VisualSP™ 2013 Installation Procedure

Contents

Introduction

VisualSP™ is a SharePoint Help System with the main goal of enabling sustainable SharePoint adoption in the organization. It provides SharePoint end users the in-context, on-demand help and training they need to be successful working within SharePoint.

> **Watch the system overview video:**
>
> **http://sharepoint-videos.com/products/visualsp/ visualsp-video-showcase/#overview**

The following steps need to be performed on one of your <u>SharePoint web front-end servers by a SharePoint Server Administrator</u>. After performing these steps, VisualSP will automatically install itself on all of your SharePoint web front-end servers in the farm.

After installation, please refer to the <u>customization/evaluation guide</u> to learn how to customize the system to your needs.

Notes:
*It is advisable to **back up** your SharePoint environment before installing any 3rd party software including VisualSP.*
*If installing trial version, it is advisable to not deploy the trial in a Production environment. Instead, deploy in a **development** or **testing** environment.*

Take inventory of VisualSP files

The system ships with the following two main components:

- **VisualSPInstaller.exe** – VisualSP Installer application
- **VisualSP2013HelpItems.zip** - VisualSP farm hub content containing videos, documents and images (trial version file: **VisualSP2013HelpItems_trial.zip**)

Place both files in *C:\VisualSP* folder on the server.

Note:
Do not unzip the VisualSP2013HelpItems.zip file!
For a current list of all content provided by VisualSP, please see
http://www.visualsp.com

Install VisualSP

Please follow the steps <u>exactly</u> as they appear below.

*Note: Make sure you are logged in to the web server as a **SharePoint Server Administrator***

Create a new **site collection** under any web application within your farm which will serve as the main hub for the VisualSP content
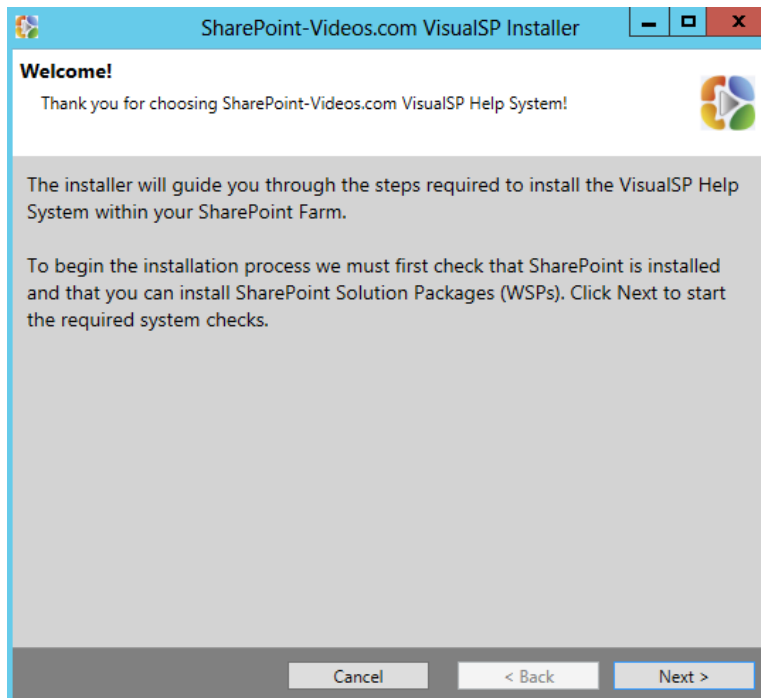
      Site Template – Team Site
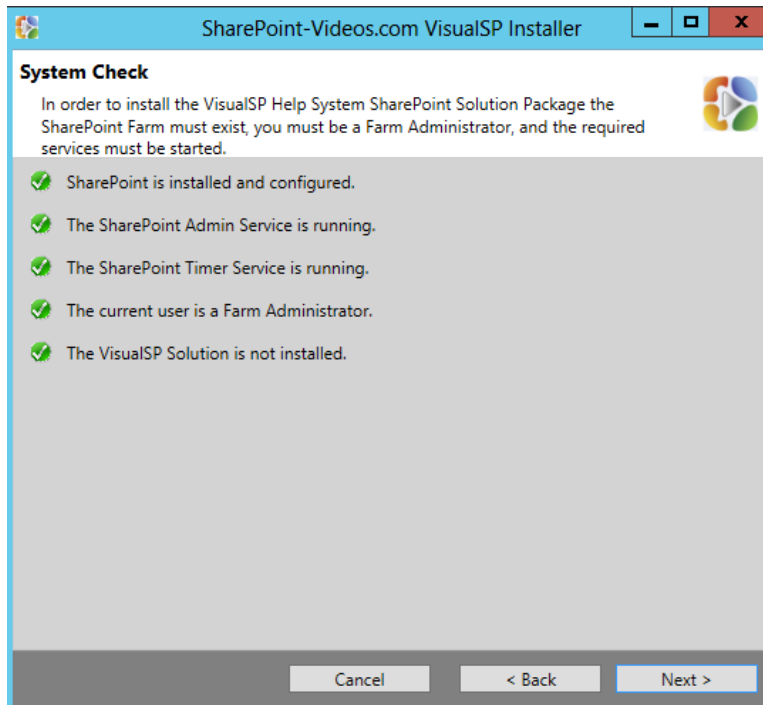   **Title** – VisualSP Farm Hub
      URL – VisualSPFarmHub

Note: If you already created the above site collection as part of a Trial install provided to you earlier, you may skip this step.

Double click on the **VisualSPInstaller.exe** file to start the installer

Click **Next** to continue.

If all system checks pass, click **Next** to continue.

Read the End User License Agreement. If you agree with the agreement, click the checkbox to indicate your agreement and click **Next.**

Install VisualSP -
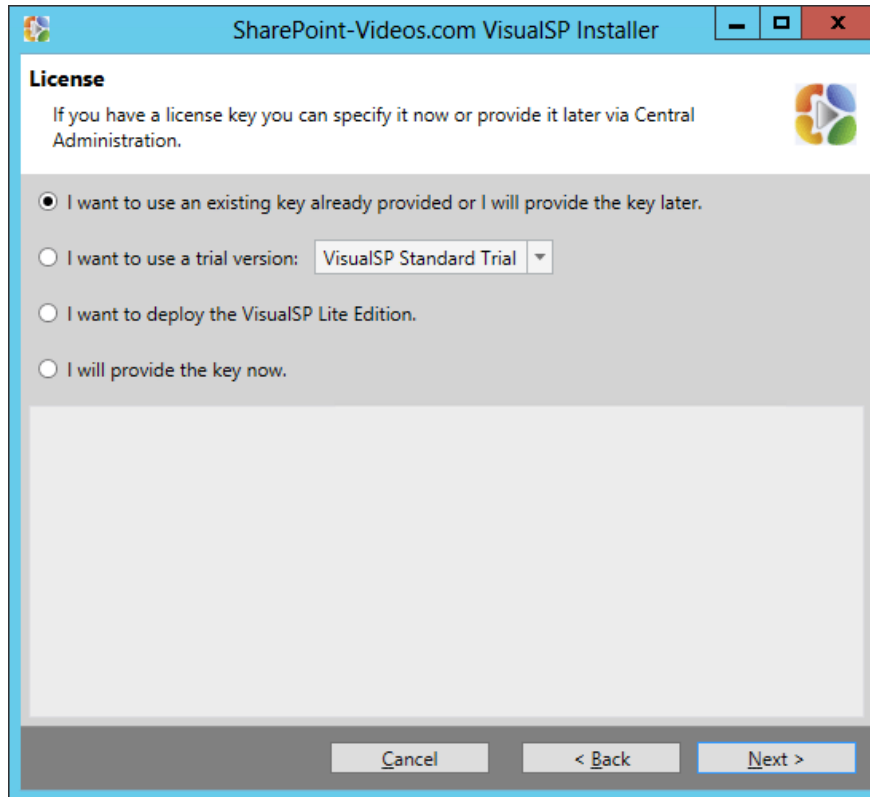
Please select the correct choice from the list on the screen depicted in the image, above.

A **License Key** should have been provided to you unless you are installing a 30 day trial (for our Enterprise, Express or Standard version) in which case you do not need a key.
Copy the license key and paste it in the box the installer will expose to you after you make your selection.

[Click here](#) for more information and to explore differences between each version.

Note on VisualSP Lite Edition: The Lite edition of VisualSP is provided with a free perpetual license. [Click here](#) to find out more information about this edition.

Lite edition differs from other editions in the following way:
- Does not have the ability to customize existing Help content or create your own
- Content (videos, documents, tip sheets) is not provided to the client to host in-house, but it's delivered through our cloud service
- Does not show analytics of which content is being utilized and by who

You will not require a key if you are using our installer to deploy the Lite edition. Simply click on the radio button to the left of this option to instruct the installer to proceed with this deployment.
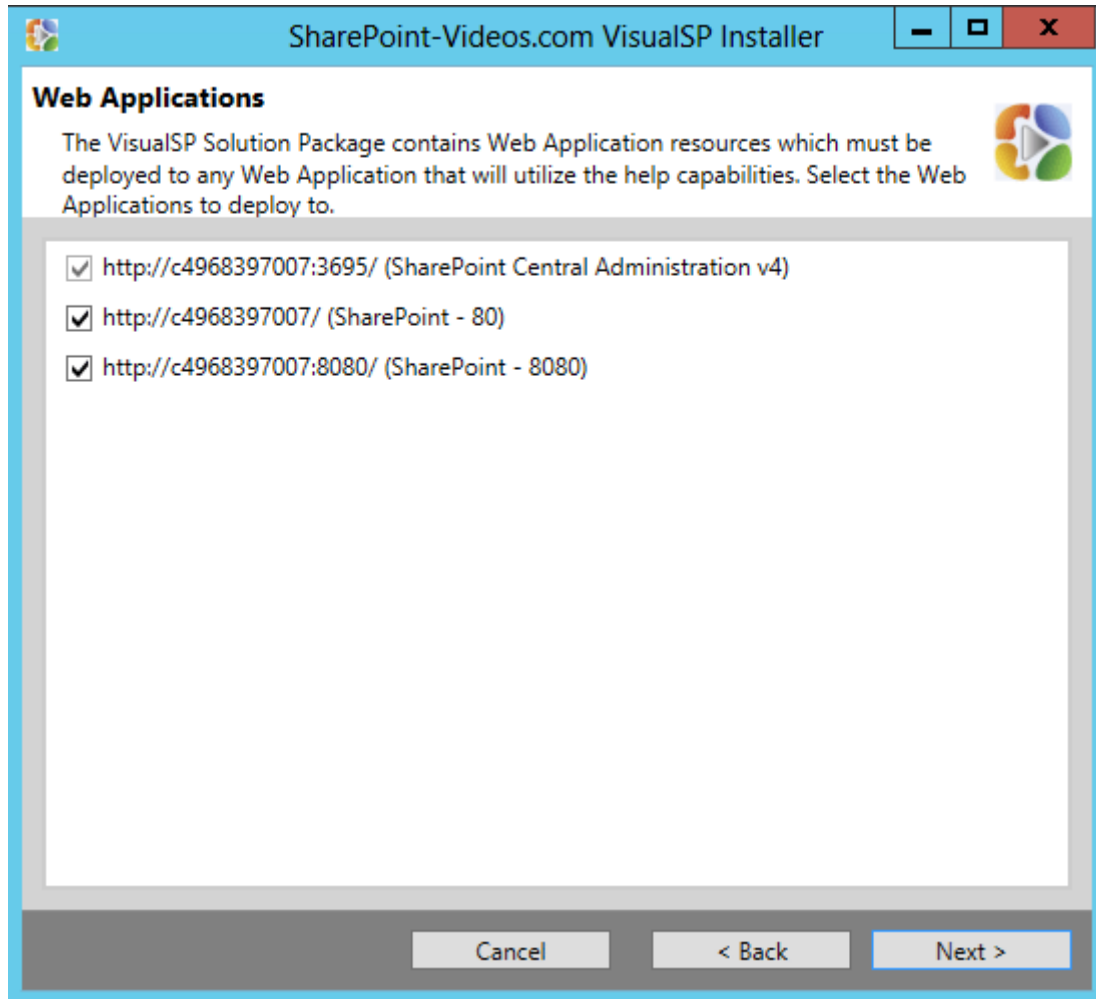
Select the checkboxes for all the web applications where you would like to install the VisualSP Help System.

> *Note: The Central Administration web application is clicked and the option is greyed out, by default, and cannot be changed.*
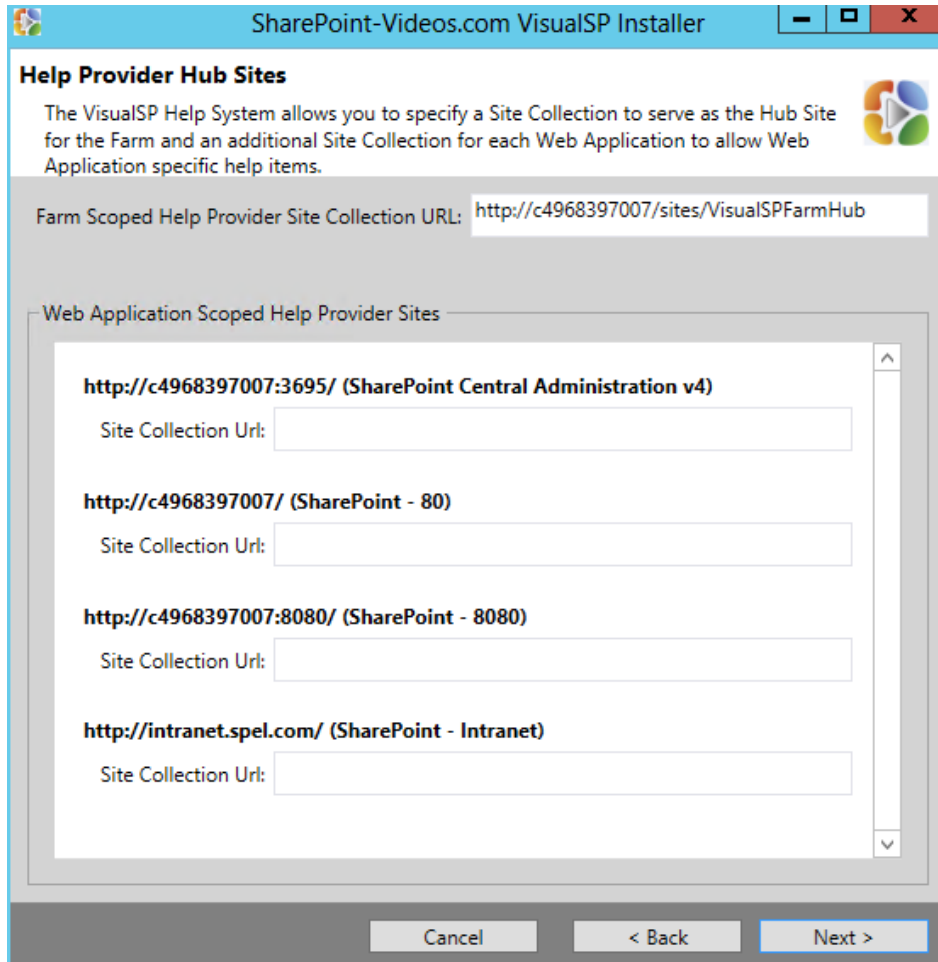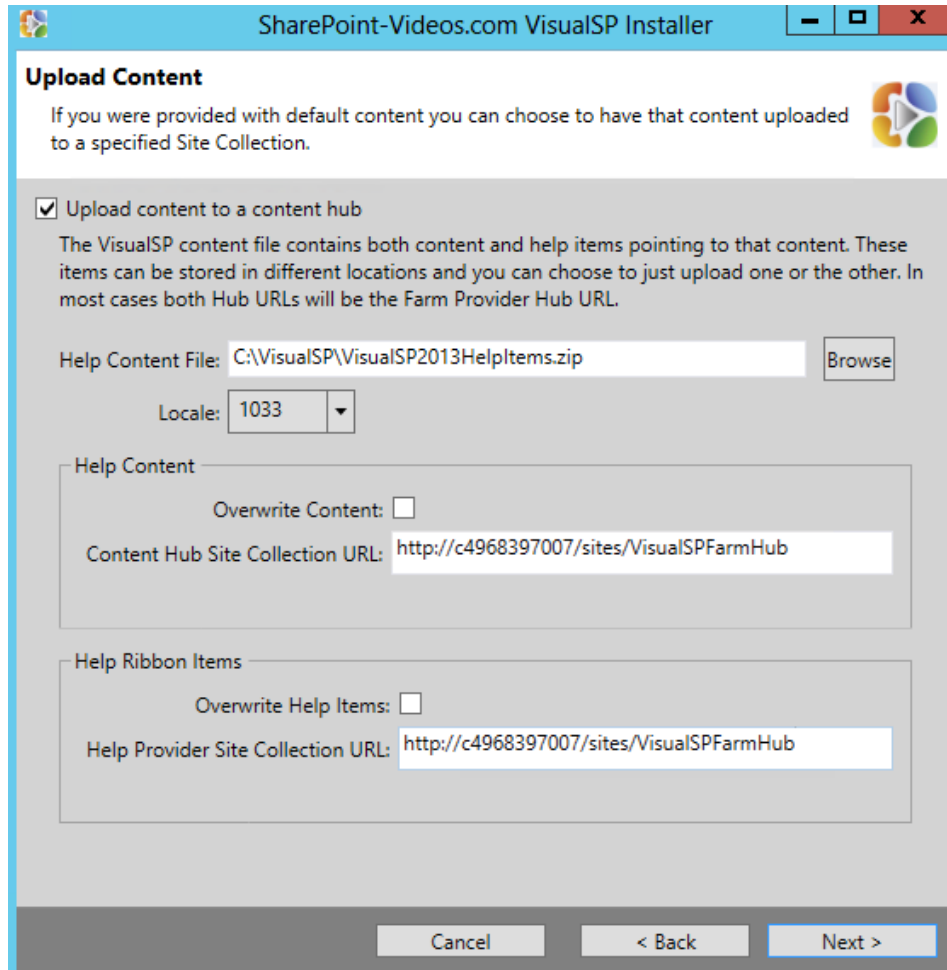
Install VisualSP -

The **Farm Scoped Help Provider Site Collection URL** will be the URL of the site collection you created to serve as the VisualSP Farm Hub in the first step of the install process.

Optional
Set the **Site Collection URL** for the site collection in each web application that would serve as the hub for the Help content for that web application. If the field is left blank, the VisualSP Farm Hub will serve the content for that (those) web application(s).

Click the **Upload content to a content hub** checkbox and provide the location for the Help items zip file in *C:\VisualSP.*

Note: Leave the Locale selection to 1033 which is the code for American English

In the **Help Content** and **Help Ribbon Items** sections, both will be the URL of the site collection you created to serve as the VisualSP Farm Hub in the first step of the install process.

Note: For trial installation, leave the Overwrite Content and Overwrite Help Items checkboxes unchecked. If you already uploaded trial content provided before and now wish to replace that with the production version, check the checkboxes.
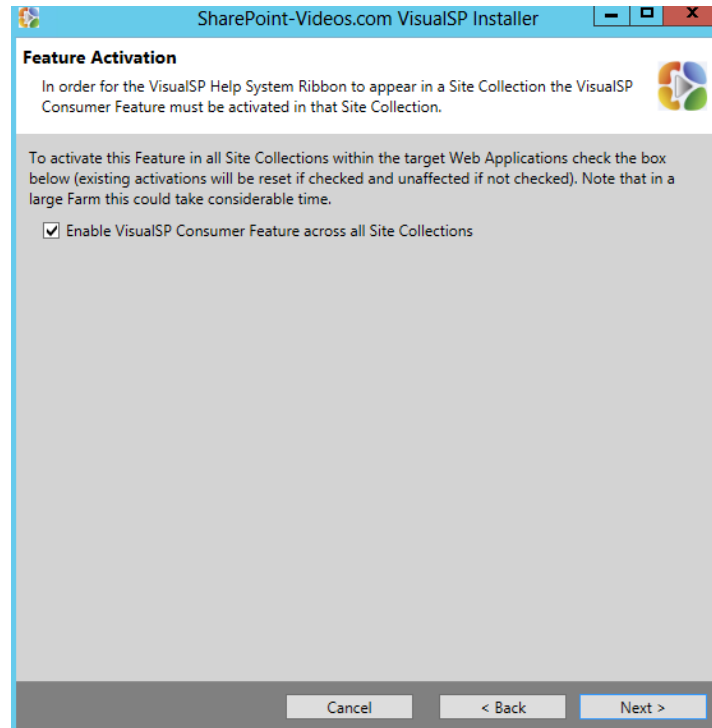
Install VisualSP -

Click the checkbox to enable VisualSP across all site collections within the earlier chosen web applications.

Notes regarding VisualSP Express:
If you are installing VisualSP Express, you will need to manage Help items at each site collection instead of being able to do it from a central location.

After the installation, even though VisualSP will be active across all site collections, the Help tab will not show up in a site collection unless Help items are declared at that site collection.

The list of Help items can be imported by first exporting the list of Help items from the hub. The Help items can also be created one by one and they will start showing up at the appropriate Help tab.

Please refer to the customization/evaluation guide to learn more about how to customize the Express version.
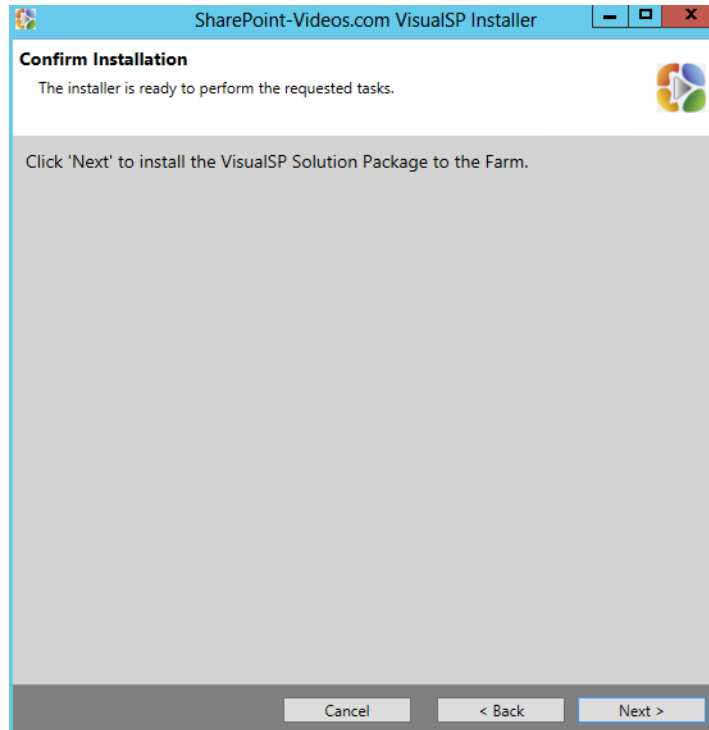
Install VisualSP -

Click **Next** to confirm installation of the system.
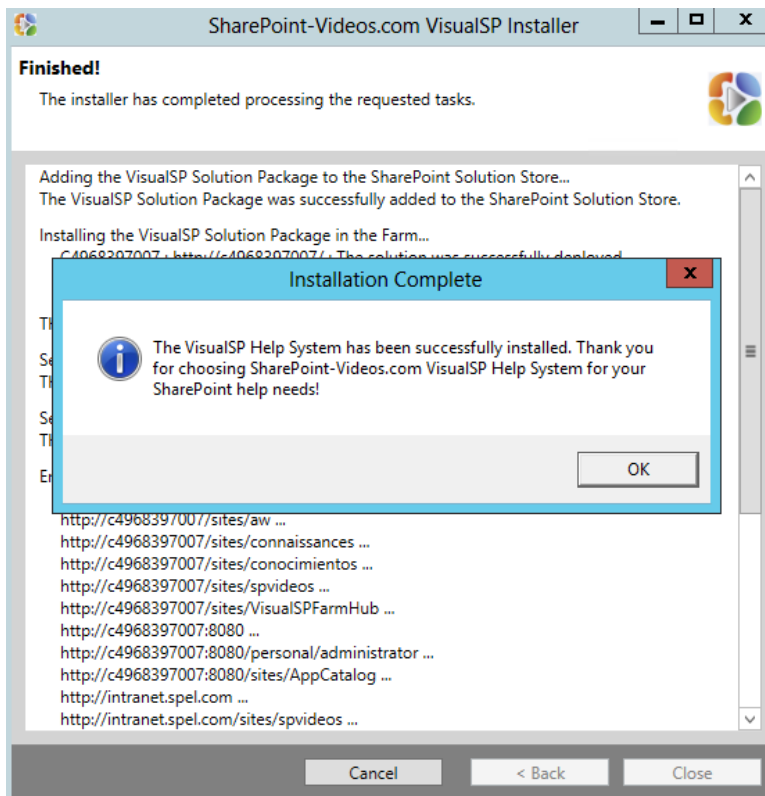
Once the system is installed, it will show the above successful message.

Install VisualSP -

Test the Solution

Once VisualSP is installed, the Help tab should be available across all site collections if you have installed the Standard version.

VisualSP Express will require having the Help items declared at each site collection level before they show up in the Help tab for that site collection.

Look out for the Help tab in the following types of pages:

1. Web page
2. List and Library pages
3. List and Library Settings pages
4. Site Settings page
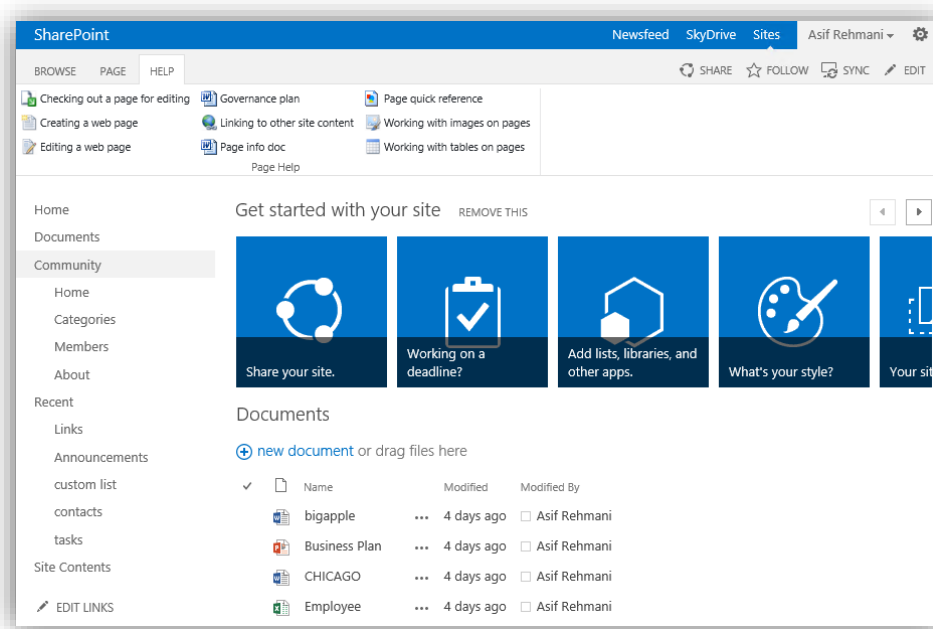
Below are a few examples to test out the functionality.

> *Note: The content might differ from below in your installation dependent on your configuration or the latest updates you have been provided.*

Test the Solution -

Page

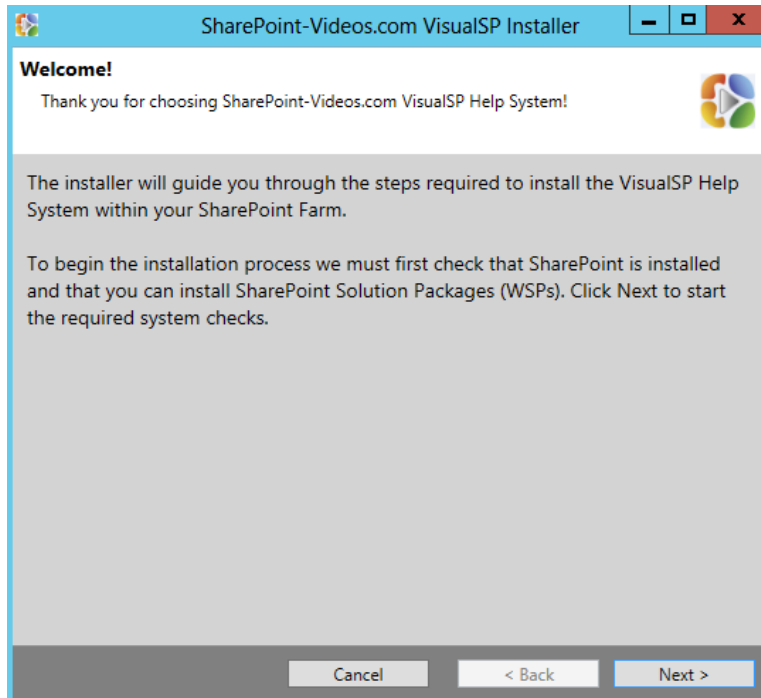## Document library

Tasks list

Calendar list

Pop-up dialog box showing video help
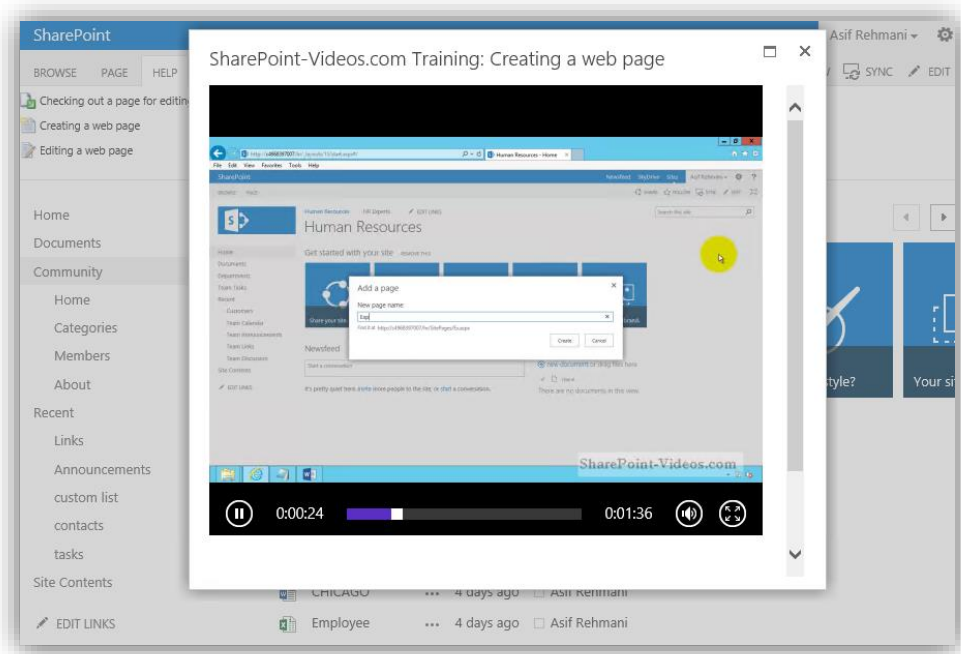
Try out the solution in various site collections within the farm to make sure all videos, documents and images appear as expected.
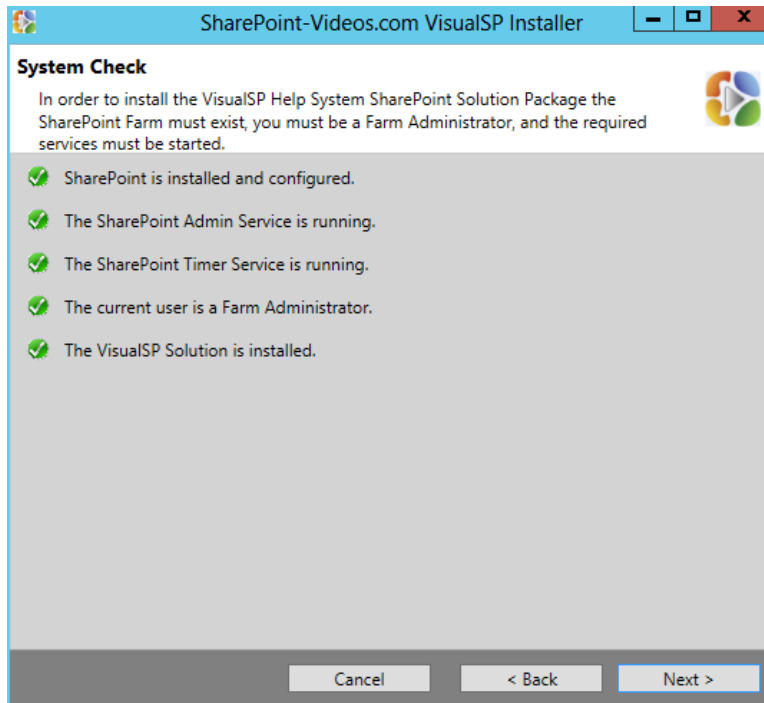
Un-install VisualSP

If you need to un-install VisualSP for any reason, please perform the following procedure:
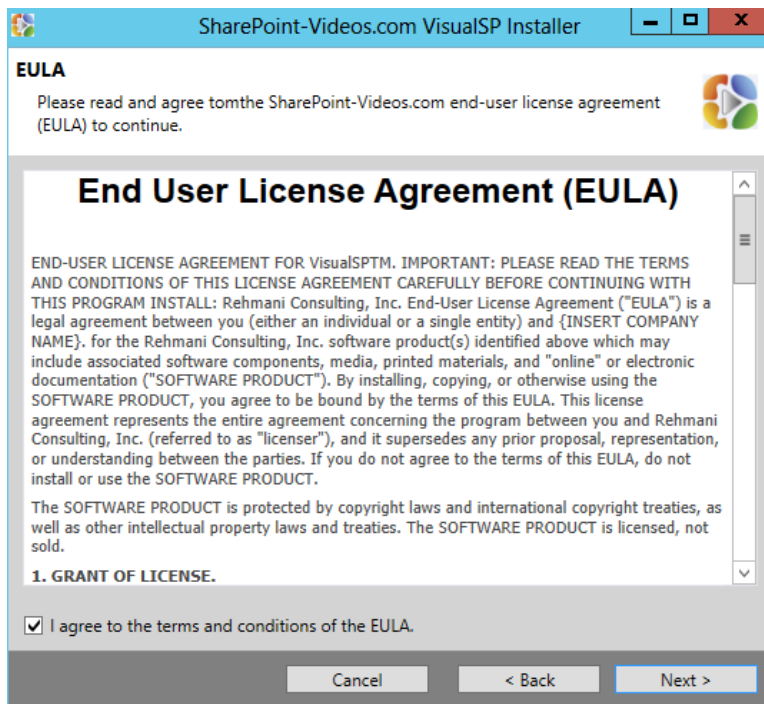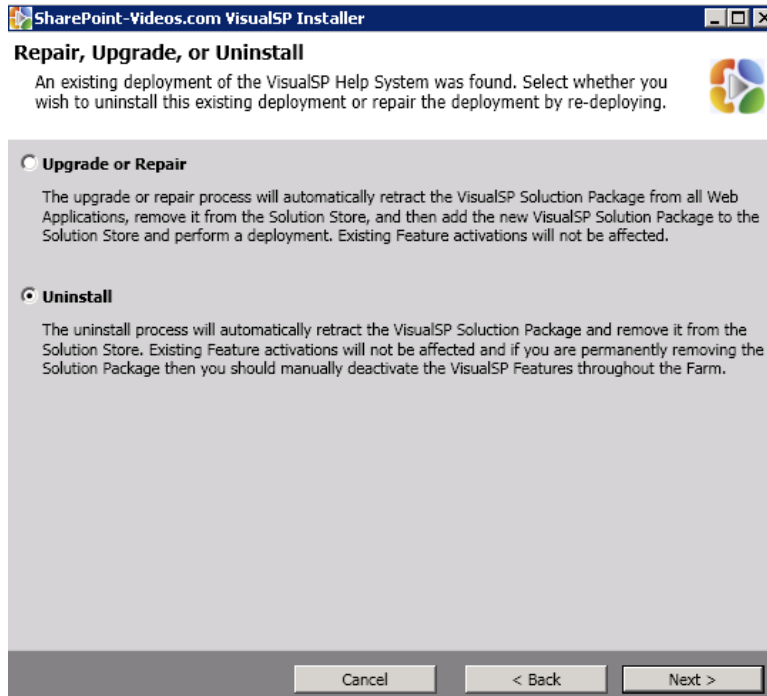

Click **Next**

Click **Next**
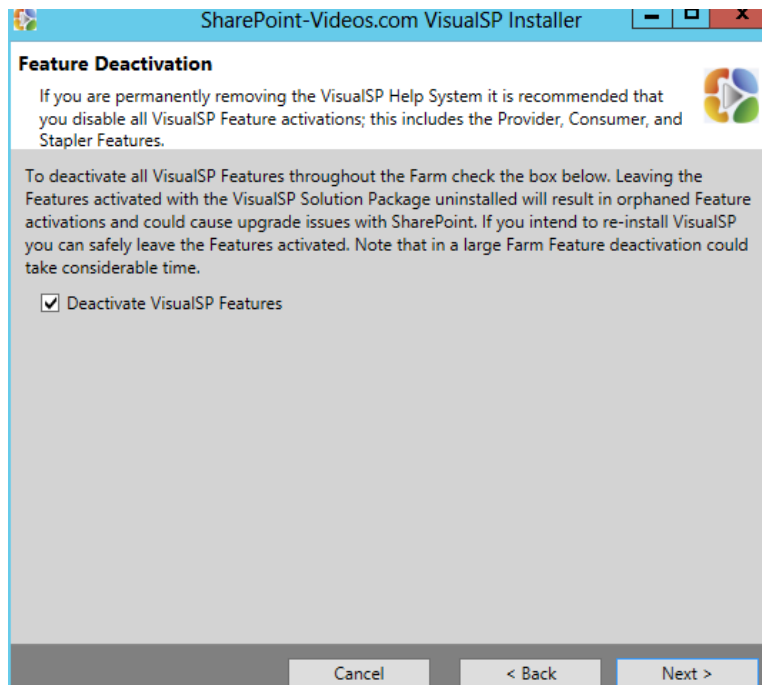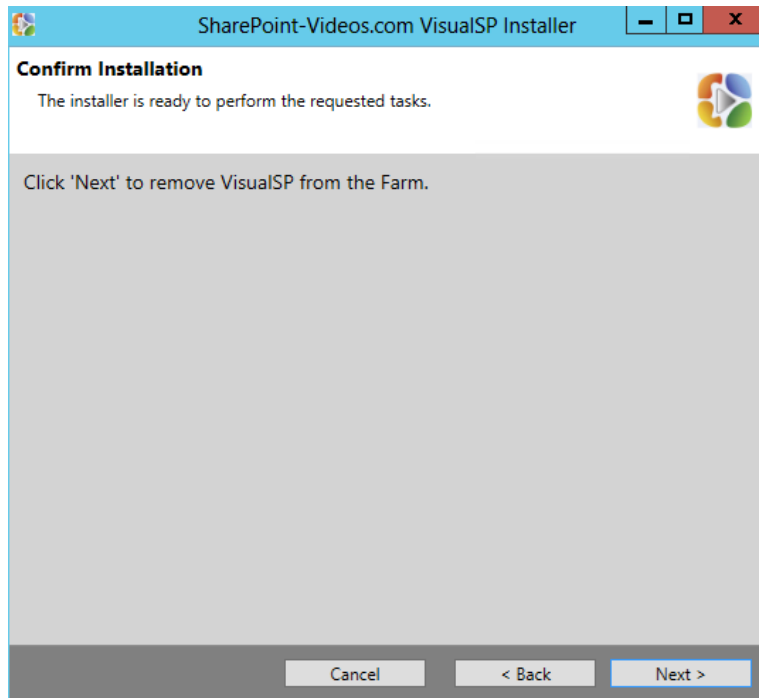

Read the EULA and if you agree, click the checkbox and click **Next**
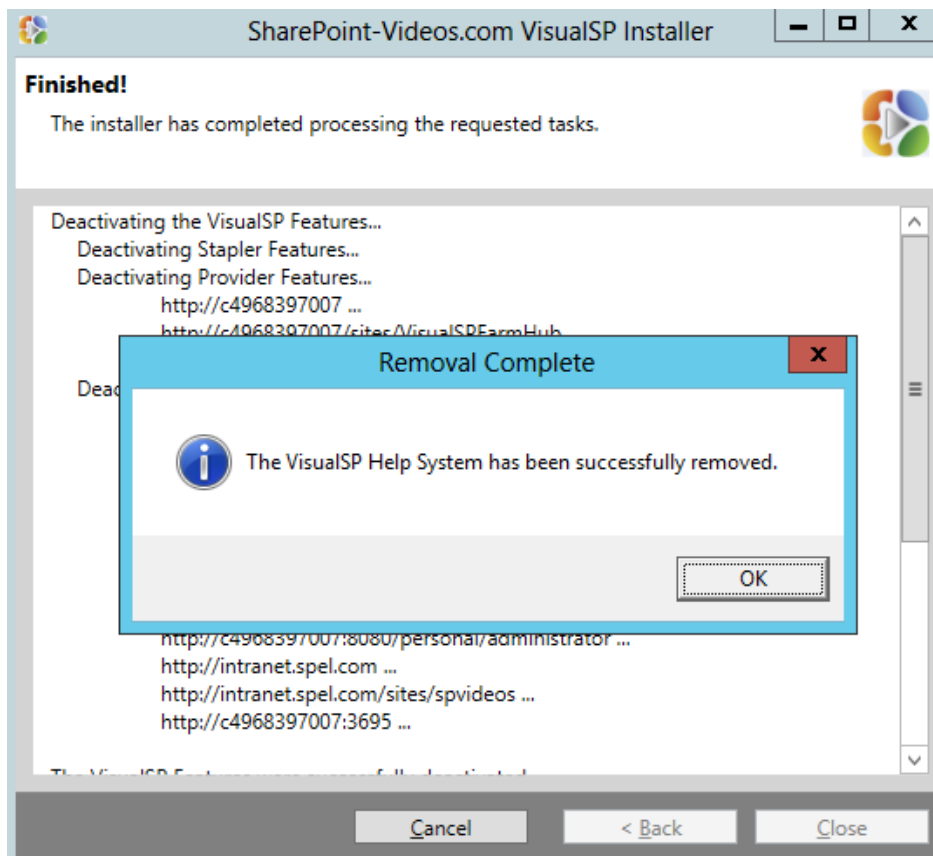
Un-install VisualSP -

Choose **Uninstall** then click **Next.**

Click checkbox to **Deactivate VisualSP Features** from all site collections in the farm and then click **Next.**

Un-install VisualSP -

Click **Next** to begin uninstallation of VisualSP from the farm.

Un-install VisualSP -

VisualSP Help system has been uninstalled from the system.

Note: *All of the media (videos, help documents, help screenshots) populated in the VisualSP Farm Hub site collection will still remain. You can go ahead and delete the data and/or the site collection completely if you don't need it anymore.*

To get more information on the VisualSP Help System, please visit:
http://www.visualsp.com

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