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Contextualizing content

This document will reveal all you need to know about the contextualization of content. Contextualization allows you to provide users with precise assistance with the application they are currently using.

In Quick Access, the context is used to provide users with quick and targeted help with the applications they are currently running during the work process. The help they receive can consist of documents and links but also of structural elements, such as processes, courses and topics.

The Context field is primarily a technical field that cannot be translated and which is usually identical for all the language variants of a document.

If the document or link has been published, it will appear in QuickAccess in accordance with the context in the assigned Performance Support Category.

1 Context and document

In the case of Producer documents, the context of the IT application that was recorded is automatically determined and stored in the Producer document. Whenever the recording is subsequently enhanced to include additional steps, the context will be automatically adapted. If the document is uploaded, the current valid context is always transferred to the document's metadata. This ensures that all the contexts that were determined during the recording are always available to QuickAccess and that the end user always receives all information on the IT application and, if necessary, even on their specific location within the IT application.

If necessary, this context can be subsequently edited manually in the document properties. However, when doing this you need to remember that the automatic compilation of contexts from all the recordings included in the document (as described above) is then no longer possible.

The following rules therefore generally apply:

For Producer documents
(the setting is made in the document properties in the Document Editor):

- **Producer documents with a recording:** *Edit context manually* is not set. The context is determined based on the recording included in the document and this is transferred to the document's metadata on the server when the document is uploaded.
- **Producer documents without a recording:** *Edit context manually* is set. The context can now be adapted via the document properties in the Document Editor or via the metadata that are stored on the server. Both fields are managed synchronously.

For Creator documents:

In the case of Creator documents with recorded content, the context of the recorded IT application is automatically determined and stored in the Creator document. If the recording is subsequently extended to include additional steps, the context will be automatically

adjusted. Upon saving the document, the updated context is always passed on to the document's metadata. This ensures that all contexts determined via the recording are always available to QuickAccess and that the end user always receives all information about the IT application and, where possible, even about the specific position within the IT application.

For other documents:

The context only exists in the metadata that are stored on the server, where it can be adapted at any time.

2 Context and structural elements

As already mentioned above, structural elements – such as a topic, course or process – can also be displayed in QuickAccess. This involves storing the context in the Context field in the metadata. You can determine the context via the Fingerprint button in QuickAccess.

If the structural element has been published, it will appear in QuickAccess in accordance with the context in the assigned Performance Support Category.

3 Reserved context hashtags

Reserved context hashtags were developed to complement the SIOS feature (SIOS: Search In Other Sources). The Search In Other Sources function is designed to allow the display of additional, context-sensitive search sources and to pass on the various components of the QuickAccess search to these external search engines. Further information can be found under the SIOS search term.

The reserved **context hashtags** that are available for this scenario enable documents to always be displayed in certain search situations.

- #all: Documents with this context are ALWAYS displayed, i.e. in every QuickAccess search result, and are automatically assigned to the PSC with the technical name "sios-show-always".
- #hasUserSearchInput: Documents with this context are always displayed if a UserSearchInput exists, i.e. the technically determined context was either manually overwritten or supplemented. These documents are also automatically assigned to the PSC with the technical name "sios-show-always".
- #pinned: This works in the same way as "all", meaning that it is always displayed, but assigned to the Performance Support Category with the technical name "pinned".
- #other: This can be added for defined contexts (e.g. Word 2019) to ensure that the document continues to be displayed even when restricted via a user search.