Infor SyteLine Help Customization

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Chapter 1: Introduction

1

Infor SyteLine uses Web-based online help. Each help topic is a separate HTML file stored on the utility server. For context-sensitive help, the application builds the path to the topic file by combining information entered in the Configuration Manager with information entered in design mode for the specific forms and fields, and then displays the topic. Additional parameters can be appended to the end of the help URL.

You can customize the online 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 SyteLine to those help topics.

Note: Although it is possible to make changes to the standard SyteLine help topics, we recommend you do NOT add your custom help content in this manner. Our files may 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

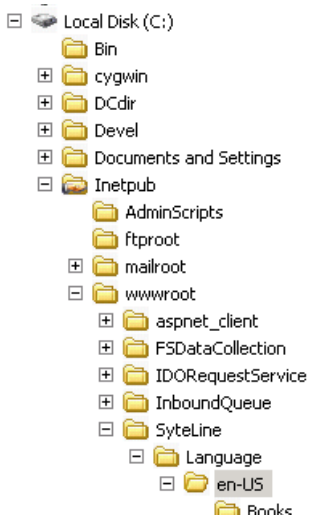
2

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 index, table of contents, and/or search pages. 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 are located on the SyteLine 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:



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

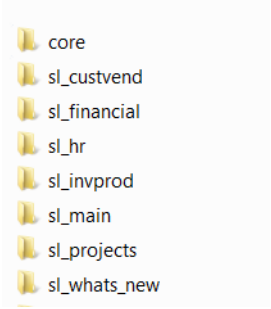
Where to Place Your Custom Help Files

If you plan to keep your help system separate from the SyteLine help system, store 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 en-US called MyHelp.

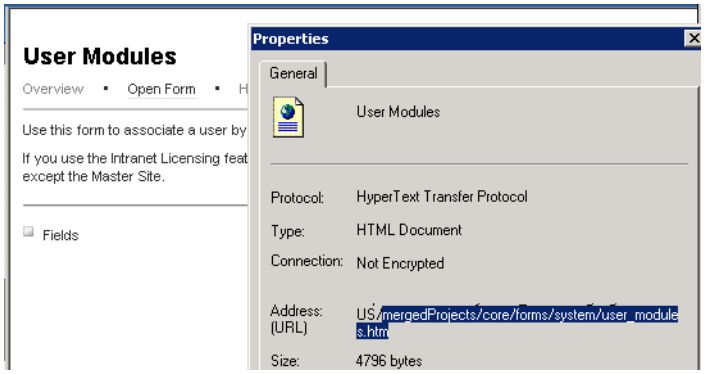
Help System Files and Folders

We use Adobe RoboHelp to build our help system. Our help system folder on the utility server consists of a parent project and a set of merged child projects. The child projects are stored in the mergedProjects subfolder under en-US. For SyteLine, the child project folders include modules such as these.



Finding the Location and File Name of a Help Topic

To find the folder location and file name of a given topic in the SyteLine help, open the SyteLine help and find the help topic you want to link to. Right-click in the help window and choose **Properties**. Look at the path information in the **Address (URL)** field, as shown below.



Javascripts, CSS Files, and Skins Used by the Topic Files

Our topic files include links to a cascading style sheet (CSS) and a javascript file that reside in each child project. If you want your topics to look like ours, you will also need to link to these files.

Integrate these files and folders into your help project.

- slhelp.css
- slhelp.js
- tree.js
- highlight.js
- infor skins folder

Start Page

The SyteLine 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 "Basics" topic from the "core" child project is displayed in the right pane.

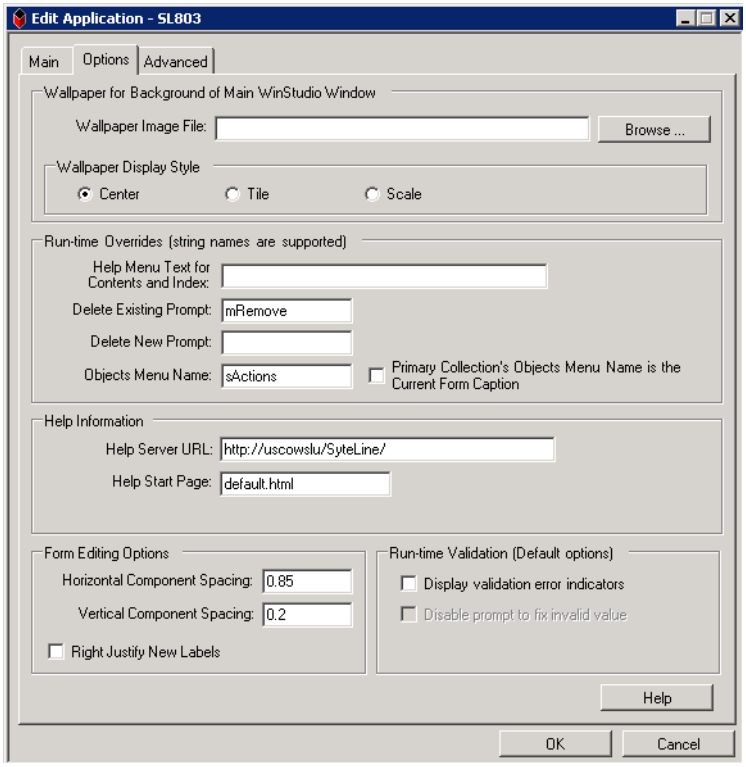
The left pane displays the merged table of contents, index, and search.

Chapter 3: Loading the Help on the Utility Server

3

Setting Up SyteLine to Find Your Help

The SyteLine utility server should already be configured (through the Configuration Manager) to find the SyteLine 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.

The **Help Sub Dir** field on the Language IDs form specifies the language subfolder from which SyteLine calls help for each language setting. For example, you can set the user interface strings to display from one language folder, but run the help from another language folder.

Chapter 4: Creating and Testing Context-Sensitive Help

4

To set up context-sensitive help in SyteLine, 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 SyteLine and navigate to the custom form, or to the form on which your user-defined component is located.

2 Select **Edit > 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/index/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

SyteLine 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:

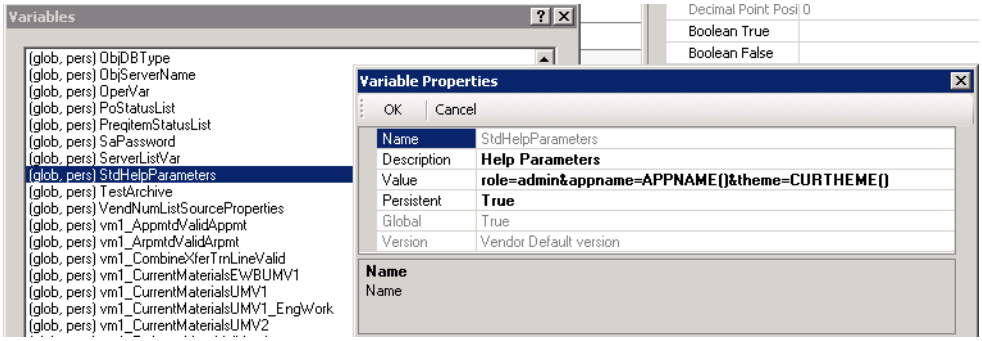
?helpcontent=mergedProjects/core/fields/r/reason_code.htm

The default.html file replaces the ? with a #, builds the appropriate URL and redirects to the parent module’s 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 SyteLine 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.

To Test Form-Level Help

1 In SyteLine, 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.

To Test Field- or Button-Level Help

1 In SyteLine, 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 SyteLine Service Packs and Upgrades

During an upgrade or when applying a service pack, you may 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 SyteLine 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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