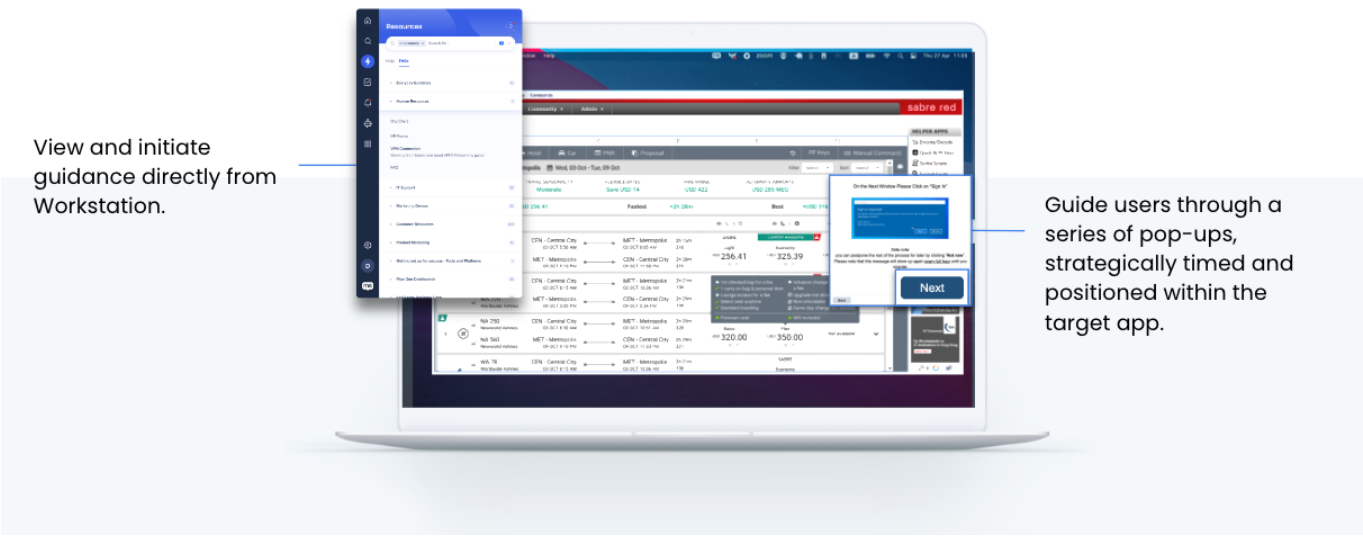
Workstation In-App Guidance

Brief Overview

Workstation supports in-application guidance on top of any desktop application. By using this, you can create popup steps in a specific location within an application window.



Note

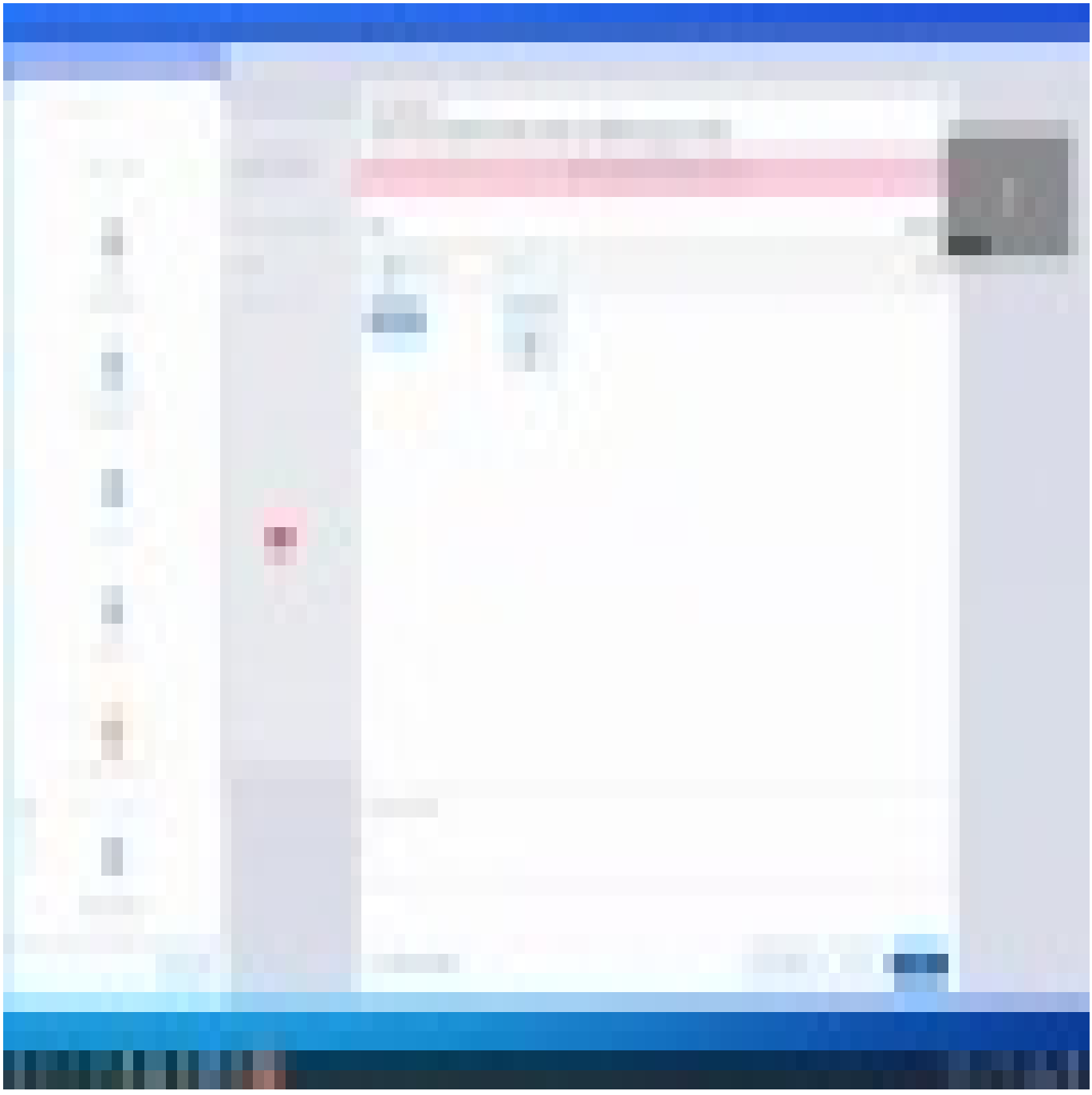
In-App Guidance is a paid feature and cannot be enabled out-of-the-box to all customers.

Product Comparison Guide

	Workstation In-App Guidance	**Workstation for SAP**
Supported Items	Smart Walk-Thrus, Popup Steps, Resources	All
Product Summary	Popup guidance on top of any desktop application	Contextual guidance for SAP ECC
Element Recognition and Capturing		

Deployment Method	Workstation Deployment	Workstation Deployment
Balloon Positioning	Any location in application window	Attached to On Screen Element

Demo Video



Get to Know and Use

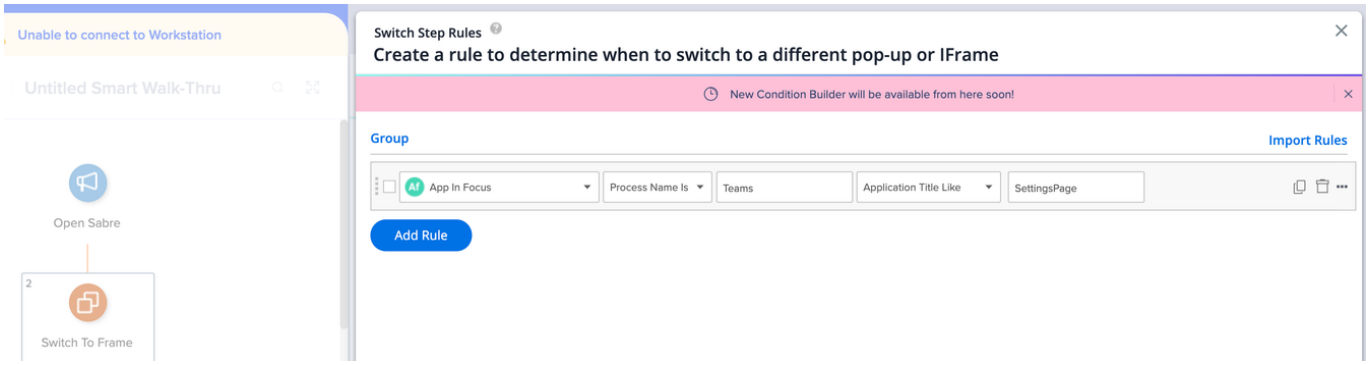
Set Conditions for In-App Guidance Switch to Frame Step

Leverage Switch to Frame rules as an indicator for when a Smart Walk-Thru should be able to play in-app and in which app.

To set a rule for when a Smart Walk-Thru should play in-app, follow these steps:

1. Click **Set Condition** to create a rule
2. Select the rule **App in Focus** to enable in-app popup playing
3. The rule will provide an indication of ProcessName and AppTitle – Please select which is suitable for you:
    1. **ProcessName**: Any Process Name / Process Name Is / Process Name Like
    2. **AppTitle**: Any Application Title / Application Title Equals / Application Title Like
        - **Note**: This field is optional

All following steps in this Smart Walk-Thru will aim to appear inside the defined App In Focus.



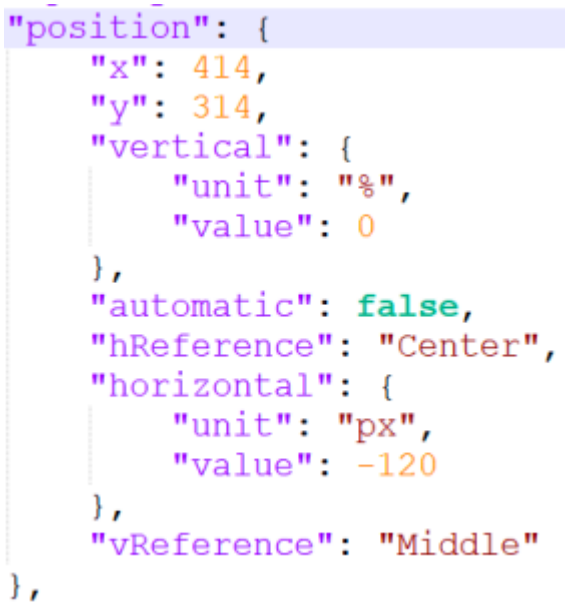
```
"ConditionTrees": {
    "Branch": {
        "Root": {
            "Nodes": [],
            "Id": 13677378,
            "Type": 0,
            "Settings": {
                "funcName": "ProcessExistsWithNameEquals",
                "funcArgs": {
                    "ProcessName": "Slack"
                }
            }
        },
        "Id": 6926484,
        "ConditionType": "Branch"
    }
}
```

Example

Where to Show In-App Guidance

Leverage the existing Data file reference for the balloon location settings (see reference image).

- Application window recognition (per Smart Walk-Thru)
- Balloon Position Settings
- Inside the app or outside the app



Balloon location settings

Size setting (see reference image)

- All content should stay in the app boundaries
- What should be the behavior when resizing? Same as in Workstation for SAP
- What should be the behavior when dragging the content? Same as in Workstation for SAP
- What should be the behavior when dragging the app? Same as in Workstation for SAP

Note

- Once a Smart Walk-Thru starts playing in one window it will not play in another until the first Smart Walk-Thru stops
- Smart Walk-Thru should start in the window in the front focused if multiple window are running

```
"size": {
    "units": "Absolute",
    "width": {
        "auto": false,
        "unit": "px",
        "value": 300
    },
    "height": {
        "auto": false,
        "unit": "px",
        "value": 140
    },
    "aspectRatio": 0,
    "aspectRatioLock": false
},
```

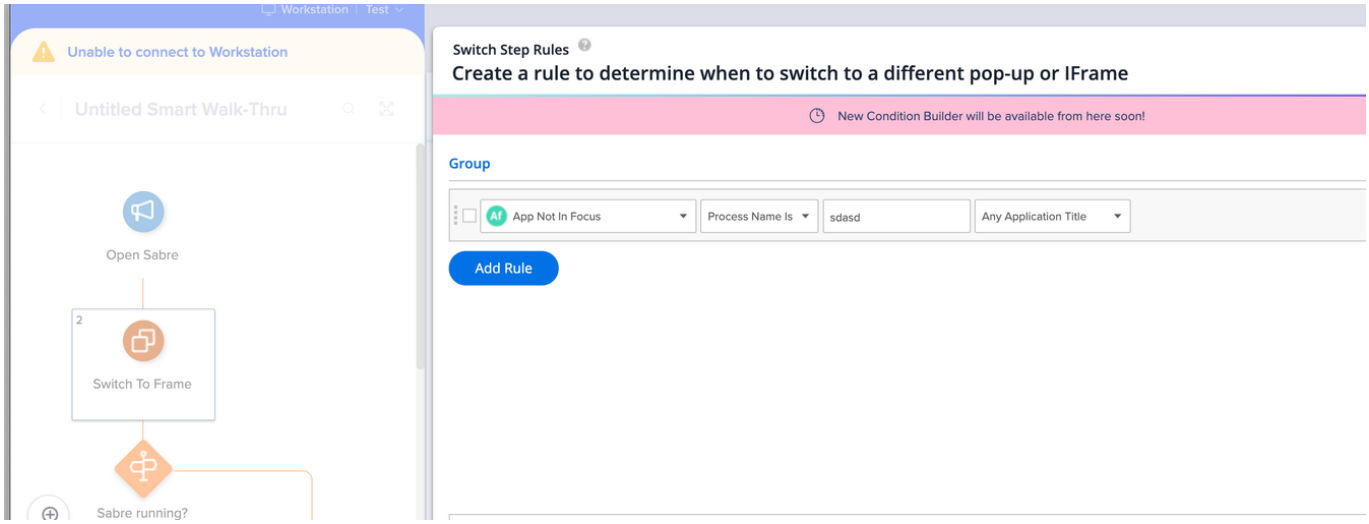
Balloon size settings

When to stop playing in-app guidance

The in-app guidance will stop when a App Not in Focus rule is applied to the Switch to Frame step. Follow these steps:

1. Click **Set Condition** to create a rule
2. Click **Add Rule**
3. Select the rule **App Not in Focus**

Note: Any following popups will play regularly (on display, not in-app)



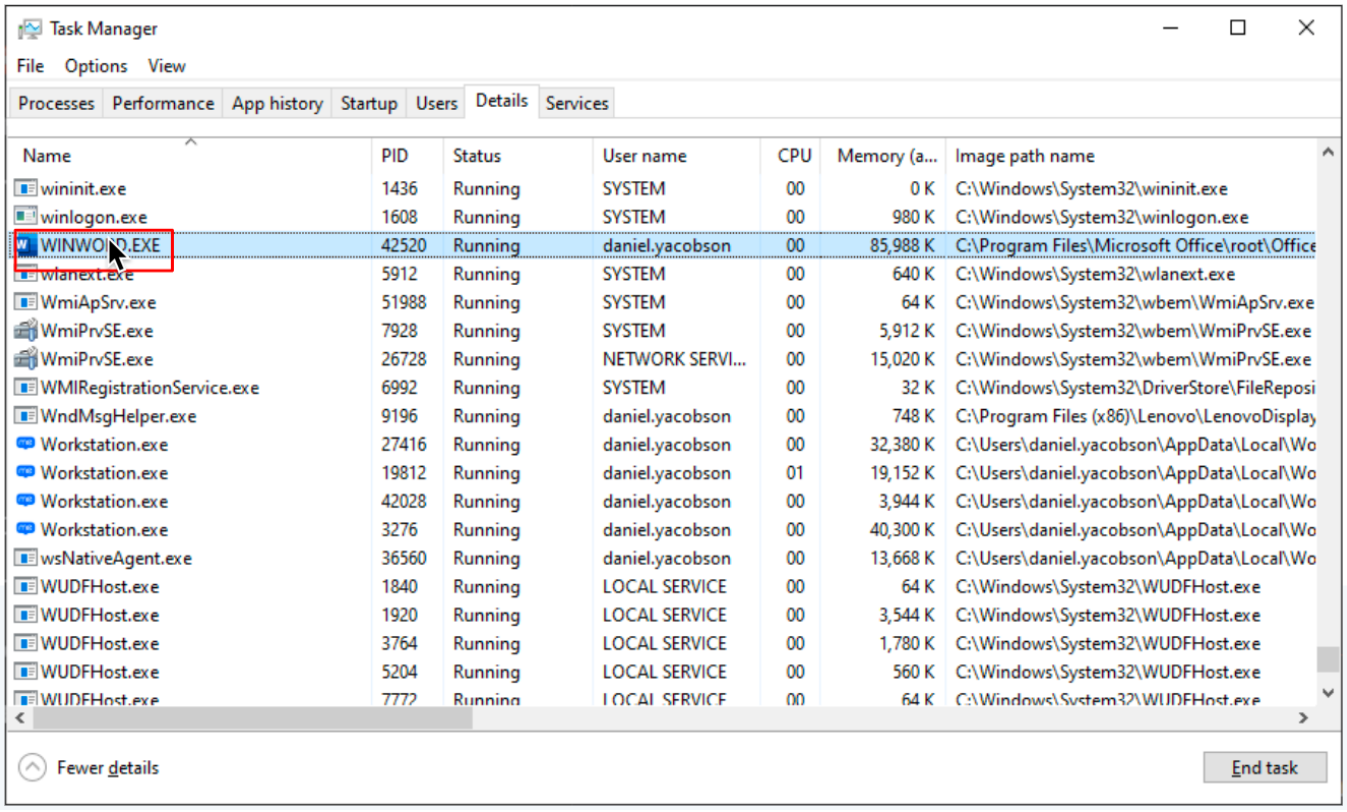
Filling Out App In Focus Rules

After selecting the App in Focus Rule, there are two typing field to fill out: ProcessName and AppTitle.

Below are some best practices for locating and filling out these fields.

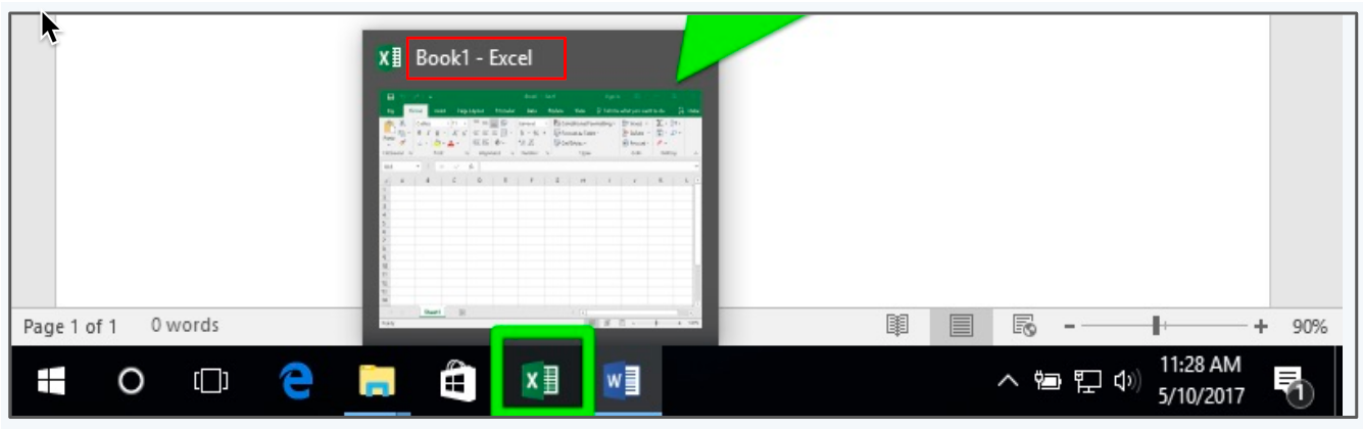
Finding Process Name

1. Open the **Windows Task Manager**
2. Press and hold **CTRL, Shift, ESC** on your keyboard
3. Copy the process name



Finding Application Title

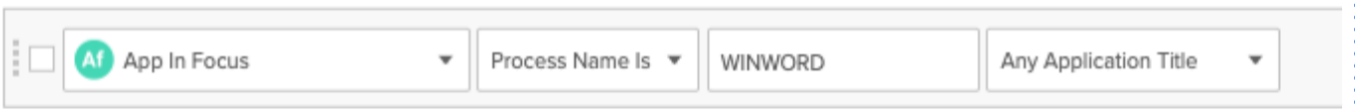
1. Open your desired desktop application
2. Copy the application title from the title bar



Filling Out App In Focus

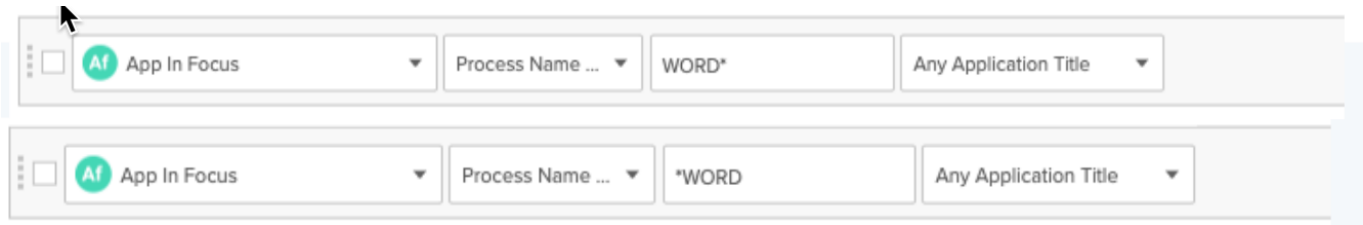
Process Name Is

- Works with and without **.EXE**
- Not case sensitive
- If more than one process with that name is running, Workstation will use the one in focus

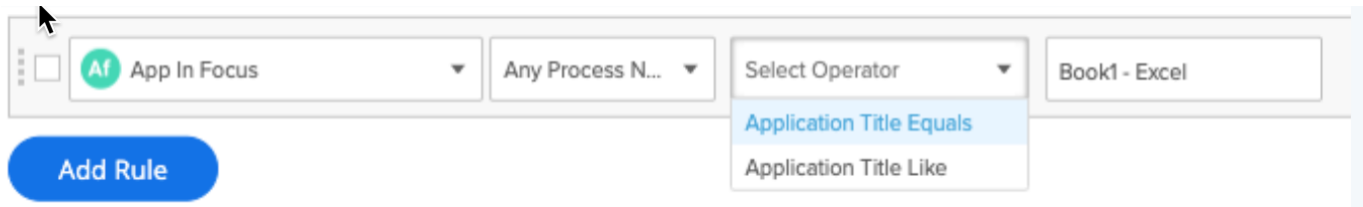


Process Name Like

- Add wildcard * before or after name according to variations
- Not case sensitive



Any Process Name (Requires Application Title)



Limitations

- Once a Smart Walk-Thru starts playing in one window it will not play in another until the first Smart Walk-Thru stops
- Only popup steps are supported