

Customize Help for the Infinity Platform Guide

Blackbaud CRM Customize Help for the Infinity Platform US

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CustomizeHelp

# Customize Help for the Infinity Platform



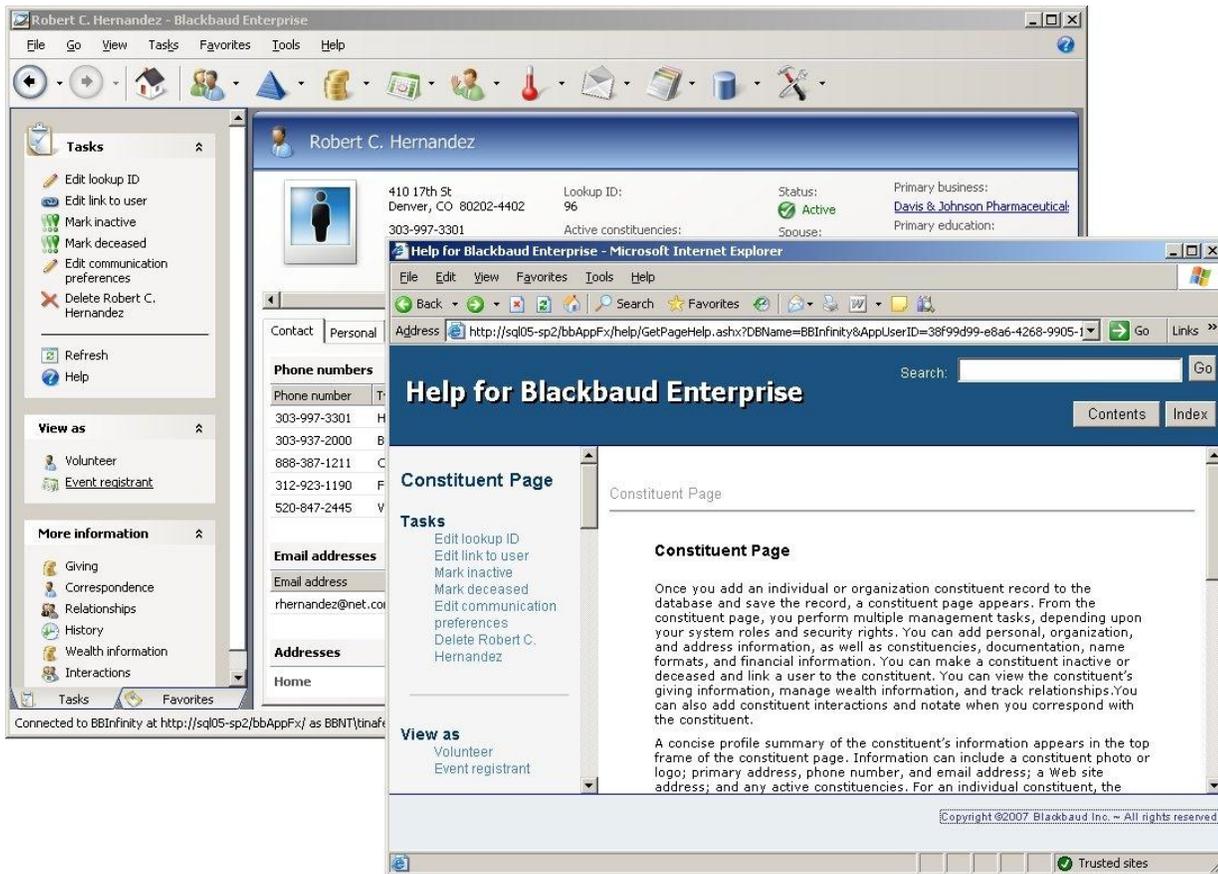
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The Infinity Platform ships with more than 4000 HTML help topic files for the products. If you want to modify the contents of the help file, there are a few things to consider. But first, it is important to understand some of the basics about the help file and how the navigation is generated.

## Basics of Infinity Help Files

The help files for the Infinity Platform consist of two main components: contents and navigation. Depending on the topic type—whether it is for a page or a form—the navigation information provided is different.

The contents area contains the help file topic. The navigation on the left is automatically generated by the platform for pages in the program. It is based on what tasks are available for the user who access help. Help for forms in the program do not have the navigation information on the left.



The help file navigation mimics the explorer bar in the program. **Tasks** and **View as** information in the program create similar links to those topics in the help file.

Breadcrumb navigation is also created to assist in navigation. Help topics for forms in the program do not have navigation information on the left, but do have the breadcrumb navigation. Breadcrumb links always point to the out of the box topics. So if you modify out of the box content, you should make a copy of the topic and rename it.



These different navigation links are automatically generated and are “wrapped” around the out of the box topics.

# A Standard Approach to Customization

The easiest way to customize the help file is to add new topics that are picked up in searches. The best practice is for this content to be in HTML format, which makes the user experience more consistent.

**Note:** When you make any customizations to the help file, an end user may have to exit help before changes appear. Also, new content added is not available until the server has the bandwidth to reindex; it will then run the indexing service and pick up the new files.

## Create HTML Content From MS Office Files

The process of creating HTML content from MS Office files is relatively straightforward, though there are some things to consider.

### What type of source files are you working with

Different file types look different when saved as HTML. Experiment with the various file types (such as Word documents, Excel spreadsheets, PowerPoint presentations) to see how each one looks when saved as HTML. Depending on the output, you may choose to use another program as the source file. For example, Excel content that is wider than a standard page will still be wider than an HTML page, so horizontal scrolling would be needed. However, if you can convert this information from Excel into a Word table first, it is easier to see what “fits” into the width of a page. You can then make any necessary adjustments to the table.

### Is your file more than one “page” long

Consider breaking it down into related chunks of information. A 20-page internal policies guide covering every area of the program may be more useful in the help file as individual program-area-based topics, such as “Internal policies for Events” or “Internal policies for revenue acknowledgment.” If it is all one page, keep in mind the user will have to scroll. Consider adding bookmarks or links at the top of the topic to link to subsections within that same topic to help with navigation.

### What is the title of the document

Enter an appropriate title for your source file under **File, Properties**. This title is displayed as the topic name in the search screen.

### Are there relevant keywords

Keywords information, under **File, Properties** in the source file, is also displayed in search results, but is not used during the search itself. You may want to remove them altogether or set up guidelines to use them consistently.

### Is the file name meaningful

Make sure each file name is something meaningful so it can help identify the contents of the file. The search engine does not look at the file name, but it will be easier to identify the new topic and information. However, make sure the file name is not something currently in use as an out of the box help topic file name. You should also NOT try to follow the naming convention established for out of the box help topics so that your custom file names will never be ones that become used by—and therefore overwritten by—out of the box topics. Consider

using a unique prefix for all custom file names, such as the organization's name. For more information, see *Take Help File Customization a Step Further* on page 5.

### Is the first line of content relevant

Search is based on the actual contents of the file. A relevant first line in each topics helps provide more accurate search results. Search also considers headers and footers—any information in those is also included in the search.

#### ► Convert MS Office files to HTML

1. Open the MS Office file in its original program. For example, open a .doc file in Word, .ppt file in PowerPoint, and so on.
2. Select **File, Save As** from the menu bar. The Save As screen appears.
3. In the **Save in** field, select an empty directory or create a new directory for this file.

**Note:** When you save a file as HTML, a subfolder for graphics and associated items is automatically created in the existing directory. To make sure you know what files specifically are part of the new HTML file, it is easiest to save the HTML file in a new or empty directory.

4. In the **File name** field, enter a file name that describes the content of the document.
5. In the **Save as type** field, select “Web Page (\*.htm, \*.html).”
6. Click **Save**. The MS Office document now has an HTML version. You can open that HTML version in a browser to see how it looks and functions.

## Add New Topics to the Help File

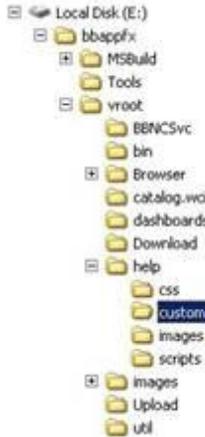
This is the easiest, most straightforward way to include custom information in the Infinity help file. Adding files this way enables their content to be included in searches of all help content.

#### ► Add a new topic

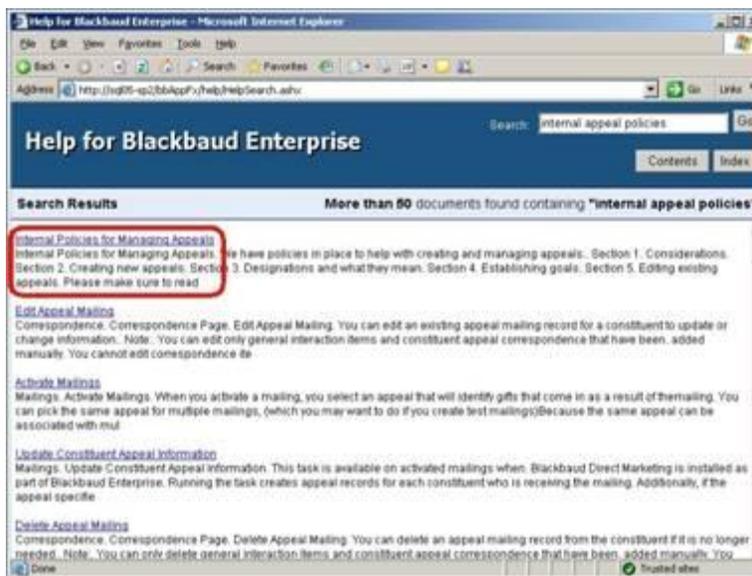
1. On the server, open the bbappfx folder.

**Note:** These folder names are the ones used by default during the installation.

2. In the vroot folder, open the help folder. The help folder contains all the existing help topic html files, as well as supporting files found in the css, images, and scripts folders.
3. Create a new subfolder called “custom.” This custom folder is where additional help content can be placed. Everything in the help folder is automatically included when the indexing service runs.



- In the custom folder, add any additional files and associated subfolders you want to be available using search functionality in the Infinity help file. The next time the server has the bandwidth, it will run the indexing service and pick up the new files.



## Take Help File Customization a Step Further

The next level in customizing help files is to change the topic associated with a given page in the program from the out of the box topic to a custom topic.

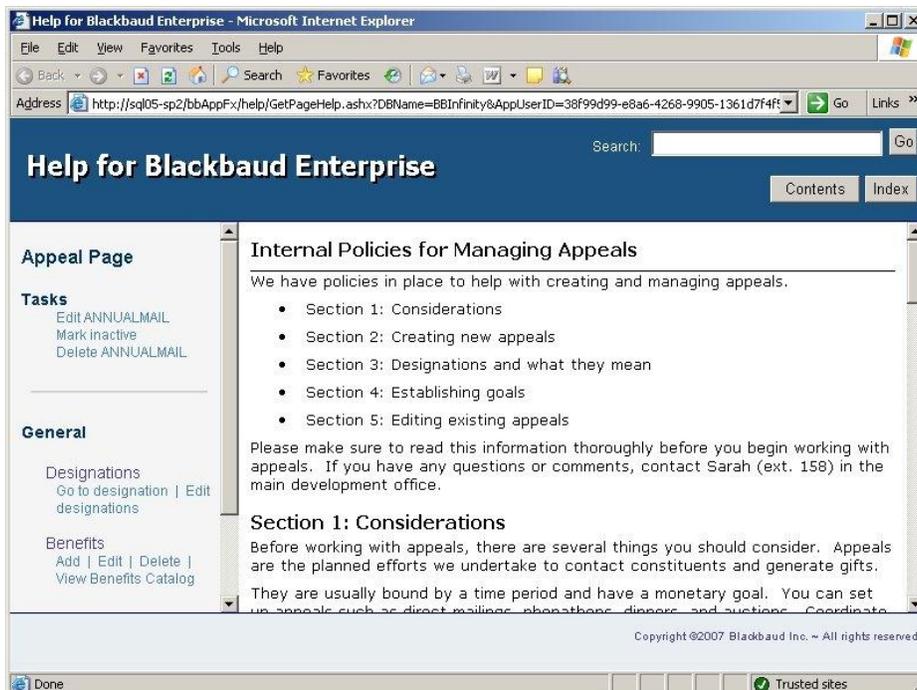
The custom content can then be accessed from the specific page in the program or by selecting the custom content from a help file search. The out of the box topic is still accessible from a help file search and is still called from help file navigation and inter-topic links.

**Note:** Help topics are the same for every user in the system. If you make a change to a topic, all users see that modified or new topic. Also, help topics are not specific to different records in the program. Accessing help from the Annual Mailing appeal, for example, brings up the same topic as when you access help from any other appeal record in the program.

The out of the box help topic is accessed by clicking the help icon on the explorer bar for a page or by clicking the help icon on a form.



You may want to change the out of the box help topic to be a custom topic, such as one about internal policies and procedures related to appeals.



The out of the box topic still exists and is still accessible by search or from other links within the help file. The custom topic is now accessed by clicking the help icon on the explorer bar for a page on an appeal or by searching the help file.

► **Make a custom topic the default topic to display from a page in the program**

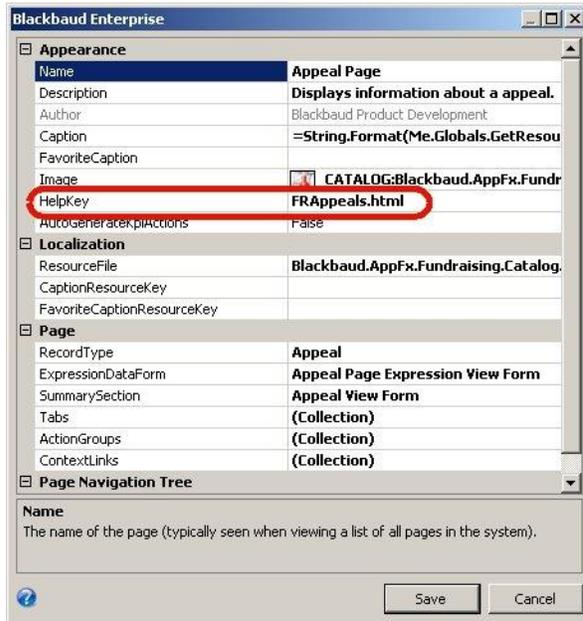
1. Place your custom content HTML file in the “custom” directory on the server.



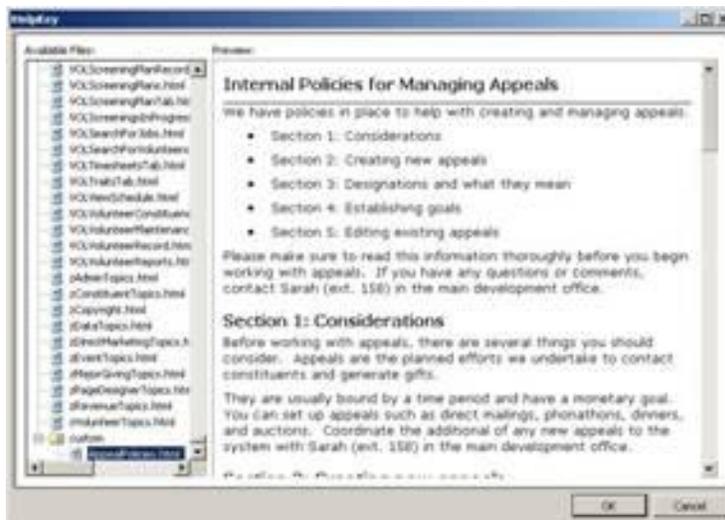
2. In the Infinity application, go to a page from which you want to call the custom topic you created. In this example, go to an appeal record.
3. Select **Tools, Design mode** from the menu bar. The appeal record now appears with page designer tools visible.



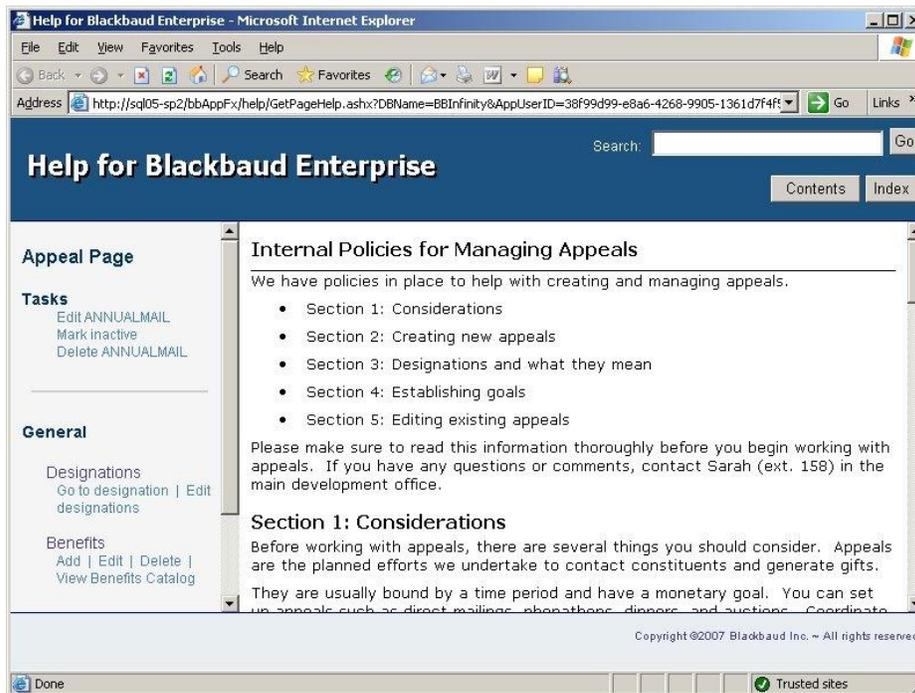
4. Click **Page Properties** at the top of the appeal record. The properties screen appears.



- In the grid, modify the HelpKey to point to the custom topic you created. Click the ellipses button to search for and select the topic you placed in the "custom" folder. The program now calls the custom help topic.



- From an appeal record, click the help icon on the explorer bar. The custom topic appears. The navigation links on the left are automatically generated and still point to out of the box content. If you navigate away from this new custom topic in the help file, you will not be able to return to it using automatically generated links or breadcrumbs. You can use the back button, use search, or return to an appeal record and access help again.



## Customize Out of the Box Topics

Beyond having a custom help topic called from the program instead of an out of the box topic, you can customize the out of the box topics.

**Note:** When you update the program, the installer copies all help files to the help folder. This overwrites any files with names that match the out of the box help topics. To maintain your custom help content, we recommend that when you modify an out of the box help topic, you save a copy with your unique file name. If the file names are unique, the update process will not overwrite your custom help content.

### ► Edit an out of the box topic to add a link to custom content

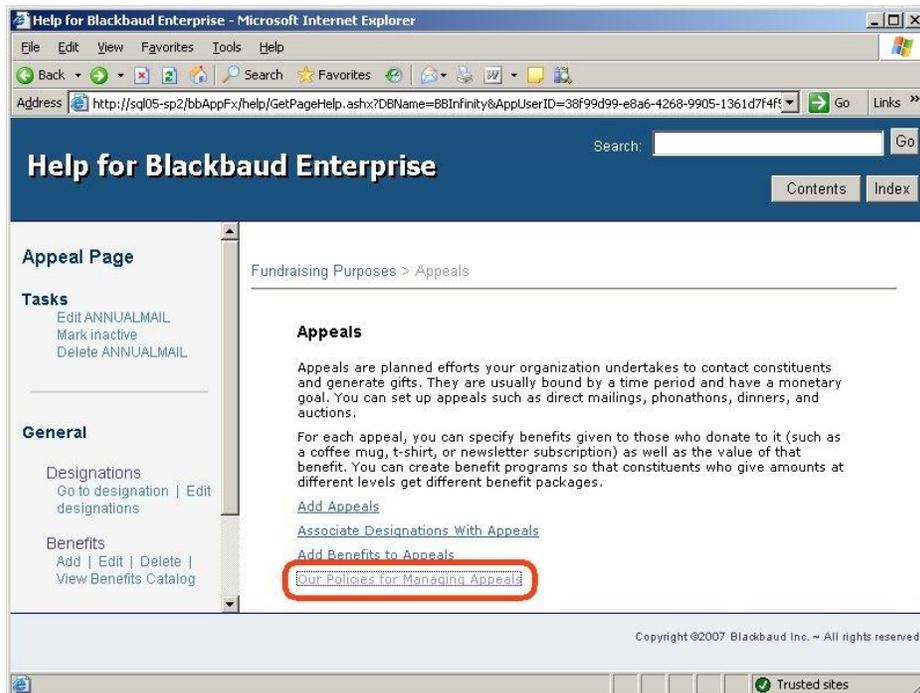
1. On the server, open the bbappfx folder.

**Note:** These folder names are the ones used by default during the installation.

2. In the vroot folder, open the help folder. The help folder contains all of the existing help topic HTML files, as well as supporting files found in the css, images, and scripts folders.
3. Create a new (or open the existing) folder called "custom." This custom folder is where additional help content can be placed. Anything in the help folder is automatically included when the indexing service runs.



4. In the help folder, place the custom content in the “custom” folder. In this example, you may want the main appeal topic to also link to an internal policy document, AppealPolicies.html. In this case, place the AppealPolicies.html file in the “custom” folder.
5. Locate and open the topic you want to modify, in this case FRAppeals.html, in an HTML editor. Add a link that points to the internal policies document. The link needs to be the full url to the file on the server. In this case, `http://[yourservername]/bbappfx/vroot/help/custom/AppealPolicies.html`. The modified topic should now have the additional link.
6. In the Infinity application, go to a page which calls the default help topic you modified. In this case, go to an appeal record.
7. From an appeal record, click the help icon on the explorer bar. The edited topic with the additional link appears.



8. Click the new link and the custom policy file appears.



## Notes about Reinstalling or Updating

Infinity-based help is updated with every new version of the program. We recommend that you keep a backup copy of your customized help file content to keep locally or on another network server as backup.

**Warning:** Help file changes to out of the box topics are not supported during an update or reinstallation process. If you change out of the box topics, save them with unique names, or copy and store them locally or on another network server to be preserved.

### For Reinstallations

A reinstallation of the program overwrites all out of the box content with updated versions. Any customizations made to out of the box help file topics will be overwritten unless they are saved with unique file names. As a recommendation, make sure you have a backup copy of the help topics and help content you customized.

### For Updates

When an update is performed the program will overwrite out of the box help topics in the “help” folder with the latest version. Custom content with unique names (not named the same as out of the box files) will not be overwritten. Custom content placed in the “custom” subfolder under the “help” folder will also not be overwritten.

