

# ClickLearn Studio

- A technical guide



9/18/2017

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## Table of Contents

1.	Purpose.....	3
2.	ClickLearn terminology.....	3
	ClickLearn file formats .....	4
	Recording .....	4
	Book.....	4
	Shelf .....	4
	File size and criticality .....	5
	Template .....	5
	Workspace.....	5
3.	File management in ClickLearn .....	6
	Storing ClickLearn files - single author scenario.....	6
	Storing ClickLearn files - multiple authors scenario.....	6
	File management.....	6
	Metadata.....	8
4.	Organizing content.....	8
	Target audience.....	9
	Keeping recordings clean.....	9
	Topics .....	9
	Multiple shelves.....	10
5.	Languages in ClickLearn.....	10
	Translation process .....	10
	Statistical Machine translation (auto-translation) .....	11
	Working with languages in ClickLearn Studio.....	11
	Auto-translation.....	12

Using Replay for translation .....	12
Speech editor .....	12
Using templates with languages.....	13
Appendix.....	14

## 1. Purpose

The purpose of the technical guide is to share technical guidelines for using ClickLearn Studio to produce documentation and training materials of IT systems. For more detailed documentation of ClickLearn Studio, please refer to the online help available via Help menu or F1 inside the application. This document will cover guidelines for processes and how to organize work and objects related to ClickLearn Studio.

## 2. ClickLearn terminology

ClickLearn Studio is an application with which authors can record business processes in IT systems. The application runs on Microsoft Windows and must be installed on the client computer which runs the application an author wants to record. The following chapter will outline the native ClickLearn file formats and how they relate to important objects in the application, and their criticality and file sizes. The chapter will also outline why and how basic file management principles should be applied in your work with ClickLearn Studio.

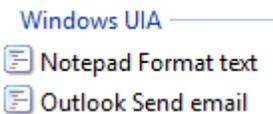
## ClickLearn file formats

A file format is a standard way that information is encoded for storage in a computer file. A native file format refers to the file format which the application is designed to work with. File formats are easily identifiable by their filename extension (a filename extension is an identifier specified as a suffix to the name of a computer file – i.e. such as \*.pdf for PDF files). ClickLearn Studio saves information in several native file formats, namely:

- Files saved with the filename extensions .clrx, .clbx, .clsx and .clnhx are used by ClickLearn Studio to save an author's work with content prior to deployment and distribution to end-users. They cannot be deployed directly to any platform, but only used inside ClickLearn Studio.
- Files saved with the filename extension .clwx are used by ClickLearn Studio to save various settings and custom templates.

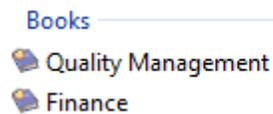
## Recording

When a business process has been recorded with ClickLearn Studio, the author is asked by the application to save the recording as a file with the filename extension .clrx. The recording can then be edited, translated, and produced from within ClickLearn Studio to documentation and training materials in various video formats, as well as webpages, docx, pptx and pdf formats.



## Book

A book in ClickLearn Studio is an object which can contain one or more recordings. Using books is a useful way to organize several recordings within a given topic. Producing a book with ClickLearn Studio will create content files which can be deployed in a variety of ways. Books are saved as a file with the filename extension .clbx.



## Shelf

A shelf in ClickLearn Studio is an object which can contain one or more books. Using shelves is a useful way to organize many recordings into several topics (books). Producing a shelf with ClickLearn Studio will create content files which can be deployed in a variety of ways. Shelves are saved as a file with the filename extension .clsx.

Shelfs

-  Complete Learning Portal for IIS
-  Complete Learning Portal for SP

### File size and criticality

As recording files always contain one image per recorded step (and possibly also other images added via notes and bookmarks), file size will grow with the number of steps a recording contains.

Type	Size
CLRX File	15.196 KB

Book and shelf files primarily contain settings and references to other objects, and are therefore mostly insignificant from a file size aspect. But keep in mind, producing a book or shelf may create a large number of content files, depending on the number and size of the recordings used.

As recording files contain captured screenshots, and can contain custom text and translations, these files should be saved in a location secured from data loss. Book and shelf files should also be saved in a secure location, but are easier to recreate from scratch if necessary.

### Template

ClickLearn Studio is a very flexible solution when it comes to configuring the output of the contents you want to produce and distribute to end users. An author can create a number of workspaces which can contain templates for different scenarios. Templates can control settings such as logos, colors, video and thumbnail sizes, and the template documents to use for producing word/pdf and ppt documents with ClickLearn Studio.

Recording template	cronus-recording	
Book template	cronus-book	
Shelf template	cronus-shelf	

### Workspace

A workspace in ClickLearn Studio is a special repository which may contain information about one or more templates. If sharing the file amongst multiple ClickLearn authors, templates and their settings can be shared. Workspace files are saved as a file with the filename extension .clwx.

### 3. File management in ClickLearn

The data a user works with on a computer is kept in a hierarchical file system where directories contain files and subdirectories. File management describes the fundamental methods for naming, storing and handling files.

#### Storing ClickLearn files - single author scenario

If only one person in an organization is designated as a ClickLearn author, ClickLearn files can be stored either locally, typically on the computer's C:\-drive, or centrally on a network drive. Most organizations today have access to network drives which are secured from data loss, and then this is preferable.

#### Storing ClickLearn files - multiple authors scenario

In the case of multiple ClickLearn authors running ClickLearn Studio on multiple Windows pcs, perhaps on several parallel or one central project, using a network drive for storing ClickLearn files should be preferred. However, ClickLearn authors and IT staff should be advised ClickLearn Studio currently does not have a way to either lock files in use, or notify an author if a file is currently opened by other authors. If two authors access and make edits to the same ClickLearn object simultaneously, the author who saves last will "win", i.e. edits from the author who saves first will be lost, overwritten by the other author. To avoid this, make sure authors openly communicate which shared objects they are working on. Following basic file management principles also becomes important to avoid overwriting another author's work.

#### File management

Applying basic file management principles to your work with ClickLearn files, has several advantages. Here are some principles to consider:

- File naming conventions
- Folder naming conventions
- Folder structure

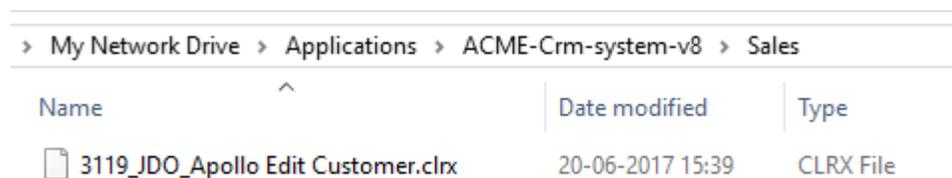
Naming conventions for files and folders can include data such as:

- Project name or number
- Author initials or employee number
- Application name (of the application recorded)
- Application version

- Application area
- Process name or number

The naming conventions should make it easy to identify files and folders, and possibly which author is currently responsible for them, or working with them. The folder structure should support the naming conventions in a logical way. Naming conventions can take many different shapes and forms, and many organizations already have naming conventions in place. Here are a few examples as inspiration.

EXAMPLE 1



Name	Date modified	Type
3119_JDO_Apollo Edit Customer.clrx	20-06-2017 15:39	CLRX File

In example 1 the screenshot from Windows Explorer displays a folder which contains a ClickLearn recording file. Folder naming convention and structure applied means recordings are stored after the area in the applications in which they have been recorded. File naming convention applied makes it easy to identify the responsible author (JDO, Jane Doe), the process (by process numbers, here 3119), as well as the project (Apollo).

EXAMPLE 2



Name	Date modified	Type
Outlook Send email.clrx	08-08-2017 10:43	CLRX File

In example 2 the screenshot from Windows Explorer displays a folder which contains a ClickLearn recording file. Simpler file and folder naming conventions are used in this example, which still makes it easy to identify the application by the filename, and the author responsible for the recording by the folder it resides in.

Important: When saving a file with ClickLearn Studio, the application will always suggest the latest location a file was opened or saved from.

## Metadata

Metadata is data that provides information about other data. Some examples include:

- Means of creation of the data
- Purpose of the data
- Time and date of creation
- Creator or author of the data
- Location on a computer network where the data was created
- Standards used
- File size

Three distinct types of metadata exist: descriptive metadata, structural metadata, and administrative metadata.

- *Descriptive* metadata describes a resource for purposes such as discovery and identification. It can include elements such as title, abstract, author, and keywords.
- *Structural* metadata is metadata about containers of data and indicates how compound objects are put together, for example, how pages are ordered to form chapters. It describes the types, versions, relationships and other characteristics of digital materials.
- *Administrative* metadata provides information to help manage a resource, such as when and how it was created, file type and other technical information, and who can access it.

A ClickLearn author can add metadata to recordings, books and shelves, and metadata can be displayed in various formats produced with ClickLearn Studio, such as Microsoft Word, PDF and PowerPoint.

All three types of metadata can be applied to ClickLearn objects to add information into document files produced with ClickLearn Studio such as date & time, author name, etc. Using metadata can help your organization keep track of content (what keywords relate to this content, who has access to it) and change management (which version, when was it last updated, by whom).

## 4. Organizing content

Using both file management principles and metadata as laid out in the preceding chapters, can be helpful ways of organizing recordings, books and shelves, both as ClickLearn objects in the application as well as the corresponding files on your local or network drive. This following chapter is about organizing your documentation and learning content.

## Target audience

Your target audience are the end-users which will consume the content you produce with ClickLearn. They are the ones whom you create content for. Your target audience is important to keep in mind when organizing your content. Content should always be organized in a way, which is intuitive for them to navigate and browse, and which makes it easy for them to find the content they need.

## Keeping recordings clean

One of the main benefits of recording with ClickLearn Studio is the application will automatically capture screenshots and insert matching instructions. Authors always have the option to overwrite automatically captured instructional texts with their own. This should be avoided whenever possible to ensure recordings can be easily updated, translated and/or tested through Replay.

Content in a recording can be organized using chapters and subchapters. Both can serve as headings in documents produced with ClickLearn. For example, if a document produced from a recording should begin with a paragraph named "Introduction", with a couple of lines explaining what the recording is about, this can be achieved by inserting a chapter named "Introduction", followed by a note with the paragraph text. Using chapters and subchapters will help end-users navigate the documentation and better understand the contents.

## Topics

In technical communication, topic-based authoring is a modular approach to content creation where content is structured around topics that can be mixed and reused in different contexts. It is defined in contrast with book-oriented or narrative content, written in the linear structure of written books.

In general, books in ClickLearn Studio can serve as topics. For example, if your documentation/training project contains several recordings within the topic of invoicing, you can create a book with that name and add the relevant recordings to the book. Producing the "Invoicing" book in ClickLearn, will create a fully indexed word document and html-documents for a fully searchable website for this entire topic. When you update and save new content to one or more of the recordings used in the book, you only need to produce the book again, and the word and html-files will be updated accordingly.

The question of how to choose and name topics then arises. In general, choosing and naming topics for your content should always be aligned with the end-user experience in the application you are documenting with ClickLearn Studio. Use terms and wordings end-users are familiar

with. For example, if an area in the application deals with invoicing, but end-users know it by a different internal company term, carefully consider which one to use in the documentation.

In ClickLearn Studio books can be organized into shelves. This provides authors with additional levels for organizing content. Below is a complete overview displaying all levels with which content can be organized in ClickLearn.

- Shelf
  - Chapter (set inside the shelf)
    - Book
      - Recording
        - Chapter
          - Subchapter
            - Recorded step or inserted note

## Multiple shelves

The shelf object in ClickLearn Studio can be produced and deployed as a fully searchable website, containing all other document and video formats produced with ClickLearn. If the number of levels available in ClickLearn Studio for organizing content still isn't adequate for a specific documentation or training project, working with several shelves can be an option. As with recordings and books, there is no license limitation to the number of shelves which can be created and produced with ClickLearn.

## 5. Languages in ClickLearn

Many organizations face requirements to produce documentation and work instructions in multiple languages. Using ClickLearn, an author will be able to save both time and resources on a translation process. But it is important to note, working with translation and multiple languages can still be a time-consuming and costly process. In the following chapter, we will go through the steps in a typical, professional translation process.

### Translation process

When a text is proofread and validated by the text validator, it may be considered as ready for translation. The text is then marked as "locked for translation", essentially blocking authors from making further changes to it.

The text is then handed over to the translator. The translator can be both an internal or external resource. Some organizations work with internal translators, while others work with external language providers, and the translators accessible through them.

The translator will then translate the text into the target language and hand the translation over to the translation validator. Ideally the translation validator should have the target language as his or her primary or secondary language, and specialist knowledge about the language domain, which is used in the text. I.e., if the text describes techniques used in windsurfing, the validator must have knowledge about windsurfing words, wordings and terms in both source and target language.

The translation validator will then validate the translation, providing any necessary feedback to the translator, to ensure the quality of translation in the used language domain is improved over time, making it less and less time-consuming to both translate and validate translations.

[Figure showing translation process]

Once the translation is validated, the translated text is handed back to the author/owner, and is ready for publication.

### Statistical Machine translation (auto-translation)

The Internet will today provide everyone with access to powerful online translation tools such as Google Translate and Microsoft Translator, which use statistical machine translation to translate text. Statistical machine translation is a machine translation paradigm where translations are generated on the basis of statistical models whose parameters are derived from the analysis of bilingual text corpora. The statistical approach contrasts with the rule-based approaches to machine translation as well as with example-based machine translation.

Because statistical machine translation is based on statistical models on already existing and available translations, using the method to translate texts within certain specialist language domains can have results that vary a lot. This also becomes apparent when performing a simple test on any of the available online tools.

### Working with languages in ClickLearn Studio

The following concepts in ClickLearn Studio are important when dealing with multiple languages.

- Auto-translation
- Replay
- Speech Editor
- Templates

## Auto-translation

Auto-translation connects ClickLearn Studio with the machine translation service provided by Microsoft, known as Microsoft Translator. Keep in mind, the quality of the auto-translation feature is only as good as statistical machine translation can be. Be prepared to validate texts translated with auto-translation.

The feature is available in relevant text fields across the application. The feature enables the author to have Microsoft Translator translate a text field into any of the languages enabled in ClickLearn Studio, at the click of a button.

## Using Replay for translation

The powerful Replay feature enables authors to *record* a process from an application in one language (source language) and *replay* the recording of the process in the same application set with another language (target language). I.e. record a process in application X in English, and then set application X's language to Spanish, and replay the recording on application X. ClickLearn Studio will capture and add Spanish screenshots and instructional text of application X to the recording. This enables the author to produce the documentation and training materials from the recording in both languages, in an efficient way. The Replay feature will be explained in further detail in a separate guide.

## Speech editor

ClickLearn uses Text to Speech to transform process instructions and notes into narration in the video material produced with ClickLearn Studio. A word or abbreviation may cause mispronunciation. Using the Speech Editor in ClickLearn Studio, an author has the ability to manage speech transformations.

For example, the abbreviation "e.g." may cause the voice to pronounce it as "e-dot-g-dot". By adding a row for language "English (United States)", with Word/Abbreviation "e.g." and Transform into set at "for example", the voice will pronounce all occurrences of "e.g." in your texts as "for example".

Changes made in Speech editor are saved into the ClickLearn Studio workspace, and can be shared with other ClickLearn authors, making it useful to ensure consistent and correct pronunciation in videos produced with ClickLearn Studio.

## Using templates with languages

The ClickLearn template for recording contains all standard words and phrases used for captured instructional text., such as “Click on navigation tab” etc., sorted by the application and version in use. All text can be exported and edited (retranslated, or translated to languages not previously used with ClickLearn) easily via Excel export/import. For example, if it is deemed as necessary to change the standard phrase “Click on..” to “Please click on..” in all future recordings, this can be achieved using the template.

## Appendix

<https://en.wikipedia.org/wiki/Metadata>

[https://en.wikipedia.org/wiki/Native\\_and\\_foreign\\_format](https://en.wikipedia.org/wiki/Native_and_foreign_format)

[https://en.wikipedia.org/wiki/File\\_format](https://en.wikipedia.org/wiki/File_format)

[https://en.wikipedia.org/wiki/Topic-based\\_authoring](https://en.wikipedia.org/wiki/Topic-based_authoring)

[https://en.wikipedia.org/wiki/Graphical\\_user\\_interface\\_testing](https://en.wikipedia.org/wiki/Graphical_user_interface_testing)

<https://translate.google.com>

<https://www.microsoft.com/translator>

[https://en.wikipedia.org/wiki/Statistical\\_machine\\_translation](https://en.wikipedia.org/wiki/Statistical_machine_translation)