



Agile PLM UPK

Agile Help Menu Integration Guide

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CONTENTS

Agile Help Menu Integration Guide	1
Oracle Copyright	ii
Overview of Help Menu Integration	1
Plan for Deploying In-Application Support	1
Overview of Help Menu Integration	2
Who Needs to be Involved?	2
When Does it Have to Happen?	2
What Needs to be Done?	2
Agile Help Menu Integration	3
Configure Context-Sensitive Help	3
Launch a Gateway Page	3

Preface

The Agile PLM documentation set includes Adobe® Acrobat PDF files. The [Oracle Technology Network \(OTN\) Web site](http://www.oracle.com/technology/documentation/agile.html) <http://www.oracle.com/technology/documentation/agile.html> contains the latest versions of the Agile PLM PDF files. You can view or download these manuals from the Web site, or you can ask your Agile administrator if there is an Agile PLM Documentation folder available on your network from which you can access the Agile PLM documentation (PDF) files.

Note To read the PDF files, you must use the free Adobe Acrobat Reader version 7.0 or later. This program can be downloaded from the [Adobe Web site](http://www.adobe.com) <http://www.adobe.com>.

The [Oracle Technology Network \(OTN\) Web site](http://www.oracle.com/technology/documentation/agile.html) <http://www.oracle.com/technology/documentation/agile.html> can be accessed through **Help > Manuals** in both Agile Web Client and Agile Java Client. If you need additional assistance or information, please contact [support](http://www.oracle.com/agile/support.html) <http://www.oracle.com/agile/support.html> (<http://www.oracle.com/agile/support.html>) for assistance.

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Readme

Any last-minute information about Agile PLM can be found in the Readme file on the [Oracle Technology Network \(OTN\) Web site](http://www.oracle.com/technology/documentation/agile.html) <http://www.oracle.com/technology/documentation/agile.html>

Agile Training Aids

Go to the [Oracle University Web page](http://www.oracle.com/education/chooser/selectcountry_new.html) http://www.oracle.com/education/chooser/selectcountry_new.html for more information on Agile Training offerings.

Accessibility of Code Examples in Documentation

Screen readers may not always correctly read the code examples in this document. The conventions for writing code require that closing braces should appear on an otherwise empty line; however, some screen readers may not always read a line of text that consists solely of a bracket or brace.

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Overview of Help Menu Integration

The Player deployment format from the Developer is not only useful in various training & educational initiatives; this output is also designed to provide in-application performance support for the end users.

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

1. Help Menu Integration - This method allows the target application end users to invoke context-sensitive in-application performance support material using the application's existing Help menu.
2. SmartHelp - This is a toolbar button for browsers that a target application end user may use to invoke context-sensitive in-application performance support material.

The mechanism for context-sensitivity for target applications is known as ExactMatch. This technique allows the Player to display a list of content material 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.

For browser-based non-target applications, the SmartHelp toolbar button can still be used to deploy context sensitive in-application performance support; however, there is a difference in how the applicable list is generated. Unlike ExactMatch where the recorded context information is matched exactly with the end user's context in the application, a statistical analysis is used to rank the most probable content items in order to generate the list of applicable content items. This method of generating the applicable list is called SmartMatch.

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 in a non-context sensitive manner. In this case, the Player displays all of the content items; however, the user may find the appropriate items using the Search feature or by browsing the content hierarchy.

Note: Please refer to the Help Menu Integration guide for each target application for specific instructions on Help Menu Integration as well as SmartHelp based content deployment.

Plan for Deploying In-Application Support

Once your organization decides to deploy content for in-application performance support, some of the fundamental questions that need to be addressed are:

1. What deployment mechanism is most appropriate for your organization, Help Menu Integration with a target application or SmartHelp based deployment?
2. Who needs to be involved?
3. When does it have to happen?
4. What needs to be done?

Understanding the answers to these questions will give your organization the information it

needs to implement help menu integration and context sensitive help successfully.

Overview of Help Menu Integration

Who Needs to be Involved?

A few roles across typical organizational boundaries are needed.

- Content Developer
- Web Server Administrator
- Application Administrator
- Test User

When Does it Have to Happen?

For some target applications, steps must be taken before production recording begins in order to support context sensitive help. For most applications, application configuration can occur after and independently of production recording. If your organization wants context sensitive help, always check that context is being captured while recording.

Note: Please refer to the Help Menu Integration guide for each target application for specific instructions about Help Menu Integration as well as SmartHelp based content deployment.

What Needs to be Done?

These are the tasks each role needs to complete to successfully deploy in-application performance support content.

Content Developer

- Create content in the Developer - While ExactMatch information for target applications and SmartMatch information for browser-based non-target applications will be automatically captured, it is recommended to validate that context is being captured.
- Publish the player package
- Give the published player package to the web server administrator

Web Server Administrator

- Deploy the published player package to a web server
- Provide the URL for the published player package to the application administrator

Application Administrator

- Perform the configuration steps detailed in the Help Menu Integration guide for each application
- Receive the player package URL from the web server administrator
- Perform the Help Menu Integration guide steps for URL configuration

Test User

- Verify the published player package 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 Player launches with an appropriate list of applicable topics.

Note: Please refer to the appropriate Help Menu Integration guide for specific instructions about Help Menu Integration as well as SmartHelp based content deployment.
Agile Help Menu Integration


Chapter 2

Agile Help Menu Integration

The Agile PLM application can be configured to launch context-sensitive Player 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 documentation.

Configure Context-Sensitive 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.

 To configure the Agile PLM application:

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://localhost/upkcontent`". Only enter the server name and virtual directory; the rest of the URL will be added automatically.
7. Click the **Close** button.
8. Click the **Yes** button.

Launch a Gateway Page

If you want the user to have a choice between the context-sensitive Player help and the Agile documentation, you must configure the supporting java script file.

When you configure the web client, a gateway page appears when the user clicks the Help button. This gateway page has links to both the Player help and the Agile help documentation.



To configure Agile PLM to launch a gateway page:

1. In the agile\hemi folder of the published Player content , copy the odcontenturl.js file and rename it to odcustomurl.js.
2. Open the odcustomurl.js file with Notepad or any text editor.
3. Define the Gkod.Variables.OD_DEFAULT_URL variable to point to the location of the content.
4. Define the Gkod.Variables.OD_APPLICATIONHELP.URL variable to "http://www.oracle.com/technology/documentation/agile.html".
5. Save and close the file.