



**Business Solutions**

Putting The Pieces Together

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# ***QuickDoc***

*SAP Transaction Documenter*

## ***User Guide***

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# Welcome!

QuickDoc is a fast and efficient tool for creating user documentation for SAP transactions. As you run SAP transactions, it automatically inserts into Microsoft Word all of your inputs, key presses, button-clicks etc. - along with screen-shots of the SAP screens that you are using and pictures of the buttons that you have clicked.

QuickDoc loads as an Add-In to Word and requires no additional skills to use - if you can run an SAP transaction and can use Word, you can use QuickDoc!

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## Typical Users

Anyone that wants to quickly document how to run SAP transactions can use QuickDoc. All that is required is Microsoft Word and an understanding of the transactions to be documented.

Its primary audience are those people engaged in producing end-user training documentation, but it is certainly not limited to that activity. Helpdesk and support staff can easily use QuickDoc to quickly produce instructions to users struggling to run a transaction or sequence of transactions. The converse is also true – users can use QuickDoc to record the problems they are encountering when trying to run a transaction.

The more you use QuickDoc the more uses you will find for it.

# Quick Install Guide

Installing QuickDoc is usually very simple but, because of the nature of SAP, it can sometimes require some additional SAP set-up. Full details are given in the section 'Installation Guide' but, usually, the information below is sufficient to get up and running with QuickDoc.

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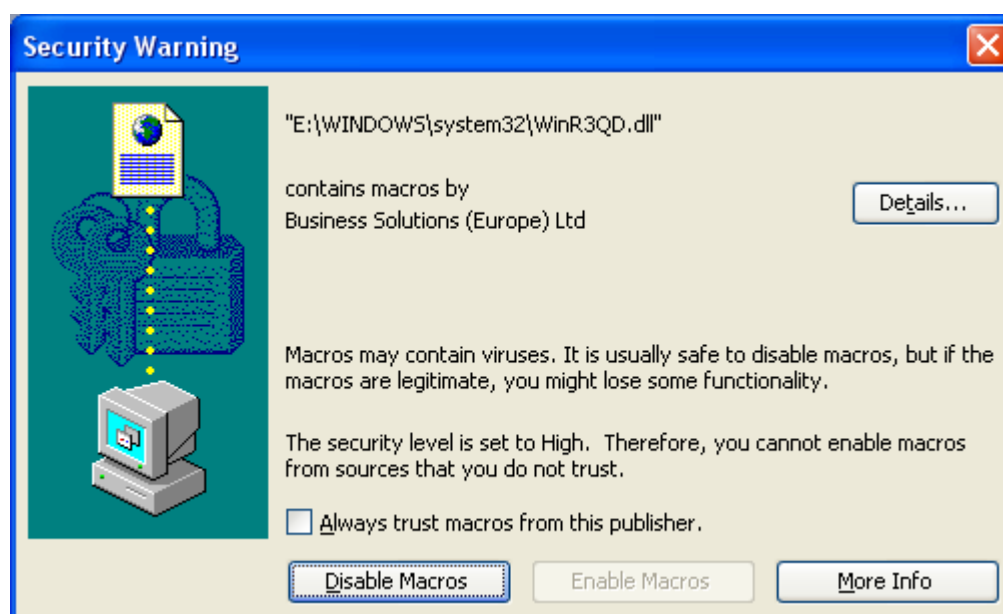
## Installation and System Requirements

Firstly, you **MUST** have a version of Word that is from Microsoft Office 2000 or above. Earlier versions of Word use a different Add-In mechanism that is **not** compatible with QuickDoc. Once you're happy that you have a suitable version of Word, run the install program to install QuickDoc as an Add-In to Word. It is recommended that you follow the prompt to re-start your computer.

If you have any difficulties, please contact support.

### Installing In Word

After completing the QuickDoc installation, you should run Word to verify that QuickDoc has installed correctly. On starting Word you may (depending upon your security settings) receive a pop-up similar to the following:



The next action depends upon whether you the above pop-up appears. If it does appear, then proceed as follows:

- Click the 'Details' button. Verify that there is a digital signature from Business Solutions (Europe) Ltd.. Click 'OK' to return to the previous screen, as shown above.
- Click the check-box:



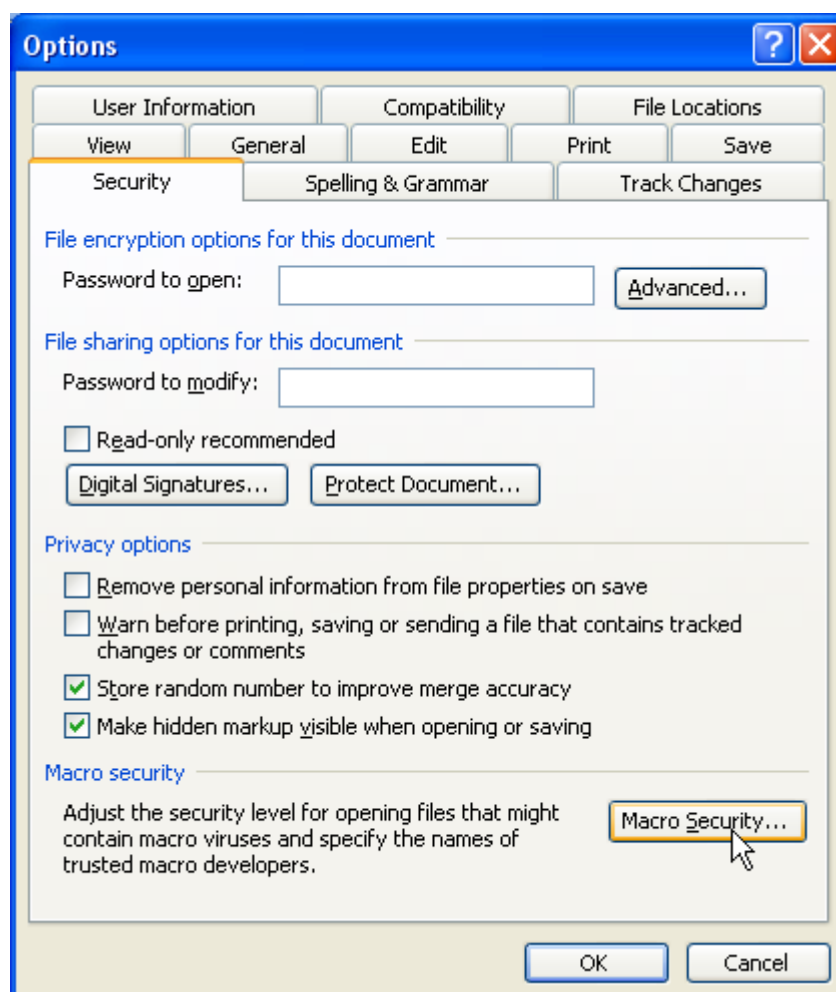
- Click the button 

- The QuickDoc toolbar should now be visible in Word:



If you did not see the above pop-up window, it is most likely due to your Macro Security settings.

- Choose Tools > Options from the Word menu, and click the 'Security' tab on the pop-up window.

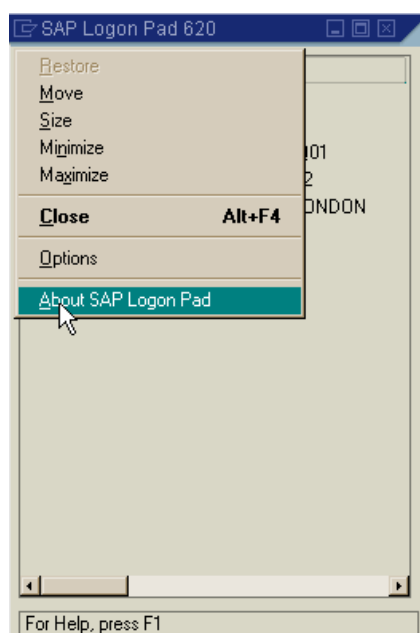


- Click the 'Macro Security...' button, as show above.
- It is recommended that you have your macro security level set to 'High' or 'Medium'. If you have it set at 'Low' you may be vulnerable to unfriendly macros and Add-Ins.
- If 'Low' is set, QuickDoc will have installed without the pop-up and will still run correctly.
- If 'Very High' is set (available from Office 2003), you will need to change this to 'High'.

If you have any difficulties, please contact support.

## Checking Your SAP Environment

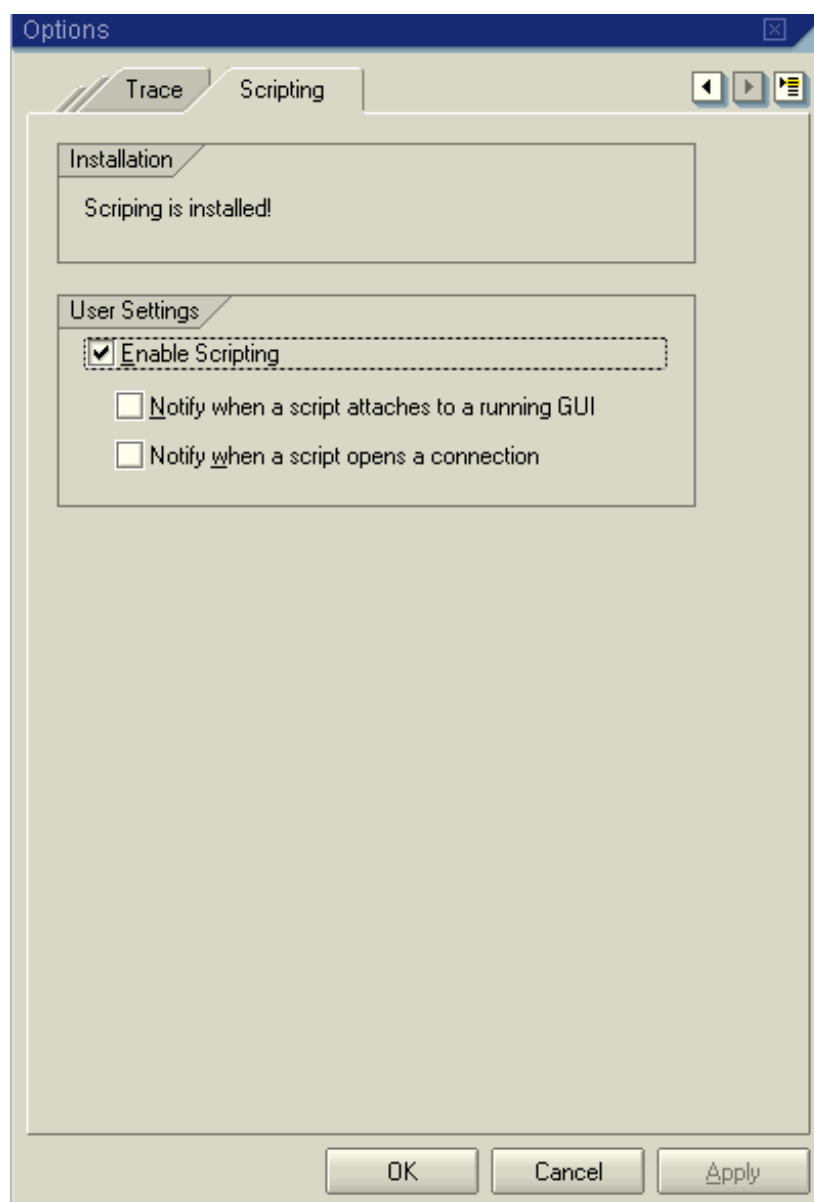
You must be running SAP GUI version 6.20 or above. To establish your SAP GUI version, run the SAP Logon Pad and choose 'About SAP Logon Pad' from the menu - as shown below.



You'll also have to make/check some settings in your SAP environment. The first is to ensure that scripting is enabled.

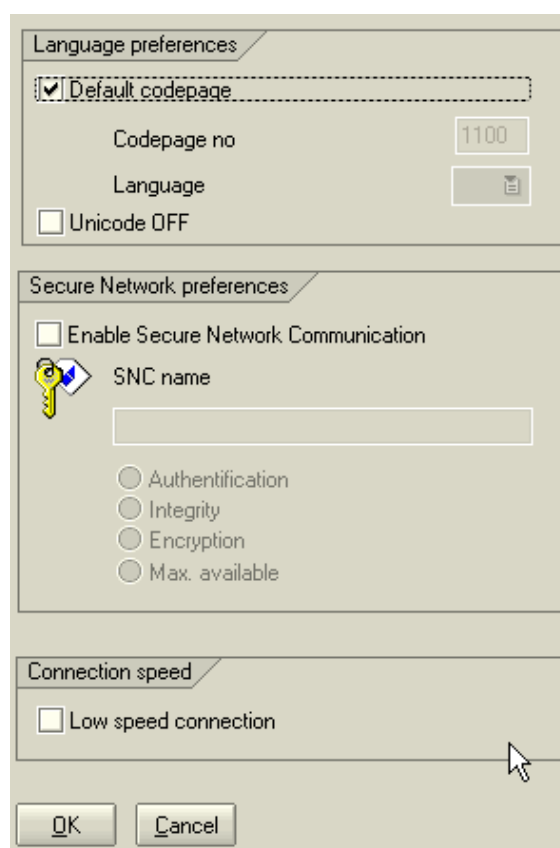
- Log on to your SAP system;
- Click the Customizing of local layout  SAP toolbar button and then choose Options.

- Click the Scripting tab. Your settings should be made as below.



You'll also need to ensure that your connection speed is not set to 'Low'. To do this:

- Open SAP Logon and select a server
- Click the 'Properties' button.
- Click the Advanced button. The Advanced Options dialog box opens.
- In the Connection speed section, confirm that the Low speed connection check box is cleared, as below:



A common SAP setting that prevents QuickDoc from running is scripting being disabled on the server. You may need to get your BASIS team to make this setting. To check if scripting is disabled, run transaction RZ11 and check the value of parameter `sapgui/user_scripting` - the 'Current value' field needs to be TRUE, as shown below.

Param. Name	sapgui/user_scripting	
Short description(Engl)	Enable or disable user scripting on the frontend.	
Appl. area	GUI Frontend	
ParameterTyp	Logical value	
Changes allowed	Change permitted	
Valid for oper. system	All operating systems	
DynamicallySwitchable	<input checked="" type="checkbox"/>	
Same on all servers	<input checked="" type="checkbox"/>	
Dflt value	TRUE	
ProfileVal	TRUE	
Current value	TRUE	

**NOTE:** If you change this value, you will need to logoff and logon again for the change to take effect.

If you're still having problems getting QuickDoc to work please see the 'Installation Guide' section where full details are given on how to make the necessary settings in SAP.

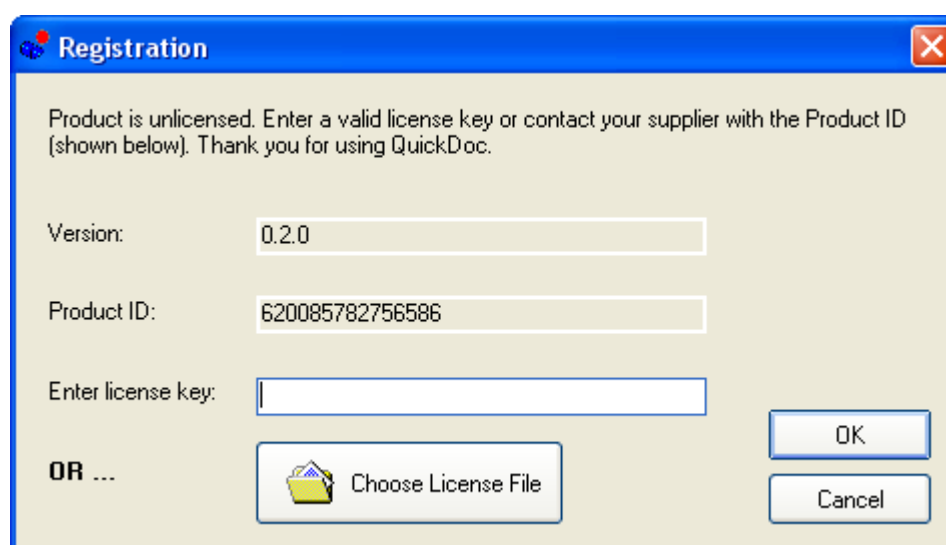
## Purchasing/Registering

The unlicensed version of this product is fully functional but limited to 14 days.

To purchase this product please contact your local distributor.

You will need to provide your Product ID and program Version – these can be found on the 'About' tab of the 'Preferences' window, or by following the steps to register on the pop-up reminder that appears when making a recording.

The registration screen is shown below and can be accessed either from the 'About' tab of the 'Preferences' window, or by following the steps to register on the pop-up reminder that appears when making a recording.



If you have been provided with a specific license key, you should enter it on this screen and register by clicking the 'OK' button.

Your company may have purchased multiple licenses, in which case, to simplify upgrades and to assist with product administration, you may not have been provided with a license key directly. Instead, your system administrator can be provided with a file containing all of the licenses purchased by your company (note that these licenses are still specific to the individual product installations, as indicated by the Product ID). If this is the case, then you should click the 'Choose License File' button and select the licence file provided – your system administrator will need to tell you the location of this file (usually a shared folder on a network drive).

Your system administrator will have been provided with more information on licensing and registration.

# Quick Start Guide

This Quick Start Guide is included to get you using QuickDoc as quickly as possible. The intuitive nature QuickDoc means that you are unlikely to require any further training.

Before starting your recording, ensure that:

- you have access to the SAP system in which you wish to run the transaction, along with appropriate authorisations;
- you are familiar with the transaction to be documented;
- you have all of the data necessary to run the transaction.


It is always a good idea to run the transaction(s) you intend to document a few times first so that you are sure of the steps that you wish to make and the data that will be required.

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## Making a Recording



It is important to note that *only fields that you type into will be recorded*. If a field value is defaulted by SAP it will *not* be recorded. To record a field that has been defaulted simply copy it (select and ctrl-c) and paste it (ctrl-v) back into the field.

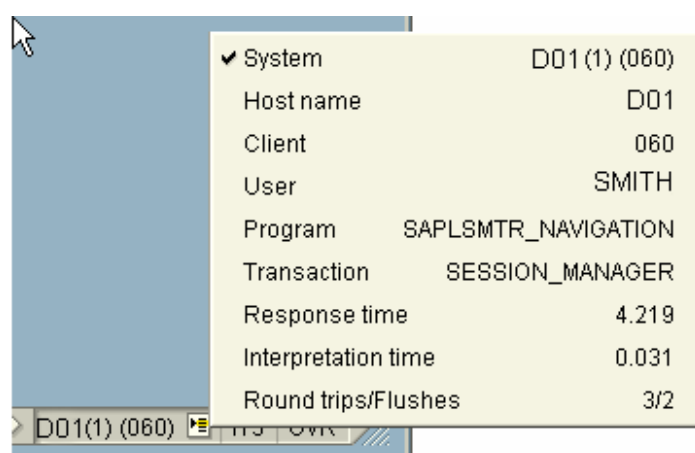
1. Run the SAP Logon Pad and logon to your SAP system.
2. Run Word.
3. Click the 'QuickDoc Record' button, .

If you have not registered a reminder screen will pop-up, click 'Continue Unregistered' to continue.

- The QuickDoc controls will then appear. Choose an SAP session to record, as below.




The description displayed in the session drop-down should be familiar to you as it is the same that you will see at the bottom of your SAP window:



If you have no open SAP sessions then the session list will be empty and a message asking you to start an SAP session will be displayed.

You will also receive a message if your SAP Logon Pad is not running.

- When you have chosen your SAP session click the record button, , on the recording control panel.


Your chosen SAP session window will be brought to the front, ready for you to record the transaction.

- Simply run the transaction you wish to document! Enter data as normal and do everything else as you normally would. There is nothing extra, or different, required – just run the transaction!



QuickDoc **only records the fields you type into!** Fields that are left blank, or are defaulted by SAP, will *not* be recorded.

**This is VERY important and crucial to your understanding and use of QuickDoc.** If you wish to record fields defaulted by SAP either over-type the data already there or cut-and-paste it back into the same field.

7. When you have run all the transactions you wish to document (QuickDoc is perfectly happy for you to record several transactions at a time), click the stop button, , on the recording control panel.

That's it. You've created your first QuickDoc document!

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## Tips and Tricks

You will have seen that QuickDoc is a very simple product to use. There are, however, several tips that can help you produce better documents.

- Spend time developing a document template and experimenting with the QuickDoc configuration settings until you have a document style that you everyone is happy with. Do this before working on specific documents as, if you require consistency, these will have to be re-worked. A few hours spent on this early in a project can save lots of effort and result in greatly improved document quality.
- Ensure that all team members have been distributed copies of the template, and the QuickDoc settings, and are using them.
- Always be familiar with the transactions that you are documenting. Think about the sequence of transactions and the data that you will use in them. It is usually a good idea to run through it once as a practice.
- When recording, make sure that the QuickDoc recording control panel is not on top of your SAP session – or it will be included in the screen captures! If it is, just drag it out of the way.
- Use your mouse to 'click' buttons rather than using key combinations. Key-strokes will be recorded as just that - key-strokes, only. Button-captures will *not* be included. Clicking the button ensures that the button-capture takes place and usually also includes the key-strokes as well. This is not always easy to remember for experienced SAP users and often results in missed captures.
- Don't forget! QuickDoc *only* records fields that you enter data into. Fields that are left blank, or are defaulted by SAP, will *not* be recorded. If you wish to record fields defaulted by SAP you *must* either over-type the data already there or cut-and-paste it back into the same field.

# Configuration Guide

QuickDoc is very easy to use and does not require any lengthy or complicated configuration. However, to get the most out of QuickDoc and to speed your documentation process, there are several features that can be customised to fit your own needs.

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## Document Layout

Firstly, and very importantly, QuickDoc does not force any document styles or templates upon you.

The QuickDoc toolbar is always available to you in Word, and SAP transactions can be recorded into any document. Fonts, header styles, margins etc. are all preserved - meaning that any existing template documents/styles that you have can be used without the need for any modifications.



QuickDoc always inserts the recorded documentation **at the end** of the document you are working on. This is to ensure that you can always easily find the text/pictures inserted by QuickDoc and to leave the overall layout and format of the document in the control of the author.


If you don't want the content at the end, simply cut-and-paste it to where you need it to be.

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Just like any other toolbar in Word, the QuickDoc toolbar can be hidden/made visible as you require.

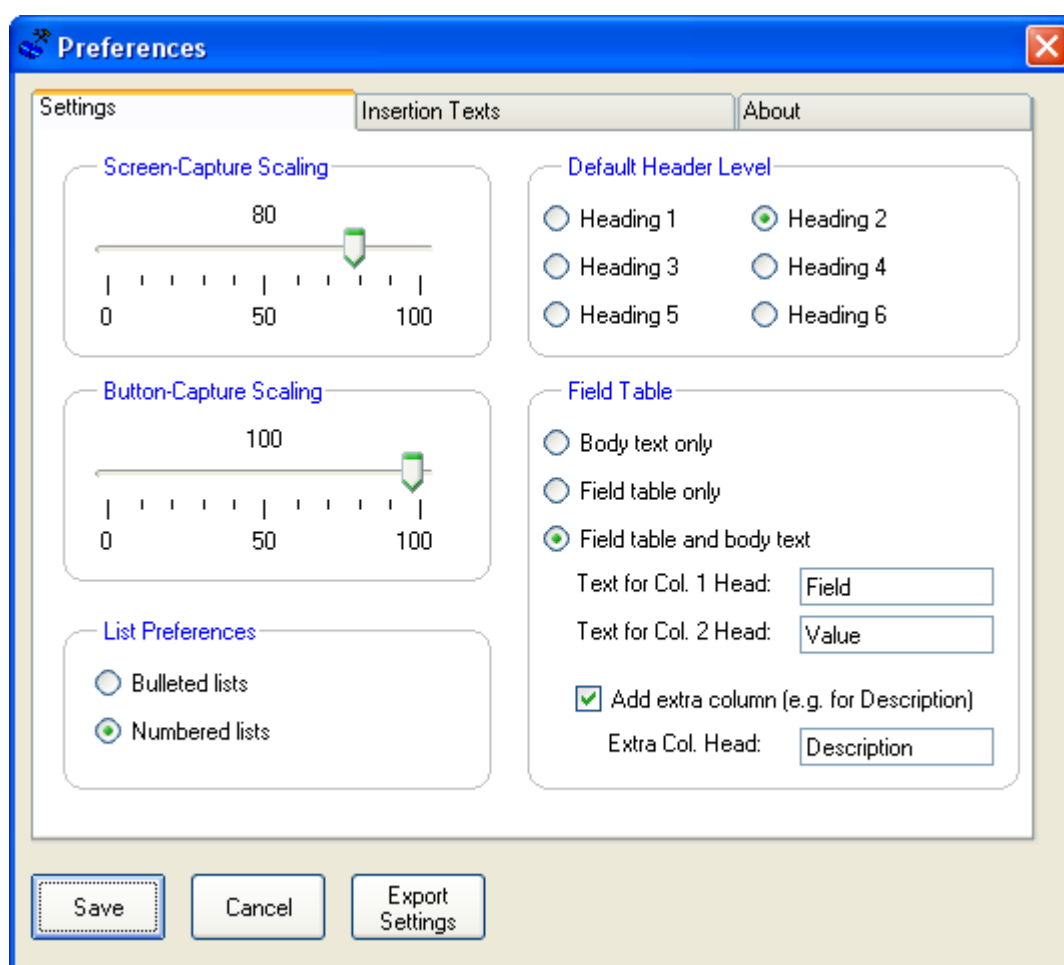
## Preferences

QuickDoc allows you to change several of its default behaviours to better fit in with your own documentation styling requirements.

To set your own preferences, click the preferences button on the QuickDoc toolbar,  Preferences.

The preferences window will then open.

## Settings



The 'Settings' tab allows you to select your preferences for:

- **Screen-Capture Scaling**  
Full-size screen captures use a lot of space in a document – typically one per page. Usually, it is not necessary to have the screen capture at full size and by reducing it (to 80%, say, which is the QuickDoc default) can allow more pictures per page and make your documents easier to read (and save paper).

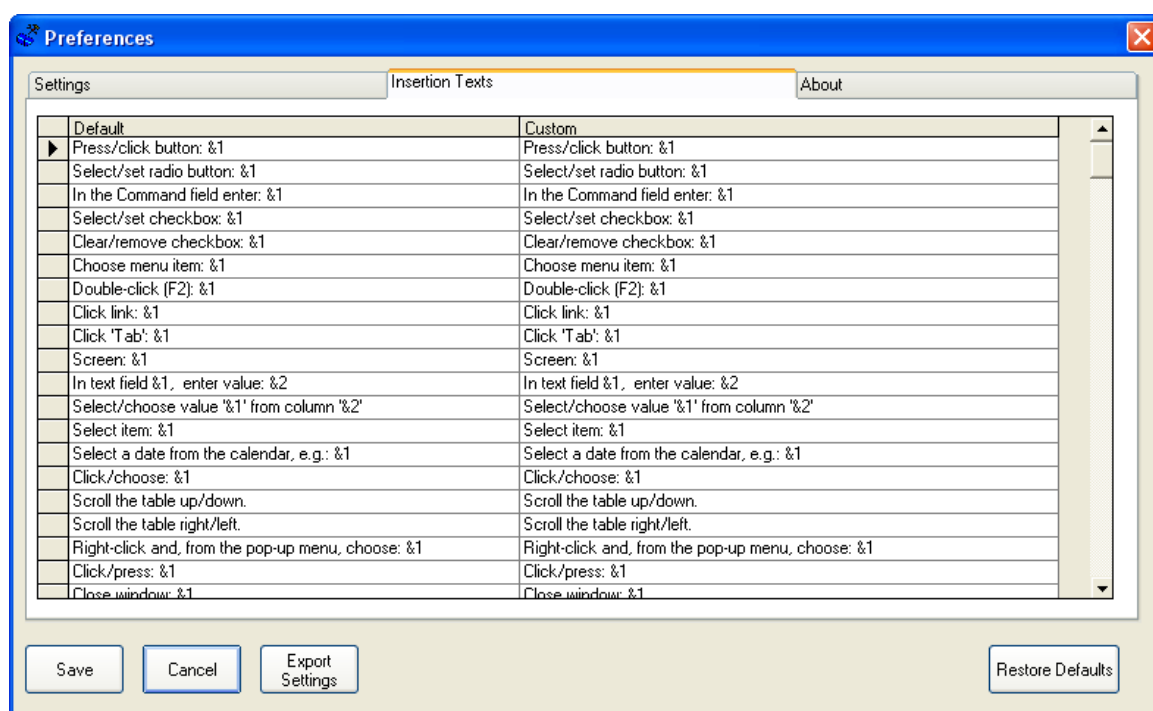
- **Button-Capture Scaling**  
Depending upon the size of font you are using, full-size button captures (whilst being clearer) and can make your documents look untidy. This slider allows you to set a size that you feel looks best in your documents.
- **List Preferences**  
Some people prefer bullets, others prefer numbers. In either case, the style from your own document template will be adopted.
- **Default Header Level**  
QuickDoc inserts a new heading before every screen that it captures. This setting allows you to choose which level of heading you would like QuickDoc to use. As with the list preference, the style of heading is adopted from your own document template.
- **Field Table**  
When you run QuickDoc you have a choice over how fields and their values are recorded into Word. You can have them included in the list of 'actions' following the screen-shot (body text), included as a table (field table) – or both.

When you first start using QuickDoc it is recommended that you choose the "Field table and body text" setting so that you become familiar with the differences – it also very easy to delete text you don't want.

If you choose to insert field tables, you can also set the titles of the columns that you would like to appear in the table.

Additionally, if you wish, you can also add an additional column to the table and specify its heading. This can be very useful if, for example, you want to add a description of the field and/or data. *QuickDoc does not enter anything into this column – it is left blank for you to enter your own comments.*

## Insertion Texts



When using QuickDoc you will have noticed that it inserts texts into your document in accordance with the activities you perform. For example, if you scroll a window the text “Scroll the table up/down.” will be added to your document. These texts can be configured to your own preference in ‘Insertion Texts’ tab.

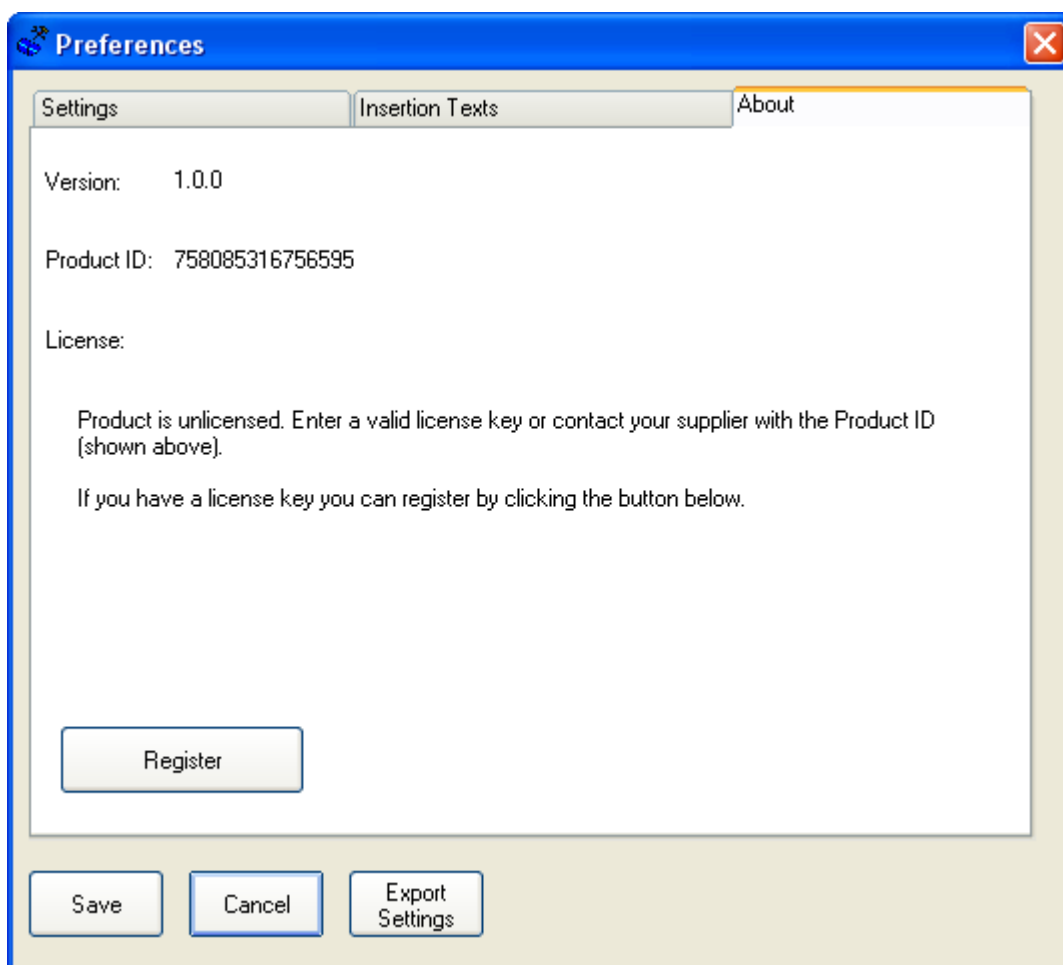
To alter the texts to your own liking, click the text in the right-hand ‘Custom’ column. Then type the text you wish to appear. The default text is always shown in the left-hand column for your reference.



Notice the “&1” and “&2”’s that appear in the texts? These represent the parameters that are passed to QuickDoc, from SAP, during the recording. For example, if you select a checkbox, the name of the checkbox selected must also be recorded.

Be very careful to ensure that any changes you make to custom texts include the same & parameters that are shown in the default texts.

## About



The 'About' tab shows the program version, your unique product ID and the current registration status. If your product is registered the license key will also be show.

If your product is unregistered, and you have been provided with a license key, you can enter it by clicking the 'Register' button and following the prompts. See also 'Purchasing/Registering'.

## Export/Import Settings

The “Export Settings” button is visible from all of the Preferences tabs. Clicking this button will allow you to save all of your preferences (screen scaling, bullet style etc., along with any custom Insertion Texts).

These settings are saved in the Windows Registry file format and can be shared with other members of your project team and/or colleagues. Simply email them the file or place a copy in a shared folder on a network drive.

By sharing your settings you can ensure that all documentation produced adheres to the same conventions.

To import the settings from the saved registry file, simply double-click the file and follow the prompts.

# Installation Guide

QuickDoc is based on SAP's Scripting API. This API has only been available since SAP GUI 6.2 and is disabled by default. Note that it is the version of SAP GUI that is important, not the version of SAP.

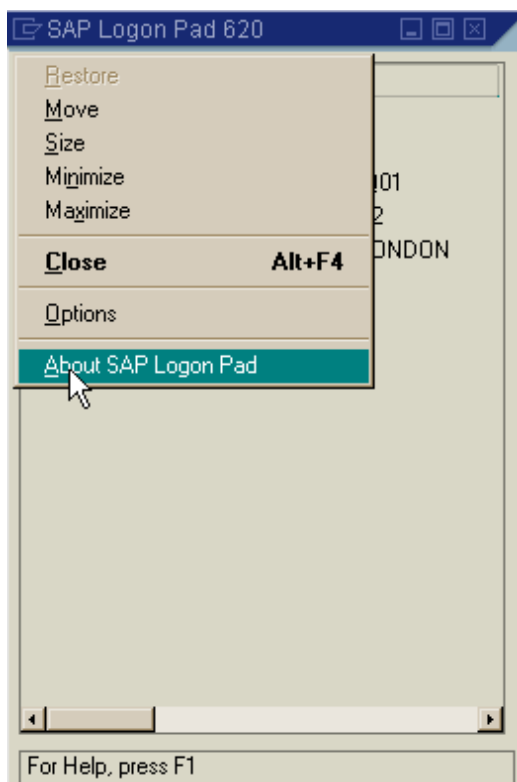
Establishing a suitable environment requires the following:

- ensuring a suitable version of SAP GUI is installed;
- ensuring SAP GUI Scripting is installed;
- ensuring scripting is enabled on the server(s);
- ensuring scripting is enabled on the clients;
- ensuring your client is configured to use the Dialog display mode for Help;
- ensuring your client is not set to use a Low speed connection.

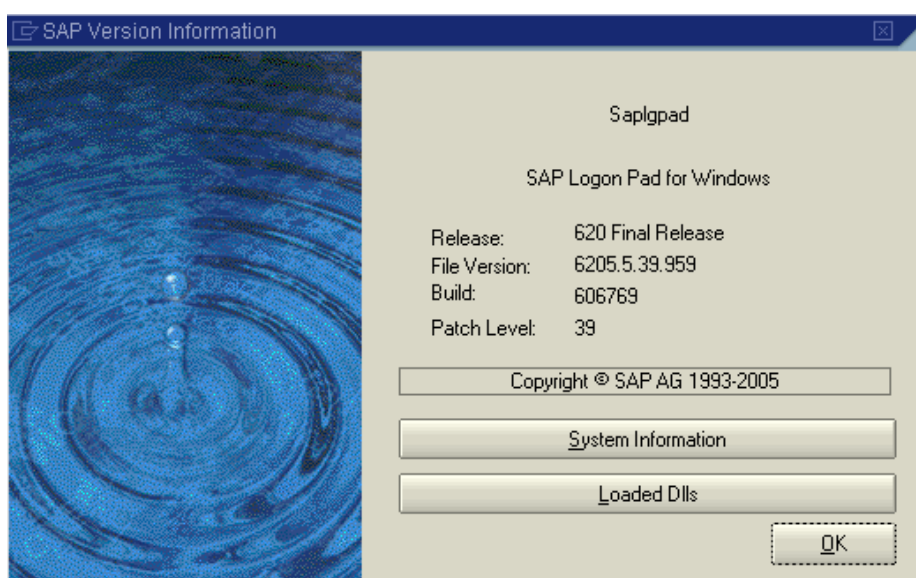
## Checking SAP GUI Version

To check the version of your SAP Windows client:

Open the SAP Logon dialog box and click the button on the left side of window's title bar, as below. Choose 'About SAP Logon'



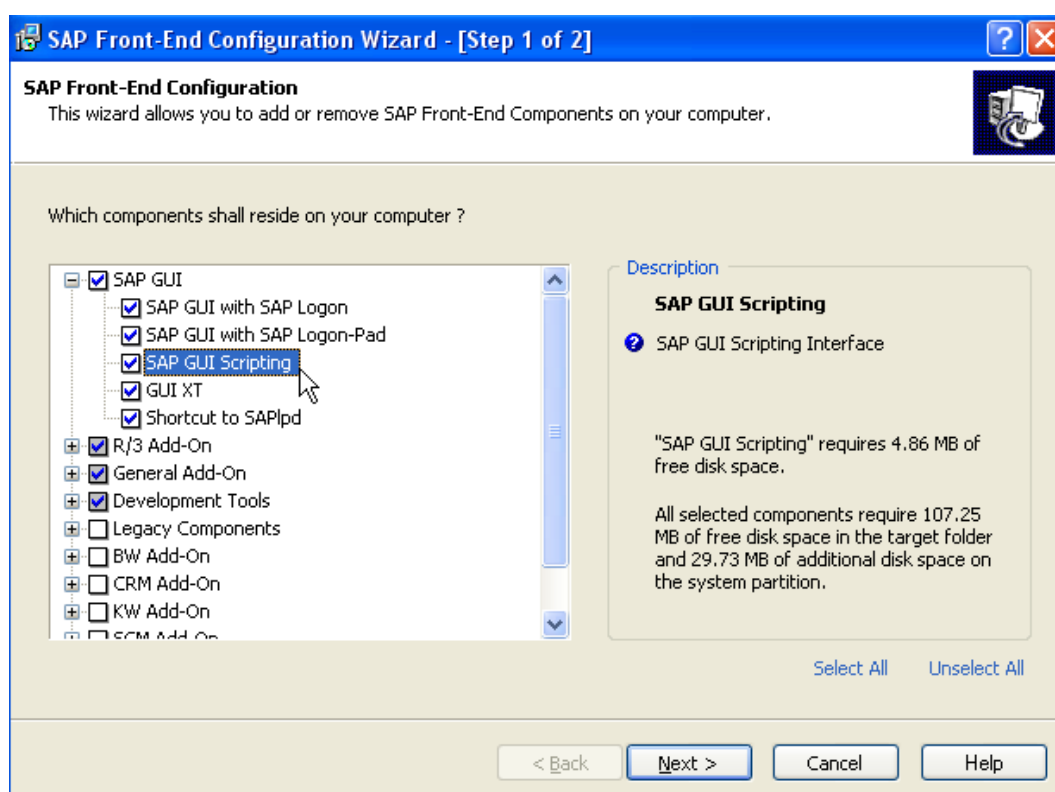
The 'SAP Version Information' is shown. Confirm that the version is at least 620. If it is 620 (not above) then also confirm that the Patch Level is at least 36.



## Installing SAP GUI Scripting

SAP GUI Scripting needs to be installed at the same time as SAP GUI, and this is usually the case for most installations. It is unlikely that you will need to do this but if you are experiencing difficulties (if QuickDoc is unable to detect open sessions, for example) then re-installing SAP GUI and confirming this setting is suggested as a likely cure.

During SAP GUI installation you must select the SAP GUI Scripting installation option, as below.



Correct installation of SAP GUI and SAP GUI Scripting is a pre-requisite for all the other installation activities described.

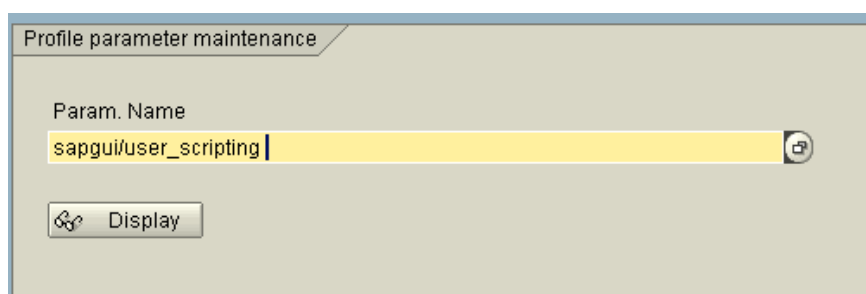
## Enabling Scripting on the SAP Application Server

By default, scripting is disabled, so it is very likely that you will need to perform this activity.

To enable scripting, you need to set the profile for `sapgui/user_scripting` to `TRUE` on the application server.

To change the value of this profile parameter, follow the steps below.

1. Run transaction RZ11.
2. Enter parameter name `sapgui/user_scripting`, as below.



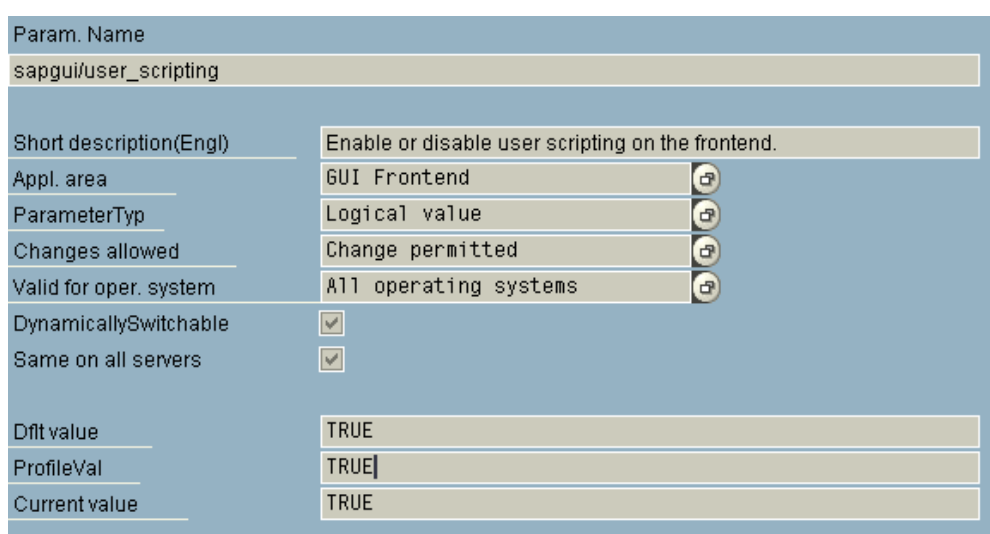
Profile parameter maintenance

Param. Name

3. Click the Display button.

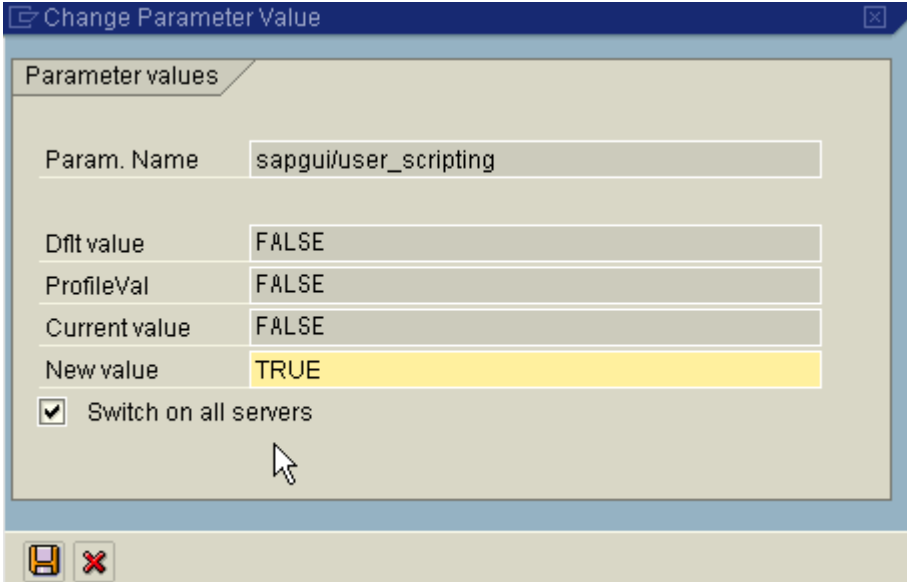
Note: If the message 'Parameter name is unknown' is displayed in the status bar, then you do not have the required support package level installed. Check OSS for updates.

4. The profile value must be set to `TRUE`, as below.



Param. Name	sapgui/user_scripting
Short description(Engl)	Enable or disable user scripting on the frontend.
Appl. area	GUI Frontend
ParameterTyp	Logical value
Changes allowed	Change permitted
Valid for oper. system	All operating systems
DynamicallySwitchable	<input checked="" type="checkbox"/>
Same on all servers	<input checked="" type="checkbox"/>
Diff value	TRUE
ProfileVal	TRUE
Current value	TRUE

5. If the profile value is not set to TRUE, then it must be changed. Click the 'Change value' button in the toolbar.
6. Enter TRUE in the ProfileVal box and click the Save button. You *must* enter TRUE in capital letters – lower or mixed case will **not** work.



The screenshot shows a window titled "Change Parameter Value" with a close button in the top right corner. The main area is titled "Parameter values" and contains a table with the following data:

Param. Name	sapgui/user_scripting
Dflt value	FALSE
ProfileVal	FALSE
Current value	FALSE
New value	TRUE

Below the table, there is a checked checkbox labeled "Switch on all servers". At the bottom of the dialog, there is a toolbar with a save icon (floppy disk) and a close icon (red X).

Note also the 'Switch on all servers' check-box. To enable scripting for all users, this parameter must be set on all application servers so this must be selected. If you wish to enable scripting only for a specific group of users, then only set the parameter on application servers with the appropriate access restrictions.

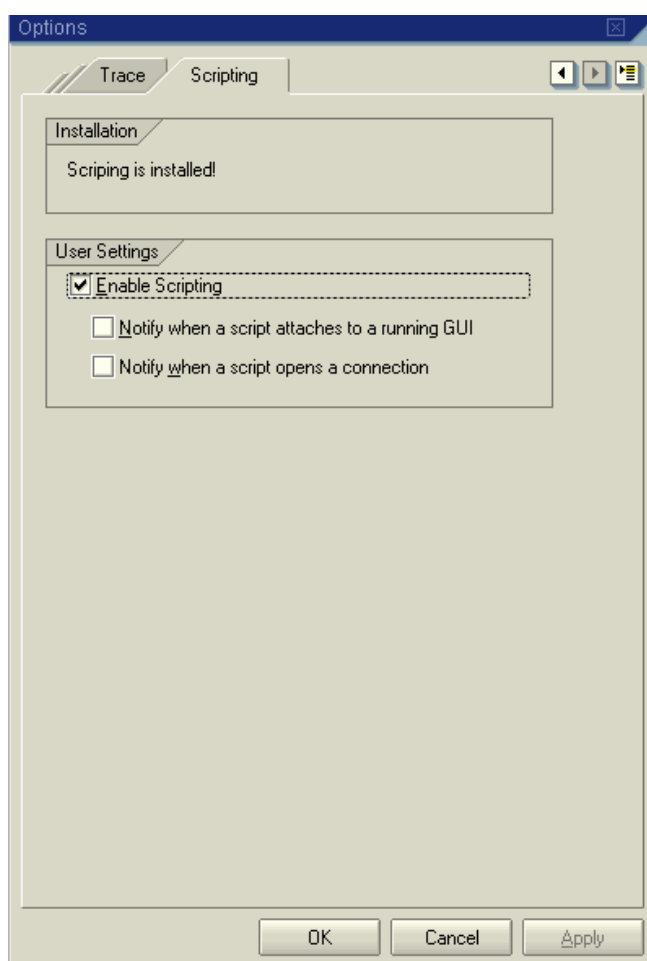
7. After saving the changes, the value is displayed as TRUE. However, this change takes effect only when you log in to the system, therefore, you must log out and log on again.

Note: If the settings do not seem to be taking effect, you may not have the required support package level installed. Check OSS for updates.

## Enabling Scripting on the SAP Application Client

To enable scripting on SAP GUI:

1. Log on to an SAP server;
2. Click the Customizing of local layout  SAP toolbar button and then choose Options.
3. Click the Scripting tab.



4. Confirm that the Enable Scripting check box is selected. If not, select it.
5. Clear both the 'Notify when a script attaches to a running GUI' and 'Notify when a script opens a connection' check boxes.

## Setting F4 Help to Use Dialog Display Mode

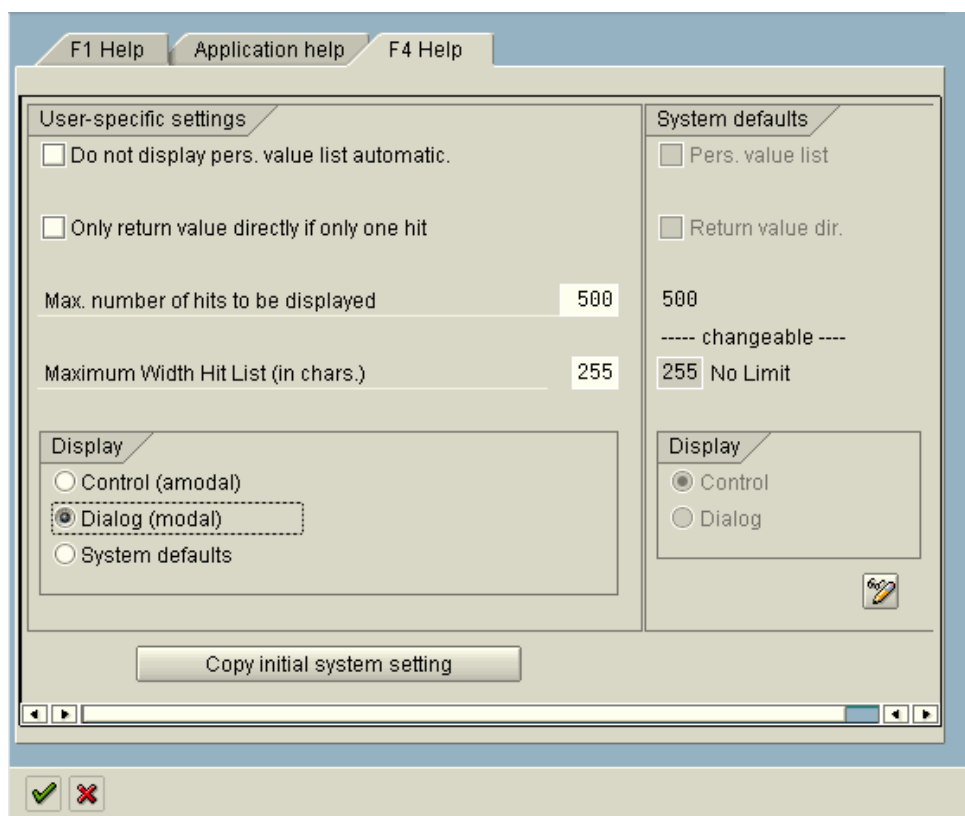
This is an optional setting and only needs to be made if you intend to include the recording of F4 help in your recordings. Most users do not do this.


When the SAP GUI uses the SAP Scripting API, it cannot load the F4 Help screens in Control mode. Therefore, you should ensure that your client is set to load F4 Help screens in Dialog mode.

To do this:

Log on to an SAP server

1. Choose Help > Settings from the SAP menu bar.
2. Click the 'F4 Help' tab.



3. If the 'System defaults' section for 'Display' (on the right, above), indicate 'Dialog' then you can choose 'System defaults' on the left, user-specific, setting. If not, you must choose 'Dialog (modal)' for the user specific setting – as shown above.
4. Click  to save your settings.

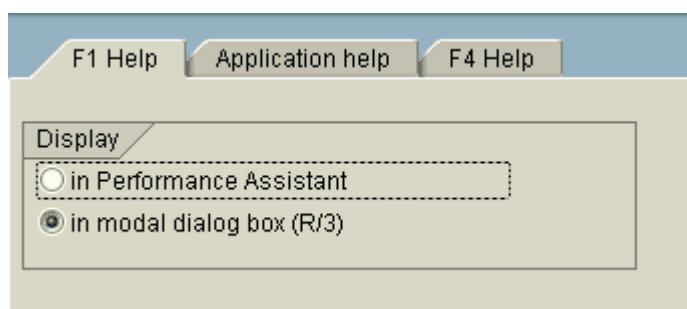
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## Setting F1 Help to Use Modal Dialog Box Mode

As with F4 Help, F1 Help can also be set to Modal - as with F4 help this is optional and only needs to be done if you intend to include recording of help key presses in your scripts.

To do this:

1. Log on to an SAP server
2. Choose Help > Settings from the SAP menu bar and Click the 'F1 Help' tab.



3. Select 'in modal dialog box (R/3)'.  
4. Click  to save your settings.

## Checking the Connection Speed

If you use the Low speed connection option, SAP does not send enough information to QuickDoc for it properly record and run scripts. You must check that this option is not selected.

To do this:

1. Open SAP Logon and select a server
2. Click the 'Properties' button.
3. Click the Advanced button. The Advanced Options dialog box opens.
4. In the Connection speed section, confirm that the Low speed connection check box is cleared, as below:

