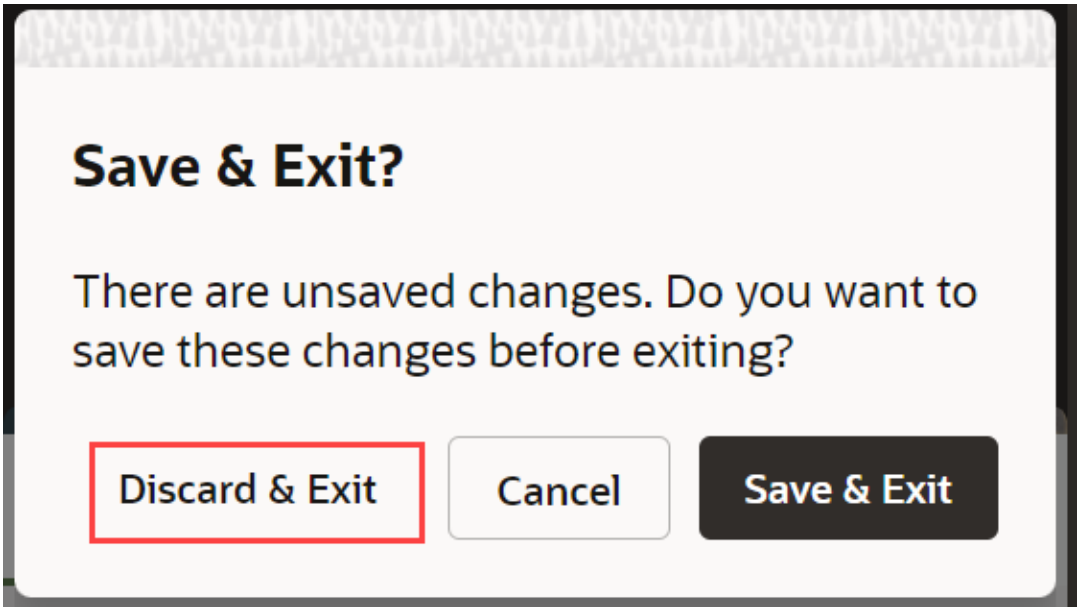

Note

When the browser is closed without saving the OGL session and you open and resume editing, the following message is displayed.

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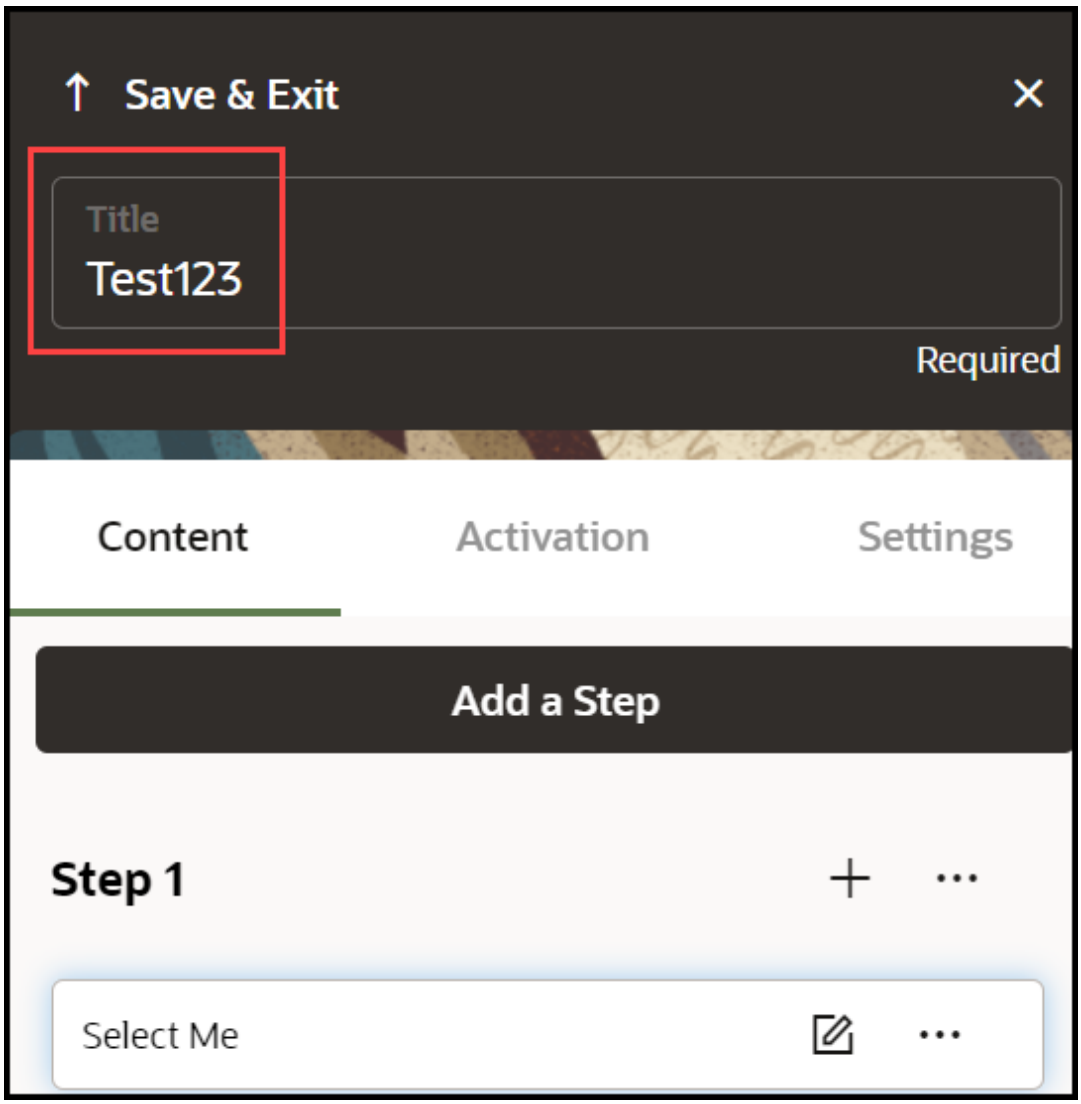
Renaming a Guide

There are two ways to change the name of a guide.

Method 1:

1. Open the guide in the full editor and edit the text of the title.
2. Select **Save & Exit**.) icon next to the name of the guide.



Method 2:

1. Go to the OGL console homepage.
2. In the left navigation panel, select **Content**.
3. On the guide that you want to rename, select the **Edit** ( ) icon next to the guide title.

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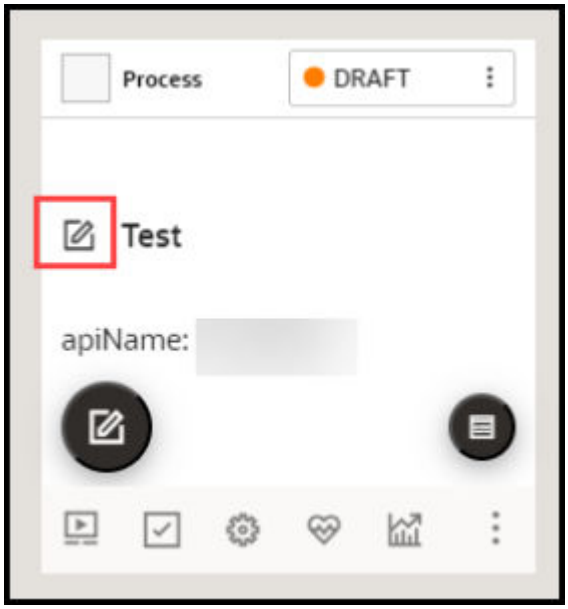
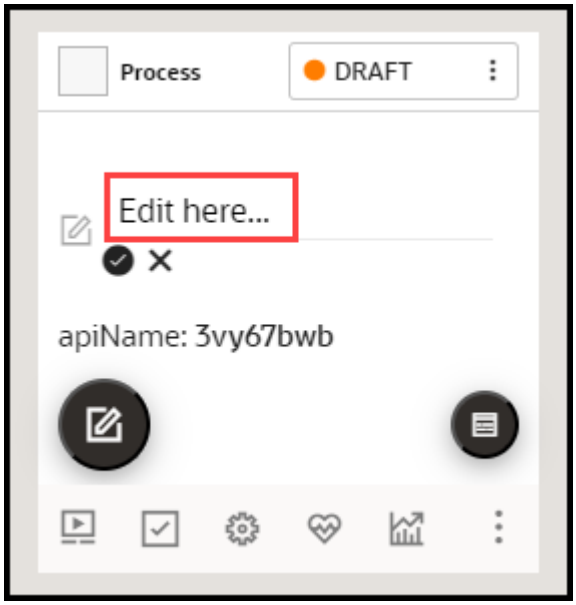


4. Edit the name field.



> **Note**
>
> The following characters are not allowed: **/ \ | : " < > ?**

5. When finished, select the **Save** ( ) icon.

   To discard changes, select the **Cancel** ( ) icon.

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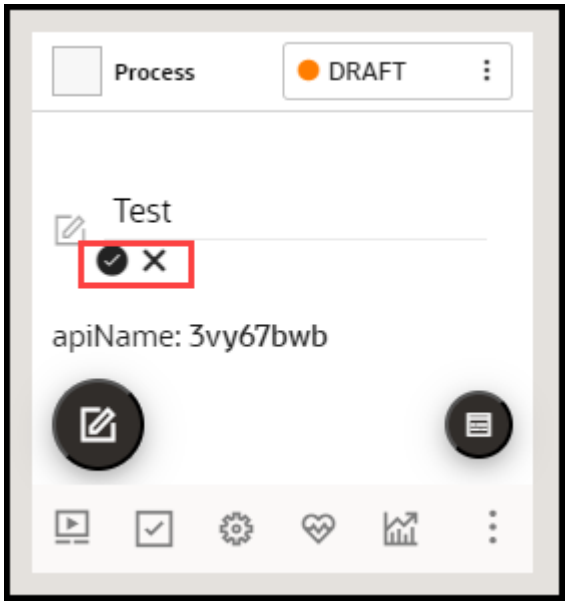

Creating Smart-Tips & Beacons

Smart-tips and beacons provide context-sensitive help on a field, button, or other UI element.

- **Visible Smart-Tips:** Used to provide context-sensitive help, on-hover of the selected text, and provide supplemental information to buttons, labels, and other screen elements. This uses a help icon (?) to draw the user's attention. This can be set as an icon with/without an animation.
- **Invisible Smart-Tips:** Anchored to an element on the page, Invisible Smart-Tips are used to provide context-sensitive help without displaying the help icon.
- **Beacon:** Adds a pulsing animation to draw the reader's attention. The best practice is to use beacons for emergency and temporary notifications.

Creating Visible & Invisible Smart-Tips

Smart-Tips appear when a user hovers over an element. Configuring Smart-Tips involves setting up the correct step-level settings and activation conditions. You can utilize Smart-Tips in the following ways:

- Create independent Smart Tips as a single-step guide
- Create a Smart Tip as part of an existing guide

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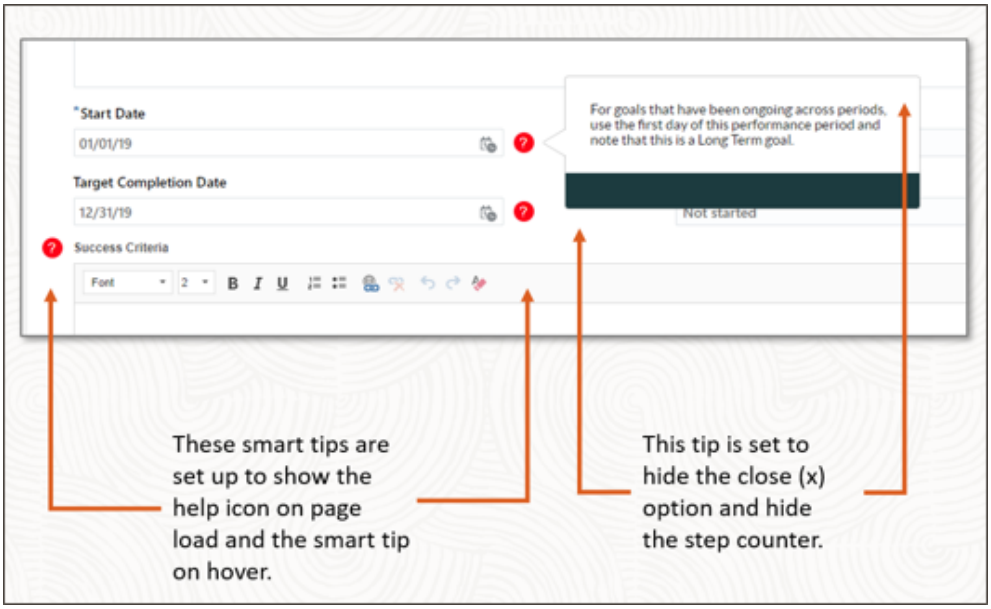
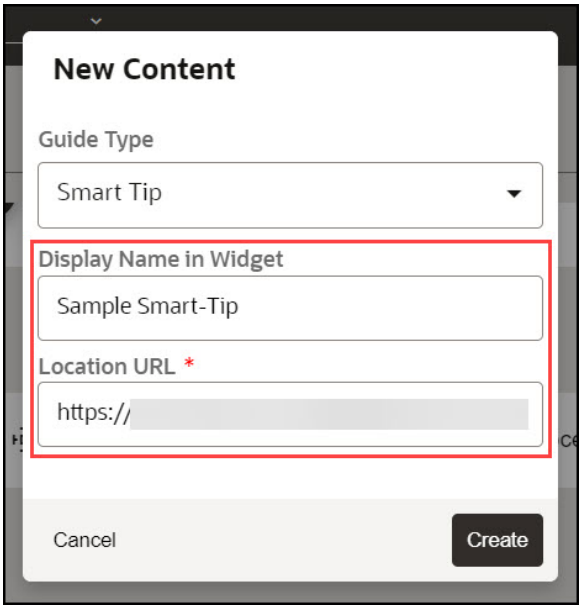


Creating Smart-Tips

1. On the OGL console homepage, select **Smart Tip** under the **Create tab**.

The **New Content** modal dialog is displayed.

2. Enter the **Display Name** and the **Location URL**.



3. Select the Create button to launch the OGL Editor.

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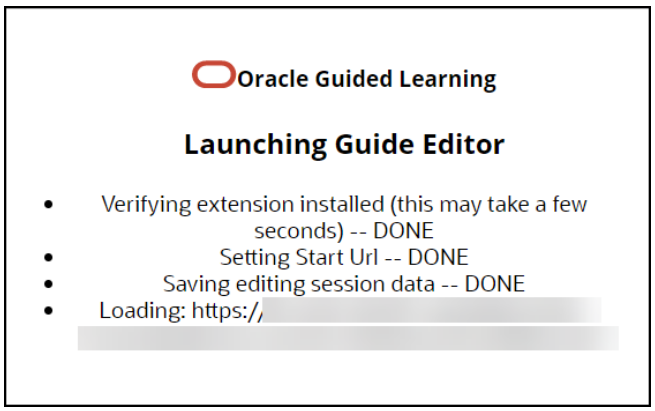
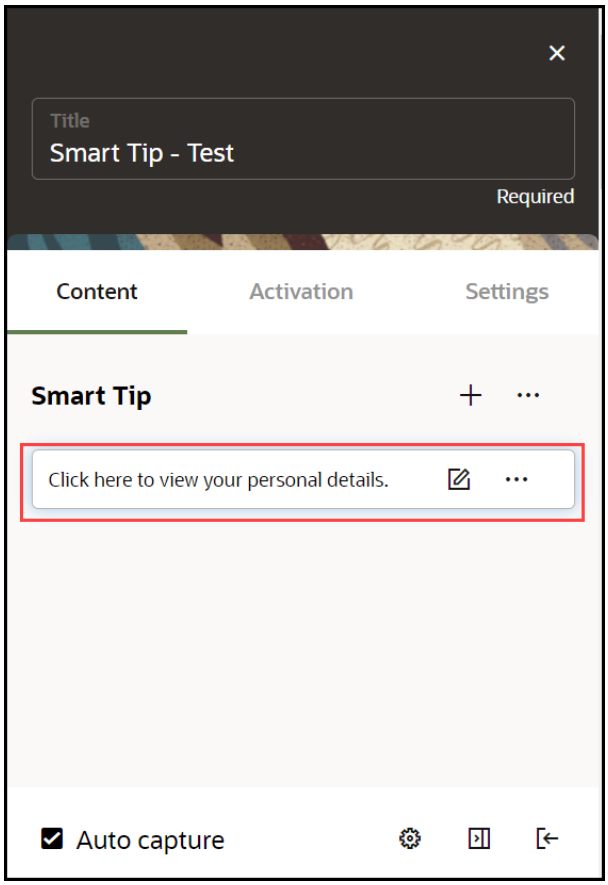


The OGL Editor launches in a new tab, where you can start capturing the steps for the guide.

> **Note**
>
> The editor appears as an overlay on your application.

4. Enter the desired text to display in your Smart-Tip.



5. Select the desired target element. (Hover over the desired element and select the Select button.)

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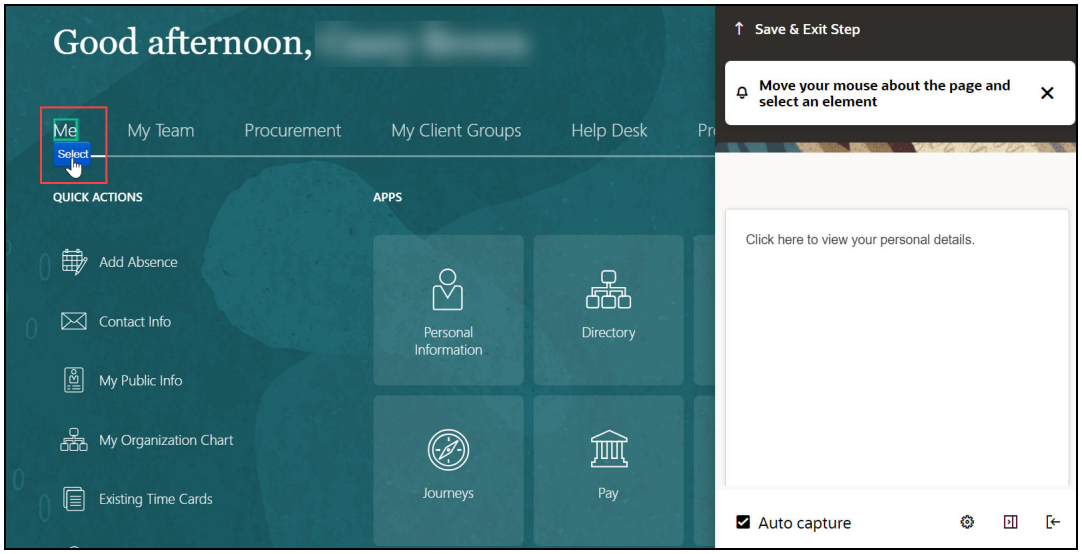
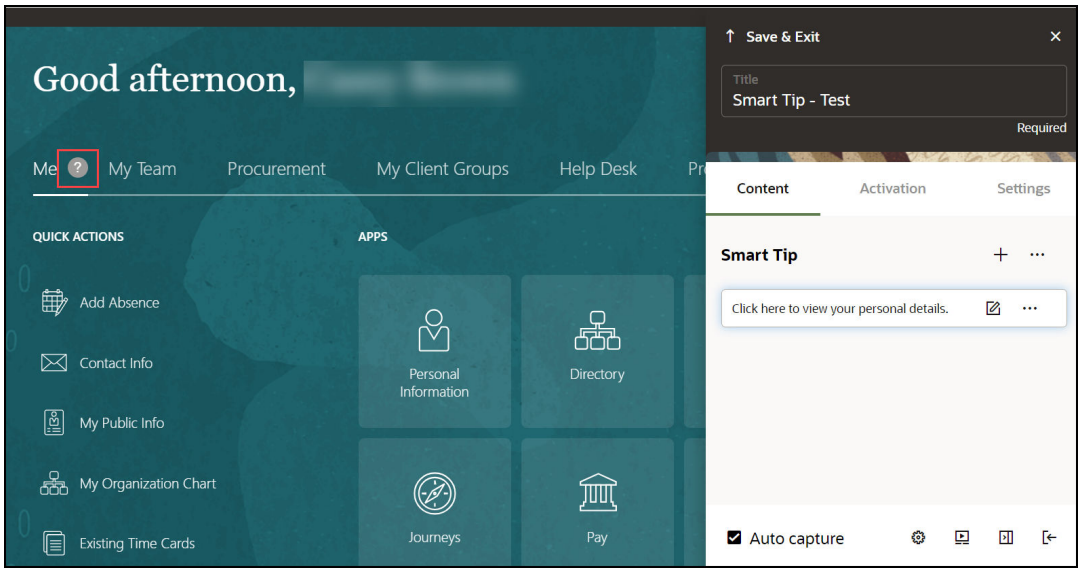


You can view the live preview of the Smart-Tip you just created.



6. Select the wrench icon ( ) to go to **Step Settings**.

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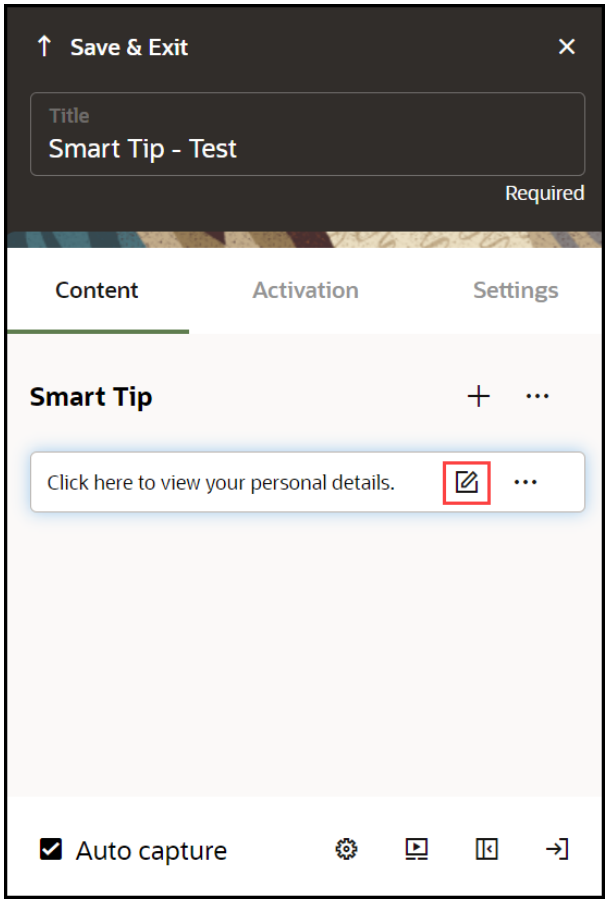

The settings window is displayed. Select on each tab to view the setting details.

7. Set the required **Display Settings**:

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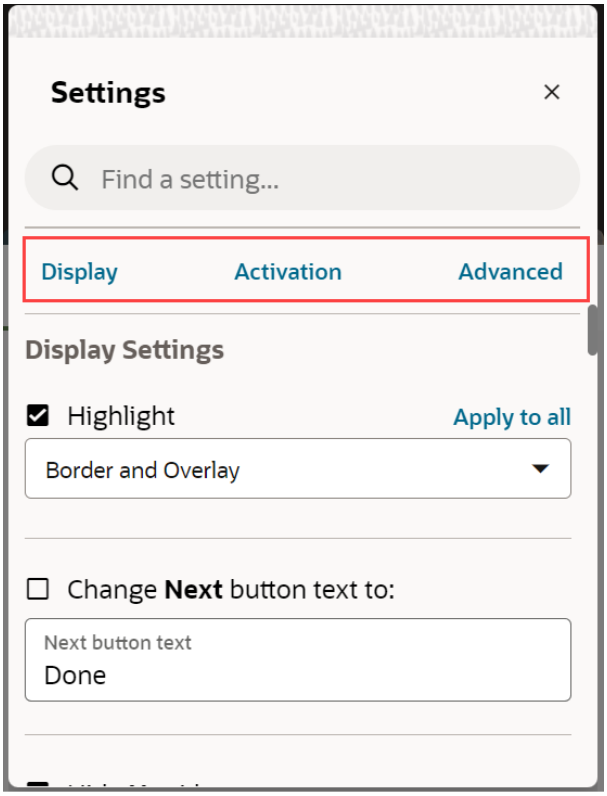

For more information, please see the Display Settings, Activation Settings and Advanced Settings pages.

8. On the OGL Console homepage, select the **Activation** icon (☑) for the Smart-Tip that you want to activate.Refer to the Enabling Guide Activation Settings section for further information on activation.

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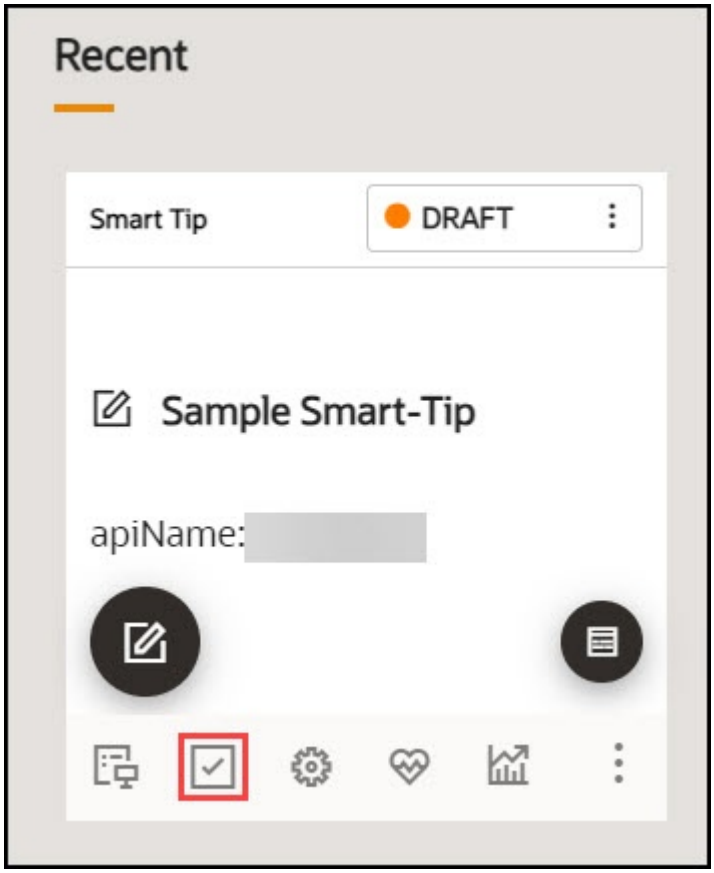

> **Note**
>
> Set the Smart-Tip to autoload when activation conditions are met.

Creating an Invisible Smart Tip

An Invisible Smart-Tip appears when a user hovers over a field, but there is no Help Icon or Beacon to indicate the Smart-Tip is there. Use Invisible Smart Tips to push information to your users at the point of interaction.

Configure an Invisible Smart-Tip just as you would a regular Smart-Tip or Beacon. However, do not choose Show Beacon or Show Help icon. Instead, leave those options blank and just configure the step to appear on hover in the Activation settings.

Creating Beacons

Beacons provide a pulsing animation to draw the reader's attention, then displays a message when the user hover over the item. The best practice is to use beacons for emergency and temporary notifications.

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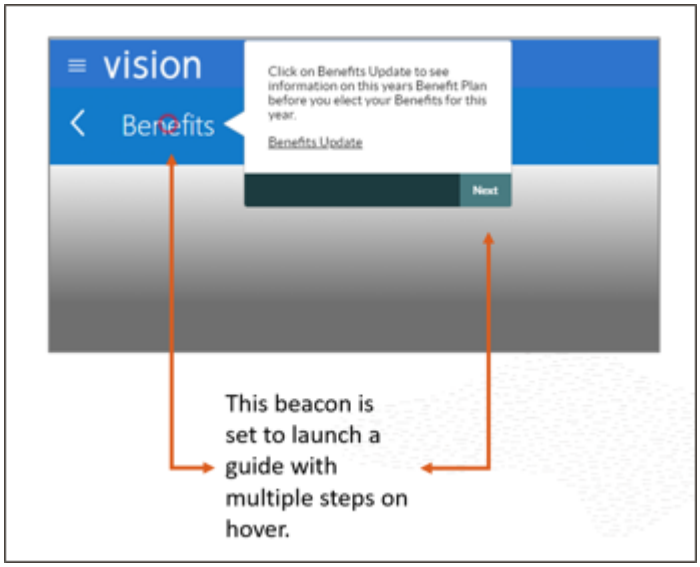
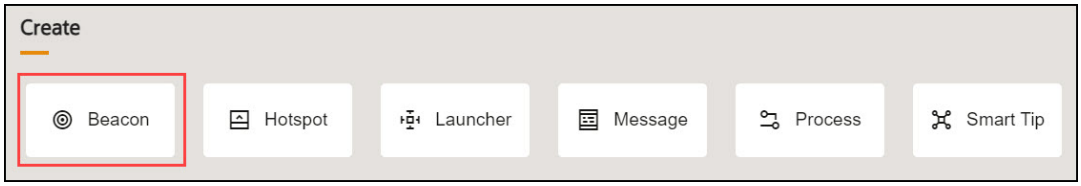


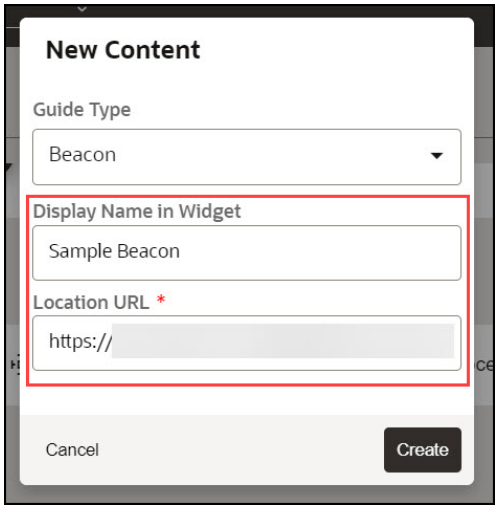
Creating a Beacon

1. On the OGL console homepage, select **Beacon** under the **Create tab**.



   The **New Content** modal dialog is displayed.

2. Enter the **Display Name** and the **Location URL**.



3. Select the Create button to launch the OGL Editor.

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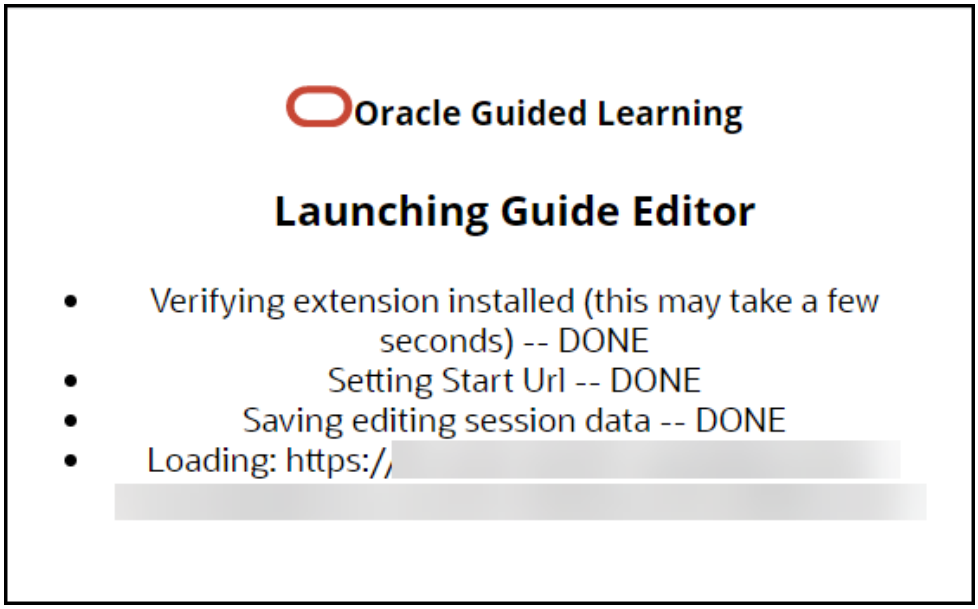

The OGL Editor launches in a new tab, where you can start capturing the steps for the guide.

> **Note**
>
> The editor appears as an overlay on your application.

4. Enter the desired text to display when the Beacon is hovered through.

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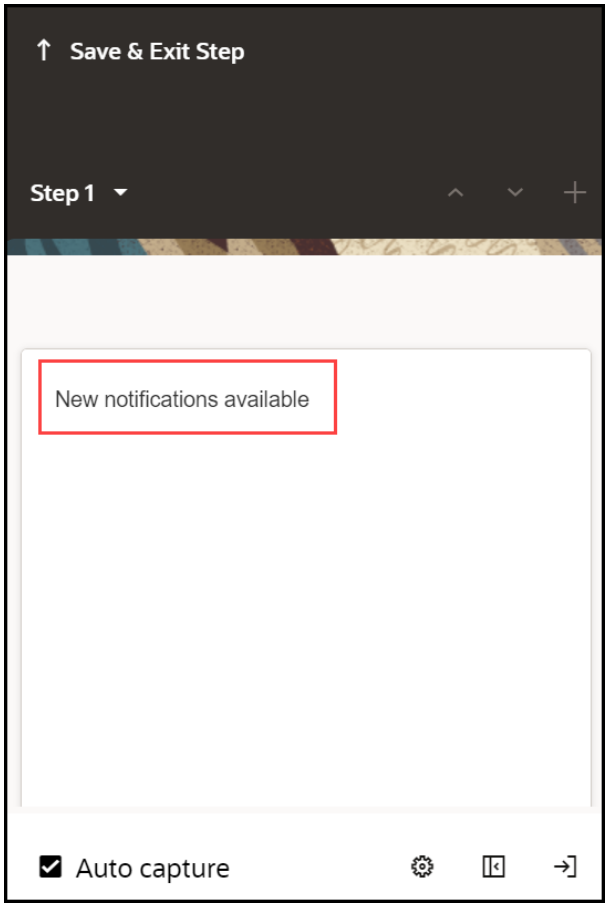
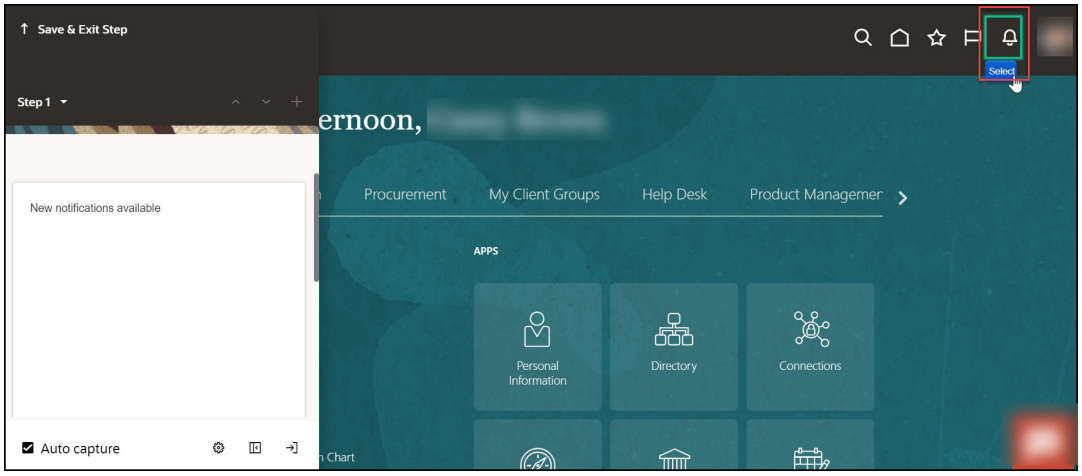


5. Select the desired target element. (Hover over the desired element and select the Select button.)



You can view the live preview of the Beacon you just created.

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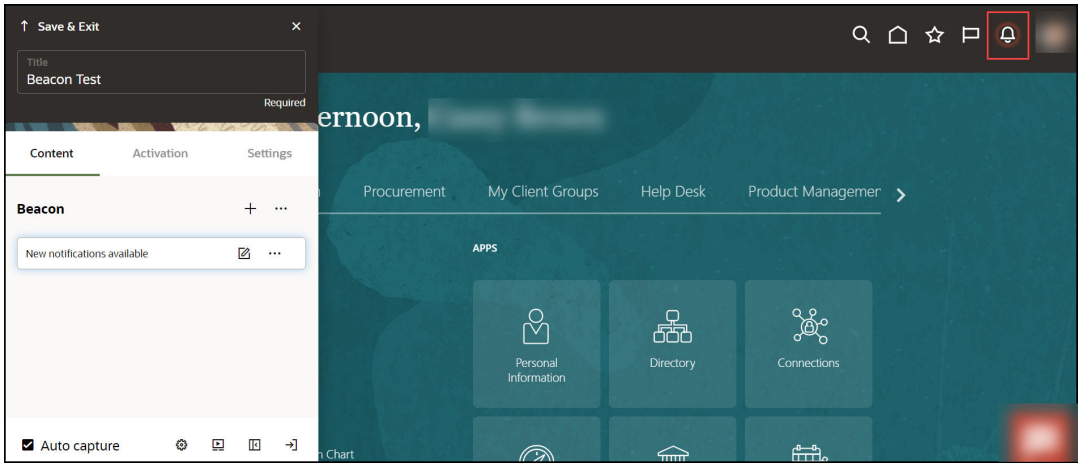
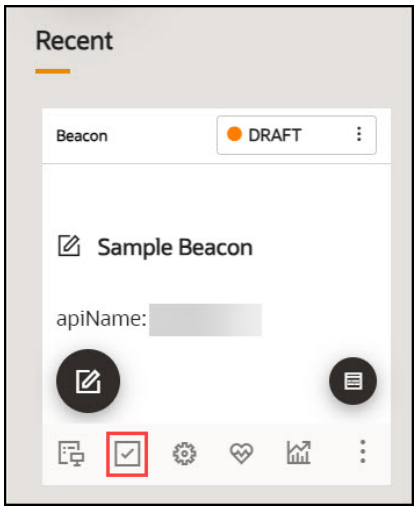


6. Select the wrench icon ( ) to go to **Step Settings**.

7. On the OGL Console homepage, select the **Activation** icon ( ) for the Beacon that you want to activate.Refer to the Enabling Guide Activation Settings section for further information on activation.



> **Note**
>
> Set the Beacon to autoload when activation conditions are met.

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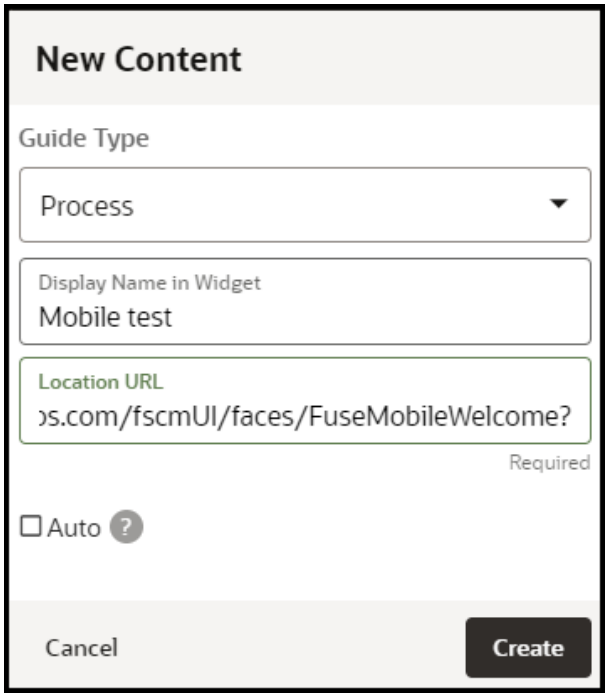
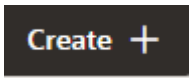
Creating Mobile Guides



1. Select the

   button on the home page of OGL Console
2. Select **Process** from the Guide Type list
3. Enter the **Mobile URL** in the Location URL field.
   Note: The Mobile URL is your instance URL (i.e. **https://ucf6-zvdr-fa-ext.oracledemos.com**) + the mobile UI string (**/fscmUI/faces/FuseMobileWelcome?**) resulting in **https://ucf6-zvdr-fa-ext.oracledemos.com/fscmUI/faces/FuseMobileWelcome?**. This is only applicable to Fusion Applications.
4. Enter the title in Display Name in the Widget field
5. Select Create Content
   Note: The OGL Editor launches in a new tab, where you can start capturing the steps for the guide.

Adding the First Step to a Mobile Guide

After you create a guide, the OGL Editor appears over the URL you entered. You are prompted to select an element or to create a Splash step:

1. To capture the screen element for your first step, move the mouse on the screen and right-click an element to select it, or click Select

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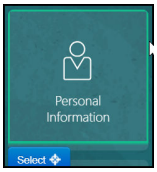

2. Enter the text in the Content Editor field.
   Note: As a best practice, it is recommended that:
   - You consider the amount of text entered into the tip to ensure proper readability on mobile devices and to prevent impeding the functionality of tip buttons.
   - You test the guide from end-to-end on various mobile devices prior to publishing the guide.
   - The content types that are supported on mobile devices are as follows: Process Guides, Smart Tips, Beacons, Surveys, Links, Messages, Task Lists and Launchers.
3. Open the Step Settings

4. Set the **Display Settings**

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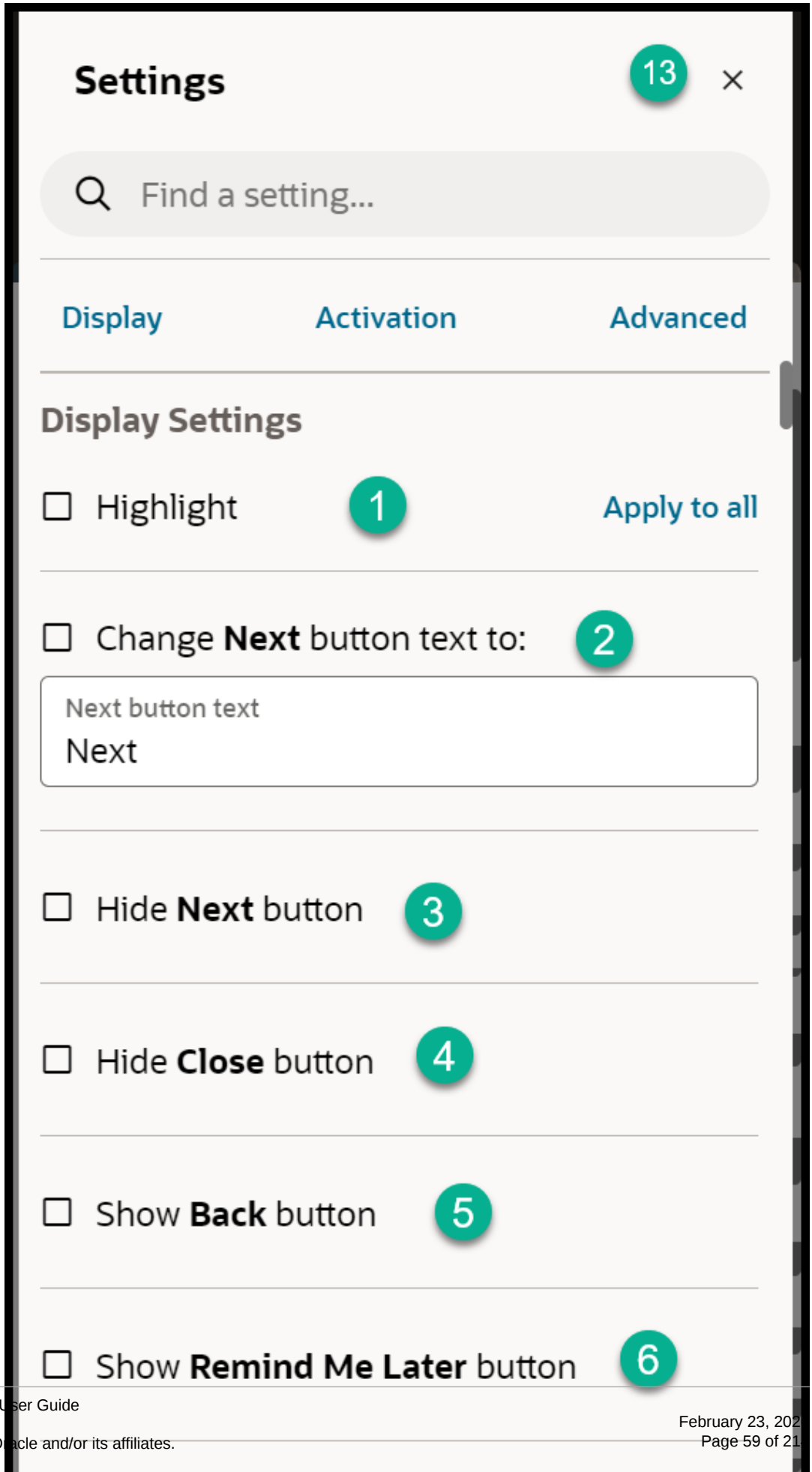

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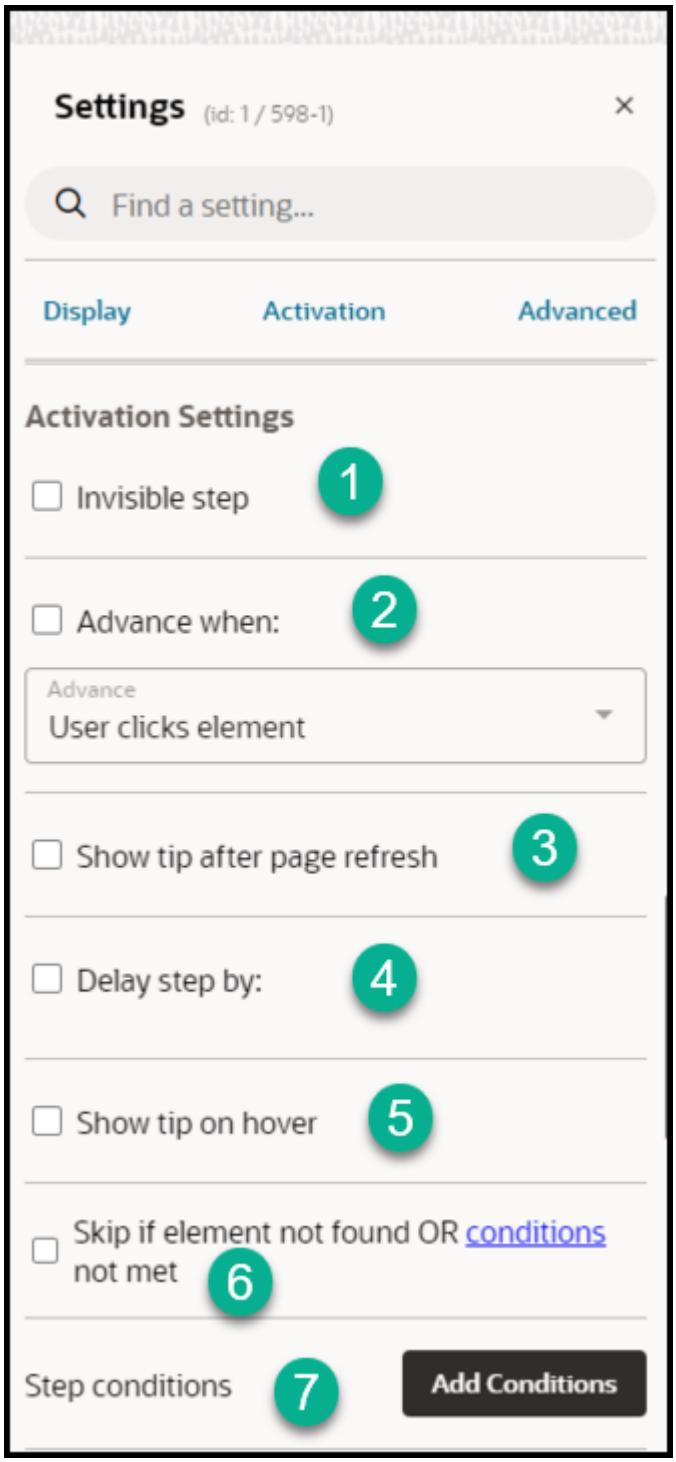
Note:

- By default, the tip placement is set at the bottom regardless of what is selected in the Display Settings.
- The Tip Width is always fixed for Mobile Guides.

5. Set the **Activation Settings**



Note:

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- You can set the **Advance When** option to advance on-click of a button. The tip is displayed at the bottom of the page and advances on-click of the selected button.
- For steps with a Next button, you can select any element on the page, the tip will be displayed at the bottom of the page and advance on-click of the Next button.

6. Set the **Advanced Settings**

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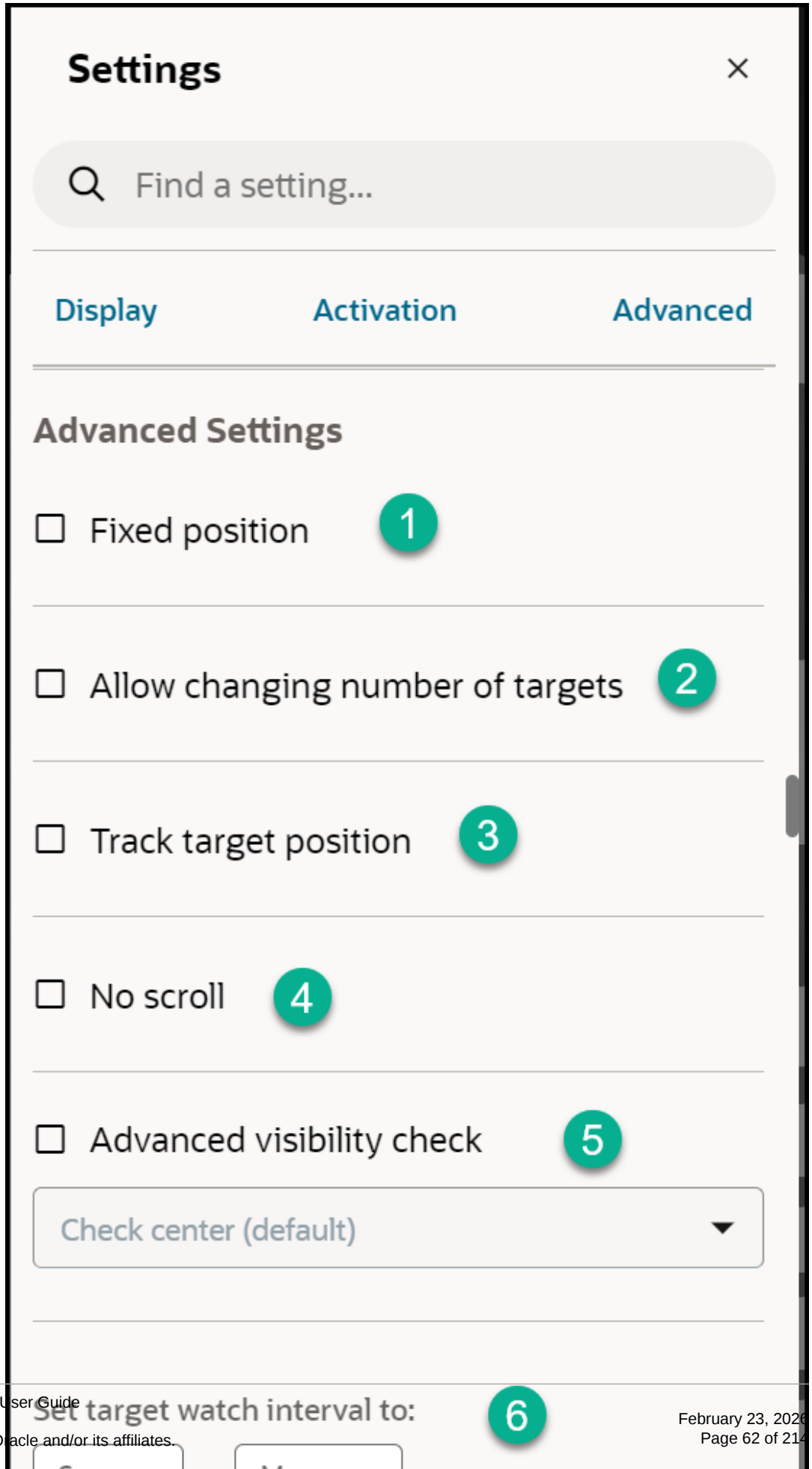

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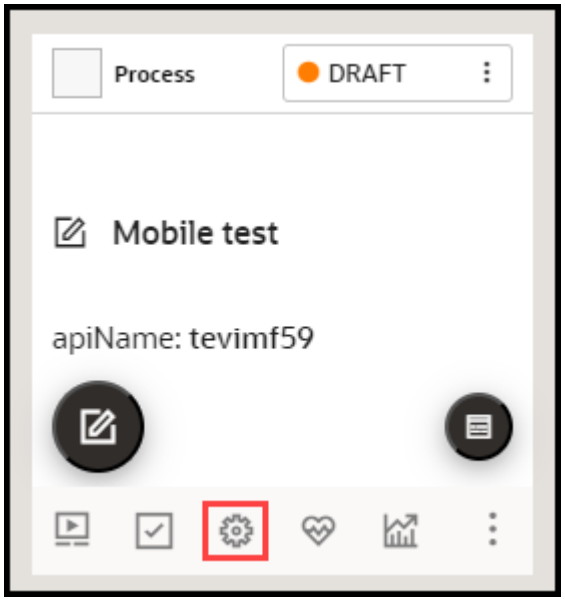
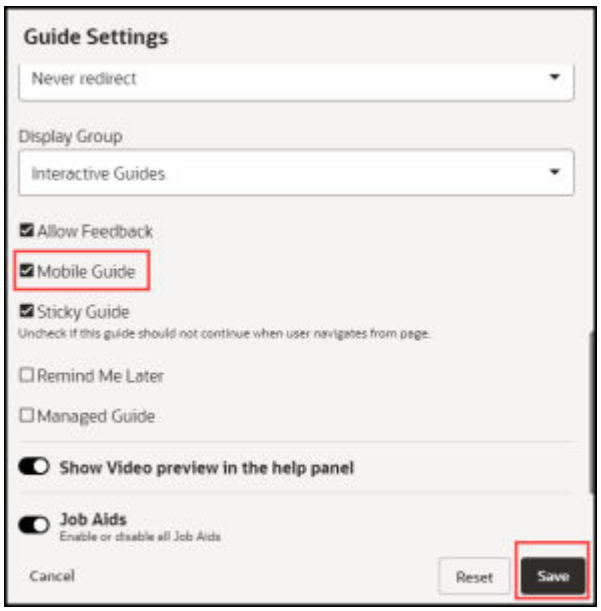
7. Repeat steps 1 to 6 for the subsequent steps.
Note: After creating the first step and moving from the HomePage the mobile UI string in the URL might change from (**/fscmUI/faces/FuseMobileWelcome?**) to (**/fscmUI/faces/FuseOverview?**). Please replace **Fuse** with **FndMobile** so it becomes (**/fscmUI/faces/FndMobileOverview?**)
8. After adding all of the guide steps, click **Save and Close**.
Note: The editing tab will close. Please go back to the OGL console tab.

Defining the Settings

1. Select Settings



2. Ensure the **Mobile Guide** checkbox is checked and the **Sticky Guide** box is unchecked



3. Select Save Settings

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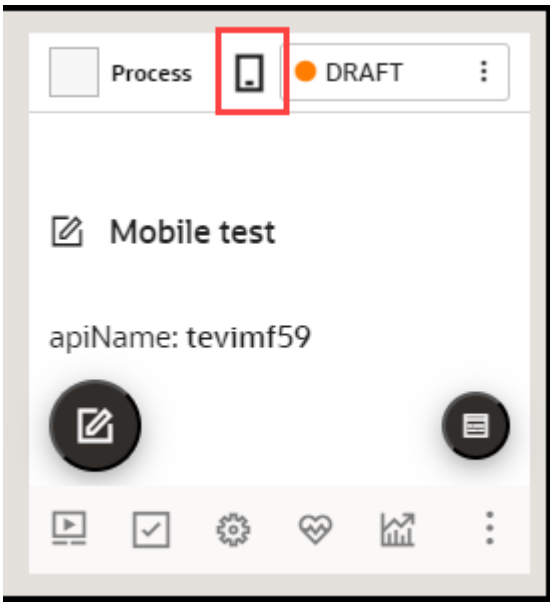
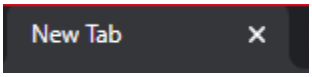
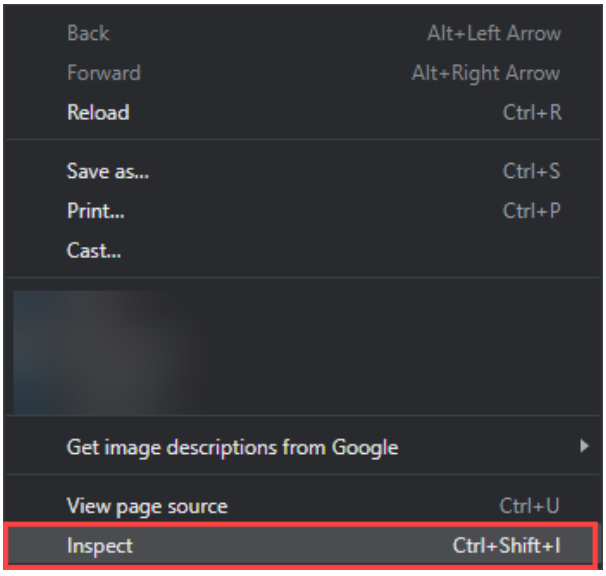
Note: After saving the settings, a mobile device icon will display to identify mobile guides/smart tips.



Testing the Mobile Guide

IMPORTANT: It is recommended that you test the guides on a mobile device for optimum results. **Note**: steps 1 to 3 below are relevant only when not testing on a mobile device.

Step	Example
1. Open a new tab	
2. Open Developer Tools (Right-click > Select Inspect/ Inspect element)	

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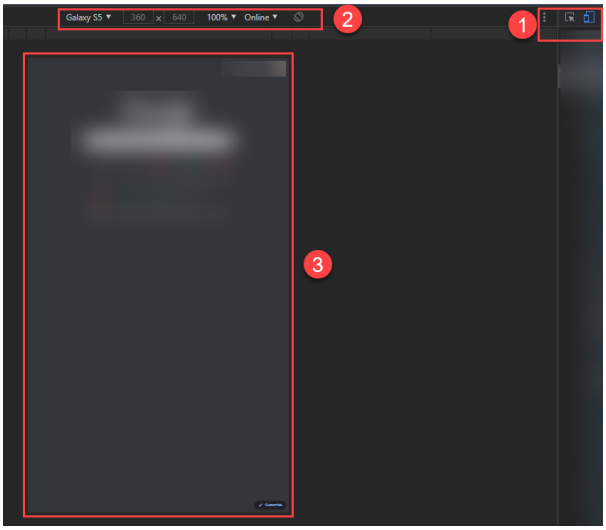
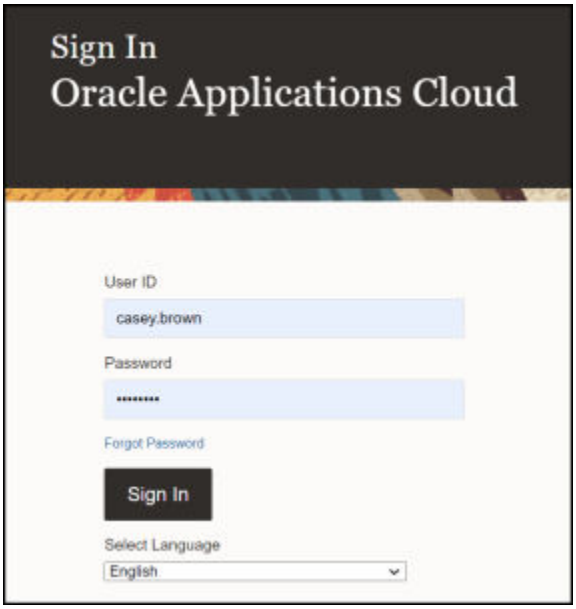
Step	Example
3. Go to Toggle Device Toolbar (**Ctrl**+**Shft**+**M**) 1 = Toggle Device Toolbar indicator 2 = Device selector 3 = Page	
4. Log in to the application	

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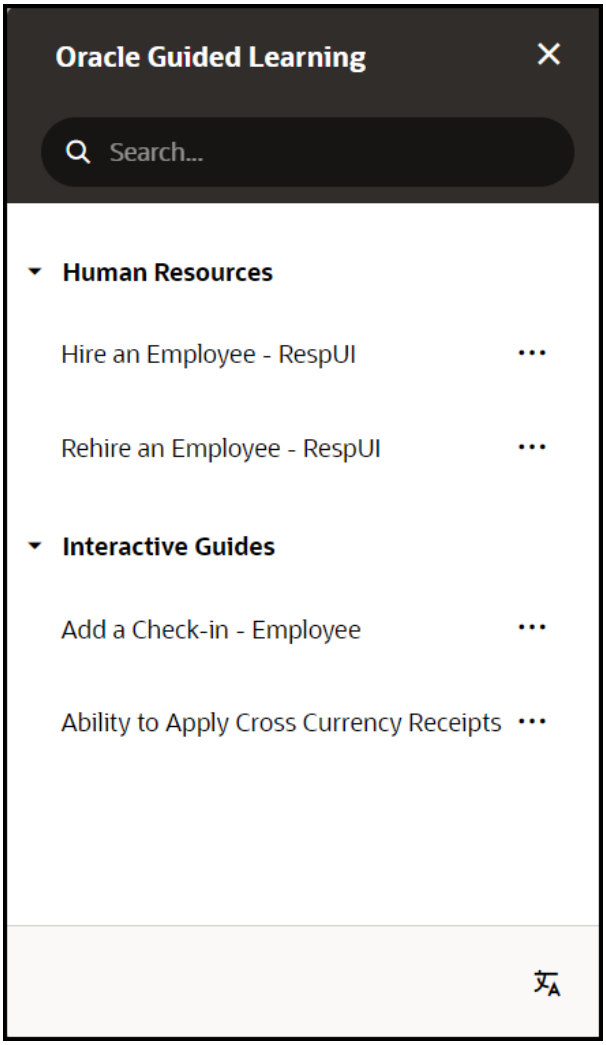
Step	Example
5. Open the OGL widget	

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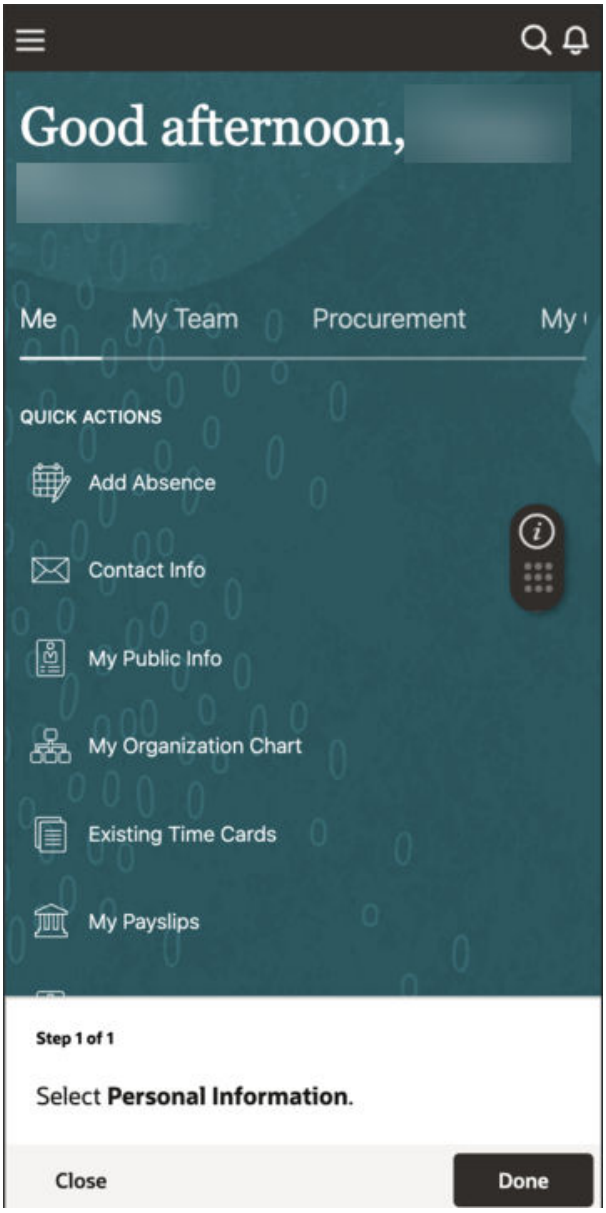
Step	Example
6. Run the guide **Note**: The instructions will display at the bottom of the screen and advance on-click of the instructed button/link or the Next button. Use the Close(**X**) button to exit the guide.	

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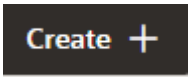
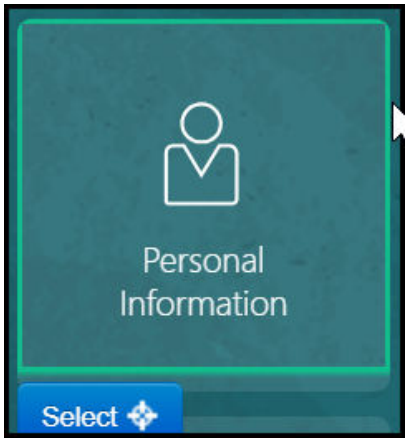
Creating Mobile Smart Tips

1. Select the 

button on the OGL Console
2. Select **Smart Tip** from the Guide Type list
3. Enter the **Mobile URL** in the Location URL field*(see Creating a Mobile Guide)*.
   Enter the title in Display Name in the Widget field
4. Select Create Content
   Note: The OGL Editor launches in a new tab, where you can start capturing the steps for the guide.

Adding the first Smart tip for your Mobile Smart Tip Collection

After you select Create Content, the OGL Editor appears over the URL you entered. You are prompted to select an element:

1. To capture the screen element for your first smart tip, move the mouse on the screen and right-click an element to select it, or click Select 

2. Enter the text in the Content Editor field.
   Note: Limited to 50 characters.

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3. Open the Step Settings

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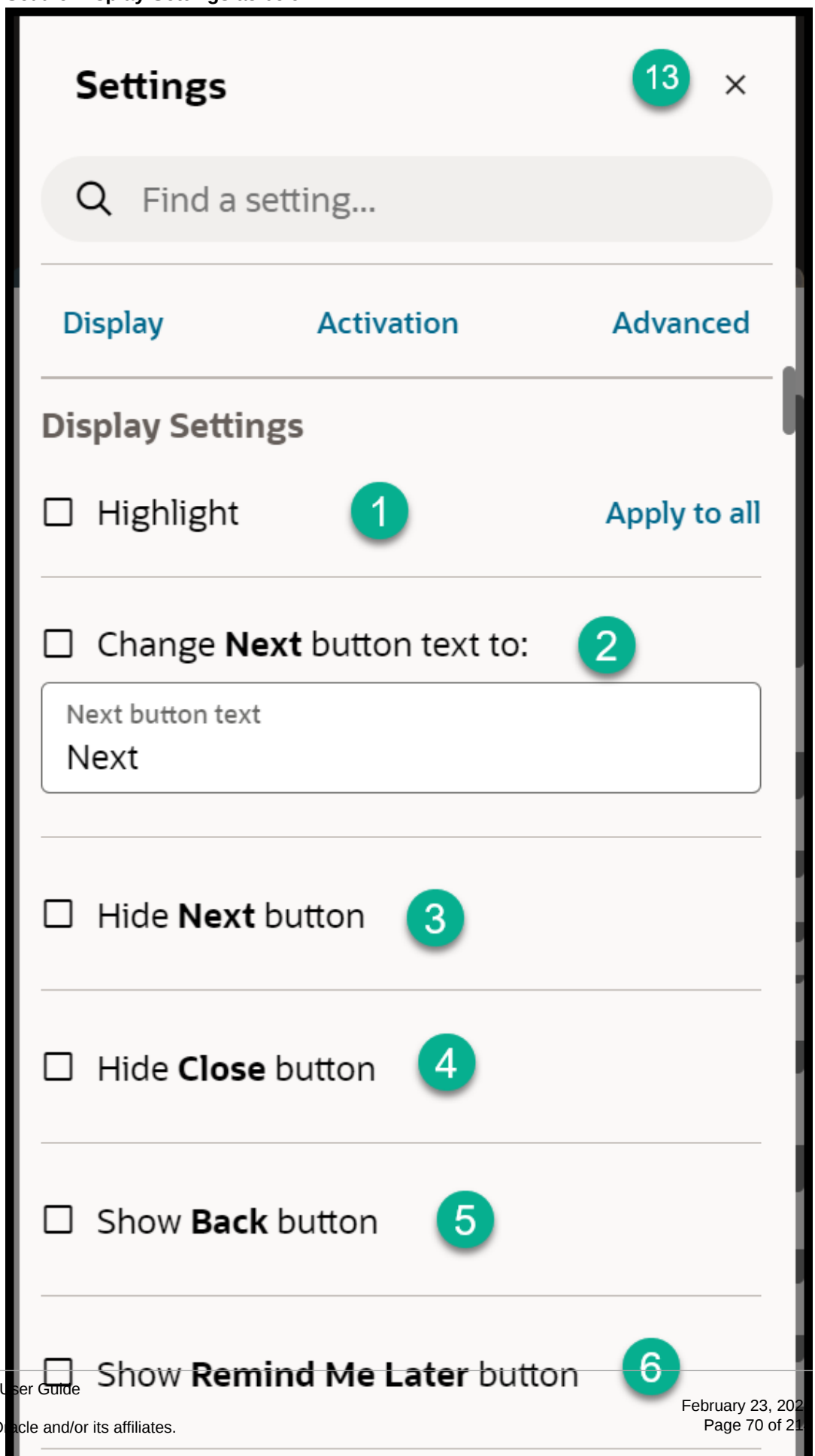
4. Set the **Display Settings** as below



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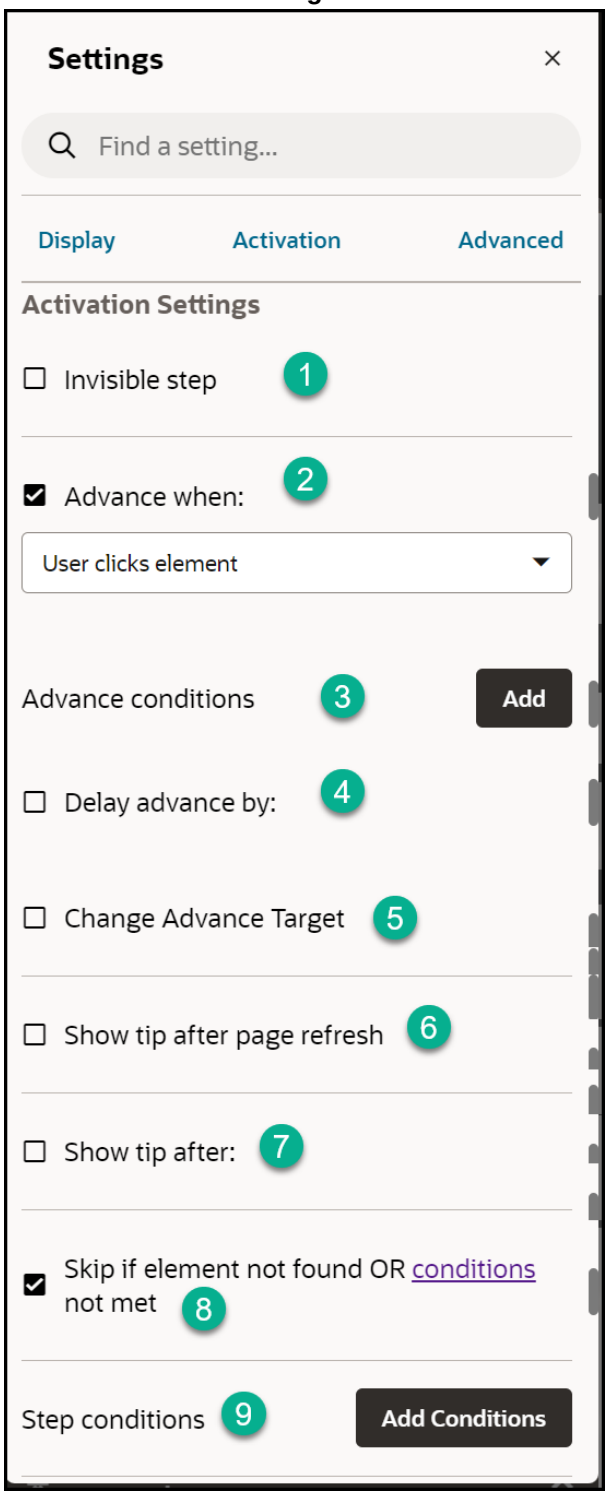
Note:

- By default, the tip placement is set at the bottom regardless of what is selected in the Display Settings
- The Tip Width is always fixed for Mobile Smart Tips

5. Set the **Activation Settings** as shown below



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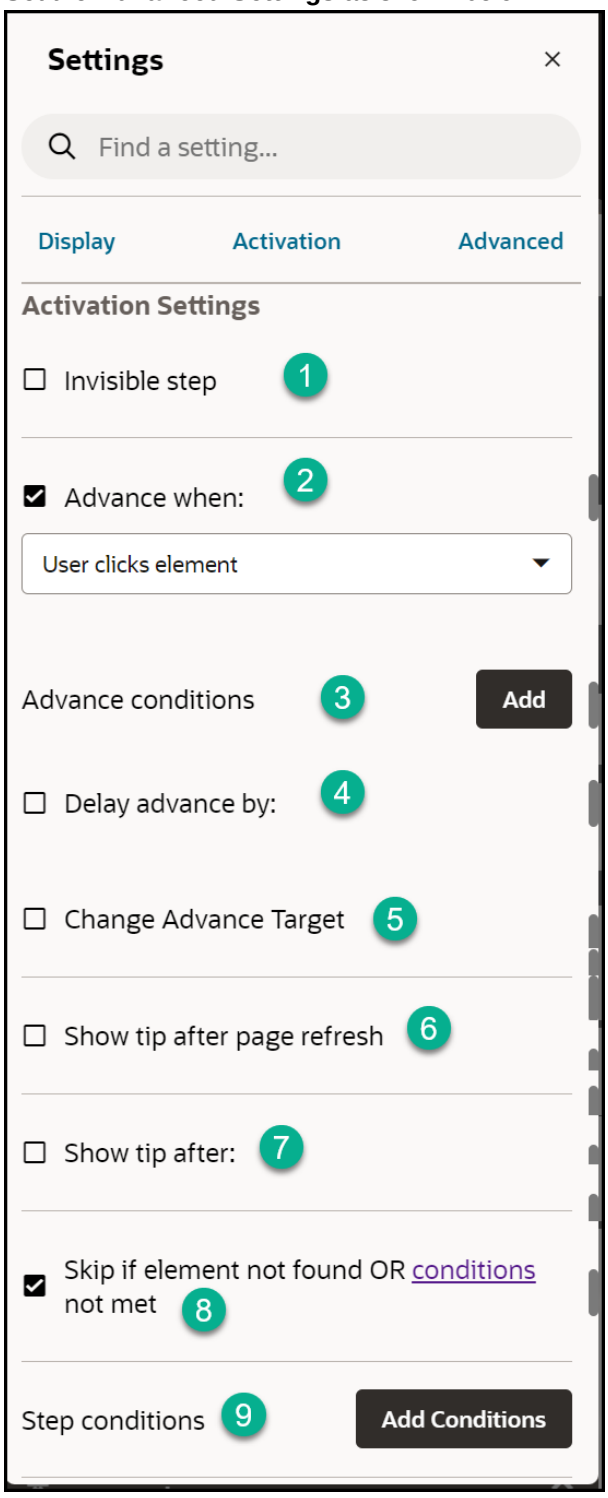
6. Set the **Advanced Settings** as shown below



7. Repeat steps 1 to 6 for the subsequent steps, then select Save& Exit.
IMPORTANT: Refer to ***Defining the Mobile Guide /Smart Tip Settings***

Testing the Mobile Smart Tips

IMPORTANT: It is recommended that you test the smart tips on a mobile device for optimum results. Note steps 1 to 3 below are relevant only when not testing on a mobile device.

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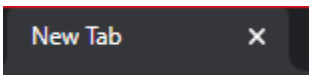
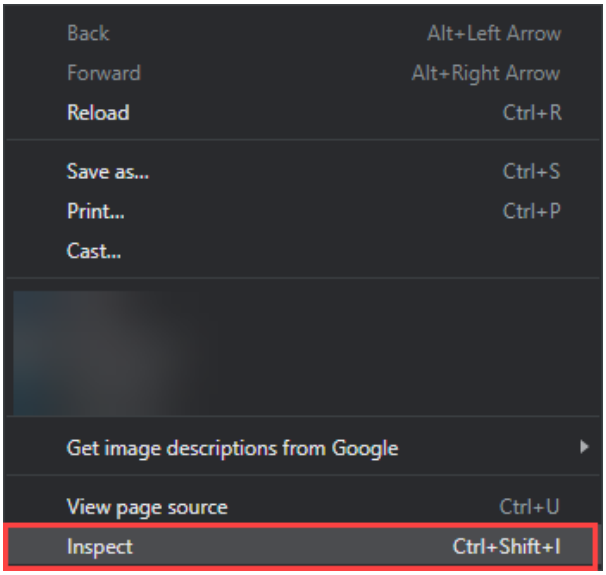
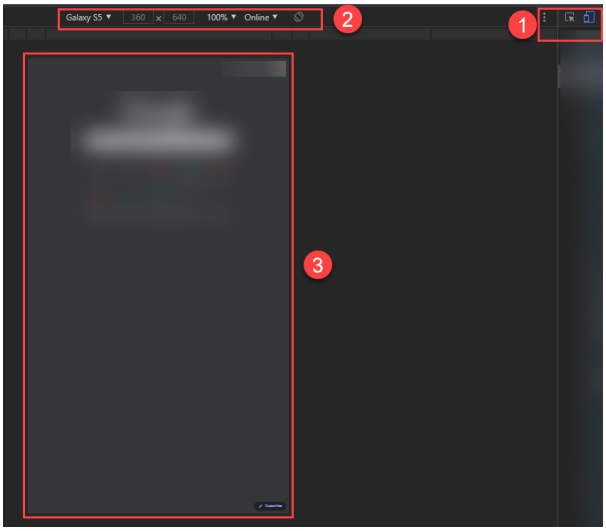
Step	Example
1. Open a new tab	
2. Open Developer Tools (Right-click > Select Inspect/ Inspect element)	
3. Go to Toggle Device Toolbar (**Ctrl**+**Shft**+**M**) 1 = Toggle Device Toolbar indicator 2 = Device selector 3 = Page	

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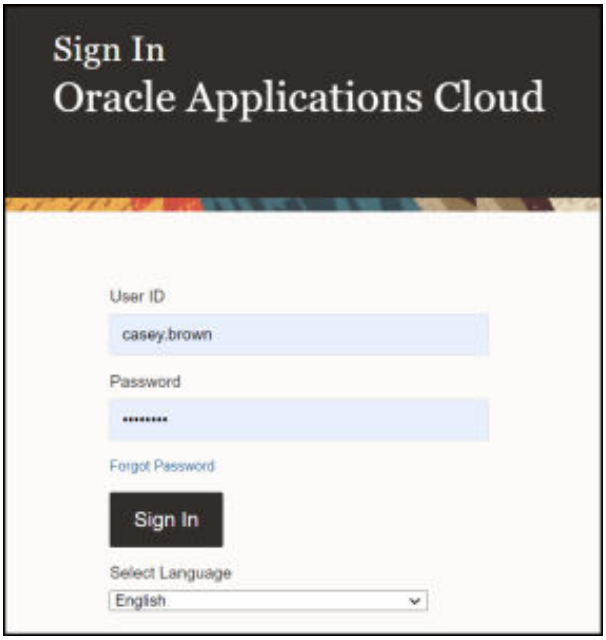
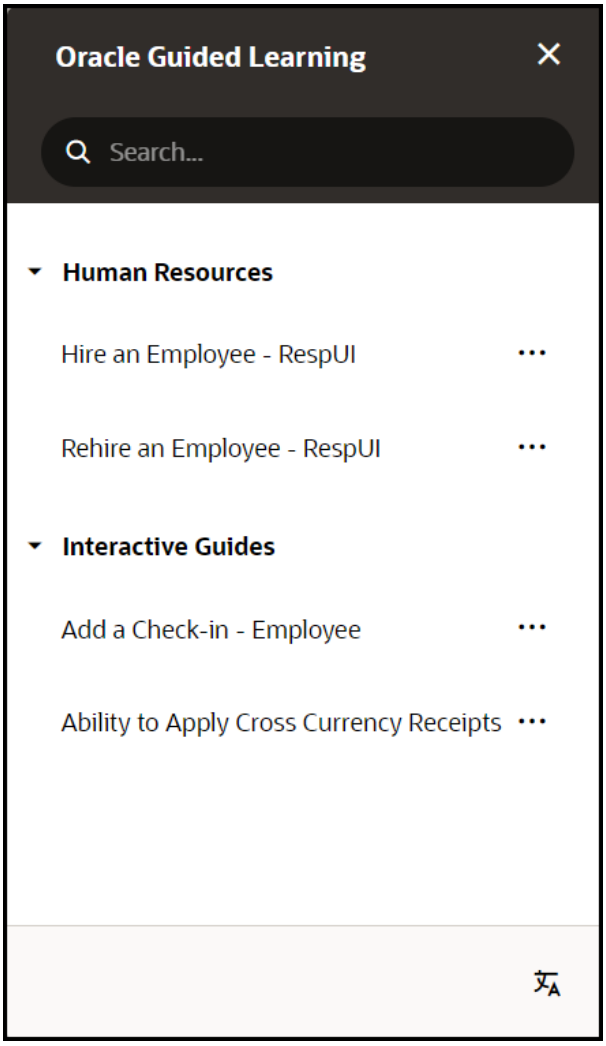
Step	Example
4. Log in to the application	
5. Navigate to the page where the Smart tip is intended to display. i.e. About Me > Goals and Performance > Goals	

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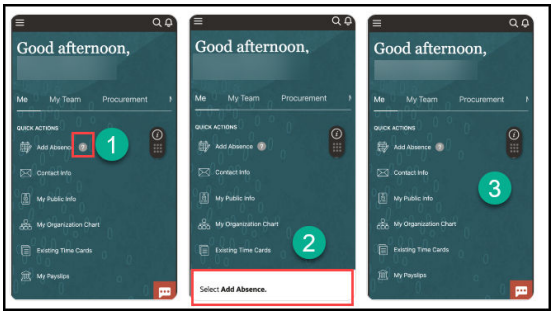
Step	Example
6. Tap on the Smart tip icon (1) to display the information **Note**: The information will display at the bottom of the screen (2) and tapping any area outside the tip (3) will close the tooltip.	

Enabling Guide Activation Settings

Introduction

Conditions allow you to determine where and/or when an OGL item is available/shown to the user in the application. These are called guide activation conditionsand are managed at the guide level. There also exist **step conditions**, these are set at the step/tooltip level within a guide.

This article focuses on guide activation conditions.

How to access the Guide Activation Settings Interface

From the OGL Console, select the check icon (☑) for the guide that you want to access.

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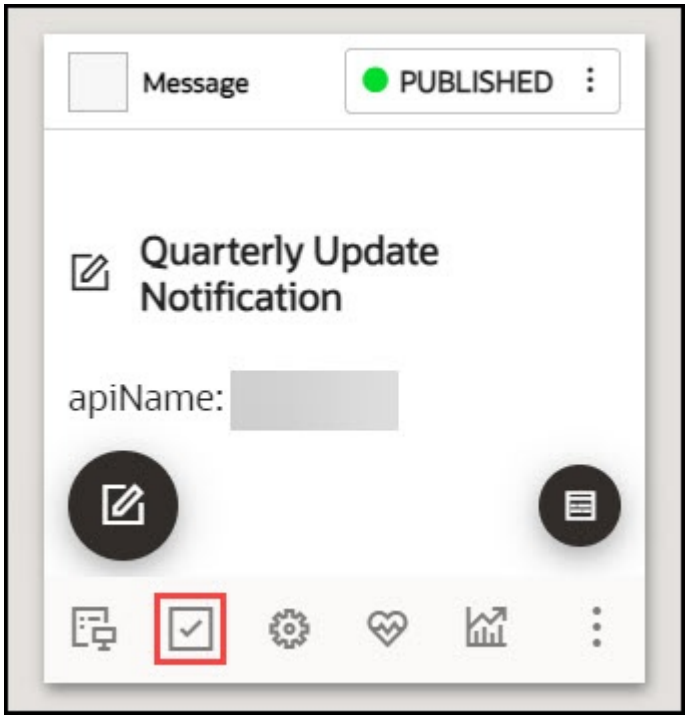
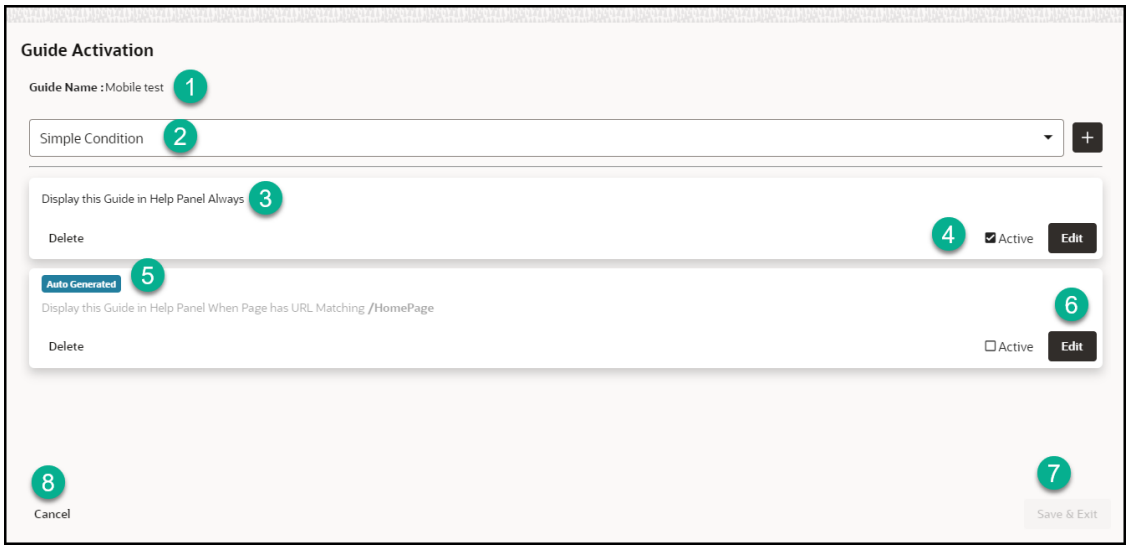


The below-pictured interface will be presented:



1 = Guide Name: This shows the name of the guide

2 = This dropdown is used to add new simple, advanced, and time conditions.

3 = A summary of the guide conditions

4 = The status of the is displayed. Active means the condition is set and active. Inactive means the condition is set but not active

5 = Auto-Generated tag, this identifies conditions that have been automatically generated.

6 = Edit condition button. Select the dropdown options and edit the condition accordingly.

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7= Cancel the changes and exit.

8 = Save the changes and exit.

> **Note**
>
> Guide Activation conditions are evaluated using the **AND** Boolean operator. A guide will display/autoload if all the active conditions (**C***1*, **C***2*,...**C***n*) are evaluated to TRUE. In the example above, the guide will be available in the widget only if all three conditions (Simple, Advanced, Time) are evaluated to TRUE. The OR operator (denoted by the pipe character "|") is only possible within an advanced condition *(see advanced conditions)*.

Guide Activation Options

> **Important**
>
> These options are set at the guide level.

When adding a new condition, there are three main settings:

- **Enabled** checkbox: Determines if the condition is active or inactive. If this is not checked, the condition will not be evaluated
- **Help Panel** checkbox: Determines if the guide will be available from the OGL Help Widget
- **Autoload** checkbox: Determines if the guide should start automatically if the condition is met

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There are three types of conditions, these are:

- **Simple conditions**
- **Advanced conditions**
- **Time conditions**

Simple conditions offer a simplified process of setting activation conditions by leveraging predefined pages and user roles.

To set a new condition, select the **Simple Condition** button.

The below interface will be displayed.

To set a new condition, click on the **simple condition** button, this will bring up the following interface:

There are five basic combinations in simple conditions, these are summarised in the table below:

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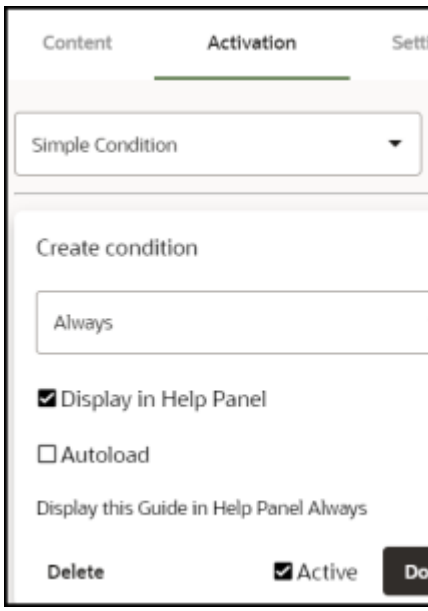
Display When	Description
Always	 Displays the guide in the widget, all the time. **Note**: We recommended NOT to use the Autoload option with this type of condition.

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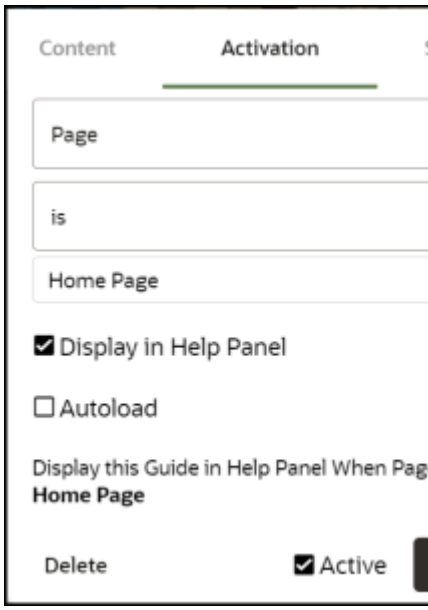
Display When	Description
***Page* IS**	 Displays the guide in the widget **only when the user is** on the Homepage **Note**: If the Autoload option is used, the recommendation is to add additional conditions to limit the number of times the guides will autoload *(see advanced conditions)*.

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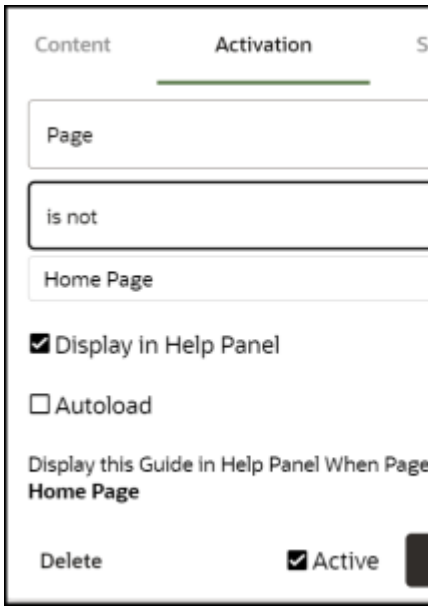
Display When	Description
***Page* IS NOT**	 Displays the guide in the widget **only when the user is not** on the Homepage **Note**: We recommended NOT to use the Autoload option with this type of condition.

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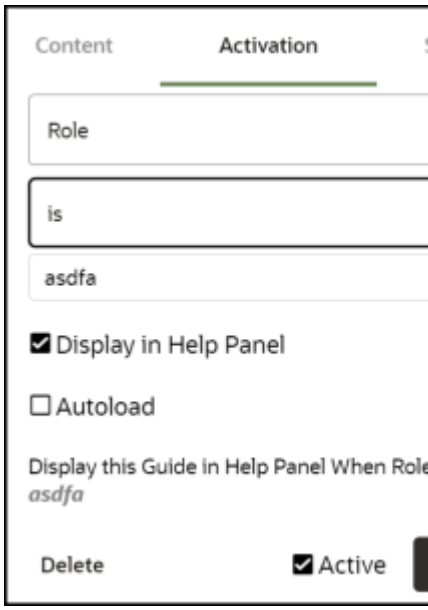
Display When	Description
***Role* IS**	 Displays the guide in the widget **only when the user role is** = Payables Specialist **Note**: Simple conditions (**AND conditions**) allow you to associate only one user group (i.e. Payables Specialists) to the guide. If you add multiple simple conditions to the same guide(i.e. a condition for Payables Specialists and another for Receivables Specialists), then all conditions will have to be met for the guide to be displayed in the widget or autoloaded (that is, a user will have to be both a Payables Specialist and a Receivables Specialist). Conditions (**OR conditions**) that allow the user to be either a Receivables Specialist or Payables Specialist are covered in advanced conditions.

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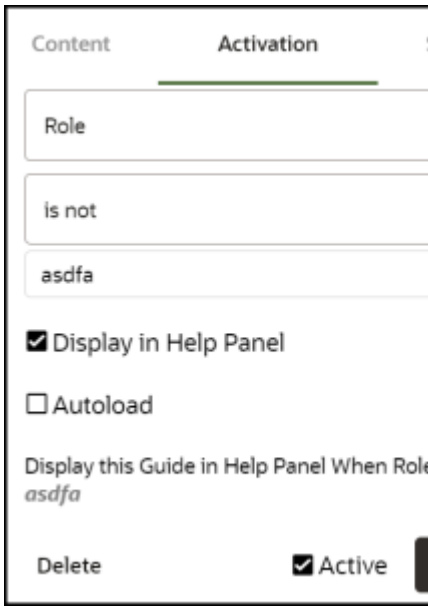
Display When	Description
***Role* IS NOT**	 Displays the guide in the widget **only when the user role is not** = Payables Specialist

Remember: Multiple conditions are joined by the Boolean AND operator. All conditions have to be TRUE for the guide to be activated accordingly (help widget/autoload).

Advanced Conditions

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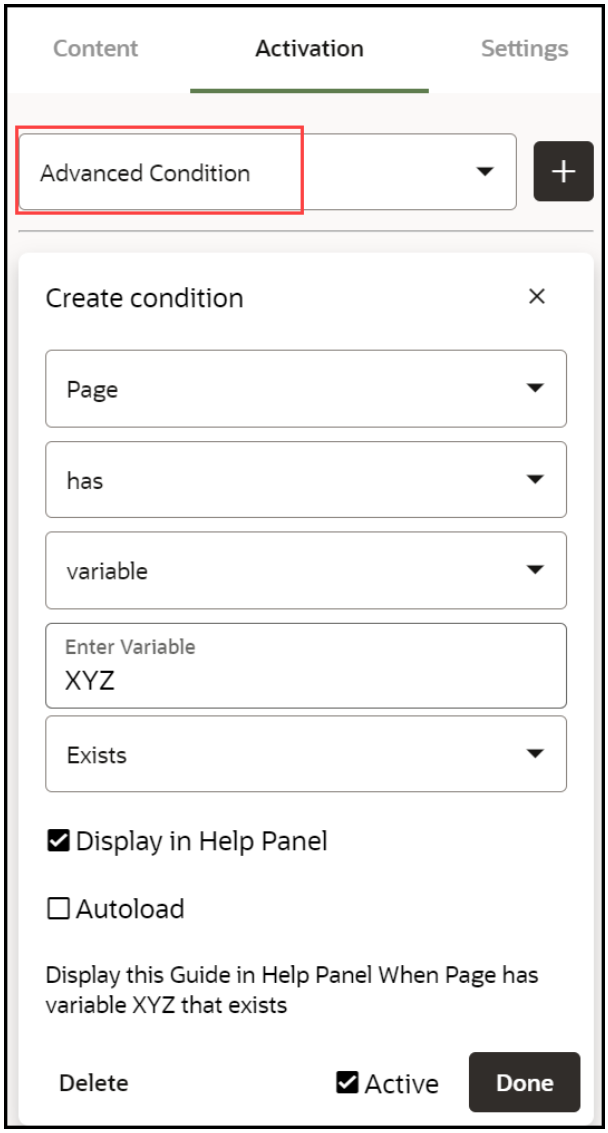

Advanced conditions offer a variety of options in setting activation conditions, this includes multiple user roles. To set a new condition, click on the **advanced condition** button, this will bring up the following interface:

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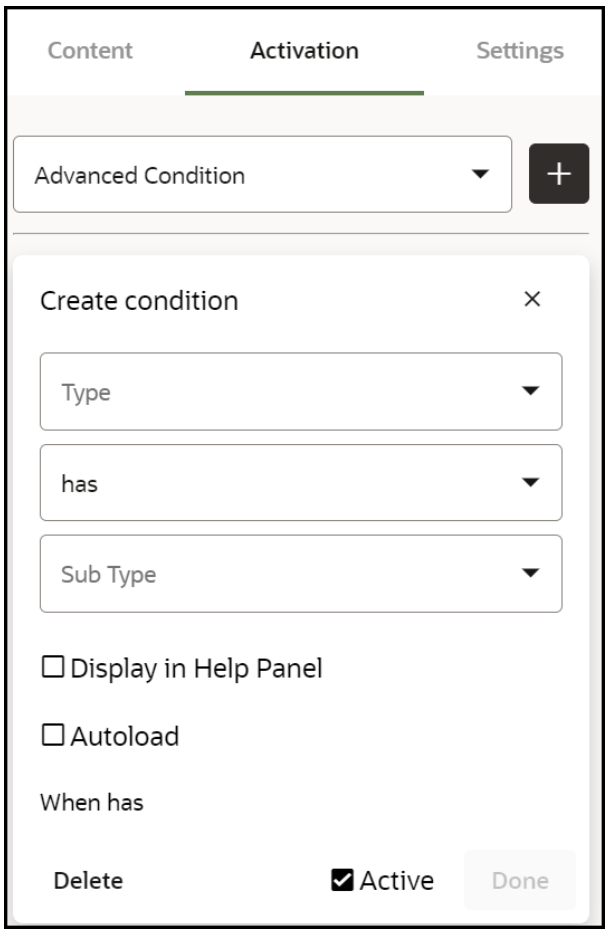
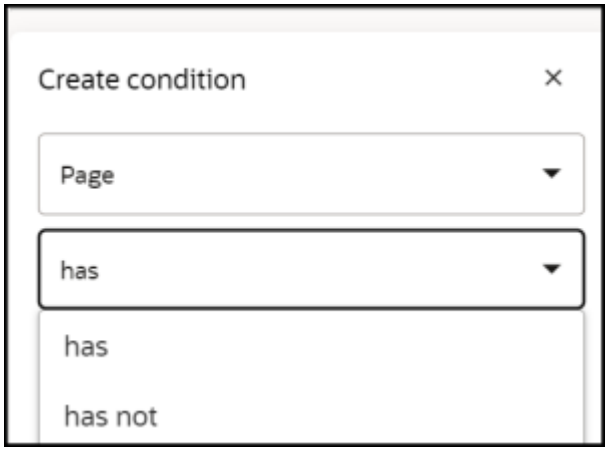


There are four basic combinations in advanced conditions, these are:

- ***Page* has / *Page* has NOT**
- ***User* has / *User* has NOT**

Options within Page HAS / Page HAS NOT:



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Display When *Page* has / Display When *Page* has NOT	Description
URL matching	 Will match against any part of the page's address. You can use regular expressions as well. Use any javascript regular expression by surrounding it with [ ] brackets. For example: [product_id=1.*] will match all URL with product_id's that starts with 1. **Note** Use the **exact** check box if you want the entire path to match exactly with the provided value. Note that the domain (e.g. http://www.your_app.com) will be ignored in this evaluation. • **Curly Brackets {/route/path} ¿ Multiple Matches with || Separator** When you enclose the path inside {}, it allows multiple possible URL matches separated by ||. **Example:**{/home/dashboard || /admin/panel} • **Square Brackets [/route/path] ¿ Regex Matching**

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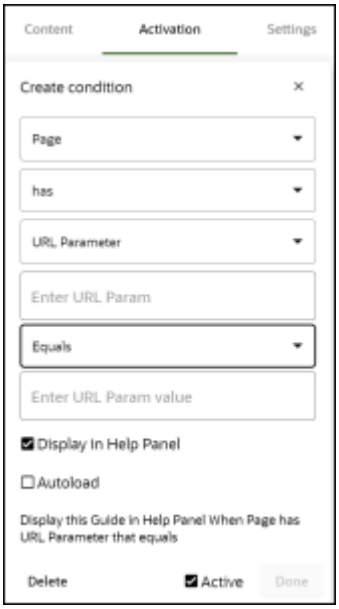
Display When *Page* has / Display When *Page* has NOT	Description
	When a URL path is enclosed in [], the entire content is treated as a regular expression (regex) for pattern-based matching. **Example:** [/home/.*] ¿ This matches any URL that starts with /home/, followed by anything (.* means "match anything"). FUSION APPLICATIONS: Display Guide Only on Certain Pages • You can display guides based on all or part of the URL of the HTML application. For Oracle Fusion, the literal URL string that you see in your browser is not used. Instead, use the page route, which is a descriptive string that substitutes for the URL. You can find the Route by using the Google Chrome DevTools Console. Go to a page in the application, then enter iridize.master.getRoute() in the browser console. You can use all or part of the route to identify the page. Note that if the Route is saved in **Pages**, OGL will automatically convert the condition to a Simple condition.
URL parameter	 Will match against a specific URL parameter. You can either test that the specific URL parameter exists or evaluate its value.

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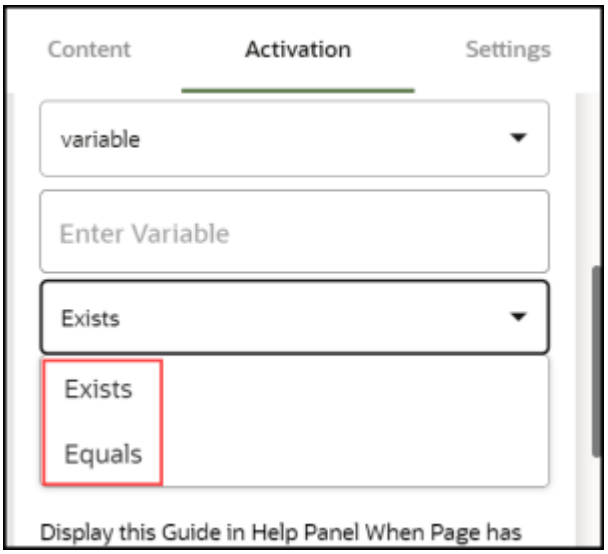
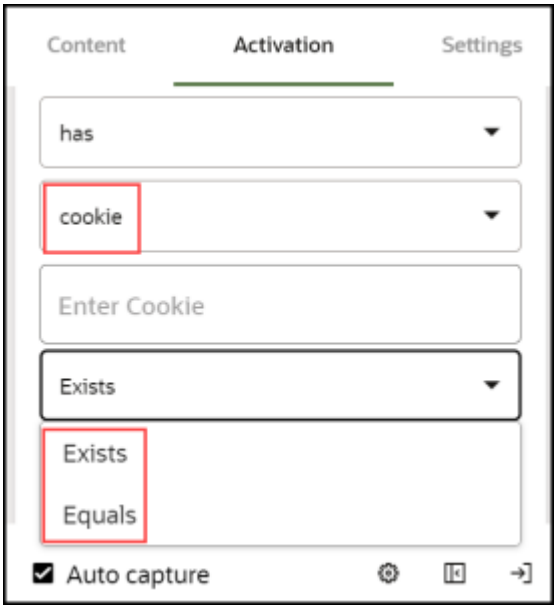
Display When *Page* has / Display When *Page* has NOT	Description
variable	 Will match against a javascript variable. You can either test the existence of a variable or test its actual value.
cookie	 Will match against a browser cookie. You can either test the existence of a cookie or test its actual value.

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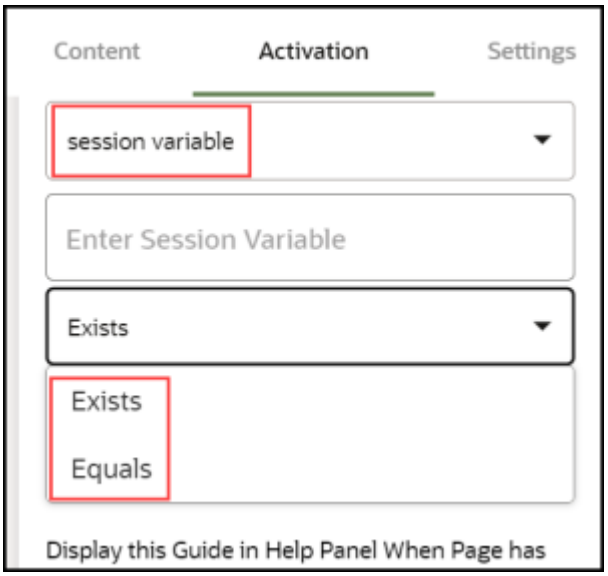
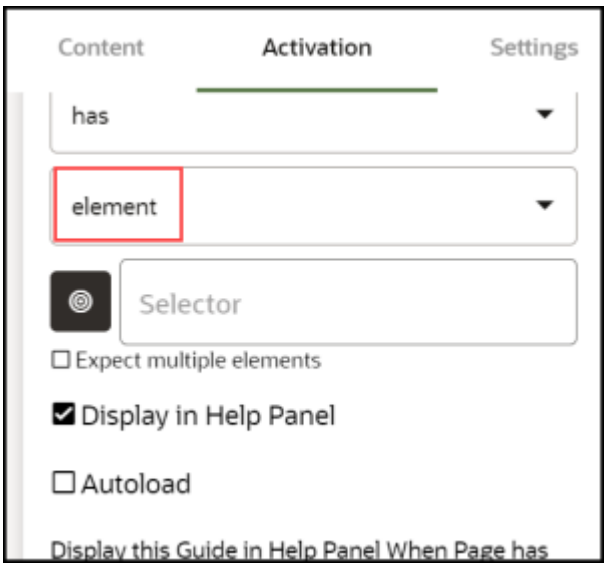
Display When *Page* has / Display When *Page* has NOT	Description
session variable	 Will match against a special OGL variable. The OGL javascript API allows setting session variables that exist only throughout the duration of the currently logged in user. You can then condition your guides to display based on these variables.
element	 Will match against any element on the page's Document Object Model (DOM). You can also extend this condition by telling iridize to wait for multiple objects matching the provided selector.

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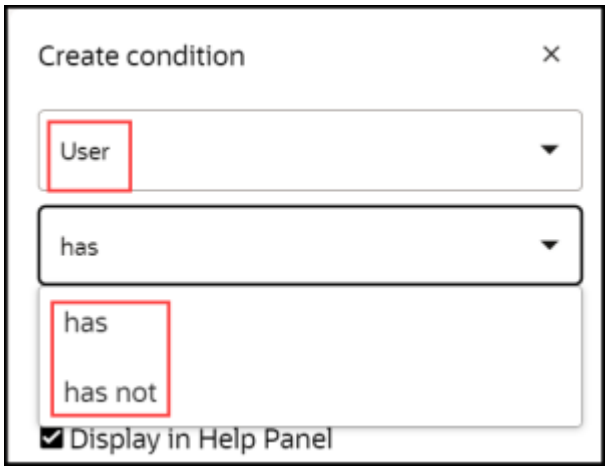
Display When *Page* has / Display When *Page* has NOT	Description
visible element	 Will match against a visible element on the page's Document Object Model (DOM). This is more restrictive than an element condition because in HTML an element can be invisible.

Options within *User* HAS / *User* HAS NOT:



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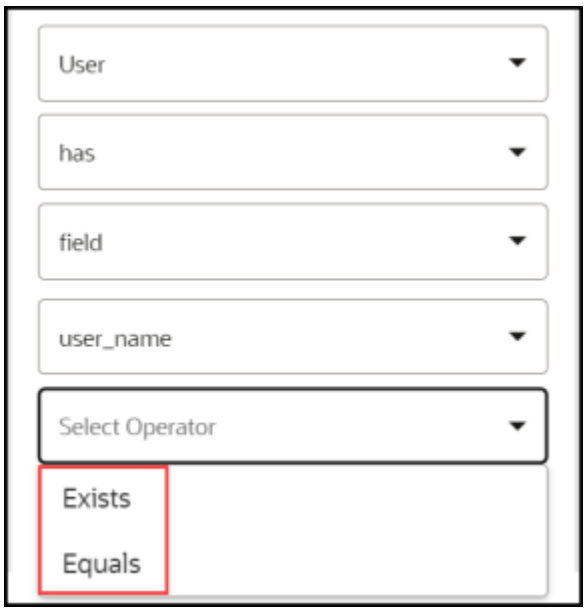
Display When *User* has / Display When *User* has NOT	Description
field	 Will match against a user-specific **field** as it was relayed to OGL using the api.fields.set call. You can either test the existence of a user field or test its actual value. Use this to govern your guides based on user roles, permission level, or user country. **Note**: The required field has to be set/ read in the OGL JavaScript. Please contact us for support. **Multiple User Roles** To set role conditions, the roles must be defined in JavaScript or in the Oracle Fusion configuration. Advanced conditions allow you to associate multiple user roles to a guide/a group of guides utilizing the **OR** operator. When you create a field (*i.e. user_role*) matching condition you can use a regular expression. To tell OGL that the string is a regular expression surround it with square brackets []. So, let's say you have the following roles in your application: **Line Manager**, **HR Manager**, **Payroll Manager** To show an OGL guide only if the user **has** or **has NOT** either of the three roles, the advanced activation condition would be as follows:

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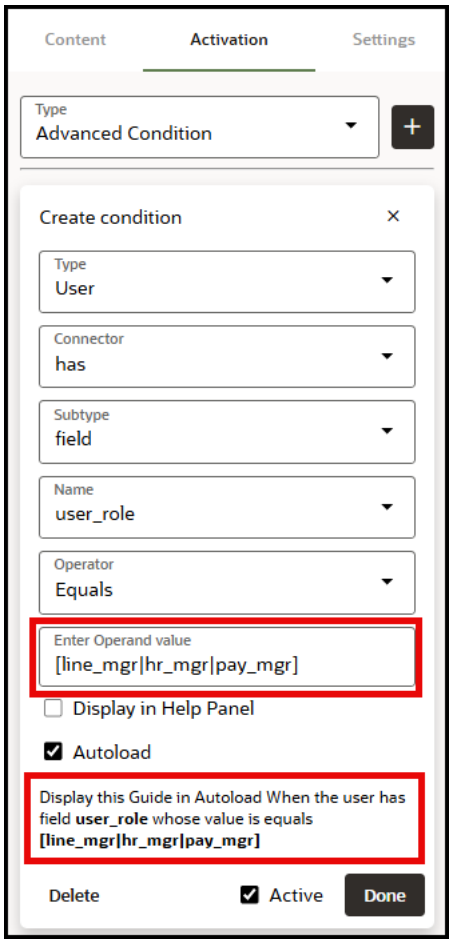
Display When *User* has / Display When *User* has NOT	Description
	

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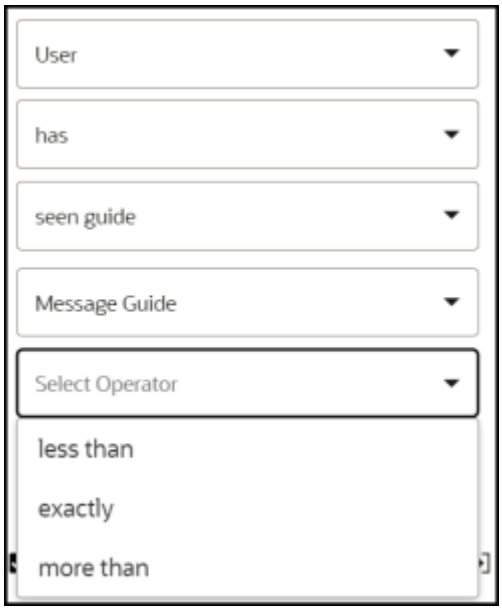
Display When *User* has / Display When *User* has NOT	Description
seen guide	 Will display the current OGL item (in the widget or autoload) if the user has seen the provided guide (*i.e Create Requisition from Catalog*) X number of times in the past. **Note**: If you have guides A, B, and C, you can set the condition such that: Guide **A** is displayed in the widget and/or autoloaded **When the User has or has NOT *seen guide* A/B/C** more than/less than/exactly X number of times.

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Display When *User* has / Display When *User* has NOT	Description
seen guide (timed)	 This type of condition is similar in essence to the **seen guide** condition but it is based on how long ago the user last saw the provided guide (*i.e Create Requisition from Catalog*) instead of the number of times a user has seen the provided guide. **Note**: If you have guides A, B, and C, you can set the condition such that: Guide **A** is displayed in the widget and/or autoloaded **When the User has or has NOT *seen guide* A/B/C** more than X number of seconds ago.

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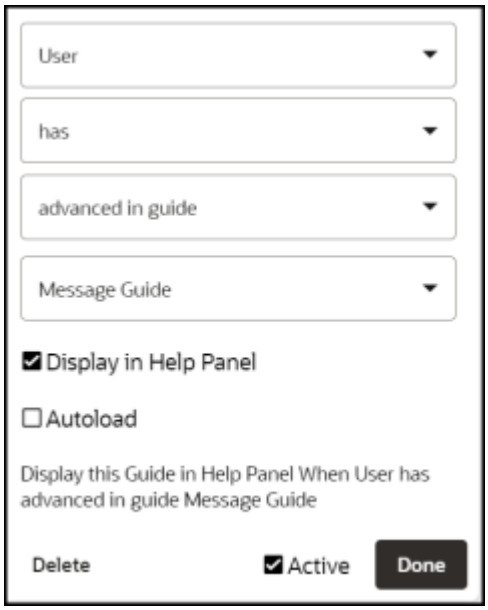
Display When *User* has / Display When *User* has NOT	Description
advanced in guide	 Will match if the user has engaged with the guide at least once. A user is considered to have engaged with a guide if and only if s/he has advanced past the first step in the guide. **Note**: If you have guides A, B, and C, you can set the condition such that: Guide **A** is displayed in the widget and/or autoloaded **When the User has or has NOT *advanced in guide* A/B/C**

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Display When *User* has / Display When *User* has NOT	Description
advanced in guide (timed)	 This type of condition is similar in essence to the **advanced in guide** condition but it is based on how long ago the user last advanced past the first step in the provided guide (*i.e Create Requisition from Catalog*) instead of the number of times a user has advanced in the provided guide. **Note**: If you have guides A, B, and C, you can set the condition such that it is: Guide **A** is displayed in the widget and/or autoloaded **When the User has or has NOT *advanced in guide* A/B/C** more than 86400 seconds ago.

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Display When *User* has / Display When *User* has NOT	Description
closed guide	 Will match if the user has decided to manually close the guide by clicking on the 'X' button located at the top-right corner of one of the tooltips.

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Display When *User* has / Display When *User* has NOT	Description
closed guide (timed)	 This type of condition is similar in essence to the **closed guide** condition but it is based on how long ago the user last closed the guide. **Note**: If you have guides A, B, and C, you can set the condition such that it is: Guide **A** is displayed in the widget and/or autoloaded **When the User has or has NOT *closed guide* A/B/C** more than 86400 seconds ago. Clicking the **Remind me later** button does not count as closing the guide.

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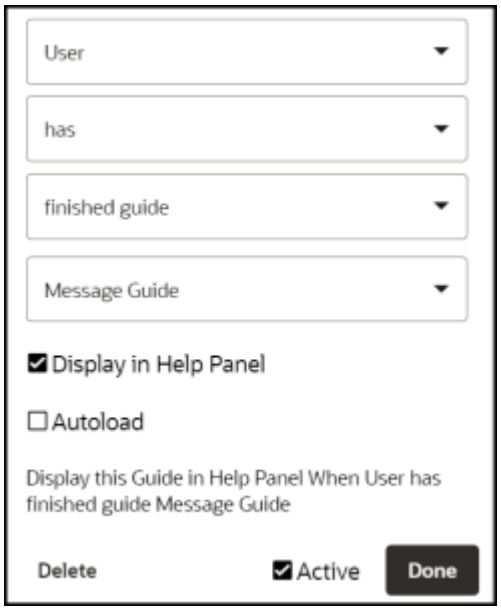
Display When *User* has / Display When *User* has NOT	Description
finished guide	 Will match if the user has gone through the whole guide from start to finish. **Note**: If you have guides A, B, and C, you can set the condition such that it is: Guide **A** is displayed in the widget and/or autoloaded **When the User has or has NOT *finished guide* A/B/C**.

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Display When *User* has / Display When *User* has NOT	Description
finished guide(timed)	 This type of condition is similar in essence to the **finished guide** condition but it is based on how long ago the user last finished the guide. **Note**: If you have guides A, B, and C, you can set the condition such that it is: Guide **A** is displayed in the widget and/or autoloaded **When the User has or has NOT *finished guide* A/B/C** more than 86400 seconds ago.

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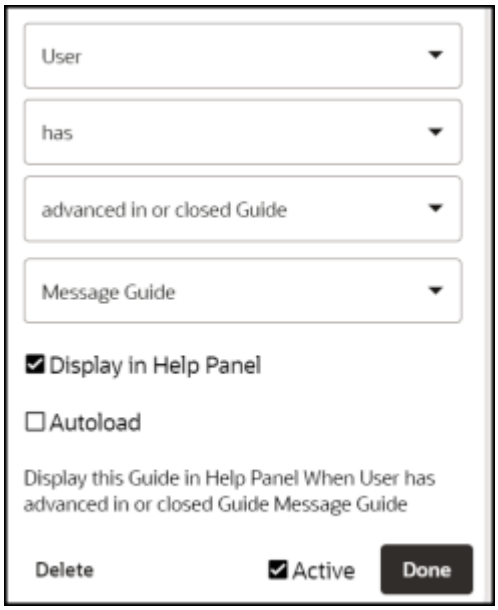
Display When *User* has / Display When *User* has NOT	Description
advanced in or closed the guide	 This condition is a combination of the Advance in Guide and the Closed Guide conditions. It will match if the user has either engaged with the guide or closed it manually. **Note**: The **Remind me later** button does not count as closing the guide. So using this condition in combination with the Seen Guide condition "completes" the remind me later functionality.

Time Condition

A time condition allows you to set when and for how long a guide should be displayed in the widget or autoloaded.

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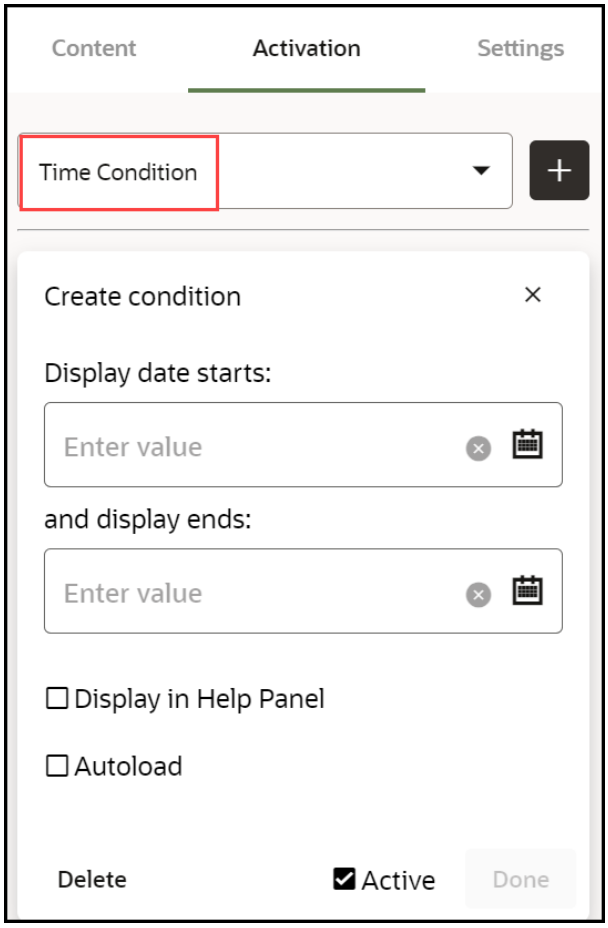

In the example below the guide is set to display for a period of seven days, commencing on March 15, 2024.

Important: The time condition does not auto-adjust for different time zones, if the target audience is in a different time-zone to the person setting the condition, the difference in time needs to be considered and where necessary, adjusted by the person setting the condition.

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OGL Standard Roles

Click here to download a list of Role mappings.

Autosegmentation

AutoSegmentation works with any application that provides OGL with page information. AutoSegmentation also ensures that the widget displays only the guides relevant to the page the user is currently on. When selecting a guide from the widget, it will begin on the first step on the page that the user is on. In addition, the account and – if used, the embedded JavaScript-- must be configured for AutoSegmentation. Contact your Oracle/OGL account manager to verify that your account is properly configured.

AutoSegmentation occurs automatically. OGL stores the page location (or Route) as you select elements while creating guides. OGL then uses those pages to build the default Activation Condition for the guide. The AutoSegmentation pages are used instead of a standard URL to identify the pages where the guide can be run. The following image shows the Activation Condition automatically created by AutoSegmentation (this condition is identifiable by the Auto-Generated tag):

To ensure auto segmentation works as intended, we recommend you do not change the default activation condition.

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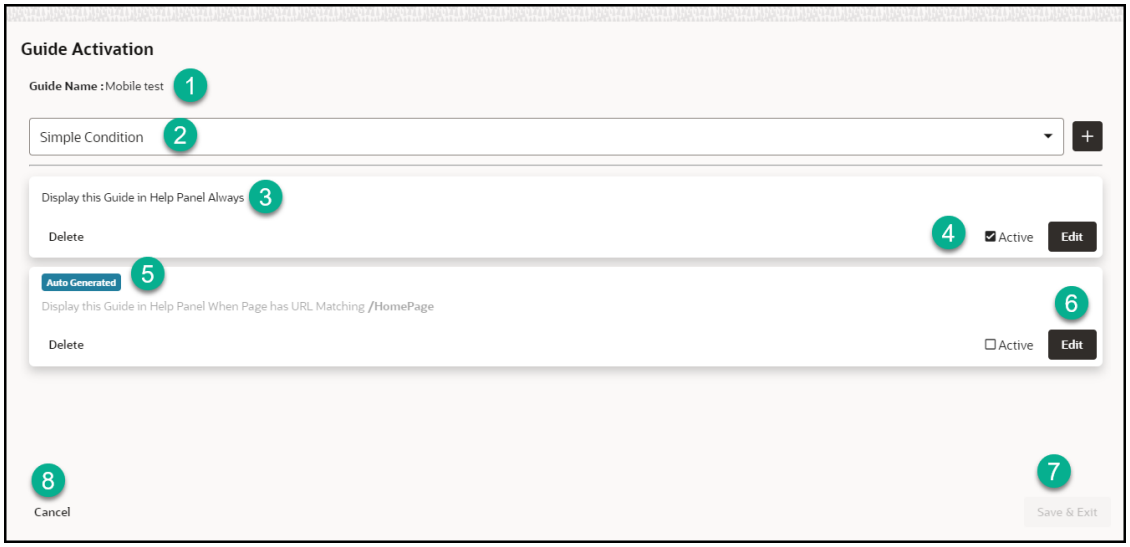
Current status as of March 2024
A brief explanation of the guide's condition summary (3):

- syntax:



- **{cond1 || cond2 || [cond3]}**
- '**cond1**', '**cond2**', '**cond3**' are placeholders for specific condition or url part
- '||' signifies the logical OR.
- '[]' brackets indicates that the enclosed condition ('**cond3**') is using regex matching
- Curly braces '{}' denote that the conditions inside them are of exact matching, implying that '**cond1**' and '**cond2**' are checking for exact values or matches without pattern
- inside the square brackets we can use '|' symbol within a regular expression

Guide Activation Enhancement

Guide Activation functionality has been enhanced to enable developers to target content more accurately to specific end-users for more content personalization. This enhancement allows content developers to create user-based advanced conditions based on the end-users' actions; such as interacting with hotspots, completing task lists, or responding to surveys.

This enhancement includes an update to the UI/UX in both the Guide Activation modal and Full Editor within the Advanced Condition settings for user-based conditions:

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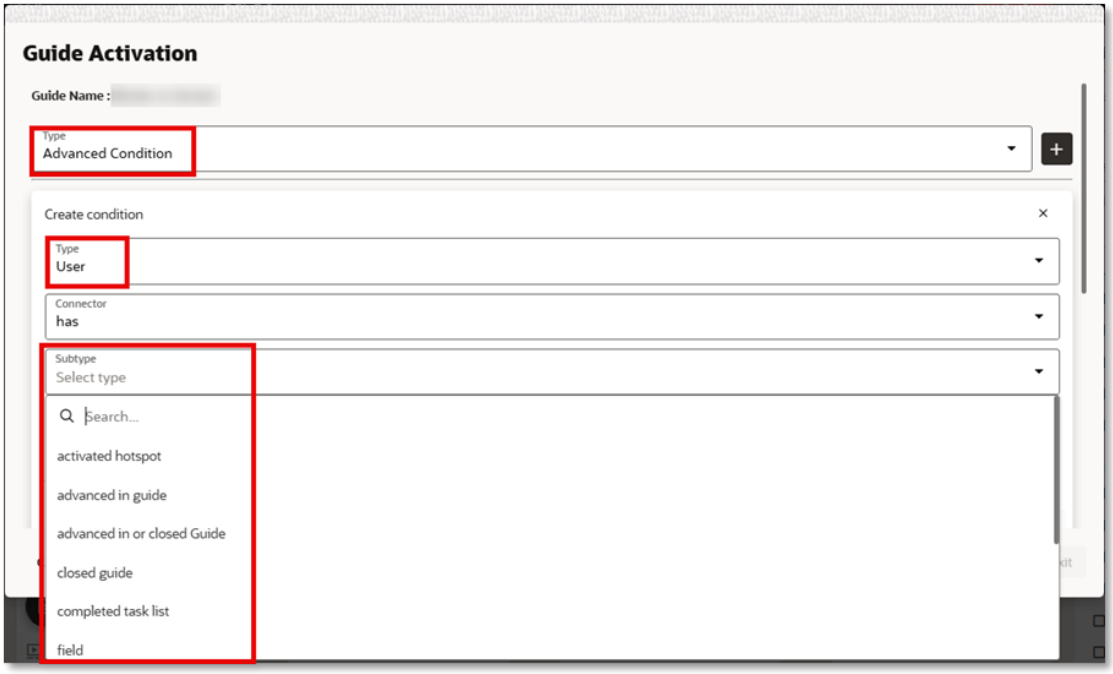

Newly added Subtypes:

- Activated hotspot – When a user interacts with and activates an active hotspot in the application.
- Completed task list – When a user completes all tasks in an active task list
- Responded survey – When a user advances beyond the first step in an active survey guide

This enhancement also adds a **Time Limit – more than # ago** setting to the condition to allow developers to specify additional time-based settings to the condition:

- Activated hotspot – When a user interacts with and activates an active hotspot in the application.
- Completed task list – When a user completes all tasks in an active task list
- Responded survey – When a user advances beyond the first step in an active survey guide

This enhancement also adds a **Time Limit – more than # ago** setting to the condition to allow developers to specify additional time-based settings to the condition:

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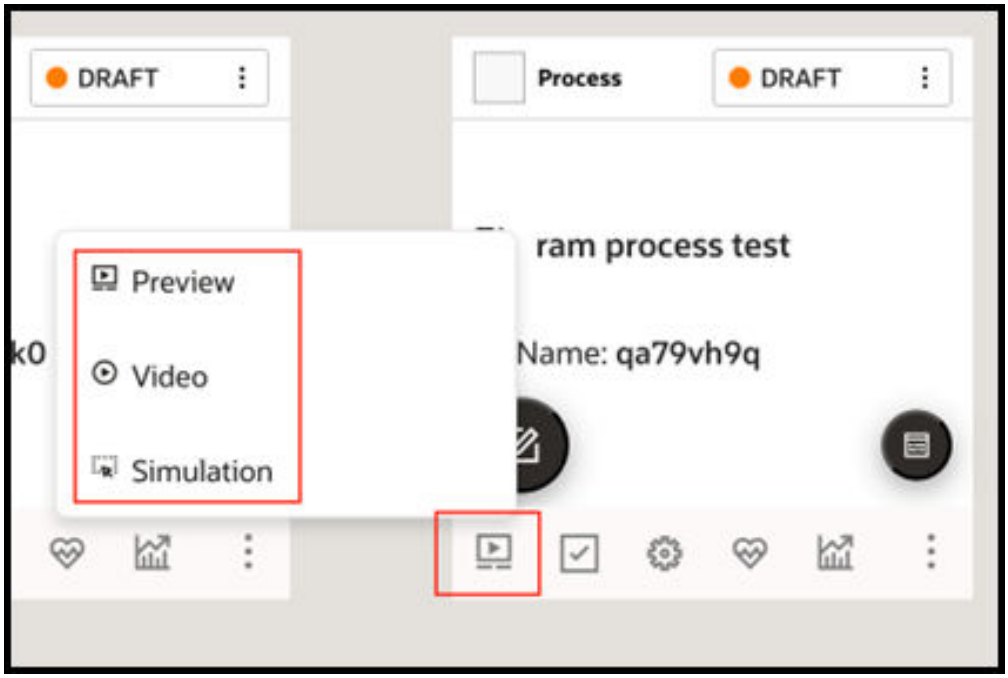
Preview Modes of Process Guides

When working with Process Guides, you have the option to experience and validate the guide in different ways before sharing it with end users. The following options allow you to see how the guide will appear or behave in various formats.

- **Preview**
- **Video**, and
- **Simulation**



Preview

Opens the guide in a new browser tab, allowing you to walk through the steps as they would appear to a user. This helps ensure the content, flow, and triggers are functioning as intended.

Video

Generates a video-style preview in a new browser tab. This format displays each step along with its corresponding screenshot and tool tip, providing a complete visual walkthrough of the guide.

Simulation

Introduced into the product in Release 24C, Simulations launches an interactive version of the guide in a simulated application environment. Users can follow along step-by-step, practicing actions just as they would in the real application. This is especially useful for training and onboarding scenarios where hands-on experience is important.

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> **Note**
>
> For Simulations to function as intended, ensure that **Global Image Capturing** is set to **Enabled** in a Simulation-enabled account. Simulation playback relies on screenshots captured during the guide creation process. Once a Process Guide is created and saved, Simulation playback should be automatically available.

Pre-requisites & Expected Behavior for Simulation

- **Availability**
  - Simulations is automatically available for OGL accounts provisioned after the OGL 24C release (post July 7, 2024).
  - Administrators of existing accounts (prior to July 7) must reach out to their OGL point of contact to enable Simulation. (Please note that Simulation is not available for included/base accounts.)
- **Content Compatibility**
  - Simulations is not automatically available on content created before the feature was enabled.
  - To enable Simulation preview mode on legacy guides, Content Developers must re-capture screenshots for all steps. This applies to both Base guides and Use Cases copied into the Content Library.
- **Behavior in Simulation-enabled Guides**
  - In guides built with Simulation, tool tips will not appear within the screenshots on the Content Editor or in Step Guide/Job Aid view.
  - Instead, a blue border highlights the selector point on each step.

Simulation & Video Playback Settings

Simulation and **Video** modes can also be configured to be displayed to end users on process guides visible in the help widget, offering them additional ways to consume and interact with the guide content.

Users with the appropriate permissions can manage the availability of **Simulation** and **Video** preview modes for the **DEV** and **PROD** domains through:

Settings > Application > Capture & Playback

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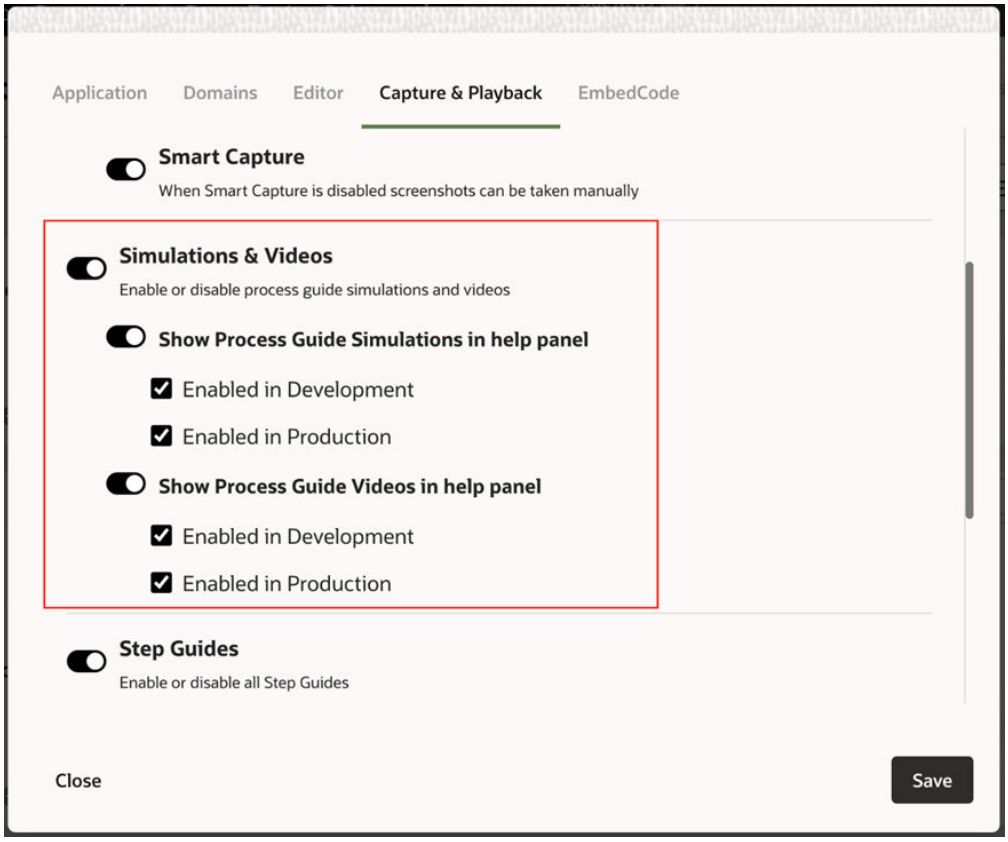

These settings are also available at the guide level for individual Process Guides and determine whether these preview modes are visible to end users.

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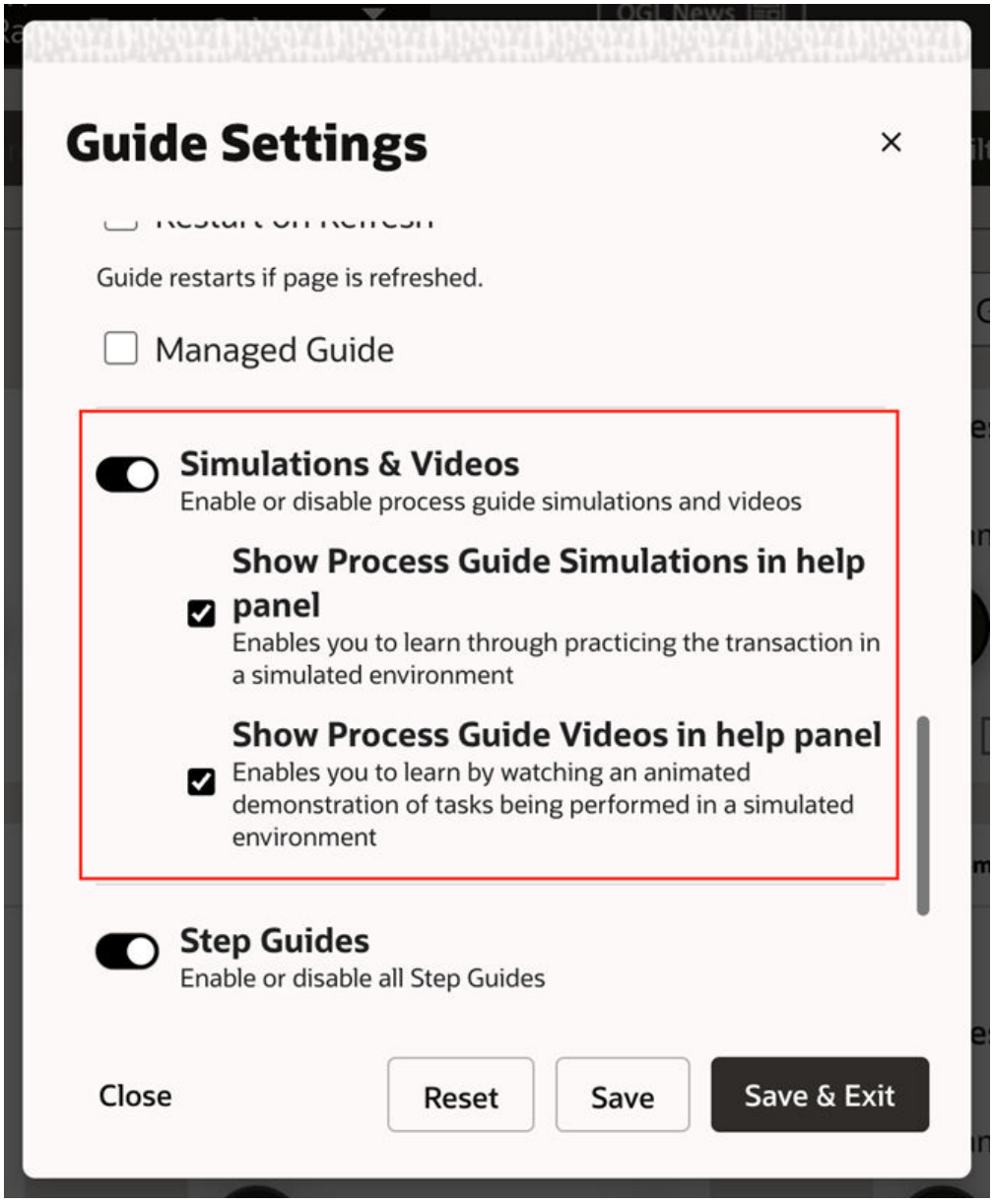

- If **Simulation or Video is disabled at the account level**, enabling it at the guide level has **no effect**.
- If enabled at the account level, you can choose to **disable Simulation or Video for specific guides**, giving you control over how content is consumed.

> **Note**
>
> Simulation links generated from the OGL Help Widget/Panel can be shared outside the widget and embedded into external webpages or applications that accept link inputs. Please note that simulation links generated directly from the console are not shareable.

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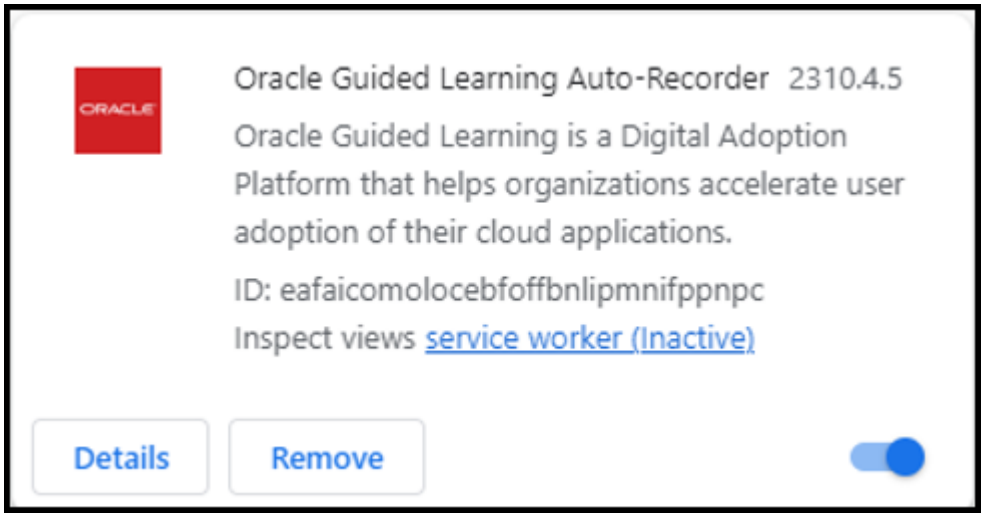
Quick Guide Builder (Auto-Recorder)

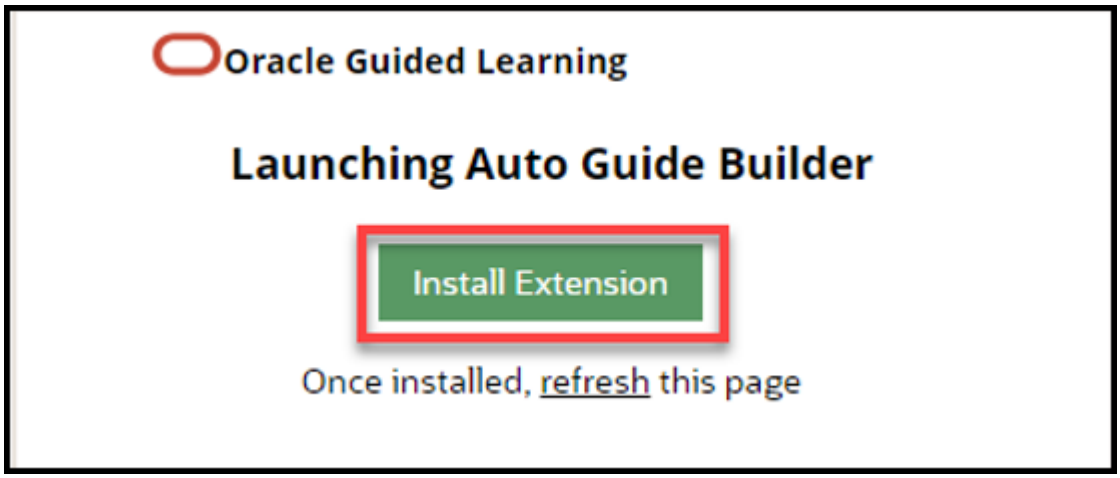
The Quick Guide Builder feature allows process experts and developers to quickly create prototypes of process guides by simply recording a navigation process in the host application without the need to identify HTML element selectors. Once recorded, a process guide is automatically created which can be then edited and configured using the OGL Guide Editor or Content Editor. This can be especially helpful for developers and content creators to enhance their collaboration with process experts when creating guides.

Oracle Guided Learning Auto-Recorder Extension Required

The Quick Guide Builder feature will require a separate Google Chrome browser extension called “Oracle Guided Learning Auto-Recorder” (Version 2310.4.5), which is available from the Chrome Store.



When recording your first process guide using the Quick Guide Builder, you will be prompted to install the extension. If you see the following message, select Install Extension to proceed.



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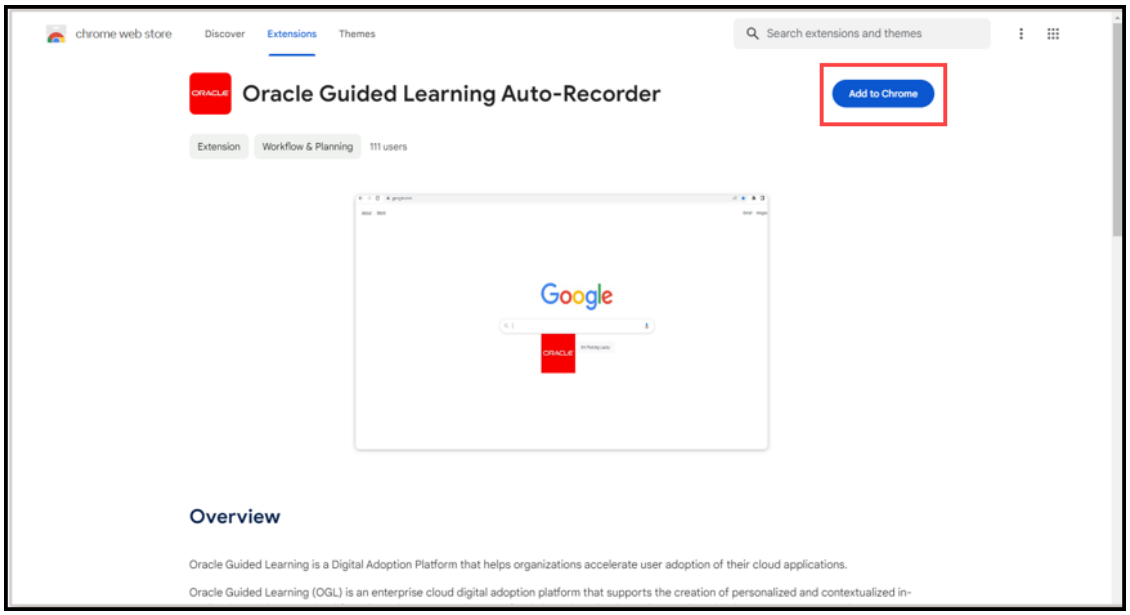
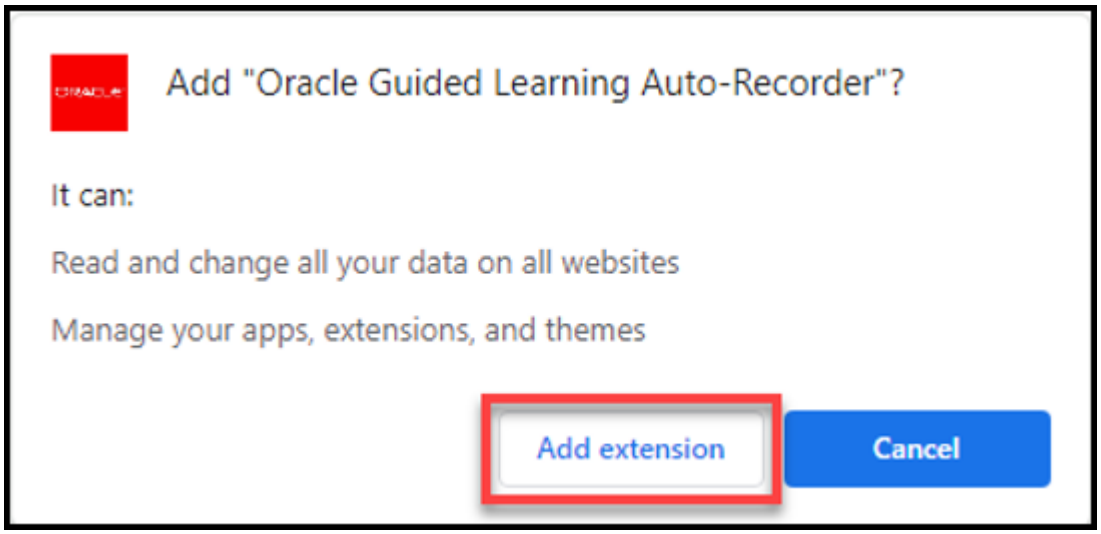
From the “Oracle Guided Learning Auto-Recorder” extension page, select **Add to Chrome**.



When prompted, select **Add extension** to proceed with the installation.



If necessary, close the Extensions tab to return to the OGL editor. **Refresh** the page to continue, if needed.

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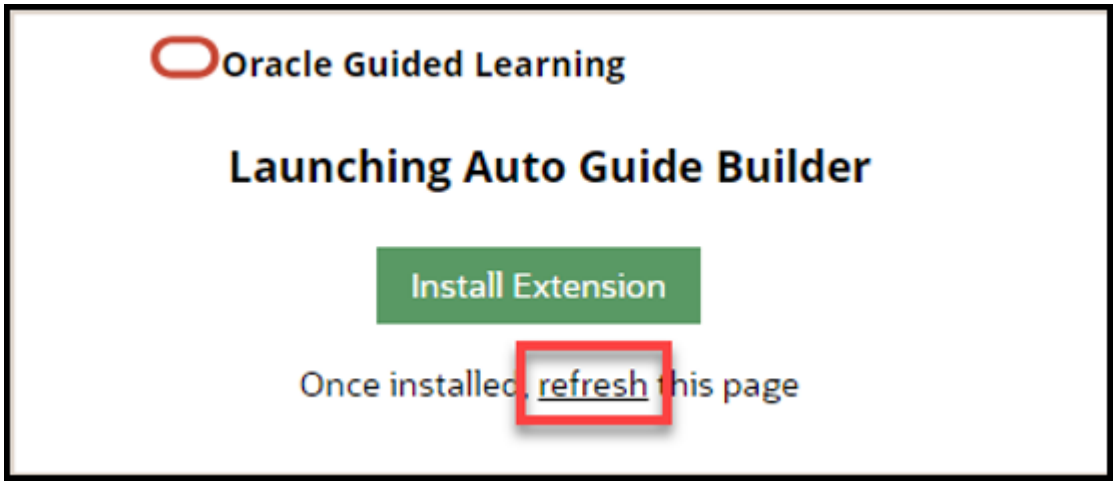
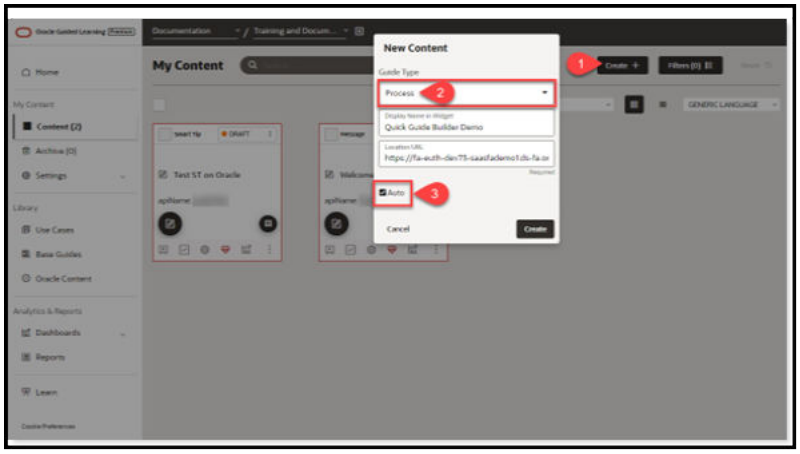


Quick Guide Builder Process Flow

Follow the steps below to create a Process Guide using the Quick Guide Builder feature. Simply use the “Auto” checkbox to record a process and automatically create a process guide.

1. From the Content page, create a new content item using the **Create+**
2. In the New Content modal, select Process in the Guide Type drop down menu, enter a display name and location URL.
3. Select the “**Auto**” checkbox to enable the Quick Guide Builder.
4. Select the **Create** button to start



> **Note**
>
> If this is your first time recording a process with the Quick Guide Builder, you will be prompted to install the Oracle Guided Learning Auto-Recorder browser extension, as shown below. (Refer to the “**Oracle Guided Learning Auto-Recorder Extension Required**” section above. Once the extension is installed, continue to **Step 5**.)

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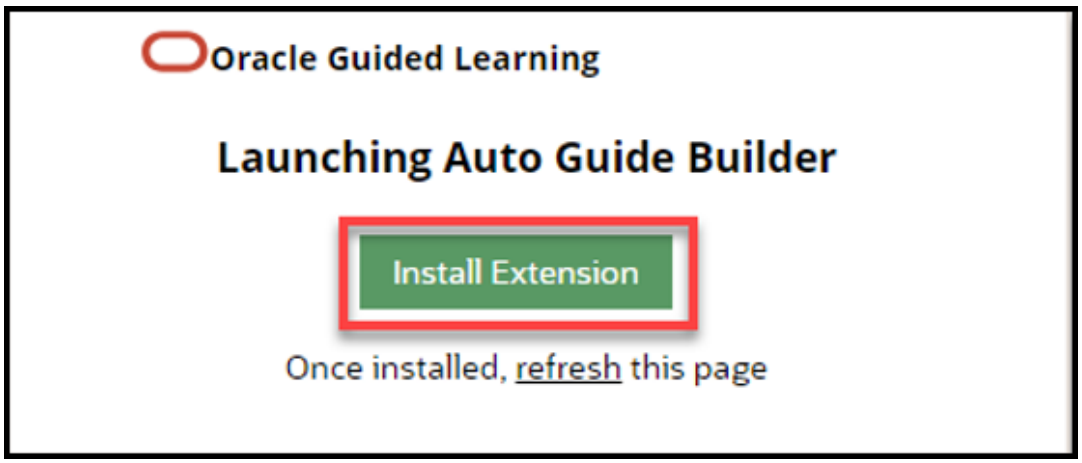
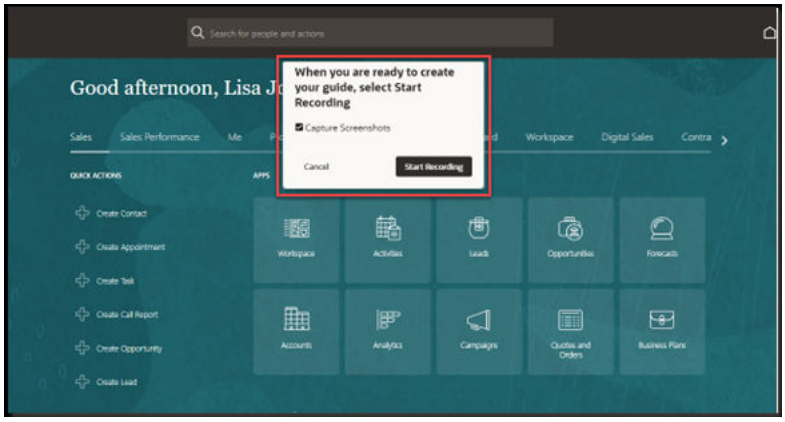


5. In the host application, you will see the Auto-Recorder open on the screen instead of the OGL guide editor. When ready, select the **Start Recording** button to begin recording the process. (**Note**: Select the “Capture Screenshots” option if you want the Auto-Recorder to capture screenshots with each step.)



6. While recording, notice the recording toolbar at the bottom of the screen that indicates the number of steps captured.

> **Note**
>
> If the “Advance on Click” option is checked, the Auto-Recorder will automatically apply an activation setting to advance the step when the user clicks the element.

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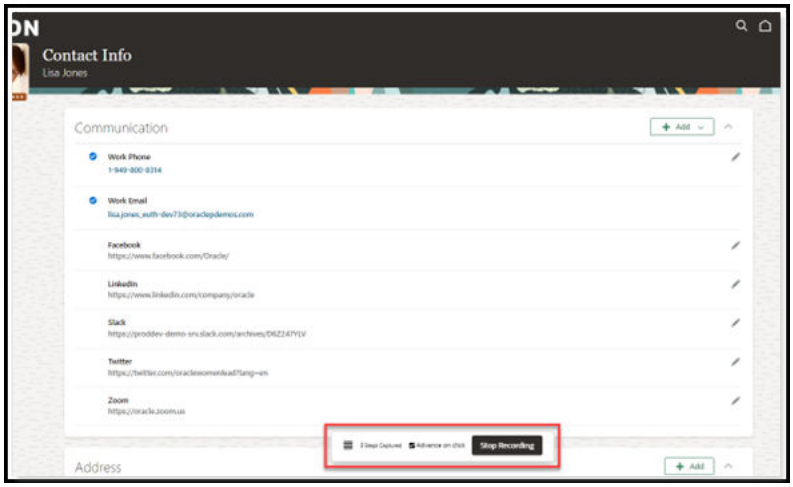
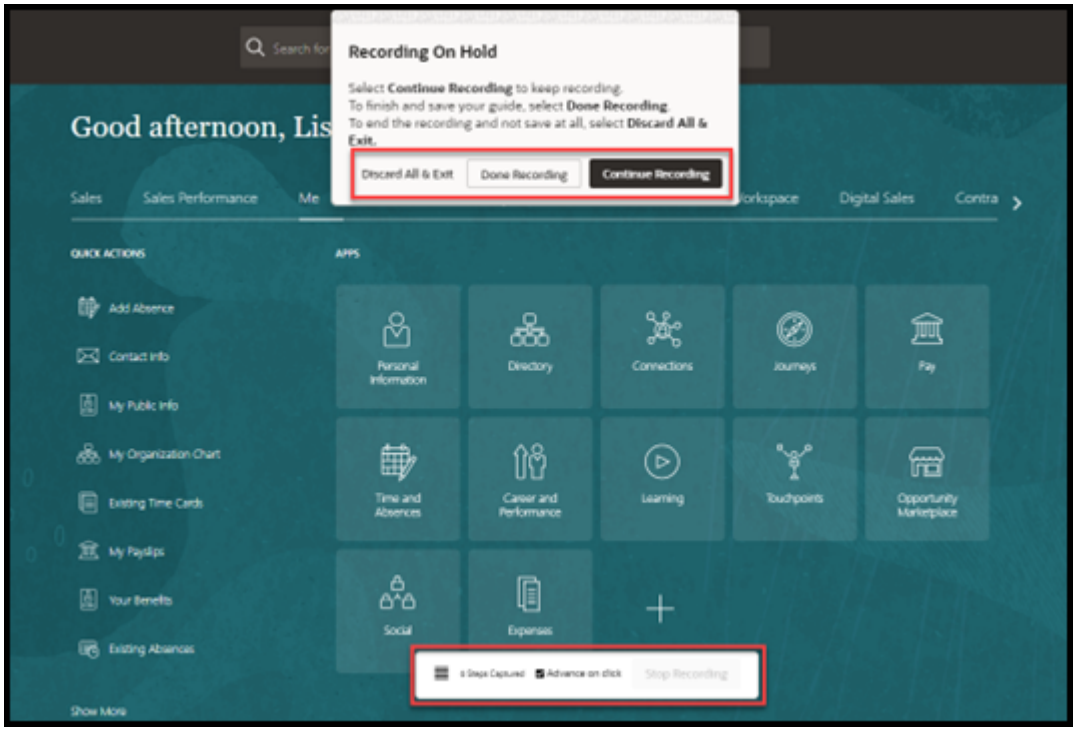


7. While recording, you can stop the recording at any point during the process and choose **Discard All & Exit**, **Done Recording**, or **Continue Recording**. To finish and save the guide, select **Done Recording**.



8. Once the recording is complete. A new process guide will appear in the My Content page where it can be further edited and configured using the OGL Guide Editor just like any other process guide.

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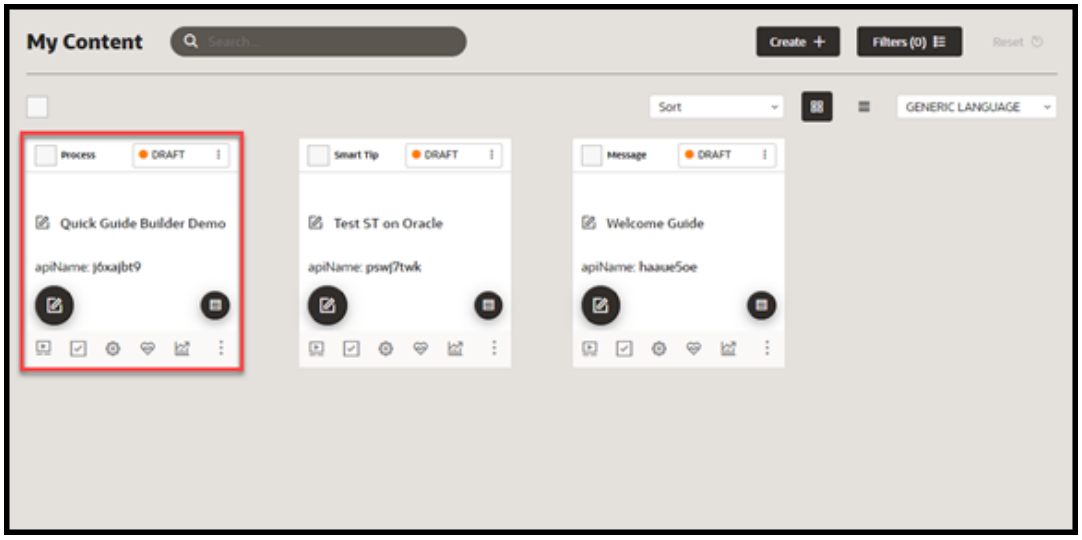
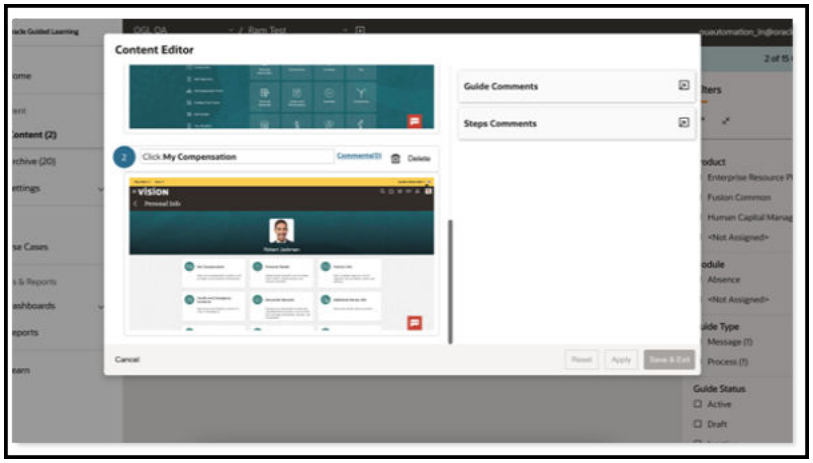
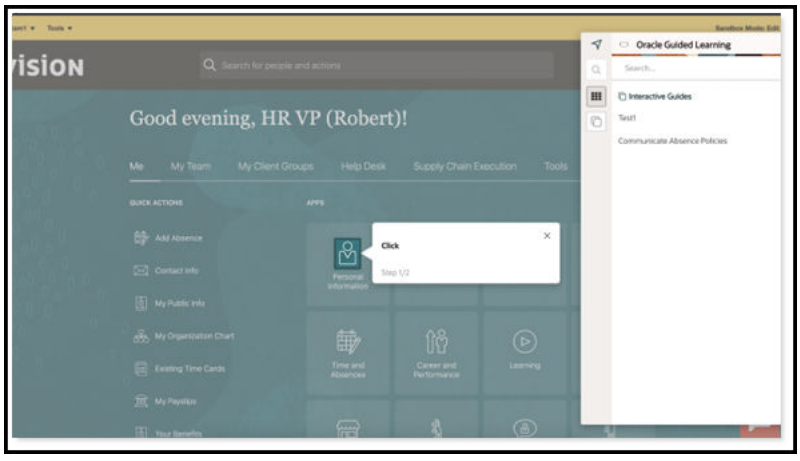


9. The guide can also be edited using the Content Editor to make simple text and formatting edits.



10. The guide can now be deployed to the host application for further testing or publishing.



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Known Issues/Expected Behavior of Quick Guide Builder in 23D release

The following are known issues that have been identified in the development and initial testing of the Quick Guide Builder feature. These issues will be resolved, addressed, or remediated in a future release. Please note these issues prior to submitting any service requests with the Support Desk.

- Quick Guide Builder is currently only available for creating Process Guides.
- No Auto-segmentation for pages/routes will be applied.
- Guides created with the Quick Guide Builder will apply an auto-generated guide activation condition set to “Display the guide in the Help Panel Always”. Any additional guide activation conditions will need to be manually configured.

- Navigating from one page route to another in the host application is achieved with the **Advance on click** setting, which is enabled by default (no form elements or Next button on tool tips).

By enabling this option while recording, the Quick Guide Builder will automatically apply an advanced an activation setting to advance the step when the user clicks the element. This setting can be changed in the Full Editor after recording, as needed.

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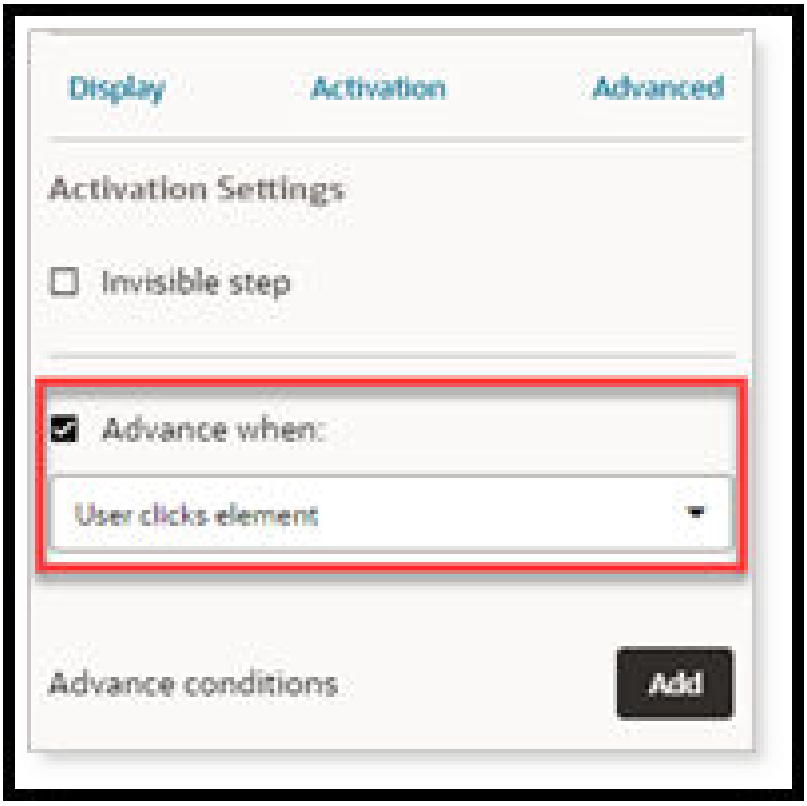


- OGL Widget is showing while Auto Recorder is active – Quick Guide Builder functionality allows users to switch between active tabs as well as windows and the recording jumps to that tab/window. The user could have a fusion instance already open prior to launching the Quick Guide Builder, so we will not be able to block the player from loading.

Creating Non-Process Guides

Creating a Message Guide

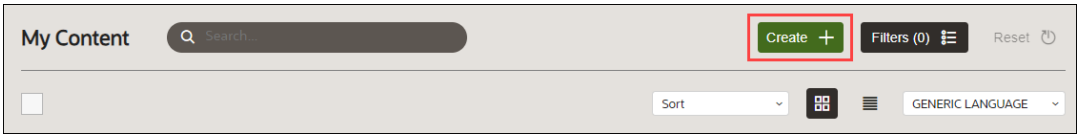
Use Message Guides to provide notification content.

To create a Message Guide:

1. On the OGL console Homepage, select **Message** in the Create row.

Or

On the My Content page, select the (Create) button.



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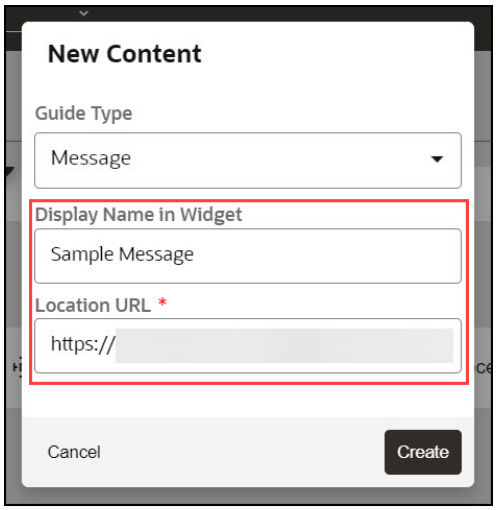
The New Content modal appears

2. Select **Message** from the Guide Type drop-down menu.
3. Enter the **Display Name** and the **Location URL**.

> **Note**
>
> The following characters are not allowed: **/ \ | : " < > ?**



4. Select the **Create** button (

) to launch the OGL Editor.
The OGL Editor launches in a new tab, where you can start capturing the contents of the guide.

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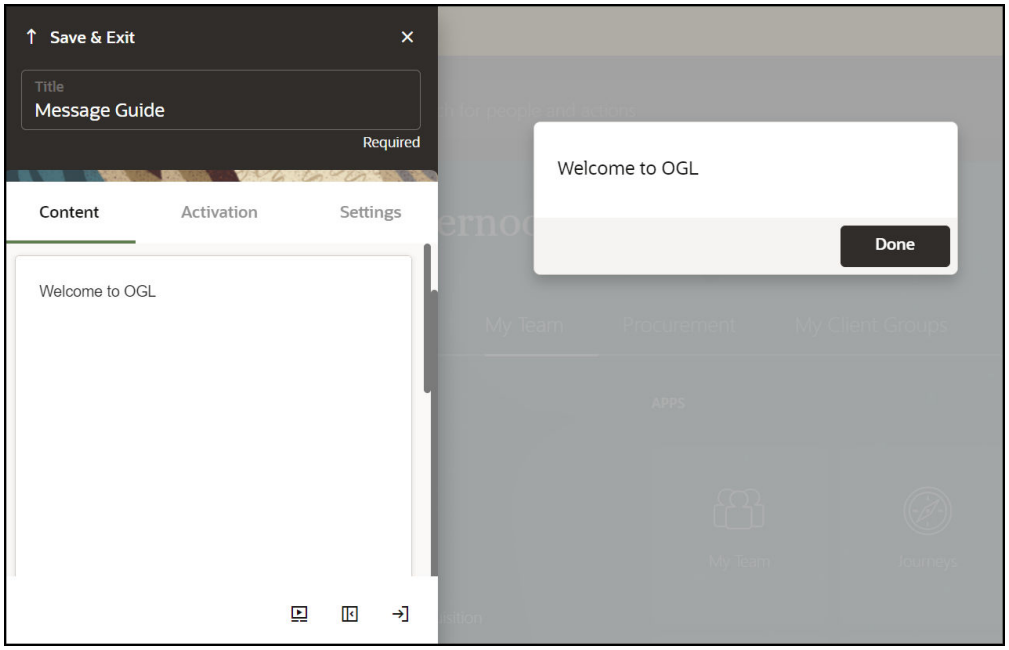
> **Note**
>
> The editor appears as an overlay on your application.

5. Select the (

) button to display a message on the page.
6. Enter your message text into the **Message** field.
   A live preview of your text will appear in the message as you type.



7. Scroll down to view more tools options.
8. Format your text, as required.

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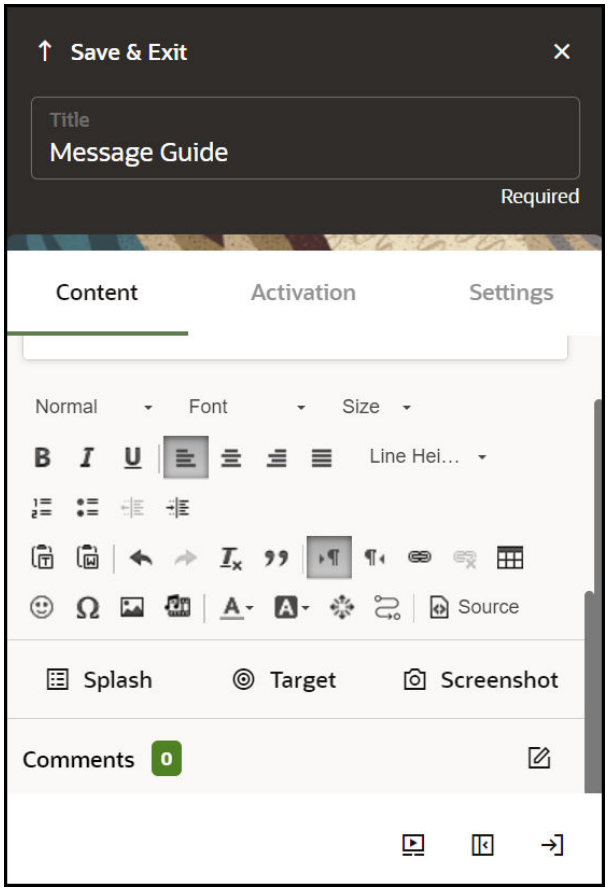

9. Select **Save & Close** to exit the full editor.

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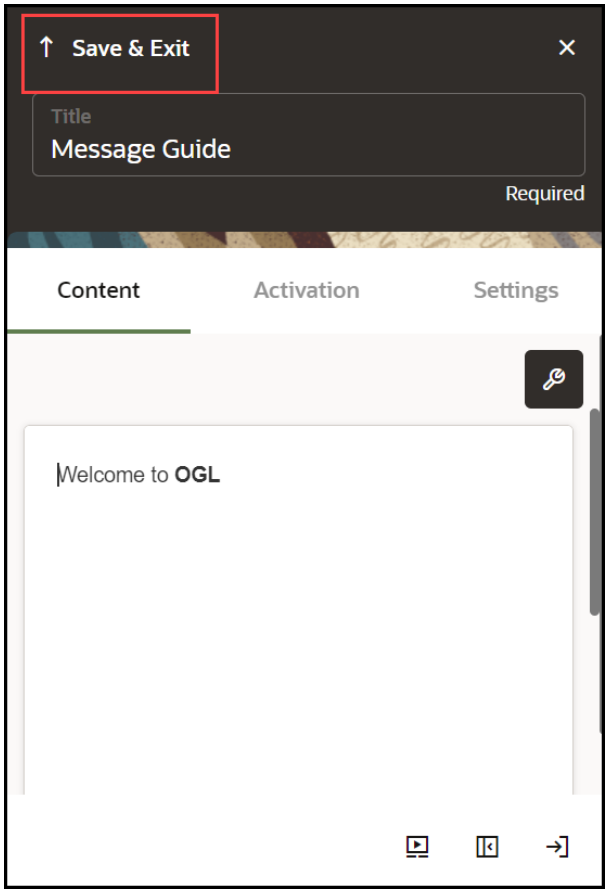

> **Note**
>
> After creating a message, you may need to check and configure the Guide Activation Settings to ensure that the guide displays and behaves correctly. For more information, refer to the Enabling Guide Activation Settings section.

Creating a Task List

What is a Task List?

A Task List represents a group of related guides, usually performed sequentially. Task lists also track the user's progress as they complete each task in the list.

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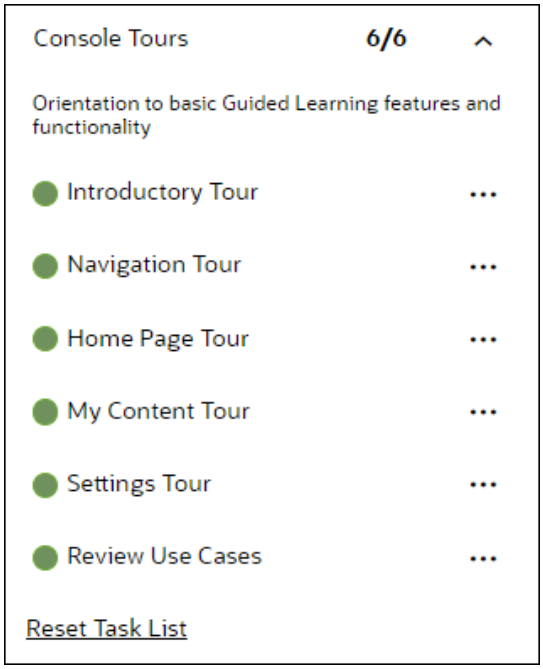

Task Lists can be used for:

- Training flows that walk your users through a new software platform.
- Onboarding sequences that train and certify new employees.
- Pre-defined checklists that users need to complete while working on a certain process.

To create a Task List:

1. On the OGL console homepage, select **Task List**.

The New Content modal dialog is now displayed.

> **Note**
>
> The following characters are not allowed: **/ \ | : " < > ?**

2. Enter the **Display Name** and the **Description**.

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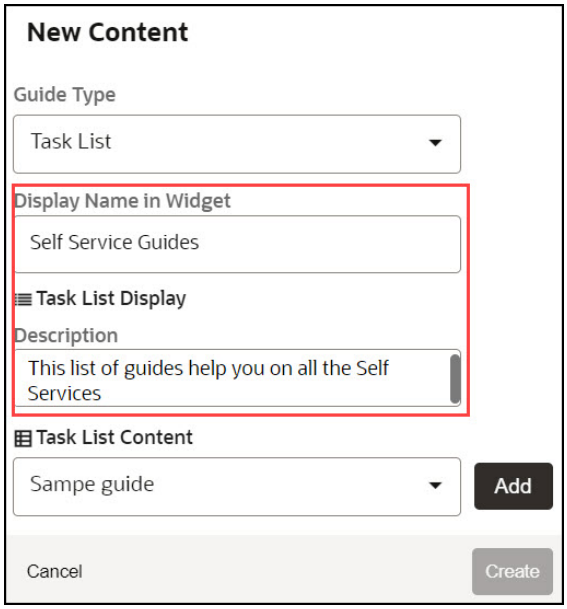
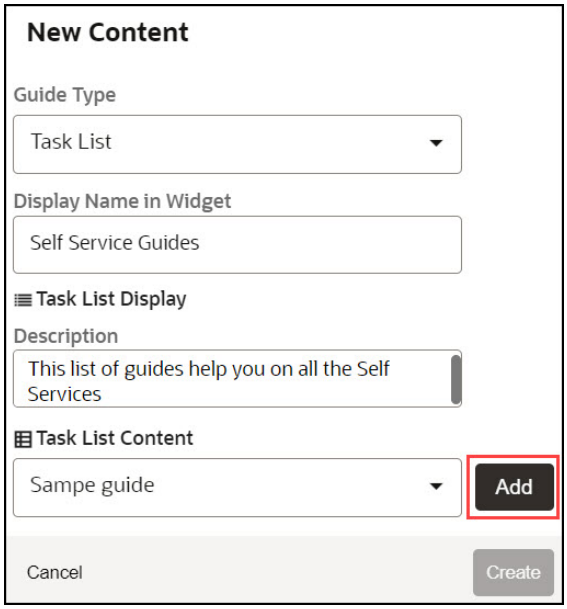


3. Use the **Task List Content** dropdown to add guides to your **Task List**.
   a. Choose the guide from the dropdown and select **Add**.
   b. Add multiple guides from the dropdown as required.



4. Check the option **User can reset progress** to enable users to reset the progress.

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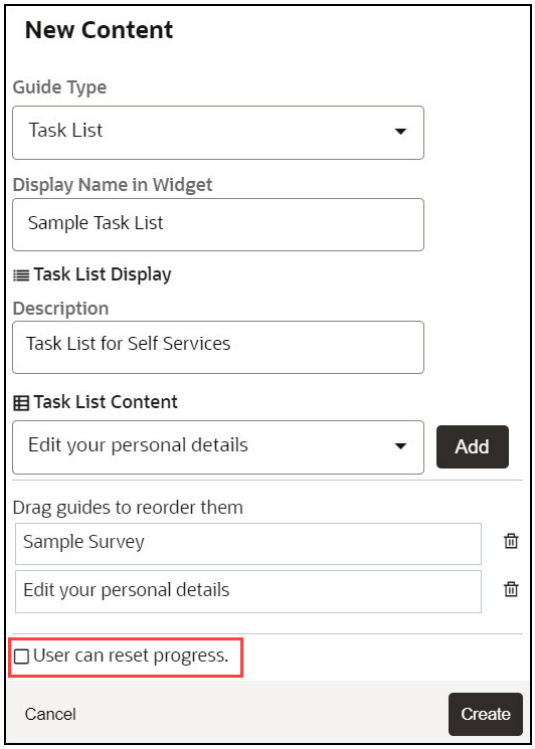
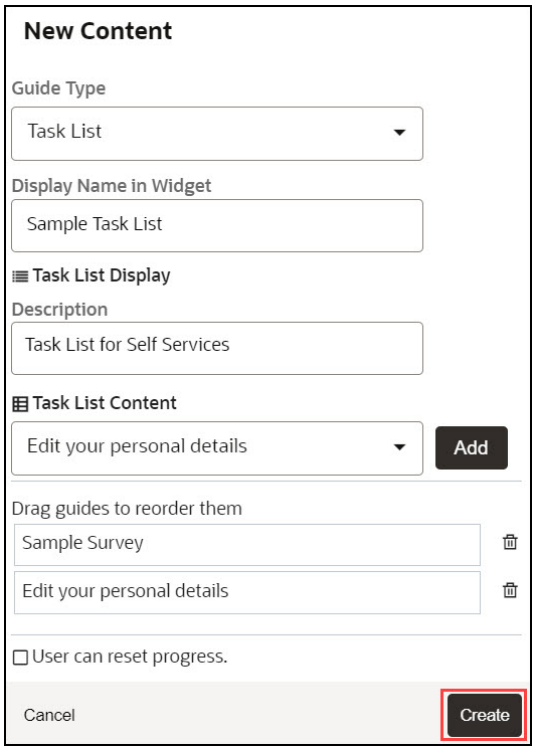


5. Select **Create**.



The **Task List** is now created.

6. Configure guide activation settings, as needed, by selecting **Guide Activation** in the guide tile.

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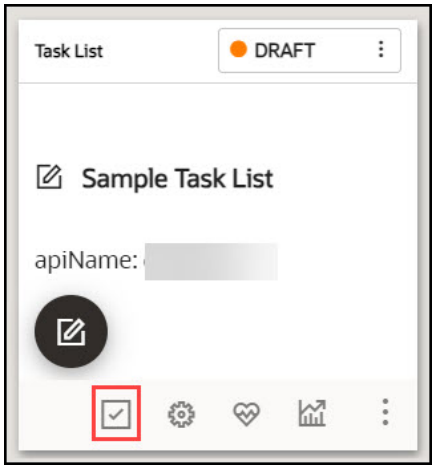

> **Note**
>
> Remember to set your activation conditions, refer to Enabling Guide Activation Settings section. For multi-language deployments, refer to the *Translations* section.

Creating a Launcher

What is a Launcher?

Launchers take advantage of the existing event listener capabilities. This allows OGL to track user events such as clicks and key presses. We use these events to launch an OGL content item, and these OGL items are intended to inform users of new information, assist them in completing a task, or serve as a reminder of internal policies and procedures.

> **Important**
>
> Launchers cannot read user data; they are only limited to identifying actions performed by the user on the application.

The image illustrates what the set of invisible Launchers would look like on the backend.

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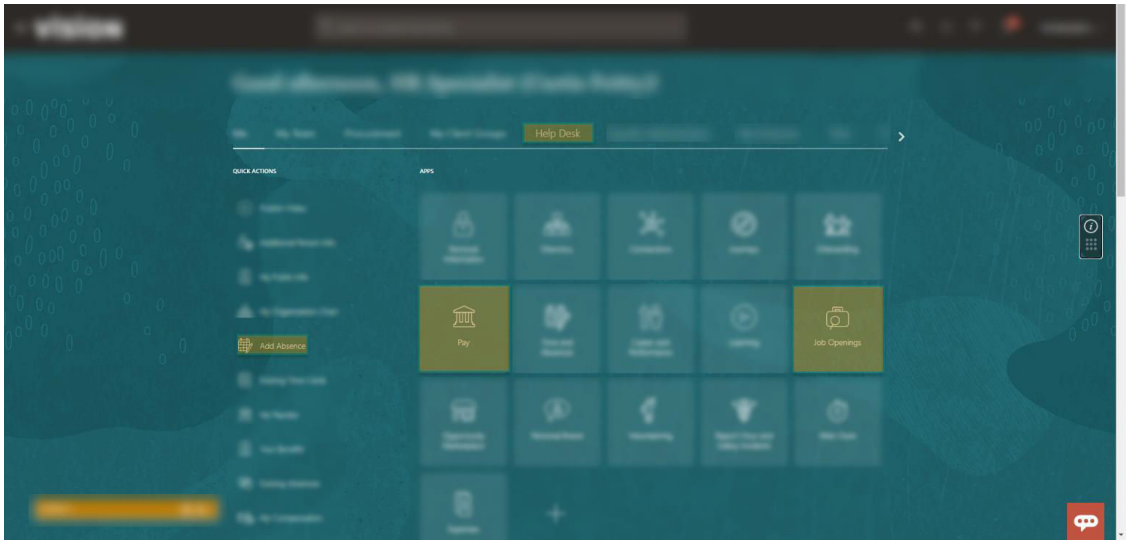

Creating a Launcher

1. On the OGL console homepage, select **Launcher**.

   The **New Content** modal dialog is now displayed.

2. Enter the **Display Name** and the **Location URL**.

> **Note**
>
> The following characters are not allowed: **/ \ | : " < > ?**

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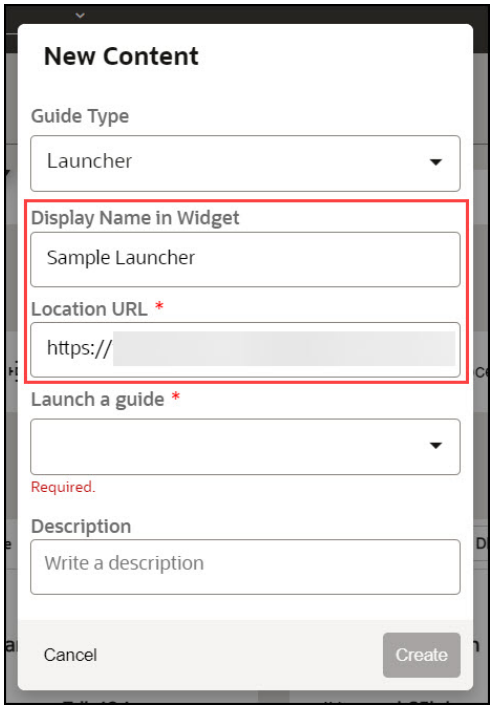
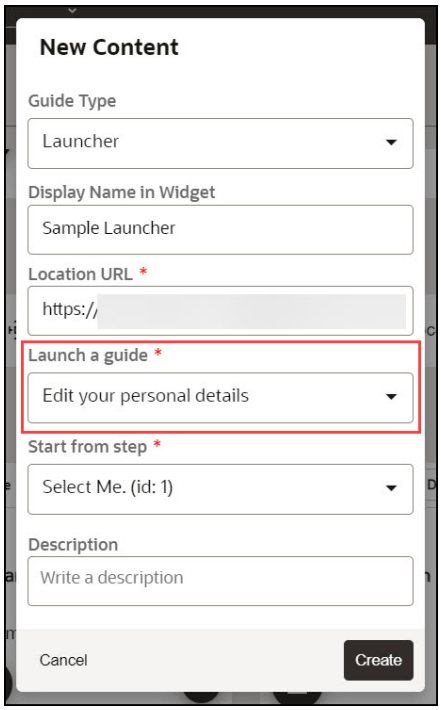


3. Use the **Launch a Guide** dropdown to choose the guide to launch.



4. Use the **Start from step** dropdown to choose the step to launch.

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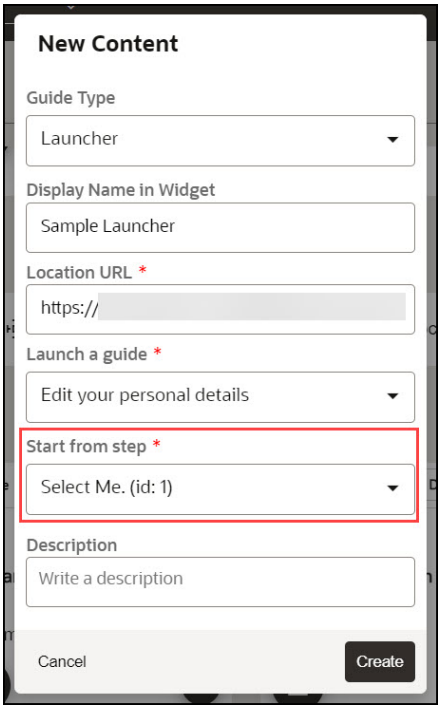
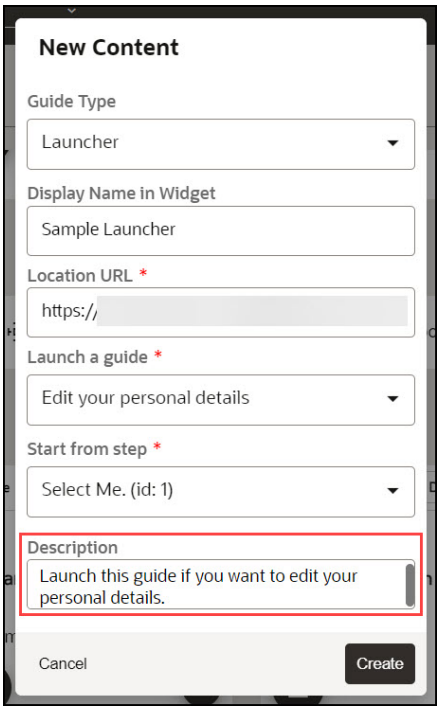


5. Enter a description for the launcher.



6. Select the **Create** button (Create) to launch the OGL Editor.
The OGL Editor launches in a new tab, where you can start capturing the contents of the guide.

7. Click the **Select an Element** on the application.

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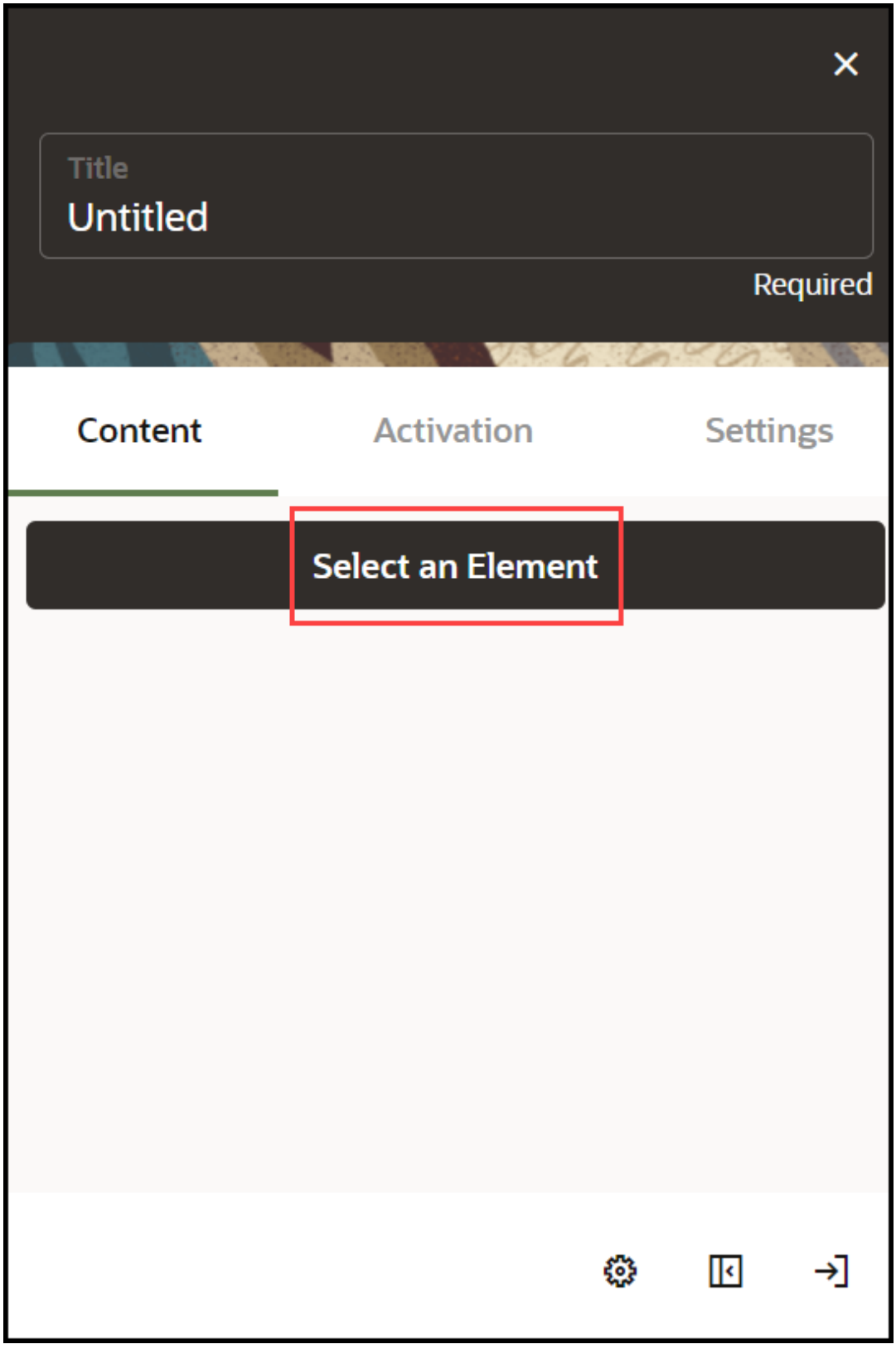

8. Select the target element on the application.

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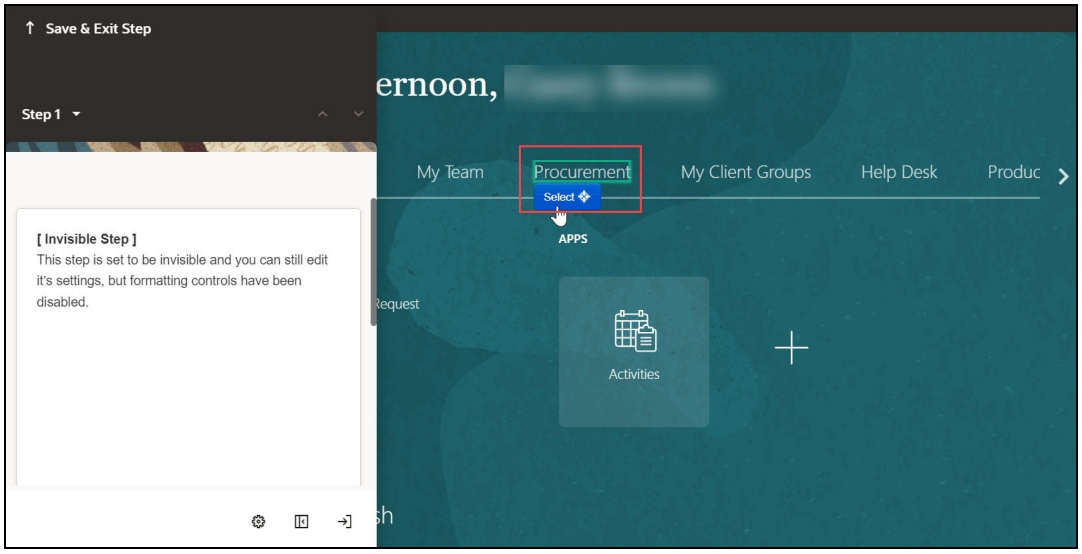

9. Go to **Step Settings**.
10. Set the desired **Activation Settings** and **Advanced Settings**.
11. Select **Save & Close**.
12. Go to the OGL console homepage and activate the **Launcher**.

> **Note**
>
> Remember to set your activation conditions, refer to Enabling Guide Activation Settings section.

Creating a Hotspot

What is a Hotspot?

A Hotspot is a type of "event listener" that allows you to gather critical information on how your users interact with and use your application. In principle, Hotspots are a variation of Launchers; while Launchers listen for an event, and when that event occurs (i.e., a click of a button), OGL launches an item. Hotspots listen for an event, and when that event occurs, OGL registers that event in analytics. Use this feature to set up hotspots around your application to gain insight into how users navigate or monitor key differences between starting a process and not submitting it.

The image illustrates what the invisible Hotspots would look like on the application and the analytics dashboard after a month of use.

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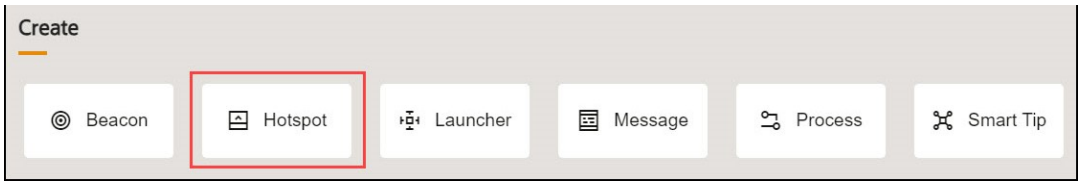
Creating a Hotspot

To create a Hotspot:

1. On the OGL console homepage, select **Hotspot**.

> **Note**
>
> You can also select the **Create+** (Create +) button from the My Content page and select the Hotspot type.



The **New Content** modal dialog is now displayed. Select **Hotspot** from the Type dropdown menu, if needed.

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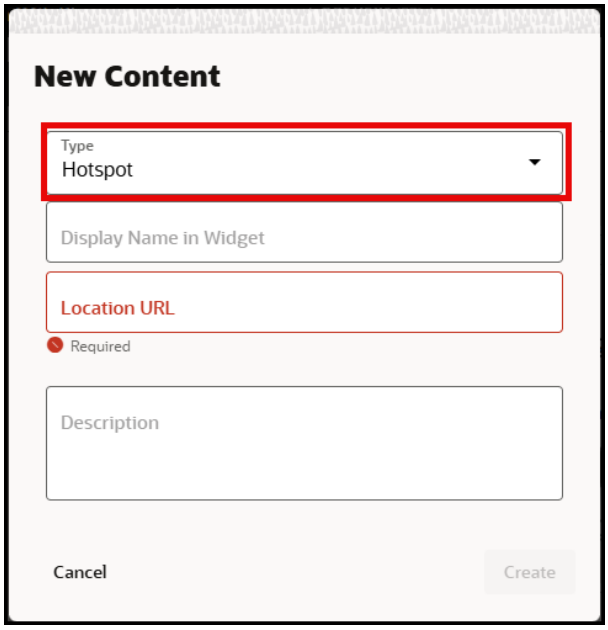
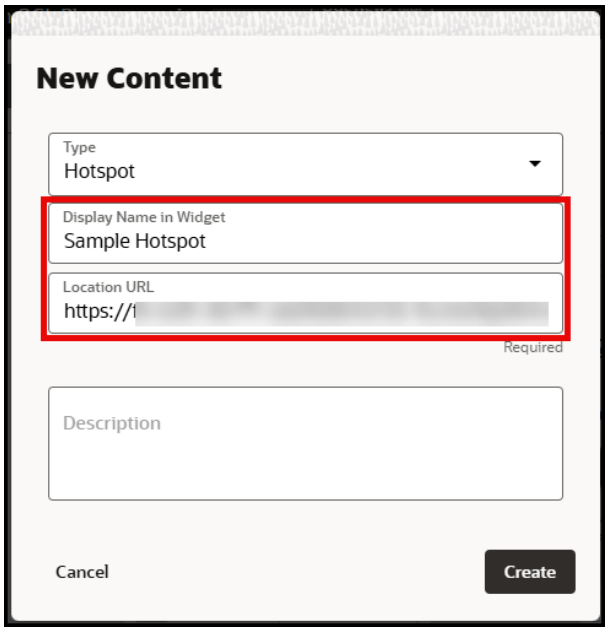


2. Enter the **Display Name** and the **Location URL**.

> **Note**
>
> The following characters are not allowed: **/ \ | : " < > ?**



3. Enter the Description for the Hotspot, as needed.

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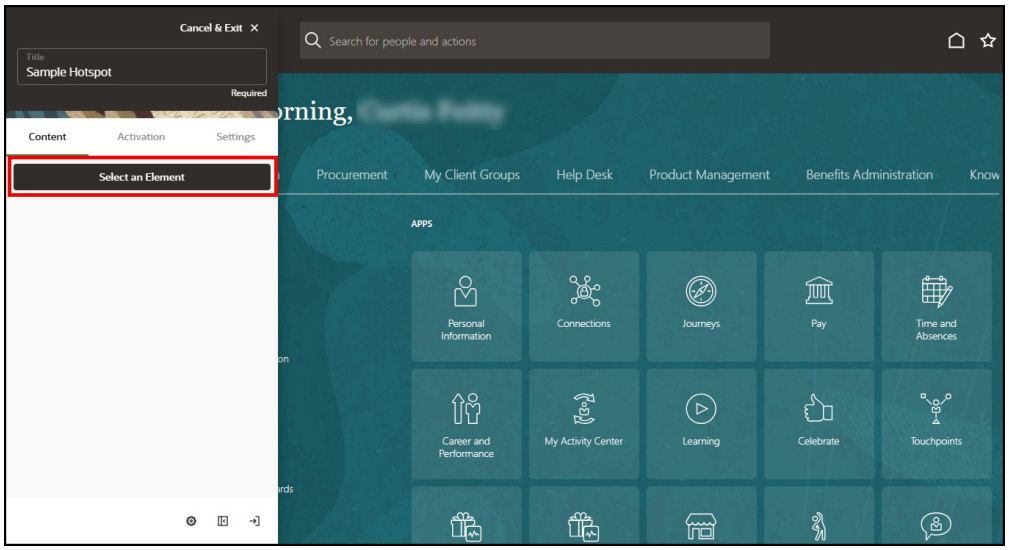
4. Select the **Create** button (Create) to launch the OGL Editor.

   The OGL Editor launches in a new tab on your host application.

5. In the OGL Editor, select **Select and Element** button.



6. Move your mouse about the page and select an element where you want to place the Hotspot, then select the **Select** (Select) button..

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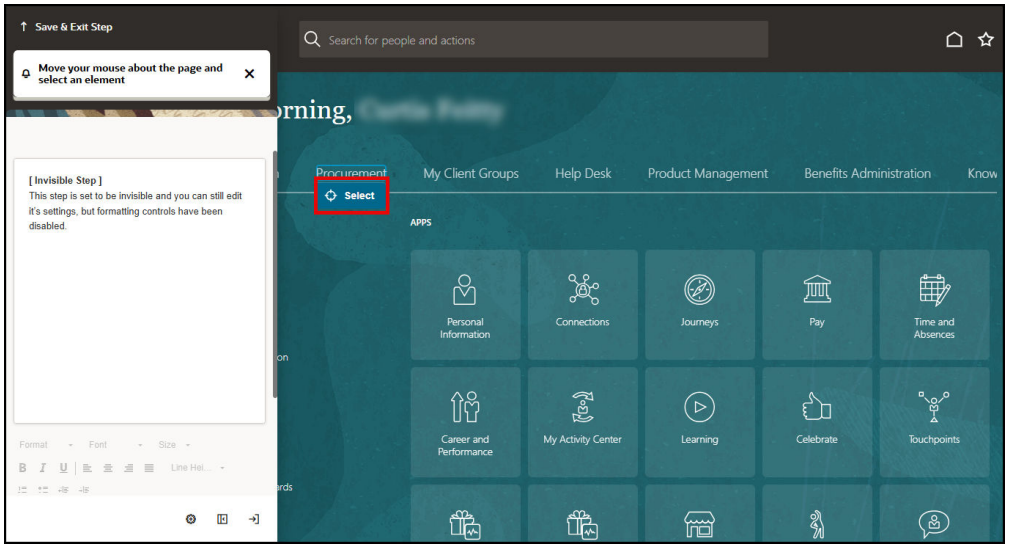
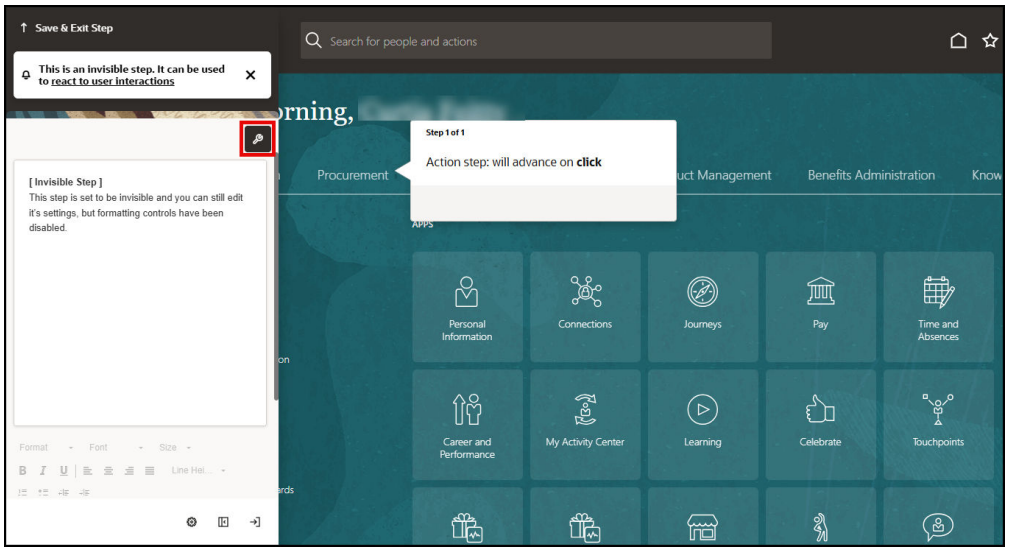


7. A tool tip will appear to indicate the selected target element.

> **Note**
>
> This tool tip will not display for the end user.

8. Select the **Step Settings** ( ) button top open the Step Settings panel in the OGL Editor.



9. Set the desired **Activation Settings** and **Advanced Settings**.

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Note

In the **Advance when:** setting, choose the user action that you wish to be counted when the user interacts with the selected element. For example, if you want the Hotspot to count the **number of times the element is clicked**, then select '**User presses mouse button'** instead of **'User clicks element'.**

When a user clicks an element, there are two distinct events that can be counted:

- **User presses mouse button** (i.e., "mousedown") : Records the event as soon as the mouse button is pressed down.
- **User clicks element** (i.e., "click") : Records the event after the mouse button is pressed and then released on the same element.

Key Differences:

- 'mousedown' = happens **before** the full click is completed. Use 'mousedown' for immediate response.
- 'click' = requires both **press** and **release** on the same target. Use 'click' for actions that confirm a full click.

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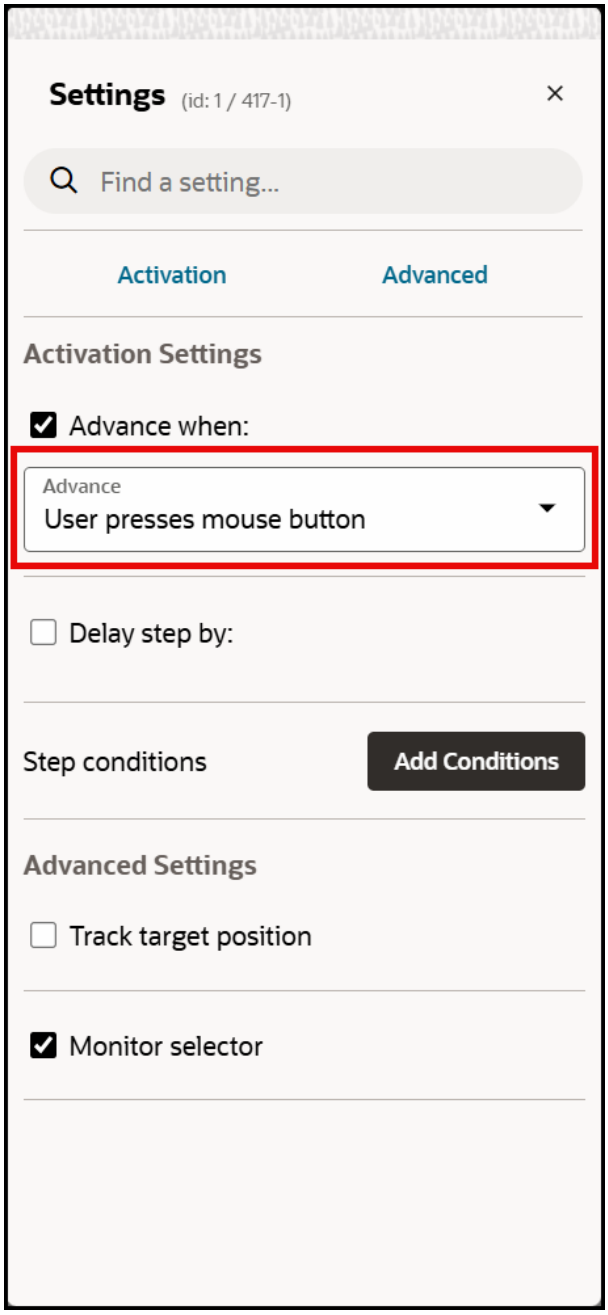
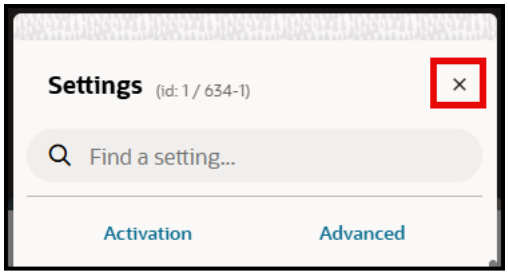


10. Select the **Close** button to close the Settings panel when finished.



11. Select **Save & Exit** Step to return to the OGL Editor main panel.

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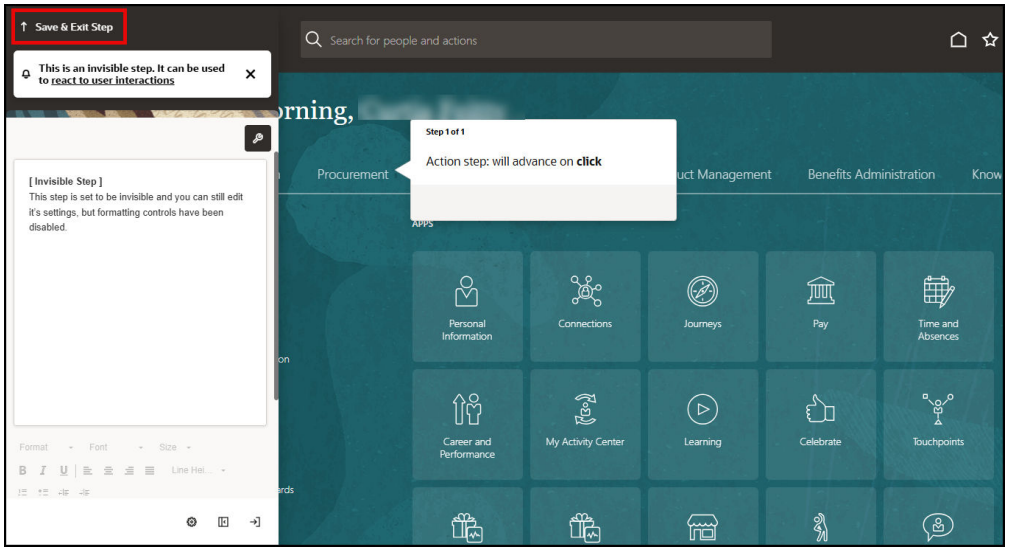
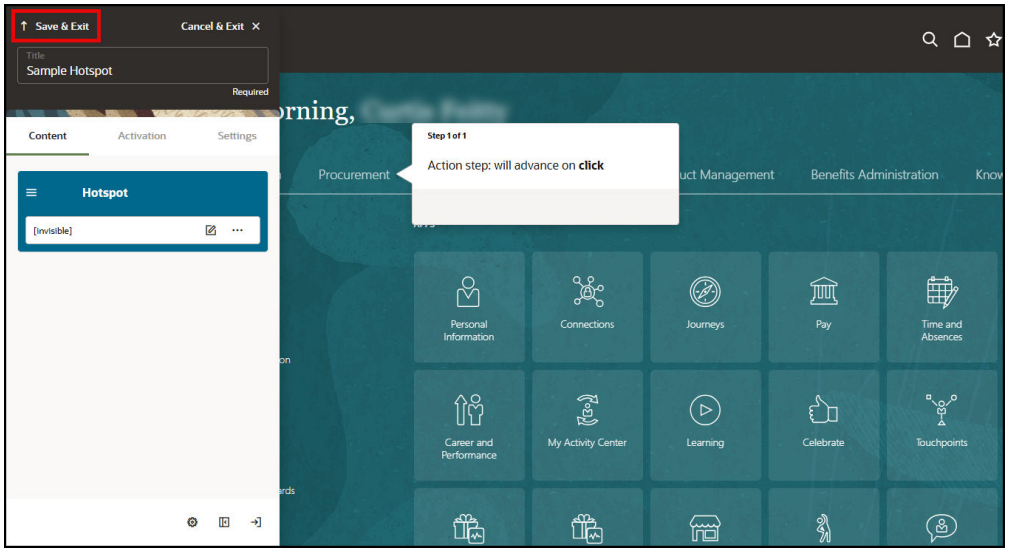
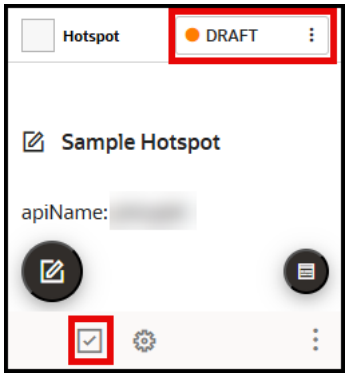


12. Select **Save & Exit** when finished.



13. From the OGL console, be sure to activate the **Hotspot**. Configure Guide Activation settings for this Hotspot, as needed, by selecting **Guide Activation** in the guide tile and **Publish** the guide when you ready to deploy the Hotspot.



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> **Note**
>
> Remember to set your activation conditions, refer to the Enabling Guide Activation Settings section.

Creating a Survey

Surveys and Survey Analytics

Surveys allow you to create and deploy targeted, customizable, interactive surveys and polls to collect application user feedback and insights almost anywhere in the host application.

Surveys can be created with the following response types:

- **Multiple Choice** - Up to 5 answer choices allowing multiple answer selections
- **Single Select** - Up to 5 answer choices allowing only 1 answer selection
- **True or False** - Binary answer choice with customizable answers
- **Rating Scale** - Customizable numeric scale ranging from 1 to 10
- **Experience Rating** - Preset 3-option rating
- **Question** - Free text field for responses up to 1,000 characters maximum

Key Features of the Survey

FEATURE DESCRIPTION	ROLE	ADDITIONAL INFORMATION
Surveys	• Administrator • Developer	• Allows OGL administrators and developers to create and deploy targeted, customizable, interactive surveys and polls to collect application user feedback and insights. • Can be deployed almost anywhere in the application. • **Survey Translations** allows survey guides to support multi-language translation and are included in the translation export file for guide translation.

Creating and Publishing the Survey

To create a Survey:

1. On the OGL homepage, select **Survey**.

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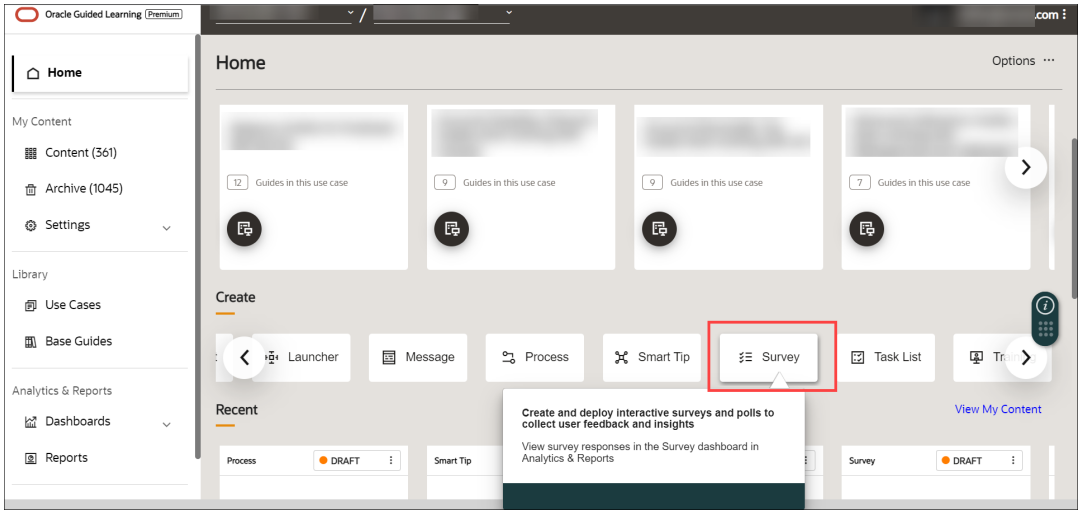
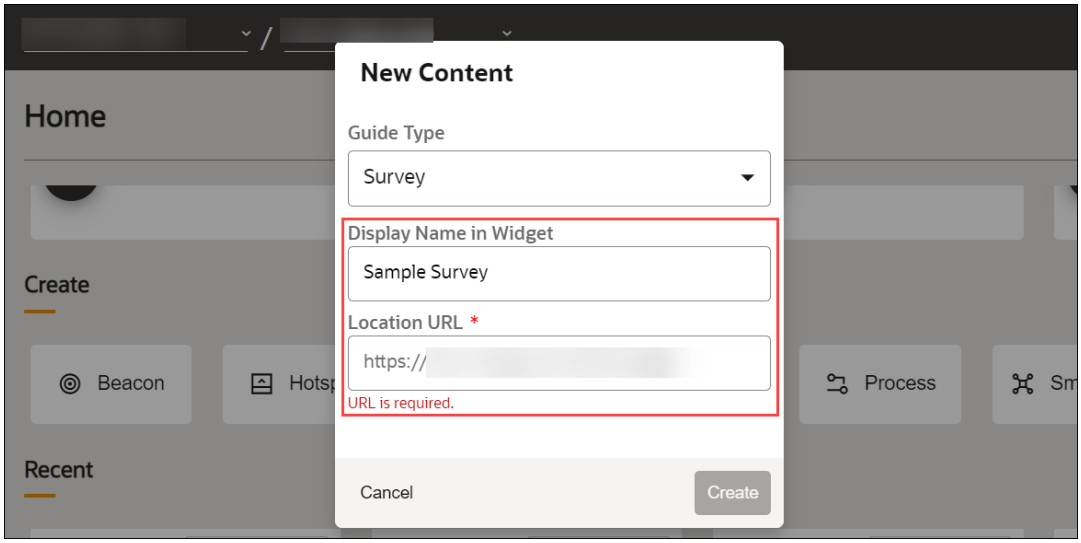


2. Enter the desired **Survey** name and the **Location URL**.



3. Select **Create**.
The **Survey** editor is displayed.

> **Note**
>
> The **Survey** editor opens in a new tab. The editor appears as an overlay on your application.

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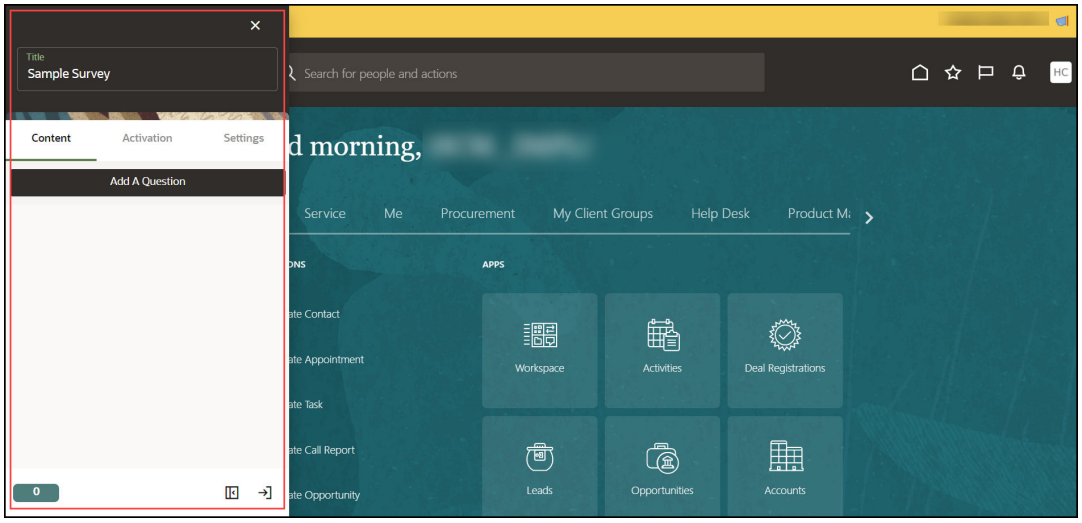
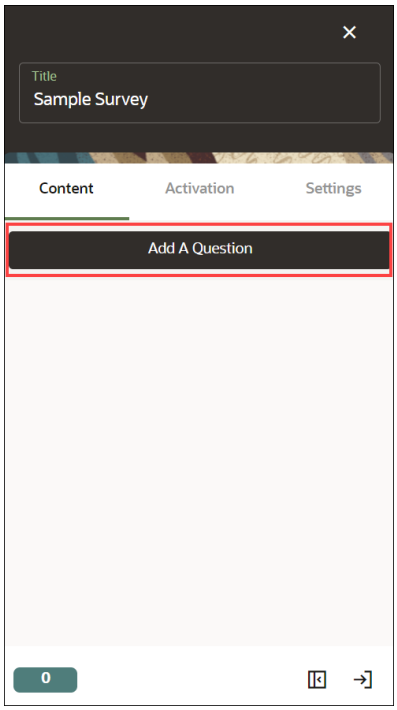


4. Select **Add A Question**.

> **Tip**
>
> To include more questions in your survey, select **Add A Question** again to add another one. You can have multiple questions in a single Survey.



The Survey template appears. You can see the changes you make through the real-time preview.

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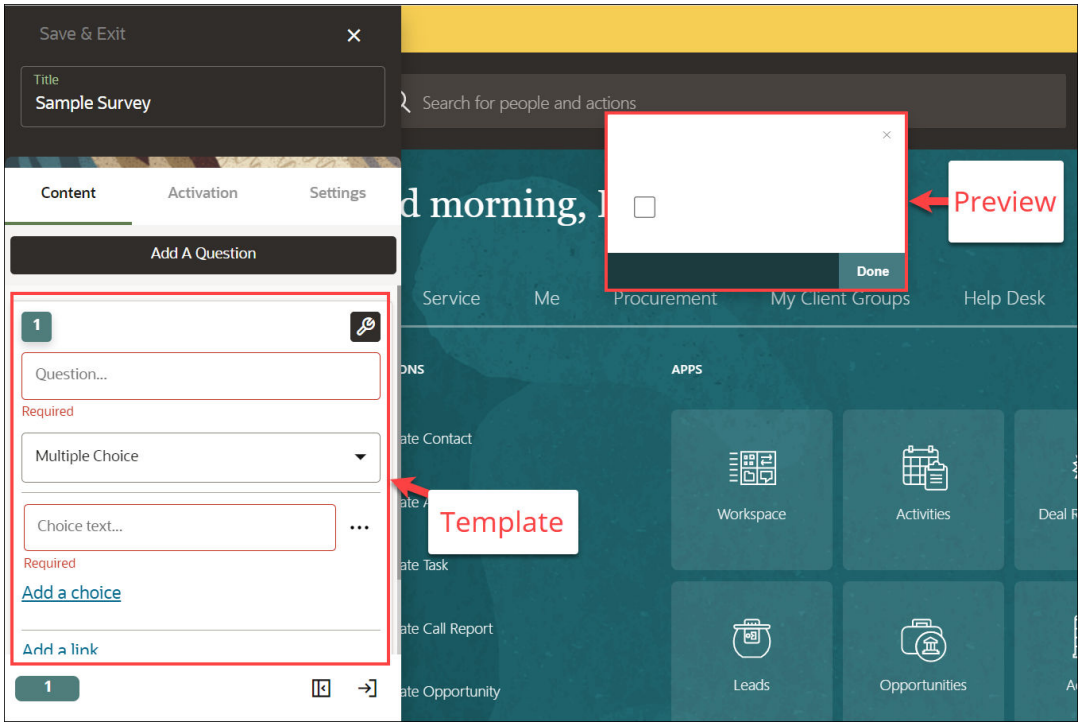
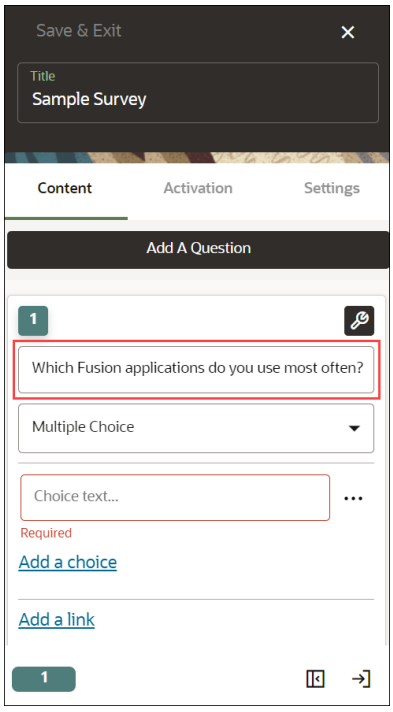


5. Enter the question.



6. Select the Survey type from the dropdown menu.
(In this example, we have chosen **Multiple Choice** for the demo.)

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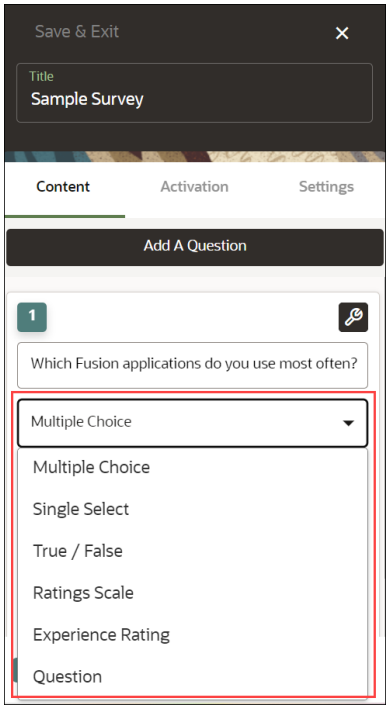
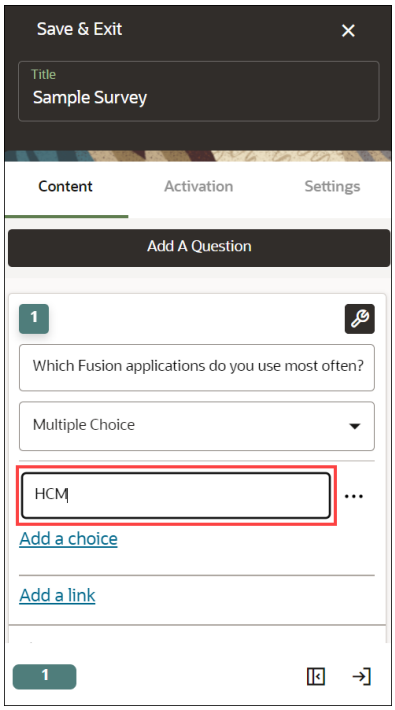


7. Enter the **Choice text**(s).



Select **Add a choice** to add multiple choice.

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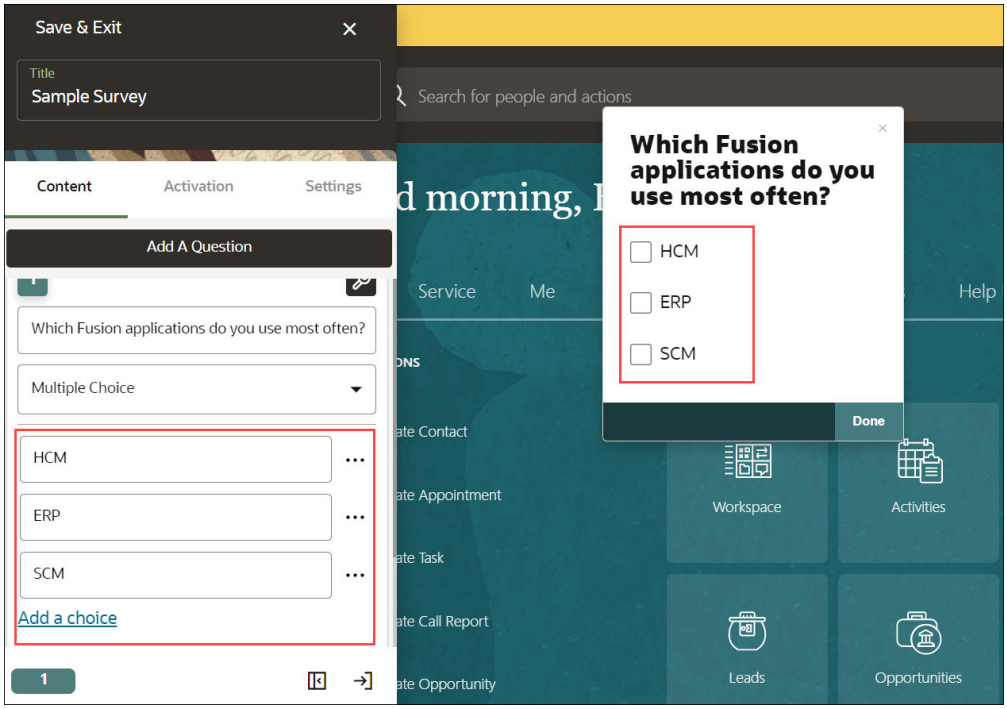
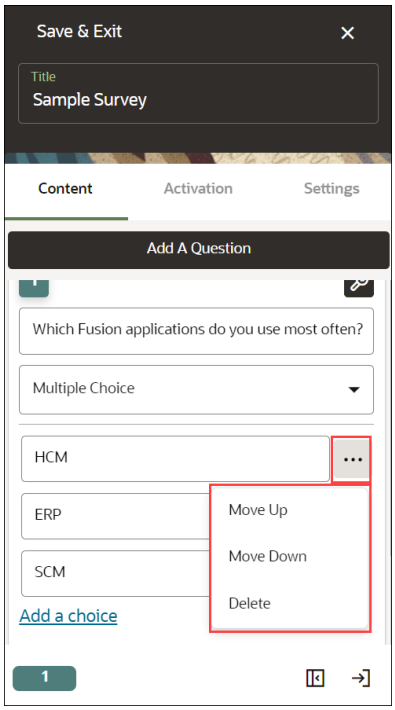


Use the ellipsis icon to explore the choice's menu. You can **Move Up**, **Move Down** or **Delete** the choices.



8. Select **Add a link**,ifyou want to point out to any target page (Optional).

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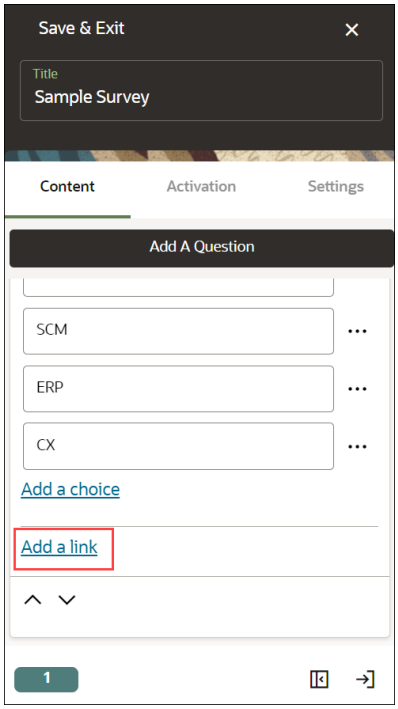
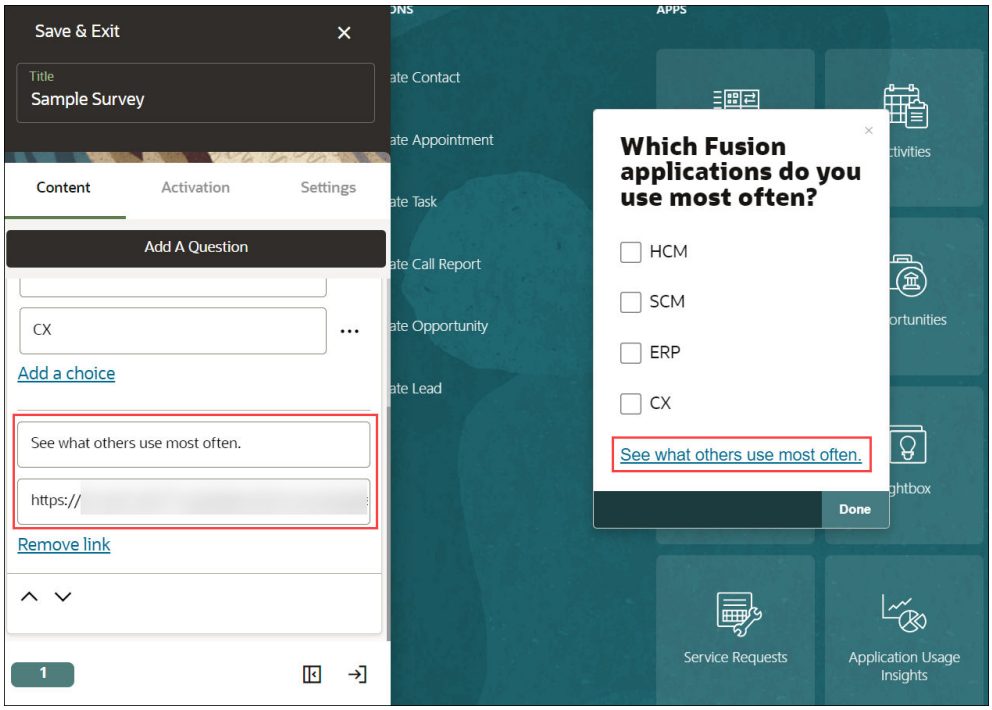


Enter the display name of the link and the link URL.



9. For additional settings, select the **Settings** icon ( )

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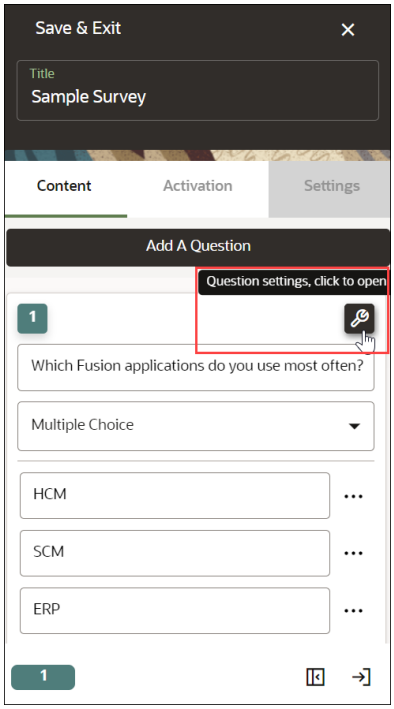
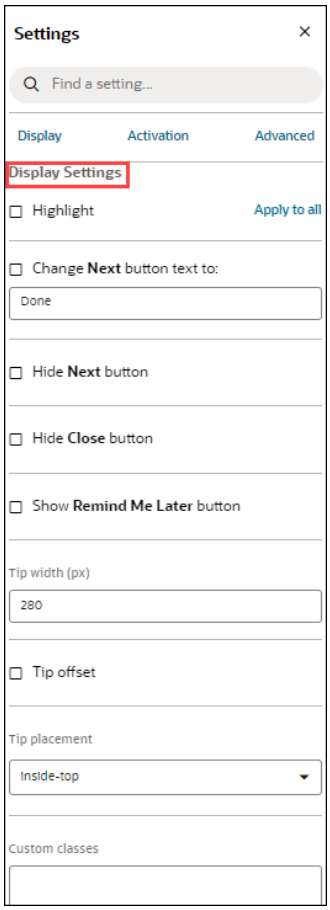


The **Settings** modal window appears.

10. **Display Settings**



a. Check the **Highlight** option to highlight the Survey modal window.

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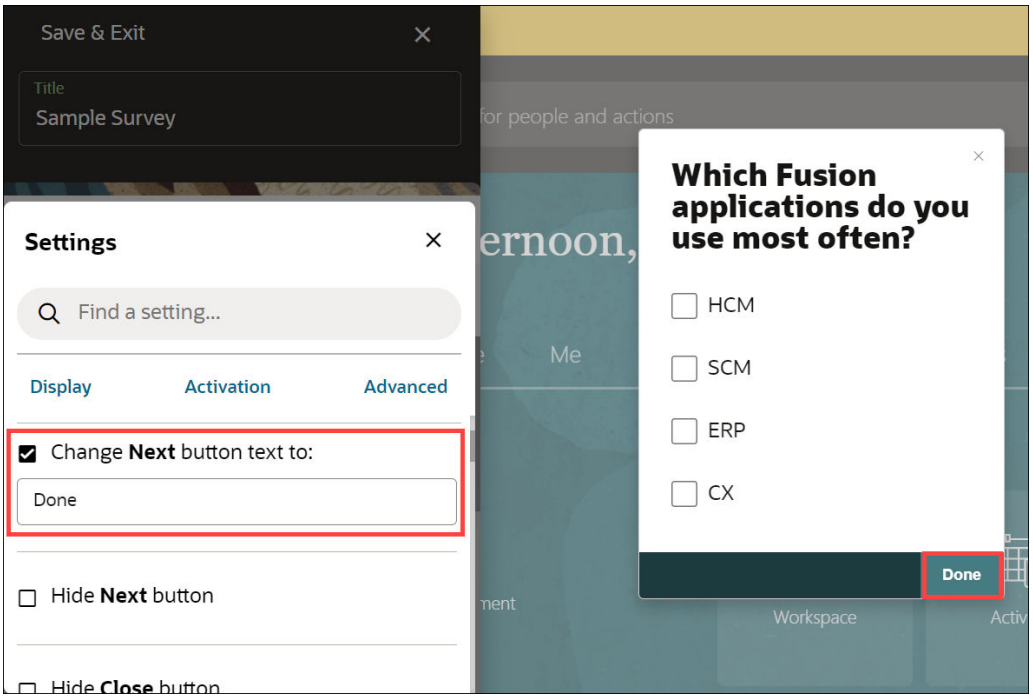
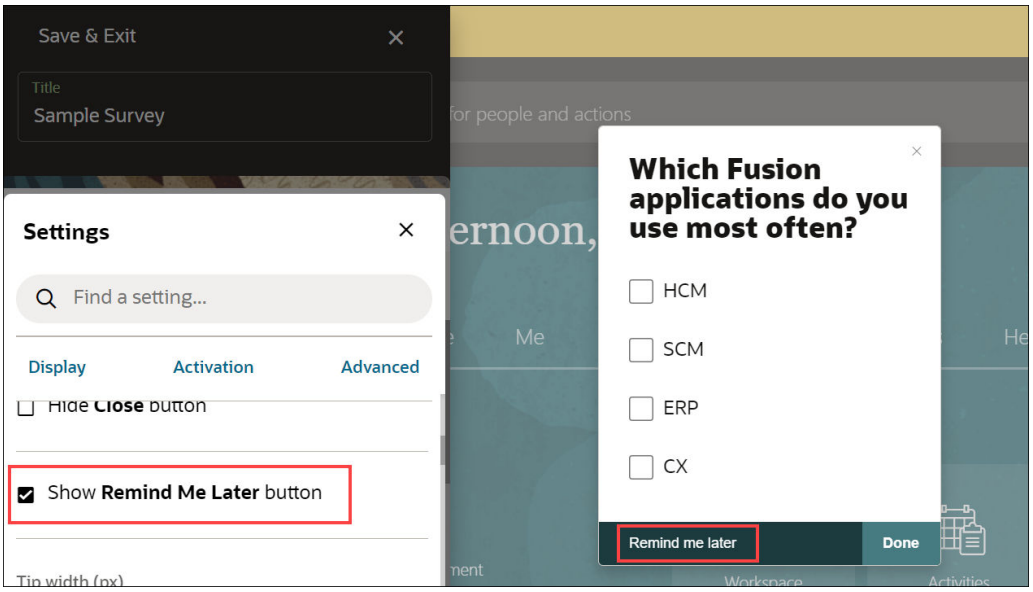
b. Check the "**Change Next button text to"** option to give an alternative text instead of the default text "**Next**".



c. Check the "**Hide Next button"** to hide the Next/Done button.

d. Check the "**Hide Close button"** to hide the close button.

e. Check the "**Show Remind Me Later button"** to show the reminder option in the Survey window.



f. Configure **Tip width** and **Tip offset**.

g. Select the desired **Tip placement**.

11. **Activation Settings**
Select the **Activation Settings** tab to view the activation settings.

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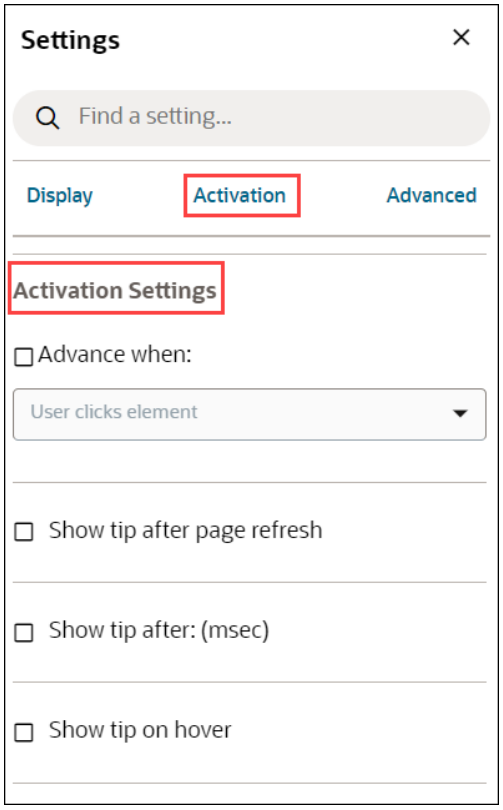
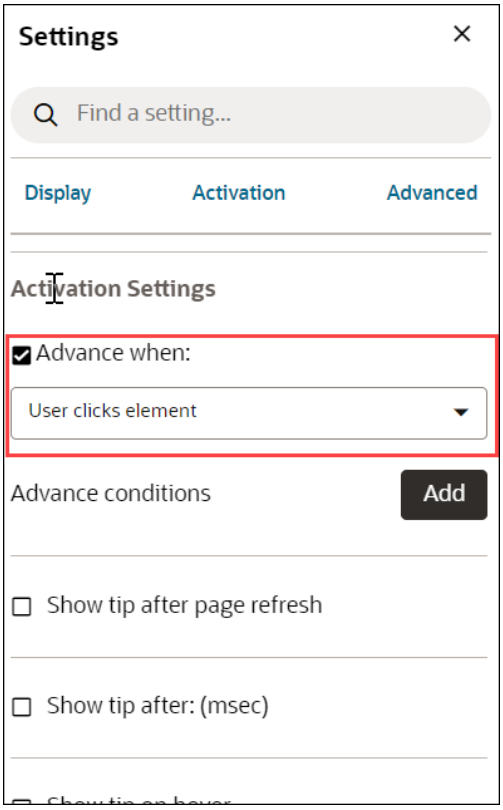


a. Check the "**Advance when"** option to decide when the Survey will appear. Then, you can select the action that triggers the Survey from the dropdown menu.



b. Check "**Show tip after page refresh**" to prevent tip flashing.

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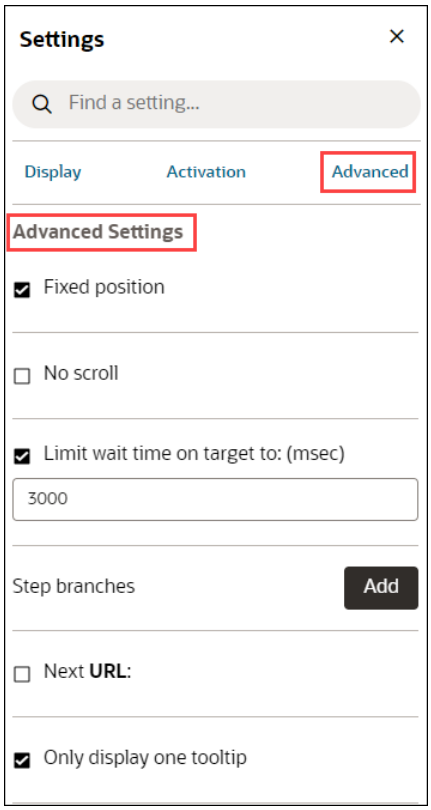
c. Check "**Show tip after: (msec)**" to delay the appearance of the current tip.

d. Check "**Show tip on hover**" to show the tip when the user moves their mouse over the target element, help icon, or beacon.

12. **Advanced Settings**
Select the **Advanced Settings** tab to view the Advanced settings.



a. Check **"Fixed position"** to keep the tip visible even if the user scrolls up or down the page.

b. Check "**No scroll**" to disable the scrolling of the page.

c. Check "**Limit wait time on target to: (msec)**" to send an error message if the current target element does not appear within "x" ms so that we can notify you and fix the problem.

d. Select **Add** button to add **Step Branches**.

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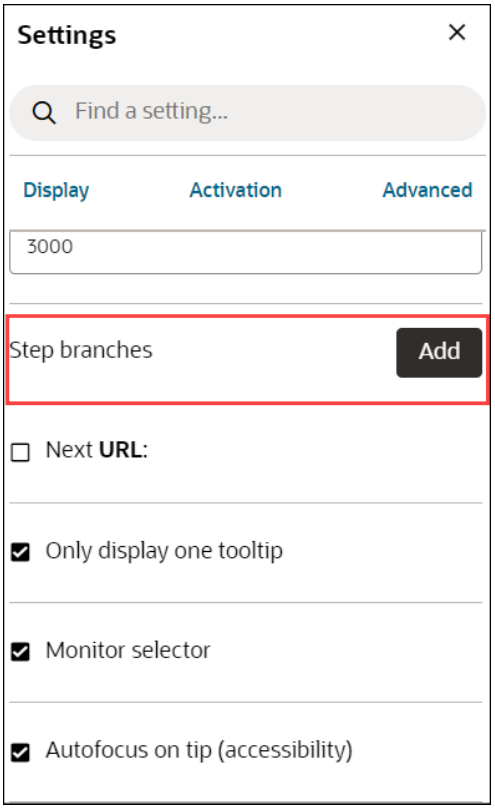

e. Check "**Next URL:**" to enable navigation to a new page when selecting the **Next** button.

f. Check "**Only display one tooltip**" to avoid displaying duplicate tips.

13. Select the **Close** icon to close the settings window.

14. Select **Save & Exit**.

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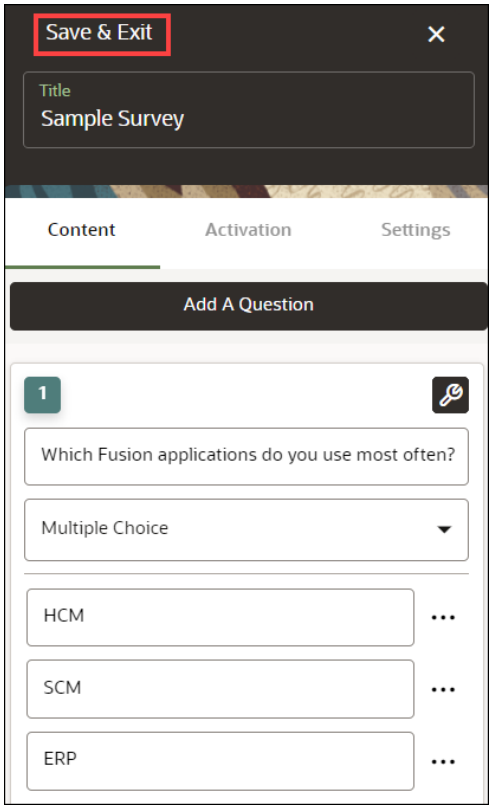
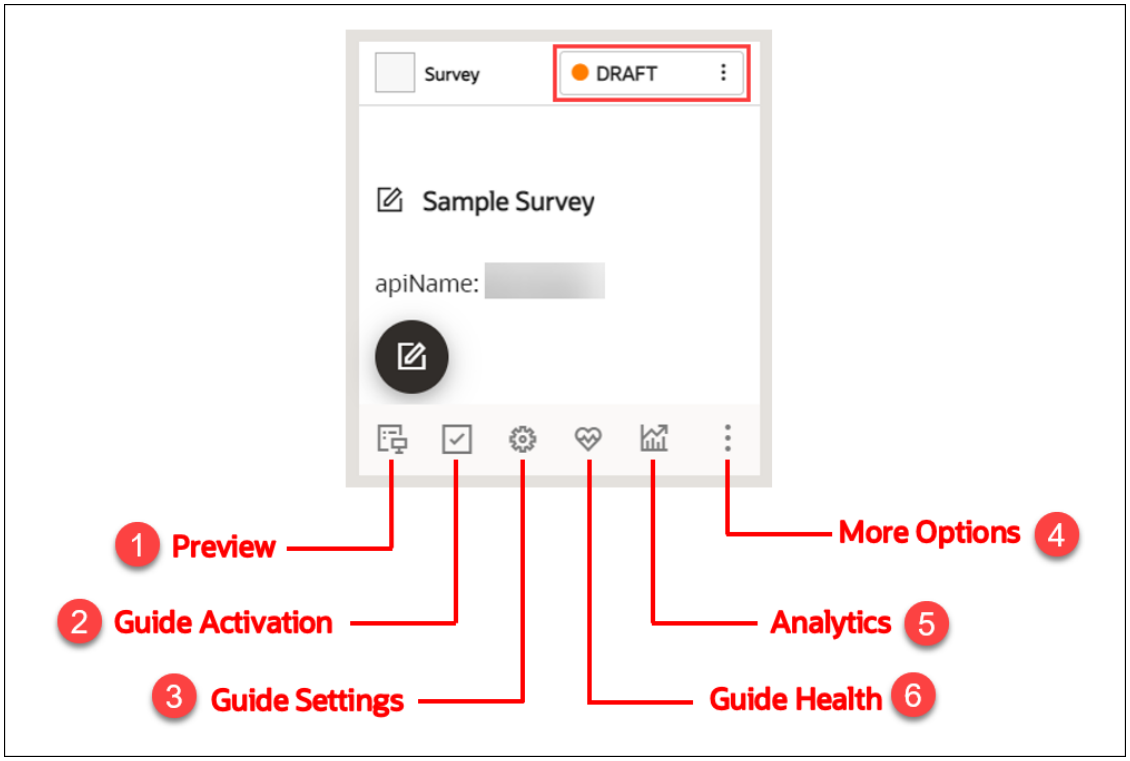


A new Survey has been created and can now be viewed on the homepage. The survey is currently in **Draft** status.

After creating the Survey:



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1. Select the **Preview** icon to preview the Survey.
2. Select the **Guide Activation** icon to set the activation conditions.

Learn more about Guide Activation.

3. Select the **Guide Settings** icon to manage settings.

Learn more about Guide Settings.

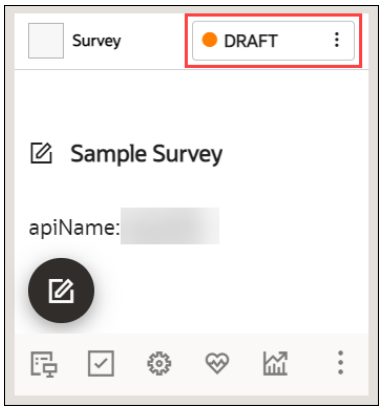
4. Select the **More Options** icon to **Delete/Clone** the Survey.

Deleting / Cloning Guides.

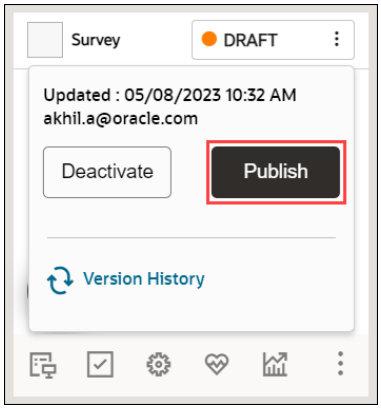
5. Select the **Analytics** icon to view the statistics of your Survey.
6. Select the **Guide Health** icon to view the history of errors reported to your Survey.

To publish the survey:

1. On the homepage, select **Content**.
2. Select the status button on the Survey that you want to publish.



Now select **Publish**.



3. Add comments (optional) and select **Publish**.

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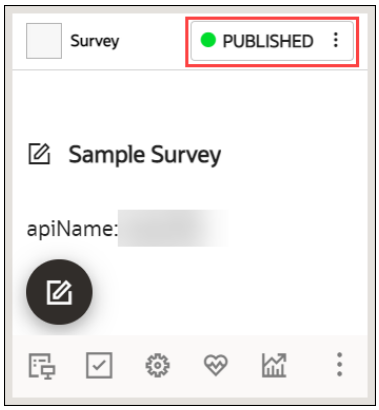
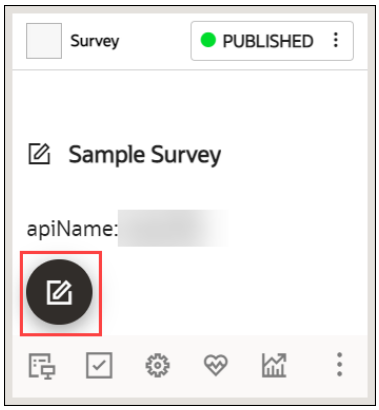
Your Survey is now published, and the status is set to "**PUBLISHED**".



Editing the Published Survey and Republishing

You can always make changes to the surveys you published.

1. Select the **Editor** icon on the Survey to make changes.



2. **Publish** the Survey.
   Each republish creates a new Survey version, with easy access to version history. In addition, you can restore to an older version of the Survey if you wish.
3. Select the status button to view the version history.

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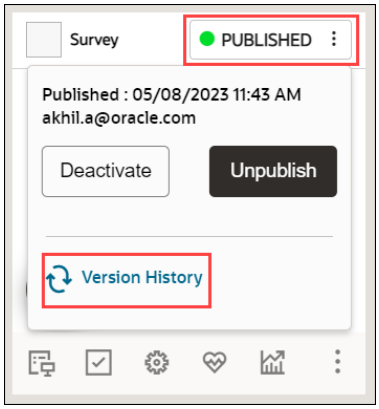

The revision history is now displayed.

4. Select the **Restore** button, if you wish to restore to an older version.

Survey Analytics

Survey Analytics are used to process, store, and visualize survey data. This adds another tool in OGL's "insight to action" toolchest supporting content management, product management, and analytics. OGL console users with **View Analytics** security permissions can generate a downloadable report from the Survey Analytics dashboard that will be emailed to them.

Key Features of the Survey Analytics

FEATURE DESCRIPTION	ROLE	ADDITIONAL INFORMATION
Survey Analytics	• Administrator • Developer	• The Survey Analytics tool accompanies every survey content type. • Adds capabilities to process, store, and visualize survey data. • Adds another tool in OGL's "insight to action" toolchest supporting content management, product management, and analytics. • The Survey content types now allow OGL administrators to download a report from within the Survey analytics dashboard containing end-user responses and results collected by surveys.

View the Survey Analytics

To view the Survey Analytics:

1. On the main navigation menu, select **Dashboards** > **Surveys**.

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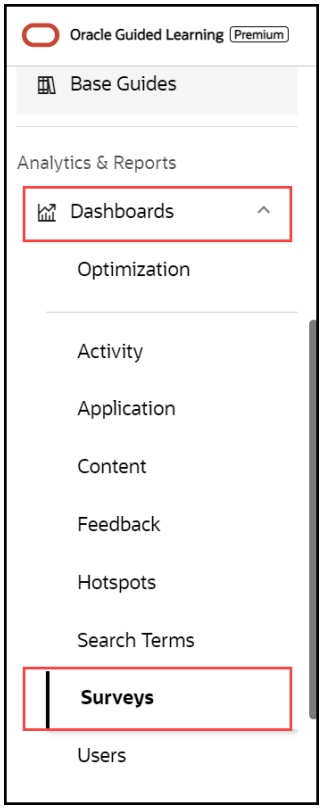
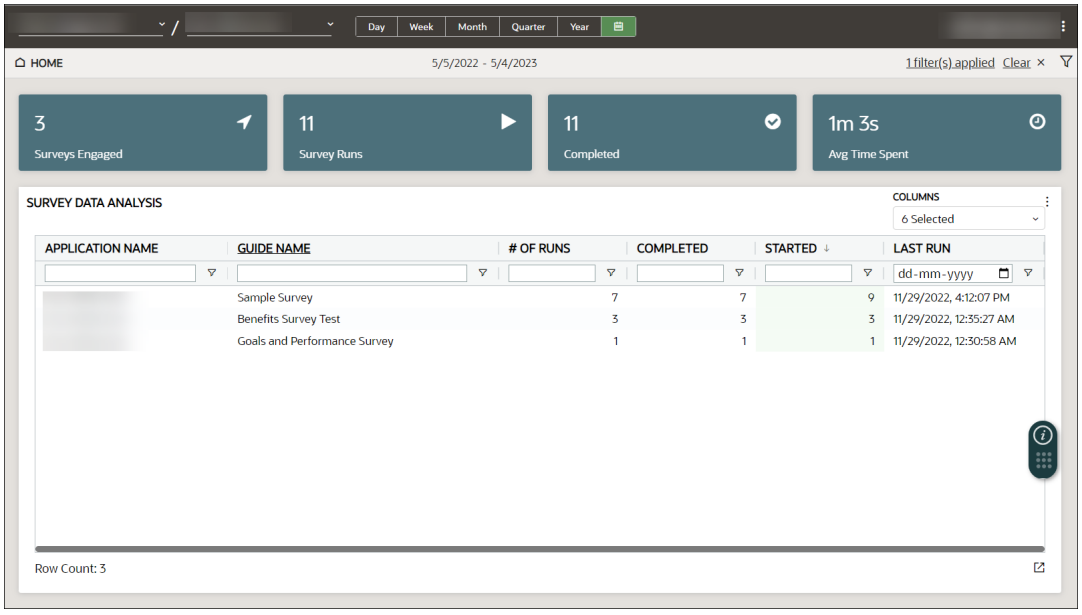


The **Survey** analytics dashboard is displayed. You can see the statistics like the **Number of Runs**, surveys **Started** and **Completed**, and the **Last Run** date.



2. Select the time frame for which you would like to view the analytics data. You can also select a custom date(s).

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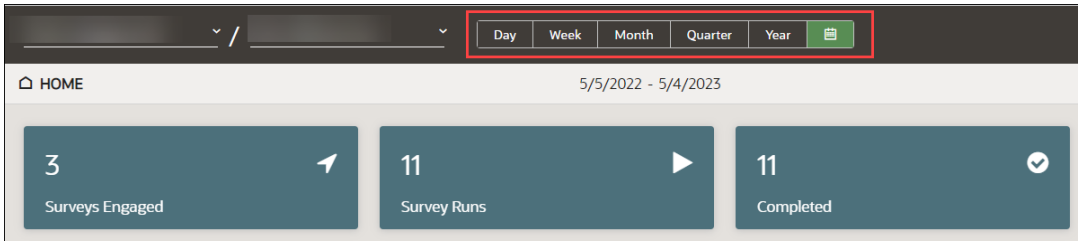
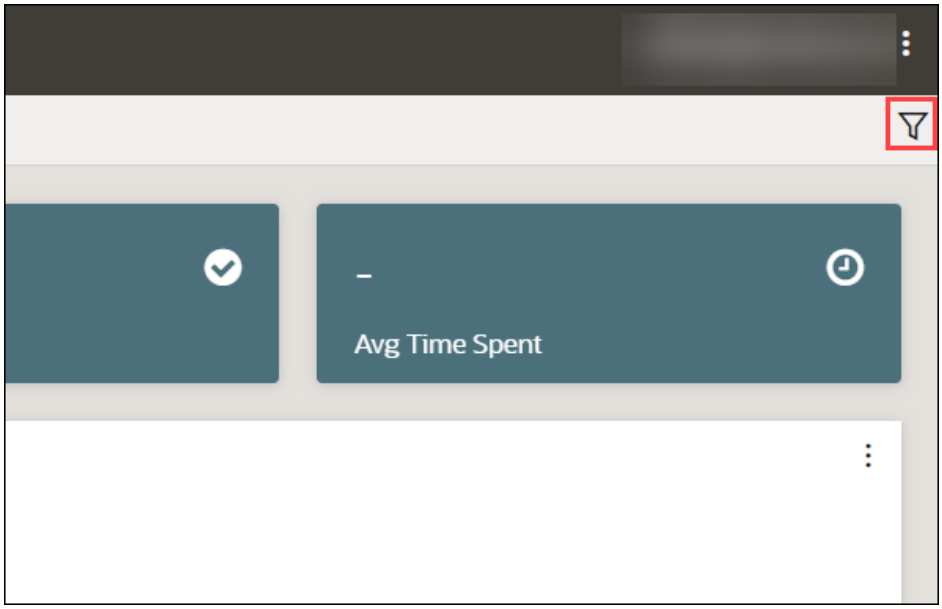


3. Select the **Filter** icon ( ) to filter the analytics data.



Generate a Survey Analytics Report

> **Note**
>
> The procedure below will run a report that will be sent to the email address in your OGL user profile. To update or verify your email address, select your username in the top-right corner of the OGL console and select My Profile.

To generate and receive a Survey analytics report via email:

1. On the main navigation menu, select **Dashboards** in the **Analytics & Reports** section, then select **Surveys.**

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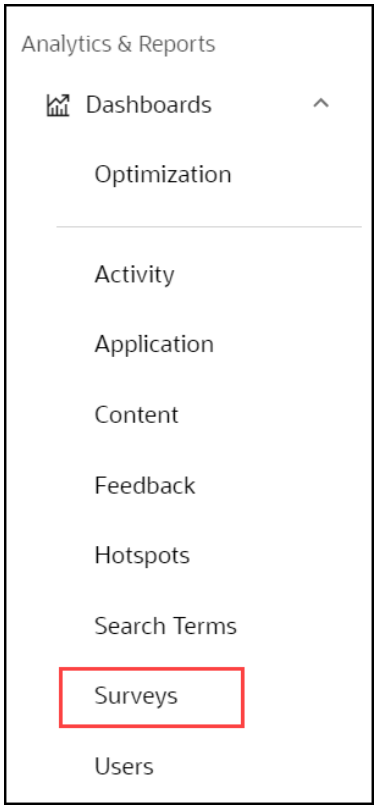
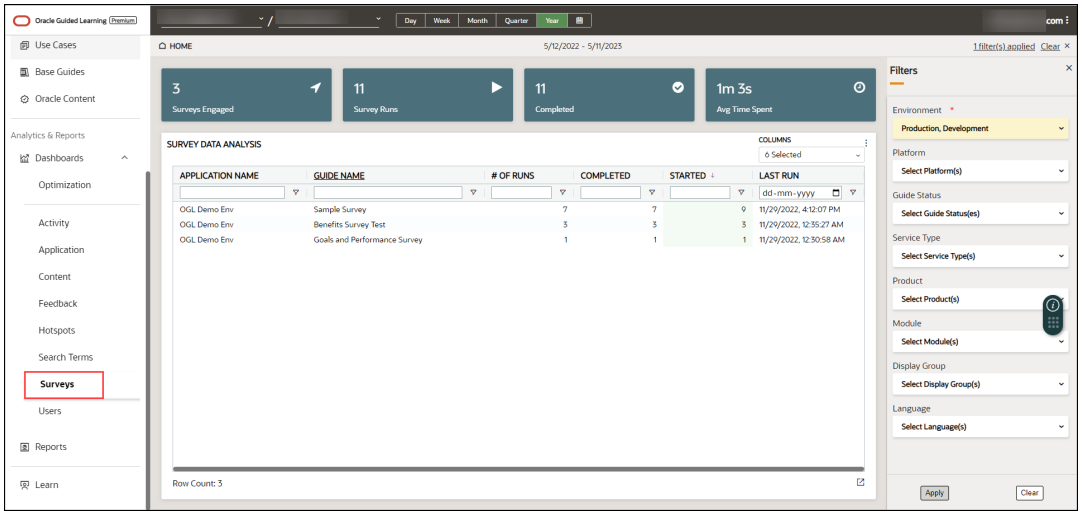


The **Survey Analytics** dashboard is now displayed.



The **Filters** slider window is displayed on the right side of the Reports screen. Apply filters, as needed.

2. Select the Survey guide for which to generate the report.

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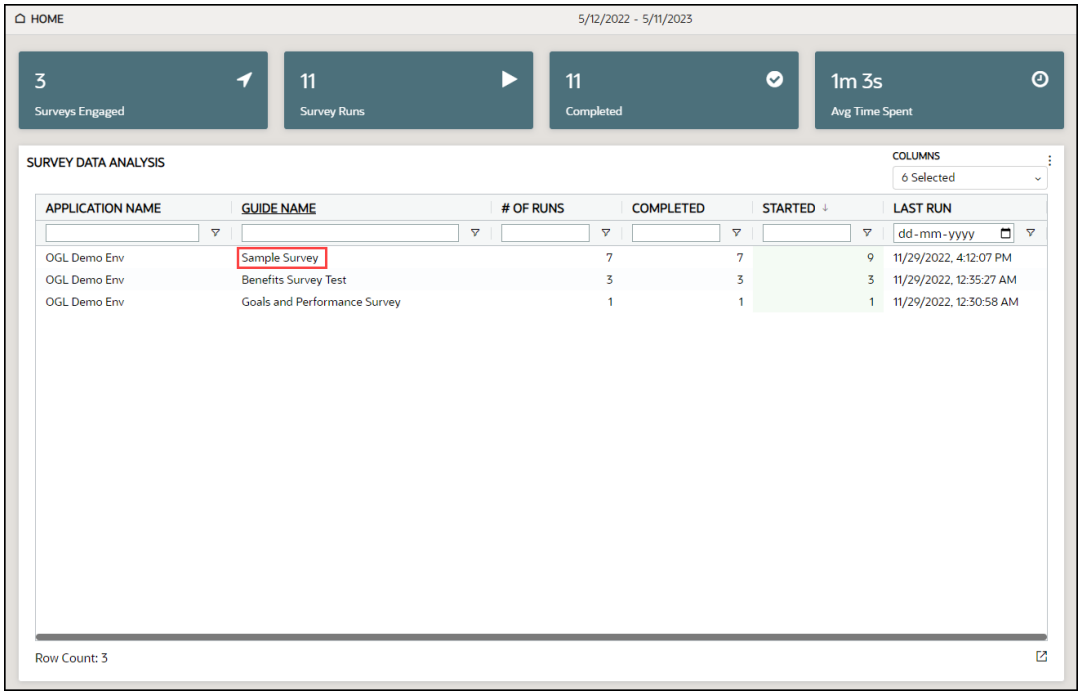
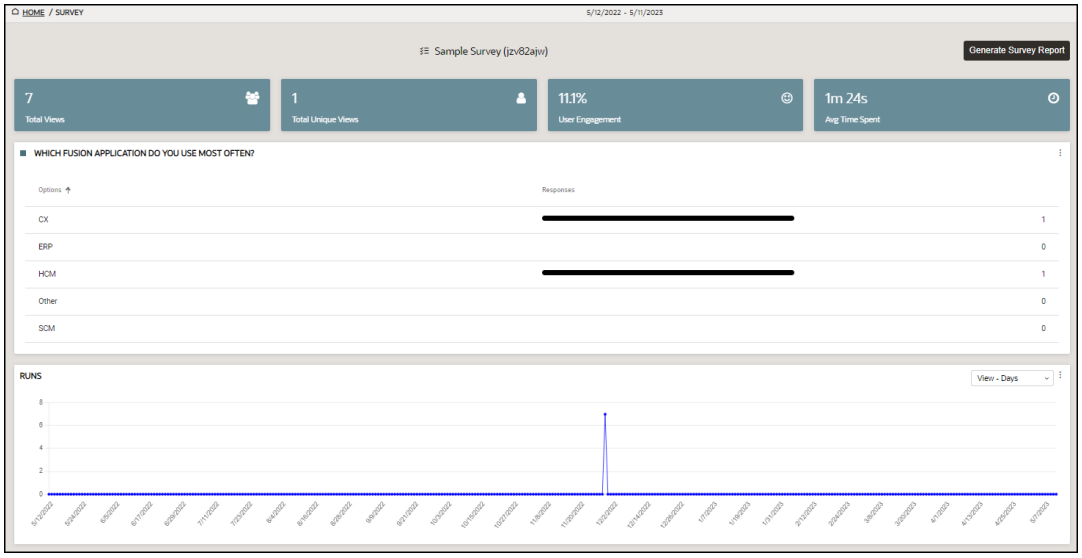
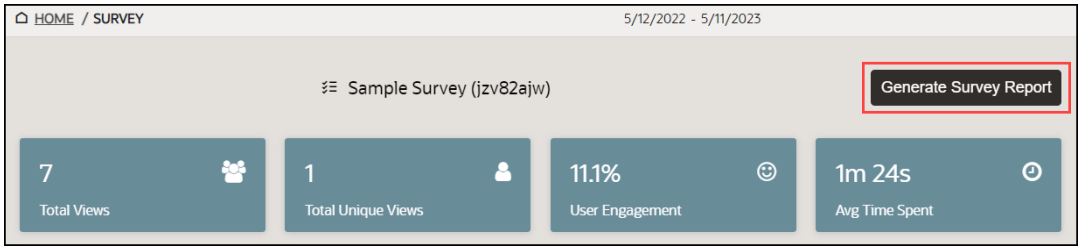


A dashboard of the selected Survey guide is displayed.



3. Select the **Generate Survey Report** button.



4. The following message will appear in the banner to alert you that your report is being processed and will be sent to you via email when ready.

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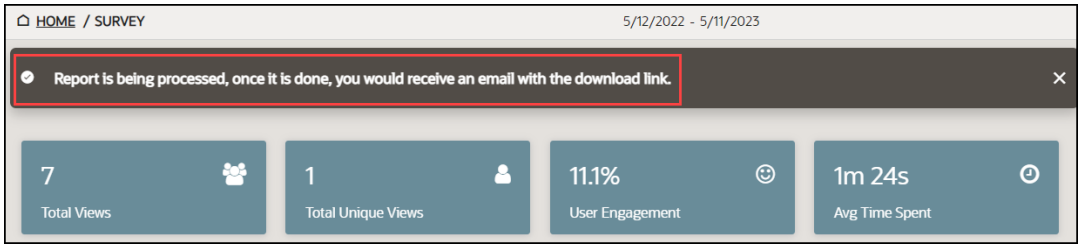
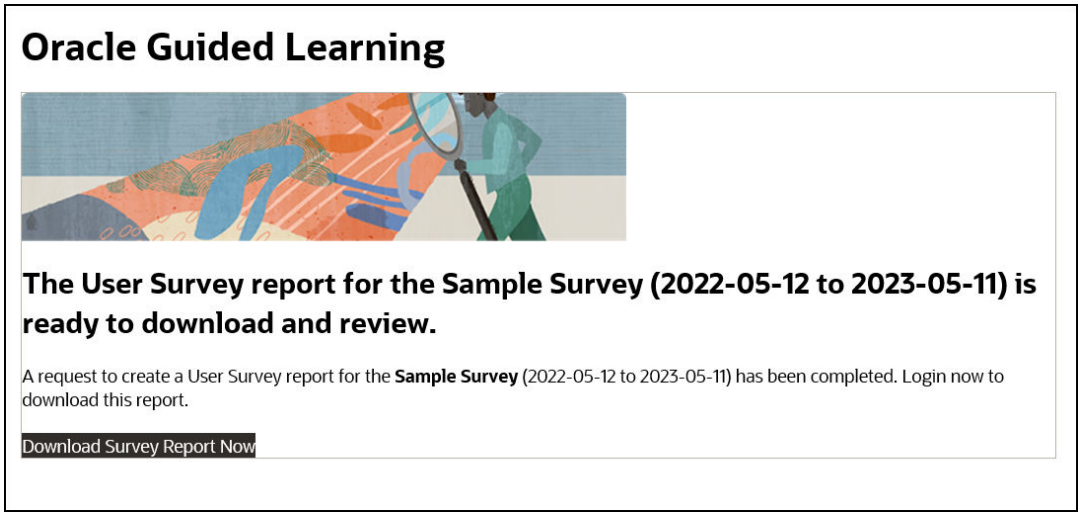


5. Go to your email inbox and check for the new mail with subject "**OGL Survey Report**". The email should look like this.



6. Select the **Download Survey Report Now** link provided in the email. The browser now downloads the report.

Net Promoter Score (NPS) Survey

In addition to the other available survey question types (Multiple Choice, Single Select, True or False, Rating Scale, Experience Rating, and Question), OGL also offers a **New Promoter Score (NPS)** survey type. This unique survey type employs a slightly different guide editing flow than traditional survey types and also has a separate analytics dashboard for analyzing NPS survey responses.

The survey feature requires the following OGL security role and permissions: Developer role → Edit Guides and Create/Import Guides permissions.

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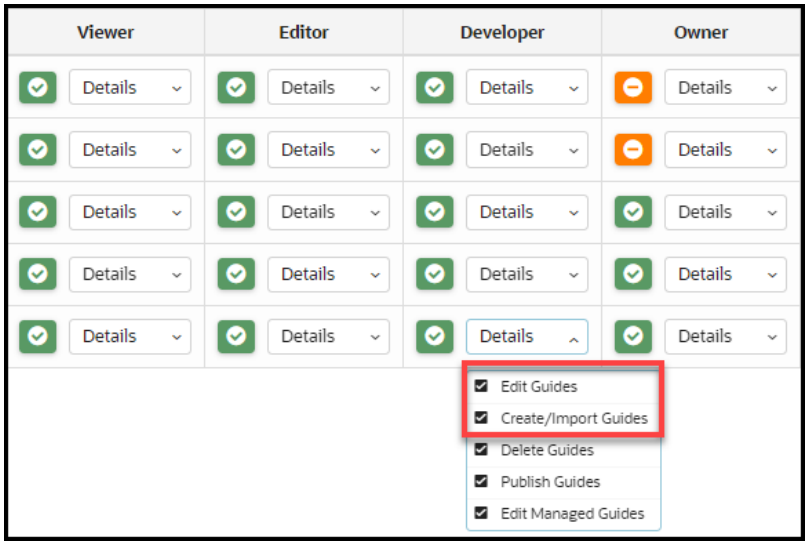
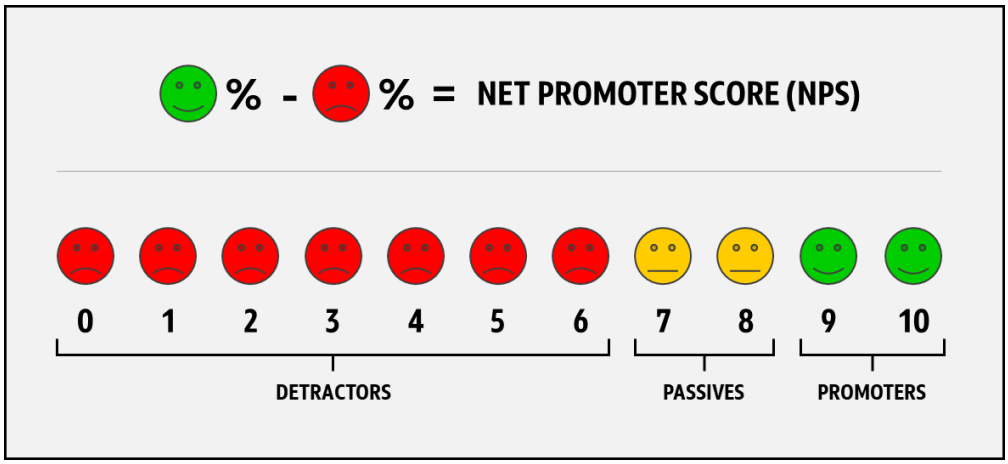


What is a NPS survey?

Net Promoter Score (NPS) is a market research metric that is based on a single survey question that asks respondents to rate the likelihood that they would recommend a company, product, or a service to a friend or colleague. The survey asks customers a single question: *"How likely are you to recommend our products or services to others?"*

Customers respond on a scale of 0-10, with 0 being *"not at all likely"* and 10 being *"extremely likely"*.



Based on the survey responses, customers are classified into three groups:

1. **Promoters** (score 9-10): These customers are loyal enthusiasts who are likely to recommend the business to others and are valuable assets to the business.
2. **Passives** (score 7-8): These customers are satisfied but not necessarily loyal and may be easily swayed by competitors.
3. **Detractors** (score 0-6): These customers are unhappy and likely to spread negative feedback about the business, which can harm the business's reputation.

How is a Net Promoter Score calculated?

Net Promoter Score is calculated by subtracting the percentage of detractors from the percentage of promoters. The formula for calculating Net Promoter Score is:

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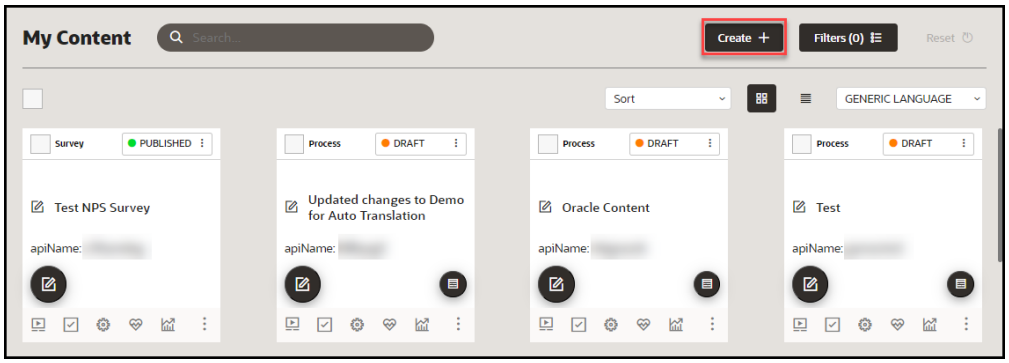
NPS = % Promoters - % Detractors

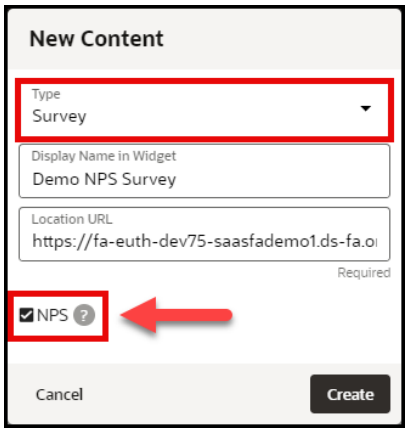
> **Note**
>
> For example, if 60% of respondents are promoters, 10% are detractors, and 30% are passives, your NPS would be: 60-10=50

Steps to create a NPS survey

1. From the My Content page, select the "**Create**" icon to create a new guide.



2. In the New Content modal, select **Survey** from the Type dropdown menu, enter a display name, and location URL, as required.**Important**: Select the **NPS** checkbox. This will load the NPS survey guide editor and flow.Then select **Create**.



3. In the NPS Survey editor, enter the text for your survey question in the Question field. (Optional - You can select **Add a link** to create a hyperlink to a specified URL.)

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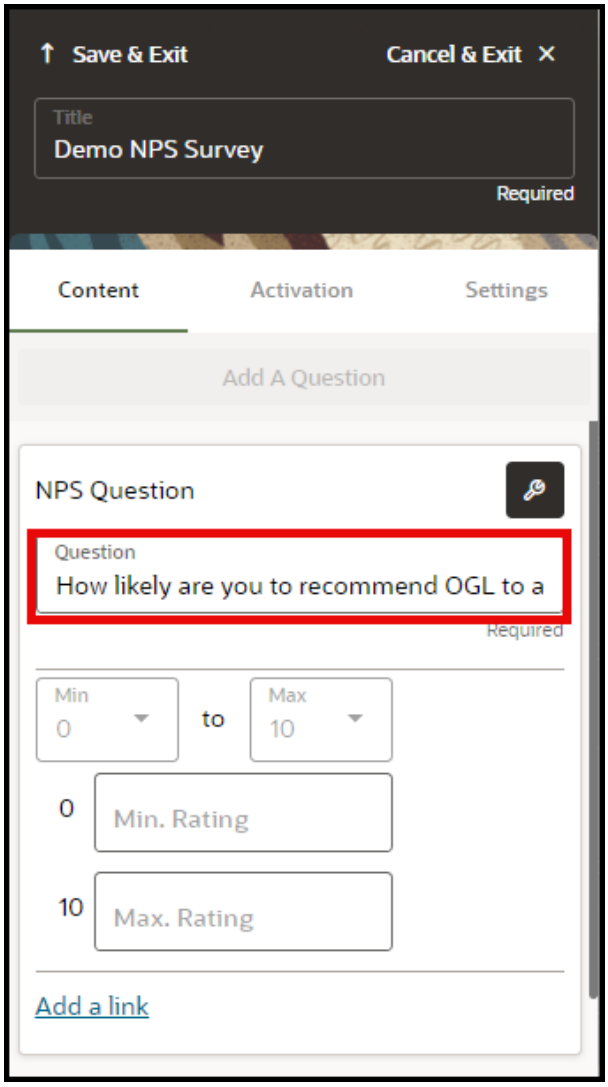

4. Select the **Question Settings** button ( )to apply any additional Display, Activation, or Advanced settings, as needed.

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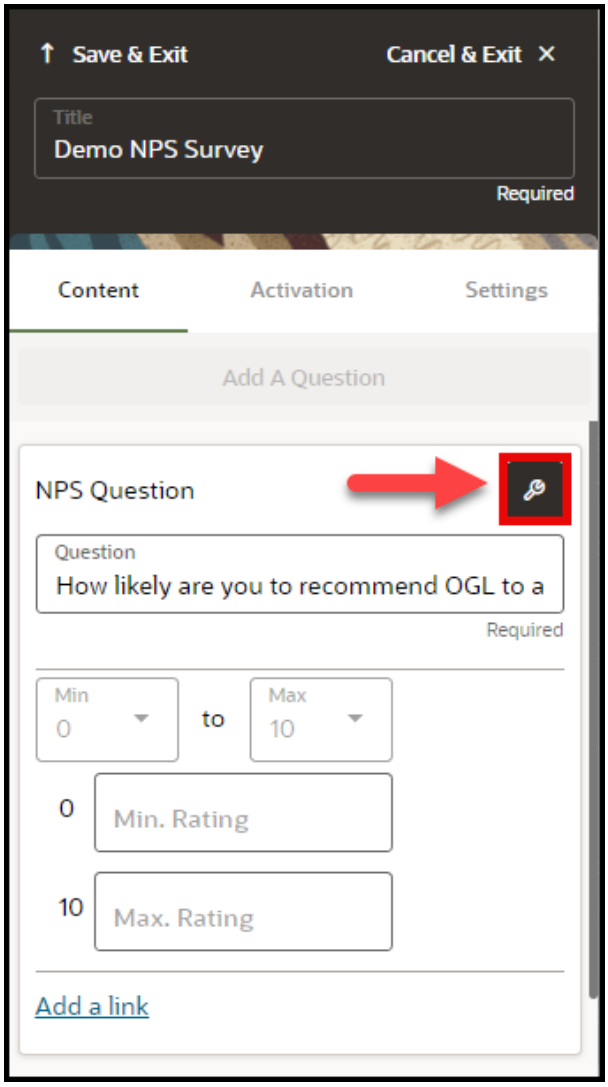

Apply settings, as needed, and close the Settings panel.

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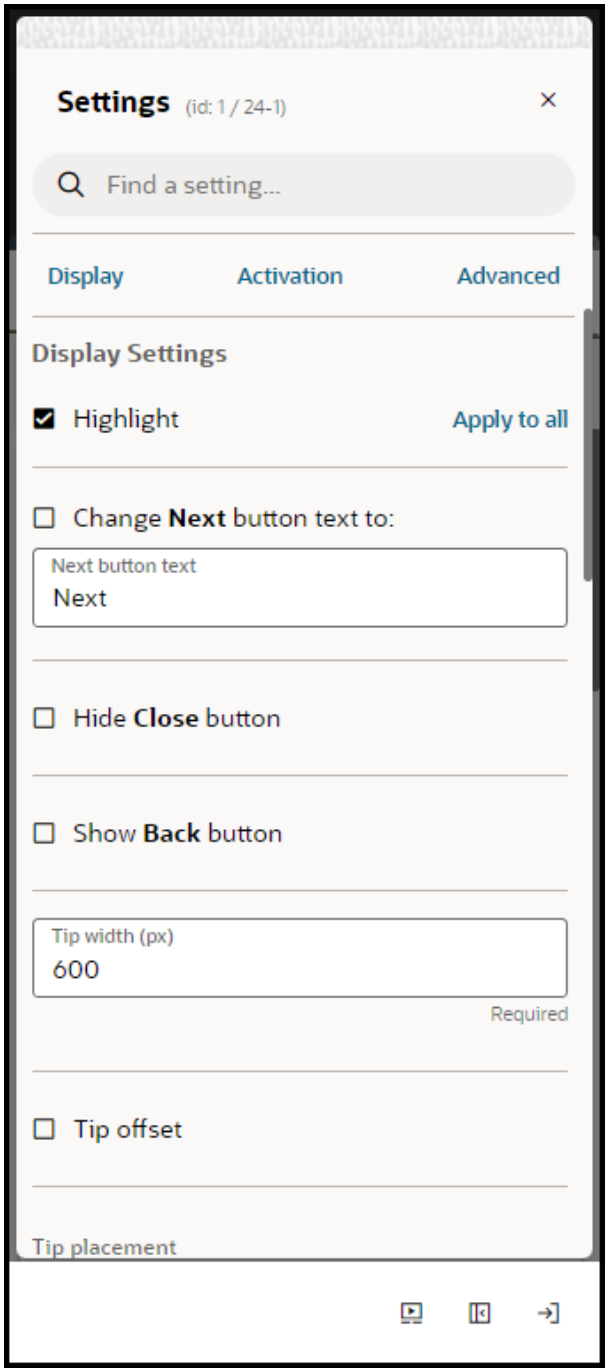

The survey question will appear in the NPS survey tip, as shown below:

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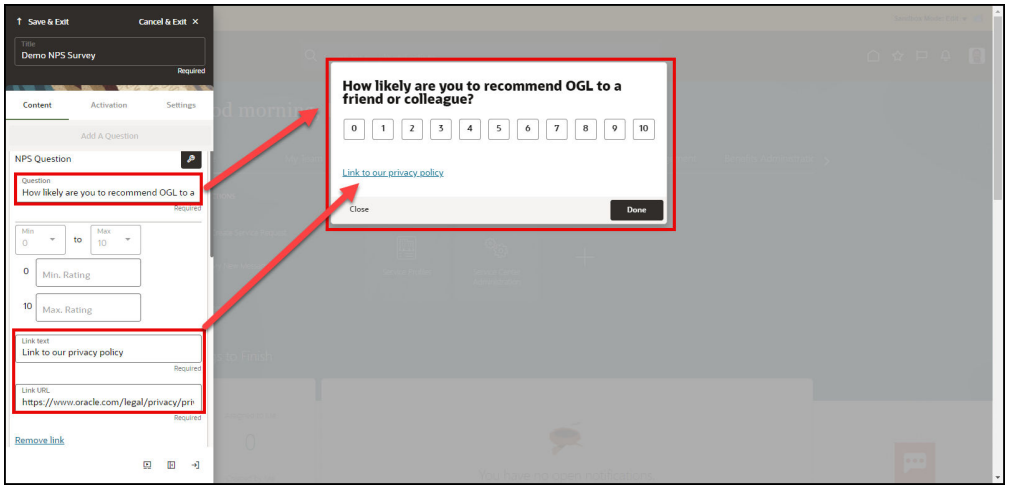

5. To enable follow questions, select the **Switch to show** button ( ) to enable follow up questions for Promoters, Passives, and Detractors, as needed.

   a. The Follow up question will be triggered based upon the survey respondent's rating (Rating of 9-10 triggers the Promotors Follow up Question, rating of 7-8 triggers the Passives Follow up Question, rating of 0-6 triggers the Detractors Follow up Question)

   b. Enter the Question text and Assistance Text for each follow up question, as needed.

   c. Select the **Question Settings** button ( ) to apply any additional Display, Activation, or Advanced settings, as needed.

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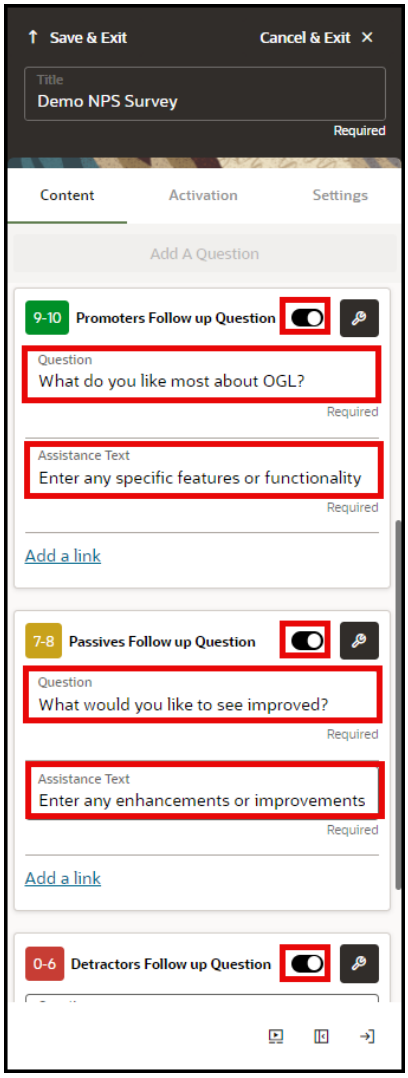

6. Select **Save & Exit**.

NPS Survey Analytics

OGL's NPS Survey feature offers a unique analytics dashboard that allows OGL administrators to view analytics specific to the NPS survey responses. The NPS Analytics dashboard allows to you see data related to Total Views, Total Unique Views, User Engagement, and Average Time Spent as well as an analysis of the NPS survey responses, including a breakdown of the total responses by Promoters, Passives, and Detractors. The Net Promoter Score is calculated by subtracting the percentage of detractors from the percentage of promoters.

The formula for calculating Net Promoter Score is:

NPS = % Promoters - % Detractors

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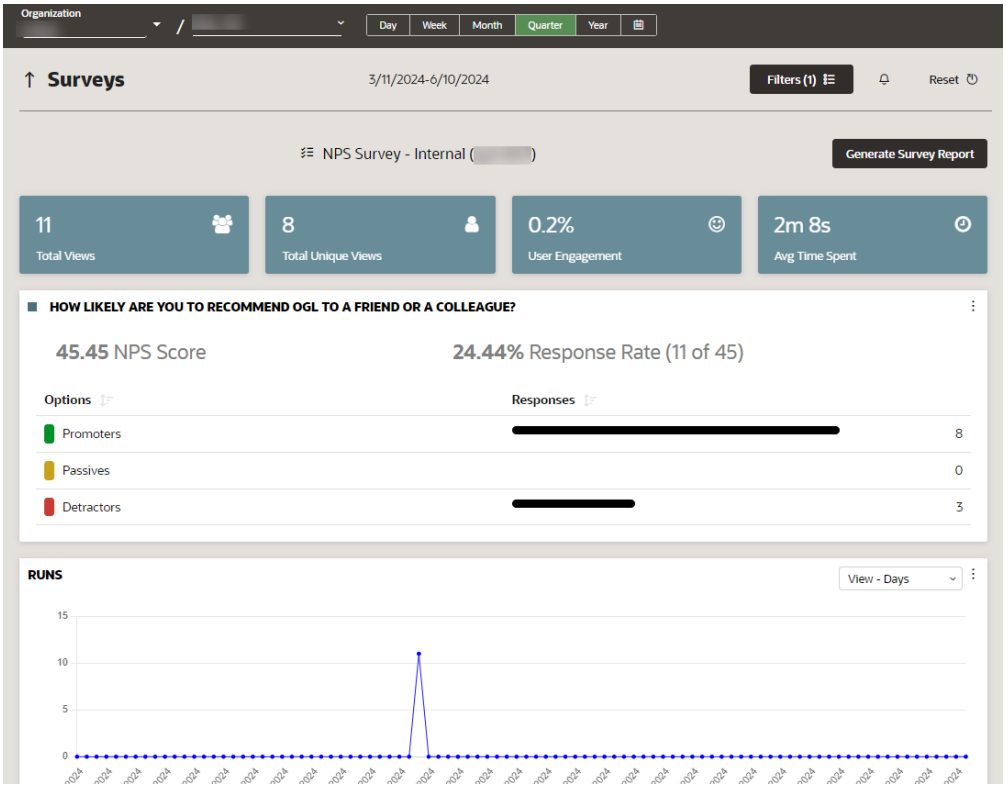

> **Note**
>
> For more information about the NPS Survey analytics, refer to the **Surveys Analytics Dashboard** topic

Working with Link Guides

Consolidation of Link, Video, and Training guides

In OGL 24B Release, the **Link**, **Video**, and **Training** guide types have been consolidated into a single guide type called **Links**, while preserving the full functionality and guide options previously available in Training Guides to offer more efficient management of similar guide types. All previous Link, Video, and Training guides that were created before OGL 24B release have all been converted into the new Link guide type and automatically tagged with the labels “Legacy Link”, “Legacy Video”, and “Legacy Training”, respectively, to ensure proper classification of these guides and to allow console users to easily identify all pre-existing guides of these types.

Creating Link Guides

Creating Links

To create a new Link Guide:

1. On the OGL homepage, select **Link** button in the Create row. (You can also select the Create +

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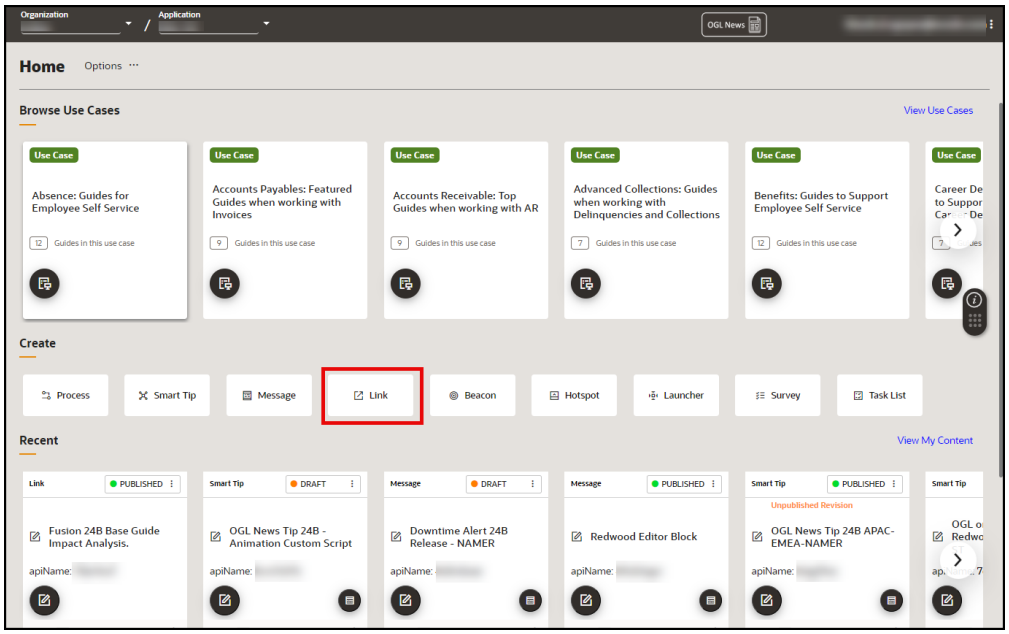
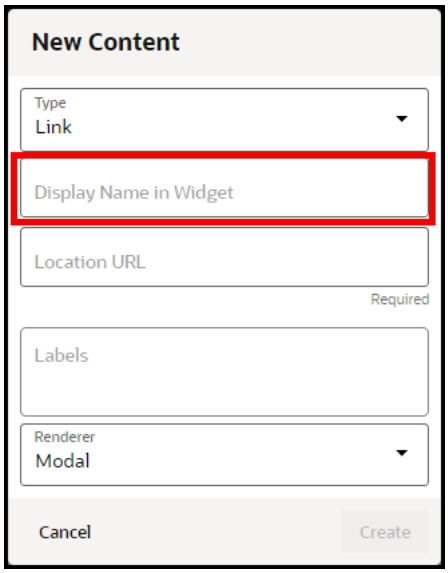
button from the Content page and select **Link** from the Type dropdown menu)



2. In the **Display Name in Widget field**, enter the name of the link as it should appear in the Help Panel (Widget). In the **Location URL** field, enter the complete URL of the page you wish to reference.



3. In the **Location URL** field, enter the complete URL of the page you wish to reference (For example: https://education.oracle.com/oracle-cloud-guided-learning-premium).

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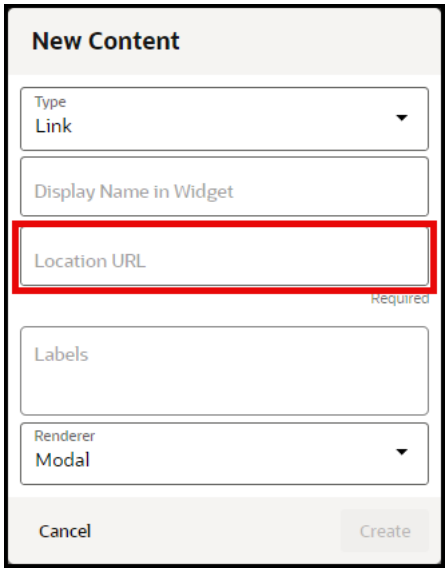
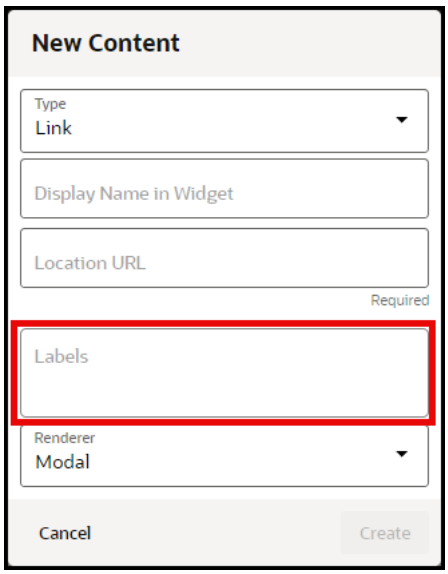


4. (Optional) In the **Labels** field, enter or select any labels with which you want to associate or tag the guide. You can also apply and manage labels in the Guide Settings for the guide at anytime.



5. Choose the desired **Renderer** for the link to determine whether the content will open in a modal, a new tab, or a new browser window..

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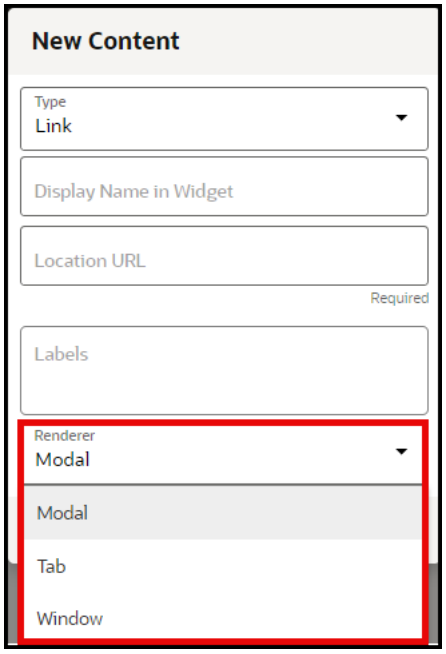

6. Select **Create** button when finished.

> **Note**
>
> Remember to set your activation conditions, refer to the Enabling Guide Activation Settings section

Working with Created Content on the Console

Content Management

The Guided Learning content management interface provides a detailed overview of the content in the app ID. Chose from over 40 columns to achieve the view that best supports your content analysis.

Accessing the Content Management Interface

1. On the **Main Navigation Menu**, select **Content**.

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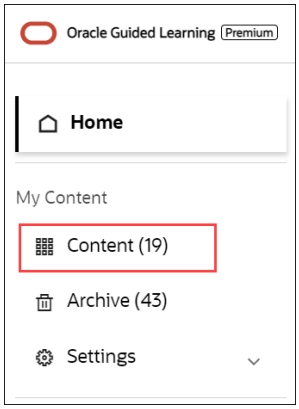
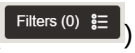
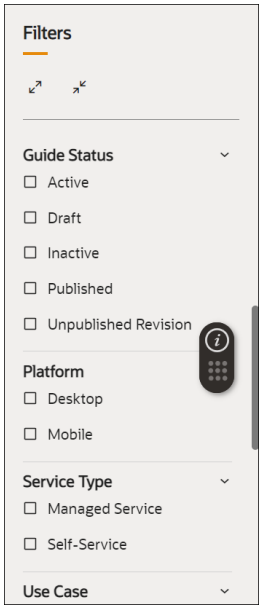


My Content screen is displayed.

2. Use the **Filters** option (

) to filter the contents you want to view/manage. By default, all contents are selected.

> **Note**
>
> Exporting guide content using the Content Management interface may take longer depending upon the number of guides selected for the exporting and whether you choose to include screenshots. Prior to using the Content Management export feature, apply the desired filters (or language selection) in the OGL Console, then access the Content Management interface. The table will only display the filtered items.



3. Select the **User Menu** in the top-right corner.

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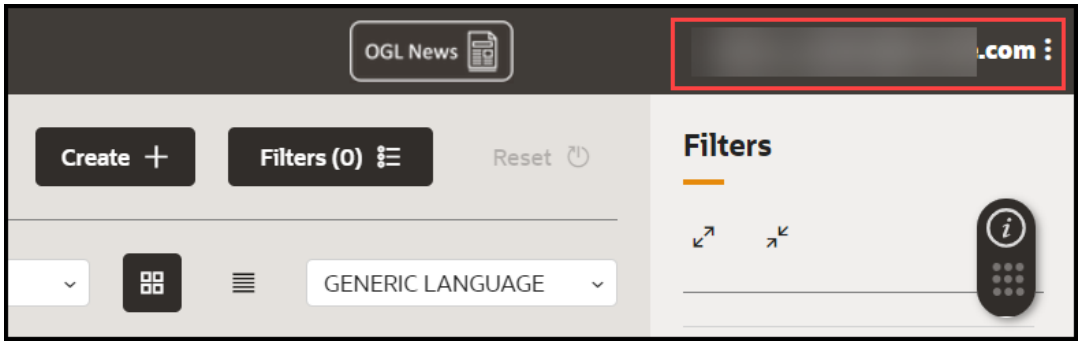
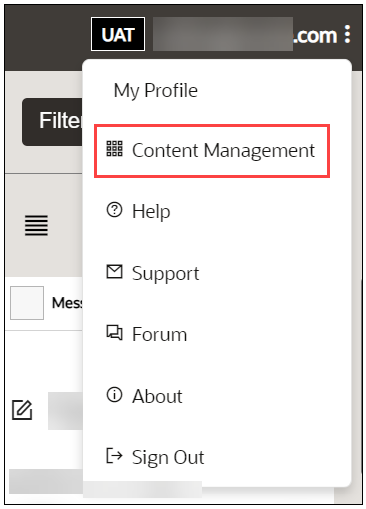
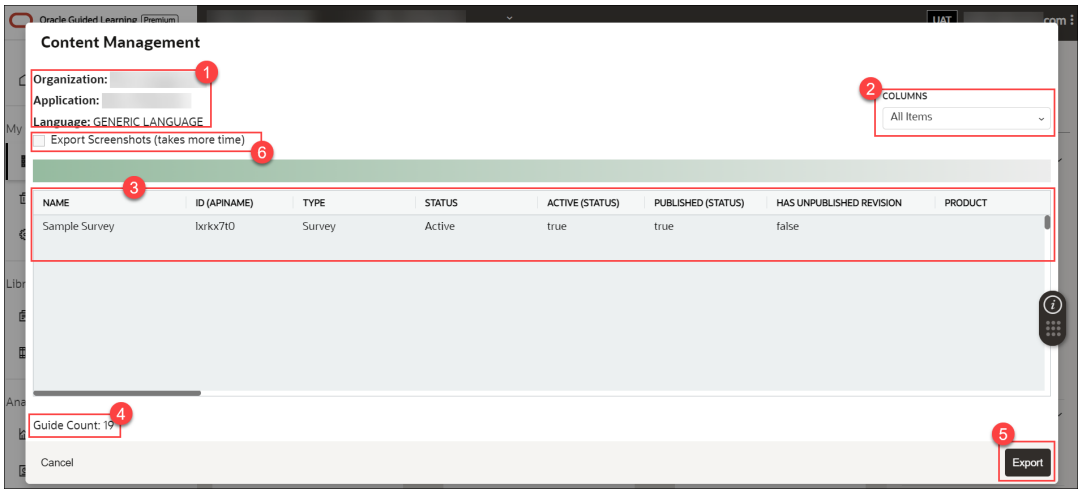


The drop-down menu is displayed.

4. Select **Content Management**.



5. The below interface is presented.



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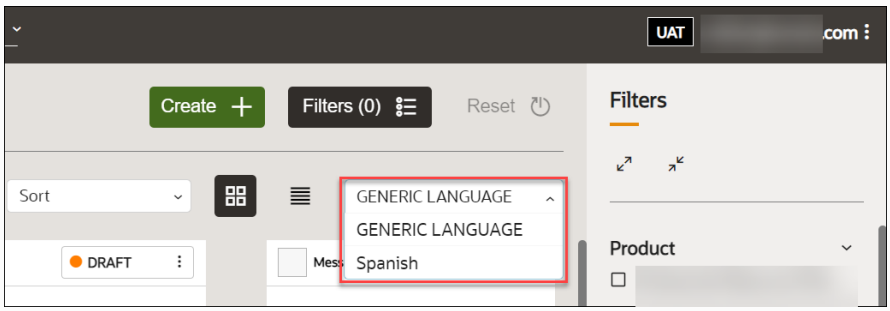
Legend	Description	Additional Information
1	Account Information	This section provides the organization, application, and language information. **Note** To analyze information in any of the available languages, select the language from the OGL Console, then access the Content Management interface. 
2	Content Information Columns	There are over 40 columns to support analysis of the content, this includes, step text, selector ID, item status, etc

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Legend	Additional Information
3	Content Detail Table	This table lists all the contents that you filter. It also shows additional details like the API ID, content type, status, etc.
4	Guide Count	This is the total guide
5	Export	Export allows you to export the Content Detail to a spreadsheet file for further analysis

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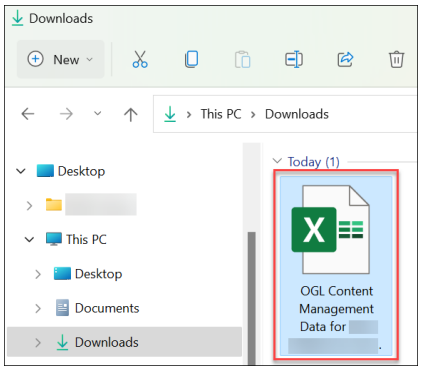
Legend	Description
6	Export Screenshots	This option allows you to include screenshots of all selected guides in the export file. **Note** Selecting this option may take more time to export.

6. Check the **Export Screenshots** option if you want to include screenshots in the report.
7. Select the **Export** button (Export).
The browser now downloads the report in Excel format (.xlsx).



8. Open the downloaded file.
The Excel report looks like this.

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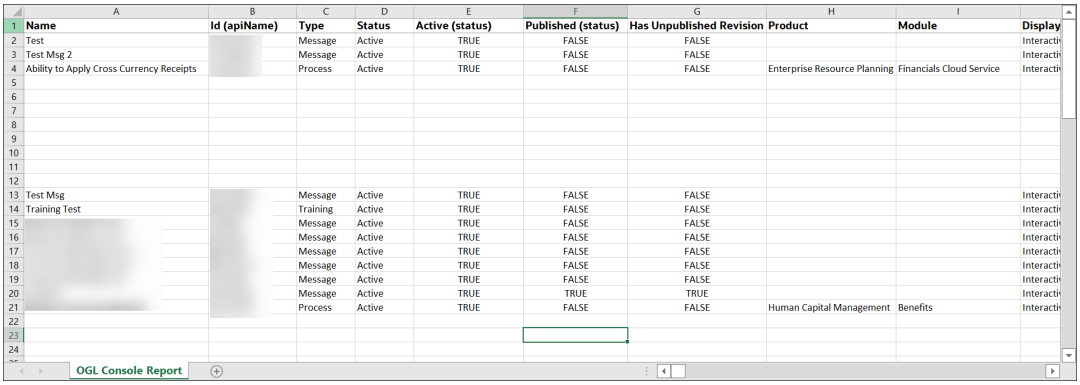

	A	B	C	D	E	F	G	H	I	
1	Name	Id (apiName)	Type	Status	Active (status)	Published (status)	Has Unpublished Revision	Product	Module	Display
2	Test		Message	Active	TRUE	FALSE	FALSE			Interacti
3	Test Msg 2		Message	Active	TRUE	FALSE	FALSE			Interacti
4	Ability to Apply Cross Currency Receipts		Process	Active	TRUE	FALSE	FALSE	Enterprise Resource Planning	Financials Cloud Service	Interacti
5										
6										
7										
8										
9										
10										
11										
12										
13	Test Msg		Message	Active	TRUE	FALSE	FALSE			Interacti
14	Training Test		Training	Active	TRUE	FALSE	FALSE			Interacti
15			Message	Active	TRUE	FALSE	FALSE			Interacti
16			Message	Active	TRUE	FALSE	FALSE			Interacti
17			Message	Active	TRUE	FALSE	FALSE			Interacti
18			Message	Active	TRUE	FALSE	FALSE			Interacti
19			Message	Active	TRUE	FALSE	FALSE			Interacti
20			Message	Active	TRUE	TRUE	TRUE			Interacti
21			Process	Active	TRUE	FALSE	FALSE	Human Capital Management	Benefits	Interacti
22										
23										
24										

OGL Console Report

Note

Known Issue with this feature: When exporting data in the Content Management interface with the "Export Screenshots" option unchecked, the export file will include a column labelled "Screenshot" (last column) that contains URLs. These URLs, when accessed, will open a file containing a very long text string that is not valuable to the user. This will be fixed in a future release in which the URLs listed in the Screenshot column will be replaced with a True/False value indicating whether or not a screenshot is present.

	AR	AS
1	Step Selector/XPath	Screenshot
2		
3		
4		https://guidedlearning.oracle.com/api/edge/app/ /screenshot/ga5epuvq0v/
5	#groupNode_receivables	https://guidedlearning.oracle.com/api/edge/app/ /screenshot/3xix8s0v7u/
6	#itemNode_receivables_re	https://guidedlearning.oracle.com/api/edge/app/ /screenshot/jbwn509u8i/
7	[alt="Tasks"]	https://guidedlearning.oracle.com/api/edge/app/ /screenshot/klfqtnwfuch/
8	|OFS|{"viewId":"/ReceiptC	https://guidedlearning.oracle.com/api/edge/app/ /screenshot/6jsaipd415i/
9	|OFS|{"viewId":"/ReceiptC	https://guidedlearning.oracle.com/api/edge/app/ /screenshot/cutb9d91o9f/
10	|OFS|{"viewId":"/ReceiptC	https://guidedlearning.oracle.com/api/edge/app/ /screenshot/bwlqfwmj4i/
11	|OFS|{"viewId":"/ReceiptB	https://guidedlearning.oracle.com/api/edge/app/ /screenshot/ytahrwatjb/
12		https://guidedlearning.oracle.com/api/edge/app/ /screenshot/om7js0nckl/
13		

Guide Status Management

Guide statuses are displayed on top right corner of the guide in the tile view.

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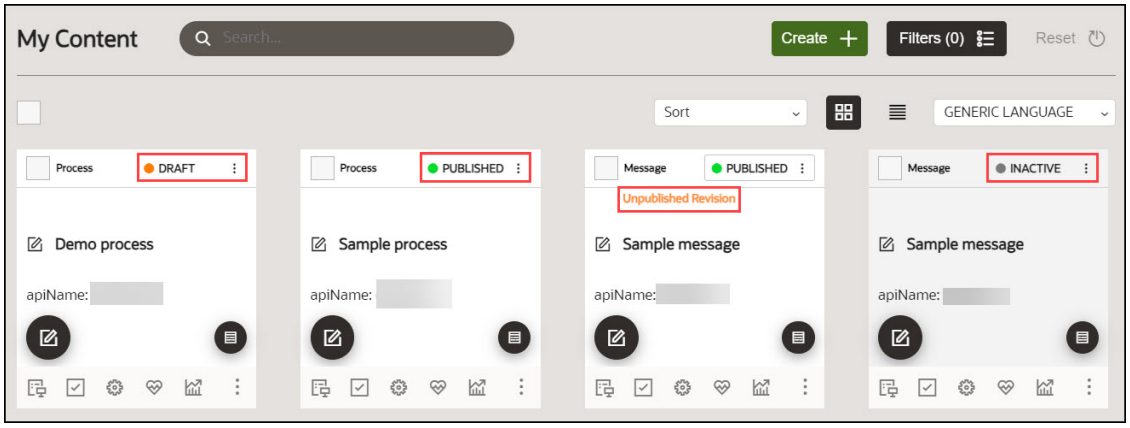


A guide can be in one of the following statuses:

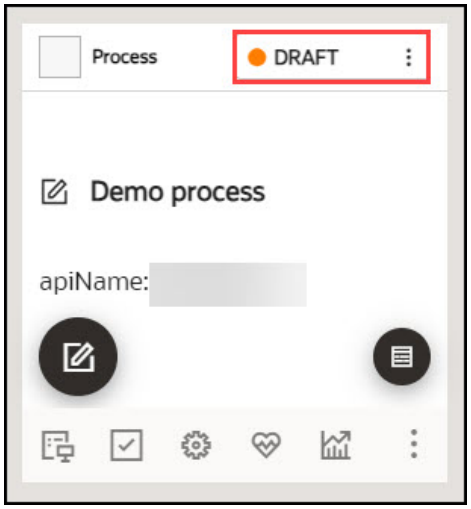
Table 4-1

Guide Statuses	Description
DRAFT	The guide is available only in DEVELOPMENT environments.
PUBLISHED	The guide is published and available in both DEVELOPMENT and PRODUCTION environments.
PUBLISHED with an **Unpublished Revision**	There is a published revision of the guide, which is available in the PRODUCTION instance, and there is also an UNPUBLISHED REVISION (usually an updated version) of the guide which is only available in the DEVELOPMENT environment.
INACTIVE	The guide is not active and cannot be accessed in the DEVELOPMENT or PRODUCTION environments.

Guide Cycle

Draft Status

When a guide is created but not yet published, it is assigned a **DRAFT** status. Guides with Draft status can only be accessed in Development instances.



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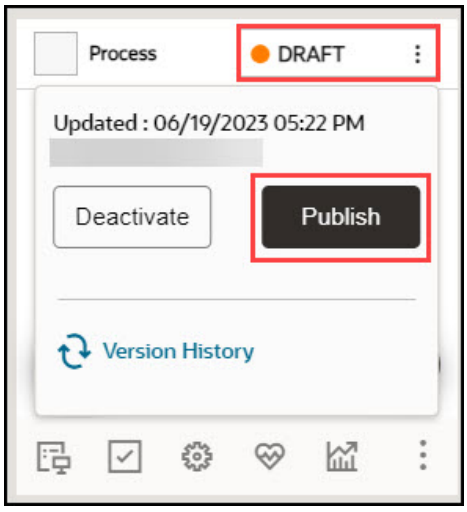
Published Status

Publish the guide in DRAFT status to change their status to "**PUBLISHED**". Once published, these guides will be accessible in both the Production and Development instances.

To publish a guide in DRAFT status:

1. Select the **DRAFT** button.
2. Select **Publish**.

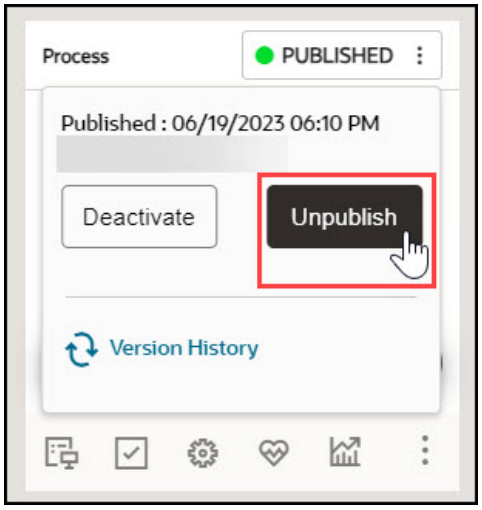


The status is changed now to **PUBLISHED**.

> **Note**
>
> Please be aware it may take up to 5-10 minutes for the changes to reflect in the Production instance.

To unpublish a guide in PUBLISHED status:

1. Select the **PUBLISHED** button.
2. Select **Unpublish**.



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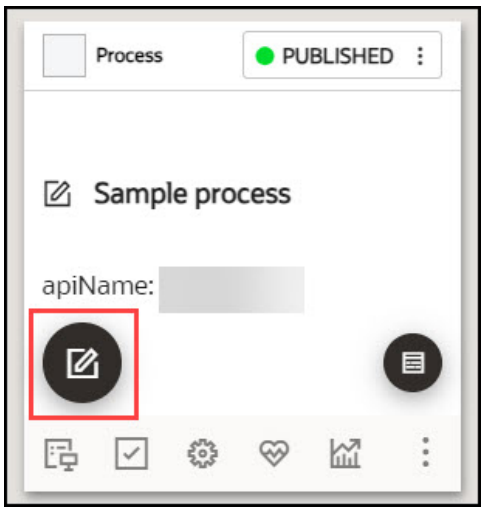
The status of the guide now changes to **Draft**.

Published Status with Unpublished Revision

After guides are published, they can still be revised. When revisions are made but have not yet been published, the guides will be labeled as "**Unpublished Revision**."

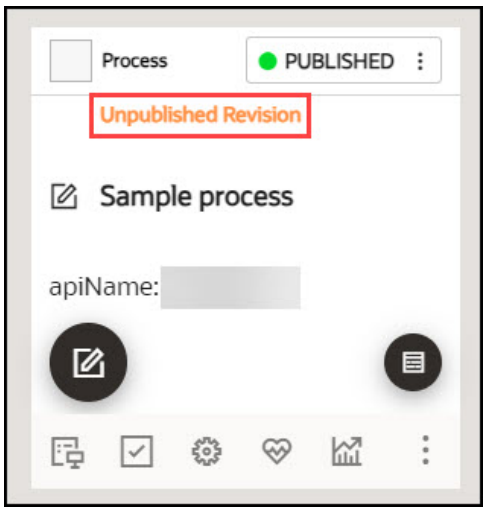
To revise a published guide:

1. Select the **Editor** icon on the **PUBLISHED** guide.



   The guide editor launches.

2. Make desired changes in the guide.
3. Select **Save & Close**.
   The guide is now labeled as "**Unpublished Revision**."



To publish an Unpublished Revision:

1. Select the **PUBLISHED** button.
2. Select **Publish**.

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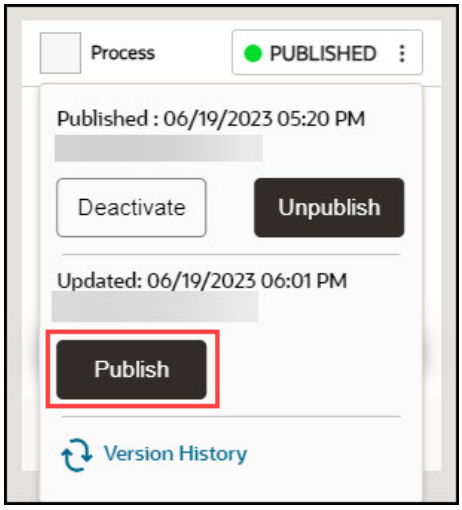
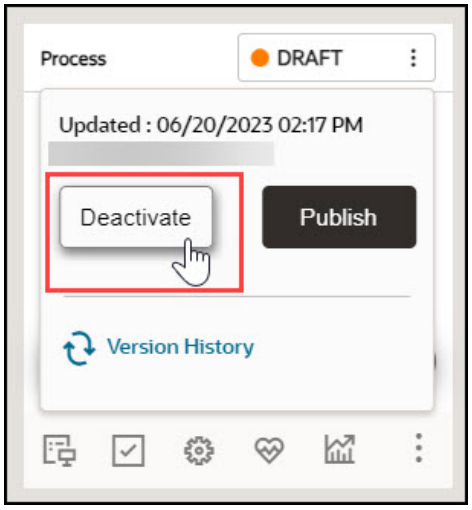


Inactivated Status

Both the guide in DRAFT and PUBLISHED status can be inactivated.

To make a guide inactive:

1. Select the DRAFT/PUBLISHED button.
2. Select **Deactivate**.



The guide is now inactivated.

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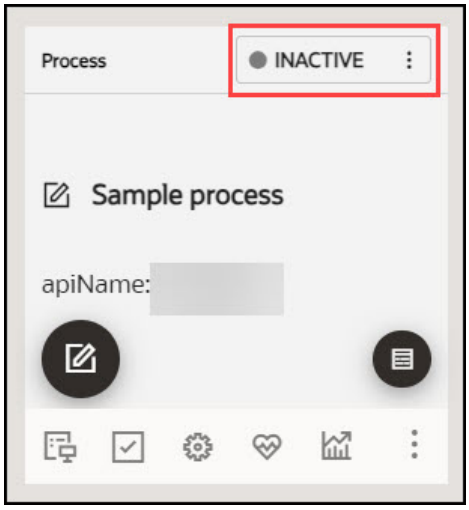
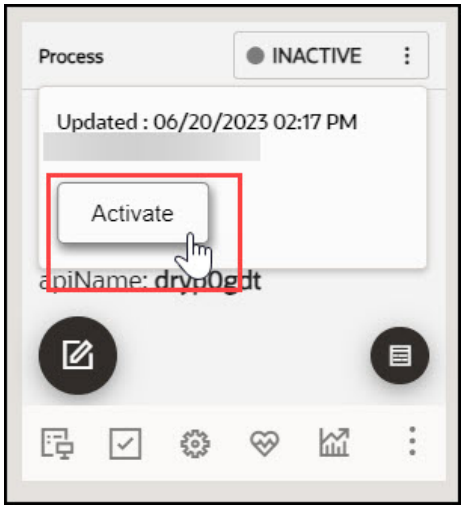


To return an inactive guide to its previous status:

1. Select the **INACTIVE** button.
2. Select **Activate**.



The status is now changed back to its previous state, either as a draft or as published.

Version History

This feature allows OGL developers to automatically save multiple versions of their active guides and provides the ability to preview any prior versions of guides. OGL console users with appropriate permissions can view the version history of guides and can select a previous version to be restored. OGL console users must have the **Developer** security role and **Edit Guides** permission.

To access the version history of a guide:

1. Select the DRAFT/PUBLISHED button, then select **Version History**.

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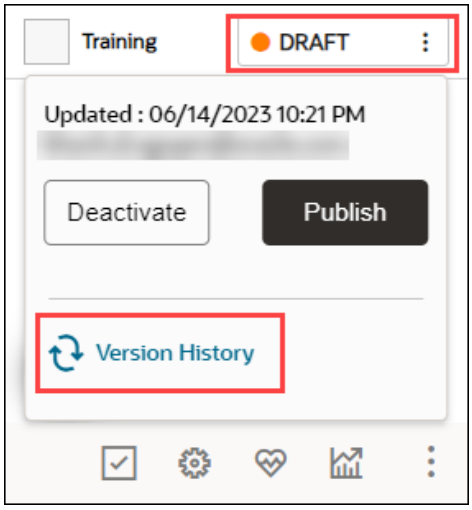
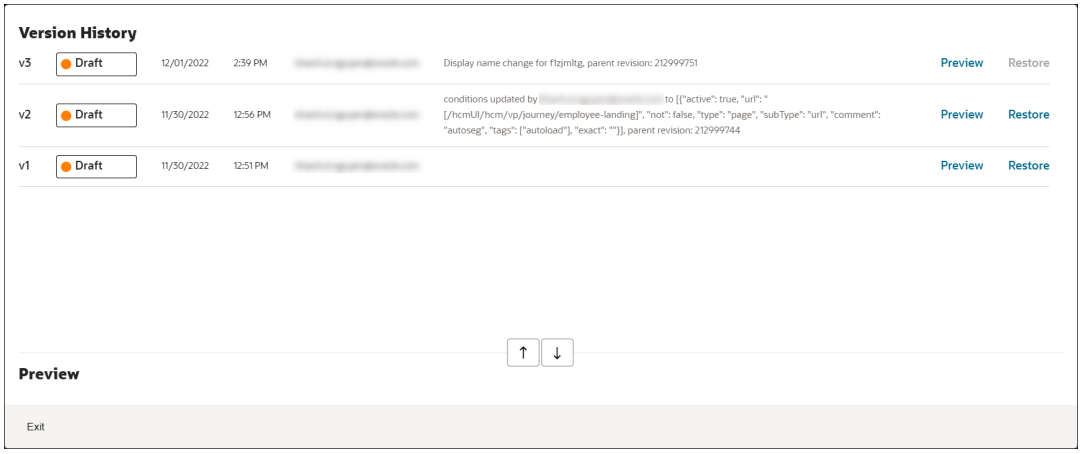
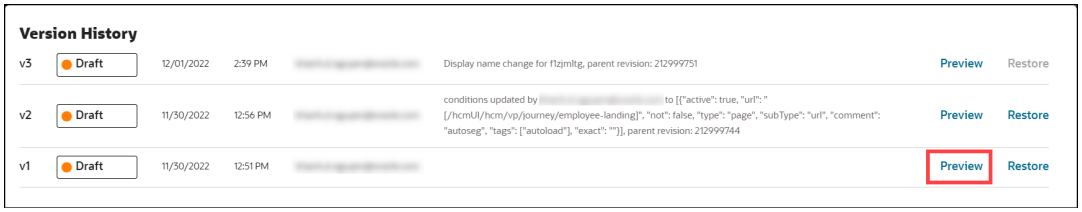


The Version History opens in a modal displaying all prior versions of the guide, including the date and time of each revision, and the username of the OGL administrator who edited/saved each version.Guide versions are listed sequentially in descending order by date (newest to oldest).



2. To preview any prior version of the guide, select the corresponding **Preview link to the right of the version.**



The preview will expand in the modal to display a step video, screenshots, and steps contained within of the guide (if applicable) as well as well as the text contents of each step.

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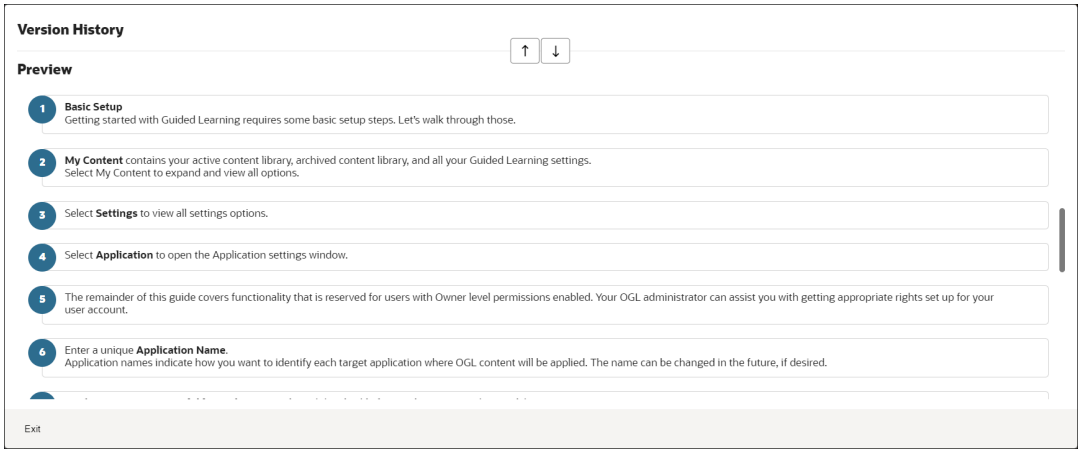
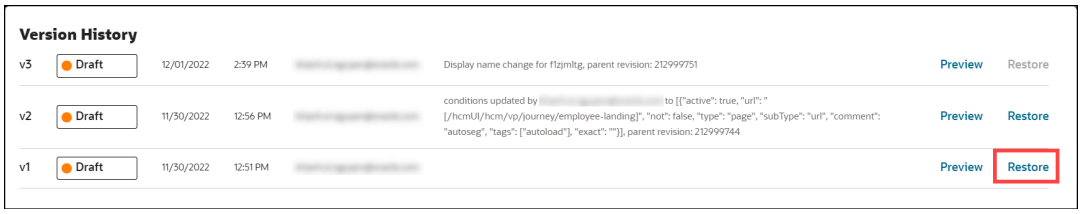
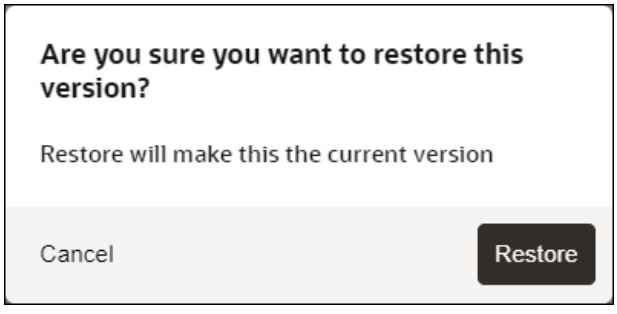


> **Note**
>
> The preview displayed within the Version History is read-only and will not allow you to edit the guide contents. To edit the guide content, you will need to use the OGL Editor or Content Editor to make changes.

3. To restore the guide to a previous version, select the corresponding **Restore** button to the right of the version you wish to restore.



A dialog message will appear prompting you to confirm the action or cancel. Select **Restore** to confirm and continue.



A new version of the guide will appear at the top of the Version History modal with a comment indicating that a new revision has been created from a previous version.

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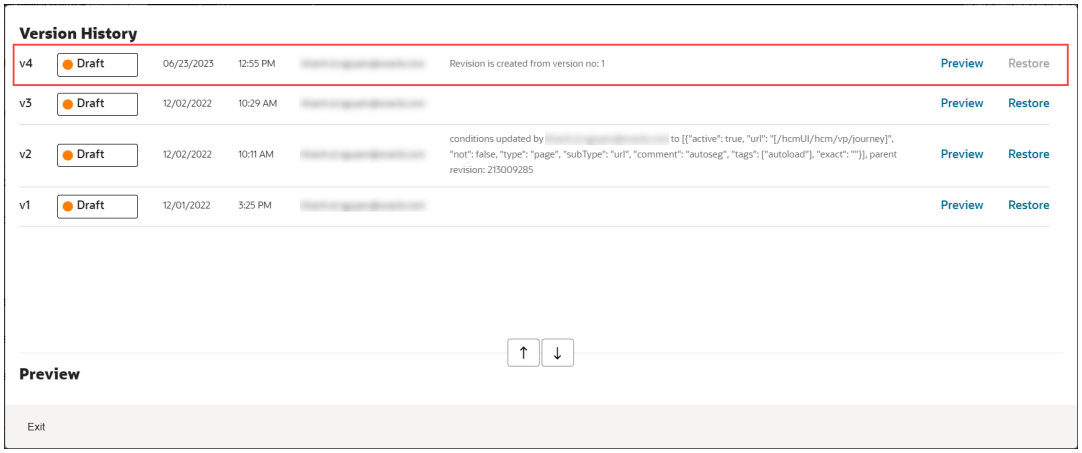

> **Note**
>
> **Known Issue:**
> If you create a guide, translate it to another language, and then delete any steps from the guide in the original Generic Language folder, the translated version will also show the steps deleted, as intended. However, the older versions of the guide in Version History will also show those steps as deleted within the Preview. This issue occurs only within the Preview and will not delete those steps from prior versions. If you restore the guide to an older version, the Preview will be restored in the Content Editor and will show the deleted steps as restored.

Content Editor

The **Content Editor** enables you to make simple text edits to guides without the need to access the OGL Editor. OGL administrators can provide you access to the Content Editor only (if required) for reviewing and making simple updates. Users who have the appropriate security role and permissions can make the following changes to a Guide from the Content Editor:

1. Edit and format guide step text.
2. Translate guide step text in a connected guide.
3. Add links to a guide step.
4. Add/edit Guide and Step Comments.

> **Important**
>
> In order to access the **Content Editor**, your profile must have **Editor** Role/ Permissions enabled.
> Learn more about **User Management**.

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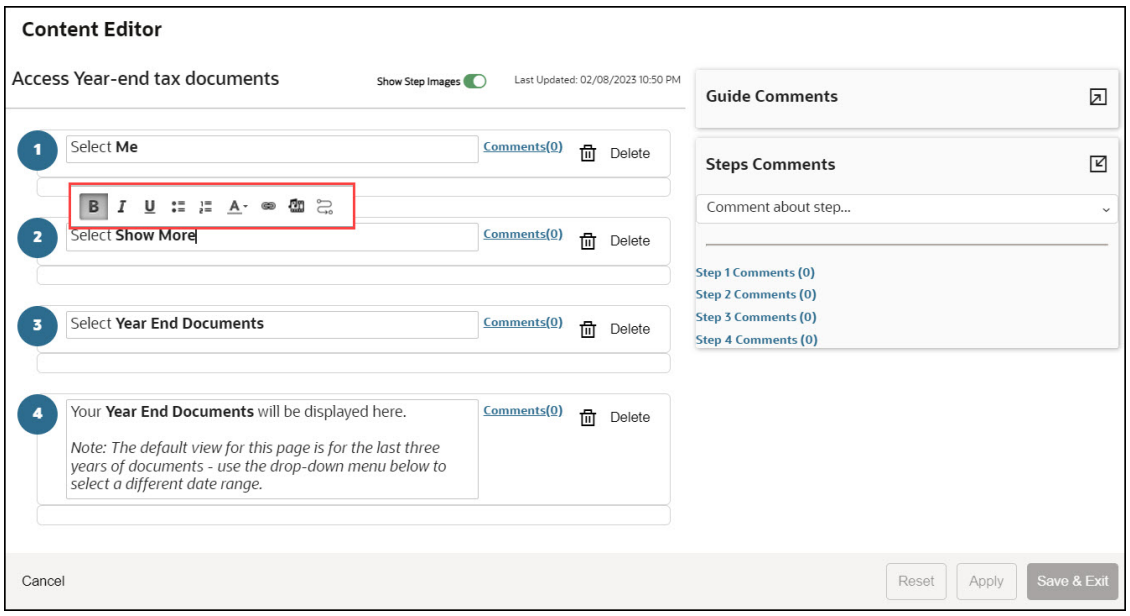
To learn how to access the **Content Editor**, please refer to the "**Working with the Editors**" section.

Editing the Text Using the Content Editor

On the Content Editor panel, select the text in a specific step to make changes.

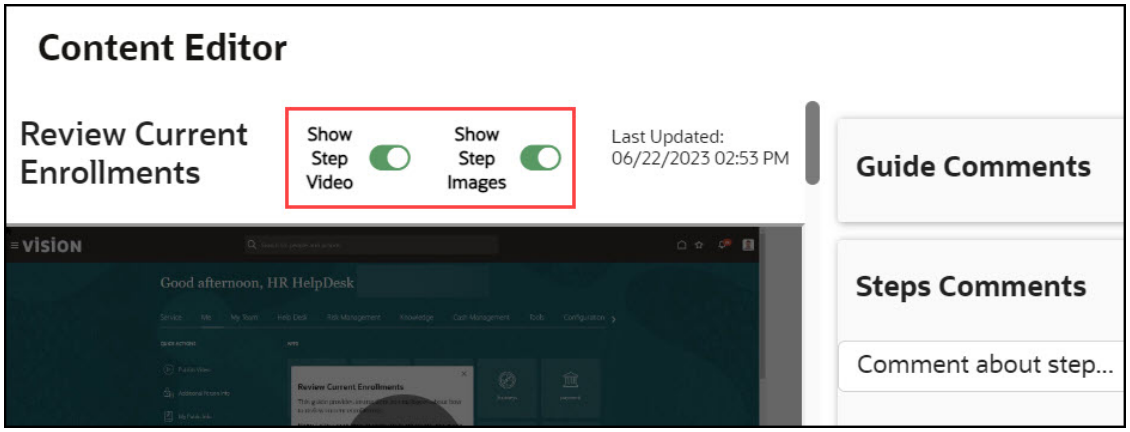


The below controls are displayed when you select a step, allowing you to make changes to the text, add bullet points, change the font color, or embed a link and multimedia.

To learn how to use the formatting tools, please refer to the "**Editing Guide Content**" section.

Showing or Hiding Step Videos and Step Images

To display or hide the step images and videos, use the toggle button.



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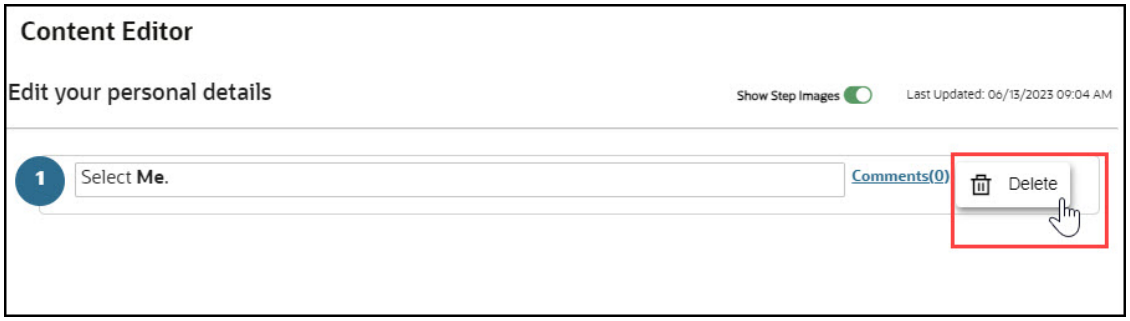
Deleting Steps Using the Content Editor

With the Content Editor, you can delete guide steps.

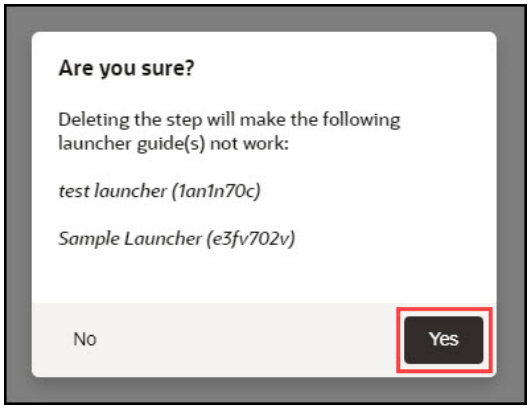
> **Important**
>
> Deleting guide steps using the Content Editor requires the **Developer** security role and **Edit Guides** permission.
> Learn more about **User Management**.

To delete a step, select the **Delete** button located next to the respective step.



To delete the step, a confirmation dialog will appear, and you must select **Yes**.

> **Important**
>
> Use caution when deleting guide steps using the Content Editor as this may cause some guides to break or malfunction. It it strongly recommended that you test your guide after deleting any steps.
>
> Learn more about **User Management**.



The step is now deleted.

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> **Important**
>
> Once a guide step is deleted using the Content Editor, you cannot undo this action. Instead, you will need to restore the guide to a previous version using the **Version History** in the **Guide Status**.Learn more about Version History
>
> If you delete any steps from a guide, the other versions of the guide in Version History will also show those steps as deleted within the Preview. This issue occurs only within the Preview and will not delete those steps from prior versions. If you restore the guide to an older version, the Preview will be restored in the Content Editor and will show the deleted steps as restored.

Guide and Step Comments

To support collaboration between multiple OGL developers or guide reviewers, OGL provides a comments feature that allows guide reviewers with editor access to add comments to a guide or an individual step within a guide. This feature allows OGL developers and reviewers to collaborate efficiently on edits and guide status throughout the review and approval process. This incorporates a simple "**What you see is what you get**" (**WYSIWYG)** editor.

Examples of potential comments that could be made about an overall guide include:

- "Guide passes testing"
- "I cannot find this guide in the widget"
- "This guide failed testing, see comment on Step 12"
- "We don't use Milestones, so this guide must have those steps removed."
- "This guide must be expanded upon because we have some custom workflows.''

Examples of comments that might be made at the step level include:

- "Please change the selector for this step to Personal Information"
- "Guide does not advance after this step"
- "Please insert a smart tip on the date field"
- "Please insert a link to the travel policy in this tip"

Comments can be added, viewed, and edited through the content editor or included when editing in the full editor.

Adding Guide Comments

This feature allows you to enter issues or comments into the guides.

To add guide comments:

1. Select the expand icon to access the text field.

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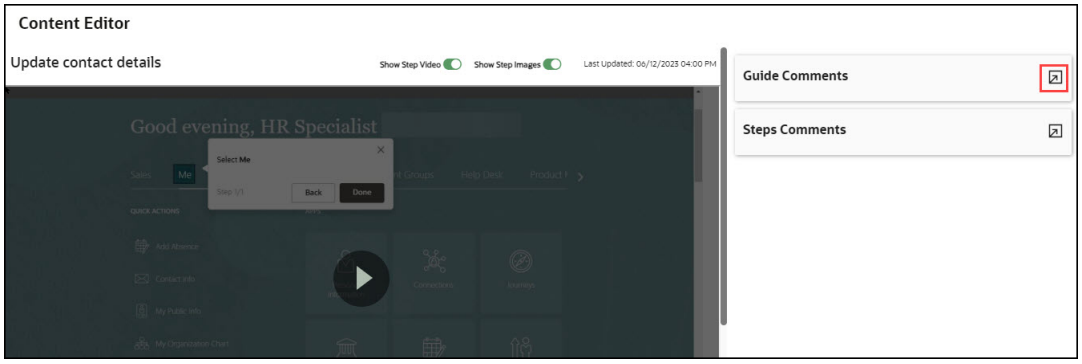
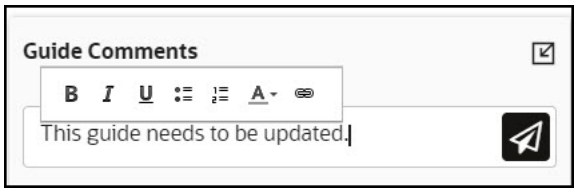


2. Enter the comments and select the **Send** button ( ).



The issue/comment is now added to the guide and is visible here.

Comments are displayed in date/time order, with the newest comment at the top of the list. OGL Editors can review all comments added to a guide from the comments panel and use the comments links to view comments related to a specific step. All comments are date, time, and user stamped.

Comments can be edited or deleted from the comments panel.

Resolving an Issue

After fixing the issue, the concerned individual can mark it as resolved.

To mark an issue as resolved, select **Resolve**.

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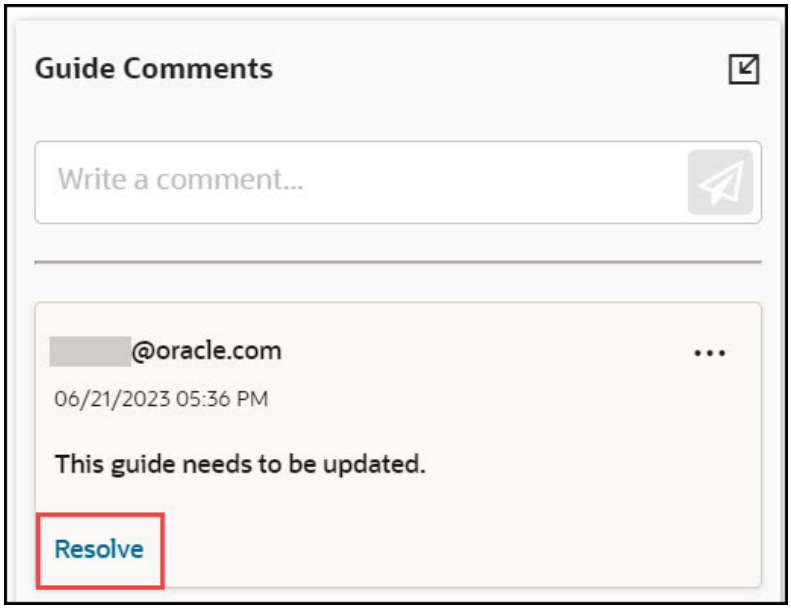
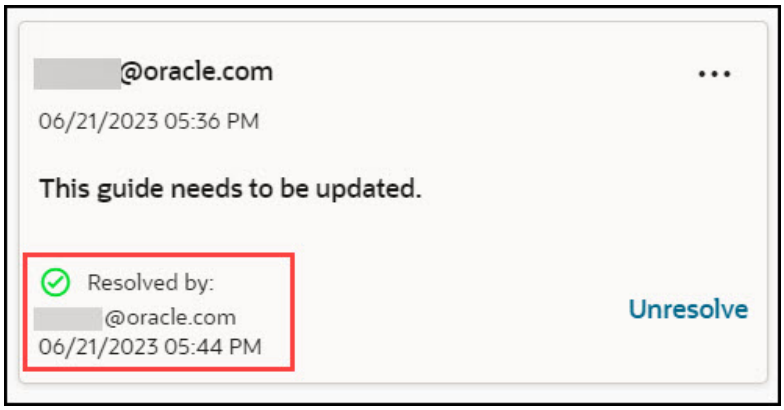


The issue is now marked as resolved.



Revert a Resolved Issue

To undo the resolved issue, select **Unresolve**.

Adding Step Comments

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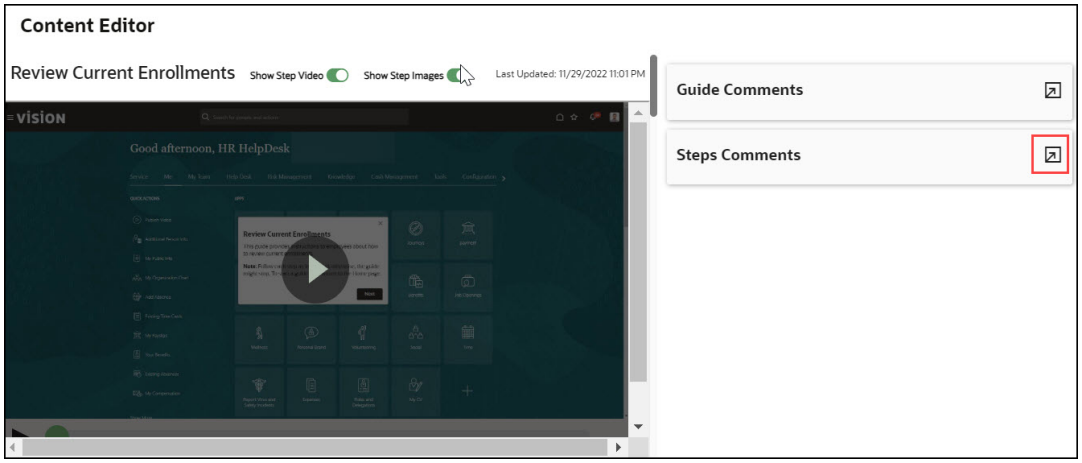
This feature allows you to enter issues or comments into specific steps.

To add step comments:

1. Select the expand icon to access the text field.



2. Select the step you want to add the comment/issue to.

3. Enter the comments and select the **Send** button ( )

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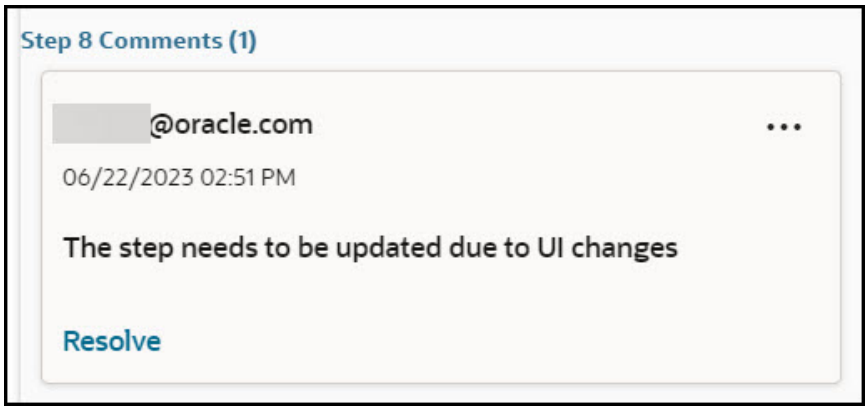
The issue/comment is now added to the step and is visible here.

Comments are displayed in date/time order, with the newest comment at the top of the list. OGL Editors can review all comments added to a guide from the comments panel and use the comments links to view comments related to a specific step. All comments are date, time, and user stamped.



Resolving an Issue

After fixing the issue, the concerned individual can mark it as resolved.

To mark an issue as resolved, select **Resolve**.

Revert a Resolved Issue

To undo the resolved issue, select **Unresolve**.

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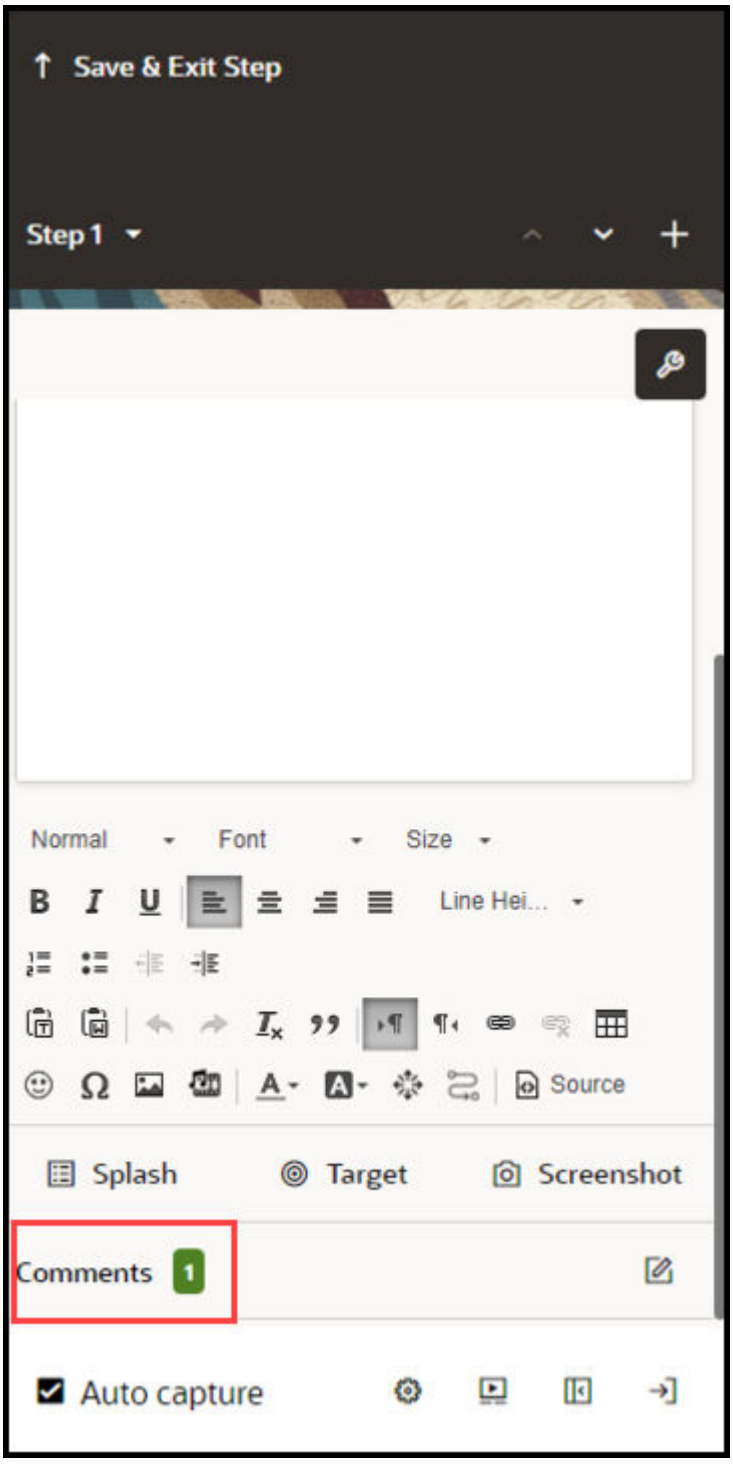
Note

To view comments for a step, simply access the **OGL Editor**. If there are comments available, the **Comments** button will display the number of comments as highlighted in the below screenshot.



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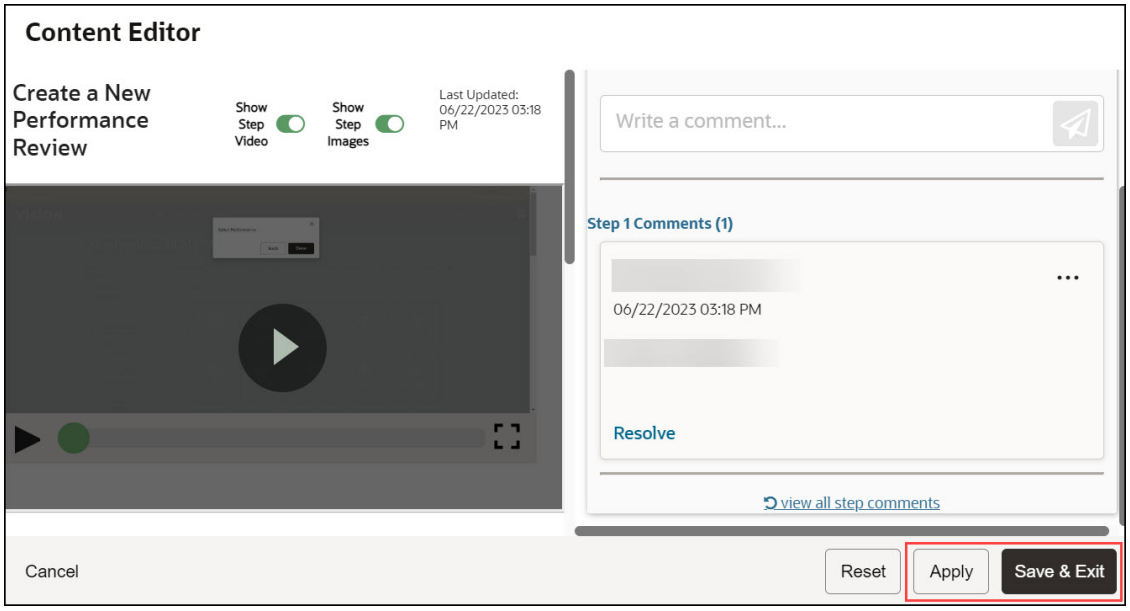
Saving Changes

Once you finish editing, select **Apply** or **Save & Exit,** andthe guide status will update to **Unpublished Revision**. Depending on your permissions, you can either publish the guide changes to production or request that the changes are published by an OGL administrator with the appropriate permissions.



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NOT_SUPPORTED

- Comment Edit and Delete buttons are only available if the OGL developer or User has the correct permissions.
- All comments show the user name of the user who added them and the date that the comment was added. If the date is today's date, then it will show the number of hours since the comment was made.
- Comments can be edited and deleted by the creator of the comments.
- Users with the Manage Comments permission under the Owners group can edit or delete comments.
- Comments remain with the guide for the life of the guide.
- Comments are copied with the guide if it is cloned.
- When a tip or entire step is deleted, the comments are deleted also., even if the user does not have the Manage Comments permission.
- The character limit in all comments is 512 characters.
- Each comment creation field includes a character limit counter that dynamically counts down from the character maximum as the user types.
- When a user deletes a comment, they are prompted with the following message: “Are you sure that you want to delete this comment?”.
- If the user has not seen the guide or step comments, an indicator lets them know that new comments are available.

Guide and Step Comments

Note

The Guide and Step Comments feature and functionality will be removed from the OGL console in OGL 25D.

To support collaboration between multiple OGL developers and or guide reviewers, OGL now provides a comments feature that allows guide reviewers with editor access, to add comments to a guide or to an individual step within a guide. This feature will allow OGL developers and reviewers an efficient way to collaborate on edits and guide status throughout the review and approval process. This incorporates a simple wysiwyg editor.

Examples of potential comments that could be made about an overall guide include:

- "Guide passes testing"
- "I cannot find this guide in the widget"
- "This guide failed testing, see comment on Step 12"
- "We don't use Milestones, so this guide will need to have those steps removed"

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- "This guide will need to be expanded upon because we have some custom workflows"

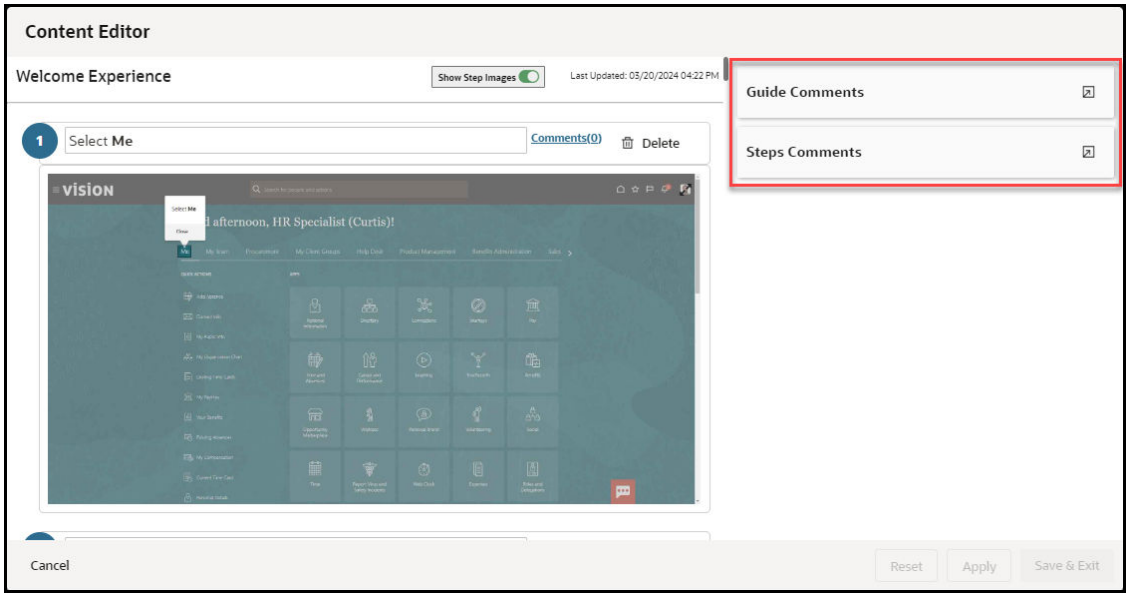
Examples of comments that might be made at the step level include:

- "Please change selector for this step to Personal Information"
- "Guide does not advance after this step"
- "Please insert a smart tip on the date field"
- "Please insert a link to the travel policy in this tip"

Comments can be added, viewed, and edited through the content editor or included when editing in the full editor.

Content Editor

The OGL Editor can now open the Content Editor for a specific guide to review and add comments. When OGL Opens the guide a comment panel will open on the right side of the screen. By default, comments are hidden. To view previously entered comments, click the **File Folder** icon to the right of the Guide Comment or Step Comment fields.



The OGL Editor has the option to view, edit, delete and add comments at the guide level or add comments for individual steps. Clicking the **Comments** button at the top right corner of a step in the the "Step Guide" opens the comments panel for that particular step.

To add a new comment the Editor enters the text in the “Write a comment” field and clicks the **Green Paper Airplane** at the end of the comment field to add the comment to the Guide or Step.

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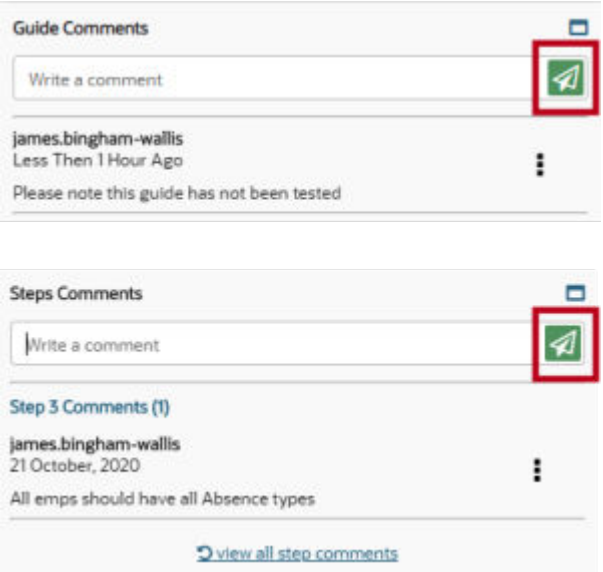
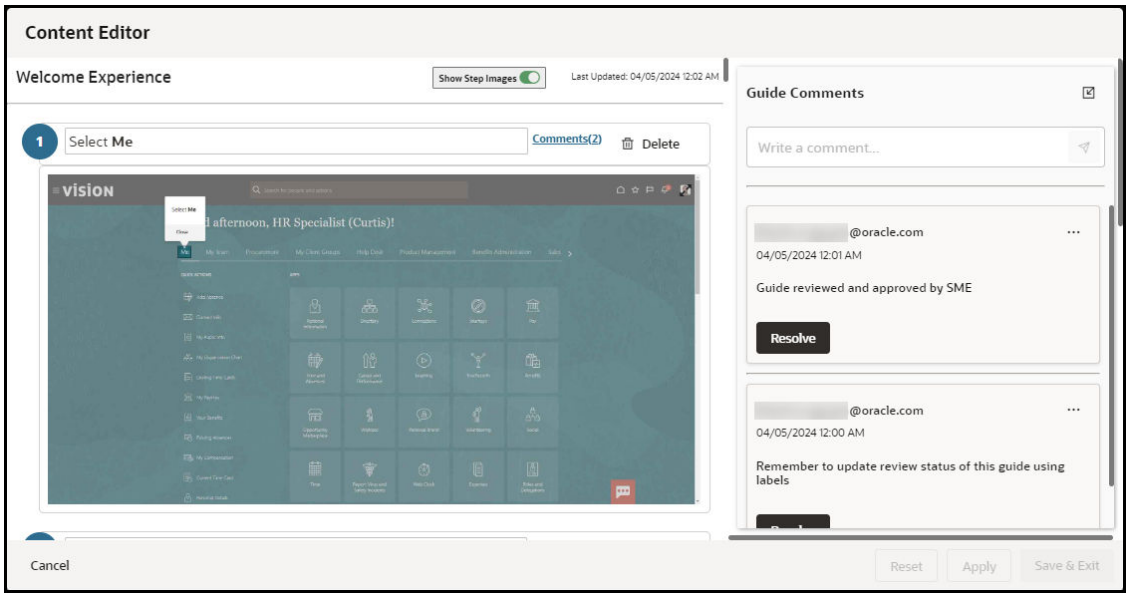


Comments are displayed in date/time order, with the newest comment at the top of the list.

OGL Editors can review all comments added to a guide from the comments panel and use the comments links to view comments related to a specific step. All comments are date, time, and user stamped.



Comments can be edited or deleted from the comments panel.

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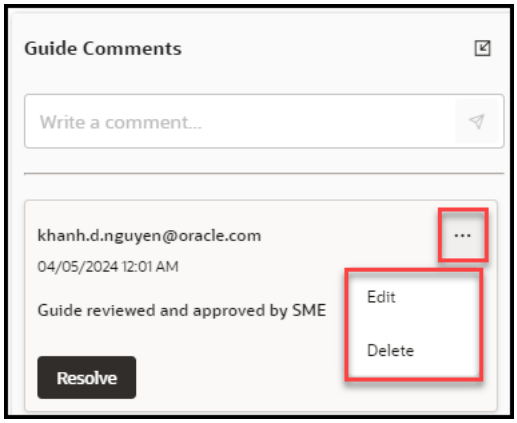
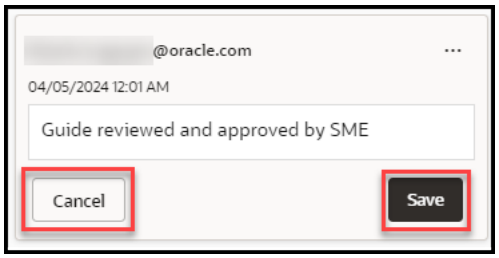
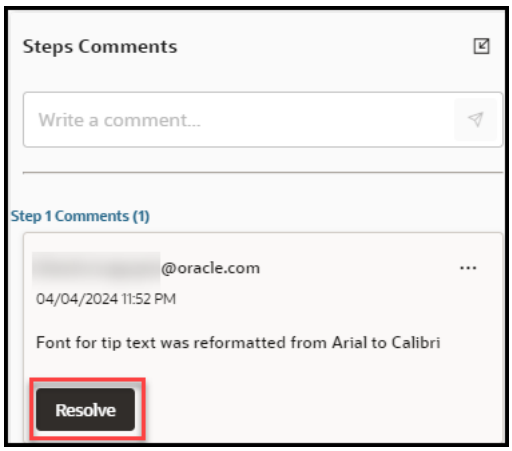


Once the update has been made to the comment, the OGL Editor clicks the **Save** button to save the change or **Cancel** to discard any changes.



To indicate that the issue noted in the guide/step comment has been resolved or that you have taken necessary action, you can select Resolve on the comment as an indication to other administrators.



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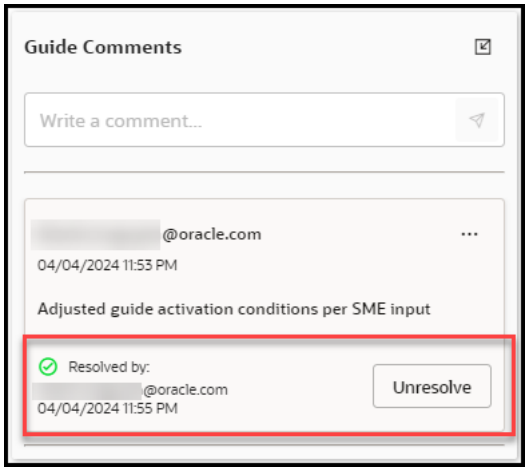

Full Editor

When an OGL Developer is working with a guide in the Full Editor, step comments are viewed, added, edited or deleted using the new comments button located directly below the text editor for a particular step. (To the right of the camera Icon) Click the comment button to open the comments panel for the selected step.

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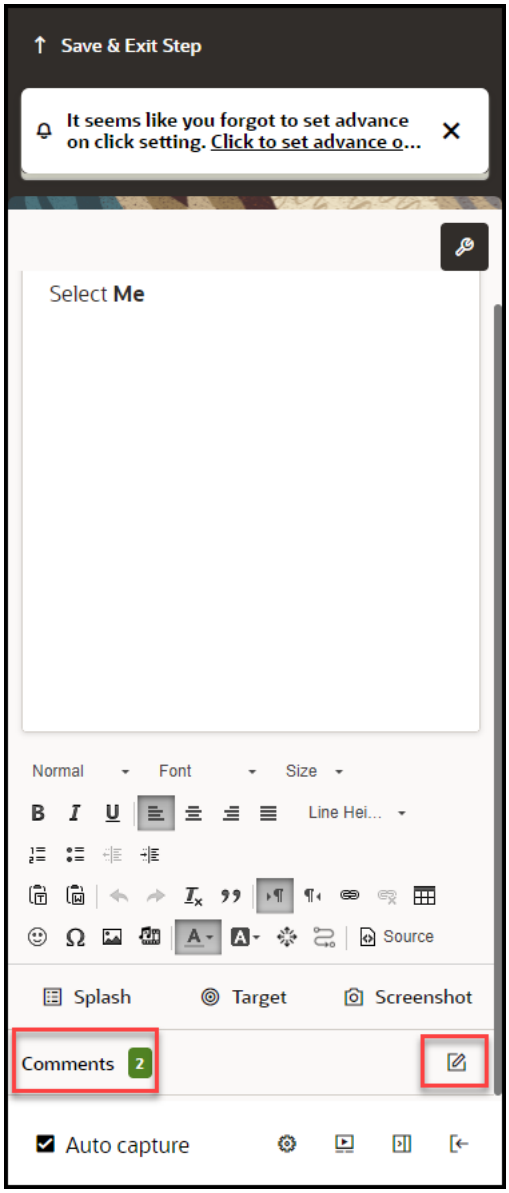

Select the **Edit Comments** button to view, add, edit or delete any Step Comments within this step.

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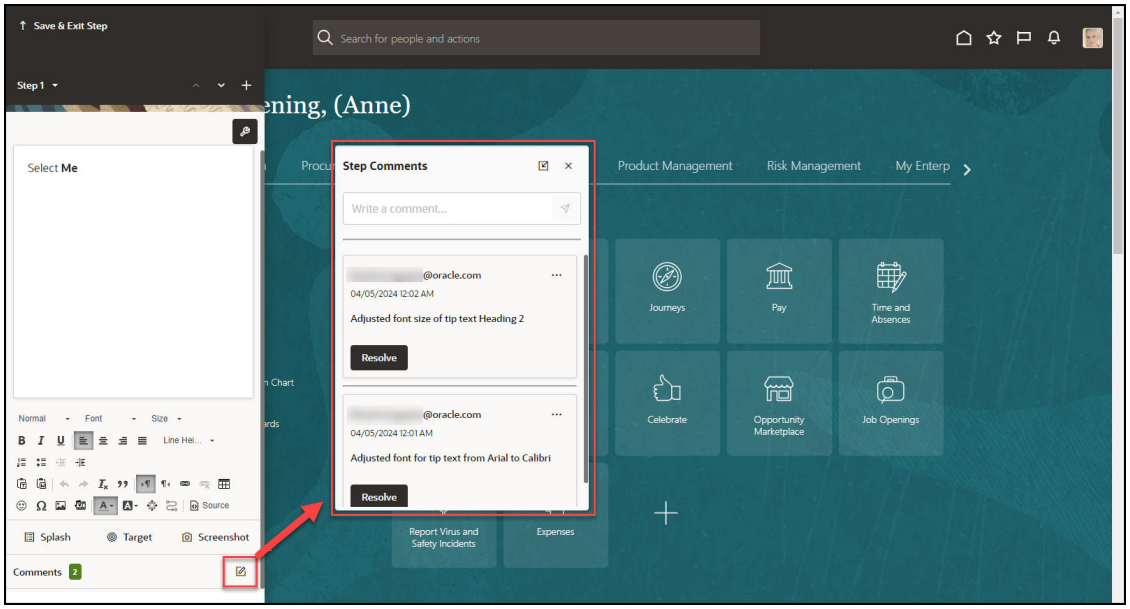
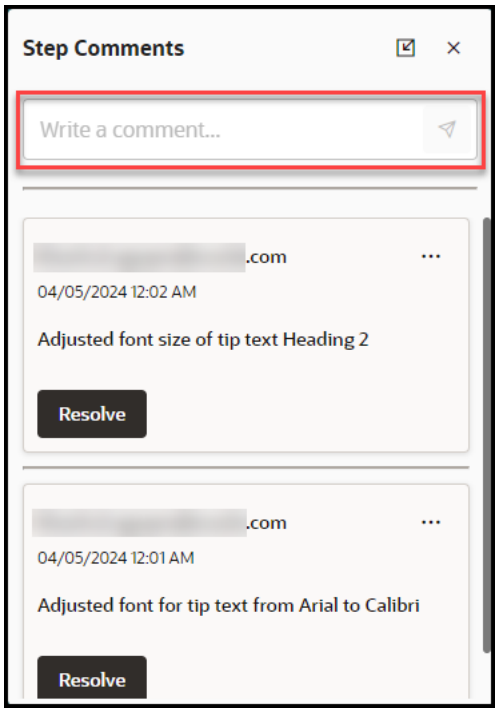


To add a new comment, enter your text in the "**Write a comment**" field and select the **Paper Airplane** button to add the comment to the step.



> **Note**
>
> If there are comments available, the **Comments** button will display the number of comments and they are highlighted in green color

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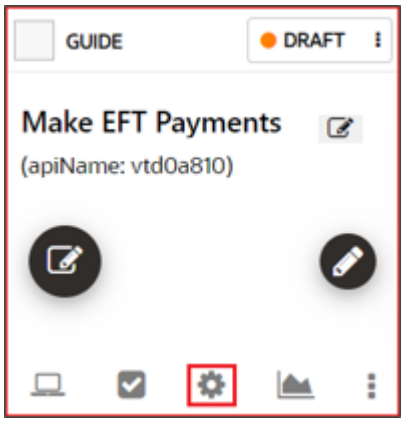
Key Points

- Comment Edit and Delete buttons are only available if the OGL developer or User has the correct permissions
- All comments show the user name of the user who added them and the date that the comment was added. If the date is today's date, then it will show the number of hours since the comment was made
- Comments can be edited and deleted by the creator of the comments
- Users with the Manage Comments permission under the Owners group can edit or delete comments
- Comments remain with the guide for the life of the guide
- Comments are copied with the guide if it is cloned
- When a tip or entire step is deleted, the comments are deleted also., even if the user does not have the Manage Comments permission
- The character limit in all comments is 512 characters
- Each comment creation field includes a character limit counter that dynamically counts down from the character maximum as the user types
- When a user deletes a comment, they are prompted with the following message: “Are you sure that you want to delete this comment?”
- If the user has not seen the guide or step comments, an indicator lets them know that new comments are available

Guide Setting Management

To access the Guide settings, select the **Settings** for the target guide.



Settings include:

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Table 4-2 Guide Settings

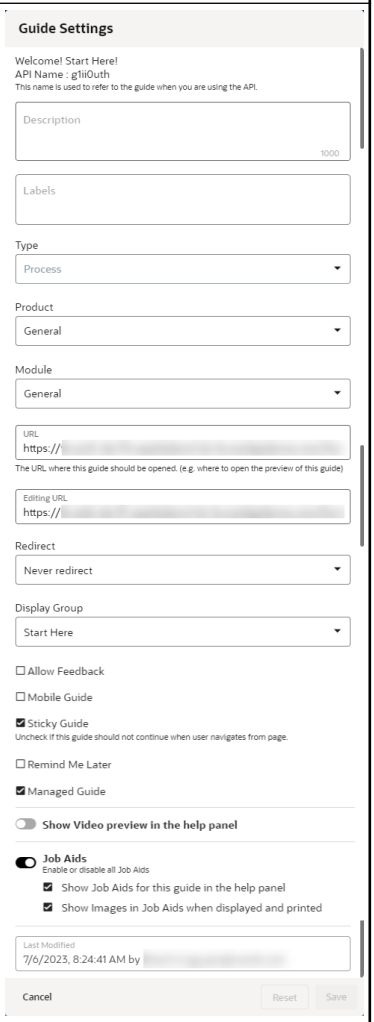
Option	Description	
API Name	A unique identifier for the guide.	
Description	Brief description of the guide. Note: The description is searchable, and you can add keywords to help your searches here.	
Labels	Allows console users to create and assign labels for use in organizing and filtering guidesaccordingly to their labels. Labels can also be created and managed as a bulk action for multiple guides.	
Type	Indicates the type of guide: Beacon, Hotspot, Launcher, Link, Message, Process, Smart Tip, Survey, Task List, Training, or Video.	
Product	Lists the available Fusion Products set up for the OGL AppID. Select the product that the guide applies to.	
Module	Lists the available Fusion Modules set up for the OGL AppID. Select the module that the guide applies to.	
URL	The URL where the guide starts. This is also where the preview will display.	
Editing URL	The page to open when editing the guide. This can be different from the URL.	
Redirect	Specifies where to begin the guide. Typically, Never Redirect, the default option, is the best choice here.	
Allow Feedback	Specifies whether the guide will prompt the end-user to provide feedback on the guide per the Feedback settings.	
Mobile Guide	Specifies whether the guide is intended to appear on mobile devices.	

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Table 4-2 (Cont.) Guide Settings

Option	Description	
Sticky Guide	A Sticky guide remains active when the user leaves the page on which the guide is running. Upon returning to the page with the last step, the guide will start up again from the last position. **Note** The Sticky Guide setting must be enabled for all Process guides to ensure that users can resume the guide from the last position if they leave the page and later return to resume the	

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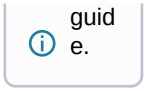
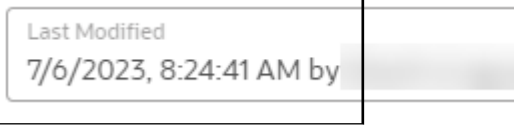
Table 4-2 (Cont.) Guide Settings

Option	Description	
		
Remind Me Later	This setting allows content developers to enable a button on the guide that allows end-users in the host application to temporarily hide auto-launched guides and to specify a time delay for the guide to re-launch at a later time that may be more convenient for user to take action (e.g., In 20 minutes, in 1 hour, in 3 hours, Tomorrow, or Next Week). **Note**: This feature can only be used on the following guide types: process, message, beacon, smart tip, and survey, and will only display on the first step of the guide.	
Managed Guide	If your organization purchased Managed Service packs along with OGL, you will work with Oracle to identify Managed Service guides. Manage Service guides are maintained by Oracle and individuals without the appropriate permissions have limited access. This setting identifies which of your guides fall into that category.	
Show Video preview in help panel	Allows you to enable a video preview option for end users to play a video recording of the guide through the help panel. (Available for Process guides only.)	
Job Aids	Allows you to determine whether Job Aids (or "Step Guides") will be available to end-users through the help panel for this guide and whether images will be displayed in the Job Aids. (Available for Process guides only.)	
Last Modified	Indicates the date, time, and username of the OGL console user to last modified the guide.	

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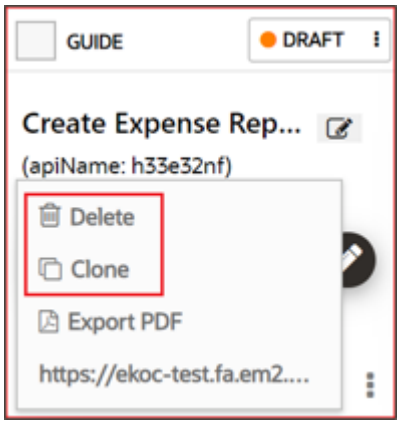
Deleting / Cloning Guides

1. Select **More** for the target guide
2. Select **Clone** to create a duplicate of the OGL item or select **Delete** to archive the item



Creating Step Guides

With the help of Step Guides, you can create a job aid from an existing Process guide which includes all guide steps and associated screenshots, where applicable. Step Guides can then be printed or emailed.

Exporting Step Guides
To create a Step Guide from an existing Process guide, follow these steps:

From any Process guide in your My Content Library,

1. Select the More
icon located at the bottom left of the guide title.

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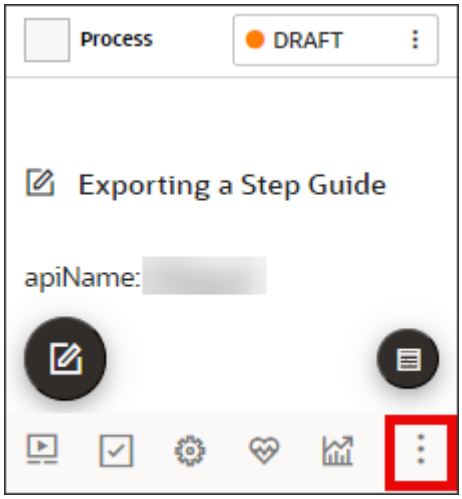
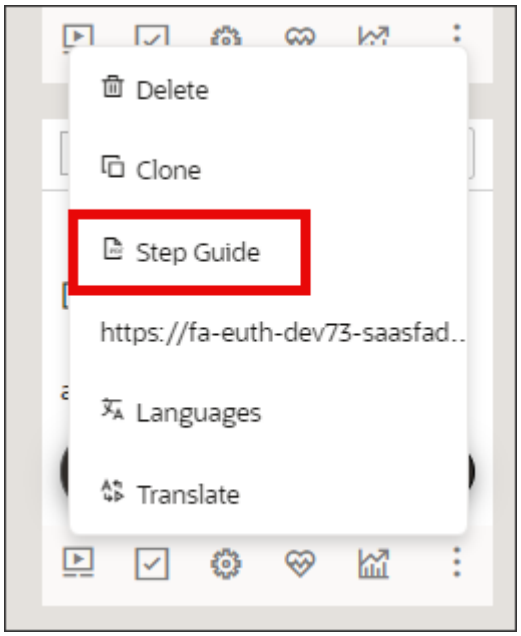


2. Select **Step Guide** from the More actions menu.



3. The Step Guide modal will open. You can select from the following options:
   a. **Show Screenshots** - Enable this setting if you want to include screenshots for each step (if available).
   b. **When Printed, print invisible steps** - Enable this setting if you want to include any invisible steps in the Step Guide.
   c. **Print** - Send the Step Guide to your available printer.
   d. **Email** - Send an email using your default email application. The email body will include a link from where the recipient can download the Step Guide.

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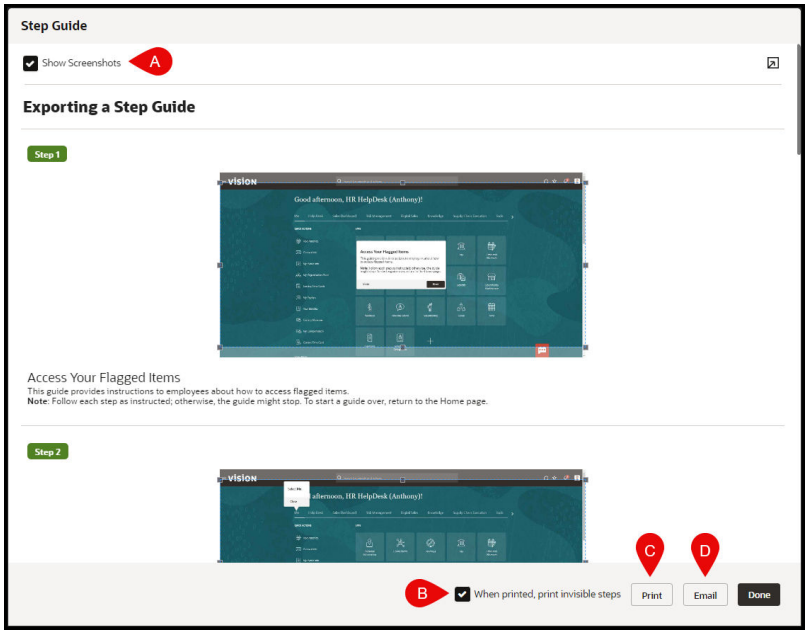


4. Select **Done**, when finished.

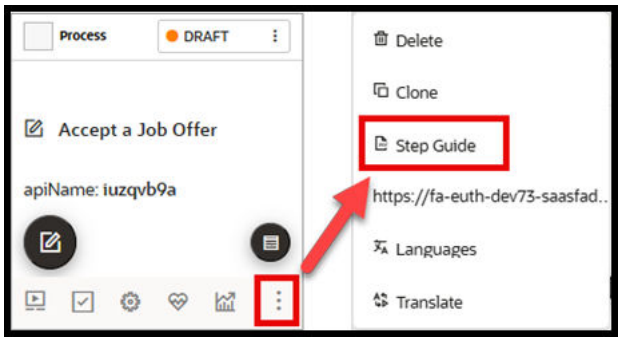
Step Guides enhancement

Step Guides can now be exported in an editable PowerPoint (.pptx) file format as opposed to the previous un-editable PDF format. This enhancement allows OGL developers and administrators to edit and format the exported Step Guide using common PowerPoint tools, such as adding text boxes, colors, and images, to enhance the Step Guide.

Exported Step Guides will also include the following guide details in the exported slides:

- Guide name
- apiName
- APPID (first slide)
- Step ID
- Description of flow (first slide)

To export a Step Guide, select the **More (…)** button on the guide tile, then select **Step Guide**.



In the Step Guide modal, select Export to download the file to your Downloads folder:

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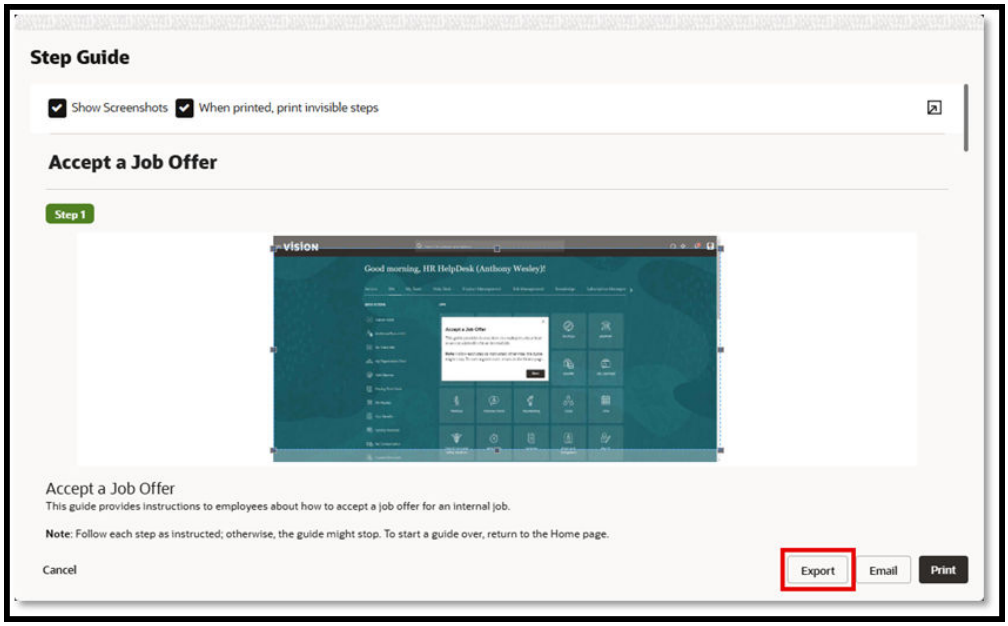
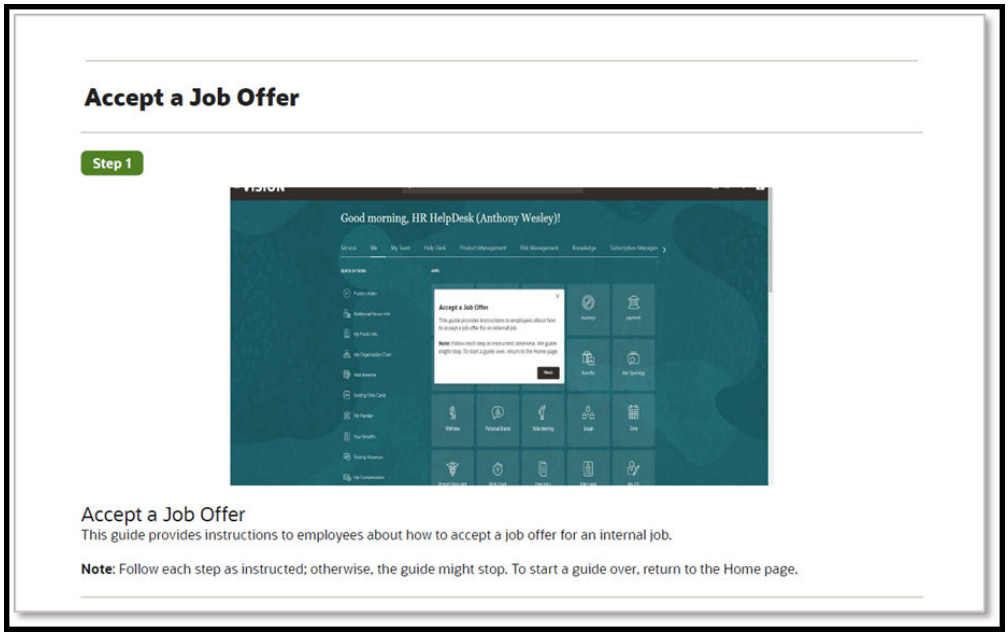


Example of legacy Step Guide export in PDF format (legacy):



Example of new Step Guide export in PPTX format (post 24D.1):

Slide 1

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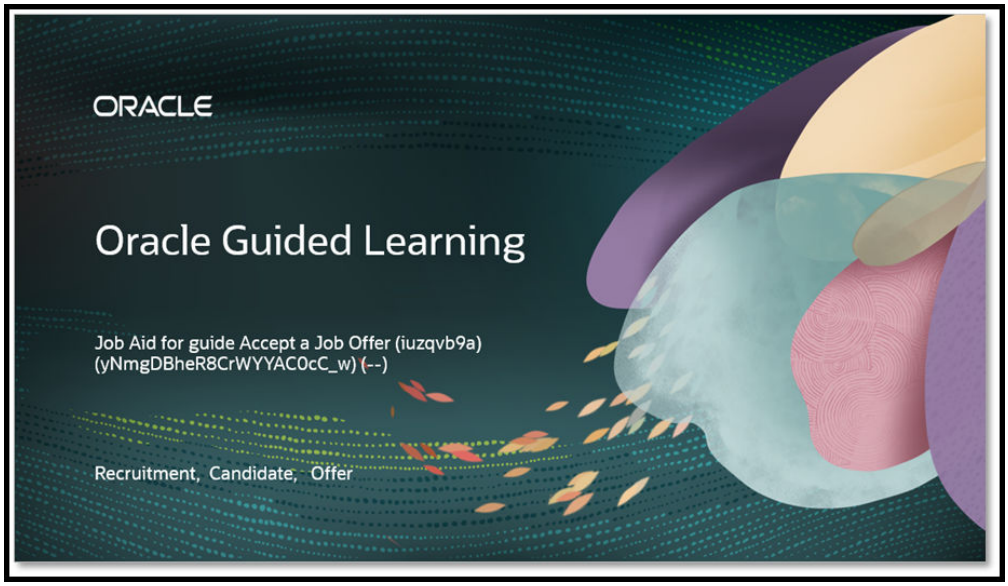
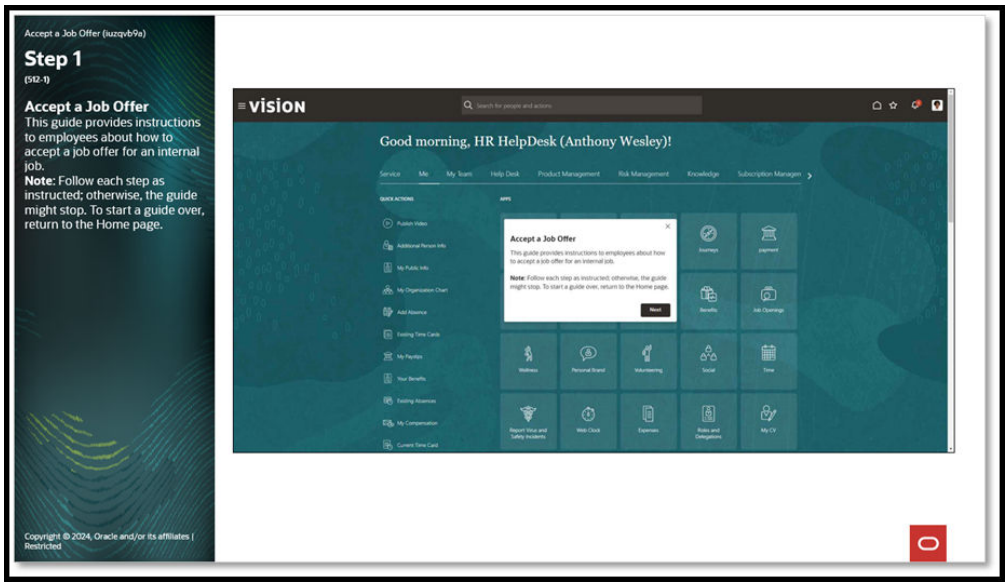


Slide 2



The Step Guide can now be edited in PowerPoint, as needed.

Retrieving Deleted Content from the Archives

To access and recover deleted content items from the archives:

1. Select **My Content** from Home page, and then select **Archive**.

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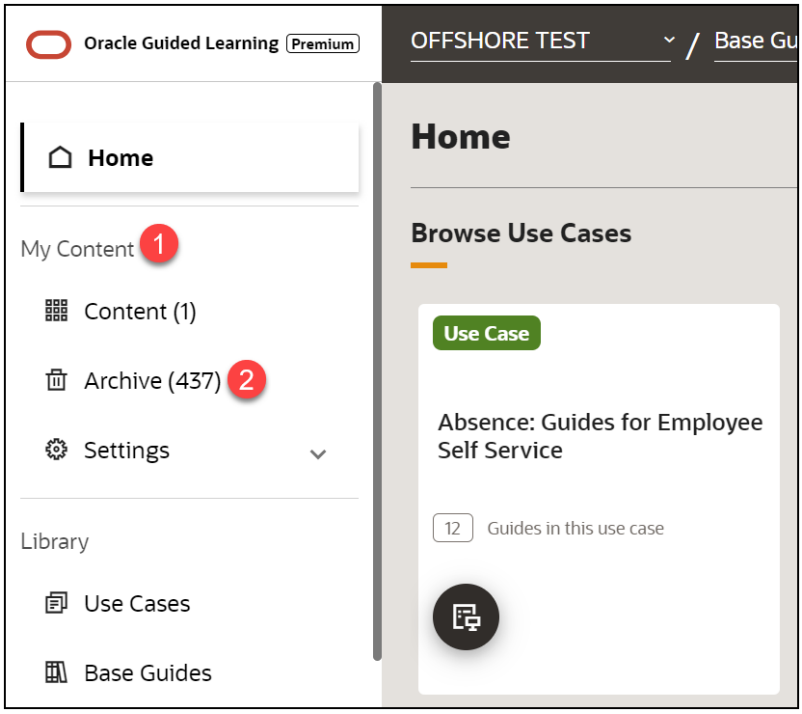
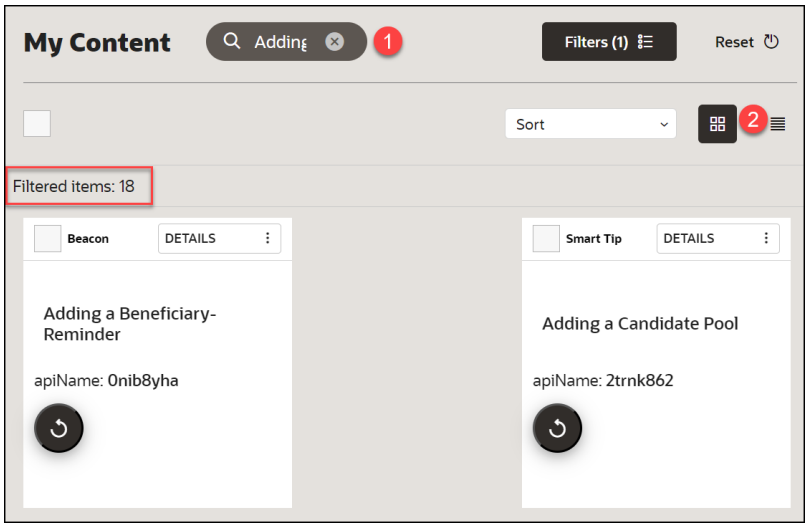


2. Locate the target guide.
Note: Use **Search** (1) and **Sort** (2), the guides are filtered and listed accordingly.



3. Select the checkbox of the target guide and click on **Recover** icon.

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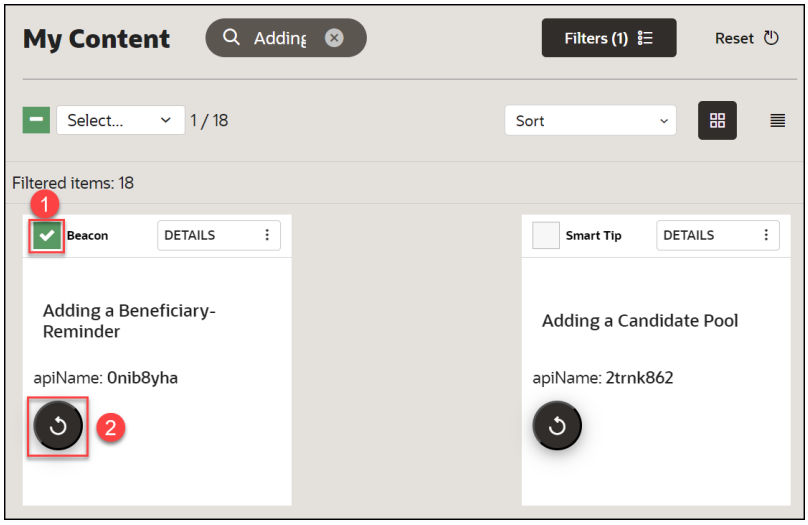
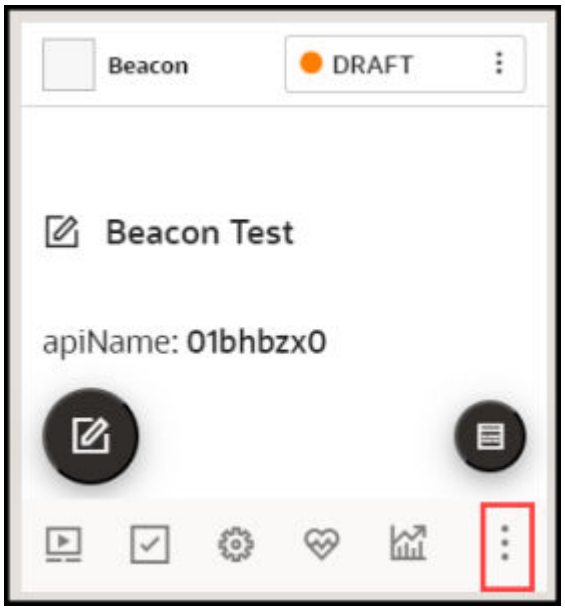


> **Note**
>
> You will get a "recovered successfully" message as a result.

PDF Export

You can Print or Email the document with the help of Job Aid. It contains the text of each step along with a screenshot of the application where the step takes place.

1. To generate a Job Aid, select **More** for the target guide.



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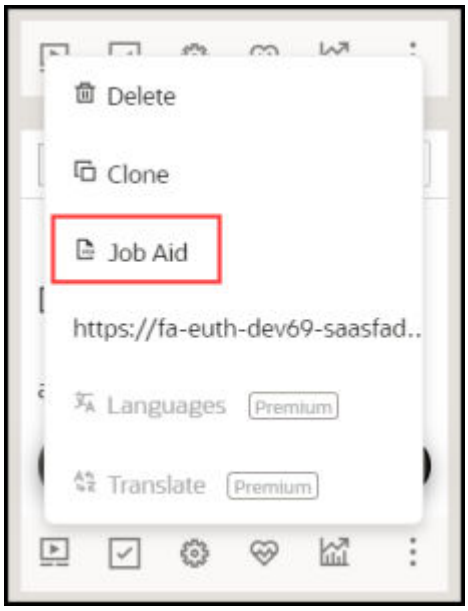
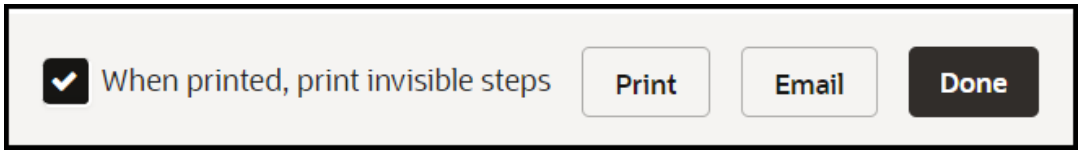
2. Select **Job Aid**.



3. Select the option to **Print** or **Email** and click **Done**.



Permalinks

Permalinks provide end users with quick access to launch a guide without having to go through the Launch Widget. These links can be embedded into an email message, knowledge base article, or LMS asset to allow end users to quickly launch a guide simply clicking the link. This link, when opened, automatically launches the guide in the host application, providing more efficiency and flexibility in distributing OGL content to end-users.

> **Note**
>
> For more information about Permalinks, refer to this OGL Knowledge Article: https://docs.oracle.com/en/education/customer-success/guided-learning/ogl-faq/tips-tricks.html#GUID0C732461-4044-4220-A010-9A85E1BB0FD0

With OGL 25B, this console enhancement allows developers to quickly view and copy a Permalink for a guide for each specified domain from within the More Actions menu on the guide tile.

Permalinks can be obtained via the modal for the following supported guide types:

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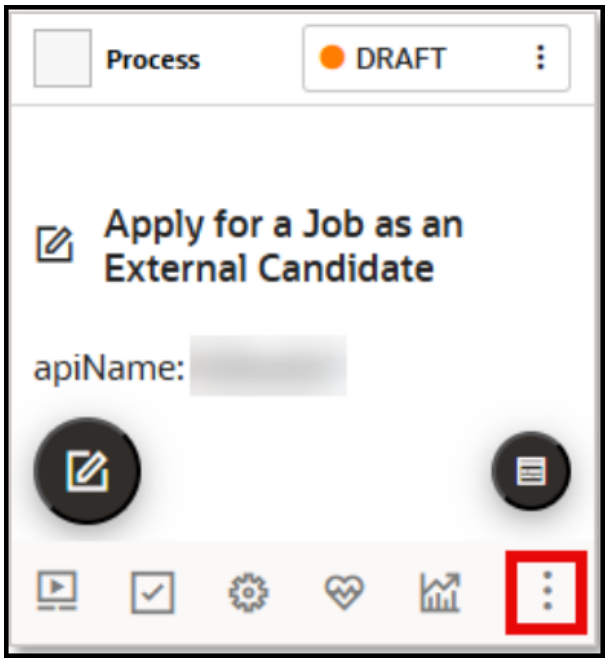
- Message
- Process
- Survey

Accessing the Permalink

1. From the My Content page, locate the guide from which to copy the Permalink.
2. Select the **More**

   button in the bottom-right of the guide tile.



3. In the More Actions menu, select **Permalink**.

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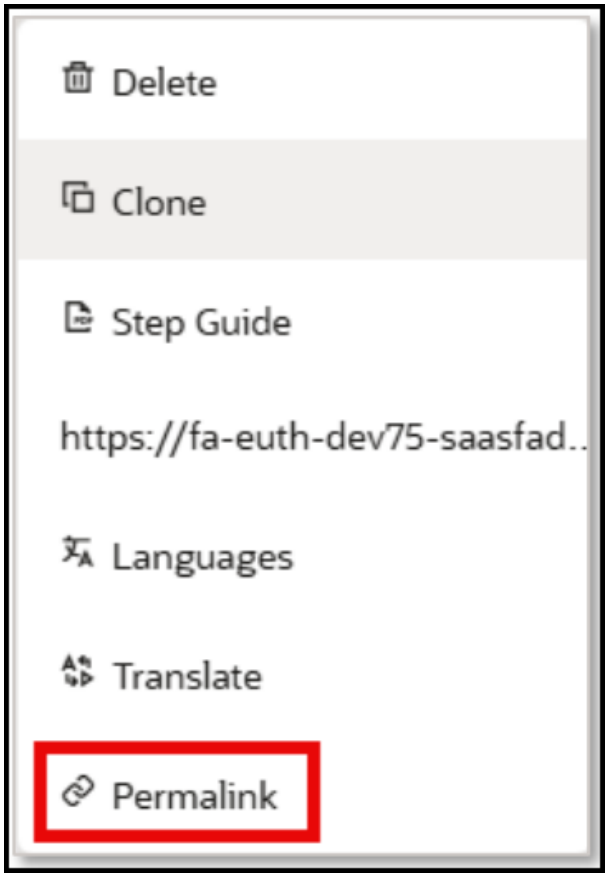
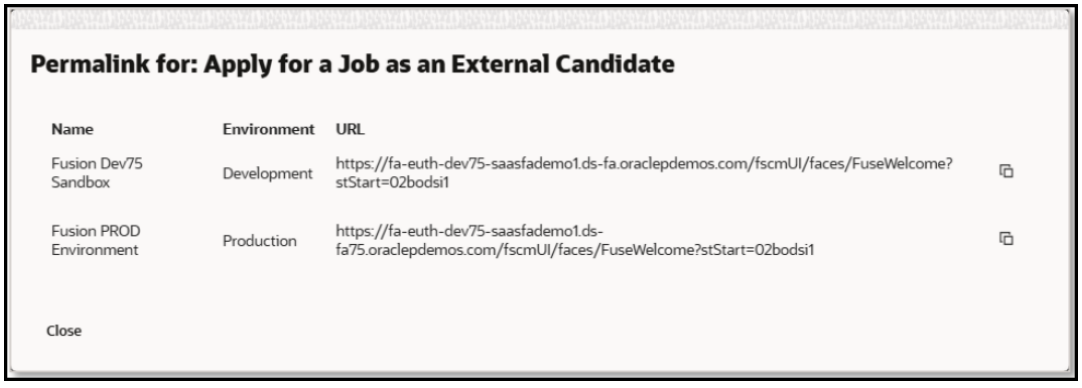


4. The Permalink modal will appear providing the Domain Name, Environment, and URL of each available Permalink.

> **Note**
>
> A separate, unique Permalink will be listed for each available Domain.

Select the Copy ( ) button to copy the Permalink to your clipboard or select the URL to open the Permalink.



5. You can now paste the Permalink into your source documentation (e.g., email template, knowledge article/document, LMS content link, etc.).

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> **Note**
>
> For the Permalink functionality to work properly, OGL must first be deployed to your host application (i.e., Fusion) and you must have your OGL Domains setup for your DEV and/or PROD environments. Permalinks areunique and specific to each guide (apiName) and domain.

Known Issues/Expected Behavior
Expected behavior:

- Signing into the Host Application:
  - For **Fusion** applications, when an end user clicks a Permalink, they will be redirected to sign in with their Fusion login credentials before launching the guide (if the user is not already logged in).
  - For **Non-Fusion** applications, the Permalink may or may not launch the guide depending upon the server configuration. As a best practice, end users should sign into the host application before attempting to access the Permalink.
- Permalinks do not recognize activation conditions assigned to the guide and can be opened by any user who opens the link, provided that they have access to the host application.
- For the Permalink to work properly, the guide must be Active and in Draft or Published status.
- Permalinks can only be obtained via the modal from the following supported guide types:
  - Message
  - Process
  - Survey
- In Fusion applications, Permalinks can only launch a guide from the home page and cannot launch to specific pages or deep links.
- For non-Fusion applications, Permalinks are dependent on the host application configuration and we recommend that you thoroughly test Permalinks in both the DEV and/or PROD environments before deploying them to end-users.

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5

OGL Console Left Panel

My Content

The **My Content** section in the left panel of the OGL Console provides an overview of all content items in the account (i.e. process guides, messages, beacons, etc.).

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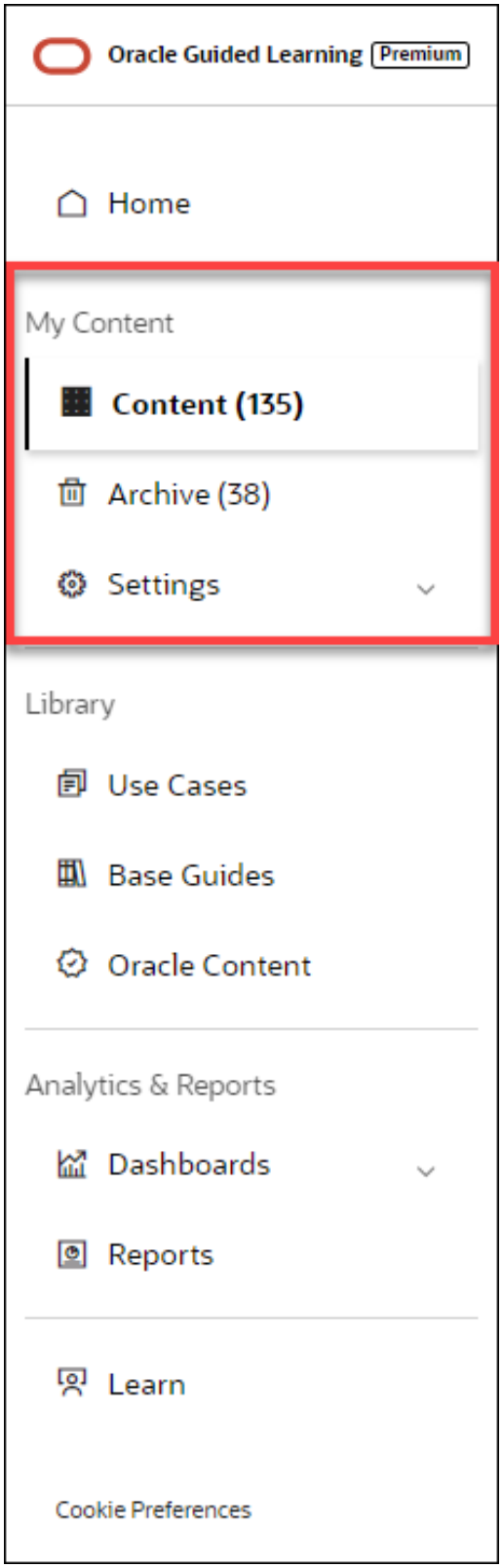

Select **Content** (1) to display all of the current content items that you have created or copied from a library, such as Use Cases. These content items will appear in the main content page to the right and will include all content items that are in Draft, Published, or Inactive status. These content items can be sorted and/or filtered to allow for more efficient browsing.

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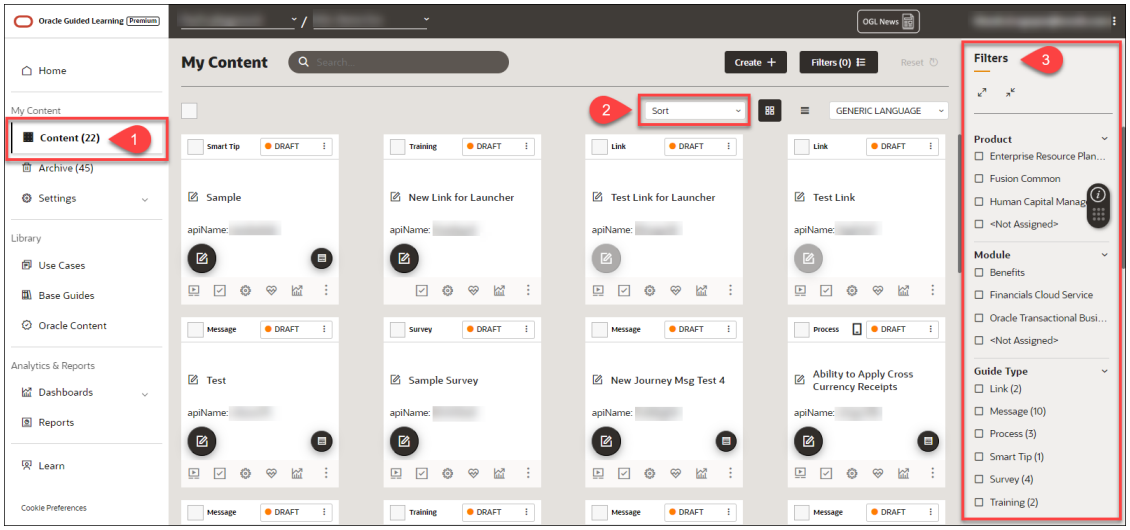
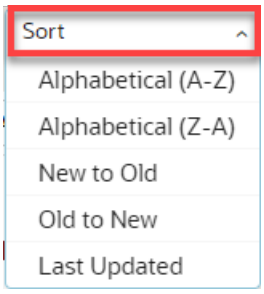


Sorting and Filtering Content Items

To sort your content items, select the **Sort** (2) dropdown menu and choose a sorting option.



To filter your content items, use the **Filters** (3) panel on the right side of the page and select from any of the available filtering categories and options to narrow the list of content items displayed.

> **Note**
>
> If the Filters panel is not displayed, be sure to activate it by selecting Filters (0) button located at the top of the My Contents page.

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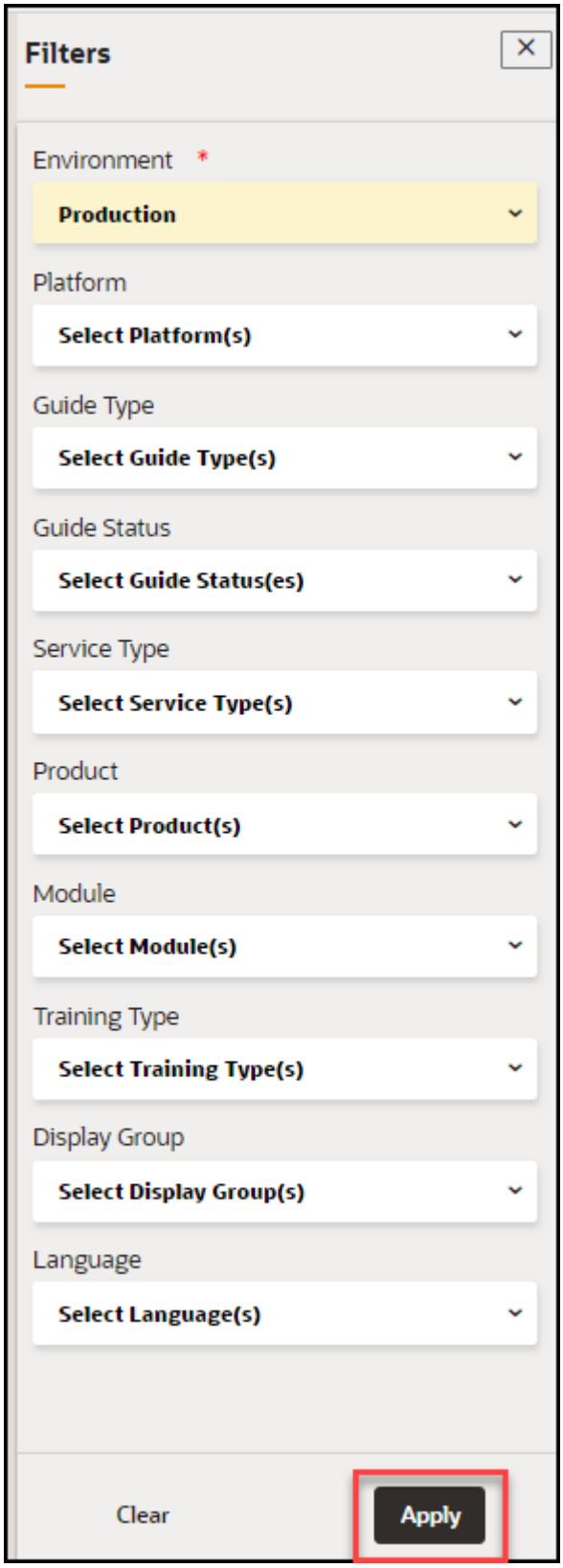

Below are all of the available categories with which you can can filter content items:

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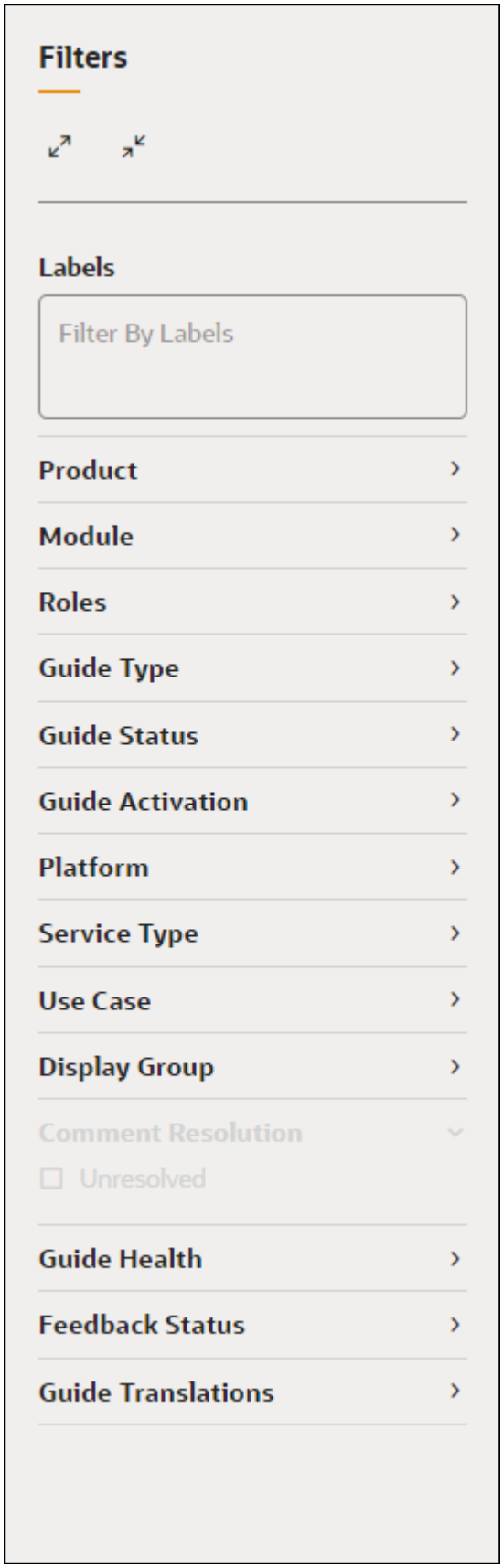

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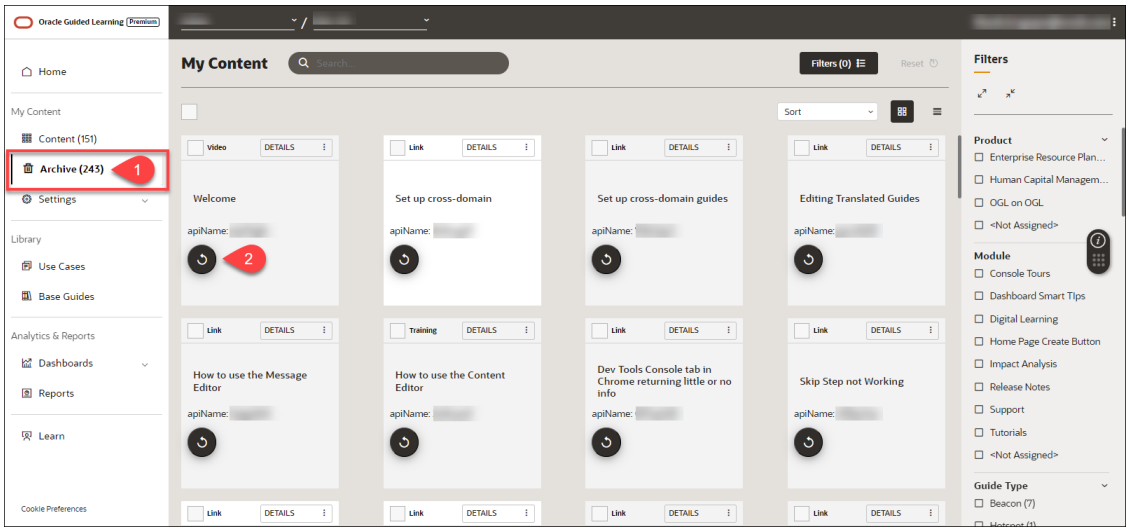
Archived Content

Content items that you delete are not permanently deleted and are simply moved to Archive.

Select **Archive** (1) to display all items that have been deleted in the account. These content items can also be sorted and filtered for more efficient browsing, as shown above.

To recover any archived items and move them back to your Content, select the **Recover** (2) button on the content item you wish to restore.



Settings

Accessing the Interface

1. On the left navigation panel, select **Settings**.

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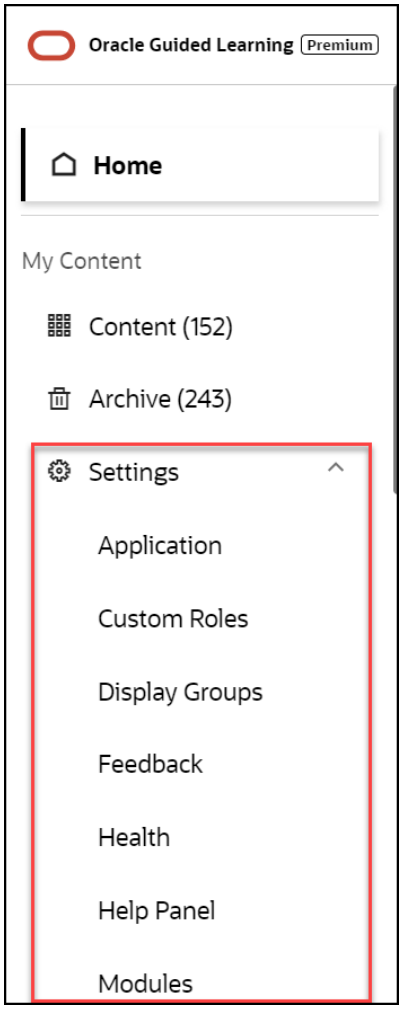

Application

Accessing the Interface

To access the Application settings modal:

1. On the OGL Console homepage, go to the left navigation panel.
2. Click on **Settings,** then select **Application.**

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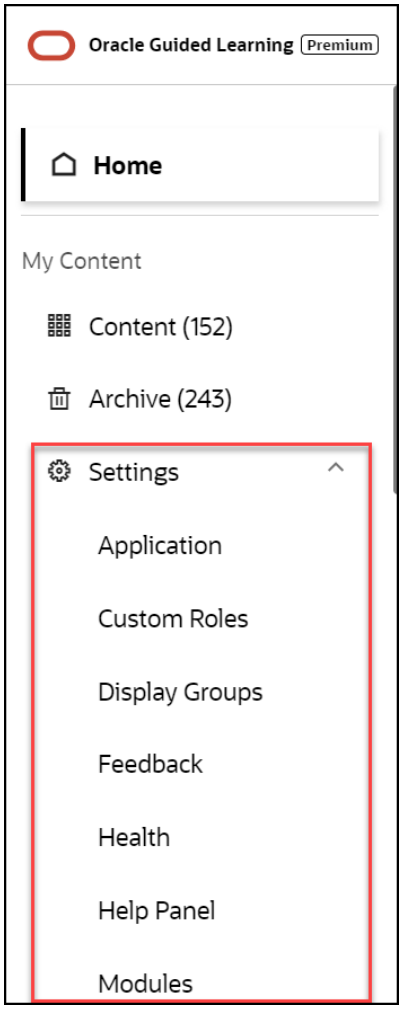

Understanding the Application Settings Interface

The Application tab:

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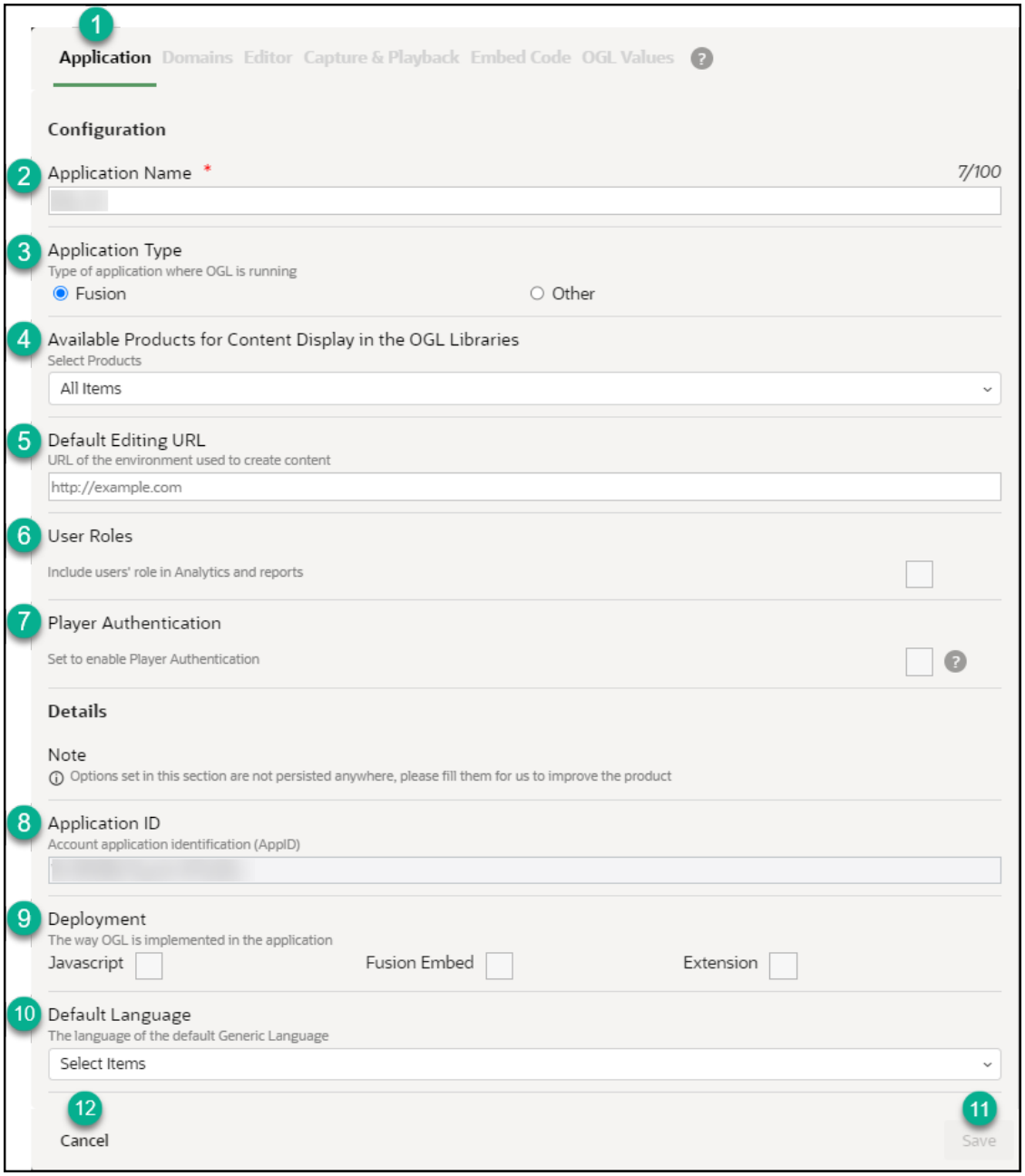
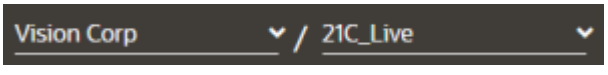


Legend	Description	Additional Information
1	Application tab	n/a
2	Application Name	This is the application name, displayed next to the account name 
3	Application type	Fusion = This appID is linked to a Fusion application Other = Any application that is not Fusion (i.e. Salesforce)
4	Available Products for Content Display in the OGL Libraries	The products selected in this list will determine which content items will display in the content libraries, including Uses Cases, Base Guides, and Business Process Training libraries.

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Legend	Description	Additional Information
5	Default Editing URL	This is the default editing URL for new item creation. Note, setting the URL in this field does not replace/update the editing URL for existing items.
6	User Roles	Indicates if the user roles are being collected by OGL for reporting in analytics. To have identifiable usernames enabled for your organization (subject to legal requirements being met), please create a service request on My Oracle Support.
7	Player Authentication	This setting allows administrators to restrict OGL content to only display for end-users who are properly authenticated in the host application. If enabled, end-users must be authenticated in the host application in order to see OGL content.
8	Application ID	This is the unique application ID for the account.
9	Deployment	Indicates OGL deployment methods. Please select only the applicable options for the appID

Note

For NetSuite applications, enabling this setting may cause a Content Security Policy (CSP) error and the OGL launch widget will not display.

Note

For Player Authentication to be properly enabled on your OGL account, a one-time configuration will need to be performed by the OGL product team to connect your OGL account to your organization's Single Sign-On (SSO). This configuration allows OGL to validate whether end-users have been properly authenticated by your SSO before displaying any OGL content, including the Widget. To request player authentication to be configured with your organization's SSO, please contact your Oracle account manager or reach out to OGL Support to submit a service request for "Player Authentication Setup".

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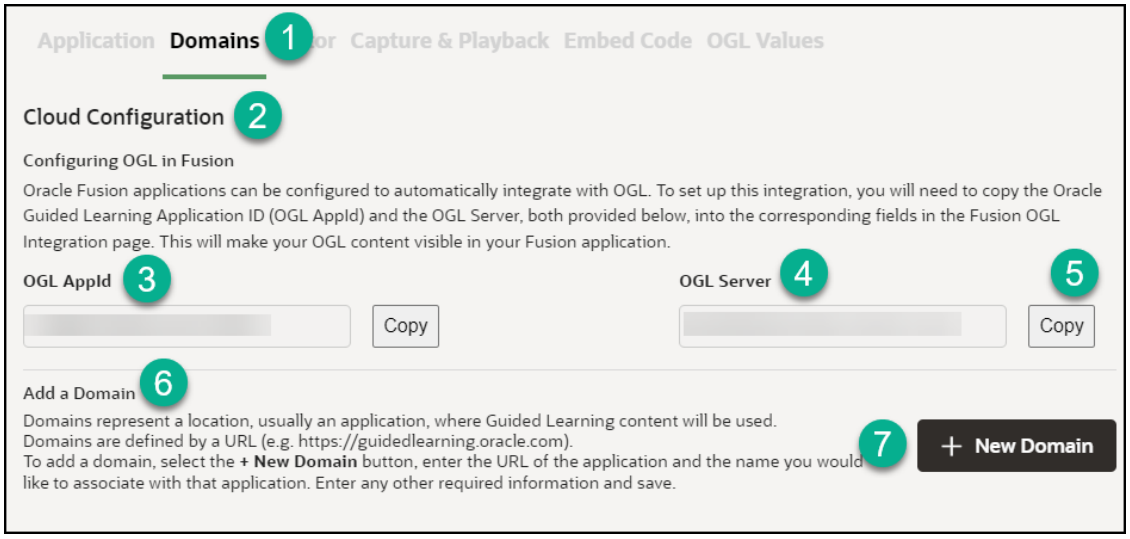
Legend	Description	Additional Information
10	Default Language	Indicates the set default language for the appID. (i.e. if the default content language is French, and French has been selected in the field, this indicates to OGL that French = Generic Language (fr = --)) Note: This is not the language of the OGL Console, but that that of the content items in the application
11	Save button	Allows you to save the changes made to the configuration. Note: The Save action applies to the Application, Editor, and Playback tabs. The Save button on the Domains tab only applies to that and not the previously mentioned tabs

The Domains tab - General



Legend	Description	Additional Information
1	Domains tab	The Domains tab contains OGL configuration settings for Fusion.
2	Configuring OGL in Fusion	Description: Oracle Fusion applications can be configured to automatically integrate with OGL. To set up this integration, you will need to copy the Oracle Guided Learning Application ID (OGL AppId) and the OGL Server URL, both provided below, into the corresponding fields in the Fusion OGL Integration page. This will make your OGL content visible in your Fusion application.
3	OGL App ID	Identifies the application ID for use in OGL configuration, enter the ID into the Application ID field in Fusion
4	OGL Server URL	Identifies the server URL for the application ID, enter the URL into the relevant field in Fusion
5	Copy button	Allows you to easily copy the application ID or the server URL to the clipboard.

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Legend	Description	Additional Information
6	Add a Domain	Domains represent a location, usually an application, where Guided Learning content will be used. Domains are defined by a URL (e.g. https://guidedlearning.oracle.com). To add a domain, select the + New Domain button, enter the URL of the application and the name you would like to associate with that application. Enter any other required information and save.
7	New Domain button	Allows you to define a new domain where OGL will be enabled
8	Hosts section	If there are domains defined, they will all be listed in the hosts' section in the Domains tab

The Domains tab - Add/Edit a Domain

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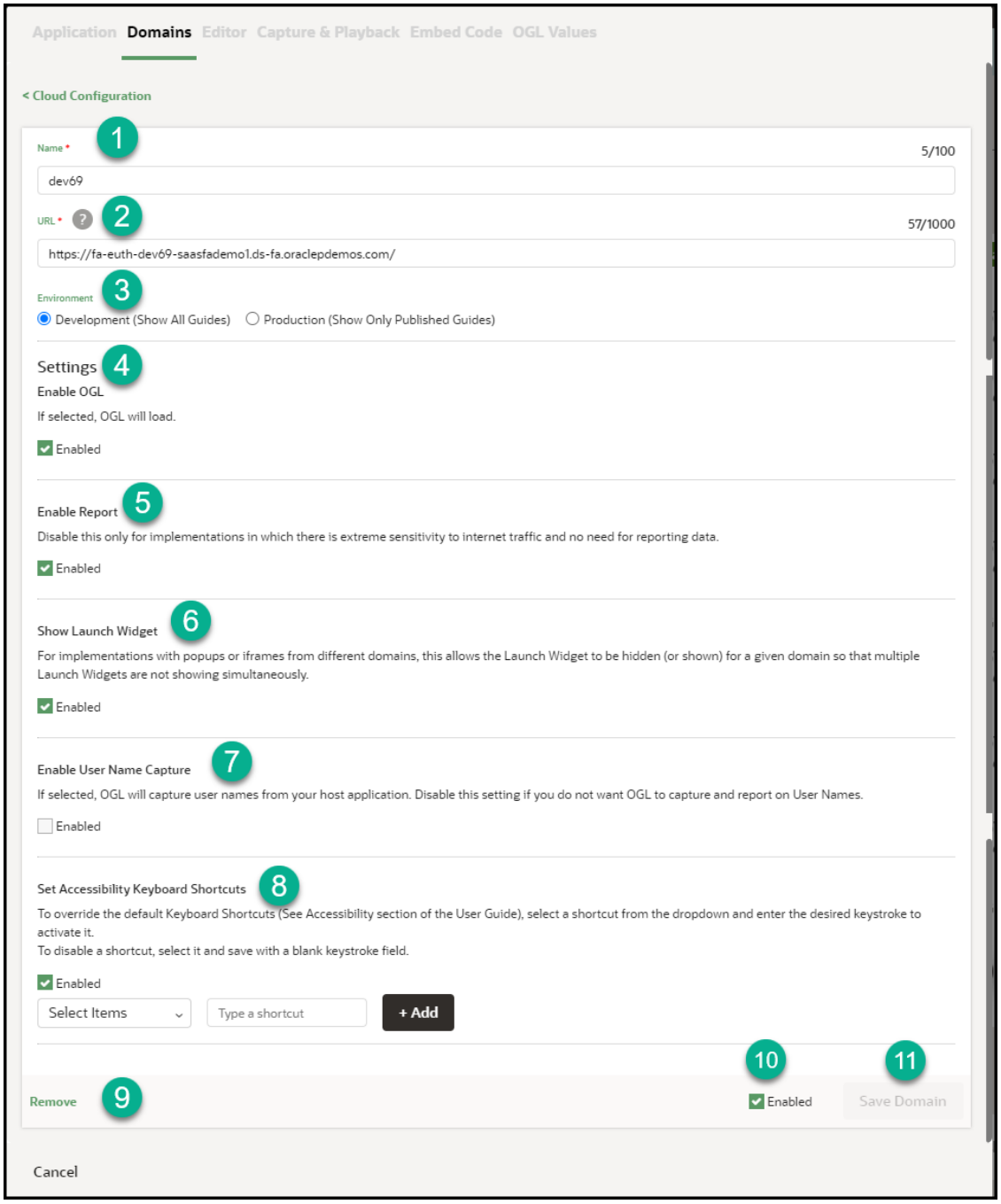

Table 5-1 Domains General Tab

Legend	Description	Additional Information
1	Name	Defines the name of the domain (.i.e. Development / Testing / User Acceptence Testing / Production)
2	URL	Identifies the domain URL (i.e. www.myapp-uat.com)
3	Environment	Determines if OGL will show in Development mode (shows all guides) or Production mode (shows published guides only)
4	Settings - Enable OGL	Determines if OGL will be enabled/disabled for the domain.

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Table 5-1 (Cont.) Domains General Tab

Legend	Description	Additional Information
5	Settings - Enable Report	Determines if analytics reporting is enabled/disabled for the domain. Disable this only for implementations in which there is extreme sensitivity to internet traffic and no need for reporting data.
6	Settings - Show Launch Widget	Determines if the OGL help Widget will be shown on the domain or hidden. For implementations with popups or iframes from different domains, this allows the Launch Widget to be hidden (or shown) for a given domain so that multiple Launch Widgets are not showing simultaneously.
7	Enable User Name Capture	Determines whether OGL will capture user names from the host application to be displayed in analytics and reports. **Note** Please check with your regional/ local user privacy laws and/or regulations and your organization's policies on user privacy before enabling this setting.
8	Set Accessibility Shortcuts	To override the default Keyboard Shortcuts (See Accessibility section of the User Guide), select a shortcut from the dropdown and enter the desired keystroke to activate it.To disable a shortcut, select it and save it with a blank keystroke field.
9	Remove	Removes the domain and associated settings
10	Enabled	Determines if the domain is enabled/disabled
11	Save Domain	Saves the domain configuration **Note** The Save Domain button only applies to the domains tab. The Save action on the Application, Editor, and Playback tabs applies only to the Application, Editor, and Playback tabs.

Note

The screen below indicates that there is a lack of sufficient privileges to Edit Cloud Configuration, request your OGL Admin for access or to make the necessary updates

The Editor tab:

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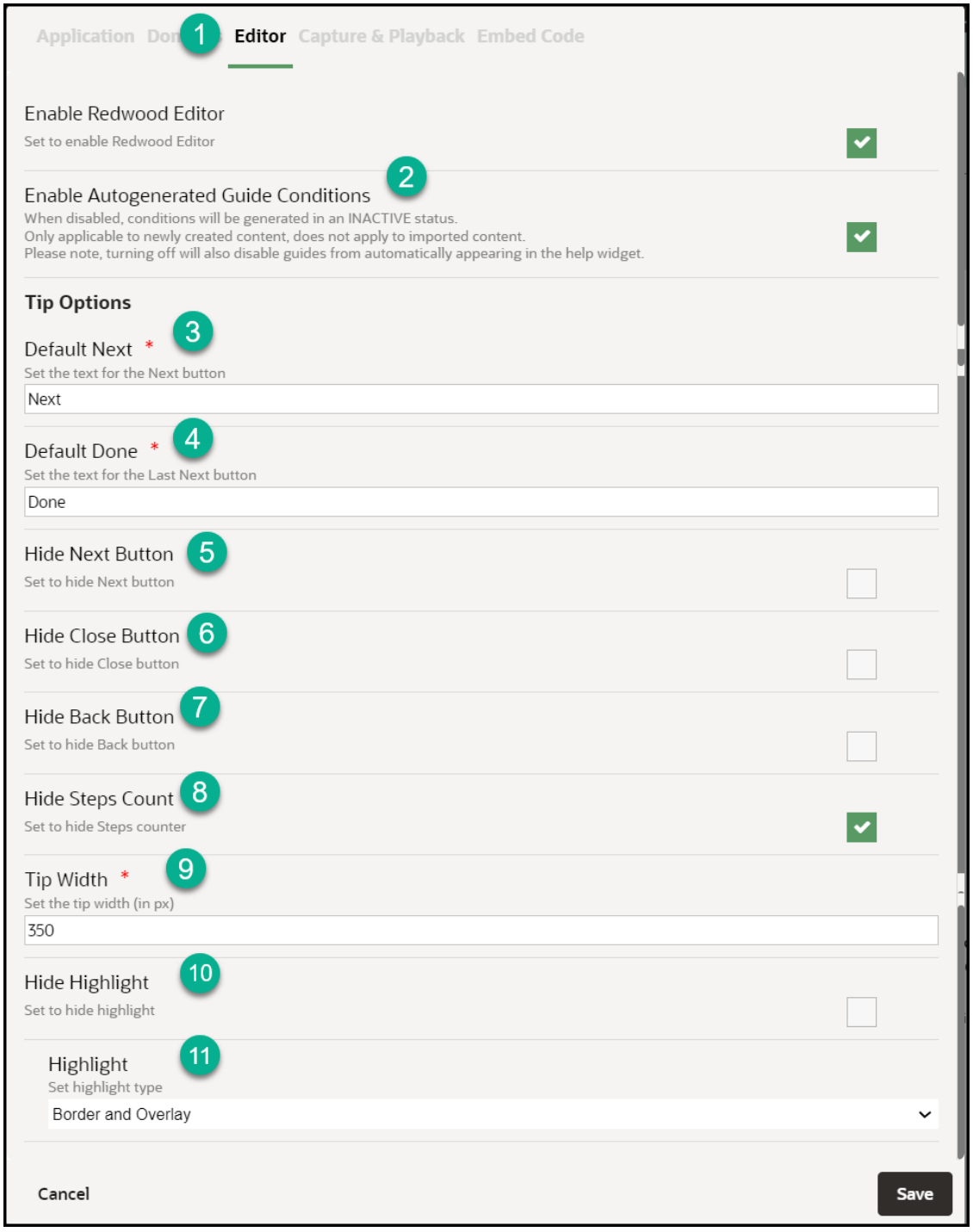

Legend	Description	Additional Information
1	Editor tab	The Editor tab contains settings that can be set for the editor at the application level. You can override these settings at item level through the OGL Full Editor. Note: Set these preferences per your governance and style guide.

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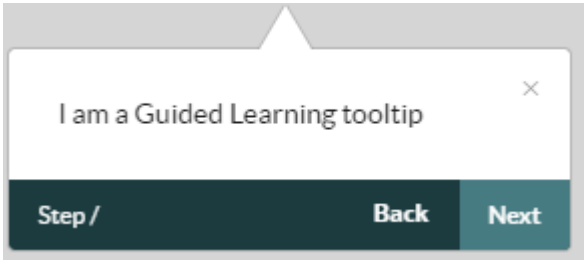
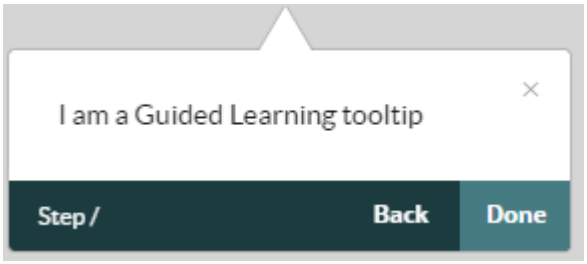
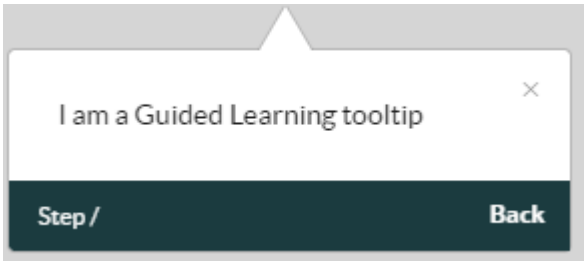
Legend	Description	Additional Information
2	Enable Auto Generated Guide Conditions	When disabled, conditions will be generated in Inactive status. This is applicable to only newly created content and does not apply to imported content. **Note** Turning off this option will also disable guides from automatically appearing in the help widget.
3	Next Button Text	Sets the custom text to display for Next button (i.e. Proceed / OK) 
4	Last Next Button Text	Sets the custom text to display on the button on the last step of the guide (i.e. Close / Finish!) 
5	Hide Next Button	Sets the Next button to hidden by default. 

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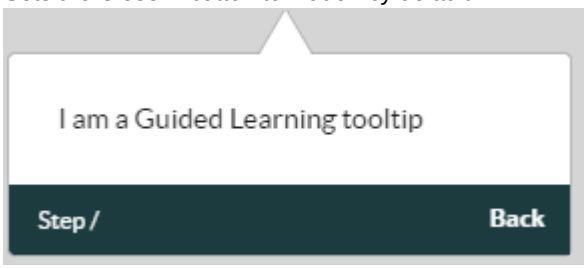
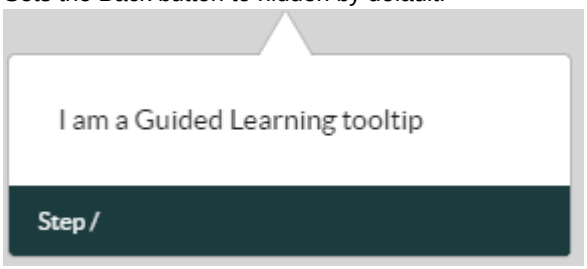
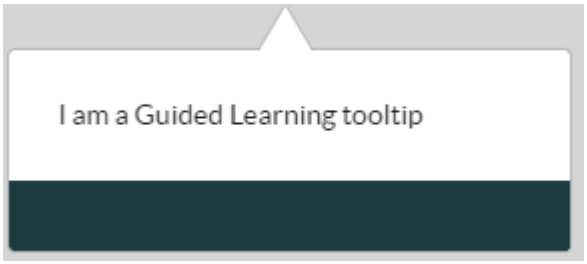
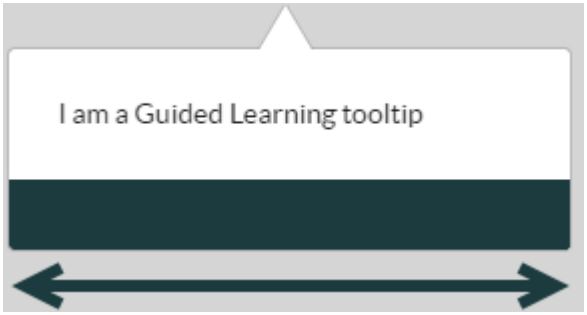
Legend	Description	Additional Information
6	Hide Close Button	Sets the Close **X** button to hidden by default. 
7	Hide back Button	Sets the Back button to hidden by default. 
8	Hide Steps Count	Sets the Step Count label to hidden by default. 
9	Tip Width	Sets the default Tip Width in pixels (i.e. 280. 

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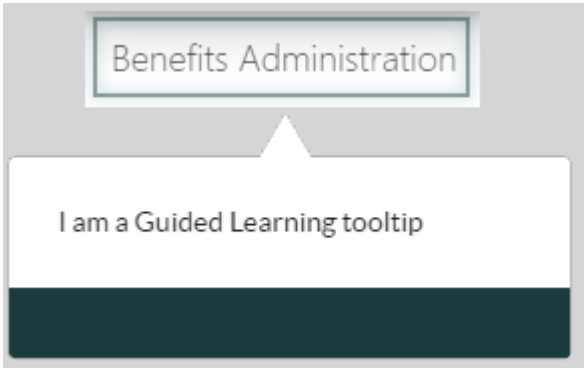
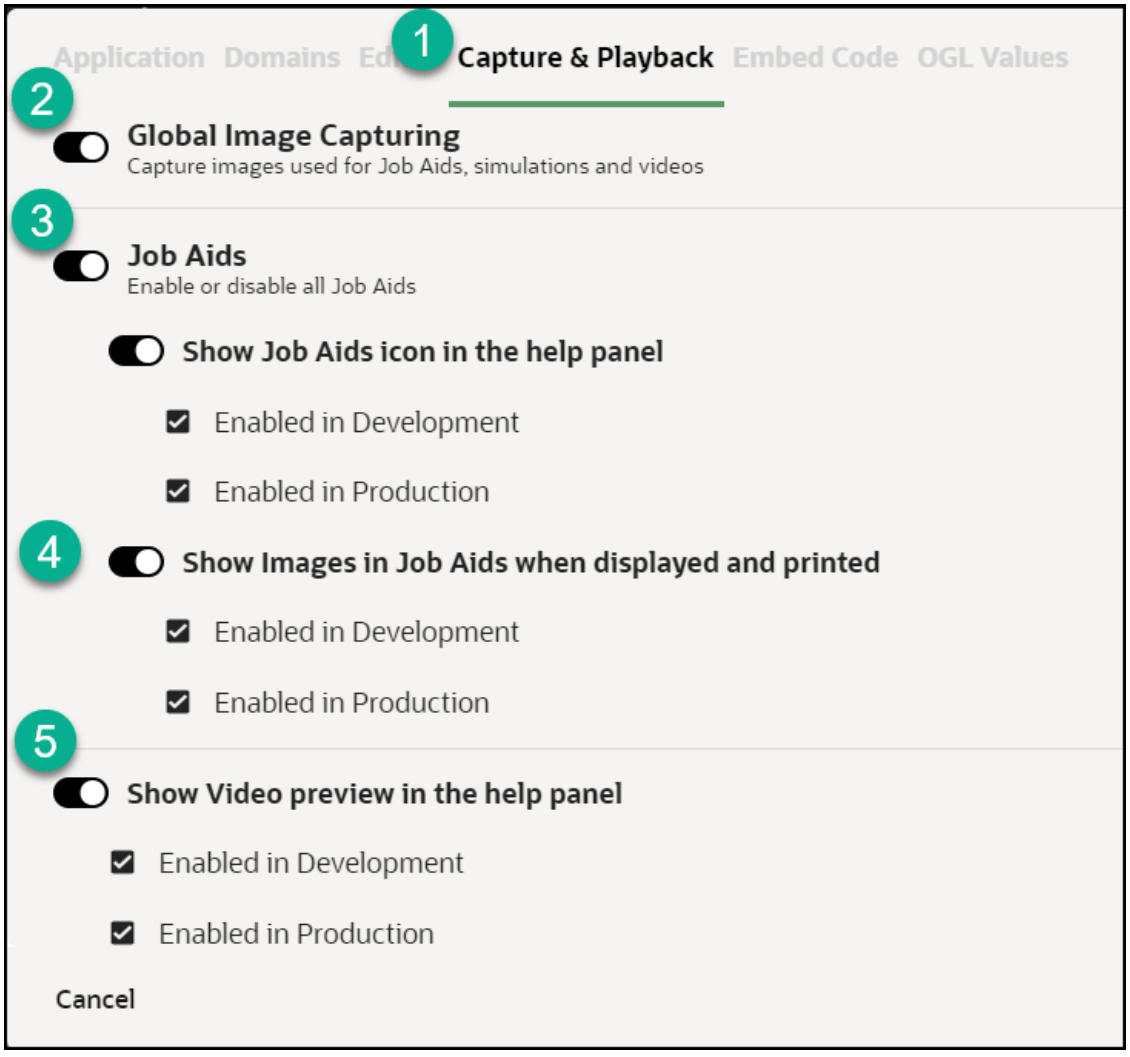
Legend	Description	Additional Information
10	Hide Highlight	Sets the default Highlight setting for all item tooltips to Hidden. 
11	Highlight	Sets the Highlight for tooltips, available options are: • Border and Overlay • Border • Overlay

The Playback tab:



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Legend	Description	Additional Information
1	Playback tab	The Playback tab contains the OGL Help Widget settings for both development and production. **Note** Development would have the same settings as Production by default, in case you need different settings in Development, override the Production settings. If you change only Production settings that would be defaulted to Development as well.
2	Global Image Capturing	Enable or disable the Global Image Capturing which helps in capturing the images used for Job Aids, Simulations and Videos.
3	Job Aids (Development/ Production)	Enable or disable the job aids (step guide) icon in the help widget.
4	Show Images (Production)	Display images in step guides (if step guide is enabled) and in PDF files or in guide export.
5	Step Guide (Development/ Production)	Display video presentations (video preview of a guide) in job aids (if job aids is enabled) and in guide export.

The Embed Code tab:

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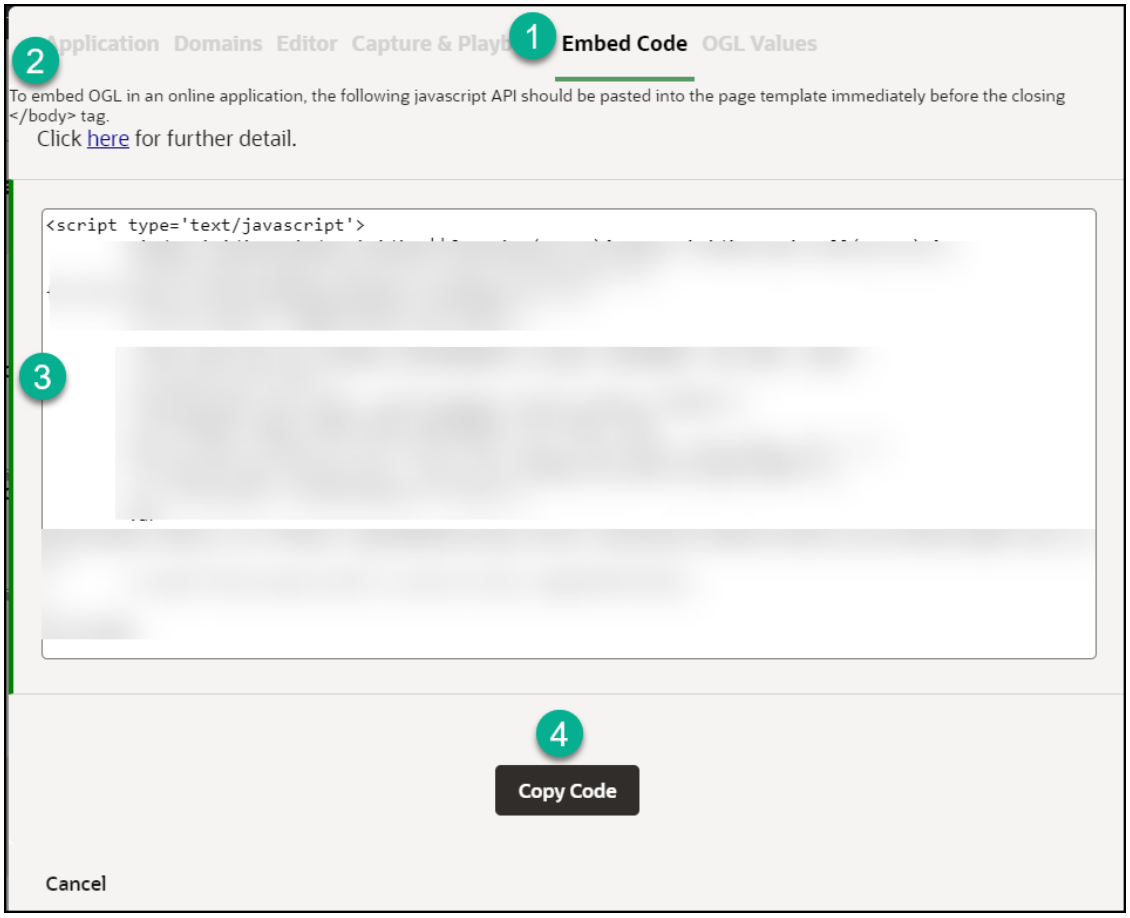

Legend	Description	Additional Information
1	Embed Code tab	n/a
2	JavaScript API Documentation Reference	https://docs.oracle.com/en/education/oracle-university/guided-learning/ogl-faq/administration.html#GUID-9059C5AB-B0D4-4A0B-B049-28B6274AD54C
3	Guided Learning JavaScript Embed Code	n/a
4	Copy Code	n/a

Custom Roles

To work with Simple Conditions, OGL now utilizes the **Custom Roles** setting in the OGL console. The OGL roles **must** be set up as per the roles set in your OGL Fusion embed or Javascript.

Click here to download a list of Role mappings.

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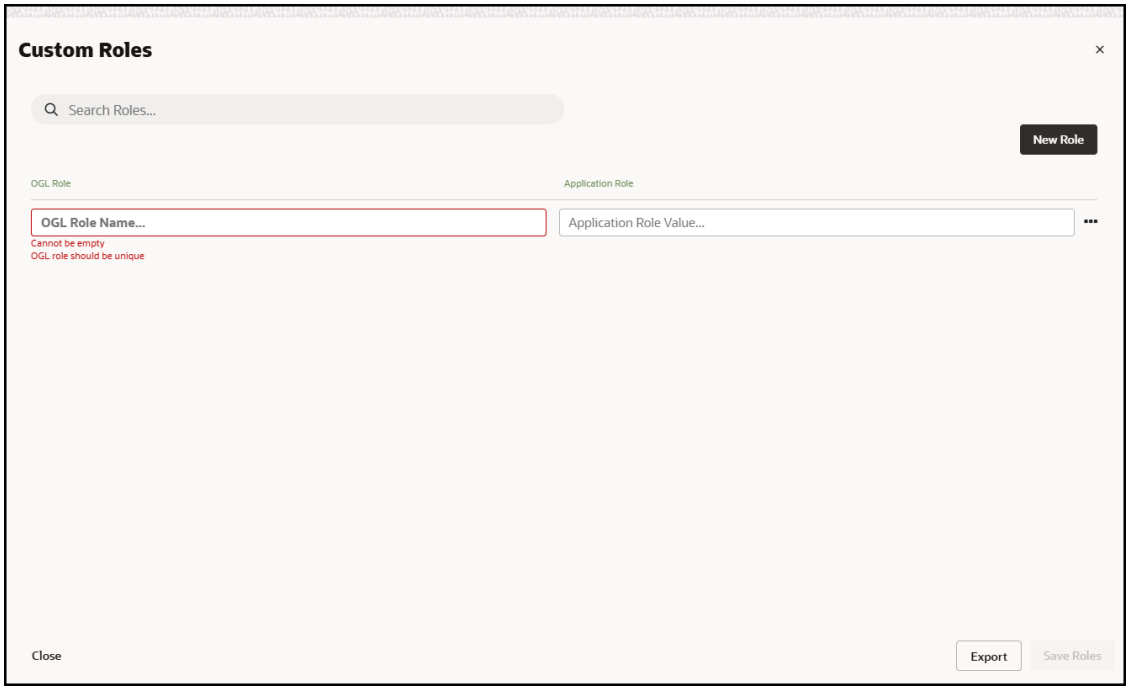
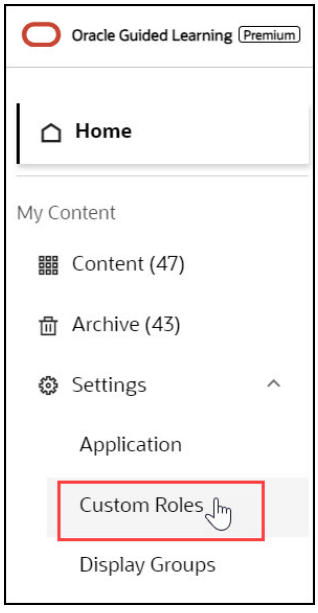


In the **OGL Role Name** field, enter the Role Name.

In the **Application Role Value** field, enter the Role Value.

Accessing the Interface

1. Go to the OGL console.
2. On the Main Navigation Menu, select **Settings > Custom Roles**.



The **Custom Roles** interface is now displayed.

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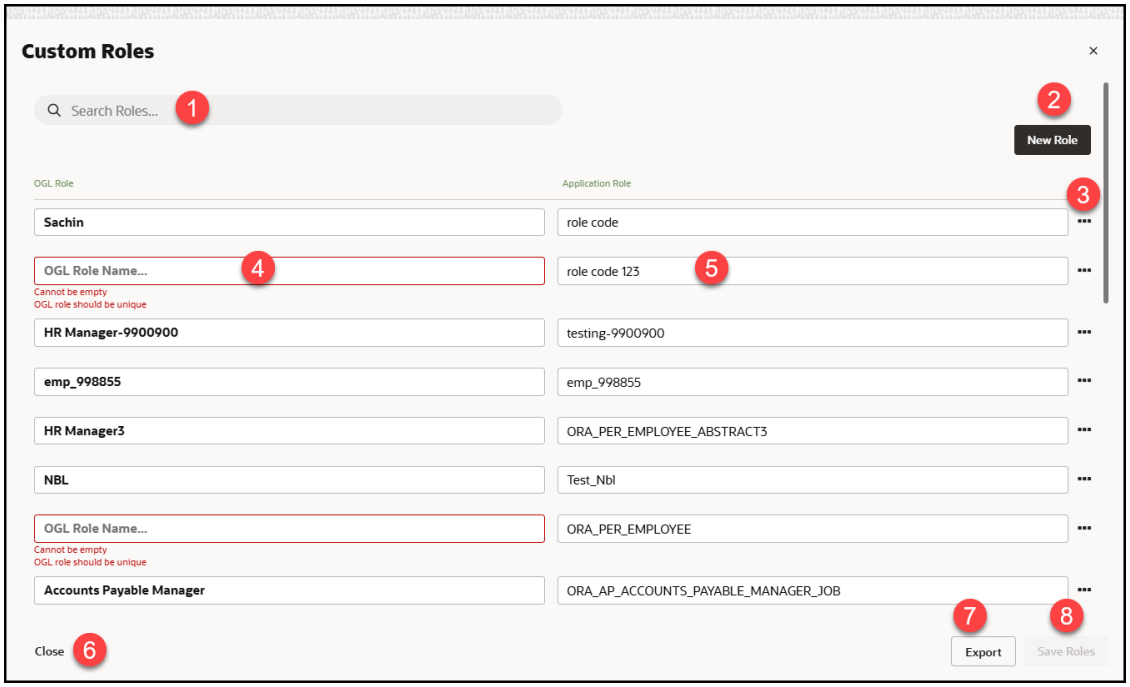
Understanding the Interface



Legend	Name	Comments
1	Search Box	Provides dynamic search functionality.
2	New Role button	Adds a new empty line to the list.

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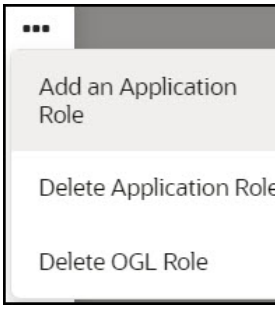
Legend	Name	Comments
3	Ellipsis Icon	Gives further Custom Roles management options.  • Select **Add an Application Role** to add multiple **Application Role Values** for the same OGL Role. • Select **Delete Application Role** to delete an **Application Role Value**.

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Legend	Name	Comments
		• Select **Delete OGL Role** to delete an **OGL Role** along with all its **Application Role Values**.

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Legend	Name	Comments
4	OGL Role Name field	In the **OGL Role Name** field, enter the Role Name. (This is the Role name for your role and will be displayed in the item activation condition.)

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Legend	Name	Comments

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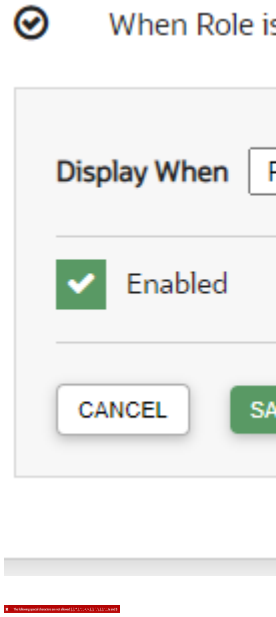
Legend	Name	Comments
		

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Legend	Name	Comments
5	Application Role Value field	In the **Application Role Value** field, enter the Role Value. (This is the value of the role as defined in your OGL JavaScript, OGL Custom JavaScript for Fusion Embed, or in the OGL Standard Roles table.)

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Legend	Name	Comments

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Legend	Name	Comments
		Lets say your JavaScript (including Custom) contains lines similar to the ones below: if(#{securityContext.userInRole['**ORA_PER_EMPLOYEE_ABSTRACT**']}){ user_role+='|**emp**|'; **ORA_PER_EMPLOYEE_ABSTRACT** is the role code in Fusion, **emp** is the OGL reference for that role code, and
		Lets say your JavaScript (including Custom) contains lines similar to the ones below: if(#{securityContext.userInRole['**ORA_PER_EMPLOYEE_ABSTRACT**']}){ user_role+='|**emp**|'; **ORA_PER_EMPLOYEE_ABSTRACT** is the role code in Fusion, **emp** is the OGL reference for that role code, and

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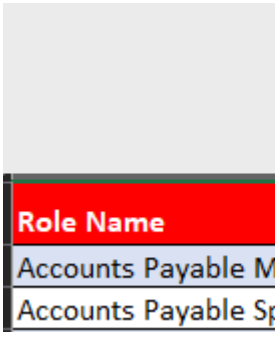
Legend	Name	Comments
		becomes the value you enter in the value field in the User Roles interface. If you have set up role mapping in Fusion Embed and have used the spreadsheet provided in the link above, then when defining roles, please enter the values in column D for your corresponding list of roles set up in Fusion Embed. 
6	Close	Select **Close** to close this confirmation dialog.

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Legend	Name	Comments
7	Export	Select **Export** to export the custom roles to an excel sheet.
8	Save Roles	Saves the changes made to the field. The **Save**button only becomes active when an acceptable value is entered in the field.

Display Groups

Categorize and order the content in the Help Widget quickly and easily with the Display Group Manager.

Accessing the Interface

1. On the OGL Console homepage, go to the left navigation panel.
   You can see the **Settings** section in the navigation panel.
2. Select the **Display Groups** from the dropdown menu.

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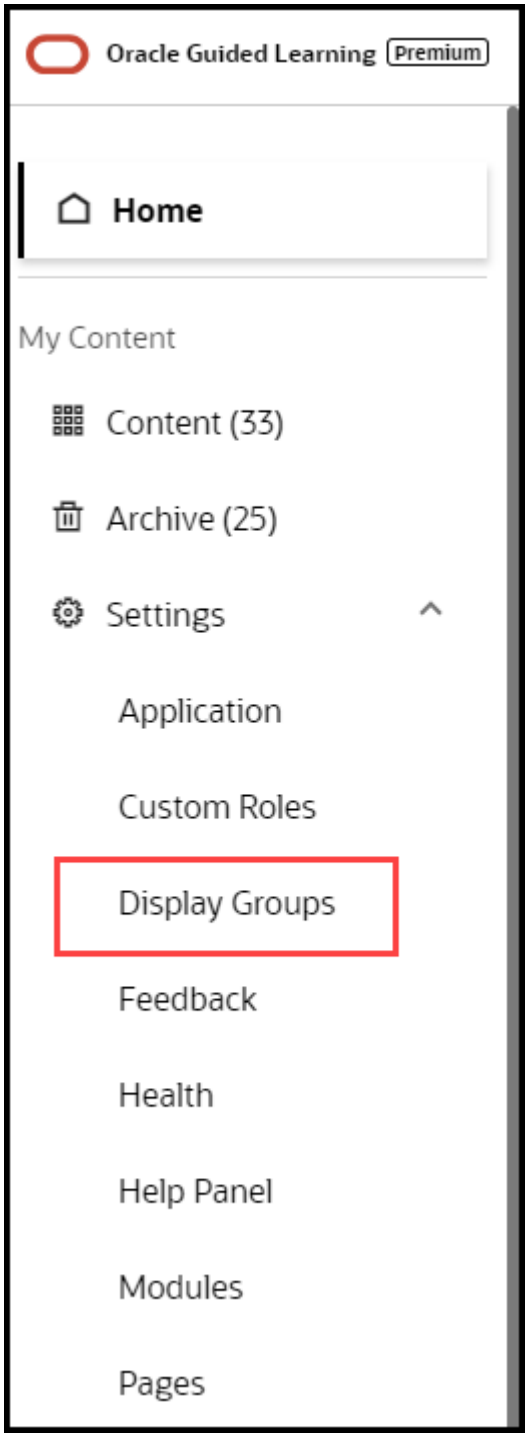

Understanding the Interface

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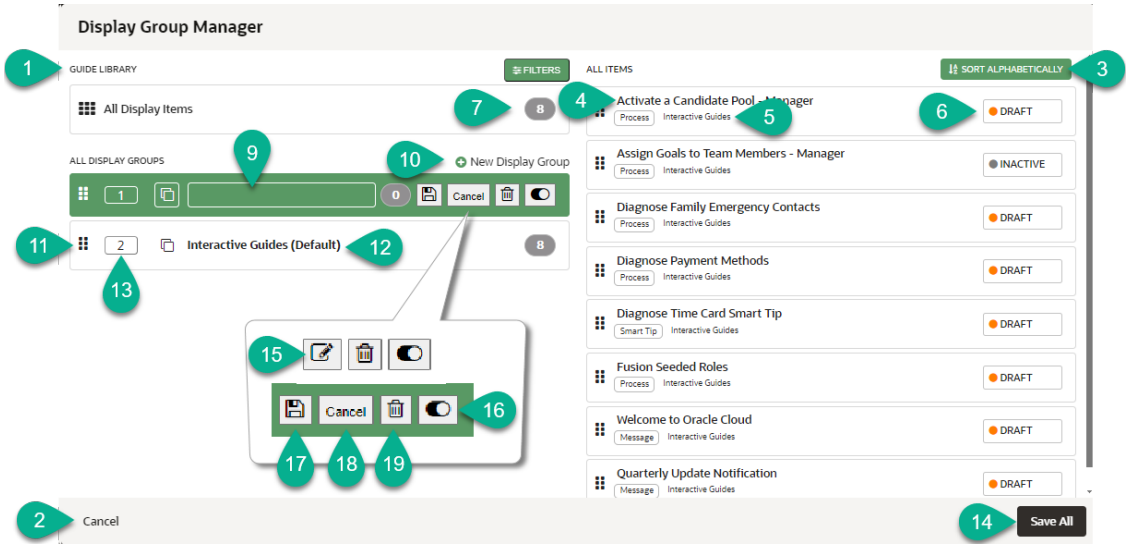
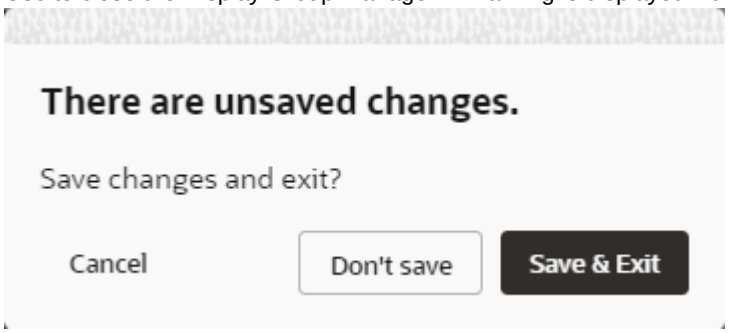


Legend	Description	Additional information
1	Filter	Filtering Content for Display Groups Use filters to locate items to associate with a display group. Select the Filters button to show or hide the filters and search box.
2	Close	Use to close the Display Group Manager. A warning is displayed if there are unsaved changes. 

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Legend	Description	Additional information
3	Sort alphabetically	Use to sort items in alphabetical order (A→ Z). Note: Action cannot be undone.
4	Item name	Displays the item's name
5	Display group label	Displays the item's current display group association

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Legend	Description	Additional information
6	Item status	Displays the item's status (i.e. Published)
7	Item count	Displays the total number of display items and the number of items per display group.
9	Display group name	Display group name field. Duplicate names are not allowed.

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Legend	Description	Additional information
10	New display group button	Use the button to create new display groups.
11	Drag to reorder icon	Use the icon to manually reorder the items and/or display groups using drag and drop, or you can specify the order by numbering them. To reorder, drag and drop each display group/item in the order of choice.

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Legend	Description	Additional information
1	Displays the display group's current name.	
2	Displays the display group name	
3	Displays the display group/order number	Identifies the display group's order number. To reorder, edit the display group and specify the order by entering the required number in the number field.

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Legend	Description	Additional information
14	Save all button	Saves all the changes made in the Display Group Manager.
15	Edit button	Use the Edit button to update the display group, this only includes the display group name, icon, and sequence numbering.
16	Toggle glebutton	Use the button to toggle the display group as active or inactive. If set to inactive, the items associated with the display group will not be visible in the OGL Help Widget but can be accessed by using the search functionality in the OGL Help Widget. This functionality is helpful when you need to make items available only by searching in the OGL Help Widget.
17	Save webbutton	Use to save changes made to the display group, this includes changes made to the name, icon, and sequence numbering.

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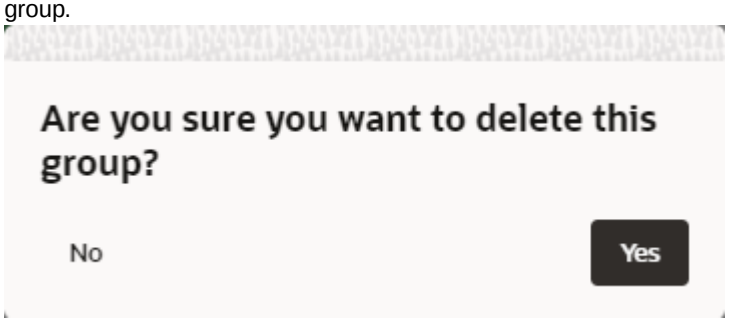
Legend	Description	Additional information
18	Cancel button	Use to discard changes made to the display group, this includes changes made to the name, icon, and sequence numbering.
19	Delete button	Deletes the display group. A warning dialog box is displayed to confirm the action. This action cannot be undone. Items that were assigned to the deleted group will be assigned to the default display group.  Note: You can close the Display Group Manager and to chose to not save the changes. This will discard the changes made and revert to the display groups prior to the delete action.

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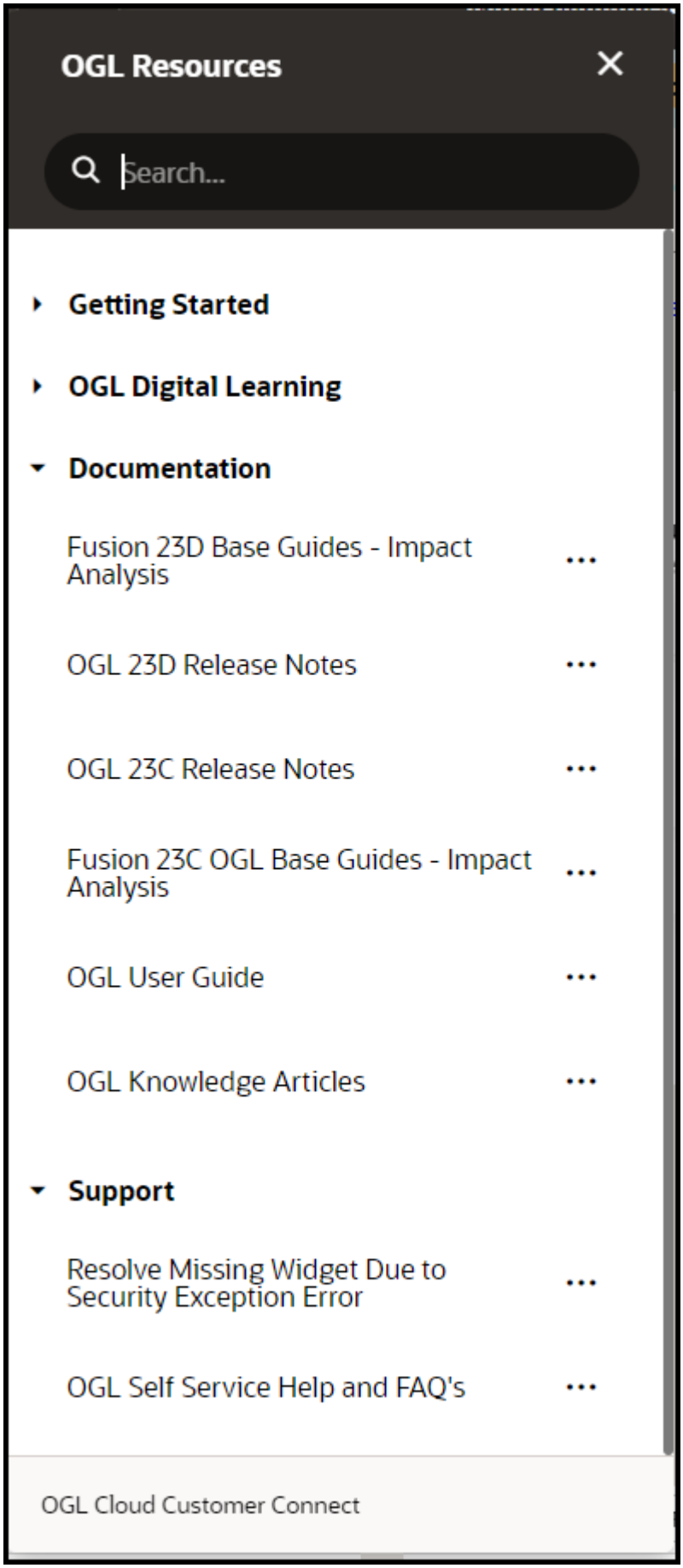

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Creating Display Groups

When you create display groups in the Display Group Manager you provide a name and an icon, and then you can assign content.

To create a display group:

1. On the OGL Console homepage, go to the left navigation panel.
   You see the **Settings** section in the navigation panel.
2. Select the **Display Groups** dropdown menu.

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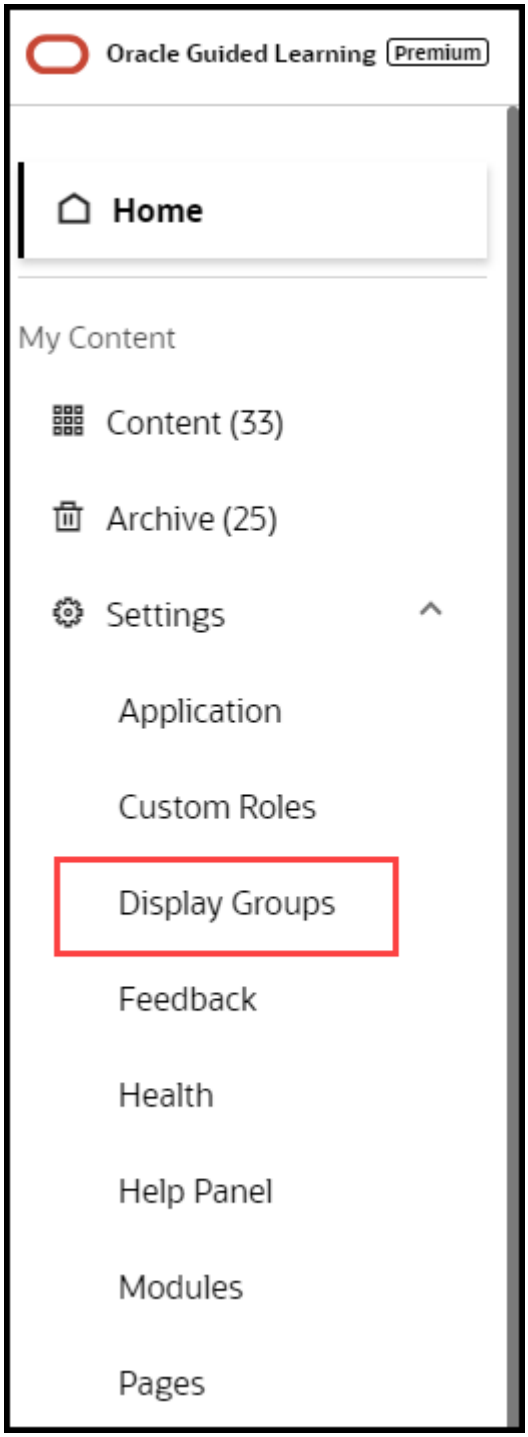

3. Click **New Display Group** in the **Display Group Manager**
4. In the Display Group Manager window,
5. Enter the **Name** of the display group
   IMPORTANT: Your display group name cannot contain any special characters (* | \ " : < > [ ] { } ` ( ) ' ; & $)
6. Select **Save**
7. Add content to the display group by dragging & dropping to the display group

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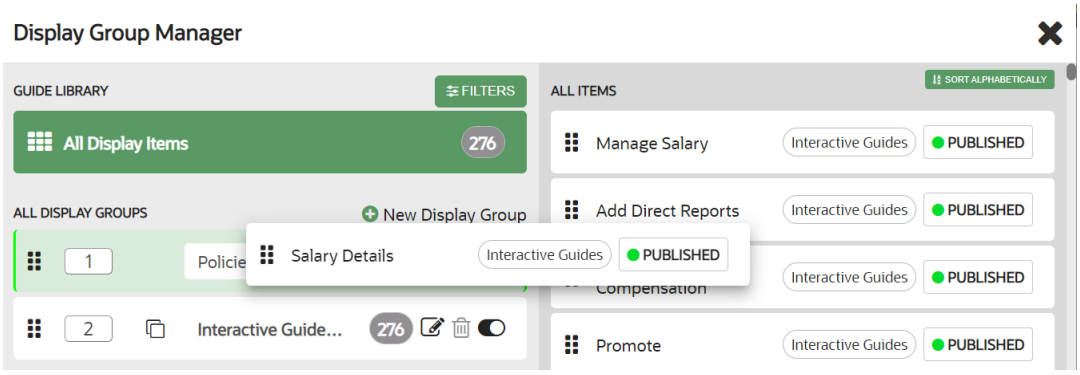
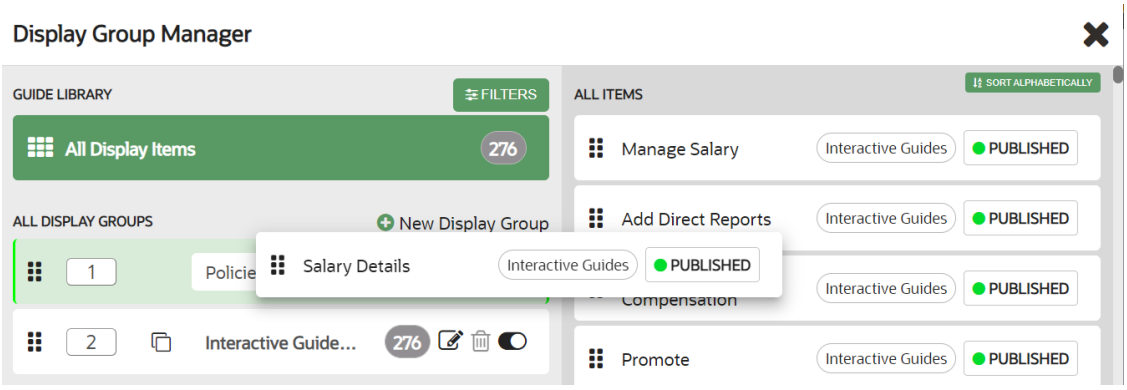


8. Select **Save All** to save the changes and close the **Display Group Manager**

Adding Content to Display Groups

You can add content by dragging the item from the right side and dropping the item into the appropriate display group on the left. After the item is added to a display group, the display group association tag is updated next to the item name. To remove items from a display group, simply drag and drop the item into the new display group. To see the contents of a display group, select the group's name on the left of the Display Group Manager.



Filtering Content for Display Groups

If you have many guides, you can use filtering or search for a guide to place in a display group. To access search and filters, select **Filters** at the top of the Display Group Manager.

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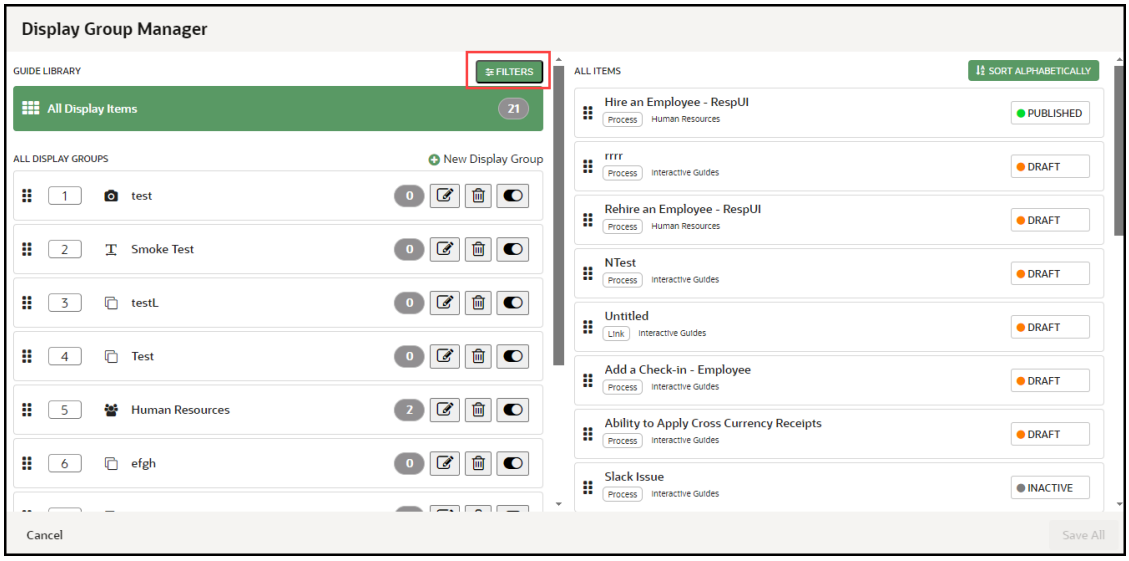
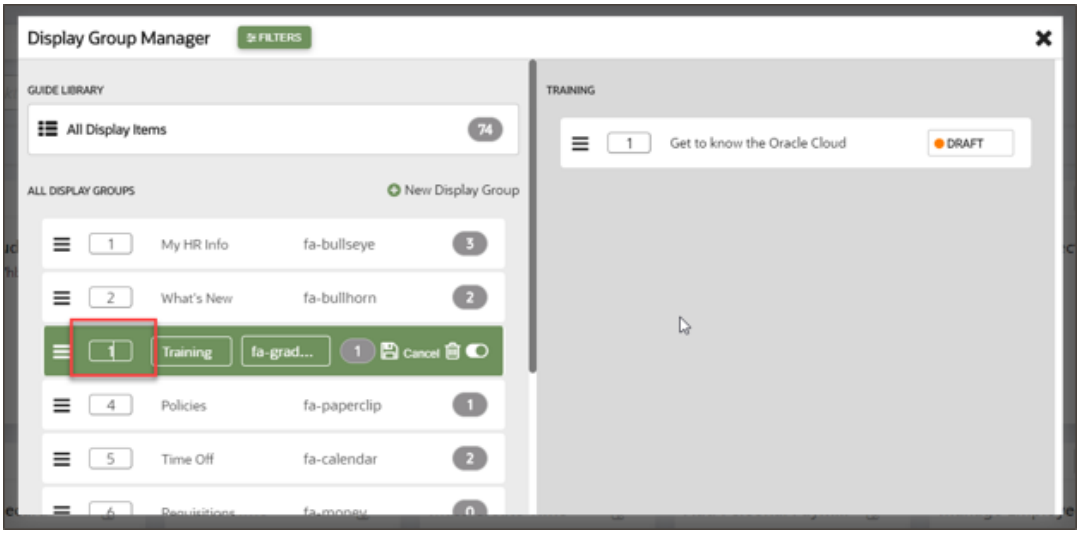


Reordering Display Groups

Use the Display Group Manager to configure the order of display groups and the content within them. You can reorder display groups and guides using drag and drop, or you can specify order by numbering them.

To reorder display groups:

- Drag and drop each display group in the order that you want them to be displayed.
- Edit the display group and specify the order by entering numbers in the display group order boxes.



To reorder guides:

- Specify guide order by selecting a display group then entering the numeric order of each guide in the order boxes.

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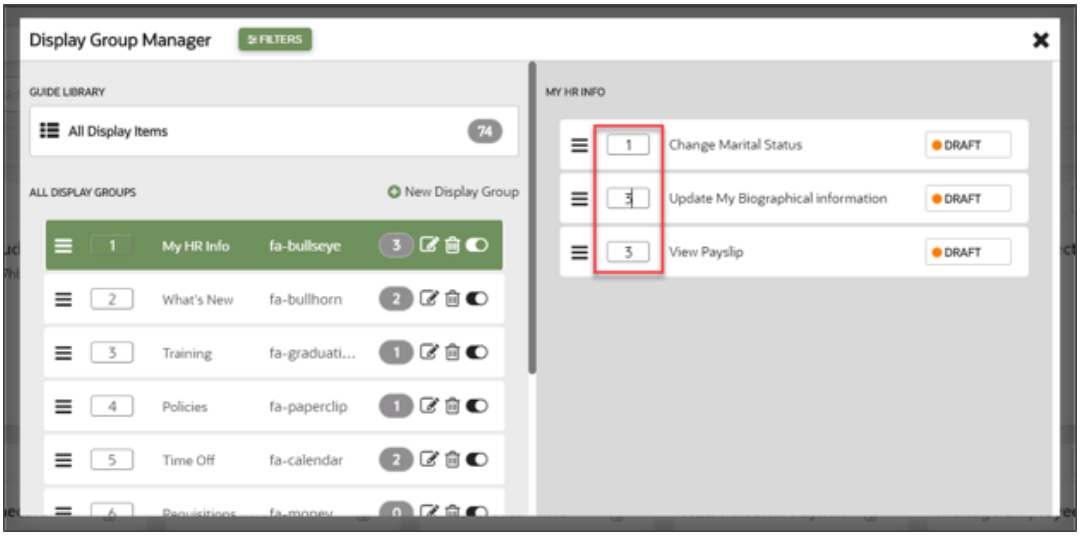
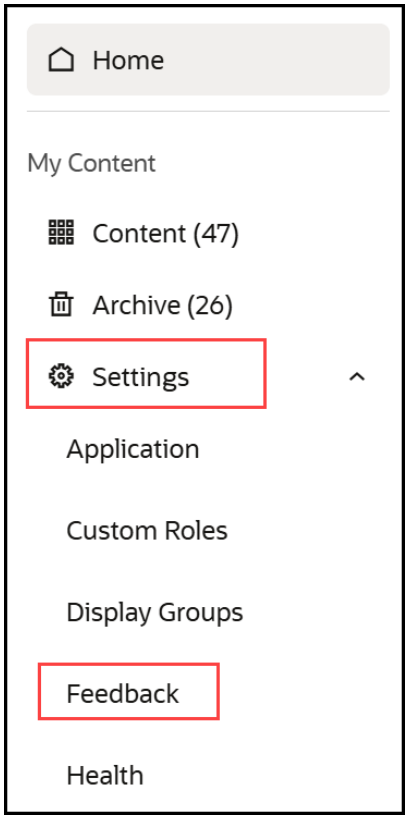


Feedback

Accessing the Feedback Settings

1. In the left navigation panel, select the Settings menu.
2. Select Feedback from the list.



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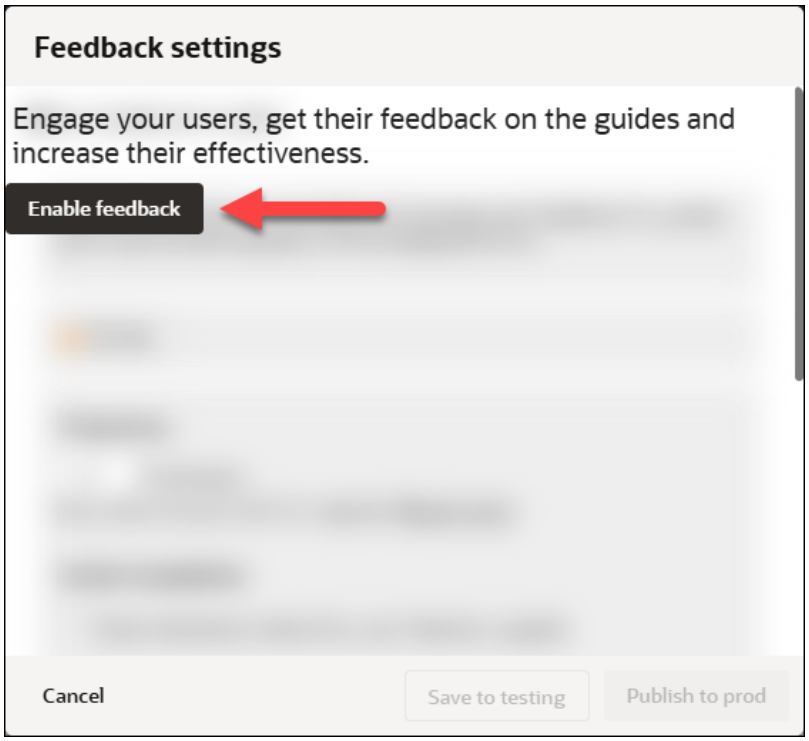
> **Note**
>
> Feedback is disabled by default, to enable, select the **Enable Feedback** button. Once enabled, feedback is enabled for all items in the My Content library (*See Guide Level Control of Feedback below*)



Understanding the interface

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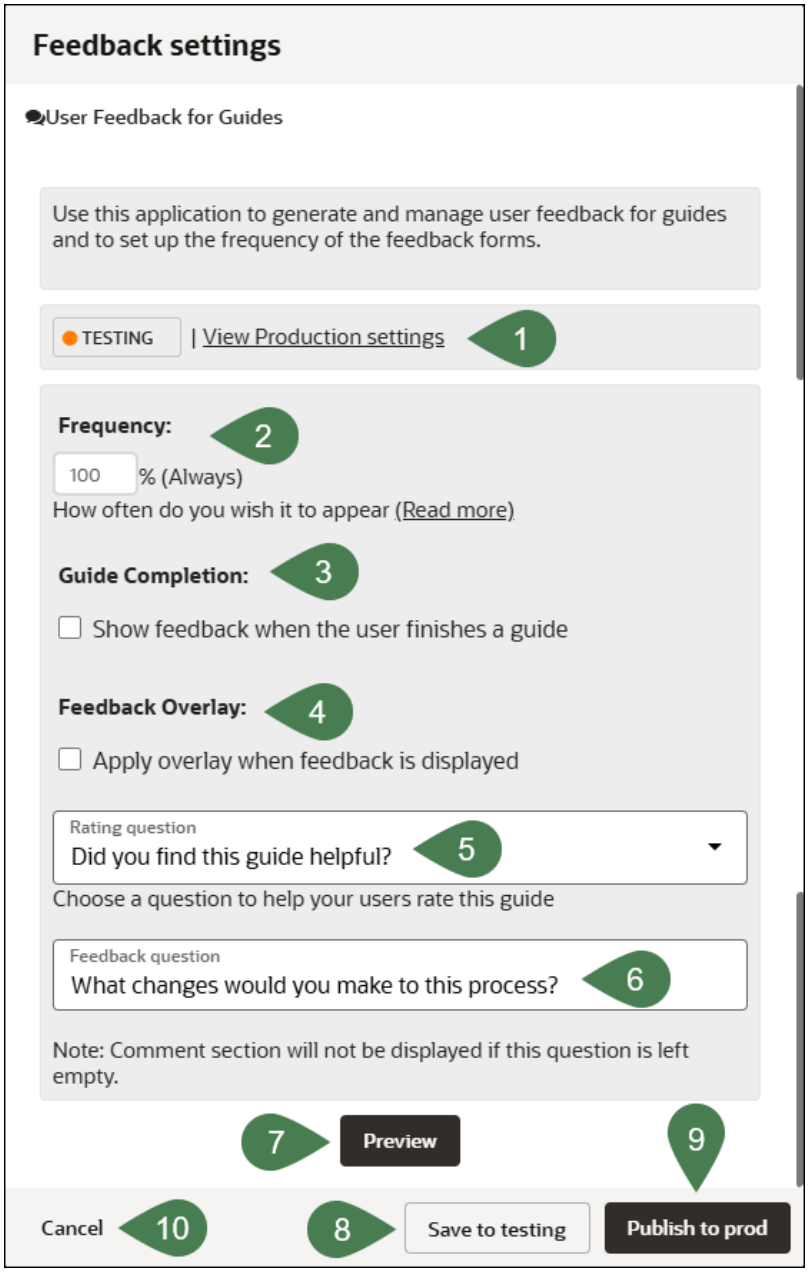

#	Description
1	**Testing | View Production settings or Production | View Testing settings** Toggle between the Testing and Production settings using the link.

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#	Description
2	**Frequency** Controls how frequently a user will be requested to provide feedback. Range 0% (Never) to 100% (Always). If set to 50% this means there is a 50% probability that feedback will be requested from the user. Key considerations: Guided Learning runs several checks before displaying the request for feedback to the user, they are: • OGL will never request feedback twice for the same guide, from the same user • A request for feedback will only be displayed if more than 10 minutes have passed since the last time the user saw a request for feedback. That means if the user has provided feedback for Guide A, then they will see the request for Guide B only if 10 minutes have elapsed since they saw the request for Guide A • If the guide has just one tip/step, for example, a 'Release Notes' notification, the request for feedback will not be shown to the user • Only after all the above conditions have been met will frequency setting be evaluated
3	**Guide Completion** If the "Show feedback when the user finishes a guide" checkbox is selected, the feedback dialog will be presented to users each time a user has closed/completed the guide. **Note** Enabling this setting will override any Frequency settings above. Do not enable this setting if you intend to set the frequency for feedback.)
4	**Feedback Overlay** If selected, an overlay will be applied to the page when the feedback is displayed. Elements outside the feedback tip will be visible but inaccessible while the feedback is active/being displayed.
5	**Rating Question** Predefined questions can be selected from the drop-down, these are meant to assist users to rate the guide. Available options are: • Was this guide helpful? • Did you find this guide helpful? • Rate this guide: • Do you feel this guide helped you?
6	**Feedback Question** This provides a free text field to allow for the customization of the feedback question. This field is prepopulated with the statement "Tell us what was least/most helpful about this guide" Once presented to the user, they can then enter their comments in the provided field. (See Preview)

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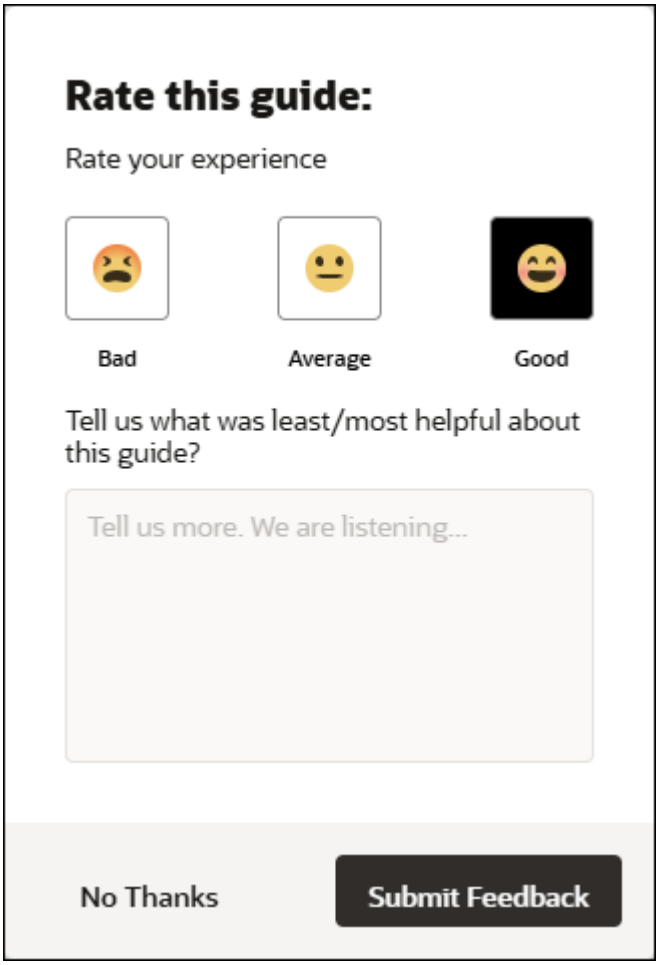
#	Description
7	**Preview** Provides a preview of the feedback settings before saving them to testing/production 
8	**Save to Testing** Saves the current feedback settings to **DRAFT** status. Settings will be reflected in the Development/Testing environment(s) where the OGL configuration is set to Development
9	**Publish to prod** Saves the current feedback settings to PUBLISHED status. Settings will be reflected in the Production environment where the OGL configuration is set to Production
10	**Cancel** Discards any changes and closes the Feedback settings modal

> **Note**
>
> For multi-language content, you will need to translate the Application Properties in the Translations modal to ensure that the feedback settings modal using the Auto Translate option in the translations modal). Once the Application Properties are translated, you need to go the feedback settings modal and click on 'Publish to prod'.

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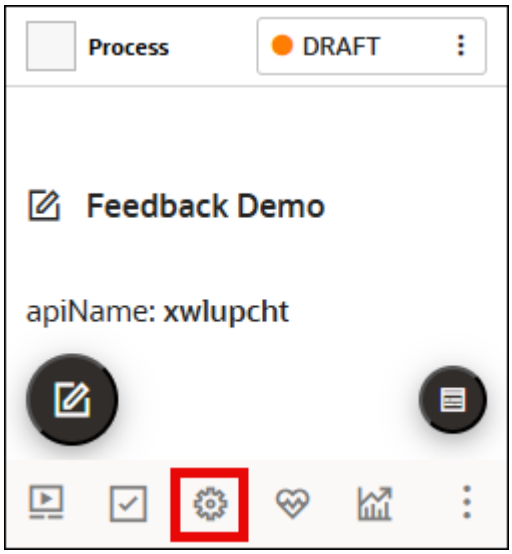
Guide Level Control of Feedback

Enabling feedback at the application ID level enables it for all items in the library. Depending on the organizational requirements, OGL also provides item level control of feedback settings, this means feedback can be disabled for some items in the library or enabled only for a select few items.

For instance, in a library of 20 items, your organization might only be interested in feedback for 5 of the items, this means, you can use item-level control to disable feedback for the 15 items and enable it only for the 5.

To view an items feedback settings:

From the My Content library, select the settings icon on the guide tile.



Set the **Allow Feedback** setting as required

Note: **Checked** = Feedback allowed and **Unchecked** = Feedback not allowed

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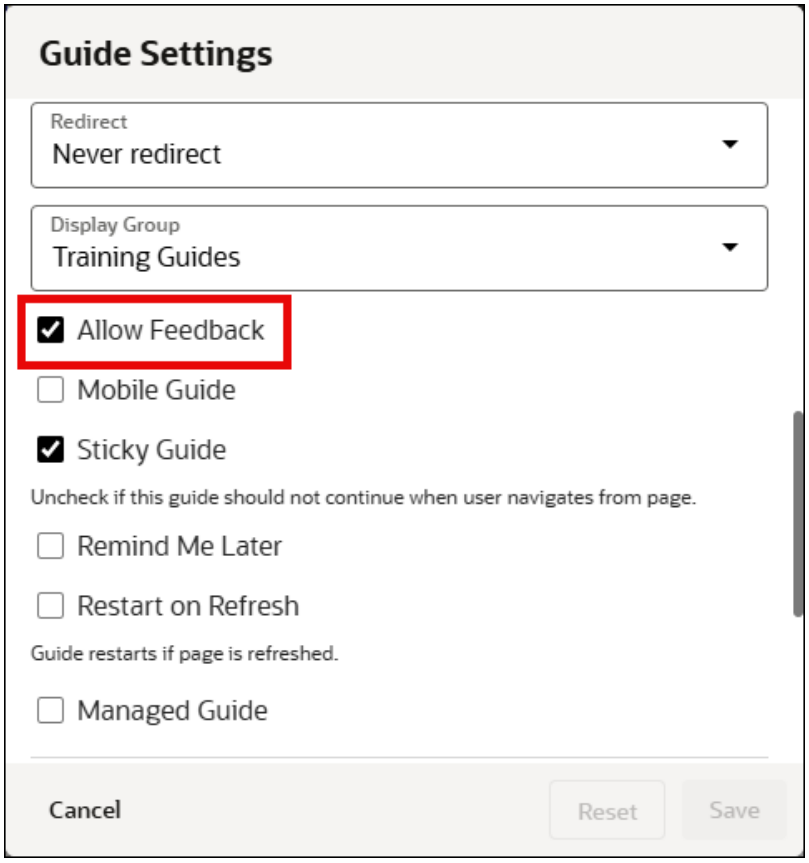
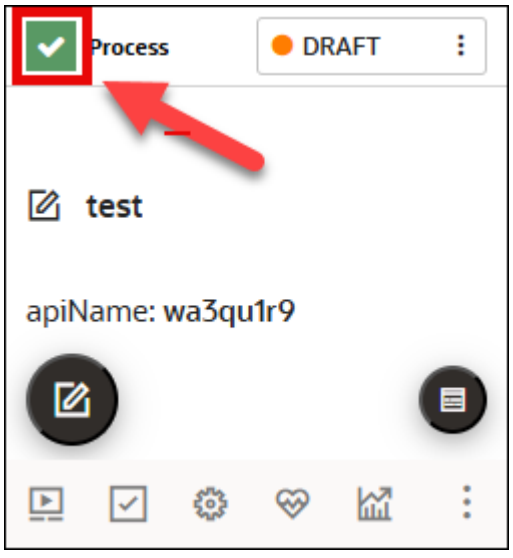


To allow/disallow feedback in bulk:

1. Select multiple content items using the checkboxes.



2. Click the **Action** menu drop-down, then select **Enable Feedback** or **Disable Feedback**.

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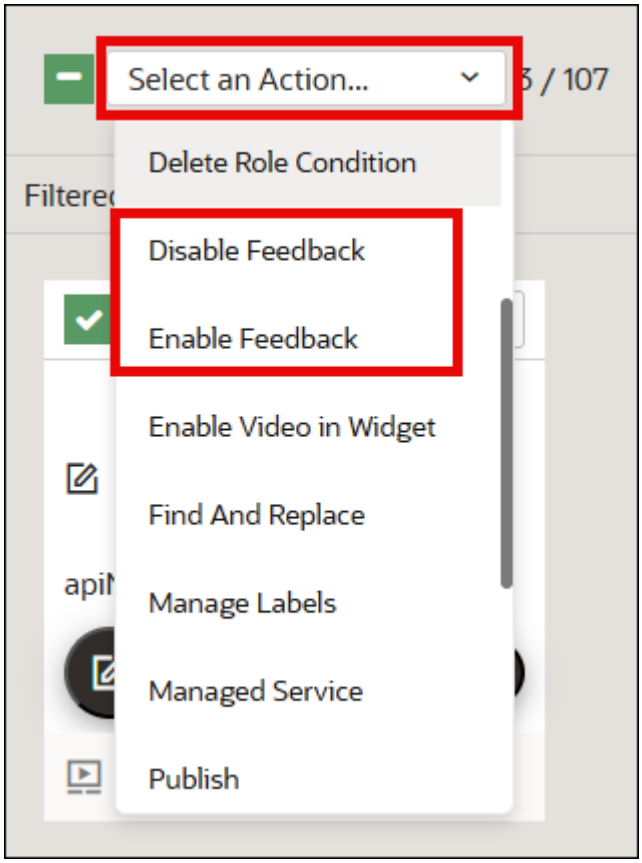

Note

Once completed, you can filter using the Feedback Status filter option.

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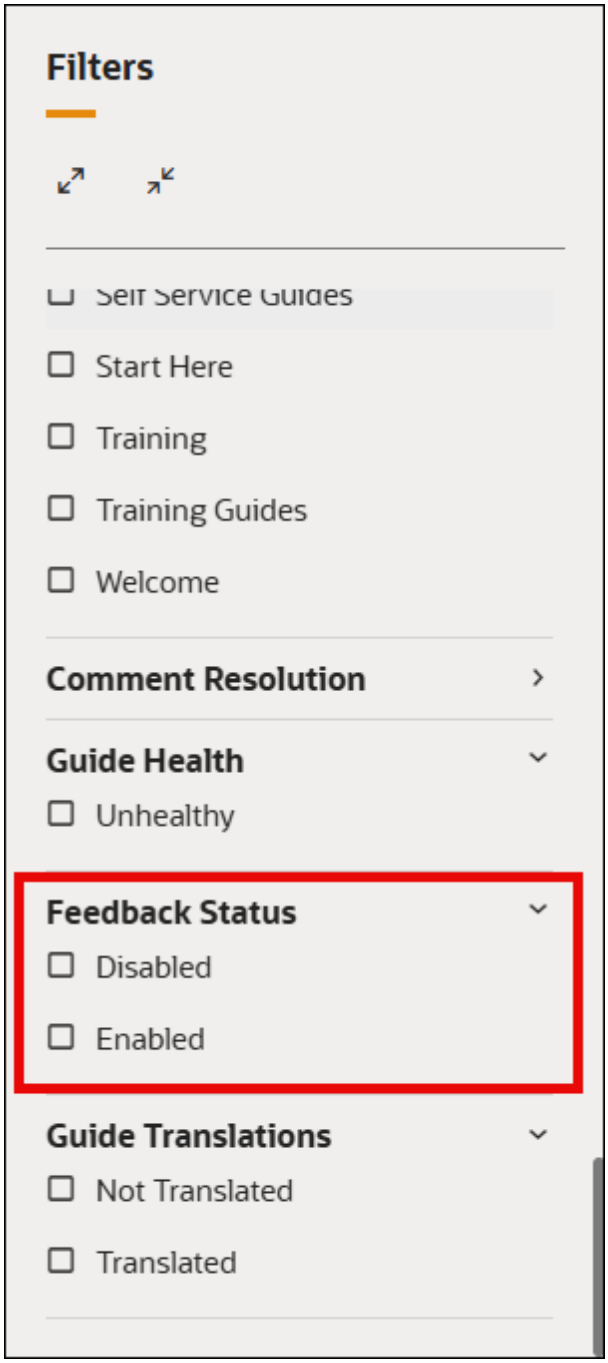

Help Panel

Accessing the Help Widget Settings

1. On the OGL Console homepage, go to the left navigation panel. You can see the **Settings** tab on the left navigation panel.
2. Select **Help Panel** under the Settings tab.

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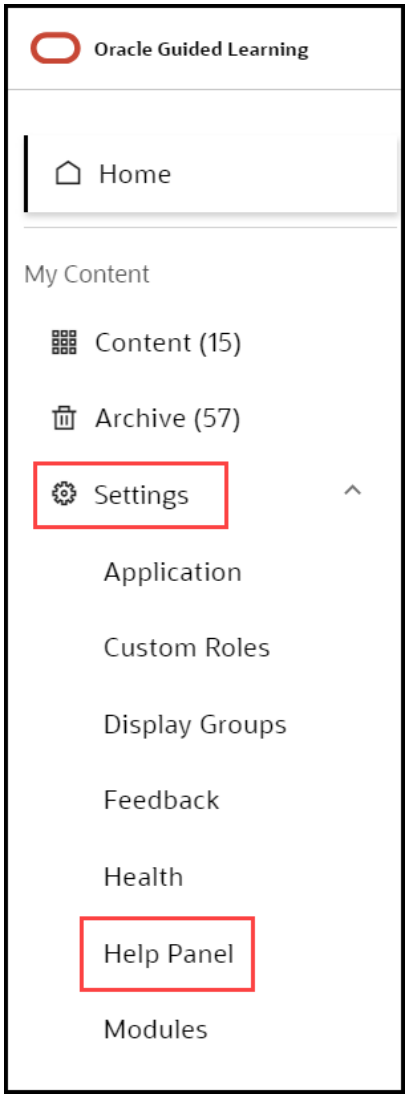

Help Panel Settings window is displayed.

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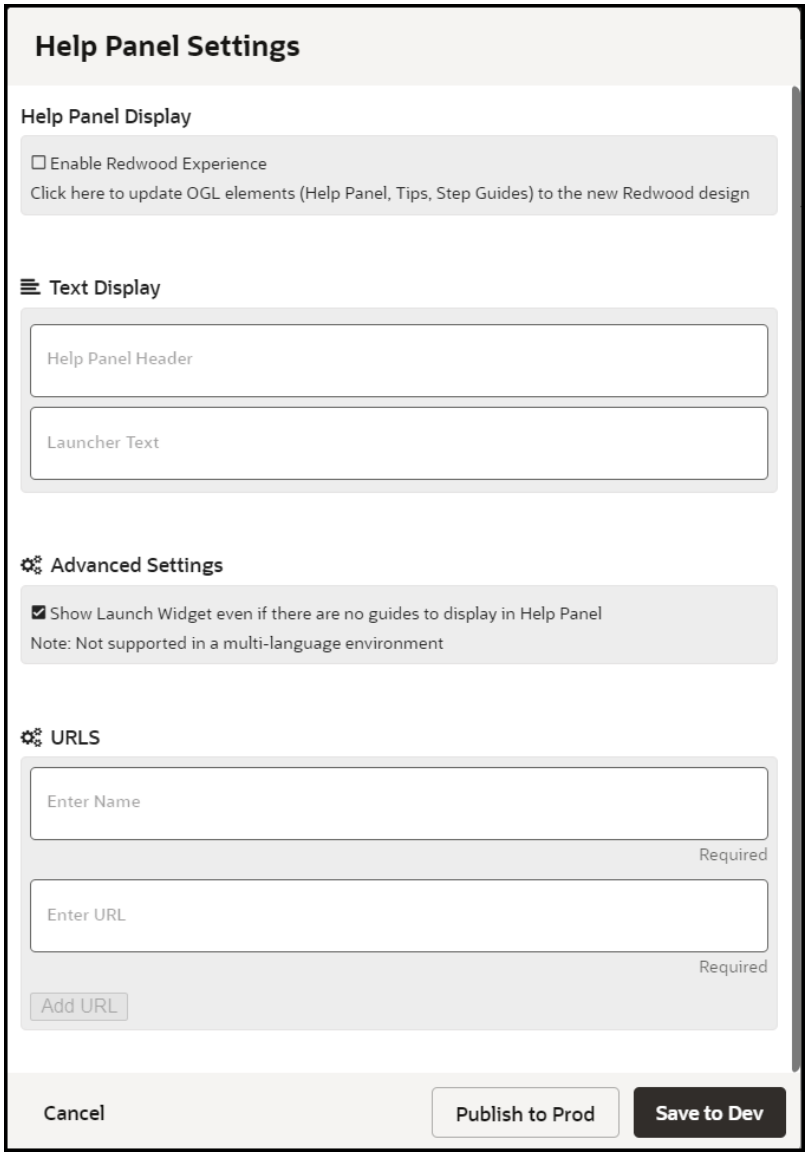

Enabling the new Help Panel

To enable/disable the new Redwood Experience Help Panel, check/uncheck the **Enable Redwood Experience**, then click **Save to Dev** (will only display in non-Prod environments) or **Publish to Prod** (will display in both Development and Production environments) accordingly.

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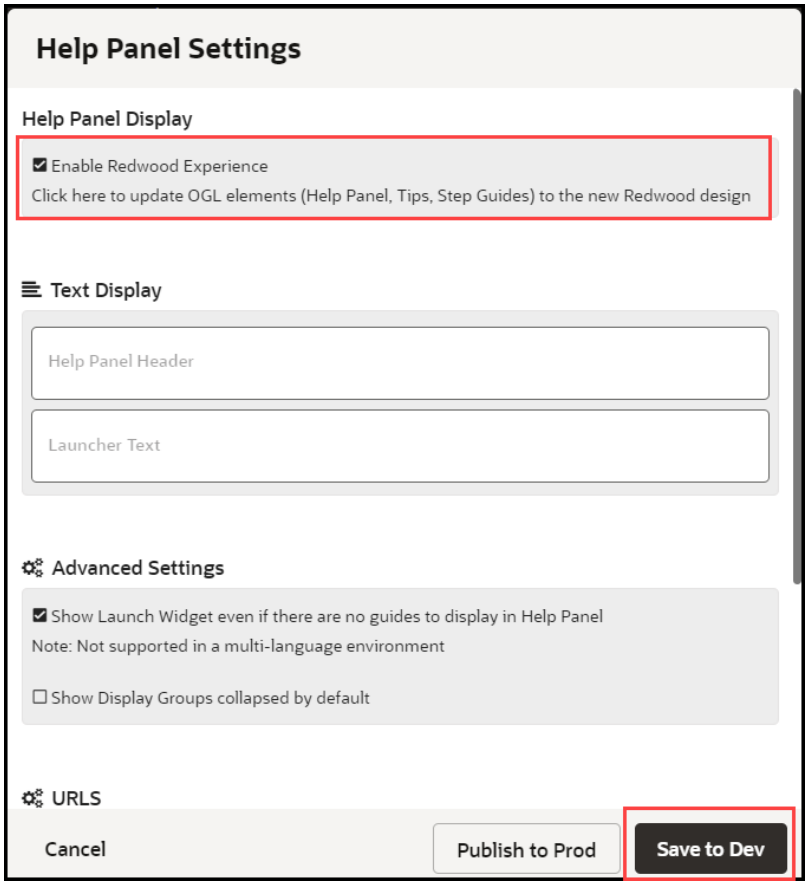

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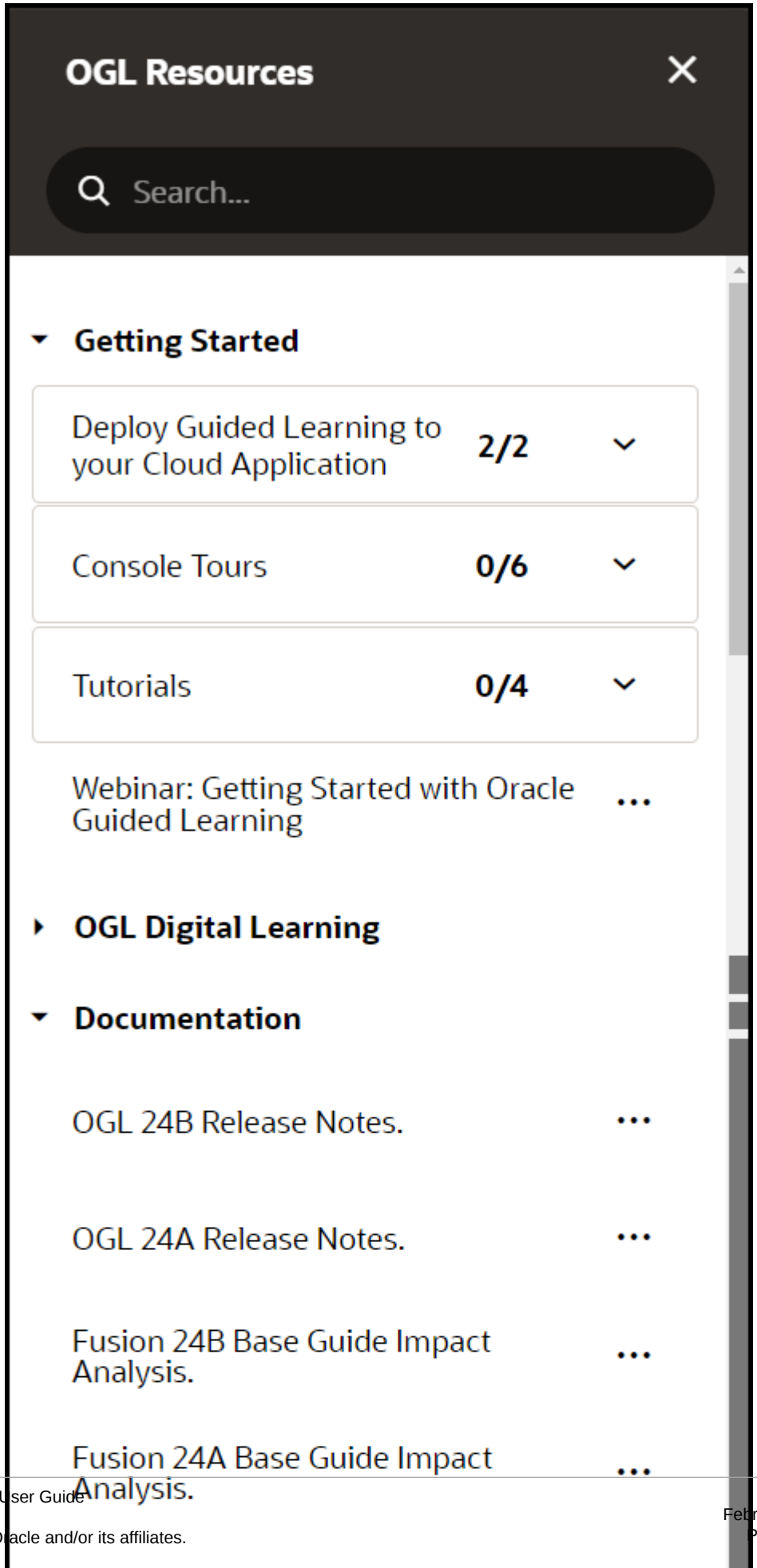

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Modules

Understanding Modules

As your content library grows, it can become increasingly difficult to manage a large volume of guides, especially if you have OGL deployed to multiple Fusion products (e.g. HCM, ERP, etc.) and/or modules (e.g., Financials, Procurement, Human Resources, Recruiting, etc.). One way to organize your guides may be to categorize them by the Fusion products and modules to which they are associated. Whether you are using OGL in Fusion or other applications, product and module labels allow you to manage your guides more efficiently, making it easier to find, filter, and organize guides by their respective products and modules. The Products and Modules features enable console users to create, edit, and manage custom labels which can then be tagged to guides for use in filtering in both the Content library as well as Analytics.

Accessing the Modules Manager

1. On the OGL Console homepage, go to the left navigation panel.
   You can see the **Settings** tab on the left navigation panel.
2. Select **Modules** from the **Settings** tab on the left navigation panel.

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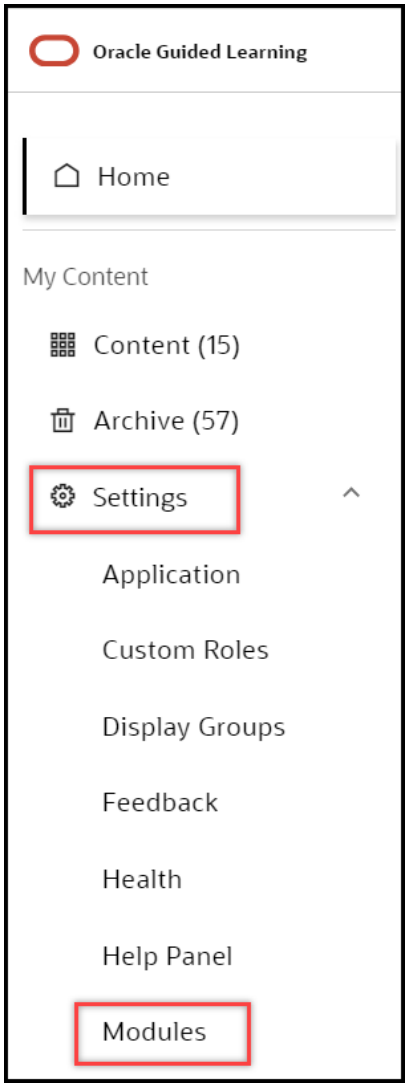
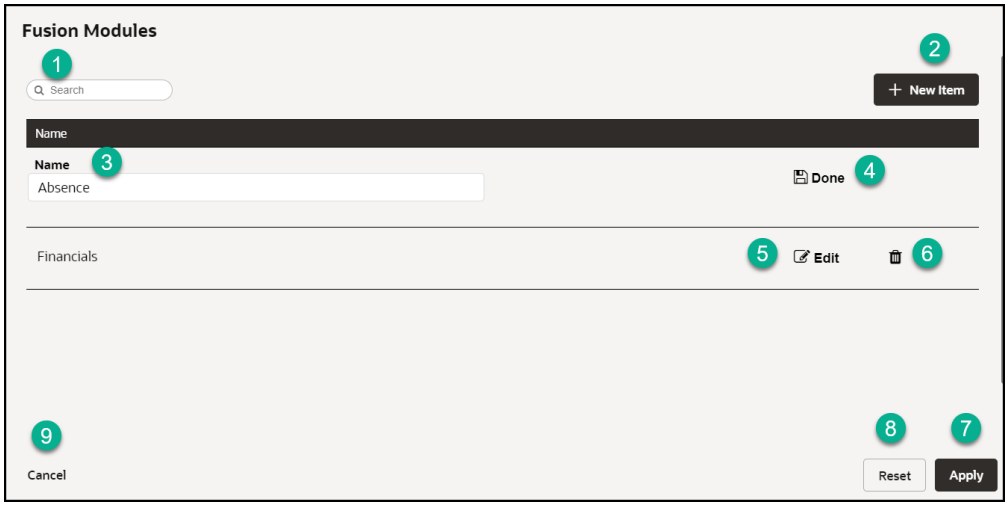


Understanding the Interface



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Legend	Name	Additional information
1	Search box	Provides dynamic search functionality.
2	New item	Adds a new line to the list.
3	Name field	The name field cannot be empty. Duplicate values are not allowed.
4	Done/Save	Saves the changes made to the field. The button only becomes active when an acceptable value is entered in the field.
5	Edit	Allows changes to be made to the field.
6	Delete	Deletes the line item. Action cannot be reversed and all linked content items will be disassociated.
7	Apply	Saves the changes made. A confirmation is displayed if the operation has either been completed successfully or failed with errors.

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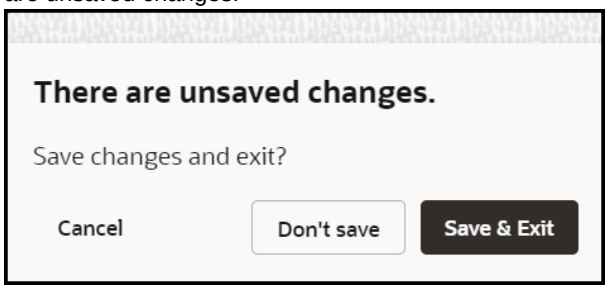
Legend	Name	Additional information
8	Reset	Reset the changes made. A warning will be displayed if there are unsaved changes.
9	Cancel	Discards any changes that were made and closes the interface. A warning will be displayed if there are unsaved changes. 

You can use the Module labels to filter your guides by their respective modules.

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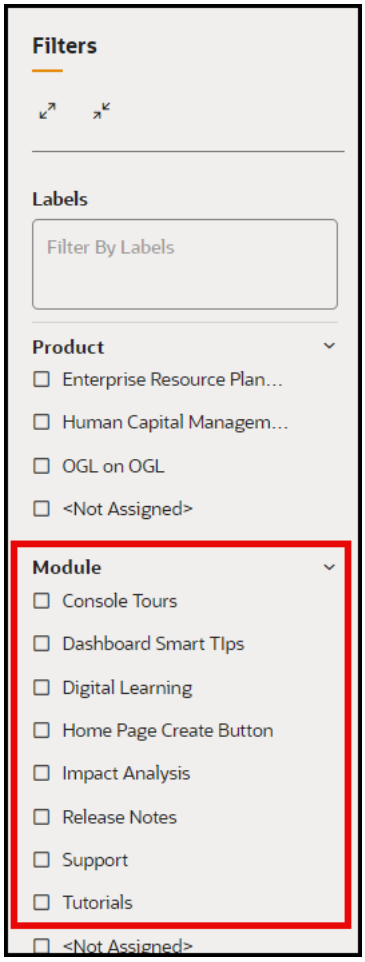

Pages

A common method to determine when a guide should run or be visible in the Help Panel is to apply a guide activation condition that is based on the page URL, or for Fusion, the page route. Getting the route in Fusion is not a straightforward task and keeping track of all the pages and their URLs or page routes for an application can be a difficult task. The Pages manager can help console users efficiently catalog and manage page URLs and/or Fusion page routes by assigning them a user-friendly name that can later be referenced in guide activation conditions.

Accessing the Pages Manager

From the left navigation panel, select Settings> Pages to open the Pages manager.

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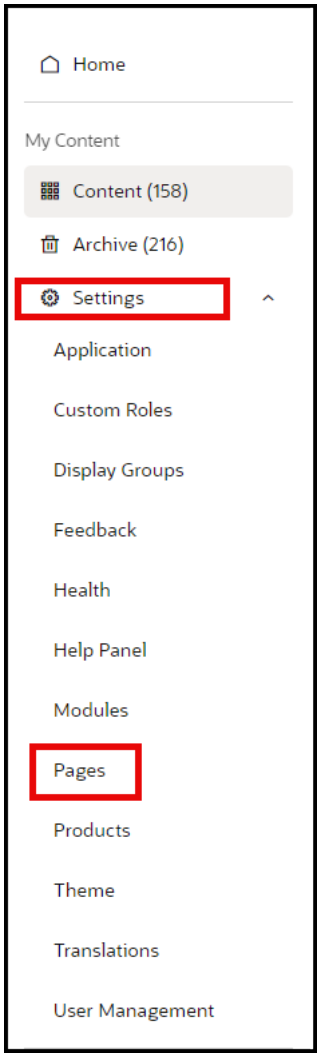

Configuring Pages

In the Pages manager, you can create new custom pages and assign a user-friendly name to an associated URL or Fusion page route. To find the Fusion page route, see instructions in #4 on the below.

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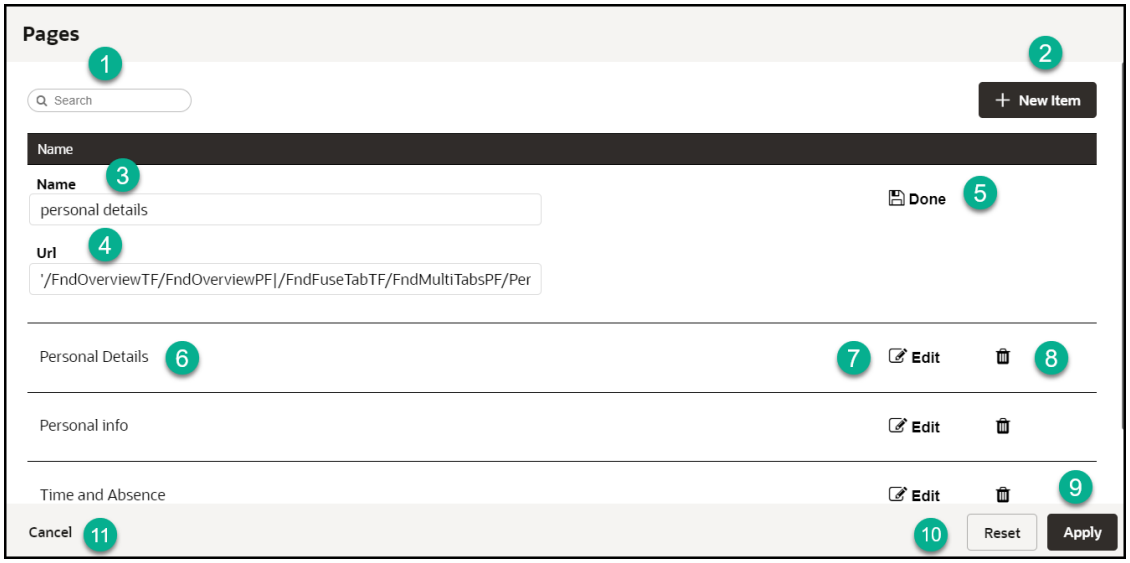

Legend	Name	Additional Information
1	Search	Provides dynamic search functionality.
2	New Item	Adds a new line to the list.
3	Name Field	The name field cannot be empty. Duplicate values are not allowed.

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Legend	Name	Additional Information
4	URL	To find the URL: • Navigate to the page in Fusion (i.e Expenses page) • Right-click on the page and select **Inspect** from the menu. • Select the console tab • Enter the following code **iridize.master.getRoute(),** then press Enter/Return • Copy the returned page route • Select **New Page** in the Page Manager • Enter the copied route into the URL field **Note** This is the route automatically captured by OGL or returned by **iridize.master.getRoute()**
5	Done/Save	Saves the changes made to the field. The button only becomes active when an acceptable value is entered in the field.
6	Page name field (Existing)	This name has been automatically defined by OGL.
7	Edit	Allows changes to be made to the field.

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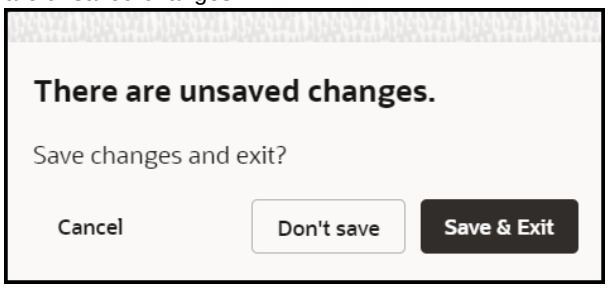
Legend	Name	Additional Information
8	Delete	Deletes the line item. Action cannot be reversed and all linked content items will be disassociated.
9	Apply	Saves the changes made. A confirmation is displayed if the operation has either been completed successfully or failed with errors.
10	Reset	Reset the changes made. A warning will be displayed if there are unsaved changes.
11	Cancel	Discards any changes that were made and closes the interface. A warning will be displayed if there are unsaved changes. 

Using Pages Info for Activation Settings

From the OGL Console, select the check icon for the guide that you want to access.

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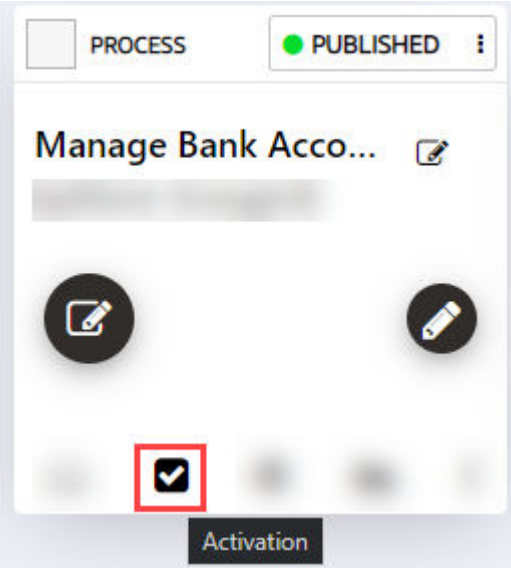
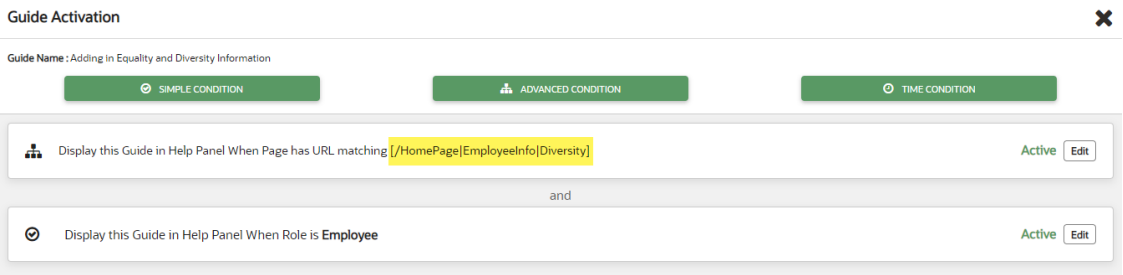
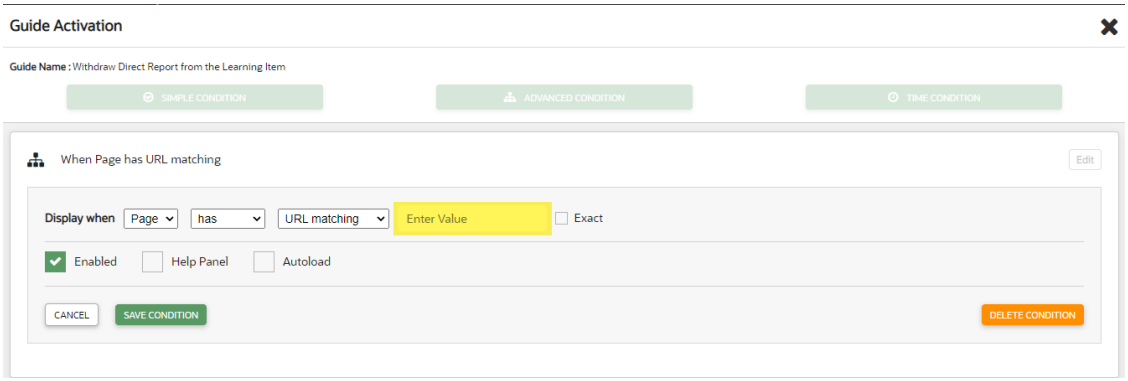


By copying the route value for a page (highlighted in the image below), the developer can copy the URL (or route, in the case of Fusion) for use in configuring activation settings.



Once the URL has been copied, it is just a matter of pasting that value in the field outlined in red below. Be sure to paste in the value exactly as copied and do NOT enclose the pasted URL in brackets ([ ]).



Important: If a page has been defined in the pages Manager, then the condition can be added as a simple condition (When Page is (or is not)). When a page becomes defined in Page Manager, OGL will update the corresponding guides to reflect the page name.

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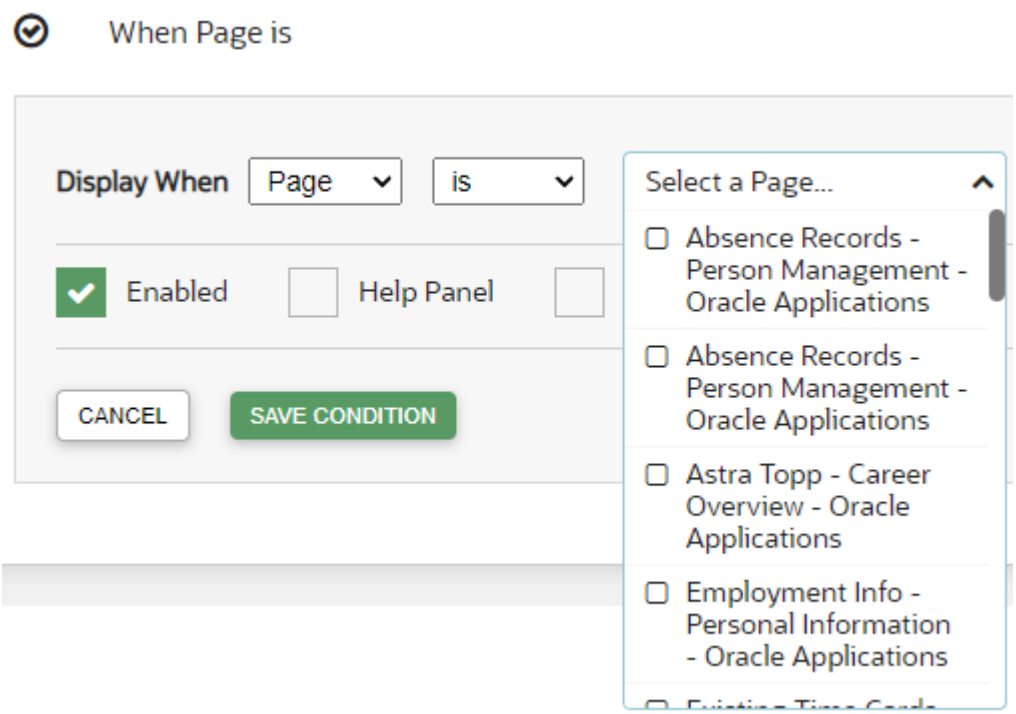

For more information, refer to Enabling Guide Activation Settings.

> **Note**
>
> Some Fusion page routes may change during a Fusion quarterly update. In this case, you will need to manually update the page routes in the Pages manager. This will not happen automatically. As a best practice, we recommend that you review and update page routes with each Fusion quarterly update or consult with your Fusion administrator to identify any potential impacts on page routes and update them in the Pages manager accordingly.

Products

Understanding Products

As your content library grows, it can become increasingly difficult to manage a large volume of guides, especially if you have OGL deployed to multiple Fusion products (e.g. HCM, ERP, etc.) and/or modules (e.g., Financials, Procurement, Human Resources, Recruiting, etc.). One way to organize your guides may be to categorize them by the Fusion products and modules to which they are associated. Whether you are using OGL in Fusion or other applications, product and module labels allow you to manage your guides more efficiently, making it easier to find, filter, and organize guides by their respective products and modules. The Products and Modules features enable console users to create, edit, and manage custom labels which can then be tagged to guides for use in filtering in both the Content library as well as Analytics.

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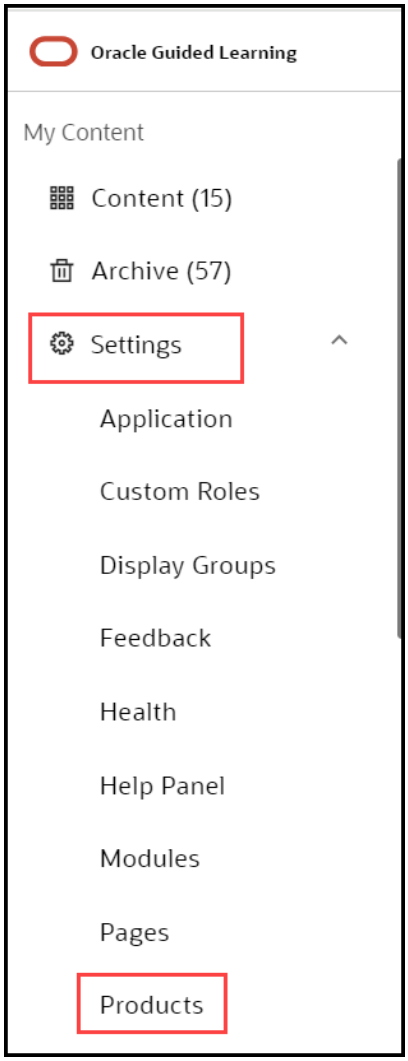
Accessing the Interface

1. On the OGL Console homepage, go to the left navigation panel.
   You can see the **Settings** tab on the left navigation panel.
2. Select **Products** from the **Settings** tab on the left navigation panel. in the OGL Console.



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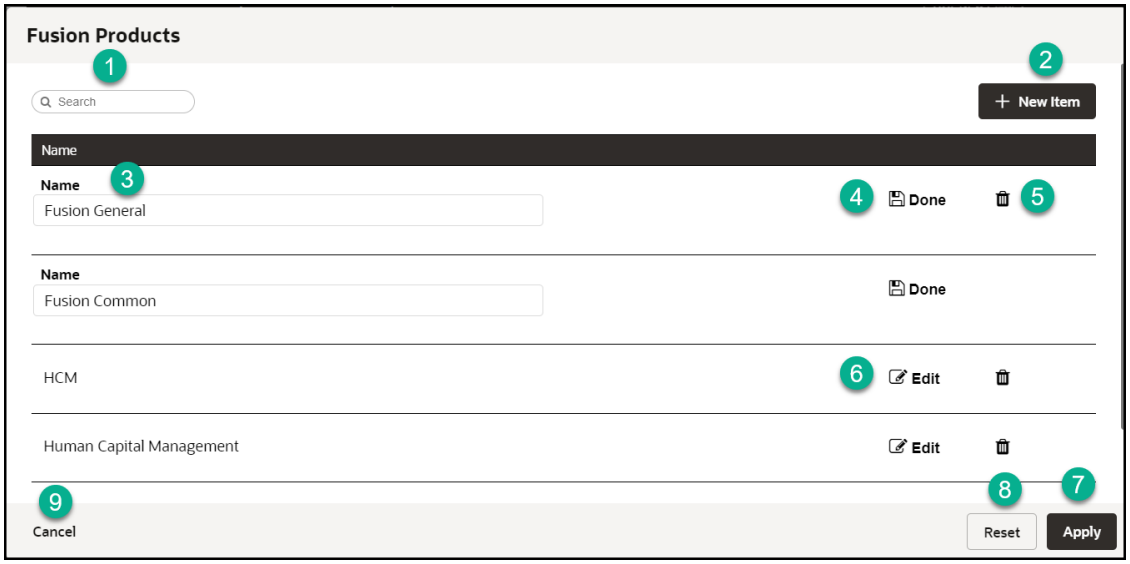
Understanding the Interface



Legend	Name	Additional information
1	Search	Provides dynamic search functionality.
2	New item	Adds a new line to the list.
4	Name field	The name field cannot be empty. Duplicate values are not allowed.

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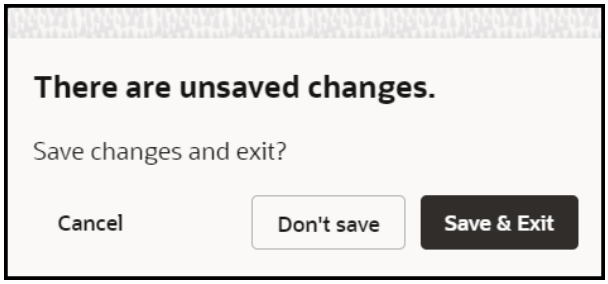
Legend	Name	Additional information
5	Done/Save	Saves the changes made to the field. The button only becomes active when an acceptable value is entered in the field.
6	Edit	Allows changes to be made to the field.
6	Delete	Deletes the line item. Action cannot be reversed and all linked content items will be disassociated.
7	Apply	Saves the changes made. A confirmation is displayed if the operation has either been completed successfully or failed with errors.
8	Reset	Reset the changes made. A warning will be displayed if there are unsaved changes.
9	Cancel	Discards any changes that were made and closes the interface. A warning will be displayed if there are unsaved changes. 

You can use the Product labels to filter your guides by their respective products.

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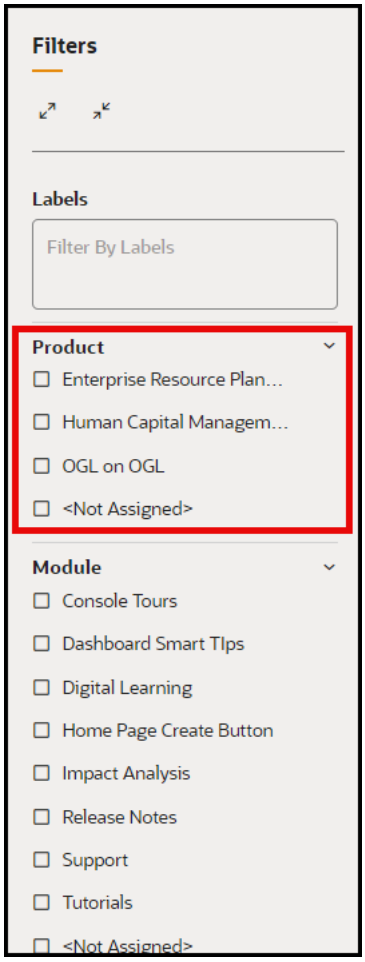

Theme

Oracle's Accessibility Program
Please note that modifying the Theme (Design Kit) might impact accessibility. For more information about Oracle's commitment to accessibility, see http://oracle.com/accessibility.

Accessing the Interface

1. On the OGL Console homepage, go to the left navigation panel.
   You can see the **Settings** section in the navigation panel.
2. Select the **Settings** dropdown menu.
3. Select **Theme** in the left panel.

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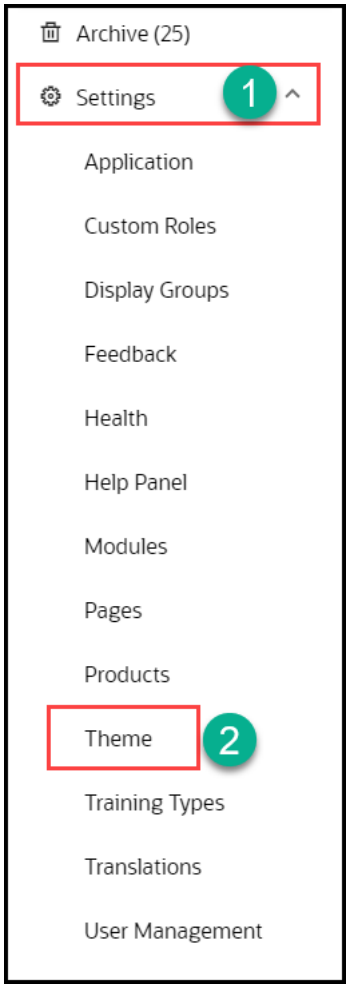

WYSIWYG Theme Editor

Customers may sometimes need to change their OGL theme to align with their corporate branding standards. Previously, OGL theme customization was limited to editing the HTML file within the OGL design kit, requiring users to have knowledge of HTML and CSS to make theme customizations.

With the new Theme Editor in OGL 25B, developers and administrators can now make changes to their OGL theme using a more user-friendly tool that incorporates a “What You See Is What You Get” (WYSIWYG) visual interface without the need to edit CSS rules in an HTML file.

This new feature offers a more convenient and efficient way to format the appearance of common OGL theme elements, such as tooltips, backgrounds, text, buttons, launch widget, smart tips, and help icons. Themes can be saved, imported, exported, and set for Development and/or Production environments.

In this first iteration of the WYSIWYG Theme Editor, users will be able to customize the primary, secondary, and tertiary colors of the following OGL theme components:

- Body Color
- Button, Launch Widget and Header Color
- Footer Color

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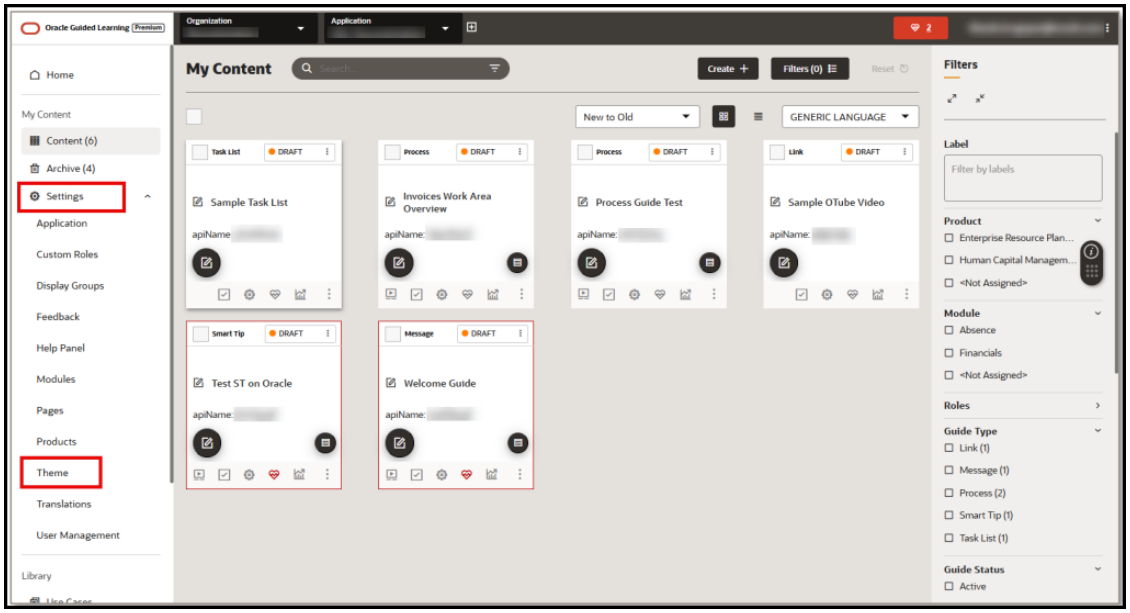
- SmartTip Background, Icon Color, and Icon CharacterOn the OGL Console homepage, go to the left navigation panel.

The Theme Editor also allows users to preview their theme changes in real-time, save and name the theme, and set the theme for PROD and/or DEV environments. The Theme Editor also allows users to Duplicate, Export, Import, and Delete themes, as needed.

Launching the Theme Editor

From the OGL Console, select **Settings > Theme**



The **Theme Editor** modal opens:

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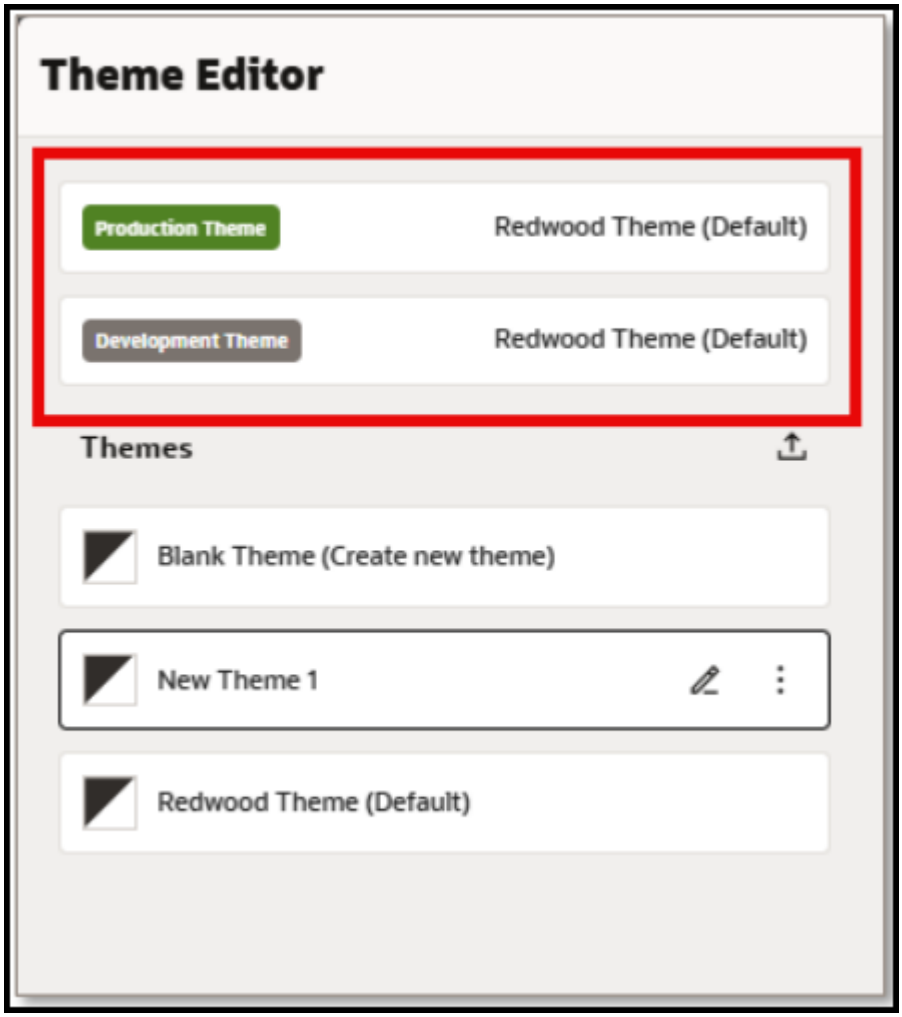
The currently set PROD and DEV themes are always listed at the top of the editor:



Importing Themes

Selecting the **Import Theme**

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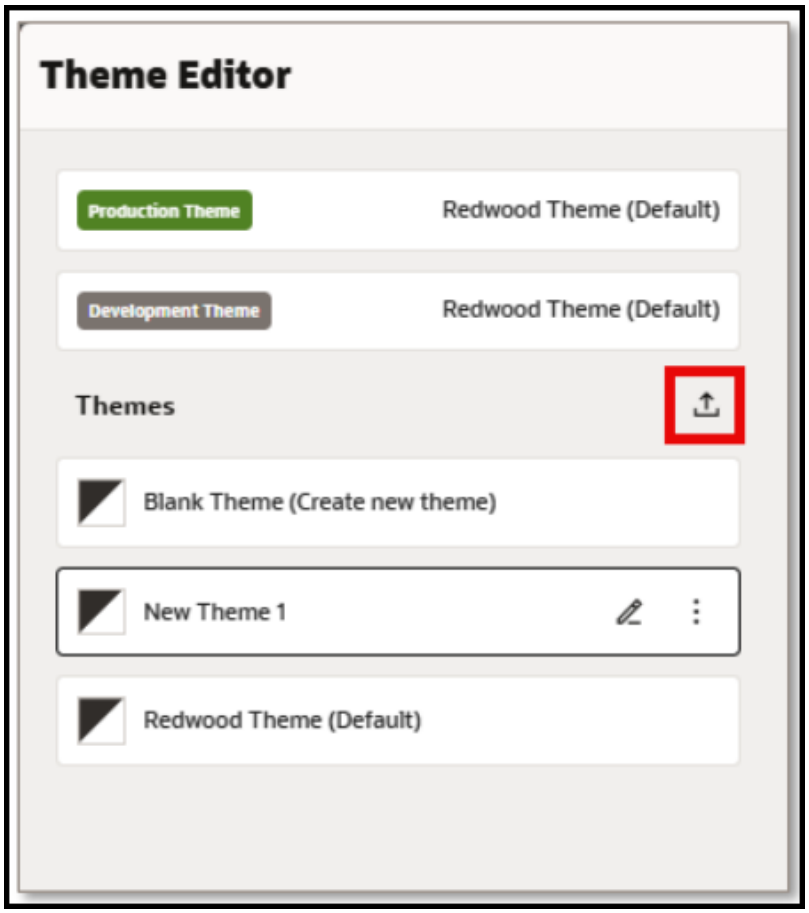
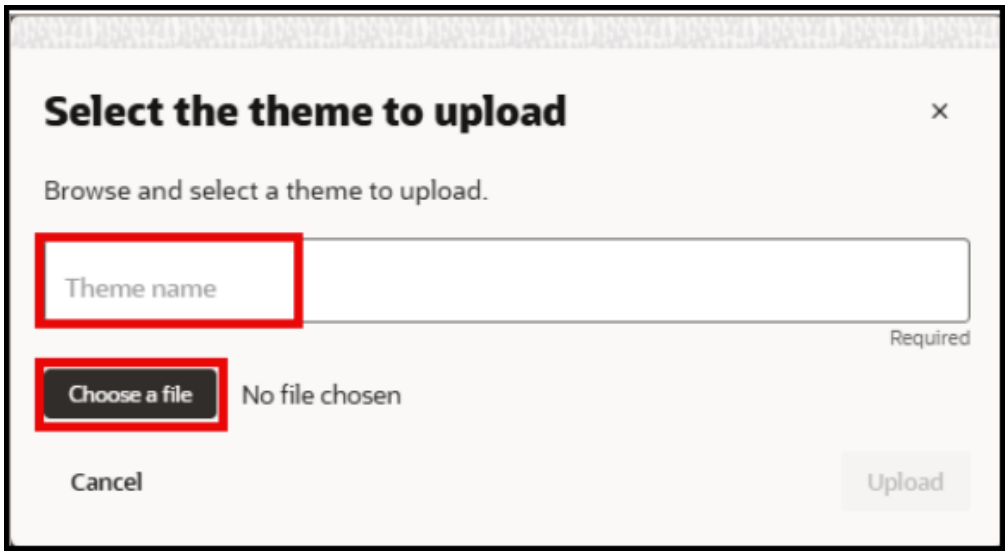
button allows you to select and upload an existing theme (HTML file) from your file system.



Enter a name for your theme and then select **Choose a file** to browse for an existing theme file.



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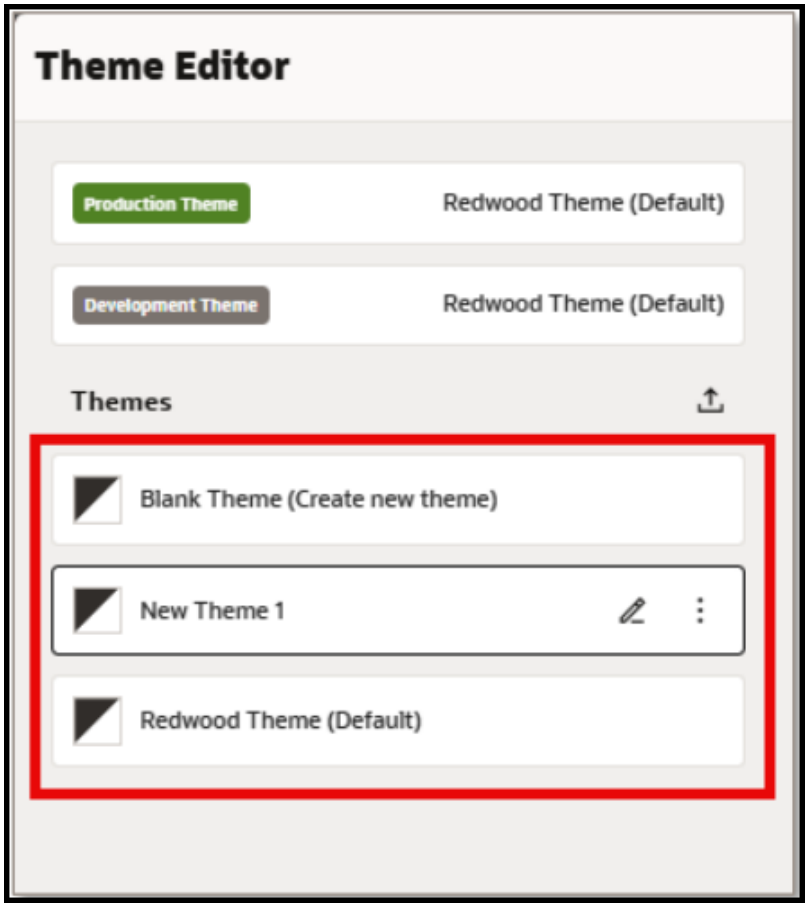
Available Themes List

In the **Themes** section, users can choose from a list of available themes to edit or create a new Blank Theme.



Select the Edit

button next to any theme to open the Theme Settings for the selected theme.

Editing a Theme

The **Theme Editor** now displays:

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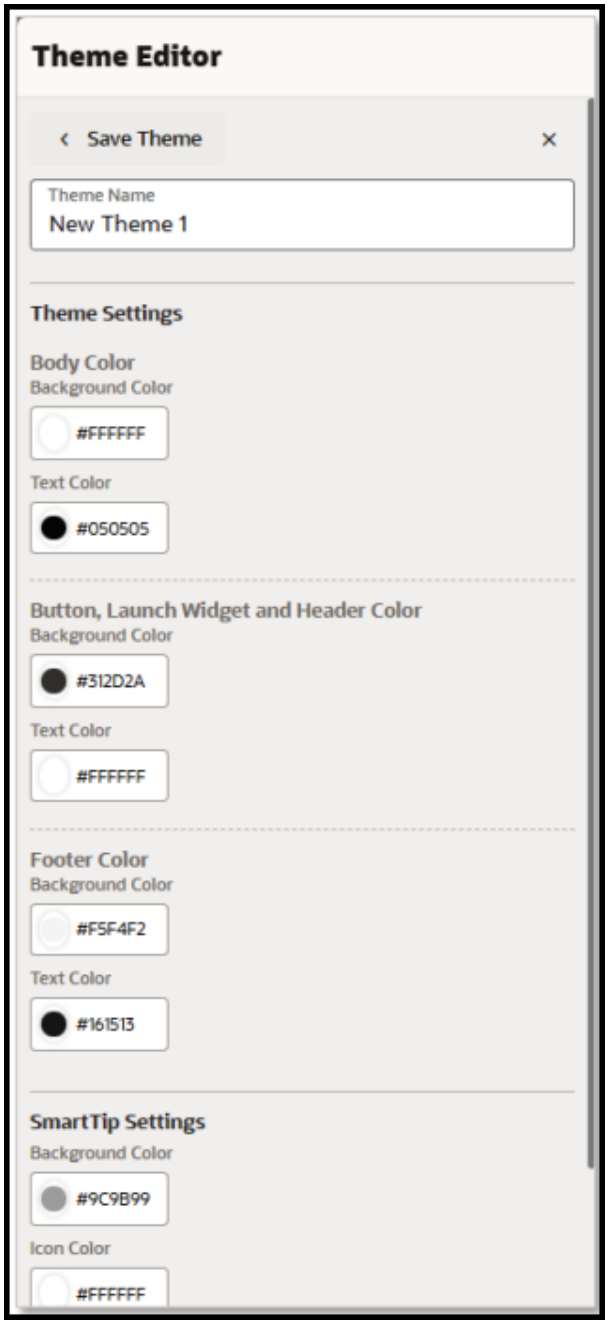

The following screenshots depict which theme elements will be affected by each theme setting:

Body Color – Background and Text:

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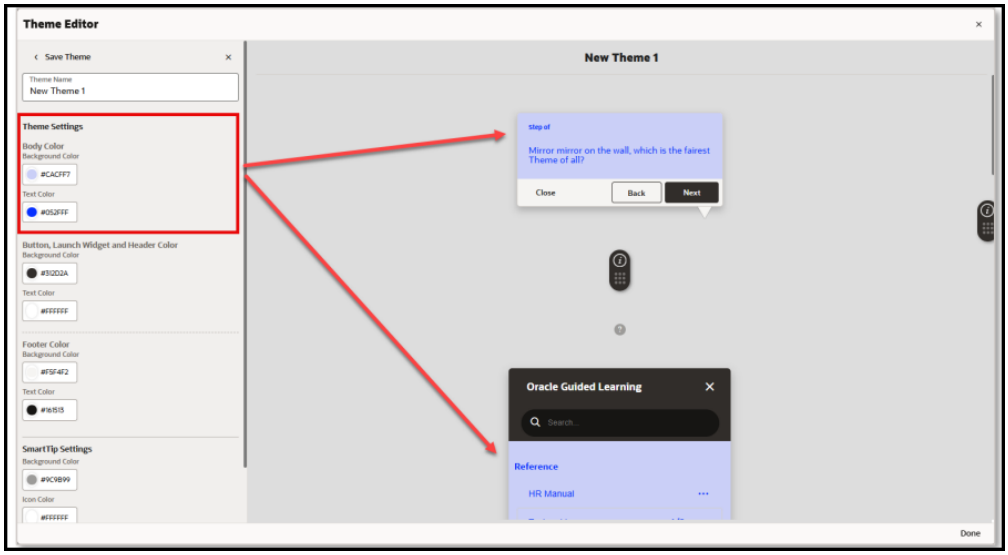
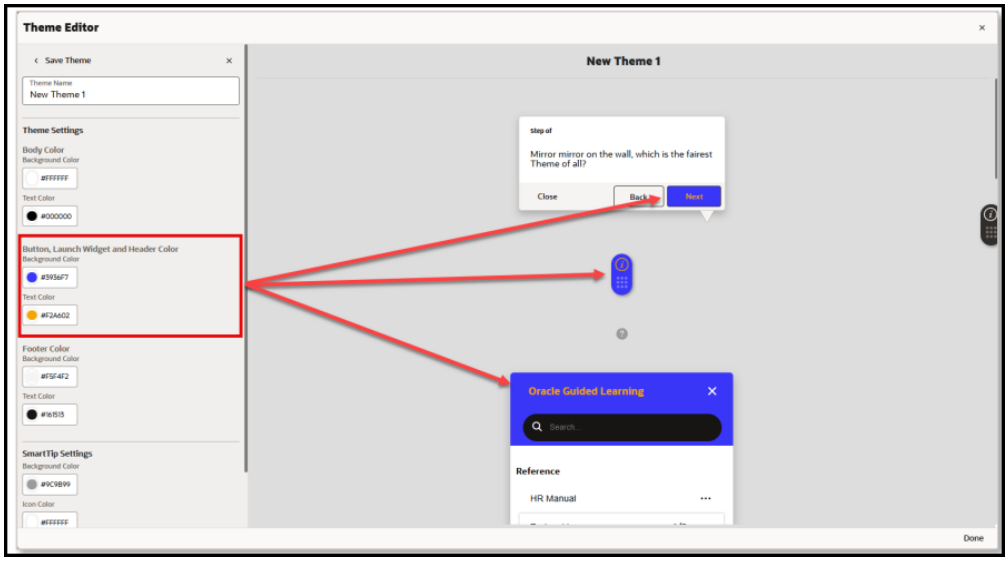


Button, Launch Widget and Header Color – Background and Text



Footer Color – Background and Text:

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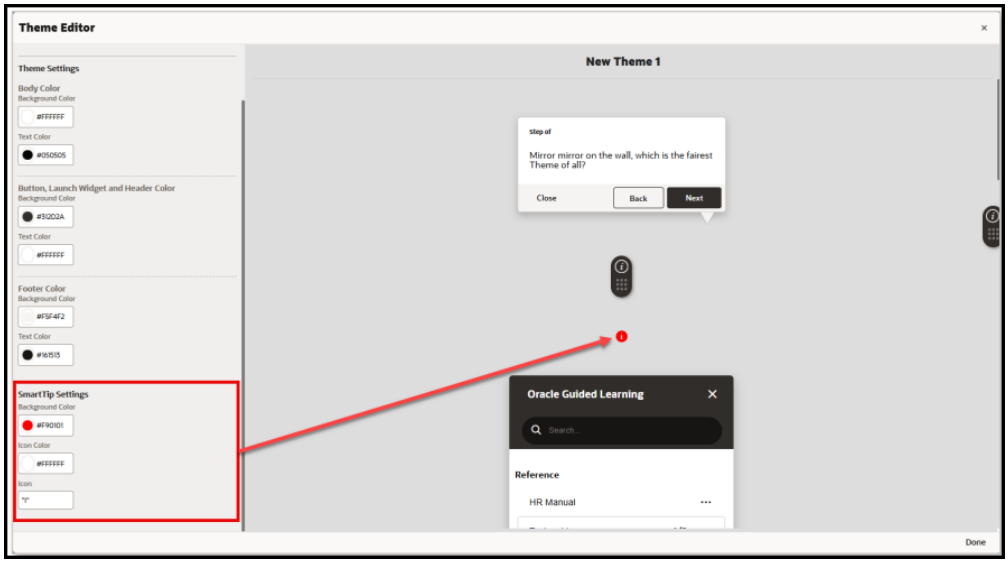
SmartTip Settings – Background Color, Icon Color, and Icon (character)



Using the Color Picker

To change the color for an element, select the circle on the left of the color setting

to open the color picker. Colors can be selected by dragging the color slider to a desired hue, then selecting the desired shade of the color above. To pick a color, move your mouse cursor about the color picker (or use the arrow keys on the keyboard), then click on the desired color (or press ‘Enter’). Once selected, the color code will be displayed in the color field as a Hexadecimal code value.

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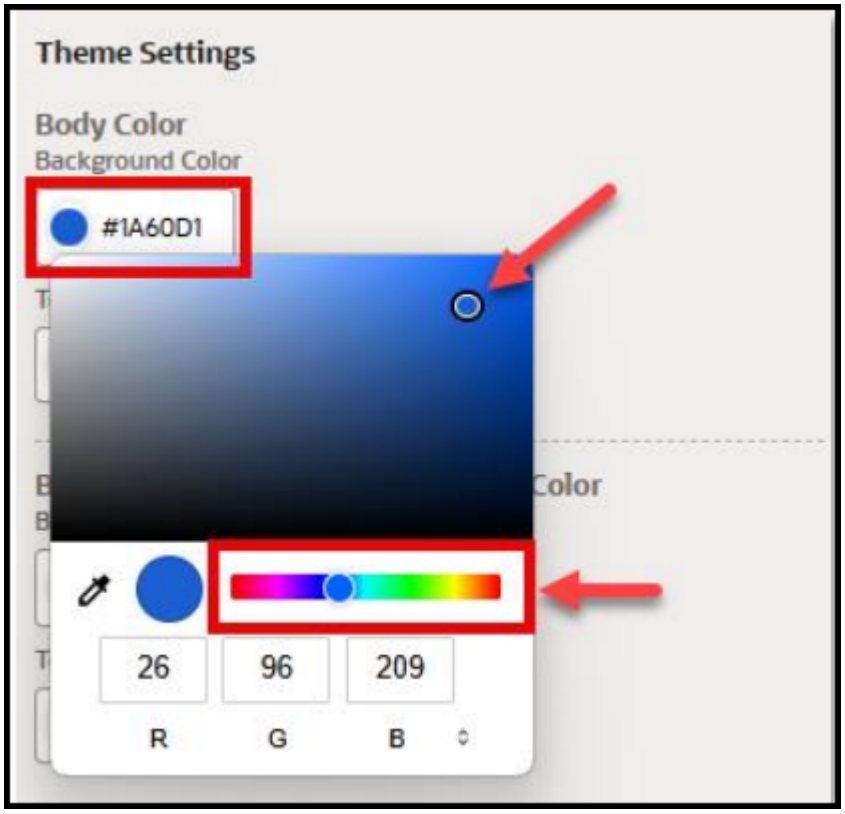
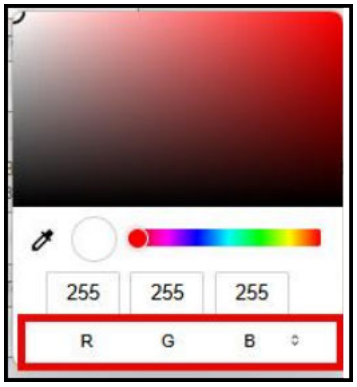


To change the color model, select the arrows ( ) to cycle between RGB, HSL, and HEX color modes.

RGB (Red, Green, Blue) Color Mode:



HSL (Hue, Saturation, Lightness) Color Mode:

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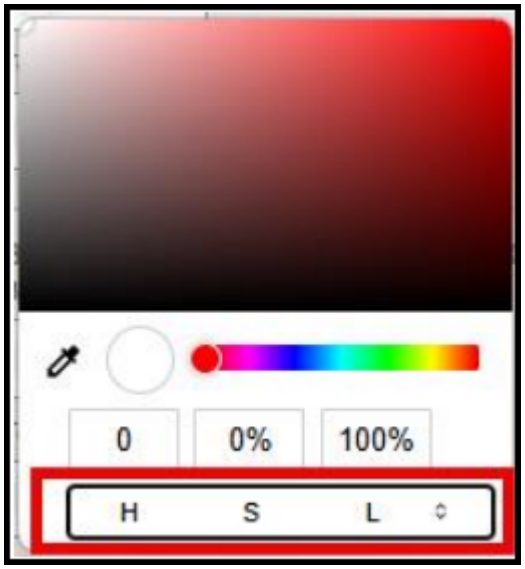

HEX (Hexadecimal Code) Color Mode:

> **Note**
>
> Colors can also be input as a Hex code, RGB, or HSL value directly into the color text field(s).

Sampling a color on the screen

You can also pick a color by sampling the color of any pixel from anywhere on your screen using the **Eyedropper tool.**

Select the **Eyedropper** to change your mouse cursor into a magnifier that zooms into a selected area( ). Move your mouse about the screen (or use the arrow keys) to position the

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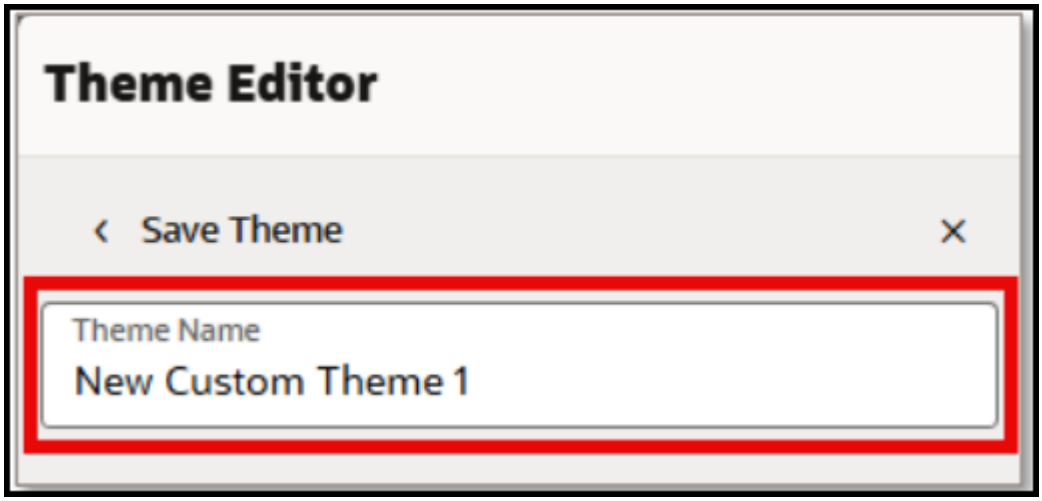
magnifier over any area of the screen. Place the center of the magnifier over a pixel containing the color you wish to sample and click the mouse button (or press the Spacebar) to sample that color. The color picker will update with the selected color code value.

> **Note**
>
> To cancel and exit out of the Eyedropper/Magnifier tool, press the Esc key.

Saving Your Theme

To save your theme changes, enter a name in the Theme Name field, then select **Save Theme.**



More Actions

Selecting the **More…**

button next to any theme will open the More Actions menu.

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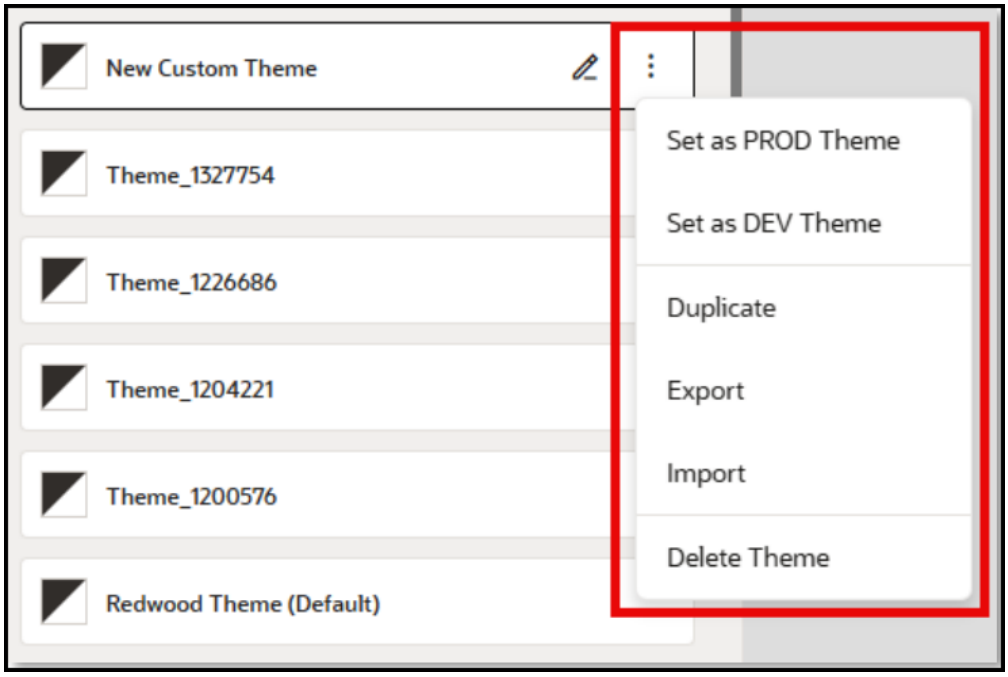

The following actions can be performed from the **More Actions** menu:

- **Set as PROD Theme** – Publishes the selected theme to the Production environment.
- **Set as DEV Theme** – Publishes the selected theme to the Development environment.
- **Duplicate** – Makes a copy of the selected theme and appends "- Copy" to the theme name.
- **Export** – Downloads the selected theme as an HTML file to your default Downloads folder.
- **Import** – Opens the Upload modal allowing you to select an existing OGL Theme HTML file to replace the selected theme

Border Settings in WYSIWYG Theme Editor

This new enhancement in the OGL Theme allows developers and administrators to easily customize Tip and Smart Tip borders through a user-friendly interface, eliminating the need to manually edit CSS in HTML files.

Tip Border Customization:

Set the border color and width for Tips in the Body Color section of Theme Settings. These settings apply to Tooltips, Feedback, and Task list components.

1. Navigate to Theme Editor.
2. Click **Create New Theme** or click the **Edit** icon to modify an existing theme.
3. In the **Body Color** section, locate the Border Color option to set the border color for Tooltips, Feedback, and Task list components.
4. Use the **Border Width** setting to define the thickness of the border in pixels.
5. Changes will be reflected immediately in the preview panel on the right.
6. Click **Save to Dev** and/or **Save to PROD** to apply the changes to the respective environments.

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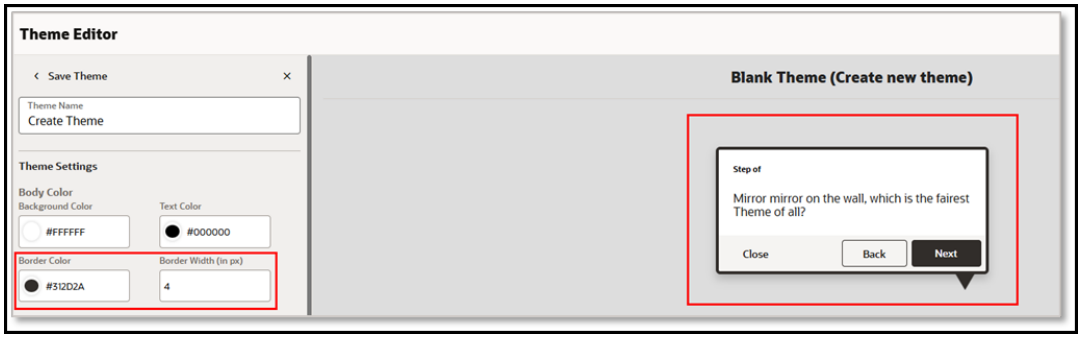

Smart Tip Border Customization:

Configure the border color and thickness for Smart Tips in the Smart Tip Settings section. This allows you to add and control the thickness of borders specifically for Smart Tips.

1. Navigate to the Theme Editor.
2. Select **Create New Theme** or click the **Edit** icon to update an existing theme.
3. In the **SmartTip Settings** section, find the **Border Color** option to customize the SmartTip border color.
4. Use the **Border Width** setting to specify the thickness of the SmartTip border in pixels.
5. All changes will be instantly visible in the preview panel on the right.
6. Click **Save to Dev** and/or **Save to PROD** to apply the updates to the corresponding environments.

Known Issues/Expected Behavior

Feature limitation: With OGL 25D Release, the following elements are not currently customizable using the Theme Editor:

- Search bar in the help panel
- Text area & Smiley's in the feedback modal
- Step guide menu drop-down in the player side
- Language menu drop-down in the player side
- Mouse hover color - Next button, Guide list & step guide launcher menu.

These theme elements and more will be customizable in future iterations of the Theme Editor. For now, users can still download their OGL Theme HTML file from which to make further customizations by editing the HTML code and CSS rules, as needed.

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Configuring Themes

OGL includes several default themes. You can also customize tip colors, fonts, and tip positions as per your branding requirements.

Download the Design Kit

The Design Kit provides the ability to update the theme however you want, this article is meant to provide some basic guidelines and covers updating some of the basic attributes of the theme and does not cover advanced CSS methods.

1. On the OGL Console homepage, go to the left navigation panel.
   You can see the **Settings** tab on the navigation panel.
2. Click the **Settings** tab, list of options are displayed.
3. Select **Theme**in the left navigation panel.

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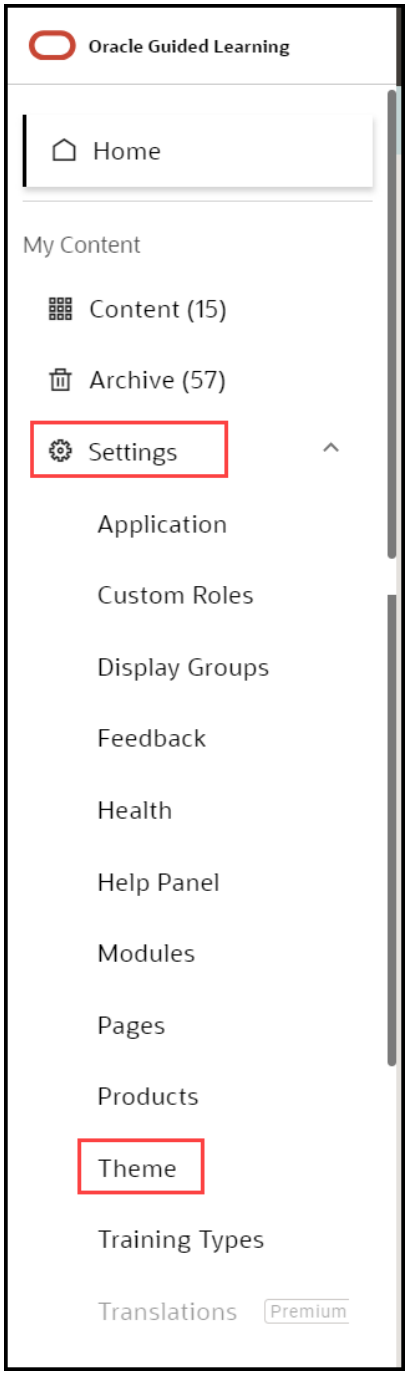

4. Select the Upload/Download Theme tab.
The following interface is displayed.

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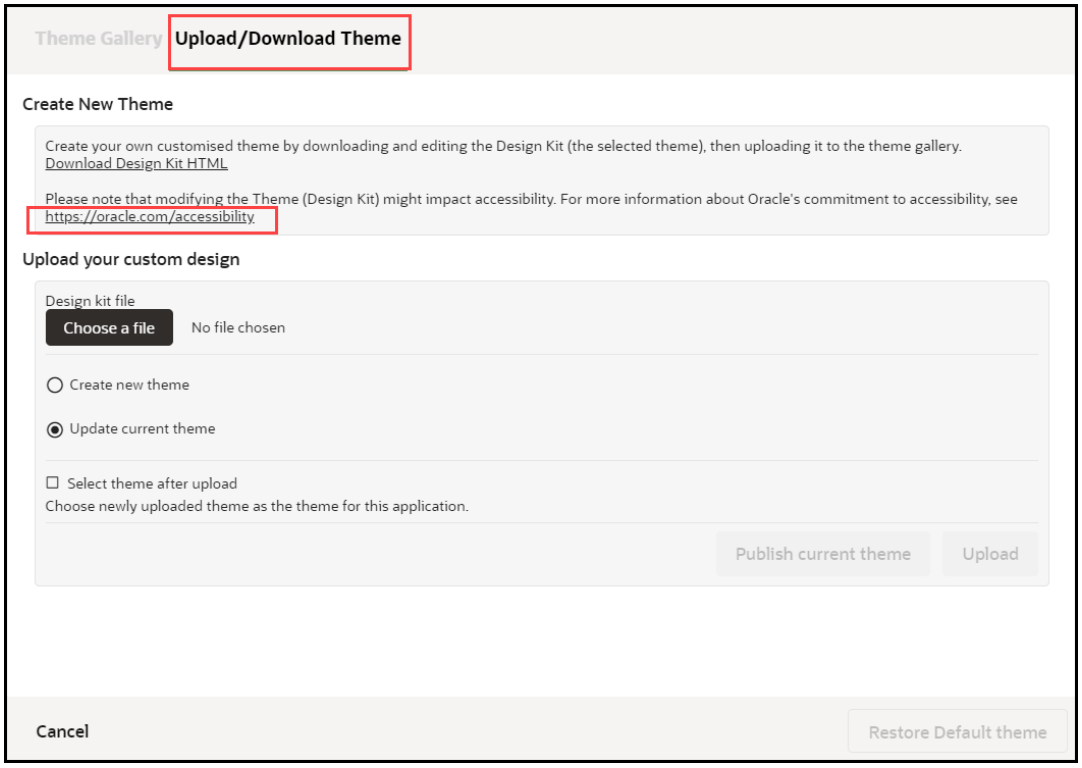

5. Click **Download the Design Kit HTML** link.
   This will download as file "OGL_Theme_Design_Kit..." HTML file. Ensure you rename the file accordingly.
6. Save the HTML file to a local directory.
   Note: Rename the file accordingly, our recommendation is to rename it using the following convention: Design_Kit_ORGNAME_DD_MMM_YYYY

Update the Design Kit

To update the design kit, you will need to use a suitable text/HTML editor.

1. Open the Design Kit in a browser
2. Open the same file with the HTML/text editor
3. Find the CSS class and update the relevant attributes
4. Save the changes, then refresh the Design Kit in the browser to preview the changes before uploading them to the OGL Console

Upload the Design Kit

1. Select the **Content** tab in the OGL Console
2. Select **Theme**in the left panel

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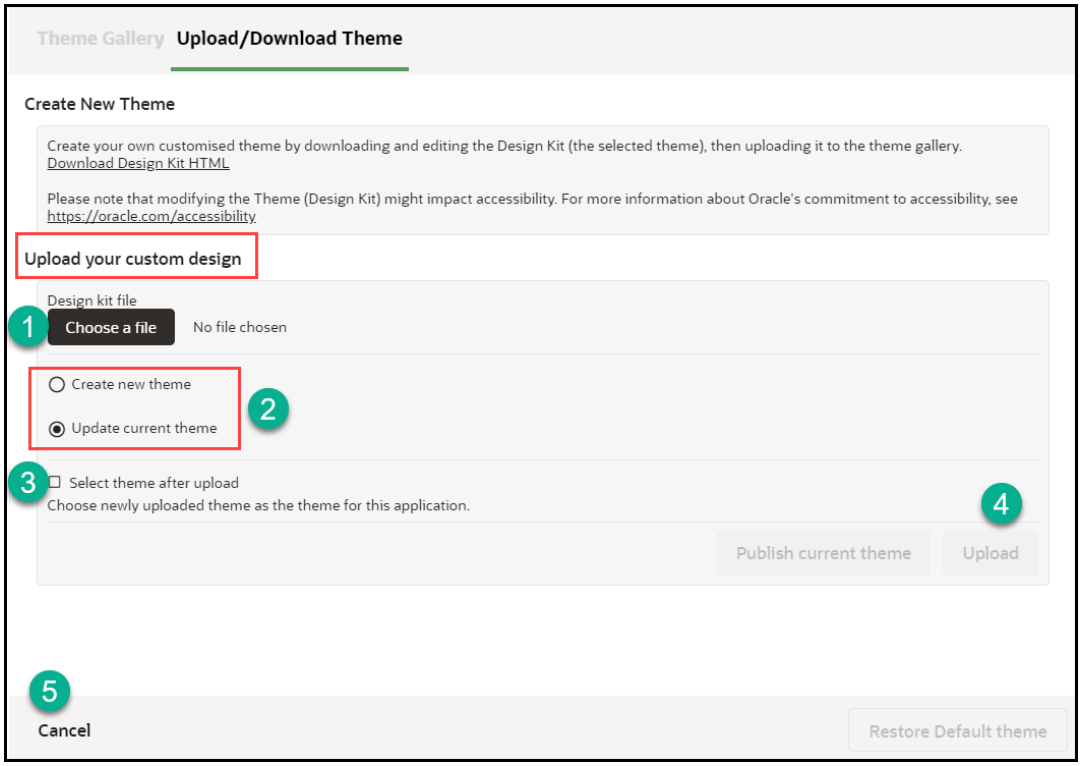

3. Select **Upload Theme**
4. Select **Choose File** (A), then select the file saved in your local directory.
5. Select **Create new theme** (B). Note: Select Update current theme if you are updating an existing custom theme
6. Check the **Select new theme** after upload check-box

Common CSS Rules in the Guided Learning Theme

This article lists the most common CSS rules which can be updated to change the Guided Learning theme to suit your brand identity. The below CSS rules should be updated/inserted in the design kit.

> **Note**
>
> This serves as a guideline.

To update the colors of the Guided Learning tooltips, find the expected Hex codes, then replace them with your preferred codes:

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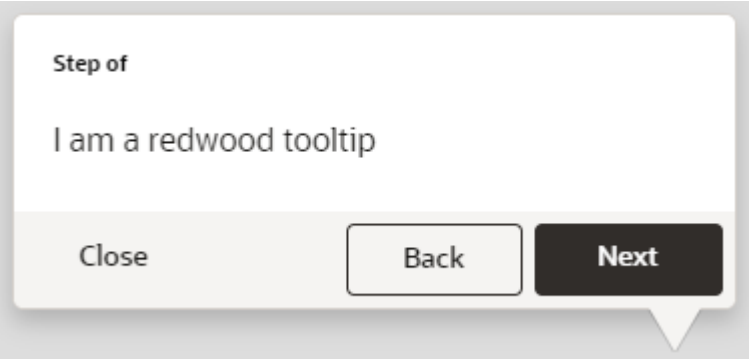
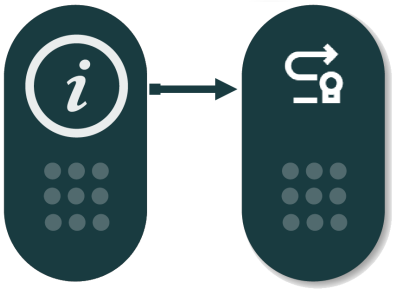


Swatch	Find	Replace with
	#3E3834	Your own Hex code
	#F5F4F2	Your own Hex code

Note: Perform a Find & Replace to quickly update

Image Reference	CSS Rule

	`/*To change the color of the Help Widget*/`
	
	`.ogl-rw-widget {`
	`  background-color: ##3E3834;`
	`}`

	`/*To change the Help Widget Icon*/`
	
	`.ouc-widget__launch-icon {`
	`  background-image:`
	`url(REPLACE_WITH_ICON_URL);`
	`}`

	`/*To change color when you hover over the Help Widget*/`
	
	`.ogl-rw-widget--launch a:hover {`
	`  background-color: #F5F4F2;`
	`}`

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Image Reference	CSS Rule

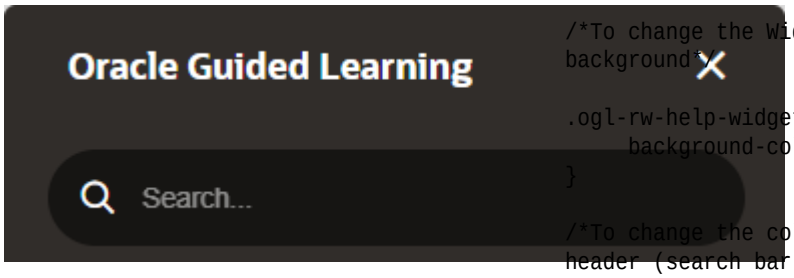	/*To change the Widget Help Panel header background*/
	
	.ogl-rw-help-widget-header--upper {
	background-color: #3E3834;
	}
	
	/*To change the color of Widget Help Panel header (search bar area)*/
	
	.ogl-rw-help-widget-header--lower {
	background-color: #3E3834;
	}
	
	/*To change the color of search bar input area*/
	
	.rw-searchbar {
	display: flex;
	flex-direction: row;
	align-items: center;
	padding: 0 15px;
	font-family: Oracle Sans;
	background-color: #F5F4F2;
	}

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Image Reference	CSS Rule

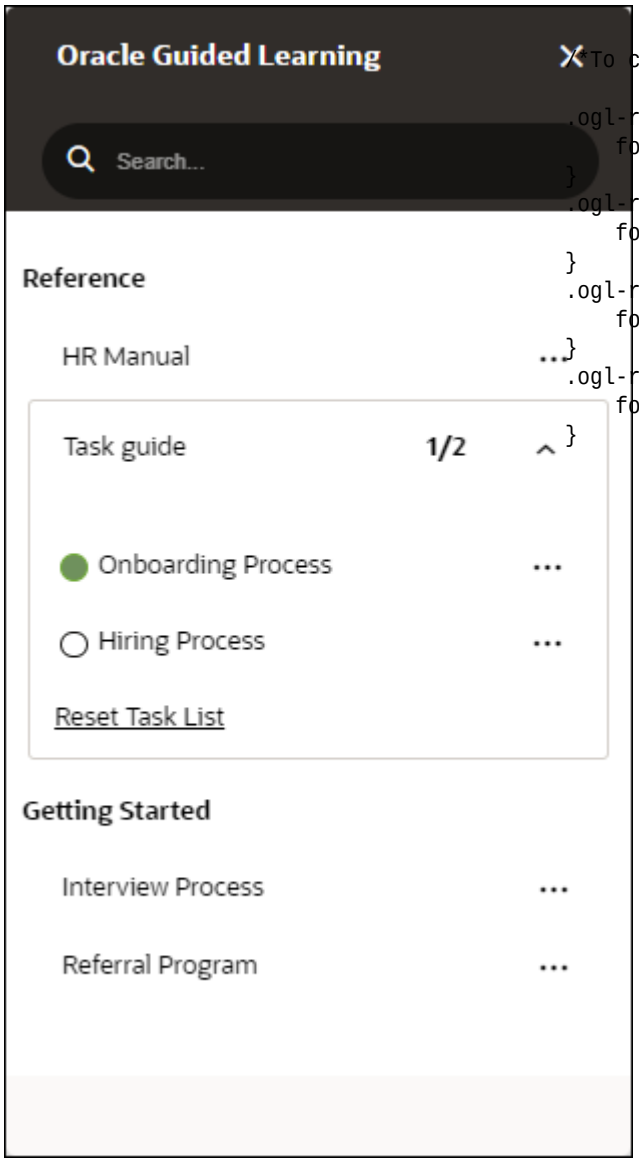	/*To change the font in help widget*/
	
	.ogl-rw-help-widget-item--title {
	font-family: sans-serif;
	}
	.ogl-rw-help-widget--content-group--title {
	font-family: sans-serif;
	}
	.ogl-rw-task-list-item--title {
	font-family: sans-serif;
	}
	.ogl-rw-task-list--reset{
	font-family: sans-serif;
	}

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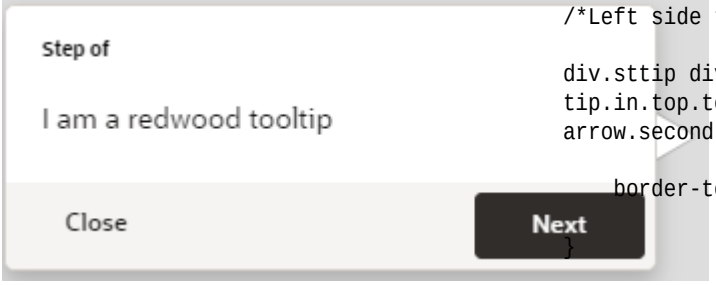
Image Reference	CSS Rule

	/*To make changes to tip footer*/
	
	div.sttip div.tooltip.ogl-rw-tip div.stFooter, div.sttip div.tooltip.ogl-rw-tip.ogl-rw-hovertip.showLaterBt div.stFooter {
	
	background: #3E3834;
	
	/*height: 48px;*/ /*For changing the padding height on tip footers*/
	
	}
	
	/*To make changes to Next Button, background colour and border color was changed to match with the button colour*/
	
	div.sttip div.tooltip.ogl-rw-tip div.stFooter .next-btn {
	
	background-color: #F5F4F2;
	
	border: 1px solid #F5F4F2;
	
	}
	
	/*To change the colour of Close Button text*/
	div.sttip div.ogl-rw-tip div[data-iridize-role='closeBtPane'] button {
	color: #FFFFFF;
	}
	
	/*Removing the Back Button Border and changing the colour of back button text*/
	div.sttip div.tooltip.showPrevBt.ogl-rw-tip .stFooter .default-prev-btn {
	color: #FFFFFF;
	border: none;
	}

Figure 5-1 Left side tip pointer




```
/*To make changes tip pointers, to match the colour of the tip pointers with either buttons or tip footer background*/

/*Left side tip pointer*/

div.sttip div.tooltip.ogl-rw-tip.in.top.top-left div.tooltip-arrow.second-arrow {

    border-top-color: #3E3834;
}
```


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Image Reference	CSS Rule

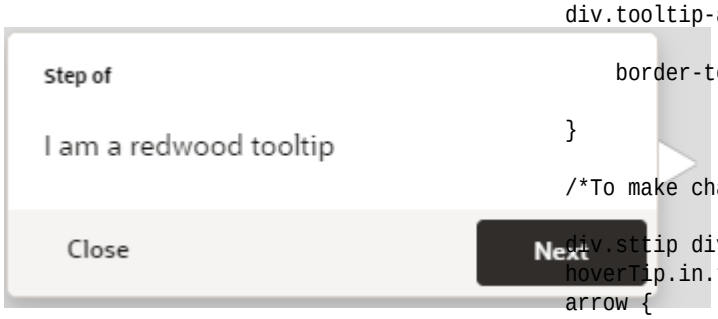
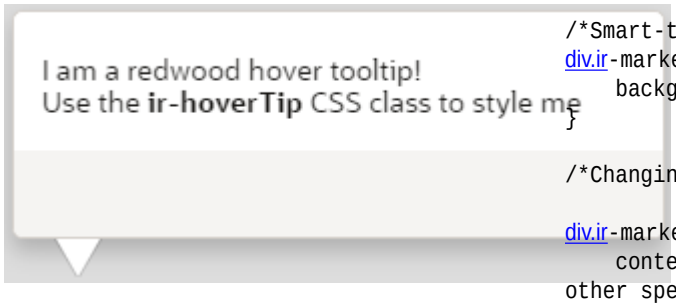
Figure 5-2 Right side tip pointer
 
 
 	
	/*To make changes to second arrow*/
	
	div.sttip div.tooltip.ogl-rw-tip.in.top div.tooltip-arrow.second-arrow {
	
	border-top-color: #3E3834;
	
	}
	
	/*To make changes to right side arrow*/
	
	div.sttip div.tooltip.ogl-rw-tip.ir-hoverTip.in.top div.tooltip-arrow.second-arrow {
	
	border-top-color: #3E3834;
	
	}
	
	/*Smart-tip color*/
	div.ir-marker {
	background-color: #3E3834;
	}
	
	/*Changing the icon of the smartitp*/
	
	div.ir-marker:after {
	content: '?';(Change the "?" to any other special character)
	}
	
	/*To change the Remind me later button color, border color and background color*/
	
	div.sttip div.tooltip.ogl-rw-tip.showLaterBt button[data-iridize-role='laterBt']{
	border: solid 1px #F5F4F2;
	background: #F5F4F2;
	}

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Image Reference	CSS Rule

	`/*To change the color of the Step Guide view border*/`
	
	`.iridize-step-guide-frame {`
	`  border-right: solid 5px #00AAFF;`
	`}`
	
	`/*To change the font of step guide*/`
	
	`.ogl-step-guide--step--caption {`
	`  font-family: sans-serif;`
	`}`
	`.ogl-rw-step-guide--title {`
	`  font-family: sans-serif;`
	`}`

	`/*to change the Step Guide Exit Button Color*/`
	
	`.ogl-rw-step-guide--footer--exit-btn {`
	`  background-color: #00AAFF;`
	`}`

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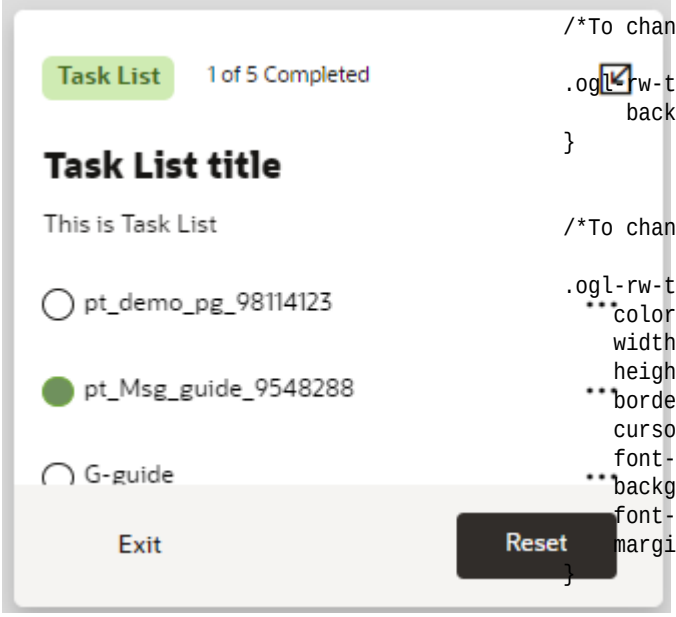
Image Reference	CSS Rule

	/*To change color of the task list footer*/
	
	.ogl-rw-task-list--footer {
	background-color: #3E3834;
	}
	
	/*To change task list exit button*/
	
	.ogl-rw-task-list--footer--exit-btn {
	color: white;
	width: 88px;
	height: 36px !important;
	border: none;
	cursor: pointer;
	font-size: 13.75px;
	background-color: transparent;
	font-weight: 600;
	margin-left: 16px;
	}
	
	/*To change task list reset button*/
	
	.rw-btn {
	background: #F5F4F2;
	}
	
	/*To change the font for task list*/
	.ogl-rw-task-list--title {
	font-family: sans-serif;
	}
	.ogl-rw-task-list--desc{
	font-family: sans-serif;
	}
	.ogl-rw-task-list--header--completion-text{
	font-family: sans-serif;
	}

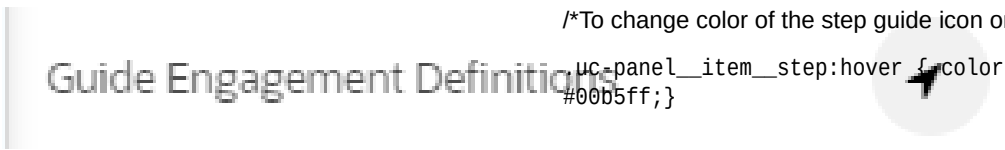
	/*To change color of the step guide icon*/ .uc-panel__item__step { color: #00AAFF;}
	/*To change color of the step guide icon on hover*/ .uc-panel__item__step:hover {color: #00b5ff;}

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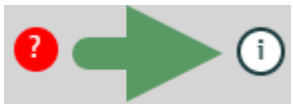
Image Reference	CSS Rule

	/*To change the smart tip an i with a matching border find div.ir-marker in the theme and replace with the below*/
	`div.ir-marker {`
	`  /*changing this will affect the color of the help icon*/`
	`  background-color: #FFFFFF;`
	`  border: 2px solid #1b3b3f;`
	`  border-radius:15px;`
	`  font-weight: bolder;`
	`  font-size: 14px;}`
	
	/*To change the ? to an i find div.ir-marker:after and replace with the below*/
	`div.ir-marker:after{`
	`  content: 'i';`
	`  color: #1b3b3f;}`

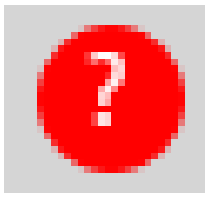
	/*To change the background color*/
	`div.ir-marker {`
	`  background-color: #12bc8d;`
	`}`
	
	/*To change the ? to another letter, add the following CSS rule to the design kit if it doesn't already exist*/
	`div.ir-marker:after {content: 'i';}`
	
	/*To change the ? to my own custom image, add the following CSS rule to the design kit if it doesn't already exist*/
	`div.ir-marker:after {content: none;}`
	
	`div.ir-marker {`
	`background: url(data:[your image goes here])`
	`  no-repeat`
	`  left center;`
	`}`
	
	/*You can use the following service to get the Data URI of your image - https://dopiaza.org/tools/datauri/index.php*/

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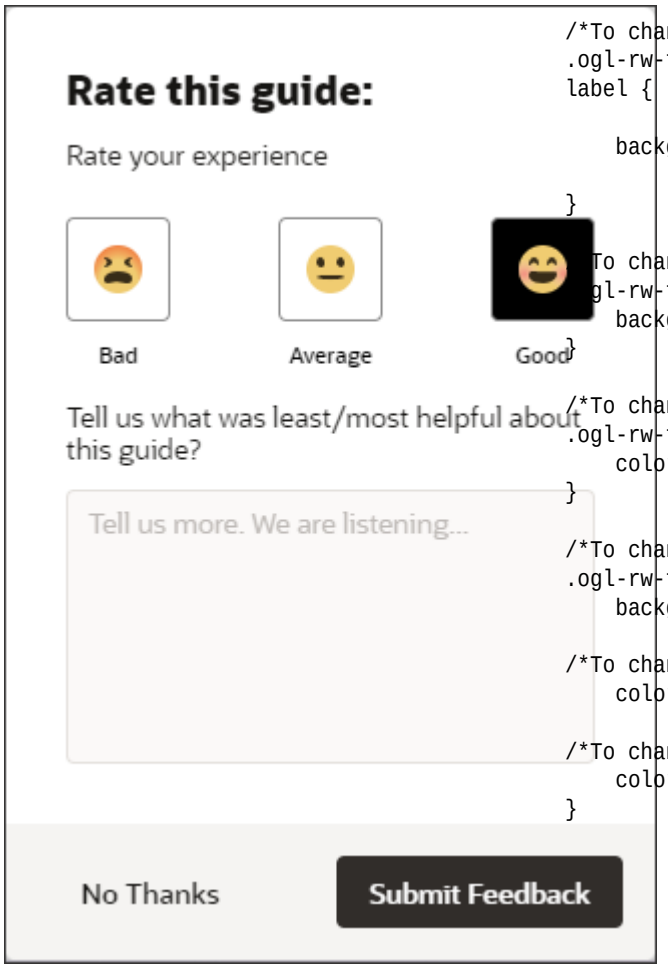
Image Reference	CSS Rule

	`/*To change feedback hover over color*/`
	`.ogl-rw-feedback--rating > input:checked + label {`
	`background-color: #F5F4F2;`
	`}`
	`/*To change feedback footer color*/`
	`.ogl-rw-feedback--footer{`
	`background-color: #3E3834;`
	`}`
	`/*To change Feedback No Thanks Button*/`
	`.ogl-rw-feedback--no-outline-btn {`
	`color: #3E3834;`
	`}`
	`/*To change Feedback Submit Button*/`
	`.ogl-rw-feedback--fill-btn {`
	`background-color: #F5F4F2;`
	`/*To change the button color*/`
	`color: #FFFFFF;`
	`/*To change color text within button*/`
	`color: #FFFFFF;`
	`}`

Custom CSS Rules for Guided Learning Theme

Enabling Multiple Styles in the same Guide

Guided learning allows for custom CSS classes where there is a requirement to have different formatting for tips or help icons within the same guide (or even the same step). An example of this would be having a different look for Smart Tip with varying levels of information, you could have red, amber, and green alerts with varying information.

All of your CSS styles must go between the IRIDIZE_CUSTOM_THEME_START and IRIDIZE_CUSTOM_THEME_END comment lines in the Design Kit. Examples are in the table below. You can set your own class names (i.e. ORG_CUSTOM1 instead of RED_ALERT).

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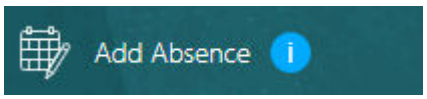
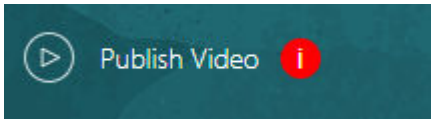
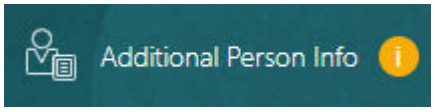
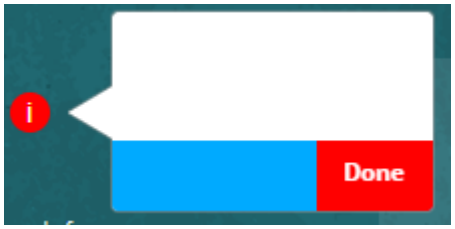
Reference Image	CSS Rule
	Theme default, no custom CSS
	/*The following code will result in the help icon having a red background when the RED_ALERT class is active*/ `div.RED_ALERT.ir-marker{background-color: red;}`
	/*The following code will result in the help icon having an amber background when the AMBER_ALERT class is active*/ `div.AMBER_ALERT.ir-marker{background-color: #F7AC08;}`
	/*The following code will result in the help icon having a green background when the GREEN_ALERT class is active*/ `div.GREEN_ALERT.ir-marker{background-color: #599964;}`
	Theme default, no custom CSS
	/*The following code will result in the Next and Done buttons being RED when the RED_BTN class is active*/ `div.sttip div.tooltip.RED_BTN div.stFooter [data-iridize-role="nextBt"] { background-color: red; }`
	/*The following code will result in the Next and Done buttons being AMBER when the AMBER_BTN class is active*/ `div.sttip div.tooltip.AMBER_BTN div.stFooter [data-iridize-role="nextBt"] { background-color: #F7AC08; }`
	/*The following code will result in the Next and Done buttons being GREEN when the GREEN_BTN class is active*/ `div.sttip div.tooltip.GREEN_BTN div.stFooter [data-iridize-role="nextBt"] { background-color: #599964; }`

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Reference Image	CSS Rule
Grey image missing	/*The following code will result in the back button being grey when the GREY_BTN class is active*/ `div.sttip div.tooltip.GREY_BTN div.stFooter [data-iridize-role="prevBt"] { background-color:grey; }`
	/*The following code will result in the help icon having a red level indicator as 5 when the RED_ALERT class is active*/ `div.RED_ALERT.ir-marker:after {content: "5";}`
	/*The following code will result in the help icon having a the $ when the GREEN_ALERT class is active*/ `div.GREEN_ALERT.ir-marker:after {content: "$";}`

Once the updates have been made, upload the Design kit to Guided Learning (see **Upload the Design Kit** in **Configuring Themes**).

Set the Custom CSS Class for Tooltips

1. Open the item with the OGL Full Editor
2. Expand the Display Settings section in Step Settings
3. Find the Custom classes field and set the custom class for the tooltip
   Note: Set multiple custom classes by separating the class name with a single whitespace (<custom_class_name_1><whitespace><custom_class_name_2><whitespace><custom_class_name_3>)

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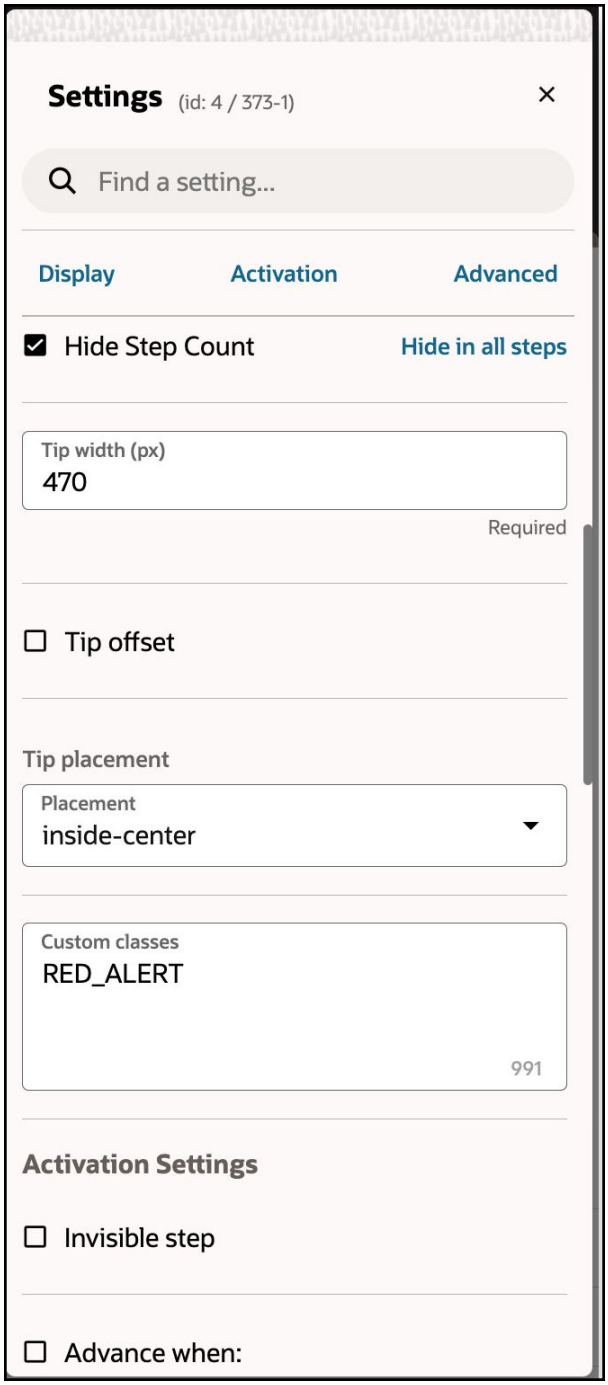

4. Save the changes and close the OGL Editor
5. Validate the changes in your test environment

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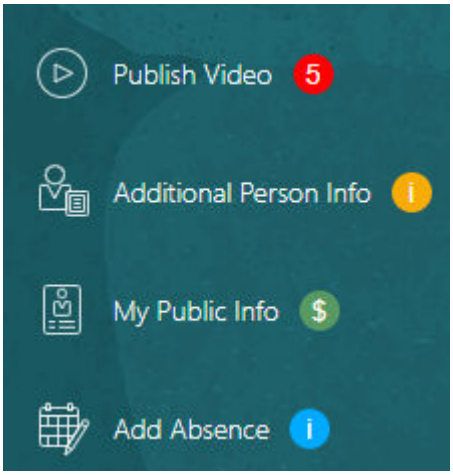

Translation

Oracle Guided Learning is a global platform that caters to users from diverse linguistic backgrounds. It is designed to be inclusive and accessible, allowing you to customize your guides in multiple international languages. The following articles explain the process of translating guides and managing multi-language guide content. Translation of guides allows you to dynamically control which language of the guide will be displayed to the end user. Once the guides are exported you can translate the relevant text in the provided files and import them back to OGL with the new language. You can translate your guides manually using an external translation service or use OGL's new Automated Machine Translation feature.

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Note

- Please remember that with OGL, translations are only available from the generic language of English to other languages. It is not possible to use machine or automated translation to translate guides that were originally created in other languages, including US English.
- Please make sure to create all content in the designated folder **Generic Language**.
- The guides in the Generic Language folder are the main guides, and all the edits are done in the main guide, like:
  - Additional steps, adding a smart tip, removing a step.
  - When creating English guides, it is crucial to consider the possibility of them being translated into foreign languages in the future. For this reason, the tip width of each step should be adjusted accordingly.
  - Adding additional selectors for foreign languages.
  - Text updates are done in the respective languages using the OGL Content Editor.
- To ensure a successful translation with Machine Translation and Automated Translation, each step in a guide should not exceed 5000 characters, including HTML tags. If a step is longer than 5000 characters, the translation attempt will fail and result in an error.
- Guides must be published or unpublished in all the foreign languages it was translated into.
- If you deactivate a guide in the default OGL language folder, it will also be deactivated in the foreign languages folder, and vice versa.

Multi-Language Functionality

The **Multi-Language** functionality allows you to create copies of an OGL guide (i.e., process guide, smart tip, etc.) into additional languages (i.e., An English worded OGL item can be made available in Dutch, French, etc.). With this feature, the original guide and all translated versions of the guide will all share the same **apiName.** Once the guide has been duplicated, you can export the guide contents and properties into a ZIP file to be translated using an external translation service. Once translated, you will be able to import the guide and properties back into your OGL content library to be deployed in their target languages for end users to consume.

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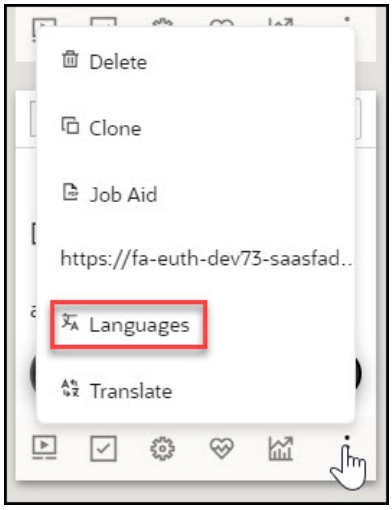
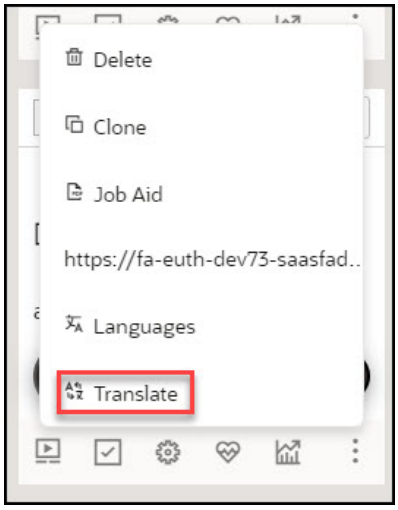


Tip

OGL's multi-language functionality supports supports over 290 languages.

Automated Machine Translation

Automated Machine Translation as an enhanced translation method. With this method, you can instantly translate guides into provided languages using AI machine translation directly from within the OGL console, without the need to export/import guides.



See the following subsections to learn more about how to translate your guides.

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Automated Machine Translation

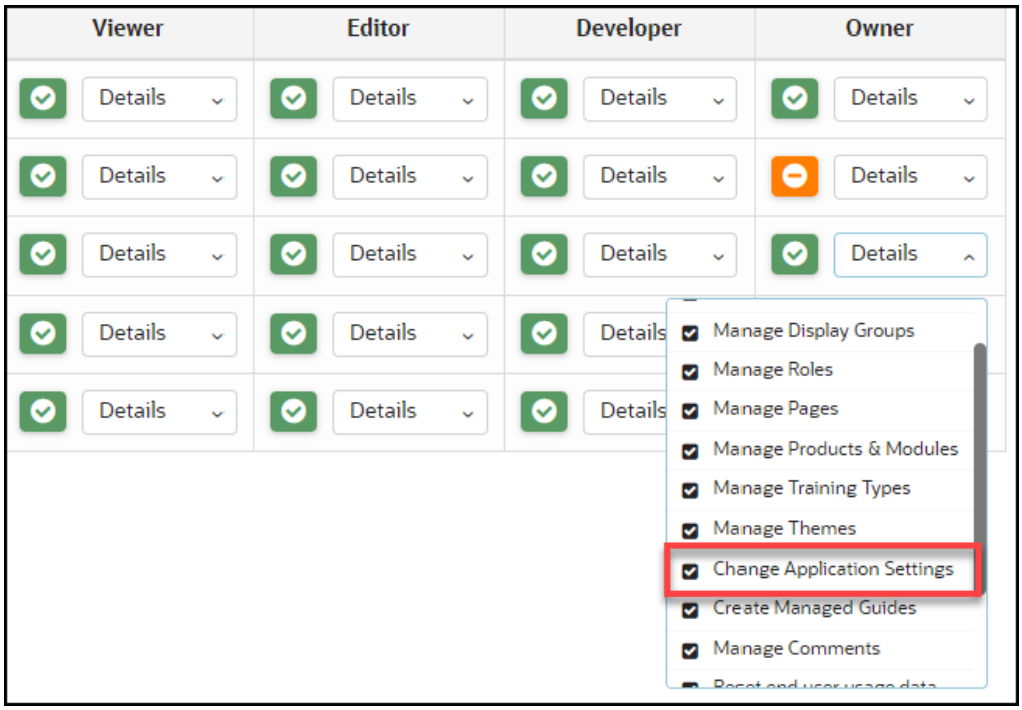
Improving upon OGL's existing multi-language support capabilities, the Automated Machine Translation feature allows content developers to instantly translate guides into any of the 31 supported languages using machine translation directly from within the OGL console, without the need to export/import guides.

This feature employs the OCI Language Translation service to allow OGL content developers to quickly and efficiently translate their guides into any of the supported languages listed below, without the need to export/import guide content.

When using Automated Machine Translation, consider the following:

- Currently, OGL supports 31 languages (see OGL Supported Languages below).
- This feature will only translate guide contents, not application properties or selectors. (See Translating Application Properties section below.)
- Each translation is subject to a character limit of 5,000 characters per step (including HTML tags).
- If the selected Generic Language is not on the list of available languages as listed in the Translation dialog box, the translation will fail and return an unspecified error message.

> **Note**
>
> This feature requires the following OGL security role and permissions: **Owner role → Change Application Settings permissions**



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OGL Supported Languages

OGL uses OCI's Language Translation Services and supports machine translation for the following languages. Additional languages may be added with future enhancements to this feature:

- Arabic
- Chinese-China
- Chinese-Taiwan
- Croatian
- Czech
- Danish
- Dutch
- Finnish
- French
- French-Canada
- German
- Greek
- Hebrew
- Hungarian
- Italian
- Japanese
- Korean
- Norwegian
- Polish
- Portuguese
- Portuguese-Brazil
- Romanian
- Russian
- Slovak
- Slovenian
- Spanish
- Swedish
- Thai
- Turkish
- Vietnamese

Translating Individual Guides

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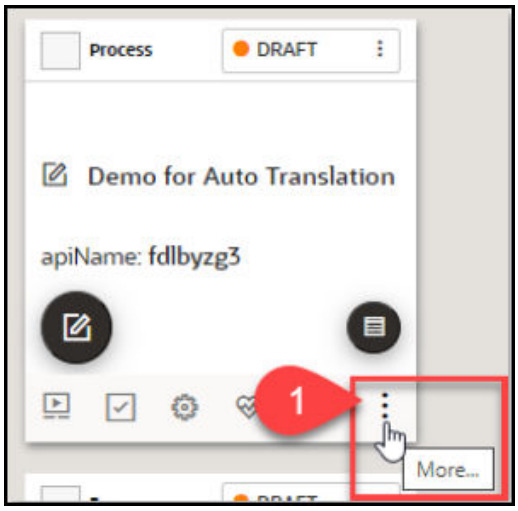
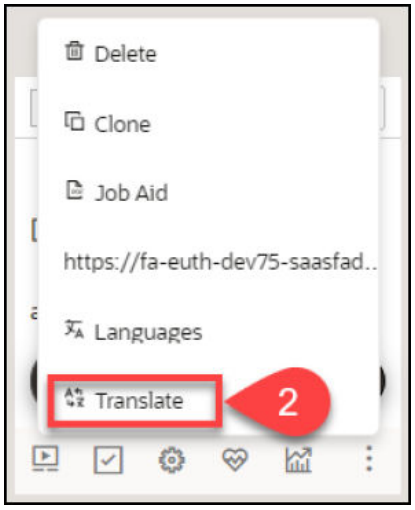
1. From the **My Content** page, select the "**More…**" icon in the lower right corner of the guide you wish to translate.



2. Select **Translate** from the actions menu.



3. The **Translation** modal opens.

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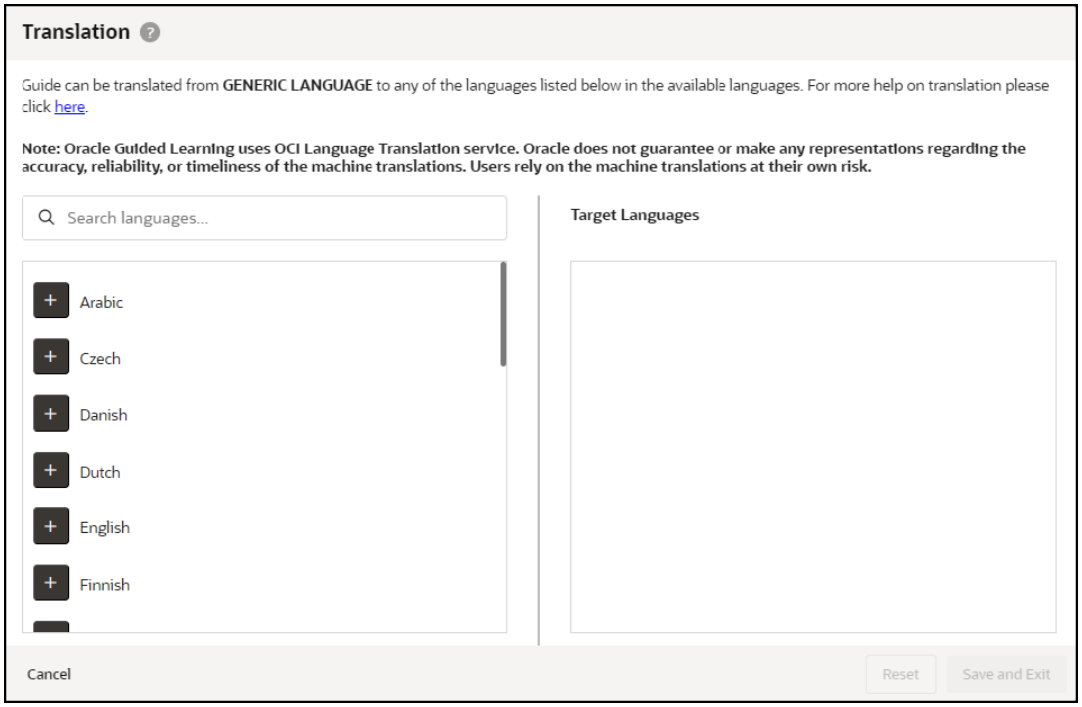
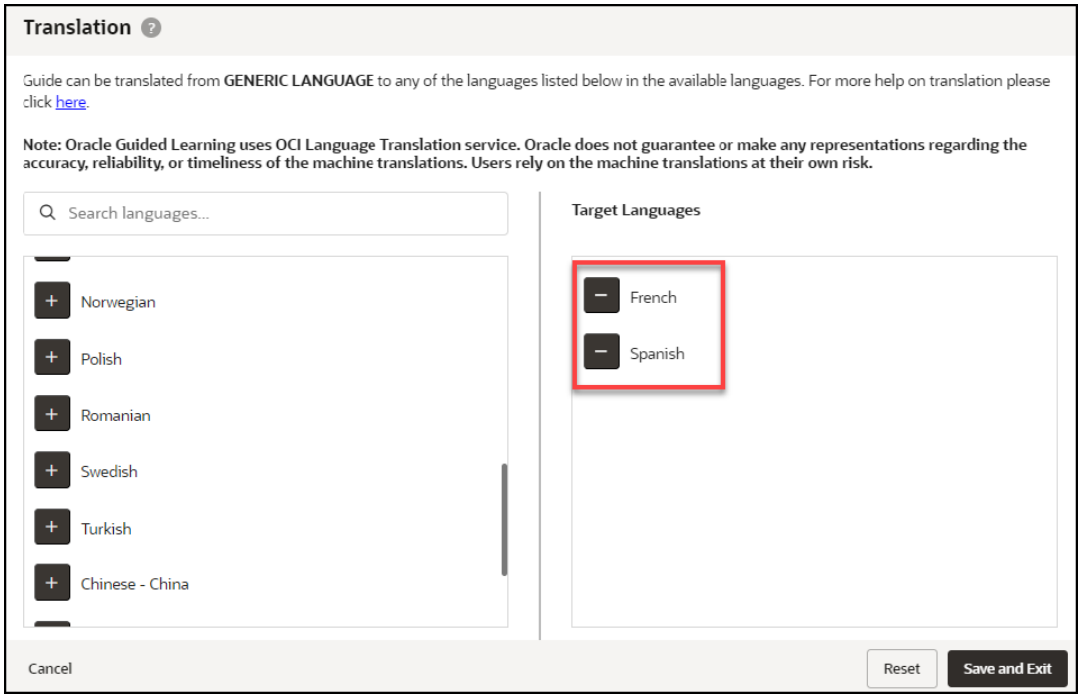


4. Select the "**+**" button next to the language(s) you wish to translate the guide from the list of available languages on the left. Any selected languages will appear in the Target Languages, then select **Save and Exit** when done.



5. A confirmation dialog box will appear (read carefully) and will prompt you to confirm the action.

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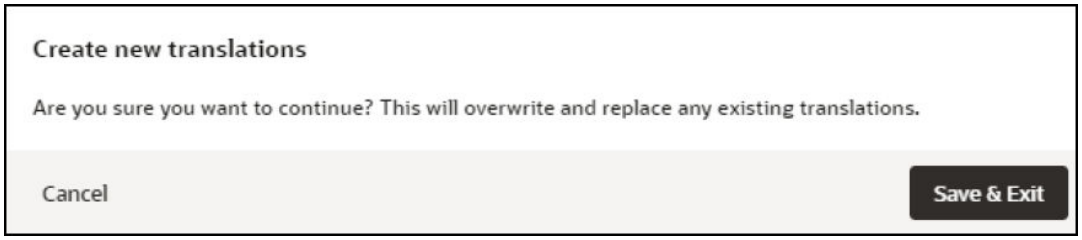
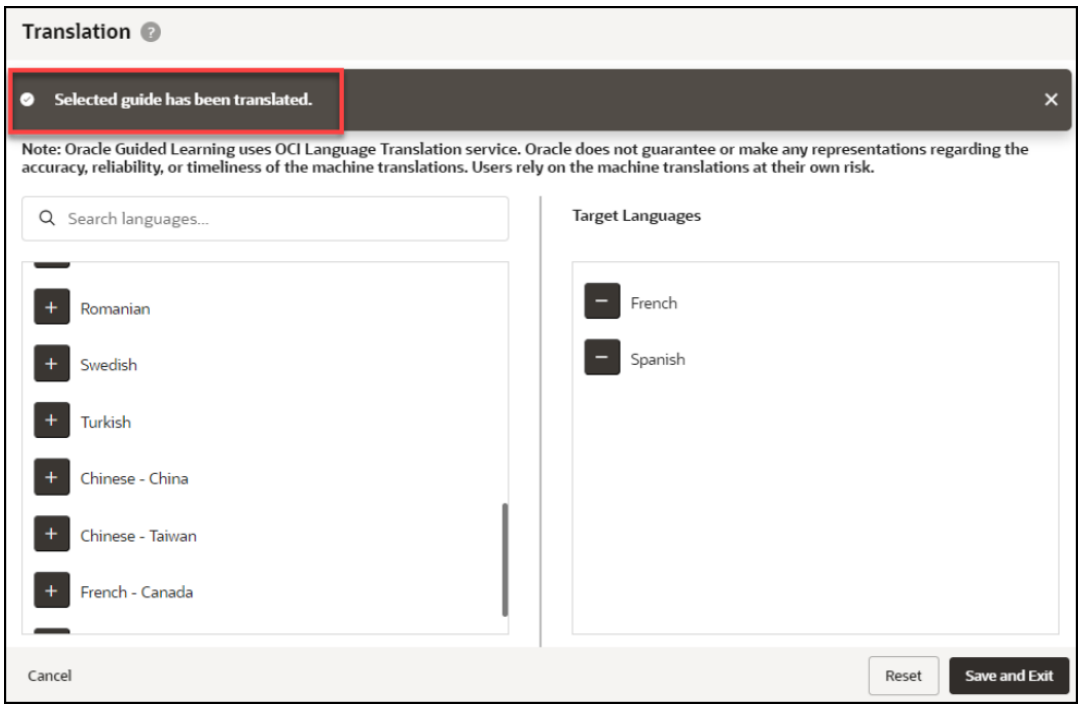
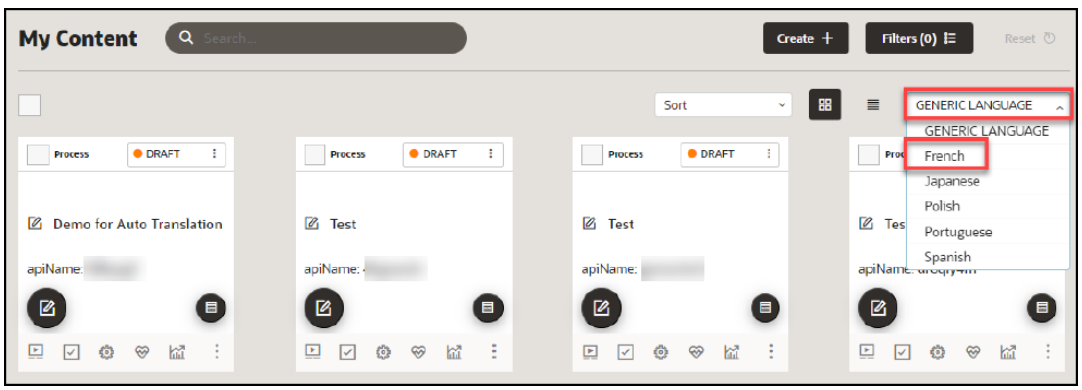


6. Once the translation is complete, a confirmation message will appear at the top of the Translation modal to confirm that the guide has been translated.



> **Note**
>
> Translations cannot be undone. To restore the guide to a previous version, use the Version History in the Guide Status.

7. The translated guides will now appear in their respective language folders in the My Content page. To toggle between each language folder, select the language drop-down menu.



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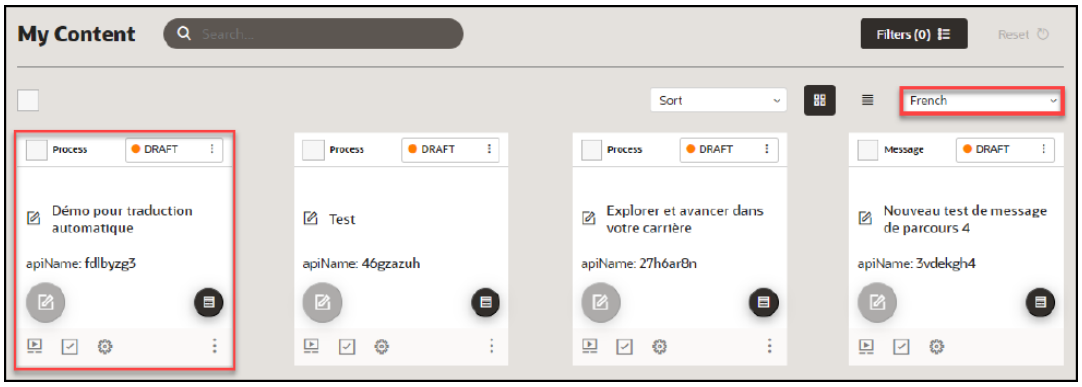
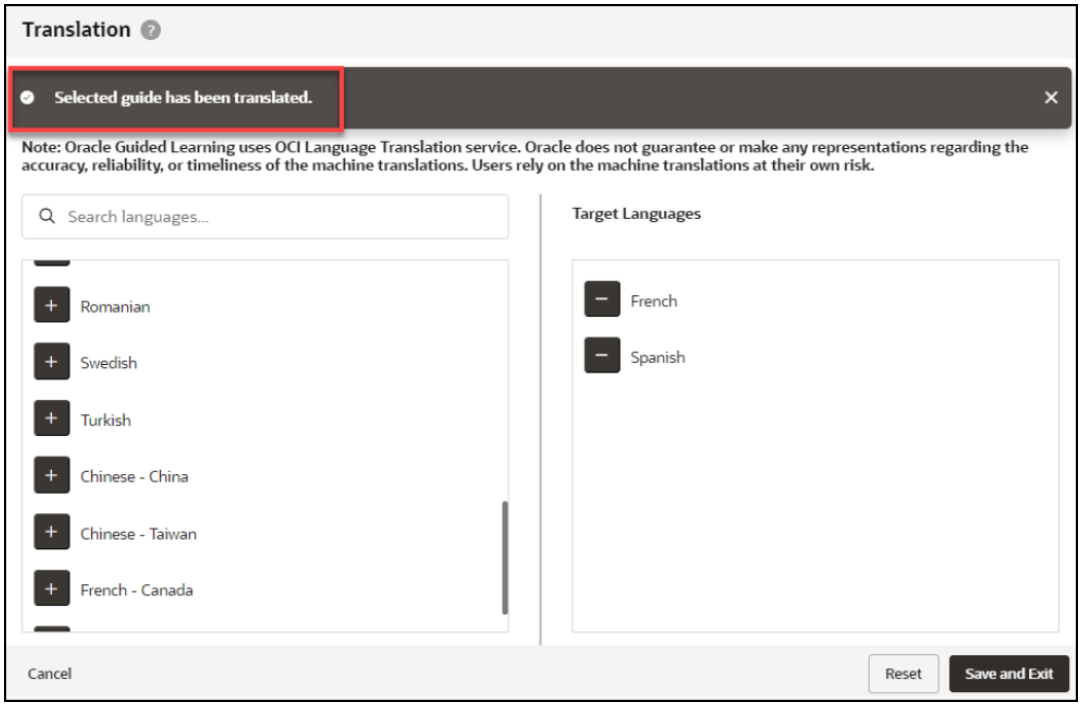


8. If you make any content changes to the original guide and then translate the guide again, you will be prompted with an option to retranslate the guide for all target languages.



Translating Multiple Guides (Bulk Action)

1. From the **My Content** page, select one or more guides that you wish to translate, then select **Translate** from the Bulk Actions dropdown menu.

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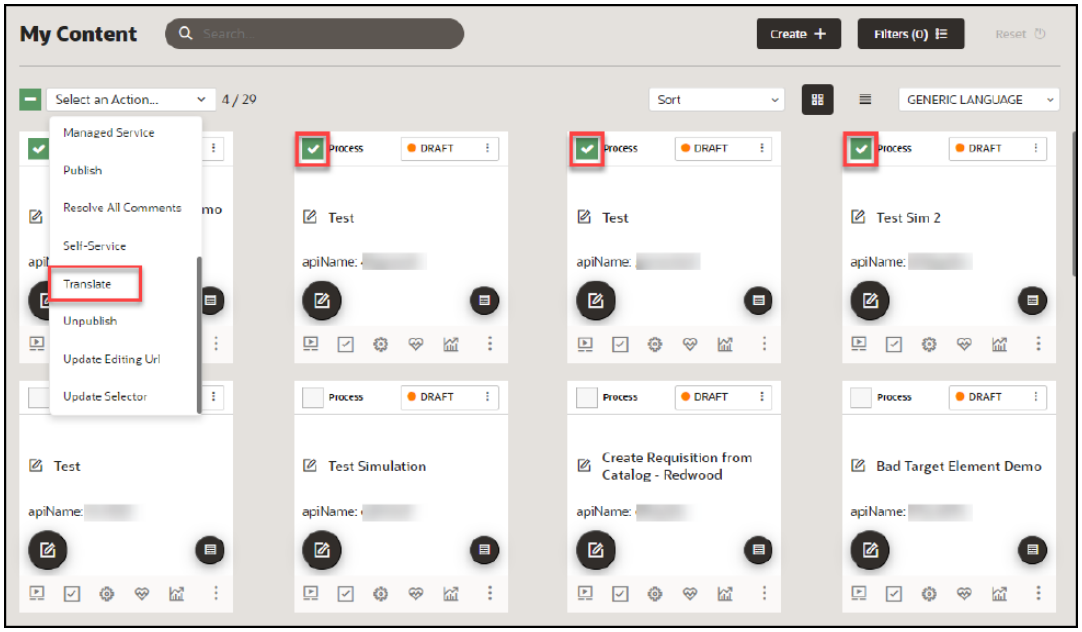
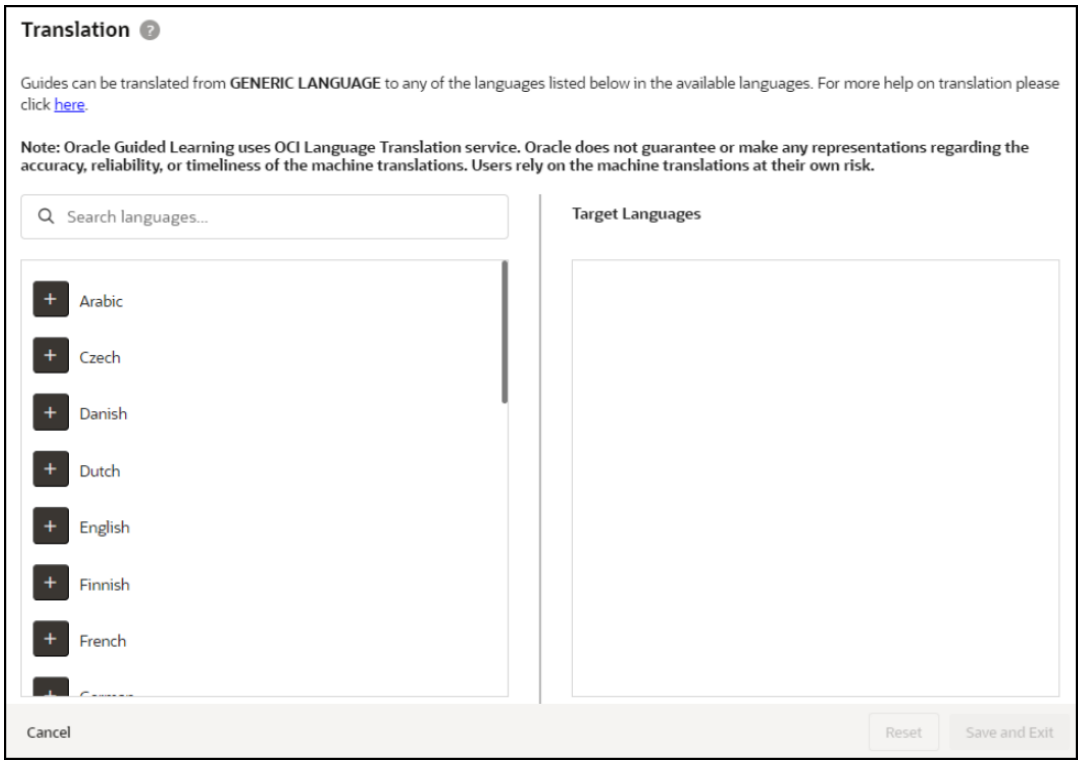


2. The Translation modal opens.



> **Note**
>
> With bulk translations, any pre-existing translated languages will not be displayed in the Target Languages column. Any translations applied using Bulk Actions will affect all selected guides and will overwrite any existing translations. To translate specific guides into specific languages, consider translating the guide(s) individually.

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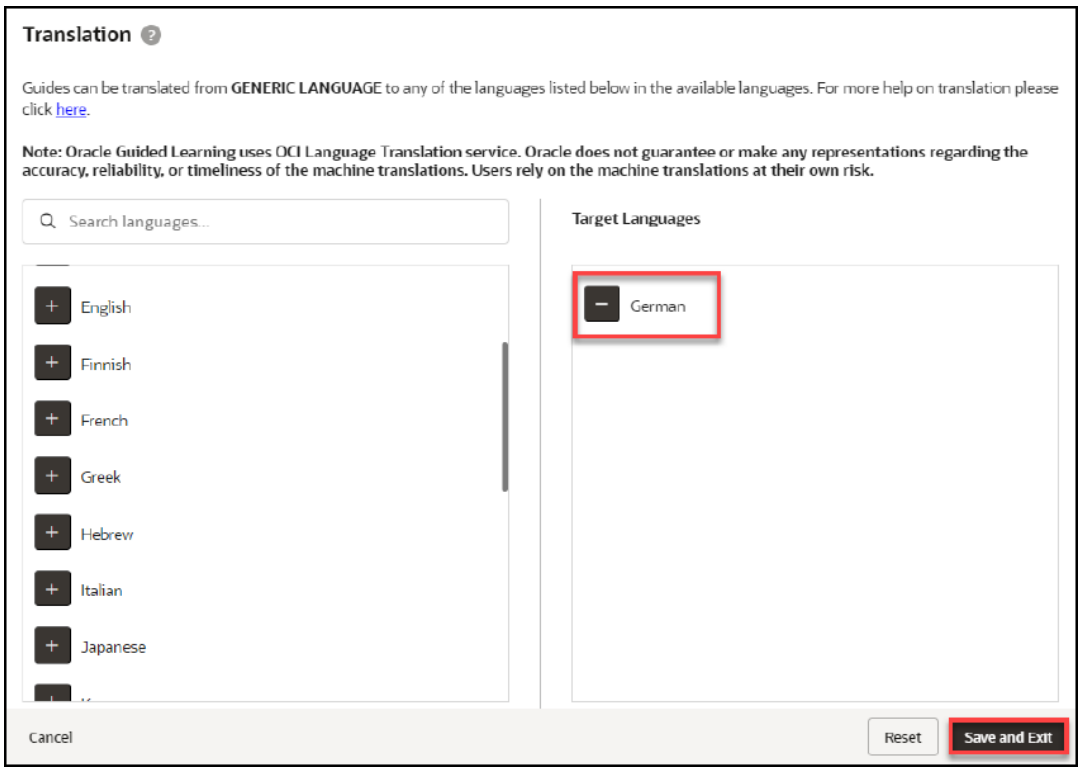
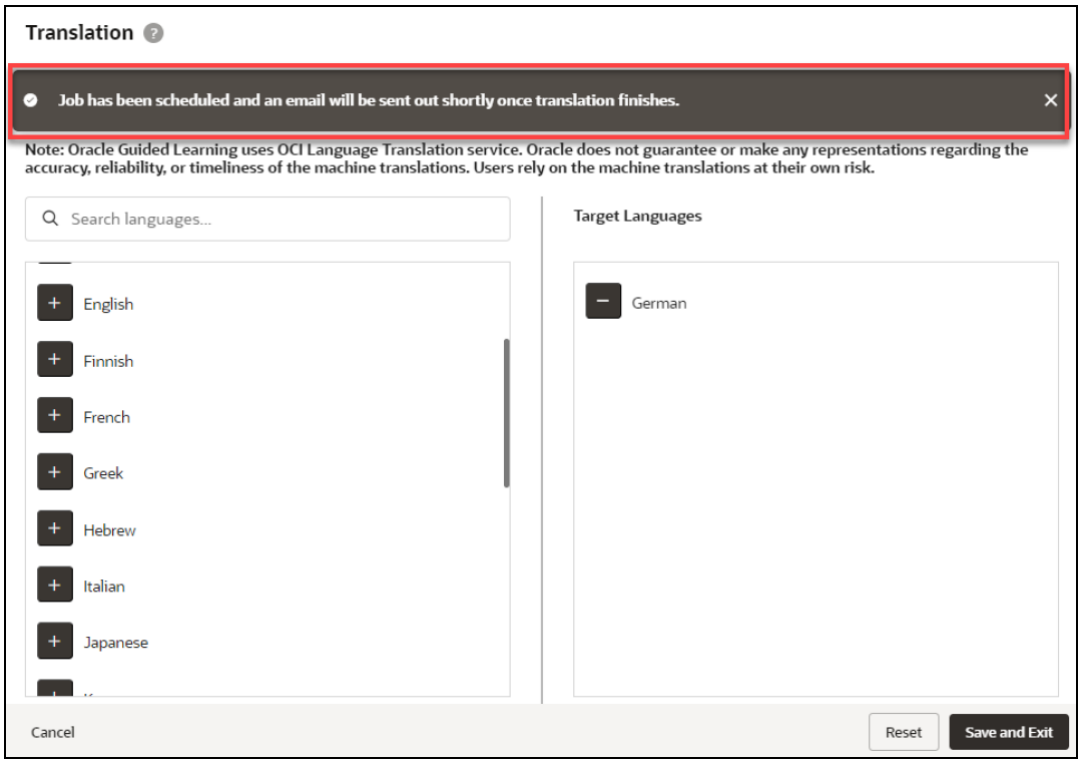
3. Select the "**+**" button next to the language(s) you wish to translate the guide from the list of available languages on the left. Any selected languages will appear in the Target Languages, then select **Save and Exit** when done.



4. Once the translation is complete, a confirmation message will appear at the top of the Translation modal indicating that the job has been scheduled and that an email will be sent to notify you when completed.



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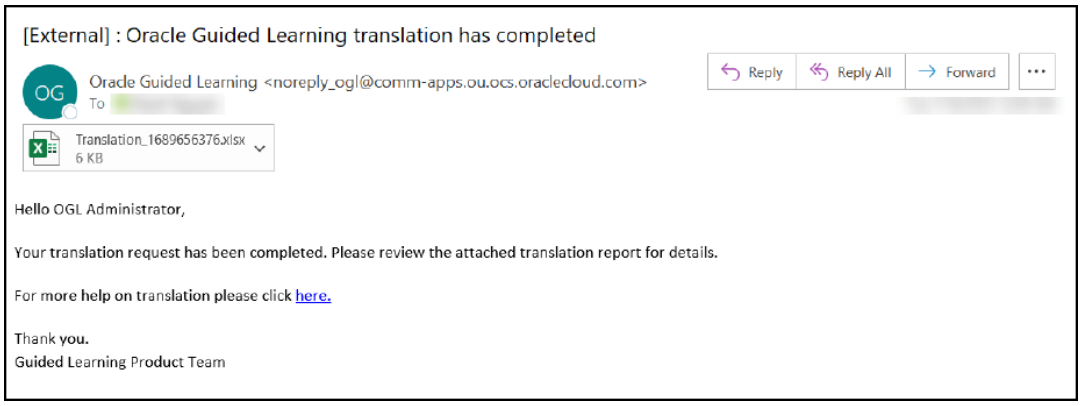
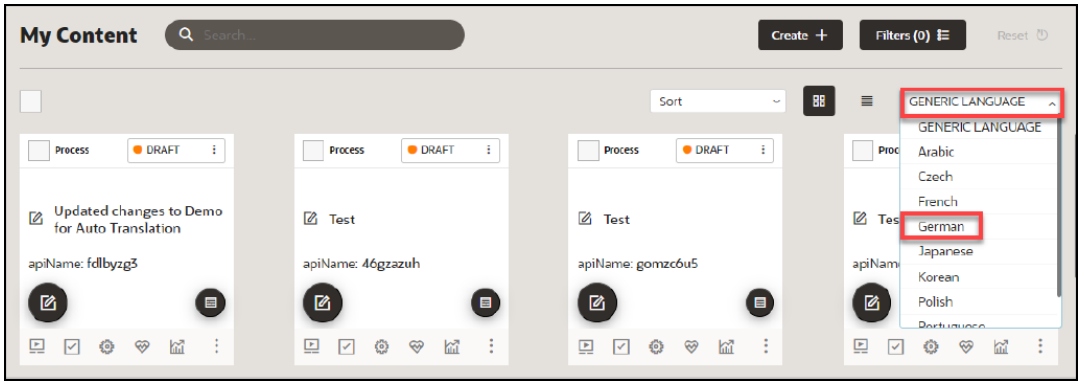
5. Check your email inbox for a message from Oracle Guided Learning <noreply_ogl@comm-apps.ou.ocs.oraclecloud.com>. The message should look like this:



6. Open the attached Excel spreadsheet to view the translation status of all selected guides.

	A	B	C	D
1	**Guide Name**	**Guide Id**	**German**	
2	Test	46gzazuh	Success	
3	Test	gomzc6u5	Success	
4	Test Sim 2	dr8qiy4m	Success	
5	Updated changes to Demo for Auto Translation	fdlbyzg3	Success	
6				
7				

7. The translated guides will now appear in their respective language folders in the **My Content** page. To toggle between each language folder, select the language dropdown menu.



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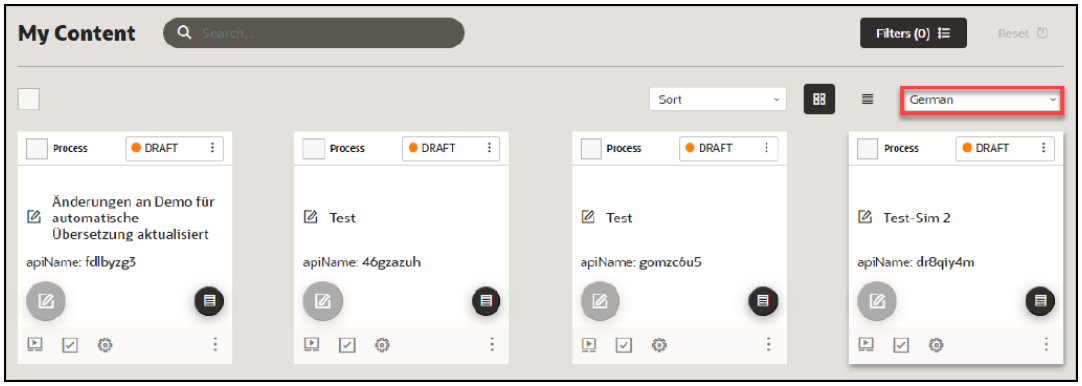


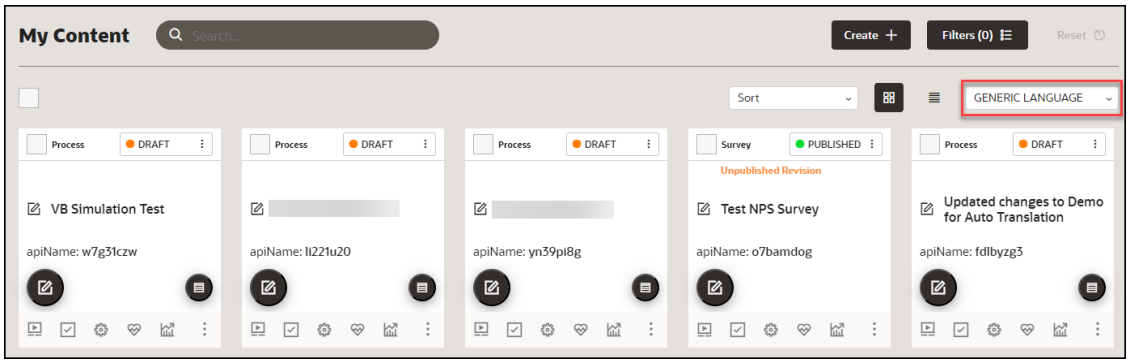
Multi-Language Functionality

Overview of Multi-Language Functionality

The Multi-Language functionality allows you to create copies of an OGL item (i.e., guide, smart tip, etc.) into additional languages (i.e., An English worded OGL item can be made available in Dutch, French, etc.).

> **Note**
>
> Kindly note that this feature does not have an automatic translation capability for the guides.

The screenshot of the OGL console below highlights the default language or the currently selected language if there are multiple options available in the account.



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Important

The Multi-Language functionality:

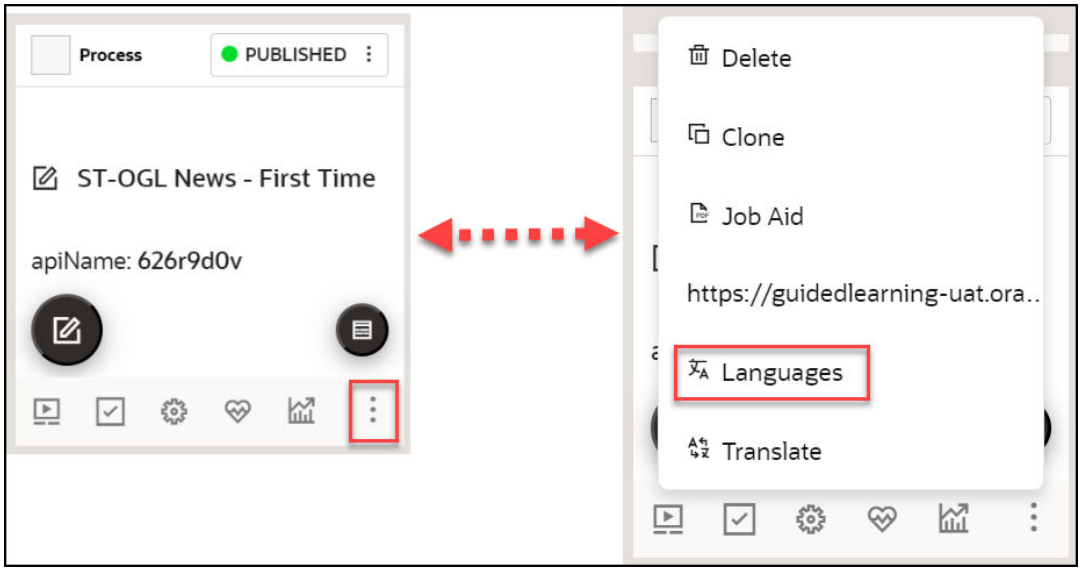
- Does not apply to Training Content (Use the properties file to translate these item types. Refer to OGL Console Left Panel - Translation.
- Allows use of the **Content Editor** in the alternate language folder to perform quick manual translations without having to wait on/purchase a translation service.
- Updates (OGL item structure & settings) are inherited. You only need to update the text in alternate language OGL item(s).
- Allows you to have different languages for different OGL items (i.e., OGL Item A can have languages EN(default), FR, DE, and OGL Item B can have languages EN(default), ES, NL).

Default Language Setting

Previously Oracle Guided Learning's default language for guides was English. From OGL release 21A, we have the facility to set the default language to any Fusion-OGL-supported language.

Accessing and Using the Multi-Language Functionality

1. On the OGL console, go to **Contents**.
2. On the target guide, select the **ellipsis icon** (⋮) and then **Languages** (文A).



The **Languages** modal window is displayed now.

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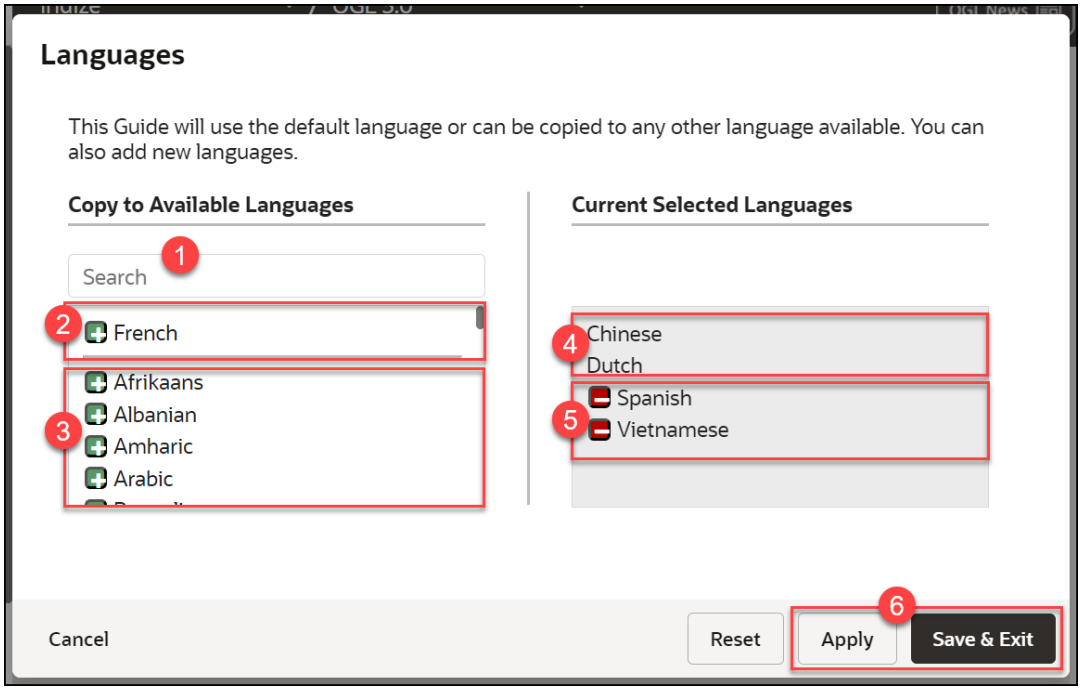

1 Language Search Field

Use this field to search for a target language. Search results are filtered dynamically.

2 Existing Languages in the Account/AppID

Languages currently available in the account/appID are displayed in this section (at the top). A horizontal line acts as a divider between 2 and 3.

3 OGL Supported Languages

This section lists the OGL supported languages. You can select a language by clicking the green button (). The selected language will be listed in the Current Selected Languages section (5).

NOT_SUPPORTED

Although there might be an extensive number of languages listed in OGL, for Fusion only the languages listed below are supported.

- Arabic
- Chinese (Simplified)
- Chinese (Traditional)
- Czech
- Danish
- Dutch
- English

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- Estonian
- Finnish
- French
- French (Canadian)
- German
- Greek
- Hebrew
- Hungarian
- Italian
- Japanese
- Korean
- Latvian
- Lithuanian
- Norwegian
- Polish
- Portuguese (Brazilian)
- Portuguese (European)
- Romanian
- Russian
- Slovak
- Spanish
- Swedish
- Turkish

4 Current Selected Languages - Previously Created

When an OGL item has an existing copy in alternate languages (i.e English) the languages are listed first as read-only.

5 Current Selected Languages - To be added

Current language selections are listed below the existing languages for the OGL item. To remove a language from the current selection, click the red button ( ).

6 Apply and Save and Exit buttons

Once you have made your selections, click on Apply, then Save & Exit to create alternate language copies of the OGL item.

3. Choose the language(s) to which the guide needs to be translated. You can select multiple guides at once.

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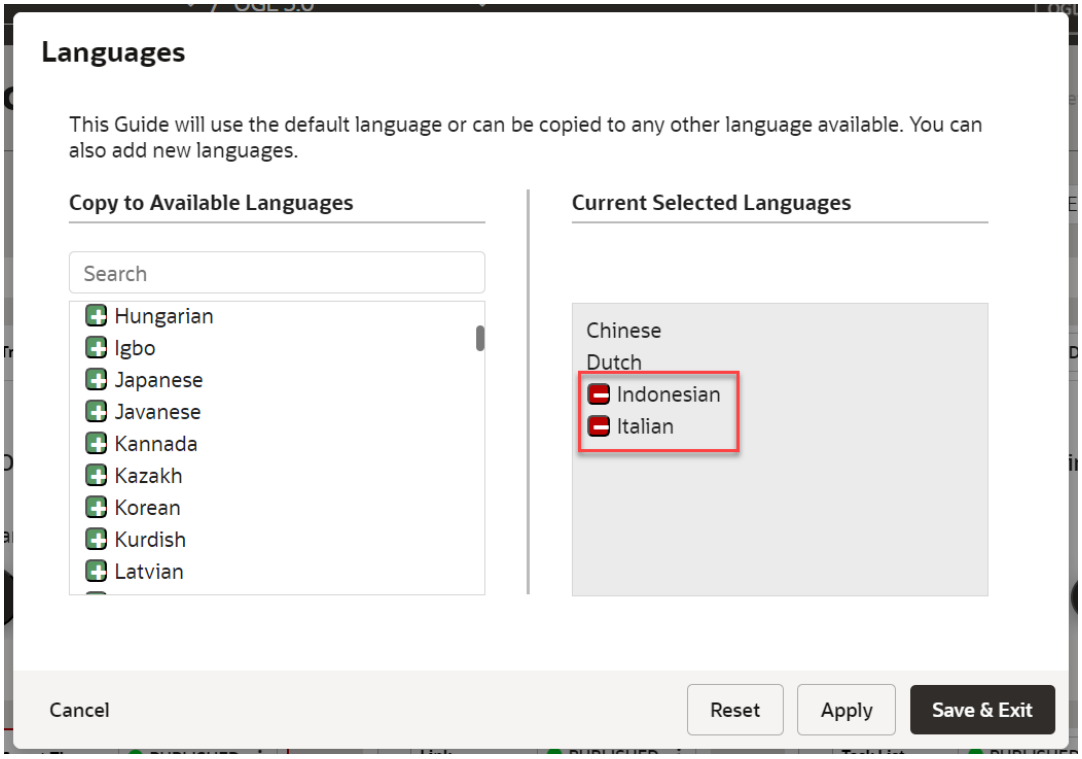
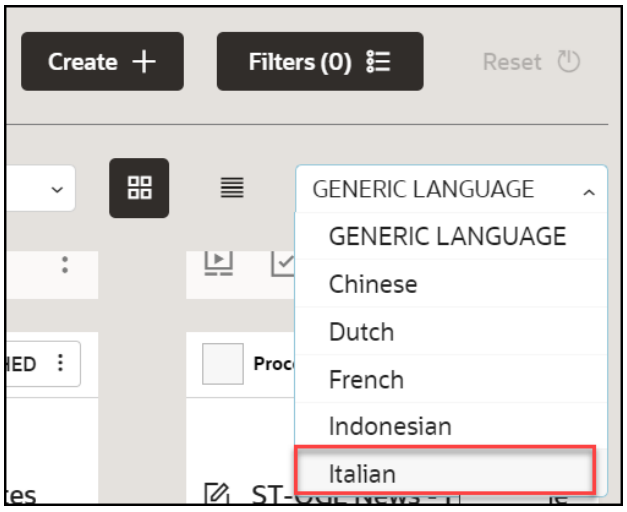


4. Select **Save & Exit**.
   The guide is now cloned.

5. Navigate to the specific language folder to which you have translated the guide.



The guide is now cloned with same API ID.

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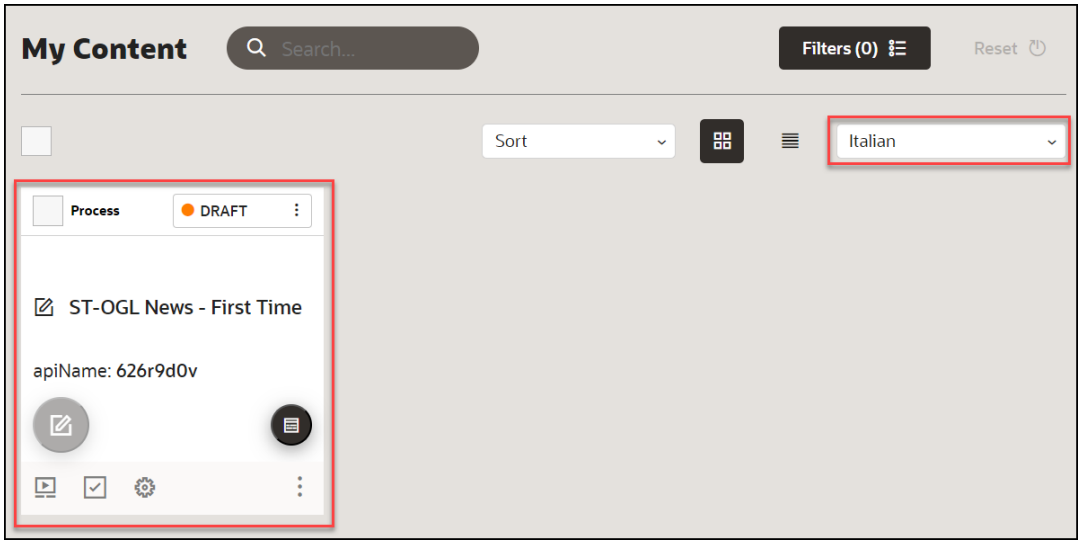

> **Note**
>
> Kindly note that this feature does not have an automatic translation capability for the guides. Once you have cloned the guide, it will remain in the generic language, and you will need to manually translate the guide or use an external translation service/purchase a translation service. Another option would be to manually translate the guide through a third-party translator such as Google Translate for a quick translation.

6. Select here to learn how to translate the guide using an **external translation service**.
or

   Contact your OGL Account Manager to purchase a translation service.

7. Alternatively, use a third-party translator such as Google Translate for a quick translation.
   a. Open the content editor of the guide that you want to translate.

   b. In a new browser tab, go to Google Translate.

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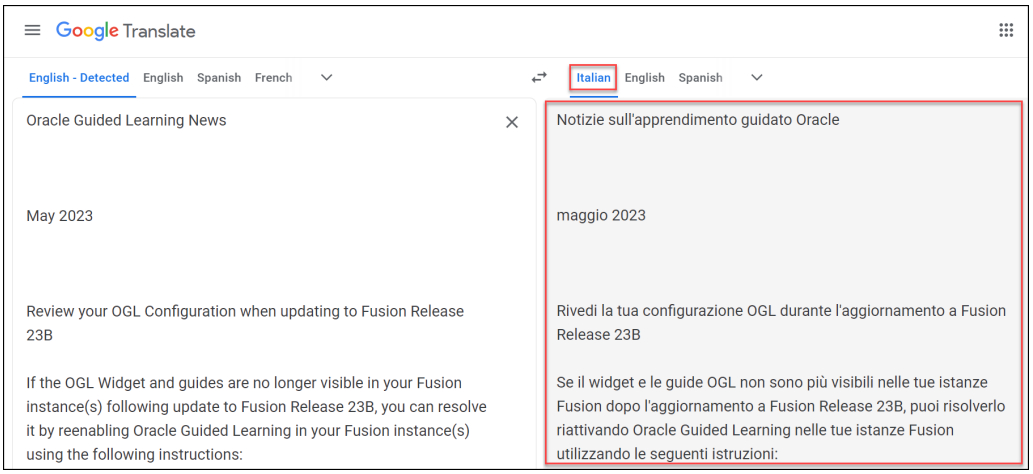
c. Copy the contents from the content editor and paste it into the Google Translator's input column.

d. Select the desired output language, and the content is instantly translated.



e. Copy the translated content from Google Translate and paste it back into the content editor of the guide.

f. Select **Apply** and then **Save & Exit** to save the changes.
Now the content is manually translated. You can also update the guide title manually to the desired language.

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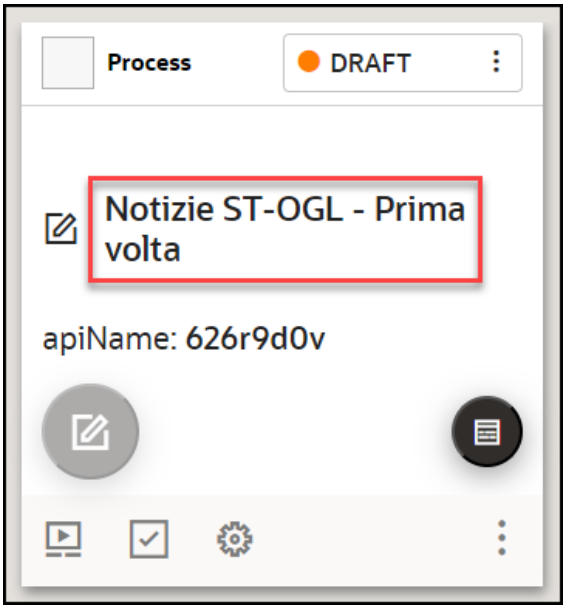

Warning

Deleting an OGL item from the alternate language folder will delete all copies of the OGL item. You can restore the OGL item by recovering it from the Archive folder.

Understanding the relationship between the default OGL item and its alternate language copies

The OGL items in the default language are the primary data files where critical information relating to the OGL items is stored. An OGL item in an alternate language cannot exist without an OGL item in the default language.

Legend:

✅ = **Independent**

⚠ = **Inherits settings/value from the Default Language OGL item**

Information Stored	Default Language OGL item (i.e. English)	Alternate Language 1 OGL item (i.e. Dutch)	Alternate Language 2 OGL item (i.e. French)
Display Settings, Activation Settings, and Advanced Settings (incl. Selectors)	✅	⚠	⚠
OGL item Name	✅	✅	✅
OGL item Step Text	✅	✅	✅
Number of Steps	✅	⚠	⚠
Step Sequence	✅	⚠	⚠
OGL item Status	✅	✅	✅

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Information Stored	Default Language OGL item (i.e. English)	Alternate Language 1 OGL item (i.e. Dutch)	Alternate Language 2 OGL item (i.e. French)
apiName	✓	⚠	⚠
OGL item Property: **Products**	✓	⚠	⚠
OGL item Property: **Modules**	✓	⚠	⚠
OGL item Property: **Sticky Guide**	✓	✓	✓
OGL item Property: **Managed Guide**	✓	⚠	⚠
OGL item Property: **Labels**	✓	⚠	⚠
OGL item Property: **OGL item Type**	✓	⚠	⚠
OGL item Property: **Descriptions (Keywords)**	✓	✓	✓
OGL item Activation Conditions: **Role**	✓	⚠	⚠
OGL item Activation Conditions: **Time**	✓	✓	✓
OGL item Activation Conditions: **URL (incl. Autosegmentation)**	✓	⚠	⚠
OGL item Activation Conditions: **All other (assuming the condition can be localized)**	✓	✓	✓
Editing Steps in the Default Language for Multilingual OGL item: **Adding a step**	✓	⚠1	⚠1
Editing Steps in the Default Language for Multilingual OGL item: **Deleting a step**	✓	⚠2	⚠2
Editing Steps in the Default Language for Multilingual OGL item: **Text change**	✓	✓3	✓3

Note

1. Inherits the default language text(not auto-translated), needs to be updated using **Content Editor** in the relevant alternate language.
2. Deletes the step in all copies of the OGL item.
3. Text changes to existing steps are not auto-translated, needs to be updated **Content Editor**.

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Important

Creating a new OGL item in the default language does not automatically create the alternate language copies of the OGL item.

Manual or External Translation

The following list of languages are supported for manual or external translation.

- Arabic
- Chinese - Simplified
- Chinese - Traditional
- Croatian
- Czech
- Danish
- Dutch
- Finnish
- French - Canada
- French - France
- German
- Greek
- Hebrew
- Hungarian
- Italian
- Japanese
- Korean
- Norwegian
- Polish
- Portuguese - Brazil
- Portuguese - Portugal
- Romanian
- Russian
- Slovak
- Slovenian

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- Spanish - Worldwide
- Swedish
- Thai
- Turkish
- Vietnamese

Translating the Guides Using Machine Translation

To manually translate guides, you will need to first export the OGL properties files of the guides you wish to translate, then use an external translation service or manually translate the guide contents. Once translations are completed, you will need to generate a ZIP file of the translated guides, then import it back to OGL. The Translations function in OGL allows you to manage the exporting/importing of the properties files for manual translation.

> **Note**
>
> - The best practice is to have the content ready and signed off in the Generic Language (English) before submitting the machine translation.
> - Guides will only be tested in the default language. The client is responsible for testing the foreign-translated content (only for Managed Service clients).

This section will guide you on how to translate your guides using machine translation.

To translate:

Step 1: Export the OGL content from the Generic Language folder (English folder).

> **Note**
>
> By default, OGL guides are in English. If you are using an APP ID without translated guides, you will only have a generic folder including all the English guides. As soon as a translation is completed, folders with the translated content in other languages will be created.

1. From the OGL console left navigation pane, select **Settings** > **Translations**.

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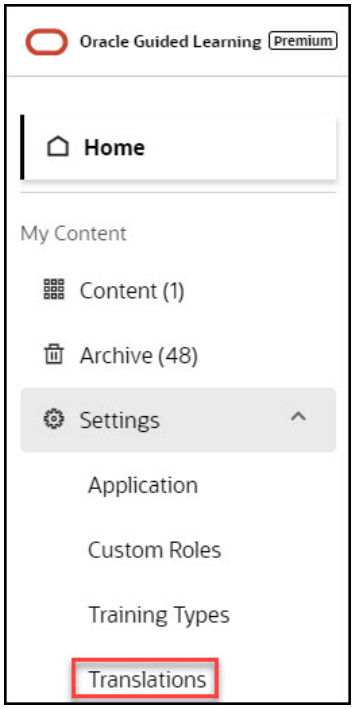
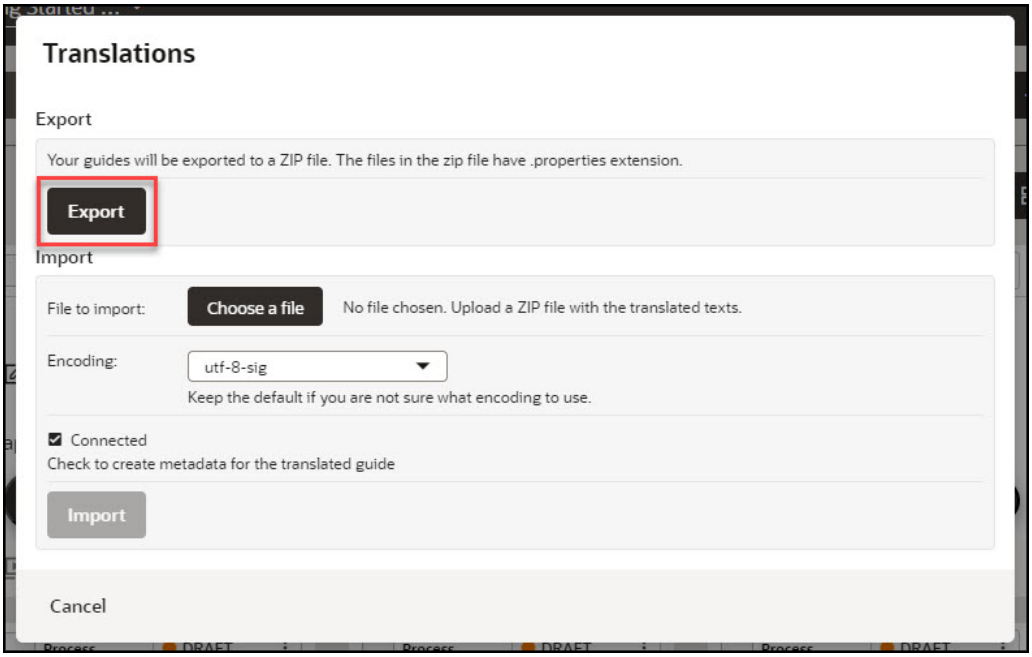


The **Translations** modal is displayed.

a. Select **Export**.



A ZIP file containing your guides is sent to your email address.

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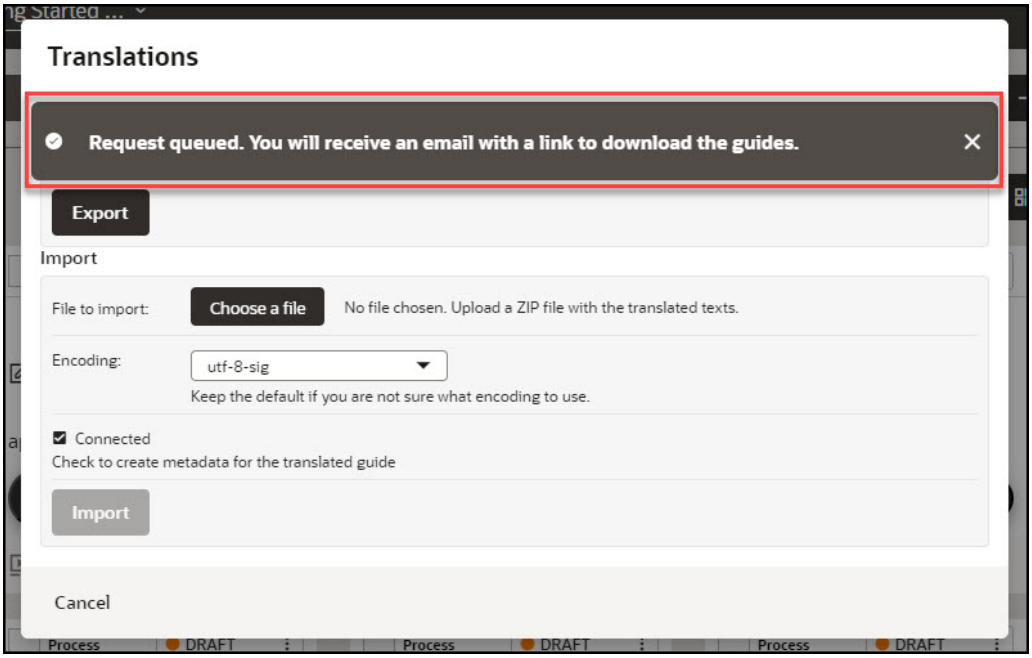
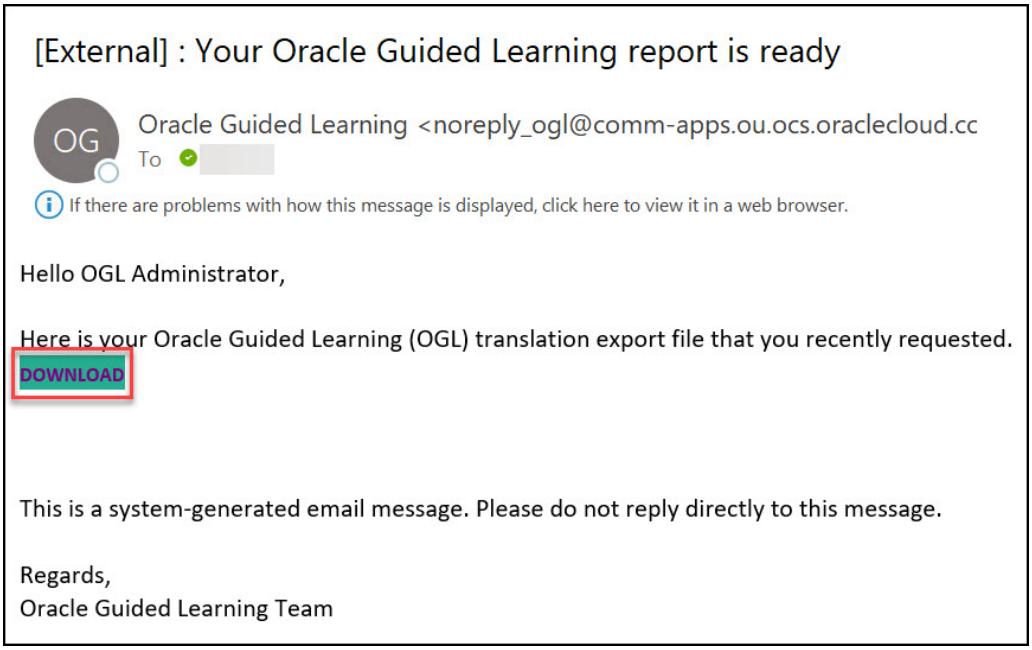


b. Look for the email from Oracle Guided Learning containing the link to your translation export file and select **Download**.



The browser now downloads the ZIP file.

c. Navigate to your **Downloads** folder in the local drive and unzip/extract the downloaded file.

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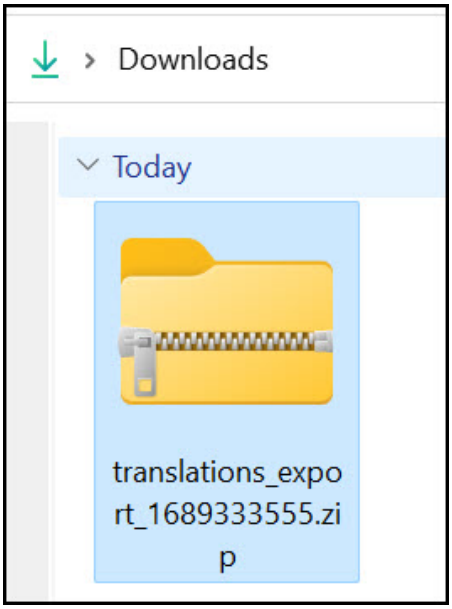
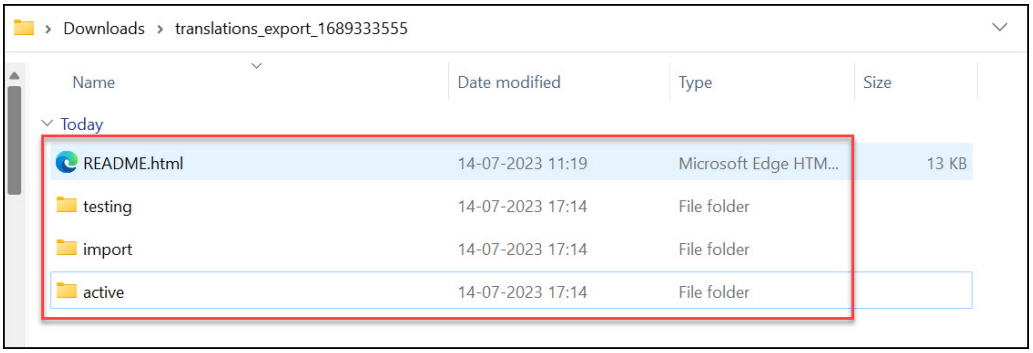


After extracting the folder, you will notice three subfolders named **Active**, **Testing**, and **Import** and a **README.html** file.



Note

Active:

This folder contains the guides with status as published in the OGL dashboard from different languages/ default languages.

Testing:

This folder contains the guides with status as a draft in the OGL dashboard from different languages/ default languages.

Import:

This folder is used to import the translated content to the OGL dashboard in different languages.

Readme:

This is an HTML file that gives insights into export and import.

1. Navigate to the "testing" folder within the extracted folders.

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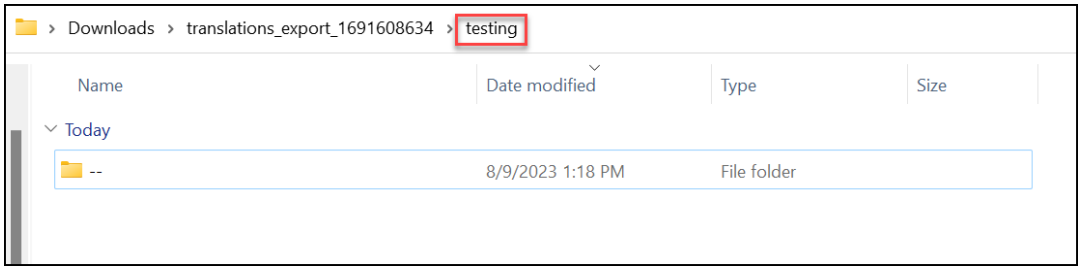
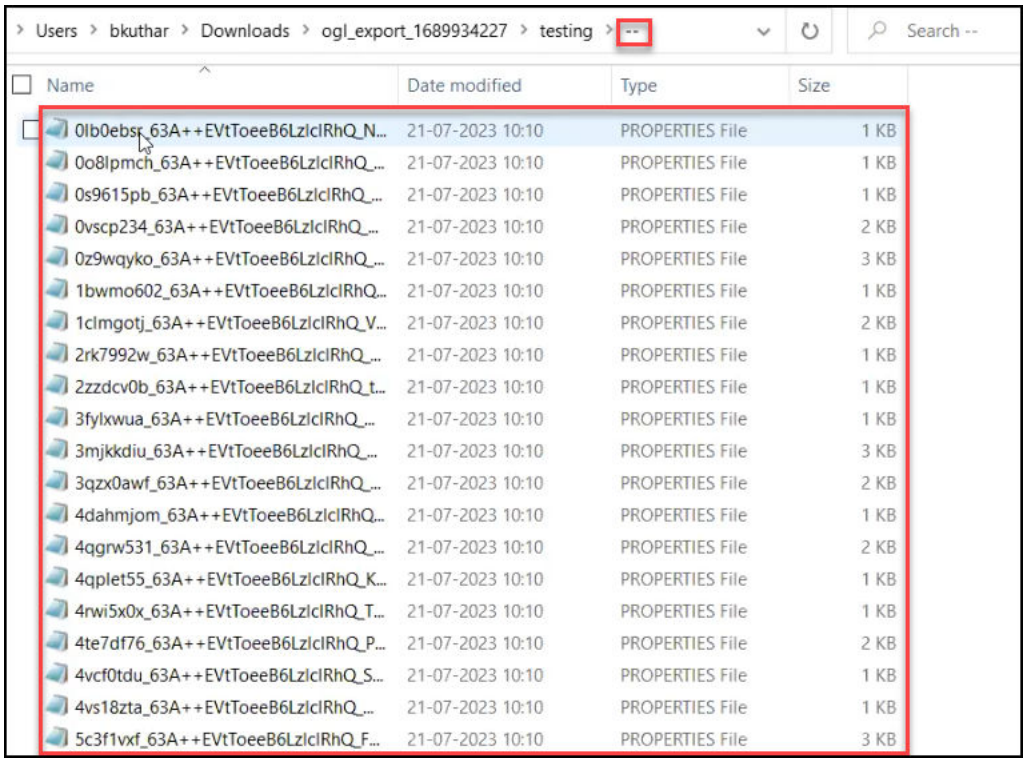


2. Go to the subfolder named "**--**".

> **Note**
>
> "**--**" is the default name for generic folders.

You can see the list of existing guides in the English language, identified by their API IDs.



3. Select the guides you want to translate, copy and paste them to a new folder.

> **Tip**
>
> - Use the API names of the guides to identify the exact guides you want to translate.
> - Consider renaming the new folder to make it easier to identify.

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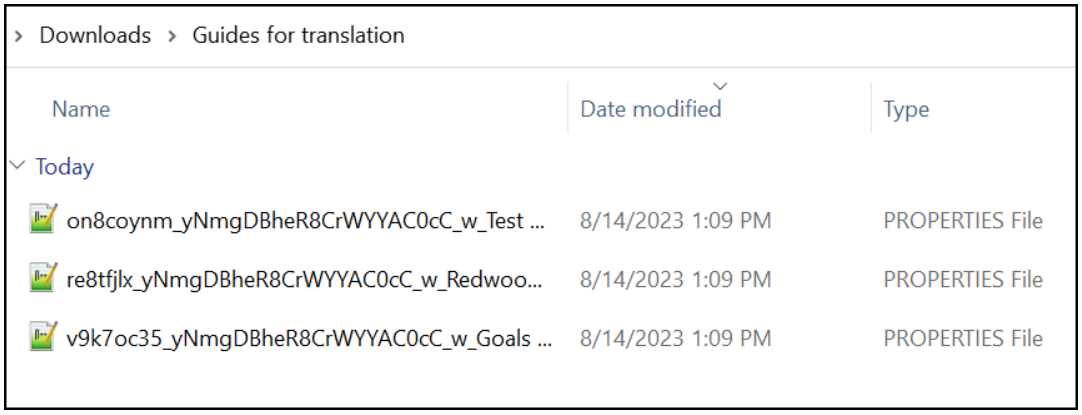
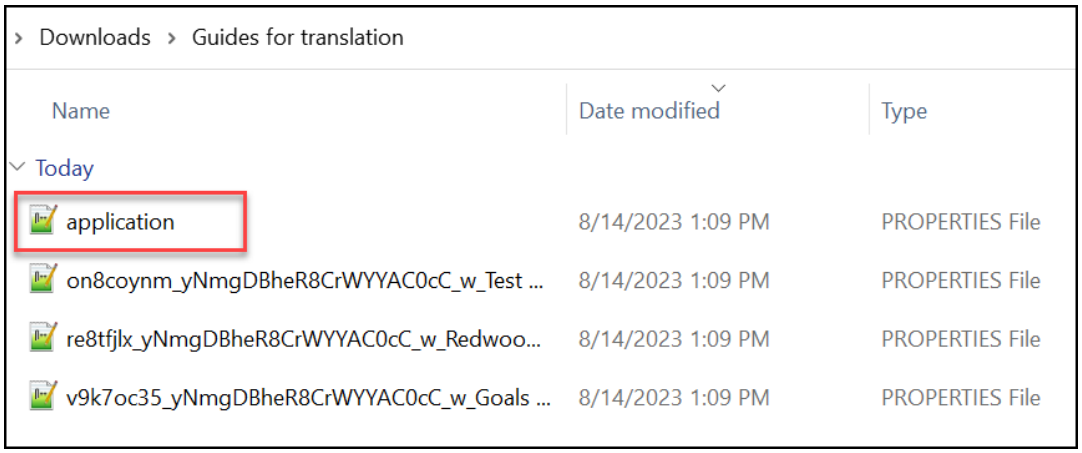
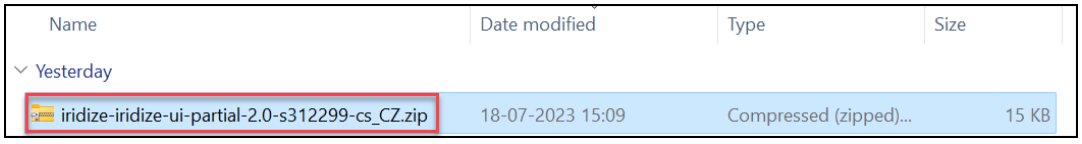


4. Copy and paste the application PROPERTIES File (.properties) from the testing folder to the newly created folder.The application PROPERTIES File contains all the basic setups like **Next**, **Back**, **Done**, **Help,** etc.



Step 2: Import the translated guides to OGL.

1. Open the downloaded machine translated Zip file & keep it ready for copying.
(In the following example, we have retrieved the translated content in Czech.)



2. Navigate to the folder where you first downloaded the ZIP file from the OGL Dashboard.

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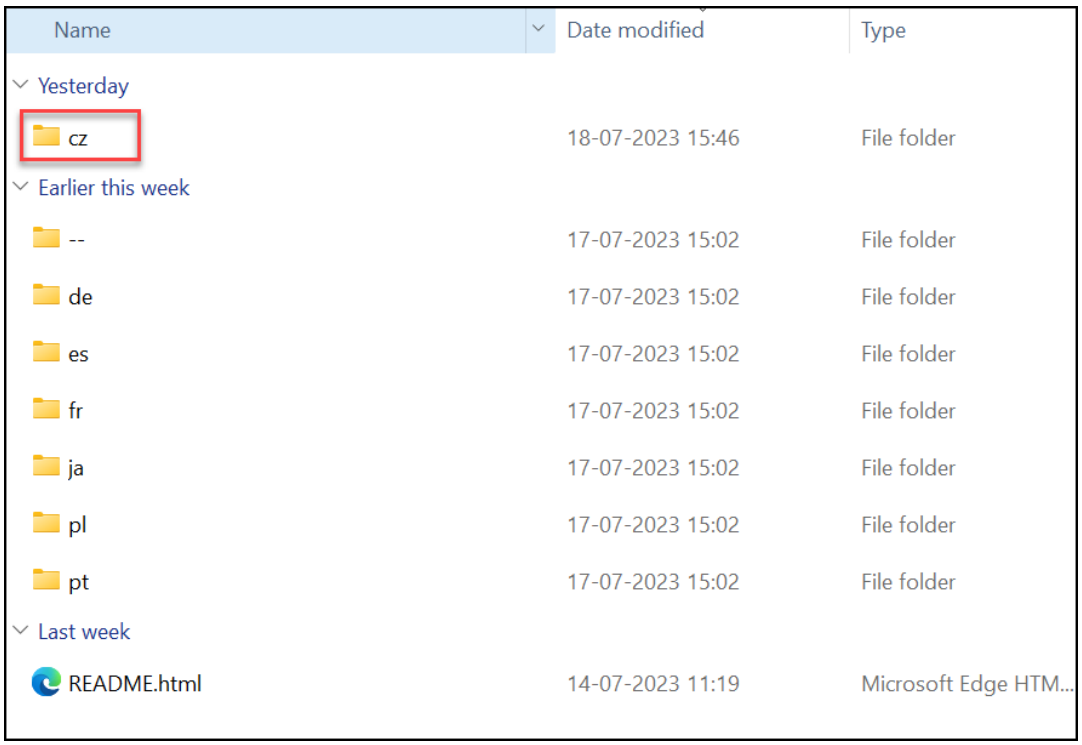
3. Open the **import** folder and create a new folder. Name the folder with the language code for which you translated.

> **Tip**
>
> To import French guides, the folder should be named "fr," while for Czech, it should be named "cz," and so on.



4. Copy and paste the translated content to the specific language folder.

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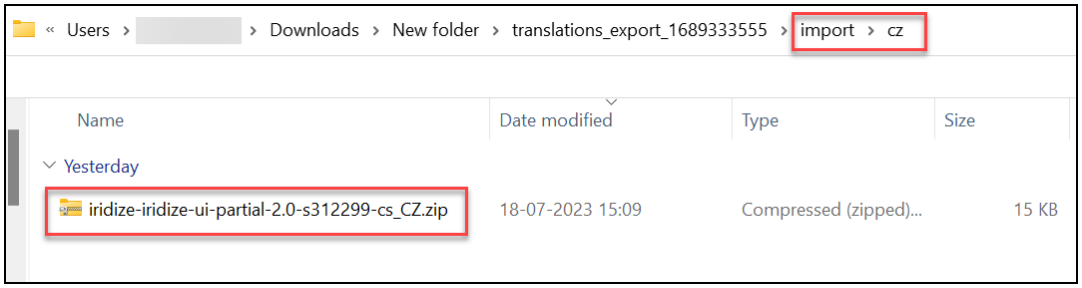
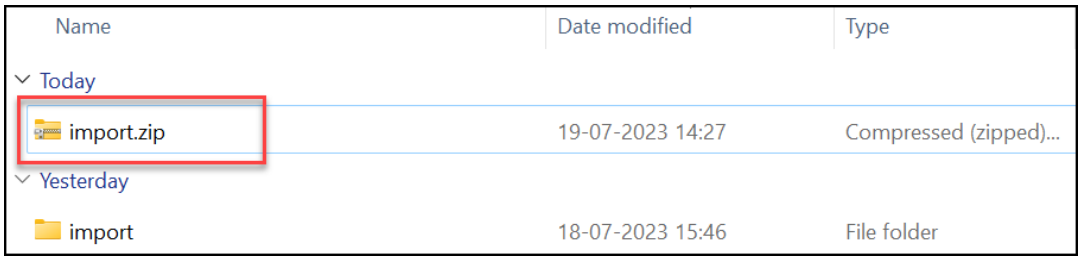
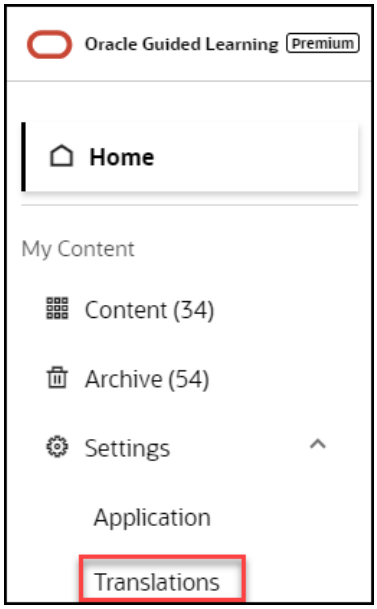


5. Compress/Zip the **import** folder alone.



6. Navigate to the OGL dashboard.
7. Go to **Settings** > **Translations**.



The **Translations** modal window is displayed now.

8. Under the **Import** section, select **Choose a file** andchoose the file named"**import.ZIP**".

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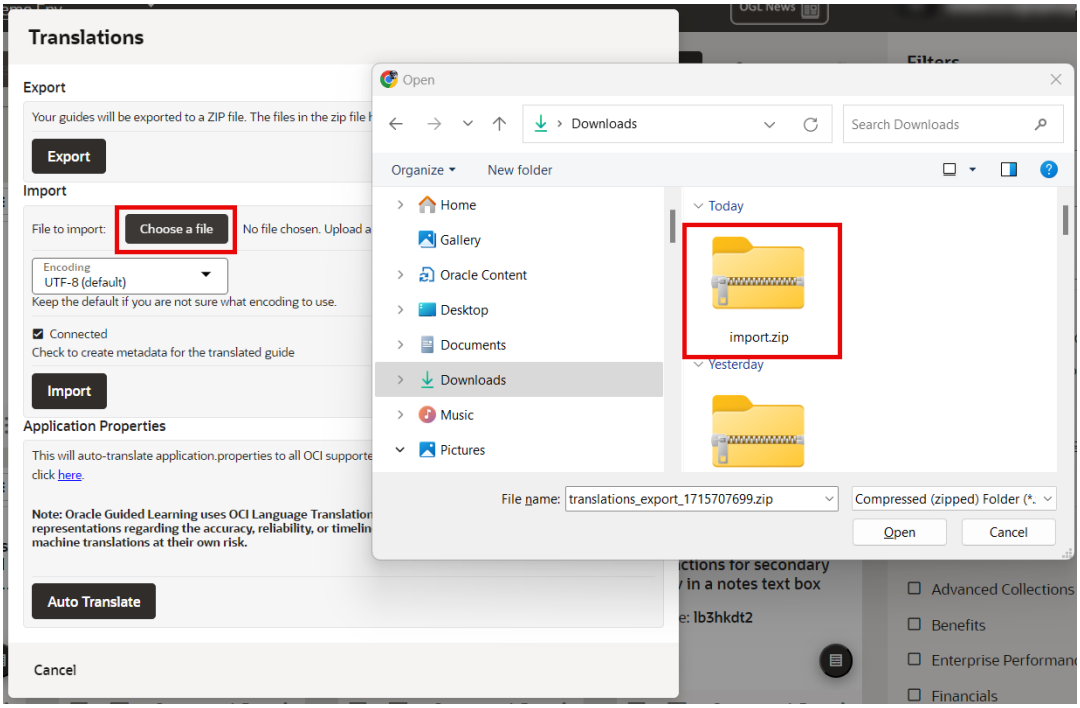
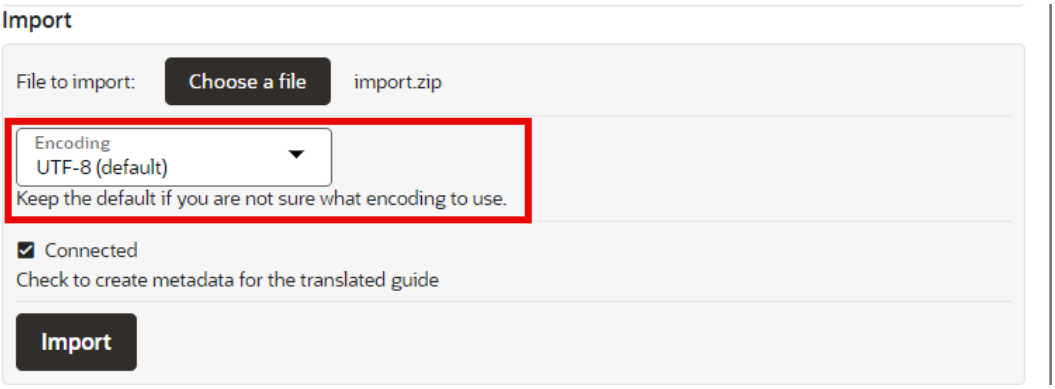


9. Set the encoding to **utf-8-sig**.



10. Check in the **Connected** checkbox.
(If this option is not checked, any additional modification cannot be made in the guide.)

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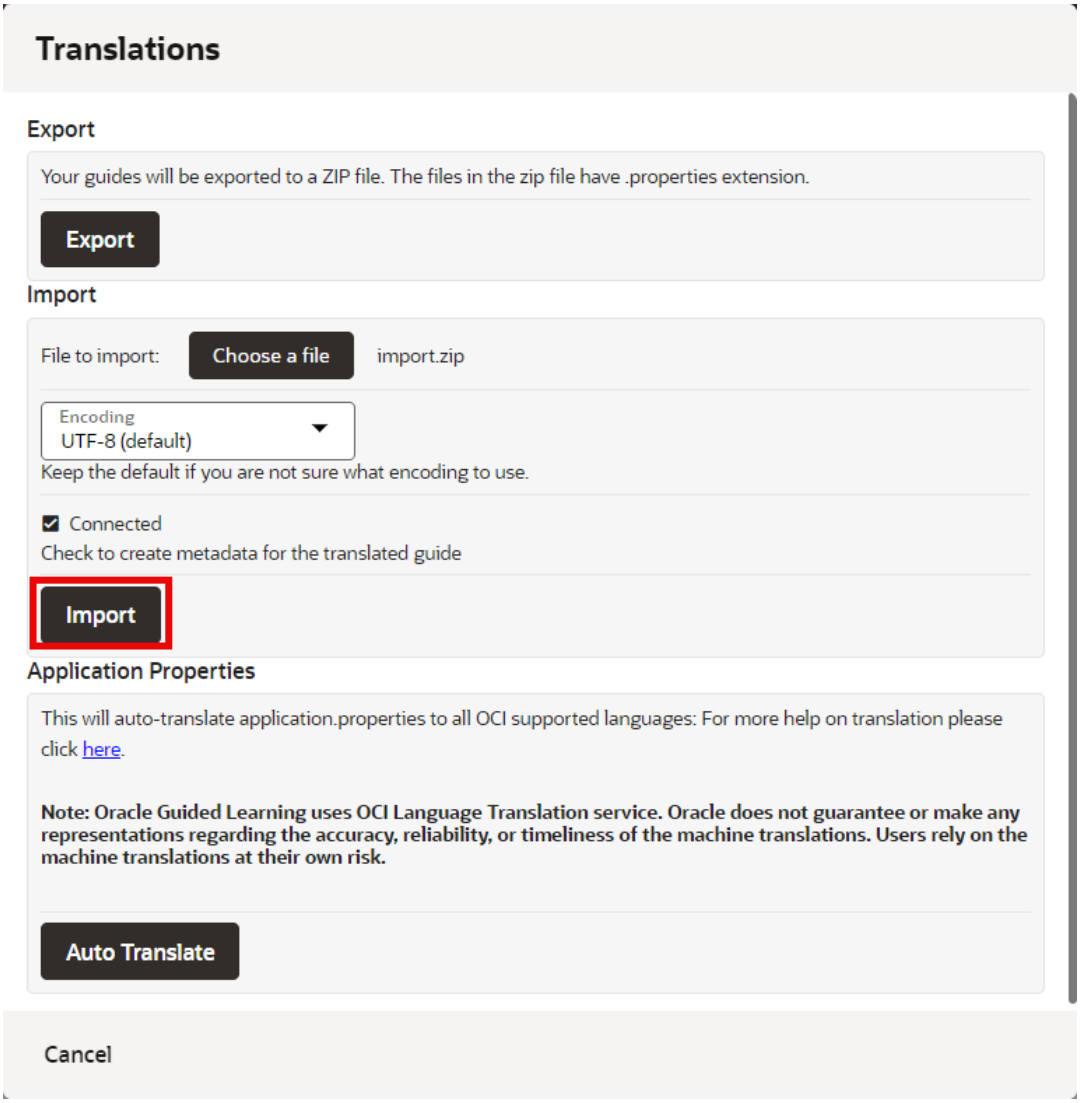

11. Select the **Import** button.

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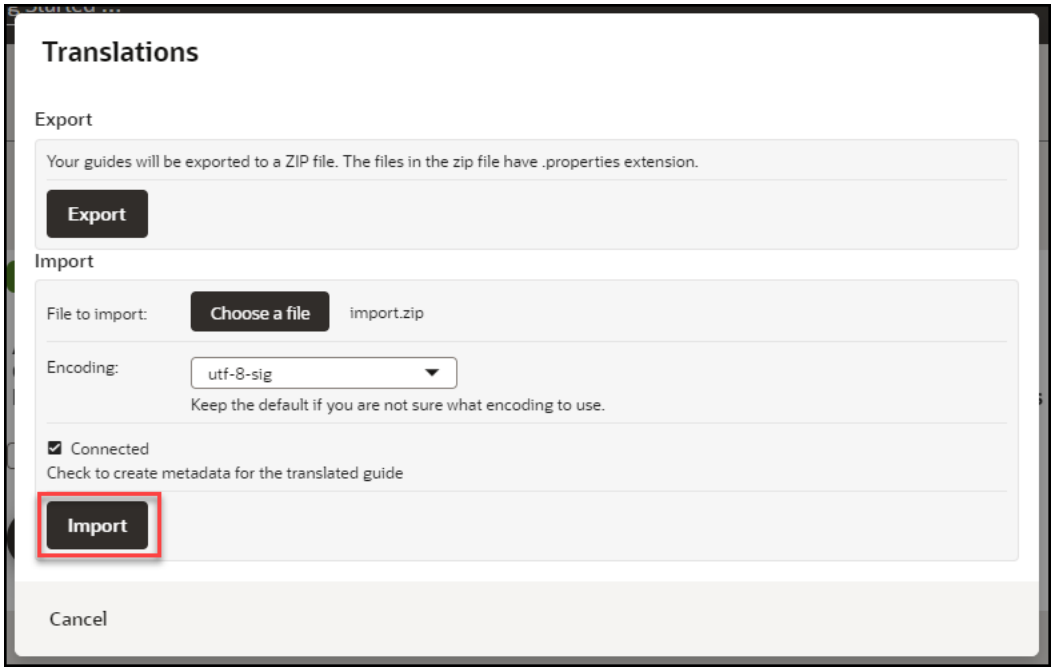
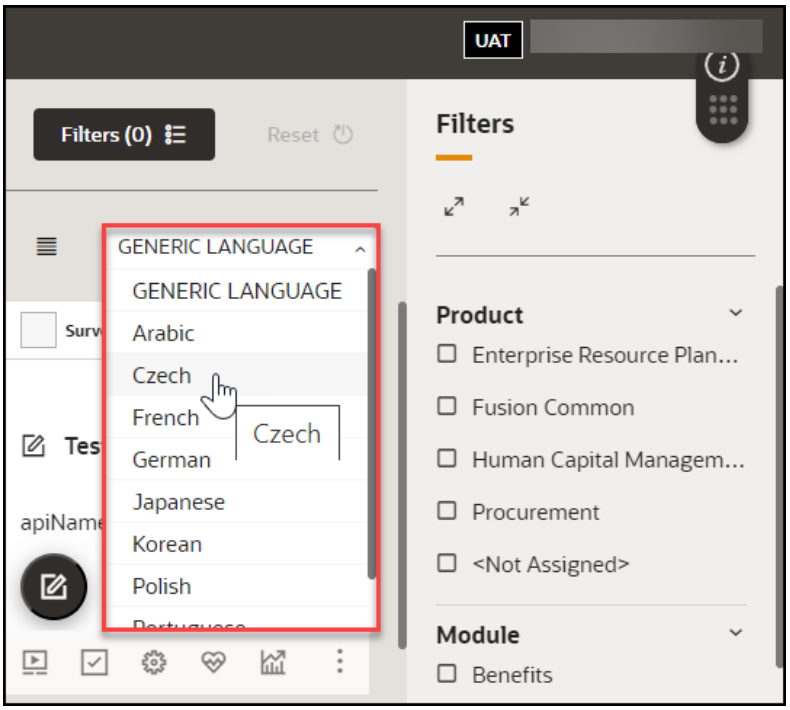


The translated content is now imported.

12. Verify all the translated guides are available in the respective language folders.
    a. On the OGL console, select **Contents**.
    b. Select the **GENERIC LANGUAGE** dropdown and choose the desired language.



The translated guides are now displayed.

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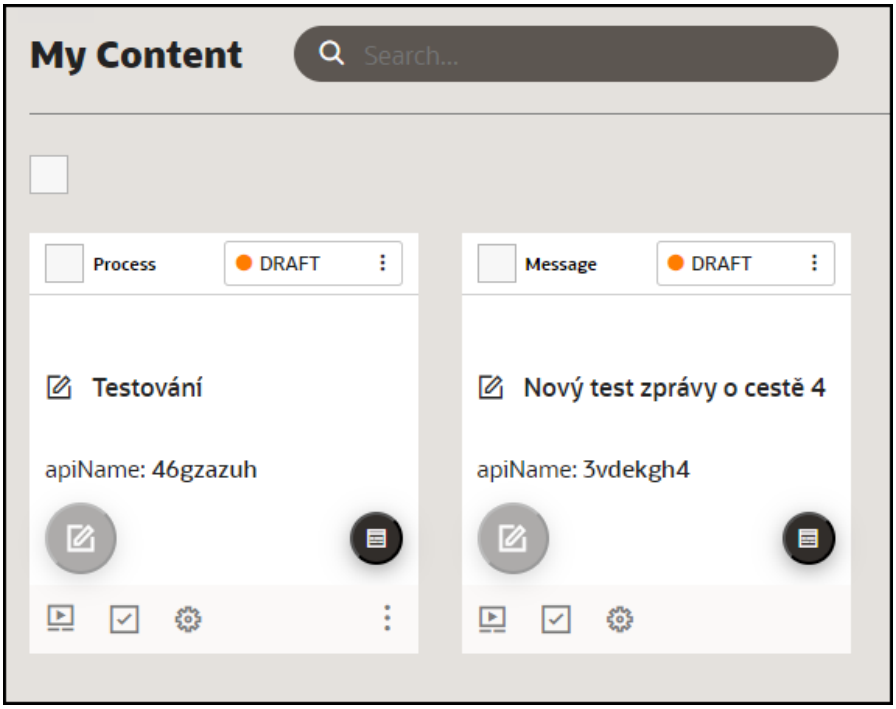

c. Launch any guide in the Fusion Application by changing the language in the Application login screen.
(Normally, the guide will progress similarly to the default language guide. If the translation guide does not progress like the default language guide, follow the steps in the troubleshooting tips.)

Using the Multi Language Widget

A user may choose to select an alternative language available on the OGL widget. Here is an easy way to do this:

1. Open the Guided Learning widget.

2. At the bottom-left of the open widget, click the **Language Selection** icon ( ) then select the desired language from the menu.

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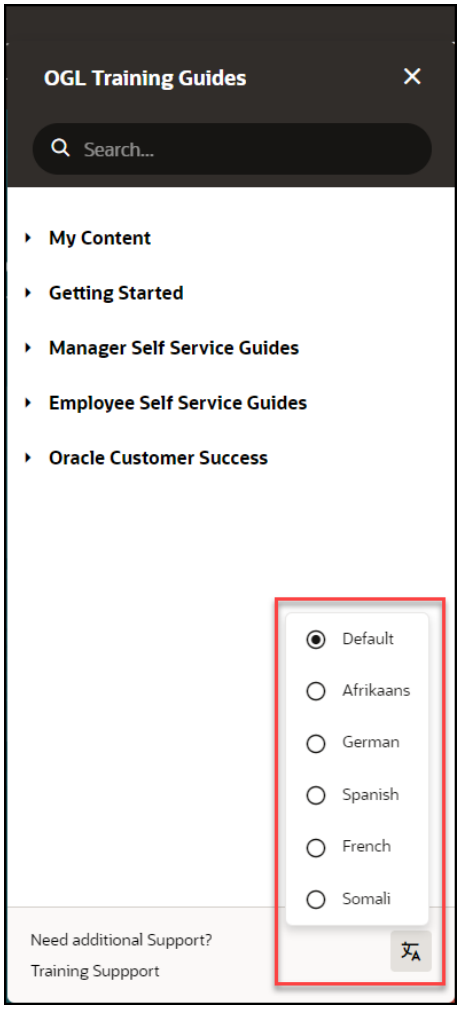

All guides available in the selected language will now display in the widget. For example, if you selected Dutch from the available languages, all Dutch guides will now display in the widget.

Once you sign out of the Fusion application and sign back in, the widget language will default to the language you have previously chosen.

> **Note**
>
> If a user does not manually select a language from the OGL Language Menu, OGL defaults to the Fusion application language for the session.

User Management

Once your OGL account is created, you can add new users with different permission levels. The new users can create, publish, delete guides, edit content, view analytics, etc. We

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recommend you follow the **Least Privilege** principle when granting permissions to new OGL users, especially the permission to publish guides.

You can set up multiple types of users depending on the level of access you want each user to have. Each user is identified by their name, email address, and the permissions assigned to them.

Introduction to OGL Roles

Before you set up users in OGL, you should understand the roles and permissions that you can assign to a user.

> **Note**
>
> The roles discussed below only apply to the OGL Console and are not related to the application roles.

Roles & Permissions

Viewer: Executive sponsors are the common target audience for this role which only requires the ability to see what guides exist and view the Analytics Dashboard.

Permission	Detail
Preview a guide	• Preview Guides
View Analytics	• View Analytics

Editor: The Editor role addresses users who only need to work with the copy/text in the guides and messages to end-users. This allows writers to be able to get into the system and provide content without exposing them to publishing and other mission-critical capabilities.

Permission	Detail
Access Content Editor	• Edit OGL item text via Content Editor
Manage Messages	• Create, Update, Clone, and Delete Messages

Developer: This role enables admins who should be working with the detailed features within individual guides, while not opening up system-wide settings that would affect all Editors and Developers.

Permission	Detail
Edit Guides	• Update OGL item name(s) • View Guide in Full Editor • Edit Guide, Video, Links, Tasks Lists via Full Editor • Edit Settings for Guide, Video, Links, Tasks Lists in Dashboard • Edit Activation Settings for Guide, Video, Links, Tasks Lists in Dashboard
Create Guides	• Create/clone OGL item(s)
Delete Guides	• Delete/recover OGL item(s)
Publish Guides	• Activate/inactivate OGL item(s) • Publish/unpublish OGL item(s) • Publish unpublished revisions of OGL item(s)

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Permission	Detail
Edit Managed Guides	• Edit OGL items classified as managed by Oracle

Owner: Within each organization, there should only be 2-3 people with this level of access. The permissions included in this role enable the admin to make changes to the system that will affect every user and guide therein.

Permission	Detail
Manage Users	• Add/delete users from the appID • Assign/revoke user permissions
Manage Help Widget Settings	• Update the help widget sort order • Update the OGL Widget settings for development and production
Manage Display Groups	• Create, update, and delete display group(s)
Manage Roles	• Create, update, and delete simplified role(s)
Manage Pages	• Create, update, and delete OGL pages for use in conditioning content in the library
Manage Products & Modules	• Create, update, and delete OGL Products and Modules which are used in OGL analytics and as content filters
Manage Training Types	• Create, update, and delete training type(s)
Manage Themes	• Can update the theme to any of the available themes in the OGL Console. • Can download the available Design Kit(s) in the appID • Can update the theme via the appID's Design Kit • Can upload modified Design Kit(s) to the appID
Change application settings	• Enable feedback • Manage feedback settings for development and production • Update the application(sub-account) name
Create Managed Guides	• Set a guide as a managed guide
Manage Comments	• Manage comments in the full editor
Reset end-user usage data	• Reset user analytics data
Manage Cloud Configuration	• Manage Cloud Configuration in the OGL Console
Manage Oracle Content	• Manage **Oracle Content** in the OGL Console.
Batch Update Guides	• This feature enables you to update guides in batches.

Assigning Roles and Permissions

You can assign all of the permissions within a role to a user, or assign specific permissions. Depending on your approach, the role icons will change so you can quickly see which roles and permissions a user has:

= ALL of the permissions within the OGL role are assigned to the user.

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= **SOME** of the permissions within the OGL role are assigned to the user.

= **NONE** of the permissions within the OGL role are assigned to the user.

- To revoke all user permissions for a particular OGL role simply click on or to make it
- To assign all user permissions for a particular OGL role simply click on to make it
- To assign some user permissions for a particular OGL role simply click on Details, then proceed to assign/revoke the required permissions

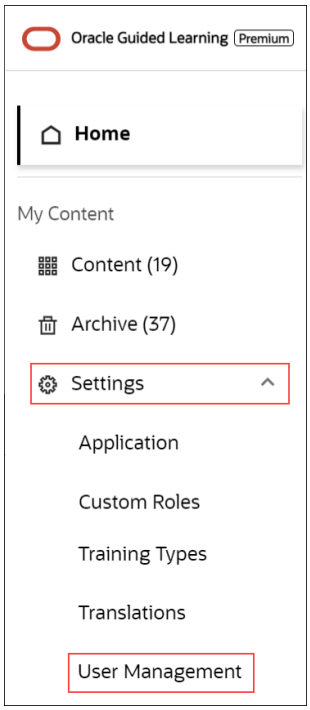
Adding Users

> **Note**
>
> Only the identified client-side OGL Admins have the access to add additional users to the account.

Use the user's email address to add them to the OGL.

To add users:

1. On your OGL console's navigation menu, select **Settings** > **User Management**.



   The **User Management** modal window appears.
2. Select the **Add Users** button.

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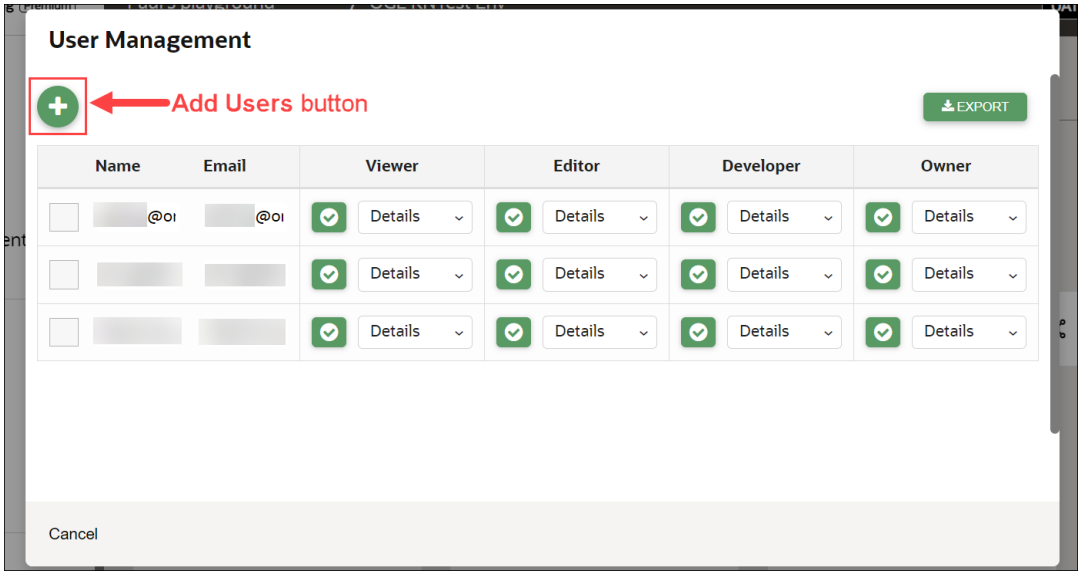
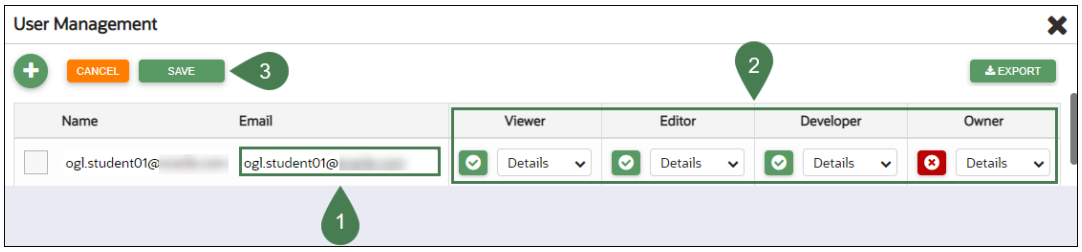


3. 1 Enter the new user's email address in the **Email** field, 2 assign the **user permissions**, then 3 select **Save.**.



> **Note**
>
> See the above *"**Assigning Roles and Permissions**"* section to learn more.

4. Select **Close (X)** to exit the **User Management** modal window.

Removing Users

To remove Users:

1. Navigate to the **User Management** modal window.
2. Check in the checkbox at the beginning of the line that lists the user you want to remove. Once checked in, the **Delete** button appears.

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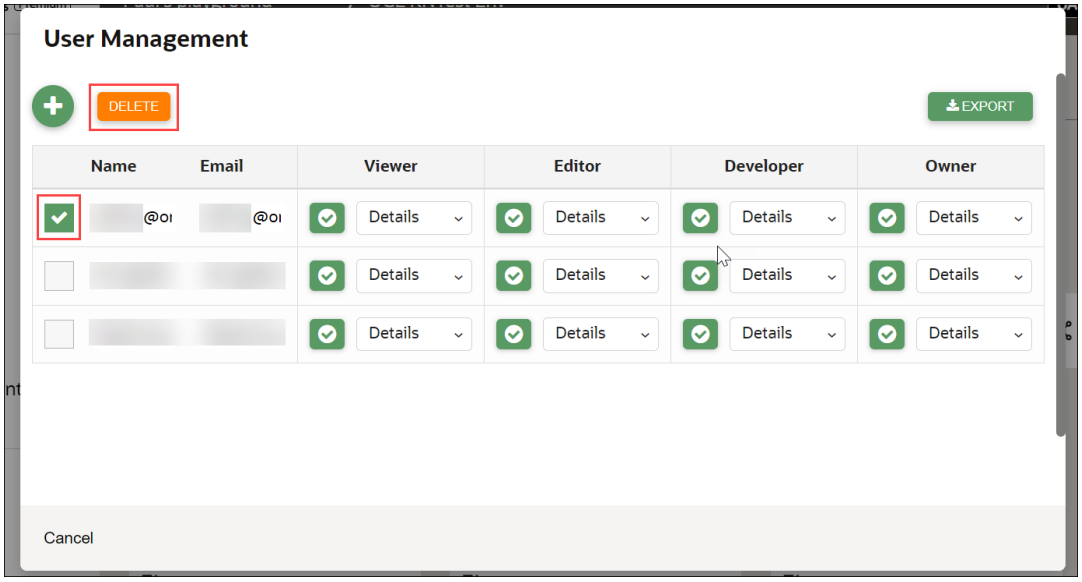
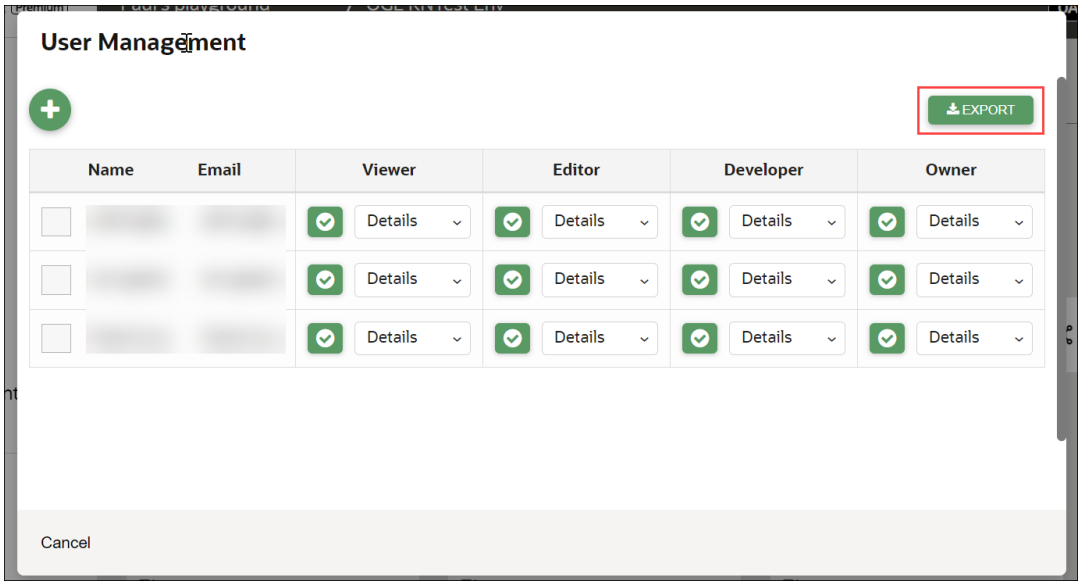


3. Select the **Delete** button.
   The user is now removed from OGL.

Exporting the OGL User Matrix

You can export the OGL user matrix in "***.xlsx***" format with a single click/selection.

1. Navigate to the **User Management** modal window.
2. Select the **Export** button (EXPORT) to download the user matrix.



The browser now downloads the ***.xlsx*** file.

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6

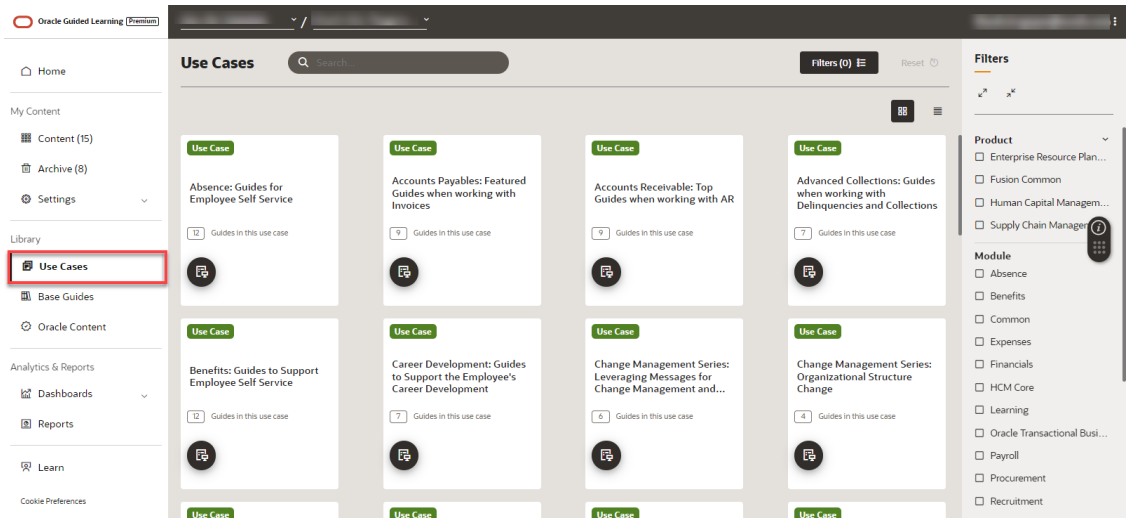
Library

OGL offers libraries of pre-built OGL content that align with Oracle Cloud Fusion applications. The content from these libraries were developed by Oracle expert teams and employ Oracle's best practices to provide content developers efficient access to updated and relevant OGL content to help accelerate your content development experience. The Library section in the left navigation panel is where you can browse and access these various content libraries and leverage Oracle's experience and expertise.

Use Cases

The Use Cases library provides access to procured collections of OGL guide packages that address specific business use cases and scenarios with Oracle Fusion products. Use Cases allow developers to access pre-built Fusion base guides without the intervention of an Oracle Account Manager and with the added benefit of seeing how different base guides can work together to achieve specific results.

To access the Use Cases library, select **Use Cases** in the left navigation panel.



Display Use Cases

Depending upon which Oracle Fusion products you may be using, the Use Cases library will present an assortment of pre-built guide packages based on which Fusion products you have selected in your Application settings. Follow the steps below to specify which Fusion products you wish to display in the Use Cases library.

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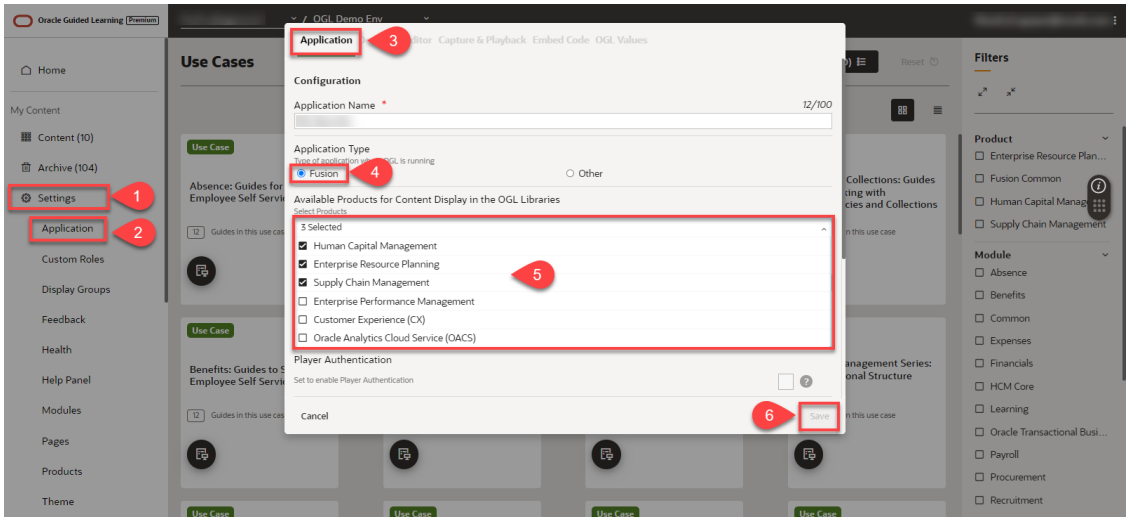

1. In the left navigation panel, select **Settings**.
2. Select **Application**.
3. In the Application Settings modal, select the **Application** tab.
4. In the **Application Type**, select **Fusion**.
5. Under the **Available Products for Content Display in the OGL Libraries** section, select the dropdown menu and select any products from the list that you wish to display in the OGL Libraries.
6. Select **Save** when finished.

The Use Cases library will now display all use cases associated with the Fusion products you selected.

Base Guides

OGL users have access to a vast library of starter content assets supporting Oracle cloud products called Base Guides. The base guide content is built from the experience of thousands of hours of cloud application implementations, and is intended to provide users with clear, step-by-step instructions for essential tasks.

Select Base Guides in the left navigation panel to view the items within this library.

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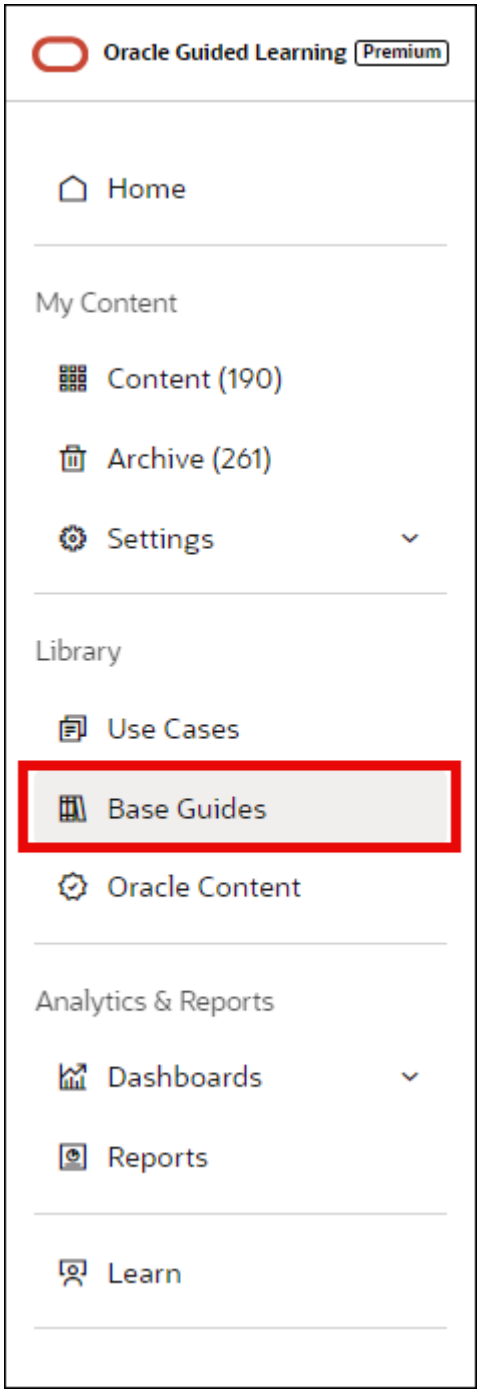

Applying Filters

The Base Guides library will display pre-built content items that are ready for you to import into your My Content library. You can use the Product filters in the Filters panel to narrow the list of content items displayed based on specific application products.

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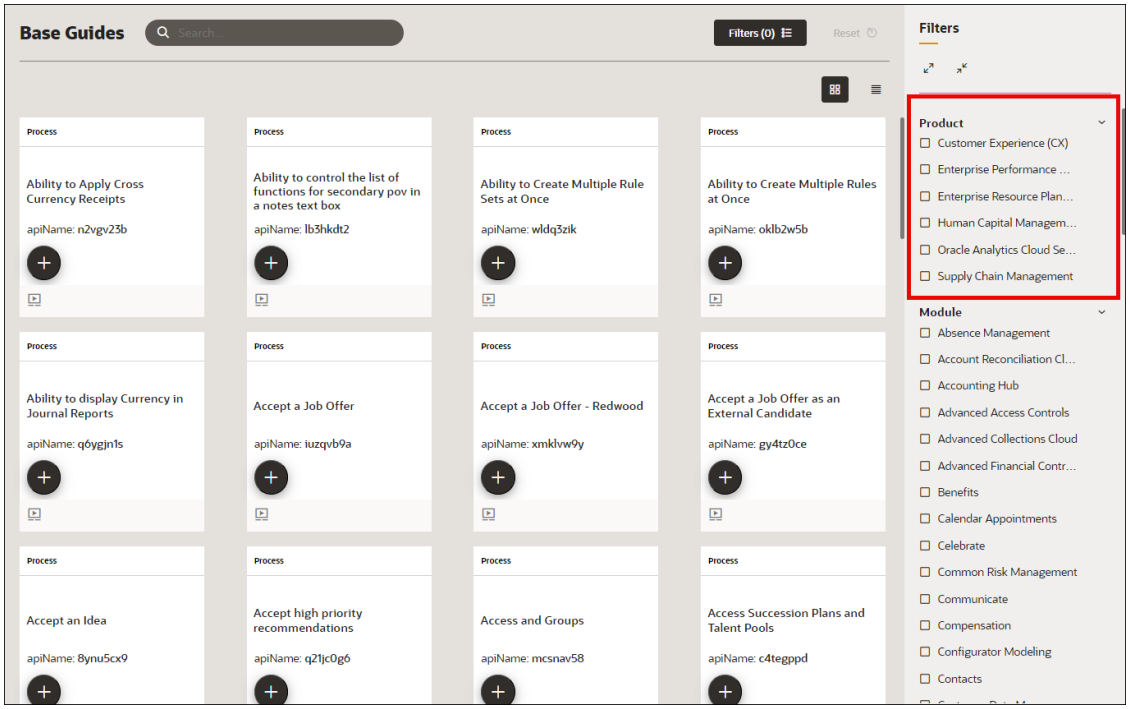
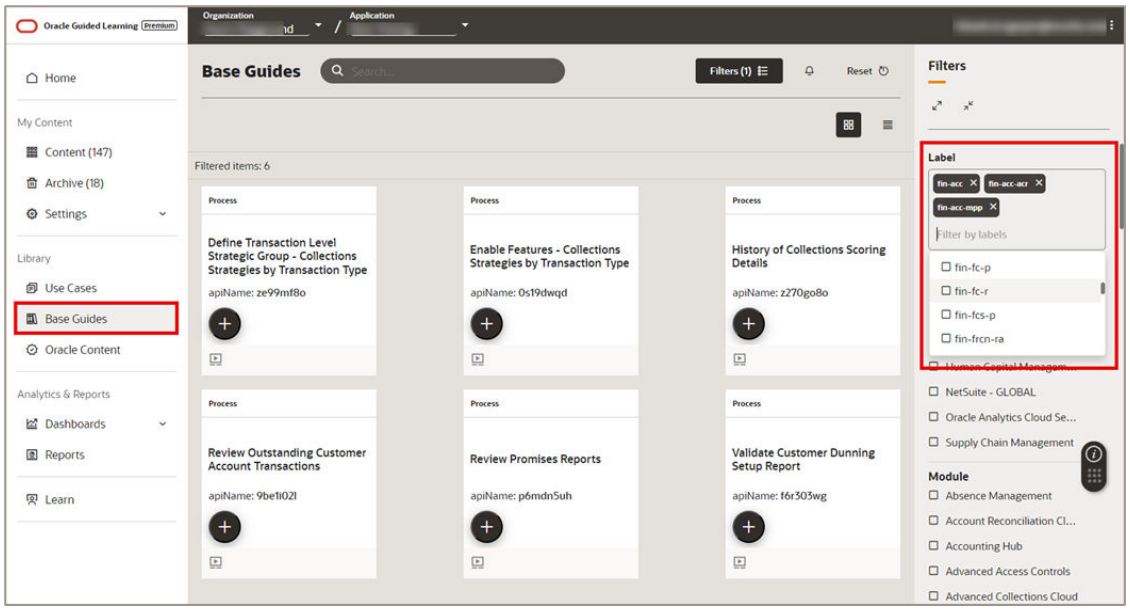


You can also filter the content items displayed by using pre-defined labels found in the Labels section of the Filters panel. There you will find pre-existing labels for various Fusion products and modules from which you can select to narrow content items for more efficient browsing. Additionally, HotSpot and Launcher guide types are now supported in the Base Guide library and can be imported into these libraries. These guide types are also available as filters in the Filters panel for both libraries.



Base Guides are available for various Oracle Fusion applications, such as HCM, ERP, SCM, etc. To choose which available products will be displayed in the OGL libraries pages, go to **Settings > Application**. Select the dropdown menu below "Available Products for Content Display in the OGL Libraries" and select all products that apply:

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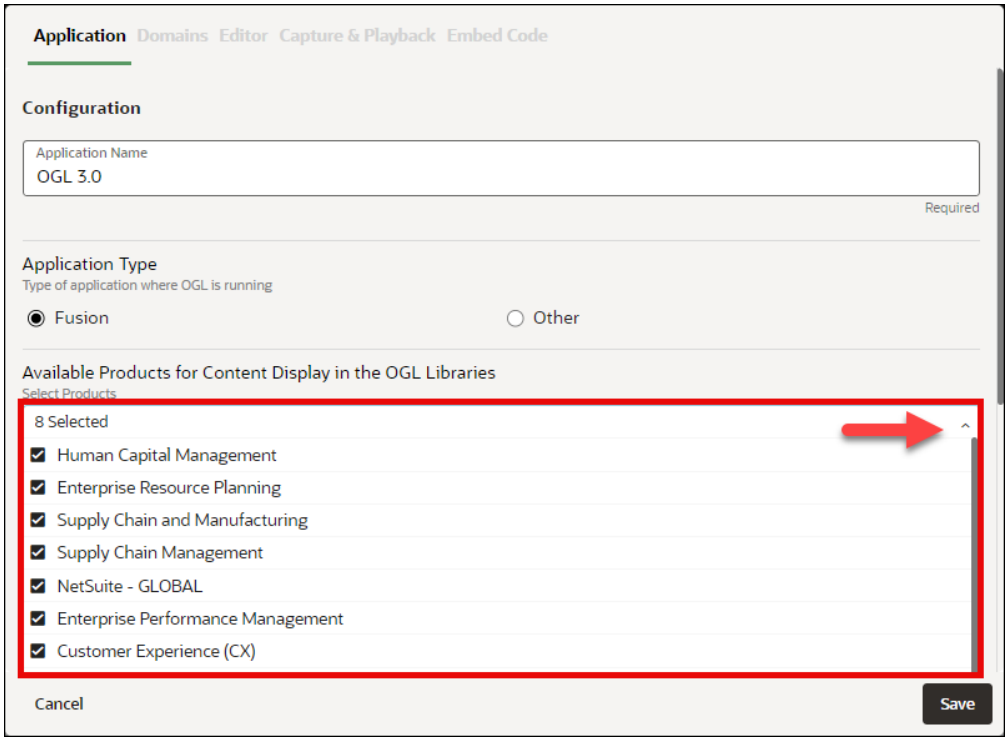
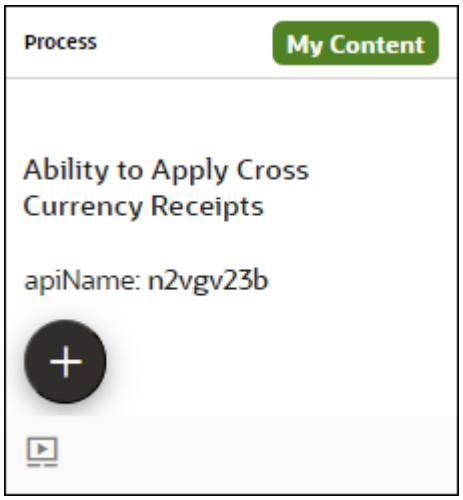


With any Base Guide content item, or guide, you can select **Preview** ( ) to see a preview of the content item or select **Copy to My Content** ( ) to import the item into your My Content library.



> **Note**
>
> Any content item that is displayed with a **My Content** (My Content) flag indicates that the item has already been copied into your My Content library. Selecting the **Copy to My Content** ( ) button again will replace and overwrite the existing item with an updated version of the Base Guide content.

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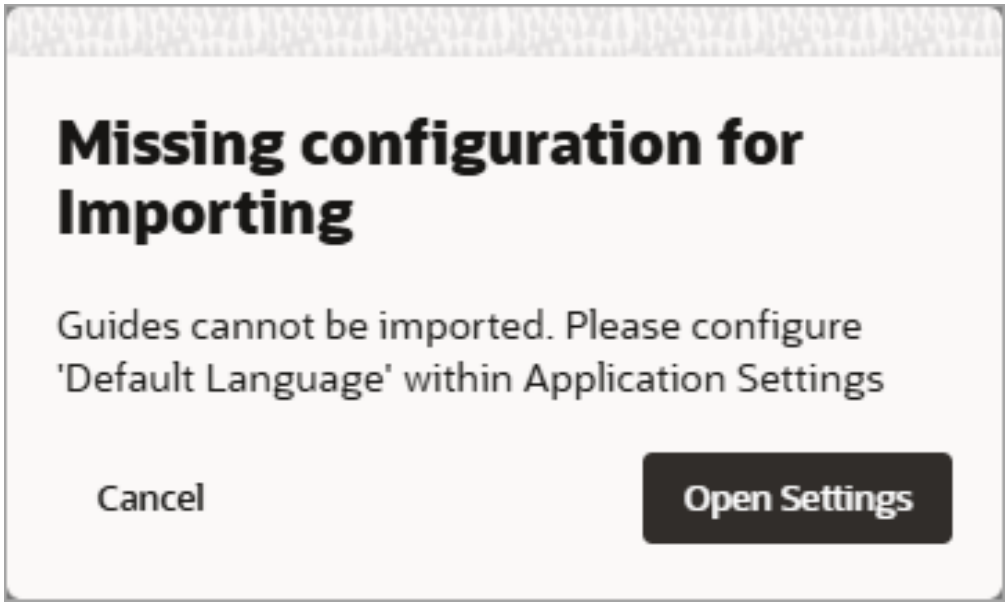
Default Language Configuration Required

Before importing any content items from the Base Guides library, you will need to configure the Default Language within the Application Settings for your OGL APPID. If this configuration has not been successfully applied, you may see the following error message when attempting to import any content item from this library:



Selecting the **Open Settings** button on the error message modal will take you directly to the Settings > Application modal where you can make the necessary configuration.

In Default Language dropdown menu in the Application Settings modal, select the language you wish to set as your default 'Generic Language'.

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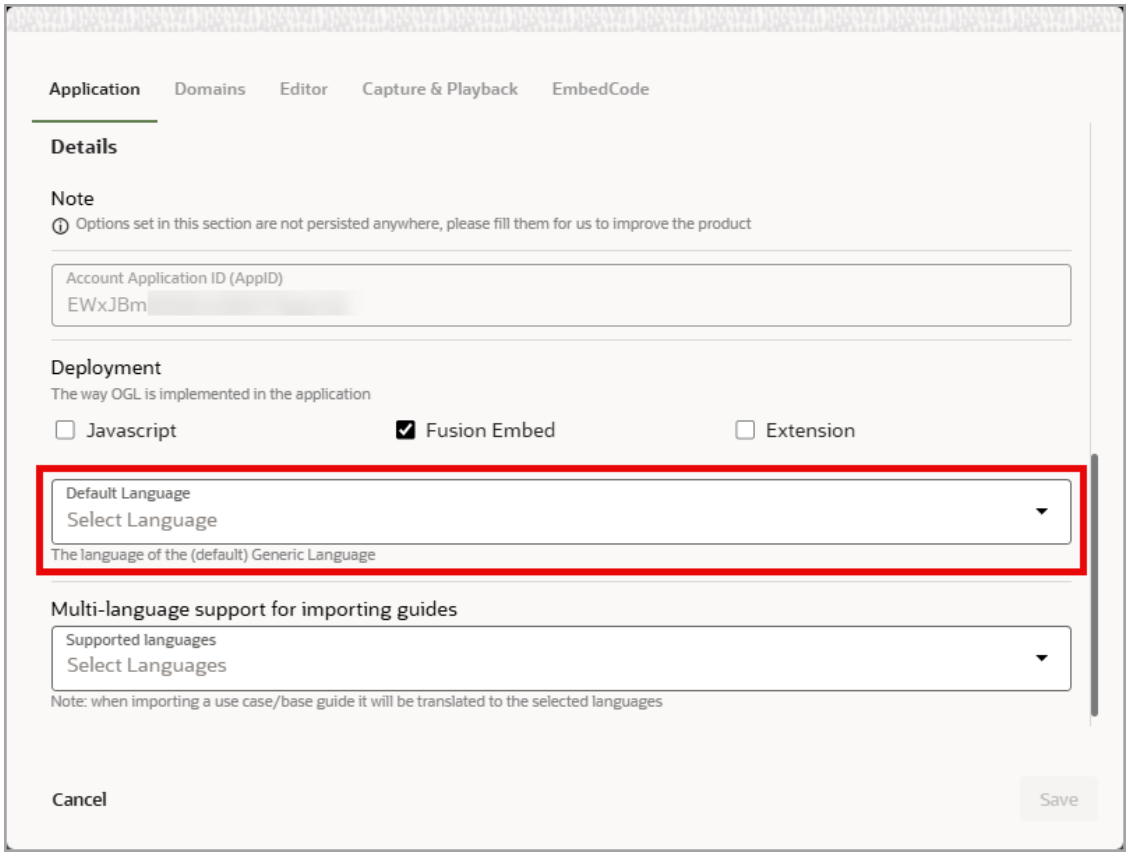

Multi-Language Support for Importing Guides

If you manage multi-language OGL content and intend to translate any imported Base Guides into other languages using OGL's Auto-Translation feature, you will need to select a Default Language that is supported for Auto-Translation.

For example, '**English**' is a Default Language that is supported for Auto-Translation; however, '**English - United States**' is not a supported language. If you select an unsupported Default Language, you will see the following message appear below the Default Language menu:

Once you select a supported Default Language, another dropdown menu will display below allowing you to select any additional languages you wish to support for importing guides. When importing any Use Case items, the guides will automatically be translated into these selected languages and will appear in their respective language folders in the My Content page.

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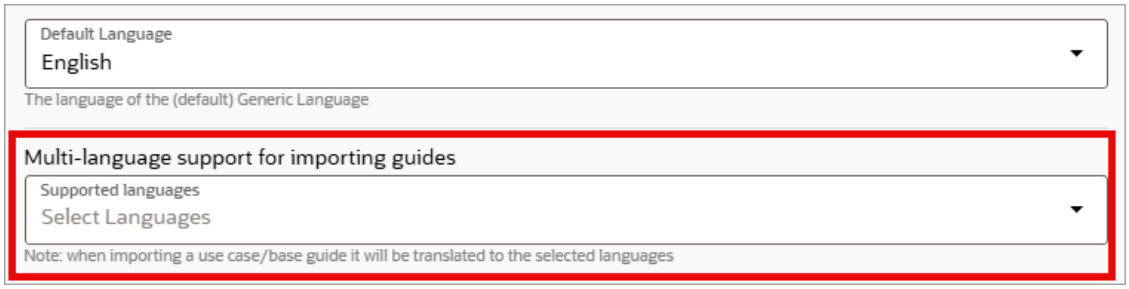
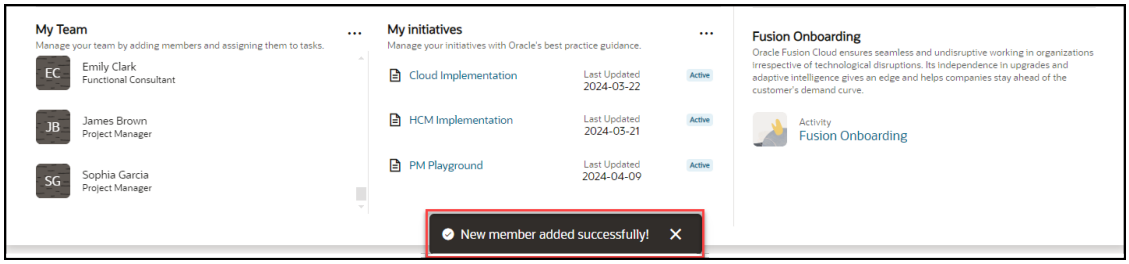


> **Note**
>
> For more information about OGL's Translations and Multi-Language capabilities, please refer to the following User Guide topic:
>
> https://docs.oracle.com/en/education/customer-success/guided-learning/user-guide/ogl-console-left-panel.html#GUID-6E4D558A-D3B8-4611-904F-B5610FA87144

Inclusion of 'Labels' on Content Management Report for Base Guides Library

The Content Management reports for Base Guides library now include label information, enabling teams to efficiently track and filter base content by labels such as release version or type of content. This enhancement improves visibility and addresses a frequently requested feature from both internal teams and clients.

From the left navigation, select Base Guides library.



Select the Kebab menu to the right of your Username and click on 'Content Management' (Appropriate permission required.)

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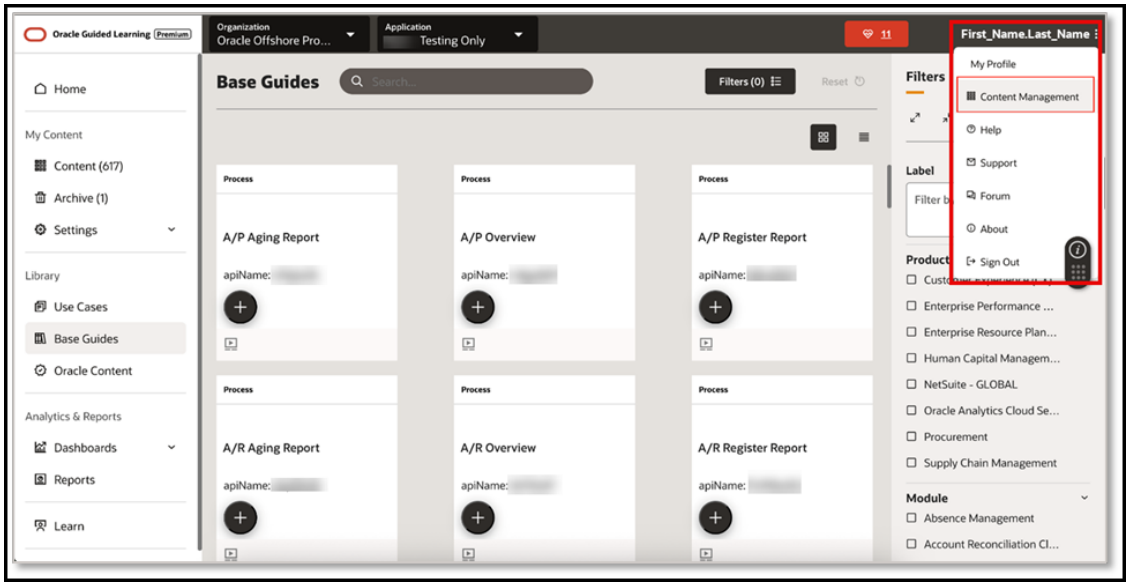
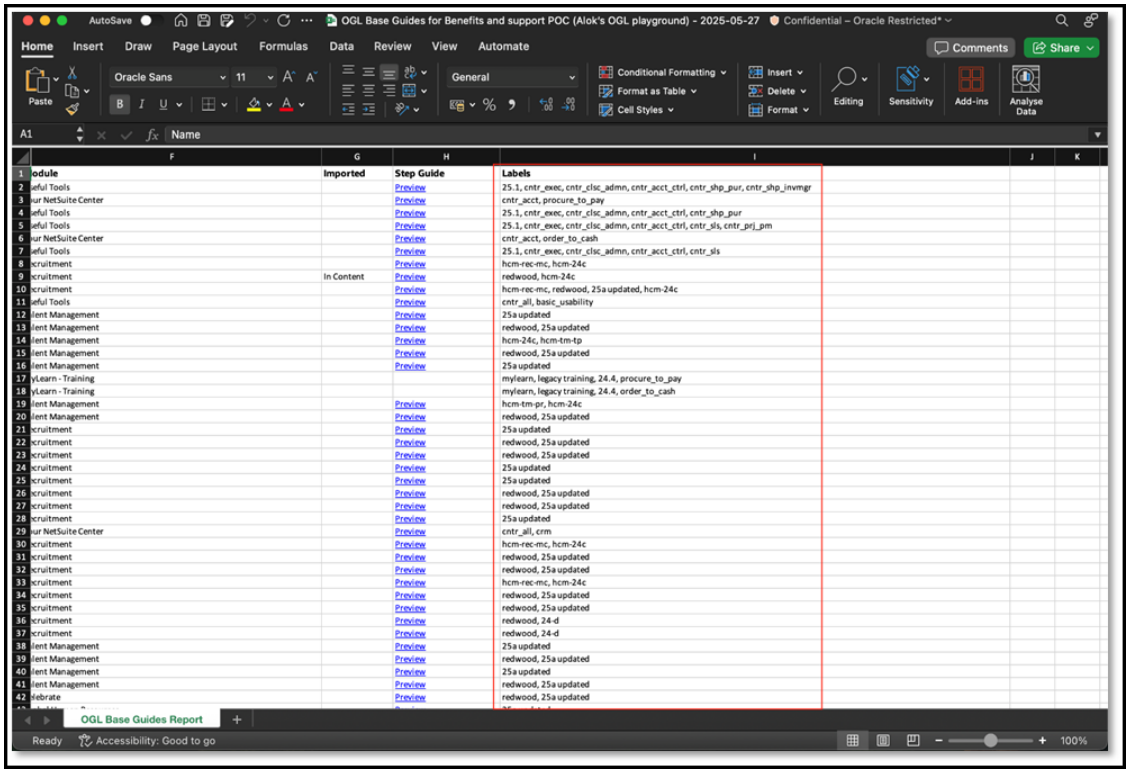


The content management report will be downloaded to your local machine; you will see the ‘labels’ field added as the last column in the report.



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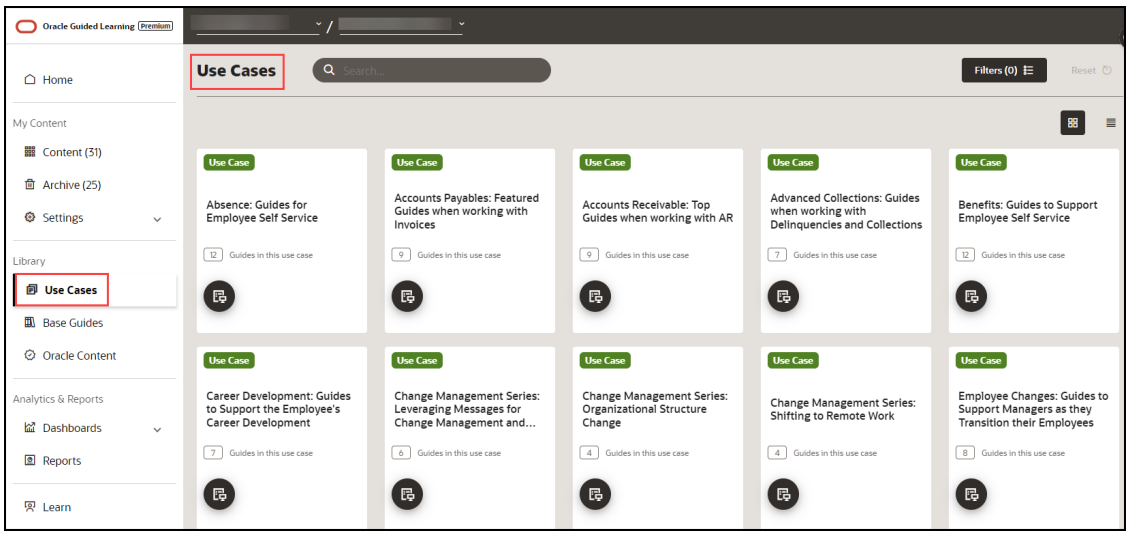
Use Cases

Use Cases are curated collections of pre-built guide packages that were designed by Oracle experts and are based on real business scenarios. Use Cases provide guide templates that employ Oracle best practices for various Oracle Fusion applications. Each Use Case may contain one or more guides of various categories, including Message guides, Process guides, Smart Tips, etc.

The **Use Cases** screen is displayed.



To switch between the views:

Use the **List View** icon (

) and the **Tile View** icon ( ) to switch between your preferred views.

By default, all the Use Cases are displayed in **Tile View**.

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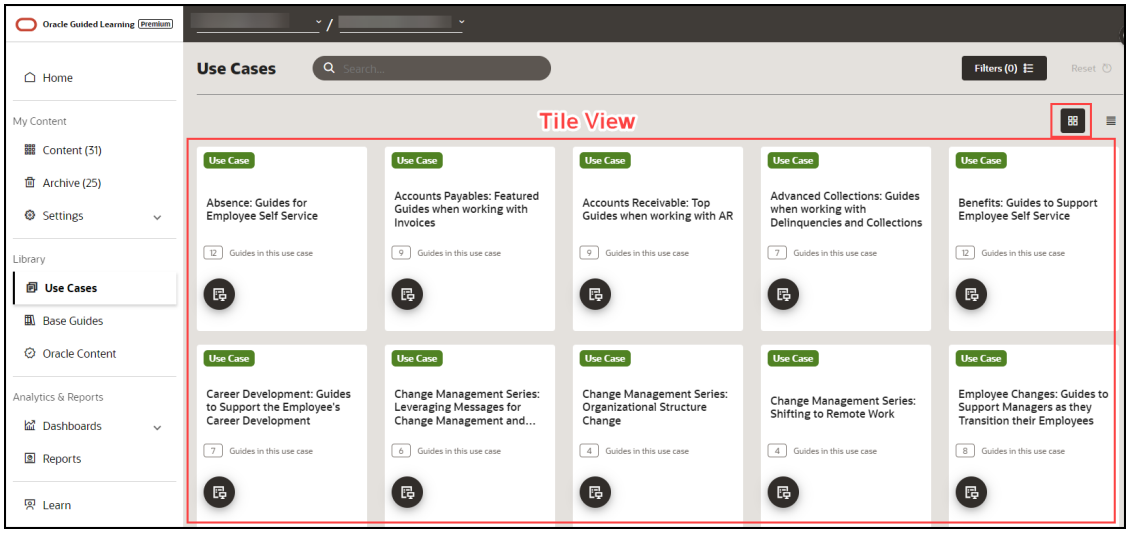
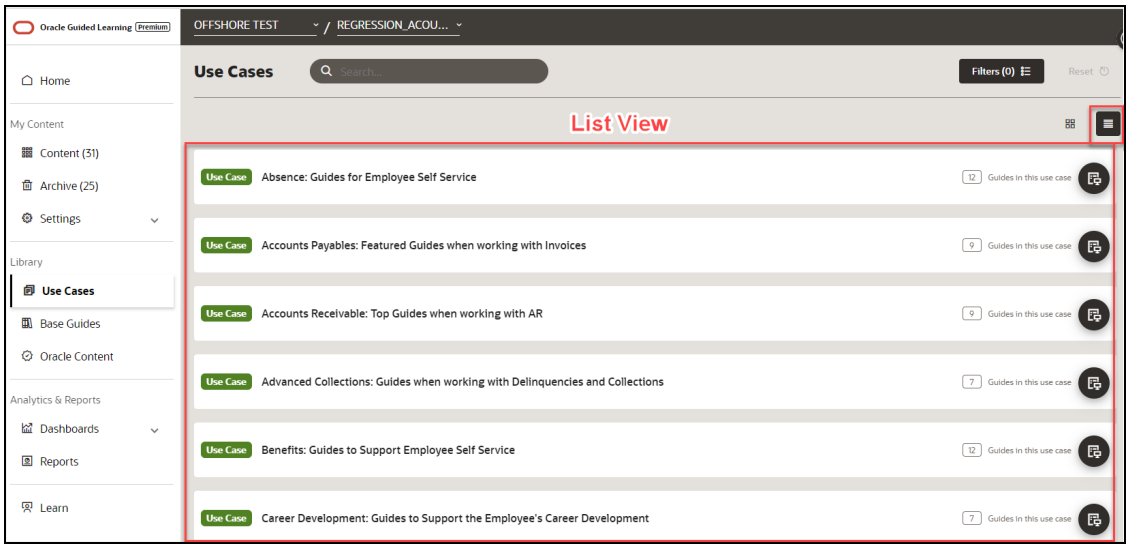


Select **List view** and you can view the use cases listed.



Applying Filters

The Use Cases library will display pre-built content items that are ready for you to import into your My Content library. You can use the preset Product and Module filters in the Filters panel to narrow the list of content items displayed based on specific application products.

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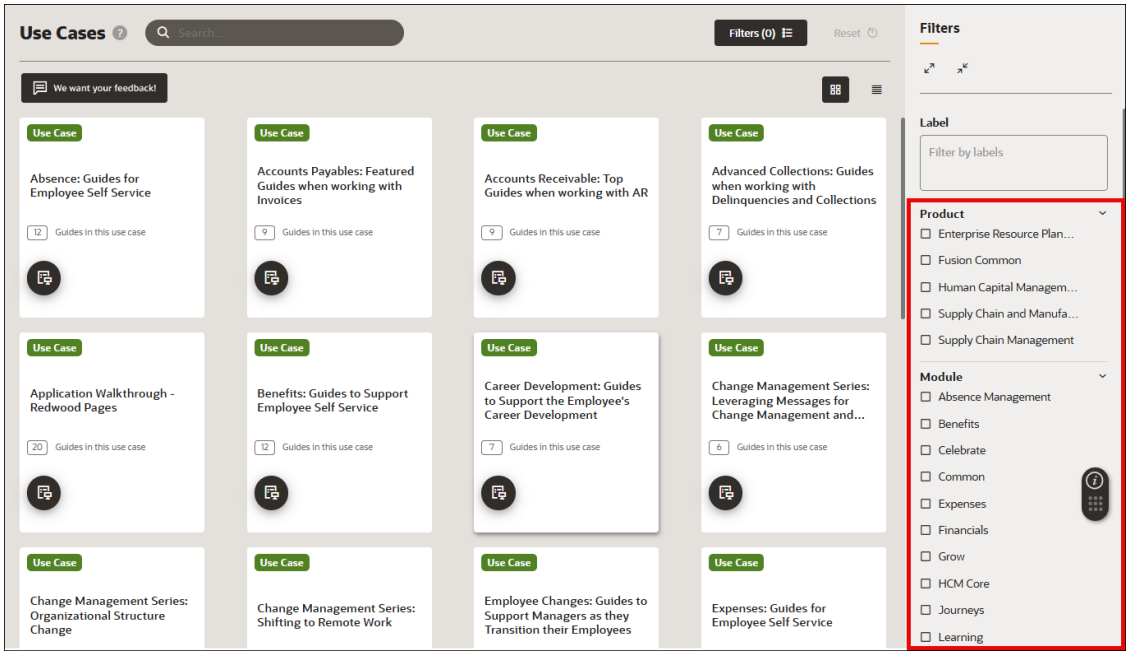
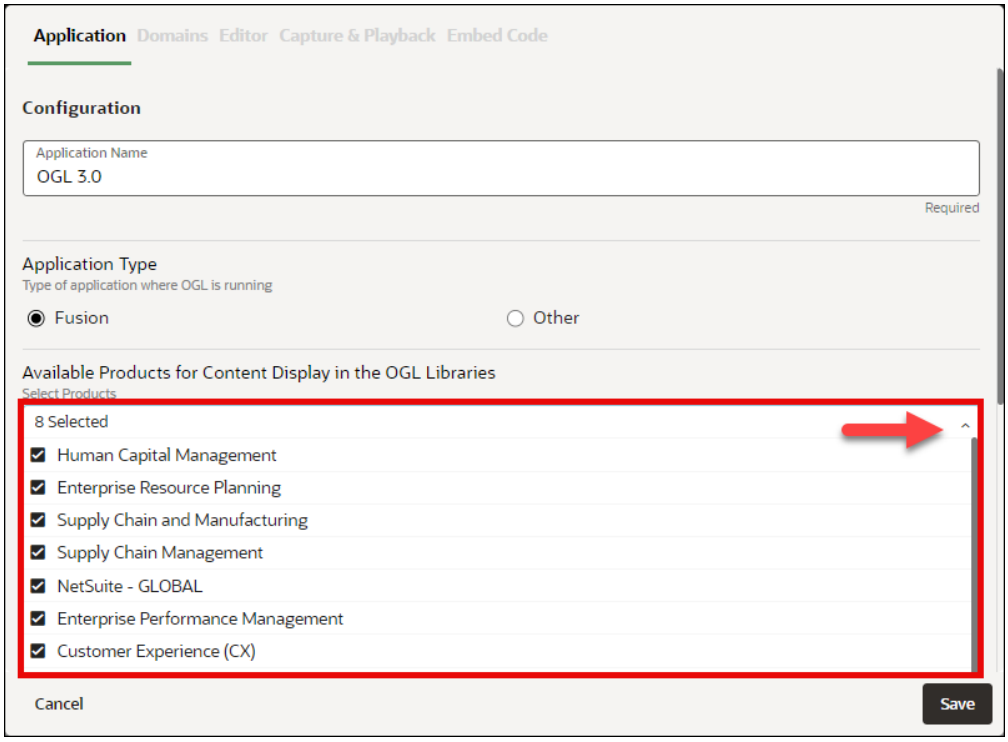


Use Cases are available for various Oracle Fusion applications, such as HCM, ERP, SCM, CX, etc. To choose which available products will be displayed in the OGL libraries pages, go to **Settings > Application**. Select the dropdown menu below "**Available Products for Content Display in the OGL Libraries**" and select all application products that apply:



With any Use Case content items, or guides, you can select **Preview** ( ) to see a preview of the content item or select **Copy to My Content** ( ) to import the item into your My Content library.

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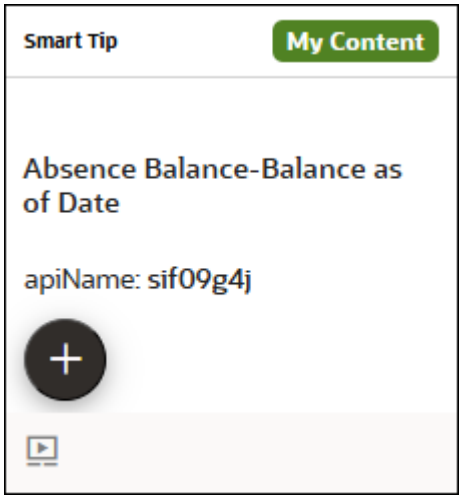

> **Note**
>
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Default Language Configuration Required

Before importing any content items from the Use Cases library, you will need to configure the Default Language within the Application Settings for your OGL APPID. If this configuration has not been successfully applied, you may see the following error message when attempting to import any content item from this library:

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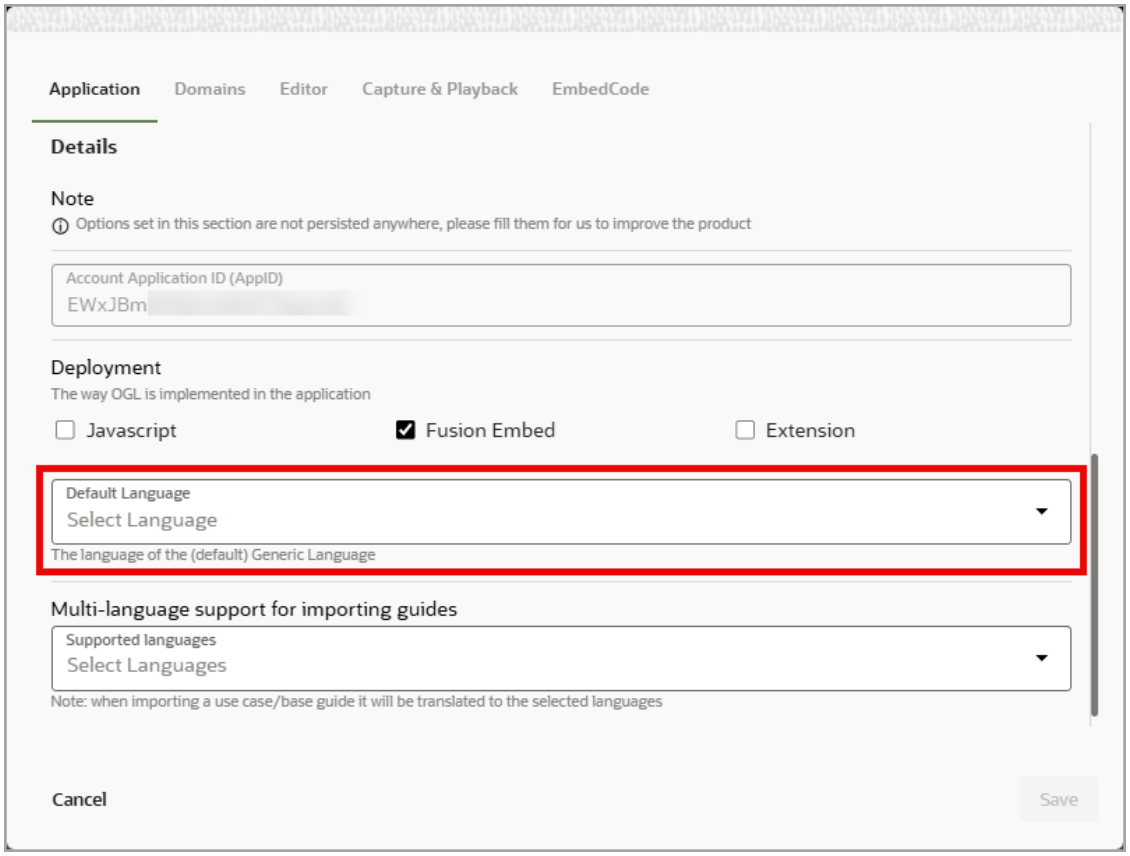

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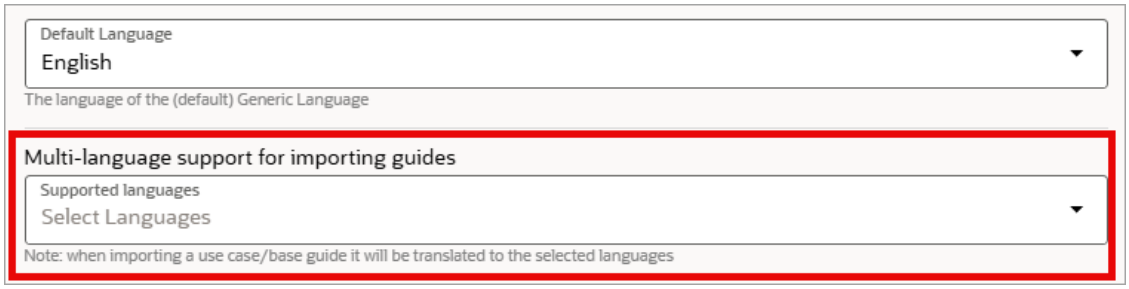
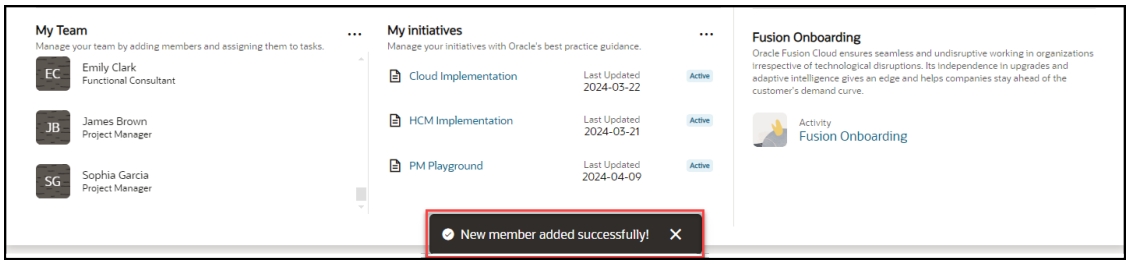


> **Note**
>
> For more information about OGL's Translations and Multi-Language capabilities, please refer to the following User Guide topic:
>
> https://docs.oracle.com/en/education/customer-success/guided-learning/user-guide/ogl-console-left-panel.html#GUID-6E4D558A-D3B8-4611-904F-B5610FA87144

Inclusion of 'Labels' on Content Management Report for Use Cases Library

The Content Management reports for Use Cases library now include label information, enabling teams to efficiently track and filter base content by labels such as release version or type of content. This enhancement improves visibility and addresses a frequently requested feature from both internal teams and clients.

From the left navigation, select Use Cases library.



Select the Kebab menu to the right of your Username and click on 'Content Management' (Appropriate permission required.)

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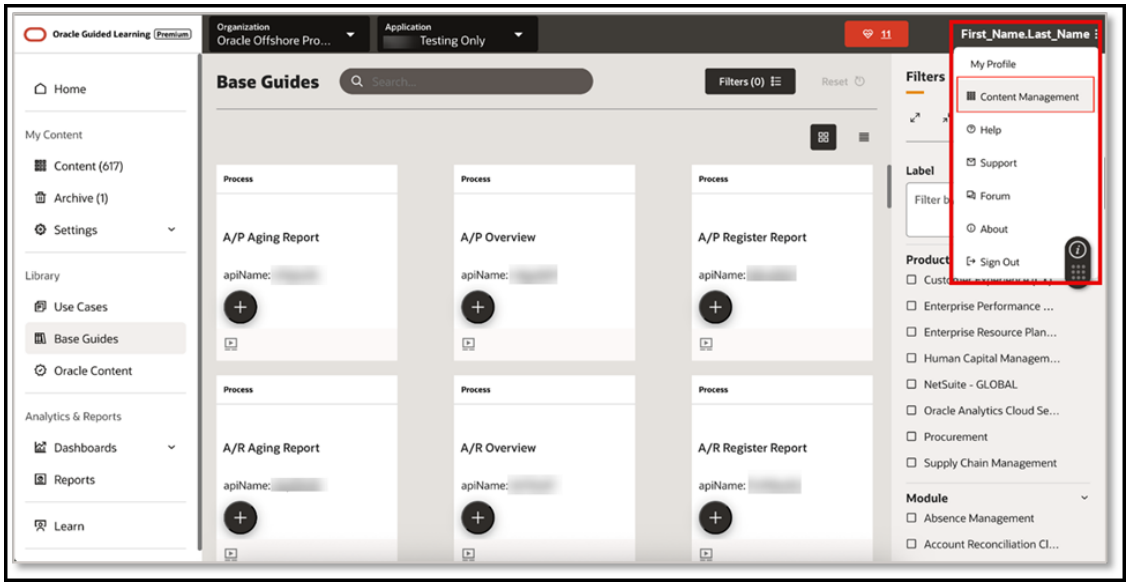
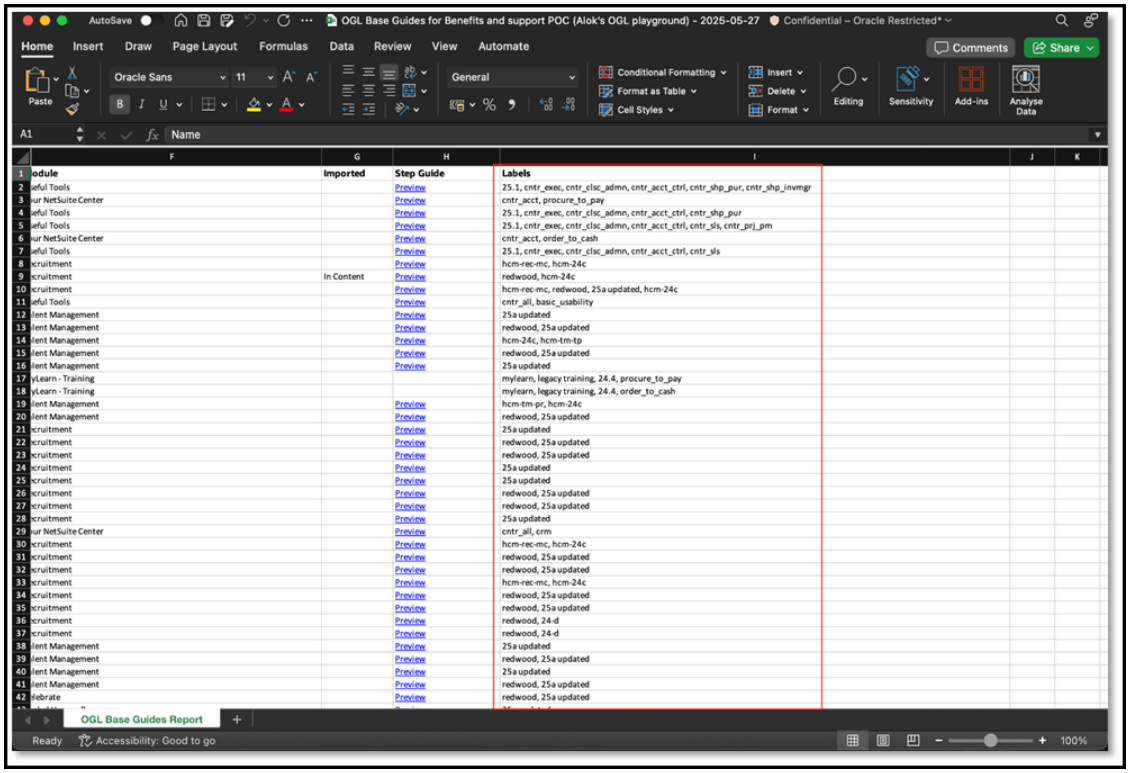


The content management report will be downloaded to your local machine; you will see the ‘labels’ field added as the last column in the report.



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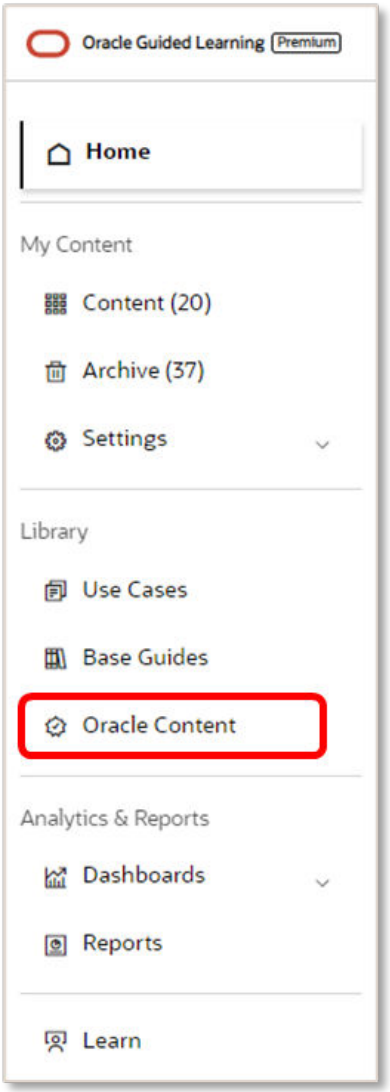
Oracle Content

The Oracle Content library and settings allows customers to have expert-developed content designed to support Fusion (HCM, ERP, SCM, and CX) Specialists as they navigate the Fusion application environment. The content is developed and tested by Oracle expert teams and guides users to information and practices that avoid the need for certain types of My Oracle Support service requests. Once enabled on the customer account, a new item labelled Oracle Content will appear in the Library section of the left navigation, which will open the Oracle Content settings panel.

Once enabled and activated, Oracle Content is immediately available in the application environment based the which Fusion products/modules you choose. Administrators do not need to add the content to their My Content library or test it.



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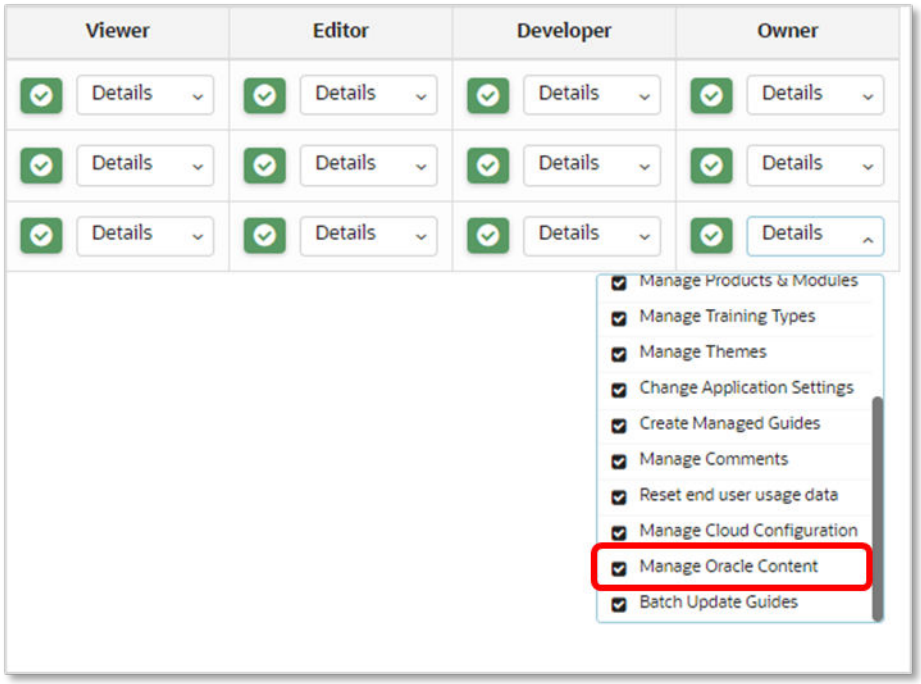
> **Note**
>
> Access to the settings panel requires the "**Owner > Manage Oracle Content**" security permission available within User Management. When the security permission is selected, the user can see and update the settings within Oracle Content.



Through the Oracle Content settings panel, administrators can opt-in/opt-out of content categories (i.e., My Oracle Support and Oracle Customer Success) and enable content by Fusion products/modules according to their application footprint. Content can be enabled or disabled within the development and/or production environments for any available Fusion product.

In the Oracle Content settings modal, select **View Details** next to the content category you wish to configure to expand the list of the available Products.

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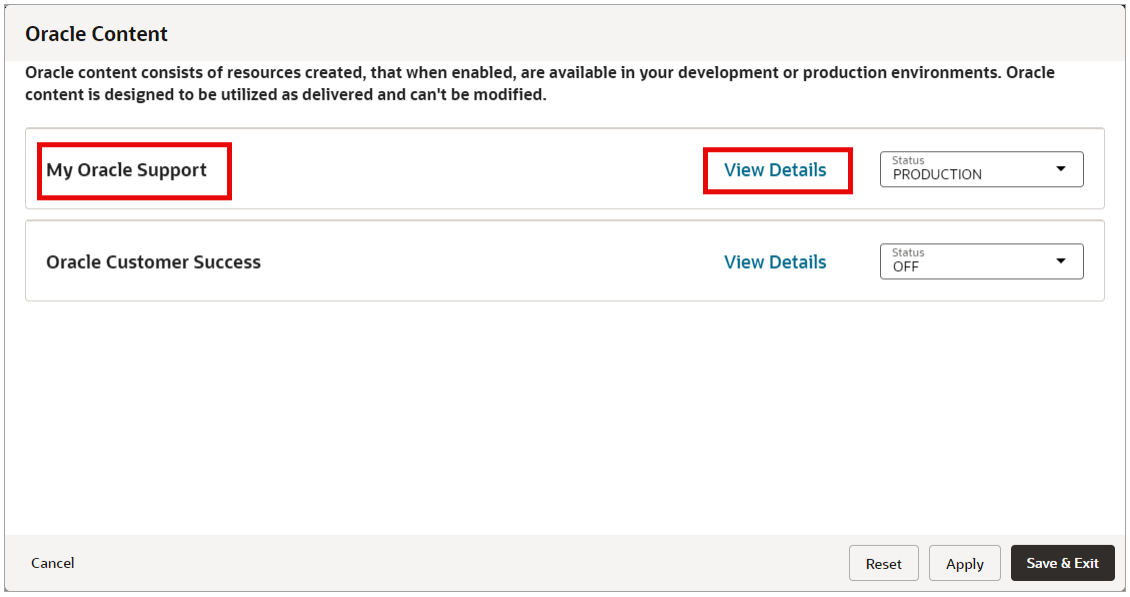

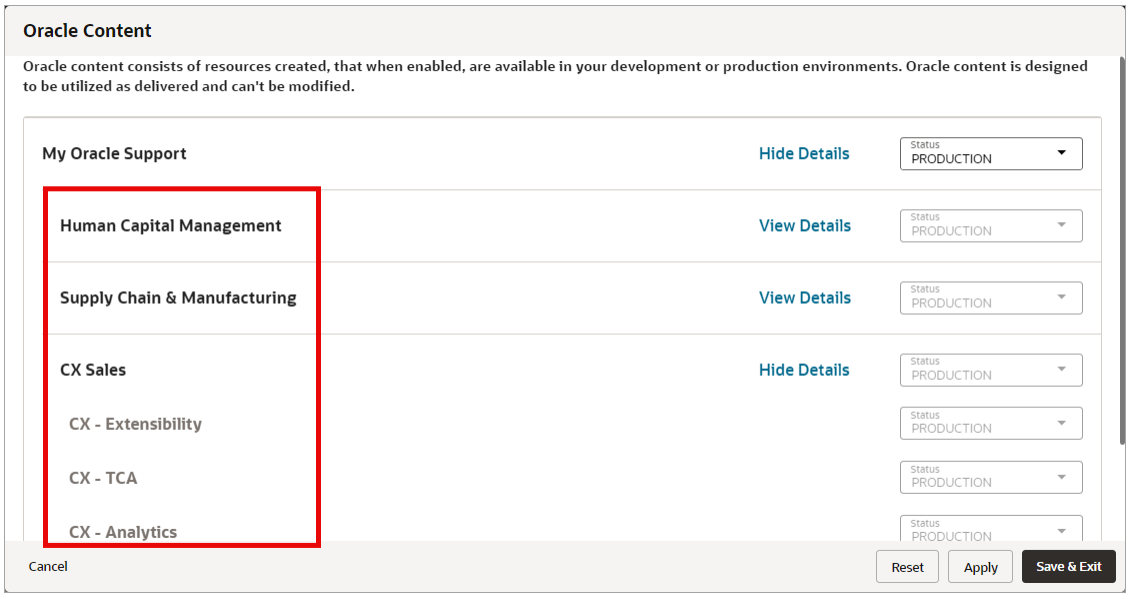

You can enable/disable content in either Development or Production environments for each category (i.e., My Oracle Support or Oracle Customer Success) and for any Product (e.g., HCM, ERP, SCM, CX, etc.) by selecting **View Details** next to the corresponding category/ product to expand.

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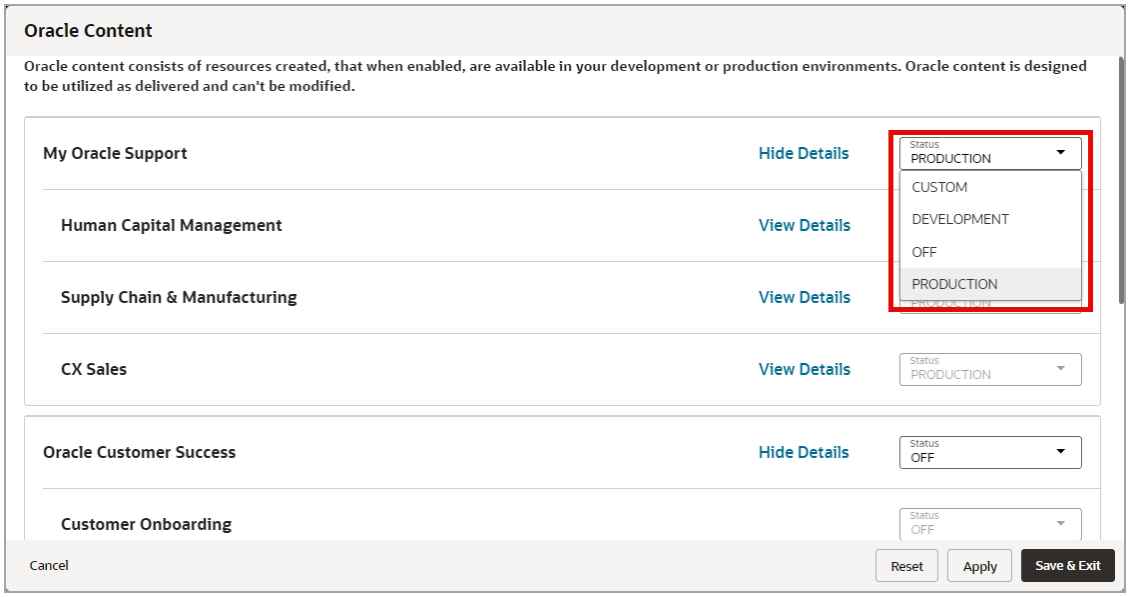
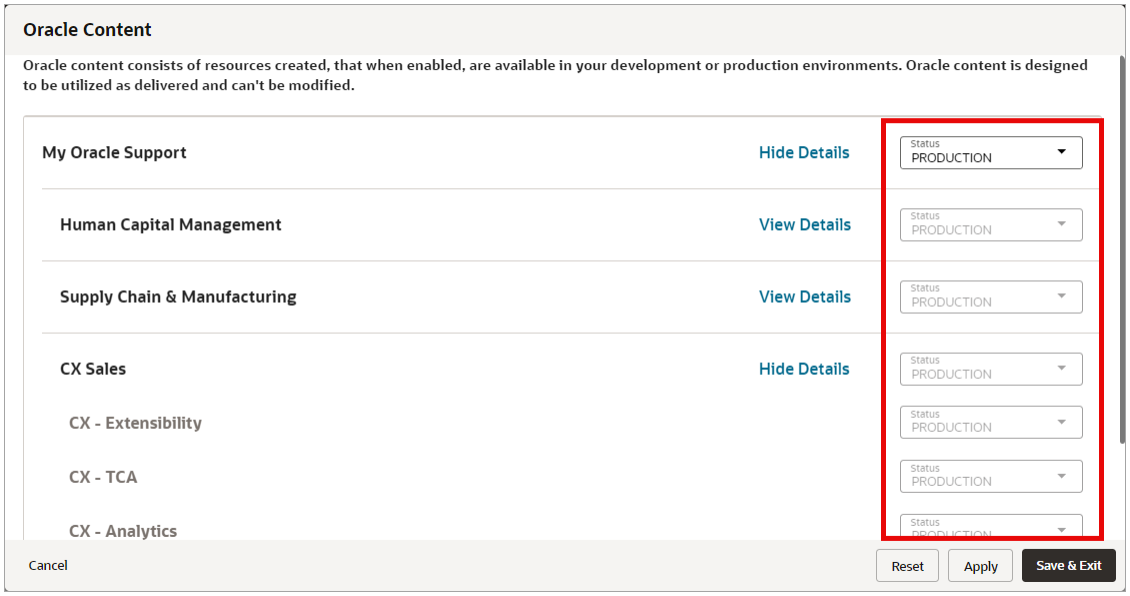


Changing the **Status** at the parent-level will apply the same setting to all child-level options, as shown below.



Selecting **Custom** for any category or product will allow you to configure settings individually.

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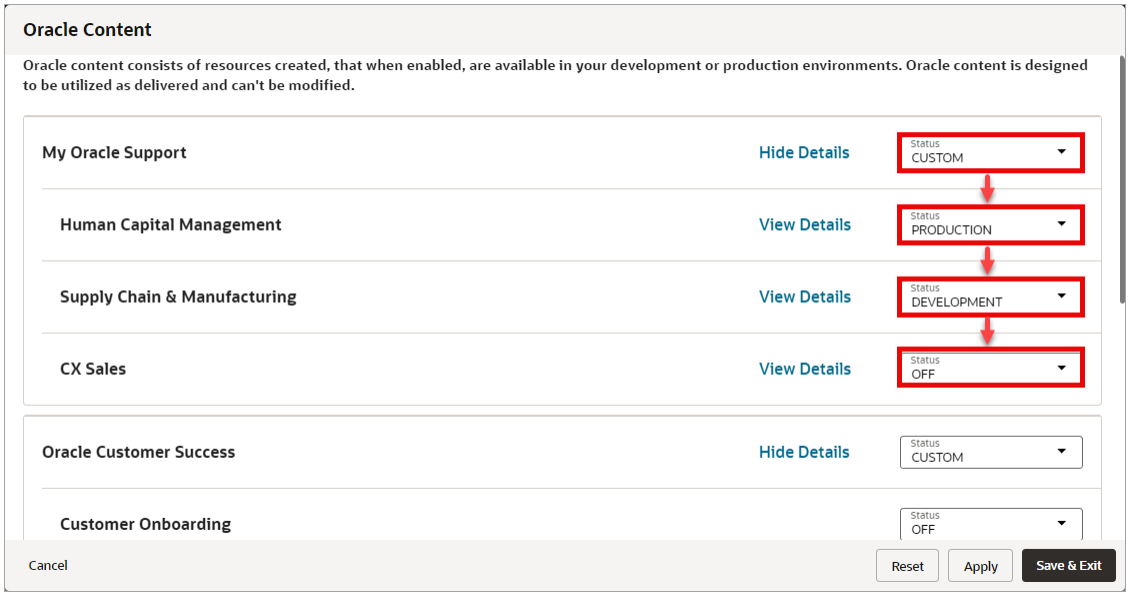
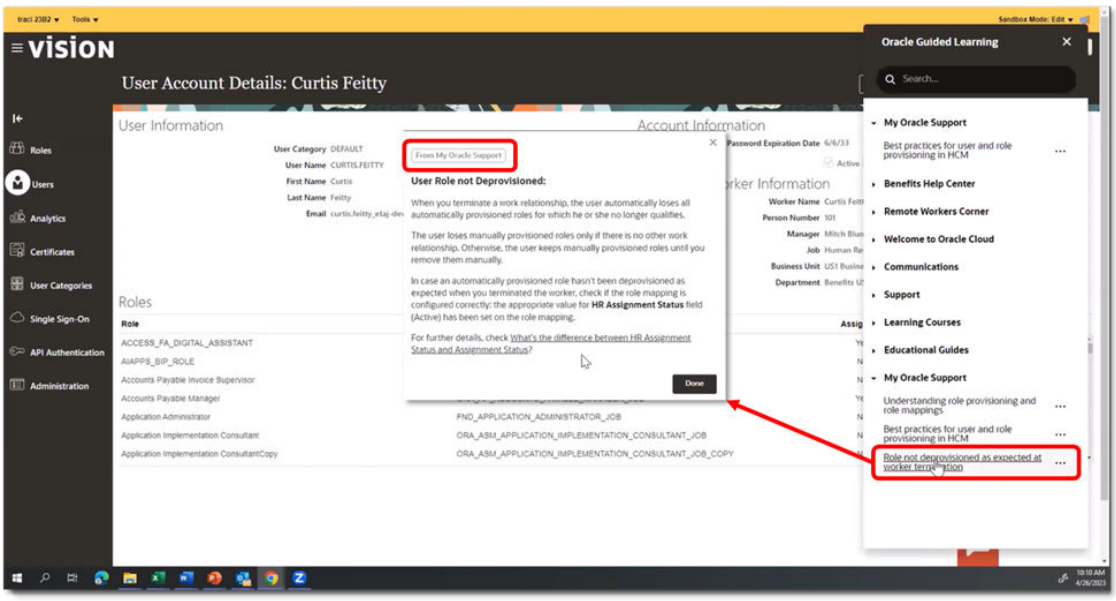


> **Note**
>
> Oracle Content guides are page-specific and will only display when the user navigates to the appropriate page with which the guides are associated and tagged.

Below is an example guide from the **My Oracle Support** category:



Oracle Content FAQs

Q: Who developed the content available through Oracle Content?

A: Guided Learning has partnered with various Oracle teams including Product Management, My Oracle Support and Customer Success to develop content for customers.

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Q: Will all the content be immediately available?

A: No, the content will continue to be updated over the course of releases. The first content available will be from the My Oracle Support team.

Q: What types of content is available through Oracle Content?

A: Our expert teams have created content using a variety of guided learning guide types including training links, smart tips, messages, beacons, and process guides.

Q: Who is the primary consumer of Oracle Content guides?

A: Depending upon the category. The My Oracle Support content is designed primarily for the Specialist or Administrator roles who are completing business process transactions in the system.

Q: Where in the application environment will I see the content?

A: Depending upon the category. Some categories prefer to only display content in the Guided Learning Widget as where other categories have guides spread throughout the application that appears when certain conditions are met.

Q: Is the content tied to the application security roles?

A: No, the content is not tied to any application security roles. However, many of the content items are directly connected to pages or transactions. Thus, if the user has security to the page or ability to complete the transaction, they will have access to the content.

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7

Organizing OGL Content

Overview

OGL offers multiple tools to help you organize and manage your library of OGL content items. These tools include filters that allow you to narrow the list of content items by specific parameters, such as Fusion Products and Modules as well as custom labels. Below is a summary of guide management tools available to help you efficiently organize your content items and reduce time searching for specific items.

Understanding Products

As your content library grows, it can become increasingly difficult to manage a large volume of guides, especially if you have OGL deployed to multiple Fusion products (e.g. HCM, ERP, etc.) and/or modules (e.g., Financials, Procurement, Human Resources, Recruiting, etc.). One way to organize your guides may be to categorize them by the Fusion products and modules to which they are associated. Whether you are using OGL in Fusion or other applications, product and module labels allow you to manage your guides more efficiently, making it easier to find, filter, and organize guides by their respective products and modules. The Products and Modules features enable console users to create, edit, and manage custom labels which can then be tagged to guides for use in filtering in both the Content library as well as Analytics.

Accessing the Interface

1. On the OGL Console homepage, go to the left navigation panel.
   You can see the **Settings** tab on the left navigation panel.
2. Select **Products** from the **Settings** tab on the left navigation panel.

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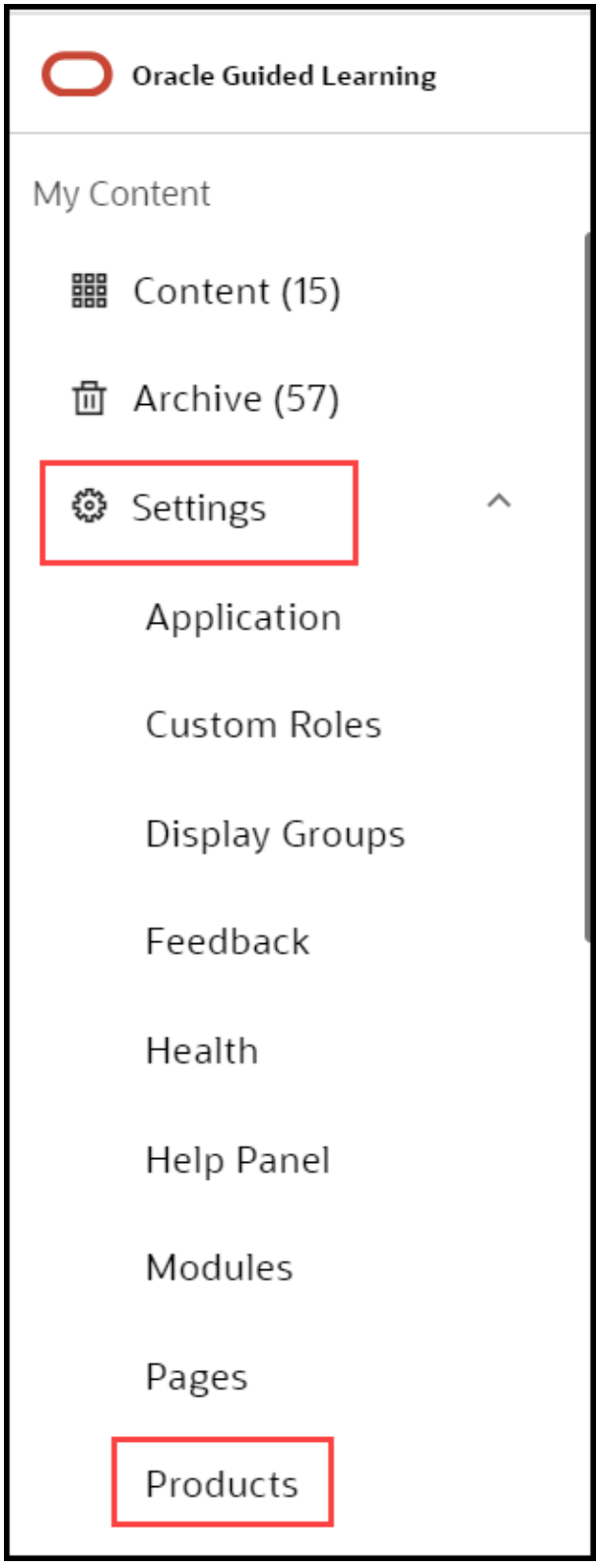

Understanding the Interface

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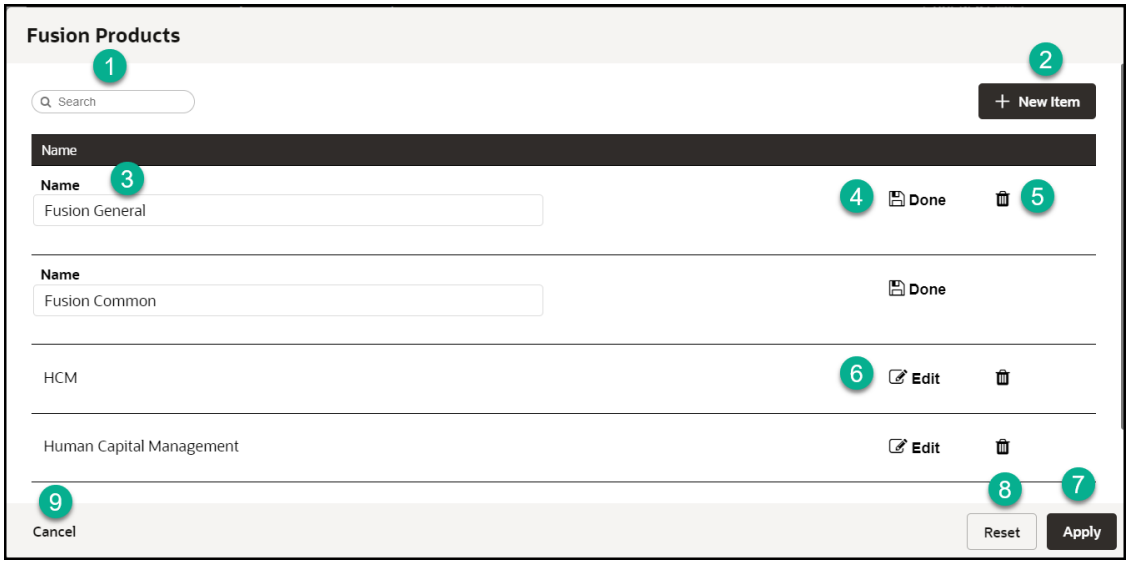

Legend	Name	Additional information
1	Search	Provides dynamic search functionality.
2	New Item	Adds a new line to the list.
3	Name field	The name field cannot be empty. Duplicate values are not allowed.

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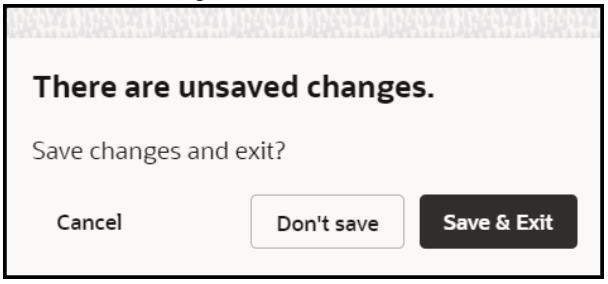
Legend	Name	Additional information
4	Done/Save	Saves the changes made to the field. The button only becomes active when an acceptable value is entered in the field.
5	Edit	Allows changes to be made to the field.
6	Delete	Deletes the line item. Action cannot be reversed and all linked content items will be disassociated.
7	Apply	Saves the changes made. A confirmation is displayed if the operation has either been completed successfully or failed with errors.
8	Reset	Reset the changes made. A warning will be displayed if there are unsaved changes.
9	Cancel	Discards any changes that were made and closes the interface. A warning will be displayed if there are unsaved changes. 

Using Product Filters

You can use the Product labels to filter your guides by their respective products.

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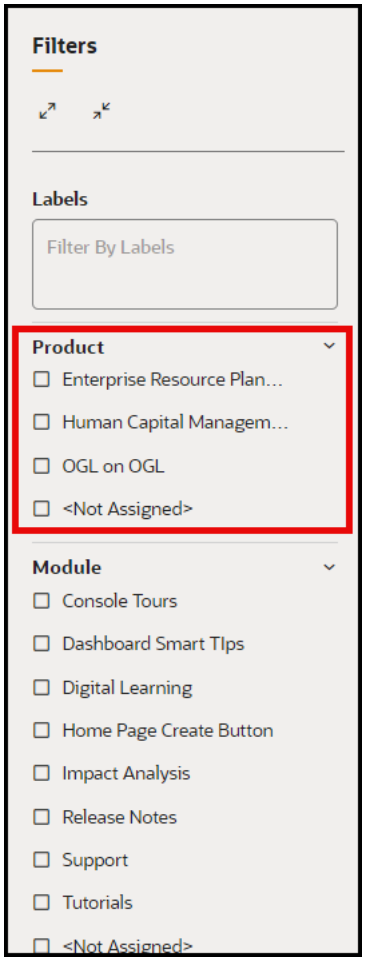

Understanding Modules

As your content library grows, it can become increasingly difficult to manage a large volume of guides, especially if you have OGL deployed to multiple Fusion products (e.g. HCM, ERP, etc.) and/or modules (e.g., Financials, Procurement, Human Resources, Recruiting, etc.). One way to organize your guides may be to categorize them by the Fusion products and modules to which they are associated. Whether you are using OGL in Fusion or other applications, product and module labels allow you to manage your guides more efficiently, making it easier to find, filter, and organize guides by their respective products and modules. The Products and Modules features enable console users to create, edit, and manage custom labels which can then be tagged to guides for use in filtering in both the Content library as well as Analytics.

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Accessing the Interface

1. On the OGL Console homepage, go to the left navigation panel.
   You can see the **Settings** tab on the left navigation panel.
2. Select **Modules** from the **Settings** tab on the left navigation panel.

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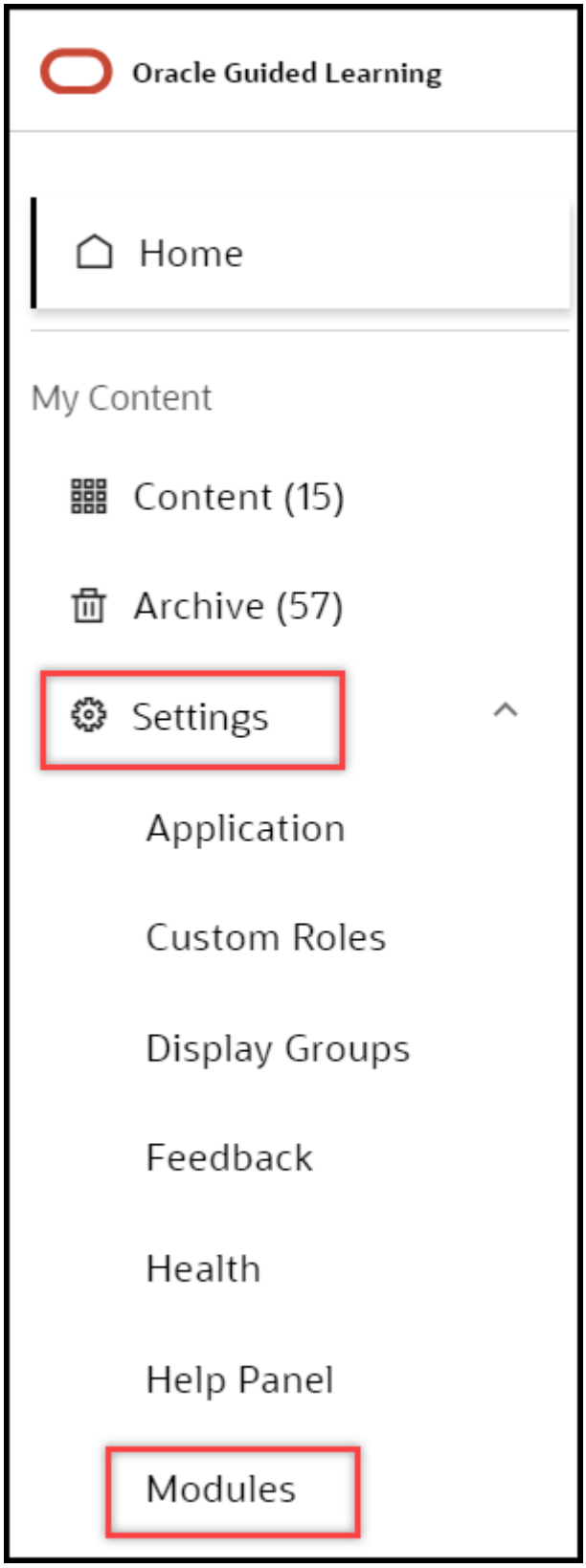

Understanding the Interface

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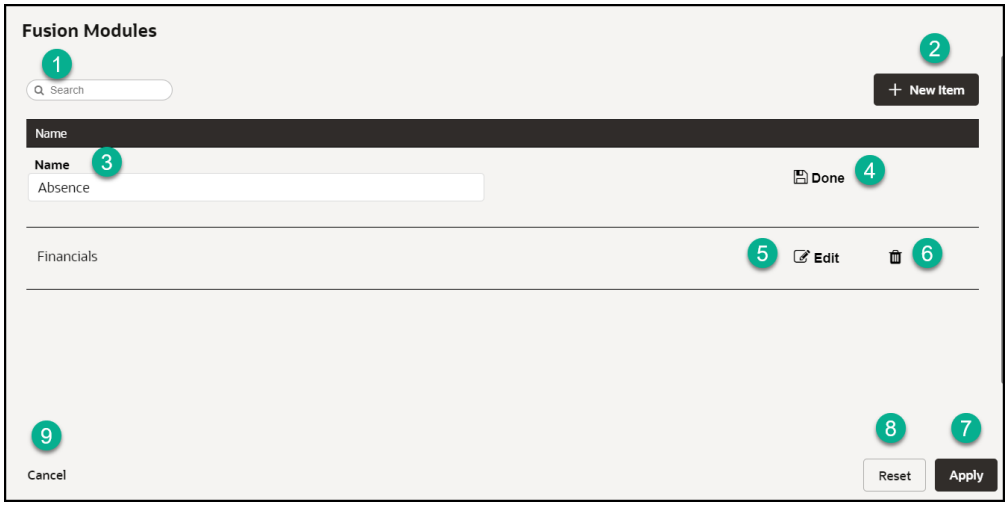

Legend	Name	Additional information
1	Search box	Provides dynamic search functionality.
2	New item	Adds a new line to the list.
3	Name field	The name field cannot be empty. Duplicate values are not allowed.
4	Done	Saves the changes made to the field. The button only becomes active when an acceptable value is entered in the field.

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Legend	Name	Additional information
5	Edit	Allows changes to be made to the field.
6	Delete	Deletes the line item. Action cannot be reversed and all linked content items will be disassociated.
7	Apply	Saves the changes made. A confirmation is displayed if the operation has either been completed successfully or failed with errors.
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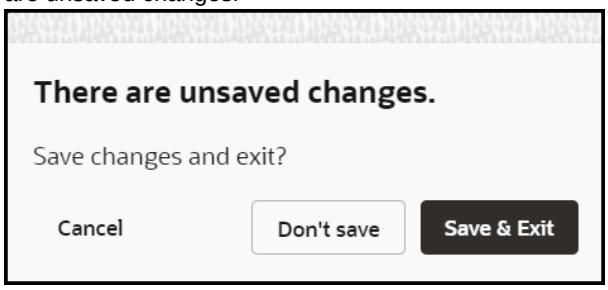
9	Cancel	Discards any changes that were made and closes the interface. A warning will be displayed if there are unsaved changes. 

You can use the Module labels to filter your guides by their respective modules.

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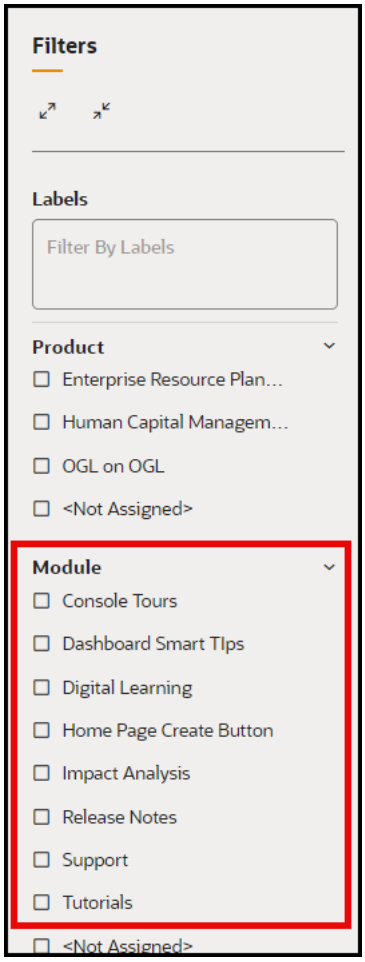

Guide Lifecycle Management Using Labels

As an OGL content developer or content manager working in collaboration with others, you may need to quickly understand the status of guides throughout the content development cycle, and easily find the guides that you need to work on, so that you can efficiently take action on tasks that are your responsibility.

This enhancement enables administrators and content developers to better manage guides throughout the content lifecycle by employing custom labels that clearly identify the status of your guides accordingly to your own organizational needs.

With this enhancement, console users can create, manage, and assign custom labels to guides for use in organizing and filtering guides accordingly to their custom labels. Labels can also be created, assigned, and managed for multiple guides as a bulk action.

Managing labels for individual guides

For individual guides, labels can be created, assigned, or removed at the guide level by using the **Guide Settings**:

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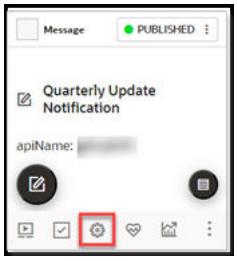
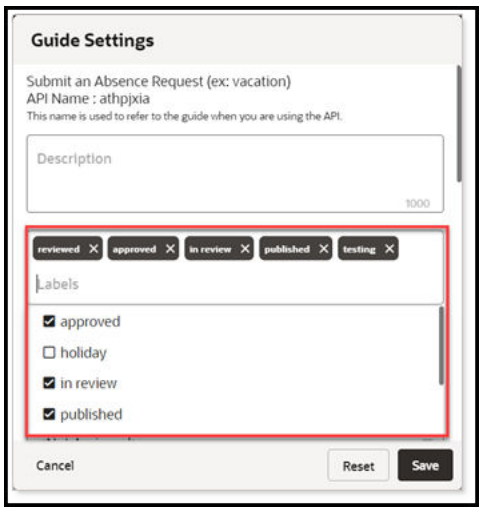
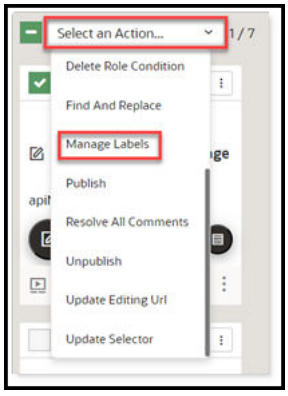




Managing labels for multiple guides (Bulk Action)

For multiple guides, labels can also be created, assigned, edited, or removed in bulk by using the **Manage Labels** action in the **Bulk Actions** menu:



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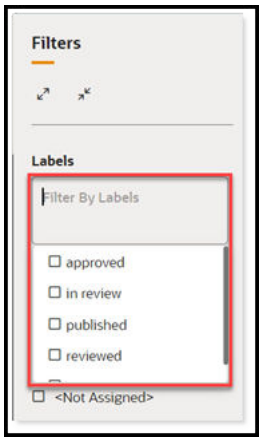
> **Note**
>
> The Mange Labels bulk action requires the Owner role > Batch Update Guides permission:

Filtering Guides by Labels

Once labels are assigned to guides, you can filter guides based upon their labels by using the **Labels** filter in the OGL console located on the right side of the My Content page:



Known Issues/Expected Behavior

- Once labels are created, they will automatically populate in the Labels field in the Guide Settings and Manage Labels modals only for the AppID on which the labels were created.

While you can create, assign, or remove labels for individual guides or multiple guides, you will not be able to delete any labels once they have been created. Look for an enhancement to this feature in a future release.

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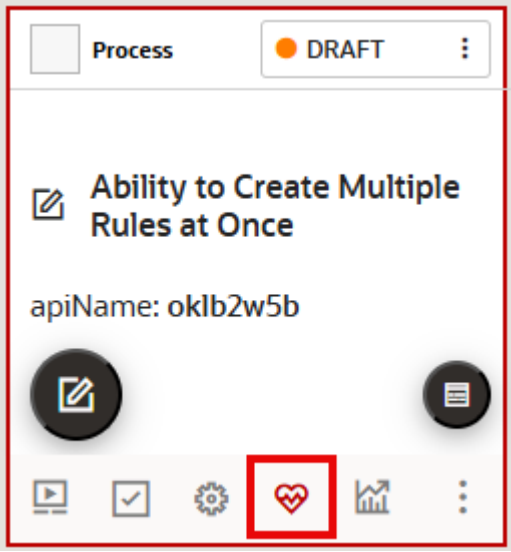
8

Guide Health

Developers can review guide issues from either the guide card for an individual guide or a list of all errors from the navigation panel.

View errors of a single guide

If a guide has an error, for example if a smart tip has been incorrectly flagged as a sticky guide, this will show on the guide card as an error, as in the image below.



You can click on the icon to display the error in the Guide Health modal.

Viewing all errors in your application

Clicking on the error link shows details about the reported error and any recommendations to resolve it. You can now make the necessary change to the guide to resolve the issue if needed.

Alternatively, you can also see all guide health issues by selecting the Check Guide Health icon located at the top of the console.

1. Open Guide health modal from the heart button on the top right corner of the console.

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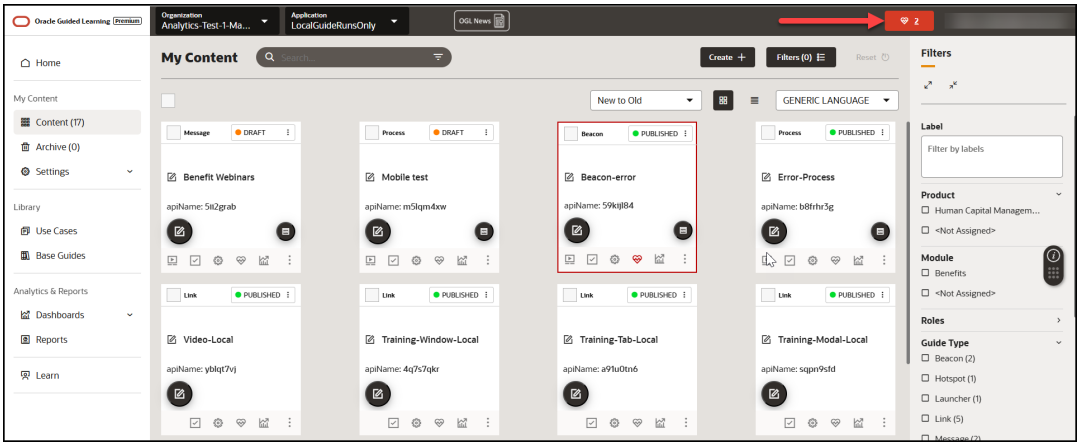
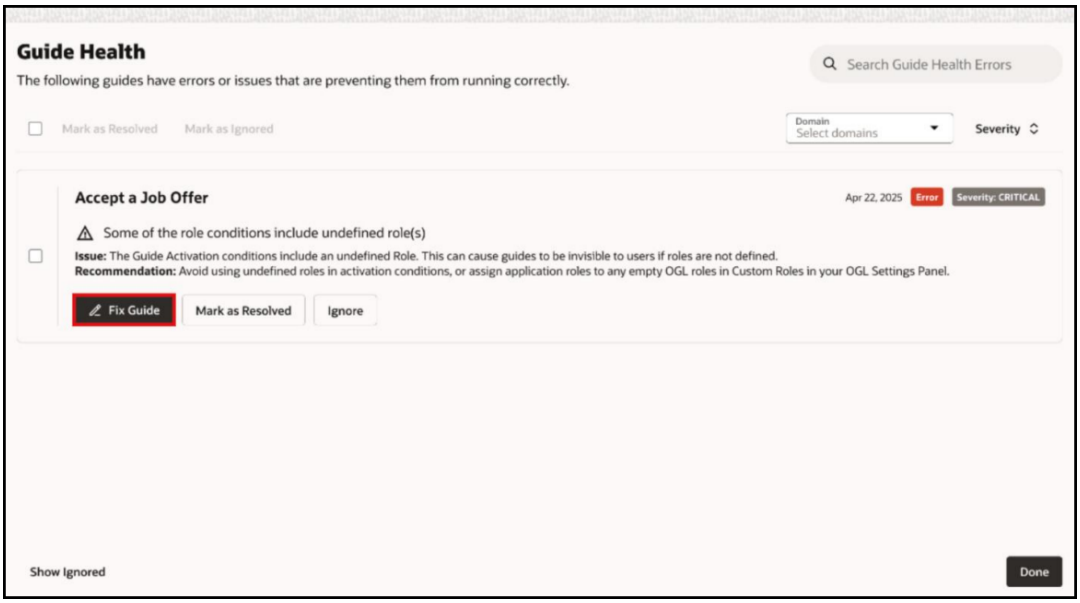


2. The Guide health modal opens displaying the guide error. Click on the **Fix Guide** button to go ahead and fix the issue.



3. Clicking on the Fix guide button redirects you to the required location to fix the error, which in this case, is the Activation conditions modal.There is also an OGL guide up and running to provide instructions on how to fix the error.
p

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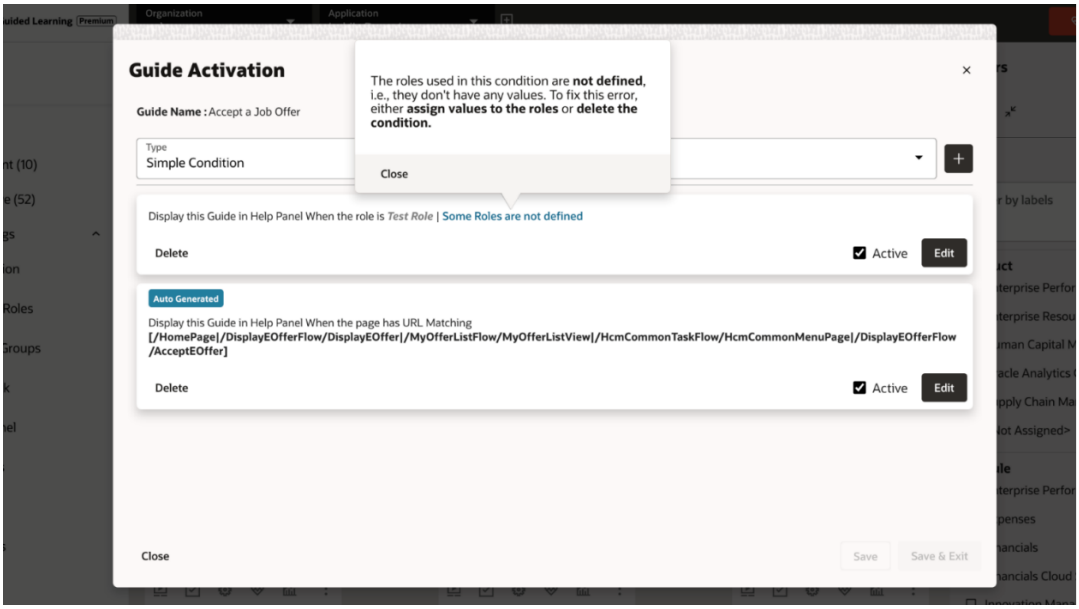

4. The guide instructs the user to assign values to undefined roles or delete the condition. The user would like to assign a value to the role and clicks on the pointed link. This redirects them to the required location, i.e. the Custom Roles modal.

5. Notice how the guide continues to this place as well, instructing the user on what must be done.
6. The user now adds a value to the role and clicks on **Save**.
7. The error is now fixed!

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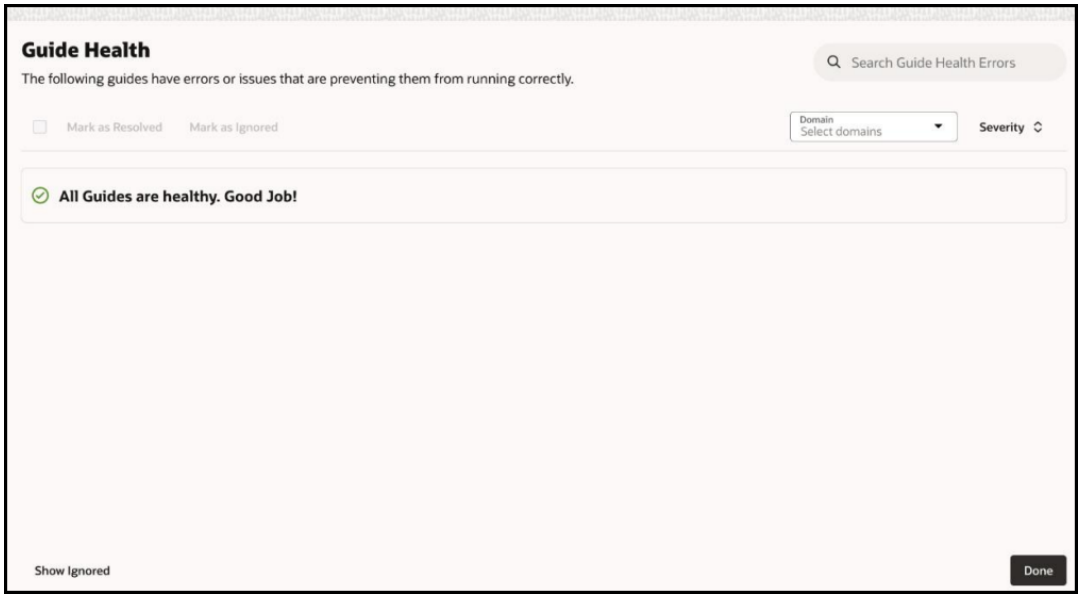

> **Note**
>
> This is an example user flow and the behavior would be different based on the guide error that the user is trying to resolve.

Known Issues/Expected Behavior

1. Expected Behavior:

- The “Fix Guide” option for “NOT_PUBLISHED_AND_LAUNCHED” guide errors
- Activate/Unarchive guide option under Fix guide for “GUIDE_BRANCHED_GUIDE_ERROR” guide errors
  Both the options would redirect the user to Guide health user documentation.

2. Known Issue: Currently, the documentation redirection for NOT_PUBLISHED_AND_LAUNCHED and GUIDE_BRANCHED_GUIDE_ERROR scrolls to the respective guide errors on the documentation. There can be scenario where an update of the documentation might make the scroll not work and redirect to the top of Guide health documentation.

Available Actions

For each reported error, you have three options:

- **Fix Guide**

  Opens the relevant modal where the guide error has to be fixed along with the instructions using OGL Guides.

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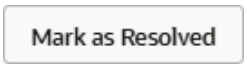
- **Mark as Resolved**

  Removes the error from the Guide Health error list. **Note**: If the error is not corrected, it will appear again after the next health check.)

- **Ignore**

  Hides the error from the Guide Health error list.

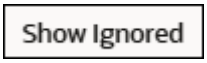
- **Don't Ignore**

  To display all ignored errors, select "Show Ignored" at the bottom of the Guide Health modal. For any ignored error, select Don't Ignore to unhide the error.

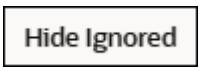
- **Details**

  Displays the Domain, URL, and Environment associated with the error.

To show/hide ignored errors in the error list, select one of the following options located at the bottom of the Guide Health modal:

- 

  Show Ignored: Toggles the Guide Health error list to show all ignored errors.

- 

  Hide Ignored: Toggles the Guide Health error list to hide all ignored errors.

Sorting and Filtering Errors

To sort errors by their severity, select the **Severity**

drop-down menu and select a sort order:

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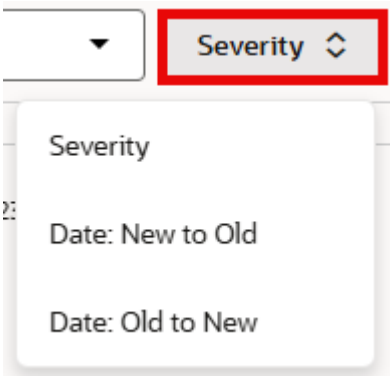


To filter errors by a specific keyword contained within the guide and/or error, select the **Search**

bar and enter a keyword.

Some examples of search terms include:

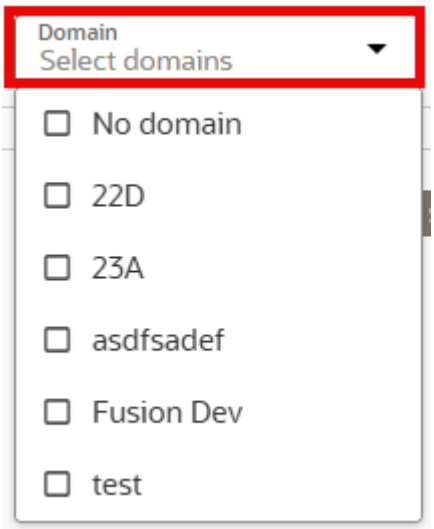
- Guide name
- apiName
- Status
- Issue description
- Recommendation

To filter errors by specific domains, select the **Domains**

(

)

drop-down menu and select one or more domains on from which to display errors.



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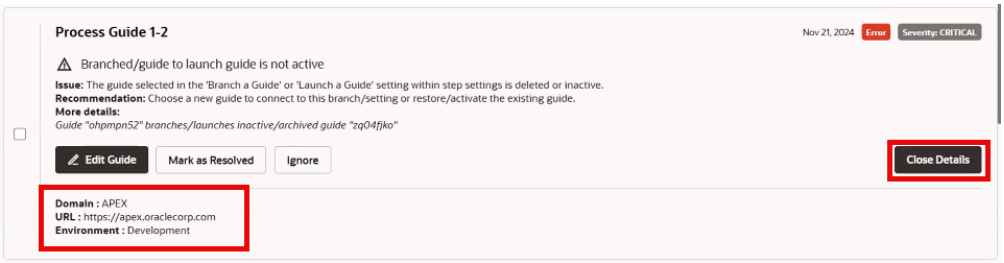
To show/hide the Domain, URL, and Environment associated with a specific error, select the **Details**

, button or **Close Details**

button below the error.



Potential Guide Health Issues

Below is a list of the potential issues that you might find in Guide Health:

Issue	Error	Description	Fix Guide Function
Sticky Smart Tip/ Beacon	ERROR_TYPE.STICKY_FLAG_NOT_EXPECTED	The Sticky Guide setting is selected in the Guide Settings. Because this is a smart tip or beacon, Sticky Guide is not necessary and can cause performance problems. **Recommendation**: Turn off the Sticky Guide in Guide Settings.	Navigates to guide settings and scrolls to the Sticky Guide option with a message tip.
Always Activation	ERROR_TYPE.WRONG_ACTIVATION	The Guide Activation conditions includes a "Display this Guide in Autoload Always" condition. These conditions can slow down Guided Learning because the content is checked on every page. **Recommendation**: Avoid "Display this Guide in Autoload Always" conditions by using more specific Guide Activation conditions, like limiting the guide to certain pages if possible.	Navigates to Activation conditions modal.
Not published and launched	ERROR_TYPE.NOT_PUBLISHED_AND_LAUNCHED	This content is not published, but it was launched somehow. Typically, another content can trigger launching, so you should search for dependencies. **Recommendation**: Search for the guide in the "Content" dashboard and Publish it or Search for the guide that is launching this guide and remove the dependency.	Redirects to User Guide documentation.

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Issue	Error	Description	Fix Guide Function
Launcher\'s guide to launch is not active	ERROR_TYPE.LAUNCHER_LAUNCH_GUIDE_ERROR	The selected guide in "Launch a guide" setting in guide settings is deleted/inactive. **Recommendation**: Select a new guide or recover/activate the existing guide.	Navigates to Launcher guide settings to the place where the guide being launched can be updated.
Launcher\'s guide to launch guide\'s start step is missing	ERROR_TYPE.LAUNCHER_LAUNCH_GUIDE_STEP_ERROR	The selected guide\'s start step is deleted in "Launch a guide" setting in guide settings. **Recommendation**: Select another guide or a new step to start for the exiting guide.	Navigates to Launcher guide settings to the place where the guide being launched can be updated.
Task list has one or more not active guide(s) included	ERROR_TYPE.TASKLIST_INCLUDED_GUIDE_ERROR	The deleted/deactivated guide(s) will not show up in the task list. **Recommendation**: Delete these guides from the task list or recover/activate the existing guides.	Navigates to task list editor where the relevant guide can be updated.
Task list has no active guide included	ERROR_TYPE.TASKLIST_NO_INCLUDED_GUIDE_ERROR	All of the task list\'s guides are deleted/ deactivated. **Recommendation**: Add active guides to the task list.	Navigates to task list editor where the relevant guide can be updated.
Branched/guide to launch guide is not active	ERROR_TYPE.GUIDE_BRANCHED_GUIDE_ERROR	The selected guide in "Branch a guide" or in "Launch a guide" setting in step settings is deleted/inactive. **Recommendation**: Select a new guide in the relevant step setting from the Full Editor (can be done by clicking Edit Guide in Fix Guide button) or The selected guide in the setting has to be unarchived/ activated. To activate the guide, search for the guide in "Content" dashboard and Activate it To unarchive the guide, search for the guide in "Archive" dashboard and recover it.	Navigates to OGL Full Editor with the relevant step or Redirects to User Guide documentation
Branched/guide to launch guide\'s start step is missing	ERROR_TYPE.GUIDE_BRANCHED_GUIDE_STEP_ERROR	The selected guide\'s start step is deleted in "Branch a guide" or in "Launch a guide" setting in step settings. **Recommendation**: Select another guide or a new step to start for the exiting guide.	Navigates to OGL Full Editor with the relevant step or Redirects to user guide documentation.
Some of the role conditions has undefined role(s)	ERROR_TYPE.UNMAPPED_ROLE_CONDITION	The Guide Activation conditions includes an Undefined Role condition. These conditions make guides not to be visible to users because of Undefined roles. **Recommendation**: Avoid adding Undefined Roles in activation conditions, or add Application roles to empty OGL role in Custom roles.	Navigates to activated condition to update the condition or Further navigates to Custom Roles modal.

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Issue	Error	Description	Fix Guide Function
Guide cannot be completed	ERROR_TYPE.GUIDE_CANNOT_ADVANCE	The guide includes a step where none of the tip's selectors are found, preventing the guide from advancing to the next step.	Navigates to OGL Full Editor to the step that has the issue.

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OGL AI Assist (Generative Artificial Intelligence)

OGL AI Assist integrates Oracle Cloud Infrastructure Generative Artificial Intelligence (OCI Generative AI) capabilities into the OGL console to help content developers reduce time, add efficiency, and increase personalization of guide contents at scale. With the OGL AI Assistant ('AI Assist'), content developers can reduce the time needed to create content by utilizing AI to generate recommendations for tip text using a variety of prompts.

In this first iteration of the OGL AI Assistant, content developers can generate recommendations for tip text within Message guides only. Users can generate multiple variations of content recommendations, then incorporate the AI generated content into the message tool tip and customize, as needed. In future releases, the OGL AI Assistant will be extended to other guide types and console functionality.

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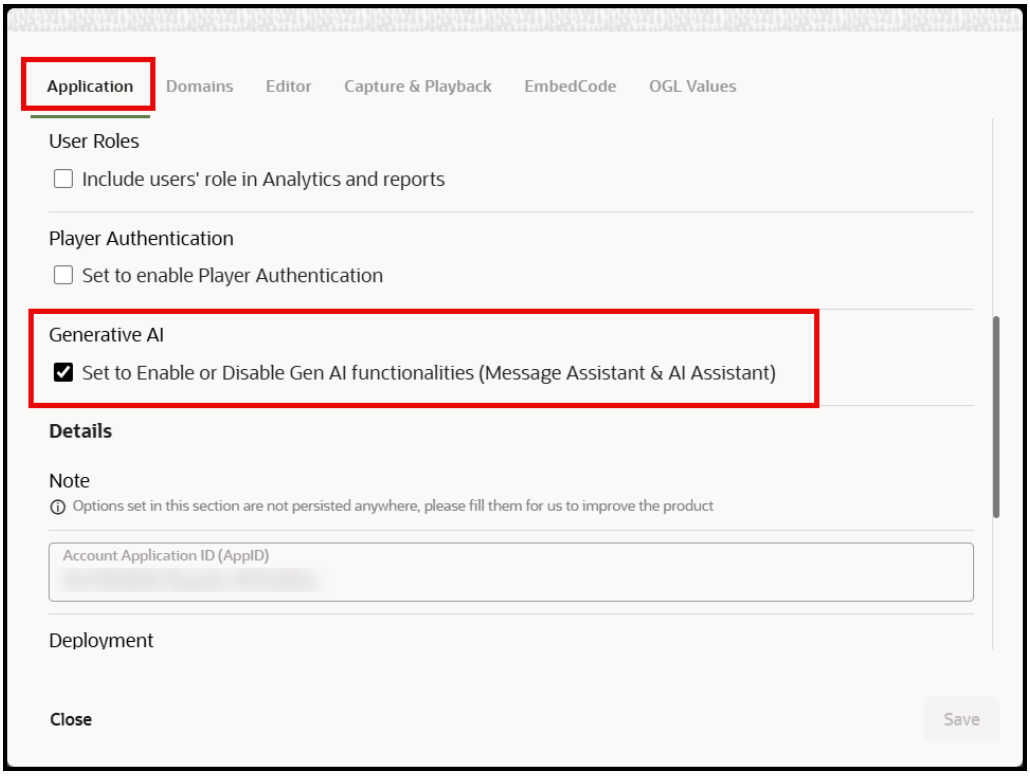
Note

Beginning in OGL 25D, console administrators with the **Owner > Change Application Settings** role/permission can enable or disable the OGL AI Assistant features (i.e., Message Assistant and Help Panel Assistant) from within the **Settings > Application** modal, as shown below. Please consult with your OGL Owner Administrator before enabling or disabling this feature, as needed.



Key considerations when using AI Assist:

1. Clients can start using AI Assist when looking for text content recommendations in their OGL tooltips ONLY for Messages. They can then add this content into their tooltips and amend as per usual (within the full editor).
   For example: “Write a service maintenance message for July 4th ”, or “Write a new release notes message”, or “Write a policy update notification.”
2. AI Assist captures language, tone, and text length.
3. Can regenerate the prompt if you're not satisfied with a given response.
4. With any AI prompt, it's best to be specific and to the point when writing instructions.
5. The message that is created uses the last generated response from AI (not earlier ones) – See below.

How to use the OGL AI Assistant for a Message guide:

1. From the My Content page, select the Create button to create a new content item.

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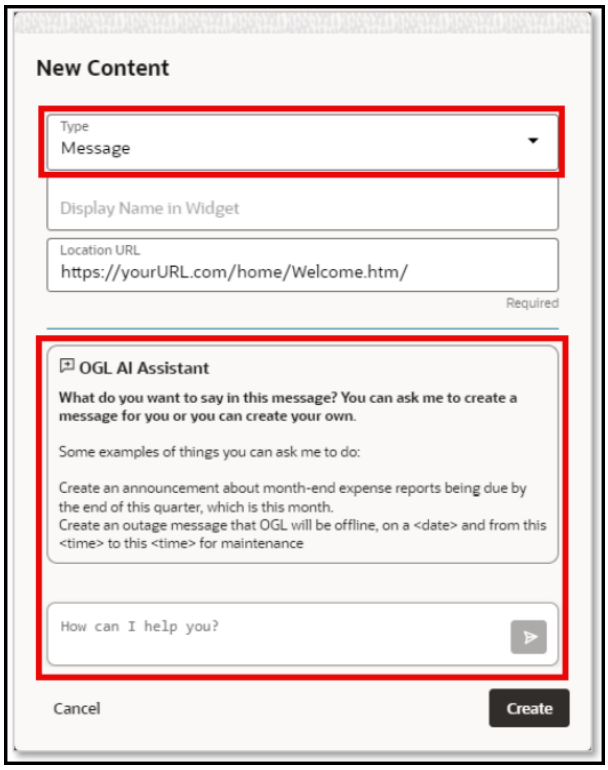
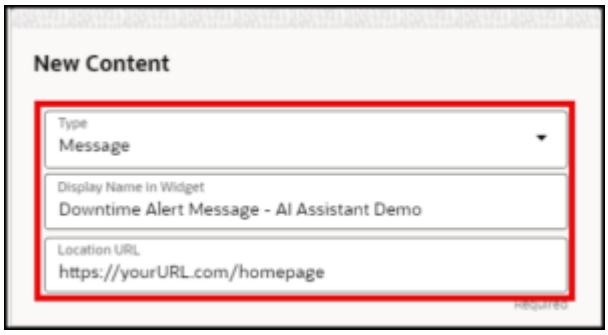
2. In the New Content modal, select Message from the Type dropdown menu. This will automatically enable the OGL AI Assistant as shown below.



3. Enter a guide name for your message in the Display Name in Widget field and a Location URL, as required.



4. In How can I help you? field, enter a text prompt for what you would like the OGL AI Assistant to generate: (For example, “Create a system downtime alert message for this Sunday from 5:00AM - 7:00AM”) Select the Send button (or press Enter) to generate a response.

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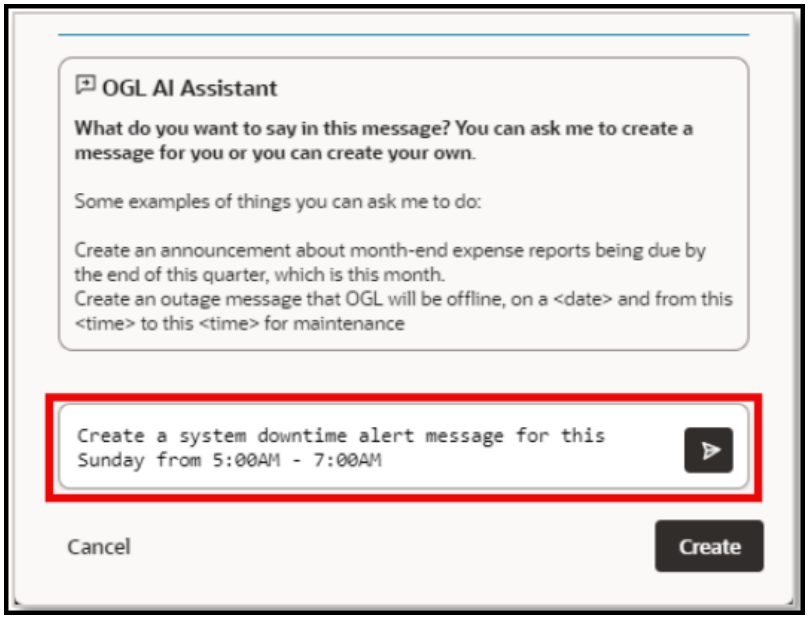
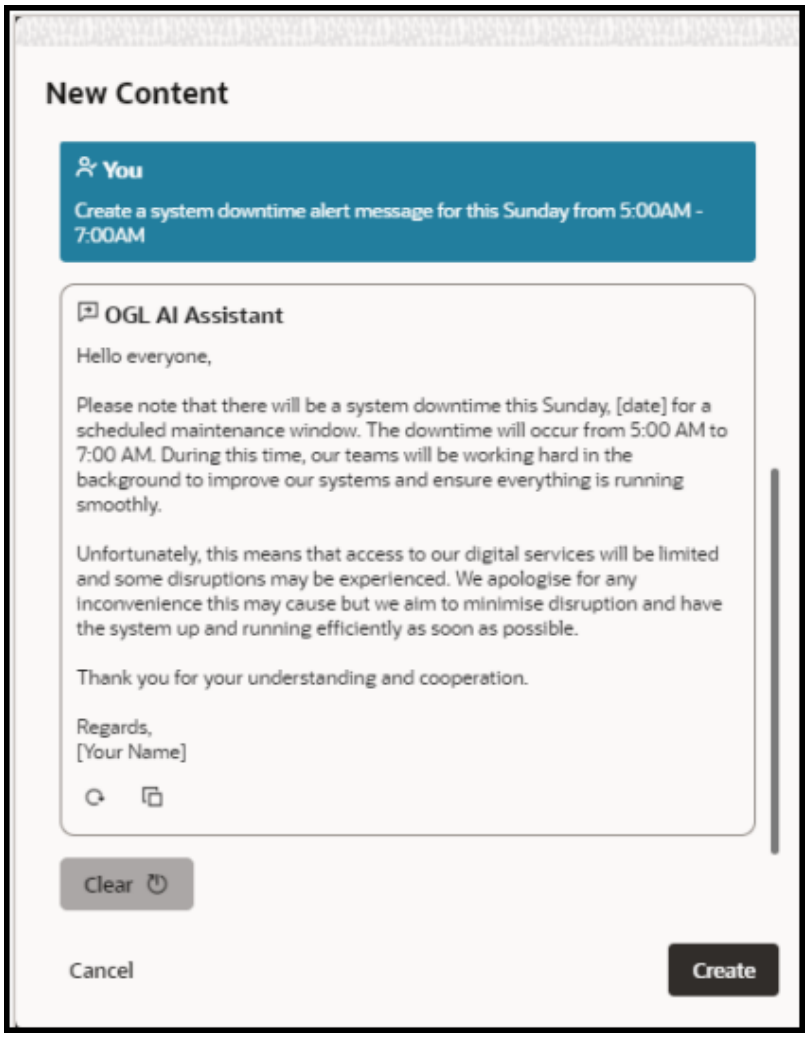


5. The OGL AI Assistant responds by generating a recommendation for the message text based on your prompt.



Below are the different response buttons that allow you to:

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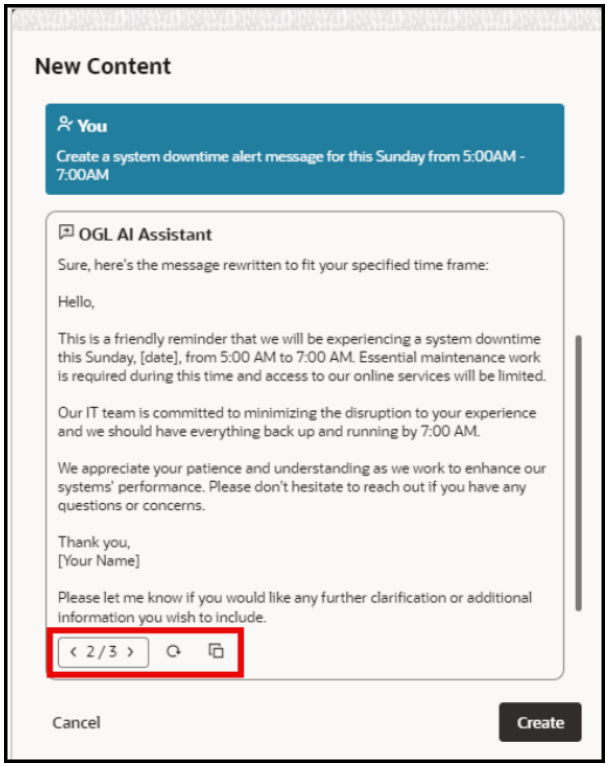
• **Regenerate** a new response.

• **Copy** the response text to your clipboard.

• **Clear** the response and start over with a new prompt.

• **Create** to create a new Message guide using the response as the tip text.

6. If you're not satisfied with the recommended response, you can ask the AI Assistant to generate another response by selecting the **Regenerate** button. Each time you regenerate a new response, you'll be able to toggle between the responses by using the **Previous** and **Next Response** buttons.



Note

Selecting the Create button at the bottom of the modal will automatically paste the last generated text response. Even if you navigate to a previous response, such as < 2/3 >, selecting Create will paste the text from < 3/3 > into a new Message guide.

To copy the text from a previous response, use the Copy button to copy it to your clipboard and paste it into the tooltip in the guide editor or into a text file for later use.

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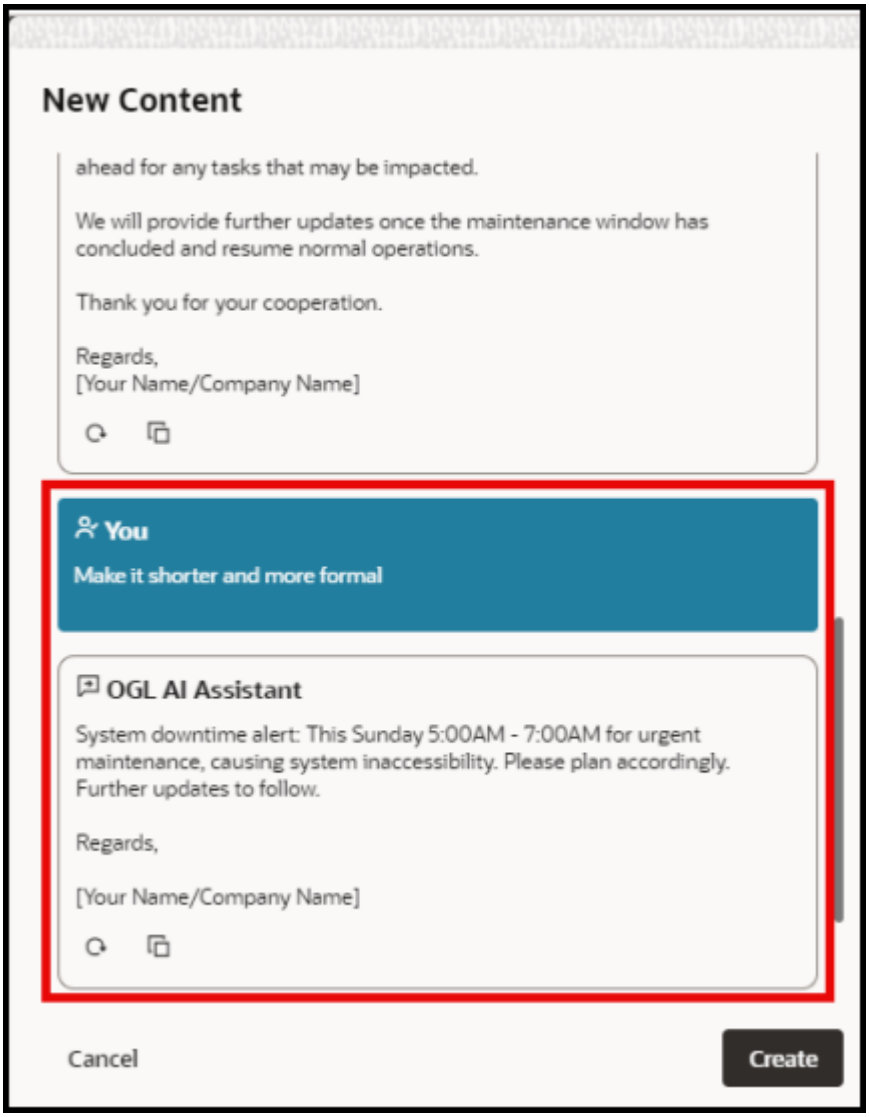
Tips for using the OGL AI Assistant

- **Refine your prompts**
  - If the AI Assistant response is too long, you can refine it by adding additional prompts within in the same session. For example, “Make it shorter and more formal.”



- **Types of prompting questions**
  - You can prompt the AI Assistant by adding in verbiage around language translations (e.g., “Write this message in Japanese”), tone (e.g., Corporate or Casual), and character/word length (e.g., “in two sentences” or “Write a brief message…”)
  - You can provide the context of the audience you’re writing for (e.g. For HR Managers)
- **Prompting Guidelines**
  - Best guideline for the prompting is to be specific with your prompt in what you want, how it should be presented and who it is for. You can use Do and Don’t commands.
  - Some articles that may help you include: https://huit.harvard.edu/news/ai-prompts & https://news.microsoft.com/source/features/ai/the-art-of-the-prompt-how-to-get-the-best-outof-generative-ai/

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- **Guidelines for invoking prompt into message**
  - Note 1 – when refreshing your AI prompt the last copy of the prompt will be copied into the editor experience as designed. To use an earlier version, please use the copy button and instead paste this inside the editor.
  - Note 2 – At this stage in time, AI Assist can only use this for generating message text. At a future state we will be rolling out the capability to build guides and summarizing analytics reports

Known Issues/Expected Behavior for OGL AI Assistant:

- In this current release, the scope of functionality for the OGL AI Assistant is intended to generate recommendations for tip text in a Message guide only. This feature will be further expanded to other guide types and other application functionality in future releases.
- **Expected behavior** – Auto-Generated page condition will be created upon Save & Exit. Condition: Display this guide in Autoload When Page has URL Matching {Location URL, whether manually entered or default Location URL}
- **Expected behavior** - Selecting the Create button at the bottom of the modal will automatically paste the last generated text response. Even if you navigate to a previous response, such as < 2/3 >, selecting Create will paste the text from < 3/3 > into a new Message guide. To copy the text from a previous response, navigate to the response you wish to copy, select the Copy button to copy it to your clipboard, and paste it into the tooltip in the guide editor or into a text file for later use.

Data Handling in Generative AI

Learn how OCI Generative AI handles user data.

- **Does OCI Generative AI retain customer-provided training data used to fine-tune a custom model?**
  No. The customer stores and manages their training data in their own customer tenancy (commonly inside an OCI Object Storage bucket). OCI Generative AI's fine-tuning job uses this training data to train a custom model for customer. OCI Generative AI doesn't retain this training data beyond the duration of this training job. This training data is solely used for building a custom model for this customer. The custom model is also a resource that's managed by the customer. This training data is not used to improve the general use cases for OCI Generative AI.
- **Does OCI Generative AI retain customer-provided prompts and inputs used for inferencing, on the large language models (LLMs)?**
  No, OCI Generative AI doesn't retain customer inputs. A user's input on an inference call is sent to the LLM and a response is generated by the LLM that's returned to the user. Both input and output are not stored inside OCI Generative AI.
- **Does OCI Generative AI share prompts and responses, fine-tuning training data, or fine-tuned custom models with third-party model providers such as Cohere or Meta?**
  No.
- **Is the training data encrypted?**
  The data is encrypted both at rest and in transit. The training data is deleted from the fine-tuning cluster as soon as the training job is completed.

  Training data for fine-tuning a model is always double encrypted, by default, by Oracle-managed AES-256 encryption and optionally by customer-managed private keys through OCI Vault service. Customers can delete the data at any time. Oracle encrypts all the data in motion with TLS 1.2.

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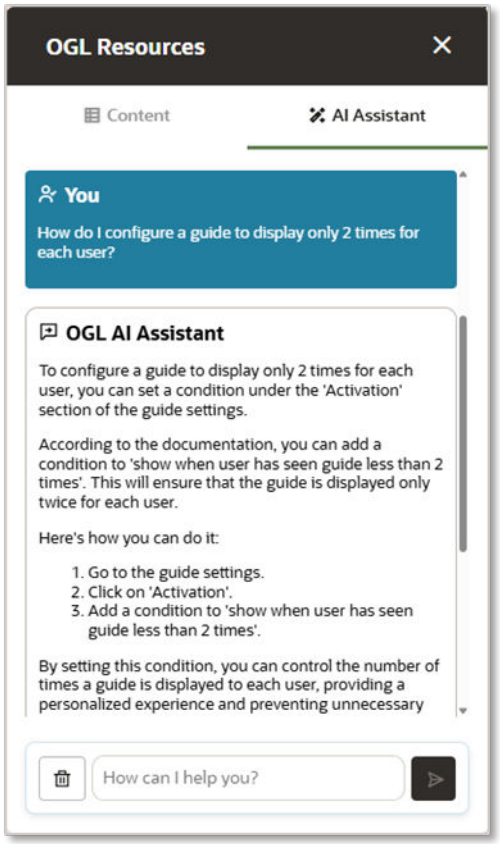
AI Assistant in the Console (Help Panel Assistant)

In addition to the AI Assistant in the message editor, OGL also offers an AI Assistant feature in the console Help Panel. This helpful AI companion can help OGL content developers and administrators with questions related to OGL. Questions can range from onboarding and introductory information about creating guides to answering questions about activation conditions. The OGL console AI Assistant employs Oracle's Gen AI agent, which is equipped with a self-managed Large Language Model (LLM) and Retrieval-Augmented Generation (RAG) capabilities to improve the accuracy and relevance of responses.

The console AI Assistant retrieves specific information from a custom knowledge base, which consists of the OGL User Guide, Knowledge Articles, Release Notes, OGL Support FAQs, and other Oracle resources. This AI feature adds efficiency and convenience for OGL console users to easily find answers to questions about OGL without needing to spend time researching a multitude of documentation resources.



Potential use cases:

- AI Assistant serves as a Knowledge Base for any OGL related questions
- Provide troubleshooting tips
- Showcase new features in OGL
- Provides tips on improving content management
- Answer questions related to onboarding
- Search quarterly Release Notes

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- OGL support FAQs

> **Note**
>
> Console administrators with the **Owner > Change Application Settings** role/ permission can enable or disable the OGL AI Assistant features (i.e., Message Assistant and Help Panel Assistant) from within the **Settings > Application** modal, as shown below. Please consult with your OGL Owner Administrator before enabling or disabling this feature, as needed.

Examples of prompts that you can enter in the AI Assist feature:

- What is the URL Matching condition?
- I want a guide to be shown on two different pages with different URLs. How should I set up the conditions?
- What is a Session Variable Condition?
- What is Cookie?
- What is Cloud Configuration?
- What should you do if you see "No permission to edit cloud configuration"?
- Show me the list of redwood base guides available on recruiting.
- The Widget Fails to Load on the Application Due to the CSP Error.
- Do you have guides for employees to do self-evaluation of their performance document?

Known Issues/Expected Behavior

- After enabling the AI Assistant within application settings (whether On or Off), user must refresh page for changes to take effect.
- Page refresh in the same session causes existing AI Assistant conversations to get refreshed/erased as well.
- OGL AI Assistant does not store any personally identifying information, prompt history, or other user data.
- OGL AI Assistant uses a pre-trained LLM with RAG capabilities that retrieves information from a predefined knowledge base to prevent false, inaccurate, or irrelevant response and does not retain prompts/queries for AI training purposes.

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OGL Analytics & Reports

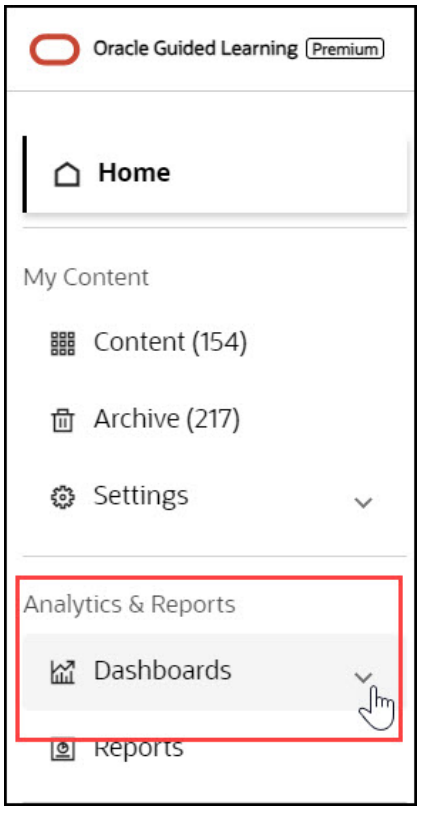
Users who have been granted the **View Analytics** viewer permission can access the **Analytics & Reports** tab in the OGL Console.

> **Note**
>
> OGL analytics data can take up to 24 hours to process before it is presented in the Analytics Dashboards and Reports. Guide data collected today will not appear in analytics until the following day.

Dashboards

Accessing the Dashboards

1. On the OGL Console homepage, go to the left navigation panel.
   You can see the **Analytics & Reports** tab on the navigation panel.
2. Select the **Dashboards** dropdown menu.



All the Analytics **Dashboards** are now displayed under the dropdown menu.

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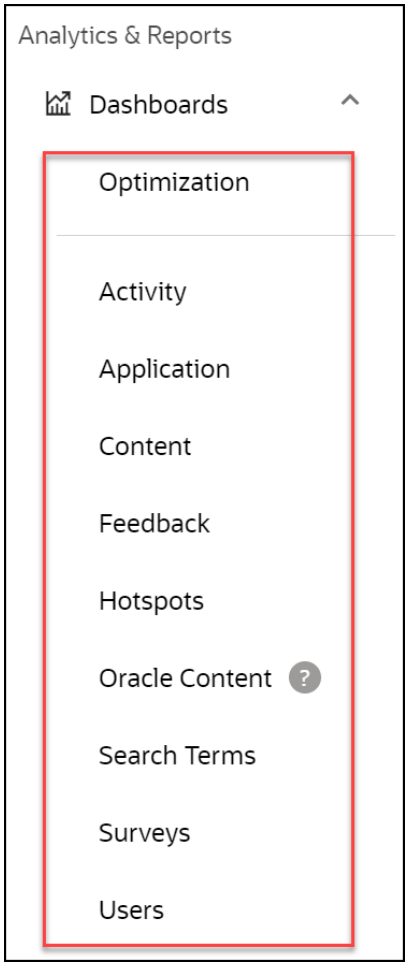

Overview of Analytics Dashboards

The Analytics Dashboards provide data on the consumption of OGL content for a specified account and for a designated time frame. There are various analytics dashboards available, each providing different analyses and visualizations of consumption data and host application usage.

Example of the **Optimization** dashboard:

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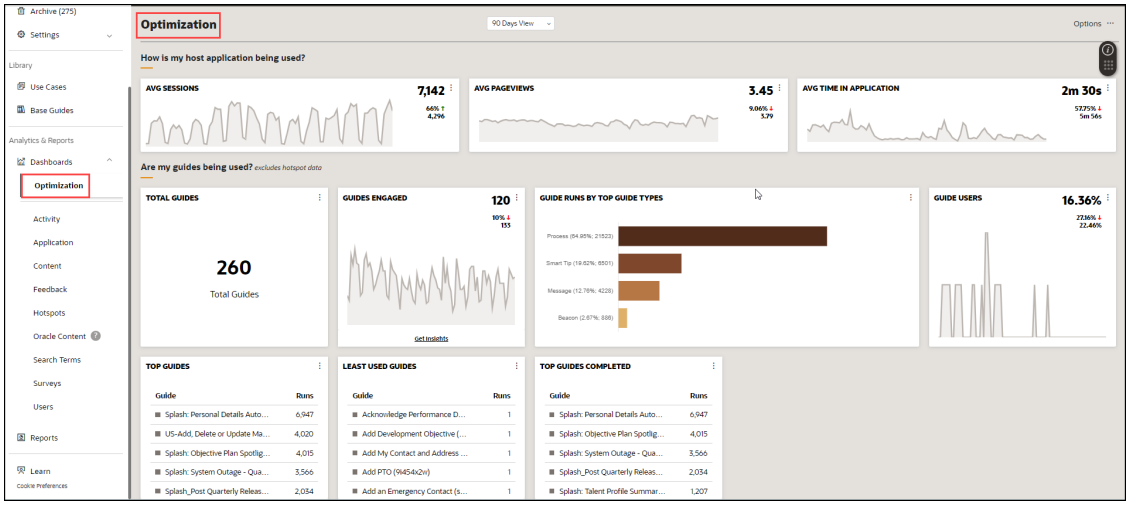

With Oracle Guided Learning Analytics, adminsitrators can easily filter and generate reports on OGL metric data, allowing you to monitor the usage and consumption of OGL content. OGL Analytics provides 9 standard dashboards with customizable filtering options and the ability to download data, where applicable. Each of the analytics dashboards are covered in more detail in this document.

- **Optimization Dashboard**: Highlights key daily/weekly measures organized by content health and the target application traffic.
- **Activity Dashboard**: Guide activity and the consumption of OGL content.
- **Application Dashboard**: View traffic on specific pages. An expanded set of filters is now provided along with three new Dashboards covering User, Content, and Application, in addition to the Activity Dashboard.
- **Content Dashboard**: How many of each type of guide are available in the Console.
- **Feedback Dashboard**: View and analyze user feedback on OGL content items.
- **Hotspots**: View analytics on Launchers and Hotspots.
- **Oracle Content Dashboard**: Adds a new dashboard to the OGL Analytics and Reports capabilities to provide guide activity data of Oracle Content.
- **Search Terms Dashboard**: View frequently searched terms and analyze ease of access to OGL content items.
- **Surveys Dashboard:** The Reports dashboard lets OGL administrators see survey results and download a report that includes end-user responses.
- **Users Dashboard**: Detail from a user perspective on Oracle Guided Learning activity.

Reports

The Analytics **Reports** lets OGL administrators download a customized report that includes end-user responses and data captured by Surveys.

You can access the **Reports** from the main navigation menu.

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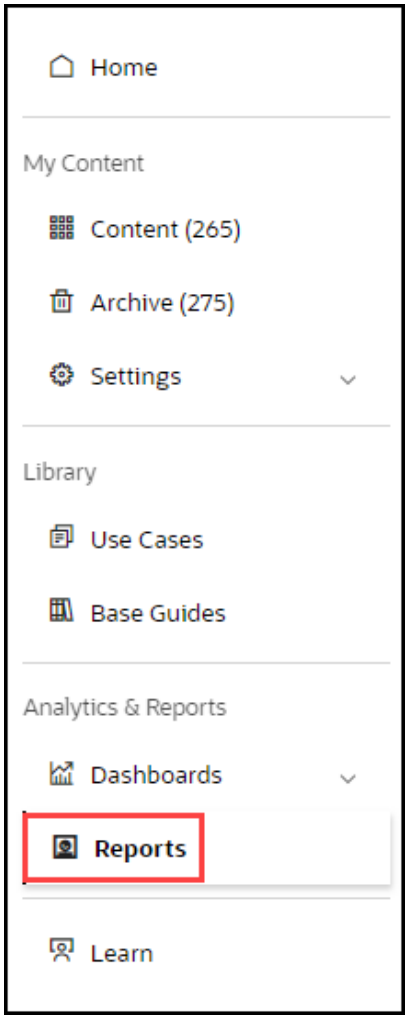
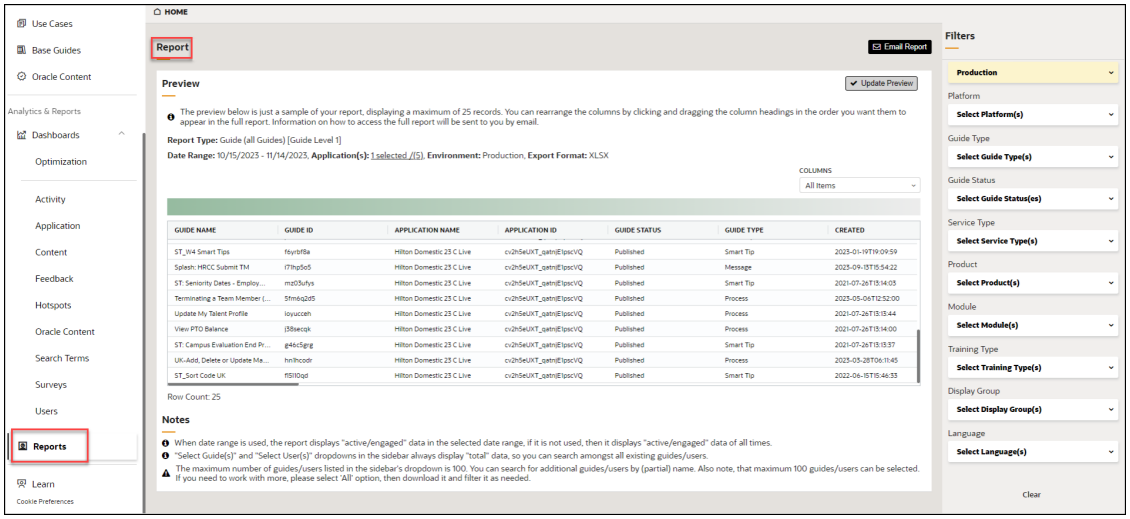


Below is an example of the **Reports** interface.



Analytics Email Report

To enhance the clarity and relevance of the Analytics Email Report, the following improvements were made:

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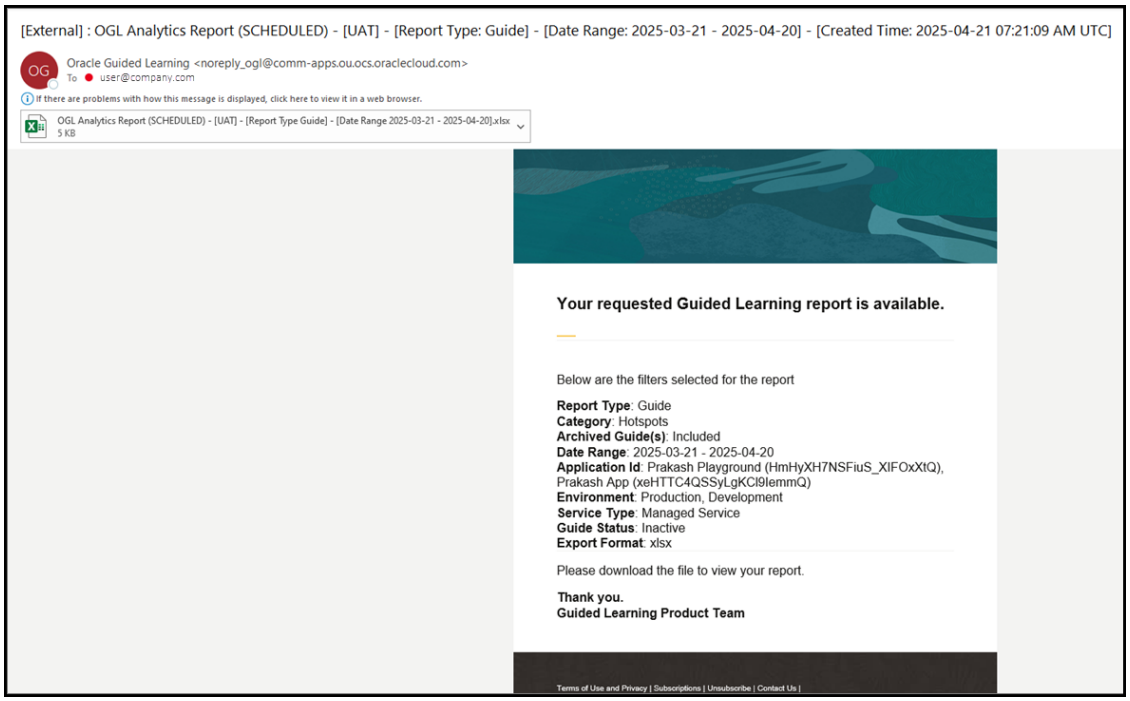
- Refined the subject line to better reflect the report content.
- Added analytics filter details within the email body to provide clear context to recipients.
- Set the report file name to match the subject line for consistency.
- To resolve a data discrepancy between the manual and scheduled email reports, the database pull time for the scheduled report has been moved from 7:00 UTC to 20:00 UTC. This change allows sufficient time for the data to be updated in the analytics report.



Navigating Through the Analytics Dashboards

To navigate through the various Analytics Dashboards, you can use the Navigation Panel on the left. Simply go to the **Analytics & Reports** tab and select the Dashboard you want to view.

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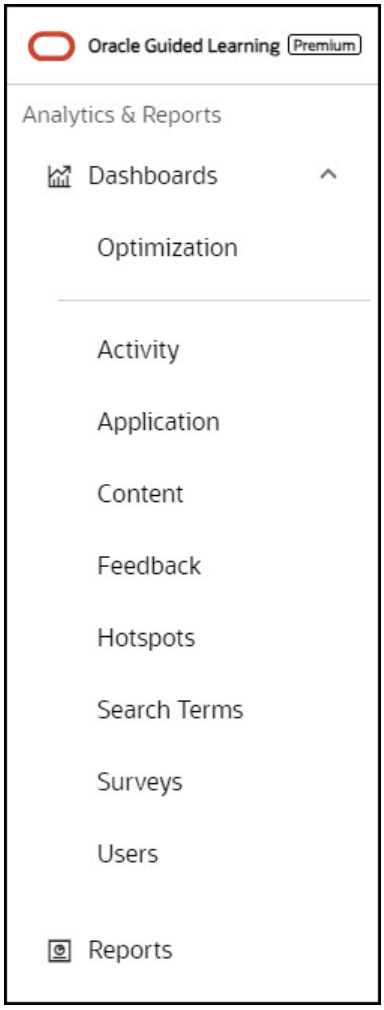

Optimization Dashboard

The Optimization dashboard is designed to provide a comprehensive analytics overview of recent host application activity and guide utilization over a fixed timeframe. The dashboard is comprised of data tiles called "widgets" that display analyses of various metrics, such as, top user roles, events based on activation conditions, feedback trends, and highlights any potential guide issues. The Optimization dashboard also provides second-level drill-down tables that allow you to get insights about guides with just one click, enabling you to quickly filter selected guides for efficient guide management.

Accessing the Optimization Dashboard

1. On the left Navigation Panel, select **Dashboards > Optimization**.The Optimization dashboard is now displayed.

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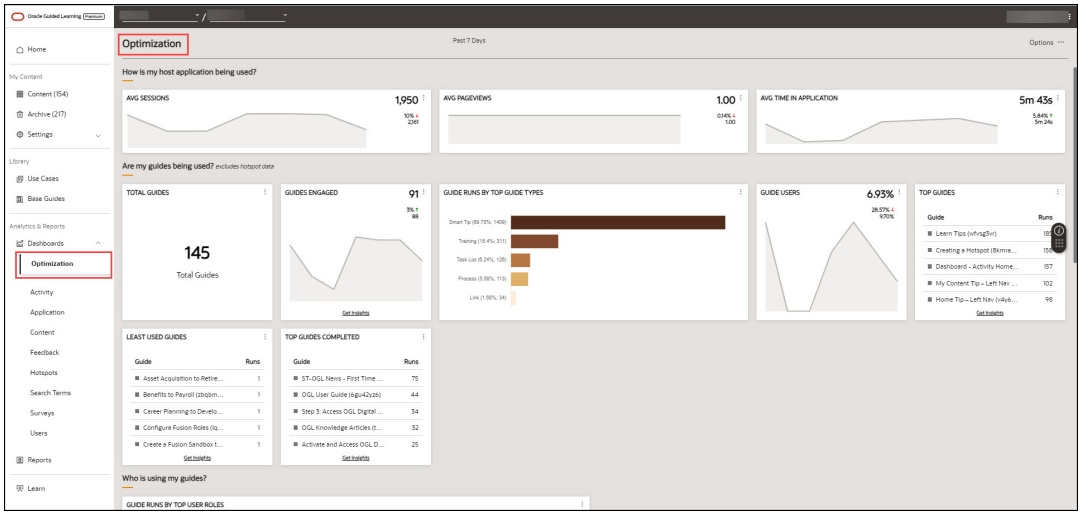
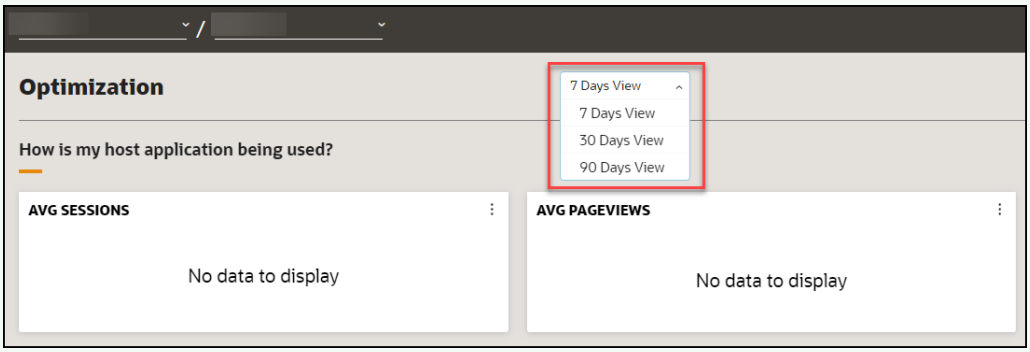


Tip

By default, the Optimization dashboard shows analytics data for the last **7 days**. Beginning in release 23C, you will also have the option to select timeframes of 30 or 90 days for an extended view.

To view the Optimization data for an extended period, choose the filter at the top of the page and select the desired timeframe (Valid from release 23C onwards).



The Optimization dashboard offers insights on important daily and weekly metrics sorted by content health and target application traffic. It identifies areas that need improvement and provides detailed information on their health status.

What You Can See on the Optimization Dashboard

How is my host application being used?

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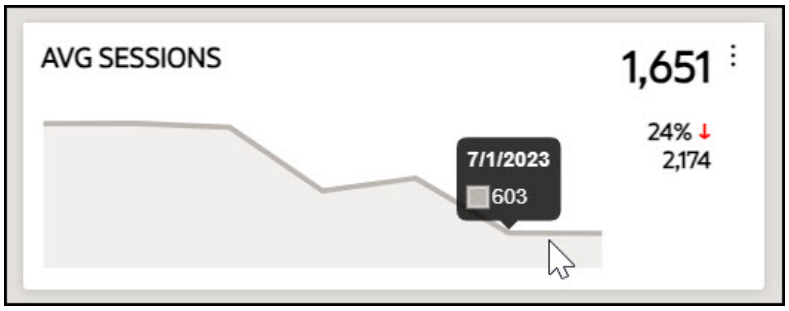
In this section, you will find graphs that display **Average Sessions**, **Average Page Views**, and **Average Time In Application**. These graphs provide insight into how users interact with your host application.

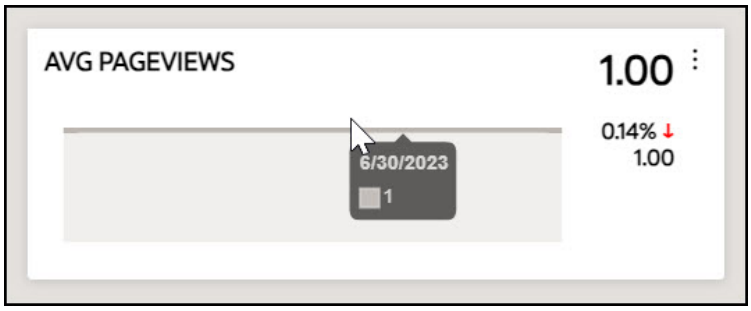
Average Sessions

A session is defined as the continuous period of user activity within a chosen host application, such as HCM or ERP. The **Average Session** is calculated by taking the average of all the sessions recorded within the past chosen interval.



Average Page Views

The **Average Pageview** is the average number of times a unique page is visited in the selected host application within the past chosen interval.



Average Time In Application

The **Average Time in Application** is the average amount of time that users have spent in the selected host application during the past chosen interval.

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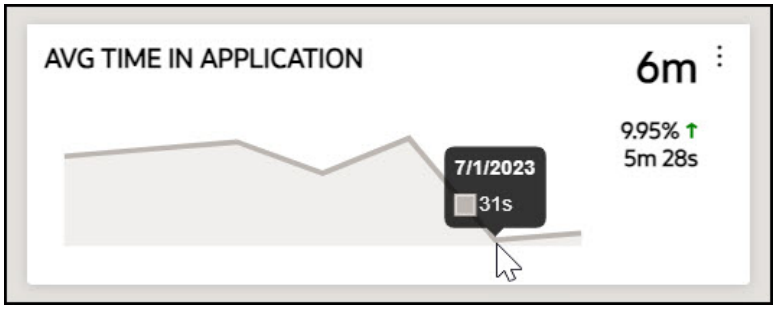
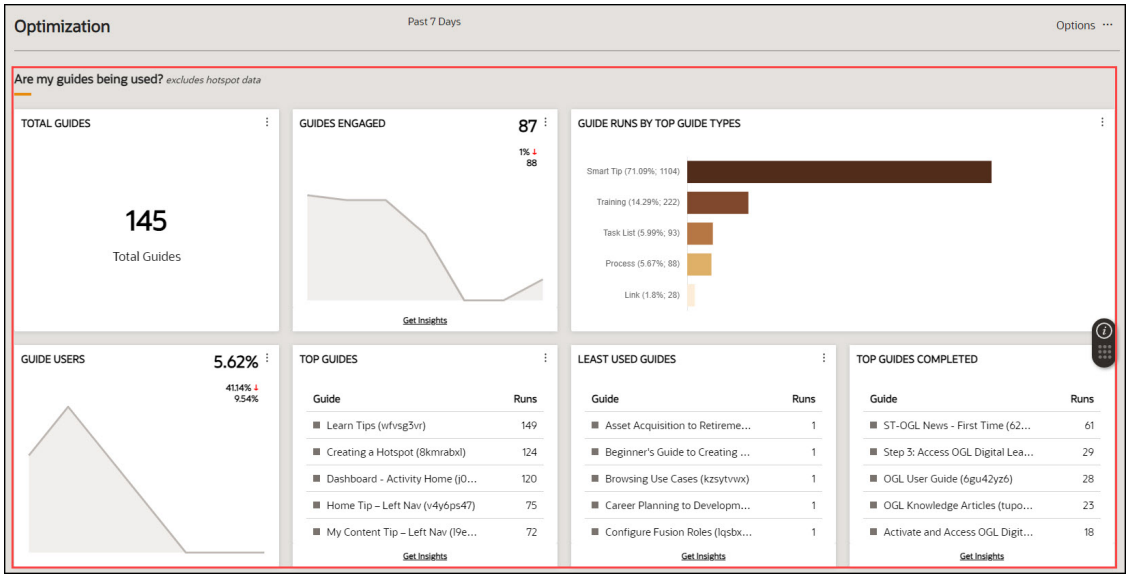


Are my guides being used?



In this section, you will find graphs, charts, and statistics that display **Total Guides**, **Guides Engaged**, **Guide Runs by Top Guide Types**, **Guide Users**, **Top Guides**, **Least Used Guides**, and **Top Guides Completed**. These data provide insight into how users engage with your OGL guides.

> **Note**
>
> The information gathered by hotspots is not used to generate insights in this section.

Total Guides

The total number of guides in an account, including those in draft, published, and inactive status.

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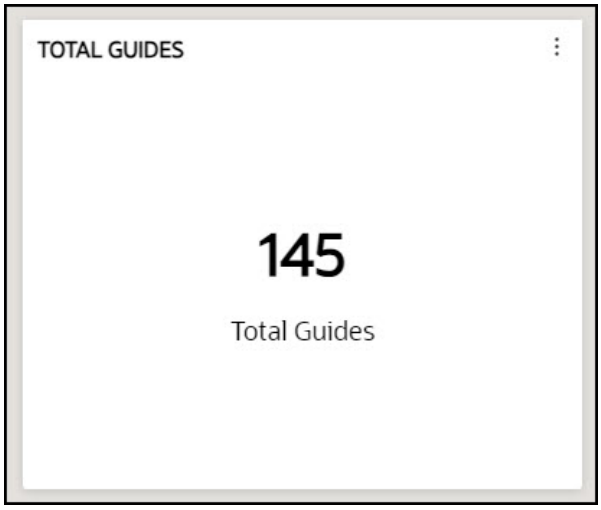
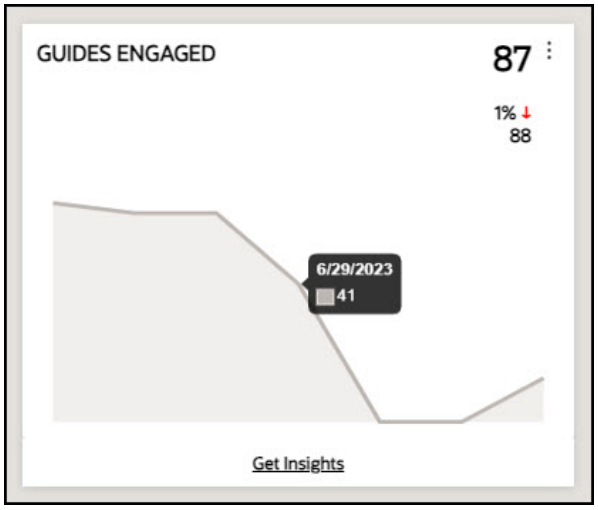
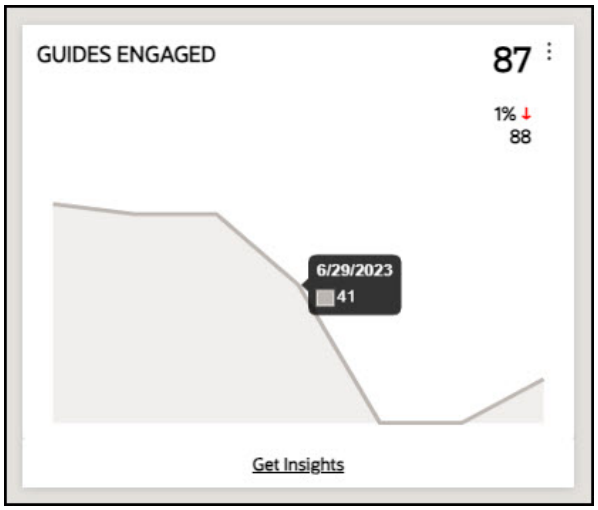


Guides Engaged

This refers to the number of guides the user has interacted with within the past chosen interval.





You can get detailed insights by selecting **Get Insights**.

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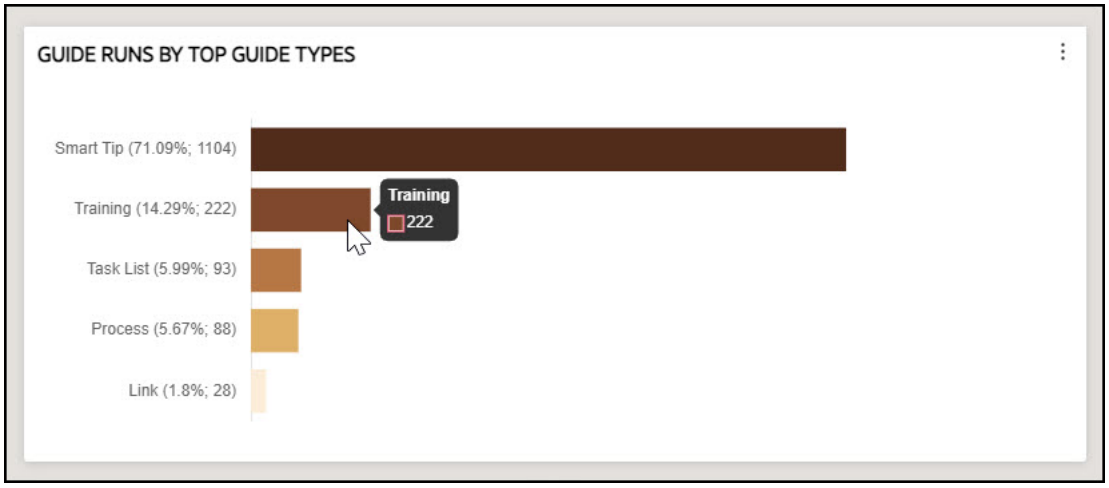
Select here to learn more about detailed insights.

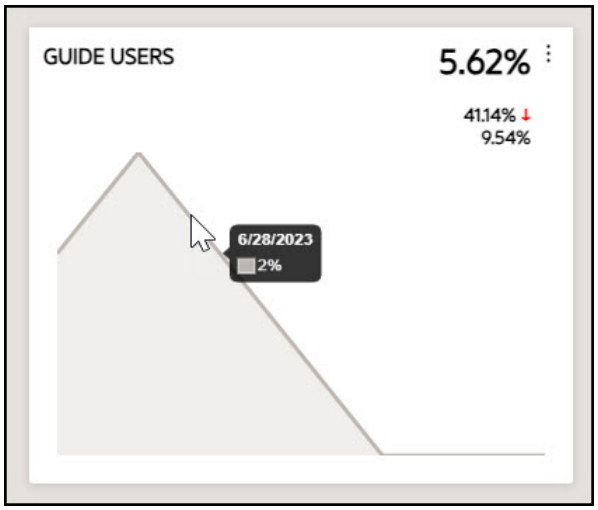
Guide Runs By Top Guide Types

This is a graphical representation of the top five most used guide types in the order of their usage. The chart shows the total number of times each guide type has been run and its percentage in relation to the total number of guides run.



Guide Users

Guide Users refers to the percentage of host application users that engaged a guide within the chosen interval, and it displays the latest trends.



Top Guides

The **Top Guides** displays the five most used guides, listed in order of their usage.

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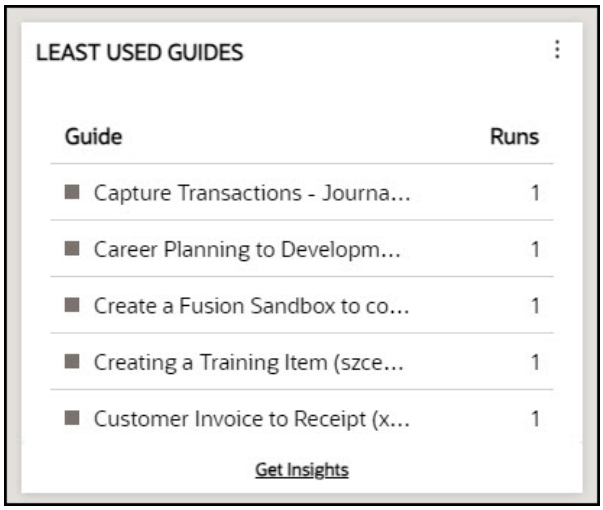
You can get detailed insights by selecting **Get Insights**.

Select here to learn more about detailed insights.

Least Used Guides

The **Least Used Guides** displays five least used guides, listed in order of their usage.



You can get detailed insights by selecting **Get Insights**.

Select here to learn more about detailed insights.

Top Guides Completed

The **Top Guides Completed** shows the five most used guides that have been successfully completed till the final step.

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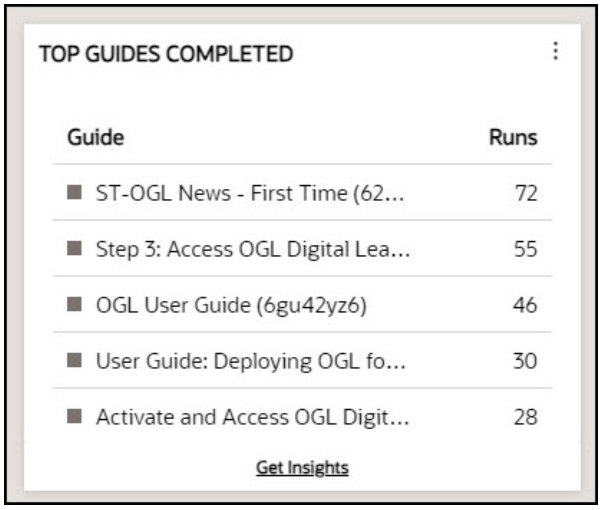
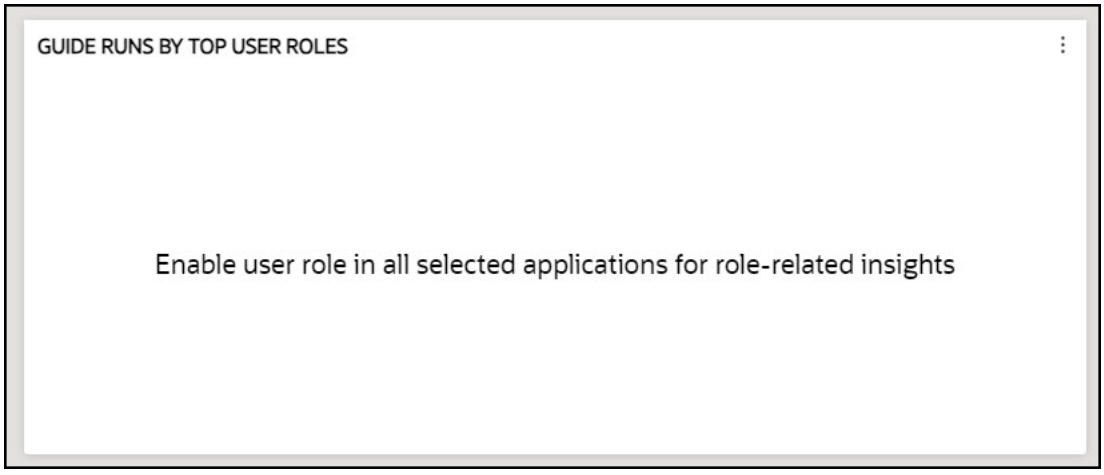


Who is using my guides?

Guide Runs by Top User Roles

This feature shows the insights related to the user roles, including the percentage of runs completed by each role and the total number of runs completed by each specific role.

> **Important**
>
> The user roles must be enabled in all the selected applications for insights related to roles.



Do I have any upcoming guide management events?

This section displays insights related to guide management events.

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Guides Launching

The **Guides Launching** shows the number of guides coming up soon based on their "display date start" conditions.

Guides Expiring

The **Guides Expiring** shows the number of guides expiring soon based on their "display date end" conditions.

Guides With Activation

The **Guides with Activation** shows the number of guides with at least one activation condition (e.g., simple, advanced, time).

Select the **Guides with Activation** link to display a filterable table of guides along with their associated activation conditions.

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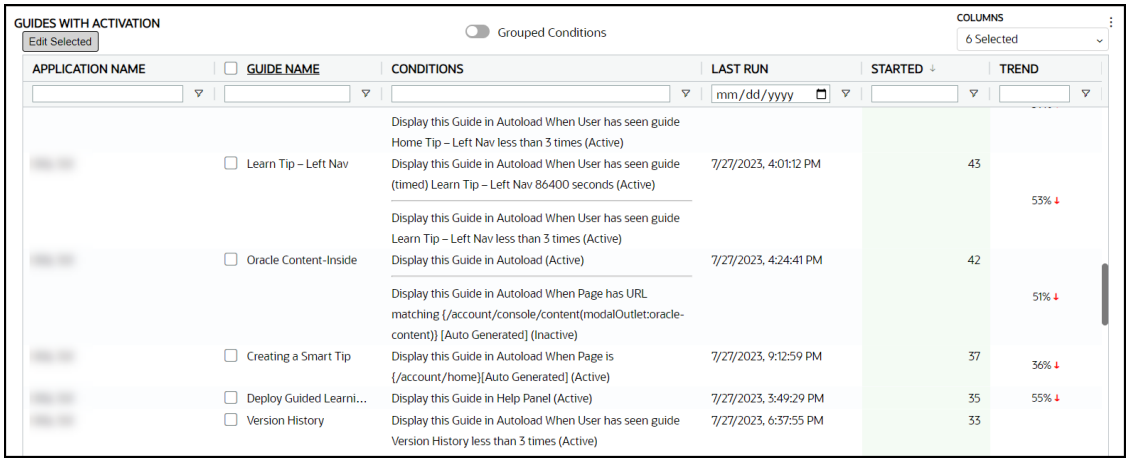


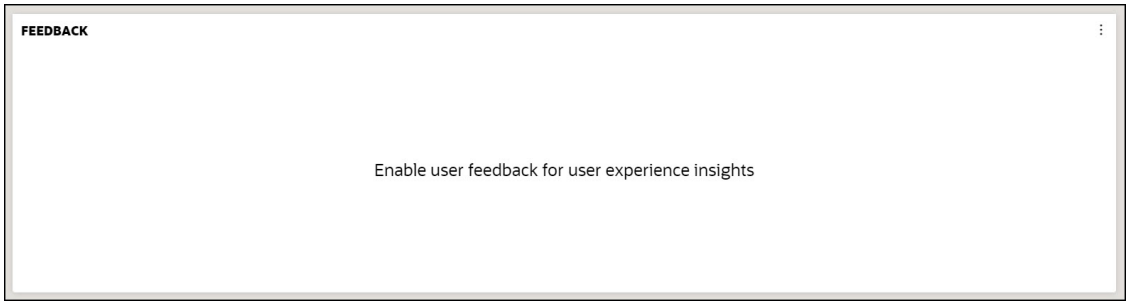
Are my guides helpful?

This section displays insights related to user experience.

Feedback

The **Feedback** tab displays the user feedback for user experience insights.

> **Note**
>
> User feedback must be enabled in all the selected applications for insights related to user experience.



Are there any potential problems with my guides?

This section displays the potential problems with the guides if found any.

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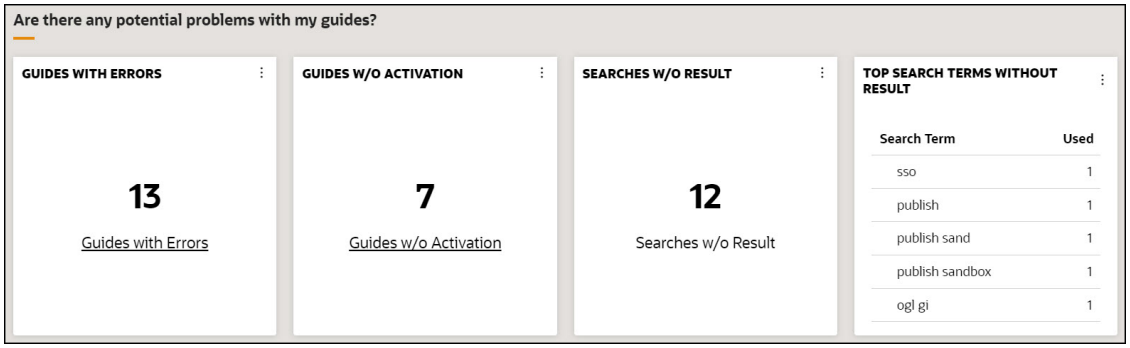
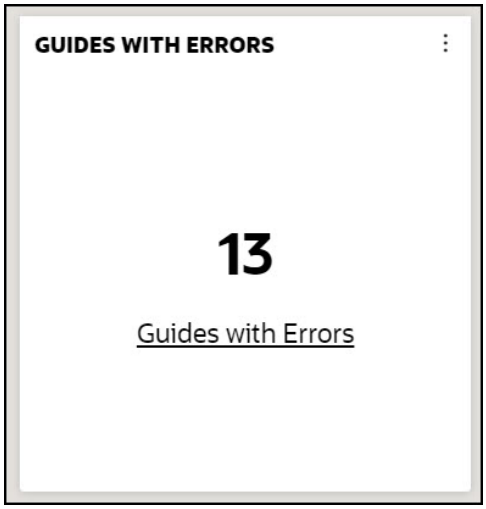


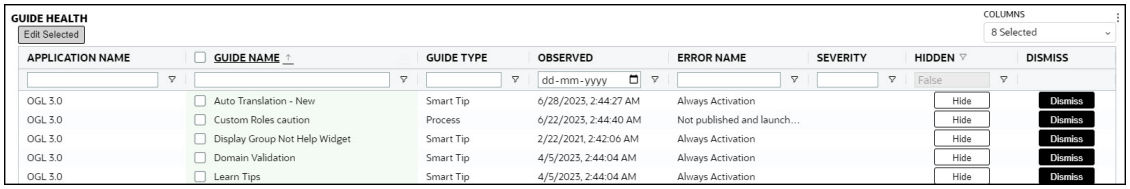
Guides with Errors

The **Guides with Errors** tab shows the total count of guides that have experienced errors, which OGL has identified.



Select **Guides with Errors** to see the detailed **Guide Health**.

Afterward, you can choose particular guides and hide or dismiss the error report.



Example:

If you activate the **Sticky Guide** function for a Smart-Tip, the border around the content tile will turn red, indicating that the guide's health has been compromised. This will be considered an error, and the guide will be included in the tally of **Guides with Errors**.

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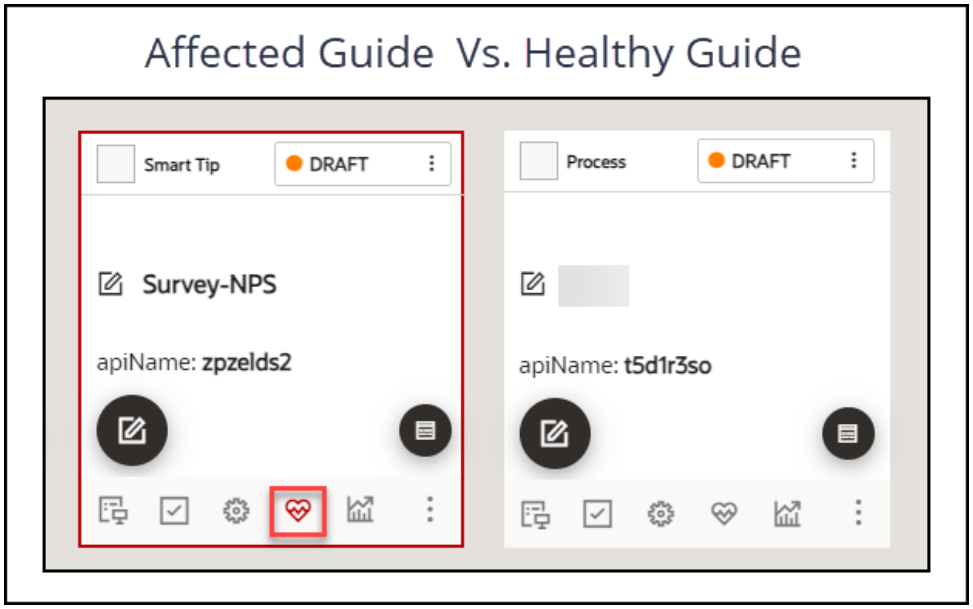
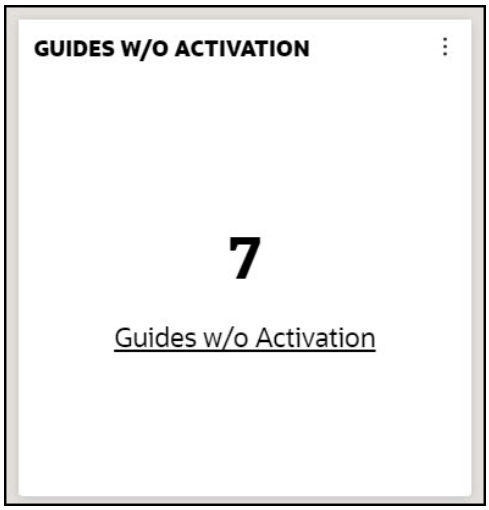


Guides Without Activation

The **Guides Without Activation** tab shows the total number of guides that currently exist without any activation conditions.



Select **Guides Without Activation** to see the detailed list of guides without activation conditions.

Searches Without Result

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The **Searches Without Result** tab shows how many times users' searches did not yield any results.

Top Search Terms Without Result

The **Top Search Terms Without Results** tab displays the most commonly searched terms by users that did not produce any results.

Exporting the Detailed Analytics Report

You can easily export a comprehensive analytics report in CSV and XLSX formats with just one click.

1. Navigate to the desired tab to export its data.
2. Select the ellipsis icon on the top-right corner of the tab.

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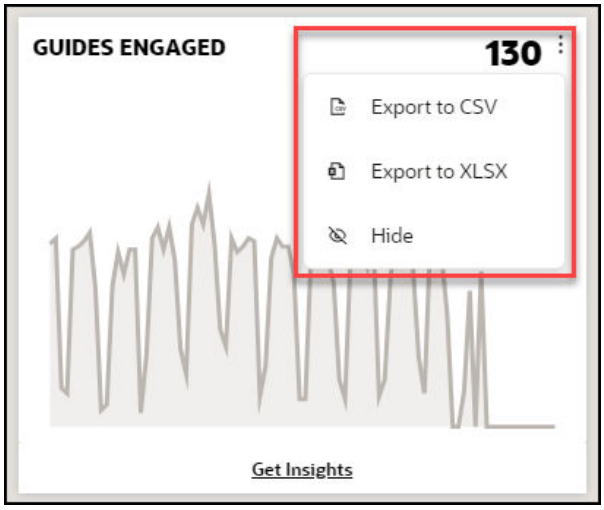

3. Choose the output format for the detailed report that you wish to export.The detailed report is now downloaded.

	A	B
1	**Guides Engaged**	
2		
3		
4	**Date**	**# of Guides Engaged**
5	2023-04-20T00:00:00.000Z	66
6	2023-04-21T00:00:00.000Z	68
7	2023-04-22T00:00:00.000Z	14
8	2023-04-23T00:00:00.000Z	12
9	2023-04-24T00:00:00.000Z	64
10	2023-04-25T00:00:00.000Z	65
11	2023-04-26T00:00:00.000Z	67
12	2023-04-27T00:00:00.000Z	70
13	2023-04-28T00:00:00.000Z	50
14	2023-04-29T00:00:00.000Z	6
15	2023-04-30T00:00:00.000Z	8
16	2023-05-01T00:00:00.000Z	51
17	2023-05-02T00:00:00.000Z	63
18	2023-05-03T00:00:00.000Z	55
19	2023-05-04T00:00:00.000Z	64
20	2023-05-05T00:00:00.000Z	64

Guides Engaged | Details

Customizing the Optimization Dashboard

You can customize the Optimization dashboard by choosing which of the dashboard widgets you want to be displayed.

1. Select **Options** in the top-right of the page to open the **Show/Hide Widgets** panel.

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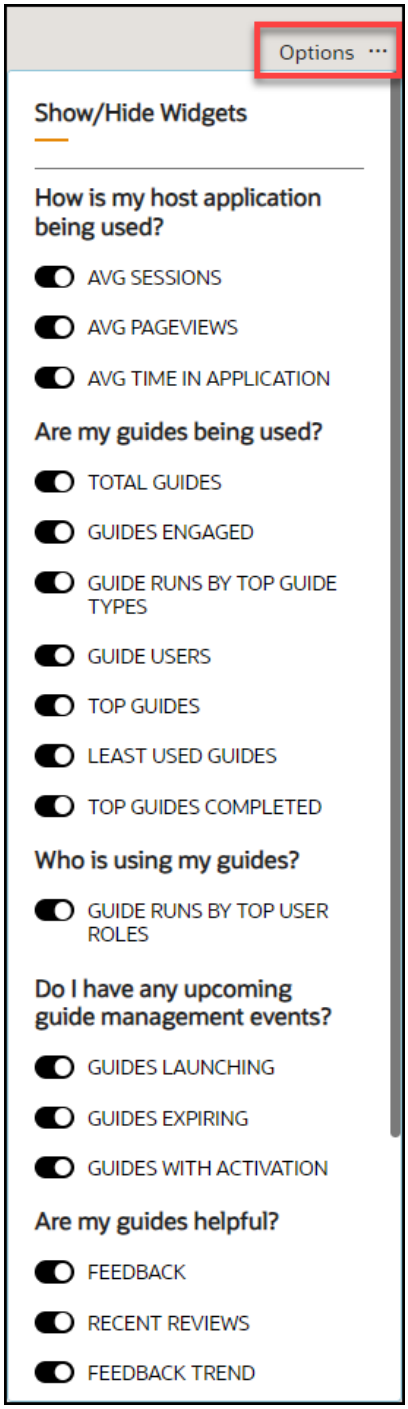

2. Enable or disable any of the dashboard widgets you wish to display by using the toggle switches.

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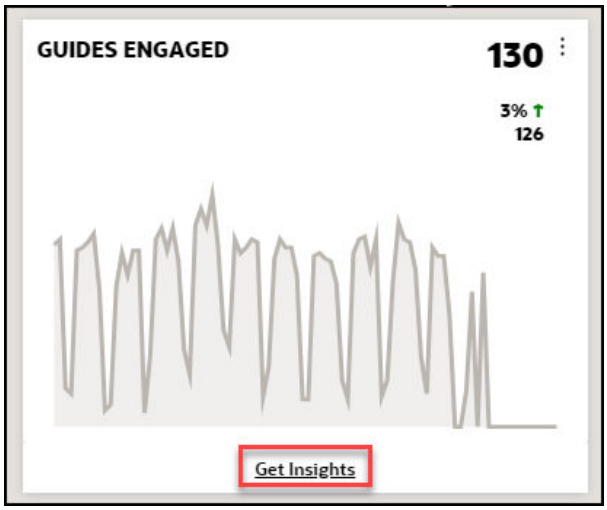
Get Insights

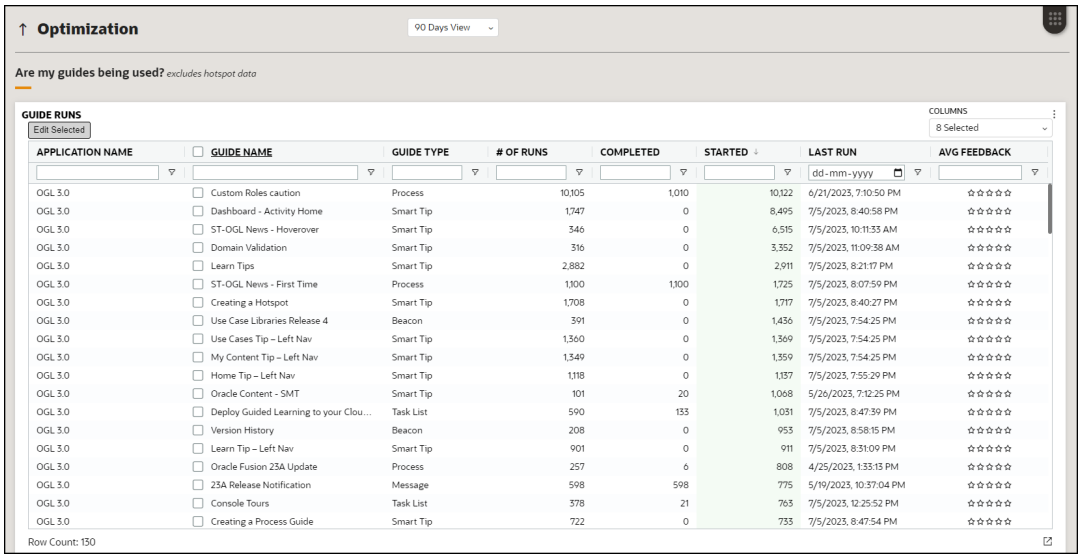
The Optimization dashboard displays various tiles, or "widgets", that provide analyses of OGL consumption data and host application activity. Some of the widgets on the Optimization dashboard offer additional in-depth data analysis allowing you to get insights about your guides and how they are being consumed. These insights can help you make data-driven decisions about content development, guide maintenance, and even process innovation.

To get detailed insights on a tab:

1. Navigate to the Optimization dashboard.
2. To view insights for a specific tab, choose the tab and select **Get Insights**.



The detailed insight is now displayed.



3. You may choose multiple guides and select **Edit Selected** to edit several guides at once.

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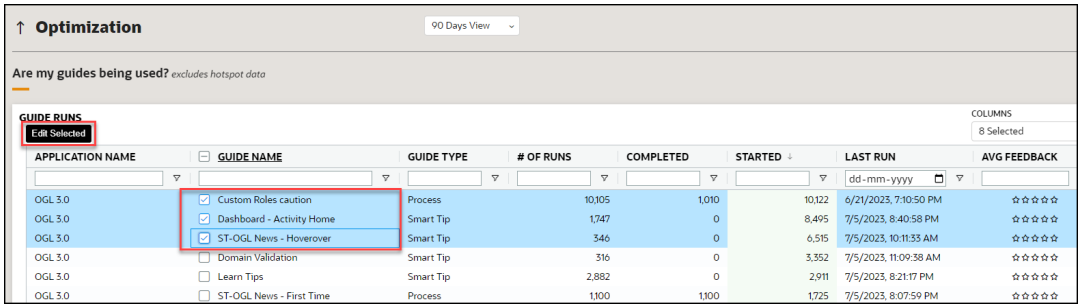
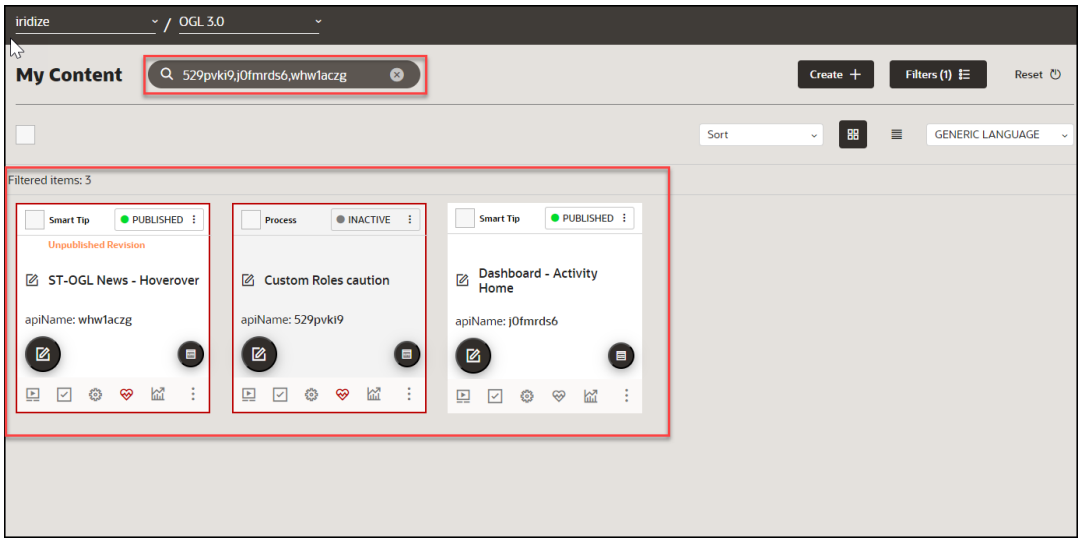


This will open a filtered window where you can access the selected guides to edit them.



Analytics Filtering

Apply data filters by selecting the **Filter** (Funnel icon) and then apply the desired filter from the available filter types. Use these filters to refine the data and the selected data gets displayed in the dashboard.

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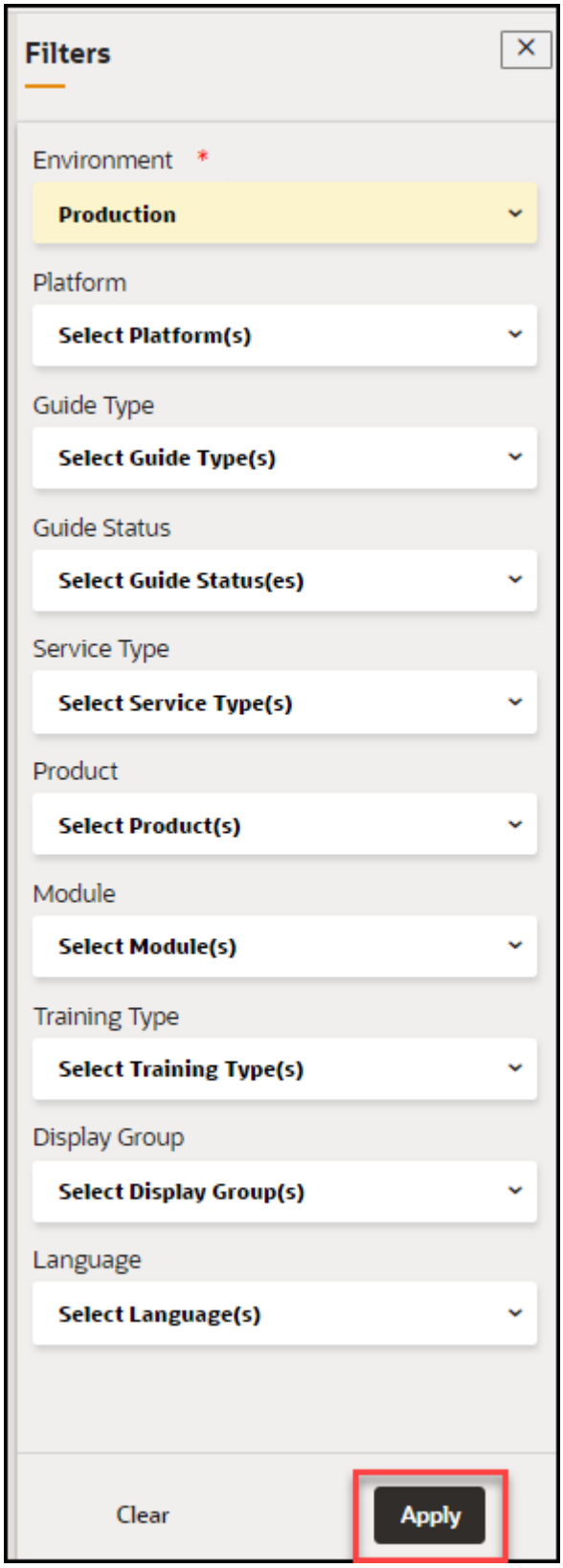

Once a user has applied a filter, the number of filters will be displayed. Hover the mouse pointer over the filters links to display which filters have been applied:

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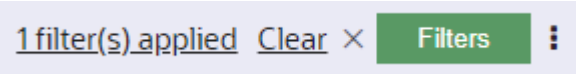

The following is a list of the available filters:

- **Environment:** Development/ Production
- **Platform:** Desktop/Mobile
- **Guide Type:** Smart-Tip/Process/Message/Beacon/Link/Process/Task List/Training/Video
- **Guide Status:** Draft/Published/Inactive/Unpublished Revision
- **Service Type:** Managed/Unmanaged services.
- **Product:** Only available if the Products & Modules have been defined and items assigned. Refer to the *Defining Products and Modules* section
- **Module:** Only available if the Products & Modules have been defined and items assigned. Refer to the *Defining Products and Modules* section
- **Training Type:** Available if the OGL instance has been configured to track different training guide types
- **Display Group:** All Display Groups created in the Display Group Manager. Refer to the *Display Groups* section.
- **Languages:** Filter based on the supported languages. This is only available for multilanguage deployments.

Activity Dashboard

The activity dashboard is a starting point for understanding a summary of guide activity for a specified time period by type as well as summarizing user engagement metrics during that period.

Accessing the Activity Analytics dashboard:

1. On the OGL Console homepage, go to the left navigation panel.You can see the **Analytics & Reports** section in the navigation panel. in the OGL Console
2. Select the **Dashboards** dropdown menu.

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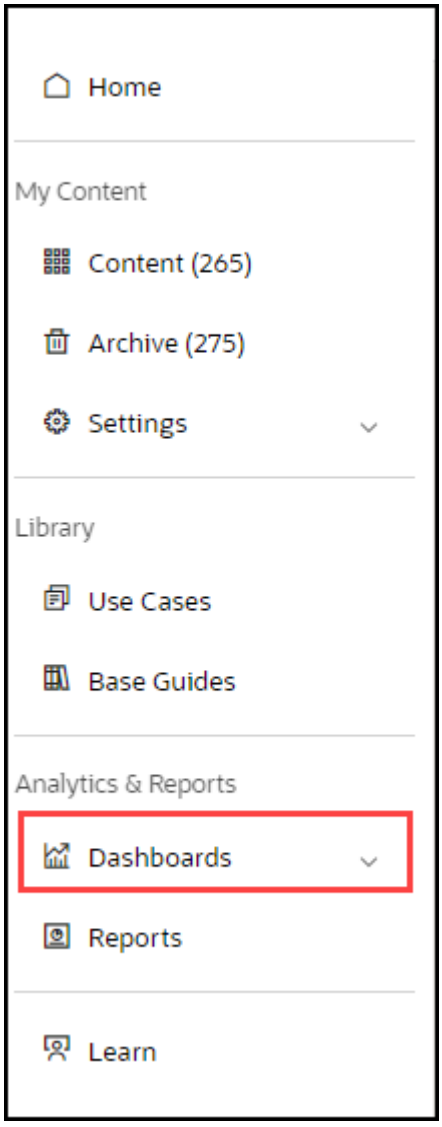

3. Select **Activity** in the Dashboards area.

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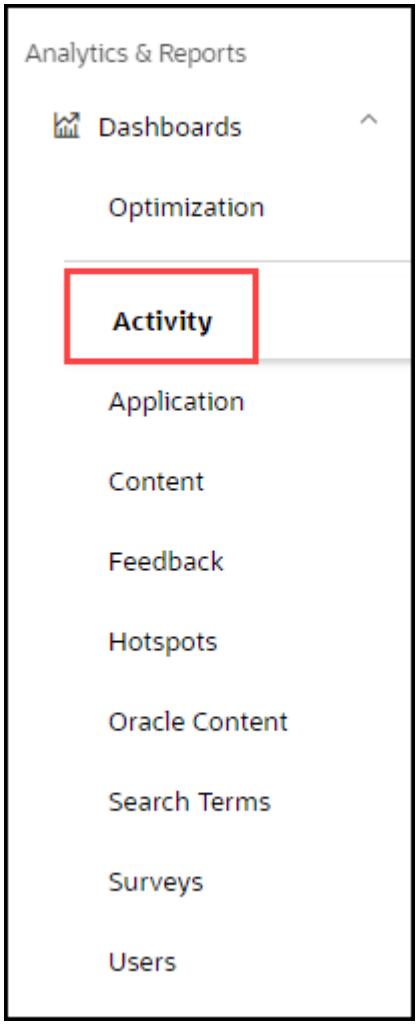
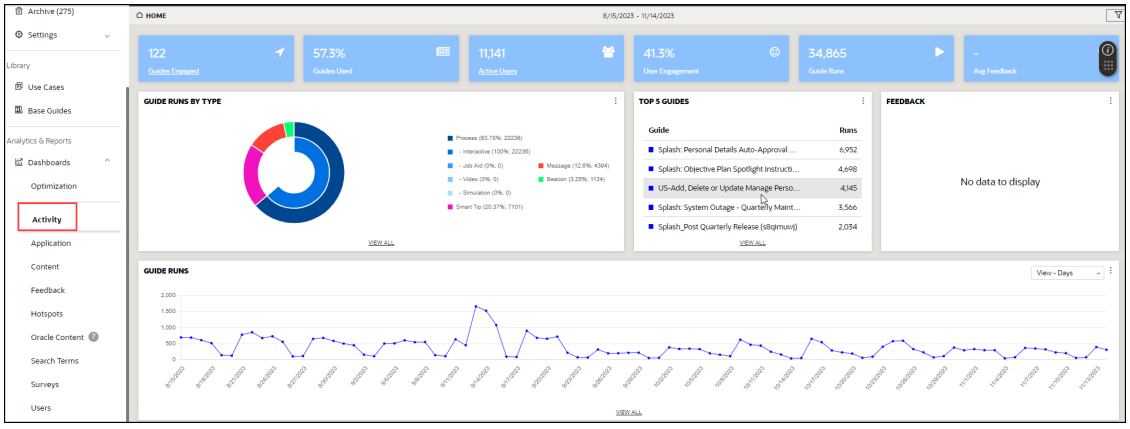


Activity Dashboard is displayed



- **Guides Engaged**: A guide with which a user has engaged during the defined period. The definition of "engagement" varies for different Guide types.

  (Note: For more information about how guide engagement is calculated, see the **Guide Engagement Definitions** section below)

- **Guides Used**: Guides Engaged/Total Guides
- **Active Users**: Unique users that have interacted with a guide during the reporting period

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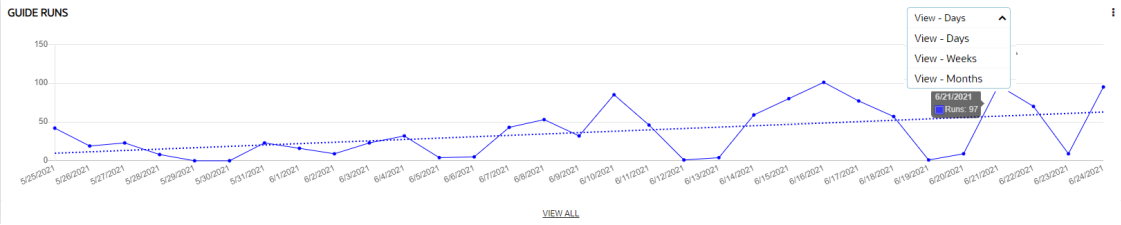
- **User Engagement**: Active Users/Host App Users during the reporting period
- **Guide Runs:** The number of times any guide has been engaged during the reporting period. A single guide engaged multiple times will count multiple times in this number.
- **Average Feedback**: Total Feedback Score/Total Feedback Responses

The center of the dashboard displays OGL consumption data in a graphical format:

- **Guide Runs by Type**: Pie chart with a detailed legend distinguishes the percentage of type of OGL items consumed
- **Top 5 Guides**: List of most-used guides by views. API Name is displayed in parenthesis
- **Feedback**: View and analyze user feedback on OGL content items.

Guide Runs Chart

The bottom of the Dashboard displays the chart of Daily Guide Runs for the selected reporting period; now you can also toggle the Trend Line over for the reporting period or use the daily, weekly, and monthly views.



Guide Runs by Type

To view guide runs by type within the Activity Analytics dashboard:

1. On the OGL Console homepage, go to the left navigation panel.You can see the **Analytics & Reports** section in the navigation panel. in the OGL Console
2. Select the **Dashboards** dropdown menu.

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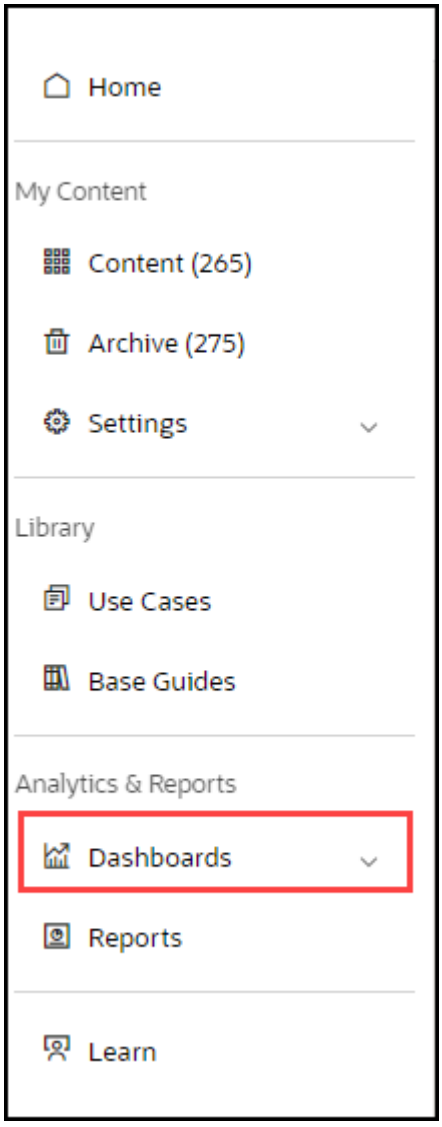

3. Select **Activity** in the Dashboards area.

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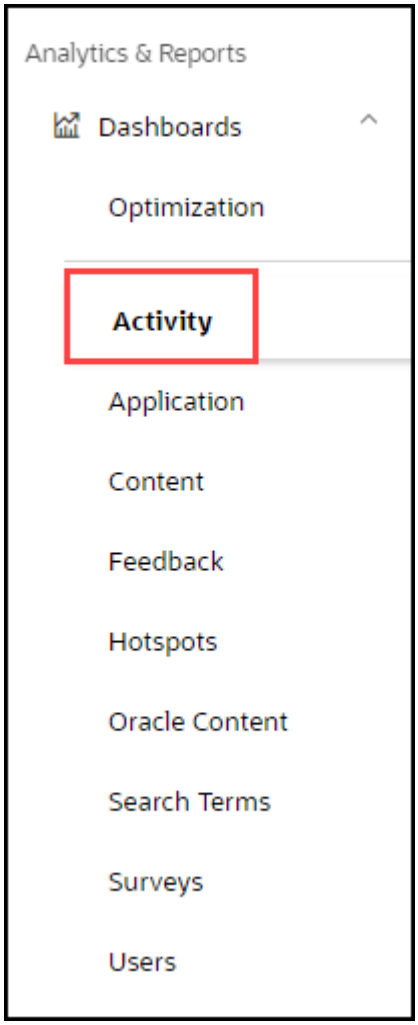
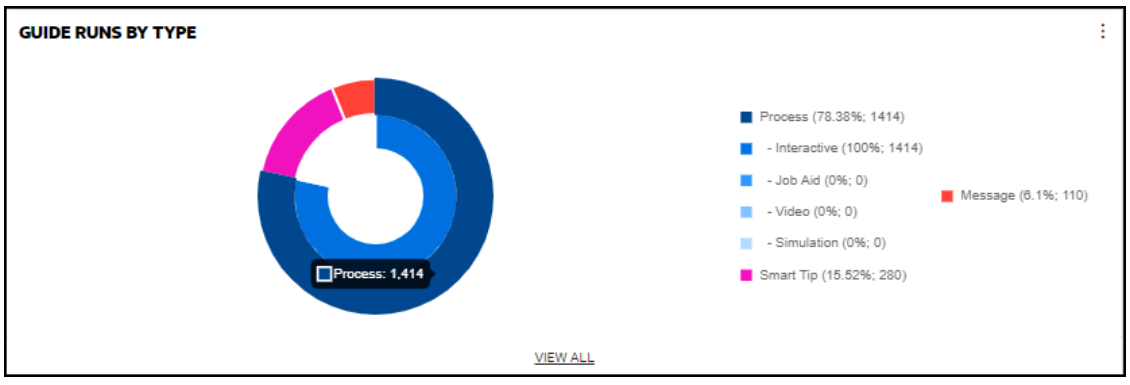


4. Select the guide type by clicking on the color matching the guide type in the pie chart. For example, place your cursor on ■ color which is a Process Guide type.



The detailed process guide analytics is displayed.

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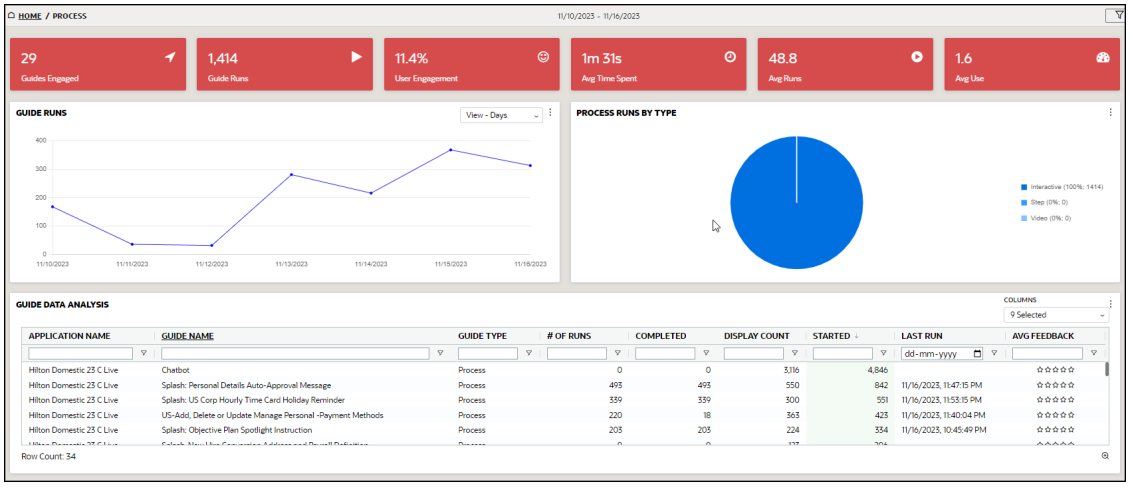

- **Guides Engaged:** Number of engaged guides during the time period. This number includes all content. Use the Filter button in the upper right-hand corner to view Process guides or Smart Tip guides only.
- **Guide Runs:** Number of times a guide has been run. "Guide" includes all content, including:
  - Process Guide Engagement: When a user launches a process guide from the Help Panel, this is recorded as guide engagement. This typically involves a step-by-step walkthrough of a specific process or task.
  - Auto Launch Process Guide Engagement: When a user advances to the second step of an auto-launched process guide or selects "Done" in a splash guide, this is recorded as guide engagement.
  - Message Engagement: When the user selects “Done” after interacting with the message, this action is recorded as a guide engagement.
  - Video and Training Engagement: When a user selects "Done" after interacting with a video, or training guide, it is recorded as guide engagement.
  - Smart Tip Engagement: When a user interacts with a smart tip, such as hovering over the tooltip or clicking on the help icon, it is recorded as guide engagement. Smart tips are one-step guides that include one or more tips presented as tooltips (element-based) or icons.
  - Beacon Engagement: When a user interacts with a beacon, such as hovering over the tooltip or clicking on the help icon, this is recorded as guide engagement. Beacons are one-step guides that provide guidance using visual cues or indicators.
- **Users Engagement:** Number of users who have engaged with OGL divided by the total number of users active in the host application during the selected time period
- **Average Time Spent:** Average time users have spent in a guide
- **Average Runs:** Number of guides run (see # in second red box) divided by the number of active guides (see # in first red box)
- **Average Use:** Number of all guide runs (second red box) divided by active users

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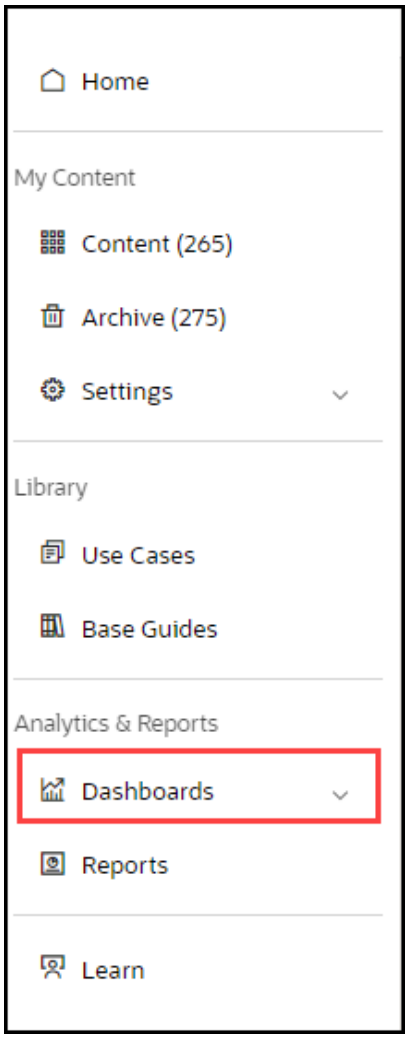
Application Dashboard

The Application Analytics dashboard allows analysts to view traffic on specific pages. This dashboard leverages the pages documented in the Pages manager and provides traffic information for those pages.

Accessing the Application Analytics dashboard:

1. On the OGL Console homepage, go to the left navigation panel.You can see the **Analytics & Reports** section in the navigation panel. in the OGL Console
2. Select **Dashboards** dropdown menu.



3. Select **Application** in the Dashboards area.

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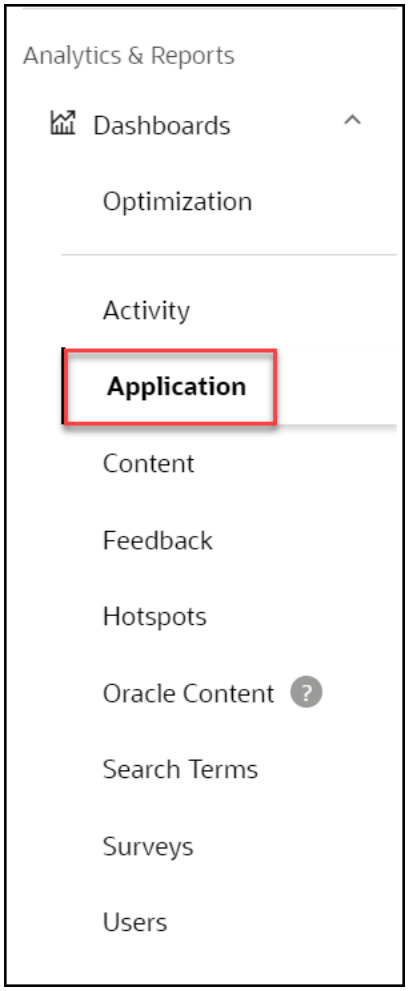

The Application Analytics dashboard allows analysts to view traffic on specific pages, as defined in the Pages manager, and provides traffic information for those pages. Across the top of the dashboard, up to six of the most viewed pages are displayed. The second row displays the distribution of page views by day of the week and unique user numbers during the reporting time period. Finally, the table at the bottom provides the ability to download the data as well as filter and sort on an ad-hoc basis using multiple criteria.

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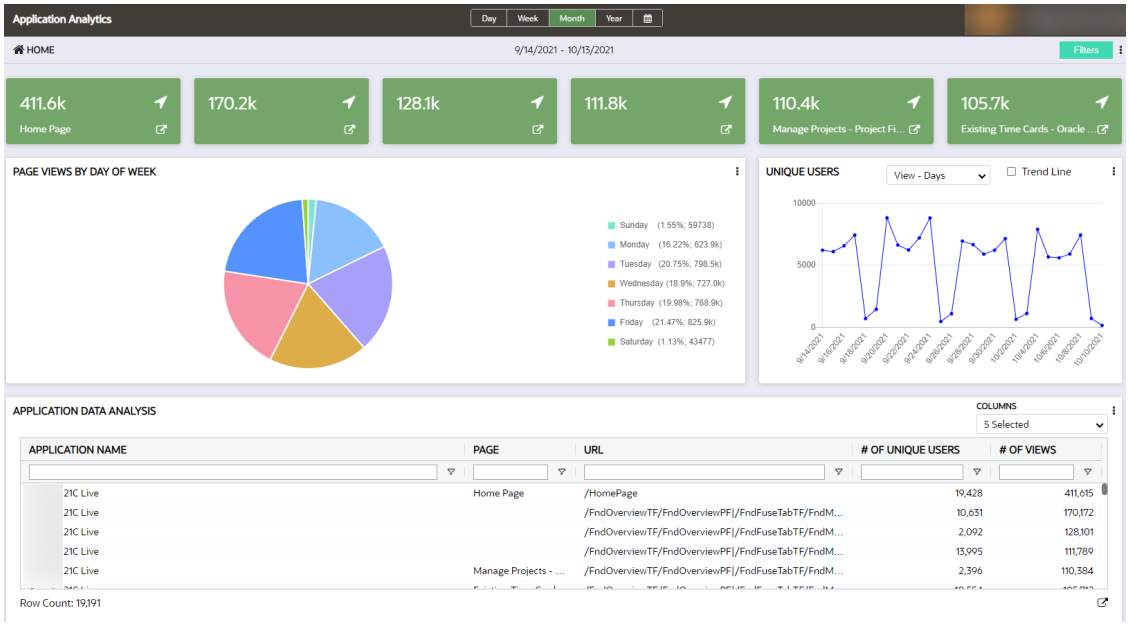

Content Dashboard

Accessing the Content Analytics dashboard:

1. On the OGL Console homepage, go to the left navigation panel.You can see the **Analytics & Reports** section in the navigation panel. in the OGL Console
2. Select **Dashboards** dropdown menu.

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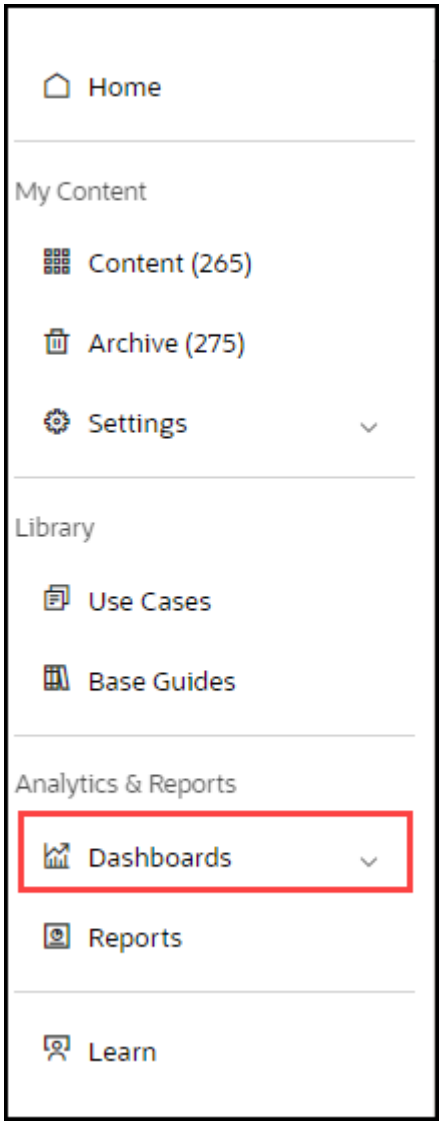

3. Select **Content** in the Dashboards area.

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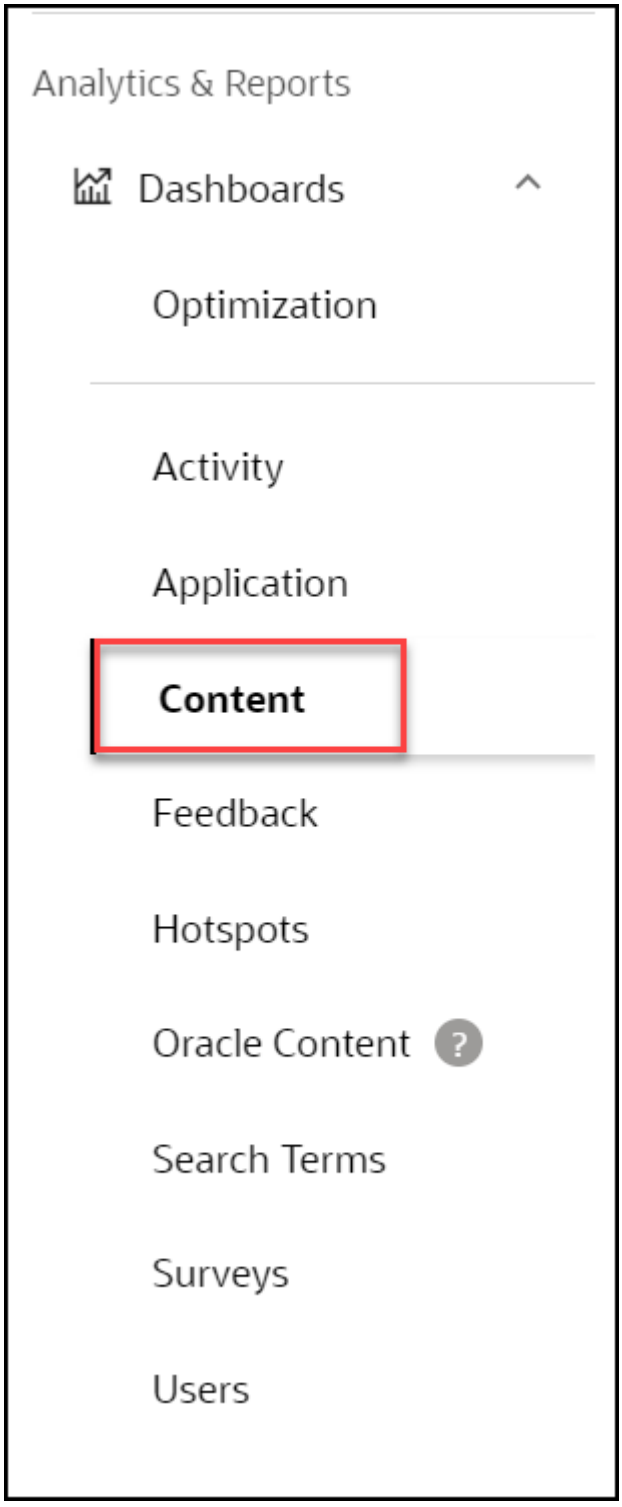

The Content Dashboard replaces the information previously delivered in the left panel of the dashboard. The Content Dashboard provides data on how many of each type of guide is available in the Console (not including guides in the Archive section). There have been many requests to be able to download into a spreadsheet a list of the guides in the Console. This is now possible, along with useful information on each guide, by downloading the table on the Content Dashboard. The Content Dashboard table is fully sortable and can be filtered in many ways, allowing users to easily find information.

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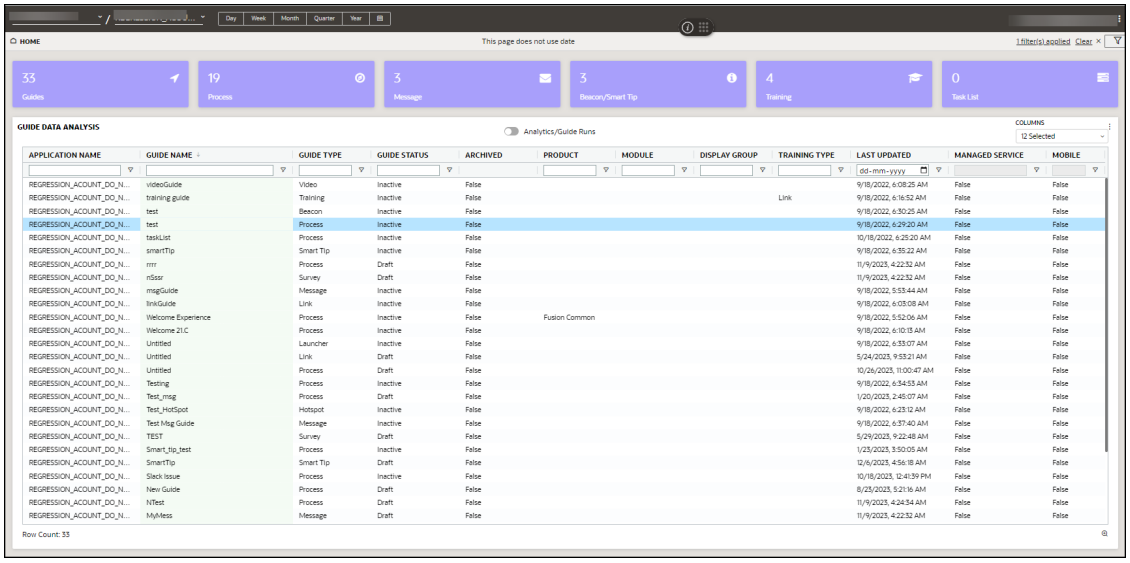

- **Guides:** Total number of OGL items
- **Process:**Total number of process guides
- **Message:** Total number of messages
- **Beacon/Smart-Tip:** Total number of beacons & smart-tips
- **Training:** Total number of training content
- **Task List:** Total number of task lists

Feedback Dashboard

OGL Administrators can request feedback from users on OGL guides directly within the fusion environment by enabling the Feedback function in the OGL console, and view results via the **Feedback** dashboard.

While enabling OGL feedback, your team may set a strategy for requests, including:

- Frequency: Gather in any range of frequency from always (100%) to never (0%)
- Type: Information includes rating (1-5 stars) and optional free text response.
- Specificity: Once enabled, feedback can be toggled on or off for one or more specified items. You might use this feature to request feedback for a new or revised item.

Accessing the Feedback Analytics dashboard:

1. On the OGL console homepage, go to the left naigation panel. You can see the **Analytics & Reports** section in the navigation panel. in the OGL Console
2. Select **Dashboards** dropdown menu.

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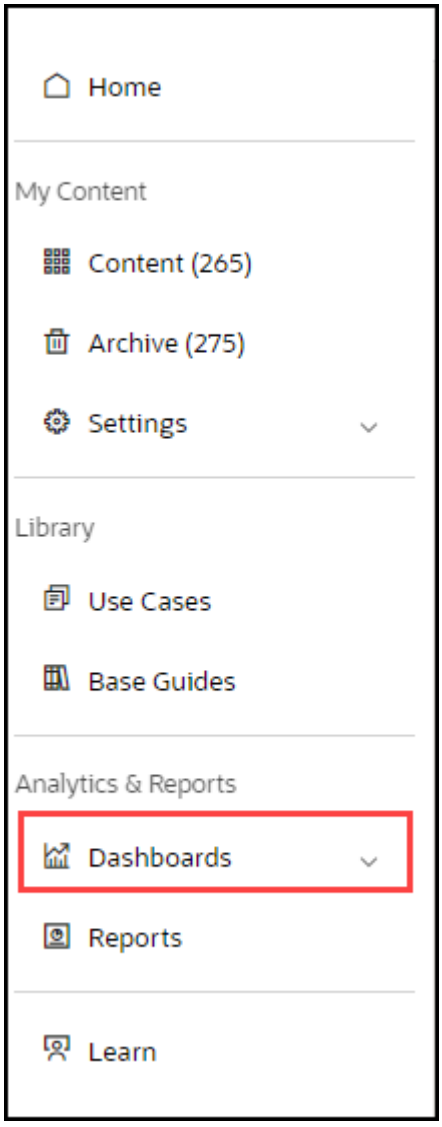

3. Select **Feedback** in the Dashboards area.

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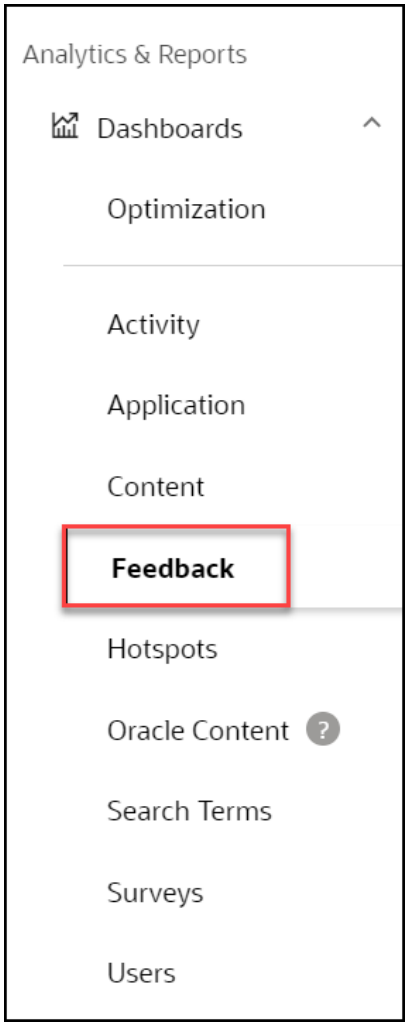
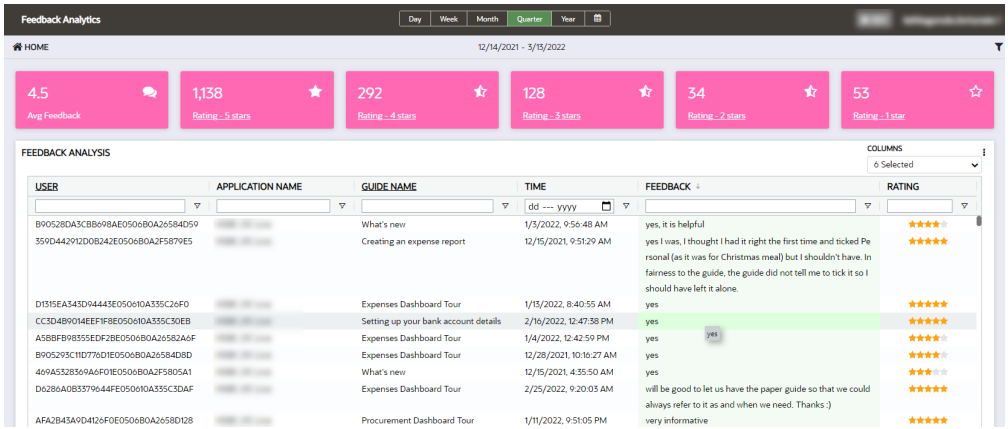


Reviews allow you to gain valuable feedback from your users, use this to improve product and service offerings. OGL deployments with the feedback functionality enabled will enjoy the added benefit of having access to the new feedback dashboard to analyze user satisfaction and where content can be improved. The dashboard allows you to drill down into the feedback detail. Use this facility to further understand where and how to improve OGL items, address user concerns, and improve decision-making in building and provisioning OGL items.



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Hotspots Dashboard

Hotspots and Launchers can be used to gather information about how users are interacting in the cloud application. The Hotspot Dashboard highlights top-performing Hotspots and Launchers allowing a detailed analysis of the user behavior.

With this information, OGL content can be deployed based on user traffic.

- Notifying users of upcoming changes: Hotspots can identify application usage to determine the best locations in the application to launch a message providing information and training to prepare impacted users for change.
- Redirect user action: Hotspots can identify how users are navigating in the application in response to feedback on system functionality - the data may reveal users are selecting a less efficient option to navigate in the system, allowing the deployment of a content to share a more efficient navigation path with impacted users.

Accessing the Hotspots Analytics dashboard:

1. On the OGL Console homepage, go to the left navigation panel.You can see the **Analytics & Reports** section in the navigation panel. in the OGL Console
2. Select **Dashboards** dropdown menu.

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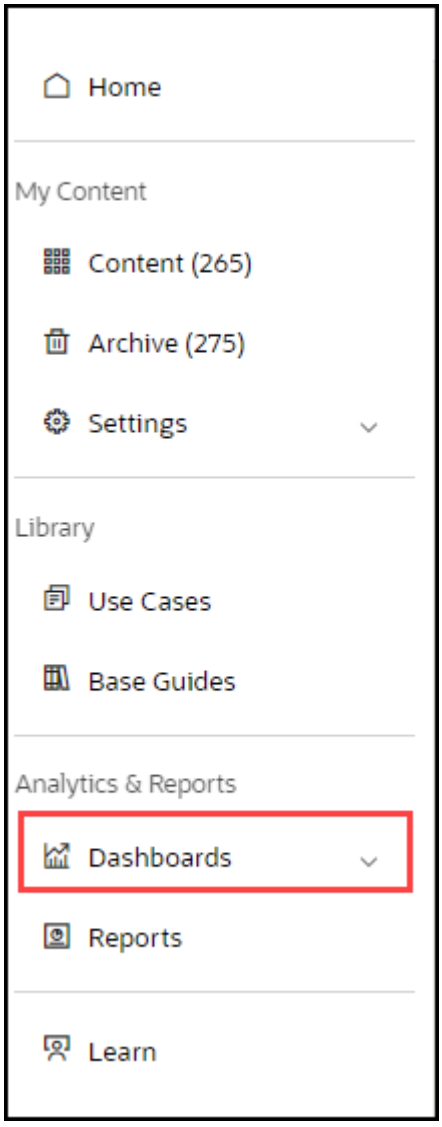

3. Select **Hotspots** in the Dashboards area.

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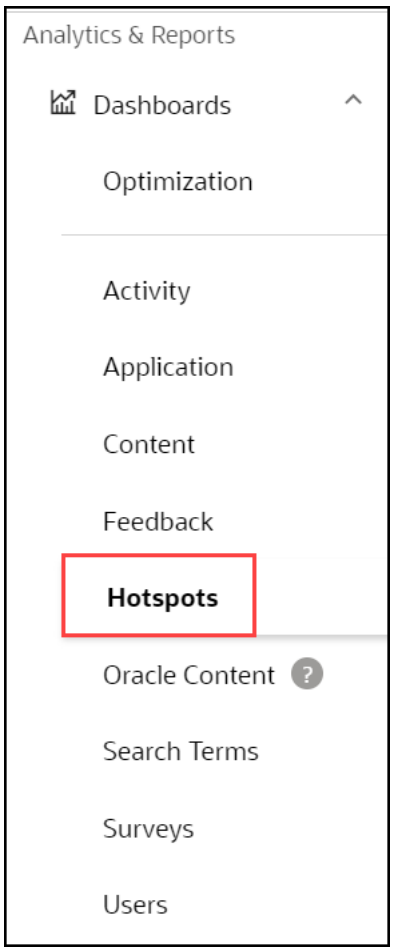
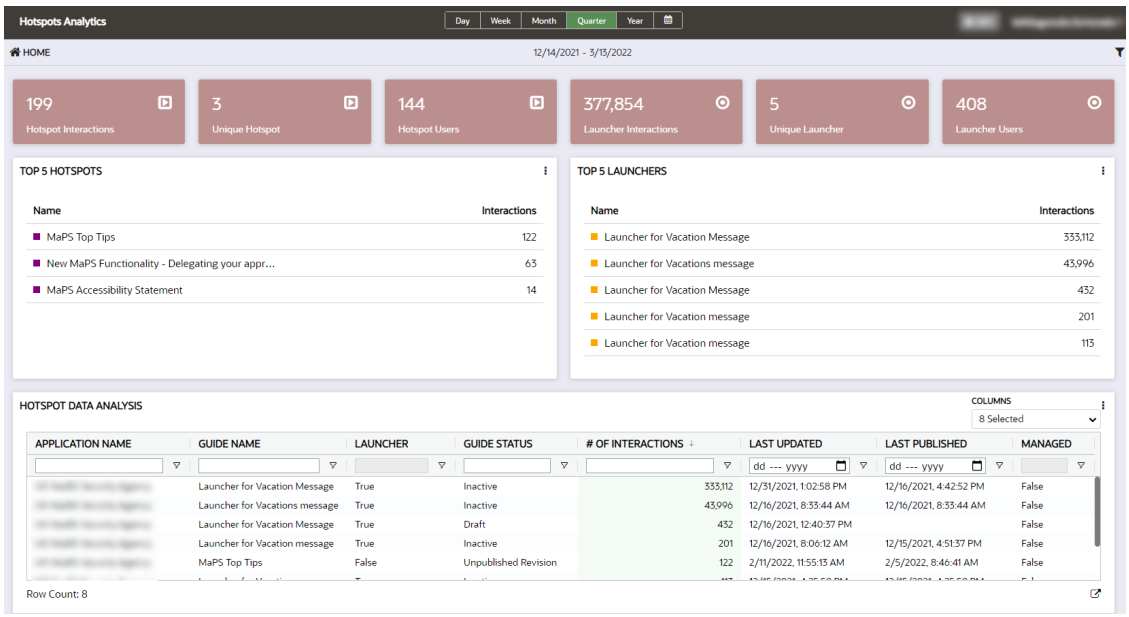


The Hotspots and Launcher capabilities introduce a new dashboard in analytics to provide key information relating to the activity being tracked by Launchers and Hotspots. You can maximize impact by continually monitoring and improving your hotspot tracking to make informed decisions and create highly effective content. This improves possible exposure to users based on user traffic. The dashboard highlights top-performing Hotspots, Launchers, and allows for a detailed analysis of user behavior.



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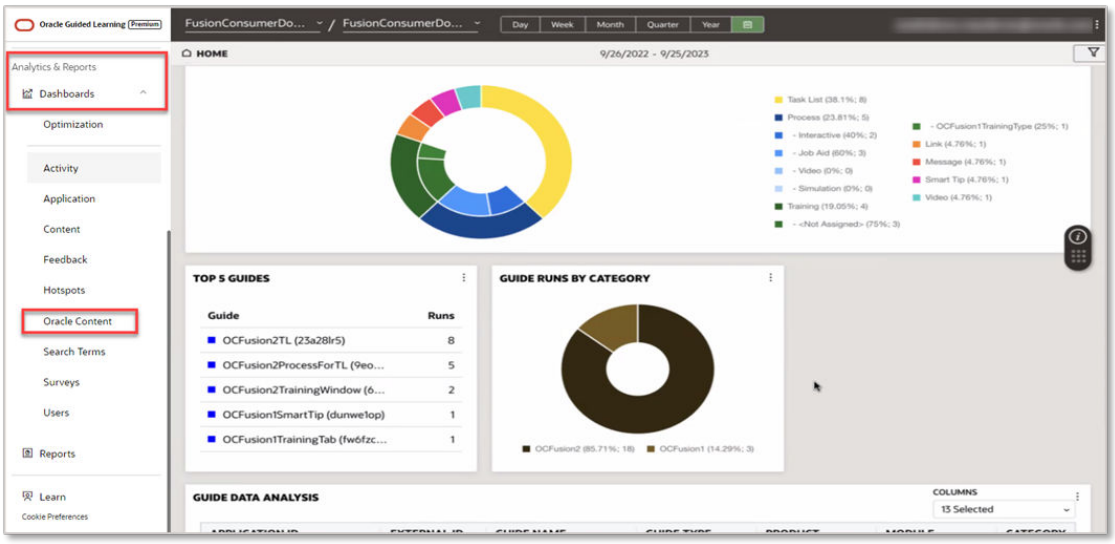
Oracle Content Dashboard

The Oracle Content Dashboard adds to OGL's Analytics and Reports capabilities to provide guide activity data of Oracle Content. OGL administrators who have Oracle Content enabled on their account will see a new dashboard under the Analytics & Reports Dashboards drop-down menu that is specific to Oracle Content Analytics.



The following aspects should be considered when viewing Oracle Content:Oracle Content analytics dashboard will not have the ability to drill down of data. Instead, administrators can export data to apply additional business intelligence and data analysis.Analytics filters do not correspond to My Content library assets, but rather to Oracle Content categories, products, and modules that are enabled in the Oracle Content control panel located in the left navigation panel.

Search Terms Dashboard

Hotspots and Launchers can be used to gather information about how users are interacting in the cloud application. The Hotspot Dashboard highlights top-performing Hotspots and Launchers allowing a detailed analysis of the user behavior.

With this information, OGL content can be deployed based on user traffic.

Notifying users of upcoming changes: Hotspots can identify application usage to determine the best locations in the application to launch a message providing information and training to prepare impacted users for change.

Redirect user action: Hotspots can identify how users are navigating in the application in response to feedback on system functionality - the data may reveal users are selecting a less efficient option to navigate in the system, allowing the deployment of a content to share a more efficient navigation path with impacted users.

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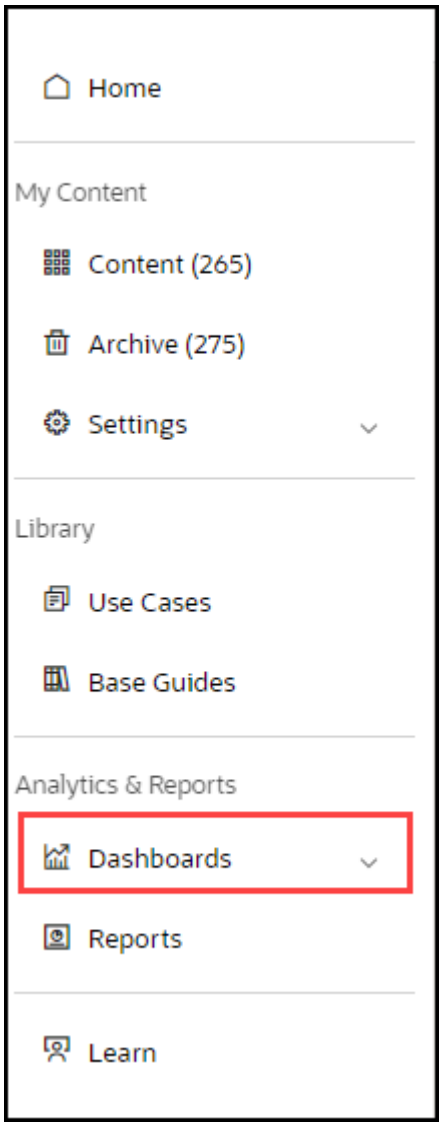
Accessing the Search Terms Analytics dashboard:

1. On the OGL Console homepage, go to the left navigation panel.
   You can see the **Analytics & Reports** section in the navigation panel.

   Select the **Dashboards** dropdown menu. in the OGL Console
2. Select **Dashboards** dropdown menu.



3. Select **Search Terms** in the Dashboards area.

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Whenever users search for content in the widget, OGL actively tracks all the search terms. Searches with results returned and those without results are reported to OGL analytics. This information is used to improve keywords associated with specific OGL items to maximize how easily users can locate and utilize items in the content library. Setup weekly/monthly/quarterly reviews of the search-term analytics to ensure the content library is continually aligned to what users are searching in the Widget. Since this feature provides visibility into the kind of help users are after, the dashboard becomes a valuable source of ideas on what content needs to be added by identifying gaps in the offering.

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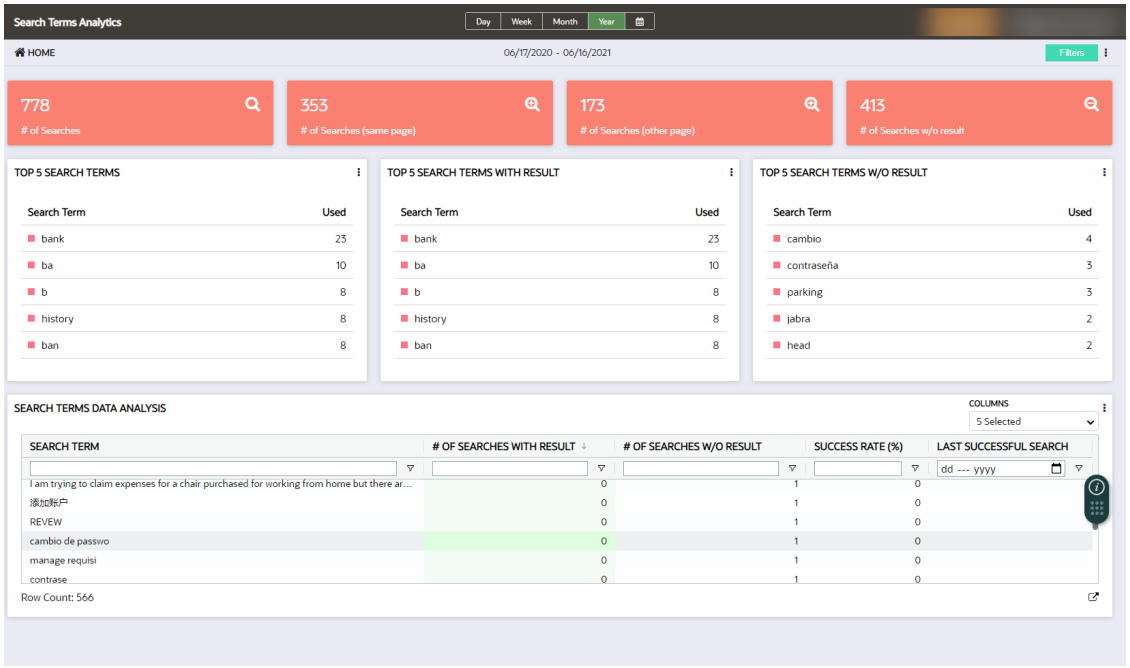

Surveys Analytics Dashboard

The Survey Analytics Dashboard gives you to the ability to process, store, and visualize survey data that is provided by end users who complete surveys. This adds another tool in OGL's "insight to action" toolchest, supporting content management, product management, and analytics.

Accessing Surveys Analytics Dashboard

1. On the OGL Console homepage, go to the left navigation panel.
   You can see the **Analytics & Reports** section in the navigation panel.
2. Select the **Dashboards** dropdown menu.

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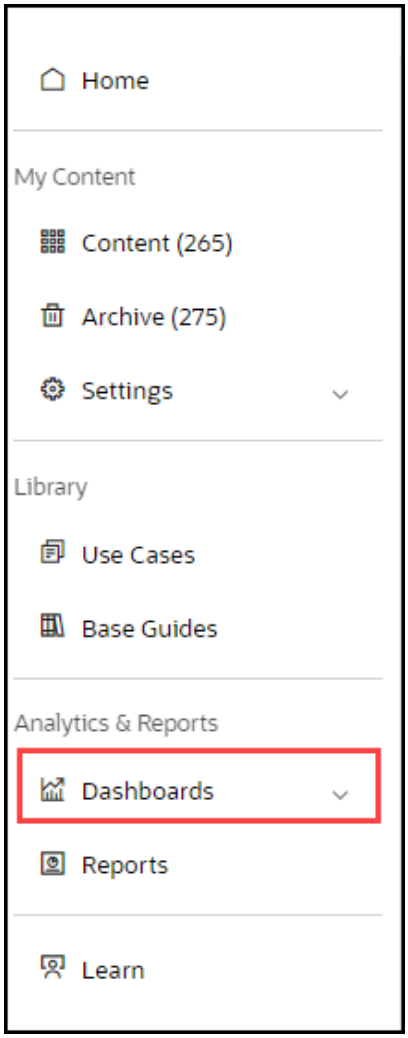

3. Select **Surveys** in the Dashboards area.

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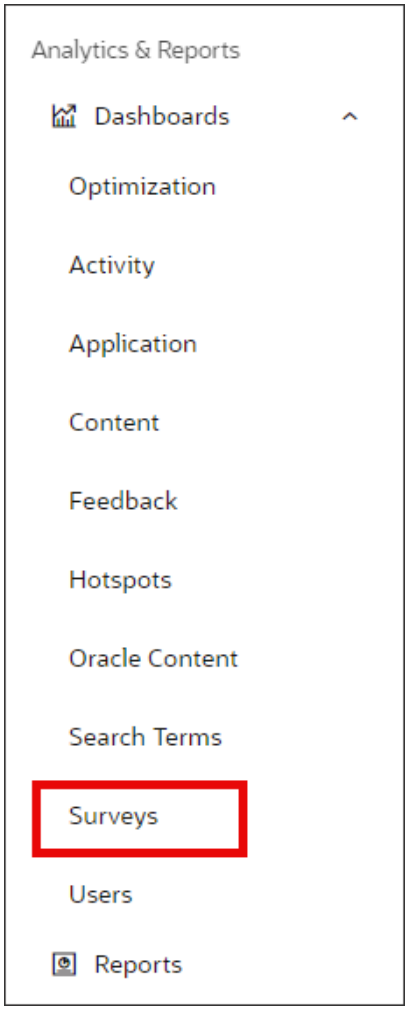

The **Surveys Dashboard** replaces the information previously delivered in the left panel of the dashboard. The Surveys Dashboard summarizes survey data as collected by end users in the host application who have completed survey guides, including the application name, guide name (or apiName), number of runs, number of completions, number of times the survey was started, and the last run date.

To view analytics of response data for a specific survey, select the Guide Name of the survey to open it.

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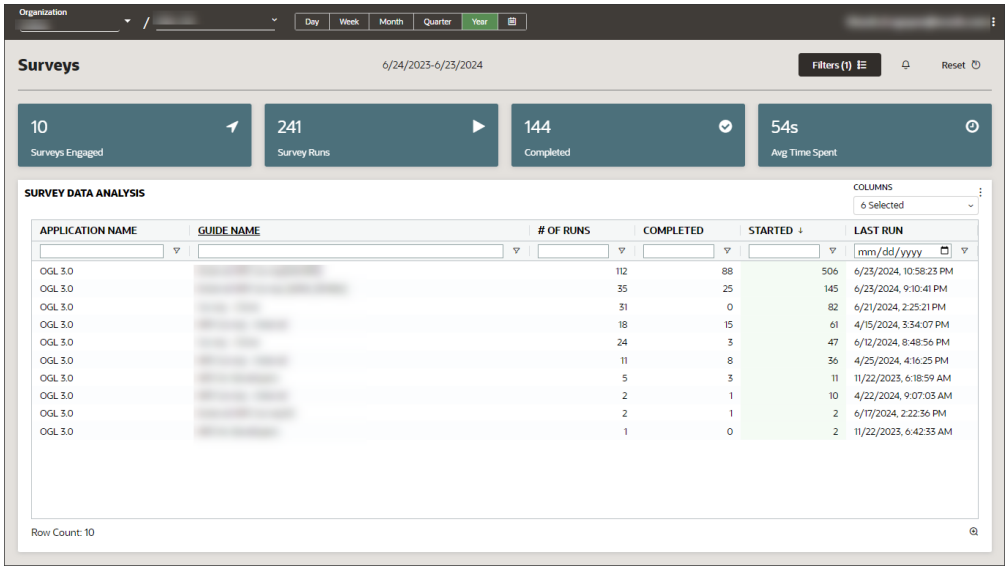

The Surveys Dashboard opens the results of the selected survey and displays the survey analytics for that guide, including total number of views, total unique views, rate of user engagement, and average time spent. Below the summary, you can also see a breakdown of each survey question, answer options, and total responses for each question.

Filtering Survey Data

1. Select the **Filters** button to open the filter panel.
2. Select the environment(s) to include in the analytics (**Development** and/or **Production)**.

Exporting Survey Data

1. To export the survey response data into a CSV or Excel file, select the " ⋮ " icon in the top-right corner of each survey question.
2. To export all data from the survey into a report, select the **Generate Survey Report** button to have the report emailed to your email address.

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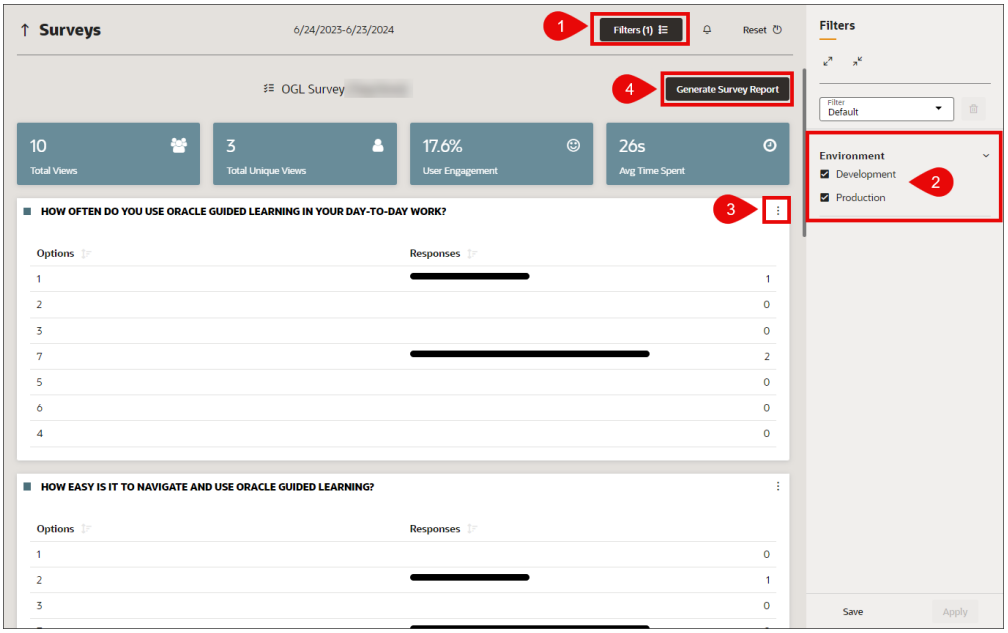

Users Dashboard

The Users Analytics dashboard provides information about user logins and activity in the host application, including unique users over time. Options to view additional details and filter views are also available using the links and menus on the page.

Accessing the Users Analytics dashboard:

1. On the OGL Console homepage, go to the left navigation panel.You can see the **Analytics & Reports** section in the navigation panel. in the OGL Console.
2. Select the **Dashboards** dropdown menu.

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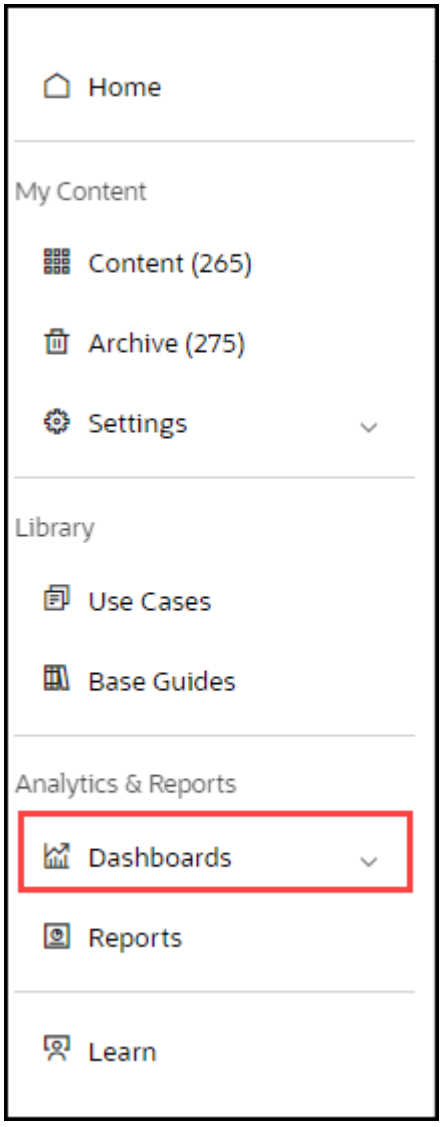

3. Select **Users** in the Dashobards area.

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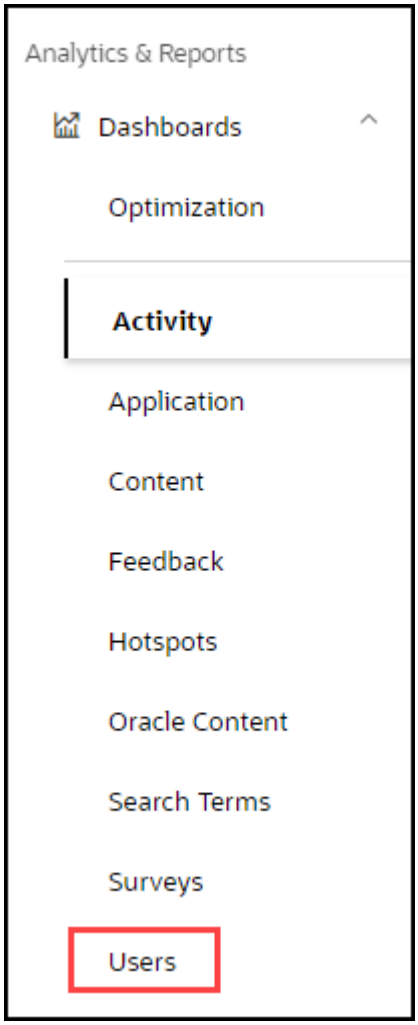
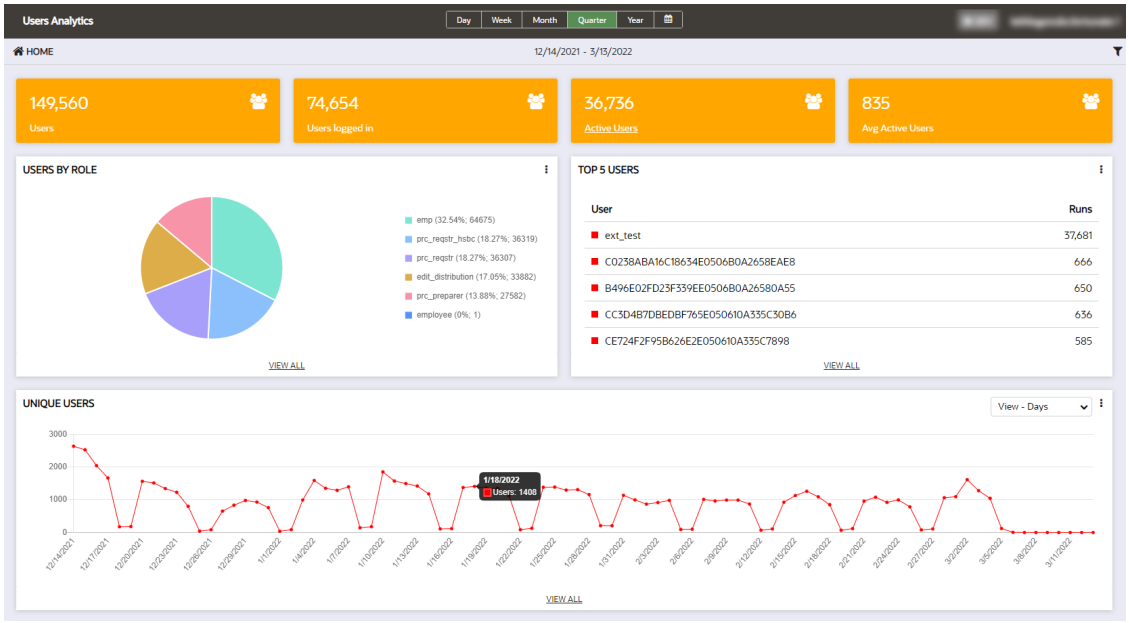


User Analytics dashboard is displayed.



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The User Dashboard provides detail from a user perspective on Oracle Guided Learning activity. This Dashboard displays the following:

- **Users**: Number of all-time users logged in to the host app (not affected by the reporting period)
- **Users Logged in**: Users logged in to the host app during the reporting time period
- **Active users**: Users that have engaged with OGL during the reporting time period
- **Average Active Users**: The average number of users that have engaged with OGL per day for the reporting period

If roles have been defined in the Oracle Guided Learning account, the number of users by role is also displayed.

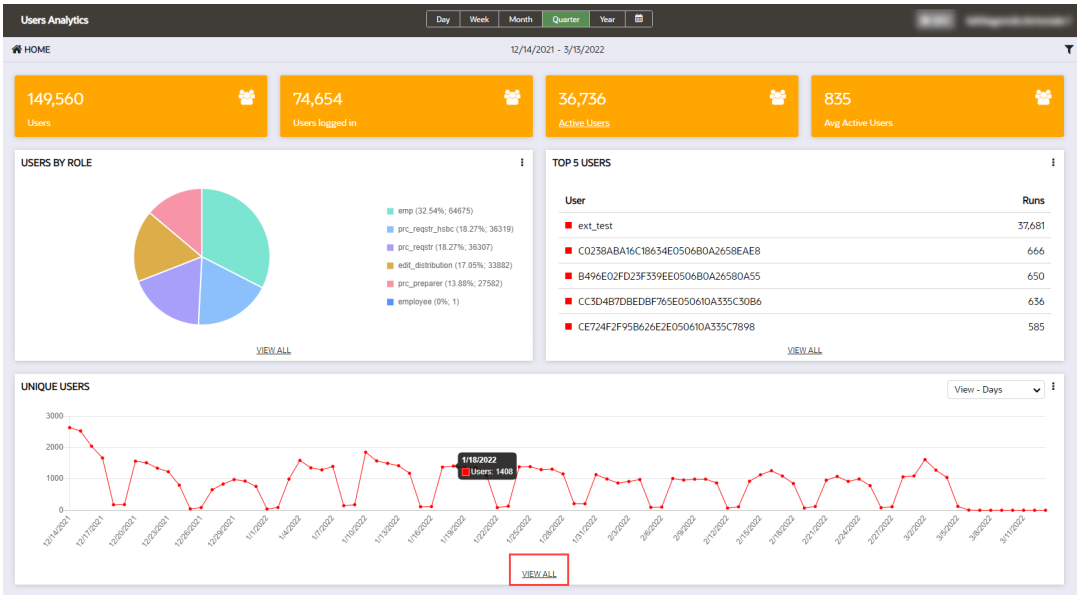
Please note the username can be displayed if local data regulations and our client's own data rules allow for the capture of the username in OGL. For clients bound by regulations such as GDPR, the username is not displayed because this data is not captured in Oracle Guided Learning.

Resetting User Analytics Data

In the User analytics dashboard, you can also reset a particular user's data which will make it appear like they are new to the application. To reset the data, perform the following steps.

> **Note**
>
> Resetting user data will delete all previous activity data for the user in analytics. This should only be used for development or testing purposes. Please contact your OGL administrator before resetting any user's data.

1. From either the **Top 5 Users** or **Unique Users** widgets, select **VIEW ALL** to drill down and view the User Data Analysis.



2. Click **Reset** button which will delete all previous activity data for the user in analytics.

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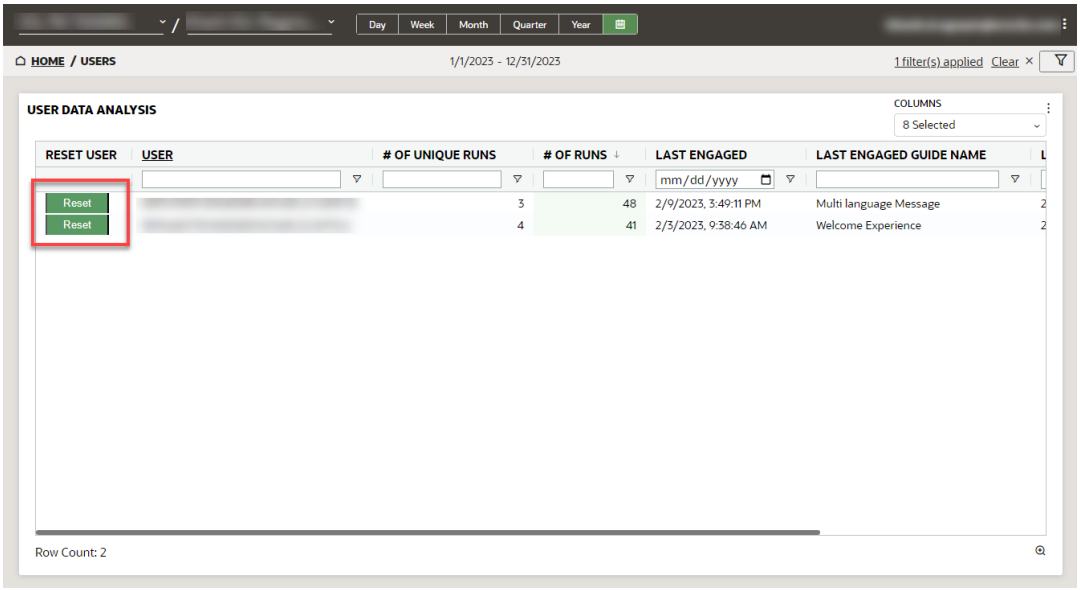

Reports

You can download complete reports customized to meet your unique specifications from the OGL Analytics Reports. Common configurations include Date Range, Application(s), Environment(s), Platform(s)and supported Export format.

Accessing the Reports dashboard:

1. On the OGL Console homepage, go to the left navigation panel.
   You can see the **Analytics & Reports** section in the navigation panel.
2. Select the **Reports** dropdown option.

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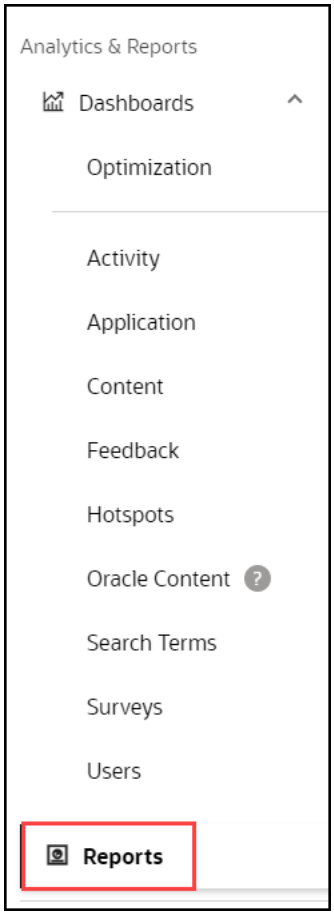
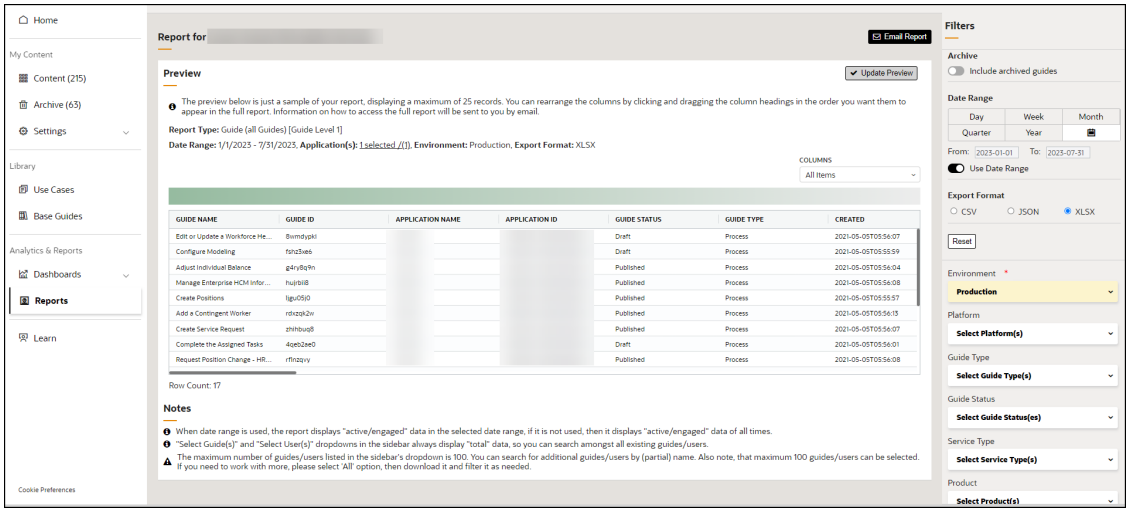


Reports Dashboard is displayed.



There are 4 main types of Reports that can be downloaded:

- **Guide**
- **User**
- **Feedback**
- **Bulk**

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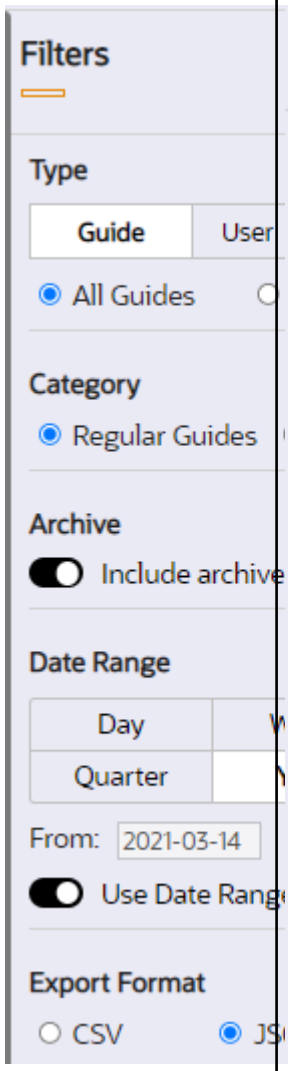
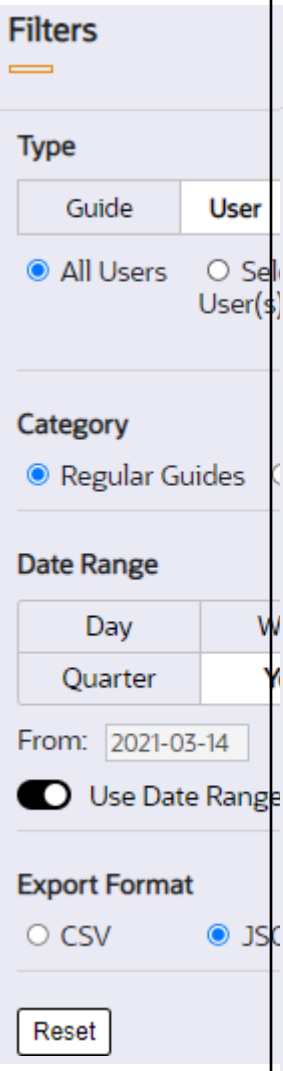
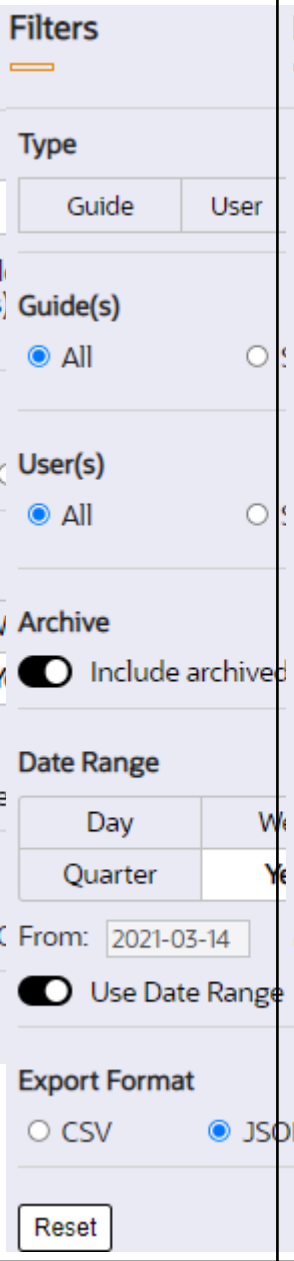
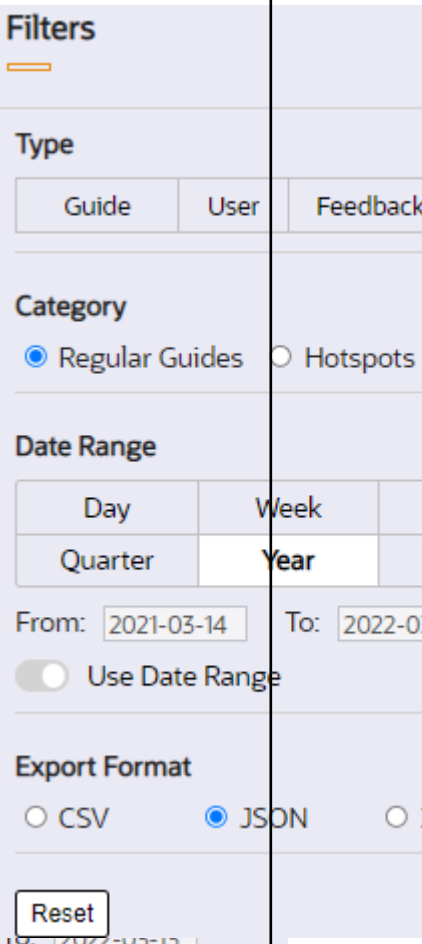
Guide	User	Feedback	Bulk
			
Notes: • When a date range is used, the report displays "active/engaged" data in the selected date range, if it is not used, then it displays "active/engaged" data of all times. • "Select Guide(s)" and "Select User(s)" dropdowns in the sidebar always display "total" data, so you can search amongst all existing guides/users. • The maximum number of guides/users listed in the sidebar's dropdown is 100. You can search for additional guides/users by (partial) name. Also note, that a maximum of 100 guides/users can be selected. If you need to work with more, please select the 'All' option, then download it and filter it as needed.			Note: • Bulk data is provided in a gzipped file. Processing the request might take a longer time. The browser will display a notification when the download is complete. If you leave the page, then the request will be canceled.

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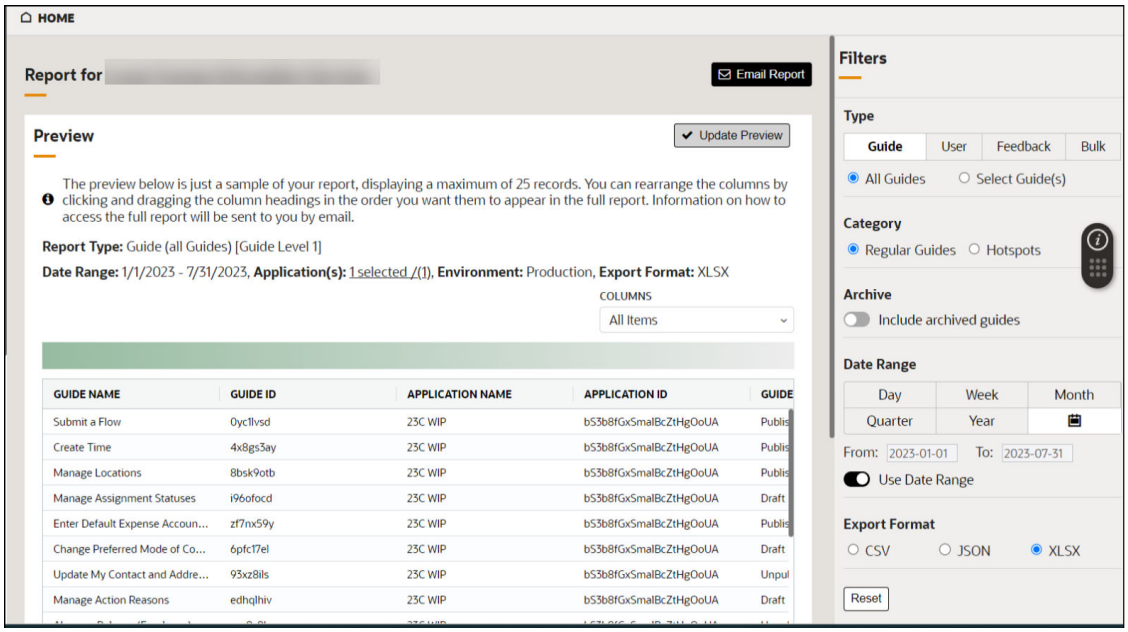
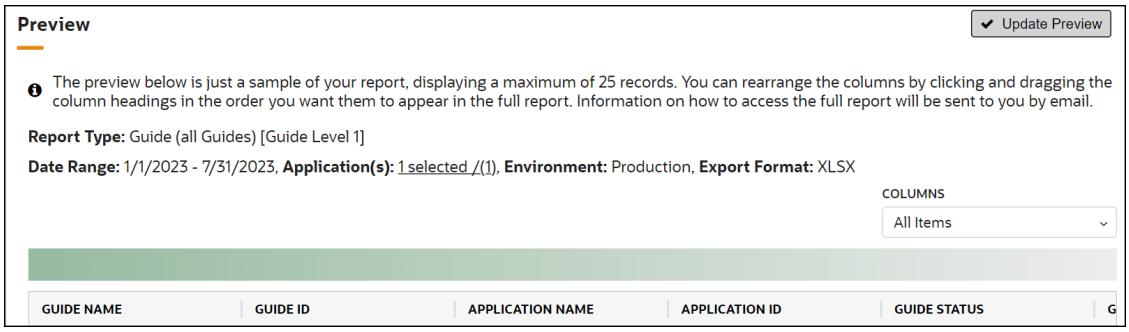
Once the options are selected, preview the data set by clicking on the **Update Preview** button in the main section of the window:



A summary of the criteria used for the report is presented above the preview table:



Select the Email Report button to request the required data report to be sent to your email address.

> **Note**
>
> A known issue has been identified in OGL reports in which the Update Preview function fails and returns an error when the user selects a combination of a **Report Type of Feedback and a Role Filter**. This issue will be fixed in a future release. As an interim workaround, users can generate a Feedback report without Role filters and instead, export the data to Excel or other Business Intelligence application to apply filters.

Schedule Email Reports

User can schedule recurring reports based on their filter selections and have the reports sent to their inbox to save time in recreating reports over time. Especially helpful when wanting to track and measure ongoing outputs from OGL.

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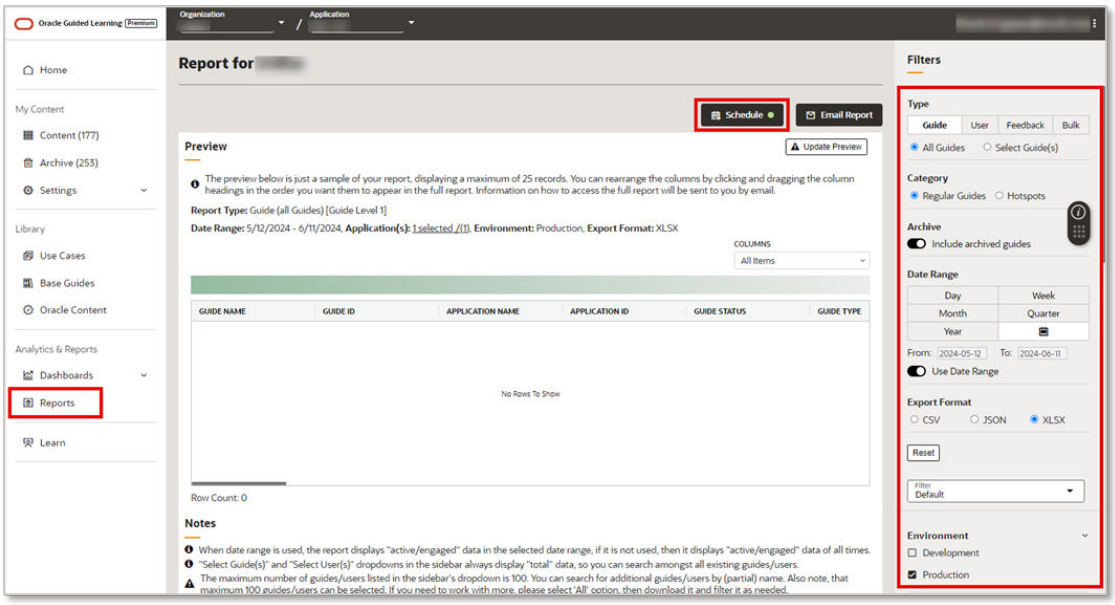
In **Reports**, you can schedule reports based on the filter parameters applied within the Filters panel. Simply apply your filters and then press the **Schedule** button.



> **Note**
>
> At present, this functionality only works upon the current view selected - i.e. you can only have 1 scheduled report based on 1 set of filters. To create another scheduled report, you will need to delete the first schedule and setup a new one. We will be looking at enhancements to this feature in future releases.

From the **Schedule** modal, you can specify the following settings for your report:

- Start and End date of the report schedule
- Report Frequency (daily, weekly, or monthly)
- Day(s) of the week and/or day(s) of the month that the report will be sent

Example 1: Daily report scheduled for every day starting on 8/28/24 ending on 12/31/24.

Data Filters applied**:** All guides, Last 24 hours, Production env, Desktop platform, Published status, Excel format.

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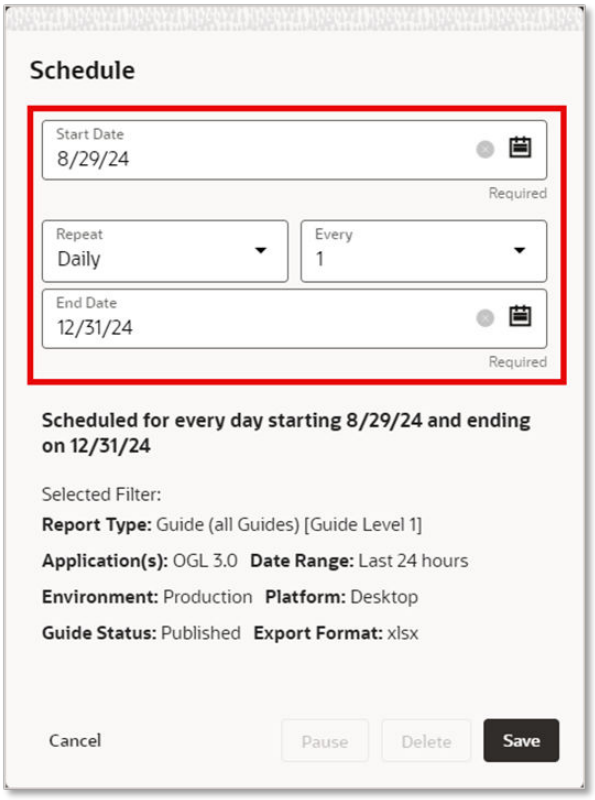
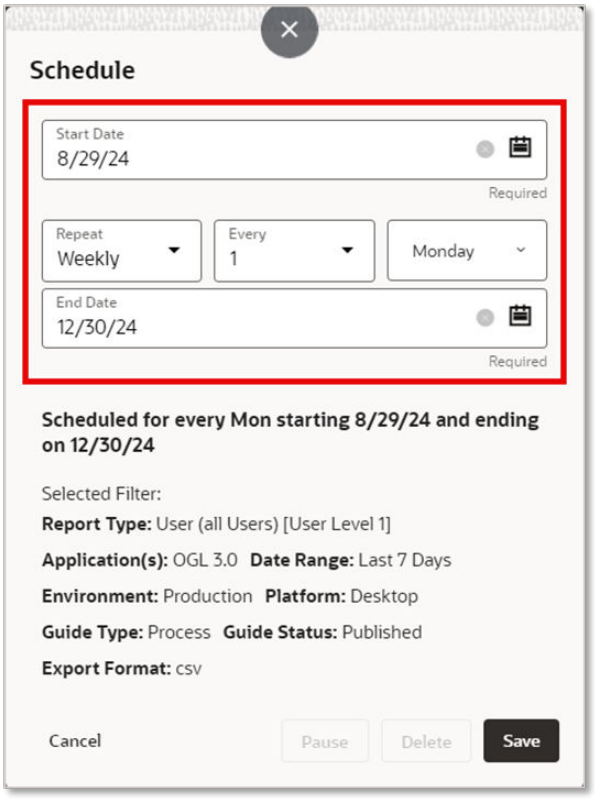


Example 2: Weekly report scheduled for every Monday ending on 12/30/24:

Data Filters applied**:** All Users, Last 7 days, Production env, Desktop platform, Process guides, CSV format.



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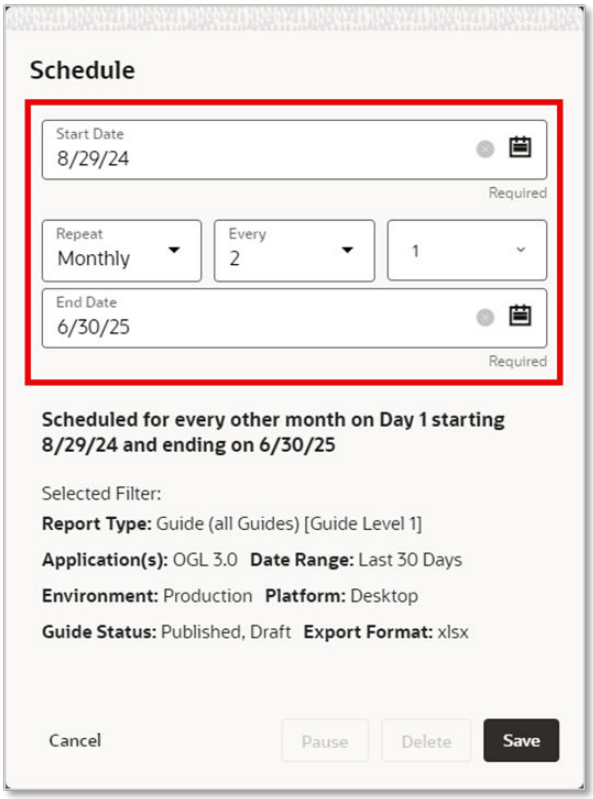
Example 3: Monthly report scheduled on the first day of every other month beginning 8/29/24 and ending on 6/3/2025.

Data Filters applied**:** All guides, Last 30 days, Production env, Desktop platform, Published and Draft status, Excel format.



Key considerations when using Schedule Email Report feature:

- Currently, only 1 scheduled report can be setup at a time, based on 1 set of filters and recurrence settings. To create another scheduled report, you will need to delete the first schedule and setup a new one. We will be looking at enhancements to this feature in future releases.
- Once a report is scheduled, you can **Pause** (Pause) or **Delete** (Delete) the report schedule at any time by selecting the appropriate button in the Schedule modal.
- The **Schedule** button in the Reports page will indicate the current status of a scheduled report.

Schedule ○ Black indicates that there is no report scheduled.

Schedule ● Green indicates that a report is currently **scheduled** and **Active.**

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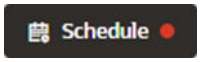

Red indicates that a report is currently **scheduled** and **Paused.**

Multiple Scheduled Email Reports

The report scheduling functionality allows console users to create and manage multiple OGL analytics reports with different filter criteria and provides the ability to add multiple email recipients to share scheduled reports with other console users.

OGL administrators can schedule recurring analytics reports in OGL and have them delivered directly to your inbox. Apply your preferred filters, set the frequency (daily, weekly, or monthly), and let the system do the rest. This feature supports multiple scheduled reports, helping you save time and stay on top of key metrics without manual effort. Easily pause, resume, or delete schedules anytime from the Schedule modal.

The Schedule Email Reports feature takes the hassle out of repetitive reporting tasks. Instead of manually applying filters and exporting data each time, users can automate recurring reports with just a few clicks. This not only saves time but also ensures that key insights are consistently delivered to the right people. Whether you're tracking performance trends, monitoring KPIs, or sharing updates with stakeholders, this feature helps teams stay aligned, informed, and proactive without the extra effort.

The Schedule Email Reports feature is built to make reporting effortless and impactful. Here's how it helps:

- **No more repetitive work -** set it once, and reports arrive automatically.
- **Always stay informed** - get the right insights at the right time, without logging in
- **Share with ease -** send reports to teammates or stakeholders in just a click.
- **Track what matters** - schedule reports with different filters to monitor multiple metrics.
- **Act faster** - consistent updates mean quicker, more confident decisions.

> **Note**
>
> **Role/Permission**: To use the Schedule Email Report feature, OGL console users must have the **Owner > Manage Users** role and permission in the User Management settings. Please consult with your OGL Owner Administrator to request this role/ permission, if needed.

Scheduling a Report

1. Login to the OGL Console.
2. Navigate to the **Reports.**
3. Apply the desired filters for the report you want to schedule and click **Schedule.**

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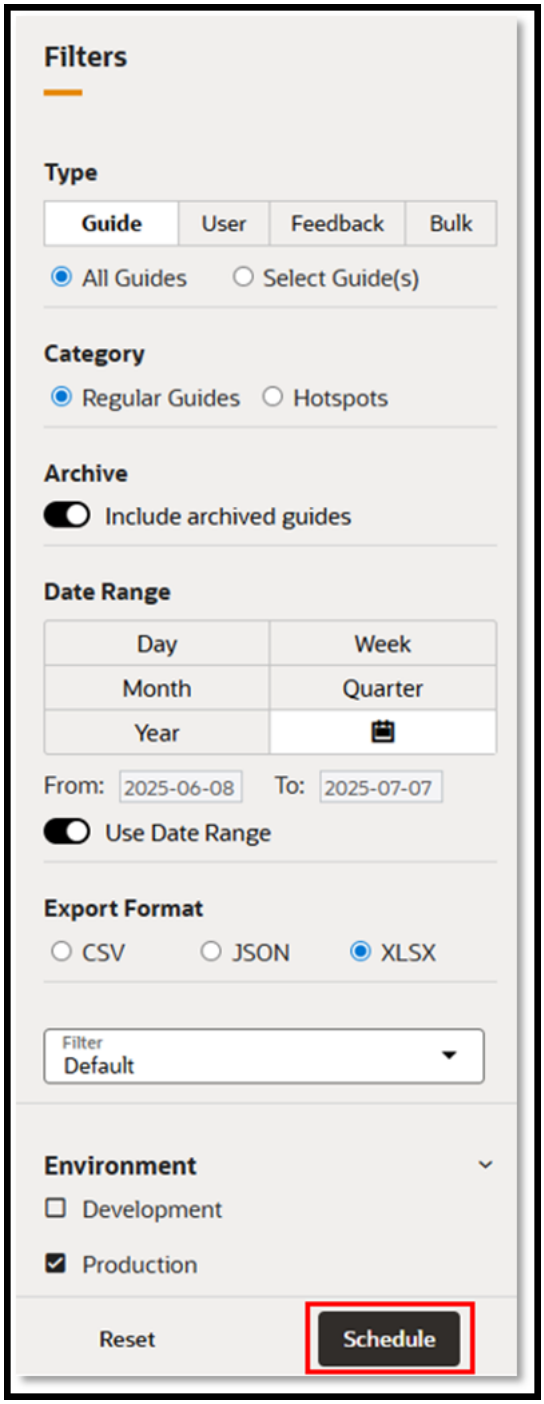

4. A **Schedule** modal will appear.
5. Enter a title for the report.
6. Select the **Start Date**.
7. Choose the recurrence pattern (Daily, Weekly, or Monthly), along with the time interval.
8. Set the **End Date** for when the schedule should stop.

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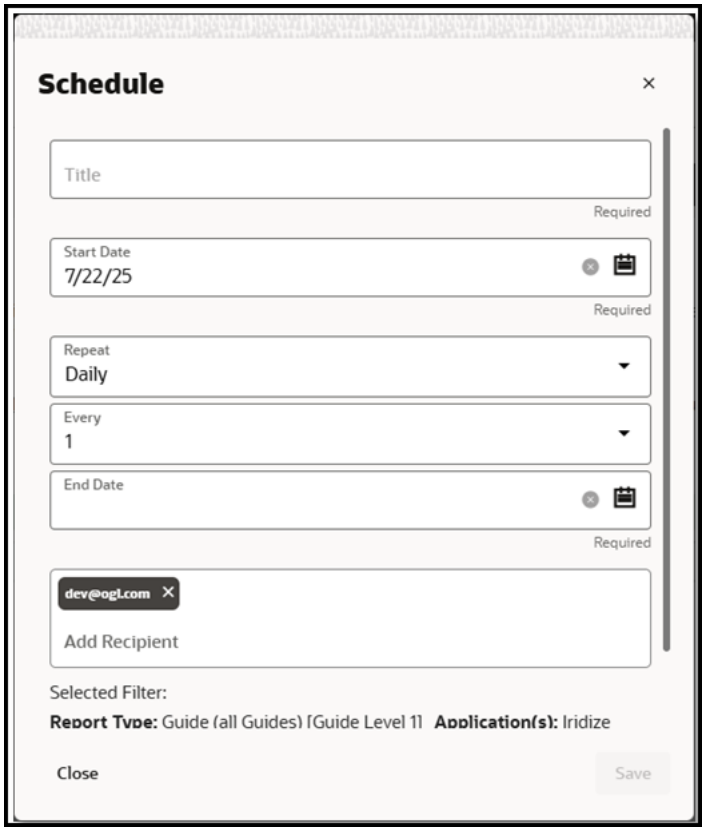

9. Add the recipients who should receive the email report.

> **Note**
>
> Report recipients must have an active OGL account on the APPID with at least a Viewer role and related permissions. To add additional report recipients, please consult with your OGL Owner Administrator to add users in **User Management**.

10. Ensure the selected filters in the modal match those applied on the Reports page.
11. Click **Save** to create the schedule.

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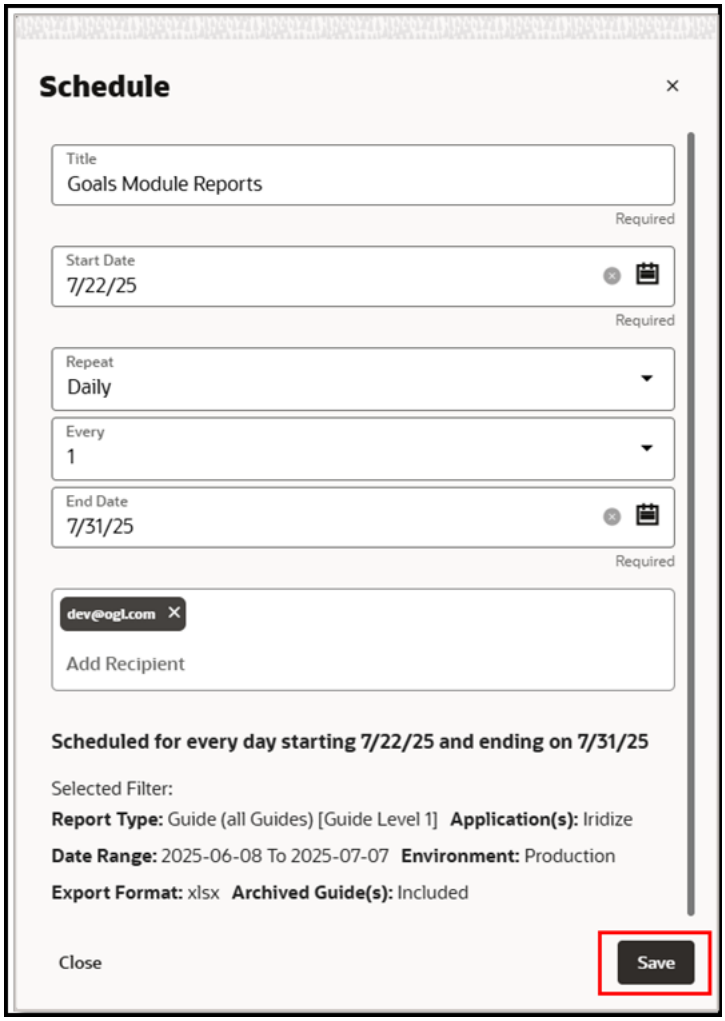

Viewing and Managing Schedules

To view all scheduled reports in the domain, click the Schedule button at the top of the Reports page.

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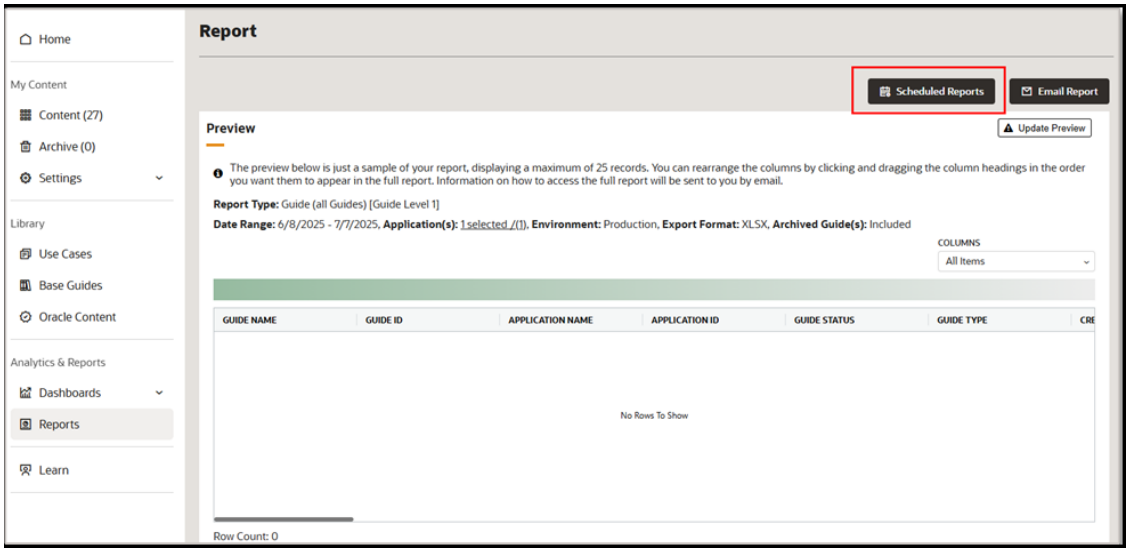

A modal will open showing the list of existing schedules.

From here, you can:

- Edit any existing schedule to update its details.
- Pause active schedules and resume them later.
- Delete schedules when they are no longer needed.

Schedule Status Definitions:

- **Active**: The schedule is currently running and sending reports based on the defined time interval.
- **Inactive**: The schedule is paused, and no emails will be sent until resumed.

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- **Expired:** The schedule has reached its end date and is no longer active.

Known Issues/Expected Behavior

- Scheduled reports can only be created for a single App ID. If multiple apps are selected, the Schedule button will be disabled.
- **Workaround** – Setup separate scheduled reports per APPID using the same report filters, parameters, and recipients.
- The Title field has been introduced in 25D. As a result, existing schedules will have an empty title by default. Users can update the title by accessing the Edit Schedule option.
- To add recipients to a schedule, the scheduler must have "Manage Users" permission.
- A maximum of 25 separate scheduled reports can be created per Account/Organization (APPID).

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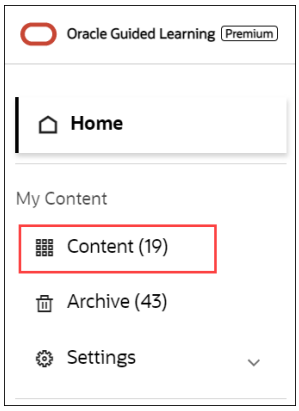
Exporting OGL Guide Content

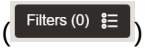
The Guided Learning content management interface provides a detailed overview of the content in the app ID. Choose from over 40 columns to achieve the view that best supports your content analysis.

Steps to export OGL guide content

1. On the home page go to the **Main Navigation Menu**, select **Content**.



My Content screen is displayed.

2. Use the **Filters** option (

) to filter the contents you want to view/manage. By default, all contents are selected.

> **Note**
>
> Exporting guide content using the Content Management interface may take longer depending upon the number of guides selected for the exporting and whether you choose to include screenshots. Prior to using the Content Management export feature, apply the desired filters (or language selection) in the OGL Console, then access the Content Management interface. The table will only display the filtered items.

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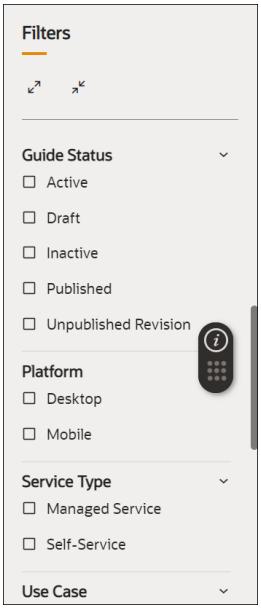
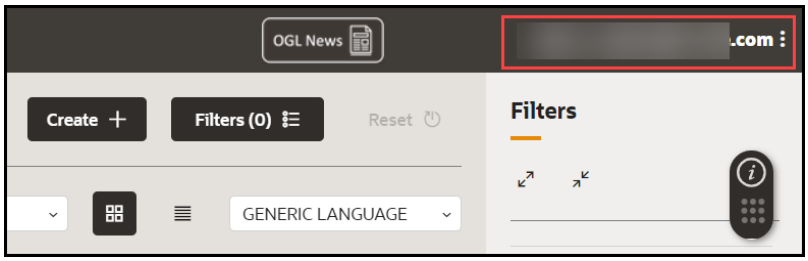
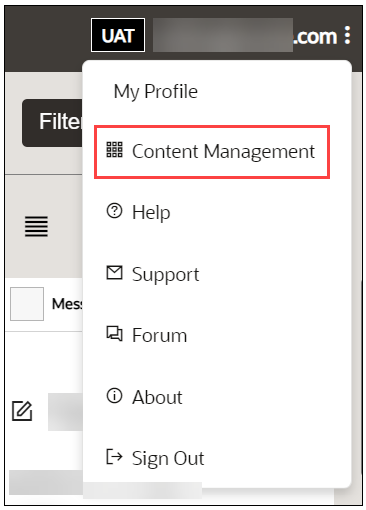


3. Select the **User Menu** in the top-right corner.



The drop-down menu is displayed.

4. Select **Content Management**.



5. The below interface is presented.

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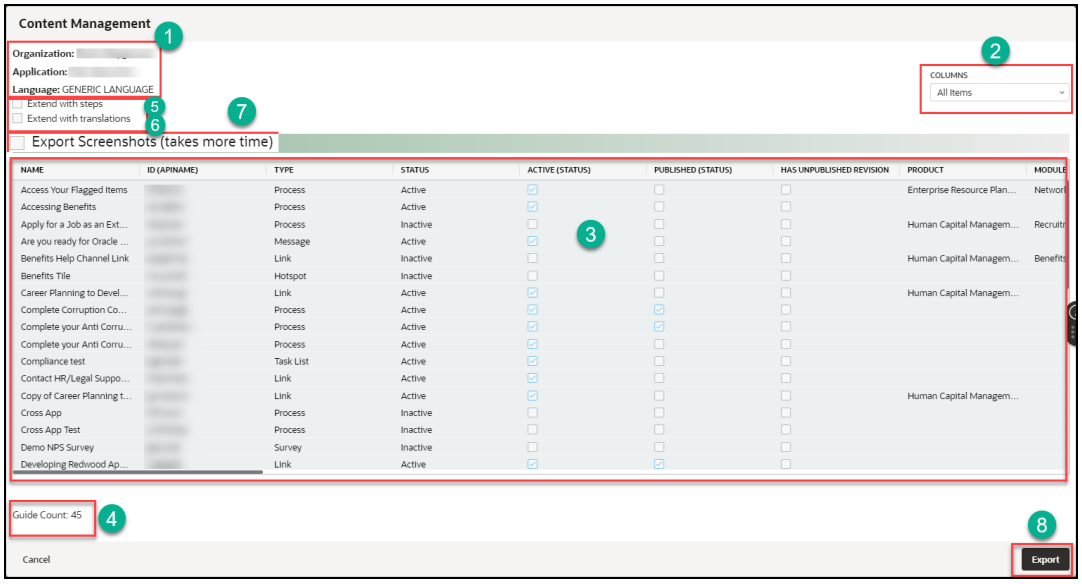
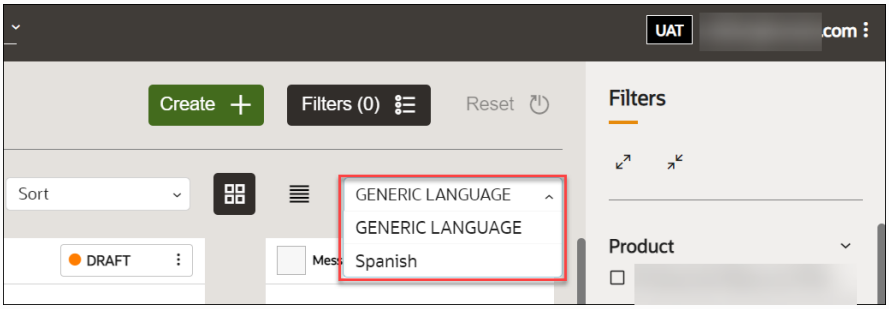


Legend	Description
1	This section provides the organization, application, and language information.
2	Columns
3	Additional Information
4	Guide Count
5	Extend with steps
6	Extend with translations
7	Export Screenshots (takes more time)
8	Export

Note

To analyze information in any of the available languages, select the language from the OGL Console, then access the Content Management interface.



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Legend	Description	Additional Information
2	Content	There are over 40 columns to support analysis of the content, this includes, step text, selector ID, item status, etc
3	Content Detail Table	This table lists all the contents that you filter. It also shows additional details like the API ID, content type, status, etc.

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Legend	DAdditional Information
4	GThis is the total guide
5	EEnable this setting to include each individual guide step as a separate line in the export file.
6	EEnable this setting to include all available multi-language versions of guides, where available.

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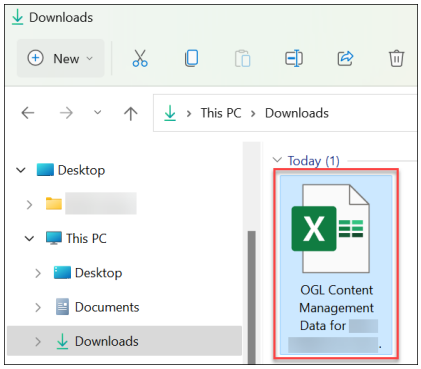
Legend	Additional Information
7	This option allows you to include screenshots of all selected guides in the export file. Export Screenshots **Note** Selecting this option may take more time to export.
8	Export allows you to export the Content Detail to a spreadsheet file for further analysis Export

6. Check the **Export Screenshots** option if you want to include screenshots in the report.
7. Select the **Export** button (Export).
   The browser now downloads the report in Excel format (.xlsx).



8. Open the downloaded file.
   The Excel report looks like this.

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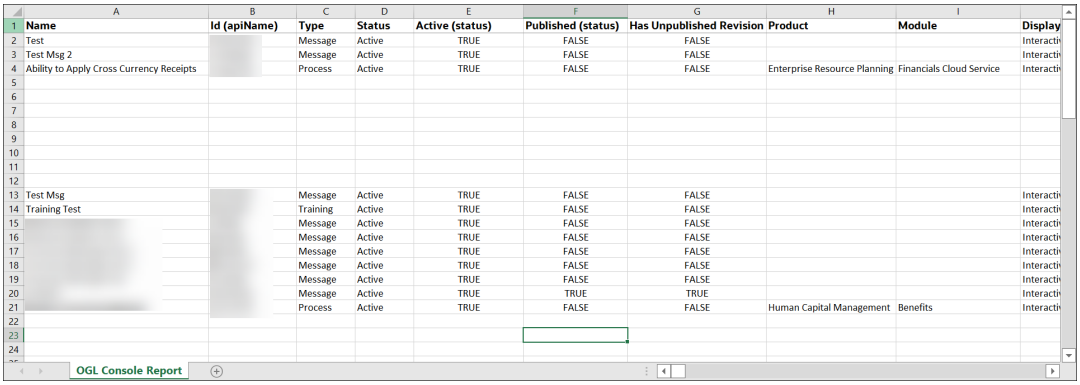
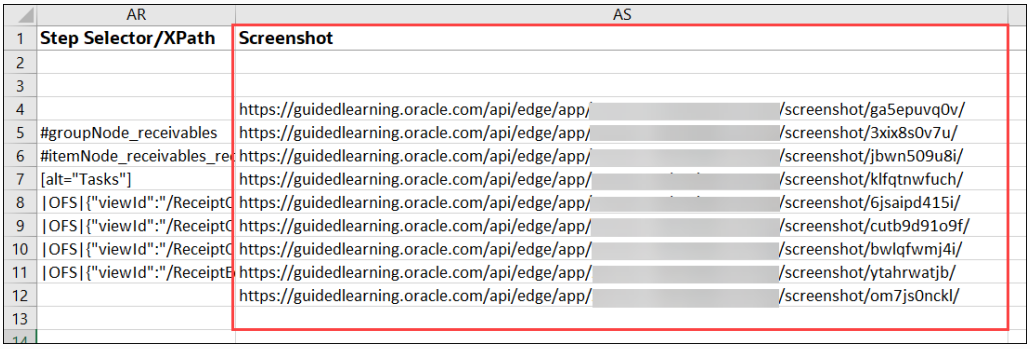


	A	B	C	D	E	F	G	H	I	
1	Name	Id (apiName)	Type	Status	Active (status)	Published (status)	Has Unpublished Revision	Product	Module	Display
2	Test		Message	Active	TRUE	FALSE	FALSE			Interacti
3	Test Msg 2		Message	Active	TRUE	FALSE	FALSE			Interacti
4	Ability to Apply Cross Currency Receipts		Process	Active	TRUE	FALSE	FALSE	Enterprise Resource Planning	Financials Cloud Service	Interacti
5										
6										
7										
8										
9										
10										
11										
12										
13	Test Msg		Message	Active	TRUE	FALSE	FALSE			Interacti
14	Training Test		Training	Active	TRUE	FALSE	FALSE			Interacti
15			Message	Active	TRUE	FALSE	FALSE			Interacti
16			Message	Active	TRUE	FALSE	FALSE			Interacti
17			Message	Active	TRUE	FALSE	FALSE			Interacti
18			Message	Active	TRUE	FALSE	FALSE			Interacti
19			Message	Active	TRUE	FALSE	FALSE			Interacti
20			Message	Active	TRUE	TRUE	TRUE			Interacti
21			Process	Active	TRUE	FALSE	FALSE	Human Capital Management	Benefits	Interacti
22										
23										
24										

OGL Console Report

Note

Known Issue with this feature: When exporting data in the Content Management interface with the "Export Screenshots" option unchecked, the export file will include a column labelled "Screenshot" (last column) that contains URLs. These URLs, when accessed, will open a file containing a very long text string that is not valuable to the user. This will be fixed in a future release in which the URLs listed in the Screenshot column will be replaced with a True/False value indicating whether or not a screenshot is present.



	AR	AS
1	Step Selector/XPath	Screenshot
2		
3		
4		https://guidedlearning.oracle.com/api/edge/app/ /screenshot/ga5epuvq0v/
5	#groupNode_receivables	https://guidedlearning.oracle.com/api/edge/app/ /screenshot/3xix8s0v7u/
6	#itemNode_receivables_re	https://guidedlearning.oracle.com/api/edge/app/ /screenshot/jbwn509u8i/
7	[alt="Tasks"]	https://guidedlearning.oracle.com/api/edge/app/ /screenshot/klfqtnwfuch/
8	|OFS|{"viewId":"/ReceiptC	https://guidedlearning.oracle.com/api/edge/app/ /screenshot/6jsaipd415i/
9	|OFS|{"viewId":"/ReceiptC	https://guidedlearning.oracle.com/api/edge/app/ /screenshot/cutb9d91o9f/
10	|OFS|{"viewId":"/ReceiptC	https://guidedlearning.oracle.com/api/edge/app/ /screenshot/bwlqfwmj4i/
11	|OFS|{"viewId":"/ReceiptB	https://guidedlearning.oracle.com/api/edge/app/ /screenshot/ytahrwatjb/
12		https://guidedlearning.oracle.com/api/edge/app/ /screenshot/om7js0nckl/
13		
14		

Exporting Base Guides and Use Case libraries

OGL console users can now utilize the Content Management function to export guides from the Base Guides and/or Use Cases libraries. This allows OGL developers and administrators to download an editable spreadsheet of all specified content items found in OGL's pre-built content libraries. This enhancement adds convenience when collaborating with SME's, business process owners, or other stakeholders on selecting and managing OGL base content.

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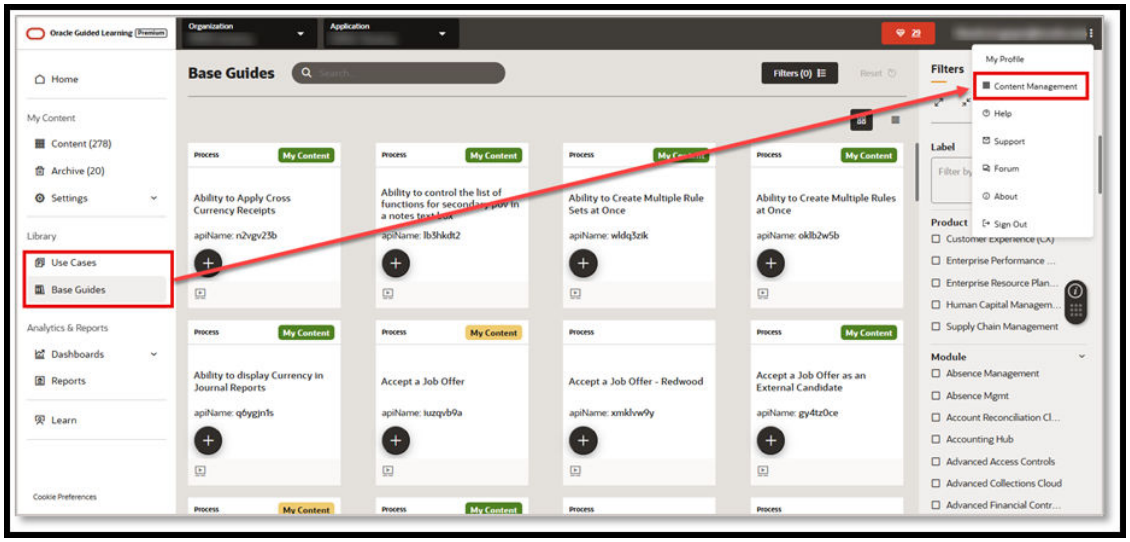
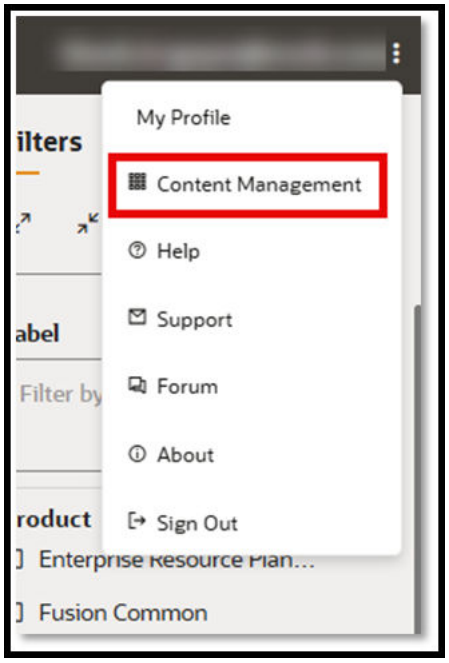


1. Select a content library from which to export (i.e., **Use Cases** or **Base Guides**).

> **Note**
>
> If desired, select any filters to narrow the list of content items prior to exporting. You can also apply filters within Excel or other business intelligence application after exporting the file.)

2. Select your username in the top-right corner of the console, then select **Content Management**.



3. The exported file will be downloaded as an Excel (.xlsx) file to your browser's specified Downloads folder.

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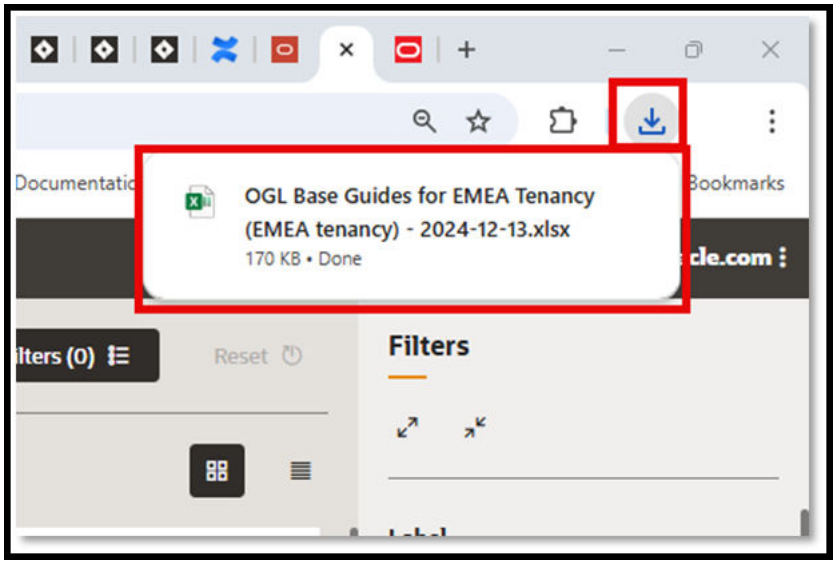

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Accessibility

OGL is designed with accessibility features to support assistive technologies, such as screen readers, as well as keyboard navigation. For more information about Oracle's commitment to accessibility, see http://oracle.com/accessibility.

Navigation & Keyboard Shortcuts

Users can navigate within OGL, transition between OGL and the host application, and access all relevant functionality using only the keyboard. Assistive technology is not required to use keyboard-only navigation. When a guide is running and a tip appears, the focus will be placed on the tip and then the Tab key may be used to navigate within the tip. Tabbing accesses the OGL Launcher as the last item on a page's Tab order. Using the keyboard shortcut below to open and close the Help Panel is a quicker method to access OGL.

Keyboard shortcuts enable user interface actions without a mouse. Following is a list of shortcuts available for OGL and their function:

Windows Keyboard Shortcut	Mac Keyboard Shortcut	Description
Alt+Ctrl+H	Control+Option+H	Opens and closes the Help Panel. When opened, use the Tab key to move the focus through the Help Panel items from left to right, top to bottom, and press Enter to select the desired choice.. (For launch guide/ Job Aid options) use arrow keys, then Enter.
Alt+Ctrl+G	Control+Option+G	Toggle the focus from the tip on the screen to the element to which it is associated. The same shortcut is used for toggling focus on the Feedback modal. Please see below for variations for Splash tips with the target element “body”: • For splash without overlay: Give focus to the first focusable element in the page • For splash with overlay: Screen reader will read " Unable to switch focus from splash tip with overlay"
Alt+Ctrl+L	Control+Option+L	Use this shortcut to open or close the language selection menu in the Help Panel.
Alt+Ctrl+M	Control+Option+M	For Legacy Help Panel only, this shortcut moves the focus to the first display group on the display group menu in the Help Panel.

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Windows Keyboard Shortcut	Mac Keyboard Shortcut	Description
Alt+Ctrl+T	Control+Option+T	Enter/Exit task list mode for autoloaded task lists. . Entering into task list mode will select the first task list on the screen and use the tab key to select any action items. Use '[' or ']' to switch between multiple task lists. When using some screen reader you may need to use 'Alt +]' or 'Alt +]' . When you launch a task list item, it automatically exits from task list mode so that other guide shortcuts should not be get blocked **Note** This shortcut is functional for autoloaded task lists only.
Alt+Ctrl+B	Control+Option+B	Toggle the pulsing of active beacons on the page on or off.
Alt+Ctrl+S	Control+Option+S	Use this shortcut to switch on/off hover mode. When this mode is switched on, the first hover tip in the page will appear. The “[“ (left bracket) or “]” (right bracket) will navigate the user around all the hover tips available on the page. (Smart tip and Beacon tip are considered hover tips). Use the same **Alt+Ctrl+S** shortcut to exit this mode. NB: Navigation keys vary from one screen reader (like JAWS) to another.
Alt+Ctrl+C	Control+Option+C	Toggle the focus from the element to smart tip it is associated with. the same shortcut can be used to navigate back to element.

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Windows Keyboard Shortcut	Mac Keyboard Shortcut	Description
Esc Key	Esc Key	If the focus is on the Help Panel, the Esc button will close the Help Panel and return focus to the host application. If the focus is on a tip, the Esc button will close the tip AND close the guide.

To disable or adjust keyboard shortcuts apply/embed the following scripts:

Action	Script to Embed
Disable the keyboard shortcut	*iridize.allowKeyboardShortcuts = false;*
Override the default keyboard shortcut	*iridize.hotKeys = {guideFocus : 'Alt+G', showOrHideBeacon : 'Ctrl+Alt+B' }*
Disable a specific keyboard shortcut (Set an empty string as per the example)	*iridize.hotKeys = {guideFocus : 'Alt+G', showOrHideBeacon : '' }*

Here is the complete list of hot key names which can be used in embed JS as explained above

Hotkey name	Default value(Windows)	Default Value (Mac)
helpWidget	Alt+Crtl+H	Control+Option+H
languageSelection	Alt+Ctrl+L	Control+Option+L
displayGroupFocus	Alt+Ctrl+M	Control+Option+M
guideFocus	Alt+Ctrl+G	Control+Option+G
hoverTipMode	Alt+Ctrl+S	Control+Option+S
taskList	Alt+Ctrl+T	Control+Option+T
showOrHideBeacon	Alt+Ctrl+B	Control+Option+B
currentSmartTip	Alt+Ctrl+C	Control+Option+C

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OGL for Non-Fusion Applications

Fusion Cloud applications have uniform object IDs, referred to as selector IDs in OGL. In a non-Fusion application, the selector IDs vary. Hence, the OGL JavaScript used for non-Fusion applications is slightly different to enable it to call the required functions from the OGL server.

OGL deployment for non-Fusion applications depends on the type of the application. For Fusion applications, OGL JavaScript is installed as a sandbox and published for users. However, for non-Fusion applications, you need to install non-Fusion Java script to enable OGL. Once installed, the OGL features remain the same for both Fusion and non-Fusion applications.

Here are some examples of non-Fusion applications where OGL has been deployed:

- Salesforce.com
- Oracle Peoplesoft applications
- Oracle Enterprise Planning Cloud
- Oracle CPQ Cloud
- Oracle JD Edwards EnterpriseOne

Please contact OGL Support for more details.

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Troubleshooting

NOT_SUPPORTED

Please note that the information related to troubleshooting has been moved to the OGL Knowledge Articles.

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Support

Cloud Customer Connect

Use Cloud Customer Connect as a place to connect with Oracle Guided Learning (OGL) product experts and other users. We encourage you to pose questions and share your knowledge, best practices, and experiences with OGL. Visit https://community.oracle.com/customerconnect/categories/oracle-guided-learning to start connecting.

Accessing Cloud Customer Connect from the OGL Console:

1. Select the **Username** 1 in the OGL Console
2. Select **Forum** 2 in the drop-down

To submit product ideas, visit the Oracle Guided Learning Idea Lab by visiting https://community.oracle.com/customerconnect/categories/idealab-oracle-guided-learning.

Guided Learning in the Console

Look out for the Guided Learning Widget in the OGL Console for resources, messages, and important information.

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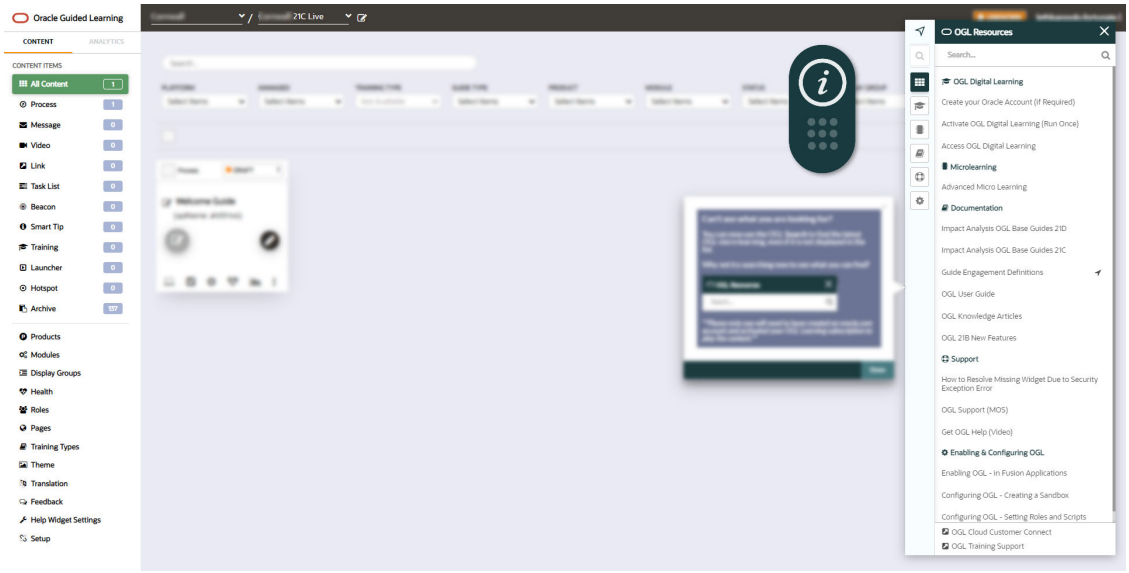

Learning Resources

Description	Link
Guided Learning User Guide	https://docs.oracle.com/en/education/oracle-university/guided-learning/user-guide/index.html
Guided Learning Knowledge Articles	https://docs.oracle.com/en/education/oracle-university/guided-learning/ogl-faq/
Guided Learning Training Subscription	https://learn.oracle.com/ols/home/oracle-guided-learning-training-subscription/75977

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