



MANUAL | Customer
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SAP Companion Authoring Guide

THE BEST RUN 

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1 Introduction

The editing of SAP Companion content can be done using the following SAP Enable Now components:



SAP Companion - Edit Mode

SAP Companion content can be edited in the web editor of SAP Companion.



Manager

You can create and edit SAP Companion projects in the web editor of the Manager. You also can create content for the learning section.



Producer

You can create and edit SAP Companion projects in the project editor of the Producer. You also can create content for the learning section.

2 Editing Content in SAP Companion



You can create and edit your SAP Companion content directly in your application. The SAP Companion user interface provides functions for editing tiles of a context help as well as steps of a guided tour. The changes are saved to the connected Manager workarea.

i Note

Editing with the web-based editor is only possible with the **extended content scenario** and the **custom content scenario**. Make sure that your SAP Companion is connected to an SAP Enable Now Manager.

2.1 Edit Mode and Web-Based Editor

To edit content in a respective application, you have to start SAP Companion in edit mode. The edit mode provides a web-based editor.

Prerequisites

These are the prerequisites for editing content:

- The edit mode has been activated for SAP Companion.
- Authors have the author role assigned in the Manager with respective permissions.
- The write permissions for the SAP Companion content are available in the Manager.

Starting the Edit Mode



To create and edit content, start SAP Companion using the question mark icon and select the [Enter / Leave Edit Mode](#) button within the help panel to start the edit mode.

Editing Content in Web-Based Editor

You can edit content in the web-based editor. The editor is integrated with the SAP Companion framework - no client or additional frontend is required. You can edit existing content and create new content for context help and guided tours.

To open the editor, select a tile or a tour step in the help panel. In the opened menu, select [Edit...](#)

i Note

To avoid errors while editing content, open the edit mode of SAP Companion in one browser tab only. Do not open the edit mode in different tabs.

2.2 Customizing the SAP Standard Content

Customizing can be done in the web-based editor of SAP Companion. Bear the following in mind:

i Note

Make sure that SAP Enable Now Manager is configured for your **SAP system**. See also the chapters for setting up Manager as content server.

- When you customize the SAP standard content, SAP Enable Now creates a copy of that content.
- The standard content remains on the SAP Content Server, while the copy of the custom content is saved in the Manager. Customized content can be reverted again to the SAP standard content at any time.
 - **Context Help**
A copy is created on tile level. This means that each tile can be edited separately.
 - **Guided Tour**
A copy is created of the complete guided tour. You can edit each guided tour step afterwards.

2.2.1 Editing Options

You can customize the SAP standard content. The default content will remain on the SAP server. Your changes are saved in the Manager and will be displayed in SAP Companion.


Changing and adding content

You can change the standard content to show users your required information. You can also extend the standard content by adding content.

See the *Context Help Tiles* and *Guided Tours* chapters for further information about editing and adding content.

Hiding the SAP standard content

You can prevent the display of a tile by selecting *Hide Tile*. Use the *Show Tile* button, to show the tile again.

To show or hide a guided tour, open a guided tour, and select *Show / Hide Options*  -> *Hide Tour* or *Show Tour*.

Reverting the SAP standard content

The SAP standard content is stored on the SAP server and will not be affected by your changes. This allows you to revert your changes to the default status.

In *Edit Mode*, you can revert the changes by selecting *Revert to Original*. A changed tile is greyed out and highlighted with a border. By selecting *Revert all to Original*, you can revert the changes for all tiles. Your changes will be deleted from the SAP Companion content in the Manager.

i Note

Bear in mind that reverted content will be removed from the SAP Companion projects.

Versioning of the SAP standard content

The SAP standard content is connected to the version of the specific application. If the application has been updated, you have to change the version number in the context properties of your SAP Companion projects. Otherwise, the SAP standard content will be shown again.

See also *Context Properties of Content Objects*.

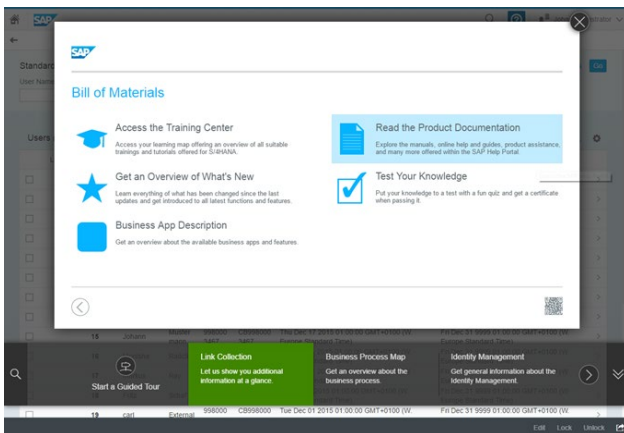
2.2.2 Delivering Further Content

Furthermore, any knowledge material, for example, created with SAP Enable Now (such as process tutorials or interactive courseware, PDFs) can be integrated easily into SAP Companion to be delivered directly from within the application and in the right context. The linked materials will be represented within an additional window on top of the current screen or can be opened in a new browser window.

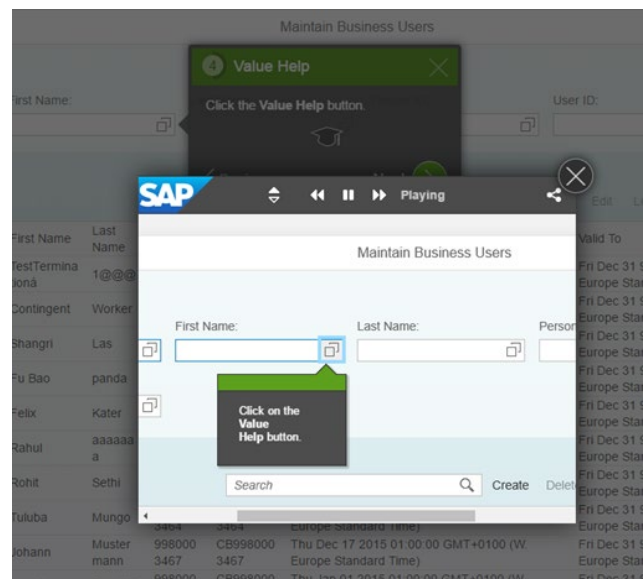
Further content can be inserted by using a *Link Tile*.

Examples

Link Overview



Process Tutorial



2.3 Context Help Tiles

For the context help of your app, you can add new tiles and edit available tiles.

SAP Companion has the following tile types:



Help Tile:

Shows a tile in the help panel that opens a bubble and shows a hotspot on the screen.



Link Tile:

Shows a tile in the help panel that opens an external link.

For each of the tile types you can choose an icon. This icon will be shown before the tile title in the help panel. See the chapter *Help Tiles Icon Styles* of this guide for more details.

2.3.1 Help Tiles Icon Styles

The following icons can be used in front of a help tile title. They are valid for both Help Tiles and Link Tiles.

Icon	Description
No Icon	No Icon
	What's This App
	Link
	Video
	Prerequisites
	FAQ
	PDF
	External
	Support

2.3.2 Adding a Tile



Training available

Adding and editing a *Tile* is available as interactive training in the SAP Enable Now Info Center.

[Enable Now](#)



Training available

Adding and editing a *Link Tile* is available as interactive training in the SAP Enable Now Info Center.

[Enable Now](#)



To add a tile to a context help, proceed as follows:

Note

If no project is available, a new SAP Companion project is created in the Manager workarea. The project is added in the *Unsorted* group. You can move it into your content group.

Adding a tile


Add a tile as follows:

1. Select Help Topics  to open the *Help Topics* view.
2. Select Add... .
A menu opens.
3. Select one of the following menu entries:
 - *Add Help Tile*
 - *Add Link Tile*
4. The editing dialog box opens.
5. In the *Text* tab, enter the required title, summary text and help text for the bubble.
6. For *Link Tiles* go to the *Link* tab and enter the URL there.
7. Select *Apply*.

The *Help Tile*  or *Link Tile*  is added to the help panel.

Assigning a hotspot

Assign a hotspot as follows:

1. Select a *Help Tile*  in the help panel.
A menu opens.
2. Select *Assign Hotspot*.
SAP Companion changes to selection mode.
3. Select a control or position on the screen.
The editing dialog box opens.
4. Select the *Appearance* tab.

5. The tab shows the settings available for the tile, hotspot, and bubble.
Configure the hotspot.
You will find further information in the *Hotspot Styles* chapter.
6. Select *Apply*.

The dialog box closes, and the hotspot is added to the screen.

i Note




When you assign a hotspot, SAP Companion displays a border around the hovered control or area on the app. Only stable elements can be reliably displayed during playback.

For further information see the *Recognition Indicators for Help Elements* chapter.

2.3.3 Editing the Content

You can edit the content of a tile in the *Edit Content* dialog box.









Open the dialog box as follows:

1. Select *Help Topics*  to open the *Help Topics* view.
2. Select a *Help Tile*  or a *Link Tile*  in the help panel.
A menu is opened.
3. Select *Edit...*

The editing dialog box is opened.

Text

In the *Text* tab, you can edit any textual contents of a tile. There are the following parameters:

- *Tile Title:*
Contains the title of the bubble and the help panel tile.
- *Summary Text:*
Contains the text to be displayed in a tile of the help panel.
- *Bubble Text (Help Tile):*
Contains the text of the bubble. You can edit and format the text with the following formatting functions:
 - **B** *Bold*, */ Italic*, U *Underline*
 -  *Remove Formatting*
 -  *Left*,  *Center*,  *Right*
 - *Paragraph Styles*
 -  *Bullets*,  *Numbering*
 -  *Indent*,  *Outdent*
 - *Insert Placeholder*
 - *Insert Link*
 - *Free Link*
 - *App Navigation Link*

Use this option to add navigation to other applications. This makes it possible to lead users directly to a desired app that is necessary for a process. Such links cannot be opened in preview mode.

Example: to open the *Display Customer Balances* app in SAP S/4HANA, use the app navigation link in the following format: **#Customer-displayBalance**

- *API Command*

You can use SAP Companion Actions (API Commands) links to control SAP Companion from the bubbles. For example, you can start a guided tour from a context help bubble to explain specific processes. See the list of available actions in the chapter *SAP Companion Actions for API Command links*.

- *Insert Video*

- *Insert Image*

i Note

You can choose placeholders from a predefined list. This list depends on the application for which you are currently editing help. For example, placeholders can be *ScreenID*, *Language*, *System*, *Version*.

i Note

To add images to the Context Help Bubbles you should edit the content in Producer. For more details refer to the chapter *Editing Content in Manager or Producer* of this document.

Appearance

In the *Appearance* tab, you can edit the content of a bubble. There are the following parameters:

Tile section:

- *Display as Button: (shown only for link tiles)*
Allows to display the link tile as Button.
- *Icon:*
Specifies the icon that will be shown in front on the tile title in the help panel. See *Help Tiles Icon Styles* for available icons.
Note: for link tiles it is only possible to display icons if the tile is **not** displayed as button

Hotspot section:

- *Style:*
Depending on the style, further parameters, such as *Size*, *Offset*, *Position* and *Icon*, are available.
- *Show Help on Hover*
Show the help bubble on hovering over the hotspot. It will close shortly after leaving the hotspot.

i Note

Hotspots of the type *rectangle*, *underline* or *icon* have an option to *show help instantly*. When activated, the hotspot will appear on the screen as soon as the assigned element is visible, even if the help panel is not open. If your SAP Companion configuration avoids requesting content on SAP Companion startup, content cannot be shown instantly.

Bubble section:

- *Orientation:*
Specifies the orientation of the bubble to the hotspot.
- *Offset:*
Specifies bubble position in relation to the element.

- **Size:**
Specifies the size of the bubble.
- **Show Title Bar:**
Specifies to show or hide the title bar of the bubble.

Link (Link Tile)

In the *Link* section, you can configure the link for a link tile. There are the following parameters:

- **Link:**
Specifies the link target. Enter a URL. If you have not provided a URL, a warning sign is shown.
- **Open in Lightbox:**
Specifies that the linked object is displayed in an overlay on top of the application. Otherwise, it opens in a new browser window or tab.

i Note

The lightbox can only be used for iFrame-compatible content. Test your content in the SAP Companion UI to verify that the lightbox is displayed correctly.

When inserting a video from a video platform use the embed link. You will find the embed link in the share dialog box or menu, for example: `https://www.youtube.com/embed/331L0c6xS48`.

i Note

The behavior of links varies for different browsers:


- **Google Chrome or Microsoft Edge:**
Links are always opened in a new tab.
- **Mozilla Firefox**
By default, links are opened in a new tab. To open links in a new window, go to *Options* -> *Tabs* section -> deselect the option *Open links in tabs instead of new windows*.
- **Lightbox Sizing:**
Specifies the size of the lightbox. There are the following options:
 - *Full Screen*
 - *Client Area*
 - *User-Defined*
 - *User-Defined (Overlay):*
The option allows you to specify a lightbox with a custom size, which is displayed as an overlay of the application and the help panel.
- **Lightbox Size:**
Specifies the width and the height of the lightbox. The parameter is displayed for the option *User-Defined*.
- **Show as Announcement:**
Specifies that the lightbox is shown automatically when a user navigates to the page for which there is an *Announcement*. It is shown even if SAP Companion is not open. Only the first lightbox of a link tile is shown for the current screen.
The option can be used, for example, to create push notifications to inform about app changes or to display important general information for a screen.
- **Occurrences:**
Specifies how often the lightbox is shown when opening a screen.

- *Show only once*
- *Show always*

i Note

Users can choose to *not show again* any announcements, even the ones with *Show always* selected.

Preview

With the  *Preview* button you can show your changes during editing from the user's view without leaving the edit mode.

After editing the content, select *Apply* to close the editing dialog box.


2.3.3.1 SAP Companion Actions for API Command links

Description	Link Target
Activate What's New mode if such content is available.	<ul style="list-style-type: none"> • <code>Help4.API.enableWhatsNew(true)</code> • <code>Help4.API.enableWhatsNew(false)</code>
Open or close learning section.	<ul style="list-style-type: none"> • <code>Help4.API.openLearningApp(true)</code> • <code>Help4.API.openLearningApp(false)</code>
Open or close SAP Companion.	<ul style="list-style-type: none"> • <code>Help4.API.openWA(true)</code> • <code>Help4.API.openWA(false)</code> • <code>Help4.API.openWA('toggle')</code>
Select a specific help tile. The tile is highlighted and its bubble is opened.	<ul style="list-style-type: none"> • <code>Help4.API.selectHelpTile(tile number)</code> • <code>Help4.API.selectHelpTile('tile ID')</code>
Show the help bubble of a specific tile. The help panel stays unchanged.	<ul style="list-style-type: none"> • <code>Help4.API.showHelpBubble(tile number)</code> • <code>Help4.API.showHelpBubble('tile ID')</code>
Start a specific guided tour.	<ul style="list-style-type: none"> • <code>Help4.API.startProject('tour ID', true)</code> - guided tour is opened only if it is published • <code>Help4.API.startProject('tour ID', false)</code> - guided tour is opened only if it is not published • <code>Help4.API.startProject('tour ID', 'all')</code> - guided tour is opened irrespective of its published state
Select the next step within a current guided tour.	<ul style="list-style-type: none"> • <code>Help4.API.tourNextStep()</code>
Select the previous step within a current guided tour.	<ul style="list-style-type: none"> • <code>Help4.API.tourPrevStep()</code>
Select a tour step within a current guided tour.	<ul style="list-style-type: none"> • <code>Help4.API.selectTourStep(step number)</code> • <code>Help4.API.selectTourStep('step ID')</code>

2.3.4 Specifying the Hotspot



To assign or edit the hotspot for a help tile, proceed as follows:

i Note

Hotspots cannot be assigned to a [Link Tile](#) .

Assigning a hotspot

To assign or to reassign a hotspot, proceed as follows:

1. Select a [Help Tile](#)  in the help panel.
A menu opens.
You also can assign a hotspot from the open editing dialog box.
2. Select [Assign Hotspot](#)  (icon is shown in the editing dialog).
SAP Companion changes to selection mode.
3. Select a control or position on the screen.
When you need to navigate into a menu or dropdown list, press `SHIFT+A`. This postpones the current assignment to the next click and you can select the control.
The editing dialog box opens.
4. Configure the hotspot in the [Appearance](#) tab.
5. Select [Apply](#).

The dialog box closes, and the hotspot is added to the screen.

When you assign a hotspot, SAP Companion displays a border around the hovered control or area on the app. Only stable elements can be displayed reliably during playback.


For more information, see the *Recognition Indicators for Help Elements* chapter.

→ Recommendation

You can hide tiles assigned already to display unassigned tiles only by pressing `CTRL+U`. That allows easier maintenance of context help with many tiles.

Configuring a hotspot


To configure a hotspot, proceed as follows:

1. Select a [Help Tile](#)  in the help panel.
A menu opens.
2. Select [Edit...](#)
The editing dialog box opens.
3. Select the [Appearance](#) tab.
4. The tab shows the settings available for the hotspot.
Configure the hotspot.
You can find information in the *Hotspot Styles* chapter.
5. Select [Apply](#).

The dialog box closes, and the hotspot is changed.

Unassigning a hotspot

To remove a hotspot, proceed as follows:

1. Select a *Help Tile*  in the help panel.
A menu opens.
2. Select *Unassign Hotspot*.

The hotspot is removed and the icon for a tile without a hotspot is grayed out in the help panel.

Element

The *Element* tab shows you the stored recognition information for an assigned hotspot. The information of the *Recognition Rule* and *Element Selector* parameters can be used to analyze the recognition of the selected element.

If the screen IDs of the target application change, you can update them by using the *Update* button next to the *Recorded Screen ID* field.

2.3.5 Hotspot Styles

You can select a hotspot type in the *Appearance* tab of the editing dialog box under *Hotspot*. These are the styles available for the hotspot of a context help:

Circle



Shows a circle at the position you've selected.

The hotspot has these properties:

- *Use Click Position:*
Specifies whether the hotspot is positioned in the click area. Deactivate the option to position the hotspot in the middle of the control.
- *Position:*
Specifies the position of the hotspot in relation to the assigned object. You can enter *Left* and *Top* in percent from 1 to 99.
- *Offset:*
Specifies the offset with which the hotspot is displayed in relation to the assigned object. You can enter *Left* and *Top* in pixels.
- *Size:*
Specifies the size of the hotspot. Use the slider to select a size.

Rectangle



Shows a rectangle around the control.

The hotspot has this property:

- *Change Size:*
Allows you to change the size of the hotspot. You can enter the width and height in pixels to increase or decrease the size.

Underline



Underlines the control.

The hotspot has this property:

- *Change Size:*
Allows you to change the size of the hotspot. You can enter the width and height in pixels to increase or decrease the size.

Icon



















Shows an icon next to the control that allows you to visualize the content of a bubble, for example, to show important content by a warning sign.

The hotspot has these properties:

- *Icon Type:*
Specifies the type of the icon. For more information about the icons, see the chapter *Hotspot Icon Styles*.
- *Icon Position:*
Specifies the position of the icon in relation to the assigned object.
- *Offset:*
Specifies the offset with which the hotspot is displayed in relation to the assigned object. You can enter *Left* and *Top* in pixels.
- *Size:*
Specifies the size of the hotspot. Use the slider to select a size.

2.3.6 Hotspot Icon Styles

The following icons can be used as hotspots depending on the content that they communicate.

Icon	Description	Icon	Description
	Star		Updated
	Warning		Help
	What's New		Next Step
	Changed		Tour
	New		Learning
	Support		Link
	Information		Attachment
	Maintenance		Tip
	Note		Compliance

2.3.7 Changing the Tile Position

You can change the position of tiles in the help panel. A new tile is inserted at the last position in the help panel.

Change the tile position as follows:

1. Select a tile in the help panel.
On the tile, the number of the current position and arrows are displayed.
2. Use the arrows to move the tile *One Position Up* or *One Position Down*.

2.3.8 Tile Menu

When selecting a tile in the help panel, a menu with the following menu entries is displayed:

- *Assign Hotspot:*
Assigns or reassigns a hotspot to a control or position. Afterwards, SAP Companion switches to the selection mode.
The menu entry is only available for a help tile.
- *Unassign Hotspot:*
Removes an assigned hotspot from a control. The icon for a tile without hotspot is greyed out in the help panel.
The menu entry is only available for a help tile.
- *Edit...:*
Opens the *Edit Content* dialog box. The dialog box allows you to edit and configure the tile content.
- *Hide Tile:*
Hides the tile for the playback. A hidden tile is greyed out in the help panel.
- *Show Tile:*
Shows a hidden tile for the playback again.
- *Remove Tile:*
Removes a tile from the help panel.
The menu entry is not available for SAP standard content.
- *Revert to Original:*
Reverts the changes to a tile to the original status.
The menu entry is available when customizing the SAP standard content.
- *Discard Changes:*
Discards unsaved changes. The button is displayed if unsaved changes are available.

2.4 Guided Tours

You can add new guided tours, add new tour steps to existing tours, and edit available tour steps.

To edit guided tours, the edit mode of SAP Companion changes in an edit mode for a selected guided tour. There are the following controls:



Edit a Guided Tour:

Opens the list of guided tours. Select a guided tour to open the tour edit mode.



Leave Tour Edit Mode:

Leaves the tour edit mode for guided tour you currently have open.

i Note

When you edit a guided tour, all steps are displayed in the help panel. When you play back a guided tour, each step is displayed in a bubble.

2.4.1 Adding a Guided Tour




Training available

Adding a *Guided Tour* and *Guided Tour Steps* is available as interactive training in the SAP Enable Now Info Center.

[Enable Now](#)

To add a guided tour, proceed as follows:

1. Select *Add Help Topic* .
A menu is opened.
2. Select *Add Tour*.
A dialog box is opened.
3. Enter a name.
4. Select *Apply*.

A guided tour project is created in the Manager workarea. The help panel switches to the edit mode for guided tours of SAP Companion.

Afterwards, you can add tour steps to the guided tour. See the chapter *Adding a Tour Step*.

The guided tours in the SAP Companion tour list are sorted alphabetically.



2.4.2 Editing a Guided Tour


To edit a guided tour, there are the following options:

Showing or hiding a guided tour

You can show or hide a guided tour in the guided tours menu for playback.



Proceed as follows:

1. Select *Guided Tours*  to open the *Guided Tours* view.
2. Select a guided tour from the list.
The view changes to the edit mode for guided tours.
3. Select *Show / Hide Options*  -> *Hide Tour* or *Show Tour*.

The option activates the *Hide* option for the SAP Companion project in the Manager workarea. A note is displayed above the help panel that shows you if content is *Visible* or *Hidden* .

Renaming a guided tour



To rename a guide tour, proceed as follows:

1. Select *Guided Tours*  to open the *Guided Tours* view.
2. Select a guided tour from the list.
The view changes to the edit mode for guided tours.
3. Select *Show / Hide Options*  -> *Rename Tour...*
The *New Tour Name* dialog box is opened.
4. Enter a new name.
5. Select *Apply*.

Afterwards, the new name is displayed in the guided tours list.

Removing a guided tour

To remove a guided tour, proceed as follows:

1. Select *Guided Tours*  to open the *Guided Tours* view.
2. Select a guided tour from the list.
The view changes to the edit mode for guided tours.
3. Select *Show / Hide Options*  -> *Remove Tour*.
A note dialog box is opened.
4. Select *Yes*.

Afterwards, the guided tour is removed from the Manager workarea and will not be displayed in the guided tours list. SAP Companion switches to the context help.


Removed guided tours will be moved to the *Trash* in the Manager workarea. You can restore a guide tour from the trash. Afterwards, publish the project to show the guided tour in SAP Companion again.

→ Recommendation

You can remove guided tours also from the workarea view of the Manager.

2.4.3 Adding a Tour Step

To add a tour step to a guided tour, proceed as follows:


1. Select *Guided Tours*  to open the *Guided Tours* view.
2. Select a guided tour from the list.
The view changes to the edit mode for guided tours.


Note


A new SAP Companion project is created in the Manager workarea if no project is available. The project is added in the *Unsorted* group. You can move it into your content group.

1. Adding a tour step

Add a tour step as follows:


1. Select *Add Tour Step* .
The editing dialog box is opened.
2. Enter your text and configure the content.
3. Select *Apply*.

The *Tour Step*  is added to the help panel.

When you add a tour step for a step in another app an icon  is displayed for the step in the edit mode.

2. Assigning a hotspot

Assign a hotspot as follows:

1. Select a *Tour Step* .
A menu is opened.
2. Select *Assign Hotspot*.
SAP Companion switches into the selection mode.
3. Select a control or position on the screen.
The editing dialog box is opened.
4. Configure the hotspot in the *Appearance* tab.
5. Select *Apply*.

The dialog box is closed and the hotspot is added to the screen. The hotspot shows the number of the current step.

Note

When you assign a hotspot, SAP Companion displays a border around the hovered control or area on the app. Only stable elements can be reliably displayed during playback.

For further information see the *Recognition Indicators for Help Elements* chapter.

Note

The hotspot specifies the position of the bubble spike. During playback of a guided tour, no hotspot will be displayed.

2.4.4 Editing the Content





Training available

Editing a *Guided Tour Step* is available as interactive training in the SAP Enable Now Info Center.

[Enable Now](#)

You can edit the content of a tour step in the editing dialog.

Open the dialog box as follows:









1. Select *Guided Tours*  to open the *Guided Tours* view.
2. Select a guided tour from the list.
The view changes to the edit mode for guided tours.
3. Select a *Tour Step* .
A menu is opened.
4. Select *Edit...*

The editing dialog box is opened.

Text

In the *Text* tab, you can edit any textual contents of a step. There are the following parameters:

- *Title:*
Contains the title of the bubble and the help panel tile.
- *Text:*
Contains the text of the bubble. You can edit and format the text with the following formatting functions:

- **B** *Bold*, */* *Italic*, U *Underline*
-  *Remove Formatting*
-  *Left*,  *Center*,  *Right*
- *Paragraph Styles*
-  *Bullets*,  *Numbering*
-  *Indent*,  *Outdent*
- *Insert Placeholder*
- *Insert Link*

- *Free Link*

- *App Navigation Link*

Use this option to add navigation to other applications. This makes it possible to lead users directly to a desired app that is necessary for a process. Such links cannot be opened in preview mode.

Example: to open the *Display Customer Balances* app in SAP S/4HANA, use the app navigation link in the following format: **#Customer-displayBalance**

- *API Command*

You can use SAP Companion Actions (API Commands) links to control SAP Companion from the bubbles. For example, you can start a guided tour from a context help bubble to explain specific processes. See the list of available actions in the chapter *SAP Companion Actions for API Command links*.

- [Insert Video](#)
- [Insert Image](#)


i Note

You can choose placeholders from a predefined list. This list depends on the application for which you are currently editing help. For example, placeholders can be [ScreenID](#), [Language](#), [System](#), [Version](#).

i Note

To add images to the Guided Tour Bubbles you should edit the content in Producer. For more details refer to the chapter [Editing Content in Manager or Producer](#) of this document.

Preview






With the  [Preview](#) button you can show your changes during editing from the user's view without leaving the edit mode.



After editing the content, select [Apply](#) to close the editing dialog box.

2.4.5 Specifying the Bubble

In the [Appearance](#) tab of the editing dialog box, you can specify the display of a bubble. There are the following parameters:

- [Type](#):
Specifies the use of the bubble during the guided tour playback. There are the following types:

Icon/Type	Description
 Start	Specifies the beginning of the guided tour. Shows a Start button and an icon. The bubble can be used to enter an introduction text for the user.
 End	Specifies the finish of the guided tour. Shows a Finish button and an icon. The bubble can be used to enter a closing text for the user.
 Important	Shows an Important icon.
 Info	Shows an Info icon.
 Note	Shows a Note icon.

Icon/Type	Description
 Tip	Shows a <i>Tip</i> icon.
 Action	Shows a general step of a guided tour. No icon is displayed.


- **Orientation:**
Specifies the orientation of the bubble to the hotspot. Select an orientation from the dropdown list.
- **Offset:**
Specifies bubble position in relation to the element.
- **Size:**
Specifies the size of the bubble. Select a size by using the slider.
- **Show Bubble Arrow:**
Specifies whether an arrow is displayed to point to the control. Deactivate the option to show the bubble without arrow.
- **Show Title Bar:**
Specifies to show or hide the title bar of the bubble.

2.4.6 Specifying the Hotspot

To assign or edit the hotspot for a tour step, proceed as follows:

i Note

The hotspot specifies the position of the bubble spike. During playback of a guided tour, no hotspot is displayed.


1. Select a *Tour Step* .

A menu opens.

You also can assign a hotspot from the open *Edit Content* dialog box.
2. Select one of the menu entries.
 - **Assign Hotspot :**
Allows you to assign a hotspot for a tour step.
 - **Center on Screen:**
Centers the bubble on the screen. No bubble spike is shown.
 - **Unassign Hotspot:**
Removes the hotspot for a tour step.
The icon for a tile without a hotspot is grayed out in the help panel.
 - **Edit...:**
Allows you to configure the hotspot.

Assigning a hotspot

To assign or to reassign a hotspot, proceed as follows:

1. Select *Assign Hotspot*  (icon is shown in the editing dialog).
SAP Companion changes to selection mode.
2. Select a control or position on the screen.
When you need to navigate to a menu or dropdown list press `SHIFT+A`. This postpones the current assignment to the next click and you can select the control.
The editing dialog box opens.
3. Configure the hotspot.
4. Select *Apply*.

The dialog box closes, and the hotspot is added to the screen.

Note

Previously assigned hotspots are automatically hidden when you assign a new hotspot to the guided tour step. After assignment, the hotspots are visible again, and you can hide them with the *Show / Hide Hotspots* button.

When you assign a hotspot, SAP Companion displays a border around the hovered control or area on the app. Only stable elements can be displayed reliably during playback.

For more information, see the *Recognition Indicators for Help Elements* chapter.

Recommendation

You can hide steps already assigned to display unassigned steps only by pressing `CTRL+U`. That allows easier maintenance of guided tours with many steps.

Assigning a hotspot to another screen

For a guided tour, you also can add steps that are visible on another screen. To assign a hotspot to another screen, first open the required page. Afterwards, select *Assign Hotspot* from the step menu and assign the hotspot.

Configuring a hotspot

To configure a hotspot, proceed as follows:

1. Select *Edit...*
The editing dialog box opens.
2. Select the *Appearance* tab.
3. Configure the hotspot:
 - *Use Click Position:*
Specifies whether the hotspot is positioned on the click area. Deactivate the option to position the hotspot on the middle of the control.
 - *Offset:*
Specifies the offset with which the hotspot is displayed in relation to the assigned object. You can enter *Left* and *Top* in pixel.
 - *Size:*
Specifies the size of the hotspot. Select a size by using the slider.
4. Select *Apply*.

The dialog box closes, and the hotspot is changed.

Element

The *Element* tab shows you the stored recognition information for an assigned hotspot. The information of the *Recognition Rule* and *Element Selector* parameters can be used to analyze the recognition of the selected element.

If the screen IDs of the target application change, you can update them by using the *Update* button next to the *Recorded Screen ID* field.

2.4.7 Specifying the Auto Progress


In the *Automation* tab of the editing dialog box, you can specify the auto progress of a step. By doing this, the next step is automatically displayed when a user has clicked on a button or entered a text in an input field. There are the following parameters:

- *Element Type*:
Specifies the recorded element type. The element can be a *Clickable Element* or an *Input Field*.
- *Show Next Step*:
Specifies the action to execute the current step and to show the next step. Make sure that the selected action corresponds to the element type. There are the following actions:
 - *Click on Next Button*
 - *Click on Element*
 - *Hover Over Element*
 - *Press Tab Key*
 - *Press Enter*
 - *Type in Input Field*
 - *Leave Input Field*
- *Skip Step on Missing UI Element*:
Specifies that four steps of a guided tour are skipped automatically if an UI element is not present in the UI of an app. You can use the setting for optional steps that are shown in specific scenarios only.

2.4.8 Changing the Tour Step Position

You can change the position of tour steps in the help panel. A new tour step is inserted at the last position in the help panel. The assigned hotspot shows the number of the step position.

Change the position as follows:

1. Select a *Tour Step* .
At the tour step, the number of the current position is displayed.
2. Use the arrows to move the step *One Position Up* or *One Position Down*.

The step is moved in the help panel and the hotspot number is changed.

→ Recommendation

You can change the position of a tour step also in the *Edit Content* dialog box, when editing the tour step.



2.4.9 Tour Step Menu

When selecting a tour step in the help panel, a menu with the following menu entries is displayed:

- *Assign Hotspot:*
Assigns or reassigns a hotspot to a control or position. Afterwards, SAP Companion switches to the selection mode.
- *Center on Screen:*
Centers the bubble on the screen. No bubble spike is shown.
- *Unassign Hotspot:*
Removes an assigned hotspot from a control. The icon for a tile without hotspot is greyed out in the help panel.
- *Edit...:*
Opens the *Edit Content* dialog box. The dialog box allows you to edit and configure the tour step content.
- *Remove Tile:*
Removes a tour step from the help panel. The menu entry is not available for SAP standard content.
- *Revert to Original:*
Reverts the changes to a tour step to the original status. The menu entry is available when customizing the SAP standard content.
- *Discard Changes:*
Discards unsaved changes. The button is displayed if changes are available.

2.5 Adding What's New Content

You can add What's New content for your app. This is how you do it:

1. Select *What's new*  to open the *What's New* view.
2. Select *Add Help Topic* .
A menu opens.
3. Select one of these menu entries:
 1. *Add Tour*
 2. *Add Help Tile*
 3. *Add Link Tile*

For more information, see the chapters *Adding a Tile* and *Adding a Guided Tour*.

→ Recommendation

What's New content is often used for only a short period of time. You can reuse the content in your standard content to keep the information.

In the project editor of Producer you can copy the required macros from the What's New project to your project with the standard content. Afterwards, unpublish the What's New project to hide the content in SAP Companion.

2.6 Saving and Publishing Content

Saving content



To save your changes, select the *Save Changes* control. The changes are stored in the Manager. Your changes will be displayed in the view mode for the end user after you publish the content.

i Note

It is not possible to unpublish content in edit mode. You can unpublish a help or a guided tour project in the workarea view of the Manager.

→ Recommendation

During each save a new version of SAP Companion project is saved on the Manager. This allows you to revert a project to a previous status.




Preview content



Before publishing your content for the users, you can preview your changes. Leave the edit mode by selecting *Enter/Leave Edit Mode*. Afterwards, select *Toggle Editor/Published Stage*.



Guided tour list in edit mode

The guided tour list shows different color icons for the status of the content:

-  - Tour is published.
-  - Tour is new and not published.
-  - Tour content has been changed but is not published.

Publishing content



Only published content is visible for the users. After editing content or adding new content a note is displayed above the help panel that shows you, that the content is *not published* . To publish your content, select *Show / Hide Options -> Publish Help* or *Publish Tour*. Afterwards, the note above the help panel changes to *published* .

2.7 Controls of the Edit Mode

The edit mode of SAP Companion has the following general controls in the help panel:



Add:

Allows you to add a tile, a guided tour, or a tour step.



Save Changes:

Allows you to save your changes. The button is displayed if changes are available.



Discard Changes:

Allows you to discard your unsaved changes. The button is displayed if changes are available.



Show / Hide Hotspots:

Shows or hides the hotspots on the application.

i Note

Previously assigned hotspots are automatically hidden when you assign a new hotspot to a guided tour step. After assignment, the hotspots are visible again, and you can hide them with the [Show / Hide Hotspots](#) button.



Show / Hide Options:

Displays further options. Select a menu entry:

- [Show Context Information...:](#)
Opens a dialog box, which shows the current context of the application. You also can open the dialog box with **Ctrl + Shift + I**.
- [Show Keyboard Shortcuts...:](#)
Opens a dialog box with an overview of shortcuts for using SAP Companion. The shortcuts cannot be changed.
- [Show in Manager Workspace...:](#)
Opens the connected Manager with the current workarea.
- [Edit in Manager Web Editor...:](#)
Opens the web editor of the Manager with the current SAP Companion project.
- [Revert All to Original:](#)
Reverts all changed tiles to the original status. The menu entry is available when customizing the SAP standard content.
- [Release Information...:](#)
Opens an external page with information about the latest SAP Companion releases.

Help

- [Publish Help:](#)
Allows you to publish your help changes.

- *Remove Help:*
Allows you to remove help.

Guided Tour

- *Rename Tour...:*
Allows you to rename a guided tour. The menu entry is available in edit mode for guided tours.
- *Hide Tour / Show Tour:*
Allows you to show or hide a guided tour for the use.
- *Publish Tour:*
Allows you to publish your help changes.
- *Remove Tour:*
Allows you to remove a guided tour. The menu entry is available in edit mode for guided tours.
- *Remove Tour Extension:*
Allows you to remove the extended content of a guided tour to display the standard content. The menu entry is available in edit mode for guided tours.



Enter / Leave Edit Mode:


Switches the help panel into the edit mode and shows the editing functions. Switches back to the playback mode when selecting the button again.



Show / Hide Panel:

Shows and hides the SAP Companion panel. You also can select *Open Help* to show the panel again.

2.8 Context Information

The *Context Information* dialog box shows the current context of the application. You can open the dialog box by selecting *Show / Hide Options*  -> *Show Context Information...*

→ Recommendation

For SAP Enable Now content objects the context has to be added manually. You can use the *Context Information* dialog box to see the context for a specific page and to enter it into the content object parameters.

The following information is displayed:

- *Screen ID:*
Displays the ID of the current page.
- *Context Information:*
Displays the saved context information, which is required to display the content. The information of the *Context Information* is divided into *Requested* and *Available*. The requested information is required to show help content. The available information is the information that is available in the application.
 - *Language*
 - *Product*
 - *Product Version*
 - *System*
 - *Content Roles*

- *Environment Information:*
Displays information about the application environment, for example, version of the help framework.

Adding Help

If no help is available for an app or app screen, the dialog box is displayed automatically. For authors, buttons to create content for the app are displayed in the footer. Choose the type of help you want to create. For context details, expand the *Additional Information* dropdown.

2.9 Keyboard Shortcuts for Editing



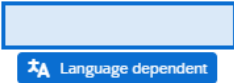
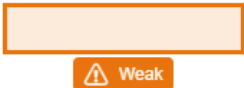
SAP Companion includes keyboard shortcuts to assist you while editing the help content:

Action	Keyboard Shortcut
Opens and closes SAP Companion.	F1
Focuses the app.	SPACE
Focuses the help.	SHIFT + F2
Navigates to previous tour step.	F8
Navigates to next tour step. Opens and closes the search.	F9
Assigns the hotspot.	A
Postpones the assignment of a hotspot and allows you to navigate in the app.	SHIFT + A
Hides already assigned tiles in the help panel.	CTRL + U
Toggles the hotspot.	H
Toggles the capture info.	I
Opens the <i>Context Information</i> dialog box.	CTRL + SHIFT + I
Navigates to the previous menu item.	UP
Navigates to the next menu item.	DOWN TAB
Opens or starts content. Opens the bubble. Executes a control.	SPACE ENTER
Closes content. Aborts an action.	ESC

2.10 Recognition Indicators for Help Elements

The recognition of UI elements, for example, buttons or text fields, is essential for SAP Companion to display the help directly beside the associated element. During assignment of a context help tile or a guided tour step to an UI element, SAP Companion shows a colored rectangle that indicates the recognition quality.

The following rectangle colors can be displayed.

Border	Description
	The UI element has a unique attribute and can be recognized.
	The UI element has no unique attribute, but the recognition quality is robust for an assignment. It is recommended to test the display of the help afterwards.
	The UI element has no unique attribute, but the name of the UI element allows a robust assignment. The assignment is language-dependent and has to be newly assigned for localized projects. A test after the assignment is recommended.
	The UI element has no unique attribute, the recognition is dependent on the application hierarchy and quality might not be good. A test is required to ensure that an UI element can be recognized as stable.

i Note

We recommend aiming for a dark green rectangle when assigning help elements. Try to move the cursor around your UI element to see if it improves the recognition quality. For example, if you have text element in your help and you see a language flag, try moving the cursor outside of text to increase the recognition quality and decrease testing efforts.

Element information

When assigning a hotspot, you can show detailed information about the element. The information can be helpful to analyze a control if a hotspot is not displayed correctly.

Press the **I** key during assignment of a hotspot. The element information is displayed at the bottom of the screen and shows the following:

- *Recognition Rule*
- *Element Tag / Element ID*
- *Element Offset*
- *Element Selector*

3 Editing Content in Manager or Producer

You can edit SAP Companion content by using SAP Companion projects. When you edit content in the web-based editor, the projects will be created automatically. The content will be stored on an SAP Enable Now Manager workarea. You can edit the projects in project editor.

There are the types:



SAP Companion - Context Help



SAP Companion - Guided Tour

3.1 Editing SAP Companion Projects

The content of SAP Companion can be edited in project editor. You are able to change the text of the tiles and bubbles and you can specify the macro parameters in the macro editor.

i Note

For further editing, for example to assign a hotspot, use the editor of SAP Companion in the application.

Editing content in project editor

To edit an SAP Companion project, proceed as follows:

1. Open the workarea with your SAP Companion content in Manager.
2. Select an SAP Companion project.
3. Select *Edit* to open the project in project editor.
4. Select a macro in the thumbnail view.
The parameters of the macro are displayed in the macro editor.
5. Edit the macro parameters.
6. Save the project.
7. Publish the project to see the changes in SAP Companion.

i Note

To add additional content to the Context Help or Guided Tour Bubble, for example, images or video, open the *Bubble Text* HTML editor and insert the content. You can do this in Manager or Producer.

→ Recommendation

You can open an SAP Companion project from the edit mode of SAP Companion. In the help panel, select *Show / Hide Options -> Edit in Manager...* to open the editor.

For more information about the macros and the macro parameters, see the *SAP Companion Macros* chapter.

3.2 SAP Companion Macros

For SAP Companion projects, the following macros are available:



3.2.1 Settings



The *Settings* macro is required for initialization of the content and defines the project type. It is located at the beginning of a project. When using the recording, this macro is inserted automatically.

Parameters of the Macro

The following parameters are available:

- *Type:*
Specifies the content type of the project.
 - *Context Help*
 - *Guided Tour*

3.2.2 Screen



The *Screen* macro defines the application page.




Macro Parameters

The macro contains the following parameters:

- *Title:*
Contains the name of the screen. The name of the application window is inserted during the recording.
- *Screenshot:*
Contains the screenshot of the recorded screen.

Further Functions

At the top of the macro editor, the following functions are available for the macro:

-  *Update Screen:*
This function allows you to update the recorded screen.
-  *Add Tile* (Context Help):
This function allows you to add a *Tile* for the *Screen*. The tile is added below the screen.
See also *Tile*.
-  *Add Tile with Link* (Context Help):
This function allows you to add a *Link Tile* macro.
See also *Link Tile*.

3.2.3 Tile



The *Tile* macro allows you to add help information to be displayed in a tile. You can edit the title and the text of the tile in the help panel and the text of the bubble.

The macro can be inserted using the macro editor's toolbar when a *Screen*  macro is selected.

Parameters of the macro

The following parameters are available:

- *Tile Title:*
Contains the title of the bubble and the help panel tile.
- *Tile Text:*
Contains the text for the macro to be displayed in a tile of the help panel.
- *Bubble Text:*
Contains the text of the bubble.
- *Hotspot Size:*
Defines the size of the hotspot. Select a size from the dropdown list.
- *Bubble Size:*
Defines the size of the bubble. Select a size from the dropdown list.

Links in Bubble Texts

You can add links to the bubbles of help tiles and show them in a lightbox. For details and the list of available SAP Companion action links, see the chapters *Editing the Content* (Context Help Tiles) and *SAP Companion Actions for API Command links*.

To assign a link in the text editor, go to *Insert Link* dialog. *Open in Lightbox* checkbox is shown at the bottom of some link options. If activated, *Parameters* allow you to specify the appearance of the lightbox. For details on lightbox parameters, see chapter *Context Help Tiles -> Editing the Content*.

3.2.4 Link Tile




The *Link Tile* macro allows you to add a link for further content in the tile. The content can be SAP Enable Now content, an external web page, or a document. Alternatively, you can display content in a lightbox as an overlay on the screen.

The macro can be inserted using the macro editor's toolbar when a *Screen*  macro is selected.

Parameters of the macro

The following parameters are available:

- *Tile Title:*
Contains the title of the bubble and the help panel tile.
- *Tile Text:*
Contains the text for the macro to be displayed in a tile of the help panel.
- *Display as Button:*
Allows to display the link tile as Button.
- *Tile Icon:*
Specifies the icon that will be shown in front of the tile title. It is only possible to display icons if the tile is **not** displayed as button. See the chapter *Help Tiles Icon Styles* of this document for available icons.
- *Link to:*
Specifies the link target. Select *Edit Link...*  to open the *Edit Link* dialog box.
- *Show in Lightbox:*
Specifies that the linked object is displayed in an overlay on top of the application. Otherwise, it will open in a new browser window or tab.

i Note

The lightbox can only be used for iFrame-compatible content. Test your content in the SAP Companion UI to verify that the lightbox is displayed correctly.

When inserting a video from a video platform use the embed link. You will find the embed link in the share dialog box or menu, for example: <https://www.youtube.com/embed/331L0c6xS48>.

- *Lightbox Size:*
Specifies the size of the lightbox. There are the following options:
 - *Full Screen*
 - *Client Area*
 - *User-Defined*
 - *User-Defined (Overlay):*
The option allows you to specify a lightbox with a custom size, which will be displayed as an overlay of the application and the help panel.
- *Width, Height:*
Specifies the width and the height of the lightbox. The parameter is displayed for the option *User-Defined*.

- *Show as Announcement:*
Specifies that the lightbox is shown automatically when a user navigates to the page for which there is an *Announcement*. It is shown even if SAP Companion is not open. Only the first lightbox of a link tile is shown for the current screen.
The option can be used, for example, to create push notifications to inform about app changes or to display important general information for a screen.
- *Occurrences:*
Specifies how often the lightbox is shown when opening a screen.
 - *Show only once*
 - *Show always*

i Note

Users can choose to *not show again* any announcements, even the ones with *Show always* selected.

3.2.5 Guided Tour Step



The *Guided Tour Step* macro defines a step of the guided tour for a recorded control of the application.

Parameters of the macro

The following parameters are available:

- *Bubble Title:*
Contains the title of the bubble.
- *Bubble Text:*
Contains the text of the bubble.
- *Show Arrow:*
Specifies that the bubble is shown with an arrow.
- *Center Bubble:*
Specifies that the bubble is shown in the center of the screen. If the setting is deactivated, the bubble is shown on the object.
- *Object Image (Advanced Layout):*
Contains the icon or an image of the recorded control. The object image will be shown in the bubble text.

3.3 Translating SAP Companion Content

You can use your created SAP Companion content in different languages. The content is displayed in the language that is set as the UI language of your application. If no content is available for a particular language, then the English content will be shown by default.

Each object or structure with a specific language is managed as an individual object. To translate your content, you have to duplicate your source. As a result, you have an identical content structure in each language.

Recorded hotspots are language-independent. The content for the hotspot is displayed based on the UI language.

If machine translation is configured for your system, the users can use it to translate in-app help instantly from the original help language to their preferred UI language.

For configuration information, see the [SAP Companion Integration Guide](#).

For end-user information, see the [SAP Companion User Guide](#).

3.3.1 Translation Process

Proceed as follows in the Producer, to create content in other languages:

1. Preparation

Prepare your translation:

1. Finish editing your source content.
2. Duplicate your content:
 1. Select the source structure.
 2. Select *Context Menu -> Duplicate...*
A dialog box opens.
 3. Select *Duplicate sub-objects*.
 4. Select *Advanced* to show further settings.
 5. Select *Set Language*.
 6. Choose your target language for the structure from the dropdown list.
 7. Select *OK*.
3. Move the duplicated content to the required position in your content tree.

Duplicate your content for each required language.

2. Exporting Translation Files

You can translate your content by using translation files.

Export translation files:

1. Select the structure.
2. Select menu *Tools -> Localization -> Export Translation Files...*
A dialog box is opened.

3. Adapt the settings in the dialog box.
 1. *Format:*
Select the translation file format.
 2. *Structure:*
Specify if you want to export an object or a complete tree.
 3. *Combine in one file:*
Select this setting if you want to export one file with all translations.
Deactivate this setting if you want to export several translatable files for all the objects of a structure.
 4. *Destination folder:*
Enter a destination folder for the export.
4. Select *OK*.

The translation files are created in the folder.

3. Importing Translation Files

Import translation files:

1. Open the project editor or the specific project in the project editor.
2. Select menu *Tools -> Localization -> Import All Translations...*
A dialog box is opened.
3. Choose your destination folder.
4. Select *OK*.

The texts are imported and replace the original content.

4 Creating Content for the Learning Section



The learning section of SAP Companion allows you to provide any knowledge material, for example, created with SAP Enable Now (such as process tutorials or interactive courseware) to your users.

There are the following use cases:

- Task Tutorials for business process step tasks – compatible with In-Solution and In-App Learning
- Getting Started Tutorials to start working and configuring the system – onboarding with the solution
- Implementation and Configuration Tutorials for advanced configuration tasks

You can create content for the learning section in SAP Enable Now Producer or Manager.

4.1 Content Objects

You can use the following content types in the learning section:



Simulation

Use recordings of your application as process tutorials.



Book page

Use multimedia learning content in single book pages.



Book

Use a set of book pages structured in a book.



Media Object

Use a video, audio, image, or document.



Text Unit

Use texts for more detailed explanations.



Group

Use groups to structure your content.

Content list

For each object, the type icon, the name, and the short description is displayed in the learning content list. The content in the content list is sorted alphabetically.

Content object parameters

Each content object requires the following parameters:

1. Enter a *Name* and a *Short Description*.
2. Specify context parameters.
3. Specify roles (optional).
4. Assign a category (optional).

Editing content objects



To start the editing, proceed as follows:

1. Select *Enter / Leave Edit Mode*.
2. Select *Edit in Manager*.

The Manager with the required workarea is opened.

4.2 Specifying a Context

All content objects have specific context properties for SAP Companion. The context specifies in which app and on which page the content is displayed and if it is shown as recommended in the Learning view.

For more information, see the *Context Properties of Content Objects* chapter.

4.3 Specifying Roles

You can display your content role-specific to your users. These allows you to filter your content for each role.

In the learning center, a *Roles* dropdown box is displayed allowing learners to select a specific role.

Specifying roles

Each content object has a *Roles* parameter. To specify roles, proceed as follows:

1. Open the workarea view of the Manager.
2. Select a content object in the tree.
3. Select *Layout Selection -> Advanced Layout* in the object editor.
4. Go to the *Roles* parameter.
5. Insert a role name into the edit field.
6. You can insert further roles separated by a comma.

4.4 Assigning a Category

For your content, you can specify categories for sorting it in the learning center.

In the learning center, buttons for the categories are displayed allowing learners to select a specific category.

There are the following categories:



Show All Available Content

Displays all available content for an app.



Learning Package



Get Started



Processes



Implement



Other

Assigning a category

To assign a category, proceed as follows:

1. Open the workarea view of the Manager.
2. Select a content object in the tree.
3. Open the *Learning Context* section in object editor.
4. Select a category from the *Learning Category* dropdown list.

4.5 Customizing the Standard Content of the Learning Section

The learning section provides default help content for supported SAP applications. You can customize the content for your own requirements by inserting the standard content into your SAP Enable Now instance.

4.5.1 Setting Up the Workareas

To customize the standard content, you must connect your Manager with the workarea of the SAP Manager. In addition, you must create a separate workarea to reuse and to customize the standard content.



Training available

Best practices for configuring the Learning section are available as interactive training in the SAP Enable Now Info Center.

[Enable Now](#)

Note

Further information about connected workareas is available in the [Manager manual](#).

Prerequisites

In the *Server Settings* of the Manager, you must activate the following settings in the *Connected Workarea* section:

- *Enable Connected Workarea Feature:*
This setting is required to determine a read-only caching workarea. It allows you to connect with the Manager of the standard content.
- *Enable Workarea Extensibility Feature:*
This setting is required to be able to reuse data from the caching workarea of the Manager. It allows you to reuse the standard content for your custom content in a separate workarea.

Connecting the standard content workarea

You have to connect your Manager with the workarea of the SAP standard content. Proceed as follows:

1. Open the *Administration -> Workarea / Tags* view.
2. Select *Connect*
The connection dialog box is opened.
3. Enter the following parameters:
 - *Name*:*
Enter a name by which the connected workarea will be displayed.
For example: SAP Standard Content
 - *ID*:*
Enter an ID for the workarea.

- **URL*:**
Enter the path to the published workarea of the Manager with the SAP Standard Content (see table below).
- **Proxy URL:**
If you need to bypass the connection using a proxy, enter the proxy address.
- **Proxy Port:**
Enter the port number of the proxy server.
- **Username:**
Enter the username to be used for connecting.
Default content: customer
- **Password:**
Enter the according password for the user.
Default content: Leave the password field empty.

4. Select **OK**.

i Note

The connection to the workarea takes some time as there are a large number of content objects. If you get an error message you can adjust the time out of the server in the [Server Settings](#).

Open the [Server Settings](#) and go to [Miscellaneous](#) -> [Timeout of server request](#). Enter a value in milliseconds.

The workarea is connected and displayed in the workarea list. The workarea can be identified by a [Connected](#) banner.

Standard content URLs

Standard content is available for the following products:

Product	Manager workarea URL
SAP S/4HANA (On-Premise, Cloud)	https://education.hana.ondemand.com/education/wa/s4/~tag/published/
SAP Marketing Cloud SAP Sales Cloud SAP Service Cloud	https://education.hana.ondemand.com/education/wa/c4/~tag/published/
SAP Integrated Business Planning	https://education.hana.ondemand.com/education/pub/dsc
SAP SuccessFactors	https://education.hana.ondemand.com/education/wa/sfsf/~tag/published/
SAP Ariba	https://education.hana.ondemand.com/education/wa/aribanc/~tag/published/

Creating an extended content workarea

For your extended content, you have to create a workarea that uses the content and resources of the connected workarea as base. Proceed as follows:

1. Go to *Quick Add*.
2. Enter a *Name* and an *ID*.
3. Select *Add*.
The workarea is created and displayed in the workarea list.
4. Got to the created workarea in the list.
5. Select *Edit...*.
The *Edit* dialog box is opened.
6. Select the connected workarea in the *Base Workarea* parameter.
7. Select *OK*.

The workarea is extended and can be identified by an *Extended* banner.

→ Recommendation

After a workarea is extended the content is located in the *Unsorted* section. You can move the content into your content section.

4.5.2 Customizing the Content

You can customize the SAP standard content as follows:

1. Open your extended workarea in the workarea view of the Manager.
2. Select an object in the tree.
3. Select the *Fetch Data* button to load the object into your workarea.
4. Select *Start Editing* to edit the object.
5. Customize the content as required.
6. Select *Finish Editing*.
7. Select *Publish* to publish the content.

Your customized content is then displayed in SAP Companion.

i Note

You may come across additional parameters of the learning objects under the section *Other Learning App Context*. These parameters are used for book pages and are applied through a placeholder on the top pf the page. They are not covered by the standard as they are custom and might be subject to change. However, you can still adjust them to your needs following the process above.

Resetting content

To reset customized content to the default status of the SAP standard content it is required to delete the customized object. The original content is then displayed.

i Note

When deleting content, make sure you also empty the *Trash*. If the content object is available in the trash, it will still be displayed in SAP Companion.

5 Context Properties of Content Objects

To display SAP Companion content for a specific app, on a specific page, and for a specific version, the context must be specified. All SAP Enable Now content objects have context properties for SAP Companion. The properties contain the context information about an app and page.

Select an object in the tree structure of the SAP Enable Now Producer or Manager and go to the object editor.

Context

The *Context* parameter specifies the name of the recorded page. Select *Advanced Layout* to display the parameter.

- **SAP Companion projects**
For SAP Companion projects, the parameter is inserted during recording.
- **What's New content**
To specify a content object for the What's New mode you have to add *!whatsnew* as context attribute. For example: `Shell-home!whatsnew`
- **Content objects for Learning**
For other content objects (for example, book pages and simulations) you can record the context or you can add the context manually.

SAP Companion section

The parameters in the *SAP Companion Context* specify the app of a specific page. For SAP Companion projects, the parameters are inserted during recording and can be changed manually. For other content objects, you can add the context manually.

- *Product Name:*
Specifies the internal product name of the app.
For example: `SAP_S4HANA_CLOUD`
- *Product Version:*
Specifies the version number of the app. You can add multiple version numbers, separated by a comma.
For example: `1902.500`

5.1 Recording a Context

In addition to projects, you can also add other objects to the learning section. These objects must have context information. The context information for projects is added during recording. For other objects, each context has to be recorded individually. The context is the application with the current application page and version and is stored in the *Context* parameter.

A context can be recorded for the following objects:



Books



Book Pages





Text Units



Groups

Recording a context for books and book pages

To record a context, proceed as follows:

1. Open the application at your required application page.
2. Select an object from the Producer's content tree.
3. Select *Record Context -> Record SAP Companion Context*  in the object editor.
4. The *Select Window and Profile* dialog box opens. You can define the following parameters:
 - *Choose Window:*
Select the target application window for the recording.
 - *Choose Profile:*
Shows the application profile for the target application window.
 - *Associate with Selected Window:*
Specifies that the profile is always used for the target application window.
5. Select *Choose* .

The context of the selected window is recorded and the context information is inserted into the *Context: SAP Companion* parameter of the object.

Recording a context for simulation projects

For simulation projects, the SAP Companion context can be saved during the recording of a simulation. After recording is done, the simulation is available for the learning section.

Note


The recording of a context is supported for **SAP S/4HANA** and **SAP SuccessFactors**.

5.2 Updating a Recorded Context

You can use more than one context information for an object. This gives you more flexibility in using content for different application windows or applications.

Editing a context

To edit a context, proceed as follows:

1. Select an object in the content tree with an available context.
2. Select *Record Context* -> *Record SAP Companion Context*  in the object editor.
3. Afterwards, a dialog box is displayed.

Select one of the options and confirm with *OK*:

- *Add Context:*
Select this option to add the context to an available context.
The *Select Window and Profile* dialog box is displayed so you can start the recording.
- *Update Context:*
Select this option to update a recorded context with a new version.
The *Update Context* dialog box is displayed with all available contexts. Select the context you want to record.
- *Replace All Contexts:*
Select this option to remove all available contexts and to insert a new context.
- *Delete Context:*
Select this option to remove an available context.
The *Delete Context* dialog box is displayed, with all available contexts. Select the context you want to delete.

Update / Delete Context dialog box

When updating or deleting a context, a dialog box opens. The dialog box displays the available context of an object.


- *Available Contexts:*
The field displays the available contexts for a selected profile. Select a context to display the detailed information.
- *Update or Delete:*
Select the control to update or to delete a selected context.
When updating a context, the *Select Window and Profile* dialog box is displayed so that you can start the recording.

5.3 Specifying a Context Manually

In some situations, a context cannot be recorded. For this you have to enter the context manually.

To specify the context manually, proceed as follows:

→ Recommendation

You can use the *Context Information* dialog box to see the context for a specific page. Open the dialog box in edit mode in SAP Companion by selecting *Show / Hide Options*  -> *Show Context Information...*

1. Open the Manager's workarea view.
2. Select a content object from the tree.
3. Activate the *Advanced Layout* of the object editor.
4. Enter the screen ID of the page in the *Context* parameter.
5. Open the *SAP Companion Context* section in the object editor.
6. Edit these parameters:
 - *Product Name:*
Enter your app's internal product name.
For example: SAP_S4HANA_CLOUD
 - *Product Version:*
Enter your app's version number.
For example: 1902.500

Updating the product version

When creating content for a new version of a product, you have to update the *Product Version* parameter. You can duplicate a project to change the content for the new version. In the *Duplicate* dialog box, you can enter a new product version.

5.4 Updating the Context Properties

The product name and version have to match with the target application to display the corresponding content. When the product name or version of your target application has been changed you have to update the context parameters. You can change them manually in the object editor for an object. You can add multiple properties, separated by a comma.

Using bulk changes

You can also edit the product name and version of your context properties by using bulk changes. Select *Tools -> SAP Companion -> Context Maintenance...* to open the *Context Maintenance* dialog box.

The dialog box has the following parameters:

- *Start from:*
Specifies the structure of project for editing the context. You can change the object by selecting *Edit Link...*

- **Action:**

Specifies the action to edit the product version or product name. Select an action from the dropdown list:

 - *Add Product Versions:*
Adds a product version to an available product version.
 - *Set Product Versions:*
Sets the product version and removes entered product versions.
 - *Remove Product Versions:*
Removes the entered product versions.
 - *Add Product Names:*
Adds a product name to an available product name.
 - *Set Product Names:*
Sets the product name and removes entered product names.
 - *Remove Product Names:*
Removes the product names entered.
- **Values:**

You can enter a product version or product name.
You can enter multiple values separated by a comma and you can use whitespaces as part of a product version or product name.

Example

Adding the product version *1811* to the available values *1805,1808* will result in *1805,1808,1811*.

Removing the product version *1805* from the available values *1805,1808,1811* will result in *1808,1811*.

Note

Make sure you have the write permissions for all required objects.

6 Technical Support

Please use the SAP Incident Wizard on the SAP Support Portal to submit your incidents on the following components:

- **KM-SEN** // Enable Now
- **KM-SEN-CMP** // Enable Now – SAP Companion Integration
- **KM-SEN-WAC** // Enable Now – SAP Companion Content Authoring
- **KM-SEN-PRO** // Enable Now – Producer
- **KM-SEN-MGR** // Enable Now – Manager

Using the SAP Support Portal

If you are not familiar with the SAP Support Portal, read the following information:

- To access the SAP Support Portal, you need an S-user ID and password. You can request access data from your SAP Super Administrator or register online on the SAP Support Portal page under [Registration](#).
- With this user, you have read-access to all the contents of the SAP Support Portal, you can use the SAP Community Network and SAP Help Portal, and you can also book courses under SAP Education.
- If you want to work with the support applications (Incident Wizard, license key request, system data maintenance, manage remote connections, software download and so on), you need the corresponding authorizations, which your SAP Super Administrator can give you.
- You can find information for new users and about support applications on the Support Portal Homepage under [Learn More](#). There you can also register for a personal overview demonstration of the SAP Support Portal.
- In case of problems with SAP Support Portal contact your local Customer Interaction Center. An online web form is available on <http://support.sap.com/contactus>. This web form should be used for all written communication with your local customer interaction center. More Details about Incident Processing, Support Addresses and Hotline Numbers can be found here: <http://service.sap.com/sap/support/notes/560499>

Diagnosis function in Producer

The Producer diagnosis function can also be used to check the technical data of the installation on your computer (version, operating system, browser, etc.). Open Producer and select *Diagnosis...* by using the *Help* menu. The Producer transmits the required information automatically and lists this in a corresponding dialog box. This information can also be saved as a text file and sent as an E-mail attachment to the SAP support staff.

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