**Oracle® User Productivity Kit**

In-Application Support

E39077-01
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ORACLE®

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# Contents

# 1 In-Application Support Overview

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

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

- Help Integration: This method allows users to invoke context-sensitive in-application support content using the existing target application Help menu or Help link.

- SmartHelp: This is a toolbar button for browsers that end users may use to access context-sensitive in-application support content.

The mechanism for context-sensitivity used for target applications is known as ExactMatch. This technique allows the Player to display a list of content that is related to the end user's activity in the application. The relevancy of the content list is determined based on content items that contain exactly the same context information as recorded during content creation in the Developer.

The mechanism for context-sensitivity for browser-based non-target applications is known as SmartMatch. This technique uses statistical analysis to rank the most probable content items and generates a list of relevant content. This allows you to use the SmartHelp toolbar button to deploy context-sensitive in-application support for any browser-based application.

Finally, content created for non-target applications prior to the introduction of SmartMatch technology may still be deployed using the SmartHelp toolbar button for the browser without context-sensitivity. In this case, the outline displays all of the content items; however, the user may find the appropriate items using the Search feature or by browsing the content outline.

See the *Content Deployment* manual for more information about deploying Player content.

## 1.1 Plan for Deploying In-Application Support

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

- What deployment mechanism is most appropriate for your application, Help Integration with a target application or SmartHelp-based deployment?

- Who needs to be involved, what needs to be done, and when does it have to happen?

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

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

**Content Author**

- Create content in the Developer: While context for many applications will be automatically captured, it is recommended that you validate that context is being captured. You can check this by opening the topic in the Topic Editor and then opening the Context ID editor. If the Type field displays SmartMatch or ExactMatch, context was captured. If it displays NoMatch, no context was captured. In addition, while you

are recording a topic, there is an icon in the Recorder which shows context recognition status.

- Publish the content

- Give the published content to the web server administrator

**Web Server Administrator**

- Deploy the published content to a web server

- Provide the URL for the content to the application administrator and access to that directory so the application administrator can create the necessary configuration files.

**Application Administrator**

- Perform the configuration steps detailed in this guide for each application

- Receive the content URL from the web server administrator

- Perform help integration steps for URL configuration, if applicable

**Test User**

- Verify the published content appears from the application using the Help Menu Integration option or the SmartHelp button, as deployed

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

## 1.2 Target Application Configuration and Content Creation

For most target applications, application configuration can occur after and independently of content creation. There are two exceptions:

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

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

- PeopleSoft Enterprise: It is recommended that PeopleBooks be installed and configured before starting to record content.

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

# 2 Implement In-Application Support

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

Applications supported by:

**SmartHelp only**

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

**Help Integration only**

JD Edwards World
SAP GUI for Windows

**Either SmartHelp or Help Integration**

Agile CNM
Agile PLM
JD Edwards EnterpriseOne
Microsoft Dynamics CRM (version 4)
Oracle E-Business Suite (SmartHelp not supported for Oracle Java Forms)
Oracle (Hyperion) EPM
Oracle Fusion Applications
Oracle Knowledge Center
PeopleSoft
Primavera P6
Primavera Contracts Management
SAP GUI for HTML
Siebel CRM (On Premise)

Refer to the following information for the general steps to implement SmartHelp or help integration.

**Implement SmartHelp**

- Obtain content in the form of a Player package that an author created and published from the Developer.

- Configure content using the In-Application Support Player Configuration utility to set options for SmartHelp. See *Configure SmartHelp*.

- Deploy content to a web server.

- Install SmartHelp by deploying a link or pushing it to the end users. See *Install SmartHelp for Browser-based Applications*.

**Implement Help Integration**

- Obtain content in the form of a Player package that an author created and published from the Developer.

- Configure content using the In-Application Support Player Configuration utility to set options for help integration. See *Application-Specific Configuration Settings*.

- Deploy content on a Web server. Integrate Help into the target application by adjusting settings in the target application to launch the content. See the appropriate section for your application in *Integrate Help for Target Applications*.

Details about each step are in the following sections.

# 2.1 Obtain Content

Whether you are implementing help integration or SmartHelp, you need content that has been published to the Player format from the Developer. You can create and publish this content yourself, or you can use purchased content from your enterprise application vendor.

- Create and publish content – An author will use the Developer to create and record content, and then publish it to the Player format. This results in a folder structure containing a subfolder with the name PlayerPackage. It is this PlayerPackage folder that you need.

- Purchase content – Some enterprise application vendors sell pre-packaged content for their applications to help customers understand application functionality and configuration options. If you purchase content, you should receive a complete PlayerPackage.

# 2.2 Configure Content

Whether you are configuring content for SmartHelp or help integration or both, there are options you can set for context sensitivity and launch behavior.

The published content contains the In-Application Support Player Configuration utility to help you make the appropriate settings for your needs.

## 2.2.1 Use the In-Application Support Player Configuration Utility

As you use the In-Application Support Player Configuration utility to change and save settings, it creates a configuration file, writes the necessary lines of code, and saves it to the appropriate location.

If a target application supports help integration, there is a link specifically for that target application on the home page of the utility. There is also a link for SmartHelp options at the bottom of the page. The options on the SmartHelp page apply to all target applications that support SmartHelp, plus all browser-based applications since SmartHelp can be deployed for any application that runs in a browser, except ones that hide the browser toolbar.

**Note:** When you publish a Player package, only the target application folders that were recorded in the content are included. When you launch the utility, it will only display links to configure these applications. If you want to configure other target applications as well, you can copy other target application folders into the Player package. When the utility detects the additional folders, it will display links for those applications as well. All of the target application folders are stored in the Library in a package called hintconfig. It is in the same location as all of the other folders, that is, /System/Publishing/In-Application Support/<brand>.

As you make changes to the configuration settings and save them, the Activity column on the home page displays information about the date and time the change was made, and the name of the person who made them. You can add a name in the My name is field at the top of the

page. If you add your name, or pick your name from the dropdown list, it appears in the Activity column and also on Notes. You can add or change your name on any page. On the home page, you can also change the language of the interface.

🖱 To launch the In-Application Support Player Configuration utility (locally):

1.  Navigate to the folder containing the Player package.

2.  If you use Internet Explorer, launch the inappconfig.cmd file.

    or

    If you use Mozilla Firefox, launch the inappconfig_ff.cmd file.

**Use Notes**
You can add a note to each option as well as to the configuration file as a whole. These notes are saved as comments in the configuration file. You can use notes to add information about why a change to the configuration was made, and so on.

🖱 To add, edit, or delete a note:

1.  Launch the Configuration Utility and open a page for an application.

2.  To add a note for a field, click 📝 in the blue bar next to that field.

    or

    To add a note for the configuration file as a whole, click 📝 in the Notes box at the top of the page.

3.  Enter the text of the note and click **Ok**.

4.  To edit a note, click in the text box for the note, make your changes, and click **Ok**.

5.  To delete a note, click 📝 on the note.

**Save the Configuration File**
If you are launching Configuration Utility from the command file, the configuration file (odcustomurl.js) is saved directly to the appropriate folder within the content folder on the local drive.

**Note**: If you are not sure that the configuration file was saved correctly, you can retry the save. The Save Configuration page appears, displaying the location where the file was saved. If necessary, you can save the file manually, and then use the Check option to verify that the file is in the correct location.

🖱 To save the configuration file locally:

1.  Click **Save**. The Check Configuration page appears displaying the name of the file and the location where it was saved.

**Revert Settings**
At the bottom of each page of configuration settings, there is a Revert button. This option changes all of the settings on the page back to what they were the last time that the configuration was saved.

To revert the settings:

1. Click **Revert**.

**Reset to Defaults**
You can also set options back to the original settings. There is a Reset to Defaults button at the bottom of each page, which sets all the options on the page back to original defaults.

To reset to defaults:

1. To reset all of the fields on a page to the default, click the **Reset to Defaults** button at the bottom of the page.

## 2.2.2 SmartHelp

When you record browser-based application content, the content can be deployed with the SmartHelp toolbar button. The published content must be hosted on a web server and then SmartHelp can be installed from the hosted content location. The options on the SmartHelp configuration page allow you to configure SmartHelp for multiple applications and languages.

**Note:** If you have content created in different versions of the Developer, republish the content and SmartHelp from the same Developer version.

If you want to configure multiple applications, you must enter a URL for each application. For each URL, you must also configure a default language.

**SmartHelp and Languages**
You can configure SmartHelp to launch content in multiple languages. When you specify a language for the content at a specific URL, you can choose a base language and a language with a regional code, for example "en" for English, "en-us" for United States English, and "en-gb" for British English.

Users specify preferred languages for web pages, in order of preference, using the language settings in their web browser. When a user launches SmartHelp, it checks the language preference in the browser settings to find the appropriate content to launch for the application. It first tries to match the first preferred language, including the regional code. If there is none, it then looks for the preferred language with no regional code. If none is found, then it performs the same search for the second preferred language, and so on down the list. If no URL for content is found in any of the preferred languages, then it launches the content in the default language specified for the application.

Therefore, when you configure SmartHelp, you must always specify a default language for each application.

The SmartHelp Configuration page provides three options:

- **Application**: Provides a list of all supported applications. Choose the one that is appropriate for the content.

- **Language**: Provides a list of languages with region codes. Choose the one that is appropriate for the content.

- **URL**: Enter the URL to the root folder for the content, for example, http://<servername>/<content folder>. Do not enter a specific page, such as index.html.

⌐⊕ To configure SmartHelp options:

1.  Launch the Configuration Utility.

2.  Click the **SmartHelp** link.

3.  In the **Application** field, choose the application for which you want to specify a content location.

4.  In the **Language** field, choose the language for the content at the location.

5.  In the **URL** field, enter the URL to the application content folder.

6.  If you have more than one application for which you want to enable SmartHelp, click ✚ and enter another URL.

7.  Click **Save**.

    **Note:** To delete a row, click ✖ in the grey bar. You can also rearrange the rows using ▲ and ▼.

## 2.2.3 Target Application-Specific Configuration Settings

For target applications that support help integration, there are three possible feature configurations: Gateway, Multi-Language Content, and Advanced Options. Certain target applications have additional special options.

**Configure Gateway**
The options in this feature allow you to configure a gateway page that launches when a user clicks the Help link. You can configure the gateway page to give the user access to additional resources, such as the original help for the target application, additional Player packages, or a URL to another web site.

The gateway page has two options, tabs and links. The tabs appear across the top of the page, and you can specify the text for the tab as well as the URL to the content. The links appear in a menu on the last tab, and you can specify the link text as well as the target of the link. In most cases, it is your choice whether to use a tab or a link. There are a few exceptions. Some web pages cannot be embedded in a tab, so you must use a link to launch them. An entry for the target application help may appear in either the Tab or the Link Type list, depending on whether it can be embedded. In addition, the default player content (see *Default Content URL* below) will always appear as the first tab.

- **Default Player Tab Text**: The default Player is the one you launched the configuration utility from. This is the Player that launches if you do not configure the gateway page. In addition, if you configure any kind of content segmentation, such as multi-language support, it only applies to the default Player. With this option, you can determine the name on the tab for the default Player.

- **Tabs**: There are three options in the Tabs section.

    The first option is the Tab Text field. This allows you to specify the text you want to appear on the tab.

    The second option is the Type list, which has three choices. Use the Player with Context Sensitivity option to launch a Player with an outline filtered to the topics appropriate to the location in the target application from which it is launched. Use the Player option to launch any Player content. These two Player options are not subject to the language or other content segmentation that you may configure. Use the URL option to launch a website or page on the Internet or intranet. Depending on the target application you are configuring, an option may also appear to launch the target

application help.

**Note:** You should verify that there is valid content at the specified URL.

The third option is the URL field. Enter the URL to the root of the PlayerPackage folder (do not enter a specific page, such as index.html) or to the webpage.

In addition, you can use  and  to add and delete rows, and  and  to change the order of the tabs. You cannot change the order of the default player tab; it will always be the left most tab.

- **Remember Active Tab**: If this option is Yes, a cookie is placed on the user's system so that the gateway page launches with the tab that was active when the user last accessed it.

- **Link Menu Text**: This option allows you to change the name of the link menu text that appears on the gateway page.

- **Links**: There are three options in the Links section.

  The first option is the Link Text field. This allows you to specify the text you want for the item on the link menu.

  The second option is the Type list, which has three choices. Use the Player with Context Sensitivity option to launch a Player with an outline filtered to the topics appropriate to the location in the target application from which it is launched. Use the Player option to launch any Player content. These two Player options are not subject to the language or other content segmentation that you may configure. Use the URL option to launch a website or page on the Internet or intranet. Depending on the target application you are configuring, an option may also appear to launch the target application help.

  The third option is the URL field. Enter the URL to the root of the PlayerPackage folder (do not enter a specific page, such as index.html) or to the webpage.

  In addition, you can use  and  to add and delete rows, and  and  to change the order of the links.

**Configure Multi-Language Content**
The options in this feature allow you to configure the help to launch the appropriate content if you have developed content in multiple languages. This feature is only available for certain target applications.

**Note:** The Default Player tab in a tabbed gateway configuration honors language or any other segmentation.

- **Content URLs by Language**: This option has two fields, Language and Content URL. Use the Language list to select a language, and then enter the URL to the root of the player package for that language in the Content URL field. Do not append index.html or any other page. You can click  to add new rows as necessary to support all available languages, and click  to remove languages that you no longer need.

- **Default Content URL**: This is a URL to the content to be launched if the language is not defined in the Content URLs by Language list. For example, if you have defined English, Spanish, French, and German, and someone logs on in Italian, you can specify that the English content should be launched. The Player content being configured (for example, the one from which you launched the Configuration Utility) will be used if there is no language match.

**Configure Advanced Options**

The options in this feature allow you to control how the outline appears when the content is launched, and point to the content if the scripts folder is moved.

- **Outline Display**: If you have configured the content to launch with context-sensitivity, then the outline will only contain the items which are related to the task the user is performing in the target application. This is called applicable content, and it is the default setting. If you want the entire content outline to display instead, you can change this option to show all content. Users can switch between applicable and all content views in the Player.

**Special Options**

Certain target applications have special options. Most of these appear under Advanced options as necessary. If there are special options for the target application you are configuring, see the following sections for more information.

🖱 To configure application-specific options:

1. Launch the Configuration Utility.

2. Click the target application link that you want to configure.

3. Change settings as appropriate.

4. Save the configuration.

## 2.2.4 Oracle E-Business Suite Special Options

The following option is available for Oracle E-Business Suite:

- **Oracle Version**: Specify 11i or R12. This is needed for language segmentation to work properly.

## 2.2.5 SAP GUI for HTML and Windows Special Options

The following options are available for SAP GUI:

**Configure Content Segmentation and Multiple Languages**

In SAP, you can segment the content by GUI Type and SAP User Parameter in addition to language.

- **Segment Content By**: This option allows you to choose the type of segmentation. When you change this option, the fields in the Content URLs by Segment adjust accordingly.

- **GUI Type**: If you choose to segment content by GUI type, this field appears, allowing you to specify the GUI for each content URL.

- **SAP Param**: If you choose to segment content by SAP User Parameter, this field appears, allowing you to enter the value of the SAP user data for each content URL.

  **Note:** To use this parameter for segmentation, the parameter /GKOD/Y_ROLE must be created in each SAP user's Master Record (transaction SU01). The values in the Master Records and the values in the SAP Param field must match for the appropriate content to be returned.

**Additional Options**

- **Partial Context**: When you record content, context IDs are captured, which allows for context sensitivity. In SAP, these context IDs can consist of up to three components: the transaction code (T), the program name (P), and the screen number (S). You can enter the appropriate value to control which of these components are used to find applicable content. The default is to use all three components.

  **Note:** This option is only required if you have context sensitivity issues. Contact Technical Support before using it.

# 2.3 Deploy the Content on a Web Server

Once you have published and configured your content, copy all the content and place it in a location that is accessible by HTTP or HTTPS protocols. If you are implementing SmartHelp, you should give this URL to your end users so that they can install SmartHelp. If you are implementing help integration, you must use this URL when you configure the target application.

# 2.4 Integrate Help in Target Applications

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

## 2.4.1 Agile CNM

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

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

To configure Agile CNM:

1. Log in to the Agile CNM application.

2. Click the **Administration** link.

3. Click the **System Settings** link.

4. Click in the **Online Help URL** field.

5. Change the URL to point to the agilecnm_gateway.html file inside the Player Package.

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

6. Click **Save**.

## 2.4.2 Agile PLM

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

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

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

```
<AgileHelpUrl>http://<server>/<directory>/agile/hemi/agile_gateway.html</AgileH
elpUrl>
```

⌨ To configure Agile PLM:

1.  Log in to the Agile Java client application.

2.  Click the **Admin** tab.

3.  Expand the **Server Settings** item in the tree.

4.  Double-click the **Locations** item in the tree.

5.  Click the **Online Help Manuals URL** field.

6.  Enter the server and virtual directory where the published Player content is located, for example:

    http://<server_name>/<folder_name>/agile/hemi/agile_gateway.html

7.  Click the **Close** button.

8.  Click the **Yes** button.

## 2.4.3 JD Edwards EnterpriseOne

In the P98MOQUE file, update the Helps path to point to the **pste1_gateway.html** file in the **/psentone/hemi** folder. This path should be a URL path based on your virtual directory setup.

For example:
http://<server>/<dir>/psentone/hemi/pste1_gateway.html

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

**Note:** While setting up the Media Object Queues you may use Help Content as the Queue name and point to **pste1_gateway.html** file under ..\psentone\hemi in the published content folder as the On-Line and Off-Line Queue paths.

## 2.4.4 JD Edwards World

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

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

*   For the iSeries-i5 Installation:
    www/<HTTP server>, such as apachedft/htdocs/JWALK/JWALKAPP/A9100APP

*   For the Windows NT-2000-2003 Server Installation:
    C:\Inetpub\wwwroot\JWALKAPP\A9100APP or

> C:\Program Files\Apache Software
> Foundation\Apache2.2\htdocs\JWALKAPP\A9100APP

The Text File entries to be updated are:

- UPKVIEWI: Set this to Y to display the Context aware icon on the program menus.

- UPKVIEWH: Set this to Y to display the View Content Option from the Help Drop Down menu.

- UPKHELP: This displays text when hovering over the Context aware icon.

- UPKHELPOPT: This displays text for the option on the Help Drop Down menu.

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

  http://<server>/<virtual directory>/jdeworld/hemi/jdeworld_gateway.html?CTXEX=

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

## 2.4.5 Oracle E-Business Suite

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

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

**Enable Context Recognition in Oracle E-Business Suite 12.1.1 or Earlier**
To enable context recognition, you must either deploy a custom library or modify an existing one, and then modify the HELP_WEB_AGENT profile. The custom library is required for recording content only. It is not necessary for deployment of context-sensitive content from Oracle E-Business Suite. If you use the different systems for development (content creation) and production (deployment), then the custom library configuration is not necessary in the production environment. If you use the same system for development and production, then custom library only needs to be installed while the content is being recorded.

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

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

1. Launch the Oracle E-Business Suite application.

2. Click the **System Administrator** link.

3. Click the **Profile>System** link to launch the System Profile form.

4. Enter **%UPK%** in the **Profile** field.

5. Click the **Site** field and change the value to **Yes** to enable context recognition. This change is available to all users in the E-Business Suite application.

6. On the **File** menu, click **Save**.

7. On the **File** menu, click **Exit Oracle Applications** and click **OK**.

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

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

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

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

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

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

🖱 To deploy a custom library:

1. Back up your existing **CUSTOM.pll** to **CUSTOM.pll.orig**.

2. Locate the **ODPNCustomPLL.zip** file in the ORACLE folder where the Developer is installed and extract the **CUSTOM.pll** and **ODPN.pll files**. Copy them to the $AU_TOP/resource folder on the Oracle Applications server.

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

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

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

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

   Oracle 11.5.10 server:
   ifcmp60 module=ODPN.pll module_type=LIBRARY userid=apps/apps@<instance> compile_all=yes

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

   For Oracle E-Business Suite R12:
   frmcmp module=ODPN.pll module_type=library userid=apps/apps@<instance> compile_all=yes

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

compile_all=yes

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

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

## Modify an Existing Custom Library

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

To modify a custom library:

1. Back up your existing **CUSTOM.pll** to **CUSTOM.pll.orig**.

2. Copy the **CUSTOM.pll** from the $AU_TOP/resource folder on the Oracle Applications server to a client machine that has Oracle Forms Builder installed.

3. Copy the **APPCORE2.pll** from $AU_TOP/resource folder on the Oracle Applications server to a client machine that has Oracle Forms Builder installed. This should be the same folder you used for the previous step.

4. Locate the **ODPNCustomPLL.zip** file in the ORACLE folder where the Developer is installed and extract the **ODPN.pll** file. Copy it to the client machine into same folder as previous file copies.

5. Open **CUSTOM.pll** using Oracle Forms Builder and attach **ODPN.pll**. Place this file in the same folder on the client side as your CUSTOM.pll prior to the attachment.

6. Answer **Yes** when asked to remove directory path.

7. Add the following code to the Event procedure:

   gkod_event (event_name, 'SPECIAL7');

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

8. Ensure that no one is currently using Oracle Applications (Web Forms). Shut down the Oracle Forms Server service.

9. Copy the **CUSTOM.pll** and **ODPN.pll** files from the client to the $AU_TOP/resource folder on the Oracle Applications server.

10. Compile both the **ODPN.pll** and the **CUSTOM.pll** files using steps 5 and 6 in the previous section.

## Modify the HELP_WEB_AGENT Profile

You must modify the HELP_WEB_AGENT profile in Oracle to point to the oracle_gateway.html in the Player content deployed on the server.

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

Following is an example for 11i:

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

Following is an example for R12:

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

🖰 To modify the HELP_WEB_AGENT profile in Oracle E-Business Suite:

1. Sign on to the Oracle EBS Application via the web browser as an administrator.

2. Click the **System Administrator** link and locate the **System** Profile.

3. When the java form launches, enter **APPLICATIONS_HELP%** in the **Profile** field and click **Find**.

4. Enter or edit the URL with the path to the oracle_gateway.html.

   **Note:** For Oracle 11.5.10, include the location of the .dbc file in the URL string. Once you have completed your changes, stop and restart the Oracle Forms service.

5. For the profile change to take effect in the current session, exit from the Oracle application and sign in again.

6. Click **Help** in Oracle, and the Player launches.

## 2.4.6 Oracle (Hyperion) EPM

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

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

🖰 To configure the help menu:

1. Launch and log in to the Hyperion Workspace.

2. On the **Navigate** menu, choose **Administer**.

3. Click the **Workspace Server Settings** menu.

4. In the **URI to User Productivity Kit** field, enter the URL to the content location. The URL should consist of the web server name and the virtual directory where the content is located. For example, http://<servername>/<virtualdirectory>. You do not need to append any further information.

5. Click **OK** twice to close the Workspace Server Settings dialog box and save your settings.

6. Log off and on to the Hyperion Workspace to apply the URL change.

## 2.4.7 Oracle Fusion Applications

Fusion Applications can be configured to launch context-sensitive help through the Help menu. When a user clicks **User Productivity Kit** under the Help menu, the Player launches directly with an applicable list of topics based upon the application context.

There are two steps to enabling Fusion Applications for context-sensitive content development and playback:

- Enable context in Fusion Applications
- Configure Help Integration

### Enabling Context in Fusion Applications

The following must be added to web.xml for context to be enabled.

```
<context-param>
   <description>
   </description>
   <param-name>
      oracle.apps.upk.targetapp.context.ENABLE_UPK_CONTEXT_PROVIDER
   </param-name>
   <param-value>true</param-value>
</context-param>
```

**Note:** Context must be enabled in Fusion Applications prior to any content authoring sessions. This ensures the Developer/Recorder will automatically capture context during recording. A server reboot is NOT required when adding this through Enterprise Manager. However, the deployed application needs to be restarted through the WLS console. These steps must be repeated after each Fusion Apps patch is applied. Customers are advised to follow already established guidelines for uptaking Fusion Apps patches.

### Help Integration in Fusion Applications

The configuration for Help Integration is done within the Functional Setup Manager (FSM). By registering the enterprise application through FSM, you can configure the User Productivity Kit link to launch content in a context-sensitive manner. The launch URL from Fusion Applications is pre-defined to be as follows:

<protocol>://<host>:<port>/upkcontent

It is important that your content location adheres to the above mentioned pattern, for example:

http://content.mycompany.com:8080/upkcontent
(http://content.mycompany.com:8080/upkcontent)

In the Fusion Applications provisioning data for the context root value for the "upk" module is set to "upkcontent" – this value is automatically appended to the content location host/port information that you define in the steps below. While you may physically place your content anywhere on the server, you must map the "upkcontent" virtual directory at the root of your server so that the Player can be launched by navigating to:

<protocol>://<host>:<port>/upkcontent/index.html

For example:

http://content.mycompany.com:8080/upkcontent
(http://content.mycompany.com:8080/upkcontent)/index.html

The configuration of Fusion applications for HINT requires the use of a tool known as Functional Setup Manager (FSM). Proper security access is required. With proper security, the Register Enterprise Applications menu appears under the Topology Registration Section of

FSM. The steps below assume the necessary steps for context enablement have been completed. For additional information, please see Oracle Fusion Applications Post-Installation Guide for your release.

You must have access to the WLS Administrator security role as well as one of the other roles:

Application Implementation Administrator
Application Implementation Consultant
Application Administrator
Application Developer

To configure the Oracle Fusion Application for Help Menu integration:

1. Launch the Functional Setup Manager.

2. Click the **Register Enterprise Applications** link.

3. Click the **Add** button to add a new registration to the Fusion application. The application you are registering is Oracle User Productivity Kit.

4. Under the Basic Information section, configure your Enterprise Environment, Enterprise Application and Name of the registration.

5. Choose your **Enterprise Environment** from the list.

6. Search for the **Enterprise Application** using the **Search** menu item at the bottom of the list.

7. Search for **Oracle** in the dialog box and click the **Search** button.

8. In the **Name** list, click **Oracle User Productivity Kit** and click **OK.**

9. In the **Name** field in the Basic Information section, enter **Oracle User Productivity Kit** as the name for registration.

10. In the Server Details section, configure the **Server Protocol** you are using to launch your content. The Player supports both http and https protocols.

11. In the **External Server Host** field, enter the name of the server host used for external communications; for example, content.mycompany.com.

12. In the **External Server Port** field, enter the appropriate port, either http or https. The default port for http is 80 and 443 for https.

    **Note:** In the Associated Modules section, note that the value in the Context Root field is "upkcontent". This should be the name of the virtual directory where the content is located. This is a non-editable field.

13. Click the **Save and Close** button. The Oracle User Productivity Link will appear under the Help menu. Users must log out and log back in to Fusion to accept the changes.

## 2.4.8 Oracle Knowledge Center

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

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

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

- KCenter: The help for the main user interface.

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

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

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

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

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

## 2.4.9 PeopleSoft

The Player supports two methods of configuration for the Web Profile helpurl configuration, local or hosted PeopleBooks. To properly record context IDs in a PeopleSoft application, you must set the HelpURL field inside your active Web profile configuration to point to the pst8_gateway.html file, and append the context parameter string that makes up the URL.

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

**Local PeopleBooks configuration:**
http://<server>:<port>/<directory>/pst8/hemi/pst8_gateway.html?ContextID=%CONTEXT_ID%&LangCD=%LANG_CD%

**Hosted PeopleBooks/Universal Linking configuration:**
http://<server>:<port>/<directory>/pst8/hemi/pst8_gateway.html?id=%CONTEXT_ID%&ctx=<first ul value>&ctx=<second ul value>

**Note:** For additional information about hosted PeopleBooks, see the PeopleBooks Online Library at
http://docs.oracle.com/cd/E17566_01/epm91pbr0/eng/psbooks/psft_homepage.htm.

Use the Configuration Utility (inappconfig.cmd) to configure a link in the Player gateway page for PeopleBooks; for example, http://www.oracle.com/pls/topic/lookup.

## 2.4.10 Primavera Contracts Management

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

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

1. Launch the Primavera Administrator tool.

2. Expand the User Productivity Kit folder.

3. Change the **Enable User Productivity Kit** setting to **true**.

4. Enter the server and directory location on your web server in the **User Productivity Kit URL** setting.

5. Save the settings.

6. Restart the Weblogic web services.

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

## 2.4.11 Primavera P6

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

To configure the Tutorials link to launch your custom content:

1. Launch the **Administrator** tool.

2. Expand the **Primavera P6 Configuration** folder in the **Custom** folder.

3. Expand the **Application** folder and then the **Tutorials** folder.

4. Edit the **Enable Tutorials** field and change it to true, if necessary.

5. Edit the **Tutorials URL** field to point to the custom content location. You only need to specify the server and the virtual directory; for example, http://<server>/<virtual directory>.

6. Click **Save Changes**.

## 2.4.12 SAP GUI for Windows and SAP GUI for HTML

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

- Register an object in SAP Service Marketplace.

- Copy the transport files to the SAP server.

- Import the transport files into the SAP system.

- Customize the SAP Help menu.

- Edit ABAP code to customize the "help_start" function in SAP to launch the Player.

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

- Translate the Help menu, although this step is optional.

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

**Register an Object in the SAP Service Marketplace System**
An SAP Administrator or someone who has administrative rights for the target SAP installation in the SAP Marketplace must perform this procedure.

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

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

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

The details for the next steps are in the sections that follow. The procedures may vary, depending on your SAP version. Procedures for 4.6c and ECC6 are provided as examples.

## 2.4.12.1 Import the Transport Files

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

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

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

To import the transport files to an SAP version 4.6c or ECC6 server:

1.  Log on to SAP as a Basis administrator.

2.  In the Transaction Code field, enter **stms**.

3.  Click  (Enter).

4.  Click  (Import overview).

5.  Double-click the import queue of the target system.

6.  On the **Extras** menu, point to **Other requests** and choose **Add**.

7.  In the Transp. request field, enter nnnKxxxxx, where nnn and xxxxx match the name of the transport file that was unzipped.

8.  Click  (Continue).

9.  Click **Yes**.

10. On the **Queue** menu, choose **Close**.

11. On the **Queue** menu, choose **Start import**.

12. In the Target client field, enter the number of the appropriate client.

13. Click  (Continue).

14. Click **Yes**.

15. Click  (Refresh).

16. Click  (Exit) twice.

**Special Note for SAP Unicode-based Systems**
If your SAP System is Unicode-based, please apply the transport in the following manner via the command line.

Verify that your instance profile has the following parameter set: abap/unicode_check=on.

🖱 Apply the transport using the following procedure:

1.  Open a command line prompt.

2.  Type the following:

    tp addtobuffer nnnKxxxxxx <SID> pf=C:\usr\sap\trans\bin\TP_DOMAIN_<SID>.PFL.

    **Note:** C:\ should be replaced with the appropriate path, if necessary.

3.  Type the following:

    tp import nnnKxxxxxx <SID> -Dsetunicodeflag=true client<num>
    pf=C:\usr\sap\trans\bin\TP_DOMAIN_<SID>.PFL.

If your system is Unicode, refer to SAP Note 330267 before importing the content.

## 2.4.12.2 Customize the SAP Help Menu

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

🖱 To customize the SAP Help menu on a version 4.6c or ECC6 server:

1.  Log on to SAP as a user with developer rights.

2.  In the Transaction Code field, enter **se41**.

3.  Click  (Enter).

4.  In the Program field, enter **MENUSYST**.

5.  In the Status field, enter **MEN**.

6.  Click  **Change**.

7.  Click  (Continue) twice to respond to messages in the Menu Painter: Initial Screen box.

8.  Click **Maint. in orig. lang**.

9.  Click  (Continue).

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

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

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

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

14. Click ✓ (Continue).

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

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

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

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

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

20. Click ✓ (Continue).

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

22. Click ✓ (Continue).

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

24. Click ✓ **Copy**.

25. Click 🔲 (Activate).

26. Click 🗋 (Create request).

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

28. Click 💾 (save).

29. Click ✓ (Continue).

30. Click 🔙 twice.

### 2.4.12.3 Customize the HELP_START Function

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

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

🖱 To Customize the HELP_START function on a 4.6c server:

1. Log in to SAP with developer rights.

2. In the Transaction Code field, enter **se37**.

3. Click ✅ (Enter).

4. In the Function module field, enter **HELP_START**.

5. Click  **Change**.

6. Enter your user access key and the access key for the object that was registered in the SAP Service Marketplace system.

7. Click **Continue**.

8. Click  (Continue).

9. Click **Maint. in orig. lang**.

10. Click  (Find/Replace).

11. In the Find what field, enter **when 'GLOS'**.

12. Click **Find Next**.

13. Click **Cancel**.

14. Click in the workspace to position the insertion point before the when 'GLOS' statement.

15. Click  **Insert**.

16. Enter **OnDemand Include** and press ENTER twice to create two blank lines under the *OnDemand Include statement.

17. Click the first blank line you just created and enter **include /GKOD/Y_START_ONDEMAND.**

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

18. Click  (Check).

19. Click  (Activate).

20. Click  (Continue).

21. Click  (Exit).

22. Click  (Activate).

23. Click  (Continue).

24. Click  (Exit).

To Customize the HELP_START function on an ECC6 server:

1. Log in to SAP with developer rights.

2. In the Transaction Code field, enter **se37**.

3. Click  (Enter).

4. In the Function module field, enter **HELP_START**.

5. Click  **Change**.

6. Enter your user access key and the access key for the object that was registered in the SAP Service Marketplace system.

7. Click **Continue**.

8. Click  (Continue).

9. Click **Maint. in orig. lang**.

10. Click  (Find/Replace).

11. In the Find what field, enter **when 'GLOS'**.

12. Click **Find Next**.

13. Click **Cancel**.

14. Click in the workspace to position the insertion point before the when 'GLOS' statement.

15. Click  **Insert**.

16. Enter **OnDemand Include** and press **ENTER** twice to create two blank lines under the *OnDemand Include statement.

17. Click the first blank line you just created and enter **include /GKOD/Y_START_ONDEMAND.**

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

18. Click  (Check).

19. Click  (Activate).

20. Click  (Continue) twice.

21. Click  (Exit).

22. Click  (Activate).

23. Click  (Exit).

### 2.4.12.4 Configure the Gateway URL

In this process, you configure the help menu entry you created to point your deployed content. The content must be installed on a Web server to determine the correct URLs to enter into the system.

You can set up the URL to call Player content in any client, or you can set up client-dependent base URLs. When you enter a Default Base URL and select the Enabled option, the entry is

used to call Player content in any client by default. If you save the entry with the Enabled option deselected, the Default Base URL is not used in the system. If you do not want to use the Default Base URL, you must still enter an empty string in the table. If the entry is not defined, you will receive an error message.

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

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

To configure the Gateway URL on a 4.6c or an ECC6 server:

1. Log in to SAP as a user with developer rights.

2. In the Transaction Code field, enter **/n/GKOD/SS**.

3. Click (Enter).

4. Click **Default Base URL**.

5. In the Default Base URL field, enter the URL to the sap_gateway.html page in the content for SAP on the web server. This must be a fully-qualified URL containing the sap_gateway.html page.

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

   **Example:** //<webserver>/Player/front/hemi/sap_gateway.html.

6. Click the **Enabled** option.

7. Click (Save).

8. Click (Continue).

9. Click **Client Dependent Base URL**.

10. Click **Maintain**.

11. Click (Continue).

12. Click **New Entries**.

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

13. In the Client field in the first row of the table, enter a client number.

14. Click **Enabled**.

15. In the Base URL field in the first row of the table, enter the path to the SAP_gateway.html page in the content for SAP on the web server.

> **Note:** This URL can be different than the one above.

16. Click  (Save).

17. Click  (Exit) twice.

18. Click **Check Configuration**.

19. Click  (Exit).

### 2.4.12.5 Translate the Help Menu

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

To translate the Help menu on a 4.6c server:

1. Log in to SAP as a user with developer rights.

2. In the Transaction Code field, enter **se41**.

3. Click  (Enter).

4. In the Program field, enter **MENUSYST**.

5. In the Status field, enter **MEN**.

6. On the **Goto** menu, choose **Translation**.

7. Click the Target Language field and enter the language code.

8. Click  (Translate).

9. Click  (Find).

10. In the Find field, enter the text that you used for the menu entry that launches the Player.

11. Click  (Find).

12. Click the text that you want to translate.

13. Enter the menu text in the target language.

14. Click  (Save).

15. Click  (Exit) twice.

To translate the Help menu on an ECC6 server:

1. Log in to SAP as a user with developer rights.

2. In the Transaction Code field, enter **se41**.

3. Click  (Enter).

4. In the Program field, enter **MENUSYST**.

5. In the Status field, enter **MEN**.

6. On the **Goto** menu, choose **Translation**.

7. Click the Target Language field and enter the language code.

8. Click  (Translate).

9. Click  (Find Text).

10. In the **Find** field, enter the text that you used for the menu entry that launches the Player.

11. Click  (Copy).

12. Click  (Sequential).

13. Enter the menu text in the target language.

14. Click  (Save).

15. Click  (Exit).

16. Click  (Back).

17. Click  (Exit).

## 2.4.13 Siebel CRM (On Premise High Interactivity and Open UI Applications)

Content will be launched directly from the Contents link from the Siebel Help menu. It is also possible to create a link to the Player in the existing Siebel Help page.

An administrator needs to add the following MIME types to the Web server:

text/x-component

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

To set up help integration on the Siebel web server:

1. Go to the Siebel application server and find the …/SWEApp/Public/ (installation) folder.

2. Find the folder for the language of the content you recorded and locate the Help folder within it, then find and open the Siebhelp.css file and edit it as described in the next step.

3. Add the behavior:url command to the body section as indicated below:

```
body {
margin-top: 4px;
margin-bottom: 4px;
font-family: Verdana, Geneva, Arial, Helvetica, sans-serif;
font-size: 8pt;
```

```
        behavior:url(../hemi/odgateway.htc);
        -moz-binding: url(../hemi/odgateway.xml#odgateway.htc);
        }
```

4.  Save the Siebhelp.css file.

5.  Locate the **/hemi** folder under Siebel7 in the published content folder.

6.  Copy the **/hemi** folder and paste it in the language folder on the Siebel server.

    **Note:** Do not move the **/hemi** folder; be sure to copy it only. The folder must remain in the published content folder.

7.  Repeat this procedure for every language you want to configure.

**Note:** If you want the Contents link to open the Siebel Help page with the Player link in the header area, change the Show Siebel Help option in the Configuration Utility.

# 2.5 Install SmartHelp for Browser-based Applications

For browser-based applications, the SmartHelp toolbar button can be used to deploy in-application performance support. SmartHelp can be used for context-sensitive ExactMatch or SmartMatch content for various target and non-target applications.

The traditional Help Integration approach is recommended for deploying context-sensitive in-application performance support content for a single target application as it does not require the SmartHelp toolbar button to be distributed to end-user desktops. However, if content is being deployed for multiple browser-based target applications or for non-target applications, then SmartHelp may be a consistent way to deliver help for all browser-based applications.

SmartHelp is a toolbar button for Internet Explorer and Firefox browsers. Browser-based applications that suppress the browser's toolbar may not take advantage of the SmartHelp features. SmartMatch functionality for non-target applications (statistically relevant content items ranked in order to generate the list of applicable content items) is only available with the SmartHelp toolbar button.

It is possible to configure the same SmartHelp toolbar button to deploy multiple browser-based target applications as well as non-targeted applications. The end users will benefit from ExactMatch behavior when using the SmartHelp toolbar button for target applications and SmartMatch behavior when using the SmartHelp toolbar button for non-targeted browser-based applications.

There are two ways to deploy the SmartHelp toolbar button. One is to enable users to navigate to an html page which runs a script to install the button on their local workstation. The other is to have an administrator create a silent installer using the executable for a silent install.

## 2.5.1 Install SmartHelp for Microsoft Internet Explorer

An ActiveX control must be installed on the end-user system to enable the SmartHelp for Internet Explorer. A key feature of ActiveX controls is their simple "download and execute" deployment model.

**Note:** Refer to the Technical Specifications for a list of supported versions of Internet Explorer.

The user who installs, configures, and uninstalls SmartHelp must have administrator rights to the local computer. Medium or medium-low security is recommended for the published content. In the Security tab, Local Intranet and Trusted Sites have the recommended security levels. For SmartHelp to work properly, the following settings should be as follows:

- Download signed ActiveX controls: Enable or Prompt

- Run ActiveX controls and plug-ins: Enable

- Script ActiveX controls marked safe for scripting: Enable

**Note**: If Internet Explorer and the operating system have Protected Mode support, the content locations and applications used with SmartHelp must have the same Internet Explorer mode, either Protected or Unprotected.

Users can install SmartHelp by accessing the following page from Internet Explorer:

http://<server>/<content_directory>/smarthelpsetup.html

In Windows Operating systems at least Power User or higher (Administrator) privileges are necessary for installation. System administrators may need to modify permissions for users or applicable groups. It is recommended that the URL for SmartHelp is part of an Internet Explorer security zone that is equivalent to either Low or Medium-low pre-defined settings.

**Troubleshooting**
When the smarthelpsetup.html page displays an error, additional information is available by appending ?diagnosticmode to the URL. For example:

http://<server>/<content_directory>/smarthelpsetup.html?diagnosticmode

In most cases, after you restart the browser the new toolbar button will appear automatically. However, if the user has customized the Internet Explorer toolbar, the new button may not appear. In this case, the toolbar button is added to the choices in the Customize Toolbar dialog box, and it will appear if the toolbar is reset. For more information, see the article on the Microsoft Developer Network at http://msdn2.microsoft.com/en-us/library/Aa753588.aspx.

**Note for Internet Explorer 9:** When you install SmartHelp and then restart Internet Explorer, a message about the SmartHelp Helper appears. Select **Enable** and then restart Internet Explorer again to enable SmartHelp to work.

Depending on the version of Internet Explorer you are using, the entire toolbar may not display. The SmartHelp button will be added in the dropdown list area for more buttons.

**Upgrade SmartHelp**
If the published content on the server is refreshed or upgraded, the new content could contain a newer SmartHelp version with newer resources. The SmartHelp button from the previous version cannot load the newer content. For SmartHelp to upgrade itself, the user must launch the setup.

If SmartHelp does not work after a browser upgrade, the setup page can be launched to upgrade or reconfigure it.

**Uninstall from Internet Explorer**

1. Find the SmartHelp Helper bho (currently loaded add-ons) and disable it.

2. Restart the browser.

3. Find the SmartHelp activex (downloaded controls) and remove it.

4. Restart the browser.

## 2.5.2 Install SmartHelp for Mozilla Firefox

An administrator needs to add the following MIME types to the Web server before the SmartHelp button can be installed on Firefox:

.xpi application/x-xpinstall
.jar application/x-jar

The Web server must be rebooted after the MIME types are set.

**Note:** Refer to the Technical Specifications for a list of supported versions of Mozilla Firefox.

Users can install the toolbar button by accessing the following page from the Firefox browser:

http://<server>/<content_directory>/smarthelpsetup.html

When installation is complete, users must use the Restart Firefox button in the Add-ons dialog box or the button will not be configured properly. Users may then need to add the button to their toolbar with the Customize option.

To successfully install the SmartHelp button on Firefox, the location of the deployed content must be added to the add-on exception list.

**Upgrade SmartHelp**
If the published content on the server is refreshed or upgraded, the new content could contain a newer SmartHelp version with newer resources. The SmartHelp button from the previous version cannot load the newer content. For SmartHelp to upgrade itself, the user must launch the setup.

If SmartHelp does not work after a browser upgrade, the setup page can be launched to upgrade or reconfigure it.

**Uninstall from Firefox**
Please see Firefox documentation to remove the SmartHelp add-on.

## 2.5.3 Use the SmartHelp Installer

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

When SmartHelp is installed, it adds two entries on the Tools menu of the browser. One menu entry, SmartHelp, launches SmartHelp. The other, SmartHelp Options, opens a dialog box in which the user can change the hotkey to launch SmartHelp. The default hotkey is F9 at installation.

**Controlling the List of Plug-ins**
On the Configuration Options screen in the installer, the user can select from a list of plug-ins for all browsers installed on the local workstation. An administrator can use the /browser command line switch to limit the list to the plug-ins for specific browsers.

Examples:
`smarthelpsetup.exe /browser:IE` – only allows IE plug-ins
`smarthelpsetup.exe /browser:IE;FF` – allows both IE and FF plug-ins
`smarthelpsetup.exe /browser:all` – allows all browser plug-ins

**Note:** If the installation is being recorded for an unattended installation, the list displays all available plug-ins in the installation package, regardless of browsers installed on the machine or command line parameters used.  The command line parameter restraints will be respected during the running of an unattended installation.

## Upgrade or Downgrade Plugins

If newer versions of the available plug-ins are already installed, the corresponding older plug-in from the installation package being used will not be displayed, unless the /force command line parameter is used. For example, if version 2.0 of the Internet Explorer plug-in is already installed, and you are installing a package that only contains the 1.0 version of the Internet Explorer plug-in, that particular plug-in will not be displayed unless the /force command line parameter is used. The installed version of the plug-in will be removed.

A command line switch allows a downgrade install (/force). This installs the plug-ins if there is a version installed already, regardless of the installed version. This means that it could also upgrade existing plug-ins as well.

```
smarthelpsetup.exe /force
```

## Create a Response File for an Unattended Installation

You can use Push technology to distribute executable files for the setup to user desktops. You record response files which contain the pre-determined default settings, and then you can run the executable silently. If you deploy executable files in this manner, no interaction is necessary on the part of the user. The administrator can control the installation.

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

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

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

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

**Note:** When recording the installation options or when running an unattended installation, the installer allows all possible plug-in options to be selected for installation, regardless if a supported browser is on the machine. When attempting to install a non-supported plug-in, the installer logs an error message, but the installation continues.

## Unattended Installation

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

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

/s - runs the installer in silent mode

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

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

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

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

SmartHelp specific command line parameters can be used (/browser:[browser] and /force), but should come after all InstallShield standard command line parameters.  For example:

```
smarthelpsetup.exe /s /f1"<location of the response file>\smarthelpsetup.iss"
/browser:[browser] /force.
```

To use the SmartHelp installer, open a command prompt window and launch the smarthelpsetup.exe file located in the \stdhemi\smarthelp folder in the published Player package. You are then prompted to choose the language for the Installer, and the Welcome screen appears. During installation, you will proceed through these screens in the Install Wizard.

- **Configuration Options**: You can choose the appropriate plug-in from the list. The list is limited by the supported internet browsers installed on the local workstation.

- **Choose Destination Location**: You can accept the default target location, or click **Change** to specify a different one. The Destination Location is the target directory where the SmartHelp files will be installed.

- **Language Selection**: Choose the language for SmartHelp.

- **Initial Setup**: Enter the path to the location of the SmartHelp configuration, in the form of "http://<servername>/<virtual_directory>". This is the location of the root folder of a Player package on the web server.

- **Ready to Install**: The Installation Wizard is ready to install the software. Click **Back** to review or modify any settings.

- **Setup Status**: This screen appears while the plug-ins are being installed and configurations are made to the local workstation to enable SmartHelp.

- **Installshield Wizard Complete**: The plug-ins have been installed.

### 2.5.3.1 Uninstall Plugins

Plug-ins can be individually disabled in the selected browser using the appropriate Tools menu option for disabling the plug-ins.

The installer does not add an entry to the Add/Remove section of the Control Panel for SmartHelp.  Rather, the installer creates an uninstall batch file that can be run with the parameters for removing the individual plug-ins, or all of them at once. By default, running the batch file without parameters will remove all installed plug-in files, registry entries, and so on. The same result can be accomplished by passing "all" in the command line.

Examples:
uninstall.bat all – removes all plug-ins
uninstall.bat SmartHelp_for_Internet_Explorer - removes the Internet Explorer plug-in
uninstall.bat SmartHelp_for_Firefox – removes the Firefox plug-in only