

Oracle Guided Learning 24A Release Notes

FEATURE DESCRIPTION	ROLE	ADDITIONAL INFORMATION
IMPORTANT NOTE	Administrator Developer	<ul style="list-style-type: none"> This document may be updated periodically as new updates, changes, or fixes are implemented after the scheduled quarterly release. Refresh this document regularly for updates and note the document version in the page footer for the latest information.
Changes to OGL Sign-In Screen	Administrator Developer	<ul style="list-style-type: none"> This enhancement to the OGL sign-in screen removes the option for users to sign in to the OGL console with their OGL Account login and password. Users must sign into the OGL console using either an Oracle Account or their company's federated Single Sign On (SSO). This enhancement aligns OGL with industry security best practices and improves user security.
Diagnostic Tool	Administrator Developer	<ul style="list-style-type: none"> This new feature allows content developers to diagnose different types of guide issues they may encounter and efficiently troubleshoot them from within the application. This feature adds an additional option for content developers to independently troubleshoot and remediate common types of guide issues without the need to contact support. Content developers can enable the diagnostic tool on any page of the host application to quickly identify and resolve common guide issues.
Guide Lifecycle Management Using Labels	Administrator Developer	<ul style="list-style-type: none"> This enhancement to guide labels enables administrators and content developers to manage guides more effectively and collaboratively throughout the content lifecycle. With this enhancement, console users can create, manage, and assign custom labels to guides for use in organizing and filtering guides accordingly to their labels. Labels can also be created, assigned, and managed for multiple guides as a bulk action.
Redwood Design Guide Editor - Advanced Guide Activation and Time Conditions	Administrator Developer	<ul style="list-style-type: none"> This enhancement to the Redwood Design Guide Editor adds the ability for content developers to add and manage advanced guide activation and time conditions from within the editor.

FEATURE DESCRIPTION	ROLE	ADDITIONAL INFORMATION
Guide Activation: Part I of II - Allow creating condition based on end-user's First Login	Administrator Developer	<ul style="list-style-type: none"> This enhancement to guide activation allows administrators and developers to display a guide (new features/welcome) to users based upon the user's first login date. This adds flexibility to activation conditions by allowing guides to be triggered and activated based on the user's first login to the host application.
Analytics Report Enhancement – User Variables	Administrator Developer	<ul style="list-style-type: none"> This enhancement to OGL Analytics Reports allows administrators to capture user variables associated with the embed script in the analytics and have them displayed as a column in the report download. This feature requires a setting to be enabled by an Oracle administrator to include user defined fields in Analytics reports. To request this option, please submit a service request.
Saved Analytics Searches	Administrator Developer	<ul style="list-style-type: none"> This enhancement to the OGL console allows administrators to easily save filter parameters as "Saved Searches" in the Analytics Dashboard. This adds efficiency and convenience in managing guides in the future by allowing users to save and re-use filter parameters.
Auto-Resizing Tooltips for Multi-Language Guides	Administrator Developer	<ul style="list-style-type: none"> This enhancement adds the ability when using multi-languages guides to have tooltips automatically resize depending on the amount of text in each language independently. Tip width and length for all the translated languages are not dependent on the English guide and will auto-resize depending on the amount of text on each tool tip.
Fusion Seeded Roles	Administrator Developer	<ul style="list-style-type: none"> This enhancement to the OGL console helps content developers and administrators to better manage custom roles that are used in guide activation conditions. This enhancement also flags Guide Health Errors when undefined roles are used in guide activation conditions.
Remind Me Later Enhancement	Administrator Developer	<ul style="list-style-type: none"> This enhancement to the existing Remind Me Later functionality allows end-users in the host application to temporarily hide auto-launched guides and to specify a time delay for the guide to relaunch at a later time that may be more convenient for user to take action. The Remind Me Later option is now enabled in the Guide Settings of the guide card in the OGL console as well as in the Redwood Guide Editor.

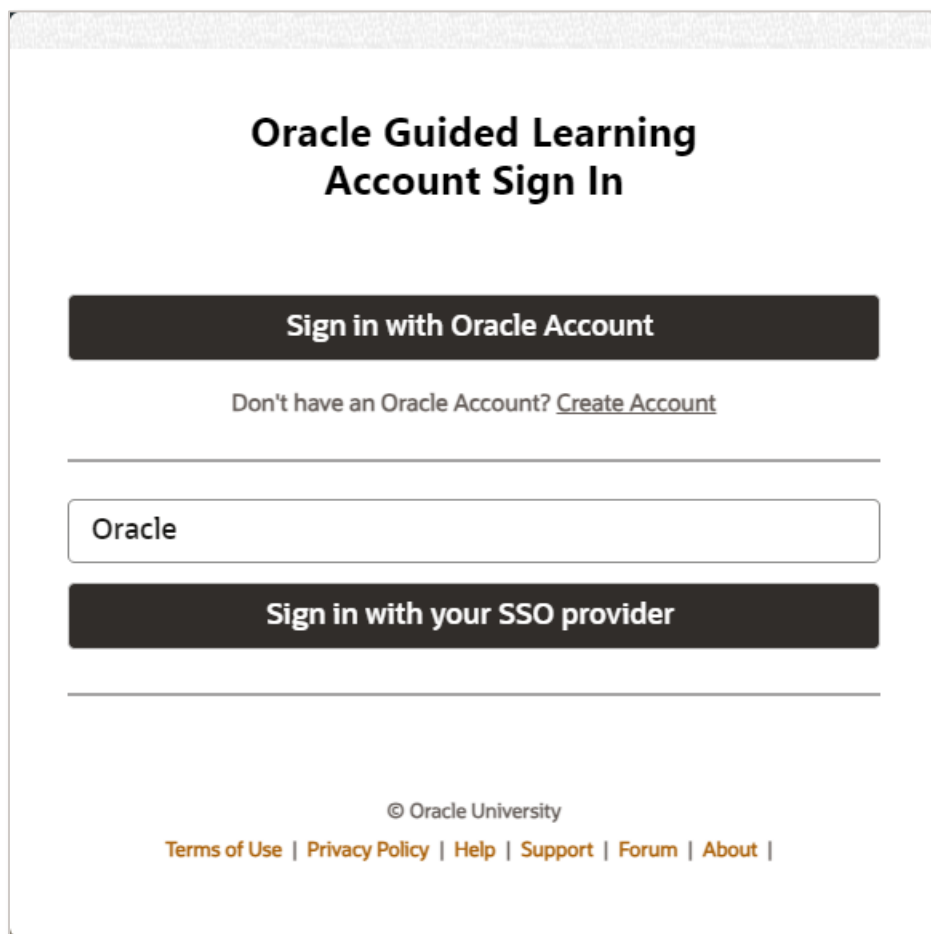
CHANGES TO OGL SIGN-IN SCREEN

To enhance data security and privacy, OGL is changing the way that users sign in to the OGL console. Beginning in OGL 24A, you must sign in to the OGL console using your **Oracle Account** or your company's Federated Single Sign-On (SSO)*.

If you do not have an **Oracle Account**, you can easily [create one](#). This is the same account that you use to access other Oracle services, such as Customer Connect, My Oracle Support, and My Learn. When creating your **Oracle Account**, please be sure to use the same email address that is associated with your OGL account.

The OGL Account sign-in option will be removed in OGL 24A. Please switch to your **Oracle Account** to sign in to OGL as soon as possible.

Note: If you wish to sign in to OGL using your company's Single Sign-On (SSO), you will need to request a one-time configuration to federate your company's SSO with OGL. Please contact your OGL account manager for details or log an OGL support ticket.



The screenshot shows the Oracle Guided Learning Account Sign In screen. At the top, the title "Oracle Guided Learning Account Sign In" is centered. Below the title, there is a dark button labeled "Sign in with Oracle Account". Underneath this button, the text "Don't have an Oracle Account? [Create Account](#)" is displayed. A horizontal line separates this section from the next. Below the line is a text input field containing the word "Oracle". Underneath the input field is another dark button labeled "Sign in with your SSO provider". Another horizontal line follows. At the bottom of the screen, the copyright notice "© Oracle University" is centered, followed by a row of links: "Terms of Use | Privacy Policy | Help | Support | Forum | About |".

DIAGNOSTIC TOOL

This new feature allows content developers to diagnose different types of guide issues they may encounter and efficiently troubleshoot them from within the application.

This feature adds an additional option for content developers to independently troubleshoot and remediate common types of guide issues without the need to contact support.

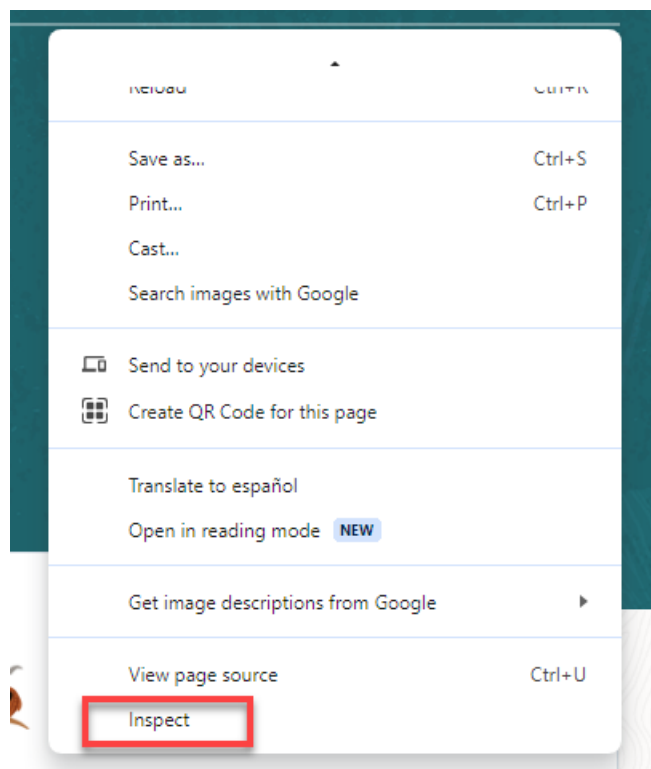
Content developers can enable the diagnostic tool on any page of the host application to quickly identify and resolve common guide issues.

Some common questions that this tool can help to answer include:

- What user fields are set for this user? (maybe the guides are not launching because the field you are expecting is not set.)
- Is OGL embedded with env = dev or prod?
- How do I identify the page I am on?
- What guides are currently running on this page? (this can be used to identify which guide is displaying an unwanted tooltip)

Launching the Diagnostic Tool

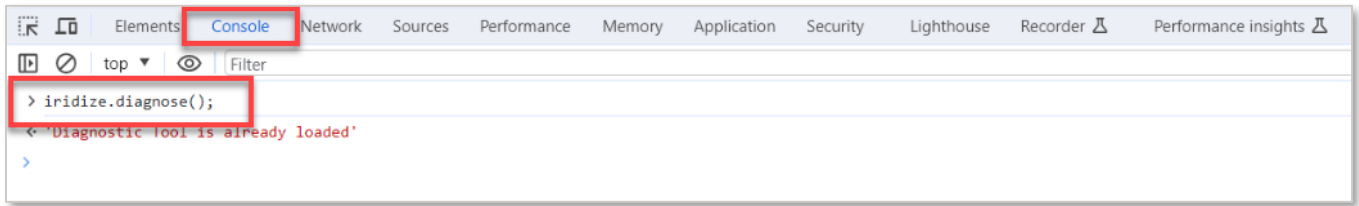
To invoke the Diagnostic Tool from any page on the host application, right-click anywhere on the page, then select **Inspect**.



In the Inspect panel, select **Console**, then enter the following text string into the command line:

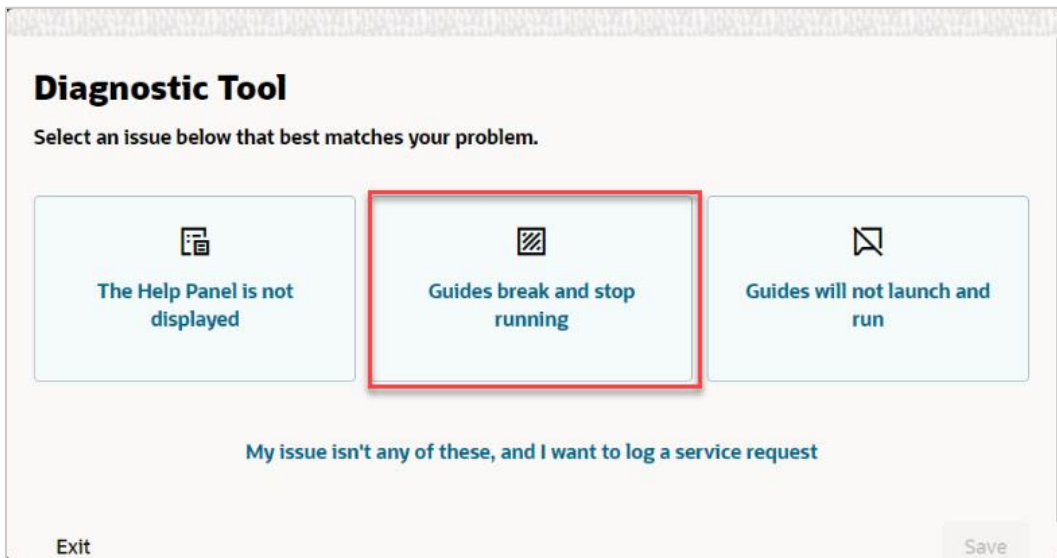
```
iridize.diagnose();
```

Then press the **Enter** key



The Diagnostic Tool will open. Select an issue that best matches the issue that you are experiencing.


(**Note:** You may close the Inspect panel to expand the browser back to normal size.)




The Diagnostic Tool will display any errors it identifies with a description of the error that includes relevant information about the guide error, including: AppID, Environment, OGL Server, Page ID, User Information (if applicable), Guide Name, ApiName, and Error Description.

App ID: , Environment: dev
OGL Server: <https://guidedlearning-dev.oraclecorp.com>,
Page ID: /FndOverviewTF/FndOverviewPF|/FndFuseTabTF/FndMultiTabsPF/ManageEmploymentTF/ManageEmployment|/FndFuseTabTF/FndMultiTabsPF/ManageEmploymentLATF/ManageEmploymentLA|/FndFuseTabTF/FndMultiTabsPF/ActionHeader/Act...
User Info: userId: EA1258B1B3123D77E040548C2C040FC9, userName: CASEY.BROWN, userRole: [ApprovalDuty33]

Process



Guide Name: Process Guide Step Branch and Step Conditions Test
ApiName: 6f2zysrm



Log a service request

Resolve the issue

Error: Guide breaks due to element not found.
(Step 5)

Exit

Save

Select **Resolve the issue** to be guided to the relevant OGL user documentation where you can find information on how to resolve this issue.

If this does not resolve the issue, you can also select **Log a service request** to be directed to the appropriate OU Support page to submit a request for support.

Select **Save** if you wish to download a text file containing all relevant information about this issue, which can be provided to the Support team to help facilitate a resolution more quickly.

Known Issues / Expected Behavior

- The Diagnostic Tool will only work with **OGL 24A Player Package** and is not backward compatible to applications relying on an older version of OGL's Player Package (prior to 24A).

GUIDE LIFECYCLE MANAGEMENT USING LABELS

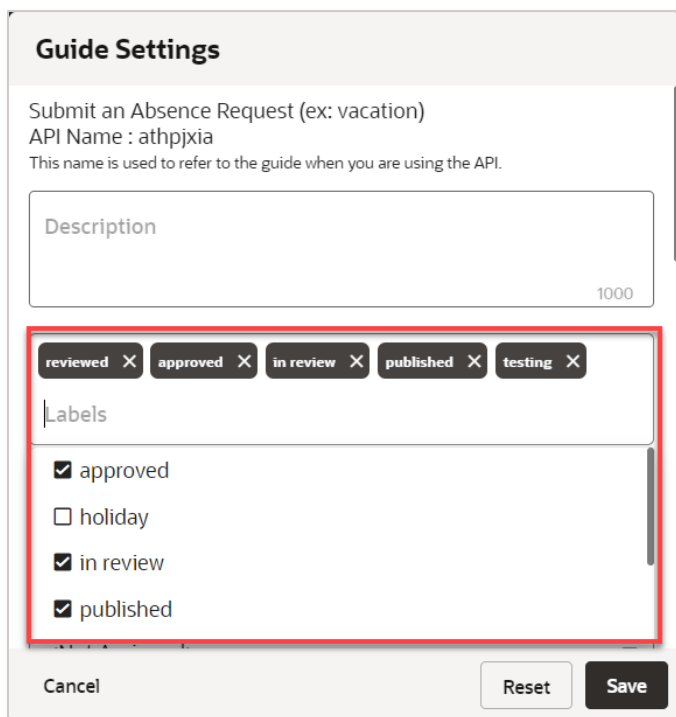
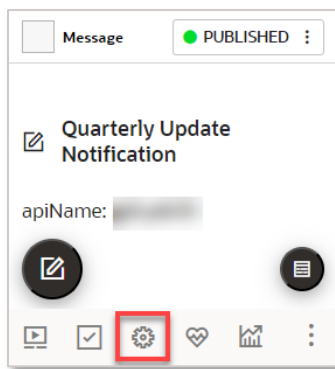
As an OGL content developer or content manager working in collaboration with others, you may need to quickly understand the status of guides throughout the content development cycle, and easily find the guides that you need to work on, so that you can efficiently take action on tasks that are your responsibility.

This enhancement enables administrators and content developers to better manage guides throughout the content lifecycle by employing custom labels that clearly identify the status of your guides accordingly to your own organizational needs.

With this enhancement, console users can create, manage, and assign custom labels to guides for use in organizing and filtering guides accordingly to their custom labels. Labels can also be created, assigned, and managed for multiple guides as a bulk action.

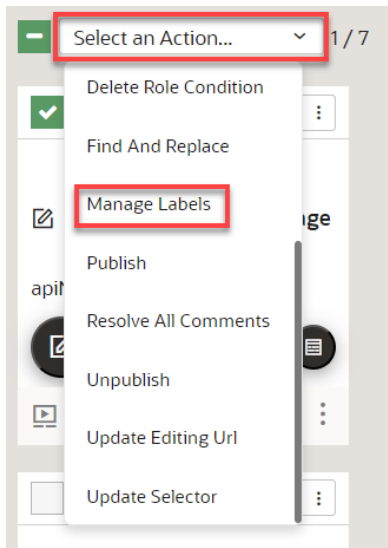
Managing labels for individual guides

For individual guides, labels can be created, assigned, or removed at the guide level by using the **Guide Settings**:

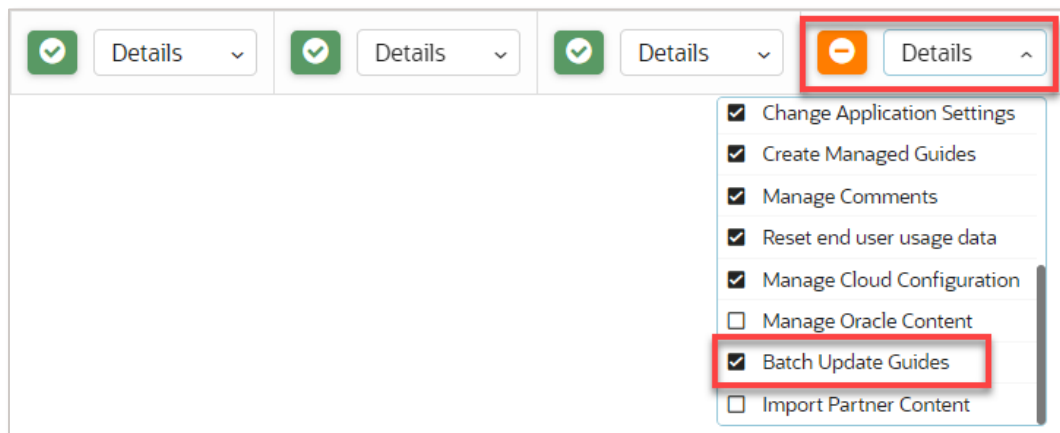


Managing labels for multiple guides (Bulk Action)

For multiple guides, labels can also be created, assigned, edited, or removed in bulk by using the **Manage Labels** action in the **Bulk Actions** menu:

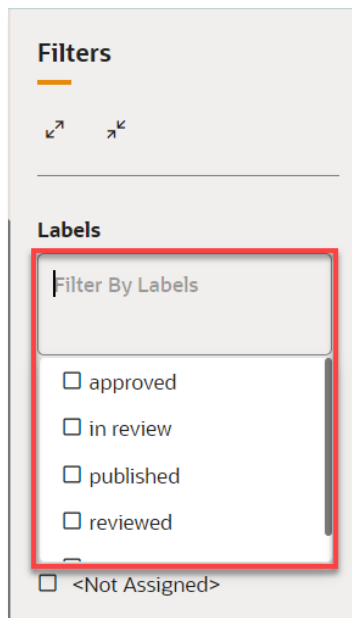


Note: The Mange Labels bulk action requires the Owner role > Batch Update Guides permission:



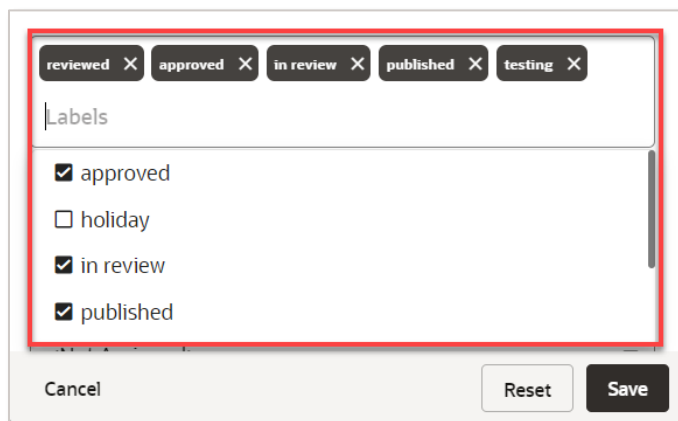
Filtering Guides by Labels

Once labels are assigned to guides, you can filter guides based upon their labels by using the **Labels** filter in the OGL console located on the right side of the My Content page:



Known Issues/Expected Behavior

- Once labels are created, they will automatically populate in the Labels field in the Guide Settings and Manage Labels modals only for the AppID on which the labels were created.
- While you can create, assign, or remove labels for individual guides or multiple guides, you will not be able to delete any labels once they have been created. Look for an enhancement to this feature in a future release.



REDWOOD DESIGN GUIDE EDITOR - ADVANCED GUIDE ACTIVATION AND TIME CONDITIONS

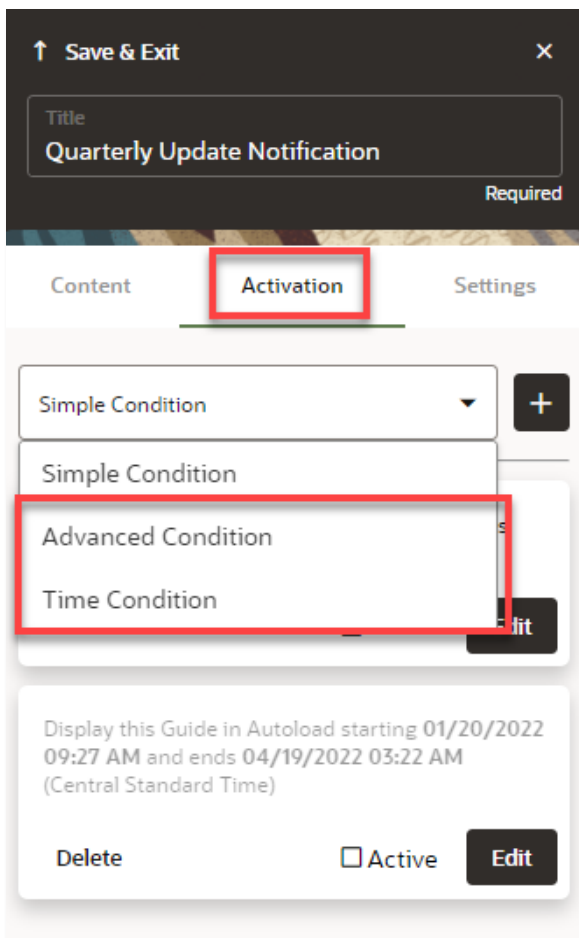
This enhancement to the Redwood Design Guide Editor expands on the existing functionality for content developers to add and manage guide activation conditions from within the editor without having to return to the console.

With this enhancement, the Activation tab now allows content developers to conveniently add and manage **Simple Conditions**, **Advanced Conditions**, and **Time Conditions** for a guide directly from within the editor, adding more efficiency and convenience.

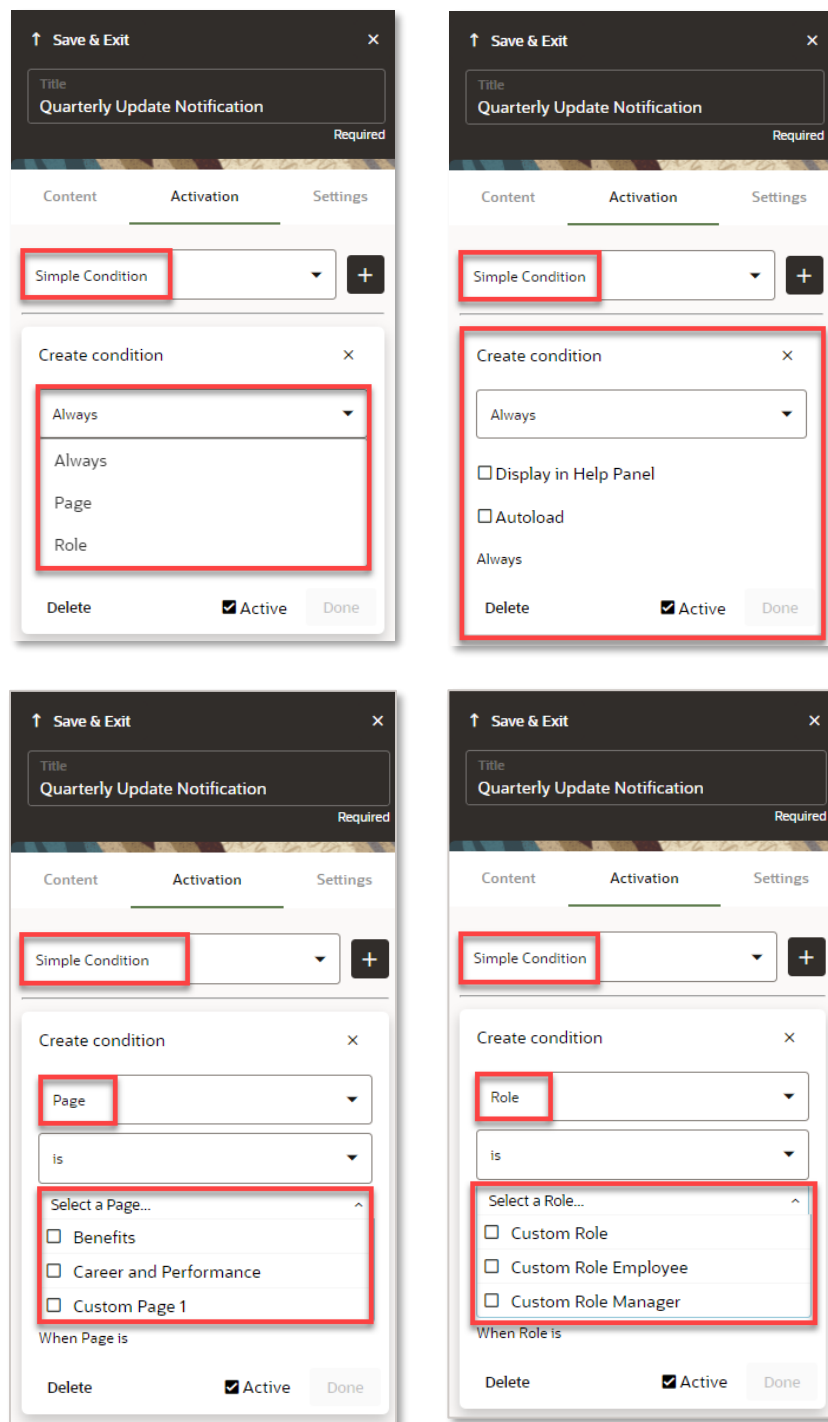
Included in this enhancement are changes that have been applied to the UI components in the OGL console to maintain overall consistency in design and user experience between the Redwood Design Guide Editor and the Guide Activation settings modal in the console. (See **UI/UX Enhancements**)

With this enhancement, console users will be able to perform the following actions directly from the Redwood Design Guide Editor:

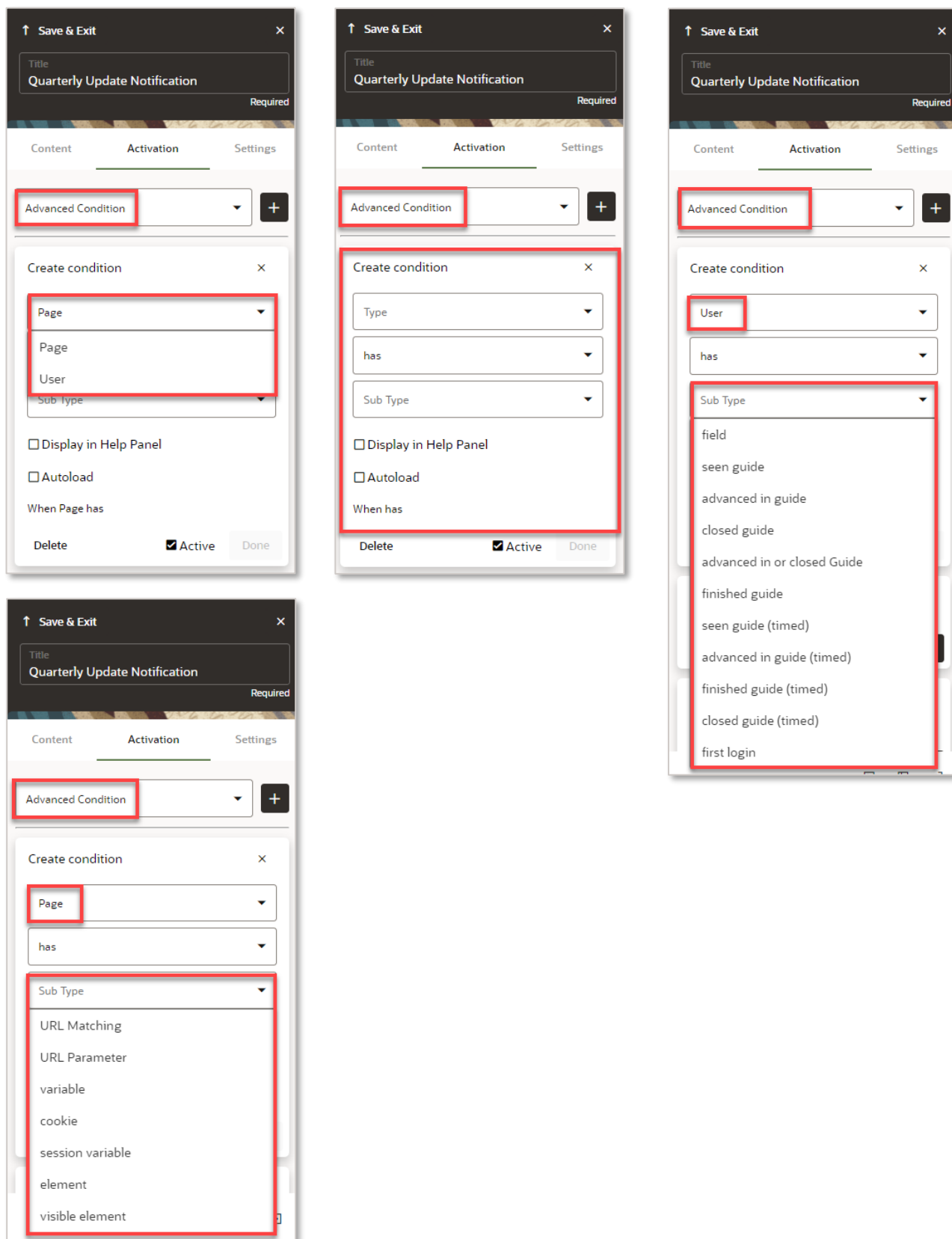
- Navigate to guide activation conditions
- Add Simple, Advance, and Time activation conditions
- Enable or disable activation conditions
- Edit activation conditions
- Delete activation conditions



Adding a Simple Condition in Redwood Editor



Adding an Advanced Condition in Redwood Editor



Time Condition in Redwood Editor

↑ Save & Exit

Title

Quarterly Update Notification

Required

Content

Activation

Settings

Time Condition

Create condition

Display date starts:

Enter value

and display ends:

Enter value

☐ Display in Help Panel

☐ Autoload

Delete

☒ Active

Done

↑ Save & Exit

Title

Quarterly Update Notification

Required

Content

Activation

Settings

Time Condition

Create condition

Display date starts:

Enter value

1/8/2024, 12:29 AM

and display ends:

Enter value

1/12/2024, 12:29 AM

☐ Display in Help Panel

☒ Autoload

Display this Guide in Autoload starting 01/08/2024 12:29 AM and ends 01/12/2024 12:29 AM (Central Standard Time)

Delete

☒ Active

Done

GUIDE ACTIVATION - ALLOW CREATING CONDITION BASED ON END-USER'S FIRST LOGIN

This enhancement to guide activation allows administrators and developers to display a guide (new features/welcome) to users based upon the user's first login date.

This adds flexibility to activation conditions by allowing guides to be triggered and activated based on the user's first login to the host application.

For example, you may want to display a guide for a new user only within the first 30 days since their first login. In this case, you could apply the following Advanced Condition:

The screenshot shows the 'Guide Activation' configuration window. At the top, the 'Guide Name' is 'Diagnostic Tool Demo 1'. Below it, the 'Advanced Condition' dropdown is highlighted with a red box. A modal window titled 'Create condition' is open, showing a sequence of conditions: 'User' (dropdown), 'has' (dropdown), 'first login' (dropdown, highlighted with a red box), and 'less than' (dropdown). Below these, a time picker shows 'Days' set to '30' (highlighted with a red box), 'Hrs.' set to '00', 'Min.' set to '00', and 'Sec.' set to '00'. The word 'ago' is below the time picker. There is a checkbox for 'Display in Help Panel' which is unchecked, and a checkbox for 'Autoload' which is checked (highlighted with a red box). At the bottom left is a 'Cancel' button, and at the bottom right is a 'Save & Exit' button.

ANALYTICS REPORT ENHANCEMENT – USER VARIABLES

For OGL customers who use custom-defined user variables in their embed script, this enhancement to OGL Analytics Reports allows administrators to capture these user variables in the analytics and have them displayed as a column in the report download.

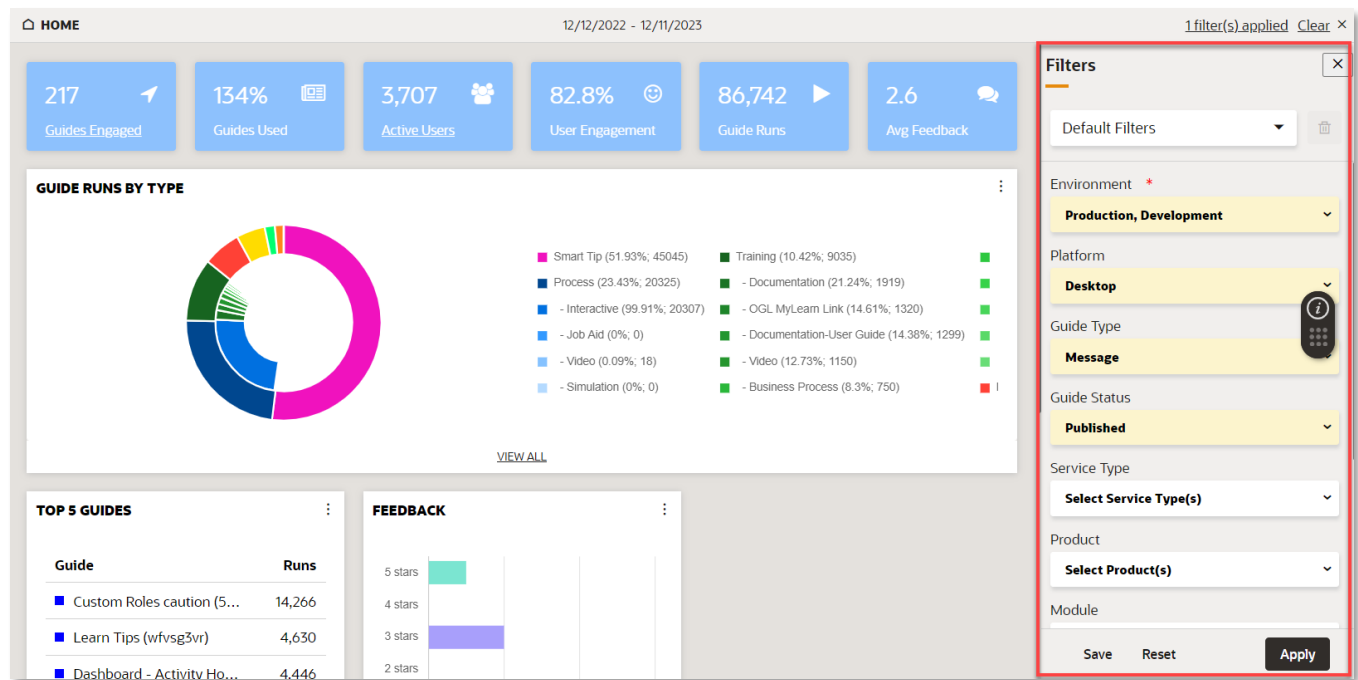
This feature requires the OGL administrator to customize their OGL Javascript API (JS API) and defined the user variables they wish to call. Additionally, you will need to submit a service request to have an Oracle administrator enable the “Include user defined fields in Analytics reports” on your AppID.

Once the above configuration has been applied, you can include these user variables in your Analytics Reports:

SAVED ANALYTICS SEARCHES

This enhancement to the OGL console allows administrators to easily save filter parameters as "Saved Searches" in the Analytics Dashboard.

This adds efficiency and convenience in managing guides in the future by allowing users to save and re-use filter parameters.



Saving Analytics Filters

When applying filter parameters in OGL Analytics, you may wish to save these parameters for future use to efficiently reapply the same filter. Once you have set your filter parameters, select **Save** at the bottom of the **Filters** panel:

The image shows two parts of the OGL Analytics interface. On the left is the 'Filters' panel, which has a close button (X) in the top right. It features a 'Default Filters' dropdown menu with a trash icon. Below this are several filter categories: 'Environment' (marked with a red asterisk), 'Platform', 'Guide Type', 'Guide Status', 'Service Type', 'Product', and 'Module'. Each category has a dropdown menu. The 'Environment' dropdown is currently set to 'Production, Development'. The 'Platform' dropdown is set to 'Desktop'. The 'Guide Type' dropdown is set to 'Message'. The 'Guide Status' dropdown is set to 'Published'. The 'Service Type' dropdown is set to 'Select Service Type(s)'. The 'Product' dropdown is set to 'Select Product(s)'. The 'Module' dropdown is empty. At the bottom of the panel are three buttons: 'Save' (highlighted with a red box), 'Reset', and 'Apply'. On the right is the 'Save Filters' dialog box. It has a title bar and a 'Filter Name' input field containing the text 'Published Desktop Messages'. Below the input field are two buttons: 'Cancel' and 'Save Filters' (highlighted with a red box).

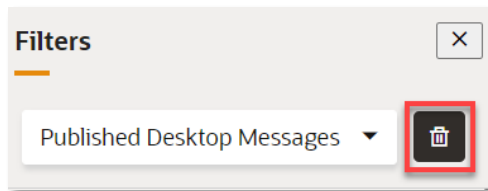
Applying Saved Filters

To reapply the saved filter in the future, simply select it from the Filters dropdown menu at the top of the Analytics Filters panel.

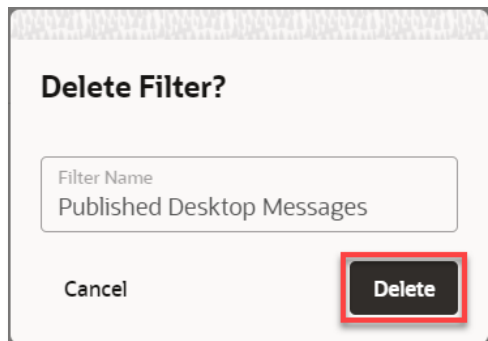
The image shows the 'Filters' panel with the 'Default Filters' dropdown menu open. The dropdown menu lists 'Default Filters' and 'Published Desktop Messages'. The 'Published Desktop Messages' option is highlighted with a red box. The 'Filters' panel also shows the 'Environment' dropdown set to 'Production, Development'.

Deleting Saved Filters

To delete any saved filters, select it from the Filters dropdown menu, then select the **Trash** button to the right.



Select **Delete** to confirm.



A confirmation message will appear at the top of the page.



Known Issues/Expected Behavior

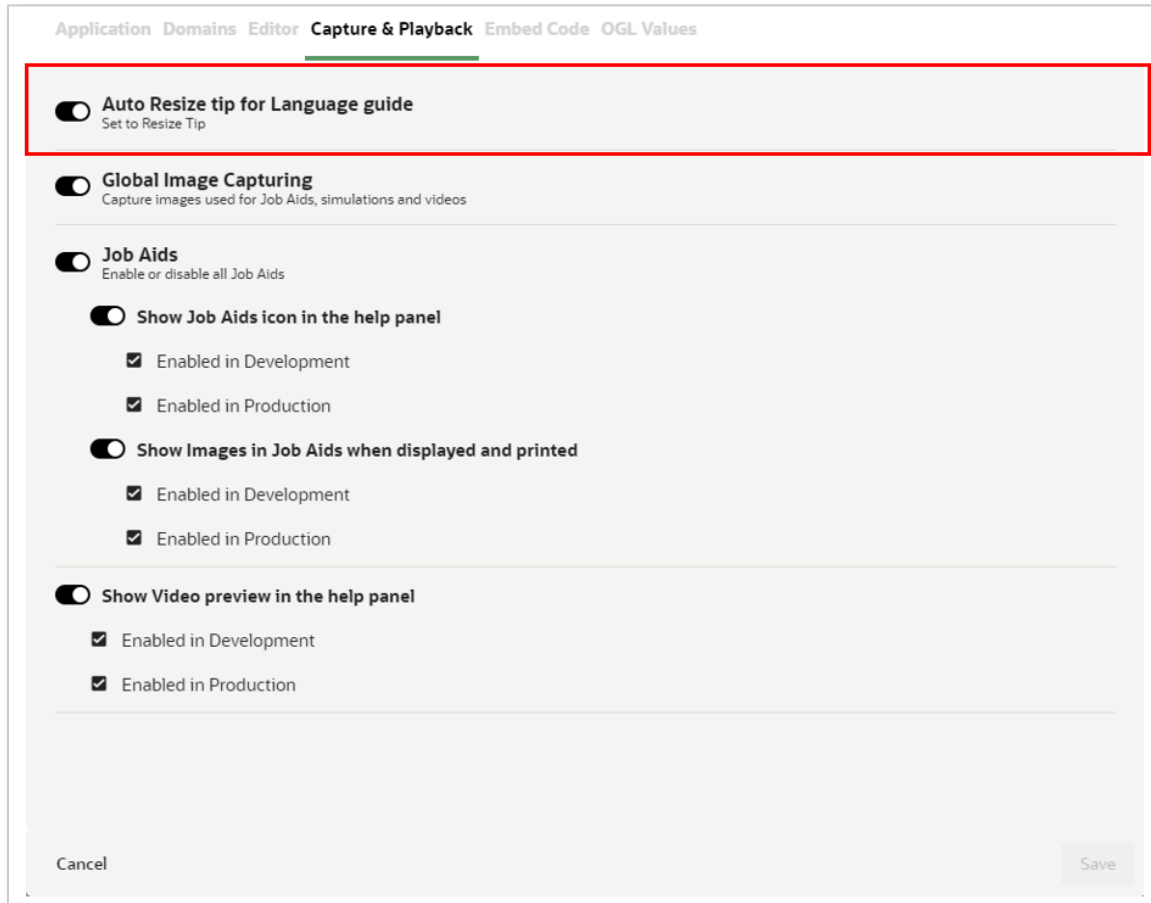
Saved Analytics Filters are specific to the AppID in which they were created and cannot be applied to another AppID. You will need to recreate the saved filters on each AppID on which you wish to apply them.

AUTO-RESIZING TOOLTIPS FOR MULTI-LANGUAGE GUIDES

There may be times when guide text is longer in a translated language than it is in the default language. This enhancement enables content developers to have tooltips automatically resize depending on the amount of text in each language independently.

Tip width and length for all the translated languages are not dependent on the English guide and will auto-resize depending on the amount of text on each tool tip.

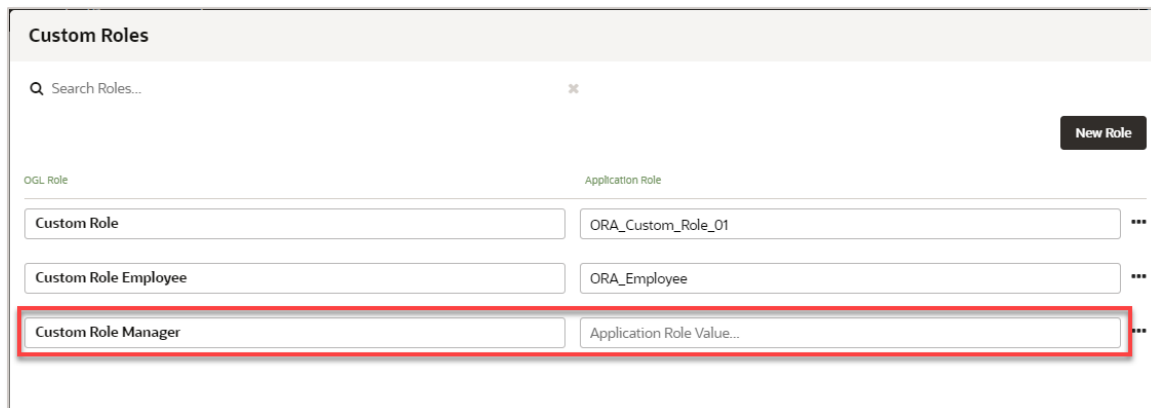
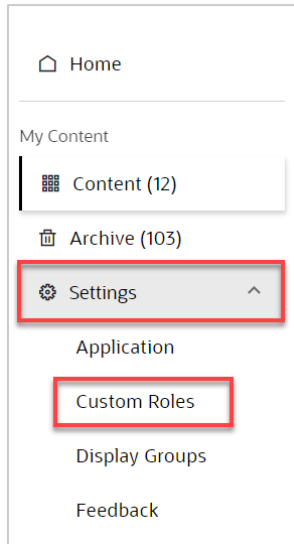
To enable auto resizing of tips for translated guides, go to **Settings > Application > Capture & Playback** and look for the turn on the following setting:



FUSION SEEDED ROLES

This enhancement to the OGL console helps content developers and administrators to better manage custom roles that are used in guide activation conditions.

You may have a Custom Role that is not mapped to an associated Application Role



When applying a role-based guide activation condition that references this unmapped role, you will see the following alert appear in the Guide Activation settings:

Guide Activation

Guide Name : QGB Demo

Simple Condition

Edit condition

Role

is

Custom Role Manager

☒ Display in Help Panel

☐ Autoload

Display this Guide in Help Panel When Role is Custom Role Manager

Some Roles are not defined

Delete

☒ Active

Done

Cancel

Save & Exit

This enhancement also flags Guide Health Errors when undefined roles are used in guide activation conditions.

Process

INACTIVE

QGB Demo

apiName: nof61cfh

Health

The following guides have issues or errors that need to be fixed for the guide to work properly.

nof61cfh

Name	Api Name	Step Id	Date	Error	Severity		
QGB Demo	nof61cfh		2024-01-08	Some of the role conditions has undefined role(s)	Critical	HIDE	DISMISS

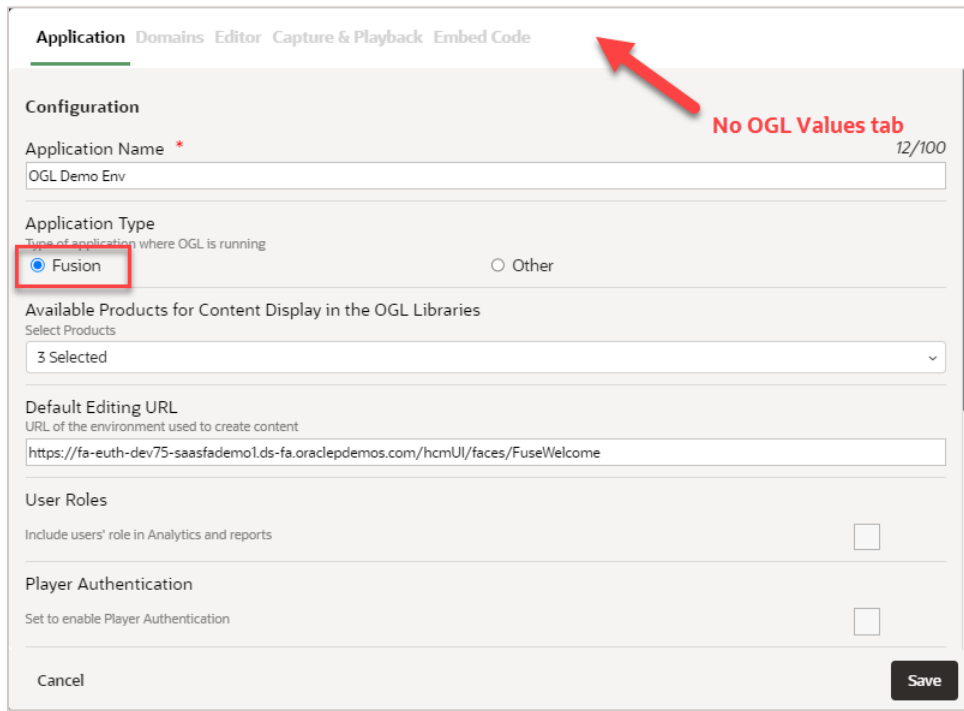
total: 1 hidden: 0

☐ Show hidden items

HIDE ALL

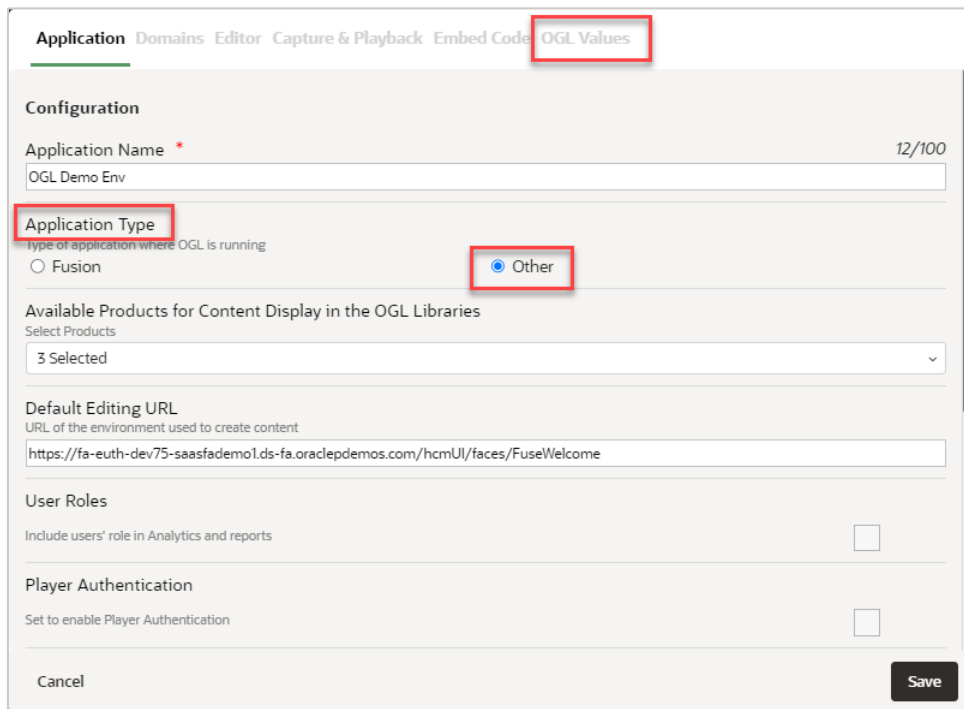
DISMISS ALL

With this enhancement, the **OGL Values** tab in the Application settings modal has been removed for Fusion customers, where the Application Type is set to “Fusion”.

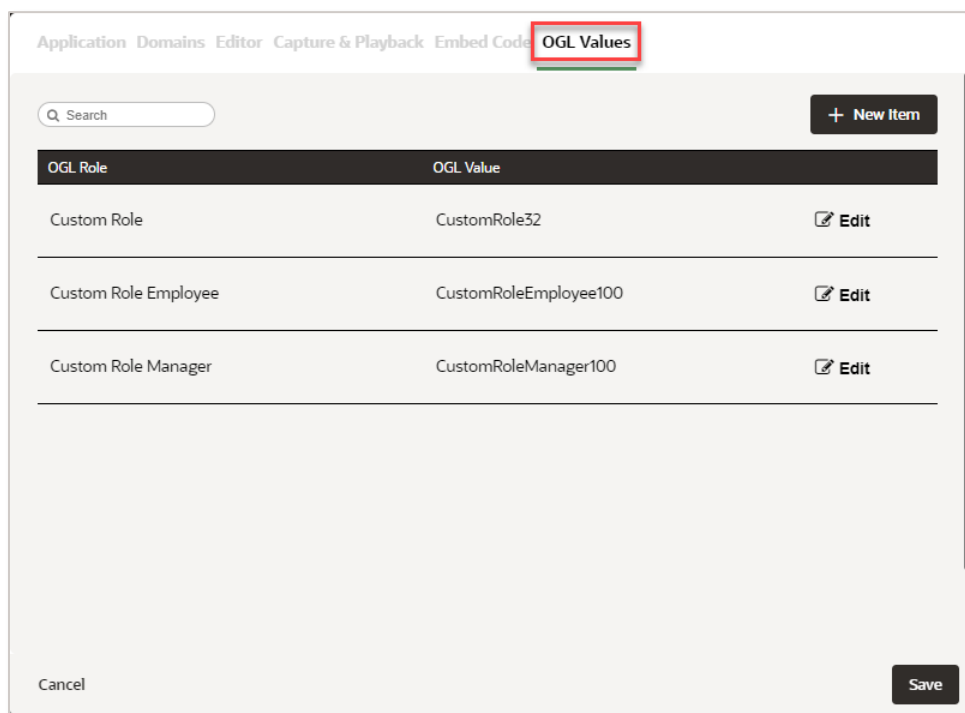


The screenshot shows the 'Application' settings modal with the 'Application' tab selected. The 'Application Type' is set to 'Fusion', which is highlighted with a red box. A red arrow points to the 'OGL Values' tab, which is not visible, with the text 'No OGL Values tab' next to it. The modal includes fields for 'Application Name' (OGL Demo Env), 'Available Products for Content Display in the OGL Libraries' (3 Selected), 'Default Editing URL' (https://fa-euth-dev75-saasfademo1.ds-fa.oraclepdemos.com/hcmUI/faces/FuseWelcome), 'User Roles' (Include users' role in Analytics and reports), and 'Player Authentication' (Set to enable Player Authentication). The 'Save' button is at the bottom right.

However, for non-Fusion customers, where the Application Type is set to “Other”, the **OGL Values** tab will still display, allowing administrators to manage their customer role mappings.



The screenshot shows the 'Application' settings modal with the 'Application' tab selected. The 'Application Type' is set to 'Other', which is highlighted with a red box. The 'OGL Values' tab is visible and highlighted with a red box. The modal includes fields for 'Application Name' (OGL Demo Env), 'Available Products for Content Display in the OGL Libraries' (3 Selected), 'Default Editing URL' (https://fa-euth-dev75-saasfademo1.ds-fa.oraclepdemos.com/hcmUI/faces/FuseWelcome), 'User Roles' (Include users' role in Analytics and reports), and 'Player Authentication' (Set to enable Player Authentication). The 'Save' button is at the bottom right.



Known Issues/Expected Behavior

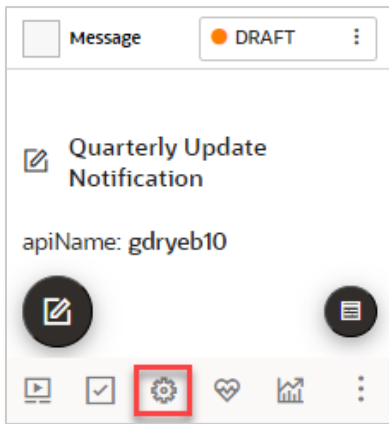
When an OGL Administrator adds guides from another content library, such as Base Guides, to My Content, any pre-existing (or seeded) roles will be also added to the Custom Roles table to maintain consistent role mapping.

This is also applicable for guides that are imported using the Import Partner Content feature.

REMIND ME LATER ENHANCEMENT

With this enhancement to guide behavior in the host application, content developers and administrators can enable an option at the guide level that allows end-users to postpone a launched guide and to specify a time when the guide should reappear. This allows end-users in the host application to temporarily hide auto launched guides and set them to reappear at a time that is more convenient for them to take action without having to close the guide.

To enable the Remind Me Later option on any guide, select the **Guide Setting** button on the guide card. (You can also select the Settings tab in the Redwood Design Editor.)



Scroll down and select the **Remind Me Later** checkbox.

When the guide is launched in the host application, end-users will see a **Remind me later** button on the bottom left of the guide. Selecting this button presents the user with options to temporarily close the guide and have it reappear after a set time period (20 minutes, 1 hour, 3 hours, the next day, or the next week). This will reset the guide to reappear at the selected time interval.

Quarterly Update Alert!

Oracle Cloud will be receiving the 22D quarterly update. During the update the system will be unavailable!

The estimated schedule is below:

Start Date	Start Time	Available Date	Available Time
Friday, Jan 12	12:00 a.m.	Saturday, Jan 13	12:00 a.m.

Remind me later

In 20 minutes

In 1 hour

In 3 hours

Tomorrow

Next Week

Got it

Known Issues/Expected Behavior

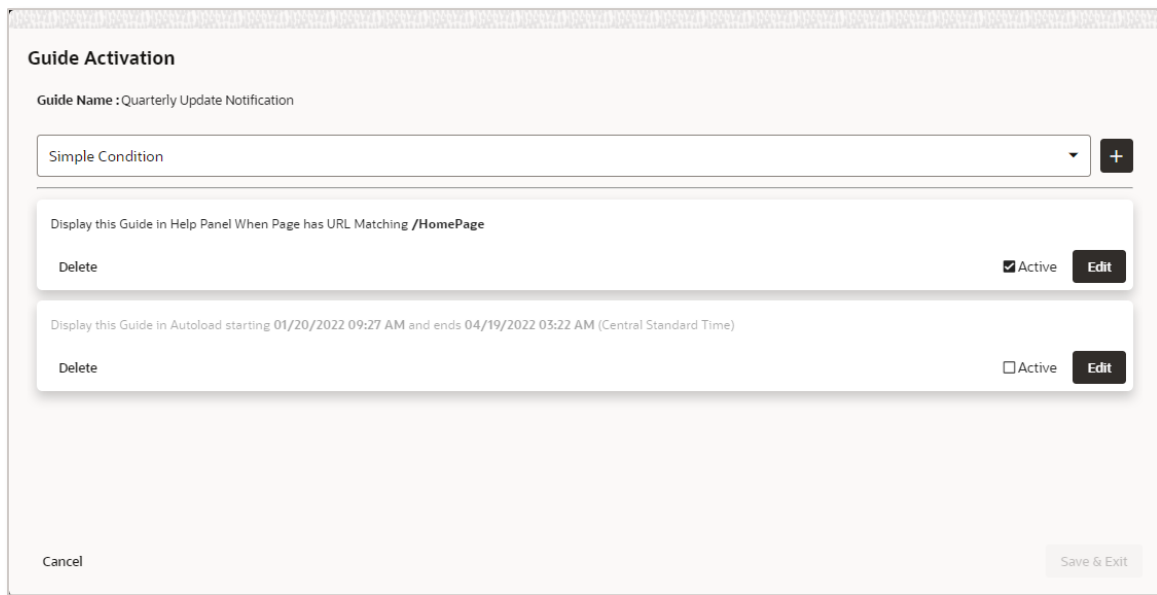
- Remind Me Later functionality applies only to the following guide types: process, message, beacon, smart tip, and survey.
- The Remind Me Later button will only appear on the first step of a guide.
- Depending upon guide activation conditions, the Remind Me Later function may not cause the guide to reappear if the selected time interval is outside of the parameters of the guide activation conditions (for example, where the selected Remind Me Later interval is beyond the specified time period of a time condition)

UI/UX ENHANCEMENTS

Guide Activation UI Enhancement

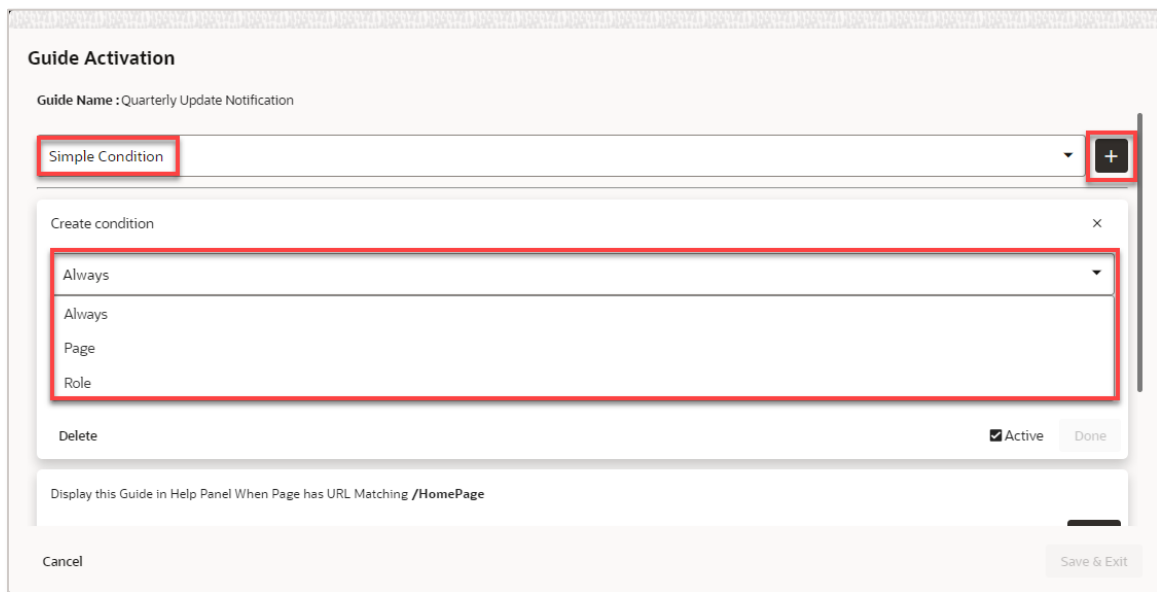
As part of the Redwood Design Guide Editor enhancement which adds the ability for console users to add and manage guide activation conditions, the UI for the Guide Activation settings modal in the OGL console has also been enhanced to maintain an overall consistent design and user experience.

When you open the Guide Activation settings modal from a guide card in the OGL console, you will see that the UI has now been updated. The below screenshots are examples of the newly enhanced Guide Activations modal UI.



The screenshot shows the 'Guide Activation' modal for a guide named 'Quarterly Update Notification'. At the top, there is a dropdown menu currently set to 'Simple Condition' with a '+' button to its right. Below this, there are two existing activation conditions, each in a light gray box. The first condition is 'Display this Guide in Help Panel When Page has URL Matching /HomePage', with a 'Delete' button on the left, a checked 'Active' checkbox, and an 'Edit' button on the right. The second condition is 'Display this Guide in Autoload starting 01/20/2022 09:27 AM and ends 04/19/2022 03:22 AM (Central Standard Time)', with a 'Delete' button on the left, an unchecked 'Active' checkbox, and an 'Edit' button on the right. At the bottom left is a 'Cancel' button, and at the bottom right is a 'Save & Exit' button.

Adding a Simple Condition



This screenshot shows the same 'Guide Activation' modal, but with the 'Create condition' dialog box open. The 'Simple Condition' dropdown and its '+' button are highlighted with red rectangles. The 'Create condition' dialog has a close 'x' button at the top right. It contains a dropdown menu with 'Always' selected, and a list of other options: 'Always', 'Page', and 'Role'. Below the list is a 'Delete' button, a checked 'Active' checkbox, and a 'Done' button. The background modal shows the first condition 'Display this Guide in Help Panel When Page has URL Matching /HomePage'. At the bottom are 'Cancel' and 'Save & Exit' buttons.

Adding a Simple Page Condition

The screenshot shows the 'Guide Activation' dialog box. At the top, it says 'Guide Name : Quarterly Update Notification'. Below this is a dropdown menu with 'Simple Condition' selected, highlighted by a red box. To the right of the dropdown is a '+' button. Below the dropdown is a 'Create condition' section. It contains three dropdown menus: 'Page' (highlighted by a red box), 'is', and 'Benefits' (highlighted by a red box). Below these are two checkboxes: 'Display in Help Panel' (unchecked) and 'Autoload' (checked). Below the checkboxes is the text 'Display this Guide in Autoload When Page is Benefits'. At the bottom of the 'Create condition' section is a 'Delete' button. To the right of the 'Delete' button are two buttons: 'Active' (checked) and 'Done'. At the bottom of the dialog box are two buttons: 'Cancel' and 'Save & Exit'.

Adding a Simple Role Condition

The screenshot shows the 'Guide Activation' dialog box. At the top, it says 'Guide Name : Quarterly Update Notification'. Below this is a dropdown menu with 'Simple Condition' selected, highlighted by a red box. To the right of the dropdown is a '+' button. Below the dropdown is a 'Create condition' section. It contains three dropdown menus: 'Role' (highlighted by a red box), 'is', and 'Custom Role Employee' (highlighted by a red box). Below these are two checkboxes: 'Display in Help Panel' (unchecked) and 'Autoload' (checked). Below the checkboxes is the text 'Display this Guide in Autoload When Role is Custom Role Employee'. At the bottom of the 'Create condition' section is a 'Delete' button. To the right of the 'Delete' button are two buttons: 'Active' (checked) and 'Done'. At the bottom of the dialog box are two buttons: 'Cancel' and 'Save & Exit'.

Adding an Advanced Condition

Guide Activation

Guide Name : Quarterly Update Notification

Advanced Condition +

Create condition

Type

Page

User

Sub-type

☐ Display in Help Panel

☐ Autoload

When has

Cancel Save & Exit

Adding an Advanced Page Condition

Guide Activation

Guide Name : Quarterly Update Notification

Advanced Condition +

Create condition

Page

has

URL Matching

URL Matching

URL Parameter

variable

cookie

session variable

element

visible element

Adding an Advanced User Condition

The screenshot shows the 'Guide Activation' dialog with the 'Guide Name' set to 'Quarterly Update Notification'. The 'Advanced Condition' dropdown is selected and highlighted with a red box. Below it, the 'Create condition' panel is open, showing a dropdown for 'User' (also highlighted with a red box), a dropdown for 'has', and a large dropdown for 'Sub Type' which is expanded to show a list of options including 'field', 'seen guide', 'advanced in guide', 'closed guide', 'advanced in or closed Guide', 'finished guide', 'seen guide (timed)', 'advanced in guide (timed)', 'finished guide (timed)', 'closed guide (timed)', and 'first login'.

Adding a Time Condition

The screenshot shows the 'Guide Activation' dialog with the 'Guide Name' set to 'Quarterly Update Notification'. The 'Time Condition' dropdown is selected and highlighted with a red box. Below it, the 'Create condition' panel is open, showing the 'Display date starts:' field with the value '1/8/2024, 6:30 PM' and the 'and display ends:' field with the value '1/12/2024, 6:30 PM', both highlighted with a red box. Below these fields are checkboxes for 'Display in Help Panel' (unchecked) and 'Autoload' (checked). At the bottom, a summary line states: 'Display this Guide in Autoload starting 01/08/2024 06:30 PM and ends 01/12/2024 06:30 PM (Central Standard Time)'. The dialog has 'Cancel' and 'Save & Exit' buttons at the bottom.

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