



Customizing VisualSP™ Help System

Contents

Introduction	2
Exposing Help content farm-wide	2
Adding a custom image as a Help item.....	5
Adding a custom video as a Help item	7
Enabling the Help tab in a Site Collection	9
Exposing specific content at a Site Collection.....	10

Introduction

VisualSP™ 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 <http://www.visualsp.com> for more information and to get an evaluation version of the system.

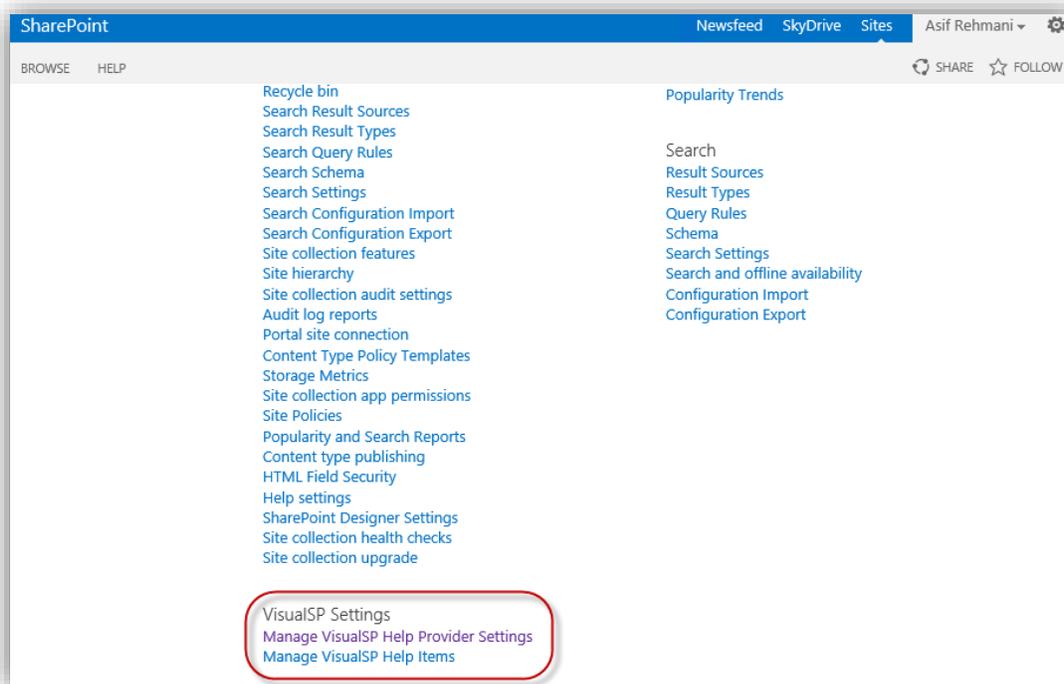
[Check out the latest platform updates at the VisualSP™ video demos showcase](#)

Exposing Help content farm-wide

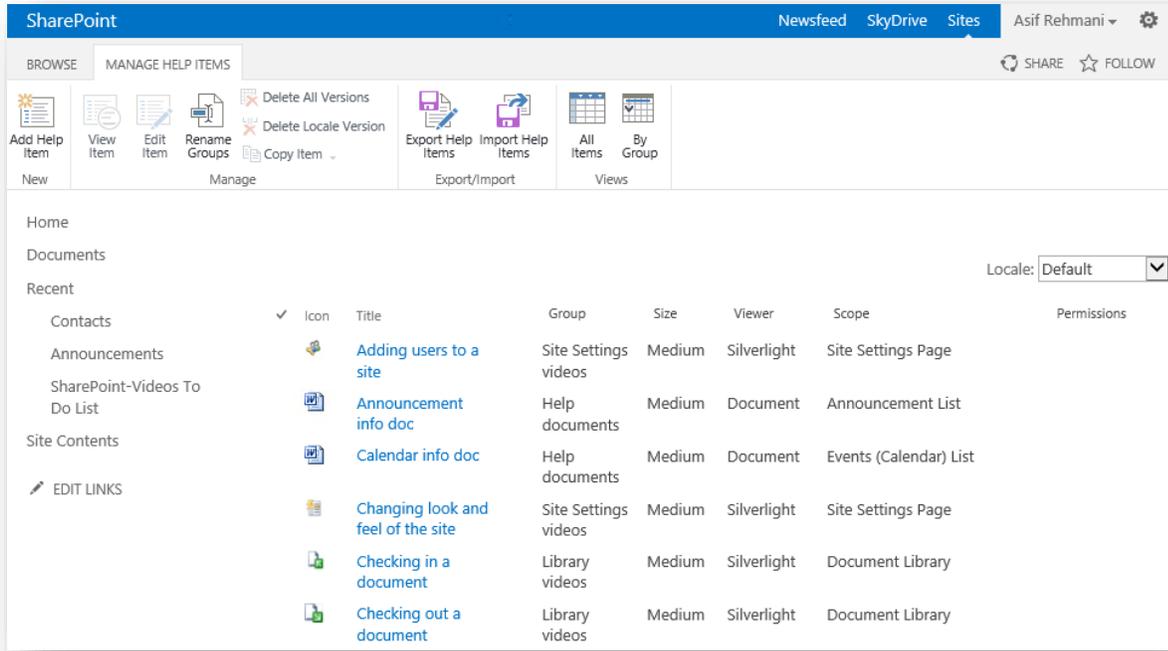
Reference video tutorial:

<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 → Site Settings. Click on **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.



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.

Help Item

Locale ID

Default

Help Item Details - Default

Group

Existing Group: <new>

New Group:

Title

Description

Link

Browse...

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

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:

For example, "http://company.com/sites/ContentHub/SiteAssets/Icons/checkin.png".

Icon Size

Specify the size of the icon.

Icon Size

Scope

Specify what list types or settings pages to associate the help item with.

Scope

- | | |
|---|--|
| <input type="checkbox"/> Tasks List | <input type="checkbox"/> Contacts List |
| <input type="checkbox"/> Announcement List | <input type="checkbox"/> Links List |
| <input type="checkbox"/> Document Library | <input type="checkbox"/> Custom List |
| <input type="checkbox"/> Publishing Pages Library | <input type="checkbox"/> Forms Library |
| <input type="checkbox"/> Publishing Page | <input type="checkbox"/> Blog Posts List |
| <input type="checkbox"/> Wiki Page Library | <input type="checkbox"/> Blog Post Categories List |
| <input type="checkbox"/> Wiki Page | <input type="checkbox"/> Blog Post Comments List |
| <input type="checkbox"/> Discussion Board | <input type="checkbox"/> External List |
| <input type="checkbox"/> Events (Calendar) List | <input type="checkbox"/> Site Settings Page |
| <input type="checkbox"/> Issue Tracking List | <input type="checkbox"/> Library Settings Page |
| <input type="checkbox"/> Survey List | <input type="checkbox"/> 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 or 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
- | | |
|---|---|
| <input checked="" type="checkbox"/> Add and Customize Pages | <input checked="" type="checkbox"/> Delete Versions |
| <input checked="" type="checkbox"/> Add List Items | <input checked="" type="checkbox"/> Approve Items |
| <input checked="" type="checkbox"/> Edit List Items | <input checked="" type="checkbox"/> Cancel Checkout |
| <input checked="" type="checkbox"/> Delete List Items | <input checked="" type="checkbox"/> Create Alerts |

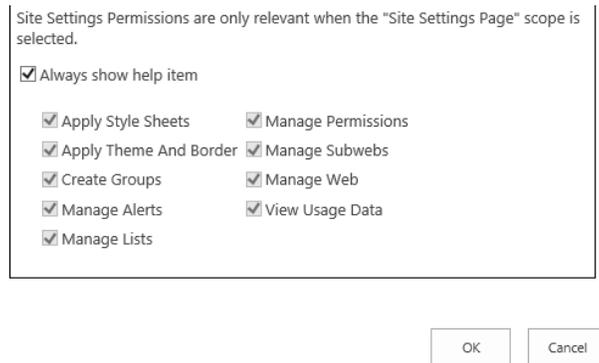
List or Library Settings Permissions

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
- Manage Alerts Manage Permissions

Site Settings Permissions

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



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

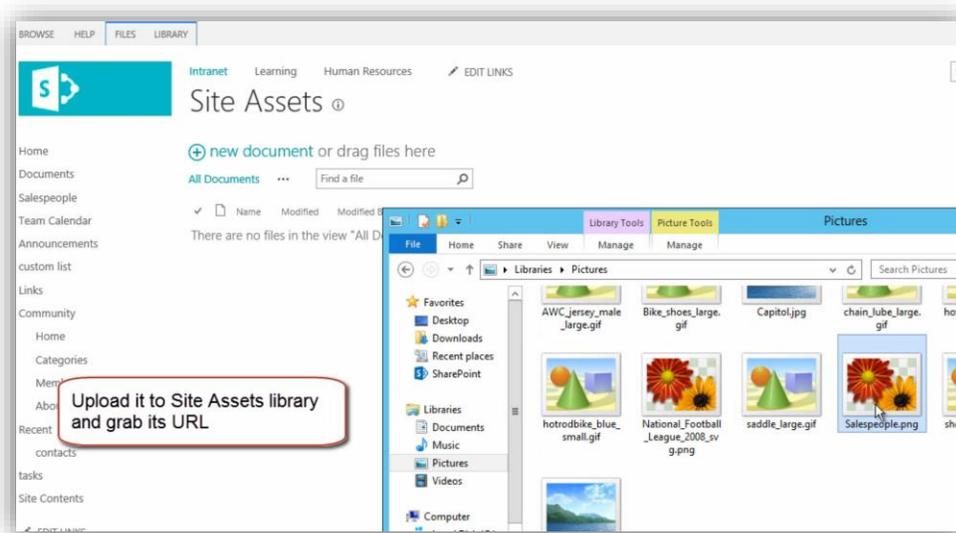
Reference video tutorial:

<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.

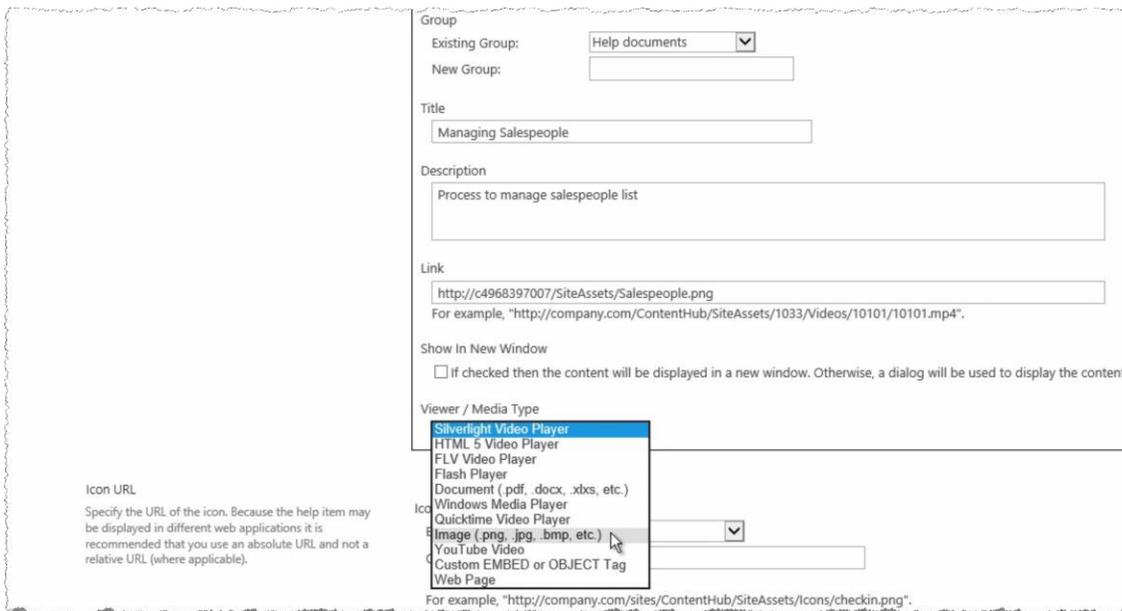


Once the image is in a repository available to SharePoint, you will now need to create a new Help item pointing to that image.

Navigate to VisualSP Farm Hub → Site Actions → Site Settings → 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
Existing Group: Help documents
New Group:

Title
Managing Salespeople

Description
Process to manage salespeople list

Link
http://c4968397007/SiteAssets/Salespeople.png
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
Flash Player
Document (.pdf, .docx, .xlsx, etc.)
Windows Media Player
Quicktime Video Player
Image (.png, .jpg, .bmp, etc.)
YouTube Video
Custom EMBED or OBJECT Tag
Web Page

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/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.



For example, "http://company.com/sites/ContentHub/SiteAssets/Icons/checkin.png".

Icon Size
Specify the size of the icon.
Small icon with label

Scope
Specify what list types or settings pages to associate the help item with.

Tasks List
Announcement List
Document Library
Publishing Pages Library
Publishing Page
Wiki Page Library
Wiki Page
Discussion Board
Events (Calendar) List
Issue Tracking List

Survey List
 Contacts List
Links List
Custom List
Forms Library
External List
Site Settings Page
Library Settings Page
List Settings Page

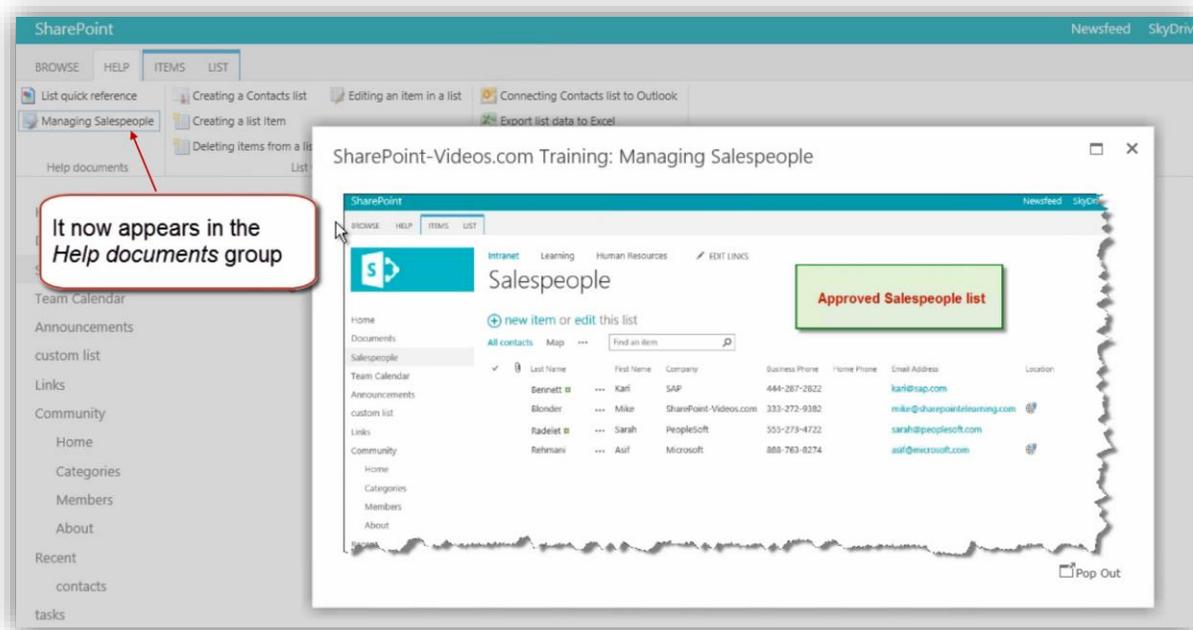
Custom Scopes
Separate multiple custom scope values with a comma. Custom scope values are used by the VisualSP Web Part.

Pick the appropriate scope where the Help item should be displayed

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.



Adding a custom video as a Help item

Reference video tutorials:

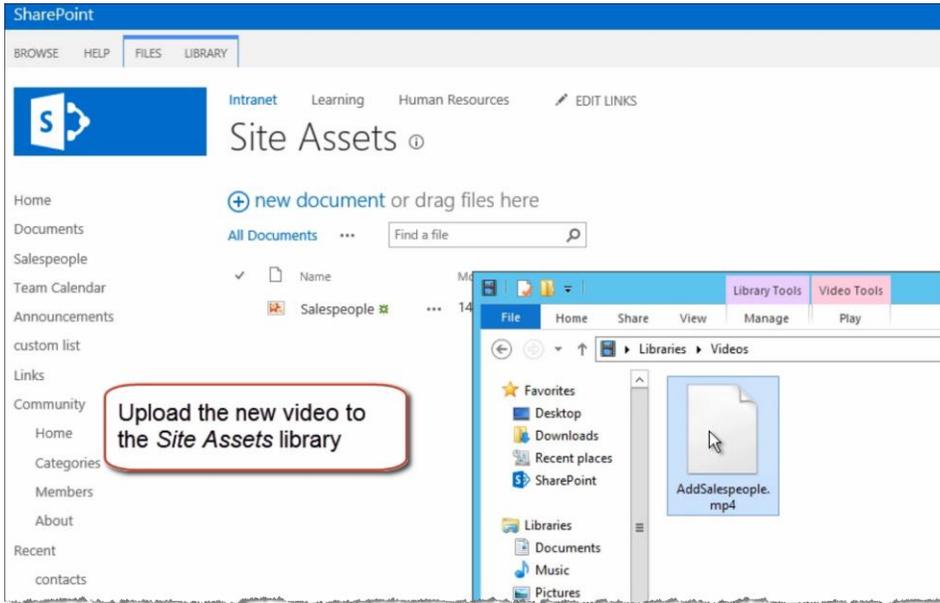
<http://sharepoint-videos.com/products/visualsp/visualsp-video-showcase/#AddingVideo>

<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.

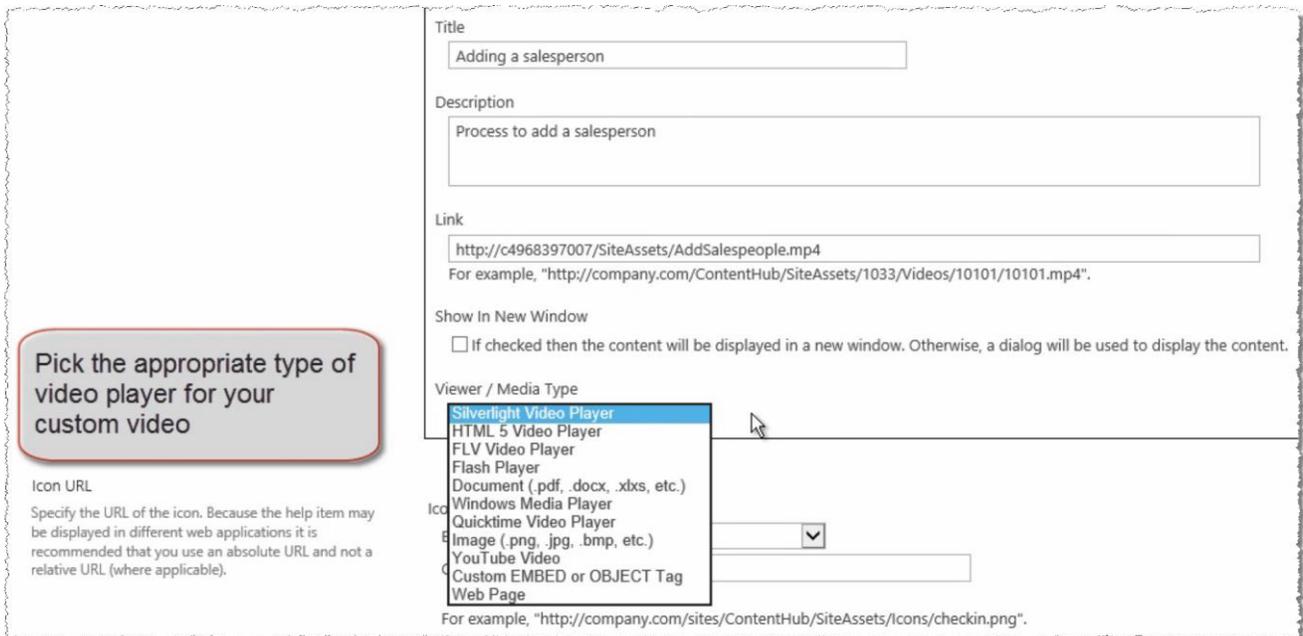


Once the video is in a repository available to SharePoint, you will now need to create a new Help item pointing to that video.

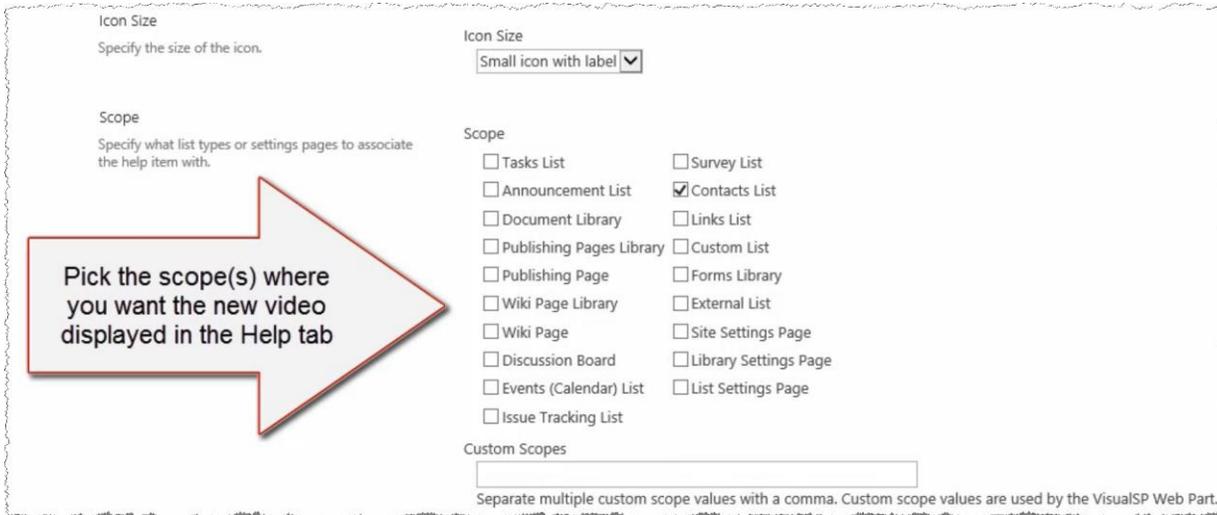
Navigate to VisualSP Farm Hub → Site Actions → Site Settings → Manage VisualSP Help Items.

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.



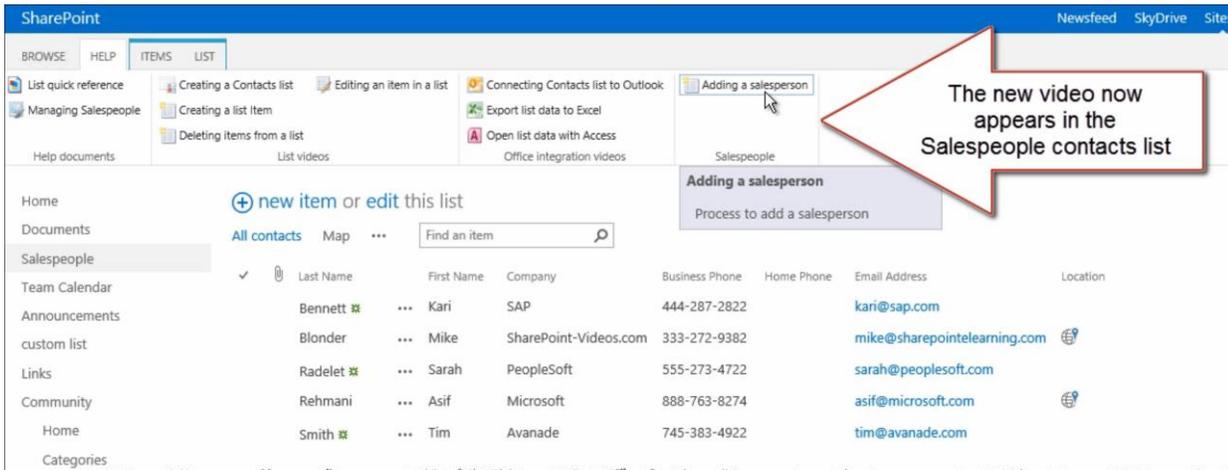
Move down the page to pick the appropriate icon (or supply your own) and then the scope(s) at which you would like to see this custom video appear.



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.



Enabling the Help tab in a Site Collection

Reference video tutorial:

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

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.

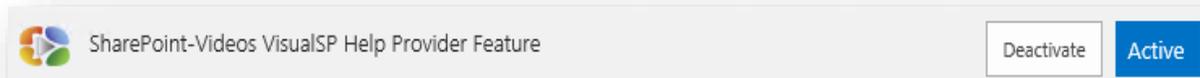
To enable a site collection to consume Help items, a site collection administrator must ensure to activate the **VisualSP Consumer Site Collection Feature** as shown in the following image:



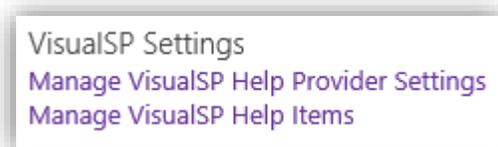
Exposing specific content at a Site Collection

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.



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.



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

Inherit Help Items

Specify whether you would like the ribbon to show help items from the parent help provider hub.

Inherit Help Items

Copy Items

Copy Help Items from Farm Hub?

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 to copy the Help items from the Farm Hub, it will be initially filled with Farm level Help items.

If the site collection administrator decided to not copy 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.

