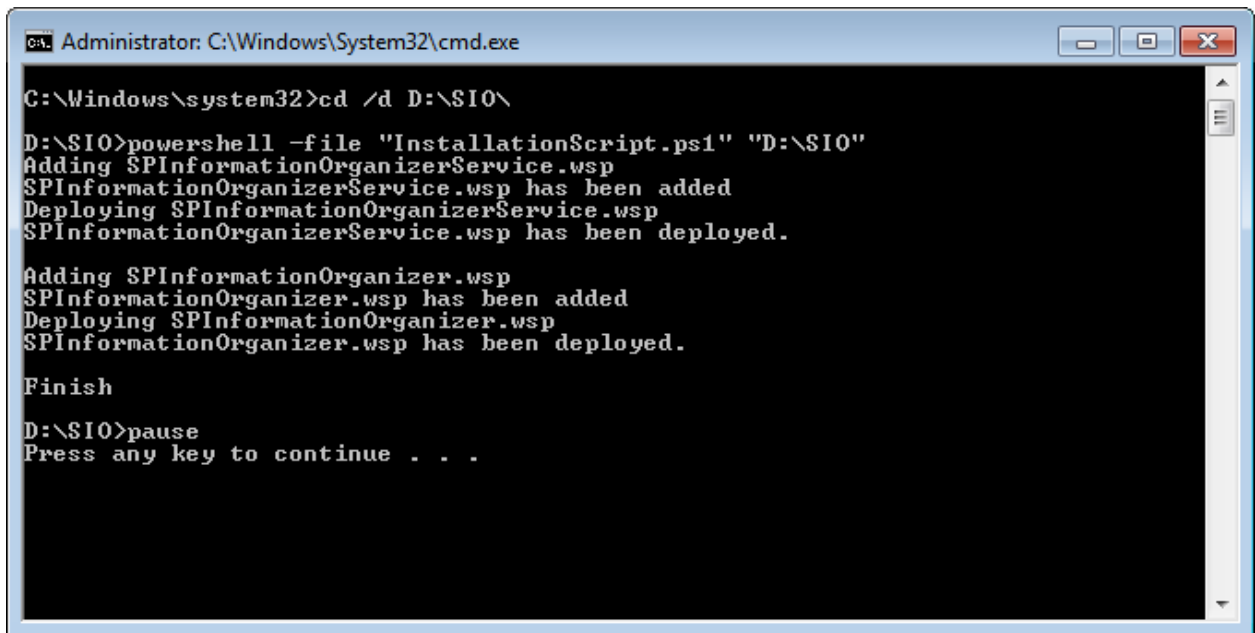


## How to install SharePoint Information Organizer

### Install through batch file:

1. To install SharePoint Information Organizer launch the **Installer.bat** file. Launch the batch file with elevated context (**Run as Administrator**).
2. The installation process will be shown in command prompt as given below,



```
C:\Windows\system32>cd /d D:\SIO\  
  
D:\SIO>powershell -file "InstallationScript.ps1" "D:\SIO"  
Adding SPInformationOrganizerService.wsp  
SPInformationOrganizerService.wsp has been added  
Deploying SPInformationOrganizerService.wsp  
SPInformationOrganizerService.wsp has been deployed.  
  
Adding SPInformationOrganizer.wsp  
SPInformationOrganizer.wsp has been added  
Deploying SPInformationOrganizer.wsp  
SPInformationOrganizer.wsp has been deployed.  
  
Finish  
  
D:\SIO>pause  
Press any key to continue . . .
```

3. Once the installation is complete, launch Manage service applications web page from the central administration site by clicking on Manage service applications under Application management in the central administration site.
4. Then click on New -> SP Information Organizer Service from the ribbon. SP Information Organizer Service modal dialog box appears like shown below,

**SPInformation Organizer Service Application**

Create new SPInformation Organizer Service Application Help

**Name**  
Specify the name of this service application instance.

Service Application Name

**Database**  
Use of the default database server and database name is recommended for most cases. Refer to the administrator's guide for advanced scenarios where specifying database information is required.  
  
Use of Windows authentication is strongly recommended. To use SQL authentication, specify the credentials which will be used to connect to the database.

Database Server

Database Name

Database authentication

☒ Windows authentication (recommended)

☐ SQL authentication

Account

Password

**Application Pool**  
Choose the Application Pool to use for this Service Application. This defines the account and credentials that will be used by this web service.  
  
You can choose an existing application pool or create a new one.

☐ Use existing application pool

☒ Create new application pool

Application pool name

Select a security account for this application pool

OK Cancel

Fill in the desired Service application name, Database name, and the application pool where you want to install the service application and then Click Ok.

- After creating the service application, ensure whether the **SP Information Organizer Service** is started in Central administration site by opening,

System settings -> Manage services on server in Central Administration site.

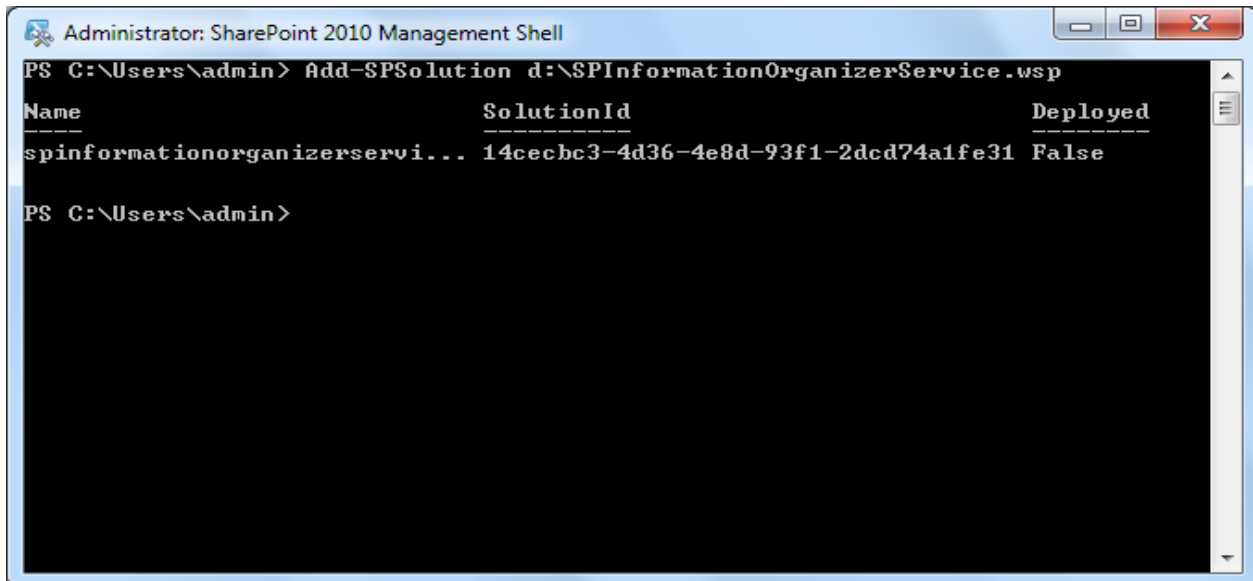
- To activate the SharePoint Information Organizer feature click on Site Actions -> Site Settings -> Site Collection Administration -> Site Collection features and activate the SPInformation Organizer feature.
- Now the SPInformation Organizer can be launched from site actions menu or from site settings page of the web application where the SPInformation Organizer is installed.

**Note 1: The user who installs the SharePoint Information Organizer must a member of Administrators group in the server, and also a Farm administrator in the local farm.**

## Manual Installation:

### Steps for installing SharePointInformationOrganizerService.wsp:

1. Launch SharePoint management shell by clicking Start -> Programs -> Microsoft SharePoint 2010 products -> SharePoint 2010 Management Shell. Launch the application with elevated context (**Run as Administrator**).
2. Type the following command for adding the solution to the farm store,  
**Add-SPSolution "literal path with extension"**  
Eg: **Add-SPSolution d:\SPInformationOrganizerService.wsp**

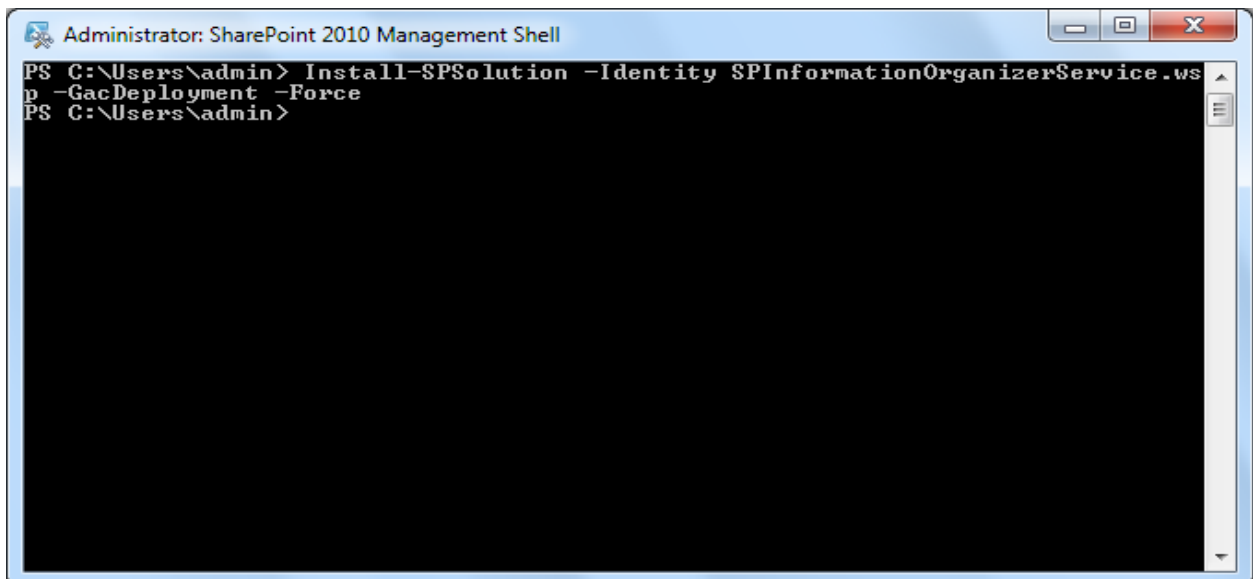


```
Administrator: SharePoint 2010 Management Shell
PS C:\Users\admin> Add-SPSolution d:\SPInformationOrganizerService.wsp
Name                               SolutionId                         Deployed
-----                               -
spinformationorganizerservi... 14cecbc3-4d36-4e8d-93f1-2dcd74a1fe31 False
PS C:\Users\admin>
```

3. To install the solution in a particular web application:

**Install-SPSolution -Identity "wsp name.wsp" -GacDeployment -Force**

E.g. **Install-SPSolution-Identity spinformationorganizerservice.wsp -GacDeployment -Force**



```
Administrator: SharePoint 2010 Management Shell
PS C:\Users\admin> Install-SPSolution -Identity SPInformationOrganizerService.wsp -GacDeployment -Force
PS C:\Users\admin>
```

4. Launch Manage service applications web page from the central administration site by clicking on the Manage service application under Application management in the central administration site.
5. Click on New -> SP Information Organizer Service from the ribbon. SP Information Organizer Service modal dialog box appears as shown below,

**SPInformation Organizer Service Application**

Create new SPInformation Organizer Service Application [Help](#)

**Name**  
Specify the name of this service application instance.

**Database**  
Use of the default database server and database name is recommended for most cases. Refer to the administrator's guide for advanced scenarios where specifying database information is required.  
  
Use of Windows authentication is strongly recommended. To use SQL authentication, specify the credentials which will be used to connect to the database.

**Service Application Name**  
[Text Box]

**Database Server**  
[Text Box]

**Database Name**  
[Text Box]

**Database authentication**  
☒ Windows authentication (recommended)  
☐ SQL authentication  
 Account [Text Box]  
 Password [Text Box]

**Application Pool**  
Choose the Application Pool to use for this Service Application. This defines the account and credentials that will be used by this web service.  
  
You can choose an existing application pool or create a new one.

☐ Use existing application pool  
[Dropdown Menu]

☒ Create new application pool  
 Application pool name [Text Box]  
 Select a security account for this application pool [Text Box]

OK Cancel

Fill in the desired Service application name, Database name, and the application pool where you want to install the service application and then Click OK.

6. After creating the service application, check whether the service is started in Central administration site by opening,

System settings -> Manage services on server in Central Administration site.

7. Activate the '**SP Information Organizer Service**' feature from Manage farm features page of the Central Administration site by opening,

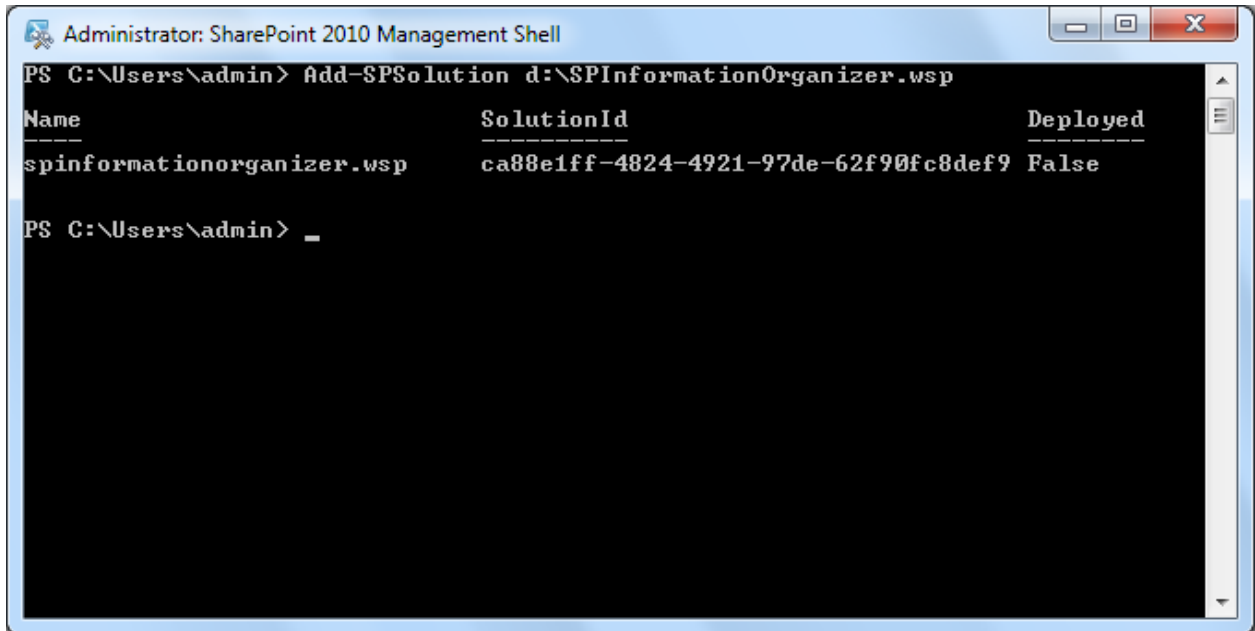
System settings -> Manage farm features -> SP Information Organizer Service -> Activate

### Steps for installing SharePointInformationOrganizer.wsp:

1. Launch SharePoint management shell by clicking Start -> Programs -> Microsoft SharePoint 2010 products -> SharePoint 2010 Management Shell. Launch the application as administrator.
2. Type the following command for adding the solution to the farm store,

**Add-SPSolution -LiteralPath "file location"**

E.g. Add-SPSolution d:\solution\SPInformationOrganizer.wsp



3. To install the solution in a particular web application:

**Install-SPSolution -Identity "wsp name" -WebApplication "url" -GacDeployment -Force**

E.g. **Install-SPSolution -Identity spinformationorganizer.wsp -WebApplication "url" -**

**GacDeployment -Force**

4. To install the solution in All Web Applications,  
**Install-SPSolution Identity "wsp name" -AllWebApplications -GacDeployment -Force**
5. SharePoint Information Organizer application installation is now complete after the above steps have been executed successfully.
6. To activate the SharePoint Information Organizer feature click on Site Actions -> Site Settings -> Site Collection Administration -> Site Collection features and activate the SPInformation Organizer feature.
7. SharePoint Information Organizer is now ready to be launched from site actions menu or from site settings page of the web application where the SPInformation Organizer is installed.

**Note 1: SharePointInformationOrganizer.wsp will be installed at the web application level. If you want to install for multiple web applications, follow the same steps of installation for each web application.**

**Note 2: During the evaluation period, the evaluation is limited to one site collection. Once the SPInformation Organizer is launched, you will be redirected to the registration page, where you should select the site collection on which you would like to perform the evaluation the product. After selecting a site collection, user will be redirected to main page.**

**Note 3: Once selected, the user cannot change the Site Collection.**