

Install VisualSP Classic onto SharePoint 2016

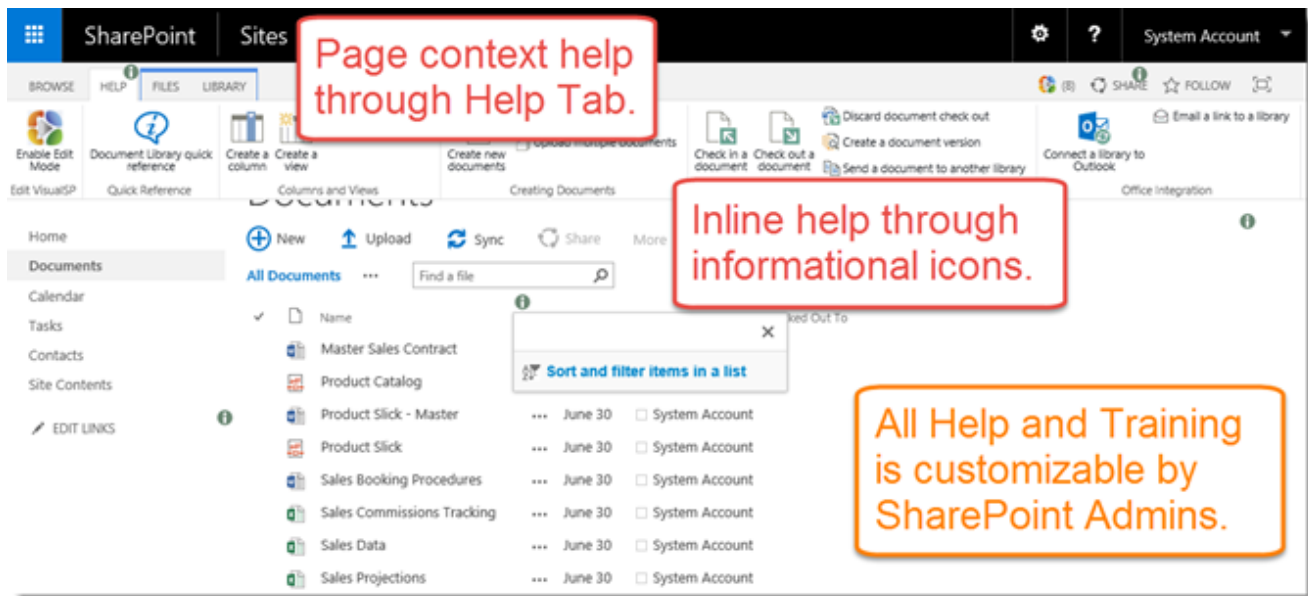
support.visualsp.com/knowledge-base/visualsp-help-system-2016-installation-procedure/

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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.



It is very important to follow all steps **exactly** as they appear below. After installation, please refer to the customization articles to learn how to customize the system to your needs.

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 3rd 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

Note: *Installation files are available in the **VisualSP Customer Portal**. You will need to login with the account provided to you at time of purchase to get access to the portal.*



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

The installation requires two files:

- **exe** – VisualSP Help System Installer application
- **zip** - VisualSP Help System farm hub content containing videos, documents and images (trial version file: **VisualSP2016HelpItems_trial.zip**)

Note: Do not unzip the VisualSP2016HelpItems.zip file!



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

SharePoint 2016 Videos list

Help Content layout in SharePoint interface

Create the VisualSP Farm Hub Site Collection

Web Application
Select a web application.
To create a new web application go to [New Web Application](#) page.

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.
To add a new URL Path go to the [Define Managed Paths](#) page.

Template Selection
Select a template:

Collaboration Enterprise Publishing Custom

Team Site
Blog
Developer Site
Project Site
Community Site

A place to work together with a group of people.

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.



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 **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.

1.
 - 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 grayed 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.
 1. 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.
 2. 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.
 3. Click **Next**.

9. On the Select Help Provider Hub Sites screen:

1. 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*.
2. 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. Click **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:

11. Check the box **beside Upload content to a content hub**.
12. For the Help Content File, click the **browse** button, select the **c:\VisualSP\VisualSP2016HelpItems.zip** you uploaded to the server earlier.
13. For **Locale**, leave the **English** option selected.
14. In the **Help Content section**,
15. 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.
16. 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.
17. In the **Help Ribbon Items section**,
18. 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.

19. 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 VisualSP*** article for instructions) so you can safely check the box to overwrite those items.
20. 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 articles to learn more about how to customize the Express version.

21. 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.
22. 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.
23. **On the Confirm Installation screen, click *Next*.**
24. When the installation finishes, you should see the success message. Click ***OK***, and then ***Close***.

Note

If you are licensed for the Enterprise version you will need to Activate Analytics for Enterprise On-Prem for the first time.

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 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

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.

De-Activate VisualSP Help System

In a Site Collection

If you would like to de-activate VisualSP so that it is hidden, there are two features in each site collection that can be turned on or off. If you go to Site Settings > VisualSP Settings:

Manage VisualSP Help Provider Settings

is the one that enables the help tab in the ribbon. Uncheck the “Inherit Help Items” box. This will also remove the inline help items.

If you want to only deactivate in-line help, click on **Manage VisualSP Help Consumer Settings** and uncheck “Enable Inline Help” to deactivate it.

From Central Administration

If you would like to turn off VisualSP everywhere, go to Central Administration > System Settings > Manage farm features.

Scroll to the bottom and Deactivate *VisualSP Central Admin Feature* and *VisualSP Help Feature Stapler*:

Go back to System Settings > Manage farm solutions:

Click on the wsp solution:

On the Solutions Properties page, click on **Retract Solution**:

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
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:

<https://www.VisualSP.com>

support@visualsp.com

630-786-7026

Appendix A: Overview of VisualSP Help System 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.

| **Note:** VisualSP On-Prem is a full trust solution.



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.

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.

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://projectswb**. 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.

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.

Example Diagram of a Fully Deployed VisualSP Help System
