Infor CloudSuite Business Help Customization

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Chapter 1: Introduction

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Infor CloudSuite Business uses Web-based online help. Each help topic is a separate HTML file. For context-sensitive help, the application builds the path to the topic file by combining these three pieces of information into a URL and then displaying the resulting topic:

- Server and initial path information specified in the Configuration Manager
- Locale path information specified in the Language IDs form
- Topic path information specified in design mode for the specific forms and fields

Additional parameters can be appended to the end of the help URL.

If you have on-premises help, you can customize the help by creating your own HTML help files and placing them in the proper folders on the utility server. Then you can link a custom field or button in CloudSuite Business to those help topics.

Note: Although it is possible to make changes to the standard CloudSuite Business help topics, we recommend you do NOT add your custom help content in this manner. Our files might be revised and replaced at any time, which means your changes would be overwritten. In addition, remember that our text is copyrighted. Please follow the procedures described in this document to create and link your custom help content.

This document covers the following topics related to customizing the online help.

- Understanding the help system structure and location
- Installing your help in the proper place on the utility server
- Linking a context-sensitive help topic to a custom form or a user-defined field in the application
- Testing the context-sensitive help

Chapter 2: Help structure and location

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This chapter describes the files we use in our two-frame context-sensitive help system with various "skins." You can create a similar structure for your help system, or you can skip the use of the table of contents and/or search features. Or you can just link single topics to your custom forms or fields without displaying a second frame for the contents/index/search.

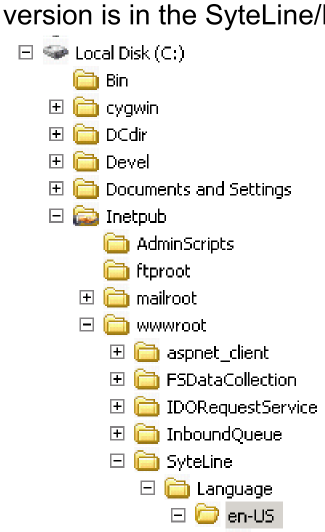
In any case, you must store your files in a subdirectory of our existing help directory, so that the application can find them.

Help system location

Our help files can be stored on-premises or in the cloud.

Default location of help files on-premises

By default, our on-premises help files are located on the CloudSuite Business utility server, in an IIS virtual directory called SyteLine in Language/*culture* subdirectories. For example, the US English version is in the SyteLine/Language/en-US folder:



This folder contains files that are used to display the help, as well as subfolders that contain the actual topic files.

Translated help files

By default, when the culture is set in the application, the application looks for the appropriate translated help in the help subdirectory for that culture, as defined in the Language IDs form:

Language IDs

	Language ID	*Code	*String Table Name	Description	Help Sub Dir	Override Middle Help URL
1	es-AR	ESS	ArgentineanStrings	Spanish (Argentina)	es-AR	
2	pt-BR	PTB	BrazilianStrings	Portuguese (Brazil)	pt-BR	
3	bg-BG	BGR	BulgarianStrings	Bulgarian (Bulgaria)	bg-BG	
4	fr-CA	FRC	CanadianStrings	French (Canada)	fr-CA	
5	es-CL	ESL	ChileanStrings	Spanish (Chile)	es-CL	
6	es-CO	ESO	ColombianStrings	Spanish (Colombia)	es-CO	
7	cs-CZ	CSY	CzechStrings	Czech (Czech Republic)	cs-CZ	

This is a subfolder under the Languages folder described earlier.

If no help files exist in the culture subfolder, and the application is running in a “smart” client, the default English help is displayed. However, in the web client, no redirection to the English folder occurs. Therefore, make sure that the User Preferences default language is set to a language for which help has been installed.

Alternatively, you can use the Override Middle Help URL field to specify a culture subfolder other than language/*help_sub_dir*.

Where to place your custom help files

If you plan to keep your custom help system separate from the CloudSuite Business help system, place your custom help files in a subfolder under the culture level so that the application can find them.

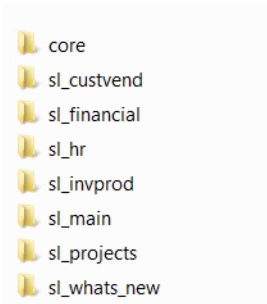
For example, you might create a subfolder under SyteLine/language/en-US called MyHelp.

If Infor help is in the cloud

If the standard application help files are installed in the cloud and not on-premises, then you cannot add context-sensitive custom help topics, because the application is looking for help files on docs.infor.com, and you cannot store files in that location.

Help system files and folders

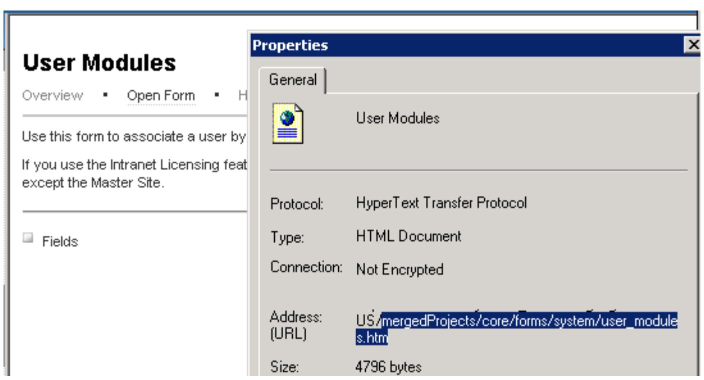
We use a content management system and DITA tools to build our HTML help topics. Our help system folder on the utility server consists of a set of merged help modules. The form and field topics for each module are stored in the mergedProjects subfolder under language/en-US in folders such as these.



Overview and task topics are stored at the root folder level.

Finding the location and file name of a help topic

To find the folder location and file name of a given topic in the CloudSuite Business help, open the CloudSuite Business help and display the help topic. Right-click in the help browser and choose **Properties**. Look at the path information in the **Address (URL)** field, as shown below.



Javascripts, CSS files, and skins

Our topic files include links to a cascading style sheet (CSS) and javascripts and skins. We do not recommend that you use these files in your help, because the setup is very complex.

Start page

The CloudSuite Business default.html start page redirects to the parent help project’s start page and processes any help parameters that were passed in the URL.

The parent project’s start page loads the appropriate topic right frame. Initially the "About This Application" topic is displayed in the right pane.

The left pane displays the table of contents and search options.

Chapter 3: Loading the help on the utility server

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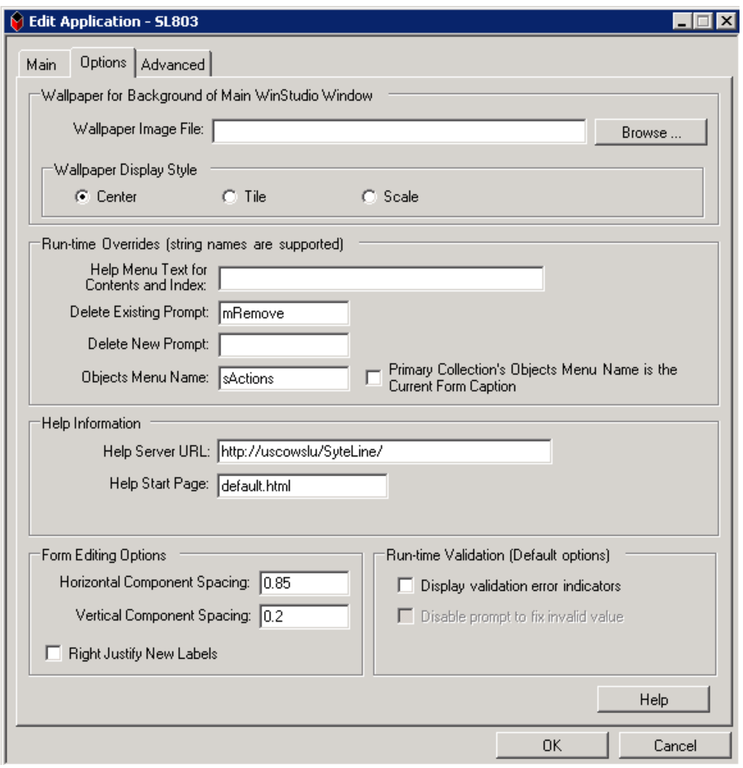
Setting up CloudSuite Business to find your help

The CloudSuite Business utility server should already be configured (through the Configuration Manager) to find the CloudSuite Business help using a URL and start page similar to this:



You should not have to change these settings if your help is placed in a subfolder under this virtual directory so the application can access it. This location is described on page 7.

Installing your help on the utility server

Copy the files from your help root source folder, including all subfolders, into your custom help folder on the utility server under the c:\inetpub\wwwroot\SyteLine\language*culture* folder, where *culture* is the appropriate Microsoft culture, for example en-US.

Chapter 4: Creating and testing context-sensitive help

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To set up context-sensitive help in CloudSuite Business, you must edit the form or component properties in order to specify the filename and path of the matching help topic. This information is stored in the Forms (for form-level topics) and FormComponents (for component-level topics) tables of the Forms database.

This section describes how to set up the information. The process is the same if you are adding this information for user-defined fields.

Adding help context-sensitivity to a form or component

1 Open CloudSuite Business and navigate to the custom form, or to the form on which your user-defined component is located.

2 Enter design mode.

3 To define *form-level* help, open the form's property sheet.

  To define help for a *component*, select the component and open the component's property sheet.

4 In either the form or component property sheet, scroll down to the help section:

5 For the **Help Context ID** property, specify **-1**. This indicates that you are using Web-based help.

6 For the **Help File Name** property, specify the relative path to the HTML help topic file. Include your help folder path, followed by either your topic file name or your start file name and any bookmarks or parameters:

- If you are not using a two-frame setup - that is, you do not have a left frame displaying contents/search - just place the topic file name after your help folder path. For example:

MyHelp/fields/j/job_orders.htm

- If you are using frames to display context/index/search in the left pane, you will have a "start" file that sets up the frames. Specify that start file name, followed by either a pound sign (#) to indicate a bookmark or a question mark to indicate a parameter, followed by the rest of the relative path to the HTML file. For example:

  MyHelp/start.htm#fields/j/job_orders.htm
  or
  MyHelp/default.html?fields/j/job_orders.htm

  Either syntax works. We use a start page named "default.html" that allows us to specify the topic filename as a parameter, followed by other parameters that are handled by our default.html page. (See “System-generated parameters," below.) If your help system does not require additional parameters, use the first syntax specified above.

7 Save the changes to the form and exit Design Mode.

Building the URL

The application takes the path you specify in design mode and appends it to the help server URL specification, plus the appropriate language/culture folder. It then appends any system-generated parameters after the path. Using the MyHelp example, the full path that displays in the help browser might look like this:

http://*utilityserver*/SyteLine/Language/en-US/MyHelp/start.htm#fields/j/job_orders.htm

Remember that "SyteLine" is a virtual directory on the utility server; the real directory path to the topic file is something like this:

c:\inetpub\wwwroot\SyteLine\Language\en-US\MyHelp\fields\j\job_orders

Default.html

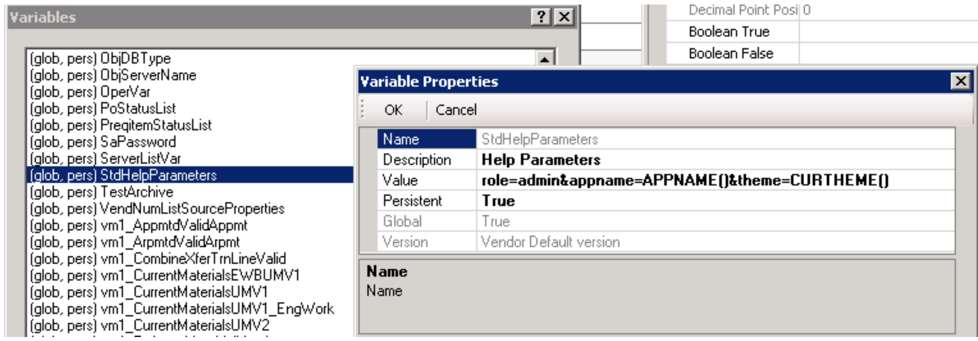
CloudSuite Business help uses a special start page called default.html. This file expects to receive a URL that contains a set of parameters (including the path to the help topic) which start with a question mark (?), for example:

?helpcontent=mergedProjects/core/fields/r/reason_code.htm

The default.html file replaces the ? with a #, builds the appropriate URL and redirects to the start.htm file. Using the ? allows us to include additional parameters.

System-generated parameters

Additional parameters can be passed to the help system through the StdHelpParameters variable. You can define this (in Design Mode) as a global persistent variable and pass parameters such as the substitution keywords APPNAME() and CURTHEME(). Parameters are inserted as *name=value* and must be URI encoded if necessary.



If you pass parameters, your help system's start page must contain custom coding to parse these parameters and handle them.

The application appends these parameters to the help URL, either with a question mark (?) if there are no other parameters, or with an ampersand (&) if a ? parameter already exists in the URL. In the case of CloudSuite Business help, the help URL could contain both the file path parameter and the additional parameters, like this:

http://*utilityserver*/SyteLine/Language/en-US/?helpcontent=mergedProjects/core/fields/r/reason_code.htm&**appname=SyteLine&themename=inforBlue**

Defaulting form-level help to fields

If a form has context-sensitive help assigned to it, and some components on that form do not have context-sensitive help assigned, the help calls from those components will default to displaying the help topic assigned to the form.

Testing your custom help

If your help files are already loaded on the utility server, you should be able to test your changes on the form immediately.

Testing form-level help

1 In CloudSuite Business, open the form where you added the help property.

2 Select **Help > Current Form**. The proper help topic should display.

3 Also test the F1 and right-click help functions to be sure they are working properly.

Testing field- or button-level help

1. In CloudSuite Business, open the form where you added the field/button help property.
2. Select the field or button where you added the help property.
3. Select **Help > Current Field**. The proper help topic should display.
4. Also test the F1 and right-click help functions to be sure they are working properly.

About CloudSuite Business service packs and upgrades

During an upgrade or when applying a service pack, you can use the FormSync utility to convert your custom forms or objects for use with the new version or the application. Before you use the FormSync utility, perform these steps to preserve your custom context-sensitive help:

1. Perform a SQL backup of the rows for your custom help topics in the Forms and FormComponents tables (perform a SQL query on your custom help folder name to find the appropriate rows).
2. Run the FormSync utility as described in the *Infor CloudSuite Business Installation Guide* and in the online help for FormSync.
3. After running FormSync, import the appropriate rows for your custom help topics back into the new Forms and FormComponents table.

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