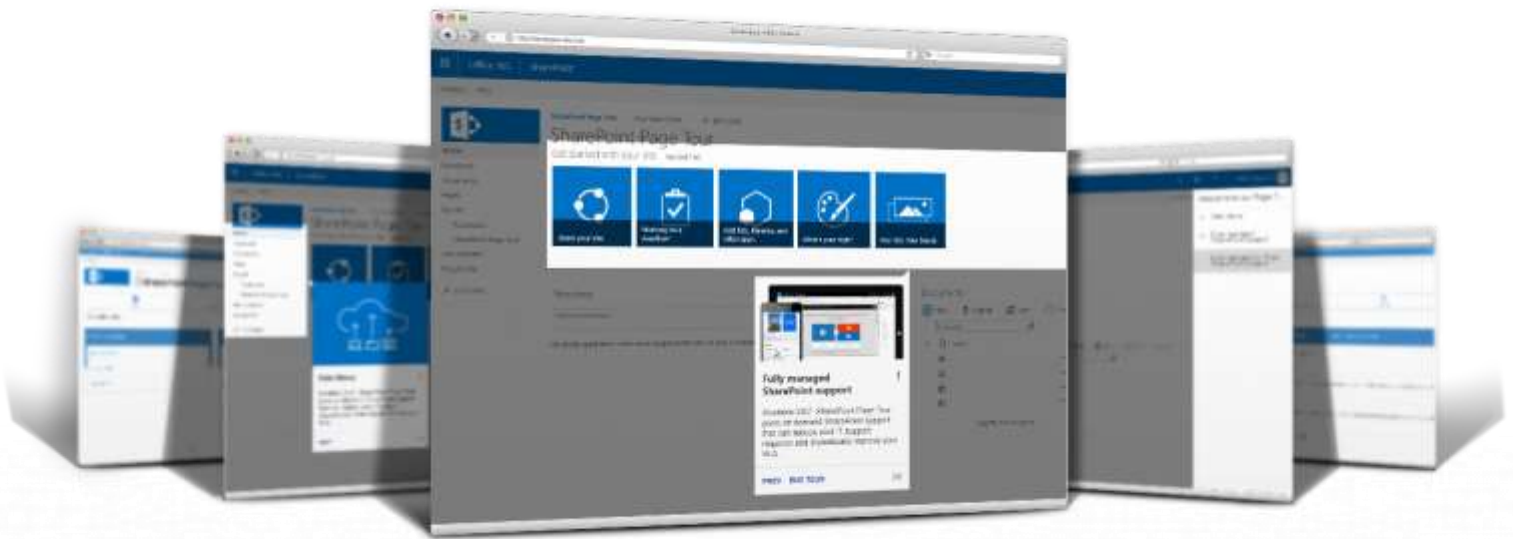


SharePoint Page Tour



Installation and Configuration Manual





IMPORTANT YOU MUST READ AND AGREE TO THE TERMS AND CONDITIONS OF THE LICENSE BEFORE CONTINUING WITH THIS PROGRAM INSTALL.

CIRRUS SOFT LTD End-User License Agreement ("EULA") is a legal agreement between you (either an individual or a single entity) and CIRRUS SOFT LTD. For the CIRRUS SOFT LTD software product(s) identified above which may include associated software components, media, printed materials, and "online" or electronic documentation ("SOFTWARE PRODUCT"). By installing, copying, or otherwise using the SOFTWARE PRODUCT, you agree to be bound by the terms of this EULA. This license agreement represents the entire agreement concerning the program between you and CIRRUS SOFT LTD, (referred to as "licenser"), and it supersedes any prior proposal, representation, or understanding between the parties. If you do not agree to the terms of this EULA, do not install or use the SOFTWARE PRODUCT.

The SOFTWARE PRODUCT is protected by copyright laws and international copyright treaties, as well as other intellectual property laws and treaties. The SOFTWARE PRODUCT is licensed, not sold.

Version History

Change Record

Date	Author	Version	Change reference
2018, May	SharePoint Page Tour	1.0.0.0	Initial Release for SharePoint Online.

Current Version for SharePoint Online

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



Table of Contents

Introduction.....	1
SharePoint Page Tour Benefits and Features	2
SharePoint Page Tour Installation	3
Types of License.....	3
Installing SharePoint Page Tour.....	3
How to Use SharePoint Page Tour?	4
Create a Page Tour	4
Build a Page Tour with SharePoint Tour Builder	4
Select Page Elements for Tour.....	7
Create Steps across Multiple Pages.....	9
Save a Page Tour	10
Render Tour over SharePoint Pages.....	10
How User can Start the Tour	10
Update an Existing Page Tour.....	11
Load and Update and Existing Page Tour	11
SharePoint Page Tour Support.....	13

Introduction

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

SharePoint Page Tour is extremely powerful and precise. The add-in includes a Tour 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 these step-by-step walkthroughs 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 Tour can be used for many use cases (e.g. change management, onboarding, training, support) and will add benefit to any SharePoint application.

How does SharePoint Page Tour Work?

After you have installed **SharePoint Page Tour**, you will be able to use the Tour Builder to create a Page Tour by selecting the unique page elements that you would like to highlight and add contextual help (photos 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 Tour you save and generate the code to insert into your SharePoint Page via the Content Editor web part or Page Tour SPFX web part for the new page experience. Each Page Tour is saved within SharePoint and can be opened to edit as required. Edited Page Tours will automatically reflect changes without the need to re-insert code.

SharePoint Page Tour Uses:

Do you use SharePoint to display important information and allow process functionality for your organisation? With SharePoint Page Tour 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 Tour Benefits and Features

- Helps SharePoint users learn and understand the platform and applications built on top SharePoint interactively, with live contextual help.
- Build SharePoint Page Tours for any SharePoint Page and Elements with “NO CODE”.
- Step between Multiple Pages.
- Ability to continue the unfinished tour.
- Create intro slide in centre of screen.
- Display tour covers
- Text, Video or Audio Content
- Works with dynamic content
- Localization
- Search elements. Supports most CSS3 selectors, as well as some non-standard selectors.
- Supports browsers IE 9+, Firefox, Chrome, Safari
- Detailed documentation and tour about the tour
- 37 Positions’ Variants
- Auto Positioning of Message
- Map of all Tour Steps
- Control of Buttons Text
- Scroll to Element
- Highlighting of passed steps
- Material design
- Responsive

SharePoint Page Tour Installation

Types of License

SharePoint Page Tour 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 Tour

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 Tour**".
6. Click the **SharePoint Page Tour** 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 Tour** 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 'pagetour.app' file to add to the app catalogue for the SharePoint Page Tour Add-in to be made available within your SharePoint environment.

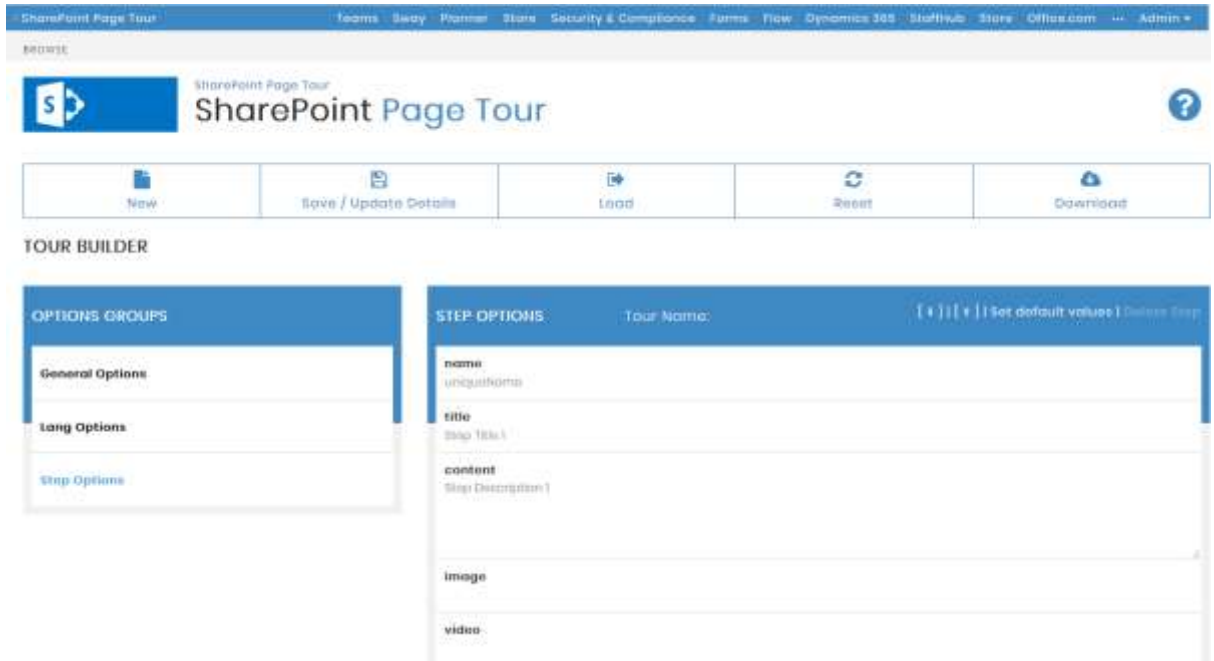
How to Use SharePoint Page Tour?

Navigate to the page from where you would like to start the SharePoint Page Tour, find the respective elements, which you would like to highlight into the Tour and keep them in separate notepad file. Open the SharePoint Page Tour Builder from the App landing page.

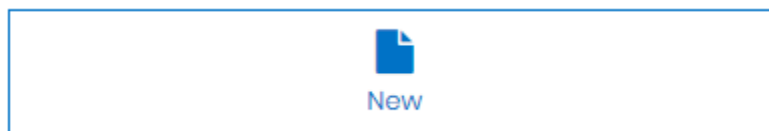
Create a Page Tour

Build a Page Tour with SharePoint Tour Builder

1. The Tour Builder will allow you to create new a tour and edit/update any existing Tour details.



2. Click on New button to create new Tour.



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

Create SharePoint Page Tour
×

Enter Unique Tour Name:

max upto 25 characters

Create Tour
Close

4. Each tour will be categorized in 3 different configuration options. They are as below:
 - a. **General Options:** This is the General Options for the tour where you can define different general properties for the tour.
 - i. **tourTitle:** Specify the title of the tour.
 - ii. **autoStart:** If this set to true, tour will auto start when user comes on the page.
 - iii. **startStep:** Specify the number of step from which tour will begin.
 - iv. **introShow:** If this set to true, before tour user will see the introductory slide.
 - v. **introCover:** Specify the image URL which you would like to display into the Introductory slide. If you don't want to display any image then specify the value as false.
 - vi. **tourMapVisible:** Specify to show or hide the map of tour at the starting of the tour.
 - vii. **tourMapEnable:** Set it as on if you would like to enable the tour map. If you disabled it, tour map won't be accessible for user anymore.
 - viii. **tourMapPos:** Specify the position of tour map. Default value is right.
 - ix. **tourMapJump:** Set it as true to allow user to jump on desired step from tour map. If set to false, then link of steps in Tour Map will be disabled.
 - x. **cssClass:** Specify the custom css class which will be wrap around the tour to change the default tour style.
 - xi. **spacing:** Specify the integer value to add some padding around the highlighted element.
 - xii. **overlayClickable:** This parameter enables or disables the click event for the overlaying layer in the tour.
 - xiii. **modalCancelVisible:** Shows cancel button into the modal.
 - xiv. **stepNumberVisible:** Set it on if you would like to display tour step number and total number of step into the tour.
 - xv. **showAbsentElement:** Set it on if you would like to show absent/missing element on the current page. Otherwise absent element will be auto skipped in the tour. This property must be set as on in case you would like to enable tour for multiple page.
 - xvi. **tourContinue:** This parameter add ability for user to continue the tour if it was not finished earlier.
 - xvii. **textDirection:** The textDirection property specify the text of the tour title and content. Default value is ltr (Left to Right).
 - b. **Lang Options:** This panel is used to set the property of common components of the tour.
 - i. **cancelText:** Specify the text for Cancel Tour button.
 - ii. **hideText:** Specify the text to be displayed in Hide Map button in Tour Map to hide tour map panel.
 - iii. **tourMapText:** The text into the Show Tour Map button. Specified text will be displayed in vertical manner.
 - iv. **tourMapTitle:** Title of tour map.
 - v. **nextTextDefault:** Specify the text for the next button.
 - vi. **prevTextDefault:** Specify the text for the previous button
 - vii. **endText:** Specify the text for the close button in the last step of the tour.
 - viii. **contDialogTitle:** Title of Continue Dialog. This will be appeared when user exit from the tour in between and again start the tour. It will prompt user to continue the tour from he left or start from beginning.

- ix. **contDialogContent**: Content of Continue dialog. This will be appeared when user exits in between the tour and again start the tour. It will prompt user to continue the tour from he left.
 - x. **contDialogBtnBegin**: Text for the button in continue dialog to start tour from beginning.
 - xi. **contDialogBtnContinue**: Text for the button in continue dialog to start tour from last he left.
 - xii. **introTitle**: Title of introductory slide.
 - xiii. **introContent**: Content for the introductory slide.
 - xiv. **introDialogBtnStart**: Text for the start tour button in introductory slide.
 - xv. **introDialogBtnCancel**: Text for the cancel tour button in introductory slide.
- c. **Step Options**: This is the panel where you can define all the elements needs to be included into the tour. You must define name, title and content for each step to highlight it into the tour. So, if you would like to highlight 5 elements into the tour then you must include 5 step details in this panel. There are couple of properties which you can define for each step, they are listed as below:
- i. **name**: Specify the element name which you would like to highlight. How to get element name is explained in step 0
 - ii. **title**: Specify the title of the element which is highlighted.
 - iii. **content**: Specify the content of the modal to explain the details about highlighted element.
 - iv. **image**: Specify the image file URL which you would like to display while element is highlighted.
Note: You can mention either of image, video or audio for each step added to the Tour.
 - v. **video**: Specify the video file URL which you would like to display while element is highlighted. Tour can able to display either of image, video or audio into the Tour. To play the video, browser must be compatible to play video into iFrame.
In case, you would like to add You Tube video to the tour, 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.
Note: You can mention either of image, video or audio for each step added to the tour.
 - vi. **audio**: Specify the audio file URL which you would like to display while element is highlighted.
Note: You can mention either of the image, video or audio for each step added to the tour.
 - vii. **contentPosition**: 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). 2nd x stands for the position of corner a relatively selected item. Based on first selected letter, you need to choose 2nd 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). 3rd x stands for position of the window with a message a relative to corner. Based on first selected letter, you have to choose 3rd 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);

- viii. **skip**: Set it as on to skip the step into the tour.
- ix. **disable**: set it as on to block the access to element.
- x. **overlayOpacity**: Specify the opacity value for overlay layer.
- xi. **nextText**: Specify the text for Next button. Default value is "Next".
- xii. **prevText**: Specify the text for Previous button. Default value is "Prev".
- xiii. **loc**: Specify the location (URL) of page where you take the element. This must be specified in case tour having element name from different pages. Also, showAbsentElement (**showAbsentElement**) must set as on into General option.
- xiv. **delayBefore**: Specify the delay before the element is highlighted.
- xv. **delayAfter**: Specify the delay after the element is highlighted.

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 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.

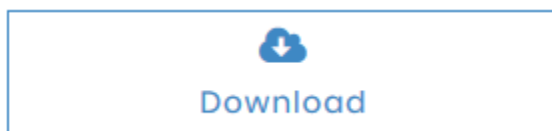
Set default values: It will wipe out all the control values and set the values of control with the default value.

Delete Step: It will delete the respective step from the tour.

5. Once you configure all the required properties of tour in Tour Builder, you have to click on Save/Update Details to add/update Tour Details in the Add-in..



6. Once you save the details of Tour, click on Download button to download, SharePoint Page Tour web part. Once you download the web part, you will get zip file having .sppkg file and instruction guide to deploy and usage of the web part, follow it to render the page tour on SharePoint pages.

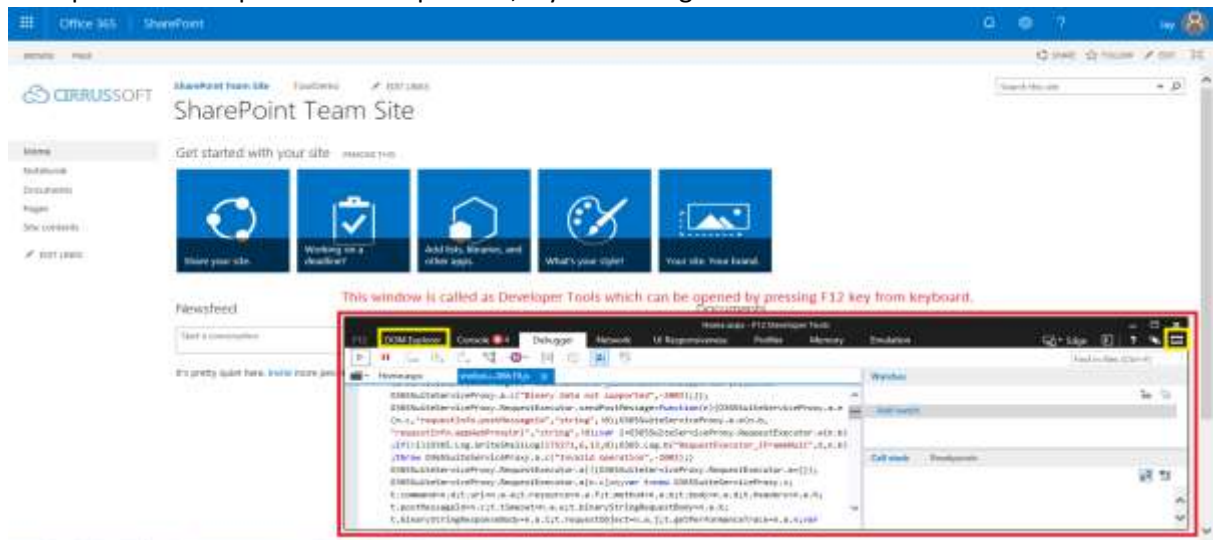


Select Page Elements for Tour

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

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 tour for user.
- Now press F12 to open the developer tool, if you're using Windows OS.



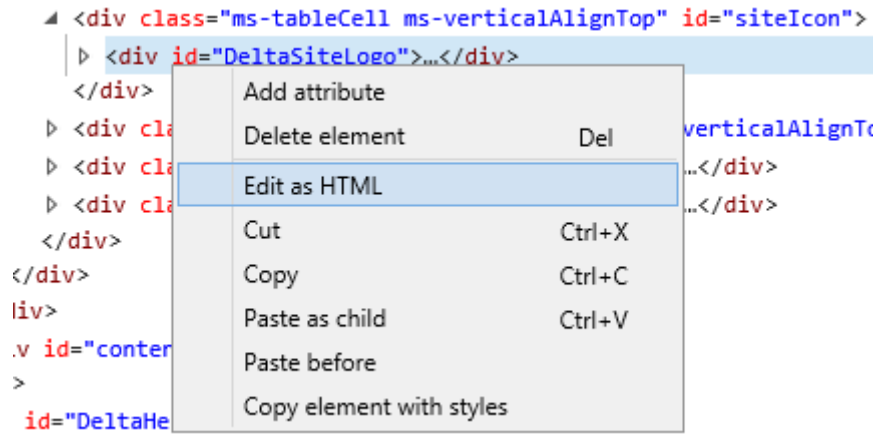
- After opening developer tools, click on **pin icon** (or press CTRL + P) available in top right corner of the developer tools window in above screen. It will pin the developer tools into the browser window.
- After pinning the developer tools into the browser window, click on **DOM Explorer** in the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



- After selecting the Element selector, click on the element which you would like to include into the tour and highlight it while user using the tour. When you have selecting the element and moving on the page it will shows you the boundary of the element and highlight it as well.



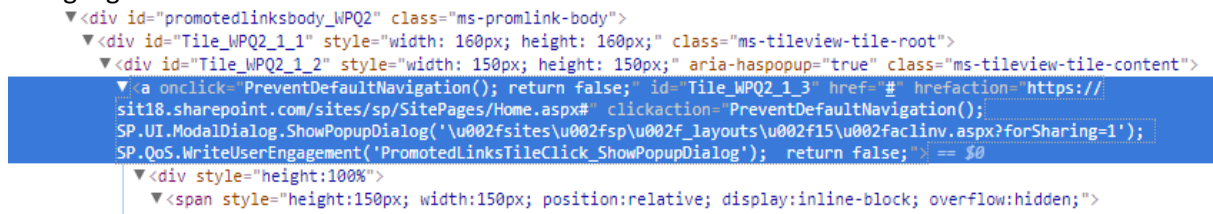
- Once you highlight the desired element which you would like to include into the tour, kindly click on that element, by clicking on the element, it will be selected into the developer tools.
- Now if the highlighted element having any ID attribute then copy it and prepend "#" to it and store it in notepad, it will require at the time of creating Tour Steps. If the element doesn't have the ID attribute then just right click on the element and select Edit as HTML.



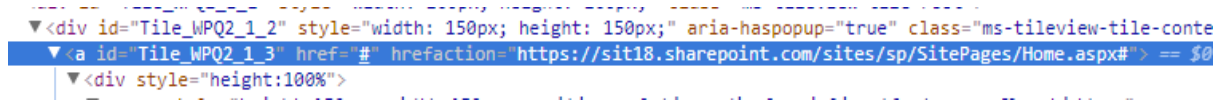
Once you click on Edit as HTML, copy the HTML of first element only from the HTML editor as highlighted in below screen for the div element. Don't copy whole HTML of HTML editor.



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 kindly remove that attribute 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 tour. 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 Tour Step details.

Create Steps across Multiple Pages

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

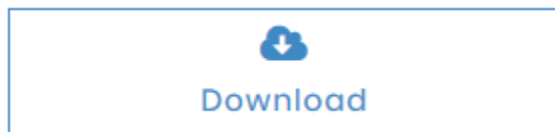
1. **General Option:**
 - ⇒ **showAbsentElement:** set it as on in case of tour across multiple pages.
2. **Steps Options:**
 - ⇒ **loc:** Specify the location (URL) of page where you take the element. This must be specified in case tour having element name from different pages.

Save a Page Tour

Once you configure all the required properties in Tour Builder, you must save or update the tour details, in order to see the update in tour over SharePoint page. To save the page tour details which you entered in the Tour Builder, click on Save/Update Details button available on the top, it will save the tour details in the backend.



Once you save or update the tour details, kindly click on Download button to download the SharePoint Page Tour web part to render tour on SharePoint pages. When you download the package of SharePoint Page Tour Web Part, you will get .sppkg file of webpart which you have to deploy in app catalog and web part installation and usage manual.

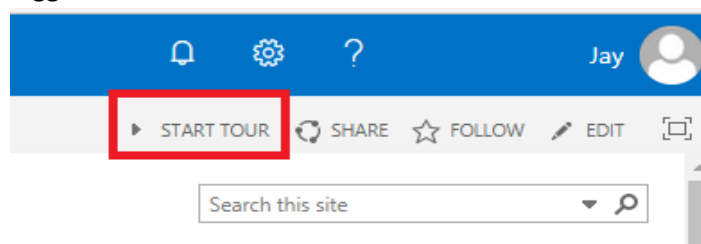


Render Tour over SharePoint Pages

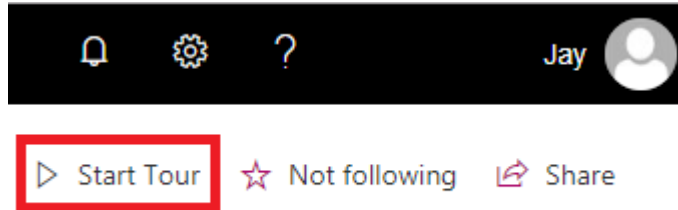
In order to render SharePoint Page Tour over SharePoint Pages, you have to download SharePoint Page Tour webpart from [here](#). In the downloaded package, you will get “.sppkg” file and deployment and usage of SharePoint Page Tour Web Part. In the deployment and usage instruction guide, we have added instruction to deploy the web part to the SharePoint App Catalog site and how to add web part within your SharePoint site and use it with SharePoint Classic and Modern Pages.

How User can Start the Tour

1. **Using Start Tour button:** When you add SharePoint Page Tour Web Part to SharePoint Page and configure it with the tour needs to be render on the page, it will add Start Tour button to the SharePoint Page.
 - a. **SharePoint Classic Page:** In SharePoint Classic Page, Start Tour 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, Start Tour 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:** We have also provision to start the tour by clicking on user define custom link (anchor tag). You must specify the link URL (href attribute of anchor tag) as [http://\[tourid\].tour](http://[tourid].tour) tour id will the same as you have selected the tour in the SharePoint Page Tour Web Part, all letter must be in lower case. Once you added the link on the page, and when user click on that link, tour will be started as similar to when user click on Start Tour button.

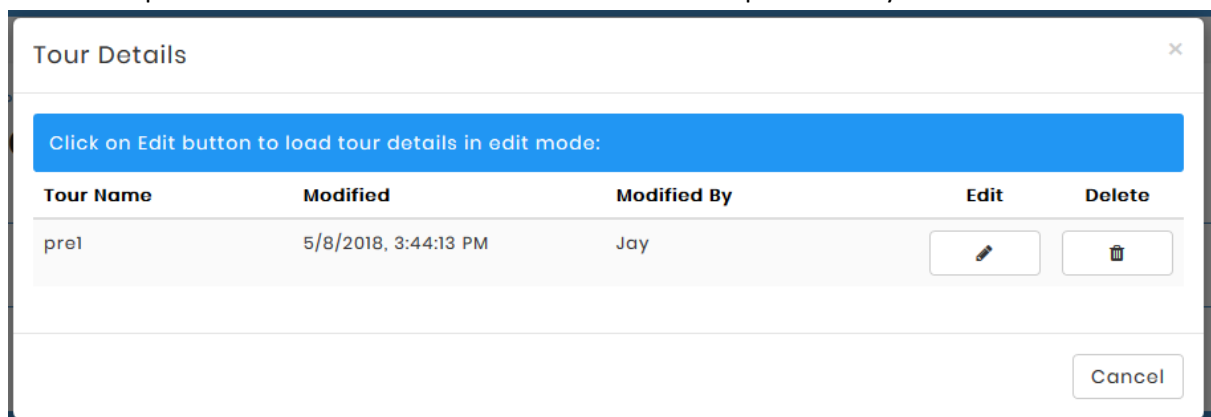
Update an Existing Page Tour

Load and Update and Existing Page Tour

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



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



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

4. Sometimes it may happen that changes won't reflect after updating the tour in that case, kindly do hard refresh (CTRL + F5) or clear your browser cache files in order to see updated tour details.

SharePoint Page Tour Support

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

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

<http://cirrussoft.support>

<https://sharepointpagetour.com>