

Data Sheet



Assima Assist is an intelligent application overlay that uses unique context recognition to push targeted messages, process guidance, checks and alerts to users directly as they work in their live critical business applications.

Assist Runtime

The Assist Runtime is a 32-bit application installed on users' Windows-based computers that allows them to log in and launch Assist for a particular target application.

The Runtime assesses a user's license capabilities to either access or author content within the target application.

 When the user logs in, the Assist toolbar appears at the top of the relevant application.

Through the toolbar, users can search for content or author content, dependent on their Assist license.

Assist is available for these target applications:

- SAP R/3 via SAP GUI 32 bits
- HTML applications running on Internet Explorer 9.0 and above
- HTML applications running on Chrome or Firefox (latest versions), through the use of an Assima extension

What does Assist look like?

Assist delivers *notes* and *guides* in-application and a search feature with which users can find and display content from the Collaborate library, to appear in *content viewers* in-application.

Notes

Assist notes contain information, messages, alerts or direct links to other relevant resources and are pushed to the user directly in the application. Notes typically outline best practices or information about how to process application tasks effectively.

There are two types of notes: *sticky* and *floating*.

Sticky notes

Positioned on screen objects, such as fields, buttons or links, sticky notes provide information relevant to the object they are

attached to, e.g. what clicking on a particular button will do or information on data selections for a particular field.

Floating notes

Floating notes are associated with a screen and are therefore not attached to any particular object. They display open when users get to a given screen.

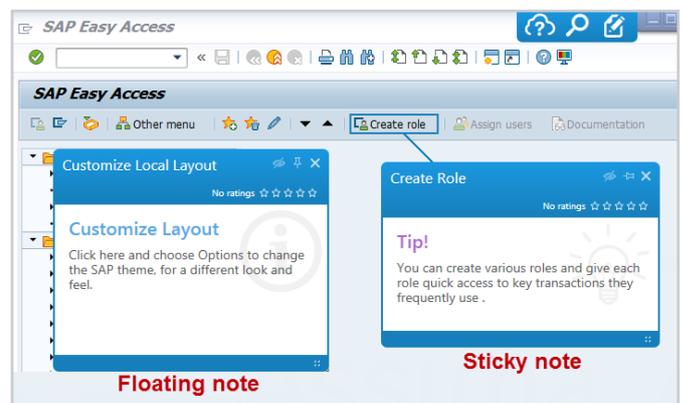


Fig.1 – Sticky and floating notes

Guides

Guides provide step-by-step assistance on following the best practice route for completing a task or workflow, right in the target application.

The guidance is contextual, recognizing where the user is and synchronizing with their location in the application process.

Fields and actions that should be completed are identified and the next best step to take is pointed out.

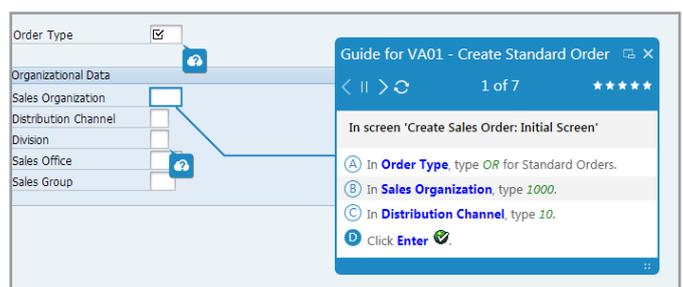


Fig.2 – Guide

Content Viewers

Notes and guides are screen-dependent. It is also possible to provide content that end users can search for and consume directly from any screen in their application. These can be for example, documents, lessons, courses and videos which display in dedicated content viewers.

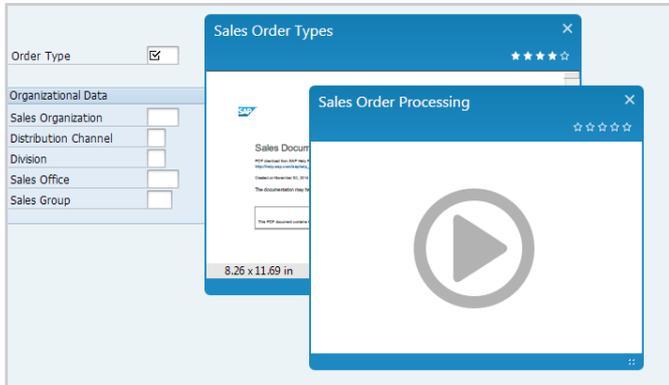


Fig.3 – Content viewers

Finding Content

Assist offers two search options: In-application search and Enterprise search.

In-application search

From their application, end users can search for available resources by performing a search in the Assist Bar.

By default, this search is *context-sensitive*, meaning it displays results relating to the current screen users are on. They can however easily broaden the search and look for any items made available to them in the whole Collaborate Library.

Enterprise Search

The Enterprise Search allows users who are logged in to Assist to search and find content from anywhere on their computer, i.e. not just a specific target application.

By default, the Enterprise Search looks for content made available to users in the entire Collaborate Library.

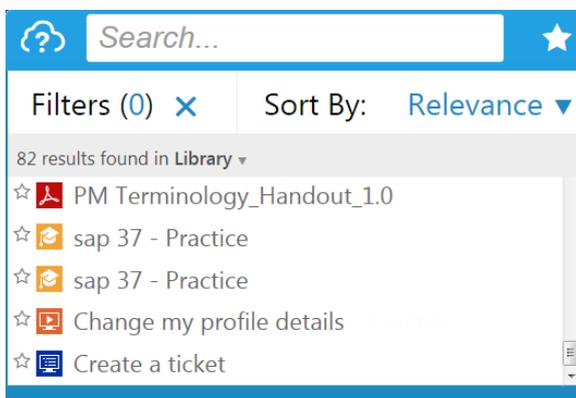


Fig.4 – Enterprise Search bar

Search results

In both search types, the results are ordered 'By Relevance' meaning the best matching result is shown at the top of the list, although the sort order can be changed.

Users can also apply filters to narrow down the results, add items to their favorites for quick access, and quickly identify what's new.

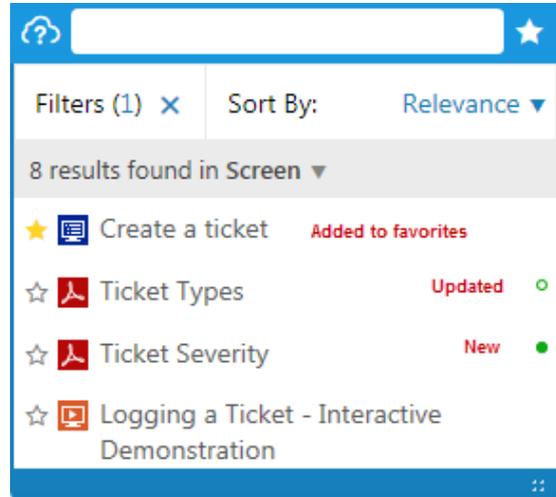


Fig.5 – In-application search

Content Creation

In-App Content Creation

Assist Authors first need to create a project in the Collaborate Workspace and tie it in with the target application.

Once authors log into Assist, they see an extra icon in their Assist Bar, allowing them to launch the Assist Studio, where they can author Assist content.

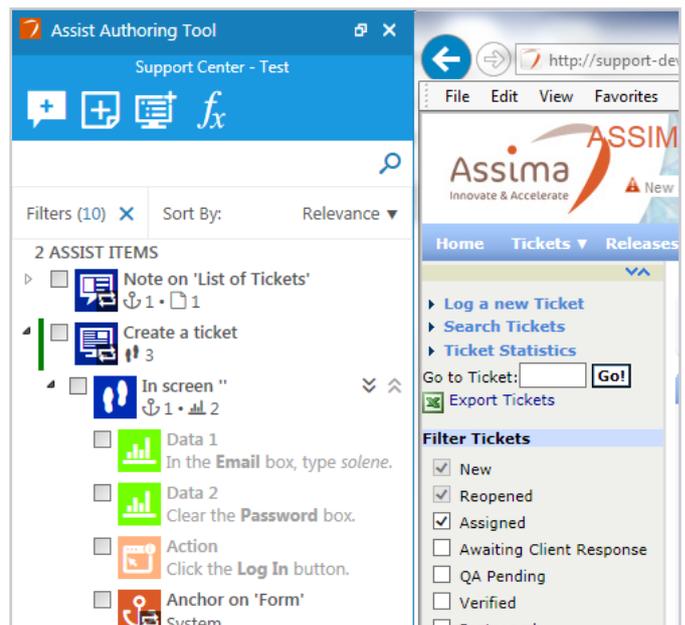


Fig.6 – Assist Studio on Assima Support Center application

Notes and guides are always created directly in the target application but will also be visible in the backend Workspace project.

Creating notes

In author mode, a note is effectively a container into which content must be added such as documents, videos, lessons, courses, and web pages.

This content may already exist in the author's Workspace or on their computer; it can be web pages created on the fly or pages that link to external websites.

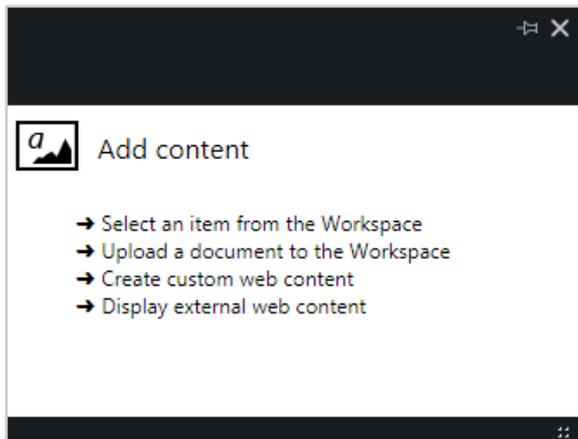


Fig.7 – Empty note

Creating guides

A guide is made by actually performing the task steps (data entries and actions) in the target application.

Instruction text is generated automatically during the capture, though it can be modified, and data input can be anonymized if required.

Create/Import Content on the Platform

Although notes must be created in-application, the content items that go into them can be created/imported/edited either in-app or from the backend project where they are stored.

Web content is the most frequent content type conveyed into notes as it allows authors to push all kinds of information to end users, such as messages, alerts, warnings and process changes.

Authors can use *web content models* from their Workspace, which are readily designed templates, for each kind of information to convey.

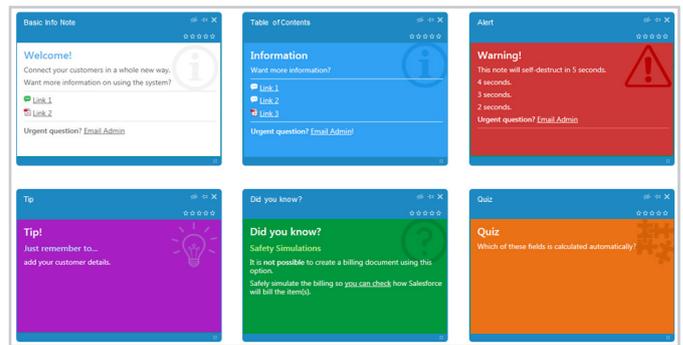


Fig.8 – Web content models

Content Enhancement

Guides are always created and edited in-application. Authors can modify the instruction text; insert images, hyperlinks to external websites or Library content; add/remove/re-order actions and data input.

Notes can be edited either in-application or from the Workspace, and authors can control when, where and how they appear to end users.

Note Properties.

Note visibility

Authors have control over the visibility and behavior of the notes on end users' screens.

- **On request:** these notes are hidden by default, but end users can display them when needed
- **Shown once,** then on request: these notes show once, then will hide automatically but end users can re-display them when needed
- **Always shown:** these notes are always visible and will never hide automatically, although end users can hide them manually

The Assist toolbar indicates how many notes are hidden on each screen. Users simply need to click on the number to reveal them.



Note size and position

Authors can resize notes according to the length of their content and modify their position on the screen. For sticky notes, they can also decide when the closed note will show in the relation to the object they are attached to.

Minimized/Maximized sticky notes

Authors can decide whether a sticky note will by default be minimized (where users will need to click on it to view its content) or maximized, (where the note appears already open on the user's screen).

Modal floating notes

Floating notes can be set as 'modal' which puts focus on the note and grays out the background screen, preventing users from interacting with the application until the note is acknowledged and closed.

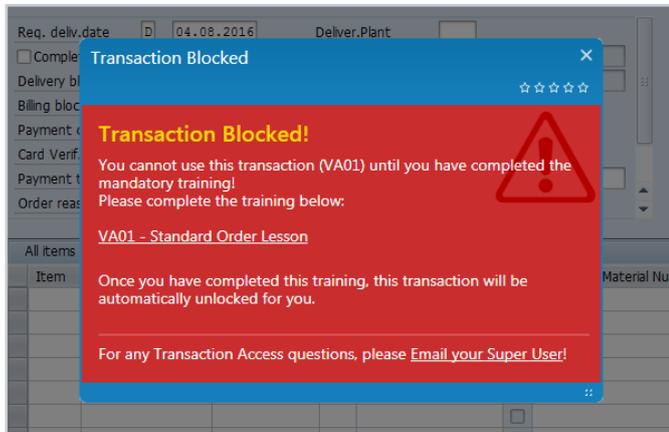


Fig.9 – Modal floating note

Note Content

Generic updates

Authors can easily modify the content displayed in notes, swap content items and also add more than one content item in the same note, which will create multiple pages in the note.

Table of contents

A good practice is to use notes that act as a table of contents with direct links to guides, documents, websites or other applications.

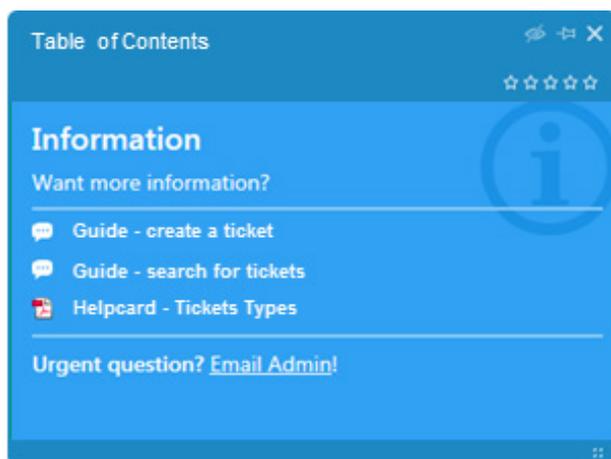


Fig.10 – Table of Contents note

Criteria on Note Content

Criteria can be used to determine whether content is shown to end users or not. For example, content can be shown only if the date is in a particular range, if the users have viewed a pre-requisite document, or if they have passed a specific course.

Criteria can be set on content items contained within notes: if criteria are met, the note will display to the end users; if not, the note will not display.

Collaborate comes with a list of *pre-built* criteria that are easy to use and combine.

External criteria can also be created, which allow more elaborate processing and responses. These require more technical coding skills to implement.

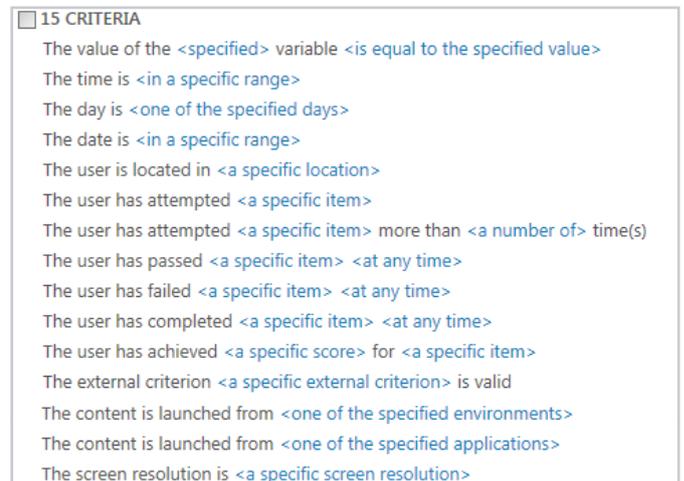


Fig.11 – List of criteria

Advanced Assist Content

Variables

Variables are used to create a more personalized and intelligent Assist layer that knows how to interact with end users, according to the data and choices they've made.

A variable is a data collector created in-application to collect values entered by users or displayed in fields, in the target application.

The collected data can then be re-used in criteria to determine whether the content should show or not. It can also be inserted into the note content or even be passed to external systems, processed, and referenced back into Assist via formulae or JavaScript.

Variables require the *Extended Assist Author* license. There are three types of variables: local, global and built-in.

Local variables

Local variables are created at note level and collect data located on the screen where the note was created. These are only visible to the authors who have permissions to see the note.

Global variables

Global variables can collect data from a different screen to where an Assist note is created and even from a different application. They are visible and available from the Assist toolbar to all authors.

Built-in variables

Assist comes with ready-made variables on commonly used fields to save authors from having to create them. Built-in variables are global by default.

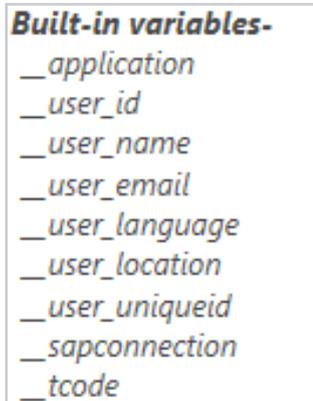


Fig.12 – Built-in variables

Formulae

Assist also provides built-in formulae that process variable data and pass it back into note web content.

NAME	DESCRIPTION
Google Maps	Add a google map
Currency	Convert one currency to another
User information	Display user information
Application information	Display application information
Variable	Display the value of a variable

Fig.13 – Formulae

Target Recognition

One of Assist's unique selling points is its ability to target a variety of applications including SAP R/3, Siebel and web applications on a range of browsers.

The essence of the Assist technology is to recognize the *context* of the application users are in and to provide relevant content for this context.

In some cases, particularly in complex web applications, Assist will need a little human intervention to pinpoint the context more precisely. This is where anchors and signatures come in.

Anchors

When notes and guides are created, Assist automatically creates anchors that tie notes / guide steps to the application screen where they were created. Anchors are necessary so that Assist *knows* where to show the note or synchronize a guide.

In some instances, an application may have *similar* screens causing notes to appear / guides to synchronize on these screens too. If this is unwanted, authors can tie the notes / guide step further down to a unique screen object by adding custom anchors.

Signatures

To pinpoint the right context, Assist needs a unique way to identify a screen or a screen object. This unique thumbprint is called a signature and is made of various elements.

In some screens, it may occur that two or more objects have the same signature and it is therefore impossible for Assist to recognize a unique stable target to attach a note. This occurs mostly when targeting edit fields.

The way around this is to use the signature of the field label (which is far more likely to be unique and stable) as a *proxy* signature and to target the note on the edit field where it should display.

The same principle applies to data in guides, anchors and variables.

Analysis Tool

Authors with technical knowledge can edit components of an Assist object's signature from the *signature* tab in the Assist Studio. If their modifications 'break' the signature, the content will no longer display on screen. The *analysis* tab is there to help them identify the cause of the issue by providing detailed reasons why the item does not match the screen.

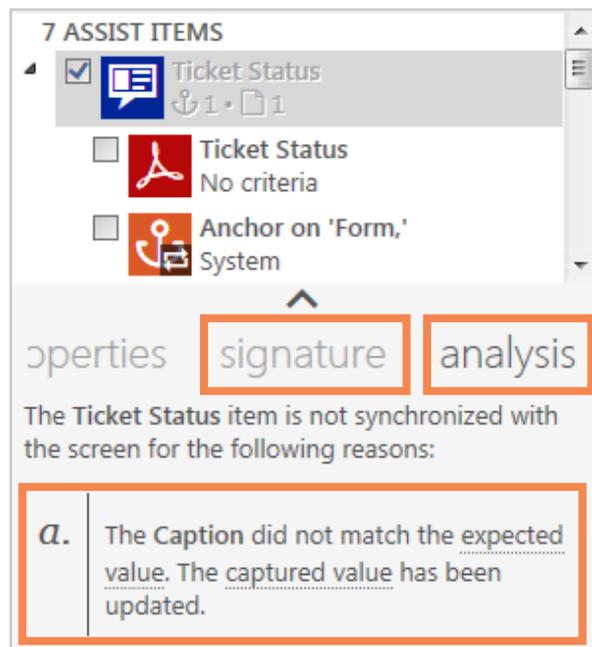


Fig.14 – Analysis tool

Deployment

Publish content

Authors must publish Assist content for it to be visible to end users. This can be done in-application via the Assist Studio or from the Workspace.

Content access is controlled via permissions, to enable targeting specific users or user groups.

Content labels

Content items are labelled onscreen, so users can quickly see what content has already been accessed, what's been updated and what new content is available to them.

Reporting

Collaborate users with the *Analyst* license and relevant permissions can access a suite of reports to track end user interactions with Assist and view their feedback.

These reports can be anonymized to mask end users' identities if required.

End user interaction with Assist

As users interact with notes and guides, their actions are tracked as SCORM information and reflected in the Collaborate Reports module.

Three main types of data are tracked for notes and guides: the user accessing the item, the associated target application and the date/time of various events.

For notes, these tracked events include the note displaying in minimized/maximized view; a change in view; and the note closing. If there are multiple content items in a note, the action of selecting an item is tracked.

For guides, these tracked events include the guide opening/closing; and user actions inside the guide, such as selecting a screen or step view; and clicking on actions or navigation controls, amongst other things.

Content rating and user feedback

End users can rate and provide feedback on any content item accessed in-application, in the Library or via the Enterprise Search. This is visible in the content rating report.

These star rankings are also listed beside the item name, so users can quickly ascertain what content has been rated as useful by their peers.

Translation

Assist allows the automatic translation of guides using built-in platform dictionaries.

Regarding content in notes, Assima Train courses and lessons can also be automatically translated via dictionaries. All other content types, typically created manually, require a manual translation.

Where there are many different language versions of an Assist item, Assist will display it in the language that best matches the user's preferred language(s) in the order set in their profile.

Assist Customization

Users with an *Administrator* license can modify Assist settings for their organization including Assist appearance and other options.

Appearance

Assist templates

Through Assist templates, Administrators can define the colors of Assist elements for their organization.

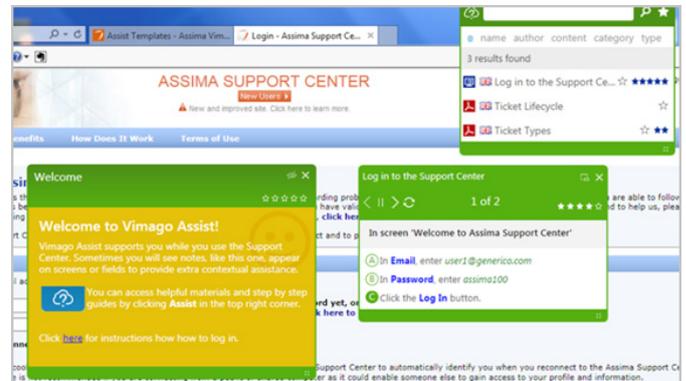


Fig.15 – Green Assist template applied

Note types

Administrators can also define note types to further customize the colors and icons of minimized sticky notes, depending on the type of information they convey. For example, warnings, process changes, basic information.

Once set, these note types are available to authors who can apply them in-application or from the Workspace.

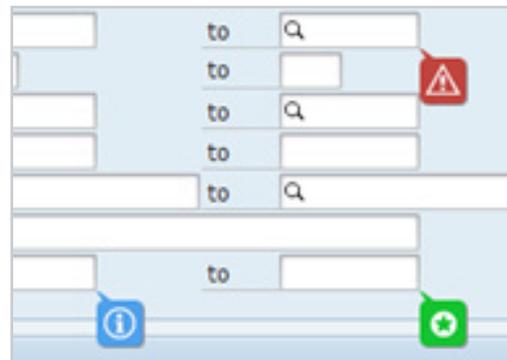


Fig.16 – Note types applied

Custom links

Administrators can create custom links which are shortcuts to external websites, to be available on the Assist toolbar for end users.

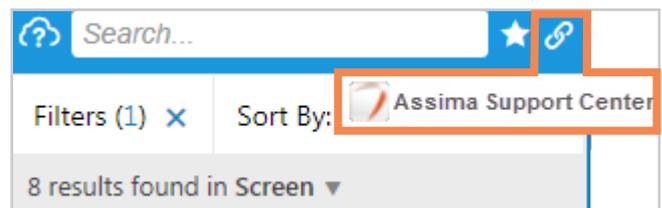


Fig.17 – Custom link to the Assima Support Center

Assist toolbar position

The Assist toolbar is located at the top right of the screen by default, but Administrators can change its position for each application in case it blocks key screen elements.

Other Settings

Client-side screen analysis

To remove some processing load on the server and ensure no sensitive data leaves the client computer, it is possible to activate the *Client-side screen analysis* feature from the Application settings. This feature uses a local version of the rule engine to

perform the screen analysis on the client computer, which avoids sending the screen description to the server. It also evaluates the in-app variables locally, so they are not transmitted to the server. It does not provide complete confidentiality of data scanned in target application when notes make use of external criteria and when end-users are performing contextual search (pull information).

Other options

Administrators can modify other settings such as controlling the default content item size, enabling/disabling the Enterprise Search, and other Assist Runtime options.



Assima: digital solutions that empower your employees to do more, faster, and smarter, on their critical information systems. With direct operations in 11 countries across Europe, North America and Africa complemented by strategic global partnerships, we succeed, when you succeed.

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