1. Administrative portal

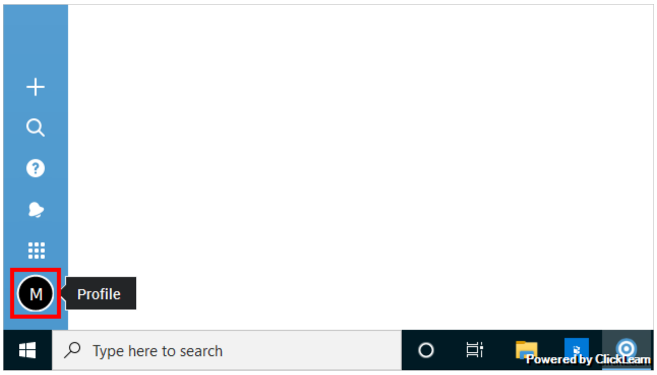
1.1. Unlocking Recordings and Project

This guide outlines the steps to unlock recordings and projects, as well as to check in files that are currently checked out.

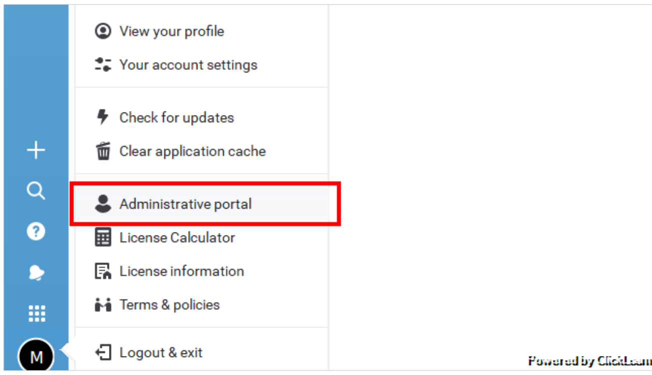
These steps should be carried out by a ClickLearn Administrator.

1.1.1. Accessing the Administrative portal

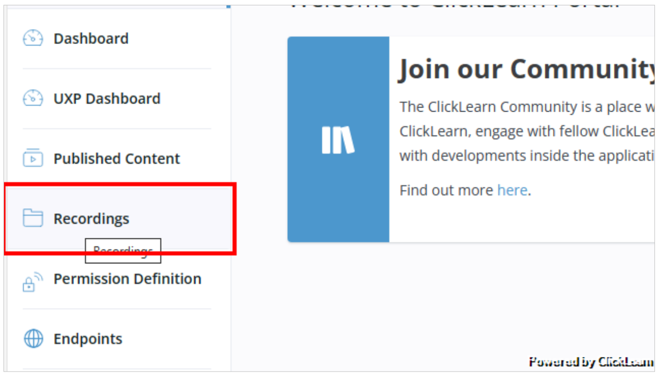
Click on **Profile**



Click on the **Administrative portal**

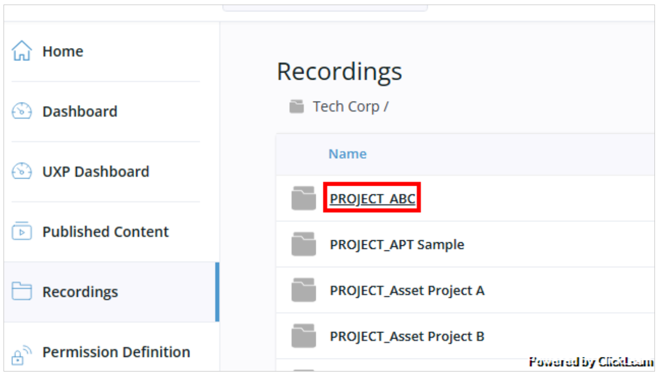


Click on the link **Recordings**

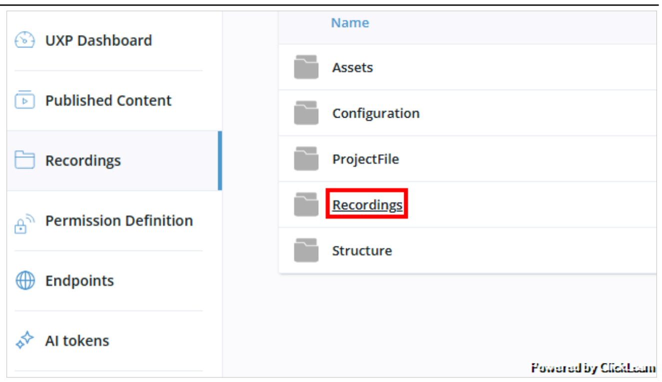


1.1.2. Unlocking a Recording

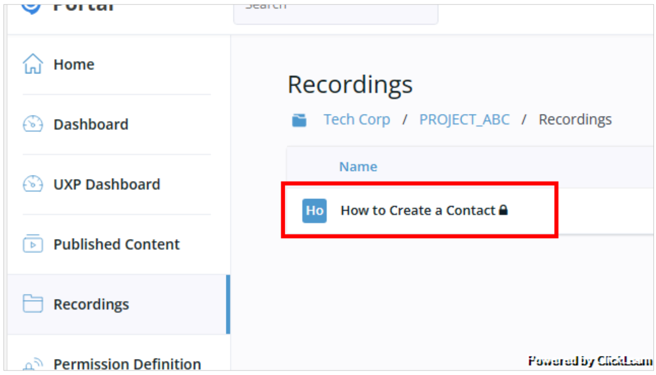
Click on the folder of the **project**.
Please note that the folder will have "PROJECT_" in front of your normal project name.



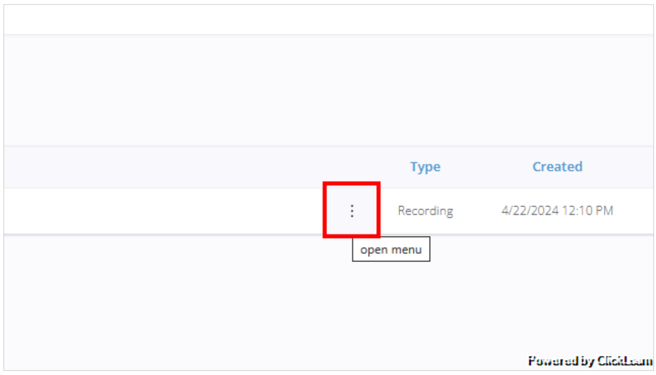
Click on the link **Recordings**



Click on the **Recording name**

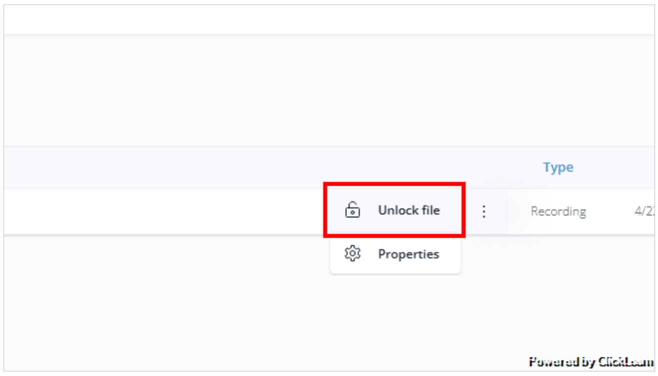


Click on the link **open menu**



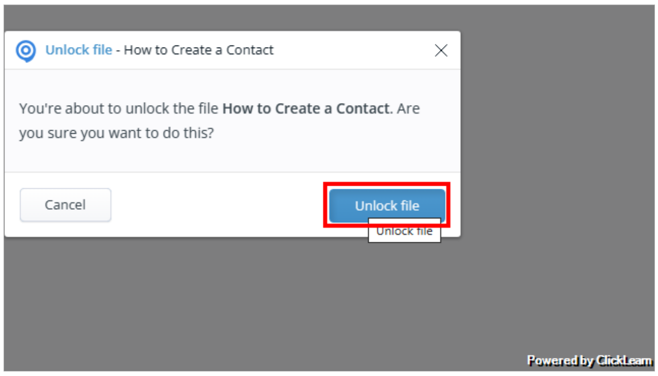
Click on the link **Unlock file**

NOTE: You can also use **Undo checkout.**



Click on the link **Unlock file**

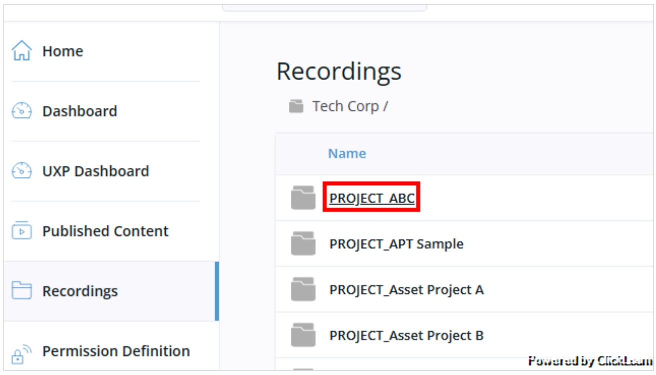
Your Recording has now been unlocked. You can return to ClickLearn Studio and refresh the list to edit the recording.



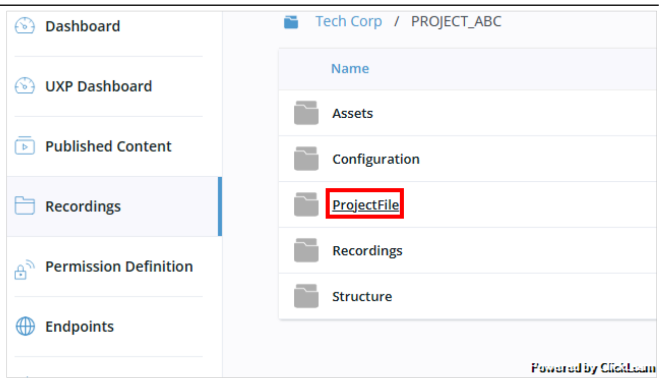
1.1.3. Unlocking a Project

Click on the **folder** of the project.

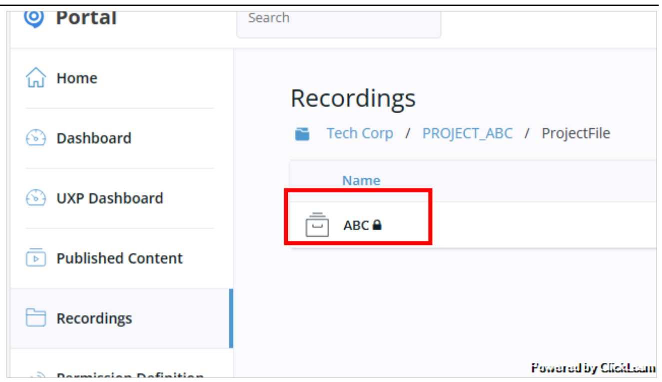
Please note that the folder will have "PROJECT_" in front of your normal project name.



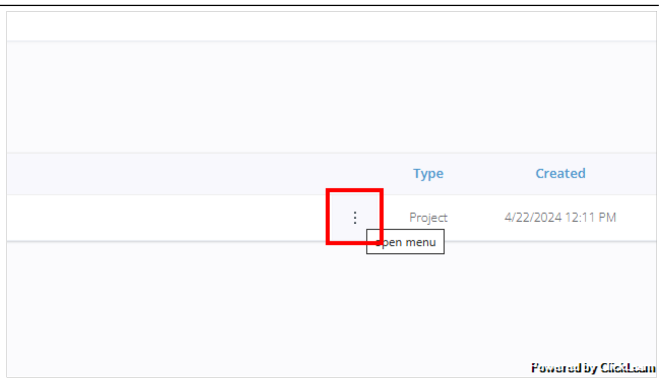
Click on the link **ProjectFile**



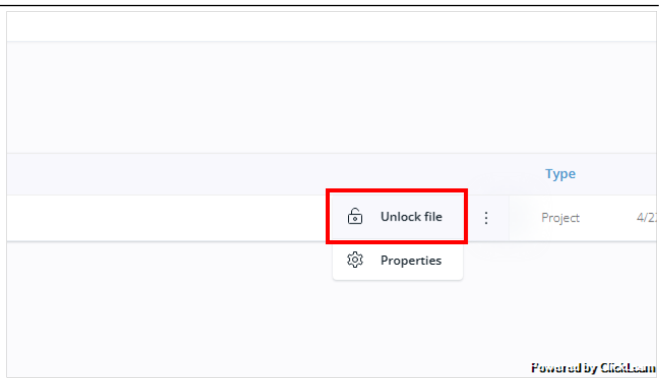
Click on the **Project file**



Click on the link **open menu**

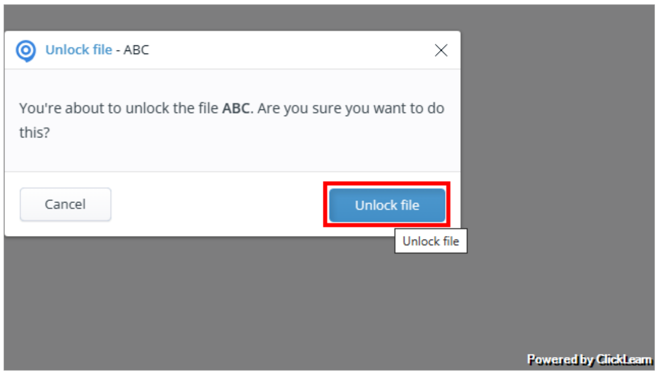


Click on the link **Unlock file**



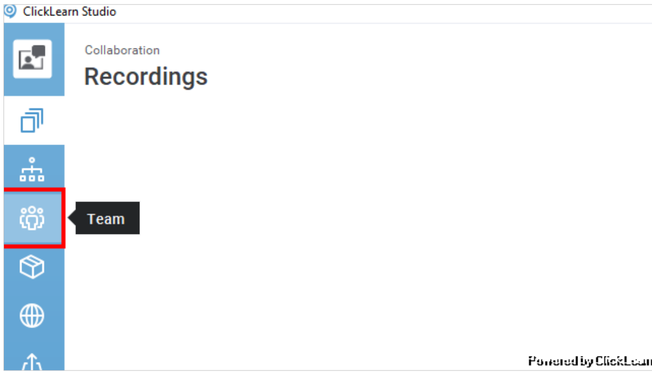
Click on the link **Unlock file**

Your Project has now been unlocked. You can return to ClickLearn Studio and refresh the list to edit the recording.

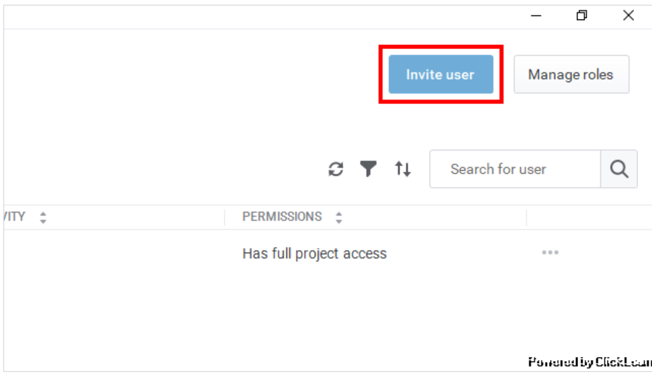


1.2. Adding Auhtors using ClickLearn Studio

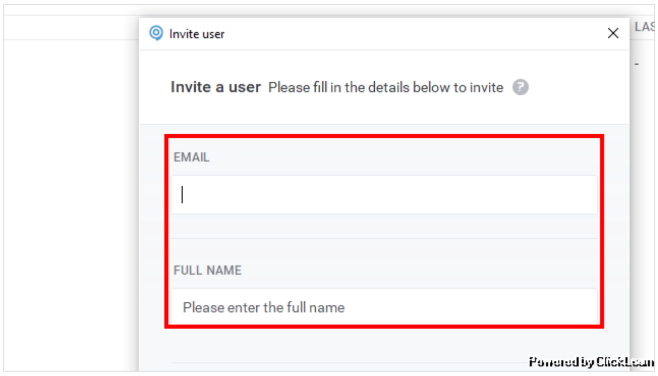
Click on the button **Team**



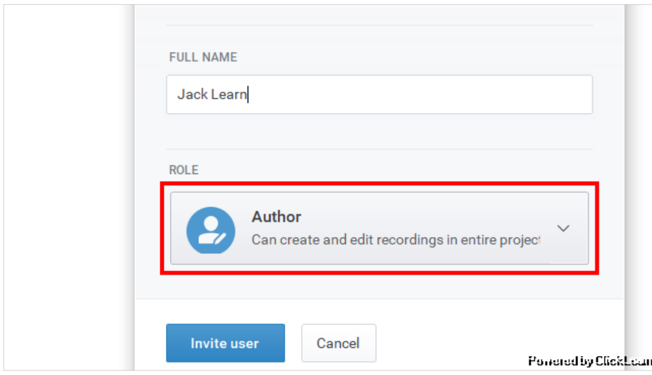
Click on the button **Invite user**



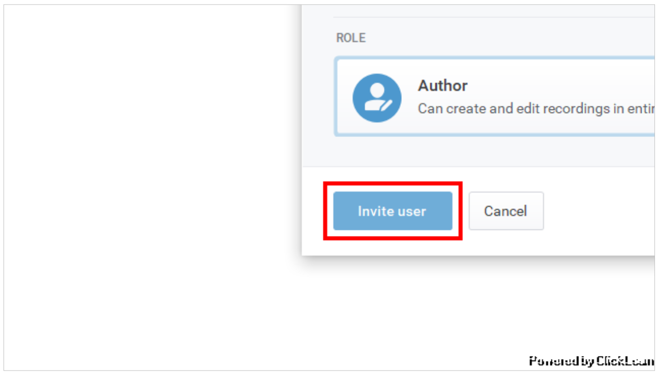
Click on the textbox **Email** and enter the new Author's email address, followed by their **first and last name**



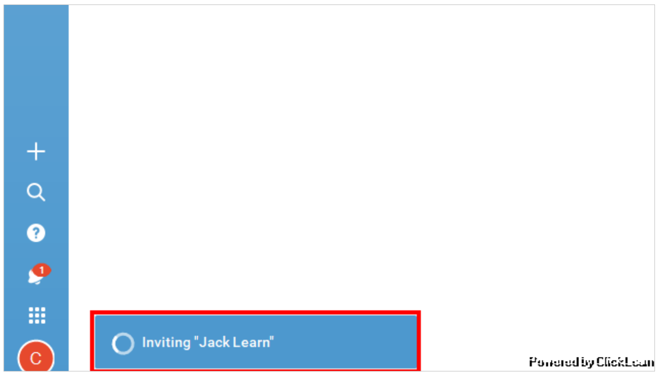
Click on the dropdown **User Role**



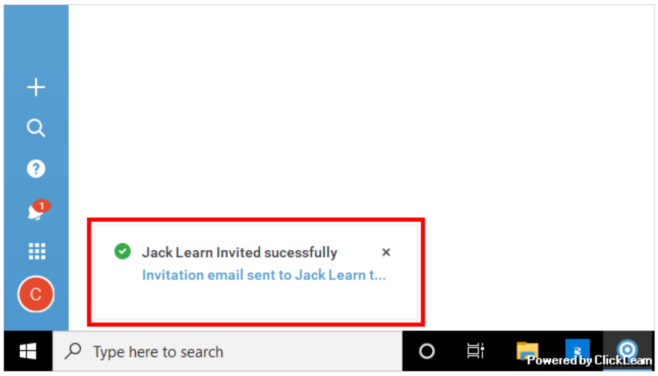
Click on the button **Invite user**

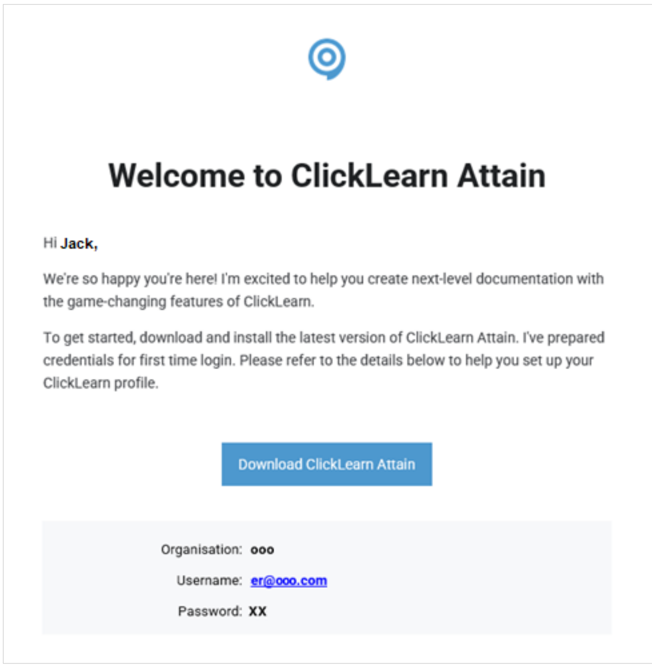


Wait while ClickLearn Studio **Invites** the Author



ClickLearn will inform you once the invitation has been sent to the Author.




Welcome to ClickLearn Attain

Hi **Jack,**

We're so happy you're here! I'm excited to help you create next-level documentation with the game-changing features of ClickLearn.

To get started, download and install the latest version of ClickLearn Attain. I've prepared credentials for first time login. Please refer to the details below to help you set up your ClickLearn profile.

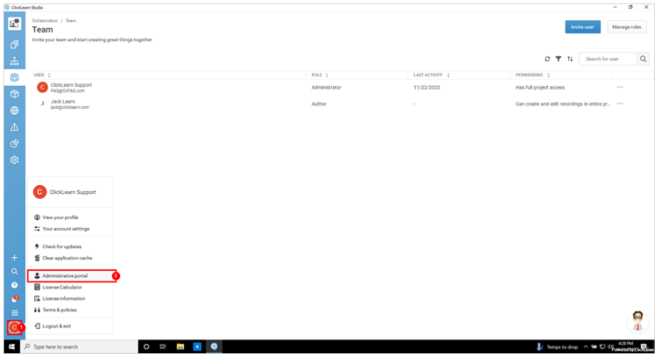
Download ClickLearn Attain

Organisation: **ooo**
Username: er@ooo.com
Password: **XX**

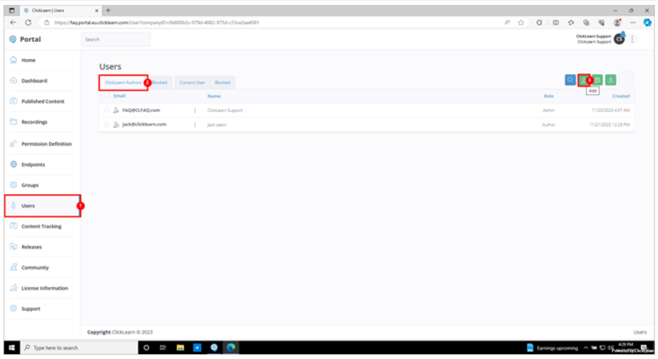
The invitation email will contain the Author's log in credentials and a download link for ClickLearn Studio similar to the image.

1.3. Adding Authors using the Administrative portal

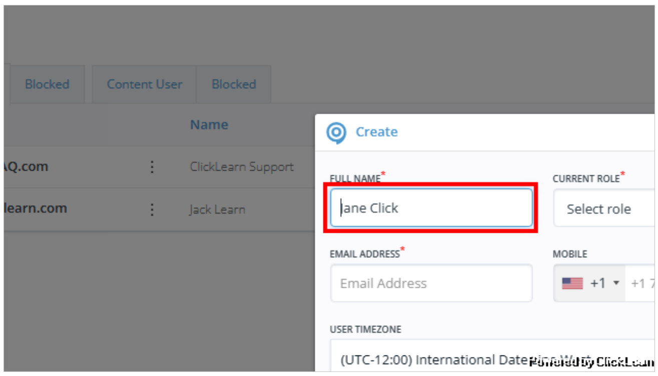
1. Click on the label **Profile**.
2. Click on the label **Administrative portal**.



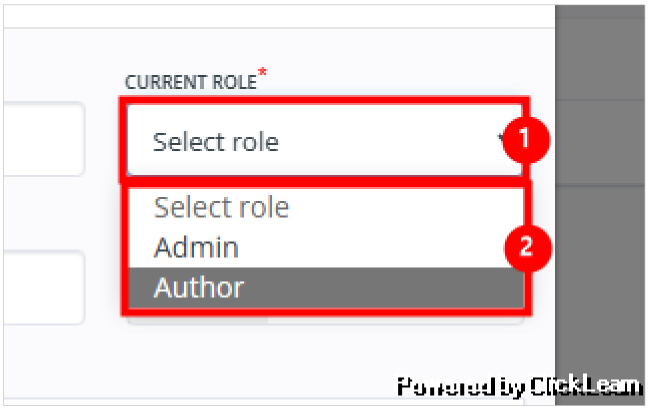
1. Click on the link **Users**.
2. Click on the link **ClickLearn Authors**.
3. Click on the link **Add**.



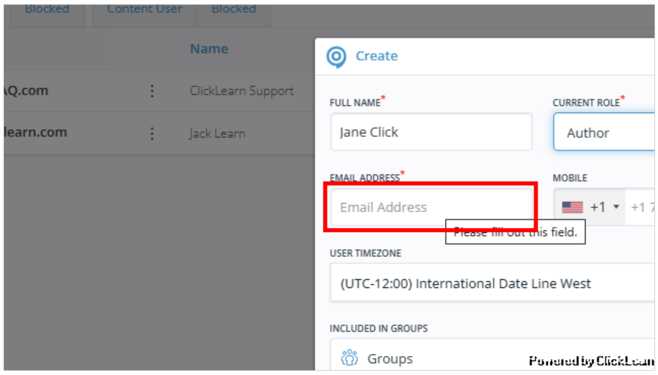
Click on the input field **Full name** and enter the new Author's name



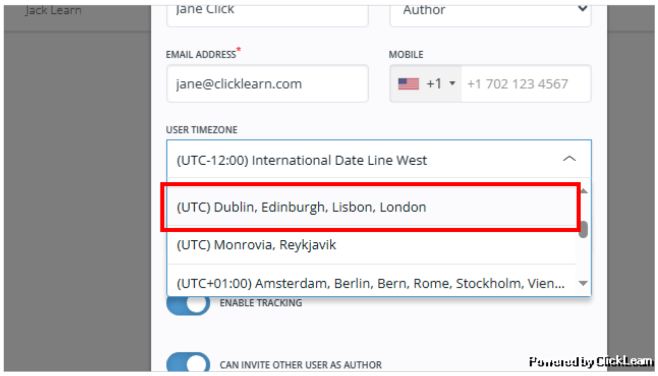
1. Click on the combo box **Current role**.
2. Click on the item **Author** in the list.



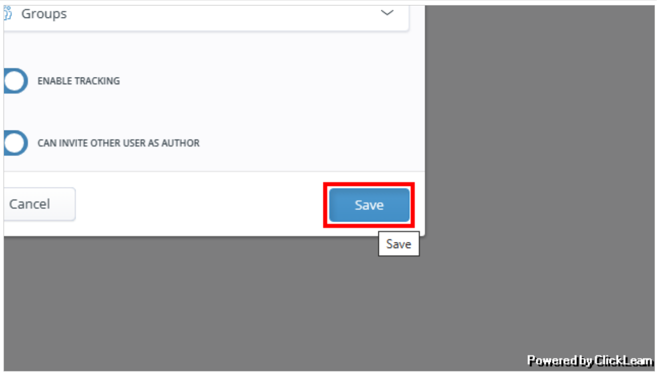
Click on the input field **Email Address** and enter the Author's email address



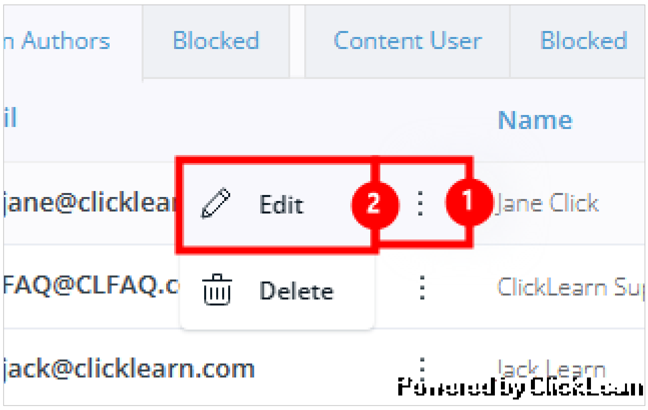
Select the Author's **time zone**



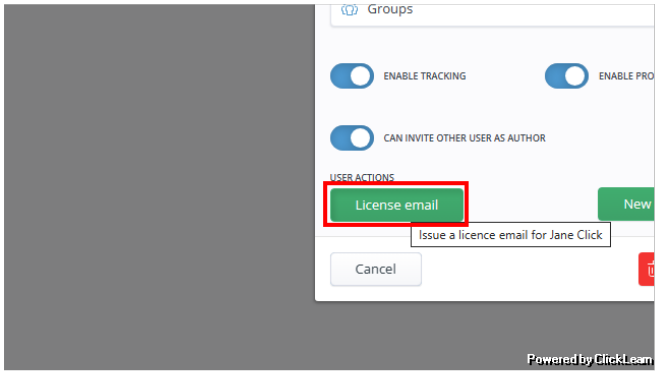
Click on the link **Save**



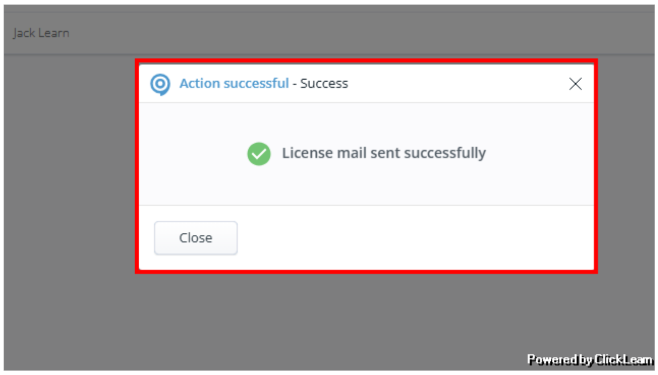
1. Click on the link **open menu**.
2. Click on the link **Edit**.



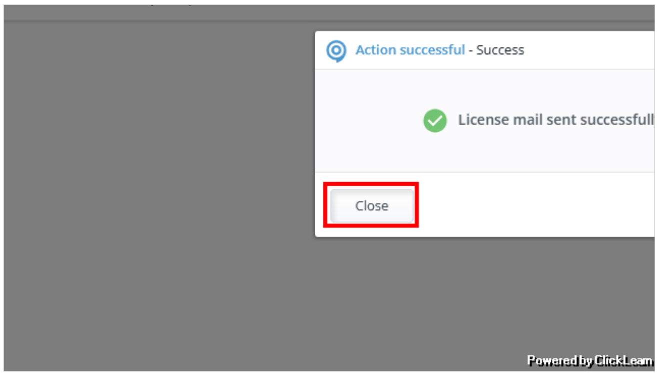
Scroll down and click on the link **licence email** to send the login credentials to the new Author's email address

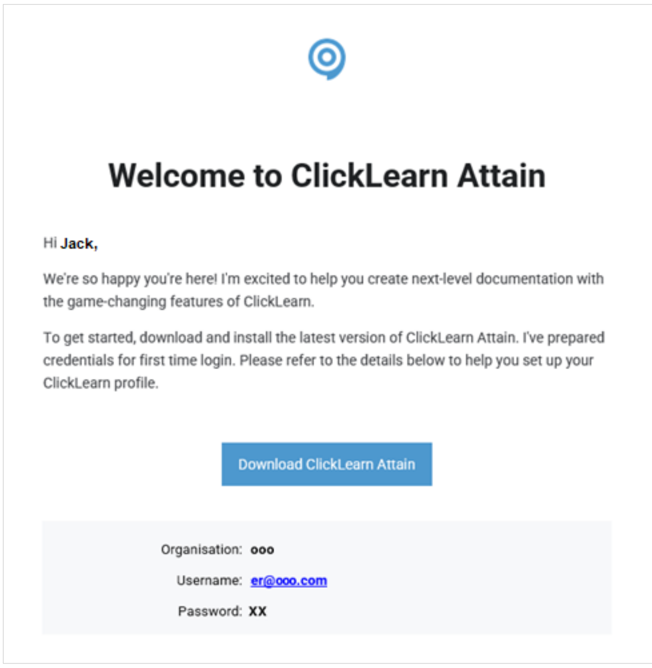


Click on **License mail sent successfully**



Click on the link **Close** to return to the main screen.



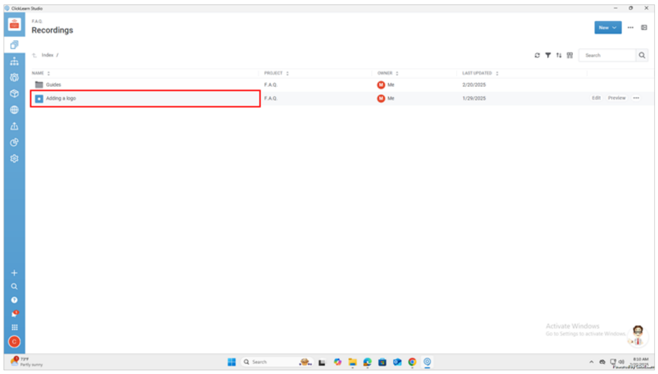


The invitation email will contain the Author's log in credentials and a download link for ClickLearn Studio similar to the image.

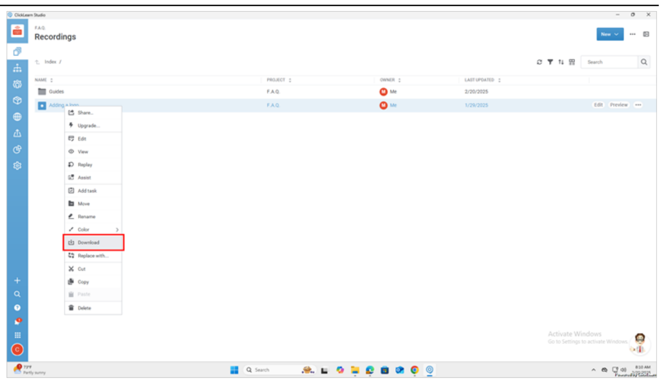
2. Navigation

2.1. How to download clrx file

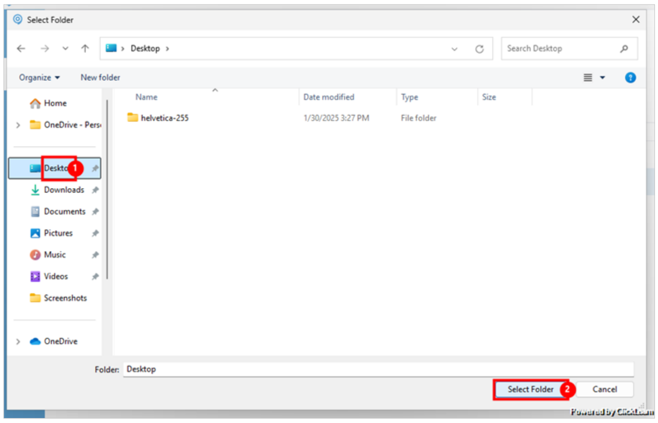
Right click on the **the recording**.



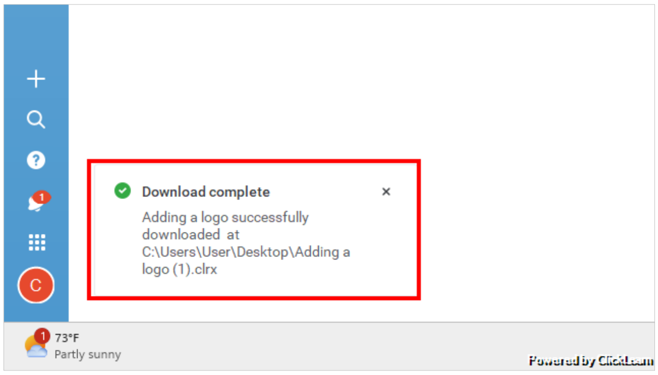
Click on the menu item **Download**



1. Click on the folder where you want to save **the recording**.
2. Click on the button **Select Folder**.



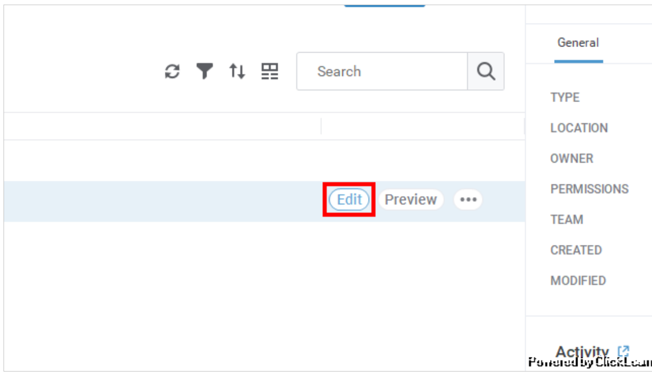
When the download is complete you will get a notification.



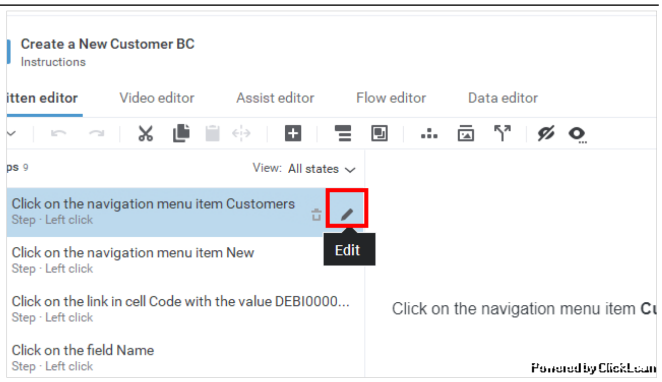
3. Settings

3.1. Creating missing languages

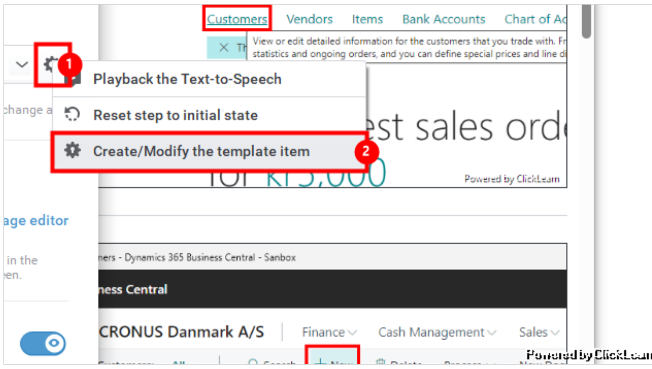
Edit any recording



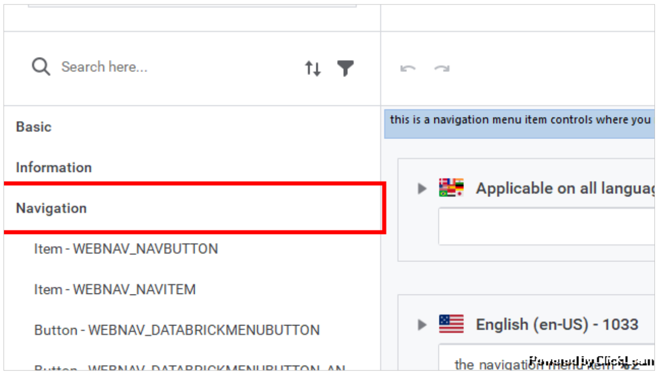
Select a step and click on the **Edit** icon



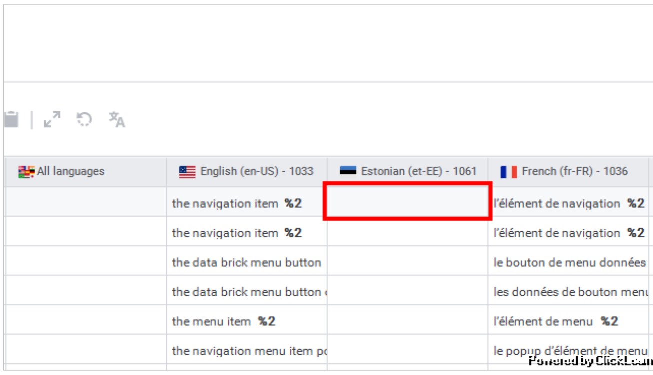
1. Click on the icon **Settings**.
2. Click on the menu item **Create/Modify the template item**.



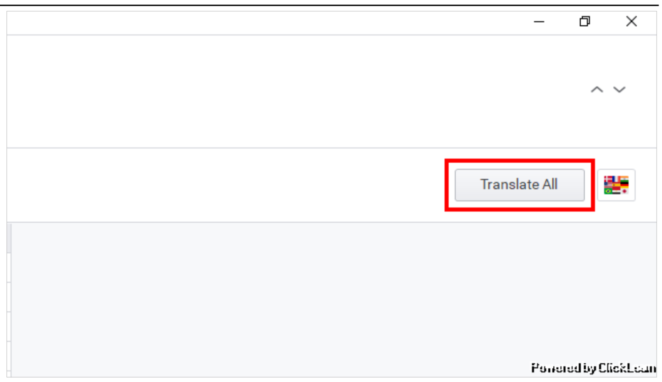
Click on the **bold** treenode



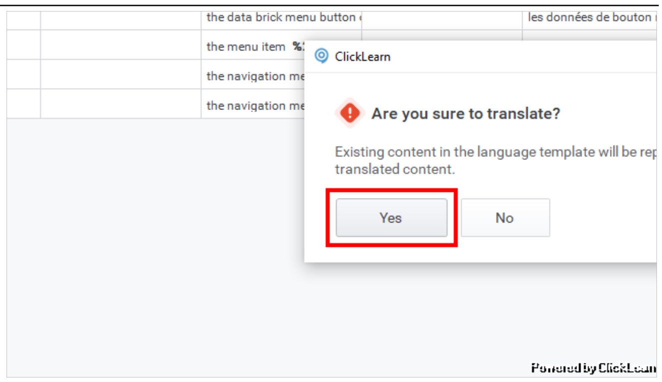
Note that the instruction for the language is empty



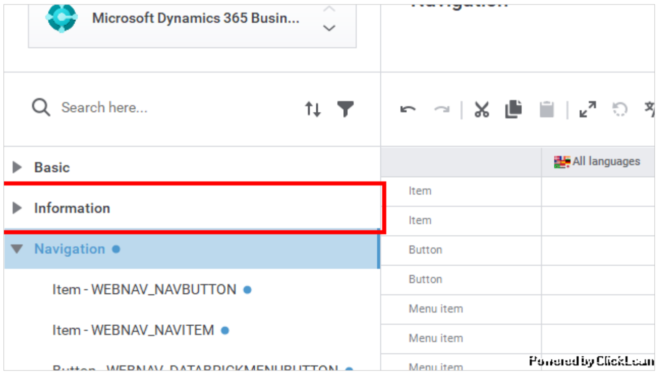
Click on the button **Translate All**



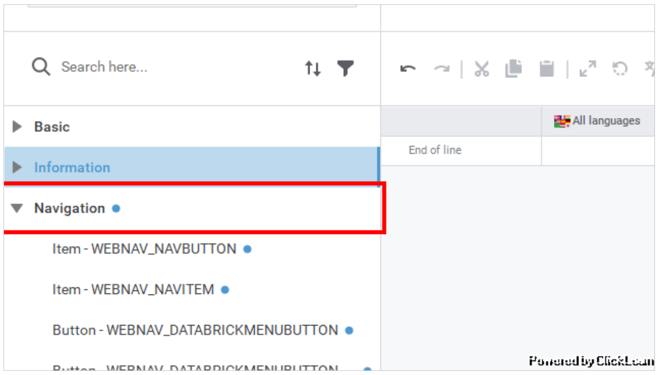
Click on the button **Yes**



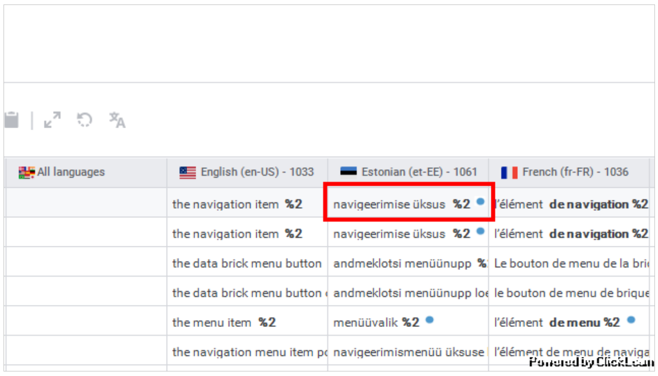
Click a different bold treenode



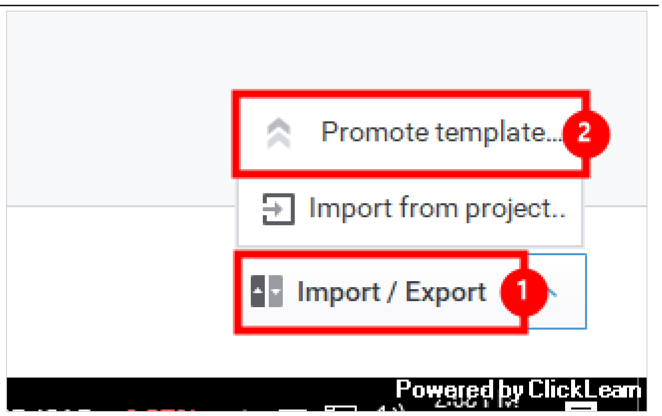
Click on the original bold treenode you had open



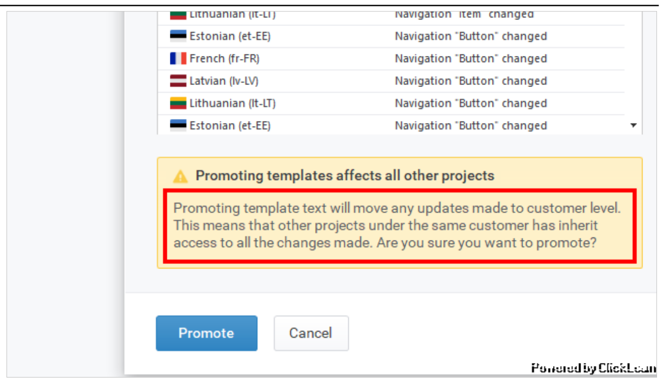
Note that the instructions have now been populated



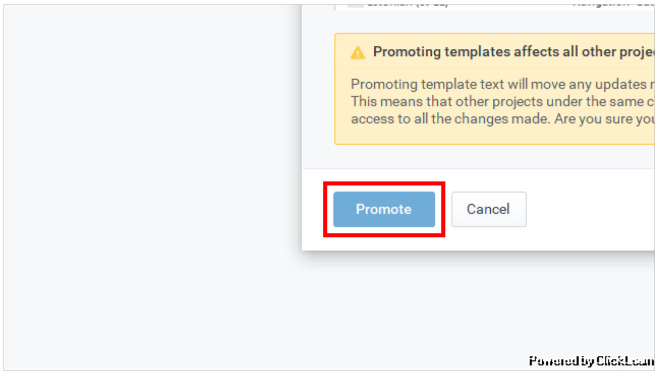
1. Click on the button **Import / Export**.
2. Click on the list view item **Promote template….**



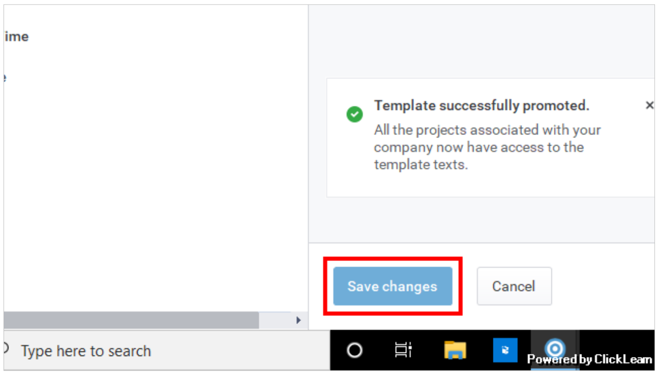
Promoting template text will move any updates made to customer level. This means that other projects under the same customer has inherit access to all the changes made.



Click on the button **Promote**



Click on the button **Save changes**

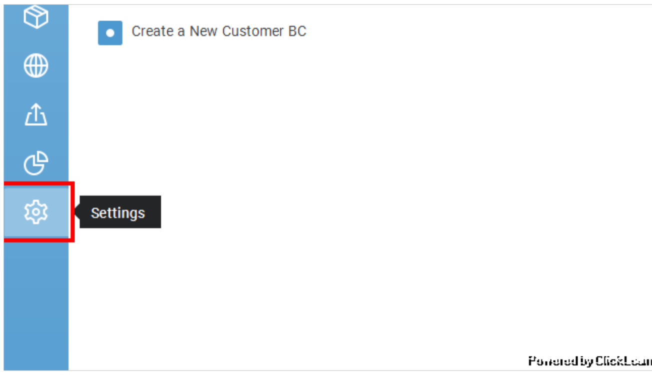


3.2. Creating Custom Metadata for Wrd

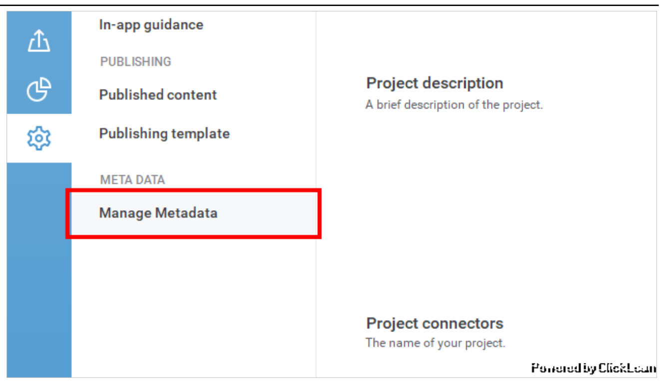
3.2.1. Step 1 - Create New Metadata

Part 1

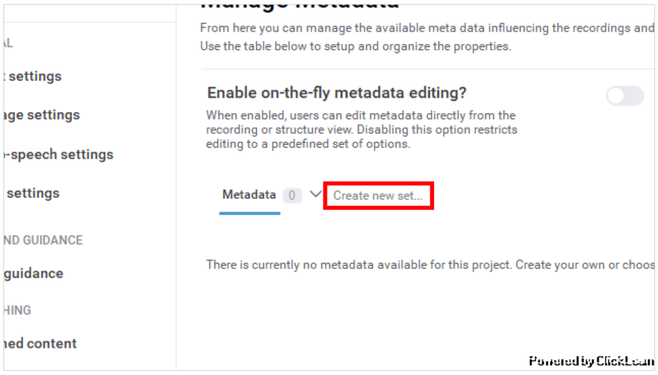
Click on the button **Settings**



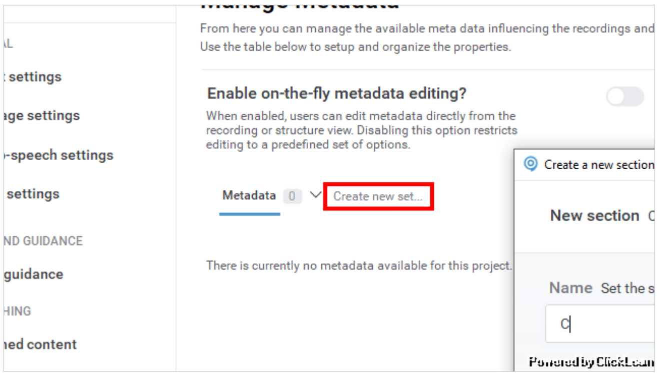
Click on the button **Manage Metadata**



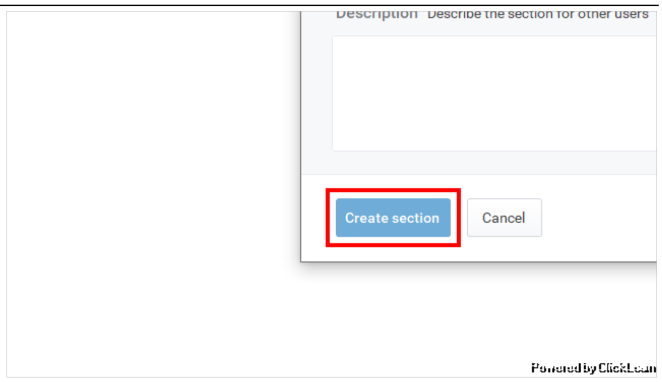
Click on the label **Create new set...**



Enter the name of your custom metadata



Click on the button **Create section**

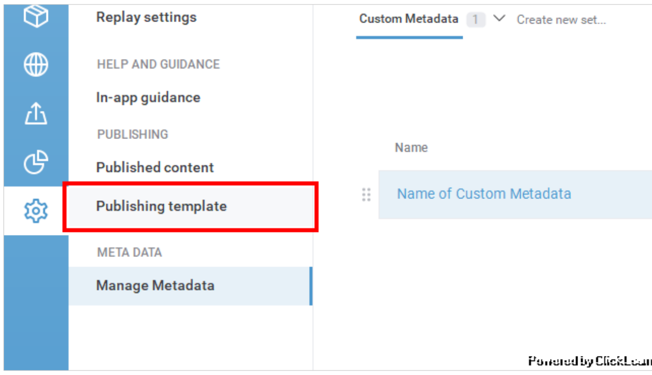


Click on the button **Save changes**

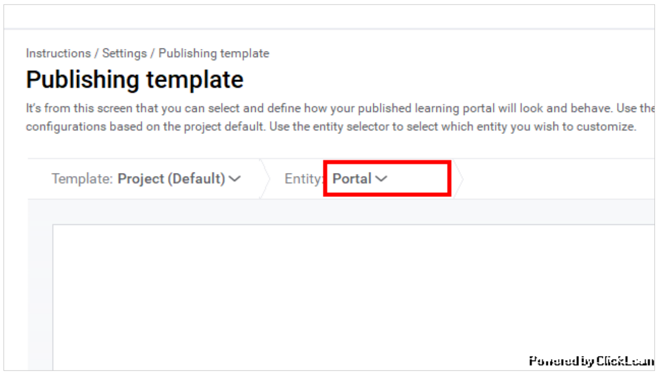
Part 2

You now need to edit the .doc template and insert the placeholder for the custom metadata

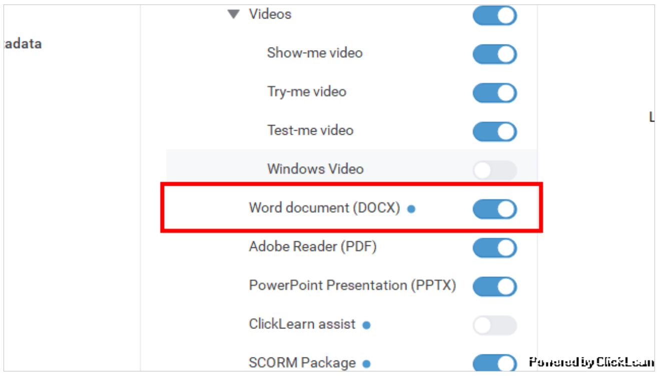
Click on the button **Publishing template**



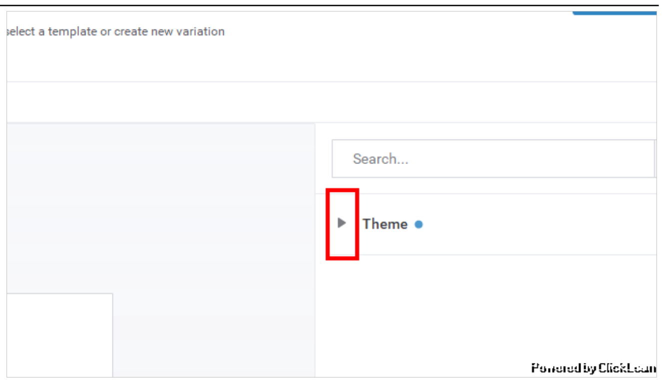
Click on the button **Portal**



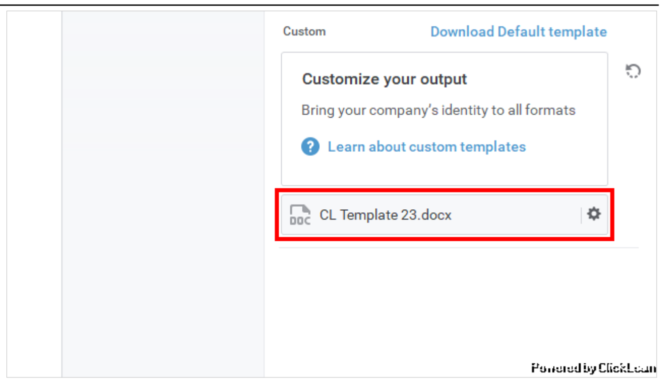
Click on the tree node **Word document (D O C X)**



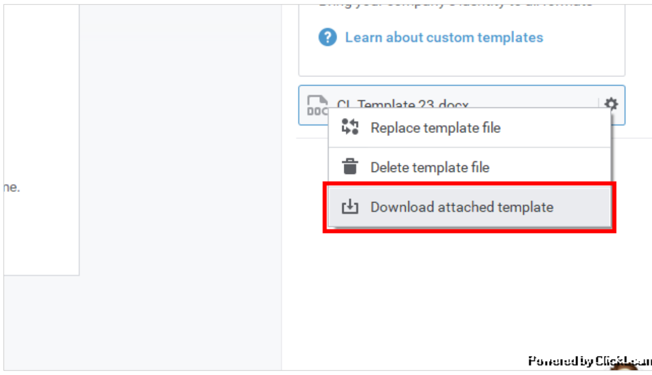
Click on the collapsible panel **Theme** toggle button



Click on your **Word template**



Click on the menu item **Download attached template** and save it to your local drive

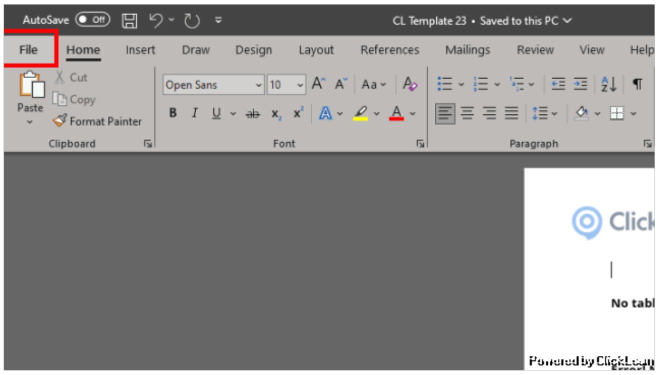


3.2.2. Step 2 - Prepare Word Template

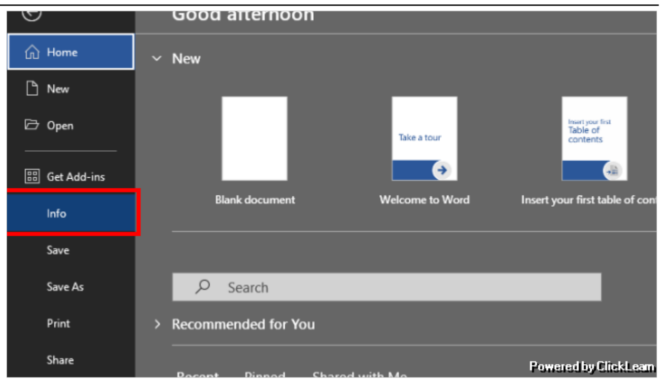
Open the Word template for editing

Part 1

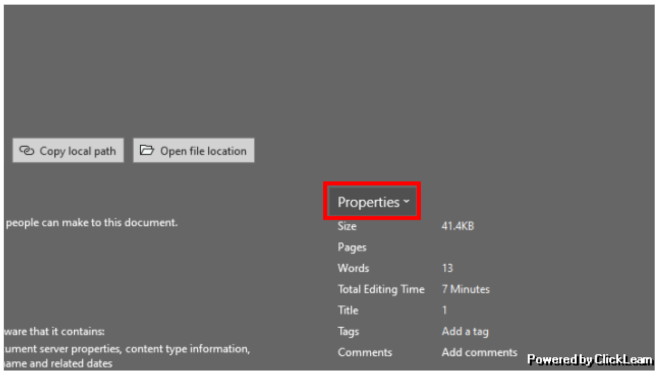
Click on the button **File Tab**.



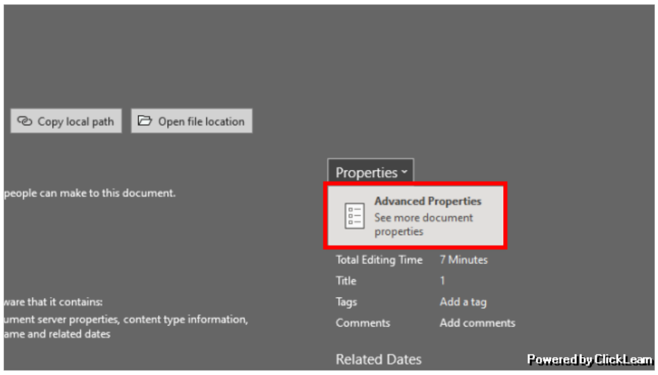
Click on **Info**.



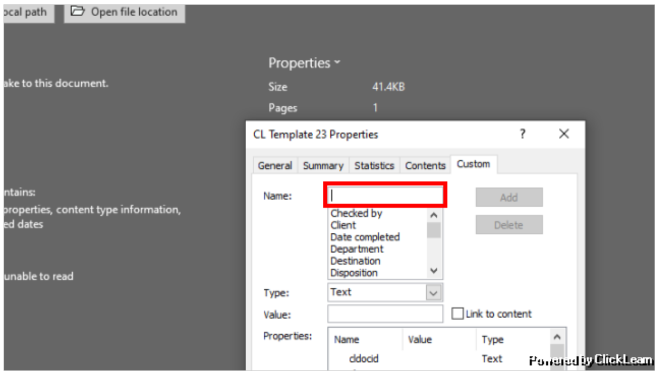
Click on **Properties**.



Click on **Advanced Properties**.

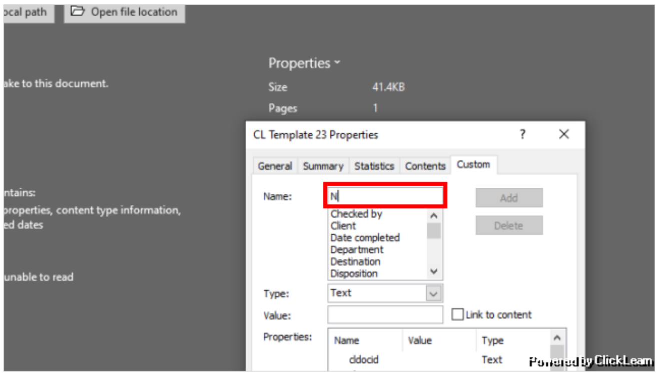


Click on the input field **Name:**.
You may also press **Alt+N**.

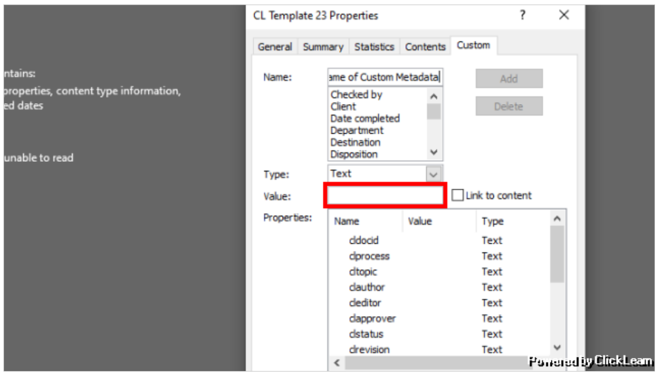


Enter the name of your **Custom Metadata**.

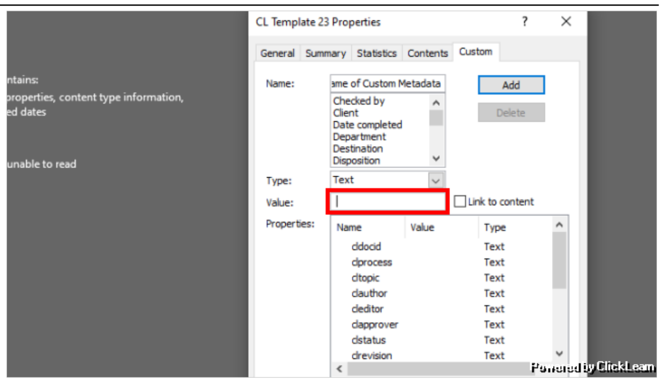
NOTE: It must start with a capital letter



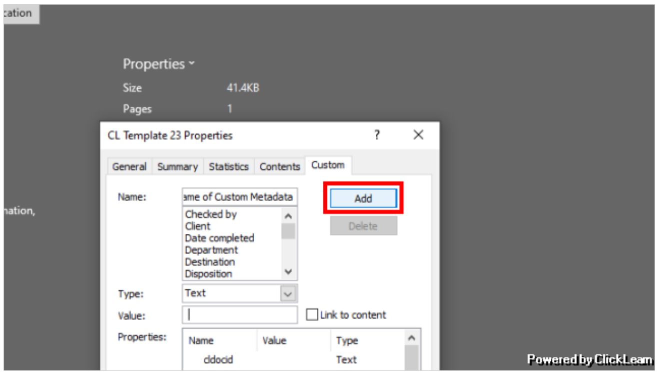
Click on the input field **Value:**.
You may also press **Alt+V**.



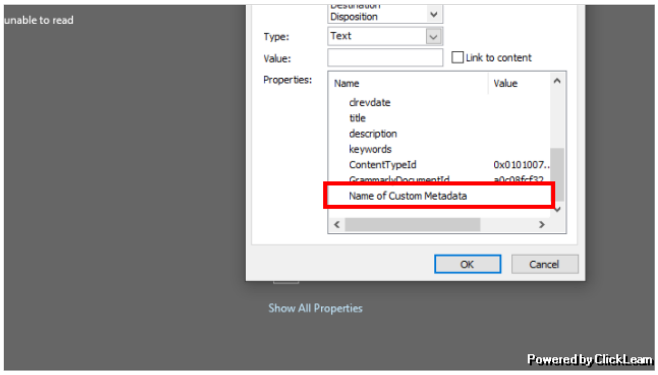
Press the **Space** key.



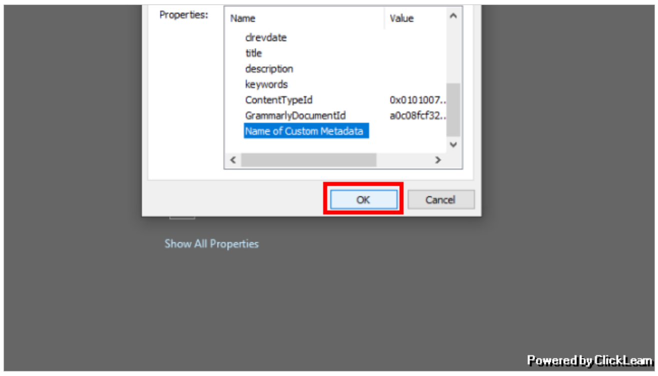
Click on the button **Add**.
You may also press **Alt+A**.



You can now find your **Custom Metadata.** in the list of Properties

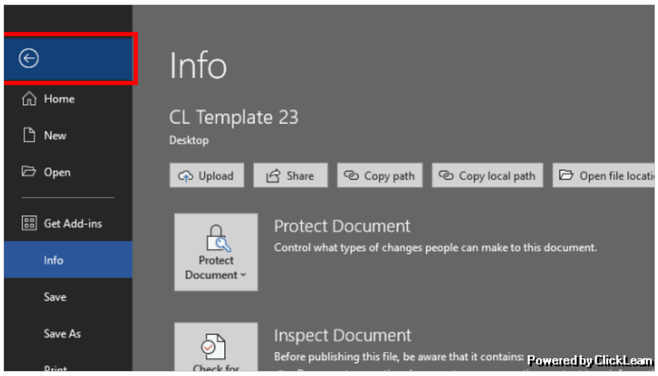


Click on the button **OK**.

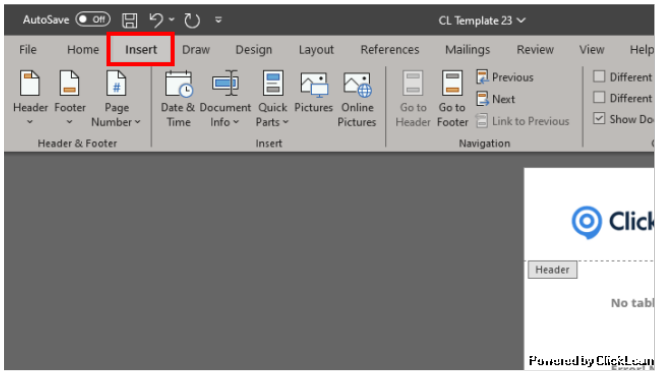


Part 2

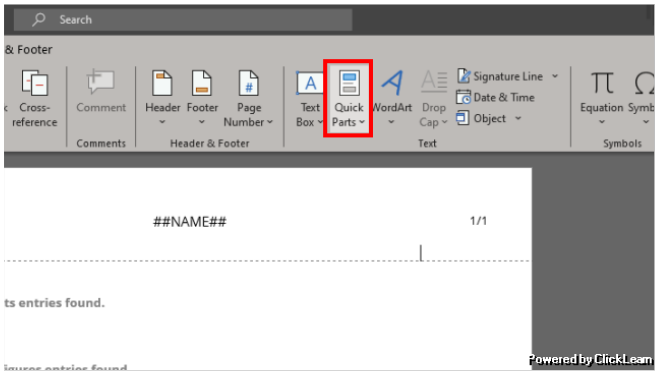
Click **Back**.



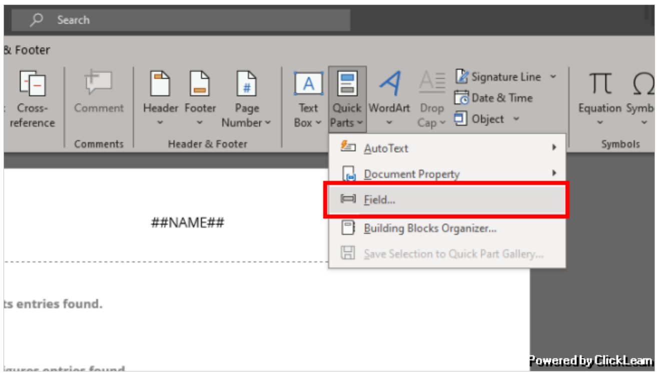
Click on the tab **Insert**.



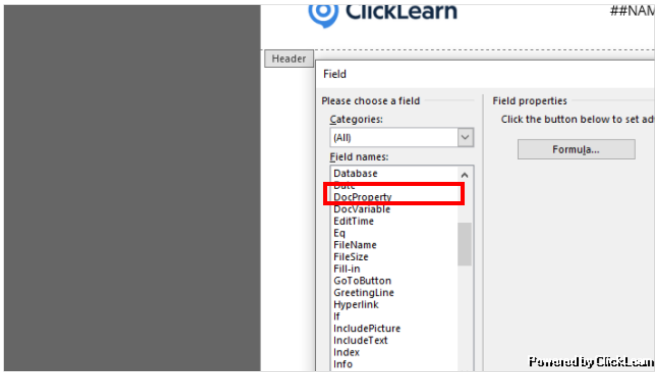
Click on the drop down button **Quick Parts**.



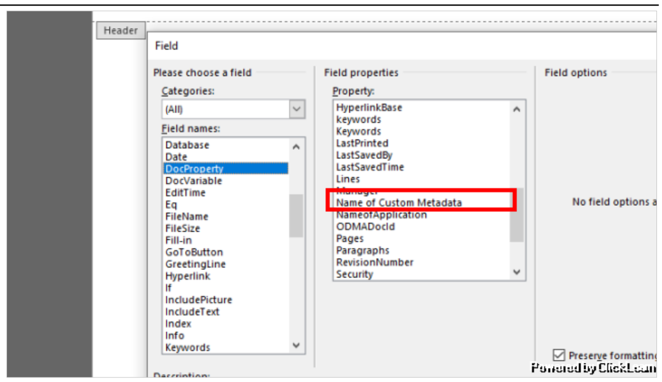
Click on the menu **Field...**.



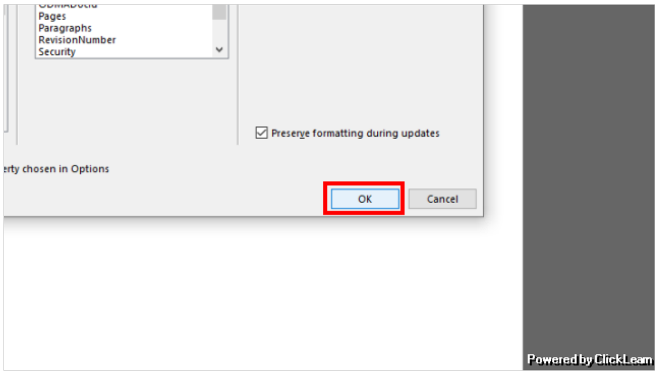
In Field names: scroll down to **DocProperty**.



In Property, locate the name of your **Custom Metadata**.



Click on the button **OK** to insert the metadata's placeholder

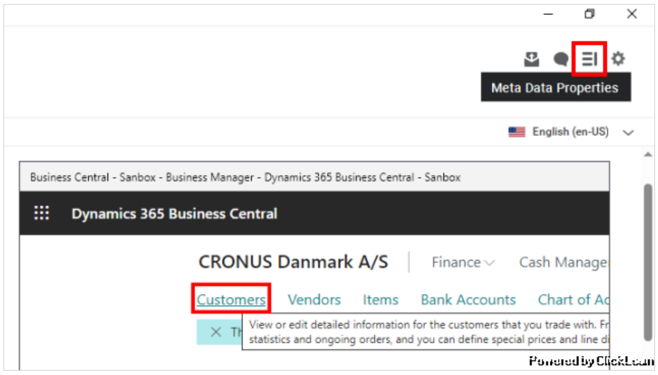


Save and close your template. Go back to ClickLearn Studio and upload it, replacing the current template

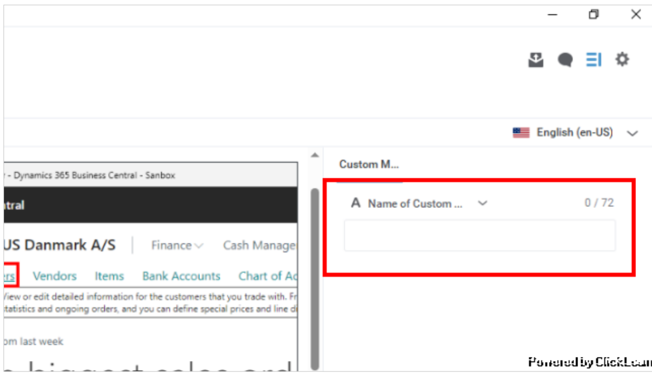
3.2.3. Step 3 - Set Metadata

Open your recording and add the text to your custom metadata

Click on the label **Meta Data Properties**



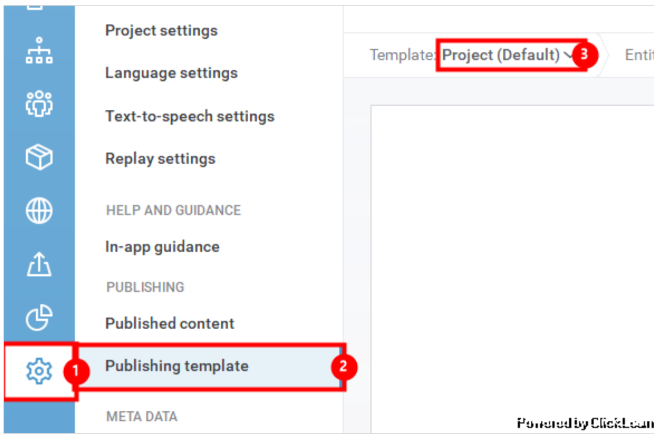
Click on the panel of **Name of Custom Metadata**



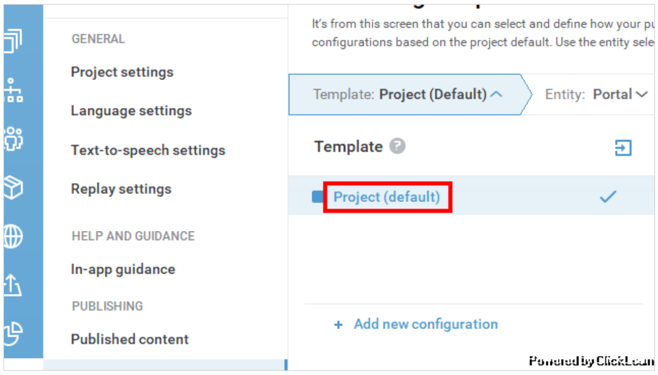
3.3. Template Editor

3.3.1. Setting logo

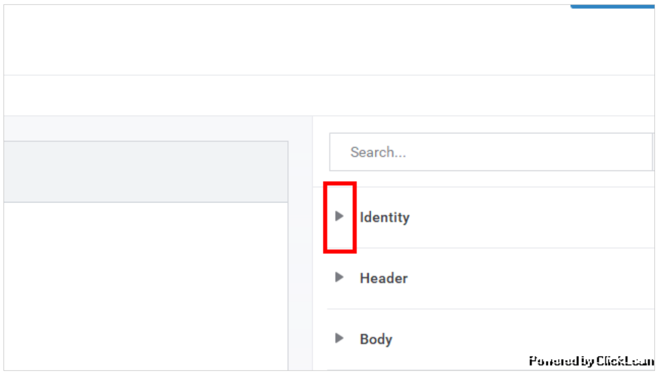
1. Click on the button **Settings**.
2. Click on the button **Publishing template**.
3. Click on the current template.



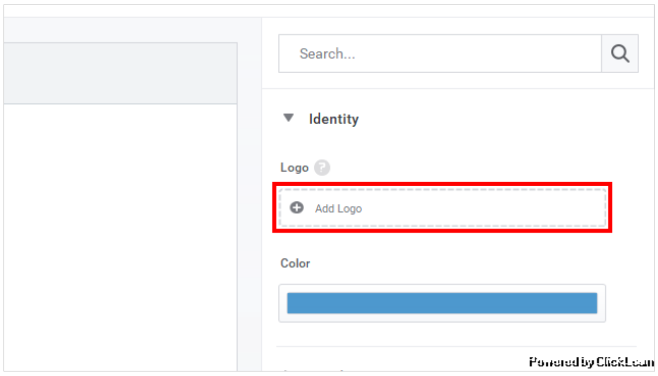
Click on the label **Project (default)**



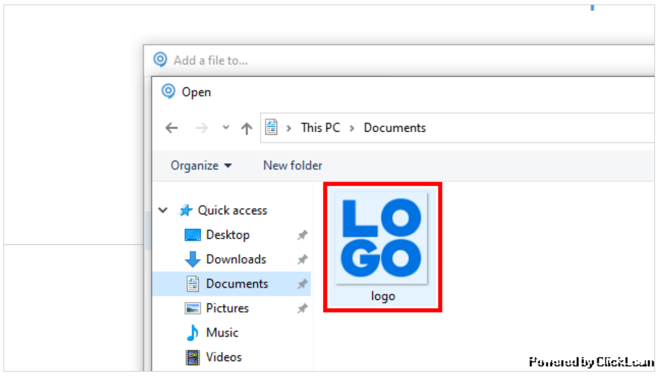
Click on the collapsible panel **Identity** toggle button



Click on the file upload **Add Logo**

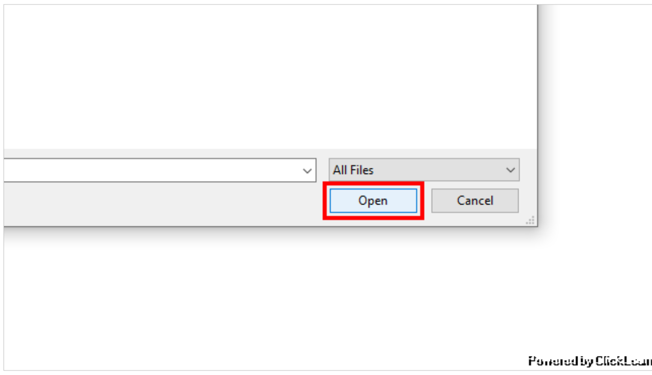


Click on the list element **logo**.

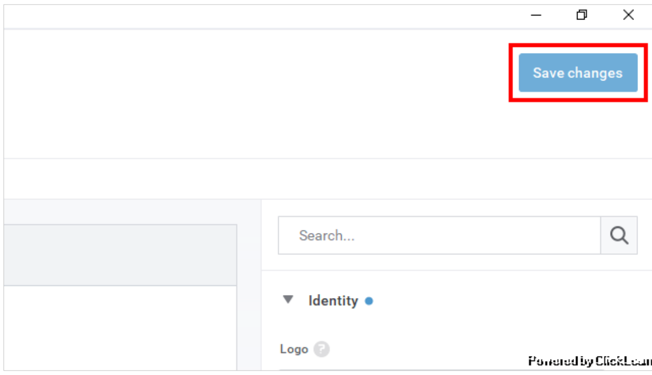


Go to the location of the logo on your pc.
TIP: We recommend using a .png format with transparency.

Click on the button **Open**.
You may also press **Alt+O**.



Click on the button **Save changes**



4. Other

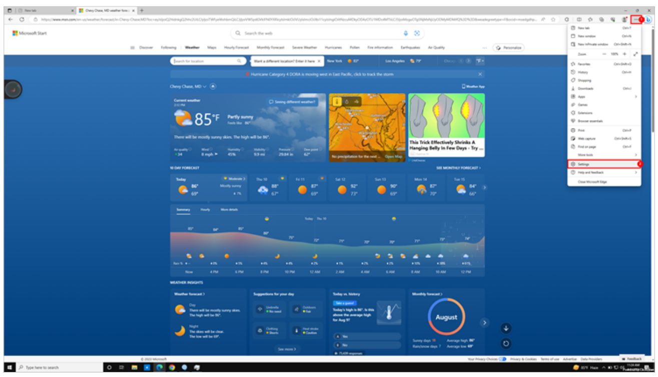
4.1. Installing Extensions and Native Messaging Host

Please read the entire installation guide before starting the process.

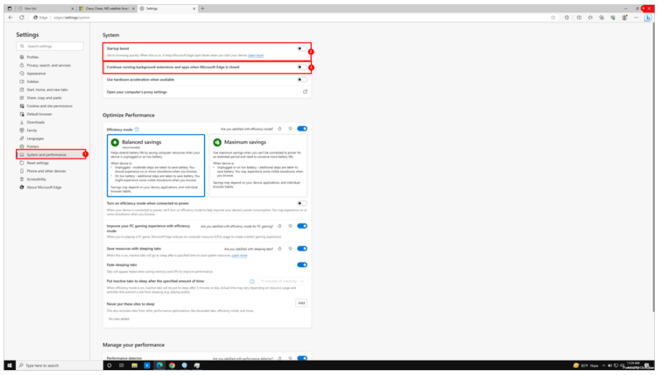
Due to the Native Messaging Host being written to the Current User registry, be aware that internal IT support might be required to complete these steps depending on your organisation's security set up.

4.1.1. Preparing for Installation

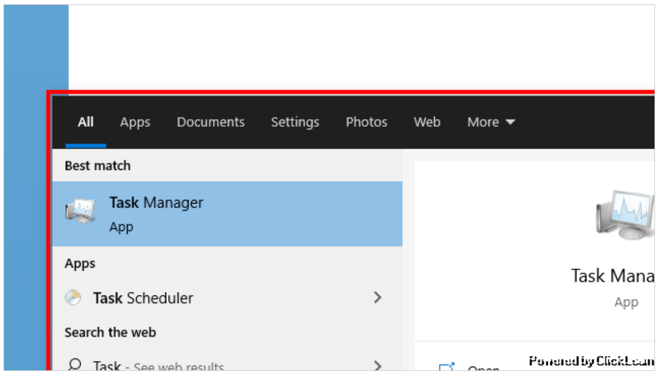
1. Open **Edge** and click the menu.
2. Click **Settings**.



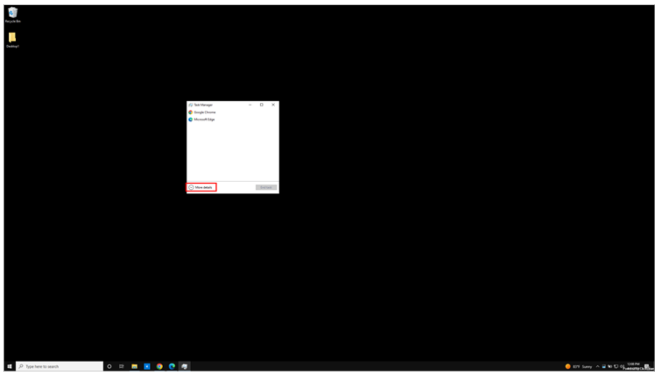
1. Click **System and performance**.
2. Disable **Startup boost**.
3. Disable **Continue running background extensions and apps....**
4. Close **Edge**.



Open **Task Manager.**

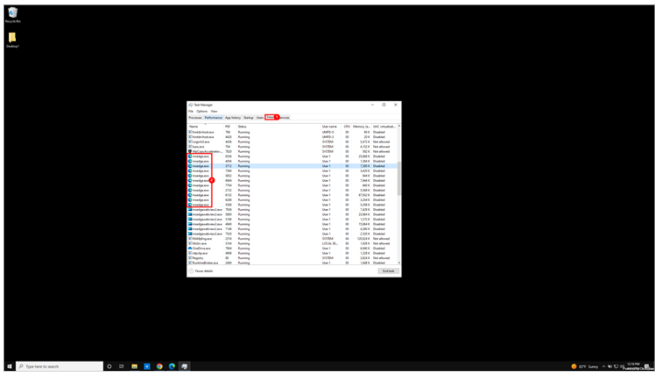


Click **More details**.



1. Click the tab **Details.**
2. Right-click **msedge.exe** and end task until all processes have closed.

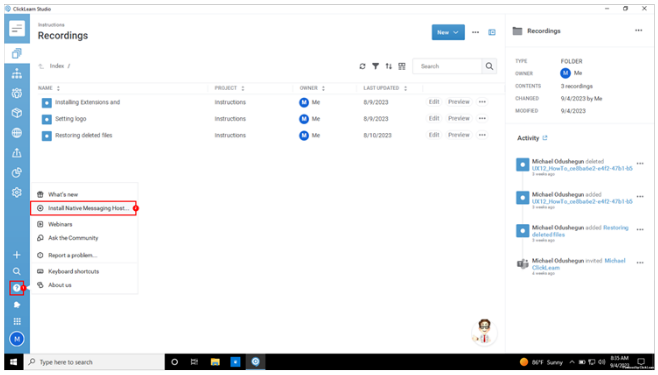
   Locate **chrome.exe** and repeat the same steps.



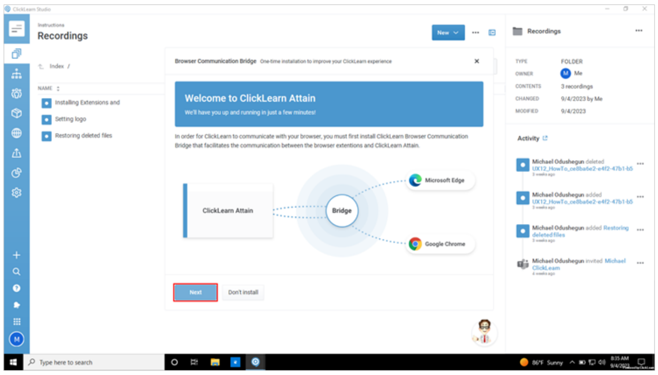
4.1.2. Installation

In ClickLearn Studio

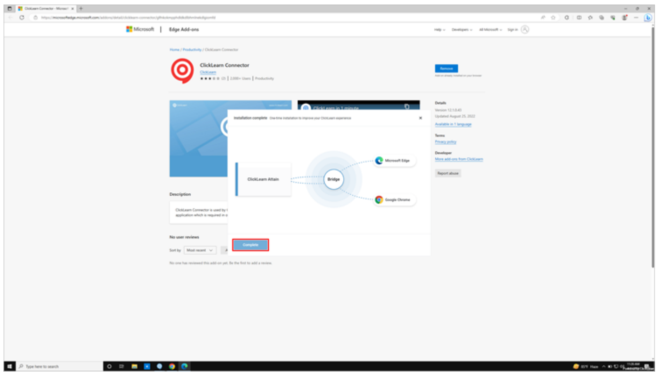
1. Click on the button **Get Help**.
2. Click on the label **Install Native Messaging Host...**



Click on the button **Next**
The next few steps will automatically open your web browsers and take you the the extension page.
Please pay attention to the instructions to make sure that you do not accidentally skip these steps.
Once you have installed the extension in Edge, return to ClickLearn Studio to continue the process to install the extension in Chrome.



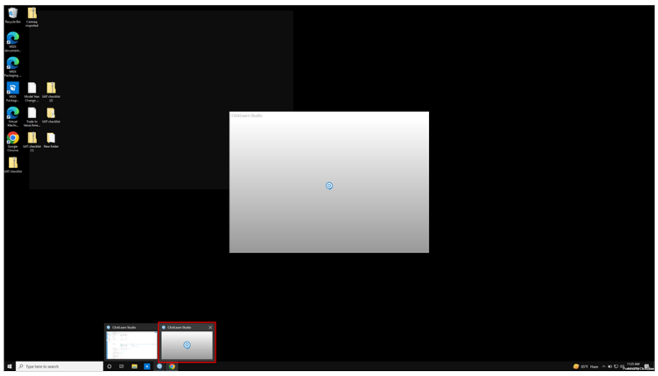
Click on the button **Complete**



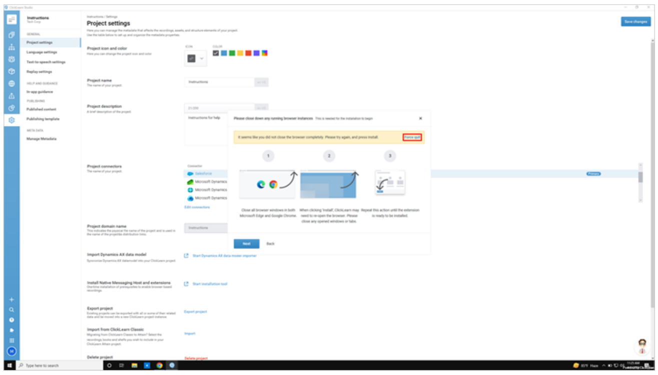
4.1.3. Troubleshooting

NOTE: The installation panel might be hiding behind the main window of ClickLearn Studio.

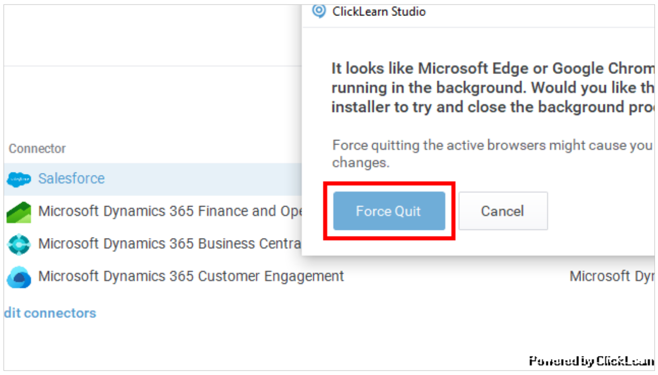
Hover over your Windows Task bar and click on the small grey box for **ClickLearn Studio** when it appears.



If prompted that you are running Edge or CHrome in the background, click on the link **Force quit**



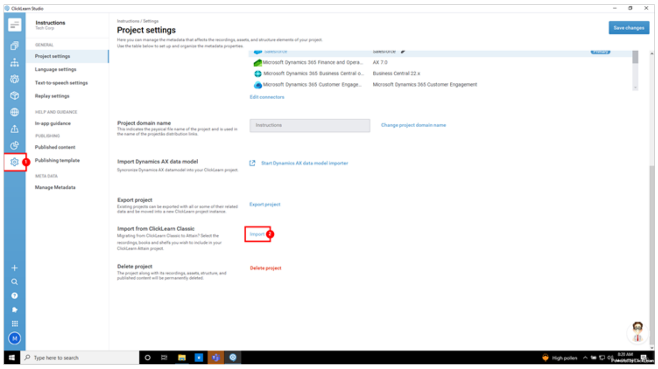
Click on the button **Force Quit**



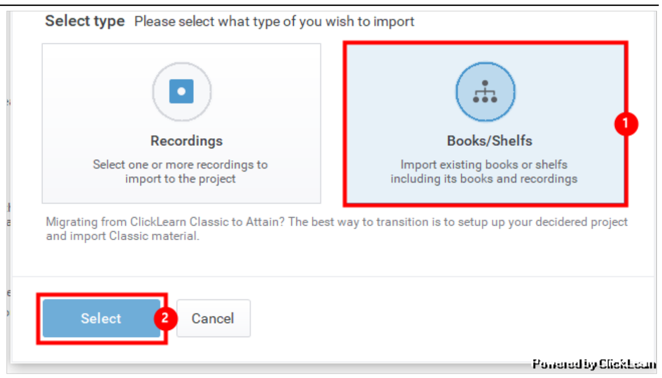
4.2. Importing Books/Shelfs from Classic to Attain

Prior to importing your ClickLearn Classic Book or Shelf, we advise that you know where your .clrx, .clbx and .clsx files are located on your local or network drives.

1. Open the project that you want to import your Classic files into and click on the button **Settings**.
2. Scroll to **Import from ClickLearn Classic** and Click on the button **Import**.

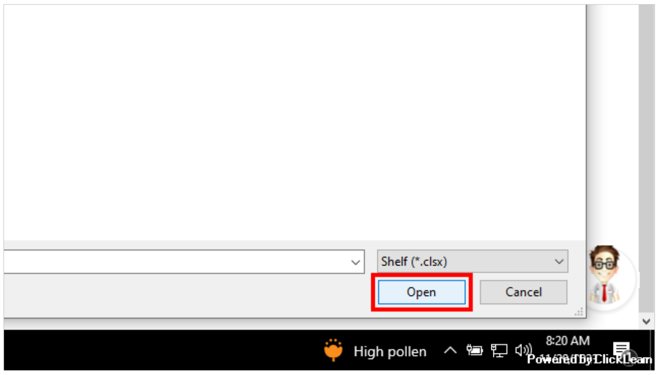


1. Click on the **Books/Shelfs** panel.
2. Click on the button **Select**.

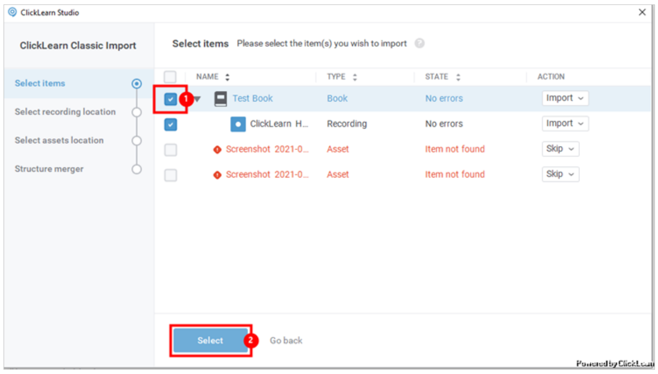


Navigate to the location of your Book or Shelf file and Click on the button **Open**.

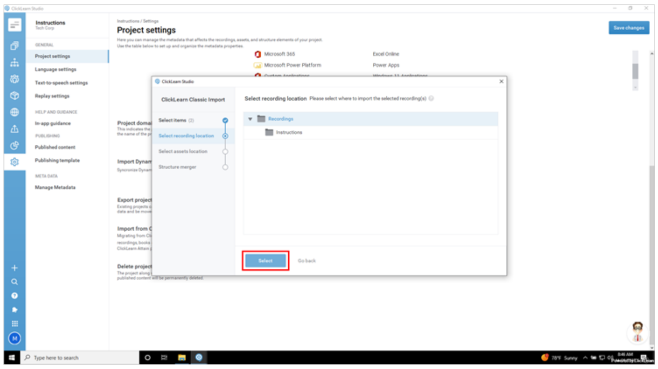
NOTE: Above the Open button you have the option of selecting Book or Shelf. By default, Shelf is selected.



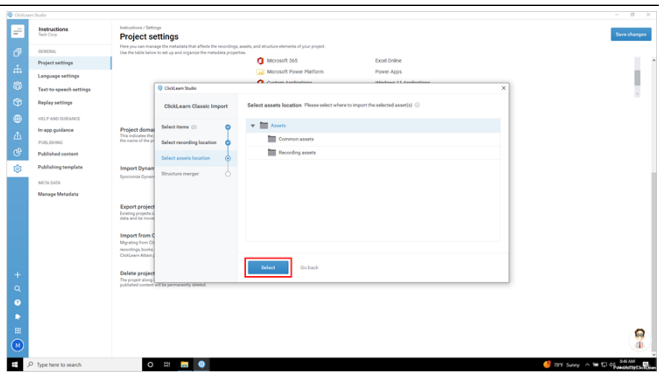
1. Click the **check box** for the Book/Shelf you want to import.
2. Click on the button **Select**.



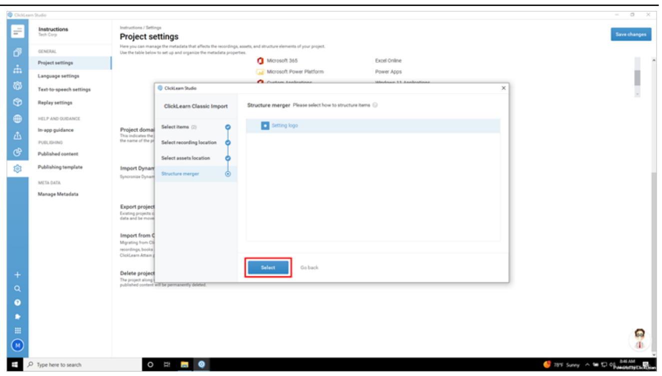
Choose where you want to save your **imported recordings** and click on the button **Select**



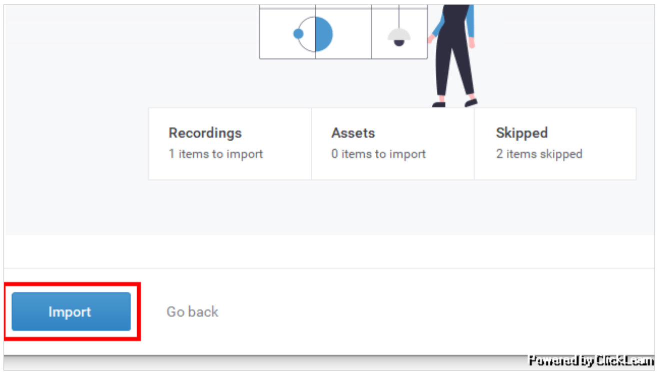
Choose where you want to save your **imported assets** and click on the button **Select**



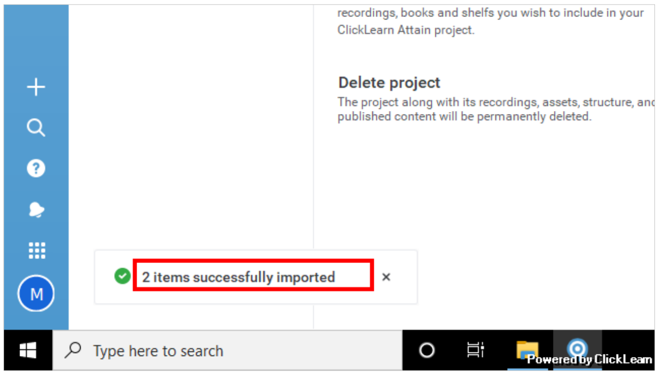
Choose how you want to merge your Classic **structure** with your new structure and click on the button **Select**



Click on the button **Import**



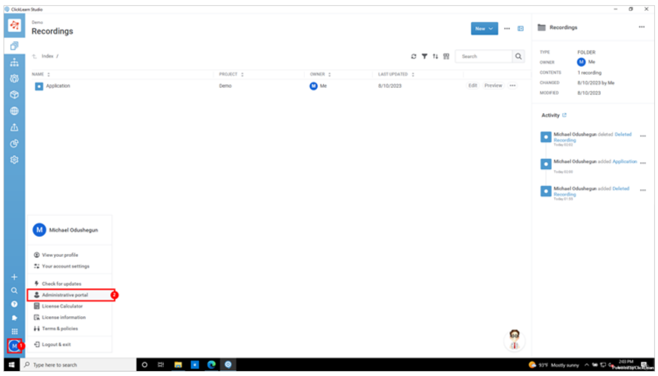
ClickLearn will inform you that your **items successfully imported**



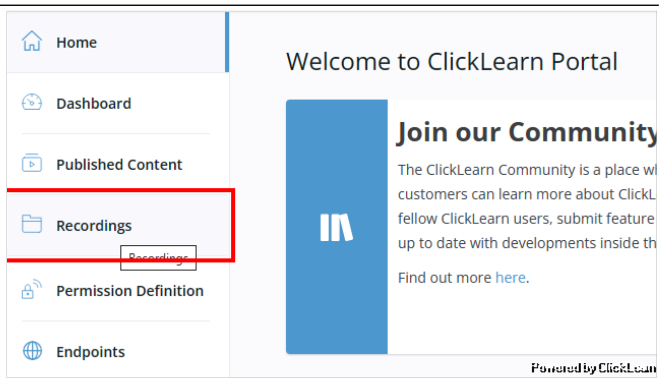
You can now view your ClickLearn Classic project in ClickLearn Attain.

4.3. Restoring deleted files

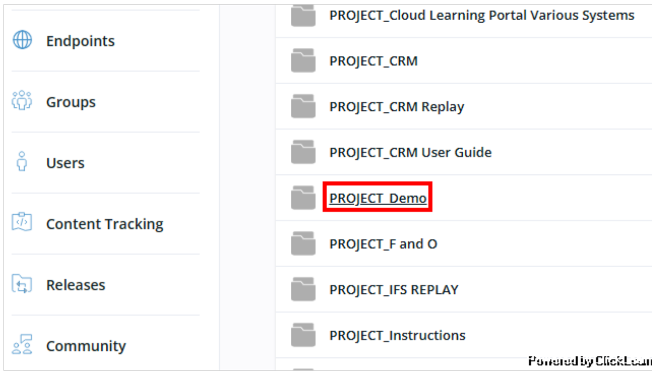
1. Click on the label **Profile**.
2. Click on the label **Administrative portal**.



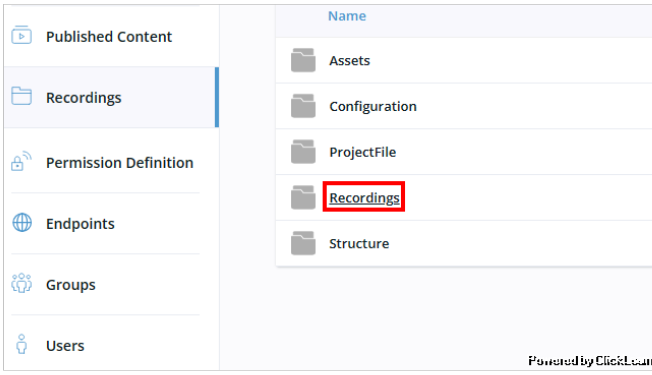
Click on the link **Recordings**



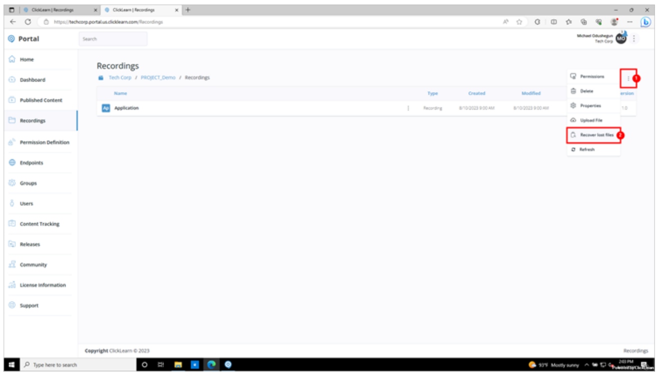
Navigate to the Project folder and open the project with the deleted recording.
Click on the link **PROJECT_project name**



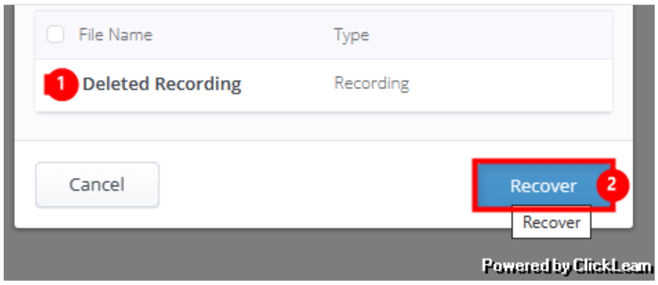
Click on the link **Recordings**



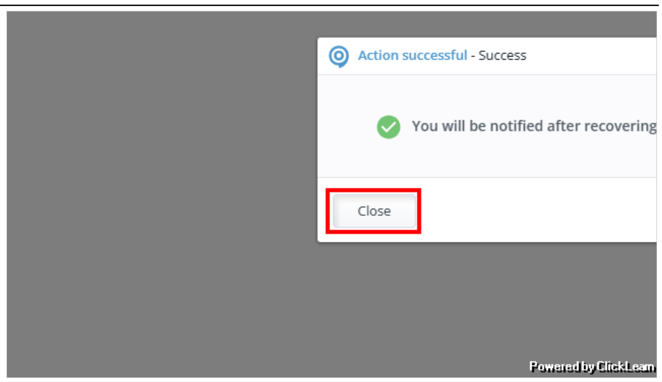
1. Click on the link **open menu**.
2. Click on the link **Recover lost files**.



1. Select the **recording** you want to recover.
2. Click on the link **Recover**.

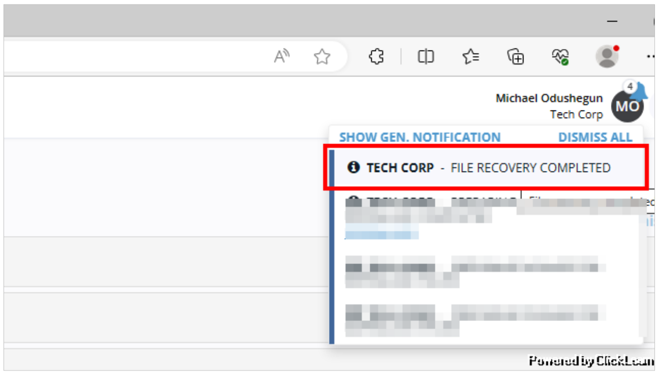


Click on the link **Close**

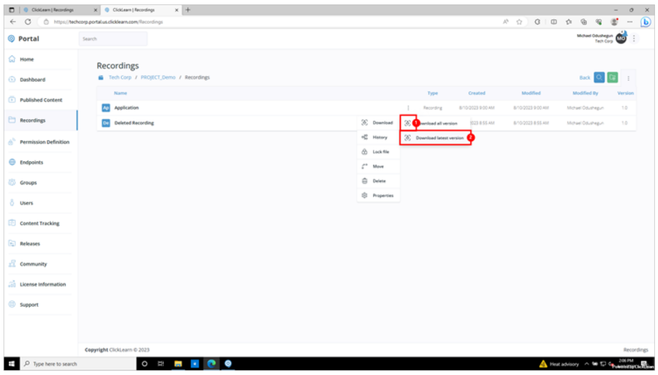


Click on the **blue bell** to see that the file has been recovered.

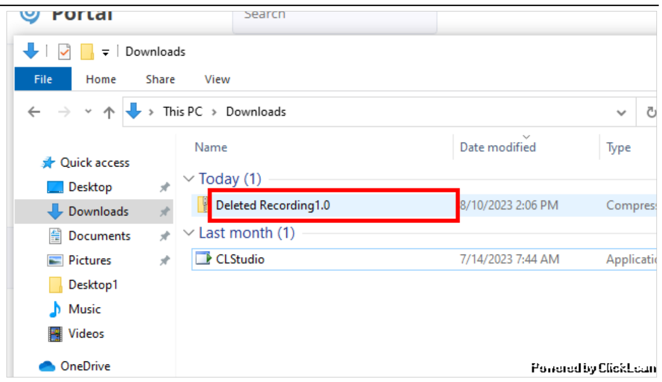
TIP: If it does not display a notification after 1 minute, refresh your window.



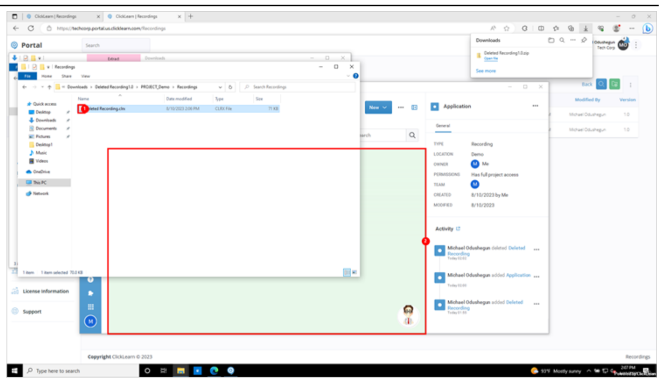
1. Return to the original location to find the recording and click on the link **open menu**.
2. Click on the link **Download latest version**.



In windows, locate the **.zipfile** of the recovered recording and extract it.



1. Select the **.clrx** file and click and hold the left mouse button on the button .
2. Drag and Release the left mouse button on the panel containing recordings.



The recording has been restored.