

ANCILE
uPerform™



User Manual

Creating Content with ANCILE uPerform™ Rapid Recorder

Version 5

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Contents

<i>Using the ANCILE uPerform Rapid Recorder</i>	<i>3</i>
Introduction to ANCILE uPerform Rapid Recorder	4
Getting Started with ANCILE uPerform Rapid Recorder	5
Using the Task List	8
Using the Task List Toolbar.....	9
Recording with ANCILE uPerform Rapid Recorder	12
Displaying the Recorder Preview Pane.....	12
Capturing Controls	13
Using Undo and Redo	15
Minimizing the Recorder Window.....	16
Using Audio with ANCILE uPerform Rapid Recorder	17
Using Notes	18
Pausing and Stopping the Recorder	19
Using Image Mode	20
Turning On Help Mode	21
Exiting	22
Uninstalling.....	23
<i>Glossary of Terms.....</i>	<i>25</i>
<i>Index</i>	<i>27</i>

Using the ANCILE uPerform Rapid Recorder

ANCILE uPerform™ Rapid Recorder is a stand-alone, streamlined recorder. ANCILE uPerform Rapid Recorder allows users with no previous uPerform training or experience to record and check in content. Rapid Recorder can be opened directly from the Start menu or from a task notification email.

Introduction to ANCILE uPerform Rapid Recorder

ANCILE uPerform Rapid Recorder can be used to record your actions in Microsoft Windows, web-based, and enterprise applications. Rapid Recorder provides the same functionality as the recorder in the ANCILE uPerform application, but is designed specifically for subject matter experts and other users with limited or no training with ANCILE uPerform.

Getting Started with ANCILE uPerform Rapid Recorder

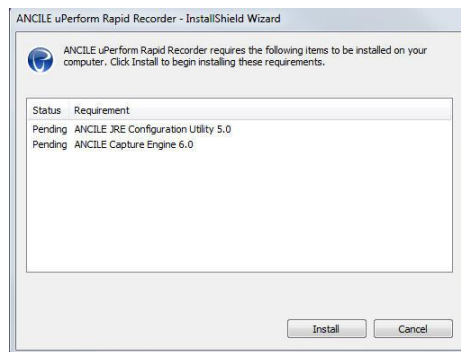
Downloading ANCILE uPerform Rapid Recorder

1. Navigate to **[Install Location]\Downloads**.

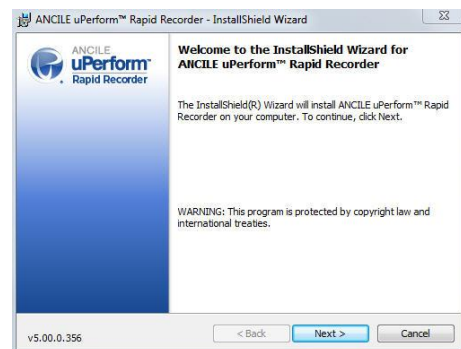


ANCILE uPerform Rapid Recorder also can be installed from the link in the email task notification. For more information, refer to Opening Tasks from the Email Notification (on page 9).

2. Double-click the ANCILE uPerform Rapid Recorder installation package (For example: ANCILE_Rapid_Recorder_Setup.exe).
3. If prompted to install any required items, such as ANCILE Capture Engine, click **Install**.



4. Click **Next** in the *Welcome* window to start the installation.



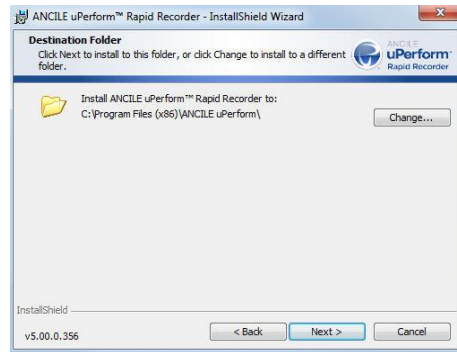
5. After reading the License Agreement, select the **I Accept the terms in the license agreement** radio button. Optionally, you may print the license agreement for reference.

6. Click **Next**.

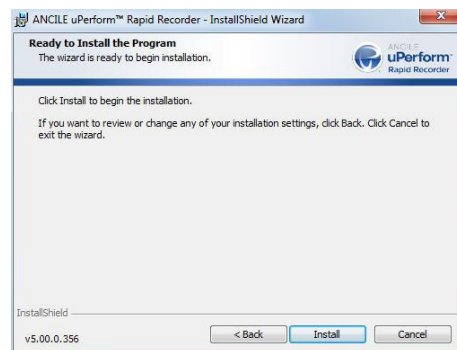


7. Review the default destination folder where Rapid Recorder will be installed. Click **Change** to select a different folder.

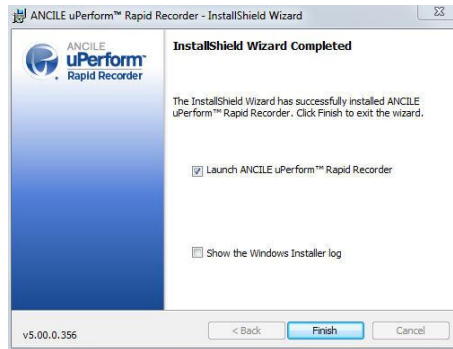
8. Click **Next** once you have selected a folder.



9. Click **Install** when you are finished selecting all installation settings.



10. Click **Finish**.

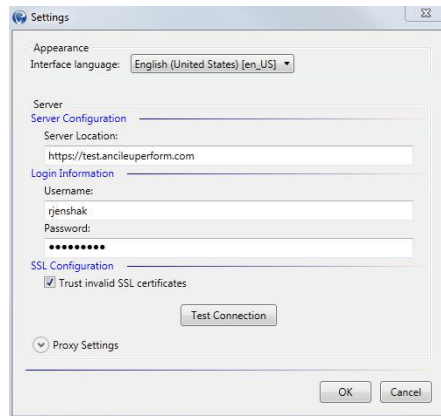


Specifying ANCILE uPerform Rapid Recorder Settings



The Settings window will display automatically the first time you launch Rapid Recorder.

1. From the ANCILE uPerform Rapid Recorder toolbar, click **Settings**.



2. Select from the following options:


Field	Description
Interface Language	Select a language from the drop-down list.
Server Location	Enter your server location, if applicable.
Username	Enter a username.
Password	Enter the user password.
Trust invalid SSL certificates	Check Trust invalid SSL certificates, if applicable.
Test Connection	Click Test Connection to test that your connection to the uPerform server is working.
Proxy Settings	Select to bypass default proxy settings or enter a username and password for authentication.

3. Click **OK** when finished editing the ANCILE uPerform Rapid Recorder settings.

Using the Task List

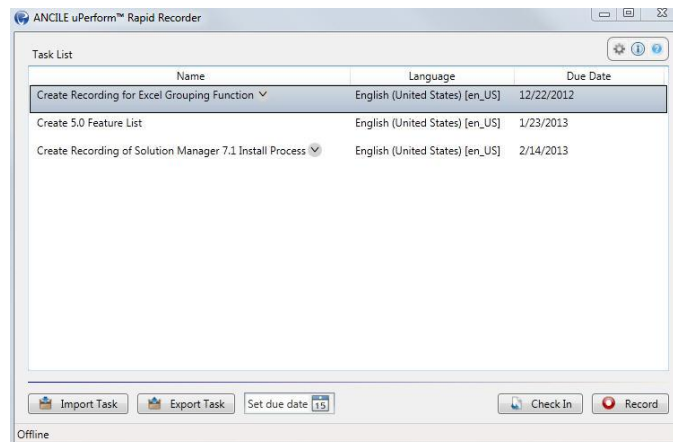
ANCILE uPerform allows project administrators to create and assign tasks using the uPerform server. Tasks provide a detailed description of what has been assigned to you for a given project. The task list displays your assigned tasks.

Viewing Your Task List

You can view and manage assigned tasks from ANCILE uPerform Rapid Recorder. The Task List includes the name of the task, the language associated to the task, and due date. If a description for the task was included, you can view the description by clicking  to the right of the task name. Tasks also can be viewed from the uPerform client and uPerform server, if applicable.

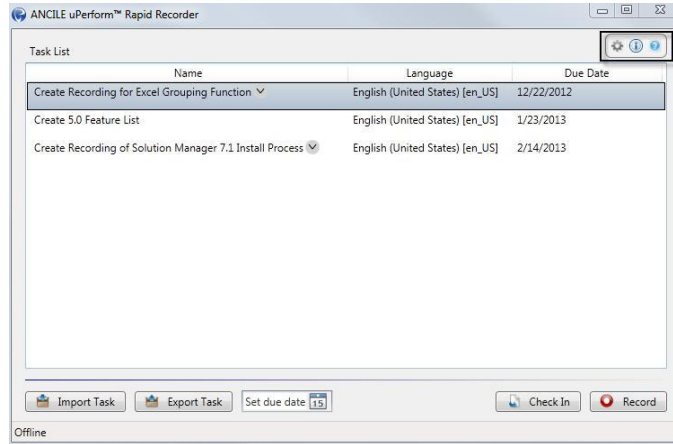


Only document tasks will be available from the Task List in Rapid Recorder.






Using the Task List Toolbar

The task list toolbar options are displayed in the upper right of the ANCILE uPerform Rapid Recorder window.



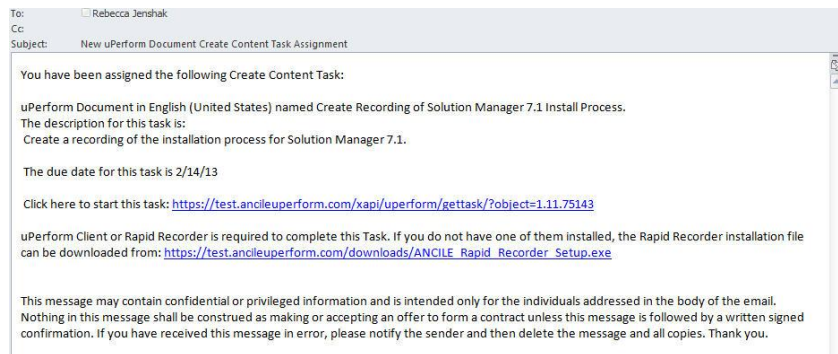
The following options are available via the toolbar:

Control	Description
	Opens the Settings window. For more information, refer to Specifying ANCILE uPerform Rapid Recorder Settings (on page 7).
	Displays version and copyright information for ANCILE uPerform Rapid Recorder.
	Turns on Help mode to provide on-screen help for ANCILE uPerform Rapid Recorder functionality.

Opening Tasks from the Email Notification

When a project administrator assigns a task you will receive an email notification that includes the task name, language, description, due date, and links to open the task or download Rapid Recorder.

1. Open the email notification.



2. Click the link to start the task.
3. Click **Open**.



If you have Rapid Recorder installed you will be automatically directed to the task in your Task List.

Importing a Task

You can import a task from your local computer to ANCILE uPerform Rapid Recorder. Importing a task may be necessary when saving a task from an email notification or when receiving a task file from another user.

1. From the ANCILE uPerform *Rapid Recorder Task List* screen, click **Import Task**.
2. Navigate to the .task file on your local computer and click **Open**.

Changing the Task Due Date

1. Select a task from the *Task List*.
2. Click **Set Due Date**.
3. Select a new date for the task completion.

Exporting a Task

Tasks can be exported from the task list and saved to your computer. Tasks may need to be exported to send to other users or for other reasons, as needed.



While connected to the uPerform server, you cannot export a task that has been previously downloaded from the server.

1. Select a task from the *Task List*.
2. Click **Export**.
3. Browse to specify a destination folder.
4. Click **OK**. The task is removed from the *Task List*.

Reopening a Task

If you have started a task and then stopped the recorder without checking in or completing the task you can reopen the task at a later time.

1. Select the task from the *Task List*.
2. Click **Record**.
3. Choose from the following options:

If You Want To	Then
Resume the task	Click Resume . The recorder will open in paused mode and previously recorded steps are displayed.
Restart the task	Click Restart . Click Yes to delete any previously recorded content. The recorder will open in paused mode.

Checking In a Task

After you have completed a task it can be checked into the uPerform server.

1. Select a task from the *Task List*.
2. Click **Check In**. The task is checked into the uPerform server and removed from the *Task List*.

Recording with ANCILE uPerform Rapid Recorder

Starting the ANCILE uPerform Rapid Recorder

1. Select **START > PROGRAMS > ANCILE UPERFORM > ANCILE UPERFORM RAPID RECORDER**.

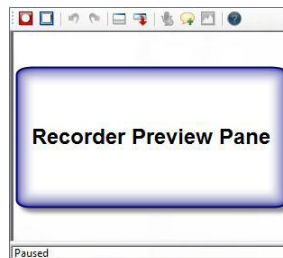


Optionally, you can open ANCILE uPerform Rapid Recorder from the task notification email.


2. Select a task from the *Task List*.
3. Click **Record**.

Displaying the Recorder Preview Pane

During recording, a real-time preview of the recorded actions is displayed in a preview pane in the *Recorder* window. The preview pane allows you to view data as it is captured by uPerform. The preview pane and window are not captured during recording.



You can hide or display the recorder preview pane.

Click  to toggle the display of the preview pane during recording.

Capturing Controls

The uPerform recorder captures a variety of interface objects, including screens, buttons, tabs, checkboxes, drag-and-drop actions, menu paths, edit fields, grids, trees, radio buttons, match codes, list items, and combo boxes.



ANCILE uPerform does not support recording on secondary monitors. If you use dual monitors, ensure that the application you want to record is displayed on the primary monitor.

The following table provides an overview of recorder capabilities, limitations, and the steps you must take to capture specific objects.


Object	Description	Required Steps
Edit Fields	The recorder captures field labels and data. The field name, a generic placeholder description, and the data that was entered will be captured.	<ol style="list-style-type: none"> 1. Click or tab in the field. 2. Type in the field. 3. Exit the field. <p>To capture default data, click or tab into the field containing the default data and exit the field. The default data and field name will be captured. In the document view, data is inserted into a Field/Description table.</p> <p>If a value exists in the field on exit, the recorder will capture this value. If the field is empty, the recorder captures a step without a value in the field.</p> <p>If you want to capture only the characters typed, instead of all characters in the field, change the <i>Capture Typing Text Mode</i> value to Typed Characters. For more information, refer to <i>Specifying Recorder Tuning Options</i>.</p>
Menu Paths	uPerform automatically records menu paths. The recorder captures menu text when you click on the text.	Simply execute the menu path, and the recorder will capture the first initial click as a step and then display the full menu path as a single step.
Grids	When entering data into a table, the field labels are typically located at the top of the column. The recorder will capture both the row and the column label.	<ol style="list-style-type: none"> 1. Click in the grid cell. 2. Enter data. 3. Click out of the cell.

Object	Description	Required Steps
Screens	New screens are captured automatically as you progress through a task.	<p>A screen image is captured for every step. The following types of actions will trigger a new screen shot to be displayed in the document view (In a simulation view each step is displayed with its corresponding screen image.). The order that the criteria are applied is as follows:</p> <ol style="list-style-type: none"> 1. When you take an action on a screen, the recorder checks if the screen title is different than the previous steps screen title. If yes, a new screen image is displayed. 2. If the screen title did not change, the recorder checks if the dimensions of the active region are different than the screen captured for the previous step. If yes, a new screen image is displayed. 3. If the previous action was performed on a tab or a menu item control, a new screen image is displayed. <p>The recorder also captures the last screen upon stopping the recording process.</p>
Match Codes, Buttons, Checkboxes, Combo Boxes, Tree Items, Tab Controls, Labels, Links, Radio Buttons, and Images	The recorder captures match codes, the button image, the checkbox or radio button and the associated label, and any other images on which you click.	<p>Click on the button, checkbox, radio button, or image.</p> <p>If you are planning to Re-Record and are selecting a combo box, be sure to click a selection in a combo box, even if the default value in the combo box is not the one desired.</p>
Combination Keystrokes	Keystrokes are captured and recorded as new steps.	<p>Type combinations keystrokes Ctrl+N and Alt+F are supported.</p> <p>Command combination keystrokes ALT+TAB, CTRL+ALT+DEL, and ALT+ESC are not supported.</p>
Function Keys	Function keys are captured and recorded as new steps.	Type the function keys F1-F9, F11, and F12.


Using Undo and Redo

The undo and redo options allow you to remove and restore data captured during recording.


Using Undo During Recording

Click  on the *Recorder* window to remove the last item recorded.




You can click  more than once to remove additional items that have been recorded. The undo functionality caches up to nineteen steps.

Using Redo During Recording


Click  on the *Recorder* window to restore the last item that was removed with the undo function.



You can click  more than once to restore additional items that were removed.

Minimizing the Recorder Window

You can minimize the *Recorder* window to the Microsoft Windows task tray.

Click  on the *Recorder* window to minimize the window during recording.




To restore the window display, right-click on the icon in the task tray and select **Show Toolbar**.




Using Audio with ANCILE uPerform Rapid Recorder

The audio option allows you to capture audio while recording an application.



Testing Audio

The first time you click  on the *Recorder* window, the *Audio Testing* window displays.



1. Select a recording device from the drop down list.
2. Click  and record audio.
3. Click  once you have finished recording audio.
4. Click  to playback the file. This button is disabled until there is an audio file available for playback.
5. Click **OK** when finished.


Using Audio During Recording

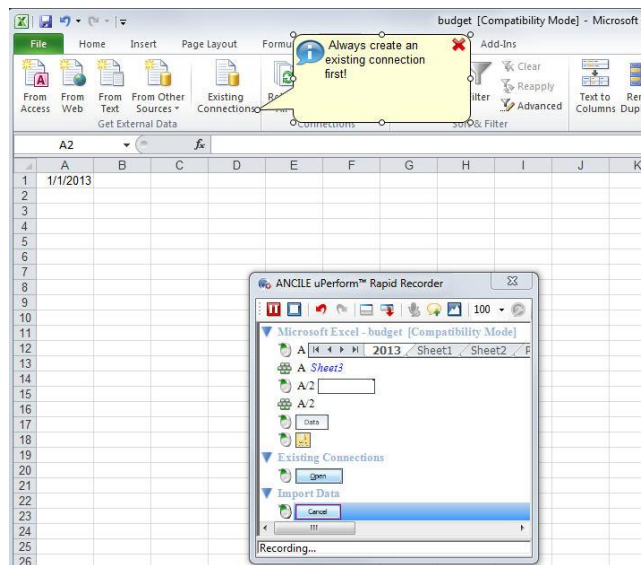
1. Click  on the *Recorder* window to start capturing audio.
 Audio is captured only when the recorder is recording.
2. Record audio and then capture the associated step. Audio is associated to the next recorded step.
3. When finished capturing audio, click **Turn off Audio recording** or click **Stop**. Stopping the recording will also turn off audio capture.

Using Notes

ANCILE uPerform Rapid Recorder allows you to insert notes into the recording to help explain an action or to provide details regarding the next recorded step.

Inserting Notes

1. Click  on the *Recorder* window to create a new note.
2. Insert text into the note, as needed.



3. Select the note and resize or move it, as needed.



Inserted notes are associated to the next recorded step. Notes disappear from the screen and cannot be edited or deleted after you start or continue the recording.

4. Insert another note, as needed, or record your next step.

Deleting Notes


Notes can only be deleted before recording the associated step. To delete a note, click **X** in the upper right corner of the note.

Pausing and Stopping the Recorder

You can pause the recorder during the data capture process. While the recorder is paused, you can open other applications and perform other tasks without recording those actions.

When you have finished recording, you must stop the recorder to complete processing and save your content.


Pausing the Recorder

Click  on the Recorder window to pause the recorder.



Remember to resume recording when you are ready.

Stopping the Recorder

Click  on the *Recorder* window to stop the recorder.






After stopping the recorder you will receive a prompt asking if you would like to check in the task.

Using Image Mode

The image mode option allows you to capture a specific area of the screen that does not have clearly defined edges or boundaries. The resulting image is inserted into your content as a new step.


Using Image Mode During Recording

1. Open a document and record at least one step in the desired application window.
2. Click  on the *Recorder* window to activate image mode.
 The cursor displays as a crosshair.
3. Click in the window where you want to capture an image.
4. Click and hold the left mouse button as you drag a rectangle around the image you want to capture.
5. Release the mouse button to turn off image mode and capture the selected area.
 The image will be inserted as a new step.

Turning On Help Mode

On-screen help is available in ANCILE uPerform Rapid Recorder.

Turning On Help Mode in ANCILE uPerform Rapid Recorder

Click  on the Recorder window to toggle help mode on and off. When help mode is turned on, on-screen help is available when you hover over any toolbar button.

Exiting

If you attempt to exit the ANCILE uPerform Rapid Recorder while recording, you will receive a prompt asking if you would like to check in the task.

Exiting the ANCILE uPerform Rapid Recorder

Select **Close** from the ANCILE uPerform Rapid Recorder menu bar or click **X** in the top right corner of the Recorder.

Uninstalling

The ANCILE uPerform Rapid Recorder application can be uninstalled from your computer using standard Microsoft Windows Installer uninstall functionality.

Uninstalling ANCILE uPerform Rapid Recorder

1. Select **START > CONTROL PANEL > PROGRAMS > UNINSTALL A PROGRAM**.
2. Select **ANCILE uPerform Rapid Recorder** from the *Currently installed programs* list.
3. Click **Uninstall**.
4. Click **Yes** at the prompt to confirm.
5. Close the *Uninstall* window.



Any required items that were downloaded, such as ANCILE Capture Engine, will need to be uninstalled separately.

Glossary of Terms

ANCILE uPerform

The ANCILE uPerform application is a content development and delivery tool designed to enable authors and administrators to create, manage, and distribute documents, simulations, and eLearning courses.

Help Mode

On-screen help available in Rapid Recorder.

Image Mode

Allows you to capture a specific area of the screen that does not have clearly defined edges or boundaries.

Notes

A short statement called out in the recording to aid the end user by providing additional information on the topic.

Rapid Recorder

A stand-alone, streamlined recorder that can be used to record your actions in Microsoft Windows, web-based, and enterprise applications.

Task List

A list of tasks assigned to you. The task list is available from ANCILE uPerform, the uPerform server, or ANCILE uPerform Rapid Recorder.

uPerform Server

The application used to store, manage, and distribute documents, simulation, and courses.

Index

A

- audio
 - recording • 17
 - testing • 17

C

- capturing
 - controls • 13
- check in
 - tasks • 11
- controls
 - capture • 13

D

- deleting
 - notes • 18
- download
 - rapid recorder • 5

E

- exit
 - rapid recorder • 22
- export
 - tasks • 11

I

- import
 - tasks • 10
- inserting
 - notes • 18

N

- notes
 - deleting • 18
 - inserting • 18

P

- pausing
 - recorder • 19

R

- rapid recorder
 - downloading • 5
 - exiting • 22
 - overview • 4
 - pausing • 19
 - recording • 12
 - redo • 15
 - settings • 7
 - starting • 12
 - stopping • 19
 - undo • 15
 - uninstalling • 23

recording

- audio • 17

redo

- recording • 15

S

- starting
 - recorder • 12
- stopping
 - recorder • 19

T

- tasks
 - checking in • 11
 - exporting • 11
 - importing • 10
 - viewing • 8
- testing
 - audio • 17

U

- undo
 - recording • 15
- uninstalling
 - rapid recorder • 23

V

- view
 - tasks • 8