



# VisualSP Help System 2013 Installation Procedure

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Rev 6.2 for VSP 5.2.0.0

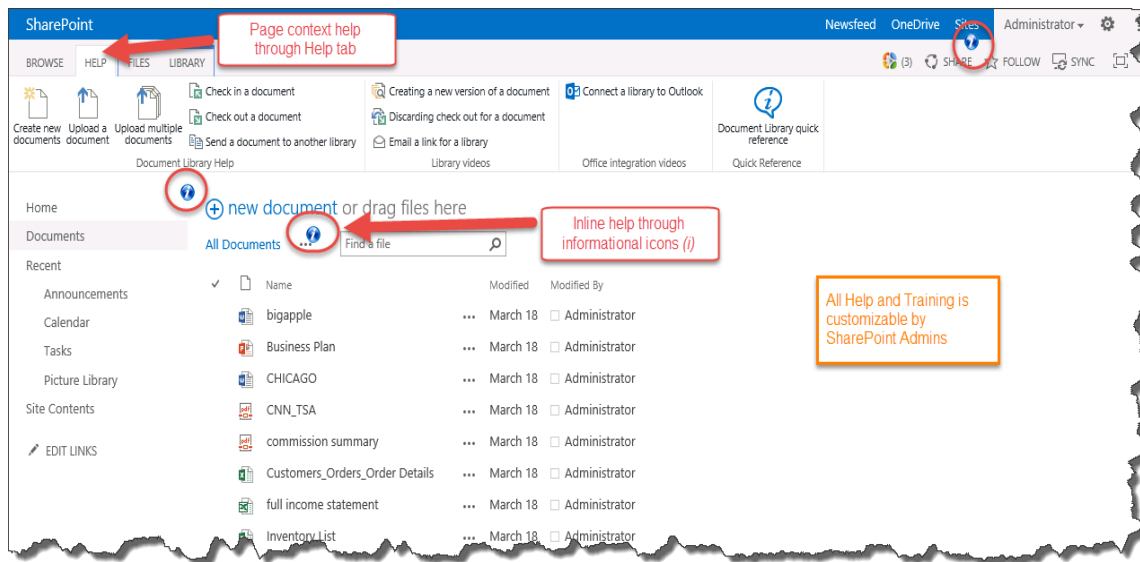
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# Introduction

VisualSP Help System 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.

The Help and Training items are made available to information workers through the context sensitive Help tab and informational icons (i) that appear throughout the SharePoint interface.



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

After installation, please refer to the [customization/evaluation guide](#) to learn how to customize the system to your needs.

It is very important to follow all steps **exactly** as they appear below.

# Familiarize Yourself with the VisualSP Help System Architecture

During the installation process, you will need to make a number of decisions about how the VisualSP System will be set up. Although any settings can be easily changed at a later time, the more you understand about the architecture of the VisualSP Help System at the beginning, the less time you will have to spend trying to figure out which things need to be changed and how to change them.

It will take you about 5-minutes to read [Appendix A: Overview of VisualSP Help System Architecture](#) at the end of this manual. It is written from a non-technical perspective and loaded with diagrams to make it very easy to quickly comprehend.

## Back up Your SharePoint Environment

Before installing VisualSP, it is vitally important that you perform a full backup of your complete SharePoint environment just as you would before you install any other 3<sup>rd</sup> party software.



***Note:** If you are installing a trial edition of VisualSP, we recommend that you install it to a **development or testing / staging** environment. Do not install a trial edition in a **production** environment.*

## Copy Files to the SharePoint Server

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

The installation requires two files:

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



***Note:***

***Do not unzip the VisualSP2013HelpItems.zip file!***

*For a current list of all content provided by VisualSP Help System, please see:*

*[SharePoint 2013 Videos list](#)*

*[Help Content layout in SharePoint interface](#)*

# Create the VisualSP Farm Hub Site Collection

In Central Administration, create a new **site collection** to serve as **the VisualSP Farm Hub**. This site collection will provide Help Items to the entire SharePoint farm.

You may create this site collection under any web application within your farm. However, **DO NOT create this site collection on any Web Application that you intend to also host a VisualSP Web Application Hub**. If you want each site collection in your farm to be able to render Help Items from the Farm Hub, a Web Application Hub, and to also host its own Help Items that are unique to that site collection, you will want to create a new separate Web Application just for the VisualSP Farm Hub.

**Web Application:** (see notes)

**Title** – VisualSP Farm Hub

**URL** – VisualSPFarmHub

**Site Template** – Team Site



***Note:** If you already created this site collection as part of a Trial installation, you may skip this step and continue to use the existing VisualSP Farm Hub.*

Web Application  
Select a web application.

Title and Description  
Type a title and description for your new site. The title will be displayed on each page in the site.

Web Site Address  
Specify the URL name and URL path to create a new site, or choose to create a site at a specific path.

Template Selection

Web Application: [dropdown menu]

Title: [text box: VisualSP Farm Hub]

Description: [text box]

URL: [text box: VisualSPFarmHub]

Select experience version: [dropdown menu: 2013]

Select a template: [dropdown menu: Team Site, Blog, Developer Site, Project Site, Community Site]

A place to work together with a group of people.

During the installation, you will be given the opportunity to have the installer automatically upload the Help Content (that is, the videos, documents, screenshots, and icons that are rendered to the end users as the packaged content and Help Items) to a SharePoint site. It will upload it to the Site Assets library of the selected site. It is important that all users have Read permissions to the library where this content is uploaded. For ease of management, we recommend that be uploaded to the VisualSP Farm Hub.

**Set permissions on the Site Assets library to grant the Read Permission Level to all users.**

# Install the VisualSP Help System

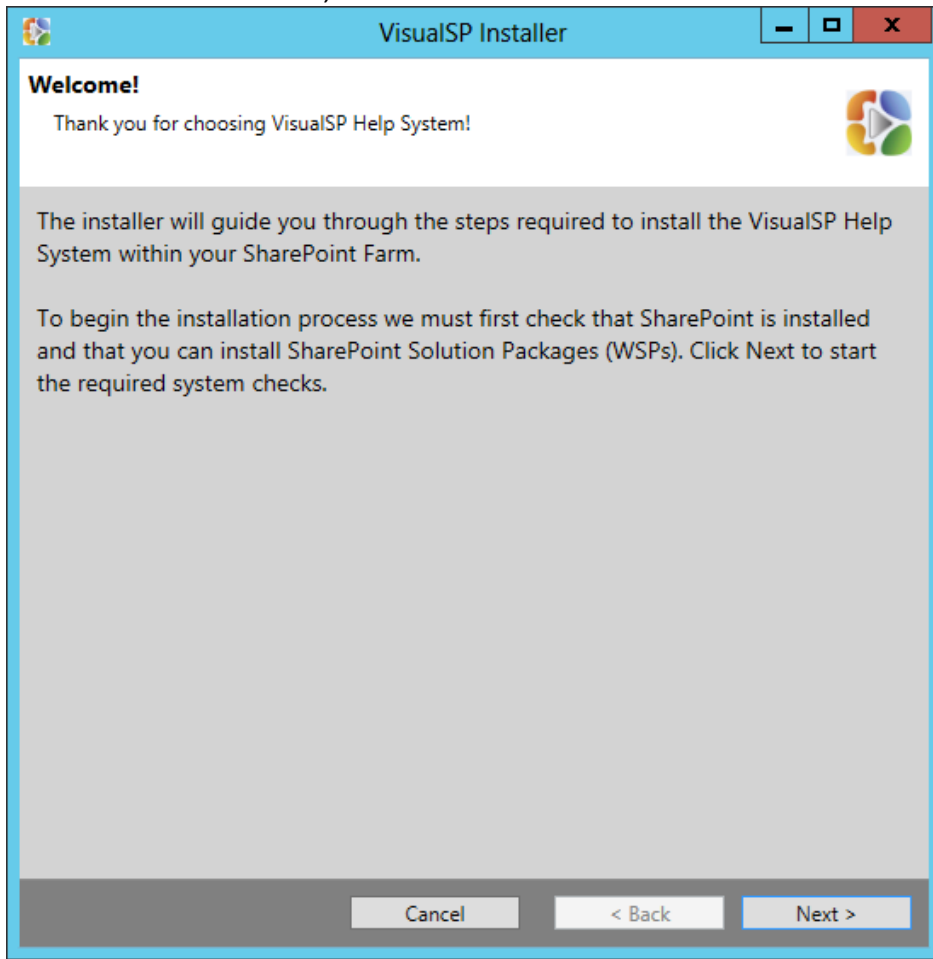
It is very important to follow all steps **exactly** as they appear below.

1. Log into one of your SharePoint Web Front-End servers as a SharePoint Server Administrator. It is not necessary to install VisualSP on each SharePoint server. The installation will be automatically installed on all other web front-end servers in the farm.

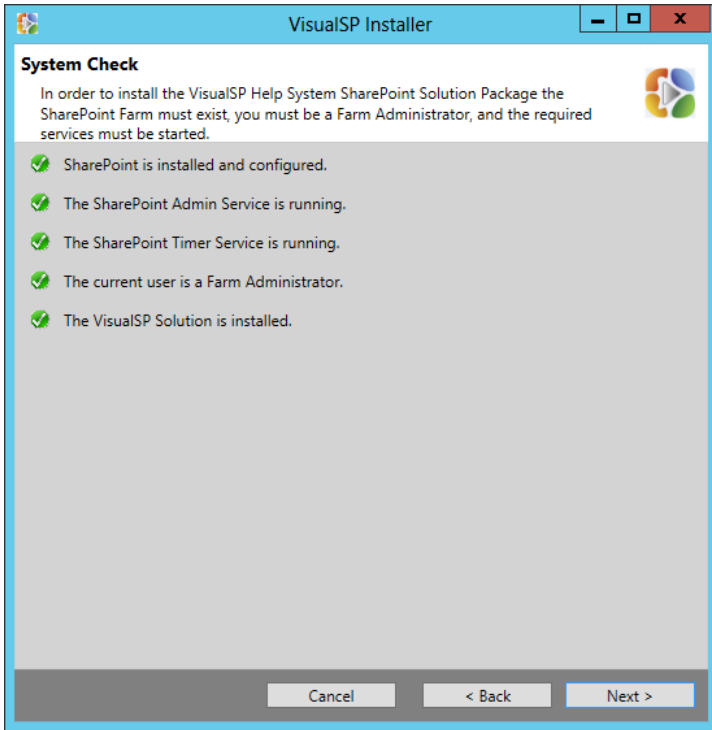


**Note:** Make sure you are logged in to a **SharePoint Web Front End** server as a **SharePoint Server Administrator**

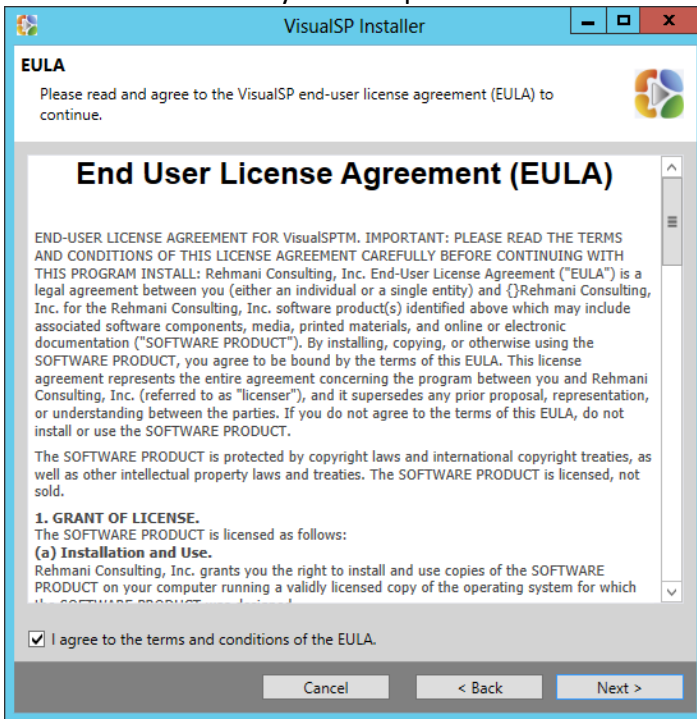
2. Double click on the **VisualSPInstaller.exe** file to begin the installation.
3. **On the Welcome screen**, click **Next** to continue.



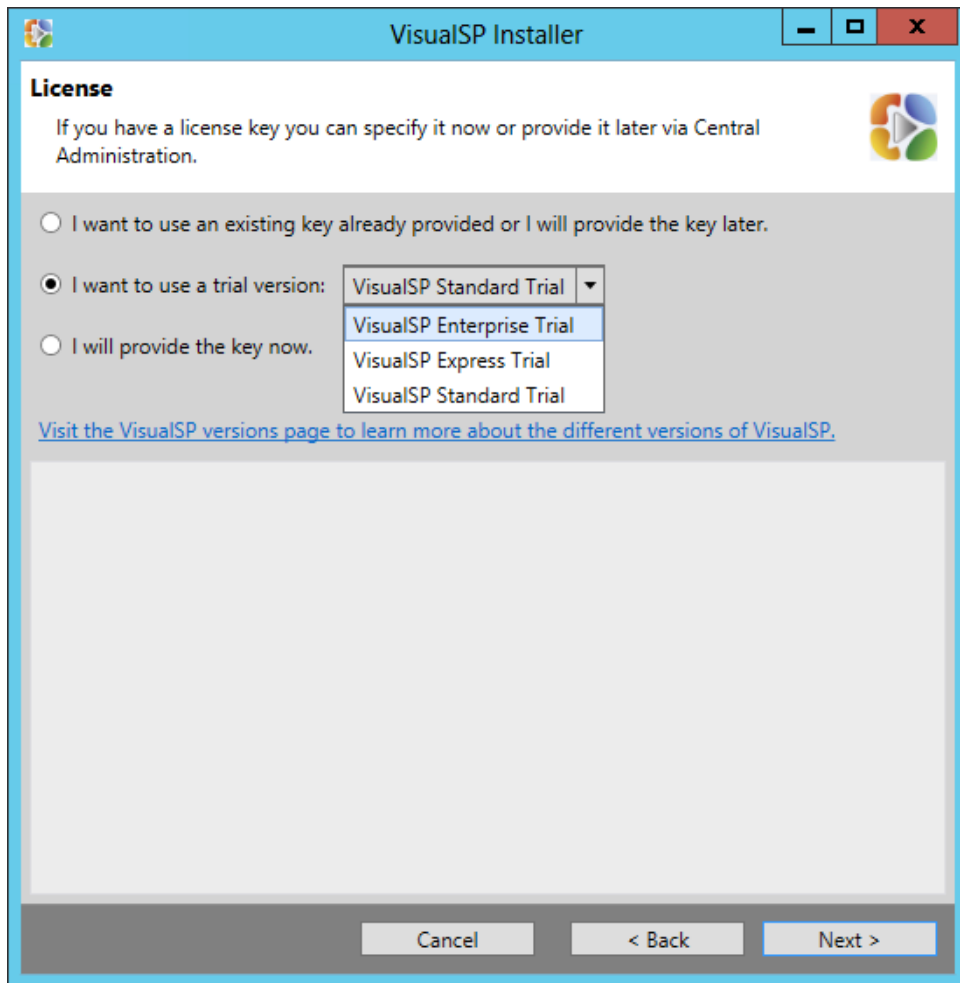
4. **On the System Check screen**, if all system checks pass, click Next to continue. If it encounters issues, correct them and run the installer again. Click **Next** when all items pass the system check.



5. **On the EULA screen**, read the End User License Agreement. If you accept the license, click the checkbox to indicate your acceptance and click **Next**.



6. **On the License screen**, select the appropriate choice for your installation.
- a. **Select the first option if either: a) you have purchased VisualSP but cannot enter your license key at the moment; or b) you are upgrading or reinstalling.** If upgrading or reinstalling, VisualSP will find your previous license key and you shouldn't have to enter it again.
  - b. **Select the second option if you are evaluating VisualSP for your organization.** You will have 30-days to try out the product. You do not need a license key during the trial period. **We suggest selecting VisualSP Enterprise Trial so you can experience all available options.** To explore the differences between Enterprise, Standard, and Express Editions, [click here](#) or click on the link on this install screen.
  - c. **Select the last option if you have purchased VisualSP and have your license key.** Copy the license key and paste it in the large white box that will appear on this screen after selecting this option.
  - d. Click **Next**.

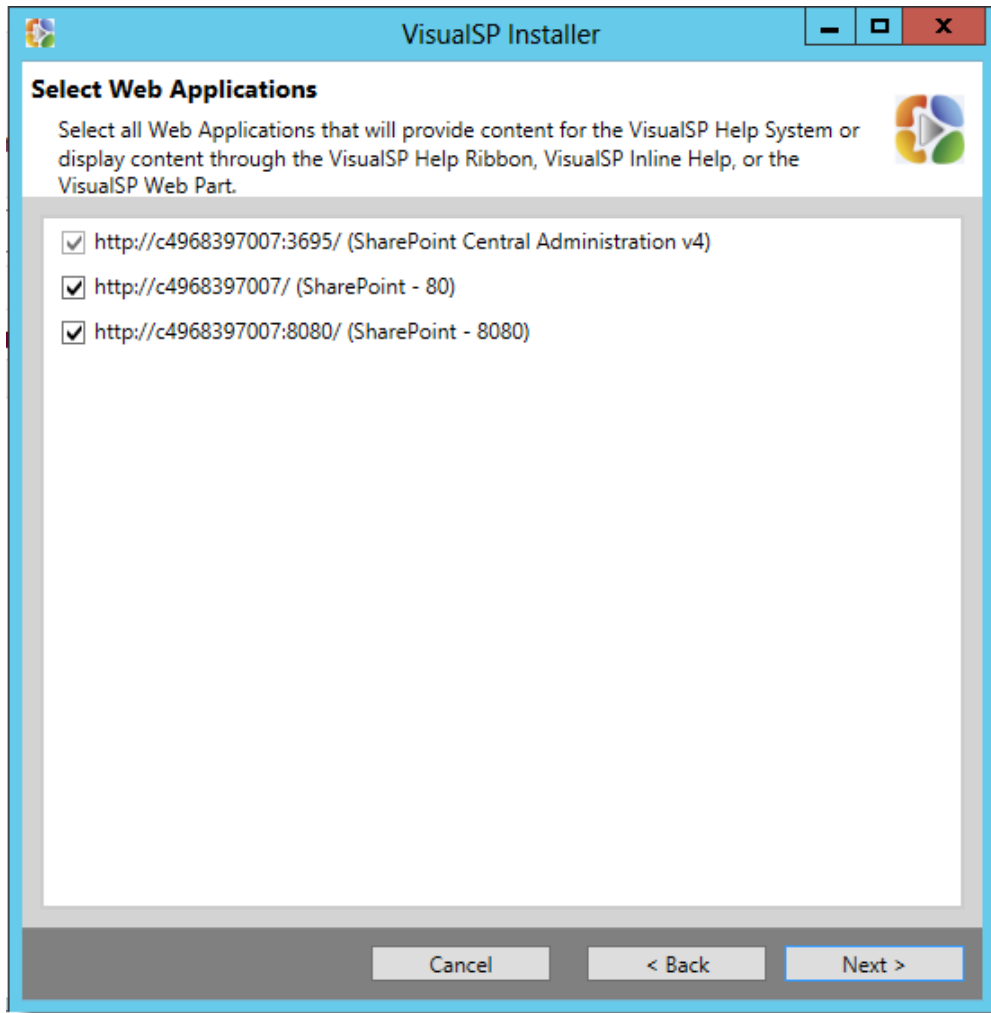




7. **On the Select Web Applications screen**, select the checkboxes for **all** Web Applications which might play **any role** in the VisualSP Help System. Consider which web applications host site collections that may provide Help Items to itself or any other site collection. Also consider any web application that hosts any site collection that may need to display Help Items through the VisualSP Help Tab Ribbon, VisualSP Inline Help, or the VisualSP Web Part.

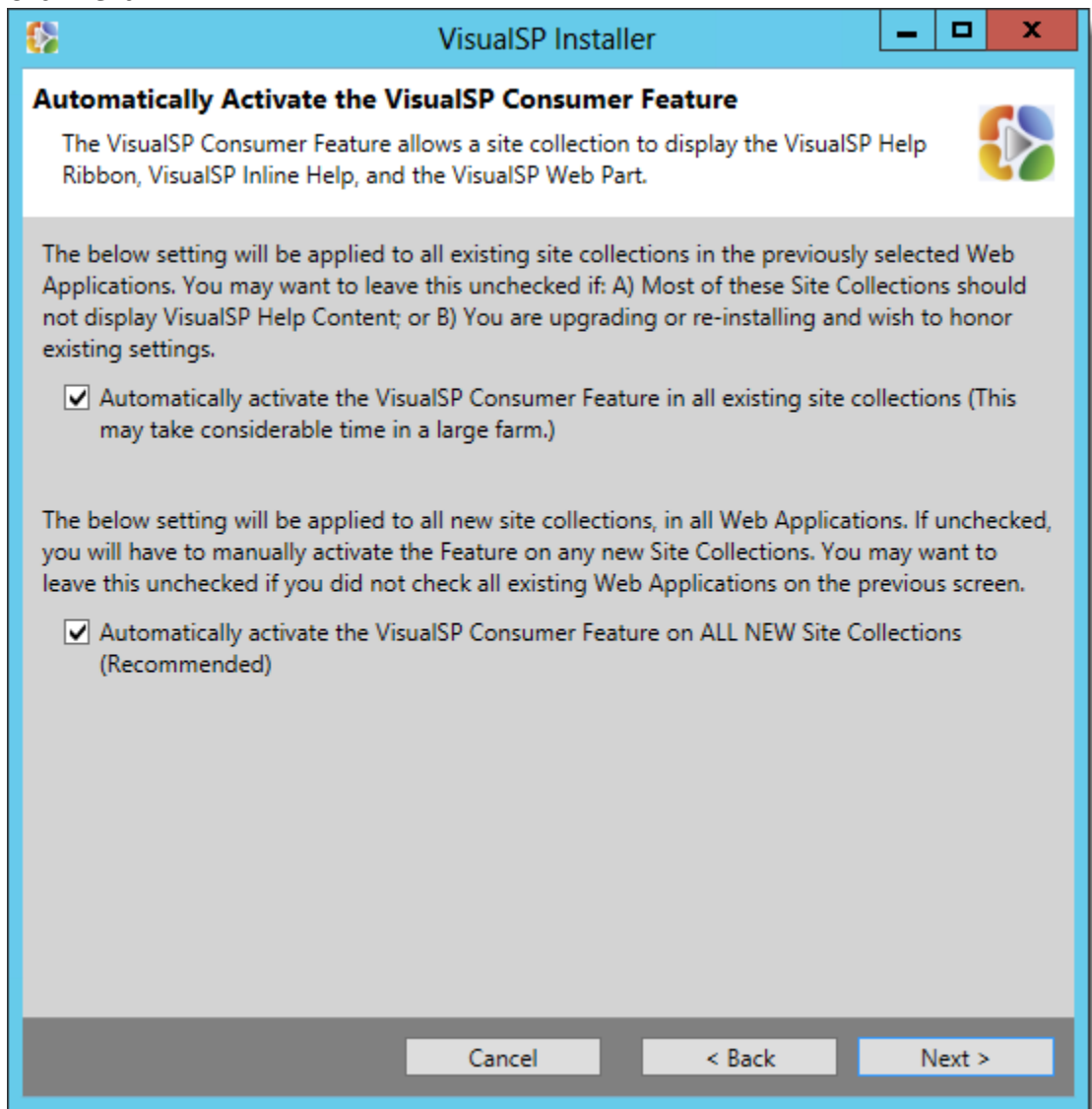
In most organizations, you will select all web applications unless there are some that you are certain will never need to provide or consume VisualSP Help Items.

Click **Next**.



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

8. **On the Automatically Activate the VisualSP Consumer Feature screen**, the VisualSP Consumer Feature allows a site collection to display the VisualSP Help Ribbon, VisualSP Inline Help, and the VisualSP Web Part.
- a. The first check box refers to ALL EXISTING site collections on the web applications you selected on the previous screen. We recommend that you check this box unless A) Most of the sites collections in the selected web applications should not display VisualSP Help Items; or B) You are upgrading or re-installing and wish to honor existing settings in those site collections.
  - b. The second box refers to ALL NEW site collections that will be created in ALL Web Applications (regardless of whether they were checked on the previous screen or not). We recommend that this be checked, unless you didn't select all Web Applications on the previous screen.
  - c. Click **Next**.



9. On the **Select Help Provider Hub Sites** screen:

- I. In the text box for **Farm Scoped Help Provider Site Collection URL**, enter the full http (or https) path to the site collection you created earlier to serve as the *VisualSP Farm Hub*.
- II. The **Web Application Scoped Help Provider Sites** section is optional. These can be easily added or changed later from Central Administration. All site collection in all Web Applications will be able to consume Help Items from the VisualSP Farm Hub. However, there may be other Web Applications that will also need its own Help Items in addition to, or instead of, those provided by the VisualSP Farm Hub. For each Web Application that will need its own Help Items, enter the full URLs to the site collection that will serve as the VisualSP Web Application Hub for all site collections in that web application.
- III. Click **Next**.

**VisualSP Installer**

### Select Help Provider Hub Sites

Manage help content in a VisualSP Hub site instead of managing it in each site collection. A Farm Hub can provide help content throughout the SharePoint farm. A Web Application Hub can provide help content throughout that Web Application.

Farm Scoped Help Provider Site Collection URL:

Web Application Scoped Help Provider Sites (optional - Standard and Enterprise versions only)

- http://c4968397007:3695/ (SharePoint Central Administration v4)**  
Site Collection Url:
- http://c4968397007/ (SharePoint - 80)**  
Site Collection Url:
- http://c4968397007:8080/ (SharePoint - 8080)**  
Site Collection Url:

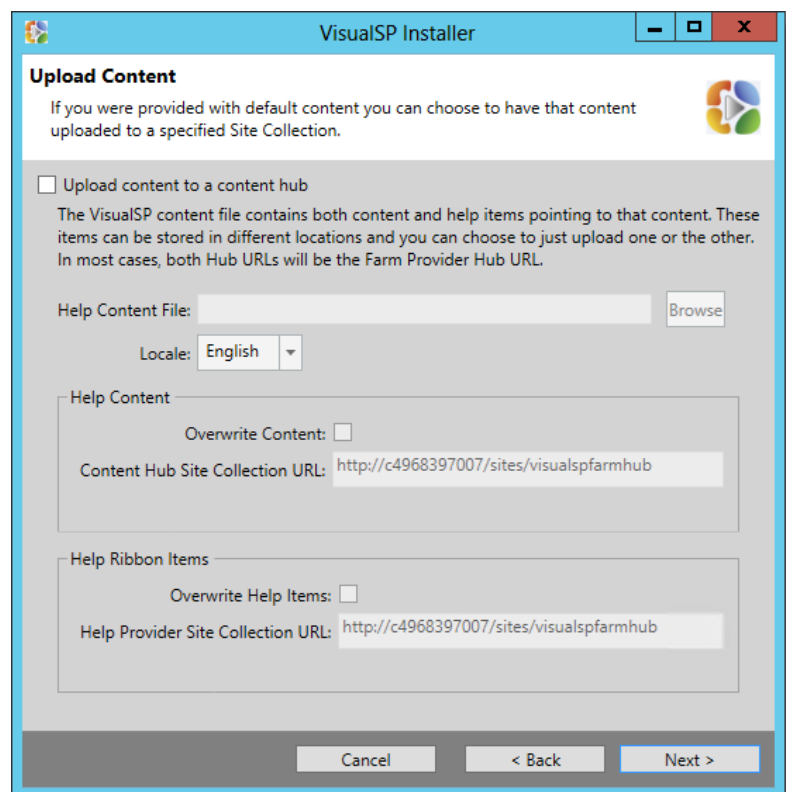
Cancel   < Back   Next >



**Note:** DO NOT create a Web Application Hub for the web application that hosts the VisualSP Farm Hub!

10. On the Upload Content screen:

- A. Check the box **beside Upload content to a content hub**.
- B. For the Help Content File, click the **browse** button, select the **c:\VisualSP\VisualSP2013HelpItems.zip** you uploaded to the server earlier.
- C. For **Locale**, leave the **English** option selected.
- D. In the **Help Content section**,
  - I. Help Content refers to the videos, documents, screenshots, and icons that are displayed to users. The installer will automatically upload this content to a SharePoint site of your choice. For ease of management, we recommend that it be uploaded to the VisualSP Farm Hub, but you may choose any site in any site collection. It is vitally important that all users have the Read Permission Level on the Site Assets library of the site whose path you enter in this section.
  - II. Check the box if you want any existing Help Content in that Site Assets library to be overwritten. If you have previously installed a trial edition of VisualSP, and have customized any of the Help Content, you may want to leave this box unchecked.
- E. In the **Help Ribbon Items section**,
  - I. Help Items refers to the help icons and links that users click on in the Help Ribbon, the Inline Help Menu, and the VisualSP Web Part to view the Help Content. In most cases, you will enter the URL to the VisualSP Farm Hub here to have those Help Items automatically uploaded there.
  - II. If any Help Items in the selected Site Collection have been customized, and you don't want to lose those customizations, you may want to leave the Overwrite Help Items option, unchecked. If you know you want to start over fresh, then check this box. If you are unsure, we recommend that you export the existing Help Items to the XML format, before continuing (See the [Customizing and Enhancing the VisualSP Help System](#) document for instructions) so you can safely check the box to overwrite those items.
- F. Click **Next**.





**Notes regarding VisualSP Express:**

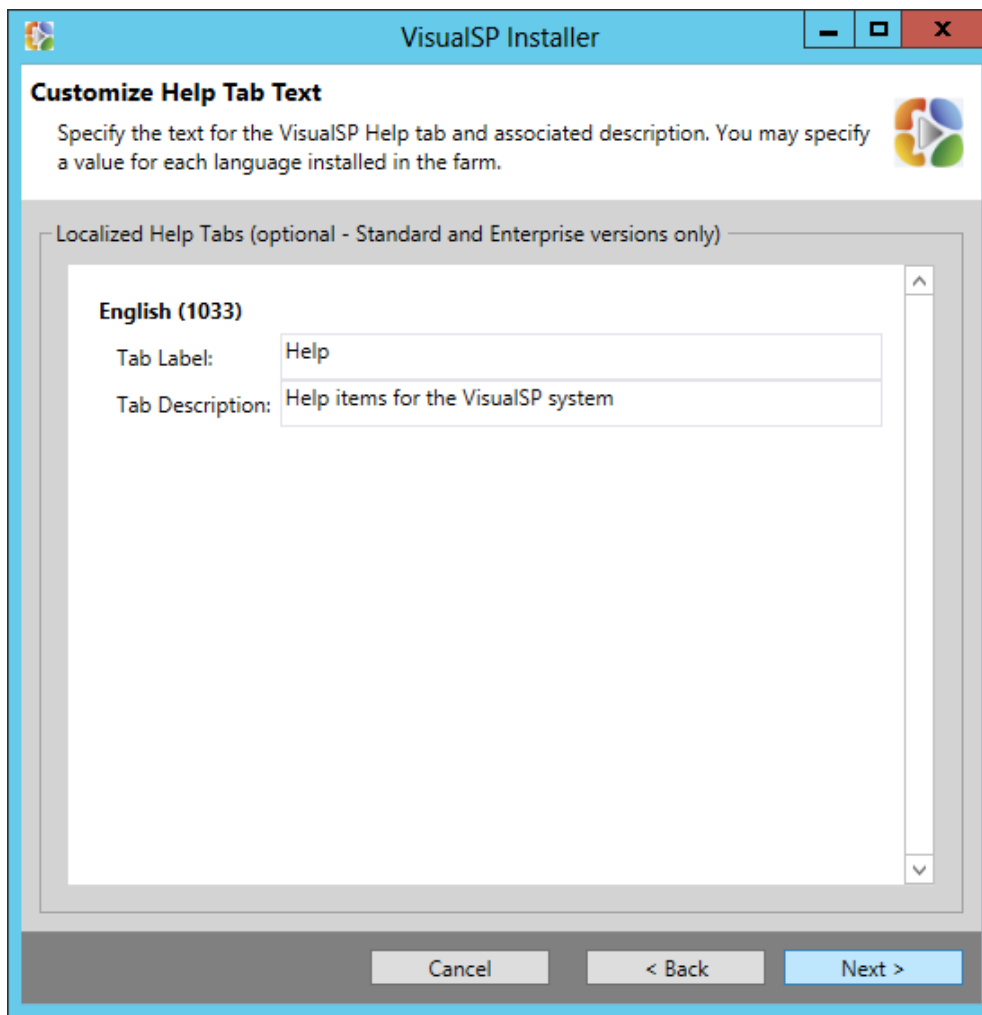
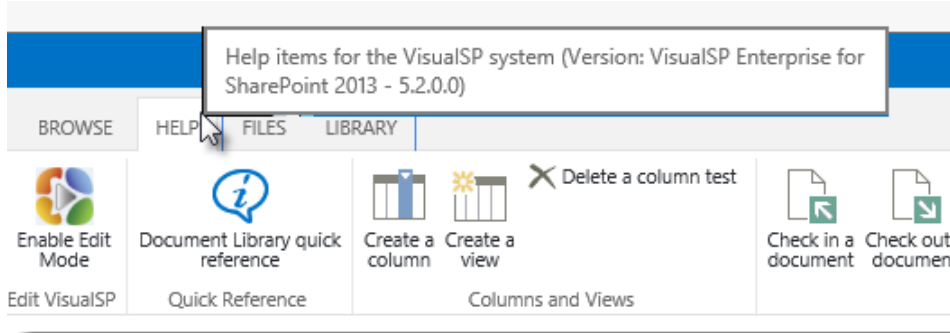
*If you are installing VisualSP Express, you will need to manage Help items at each site collection instead of being able to do it from a central location.*

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

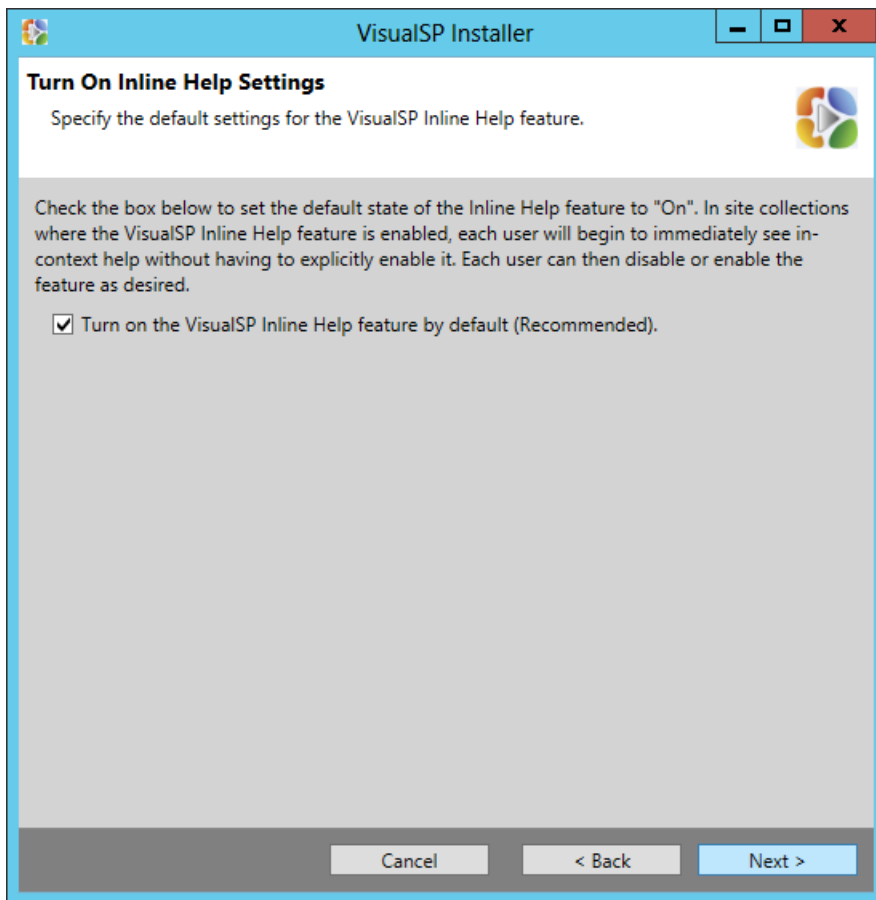
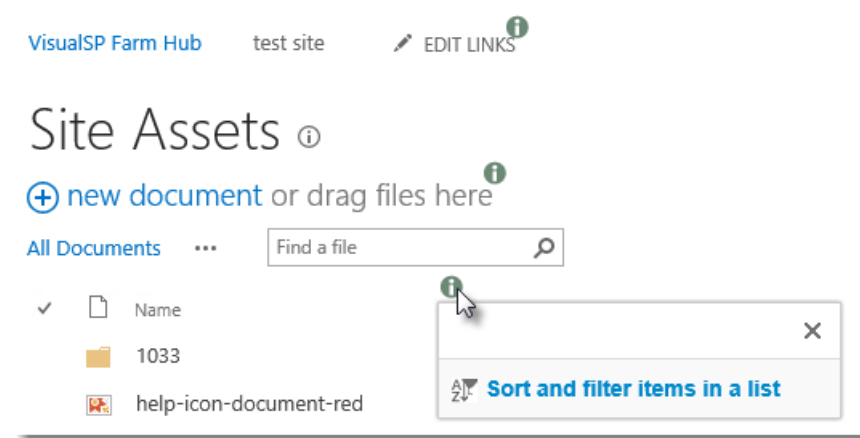
*The list of Help items can be imported by first exporting the list of Help items from the hub. The Help items can also be created one by one and they will start showing up at the appropriate Help location.*

*Please refer to the [customization/evaluation guide](#) to learn more about how to customize the Express version.*

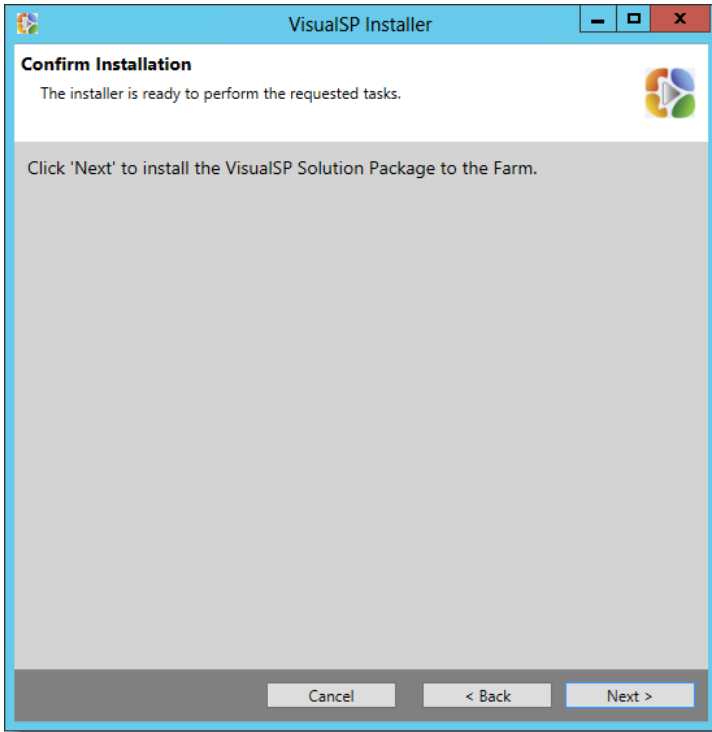
11. On the Customize Help Tab Text screen, enter the name and description you would like to appear on the Help Tab Ribbon. The Tab Description appears when a user moves the mouse cursor over the tab. These can always be changed later. We recommend leaving the default settings unless you have a particular need to change them.



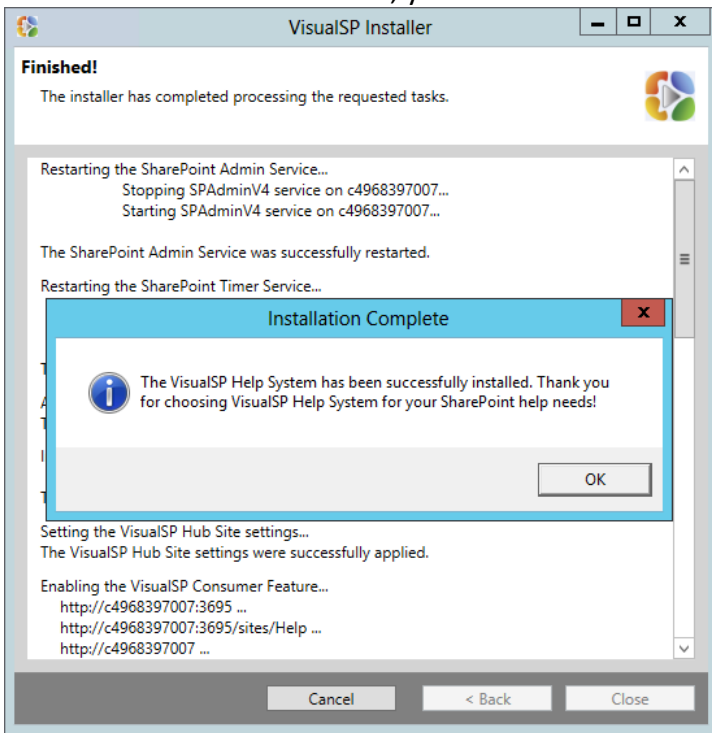
12. On the **Turn on Inline Help Settings** screen, we recommend checking the box to **Turn on the VisualSP Inline Help feature by default**. This setting will cause all site collections where the VisualSP Consumer Feature has been activated to immediately begin to display Inline Help content as shown here. Each individual user can then disable or enable the feature as desired.



13. On the Confirm Installation screen, click **Next**.



14. When the installation finishes, you should see the success message. Click **OK**, and then **Close**.





# Test the Solution

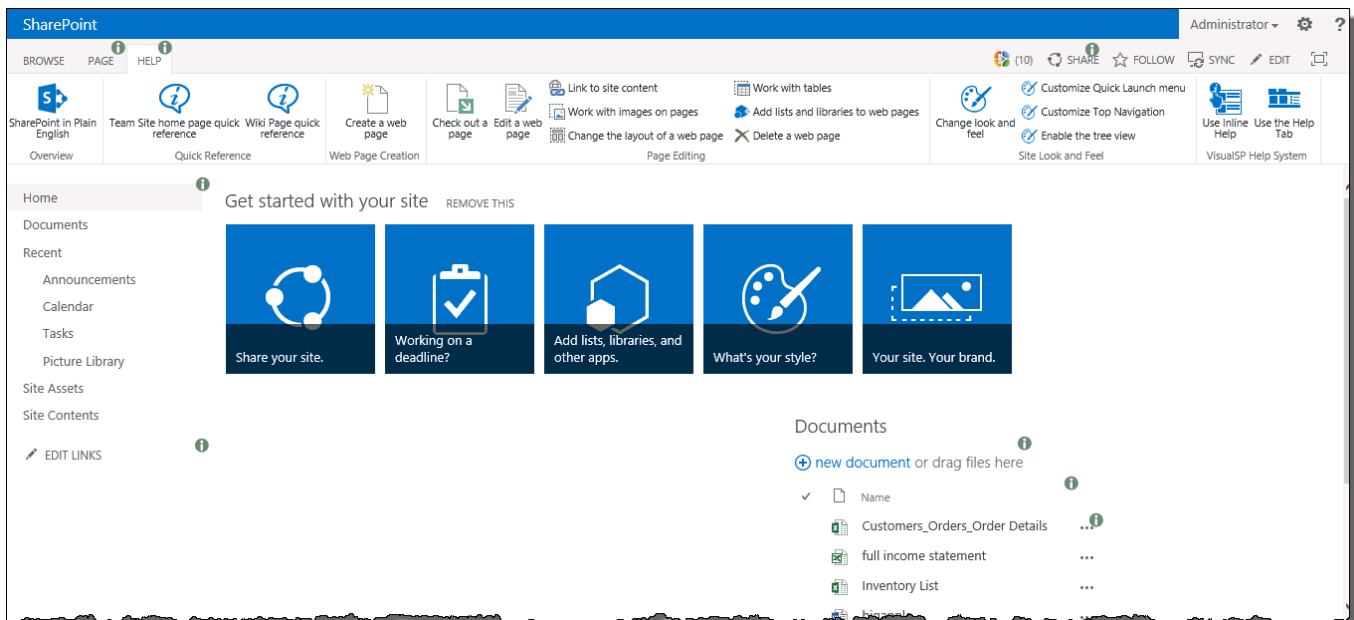
Once the VisualSP Help System is installed, the Help tab and Informational Icons should be available across all site collections if you installed the Standard or Enterprise version and followed the the recommendations in this guide.



*If you installed **VisualSP Express Edition**, Help Items will have to be created in each site collection level before they will display.*

Look for the Help tab and Informational icons in the following types of pages:

1. Web page
2. List and Library pages
3. List and Library Settings pages
4. Site Settings page
5. And more...



Below are a few examples to test out the functionality.



***Note:** The content might differ from below in your installation dependent on your configuration and latest updates.*

# Page

BROWSE		PAGE		HELP		(10)		SHARE	FOLLOW	SYNC	EDIT				
SharePoint in Plain English	Team Site home page quick reference	Wiki Page quick reference	Create a web page	Check out a page	Edit a web page	Work with images on pages	Work with tables	Add lists and libraries to web pages	Delete a web page	Change look and feel	Customize Quick Launch menu	Customize Top Navigation	Enable the tree view	Use Inline Help	Use the Help Tab
Overview	Quick Reference		Web Page Creation	Page Editing		Site Look and Feel		VisualSP Help System							

# Document library

BROWSE		FILES		LIBRARY		(8)		SHARE	FOLLOW						
Document Library quick reference	Create a column	Create a view	Delete a column	Create new documents	Upload a document	Upload multiple documents	Check in a document	Check out a document	Create a document version	Send a document to another library	Discard document check out	Connect a library to Outlook	Email a link to a library	Use Inline Help	Use the Help Tab
Quick Reference	Columns and Views		Creating Documents	Managing Documents		Office Integration	VisualSP Help System								

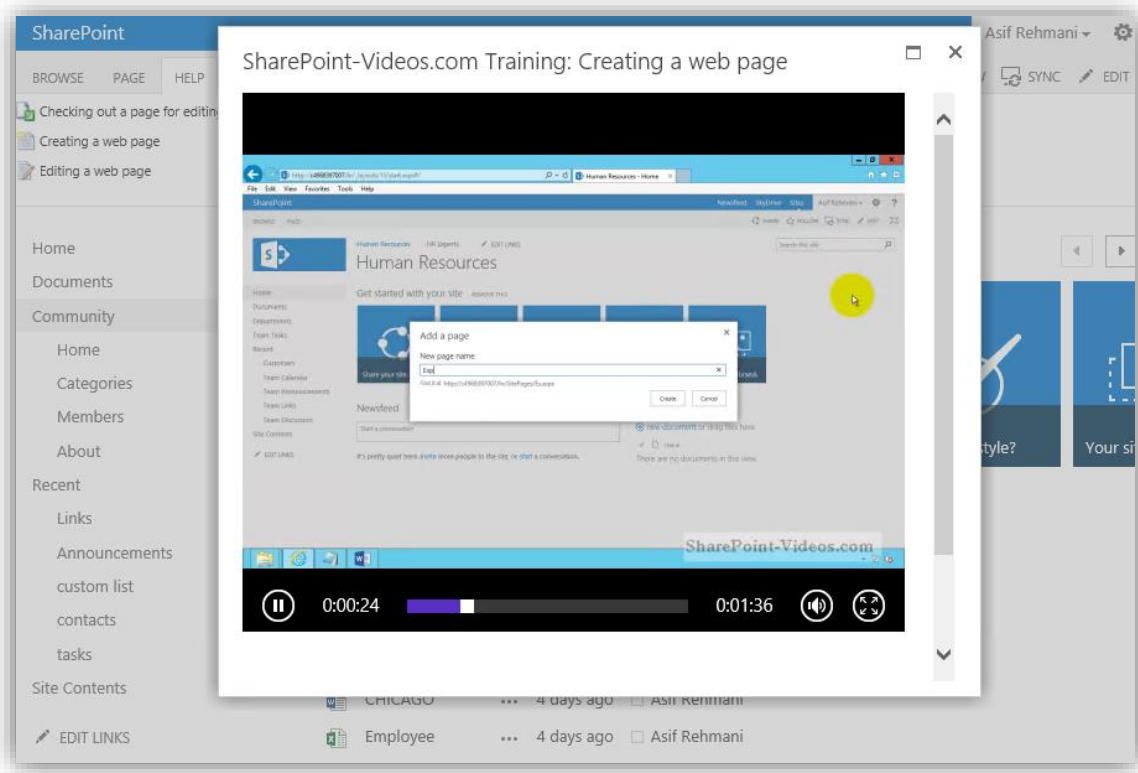
# Tasks list

BROWSE		HELP		TASKS		LIST									
Tasks List quick reference	Create a column	Create a view	Delete a column	Create a Tasks List	Copy from a spreadsheet to a list	Create a list item	Delete list items	Edit a list item	Sort and filter items in a list	Connecting task list to Outlook	Export list data to Excel	Open list data with Access	Use Inline Help	Use the Help Tab	
Quick Reference	Columns and Views		Tasks List Management	General List Videos		Office Integration		VisualSP Help System							

# Calendar list

BROWSE		HELP		EVENTS		CALENDAR		(5)		SHARE	FOLLOW				
Calendar quick reference	Overlay multiple calendars	Use a Group Calendar	Create a Calendar	Create a column	Create a view	Delete a column	Copy from a spreadsheet to a list	Create a list item	Delete list items	Sort and filter items in a list	Connect a calendar to Outlook	Export list data to Excel	Open list data with Access	Use Inline Help	Use the Help Tab
Quick Reference	Calendar Help		Calendar Management	Columns and Views		General List Videos		Office Integration		VisualSP Help System					

## Pop-up dialog box showing video help

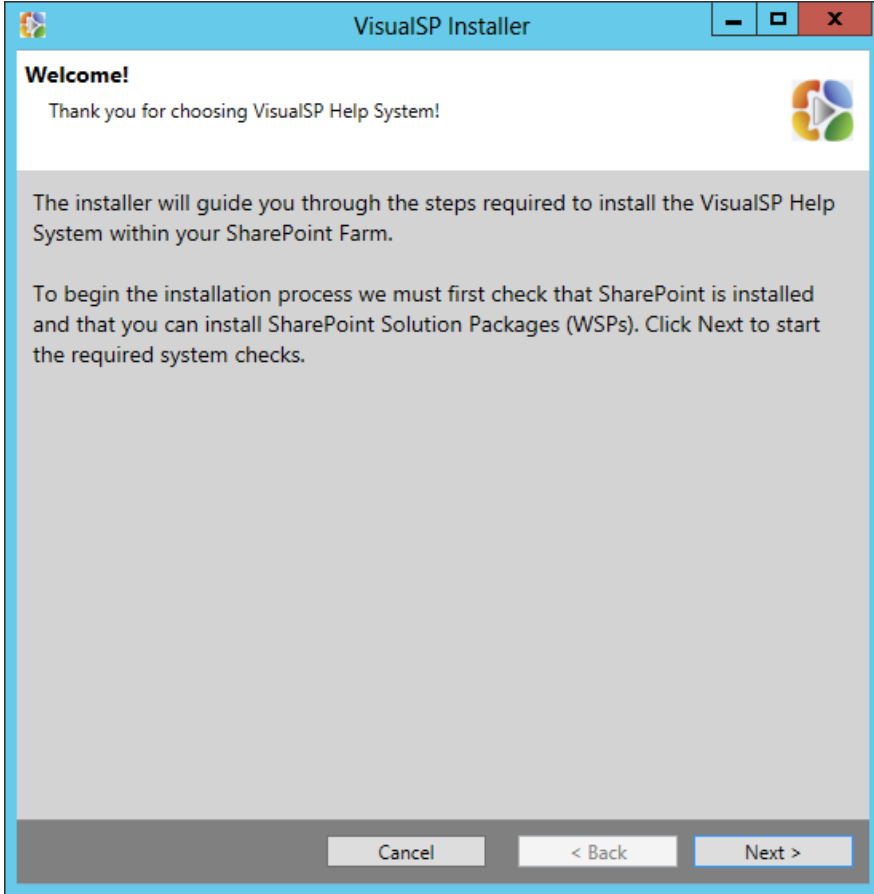


Try out the solution in various site collections within the farm to make sure all videos, documents and images appear as expected.

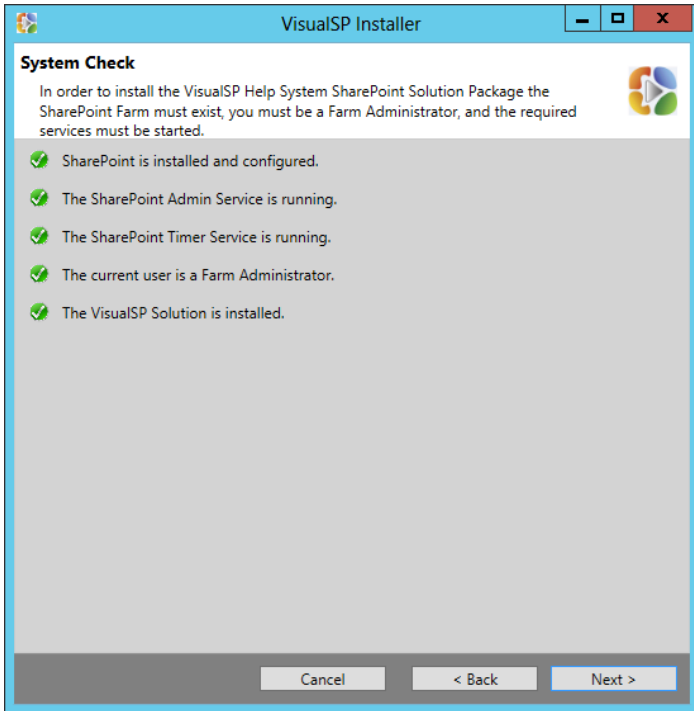
# Un-install VisualSP Help System

If you need to un-install VisualSP for any reason, run the VisualSP installer again.

1. On the Welcome screen, click **next**.



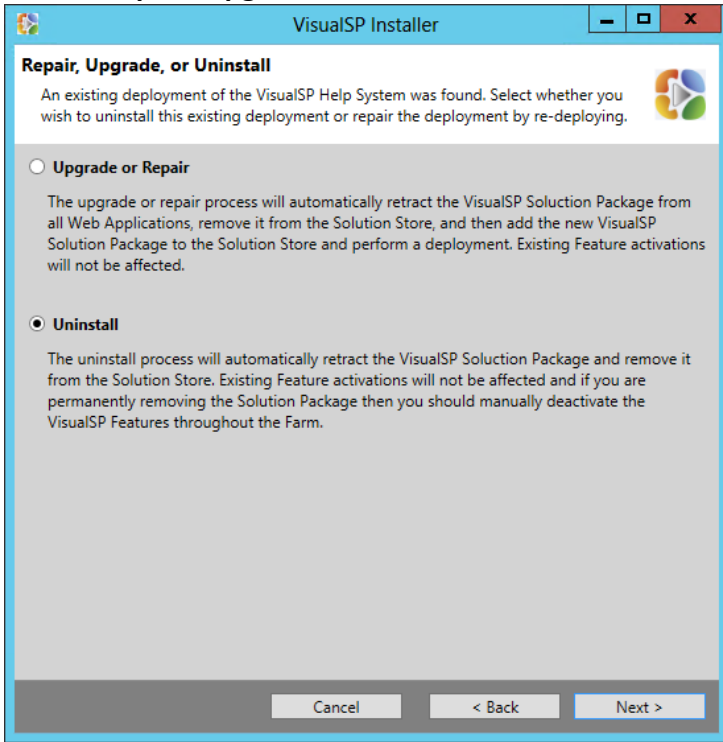
2. **On the System Check screen**, if all system checks pass, click Next to continue. If it encounters issues, correct them and run the installer again. Click **Next** when all items pass the system check.



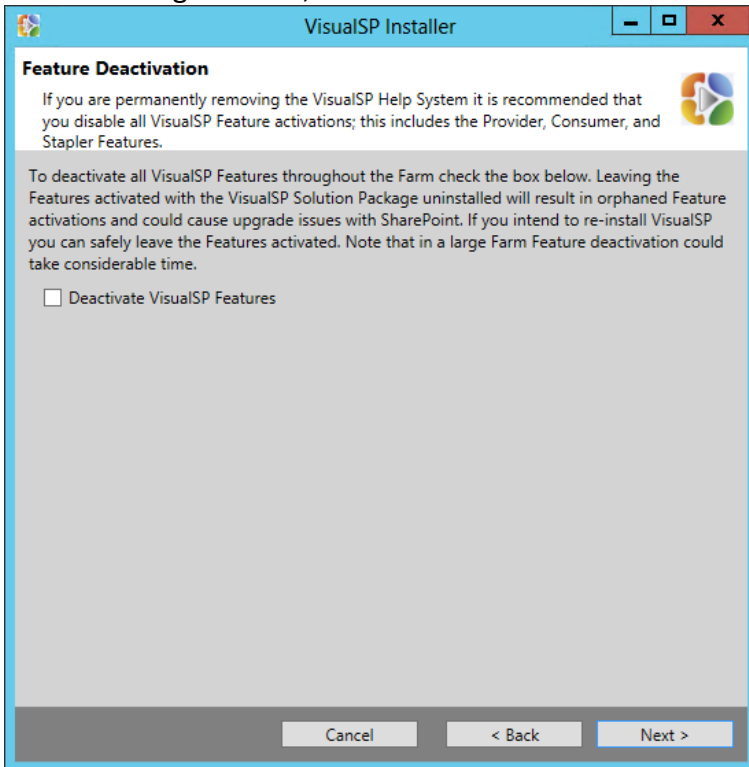
3. **On the EULA screen**, read the End User License Agreement. If you accept the license, click the checkbox to indicate your acceptance and click **Next**.



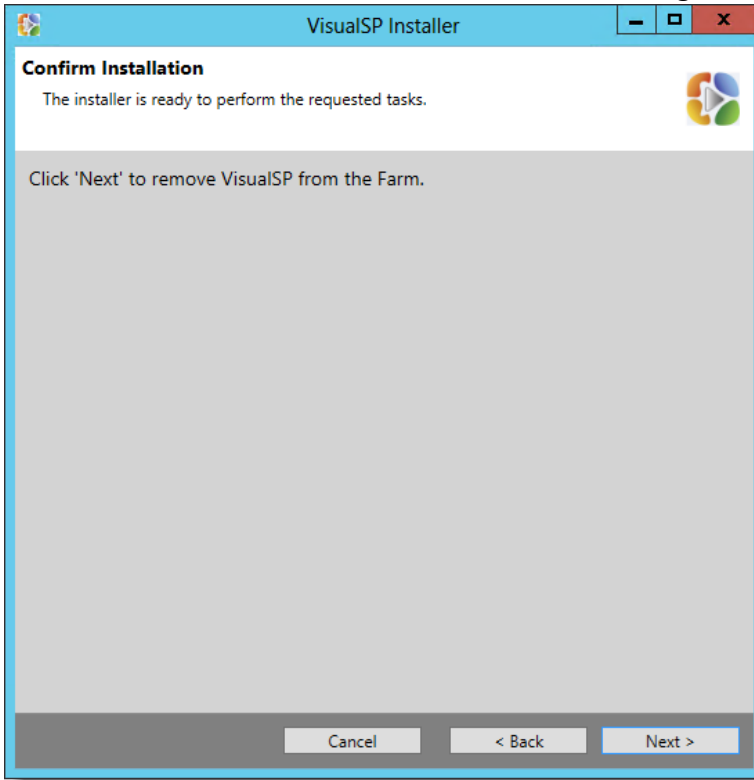
4. On the Repair, Upgrade, or Uninstall screen, select **Uninstall** and click **Next**.



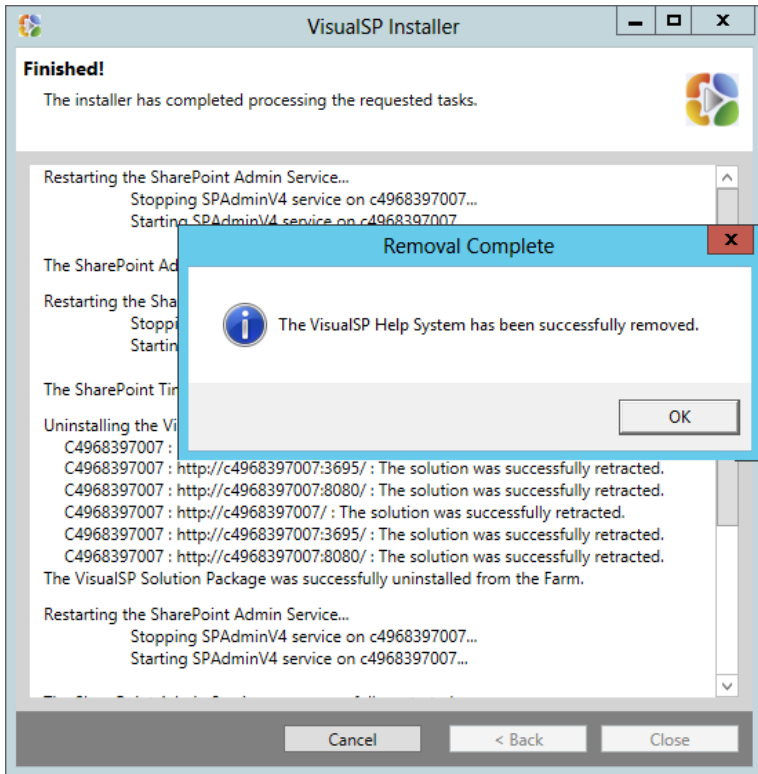
5. On the Feature Deactivation screen, check the box to Deactivate VisualSP Features. If you will be reinstalling VisualSP, it's safe to leave it unchecked.



6. On the Confirm Installation screen, click **Next** to begin uninstalling VisualSP.



7. When VisualSP finishes uninstalling, click **OK**, and **Close**.



**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 don't hesitate to contact us:  
<http://www.VisualSP.com>  
[vsp-support@visualsp.com](mailto:vsp-support@visualsp.com)  
630-786-7026

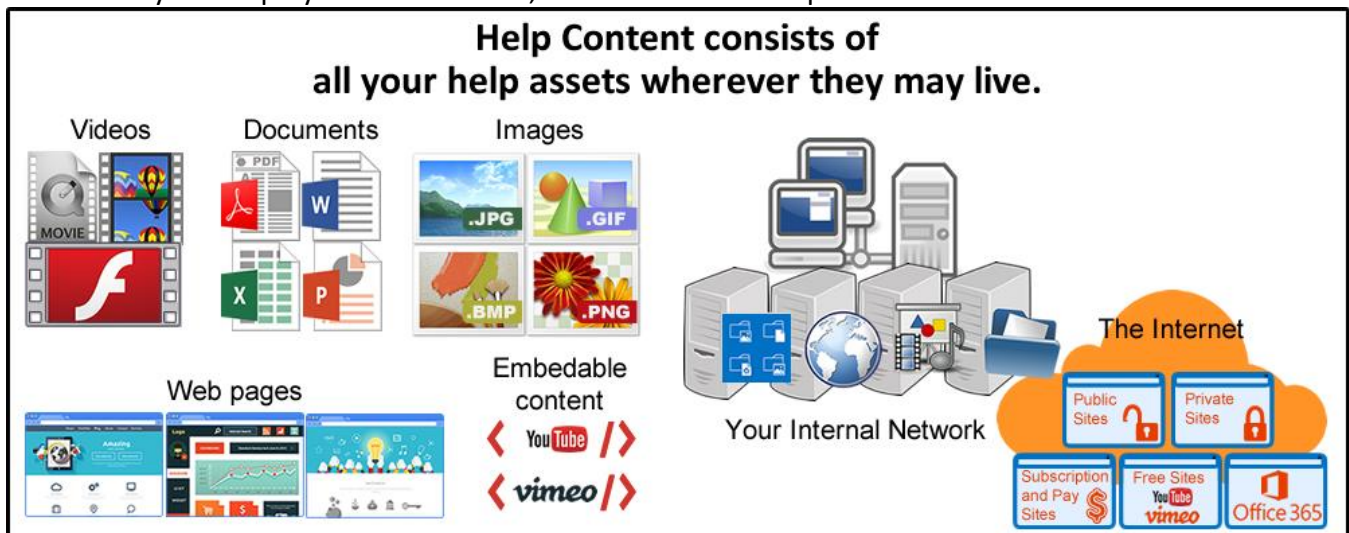
# Appendix A: Overview of VisualSP Help System Architecture

## Architecture

To effectively manage help content in the VisualSP Help System, you need to understand where help items and help content are stored, as well as how help items are provided to and consumed by a particular site collection. Let's take a look at the architecture of the VisualSP Help System and understand some important terms.

### Help Content

Help Content is the instructional content and resources that users need. Individual media items are often referred to as **Help Assets**. The VisualSP Help System supports a variety of different media types such as: videos, images, documents, web pages, and Adobe Flash. You can even use custom EMBED or OBJECT tags to display content from sites like YouTube, Vimeo, and many other sites. Help content can live in any location that your users can access whether locally on your intranet or anywhere on the Internet. If your employees can access it, it can be used as help content.



The VisualSP Help System comes with many professional videos, images, and documents to help your end users make better use of SharePoint. These Help Assets are typically added to the Site Assets library of the VisualSP Farm Hub when VisualSP is first installed.



# Help Items

A Help Item is a definition of how to display a particular Help Asset within the VisualSP Help System. It links to the Help Content but doesn't *contain* the Help Content. A Help Item also defines how the content will appear to the user, such as which viewer to use and if it will be displayed in the VisualSP dialog box or opened in a new window. It defines all the aspects of how the links to the content are displayed in the VisualSP Help Ribbon and/or Inline Help.

**Help Items tell VisualSP how to link to specific Help Content and how to display that help content to end users when and where they need it.**

*Help Items displayed in the Help Ribbon.*

*Help Items displayed in the Inline Help Menu.*

*Help Content displayed in the VisualSP Viewer popup.*

# Manage VisualSP Help Items List

Help Items are stored in a special SharePoint List called the **Manage VisualSP Help Items List**. When VisualSP is installed, and the provided Help Content is uploaded, pre-defined Help Items are also added to the Manage VisualSP Help Items List in the VisualSP Farm Hub.

**Help Items live in a VisualSP Help Items list.**

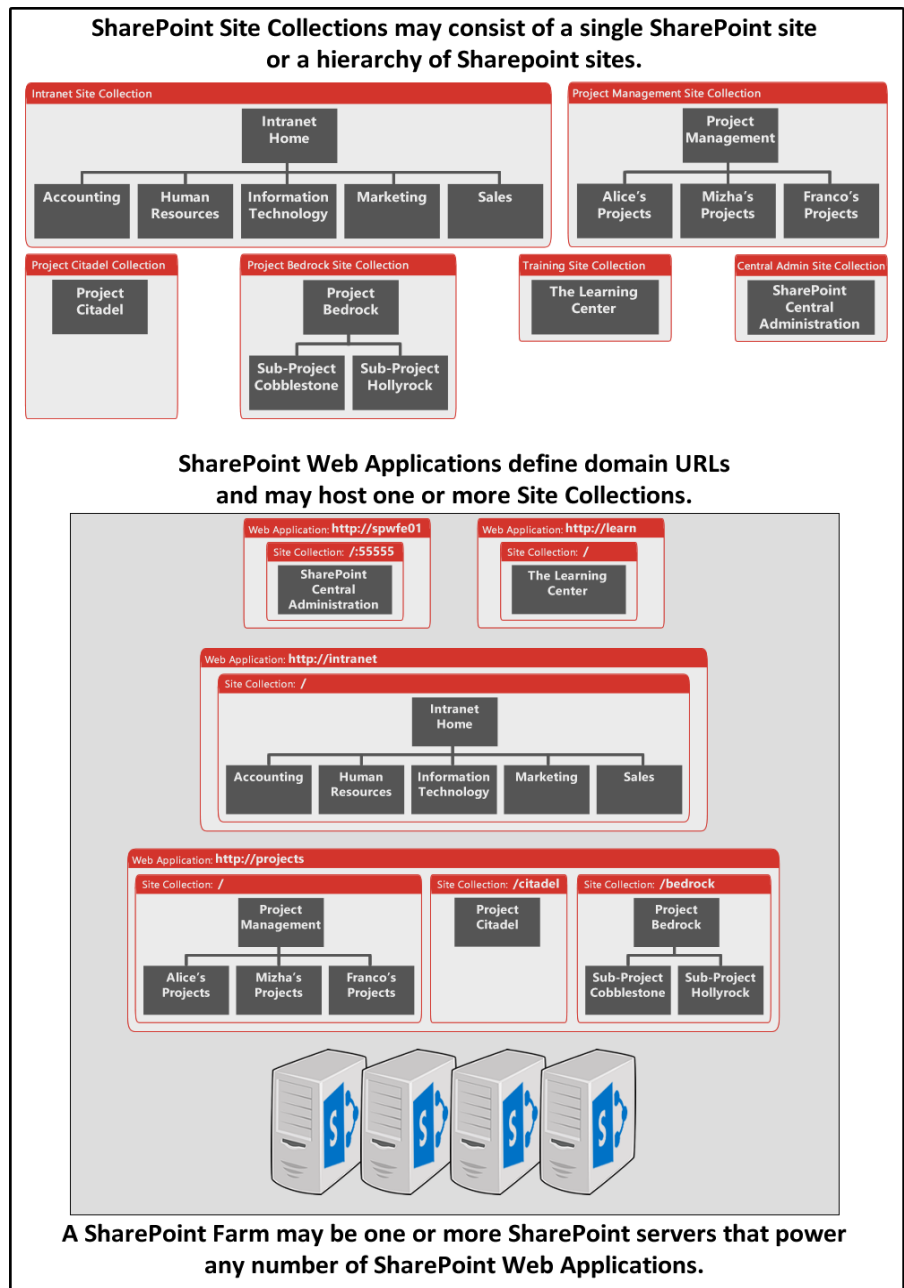
Icon	Title	Group	Size	Viewer	Sequence	Scope	Inline Help Target	Permissions
	Add a library to the Quick Launch	Library Look and Feel	Medium	Default Video Player		none	Calendars in View, RegularExpressionInlineHelp	
	Add a library to the Quick Launch	Library Look and Feel	Large	Default Video Player	30	InlineTargetsOnly	Navigation bars - Edit Links	
	Add a list to the Quick Launch	List Settings	Medium	Default Video Player		List Settings Page		

# Site Collections, Web Applications, and the SharePoint Farm

All SharePoint sites have to be in a SharePoint Site Collection. A SharePoint Site Collection is a group of SharePoint sites that share a common set of resources between them. It typically consists of many sites that are arranged in a hierarchical manner. However, it could also be a unique and separate, single SharePoint site. The Site Collection is the lowest level at which the VisualSP Help System can be managed.

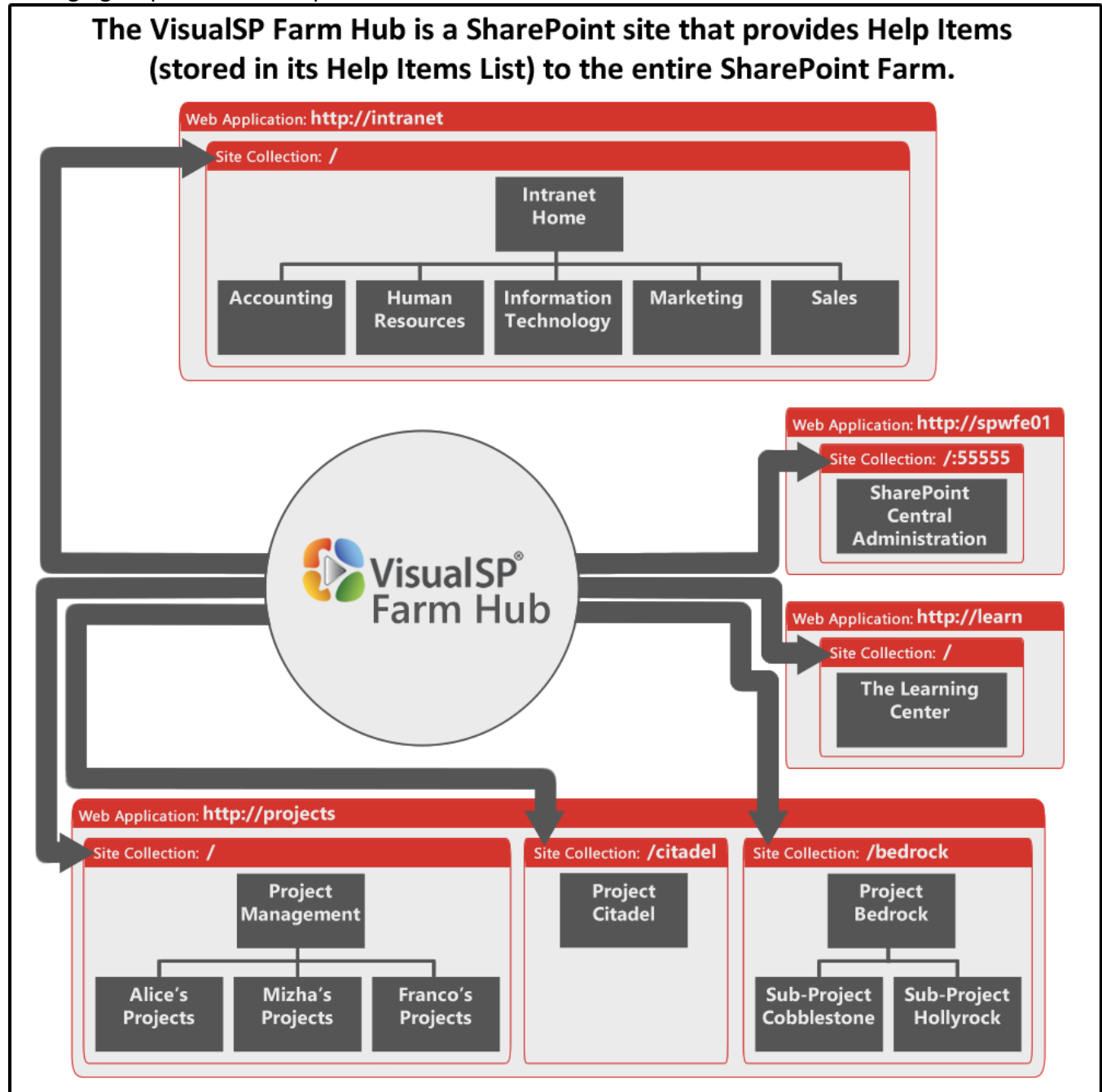
If you are unfamiliar with what a SharePoint Web Application is, just think of it as a base URL in SharePoint, that is, everything in the URL before the first forward slash (/). For example, you may have one web application with URLs that begin with **http://intranet** and another web application with URLs that begin with **http://projectsweb**. These are two different web applications and each may contain numerous site collections.

A SharePoint Farm may be one or more SharePoint Servers that work together to power and manage any number of SharePoint Web Applications. Most organizations have only one production SharePoint Farm, but some organizations have multiple SharePoint Farms, depending on their needs.



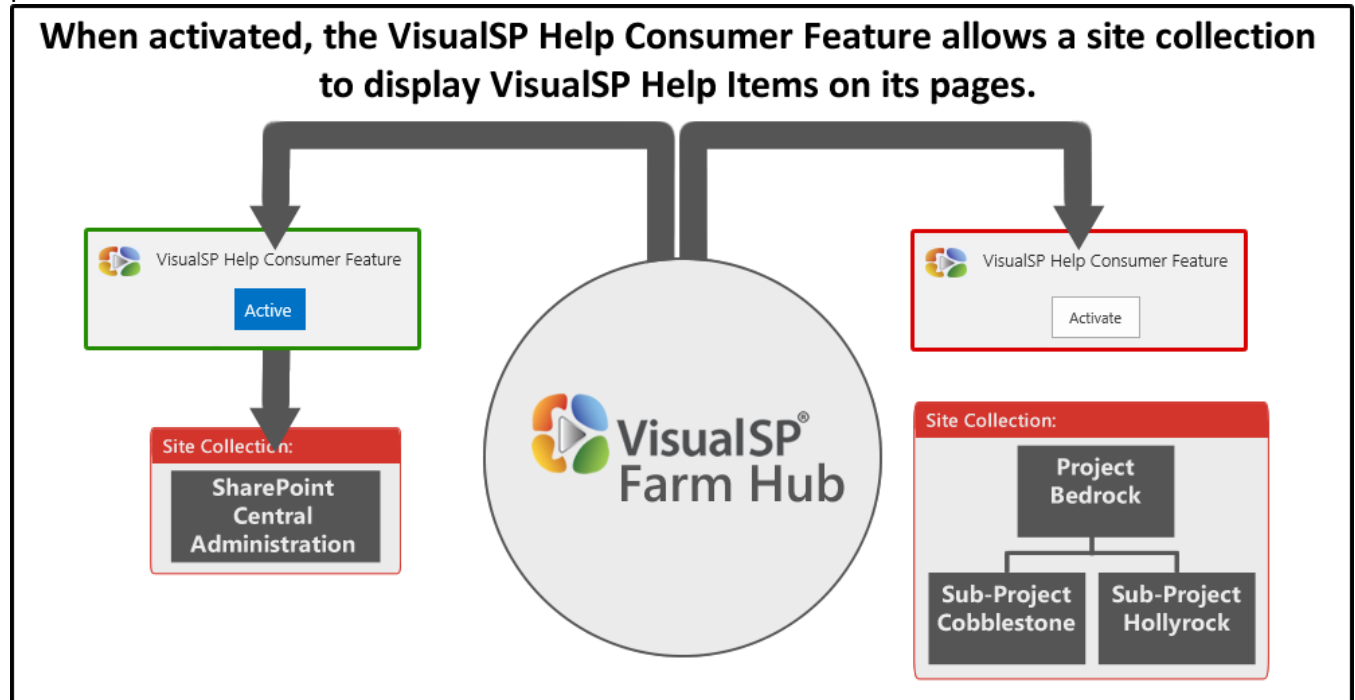
## The VisualSP Farm Hub

When VisualSP is first installed, the SharePoint Administrator creates a site collection to serve as the VisualSP Farm Hub. This site collection is designed to serve as the central location for storing and managing help items and help content the SharePoint Farm.



## VisualSP Help Consumer

The VisualSP Help Consumer Feature must be activated on a site collection before it can display VisualSP Help to its users. Once activated, Inline Help can also be enabled or disabled for that particular site collection.

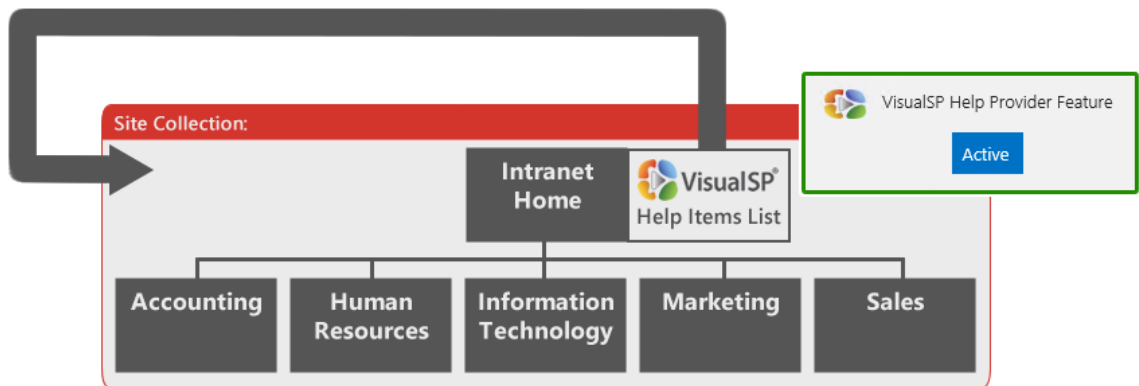


## VisualSP Help Provider

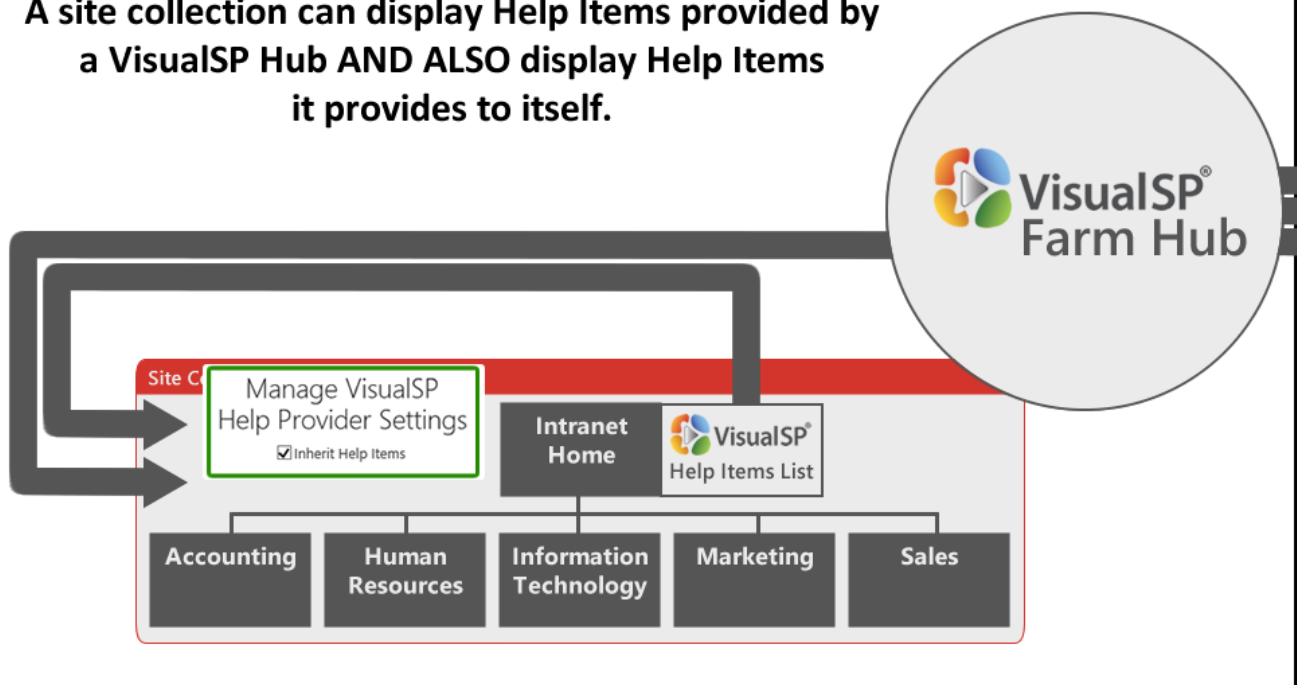
This is a SharePoint Site Collection Feature that tells VisualSP how to serve up (or provide) the items in the VisualSP Help Items list to itself as well as other site collections that may inherit from this one. In the VisualSP Help Provider, you can enable inline help to be provided, enable or disable caching, and change the inline help icon to a custom icon.

Each Site Collection typically inherits help items from the VisualSP Farm Hub. If the VisualSP Provider Feature is activated on the site collection, the site collection may also have its own unique Help Items in addition to the Help Items it is inheriting.

**When Activated, the VisualSP Help Provider Feature creates a VisualSP Help Items list in the site collection. Help Items added to this list will be provided within this site collection.**



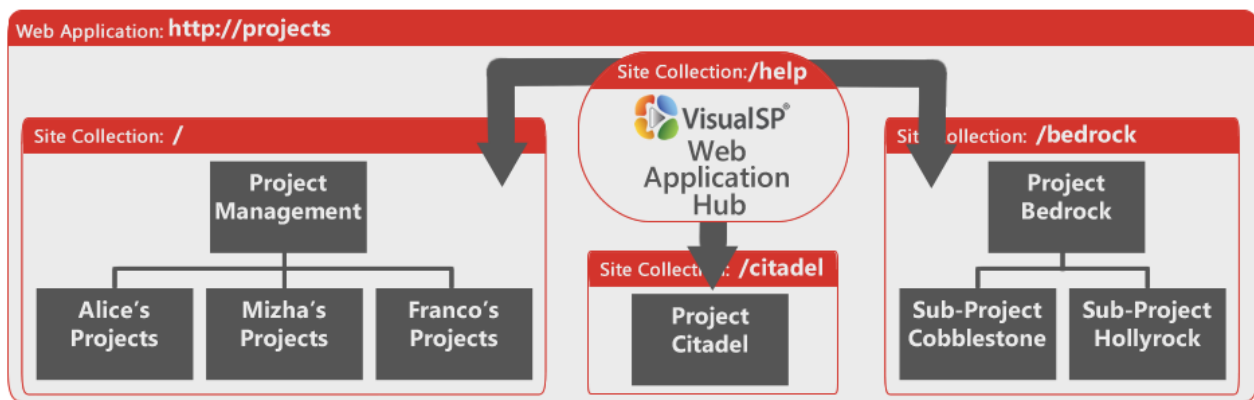
**A site collection can display Help Items provided by a VisualSP Hub AND ALSO display Help Items it provides to itself.**



## VisualSP Web Application Hub

A SharePoint Farm can have only one VisualSP Farm Hub, but it can have as many VisualSP Web Application Hubs as it does SharePoint Web Applications. Each VisualSP Web Application Hub, can provide help content to all the site collections that are in that particular web application. It typically inherits help items from the VisualSP Farm Hub and may also have its own help content and help items that are unique to that particular web application. Each site collection may also have its own Help Items as well.

**Each web application may have one site collection designated to be a VisualSP Web Application Hub. Help Items in this site collection will be provided to all site collections that are part of that web application.**



## Example Diagram of a Fully Deployed VisualSP Help System

