

Customizing VisualSPTM Help System

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Introduction

VisualSPTM can be customized to fit Your specific needs! The product ships with many assets (videos, image tip sheets and help documents) that are ready to be used right away. You can also expose your own content from an in-house or online location to deliver help to the users when and where they need it! Visit <u>http://www.visualsp.com</u> for more information and to get an evaluation version of the system.

Check out the latest platform updates at the VisualSPTM video demos showcase

Exposing Help content farm-wide

Reference video tutorial:

http://sharepoint-videos.com/products/visualsp/visualsp-video-showcase/#ConfigureHelp

By default, Help content is controlled throughout the farm from the top level site of one site collection that has been designated as the **VisualSP Farm Hub**. To add new Help content, navigate to that site then Site Actions \rightarrow Site Settings. Click on **Manage VisualSP Help Items.**

SharePoint		Newsfeed SkyDrive Sites Asif Rehmani 🗸 🔅
BROWSE HELP		🕄 SHARE 🛣 FOLLOW
	Recycle bin Search Result Sources Search Result Types	Popularity Trends
	Search Query Rules Search Schema	Result Sources
	Search Settings	Result Types
	Search Configuration Import	Query Rules
	Search Configuration Export	Schema
	Site collection features	Search Settings
	Site hierarchy	Search and offline availability
	Site collection audit settings	Configuration Import
	Audit log reports	Configuration Export
	Contant Turne Bolicy Templater	
	Storage Metrics	
	Site collection app permissions	
	Site Policies	
	Popularity and Search Reports	
	Content type publishing	
	HTML Field Security	
	Help settings	
	SharePoint Designer Settings	
	Site collection health checks	
	site collection upgrade	
	VisualSP Settings	
	Manage VisualSP Help Provider Settings	
	Manage VisualSP Help Items	

Here you can edit existing Help items or create new ones. Editing an item simply means clicking on it and changing its properties.



SharePoint					News	feed SkyDrive Site	s Asif Rehmani 👻 🐯
BROWSE MANAGE HELP ITEMS							🖓 SHARE 🔗 FOLLOW
kidd Help View Edit Rename Kanage	Delete All Versi Delete Locale V Copy Item 👙	ons rersion Export Help Import H Items Export/Import	elp All E Items Gri Views	By oup			
Home							
Documents Recent							Locale: Default
Contacts	✓ Icon	Title	Group	Size	Viewer	Scope	Permissions
Announcements	4	Adding users to a site	Site Settings videos	Medium	Silverlight	Site Settings Page	
SharePoint-Videos To Do List	P	Announcement info doc	Help documents	Medium	Document	Announcement List	
Site Contents	P	Calendar info doc	Help documents	Medium	Document	Events (Calendar) List	t
EDIT LINKS	1	Changing look and feel of the site	Site Settings videos	Medium	Silverlight	Site Settings Page	
	La.	Checking in a document	Library videos	Medium	Silverlight	Document Library	
	-2	Checking out a document	Library videos	Medium	Silverlight	Document Library	

The below image shows the **Creating a list item** Help item as it exists by default. All of the properties can be changed as needed.

elp Item	
	Locale ID
	Default 🔽
	Help Item Details - Default
	Group
	Existing Group: <new></new>
	New Group:
	Title
	Description
	Link
	Browce
	Ear avample "http://company.com/ContentLiub/SiteAcrete/1022A(ideos/10101/10101 mp/"
	rorexample, http://company.com/content/ub/sitexssets/1035/videos/10101/10101.mp4 .
	Show In New Window
	☐ If checked then the content will be displayed in a new window. Otherwise, a dialog will be used
	to display the content.
	Viewer / Media Type
	Silverlight Video Player



Icon URL			
Specify the URL of the icon. Because the help item may be displayed in different web applications it is recommended that you use an absolute URL and not a relative URL (where applicable).	Icon URL Existing Icon URL: < Or, Custom Icon URL:	custom>	Browse
	For example, "http://com	npany.com/sites/ContentHub/SiteAssets/Icons/che	eckin.png".
Icon Size Specify the size of the icon.	Icon Size Large icon with label		
Scope Specify what list types or settings pages to associate the help item with.	Scope Tasks List Announcement List Document Library Publishing Pages Librar Publishing Page Wiki Page Library Wiki Page Discussion Board Events (Calendar) List Issue Tracking List Survey List	Contacts List Links List Custom List Custom Library Blog Posts List Blog Post Categories List Blog Post Comments List External List Site Settings Page Library Settings Page List Settings Page	
	Custom Scopes		

Separate multiple custom scope values with a comma. Custom scope values are used by the VisualSP Web Part.

Permissions

Specify what permissions the user must have to the associated scope for the help item to show. The user must have all the permissions identified for the given category in order for the item to display.

List of Library Permissions						
List or Library Permissions are only relevant when any scope other than the Site, List, or Library Settings Page scopes are selected.						
Always show help item						
🗹 Add and Customize Pages 📝 Delete Versions						
Add List Items Approve Items						
✓ Edit List Items ✓ Cancel Checkout						
✓ Delete List Items ✓ Create Alerts						
List or Library Settings Permissions						
cise of clorery settings remissions						

List or Library Settings Permissions are only relevant when the "List Settings Page" scope or the "Library Settings Page" scope is selected.

☑ Always show help item

- List and there a provinciant

🗹 Manage Alerts 🗹 Manage Permissions

Site Settings Permissions

Site Settings Permissions are only relevant when the "Site Settings Page" scope is selected.



Site Settings Per selected.	missions are onl	y relevant when the "Site s	Settings Page" so	cope is
Always show	help item			
Apply Styl	e Sheets me And Border	Manage Permissions		
Create Gro	oups	Manage Web		
✓ Manage A ✓ Manage Li	lerts ists	🗹 View Usage Data		
			OK	Cancel

Once you make the necessary changes, click the **OK** button to save.

Creating new Help items is also just as simple. Click the **Add Help Item** link on the Manage VisualSP Help Items page and you will be presented with the same screen as in the above image, but it will let you start from scratch.

Adding a custom image as a Help item

Reference video tutorial:

http://sharepoint-videos.com/products/visualsp/visualsp-video-showcase/#AddingImage

Any custom image/screenshot/tip sheet can be added as a Help item in the system. The image can be of any type (.jpg, .gif, .png etc.). It can be targeted contextually to show up with certain scopes. You can also apply security trimming to only show the image to appropriate users.

Start by uploading the image to the Site Assets library in the VisualSP Farm Hub site collection.

Note: The image can be added at any other location as well. However, it is recommended as a best practice to keep all Help content in the same location for easy management.

BROWSE HELP FILES	LIBRARY						¢
5	Intranet Learning Human Resou Site Assets ①	urces 🖌 EDIT LINKS					Se
Home	new document or drag file	es here					
Documents	All Documents ···· Find a file	Q					
Salespeople Team Calendar Announcements	✓ ☐ Name Modified Modified B There are no files in the view "All D	E D B = File Home Share	Library To View Manag	e Manage	I	Pictures	
custom list		🕞 💿 = 🕆 🔳 🛛 Li	braries + Pictures			v 🖒 Search Picto	ures
Links Community Home		Favorites	AWC_jersey_male _large.gif	Bike_shoes_large. gif	Capitol.jpg	chain_lube_large. gif	hotr
Categories	to Site Assets library	Recent places SharePoint			N		5
Recent and grab	its URL	Libraries Documents Music Pictures	hotrodbike_blue_ small.gif	National_Football _League_2008_sv g.png	saddle_large.gif	Salespeople.png	shor
asks Site Contents		Videos					



Once the image is in a repository available to SharePoint, you will now need to create a new Help item pointing to that image.

Navigate to VisualSP Farm Hub \rightarrow Site Actions \rightarrow Site Settings \rightarrow Manage VisualSP Help Items.

Click **Add Help Item** button in the ribbon.

At the Manage VisualSP Help Item page, fill in the Help item info as needed. Be sure to pick the **Image** selection for Viewer / Media Type as shown in image below.

	Group	$\cdots \rightarrow \infty = (1 + 1) + (1 + 1$
	Existing Group: Help documents	✓
	New Group:	
}	Title	
	Managing Salespeople	
{		
1	Description	
	Process to manage salespeople list	
4		1
[
	Link	
	http://c4968397007/SiteAssets/Salespeople.png	
}	For example, "http://company.com/ContentHub/Site/	ssets/1033/Videos/10101/10101.mp4".
2	Show In New Window	
	If checked then the content will be displayed in a	new window. Otherwise, a dialog will be used to display the content.
l,	Viewer / Media Type	1
	Silverlight Video Player	
}	HTML 5 Video Player	
}	FLV Video Player Flash Player	1
Icon URL	Document (.pdf, .docx, .xlxs, etc.)	
Specify the URL of the icon. Because the help item may	Quicktime Video Player	
be displayed in different web applications it is recommended that you use an absolute URL and not a	Elmage (.png, .jpg, .bmp, etc.)	
relative URL (where applicable).	Custom EMBED or OBJECT Tag	
(Web Page	
	For example, "http://company.com/sites/ContentHub/	SiteAssets/Icons/checkin.png".

Move down the page to pick the appropriate icon (or supply your own) and then the scope(s) at which you would like to see this custom image appear.

Icon Size Specify the size of the icon.	Icon Size Small icon with label	
Scope Specify what list types or settings pages to associate	Scope	
the help item with.	Tasks List	□ Survey List
	Announcement List	Contacts List
	Document Library	Links List
	Publishing Pages Librar	y 🗌 Custom List
	Publishing Page	Forms Library
Disk the enversion econe	Wiki Page Library	External List
Pick the appropriate scope	🗌 Wiki Page	Site Settings Page
where the Help Item should be	Discussion Board	Library Settings Page
displayed	Events (Calendar) List	List Settings Page
	Issue Tracking List	
	Custom Scopes	



Below the Scope section, you will also find the Permissions section. Use the settings in that section as needed to specify what permission rights are needed by the user to be able to see this Help item.

Click **OK** at the bottom of the page to save this new Help item which points to your custom image.

The Help item should now be visible at the appropriate location.

SharePoint								New	vsfeed	SkyD
BROWSE HELP ITE	MS LIST									
List quick reference Managing Salespeople Help documents	Creating a Contacts list Creating a list Item Deleting items from a lis	Editing an item in a list	Connecting Contact Export list data to E S.COM Trainin	s list to Out Koel g: Man	aging Sales	people		c	- ×	1
It now appe Help docum	ars in the nents group	SharePoint Biowel Hele Mines List Some	Intranet Learning Salespeopl (•) new item or edit	Human Resour e this list	ces 🖌 EDIT LINKS	Approved	Salespeople list	Newsteed SkyDr		
custom list		Documents Salespeople Team Calendar	All contacts Map ····	Find an item	Company	Business Phone Home Phone	Email Address	Location	ŝ	I
Links Community		Announcements custom list Links	Bennett 12 - Blonder Radelet 11	•• Kari •• Mike ••• Sarah	SAP SharePoint-Videos.com PeopleSoft	444-287-2822 333-272-9382 555-273-4722	kari@sap.com mike@dharepointelearning.com sarah@peoplesoft.com	ŧ	į.	I
Home Categories Members		Community Home Categories Members	Rehmani .	Asif	Microsoft	888-763-8274	asif@microsoft.com	đ	Ĩ	I
About Recent		About	used your g		gel-all & general	n e d ^{an} d ^a una	man from	EÎPon	Out	
contacts tasks				_						J

Adding a custom video as a Help item

Reference video tutorials:

http://sharepoint-videos.com/products/visualsp/visualsp-video-showcase/#AddingVideo http://sharepoint-videos.com/products/visualsp/visualsp-video-showcase/#YouTube

Add a custom video as a Help item to any context in the ribbon. The video can be of any type (flash, .mp4, .avi etc). It can be targeted contextually to show up with certain scopes. You can also apply security trimming to only show the image to appropriate users.

Start by uploading the video to the Site Assets library in the VisualSP Farm Hub site collection.

Note: The video can be added at any other location as well. However, it is recommended as a best practice to keep all Help content in the same location for easy management.



SharePoint	
BROWSE HELP FILES LIBRARY	
Site Assets (1)	urces 💉 EDIT LINKS
Home 🔶 new document or drag fil	es here
Documents All Documents ···· Find a file	٩
Salespeople	
Team Calendar	Library Tools Video Tools
Announcements Satespeople w	File Home Share View Manage Play
custom list	€ () ▼ ↑ H + Libraries → Videos
Links	🛠 Favorites
Upload the new video to	Desktop
	Recent places
Members	SharePoint AddSalespeople.
About	mp4
Recent	Documents
contacts	Music Fictures

Once the video is in a repository available to SharePoint, you will now need to create a new Help item pointing to that video.

Navigate to VisualSP Farm Hub \rightarrow Site Actions \rightarrow Site Settings \rightarrow Manage VisualSP Help Items.

Click Add Help Item button in the ribbon.

At the Manage VisualSP Help Item page, fill in the Help item info as needed. Be sure to pick the appropriate video selection for Viewer / Media Type as shown in image below.

yn a gwenne yn gwenne e 1999 a llefer a wrae yn er fernell yn de refer yn de regy yn ar yn ar yn ar yn ar yn a Yn ar yn a	Title
	Adding a salesperson
	Description
	Process to add a salesperson
	Link
	http://c4968397007/SiteAssets/AddSalespeople.mp4
Pick the appropriate type of video player for your custom video Icon URL Specify the URL of the icon. Because the help item may be displayed in different web applications it is recommended that you use an absolute URL and not a relative URL (where applicable).	For example, "http://company.com/ContentHub/siteAssets/1033/videos/10101/10101.mp4". Show In New Window If checked then the content will be displayed in a new window. Otherwise, a dialog will be used to display the content. Viewer / Media Type Silverlight Video Player HTML 5 Video Player FLV Video Player FLV Video Player Poucktime Video Player Image (.pngjpgbmp, etc.) YouTube Video YouTube Video Web Page
and allow and allow and allow	For example, "http://company.com/sites/ContentHub/SiteAssets/Icons/checkin.png".



Move down the page to pick the appropriate icon (or supply your own) and then the scope(s) at which you would like to see this custom video appear.



Below the Scope section, you will also find the Permissions section. Use the settings in that section as needed to specify what permission rights are needed by the user to be able to see this Help item.

Click **OK** at the bottom of the page to save this new Help item which points to your custom video.

The Help item should now be visible at the appropriate location.

SharePoint									0	Newsfeed SkyDrive	Sites
BROWSE HELP IT	'EMS LIST	1									
List quick reference Managing Salespeople	Creating	g a Contacts g a list Item g items from	list 📝 Editing a	an item i	n a list 🕂 C K E A C	Connecting Contacts list to Outlo Export list data to Excel Open list data with Access	ok [Adding a s	salesperson	The new v appears Salespeople	video now s in the contacts list	
Help documents			List videos			Office integration videos	Salespe	ople			
Home		🕀 ne	ew item or e	dit th	nis list		Adding a s	a lesperson o add a salesp	erson		
Documents		All cont	acts Map •		Find an item	Q					1
Salespeople			a.		-27-2722		2 12 22	107 - 21			
Team Calendar		~	U Last Name		First Name	Company	Business Phone	Home Phone	Email Address	Location	
Announcements			Bennett 🗱		Kari	SAP	444-287-2822		kari@sap.com		
austom list			Blonder		Mike	SharePoint-Videos.com	333-272-9382		mike@sharepointelearning.com	()	
custom list					Court	Decels C=A	FFF 070 4700				
Links			Radelet 🗱		Saran	Реоріезоп	555-2/3-4/22		saran@peoplesoft.com		
Community			Rehmani		Asif	Microsoft	888-763-8274		asif@microsoft.com	6	
Home			Smith 🛱		Tim	Avanade	745-383-4922		tim@avanade.com		
Categories			0.200			and the second					

Enabling the Help tab in a Site Collection

Reference video tutorial:

http://sharepoint-videos.com/products/visualsp/visualsp-video-showcase/#ToggleHelpTab



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All site collections by default inherit Help content from the farm-wide settings. In case a site collection is not showing the Help tab, it means that it is not set as a 'consumer' of the Help items.

To enable a site collection to consume Help items, a site collection administrator must ensure to activate the **VisualSP Consumer Site Collection Feature** as shown in the following image:



Exposing specific content at a Site Collection

All site collections by default inherit the content from the farm-wide settings. However, a site collection administrator can decide to show content specific to her users' needs.

The site collection administrator must first activate the **VisualSP Provider site collection feature** to be able to administer the Help content at the site collection level.

SharePoint-Videos VisualSP Help Provider Feature	Deactivate Acti	ve

Then the Site Settings page will show the **VisualSP Settings** which will let the site collection administrator manage the Help items at the site collection level.

VisualSP Settings Manage VisualSP Help Provider Settings Manage VisualSP Help Items

Manage VisualSP Help Provider Settings

The site collection administrator can decide to inherit Help items from the Farm Hub or not. If not inheriting, you can still decide to copy the items from the Farm Hub initially and then build on top of that 10



Inherit Help Items Specify whether you would like the ribbon to show help items from the parent help provider hub.	Copy Items
--	------------

Manage VisualSP Help Items

This page looks and behaves exactly like the one at the Farm Hub level. New items can be added and existing items can be edited to show at the site collection level.

If the site collection administrator decided <u>to copy</u> the Help items from the Farm Hub, it will be initially filled with Farm level Help items.

If the site collection administrator decided <u>to not copy</u> the Help items from the Farm Hub, it will initially be empty to start with.

Once the new Help items are added, they will show up at the specified context. For example, the following image shows how the **Calendar** list Help items would look that are specific to an **HR process** specified by a site collection administrator.

SharePoint							
	BROWSE	HELP	EVENTS CALENDAR				
W	HR Manua	1					
ł	Vacation request process						
	HR Pr	ocess					
4 2013			Þ	(A) (A) May 2013			
	Jan	Feb		Mar		() () IMay 2015	2015
	Apr	May		Jun		SUNDAY	MONDAY
	Jul	Aug		Sep		28	29
	Oct	Nov		Dec			
	Today is Monday, May 27, 2013						
Calendars in View						5	6
	Team Calendar						
	and an and the second						