



## Installation and Configuration Manual





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## Version History

### Change Record

Date	Author	Version	Change reference
2018, June	SharePoint Page Guide	1.0.0.0	Initial Release for SharePoint Online.

### Current Version for SharePoint Online

Name	Version Approved	Compatibility	Date
SharePoint Page Guide	SharePoint Page Guide Version 1.0.0.0	SharePoint 2013, SharePoint 2016, SharePoint Online / Office 365.	2018, June



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## Introduction

**SharePoint Page Guide** is the advanced version of SharePoint Page Tour with more features to create stunning interactive help within your SharePoint pages (such as themes, highlighting multiple targets at the same time and different shapes of highlighting).

SharePoint Page Guide is the simple, fast and most effective way to incorporate interactive help within your SharePoint pages by way of step-by-step walk-through for selected page elements. SharePoint Page Guide helps SharePoint users to learn and understand the platform and applications built on top of SharePoint interactively, with live contextual help.

SharePoint Page Guide is extremely powerful and precise. The add-in includes the Page Guide Builder from where you can add contextual help to any SharePoint page element. Just Select unique attribute such as element id (#elementid), ClassName (.className), Data-name (uniquedataname) or specify the single element HTML without any events.

One of the major benefits of using this step-by-step walk-through is a dramatic decrease in the number of support calls and tickets with requests for help relating to the application to which it is available. SharePoint Page Guide can be used for many use cases (e.g. change management, on-boarding, training, support etc.) and will add benefit to any SharePoint application.

### How does SharePoint Page Guide Work?

After you have installed **SharePoint Page Guide**, you will be able to use the Page Guide Builder to create a Page Guide by selecting the unique page elements that you would like to highlight and add contextual help (text, photos, audio and videos are also supported). Each page element is mapped to a step with your desired help content. Each step can be customised with options and unlimited steps can be created, you can even set a step to another page and specific element! Once you have completed your Page Guide you can save page guide details. You can add page guide on your SharePoint Page via the SharePoint Page Guide Web Part. Each Page Guide is saved within SharePoint and can be opened to edit as required. Edited Page Guides will automatically reflect changes without the need to re-configure the SharePoint Page Guide webpart.

### SharePoint Page Guide Uses:

Do you use SharePoint to display important information and allow process functionality for your organisation? With SharePoint Page Guide you can easily construct in-page contextual help and use cases include; SharePoint Training, Onboarding process for SharePoint Intranet, SharePoint Intranet navigation, SharePoint Application Platforms.

## SharePoint Page Guide Benefits and Features

- Highlight multiple targets at same time
- Autopilot (automatic switching of steps with progress bar)
- Start Page Guide using custom form link in Page
- Build Page Guide across multiple pages
- Auto start of Page Guide for first time
- Works with all modern browsers
- Material design
- Responsive
- Ability to continue the unfinished page guide
- Control of Buttons Text
- Map of all page guide Steps
- Works with dynamic content
- Localization
- Highlighting of passed steps
- Create intro slide in centre of screen
- Auto Positioning of Message
- Themes / Styling
- 37 Positions' Variants
- Display Page Guide covers
- Text, Image, Audio or Video Content
- 3 different shapes to highlight: rectangle, circle and rounded rectangle
- Control of colour and transparency of the overlying layer for each step
- Detailed documentation and page guide about the page guide builder

## SharePoint Page Guide Installation

### Types of License

**SharePoint Page Guide** is made available from the Office Store (per user licence) and directly from Cirrus Soft (for Site, Site Collection and Farm/Tenant license)

### Installing SharePoint Page Guide

To add an app from the SharePoint Store

1. Verify that the user account that is performing this procedure is a member of the site Owners group.
2. On the home page, under Get started with your site, click Add lists, libraries, and other apps.
3. If the Get started with your site control does not appear on the home page, click the Settings icon, and click View Site Contents, and then on the Site Contents page, click Add an App.
4. Click SharePoint Store.
5. Browse the SharePoint Store for “**SharePoint Page Guide**”.
6. Click the **SharePoint Page Guide** App.
7. Click Details, and then click Buy It.
8. Follow the steps to log in and purchase the App, if required.
9. In the Grant Permission to an App dialog box, if you trust the App, click Allow Access.
10. The **SharePoint Page Guide** App is now added and appears in the Apps section of your Site Contents list.

\*For SharePoint 2013/2016 on premise installations you will be provided with the ‘SharePointPageGuide.app’ file to add to the app catalogue for the SharePoint Page Guide Add-in to be made available within your SharePoint environment.

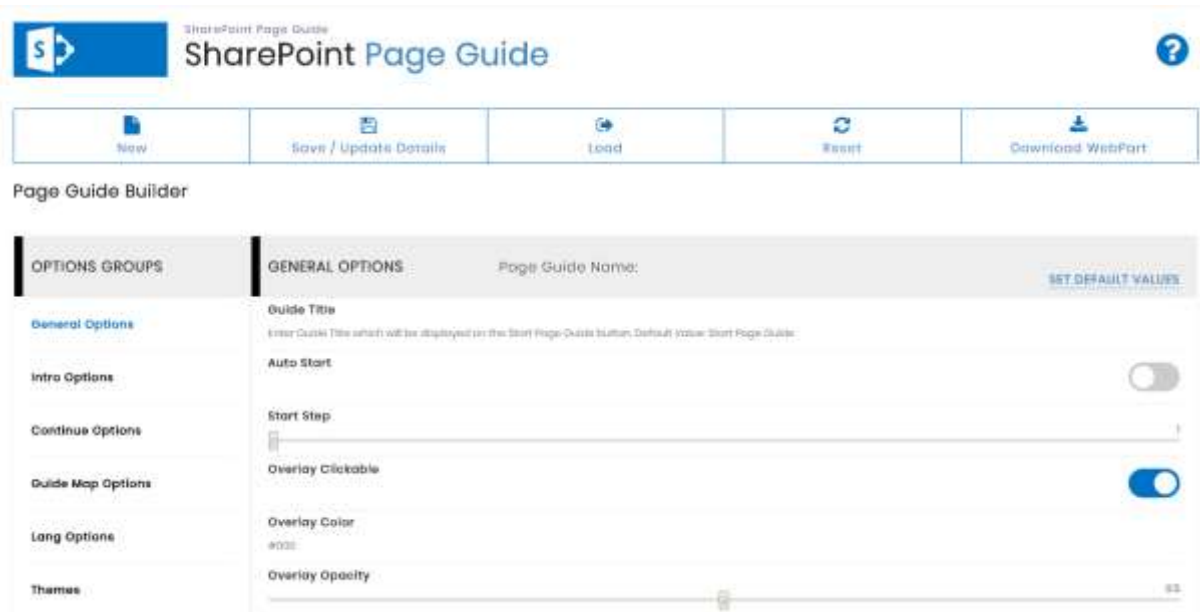
## How to Use SharePoint Page Guide?

Navigate to the page from where you would like to start the SharePoint Page Guide, find the respective elements, which you would like to highlight into the Page Guide and keep them in separate notepad file. Click on Open Page Guide Builder to open Page Guide Builder to build the Page Guide.

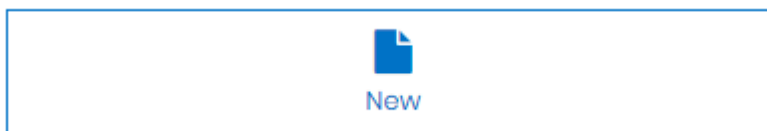
### Create a Page Guide

#### Build a Page Guide with SharePoint Page Guide Builder

1. The Page Guide Builder will allow you to create new a Page Guide and edit/update any existing page guide details.

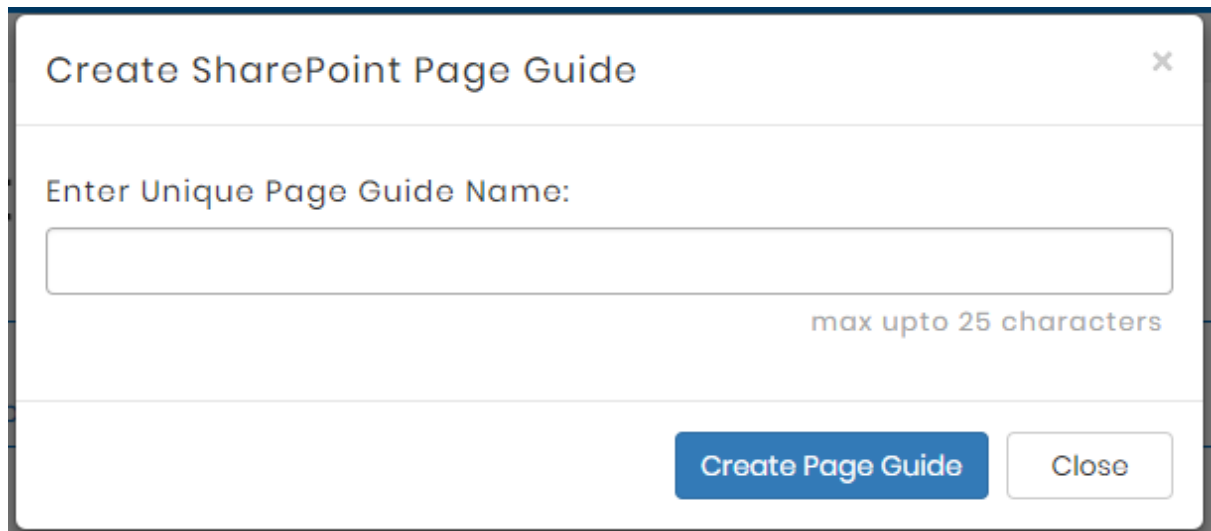


2. Click on New button to create new Page Guide.



3. Enter unique Page Guide Name for the page guide and click on Create Page Guide button. If it's not unique or used for any other page guide then system will display warning message to choose another Page Guide name.





Create SharePoint Page Guide

Enter Unique Page Guide Name:

max upto 25 characters

Create Page Guide Close

4. Each Page Guide will be created by using 7 different configuration options. They are as below:
- a. **General Options:** This is the General Options for the page guide where you can define different general properties for the page guide.
    - i. **Guide Title:** Title of the guide which displayed on the button to start the page guide.
    - ii. **Auto Start:** Enables Page Guide to auto start when user comes to the respective page.
    - iii. **Start Step:** Step from which the page guide begins.
    - iv. **Overlay Clickable:** If set to false, then the Page Guide will not be terminated when user clicks an outside area.
    - v. **Overlay Color:** Default color value of overlay layer. Any color format: '#000', 'rgb(0,0,0)' or 'black'
    - vi. **Overlay Opacity:** Default opacity value of overlay layer.
    - vii. **Pagination:** Shows the total number of steps and the current step number.
    - viii. **Register Missing Elements:** Shows an absent element in Page Guide Map and find this element in DOM. This needs to be set as true in order to render multi Page Guide.
    - ix. **Text Direction:** The direction property specifies the text direction/writing direction.
  - b. **Intro Options:** In this section you can configure the settings related to introductory slide where you can explain all about the intent of the Page Guide.
    - i. **Enable:** If sets to true, before the page guide start user will see the introductory slide, which can be used to explain about the intent of the Page Guide.
    - ii. **Cover/Image Path:** Path to the cover (image) of introduction slide.
    - iii. **Overlay Color:** Color value of overlay layer for intro slide. Any color format: "#000", "rgb(0,0,0)" or "black"
    - iv. **Overlay Opacity:** Opacity value of overlay layer for intro slide.
  - c. **Continue Options:** In this section you can configure the settings related to continuing an unfinished Page Guide.
    - i. **Enable:** This parameter adds the ability to continue the unfinished Page Guide.
    - ii. **Cover/Image Path:** Path to the cover (image) of continue message.
    - iii. **Overlay Color:** Color value of overlay layer for intro slide. Any color format: "#000", "rgb(0,0,0)" or "black"
    - iv. **Overlay Opacity:** Opacity value of overlay layer for continue message.

- d. **Guide Map Options:** In this section you can configure settings related to the Page Guide Map.
- i. **Enable:** This parameter adds the ability to view list of steps with use of guide map.
  - ii. **Position:** Position of the guide map block.
  - iii. **Clickable:** If set to false, then link of steps on the guide map will not be clickable else user can also move any steps from the guide map.
  - iv. **Open:** Specify to show or hide the map of the page guide at the starting of the page guide.
- e. **Lang Options:** In this section, you can define the text of the buttons that will be used in the page guide. If you are using any other than language than English, you can override the button text by specifying value of button text.
- i. **Cancel Title:** The title in the cancel Page Guide button.
  - ii. **Cancel Text:** The text for the cancel Page Guide button.
  - iii. **Hide Text:** The text to hide the Page Guide map button.
  - iv. **Guide Map Text:** The text to open Page Guide map.
  - v. **Guide Map Title:** Title of Page Guide Map.
  - vi. **Next Text Default:** The text in the Next button.
  - vii. **Prev Text Default:** The text in the Prev button.
  - viii. **End Text:** Set the text for the close button in the last step of the page guide.
  - ix. **Continue Dialog Title:** Title of continue dialog.
  - x. **Continue Dialog Content:** Content of continue dialog.
  - xi. **Continue Dialog – Begin Button Text:** Text in the start button of continue dialog.
  - xii. **Continue Dialog – Continue Button Text:** Text in the continue button of continue dialog.
  - xiii. **Intro Title:** Title of introduction dialog.
  - xiv. **Intro Content:** Content of introduction dialog.
  - xv. **Intro Dialog – Start Button Text:** Text in the start button of introduction dialog.
  - xvi. **Intro Dialog – Cancel Button Text:** Text in the cancel button of the introduction dialog.
- f. **Themes:** In this section, you can select the theme that you would like to choose for the Page Guide. There are 6 different themes available for you to choose (each has a preview image).
- g. **Step Options:**
- i. **Target Elements:** Here you specify the object you want to highlight. It may take the values: 'uniqueName', selectors: '.className', '.parent .child', '.item-1, .item-2', or html code of any tag: '<tagName>' without events. You can specify multiple elements separated by comma in order to highlight multiple elements on the page.
  - ii. **Step Title:** Title of step.
  - iii. **Step Content:** Provide description of the step. Specify content in simple text or html format. You can also audio and video in this property by adding html of audio or video tag. You can specify only single either of image, audio or video for each step.  
**Note:** In case, you would like to add You Tube video to the page guide, go to You Tube video and right click on it and select “**Copy embed code**” and paste it to notepad file and copy the value of src attribute and paste it as video URL value.
  - iv. **Cover/Image Path:** Path to the image file. If video or audio tag specified in the step content, image won't be displayed.
  - v. **Location/URL of Page:** The path to the page on which step should work or target element is available. This property is mandatory for the multi-page Page Guides.

- vi. **Position:** Specify the position of modal when the element is highlighted. Supported values and its position are listed as below:
  1. **auto:** Based on available blank space, application itself determines the best place to display modal next to the highlighted element.
  2. **center:** Modal will be displayed into the center of the screen and no element will be highlighted.
  3. **xxx:** First x stands for the position of message relative to a selected item. It may take the values: t (top), r (right), b (bottom), l (left). 2<sup>nd</sup> x stands for the position of corner a relatively selected item. Based on first selected letter, you need to choose 2<sup>nd</sup> letter. If first symbol is "l" or "r" it may take the values: t(top), c (center),b (bottom); b) if first symbol is "t" or "b" it may take the values: l(left), c(center), r(right). 3<sup>rd</sup> x stands for position of the window with a message a relative to corner. Based on first selected letter, you have to choose 3<sup>rd</sup> letter. If it's "l" or "r" it may take the values: t(top), c(center), b(bottom); or if first symbol is "t" or "b" it may take the values: l(left), c(center), r(right);
- vii. **Share of Highlight Element:** Shape of highlighting. 0 – Rectangle, 1 – Circle, 2 – Rounded Rectangle.
- viii. **Shape Border Radius:** The corner radius of rounded rectangle shape. Only when 'Shape of Highlighted Element' has value "2".
- ix. **Overlay Opacity:** Opacity value of overlay layer for particular this step.
- x. **Overlay Color:** Color value of overlay layer for this step. Any color format: "#000", "rgb(0,0,0)" or "black"
- xi. **Duration:** The speed of movement of highlighting. Value should in milliseconds (ms).
- xii. **Timer:** The time after which an automatic switching to the next step. Value should be in milliseconds (ms).
- xiii. **Next Button Text:** The text in the next button.
- xiv. **Prev Button Text:** The text in the prev button.
- xv. **Skip:** Step can be skipped, if you set parameter as true.
- xvi. **Disable:** Cancel access to element.
- xvii. **Spacing:** Indent highlighting around the element. Value should be in pixel (px).
- xviii. **Delay Before:** The delay before the element search. Value should be in milliseconds (ms).
- xix. **Delay After:** The delay before the transition to the next step. Value should be in milliseconds (ms).
- xx. **Event:** An event that you need to do to go to the next step. It may take the values: 'next' (default), 'click', 'mousedown', 'mouseup' and other jQuery events. If you want to listen for the event in another element, then use the array construction. The first array element is an 'event', the second element is a jQuery object: ['eventName', 'yourSelector']
- xxi. **Trigger:** An event (jQuery) which is granted on the selected element. In the transition form step to step. It may take the values: Name of Event or null/blank.

There are some extra options available in Step Options which will be available for each step defined in the Step Details. They are Move Step Down, Move Step Up, Set default values, Delete Step. It's highlighted in below screenshot.

## STEP 1 OPTIONS



SET DEFAULT VALUES

DELETE STEP

**Move Step Down:** This option is used when you want to move the step order downwards.

**Move Step Up:** This option is used when you want to move the step order upwards.

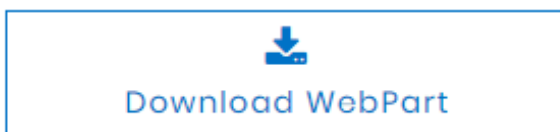
**Set default values:** It will wipe out all the control values and set the values of control with the default value.

**Delete Step:** It will delete the respective step from the guide.

- Once you configure all the required properties of page guide in Page Guide Builder, you must click on Save/Update Guide to add/update Page Guide details for future updates as required.



- Once you save the details of your Page Guide, click on the Download WebPart button to download the SharePoint Page Guide Web Part package. In the downloaded package, you'll get the SharePoint Page Guide Webpart file with the .sppkg extension and deployment and usage instructions to detail how to deploy the SharePoint Page Guide Web Part and use on your SharePoint pages to render the Page Guide.

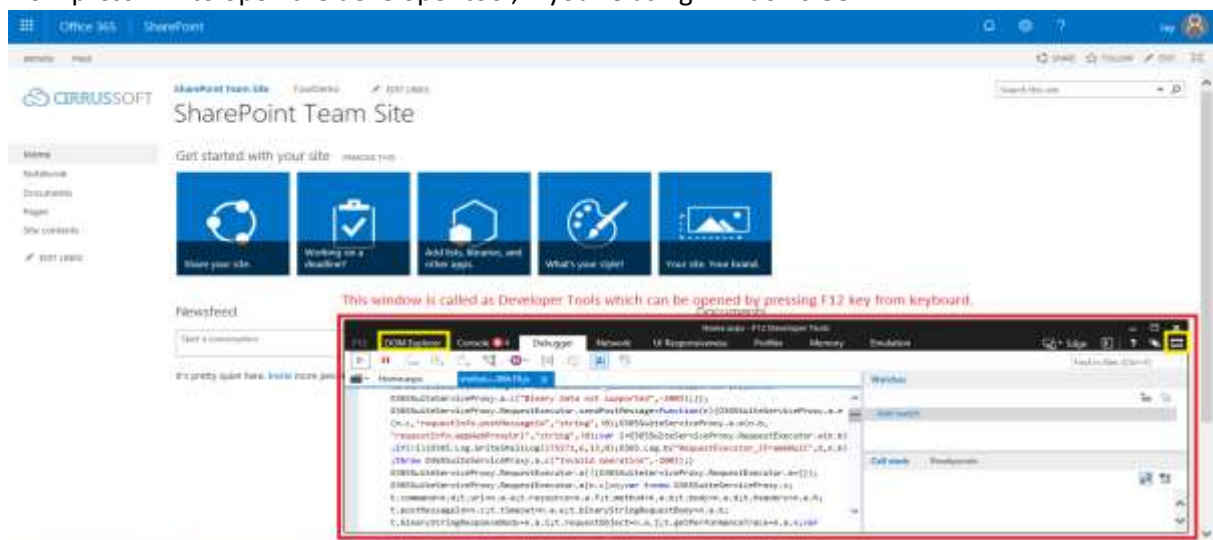


## Select Page Elements for Page Guide

Please follow the following steps to get the element name to highlight into the Page Guide.

**Note:** We recommend you use IE 11 or Edge to find the element from the developer tool.

- Navigate to desired SharePoint Page where you would like to add the Page Guide for users.
- Now press F12 to open the developer tool, if you're using Windows OS.



- i. After opening developer tools, click on **pin icon** (or press CTRL + P) available in top right corner of the developer tools window in above screen. It will pin the developer tools into the browser window.
- ii. After pinning the developer tools into the browser window, click on **DOM Explorer** in the menu bar of Developer Tools available in top left corner and highlighted in above screen.
- iii. Click on **Element selector** and **DOM Element Highlighter** in Dom Explorer window, highlighted in below screenshot with red.

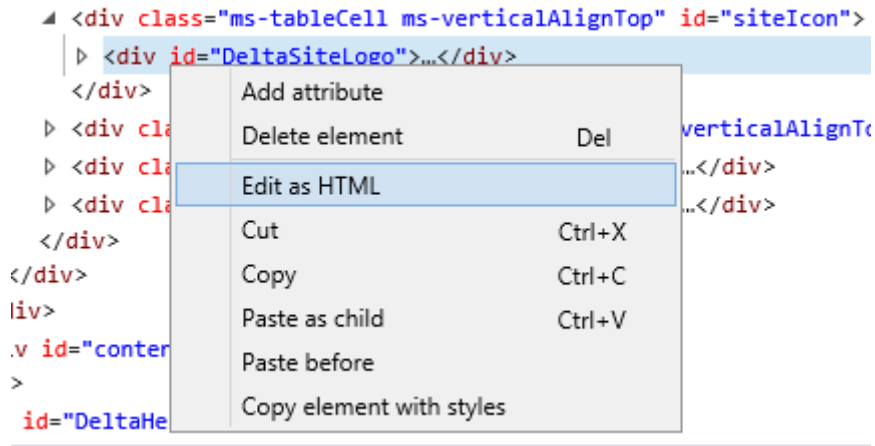


- iv. After selecting the Element selector, click on the element which you would like to include in the Page Guide and highlight for users. When you have selected the element it will show you the boundary of the element to highlight as well.



- v. Once you highlight the desired element which you would like to include into the Page Guide, click on that element, by clicking on the element, it will be selected into the developer tools.
- vi. Now if the highlighted element has an ID attribute then copy it and prepend “#” to it and store it in notepad, it will require at the time of defining steps into Page Guide Builder. If the element does not have the ID attribute, check for the class attribute, please make sure the class name is unique for that element to highlight it. If you choose class attribute then use “.” To prepend to it. If the element has multiple class’s which are separated by white space then add “.” before each element and remove white space between them. If it doesn’t have unique class then just right click on the element and select Edit as HTML.

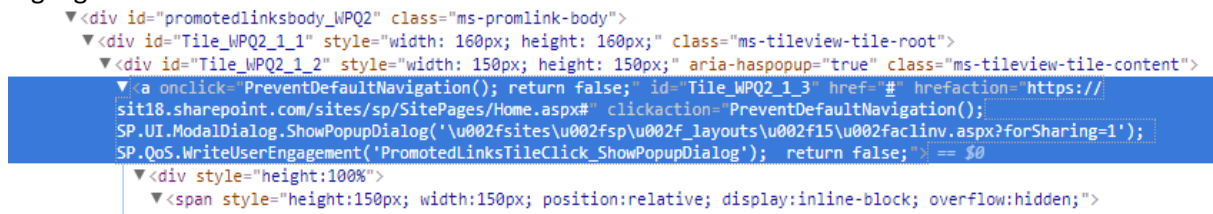
**Note:** SharePoint Page Guide also supports highlighting of multiple elements in single step, if you would like to highlight multiple element in single step then just separate the elements by comma “,” and specify multiple elements in target field of Step Options section in Page Guide Builder.



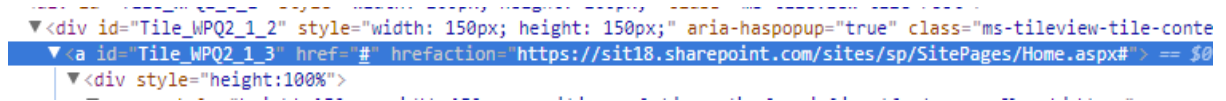
Once you click on Edit as HTML, copy the HTML of first element only from the HTML editor as highlighted in below screen for the div element. Don't copy whole HTML of HTML editor.



If element contains any events such as onblur, onchange, onfocus, onselect, onsubmit, onreset, onkeydown, onkeypress, onkeyup, onmouseover, onmouseout, onmouseup, onmousedown, onmousemove, onclick, ondblclick, onload, onerror, onunload, onresize etc then remove the attribute/s from the element. As an example, if your element HTML are similar to highlighted below screenshot:



Then you have to remove onclick, clickaction attributes from above element and your final element to enter into Step Option will be similar to below screenshot:



we have just removed onclick and clickaction attribute from original element HTML.

- vii. Follow steps [Error! Reference source not found.](#) to [Error! Reference source not found.](#) until you get the all the element details, which you would like to include into the page guide. You can include elements from different page as well, if your element will be from different page, please also keep the page URL with you as well as it requires to enter into the Page Guide Step details.

## Create Steps across Multiple Pages

To create multiple page guide, you must set below set listed properties.



1. **General Option:**
  - ⇒ **Register Missing Elements:** set it as true (on) in case you would like to build page guide across multiple pages.
2. **Steps Options:**
  - ⇒ **Location/URL of Page:** Specify the location (URL) of page from where you picked the element. This must be specified in case you're building page guide for the multiple pages.

### Save a Page Guide

Once you configure all the required properties in Page Guide Builder, you must save or update the Guide details. Once you have saved the Page Guide details, changes to Guide will reflect on the SharePoint Page immediately (if the Page Guide Webpart has referenced the Guide). To save/update the Page Guide details which you entered in the Page Guide Builder, click on Save/Update Details button available on the top, it will save/update existing Guide details.



If you build the Page Guide for the first time, you have to download the SharePoint Page Guide Web Part from the [SharePoint Page Guide site](#) to render the page guide on the SharePoint Pages. This web part needs to deploy on your SharePoint tenant once in order to render the page guide on the SharePoint Pages. You can also download the Web Part by clicking Download Web Part button available on the top.



### Insert / Render Page Guide into SharePoint Pages

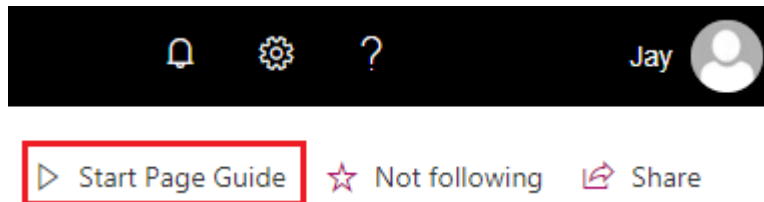
Use the SharePoint Page Guide Web Part to insert / render a SharePoint Page Guide into the relevant SharePoint Pages (download SharePoint Page Guide webpart from [here](#)). In the downloaded package you will get ".sppkg" file with deployment and usage instruction guide to deploy the Web part in your SharePoint environment and use it for SharePoint Classic & Modern Pages.

### How to Start a Page Guide

1. **Using Start Page Guide button:** When you add the SharePoint Page Guide Web Part to SharePoint Page and configure it to the relevant Page Guide, the Start Page Guide button will appear on the SharePoint Page.
  - a. **SharePoint Classic Page:** In a SharePoint Classic Page, Start Page Guide button will be added to the top right corner, before of the Share, Follow and Edit button and below to the logged in user icon.



- b. **SharePoint Modern Page:** In SharePoint Modern Page, the Start Page Guide button will be added to the top right corner before of the Not Following/Not Following and Share button and below of the logged in user icon.



2. **Using Custom Link:** You can also start the Page Guide by clicking on a user defined custom link (anchor tag). You must specify the link URL (href attribute of anchor tag) as [http://\[pageguidename\].guide](http://[pageguidename].guide). Pageguidename is the same text which you have selected into SharePoint Page Guide Web Part or mentioned at the time of creation of page guide, **all letters must be in lower case!** Once you have added the link on the page, and when user clicks on that link, the Page Guide will be started (this is the same as when a user clicks on Start Page Guide button).

**Note:** Custom link only works if you have added SharePoint Page Guide Web Part and configure the respective Page Guide on the page and have specified the same Page Guide name in the link.

## Update an Existing Page Guide

### Load and Update an Existing Page Guide

1. To update any existing Page Guide, you can go to the Page Guide Builder from the SharePoint Page Guide App and click on Load button.



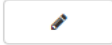





2. When you click on Load button, it will open a popup with all the existing Page Guide details, click on Edit button to open Page Guide in edit mode or click on Delete button to permanently remove that Page Guide.



Page Guide Details ✕

Click on Edit button to load Page Guide details in edit mode:

Guide Name	Modified	Modified By	Edit	Delete
t1	5/22/2018, 8:16:11 PM	Jay		
tour1	5/22/2018, 6:38:50 PM	Jay		
tour2	5/22/2018, 6:54:57 PM	Jay		

Cancel

- Once you open a Page Guide in edit mode and have made the required changes, click on the Save/Update Details button to save the update. If you have already inserted the SharePoint Page Guide Web Part into the appropriate page it will automatically get the update and your changes will reflect immediately!

## SharePoint Page Guide Support

Thank you for choosing **SharePoint Page Guide**.

If you require any further assistance please visit our online Support Centre or Contact Us.

<http://cirrussoft.support>

<https://sharepointpageguide.com>