Customizing the VisualSP™ Help System

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Introduction

VisualSP Help System 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.

Note: *VisualSP functionality is the same for SharePoint 2010 and 2013. The screenshots in this document are taken from SharePoint 2013, but apply equally well to the SharePoint 2010 product.*

Check out the latest functionality updates at the VisualSP demonstration video showcase.

Most of the tools you will need to manage and administer help content in VisualSP is located in on the Manage Help Content page.

Take a tour of the Manage Help Items Tab

Manage Help Items Ribbon Tour

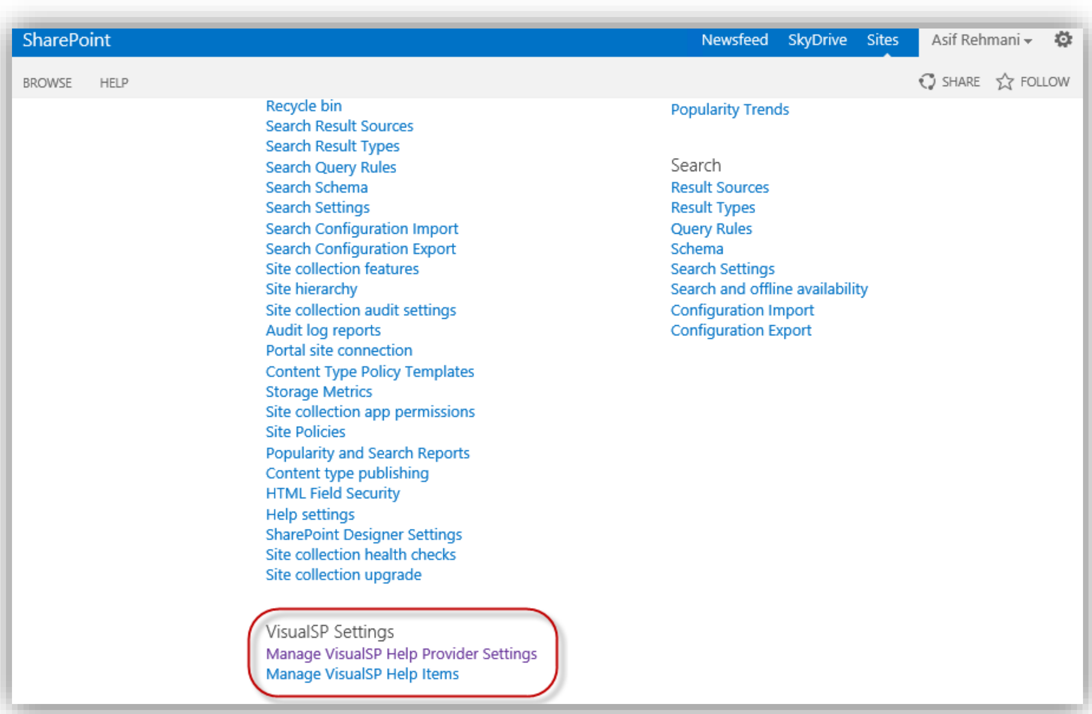
Beginning with the newest version of VisualSP (4.7), you will notice a Help tab for Help. This tab will include additional resources to help you manage help content in all your site collections.

Adding and Editing Farm-wide Help Content

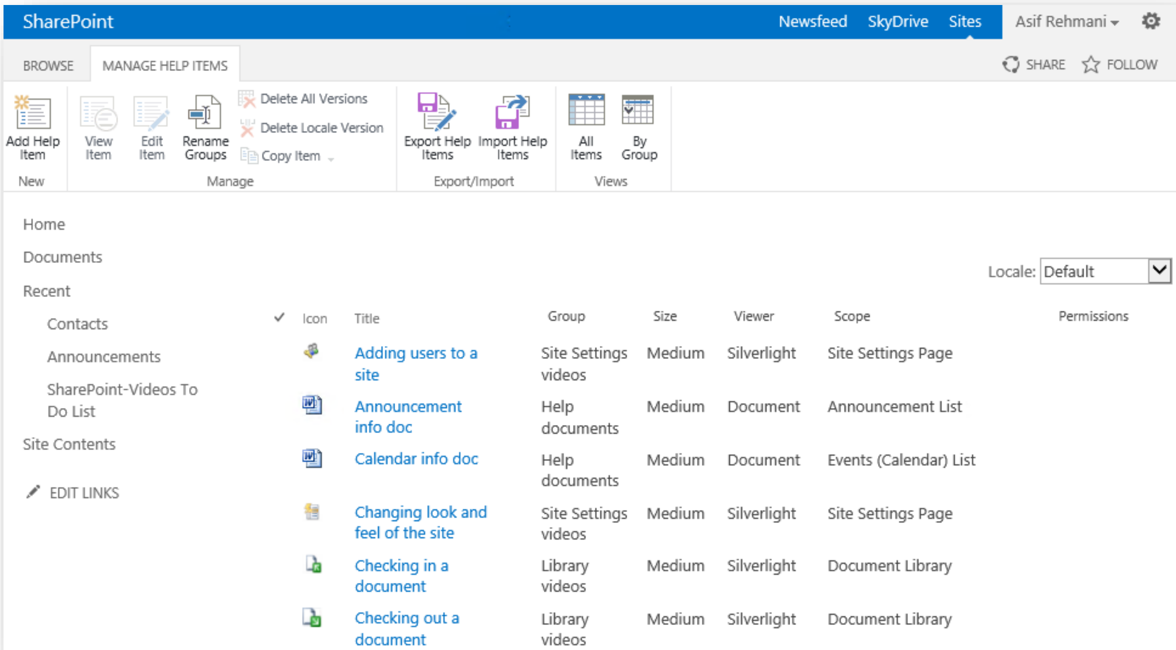
Note: *The functionality to control Help content across a farm is not available in the VisualSP Express system. In the Express system, all Help items must be maintained at the site collection level.*

Reference video tutorial:
[Configure Help]()

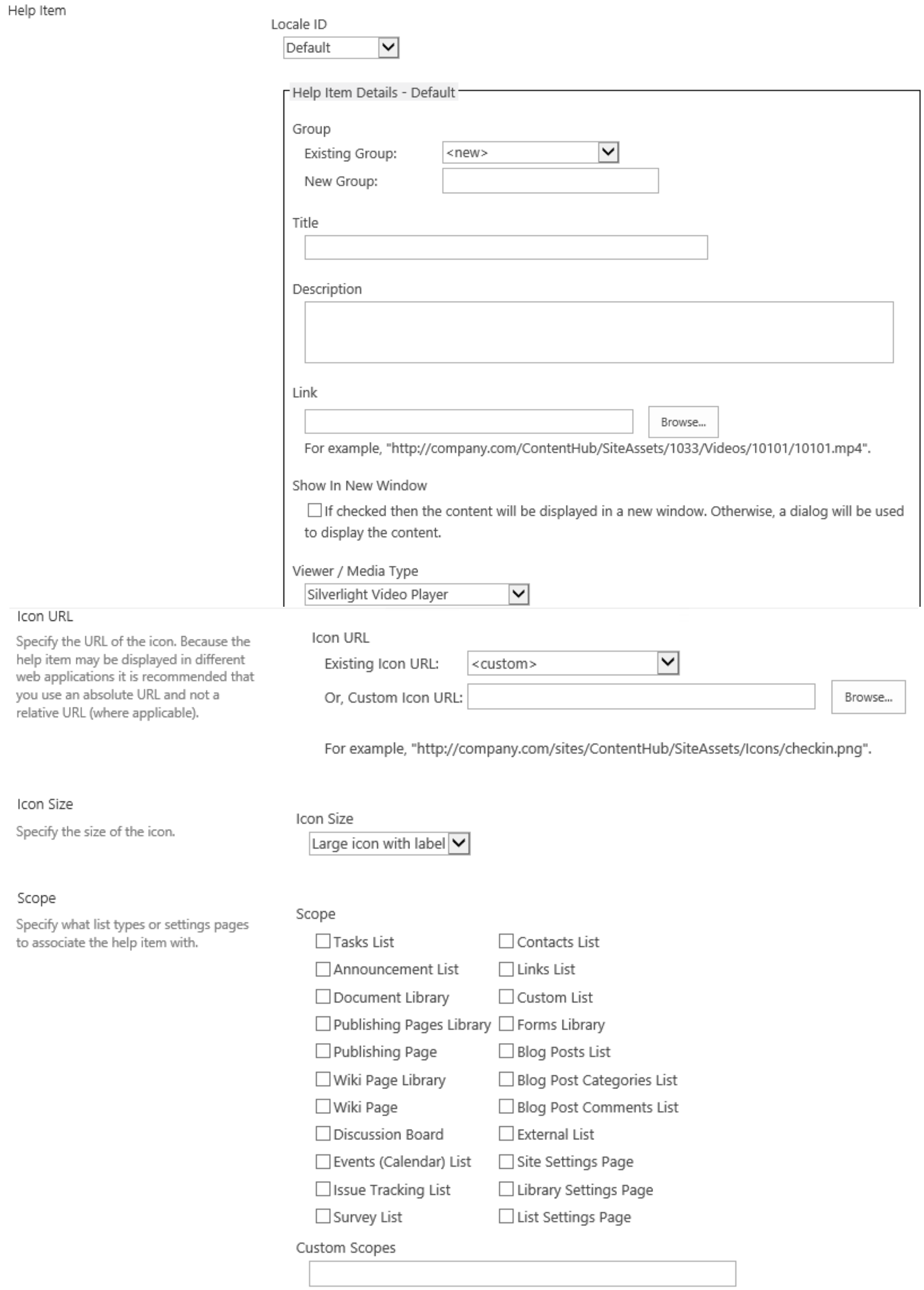
By default, Help content is controlled throughout the farm from the top level site of one site collection that has been designated as the **VisualSP Farm Hub**. To add new Help content, navigate to that site then **Site Actions → Site Settings**. Click on **Manage VisualSP Help Items.**

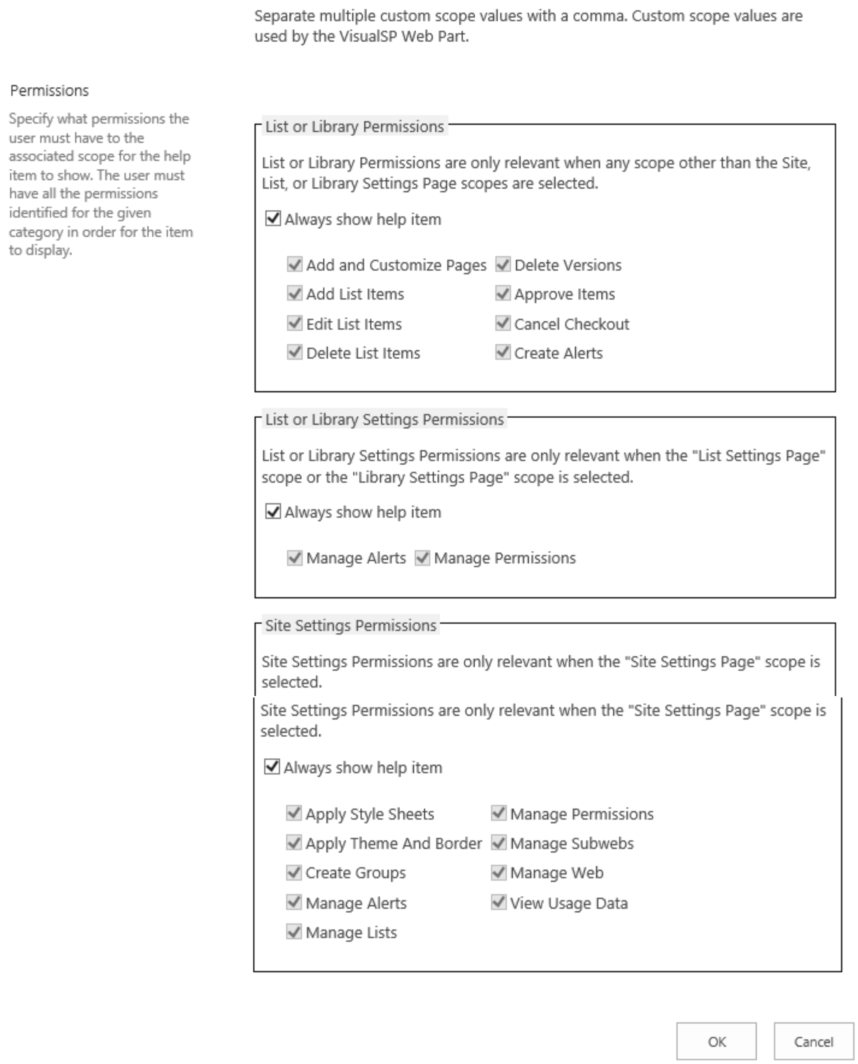


Here you can edit existing Help items or create new ones. Editing an item simply means clicking on it and changing its properties.



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





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

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

Exporting / Importing Help Items

You may import Help items from one site collection to another, by using the buttons in the Import/Export group of the Manage Help Items ribbon.

Learn how to import items from one site collection to another:

Exporting/Importing Help Items

First, from the site collection from which you'd like to export items, click Export Items. And accept the default if you wish to include content from all Locale IDs.

Respond yes to the prompt to save *VisualSPHelpItems.xml*. The file size is generally small and can be easily transported.

Now, from the site into which you'd like to import these items, click **Manage VisualSP Help Provider Settings** to ascertain from where the site collection inherits its Help items. From that location, click the **Manage VisualSP Help Items** link in Site Settings.

Click the **Import Help Items** button in the Manage Help Items ribbon and locate the file you saved containing the help items you'd like to import on the next dialog box. You may choose to overwrite or not overwrite any items it finds that appear to be duplicates.

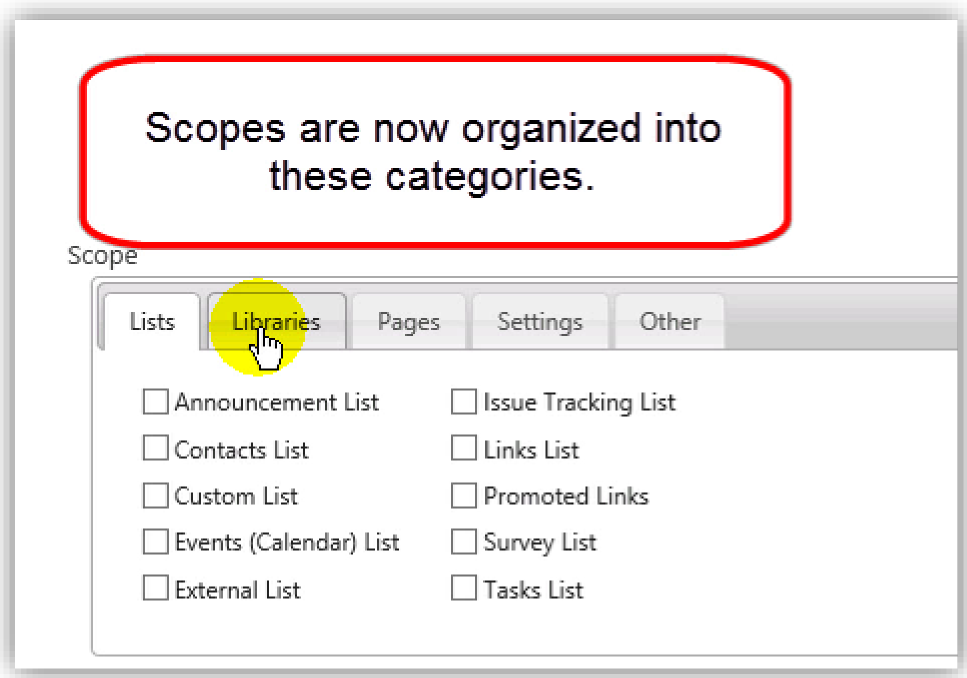
Explore Built-In Scopes

Scopes are identified to determine what content is made visible for the user in what context. For example, if the task at hand is working with a Blog Post List, a pre-determined set of content is made available in Help. You may add scopes to items to augment this collection.

Check out how modify scopes that apply to Help items:

Built-in Help Scopes

Locate the item you wish to include in a scope for which it is not currently defined and open it. Scroll down to the Scopes section of the page. In the newest version of VisualSP (4.7) these scopes are arranged in categories.



Select the category and then the scope in which you would like this item to appear.

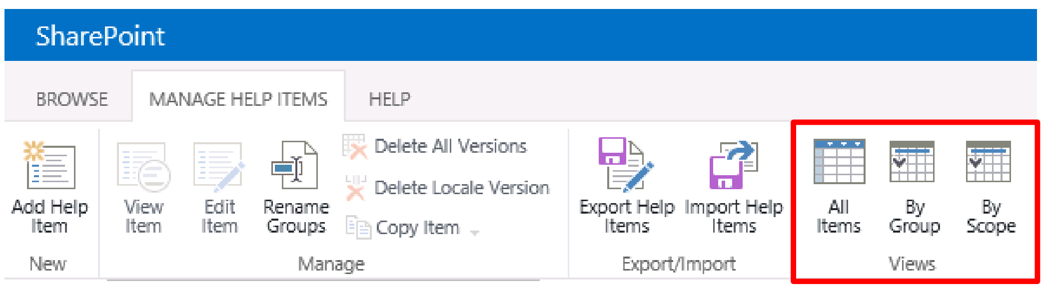
Exploring and Finding Specific Help Items

There are several ways to locate content that has already been added. Based on what you know you can either use the By Group or By Scope views or the native filtering capability of SharePoint lists.

Using the By Group view will show you what help items will appear in each ribbon group the user sees from their help tab. By Scope will show you what help items appear based on the context of the page, site or resources being accessed by the user. To see all the scopes assigned to items that have a scope in common, use the native list filter capability, rather than the By Scope view.

Explore different ways to locate Help items.

[Finding Specific Items]

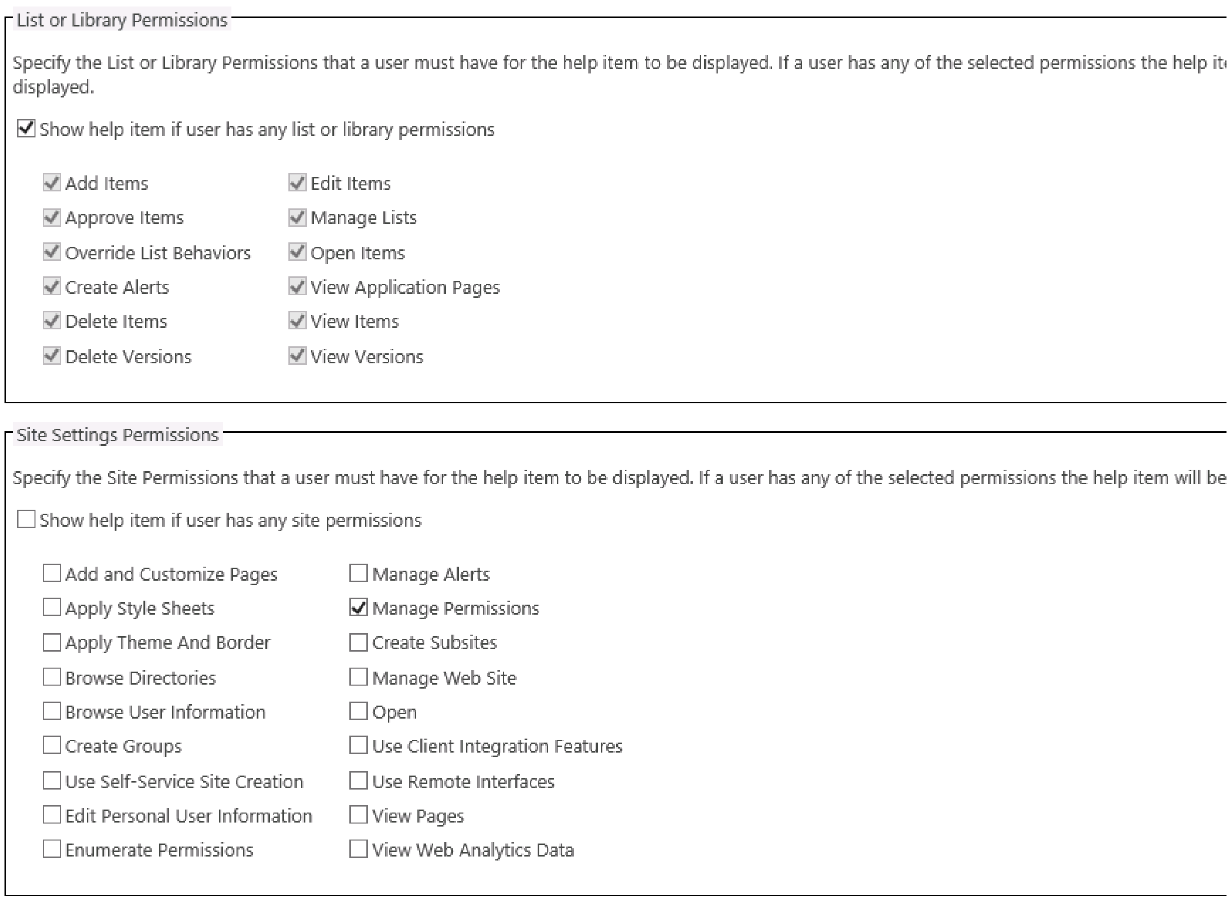


Permission Based Help Content

You can customize what help items appear based on the permissions the user has. For example, you may only want to show how to delete items, for those who are permitted to do it. This is available in VisualSP 4.7 and above. After clicking on the item you would like to control through permissions, scroll down to the Permission section. Leave only those items checked which you require in order for the item to appear in their view of Help. After modifying Permissions, you will see those listed in the view.

Learn to customize Help items by permission

[Using Permissions to Control Help Ribbon Content]



✓	Icon	Title	Group	Size	Viewer	Sequence	Scope	Permissions
		Add to the Quick Launch	Library Look and Feel	Medium	Silverlight		Library Settings Page	
✓		Add users to a site	Site Access and Security	Large	Silverlight		Site Settings Page	Any List Setting Permission, Any List Permission, Manage Permissions

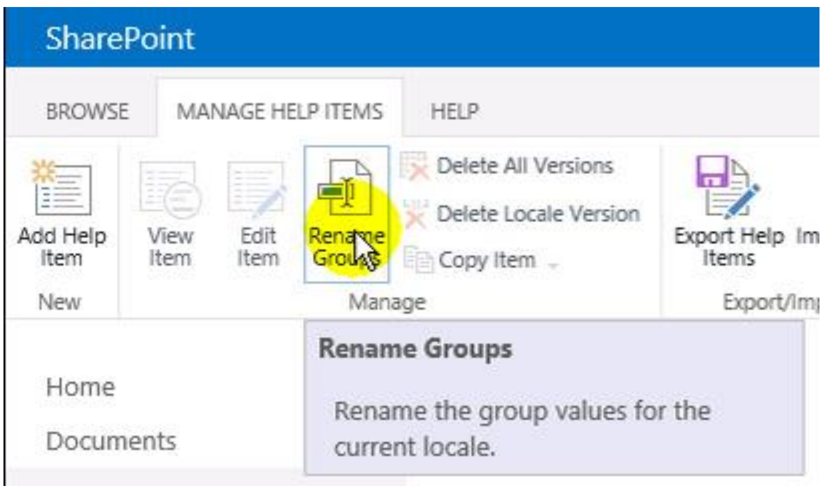
Ordering Ribbon Groups and Help Items

By default, groups are laid out across the ribbon in alphabetical order. Buttons within groups are arranged alphabetically. But, you can change that based on specific needs by assigning sequence numbers.

See how to reorder groups on ribbons and buttons within groups

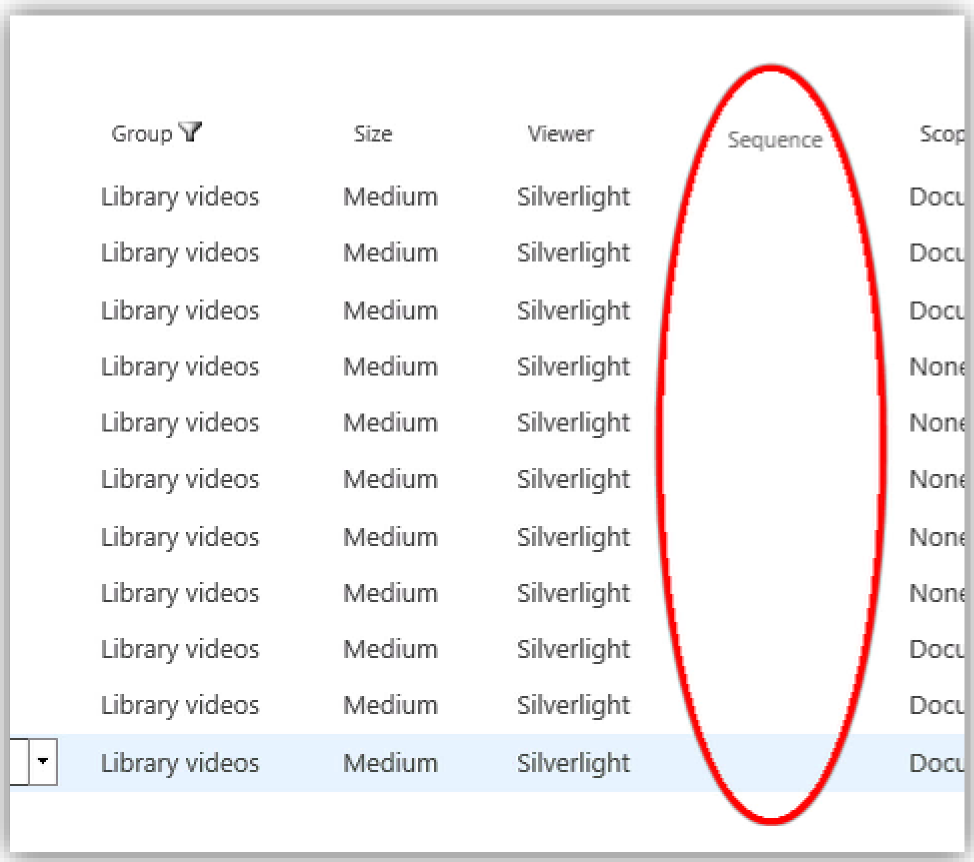
Ordering Groups, and Items within Groups

In the Manage group of the Manage Help Items ribbon, click Rename Groups.

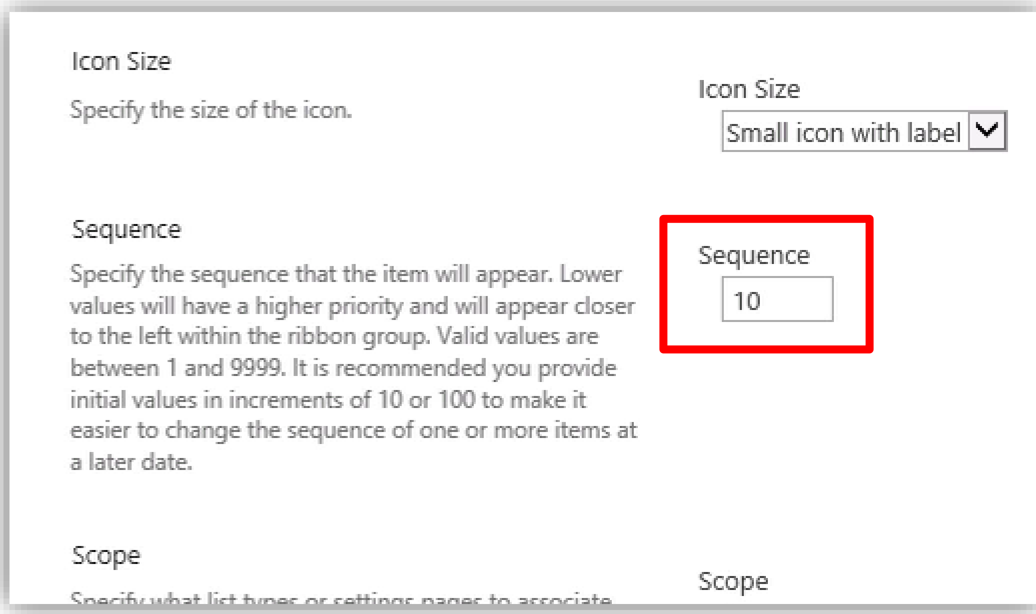


By default, no sequence numbers are assigned. Any group with a sequence number will appear before any other group without one. It is best to assign sequence numbers that leave you some flexibility for later customization, such as 10, 20, 30, so later you could sequence an item between 10 and 20 by assigning 15.

To change the sequence of items within a group, you'll need to edit the individual item and assign it a sequence number. It is a good idea to check for existing numbers in the Sequence column of the item list.



Edit the item and locate the Sequence field.


Icon Size
Specify the size of the icon.
Icon Size
Small icon with label
Sequence
Specify the sequence that the item will appear. Lower values will have a higher priority and will appear closer to the left within the ribbon group. Valid values are between 1 and 9999. It is recommended you provide initial values in increments of 10 or 100 to make it easier to change the sequence of one or more items at a later date.
Sequence
10
Scope
Scope

Add Training Content on any Web Page

You can add Help items/Training content to a specific page by using the VisualSP web part. By default what appears in the web part is the same collection of groups and items that appears in context for the page you're editing. With the addition of the Group Filter Value field, you can override what would normally appear.

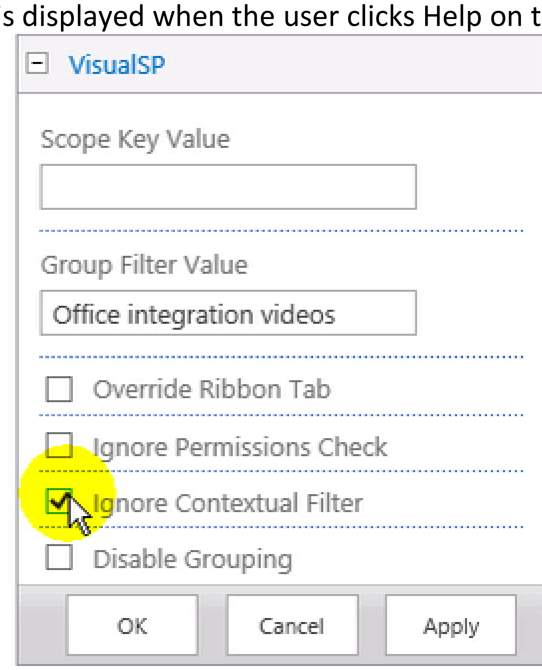
Learn how to override which groups appear in the VisualSP Web Part

Add Group to a Page using VisualSP Web Part

In edit mode on a page, click the Insert tab and Web Part button. Locate the VisualSP web part and click Add.

Edit the web part and, after changing the default name at the top, expand the VisualSP section. Type or copy/paste the group name that you would like to appear instead of the defaults showing. Now, click the Ignore Contextual Filter check box.

You'll notice that the group now shown on the page is the one you added.
If you also clicked Override Ribbon Tab, the web part would disappear from the page content and actually change what is displayed when the user clicks Help on this page.



Adding a Custom Image as a Help Item

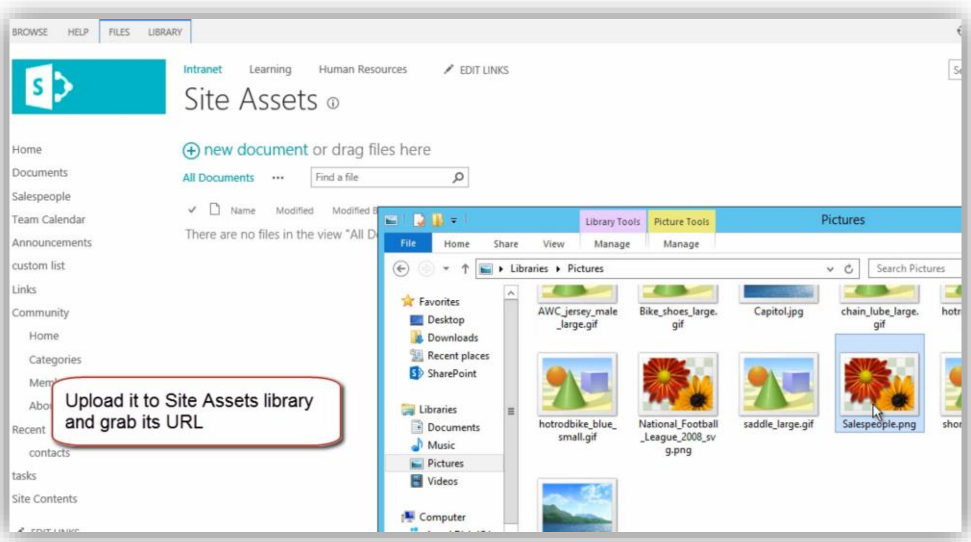
Reference video tutorial:

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

Any custom image, screenshot, or 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 within 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.*

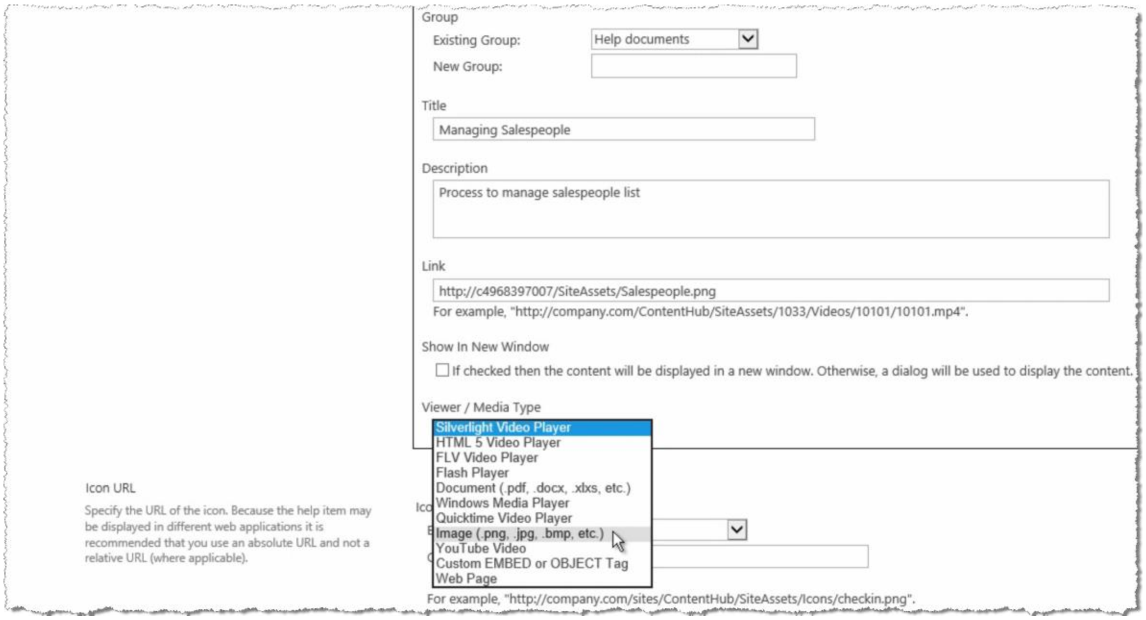


Once the image is in a repository available to SharePoint, you will now need to create a new Help item pointing to that image.

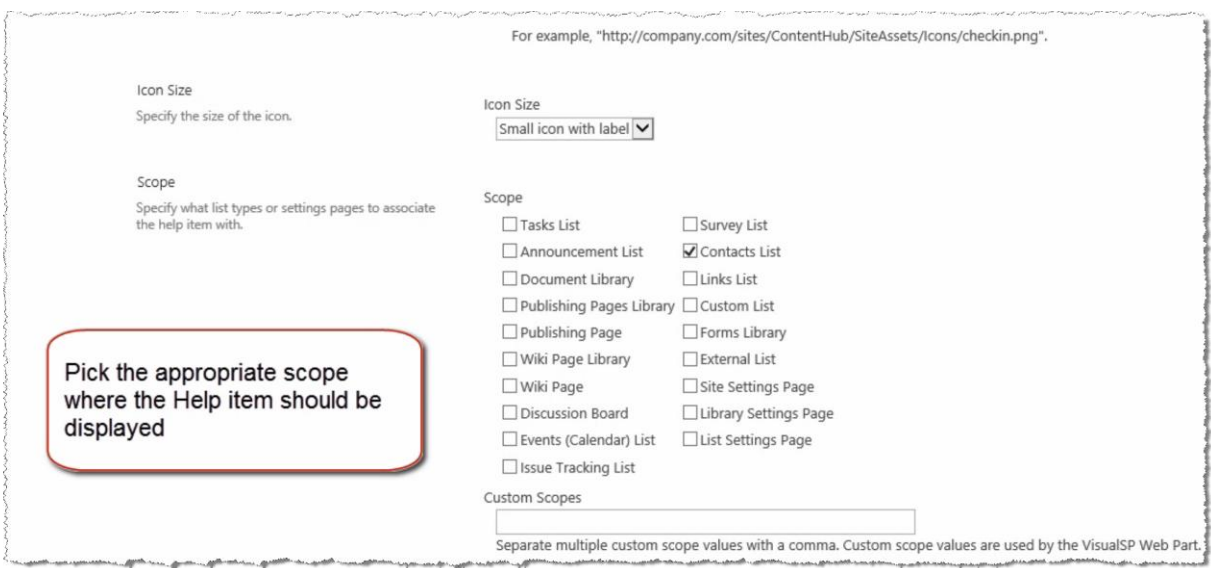
Navigate to **VisualSP Farm Hub → Site Actions → Site Settings → Manage VisualSP Help Items**.

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.



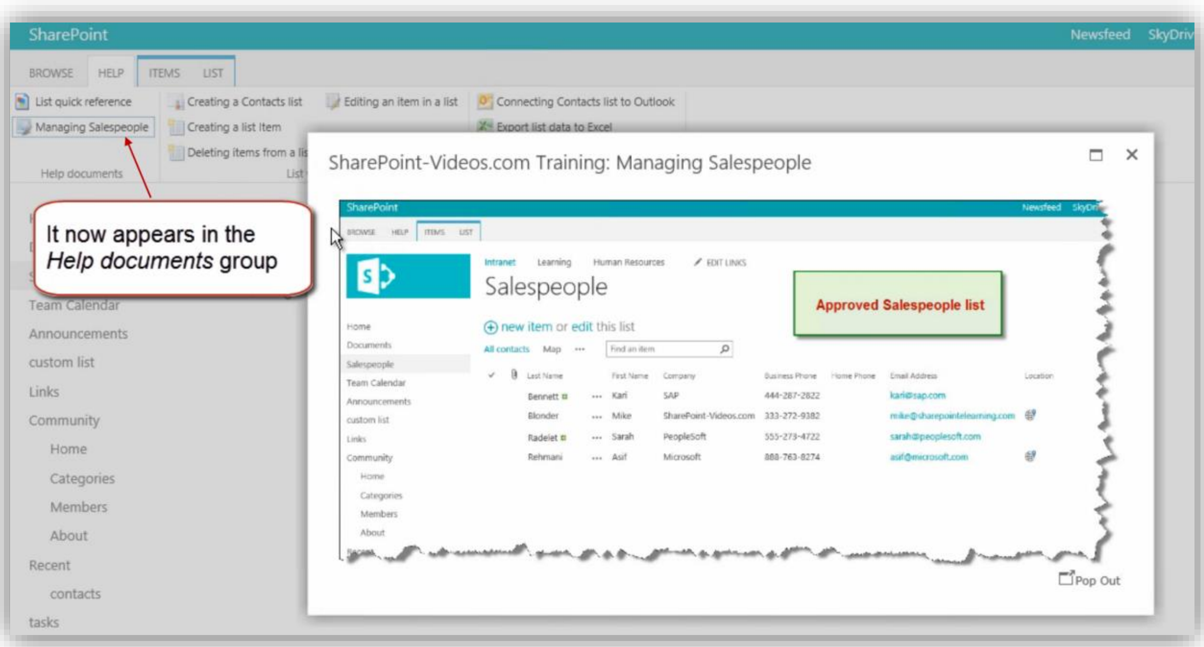
Move down the page to pick the appropriate icon (or supply your own) and then the scope(s) at which you would like to see this custom image appear.



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

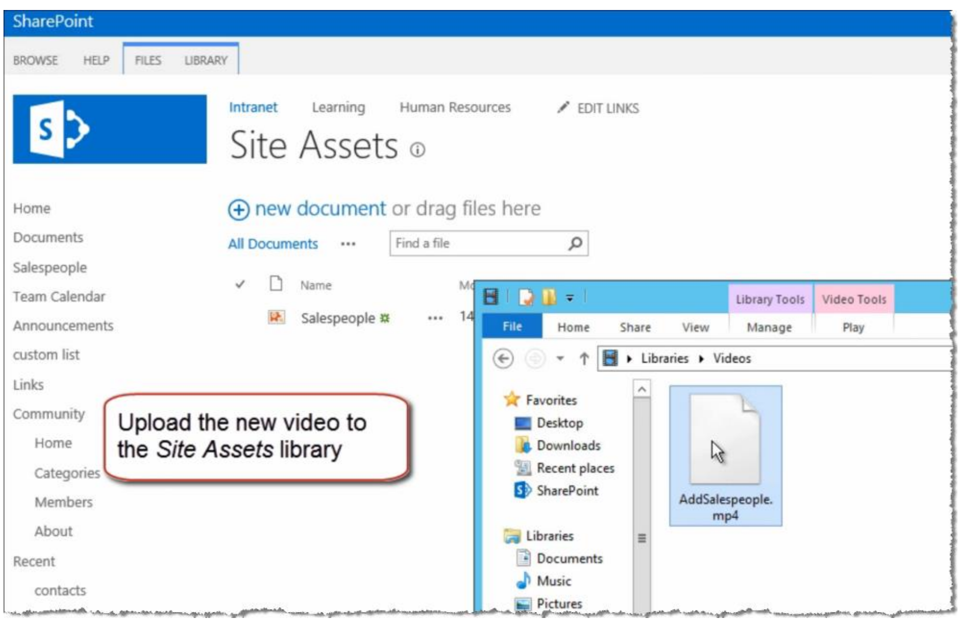
Reference video tutorials:
http://sharepoint-videos.com/products/visualsp/visualsp-video-showcase/#AddingVideo

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.*

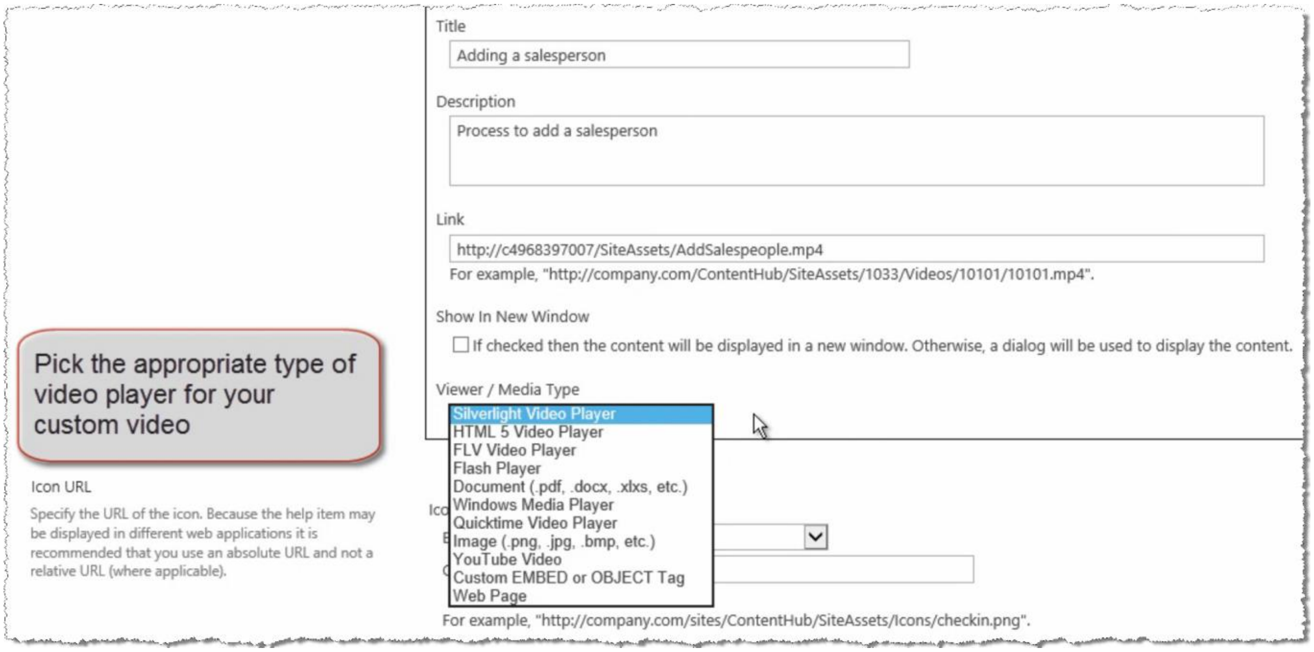


Once the video is in a repository available to SharePoint, you will now need to create a new Help item pointing to that video.

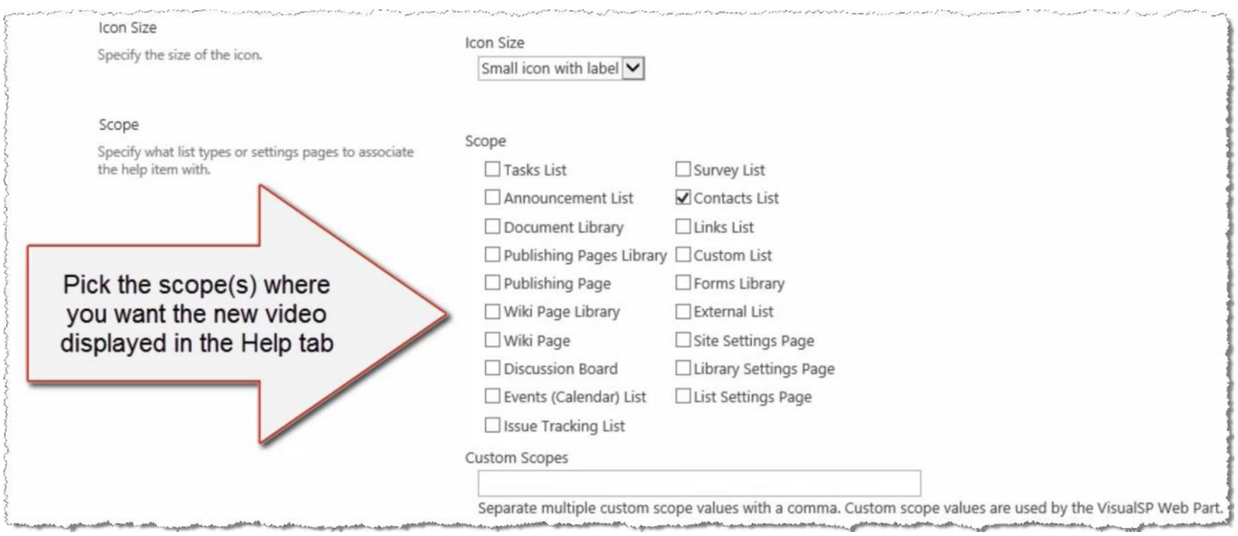
Navigate to **VisualSP Farm Hub → Site Actions → Site Settings → Manage VisualSP Help Items**.

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.



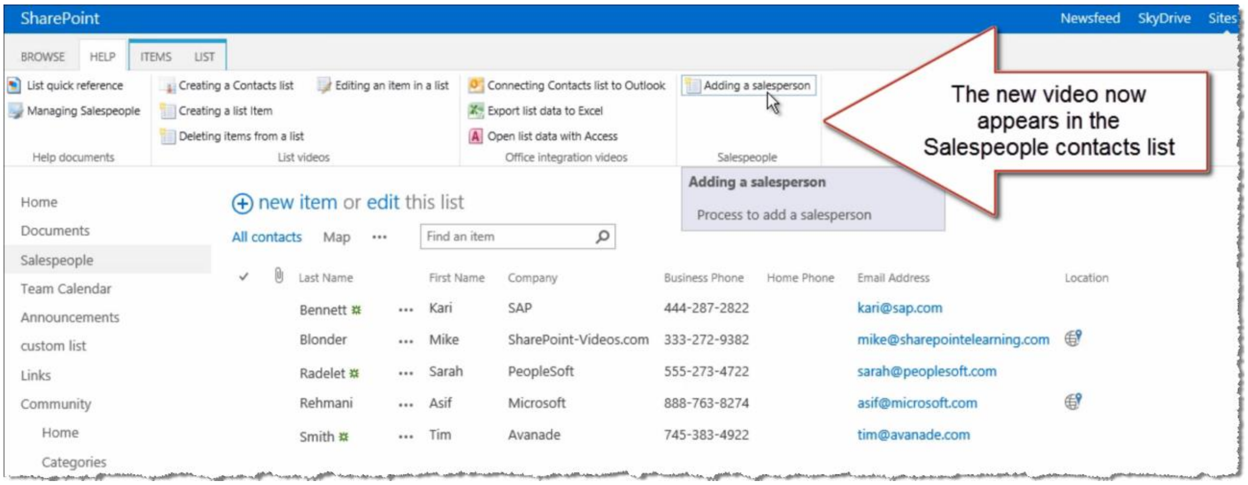
Move down the page to pick the appropriate icon (or supply your own) and then the scope(s) at which you would like to see this custom video appear.



Below the Scope section, you will also find the Permissions section. Use the settings in that section as needed to specify what permissions users must have 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 will now be visible at the appropriate location.



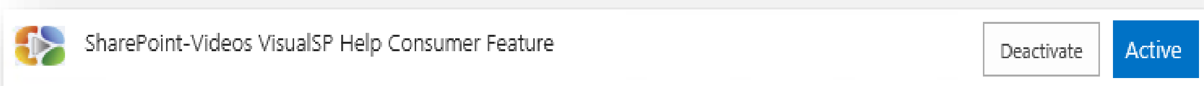
Enabling the Help Tab in a Site Collection

Reference video tutorial:

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

All site collections inherit Help content from the farm-wide settings by default. If the Help tab is not visible on a particular Site Collection, it has not been set as a ‘consumer’ of the Help items.

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



Renaming the Help Tab

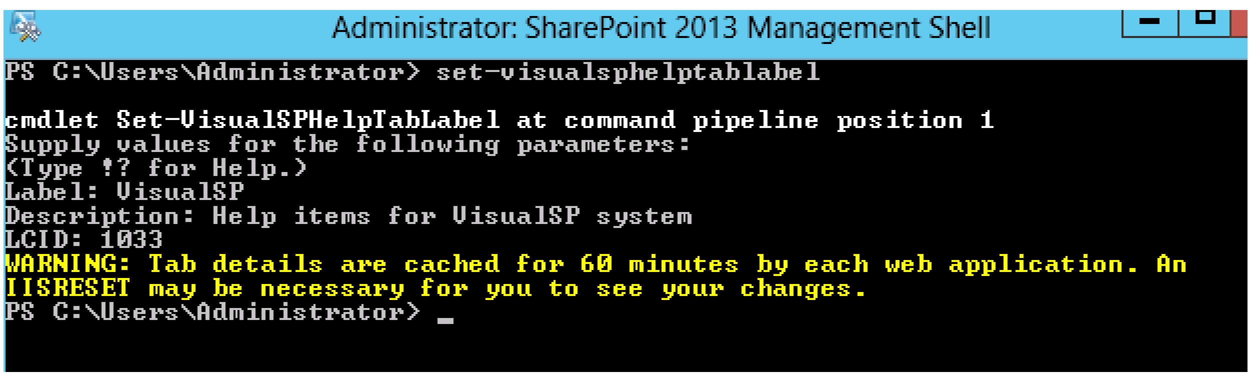
Beginning with the latest version of VisualSP (4.7), you can re-brand the Help tab by changing its text to reflect your organization name or help program. This needs to be done from SharePoint PowerShell on the SharePoint server.

Brand your Help tab:

[Customize Help Tab Branding]

From the prompt, type **Set-VisualSPHelpTabLabel** and respond to the prompts that follow. If you leave any responses blank, your change will not take effect.

- Label: This is what the name of the Help tab will become
- Description: This will pop up over the tab when a user hovers over it.
- LCID: This is the Locale ID (e.g. 1033 for English-United States)

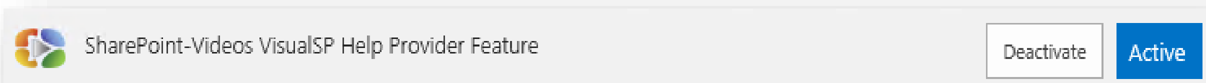


Exposing Specific Content at a Site Collection

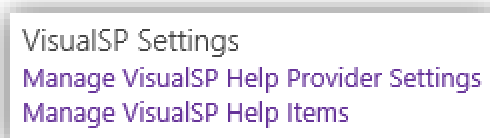
In the VisualSP Standard edition, all site collections inherit the content by default from the farm-wide settings. However, a site collection administrator can decide to show content specific to his or her users' needs.

***Note for VisualSP Express users:** The following process is used to maintain Help items at the site collection level.*

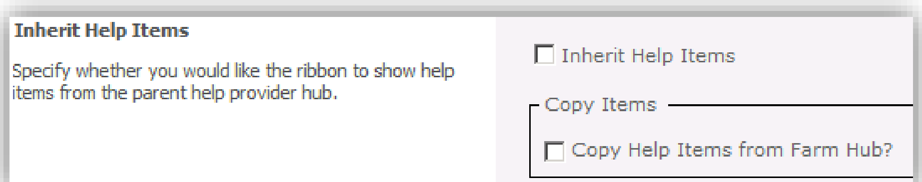
The site collection administrator must first activate the **VisualSP Provider site collection feature** to be able to administer the Help content at the site collection level.



Then the Site Settings page will show the **VisualSP Settings** section 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 customize from there.

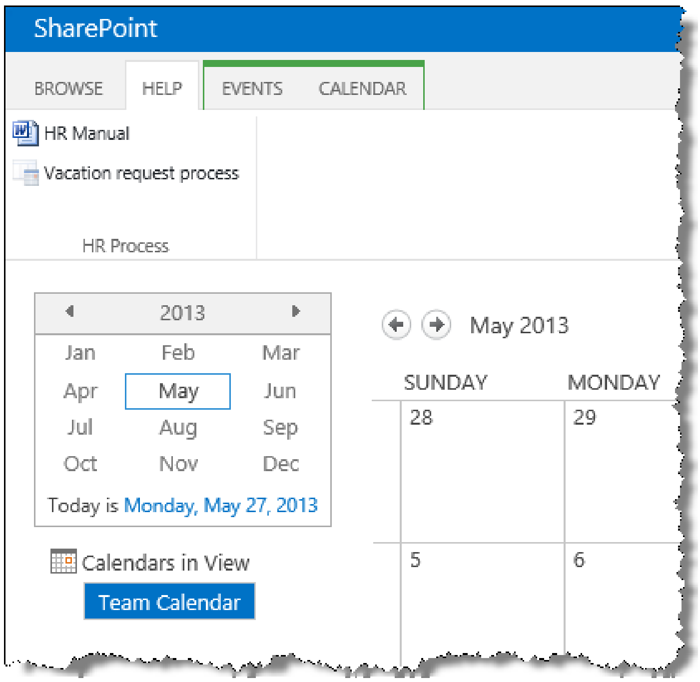


Manage VisualSP Help Items
This page looks and behaves exactly like the one at the Farm Hub level. New items can be added and existing items can be edited to show at the site collection level.

If the site collection administrator decides **to copy** the Help items from the Farm Hub, it will be initially filled with Farm level Help items.

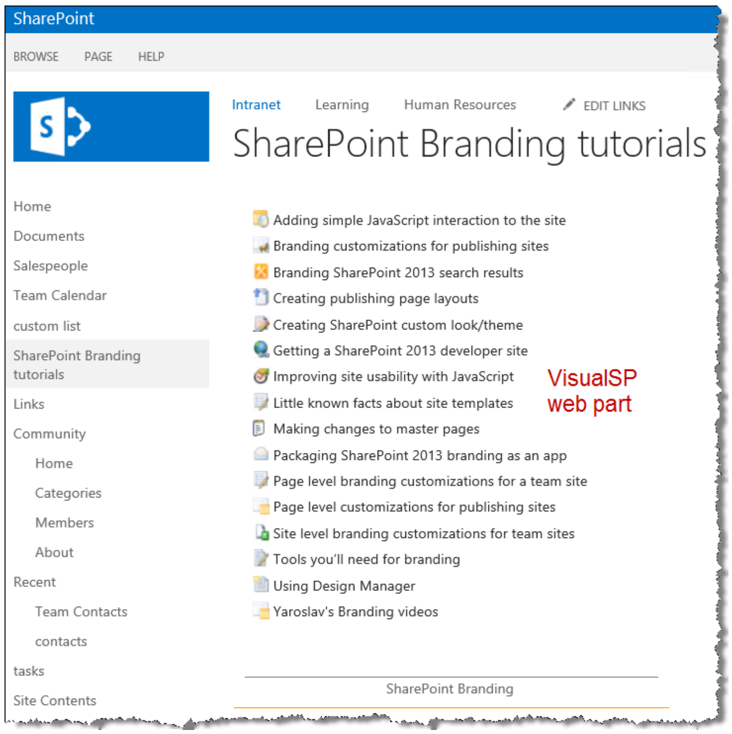
If the site collection administrator decided **to not copy** the Help items from the Farm Hub, it will initially be empty.

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.

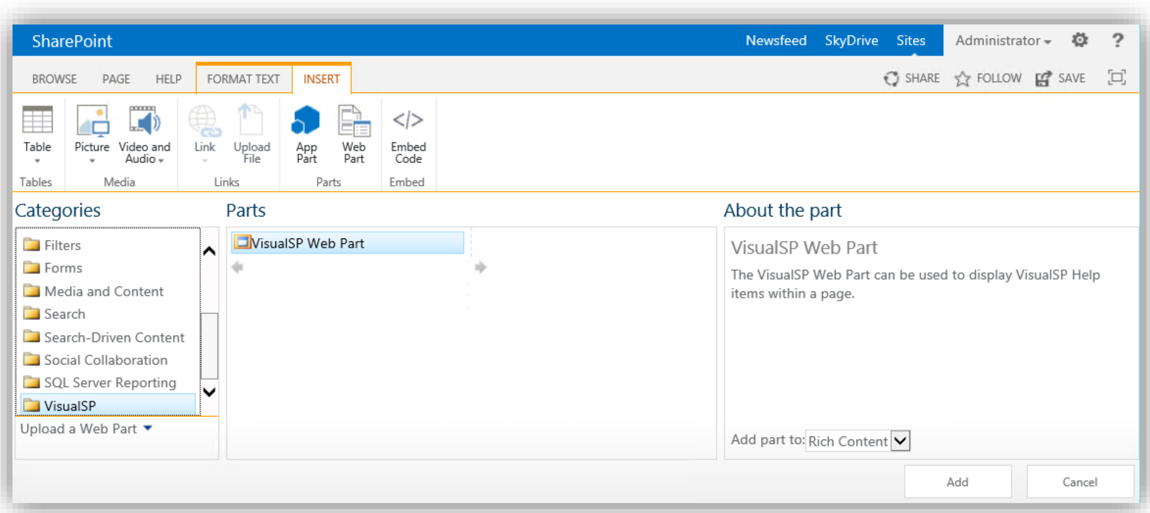


The VisualSP Web Part

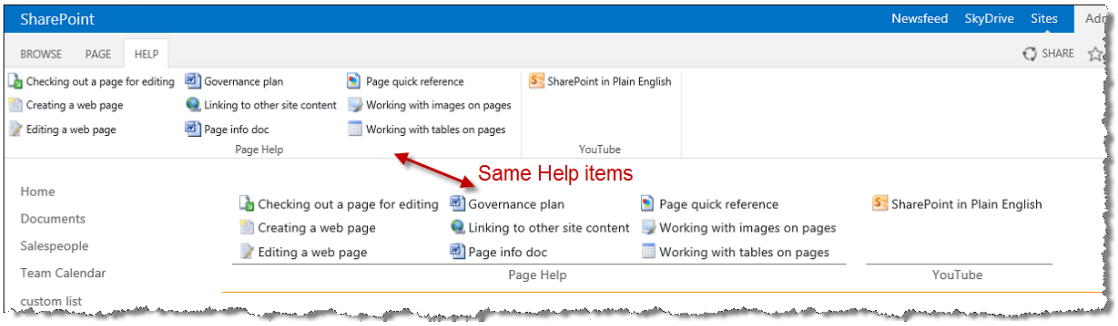
In addition to showing content in the Help tab, you can also show content at any location on a page using the VisualSP web part.



The Help content assets (video tutorials, reference documents, tip sheets, links etc.) that appear in the web part behave exactly the same way as the ones that appear on the Help tab. The VisualSP Web Part is installed automatically as part of the VisualSP installation. You will find this web part under the VisualSP category as shown below.



When this web part is first added to a SharePoint page, it will show the same content in the web part that appears on the Help tab for that page.



The web part can be resized just like any other SharePoint web part. It can be placed on any editable SharePoint page to serve up the Help content to the users.

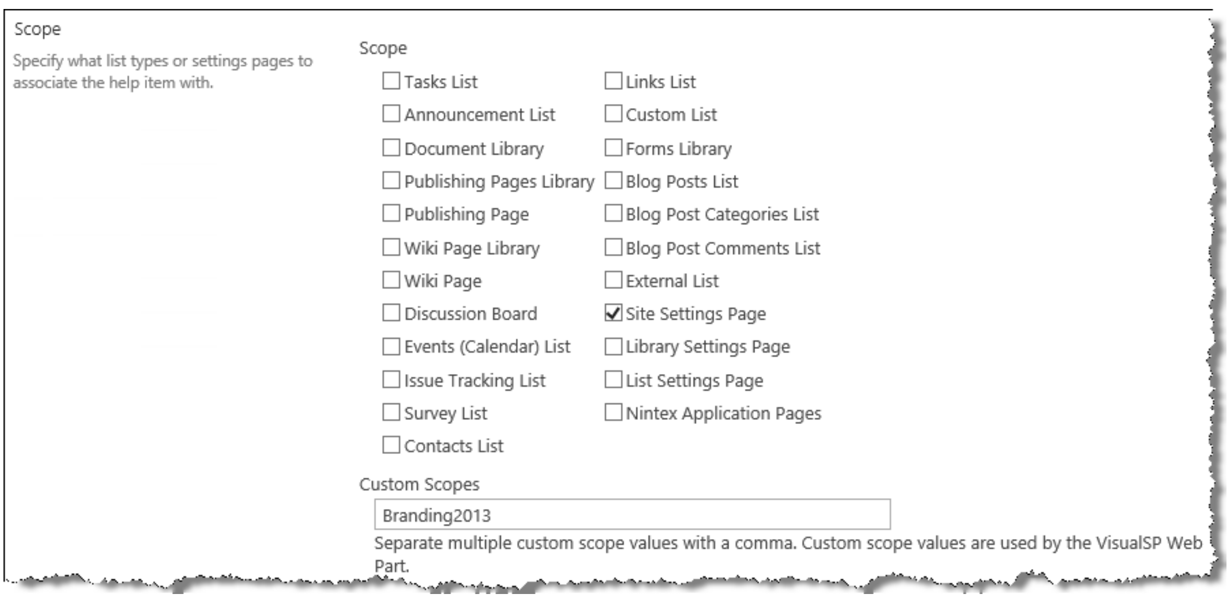
Configuring the VisualSP Web Part to Show Specific Help Content

Reference video tutorial:

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

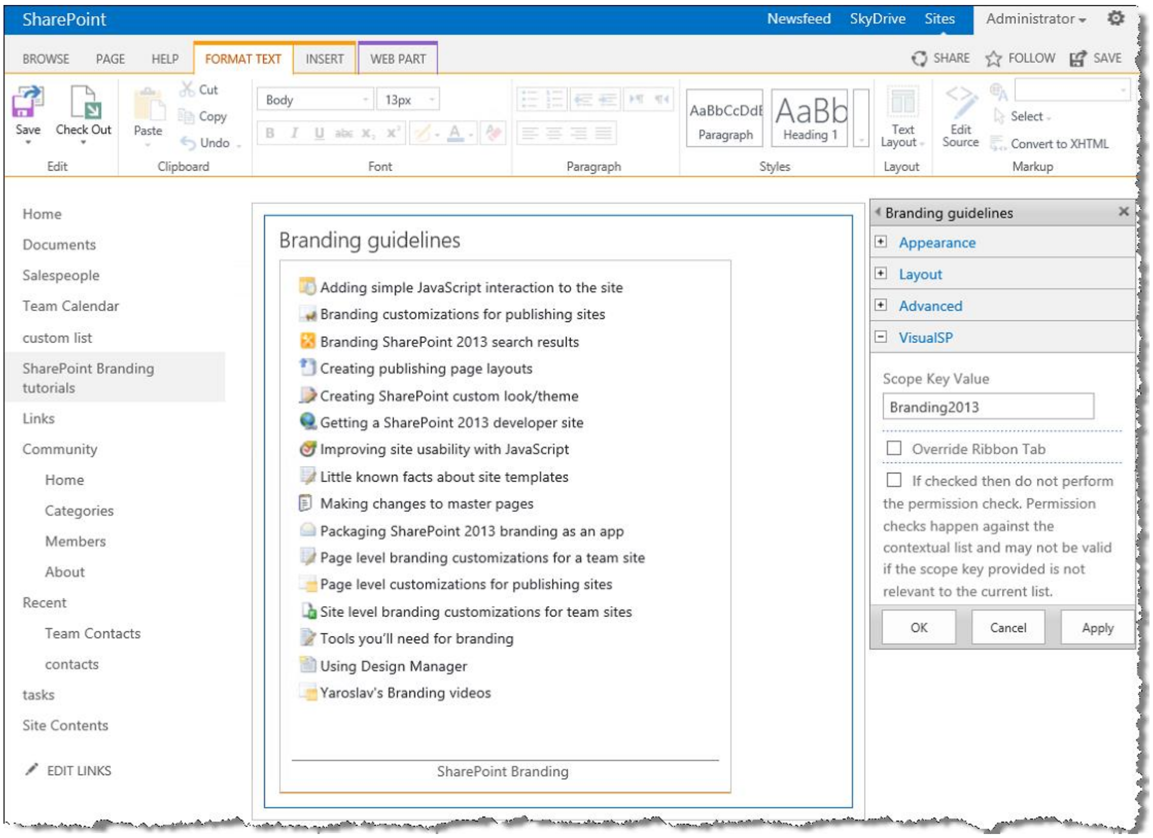
The VisualSP web part has the capability to show all types of Help items. This web part works with the custom scope capability available within the ***Manage VisualSP Help Item*** page. To configure a Help item to show in the web part, navigate to that Help item page's *Scope* section. One of the scopes available in that section is called ***Custom Scopes***. This text box accepts any arbitrary alphanumeric value. The same value can then be used later in the VisualSP web part to show this Help item.

In the following example, the custom scope for this Help item is declared to be ***Branding2013***.



A VisualSP web part can show this Help item by simply specifying this custom scope in the web part properties.

The following screenshot shows the VisualSP web part task pane. Under the *VisualSP* section, the *Scope Key Value* has been set to *Branding2013*. All of the Help items that have the *Custom Scopes* values set to *Branding2013* automatically show up in this web part.

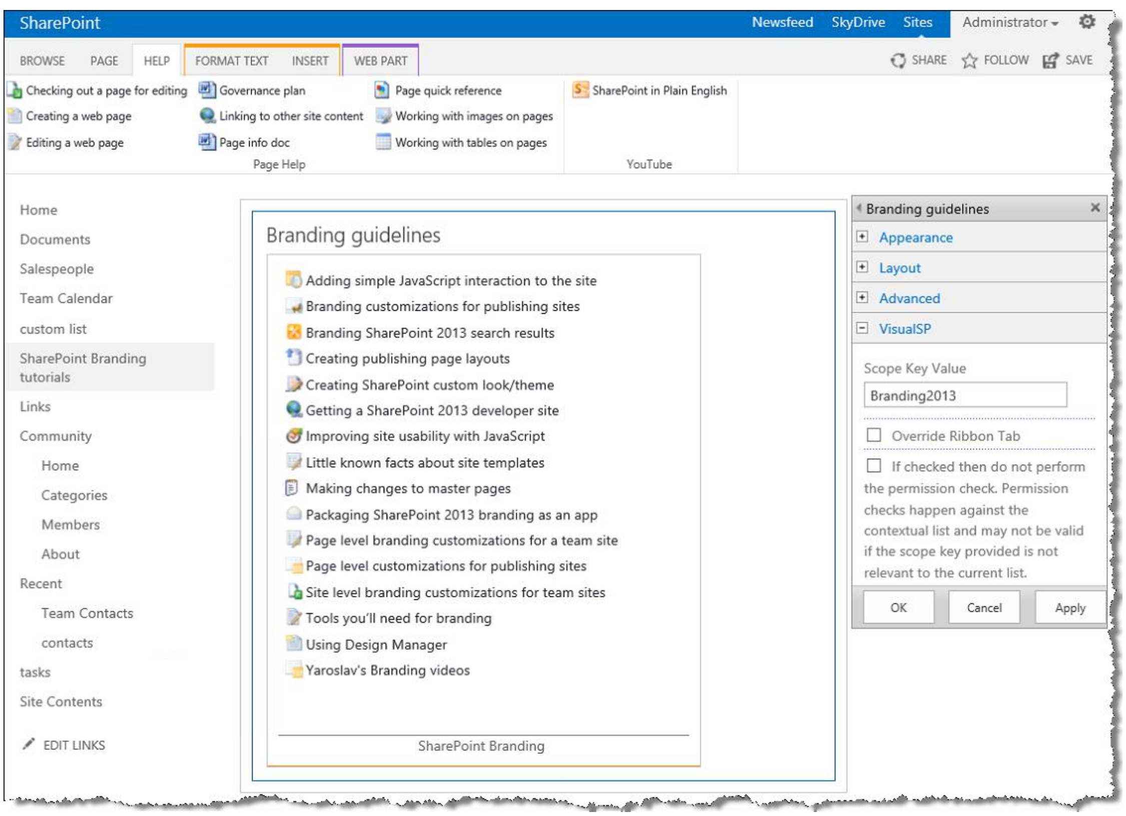


Overriding the Contents of the Help Tab

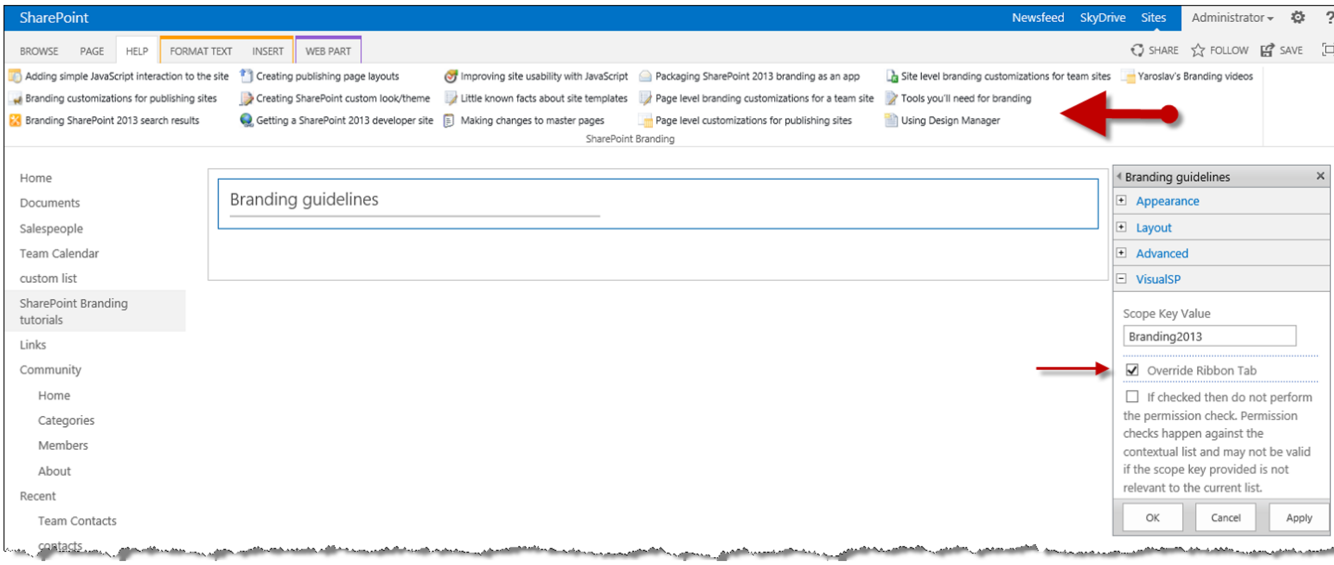
Reference video tutorial:
http://sharepoint-videos.com/products/visualsp/visualsp-video-showcase/#CustomHelpTabItems

The contents of the Help tab can be overridden at the page level by using the VisualSP web part. This can be helpful if you wish to show certain Help items only on a specific SharePoint page.

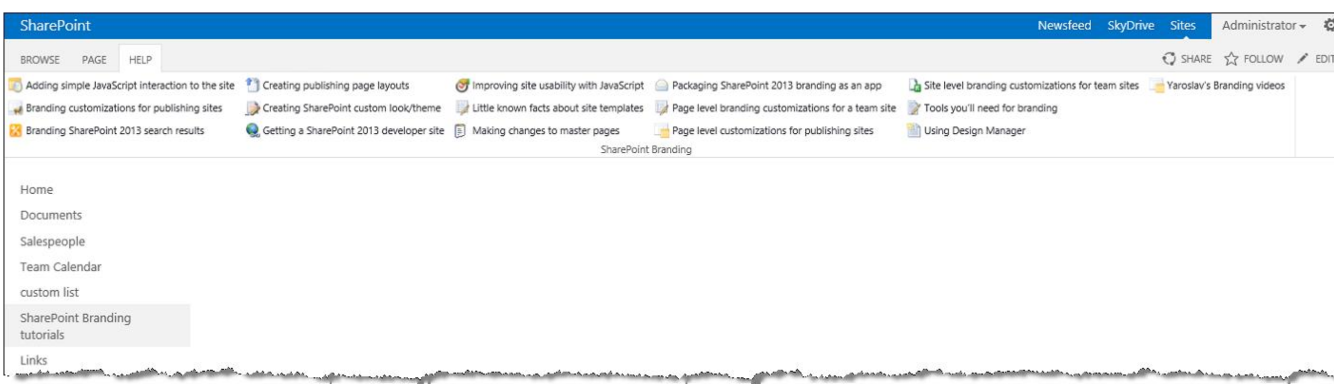
When the *Scope Key Value* is set in the VisualSP web part properties, the help content in the web part reflects that custom scope. The Help tab on that page still continues to show the content that's intended for that page. For example, the screenshot below shows the Help tab showing help content for a wiki page.



The content of the Help tab can be overridden with the Help items that appear in the VisualSP web part by checking the checkbox for **Override Ribbon Tab**. By doing this, all of the Help items in the web part will disappear and will be transferred to the Help tab.



The web part no longer needs to be shown on the page. You can hide the chrome (title and outline) of the web part by setting the *Chrome Type* to **None** in the *Appearance* section of the web part properties. This results in the page showing the Help tab with the Help items from the web part and the web part would no longer be visible on the page.



VisualSP Analytics

The VisualSP Analytics Reports available in VisualSP Enterprise provide a powerful insight into how users are interacting with VisualSP. A variety of reports and filters are available to provide the business intelligence you need to get the most value from context-sensitive help.

***Note:** VisualSP Analytics is only available in VisualSP Enterprise Edition.*

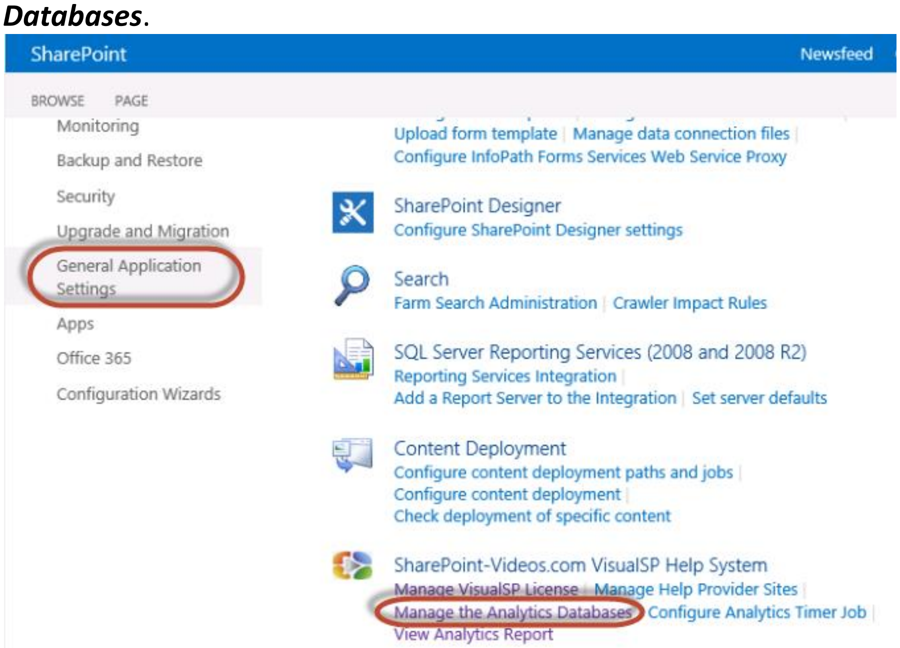
Setting Up and Configuring VisualSP Analytics

Each time a user interacts with VisualSP in some way (list some common interactions), the activity is logged in a Staging Database. A Timer Job runs on a schedule to process and aggregate the raw data in the Staging Database. It then stores this processed data in a Warehouse Database. The Analytics Reports are dynamically generated from the data in the Warehouse Database as requested.

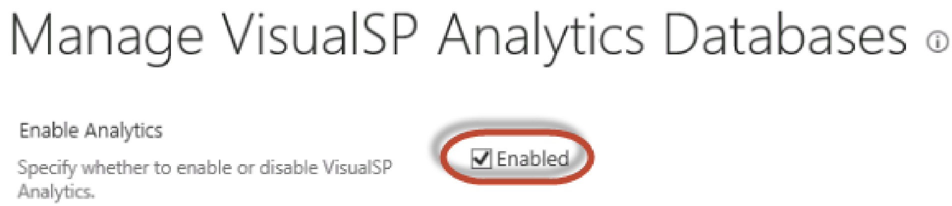
Before you can begin using VisualSP Analytics, the SharePoint server administrator will need to create the Analytics Databases and configure the Analytics Timer Job.

Create the Analytics Databases

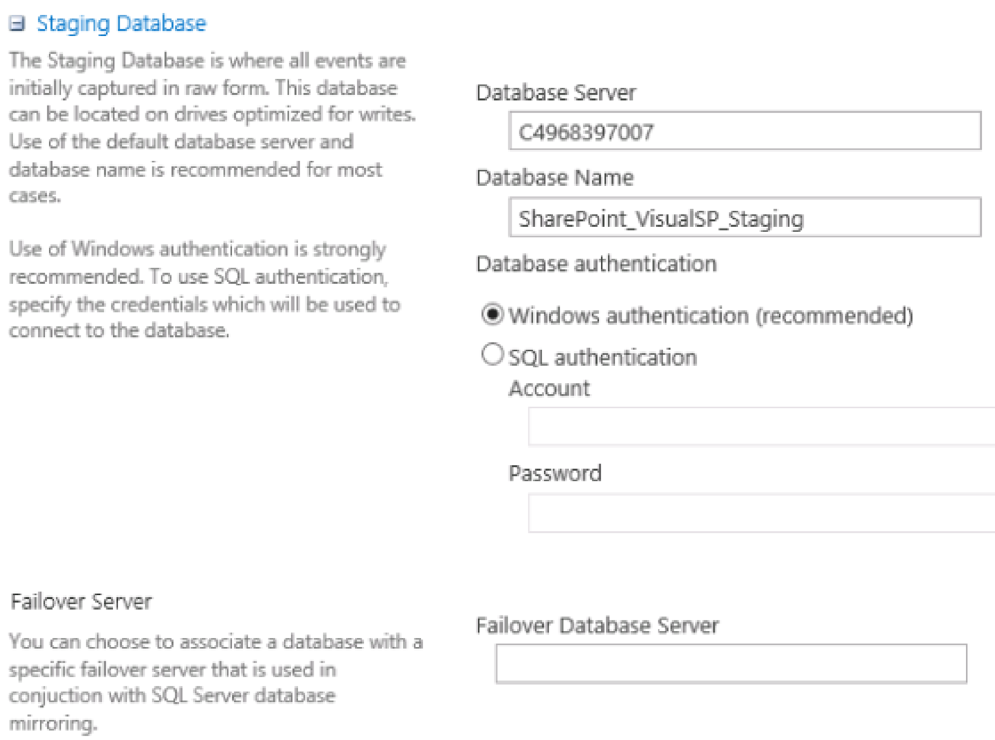
Log into **Central Administration** and click on ***General Application Settings***. Scroll down to the **SharePoint-Videos.com VisualSP Help System** section and click on ***Manage the Analytics Databases***.



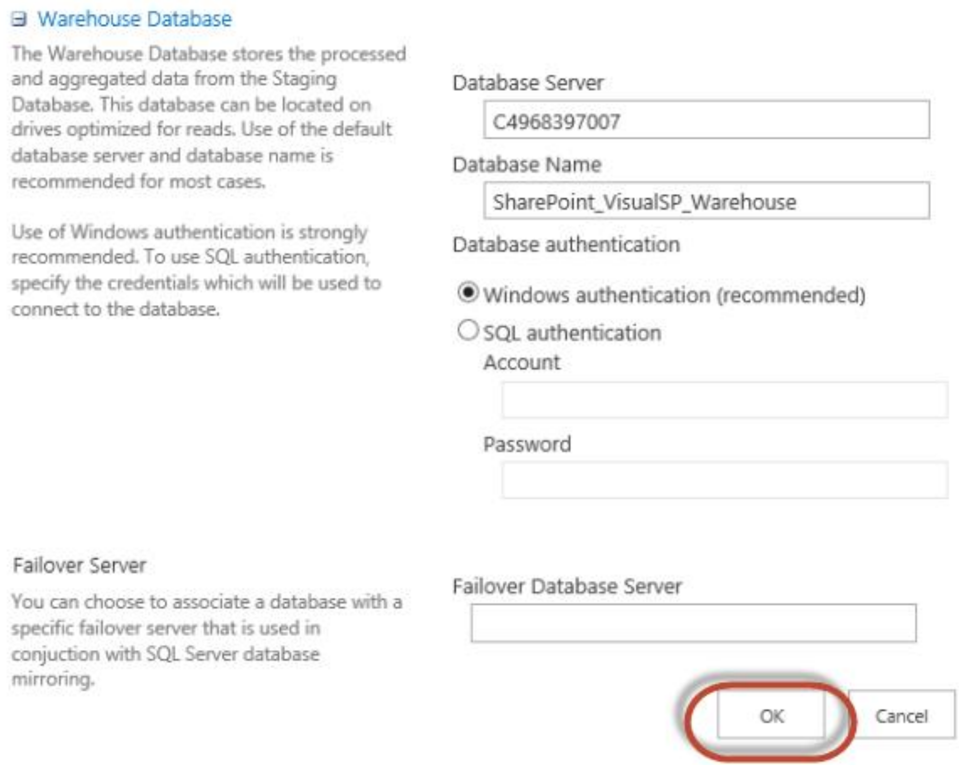
On the **Manage VisualSP Analytics Databases** page, in the **Enable Analytics** section, check the ***Enabled*** box.



In the **Staging Database** section, enter the name of the ***Database Server*** you want to use to store the raw data. This can be any SQL Server database that has drives that are optimized for *writes*. The default (and recommended) database server will be the SharePoint database server. Enter a ***Database Name***. This name must be a unique name on the selected Database Server. The default name of ***SharePoint_VisuslSP_Staging*** is recommended. Select the Windows Authentication or SQL Authentication as required by the selected Database Server; if you select SQL authentication, enter the SQL Account and Password VisualSP should use. If you use SQL Server database mirroring, enter the name of the ***Failover Database Server***.

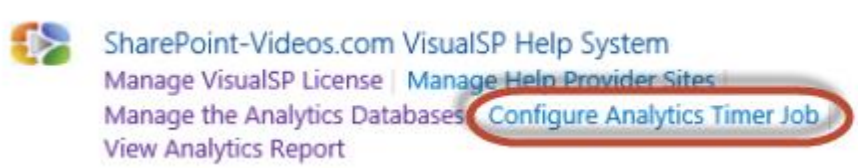


In the **Warehouse Database** section, enter the name of the ***Database Server*** you want to use to store the processed data. This can be any SQL Server database that has drives that are optimized for *reads*. The default (and recommended) database server will be the SharePoint database server. Enter a ***Database Name***. This name must be a unique name on the selected Database Server. The default name of ***SharePoint_VisuslSP_Warehouse*** is recommended. Select the Windows Authentication or SQL Authentication as required by the selected Database Server; if you select SQL authentication, enter the SQL Account and Password VisualSP should use. If you use SQL Server database mirroring, enter the name of the ***Failover Database Server***. When you are finished, click the ***OK*** button.

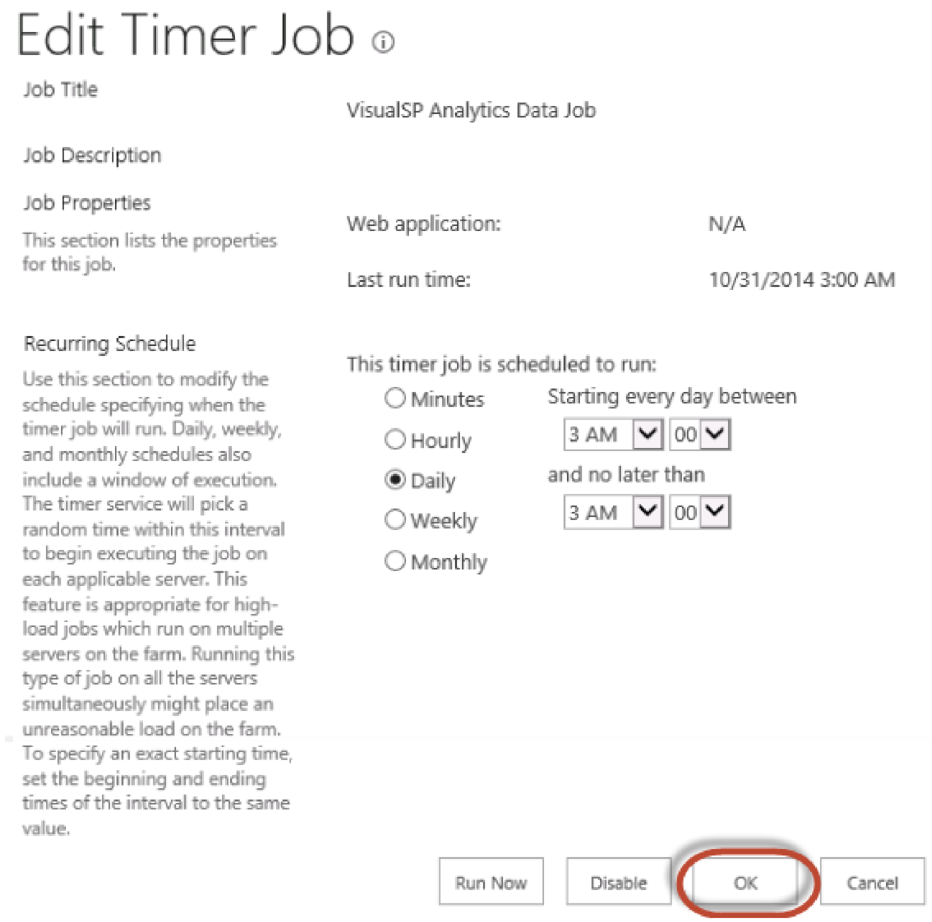


Configure the Timer Job

When the server finishes creating the necessary databases, click ***Configure Analytics Timer Job***.

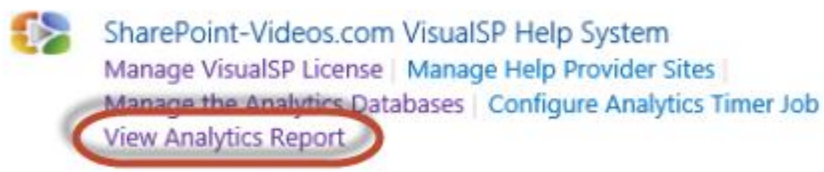


On the **Edit Timer Job** page, select the frequency and times you want the job to run. By default, it runs ***Daily*** at ***3:00am***. You can adjust this to whatever frequency and times meet your network and business needs. When you are finished, click the ***OK*** button.

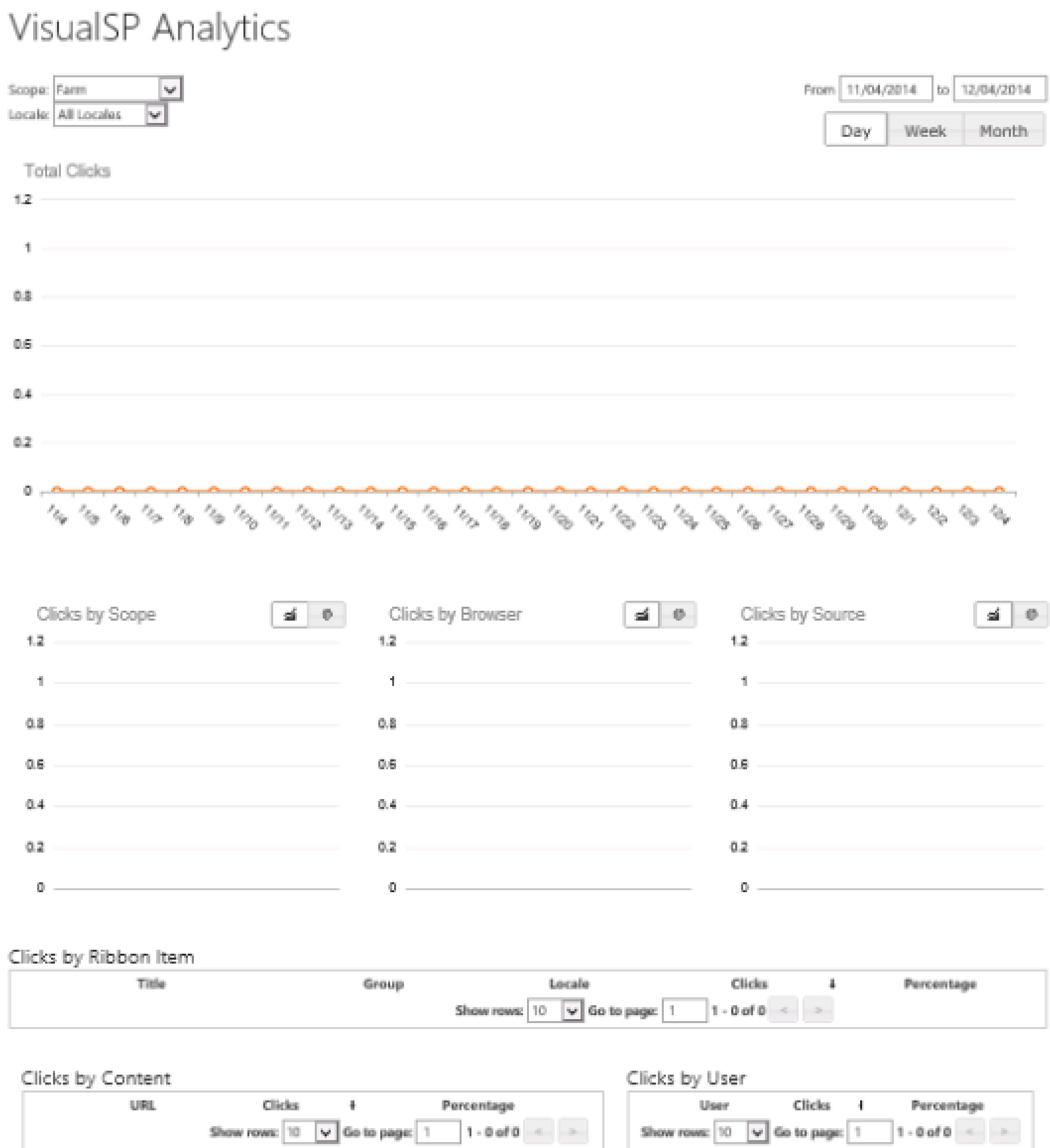


Test Setup and Configuration

Test that everything is configured correctly by clicking ***View Analytics Report***.



You should see the reports page with no data displayed.

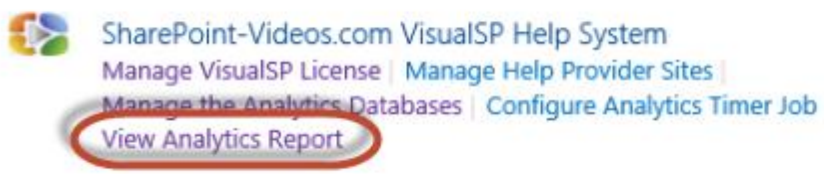


Visit a web site where VisualSP is used and click on a few of the help items in various places. When you are finished, return to the **General Application Settings** page in Central Administration.

Click ***Configure Analytics Timer Job***. On the Edit Timer Job page, click the ***Run Now*** button. Give it a minute to run and then click ***View Analytics Report.*** If everything has been configured correctly, you should see some data on the reports.

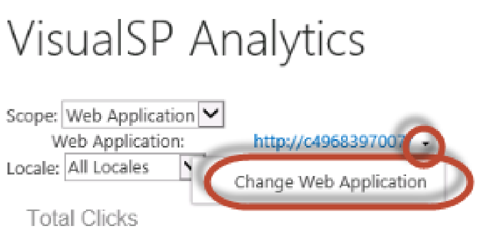
View Analytics Reports in Central Administration

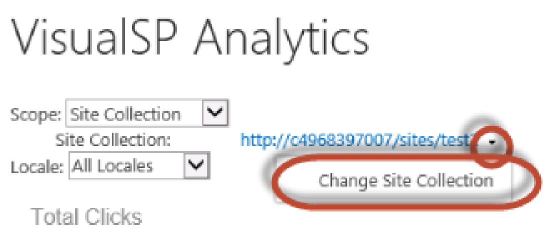
To view Analytics reports in Central Administration, click ***General Application Settings***. Scroll down to the **SharePoint-Videos.com VisualSP Help System** section and click ***View Analytics Report***.



The initial reports show results from the entire Farm. This can be changed to view results for any single Web Application or any single Site Collection. Simply select the **Scope** you need.

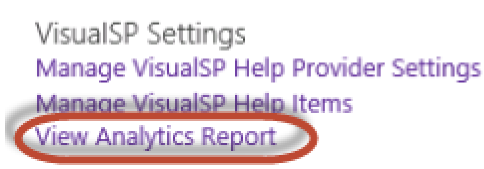
After selecting Web Application or Site Collection, you can easily select a different web application or site collection than the default.





View Analytics Reports in a Site Collection

To view Analytics reports in a site collection, in the site collection, click ***Settings (Gear icon) > Site Settings.*** Locate the **VisualSP** section and click ***View Analytics Report***.



Note: To access this option, the VisualSP Help Provider Feature must be activated on the site collection (under Site Collection Features). See [Exposing Specific Content at a Site Collection](#) for more details. It is not necessary for the site to have unique help items, it still inherit from the Farm Hub if desired.

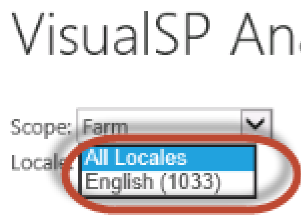
If you are in the site collection that serves as the VisualSP Farm Hub, the reports will show data for the entire farm. If you are in any other site collection, you will see only the data for that particular site collection.

Understand Analytics Reports

When you first visit the VisualSP Analytics page, the page shows data from all Locales for the previous month.

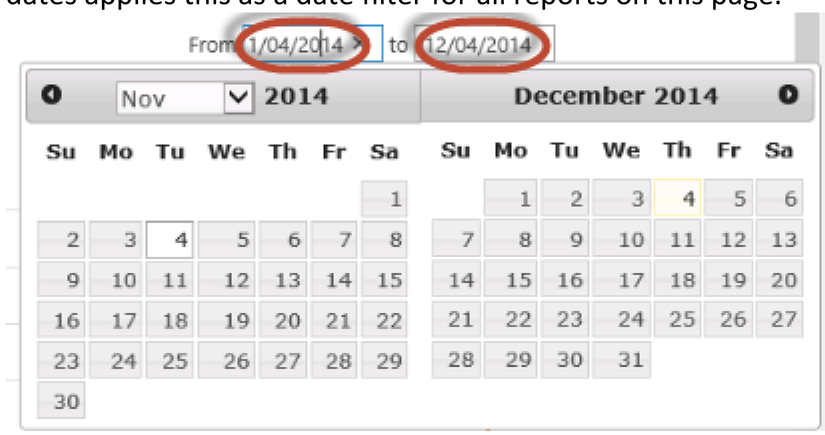
Locale

To filter the reports to show only results for a particular Locale, select the Locale from the drop-down menu. Changing the Locale applies the filter to all reports on this page.



Report Date Range and Date Grouping

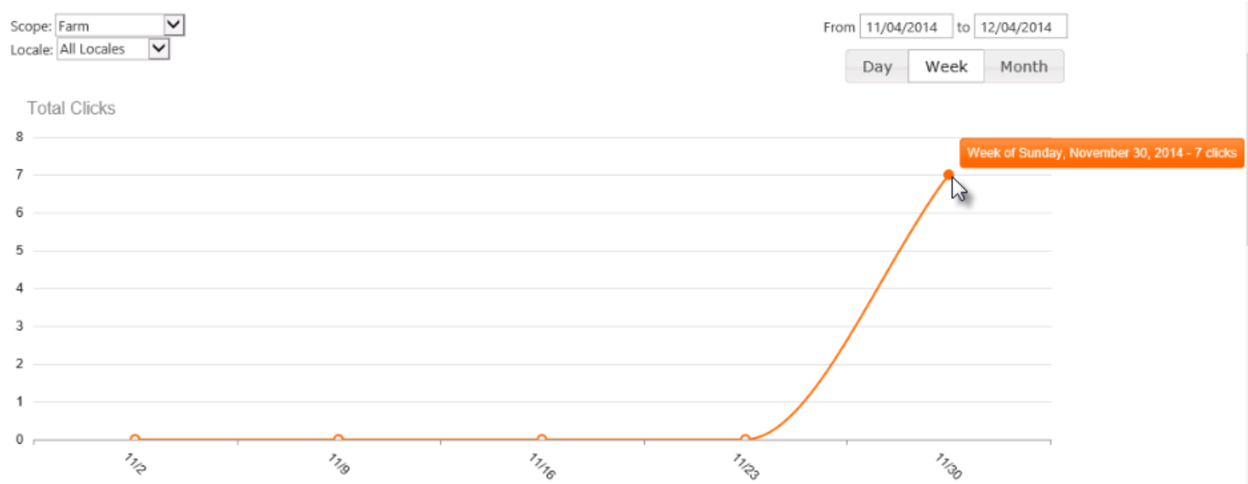
To see results for a particular date range, change the **From** and **To** dates. Changing the dates applies this as a date filter for all reports on this page.



The line graphs for **Total Clicks**, **Clicks by Scope**, **Clicks by Browser**, and **Clicks by Source** can display results aggregated by ***Day***, ***Week***, or ***Month***. Changing the aggregation scope at the top of the page applies it to all the line graphs on the page. Changing this options makes it easy to compare activity between different periods.

Total Clicks

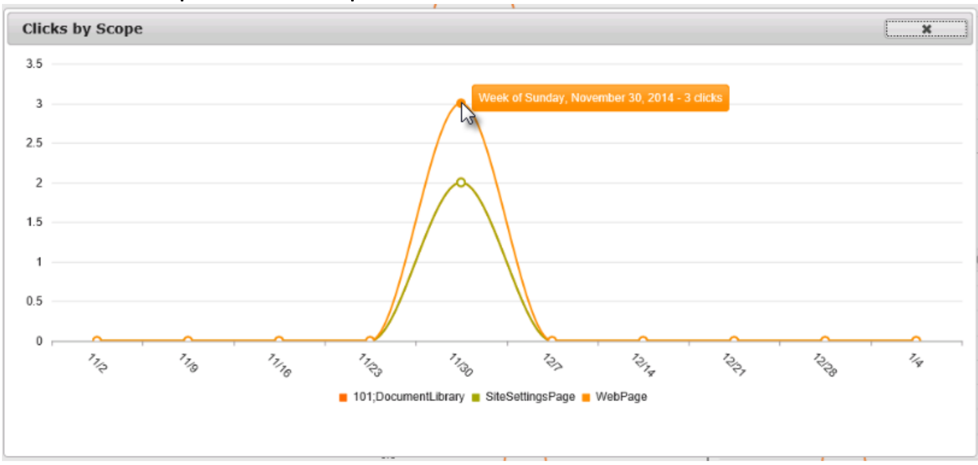
A line graph shows the total number of clicks on VisualSP help items for the selected Locale, Date Range, and Date Grouping. Move your mouse over any data point in the graph to see a description of that point's data.



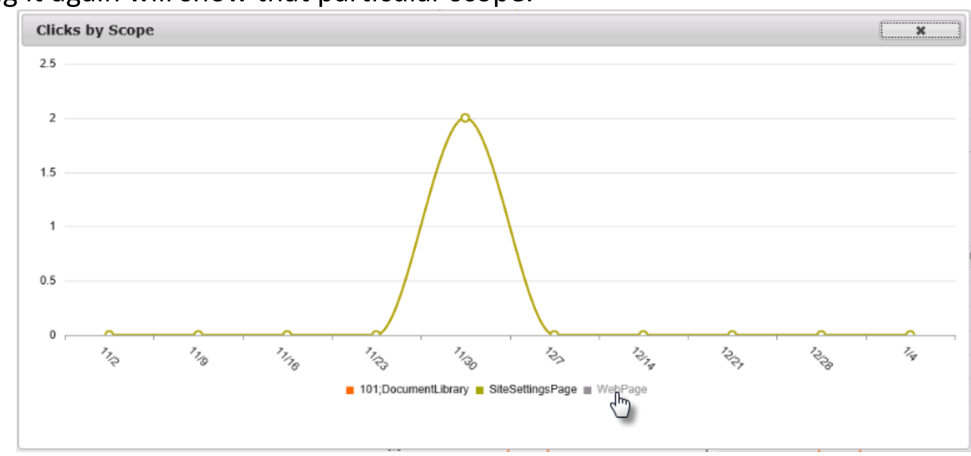
Clicks by Scope

A line graph shows the number of clicks on VisualSP Help items in each scope for the selected Locale, Date Range, and Date Grouping. Click on the Pie Chart icon to view a pie chart of the data for the selected Locale and Date Range.

Click on the title, ***Clicks by Scope*** to enlarge the graph. Move your mouse over any data point to see a description of that point's data.



Each line in the graph renders in a different color with a legend appearing below the graph. Clicking on a scope in the legend will hide that particular scope from the graph. Clicking it again will show that particular scope.

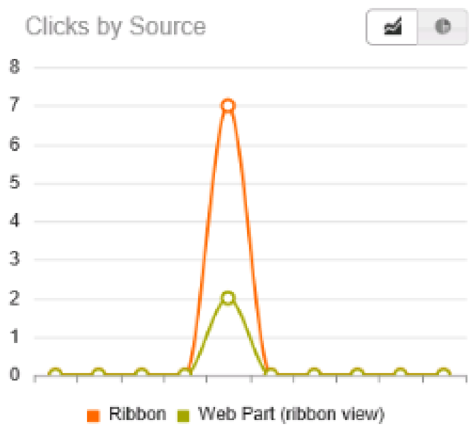


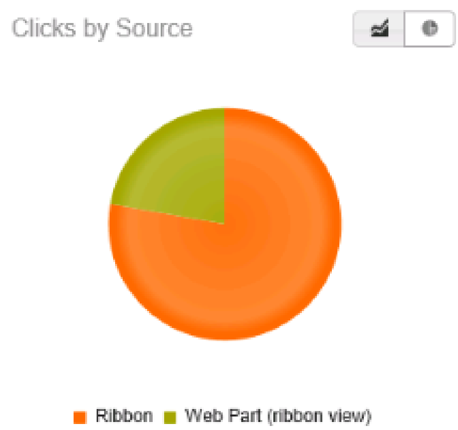
Clicks by Browser

A line graph shows the number of clicks on VisualSP Help items in each type of browser for the selected Locale, Date Range, and Date Grouping. You can view a pie chart, enlarge the graph, and show/hide data for particular browsers.

Clicks by Source

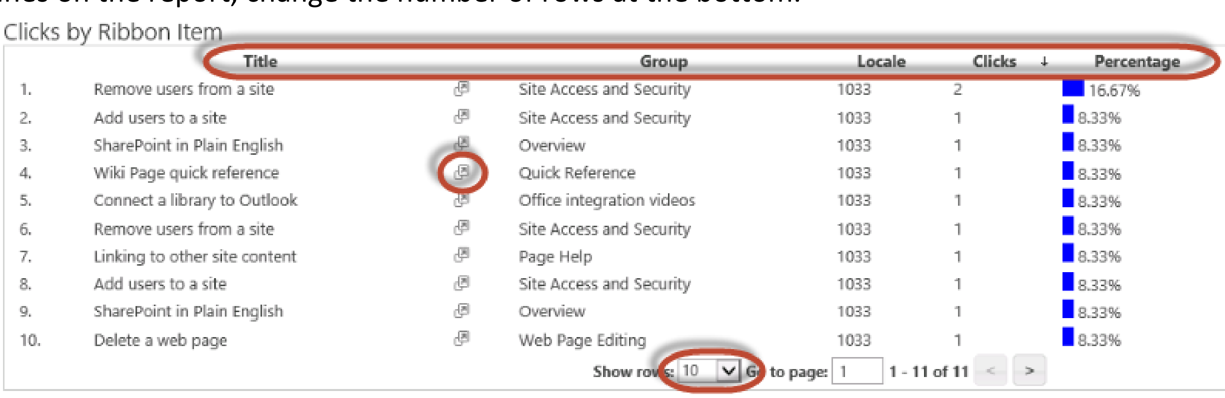
A line graph shows the number of clicks on VisualSP Help items by source (Ribbon or Web Part) for the selected Locale, Date Range, and Date Grouping. You can view a pie chart, enlarge the graph, and show/hide data for particular browsers.





Clicks by Ribbon Item

This report shows each help item that was clicked on for the selected Locale and Date Range. Clicking on the ***Open*** icon will open the help content (video, screenshot, document, etc…). Clicking on any column heading will order all the items in the report based on the values in that column; click it again to reverse the sort order. To see more lines on the report, change the number of rows at the bottom.



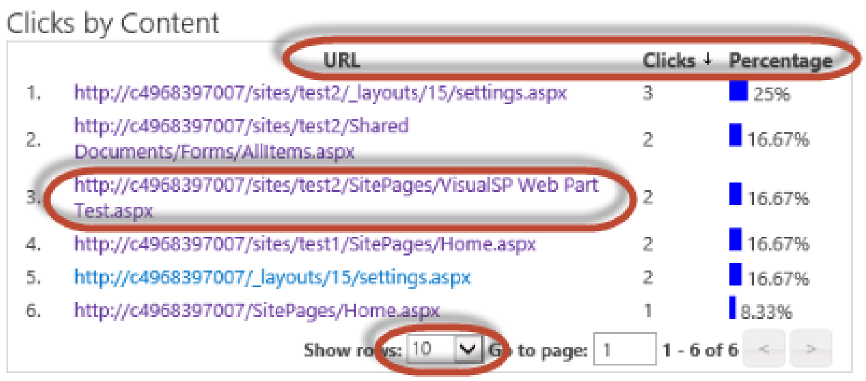
Clicks by Ribbon Item

	Title		Group	Locale	Clicks ↓	Percentage
1.	Remove users from a site		Site Access and Security	1033	2	16.67%
2.	Add users to a site		Site Access and Security	1033	1	8.33%
3.	SharePoint in Plain English		Overview	1033	1	8.33%
4.	Wiki Page quick reference		Quick Reference	1033	1	8.33%
5.	Connect a library to Outlook		Office integration videos	1033	1	8.33%
6.	Remove users from a site		Site Access and Security	1033	1	8.33%
7.	Linking to other site content		Page Help	1033	1	8.33%
8.	Add users to a site		Site Access and Security	1033	1	8.33%
9.	SharePoint in Plain English		Overview	1033	1	8.33%
10.	Delete a web page		Web Page Editing	1033	1	8.33%

Show rows: 10 Go to page: 1 1 - 11 of 11 < >

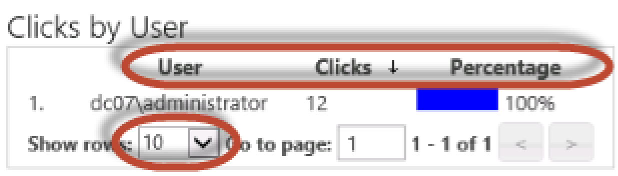
Clicks by Content

This report shows each page on which help items were clicked for the selected Locale and Date Range. Clicking on the URL will open that page in a new browser tab. Clicking on any column heading will order all the items in the report based on the values in that column; click it again to reverse the sort order. To see more lines on the report, change the number of rows at the bottom.



Clicks by User

This report shows each user who clicked on a help item for the selected Locale and Date Range. Clicking on any column heading will order all the items in the report based on the values in that column; click it again to reverse the sort order. To see more lines on the report, change the number of rows at the bottom.



Check out the latest functionality updates at the [VisualSP demonstration video showcase](#).