



SHAREPOINT COMPASS

By Total Solutions Incorporated

System User Guide

Version 1.0.0.0



Total Solutions

Table of Contents

I. Overview	3
II. Prerequisites	4
SharePoint Online	4
Create App Catalog	4
Enable User Custom Scripts	4
SharePoint 2013, 2016, or 2019	4
Create App Catalog	4
III. Installation	5
A. Downloading the Software Package	5
Add to App Catalog	5
Create Compass Site Collection	7
B. Registration	8
IV. Initial Configuration	11
A. Adding your first Site Collection(s)	11
B. Creating Navigational Structure.....	17
C. Stylistic Configuration Settings	20
V. Advanced Features	23
A. Custom Styling	23
VI. Pricing & Payment	25
VII. Upgrading	27
VIII. FAQ	29

SHAREPOINT COMPASS BY TOTAL SOLUTIONS

I. OVERVIEW

SharePoint Compass by Total Solutions is a global navigation tool that allows you to quickly and easily enhance the navigation experience of your SharePoint environment. With a simple installation and configuration process, you can have your new navigation ready in minutes, not hours.

SharePoint Compass by Total Solutions is a license-based, downloadable software package to be installed on SharePoint as a web part on your intranet. It can be installed on-premises from SharePoint 2013 forward, online, or on hybrid environments, in the classic or modern SharePoint user interface, and remains consistent across all of the above-stated platforms.

Users with Page Design permissions will be allowed to install and configure SharePoint Compass by Total Solutions to add and remove links, change text colors, background colors, add icons, etc. You can also choose whether the navigation menu pushes other content down or sit on top of the page content.

Advanced features available in some license types allow users to use custom CSS to configure the solution above and beyond the inherent configuration options. Additional features allow for users to choose to alter the navigation on some sites while leaving the inherited global navigation intact, allowing for a more personalized look-and-feel for groups or units.

II. PREREQUISITES

Follow the instructions below for your version of SharePoint:

SharePoint Online

Note that the “Enable User Custom Scripts” step can take up to 24 hours to take effect.

Create App Catalog

Refer to the following TechNet article for instructions:

<https://social.technet.microsoft.com/wiki/contents/articles/36933.create-app-catalog-in-sharepoint-online.aspx>

Enable User Custom Scripts

Refer to the following TechNet article for instructions:

<https://social.technet.microsoft.com/wiki/contents/articles/37533.sharepoint-online-how-to-enable-custom-script.aspx>

SharePoint 2013, 2016, or 2019

Create App Catalog

Refer to the following TechNet article for instructions:

<https://docs.microsoft.com/en-us/sharepoint/administration/install-and-manage-apps-for-sharepoint-server>

III. INSTALLATION

This section will outline how to download and install SharePoint Compass by Total Solutions onto your SharePoint environment.

A. Downloading the Software Package

To begin the installation process, you can navigate to www.totalsol.com/products/ and click the Download button.



FIGURE 1

A pop-up will ask if you allow the software to download. Click 'save file.'

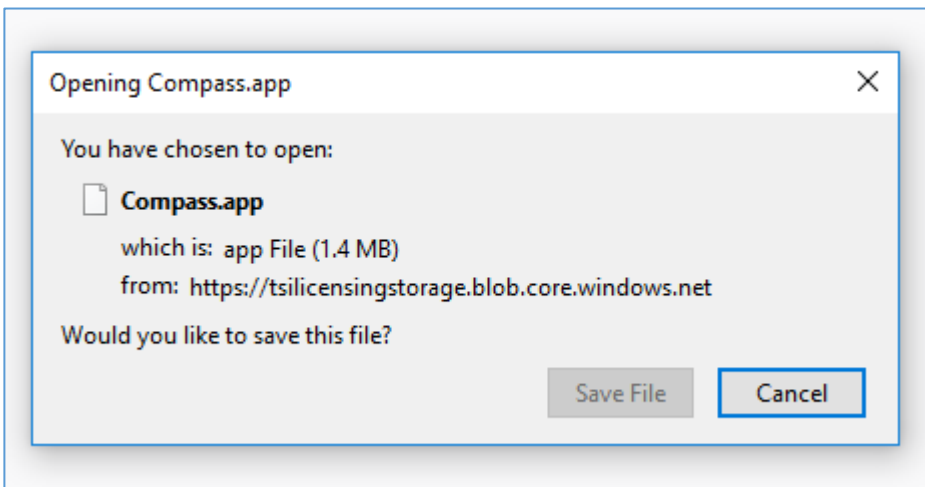


FIGURE 2

Add to App Catalog

Once the software package has downloaded, visit the SharePoint App Catalog. From the App Catalog page, click "Apps for SharePoint" on the left menu.

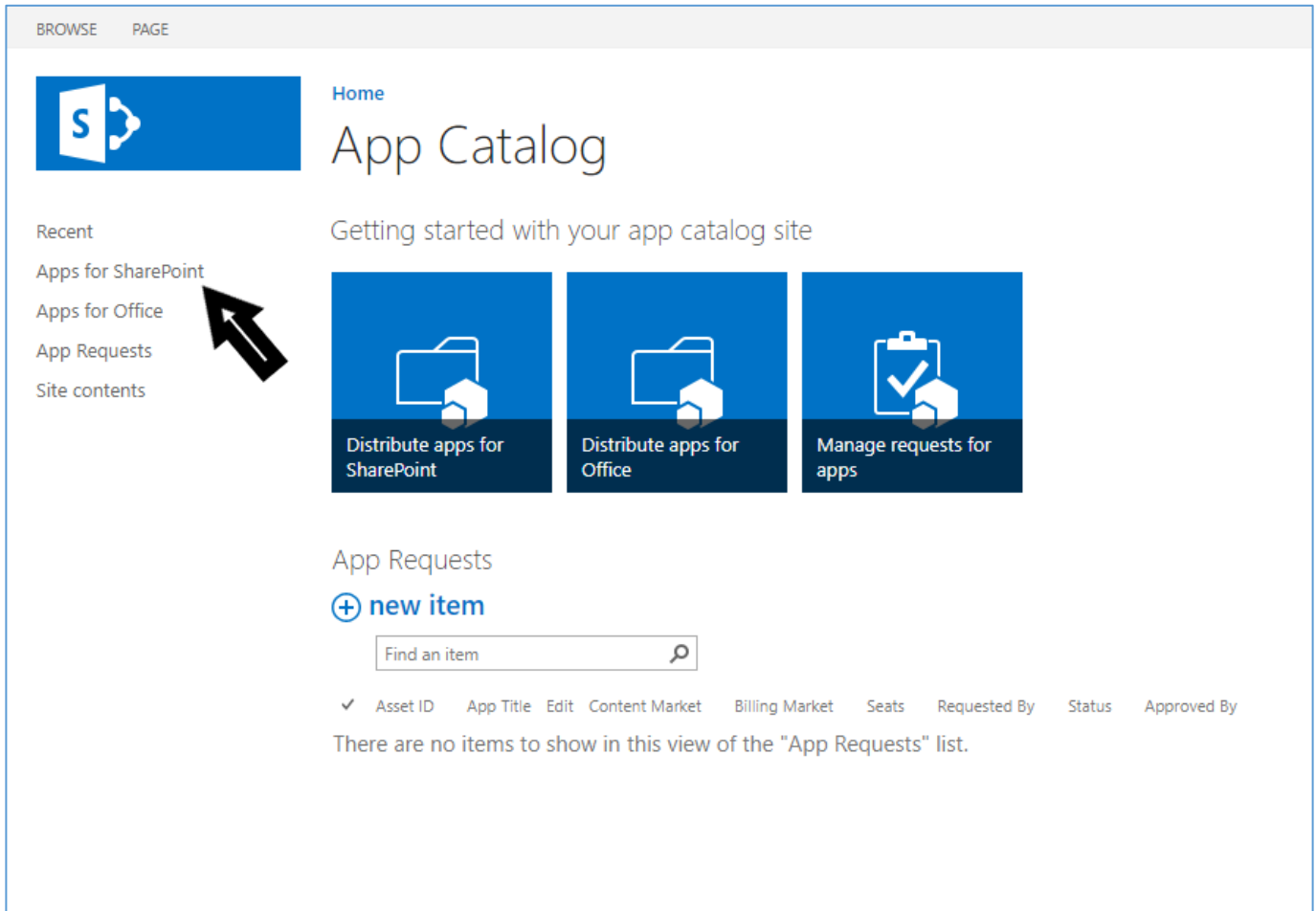


FIGURE 3

At the top of the “Apps for SharePoint” page, click Upload and select the Compass.app package previously downloaded.

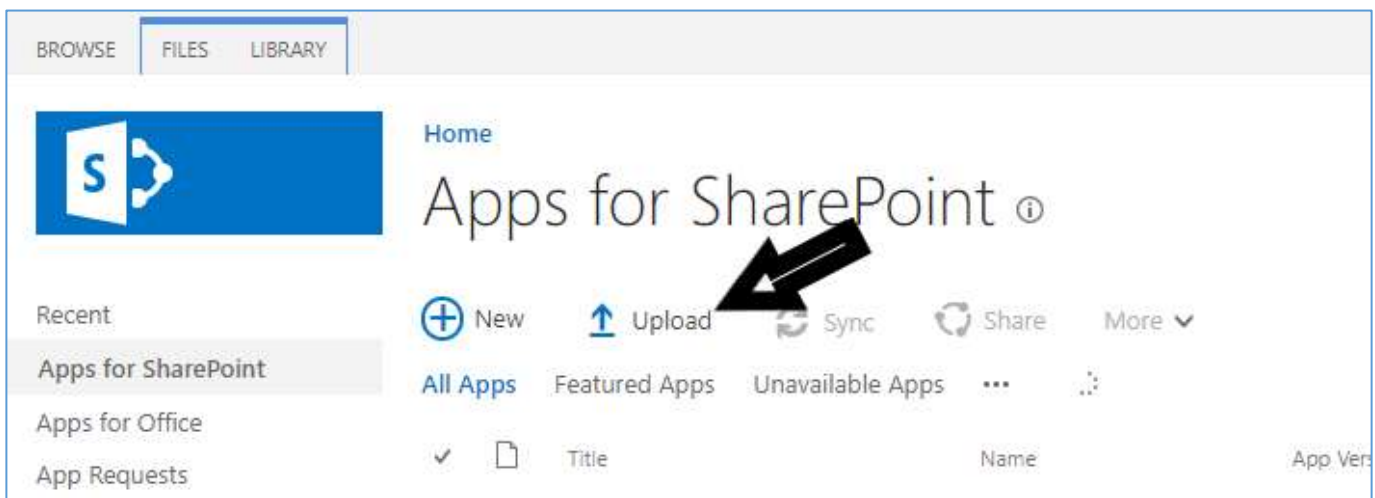


FIGURE 4

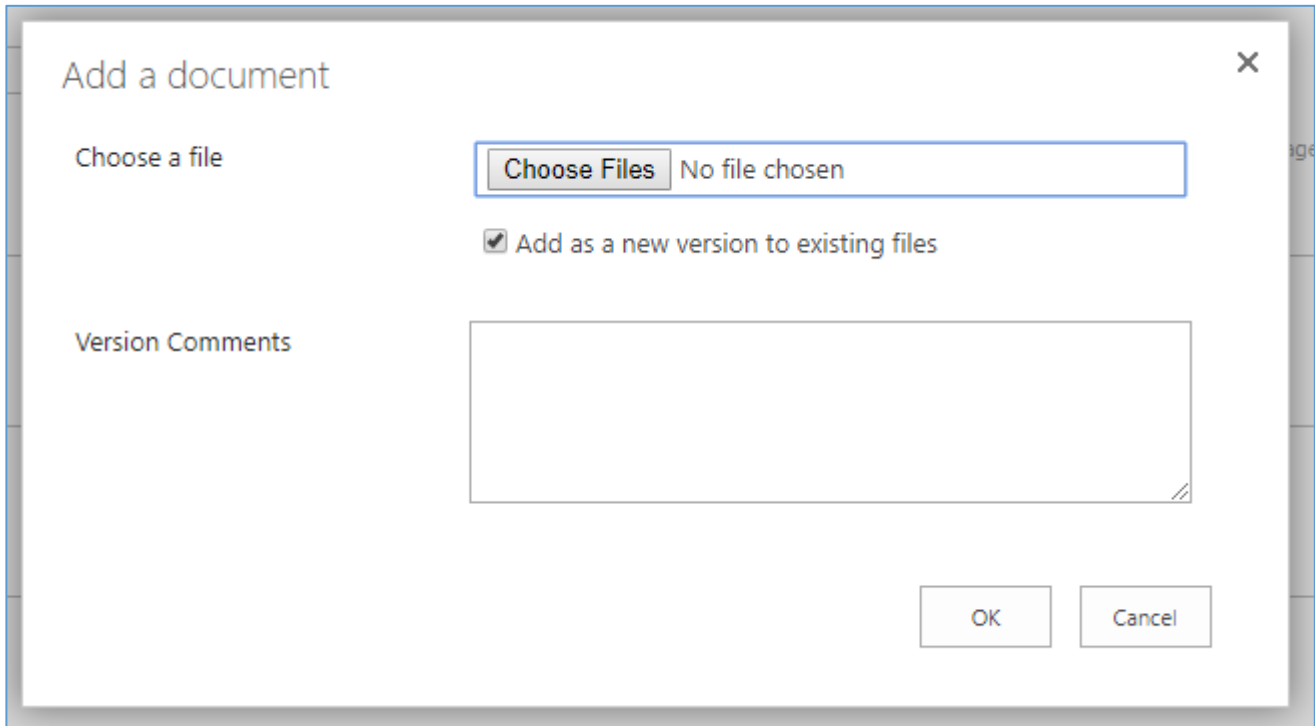


FIGURE 5

Create Compass Site Collection

Create a new Team (classic mode) Site Collection to provision the Compass configuration data to. After SharePoint completes creating your site collection, visit it. Ensure all of the users have read access to the site collection. Click on "Site Contents." Click on New. Click on Compass. Click on 'Trust It' as shown below.

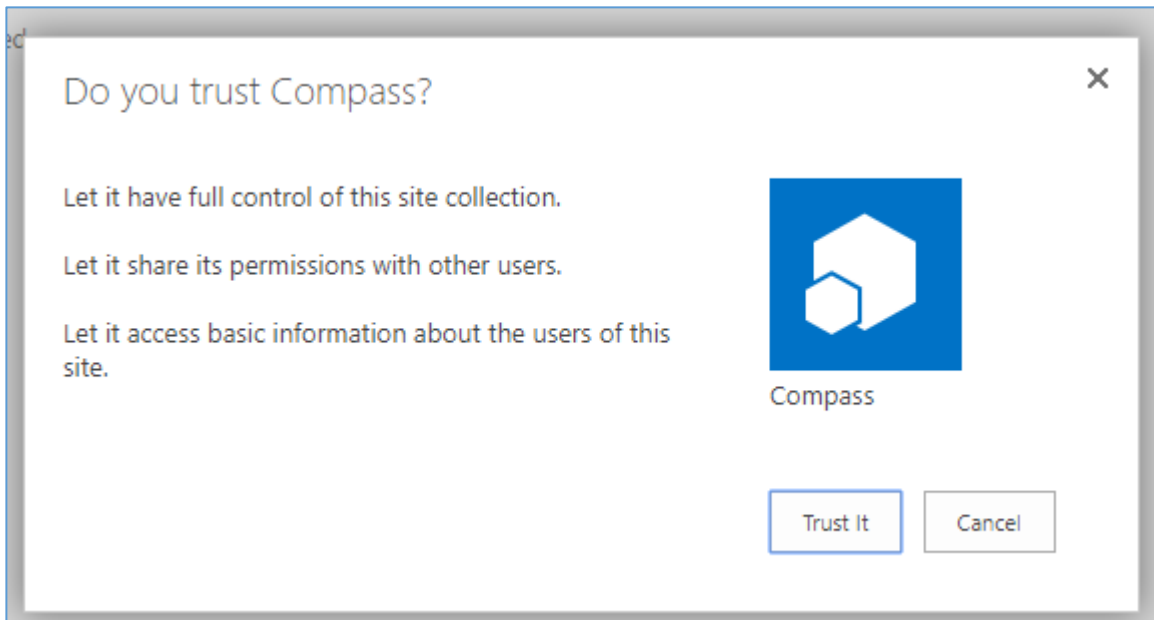


FIGURE 6

Wait for the App to provision. *Note: you may have to refresh the page to see when it is completed.*

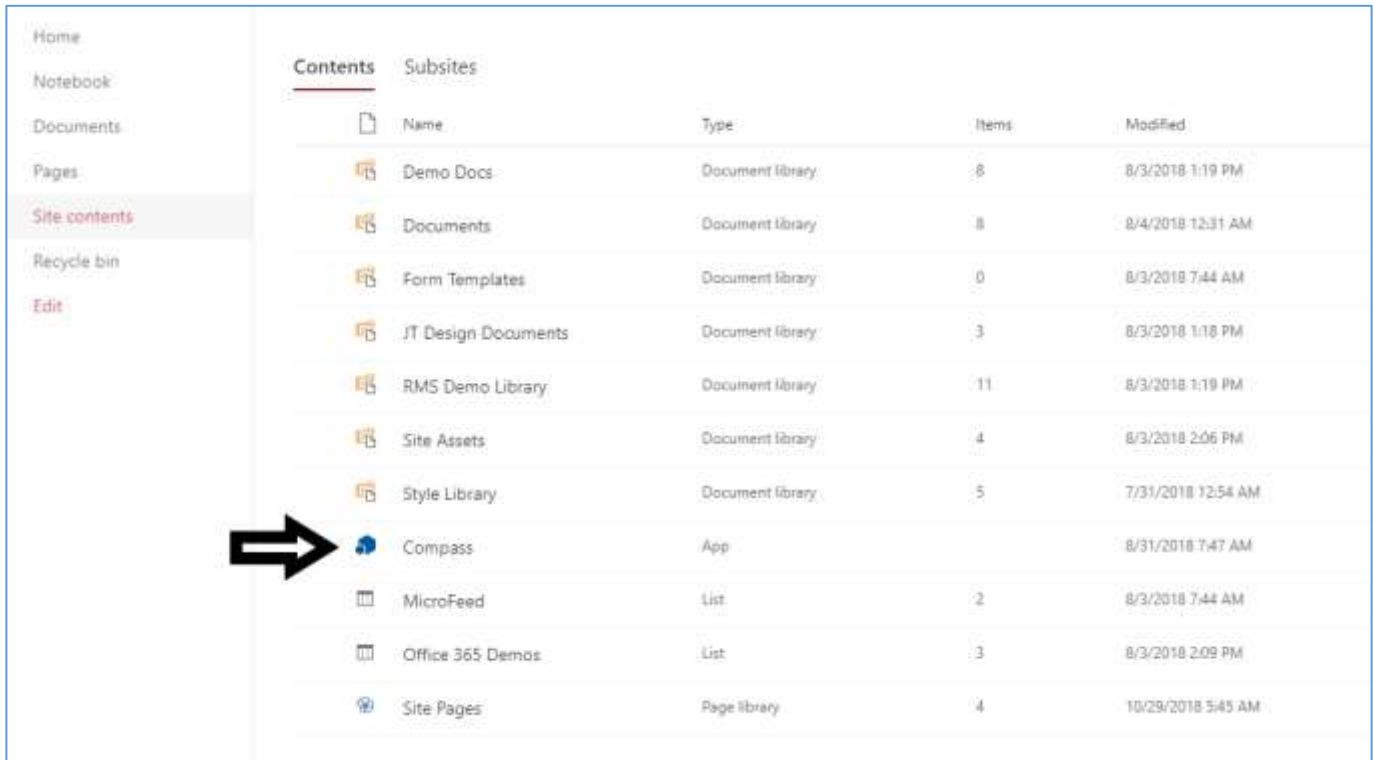


FIGURE 7

Click on the app in the Site Contents, and you'll be taken to the first-time install page, where you will have to agree to the SharePoint Compass End User License Agreement. Click 'I Agree' at the bottom of the page to continue, as shown in the image below.

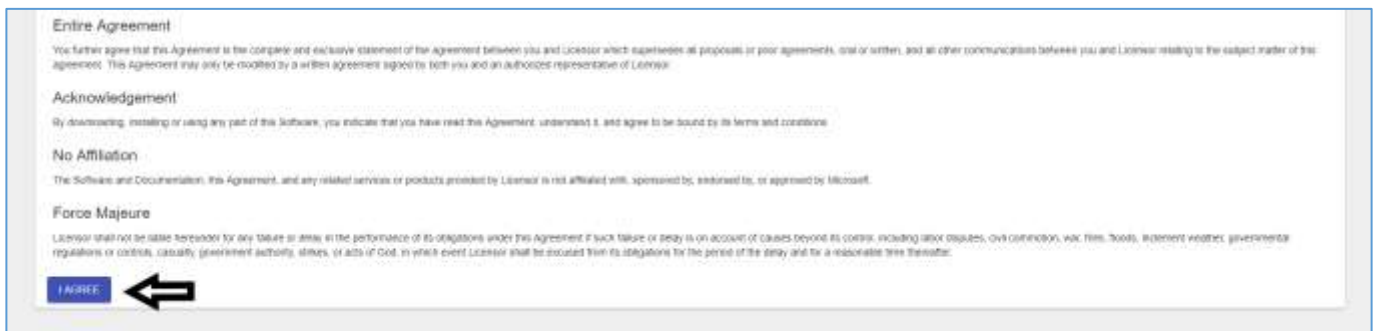


FIGURE 8

B. Registration

When you first log-in, if you do not already have a license key, you will need to register with Total Solutions. Enter your information into the interface shown below:

Register HAVE A KEY? [LOGIN](#)

Name *

Email *

Password *

Must be 8 or more characters

Confirm Password *

Company *

Phone *

REGISTER

FIGURE 9

You will then have to select which plan you would like to purchase and enter your information into the credit card payment window.

Choose Plan

Enterprise	Medium Business	Small Business
<p>All your Navigation needs</p> <p>Features</p> <ul style="list-style-type: none"> Unlimited Site Collections Customizable per site collection Custom Style using CSS CSS affects SharePoint every site collection Compass must be enabled on site collection. No warranty is given in the event Microsoft breaks custom CSS rules. 	<p>All your navigation needs</p> <p>Features</p> <ul style="list-style-type: none"> Up to 150 Site Collections Custom Style using CSS 	<p>All your navigation needs</p> <p>Features</p> <ul style="list-style-type: none"> Up to 50 Site Collections
<p>\$1,000 PER MONTH \$10,000 PER YEAR</p>	<p>\$400 PER MONTH \$5,000 PER YEAR</p>	<p>\$100 PER MONTH \$1,000 PER YEAR</p>

FIGURE 10

If you already have a license key when you reach the registration box, you may click ‘Got a key?’ and enter it in the provided fields:

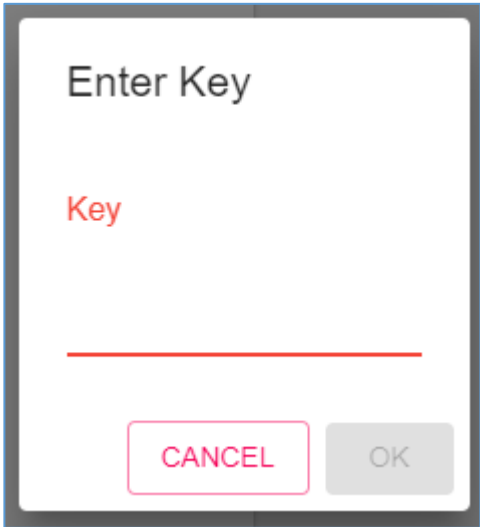


FIGURE 11

Now, all that is left is to add SharePoint Compass by Total Solutions to your first site collection and start the configuration process.

IV. INITIAL CONFIGURATION

The below procedure will guide you through the process to initially configure SharePoint Compass by Total Solutions and set-up your navigation before rolling it out to your Intranet users.

A. Adding your first Site Collection(s)

Adding SharePoint Compass to a site collection is as easy as selecting it using the checkboxes in the middle pane of the 'Site Collections' configuration page and clicking 'Install Selected' at the bottom of the pane, as shown below:

Add to Site Collection











<input type="checkbox"/>	Search Site Collections	Status
<input type="checkbox"/>	https://totalsol.sharepoint.com	✓
<input type="checkbox"/>	https://totalsol.sharepoint.com/portals/hub	✗
<input type="checkbox"/>	https://totalsol.sharepoint.com/portals/personal/afitzpatrick	✗
<input type="checkbox"/>	https://totalsol.sharepoint.com/portals/personal/bwalraven	✗
<input type="checkbox"/>	https://totalsol.sharepoint.com/portals/personal/rmcphoe	✗
<input type="checkbox"/>	https://totalsol.sharepoint.com/portals/personal/rquasney	✗
<input type="checkbox"/>	https://totalsol.sharepoint.com/portals/personal/thutchinson	✗
<input type="checkbox"/>	https://totalsol.sharepoint.com/portals/RM-Test-Channel	✗
<input type="checkbox"/>	https://totalsol.sharepoint.com/portals/RQ-Test-Channel	✗
<input type="checkbox"/>	https://totalsol.sharepoint.com/sites/AgileRefreshCommittee	✗

Rows per page: 10 ▾ 1-10 of 19 < >

FIGURE 12

You can click on the chain icon next to the site collections to open that link and verify that it is where you would like to install the navigation.

Add to Site Collection

<input type="checkbox"/>	Search Site Collections	Status
<input type="checkbox"/>	https://totalsol.sharepoint.com 	✓
<input type="checkbox"/>	https://totalsol.sharepoint.com/portals/hub 	✗
<input type="checkbox"/>	https://totalsol.sharepoint.com/portals/personal/afitzpatrick 	✗
<input type="checkbox"/>	https://totalsol.sharepoint.com/portals/personal/bwalraven 	✗
<input type="checkbox"/>	https://totalsol.sharepoint.com/portals/personal/rmcphoe 	✗
<input type="checkbox"/>	https://totalsol.sharepoint.com/portals/personal/rquasney 	✗
<input type="checkbox"/>	https://totalsol.sharepoint.com/portals/personal/thutchinson 	✗
<input type="checkbox"/>	https://totalsol.sharepoint.com/portals/RM-Test-Channel 	✗
<input type="checkbox"/>	https://totalsol.sharepoint.com/portals/RQ-Test-Channel 	✗
<input type="checkbox"/>	https://totalsol.sharepoint.com/sites/AgileRefreshCommittee 	✗

Rows per page: 10 ▾ 1-10 of 19 < >

UNINSTALL SELECTED **INSTALL SELECTED**

FIGURE 13
 On the right-hand side of that pane a status indicator will tell you if SharePoint Compass has been installed on that site collection previously. If is actively installed, a checkmark icon will so indicate, with an x indicating that it is not installed.

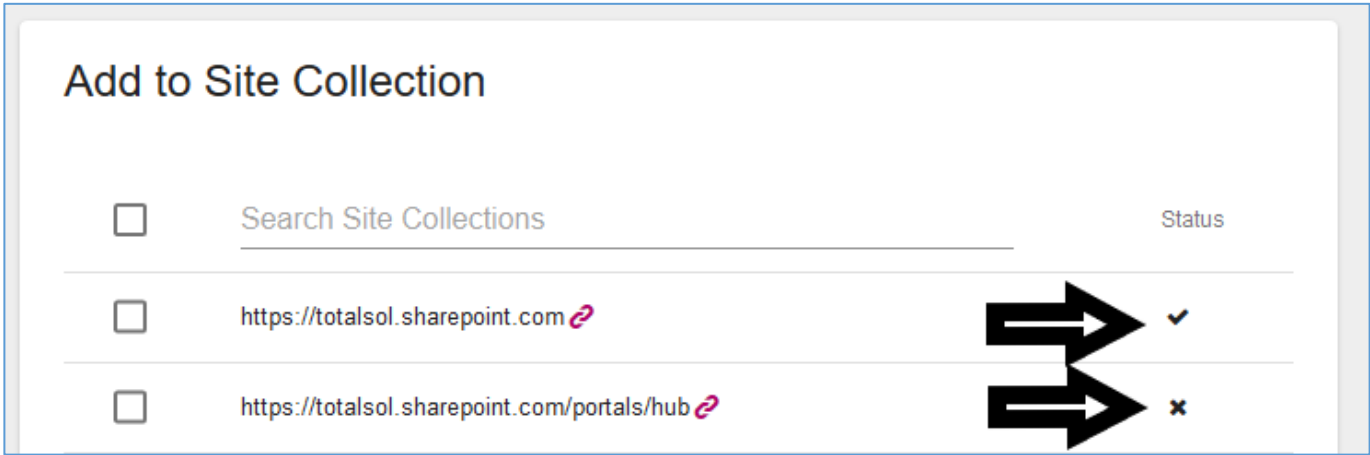


FIGURE 14

Remember that there may be more than one-page worth of site collections, which you can access by paging at the bottom of the site collection pane

Add to Site Collection

<input type="checkbox"/>	Search Site Collections	Status
<input type="checkbox"/>	https://totalsol.sharepoint.com	✓
<input type="checkbox"/>	https://totalsol.sharepoint.com/portals/hub	✗
<input type="checkbox"/>	https://totalsol.sharepoint.com/portals/personal/afitzpatrick	✗
<input type="checkbox"/>	https://totalsol.sharepoint.com/portals/personal/bwalraven	✗
<input type="checkbox"/>	https://totalsol.sharepoint.com/portals/personal/rmcphoe	✗
<input type="checkbox"/>	https://totalsol.sharepoint.com/portals/personal/rquasney	✗
<input type="checkbox"/>	https://totalsol.sharepoint.com/portals/personal/thutchinson	✗
<input type="checkbox"/>	https://totalsol.sharepoint.com/portals/RM-Test-Channel	✗
<input type="checkbox"/>	https://totalsol.sharepoint.com/portals/RQ-Test-Channel	✗
<input type="checkbox"/>	https://totalsol.sharepoint.com/sites/AgileRefreshCommittee	✗

Rows per page: 10 ▾ 1-10 of 19 < >




FIGURE 15
 At any time, you can uninstall SharePoint Compass from a site collection by checking the box and clicking 'Uninstall Selected' at the bottom of the pane.

Add to Site Collection

<input type="checkbox"/>	Search Site Collections	Status
<input type="checkbox"/>	https://totalsol.sharepoint.com	✓
<input type="checkbox"/>	https://totalsol.sharepoint.com/portals/hub	✗
<input type="checkbox"/>	https://totalsol.sharepoint.com/portals/personal/afitzpatrick	✗
<input type="checkbox"/>	https://totalsol.sharepoint.com/portals/personal/bwalraven	✗
<input type="checkbox"/>	https://totalsol.sharepoint.com/portals/personal/rmcphoe	✗
<input type="checkbox"/>	https://totalsol.sharepoint.com/portals/personal/rquasney	✗
<input type="checkbox"/>	https://totalsol.sharepoint.com/portals/personal/thutchinson	✗
<input type="checkbox"/>	https://totalsol.sharepoint.com/portals/RM-Test-Channel	✗
<input type="checkbox"/>	https://totalsol.sharepoint.com/portals/RQ-Test-Channel	✗
<input type="checkbox"/>	https://totalsol.sharepoint.com/sites/AgileRefreshCommittee	✗

Rows per page: 10 1-10 of 19

UNINSTALL SELECTED **INSTALL SELECTED**

FIGURE 16

If you don't see a site collection that you would like to install SharePoint Compass on, you can enter the site collection into the manual installation box in the upper right corner of the 'Site Collections' configuration page.

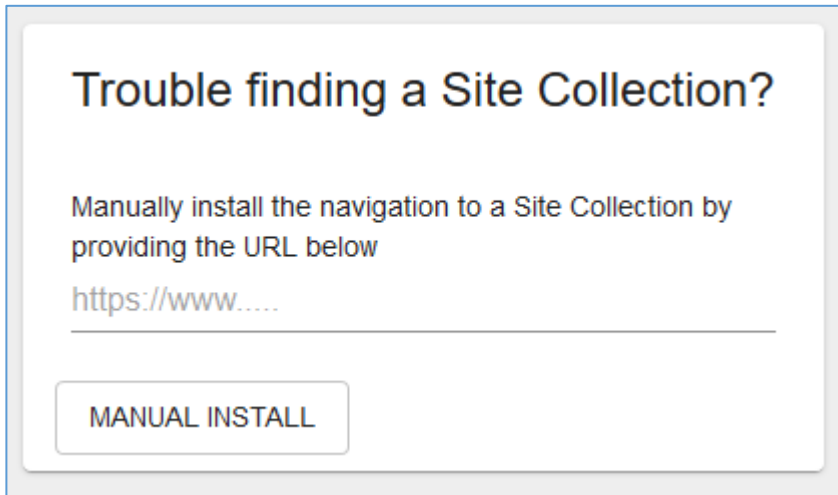


FIGURE 17

Note: you must include the 'http://www.' In order for the manual installation to work appropriately (or https://www.)

B. Creating Navigational Structure

You are now ready to start creating your navigation. You'll first click on the navigation bar to add your top level's first navigation option. Enter the text into the box.

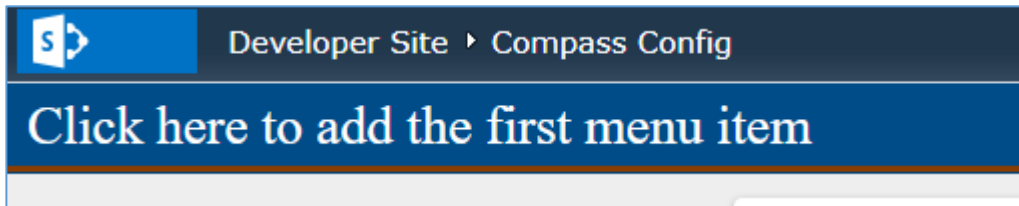


FIGURE 18

You can choose to add an icon to this navigation item by clicking the 'Choose Icon' button.

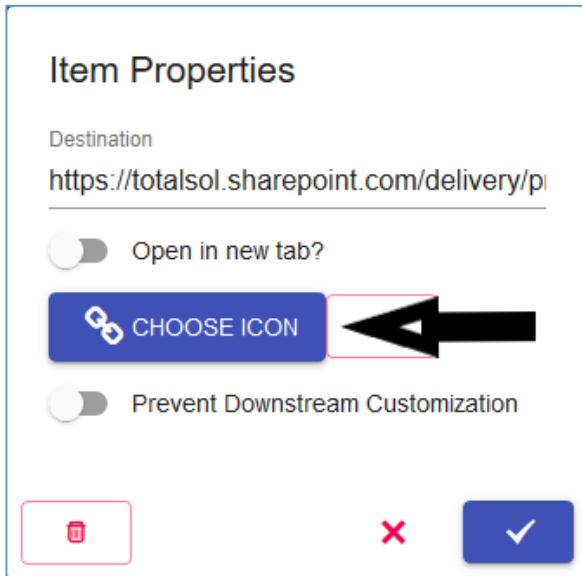


FIGURE 19

You can use one of the preset icons, or you can choose to upload a custom image by clicking 'Image Upload' at the bottom of the pane and uploading your image from your computer.

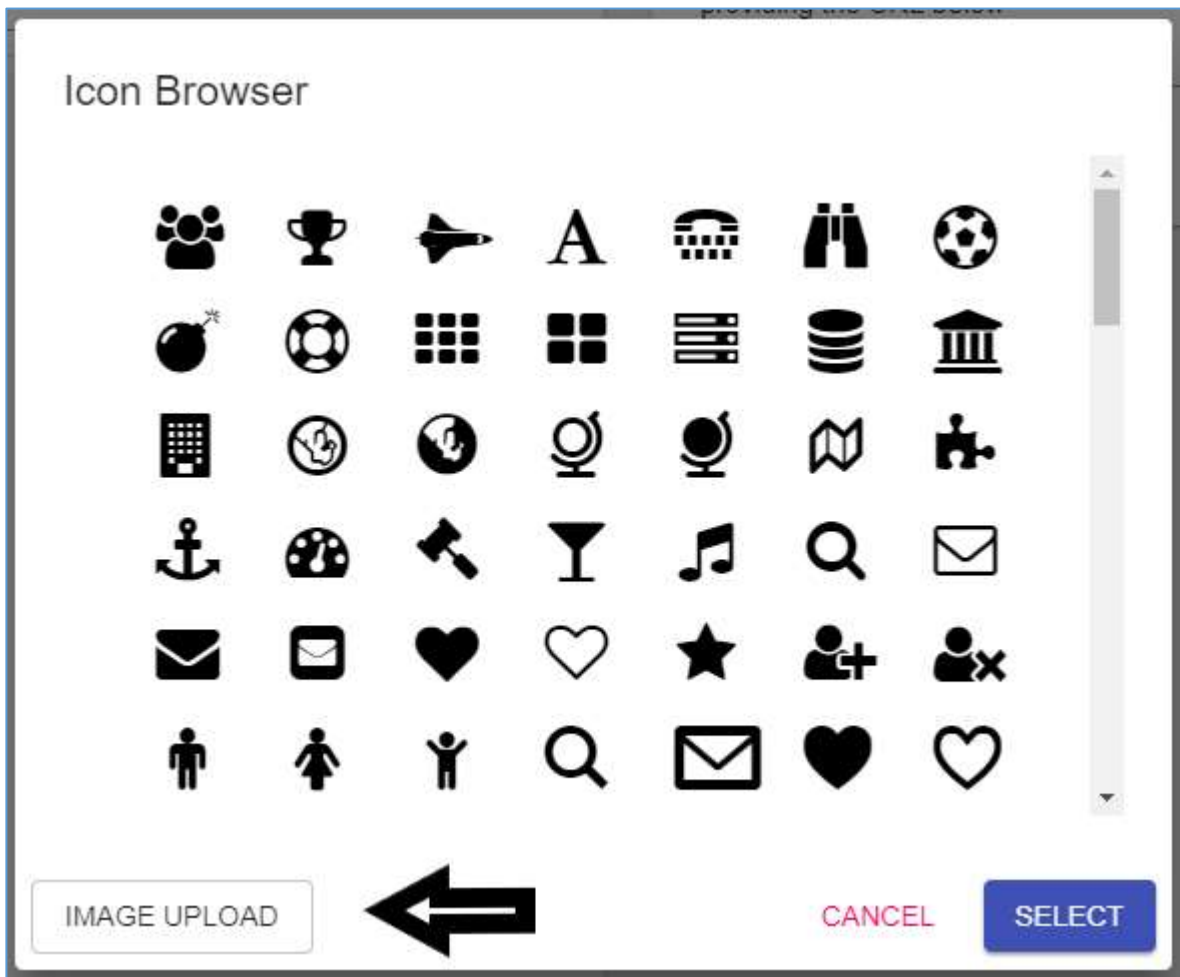


FIGURE 20

You can also select whether or not the link opens in a new tab by checking the corresponding box.

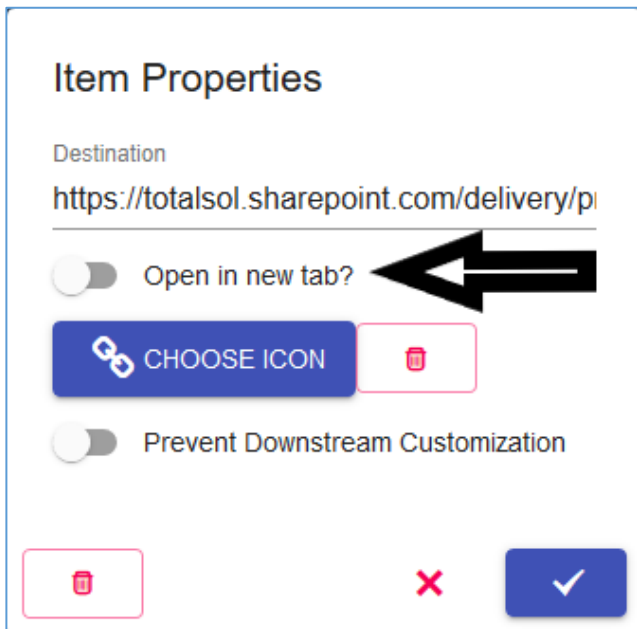


FIGURE 21

Once you're happy with the first navigation level, you can click on the top-level items to begin to add children links. You can add a link below or to the right of the current items by clicking on the '+' icon in the corresponding location.



FIGURE 22

If you need to move links later, don't worry, you can easily drag and drop an item from one place to another.

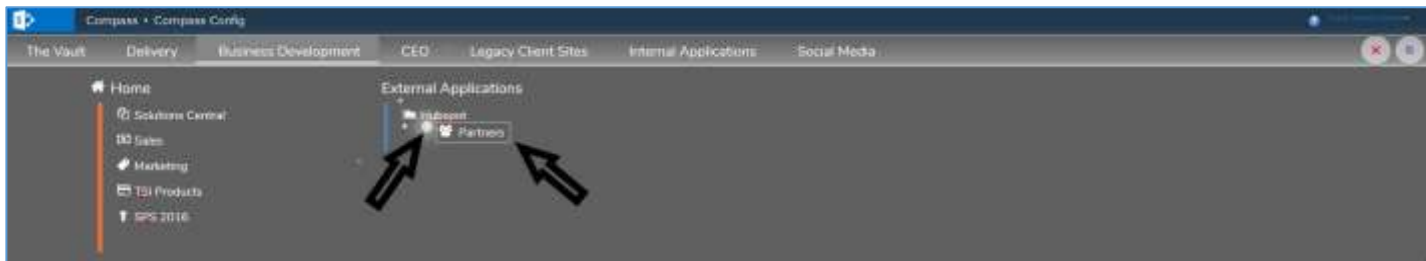


FIGURE 23

When you are done building out your navigation, be sure to click the save icon in the upper right-hand corner so that you don't lose your work!

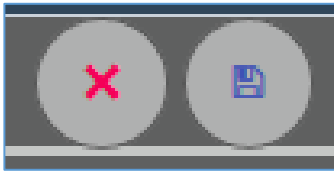


FIGURE 24

Once you're happy with your navigational structure, you can begin to configure your navigation to be branded how you want.

C. Stylistic Configuration Settings

Now that the structure of your navigation is ready, you can click on the 'Settings' or 'Styles' tabs and begin to personalize your SharePoint Compass.

On the settings menu, you can choose whether your navigation menu, when you click on it, will push the rest of your content down the page or if it will sit on top using the 'Menu Type' toggle.

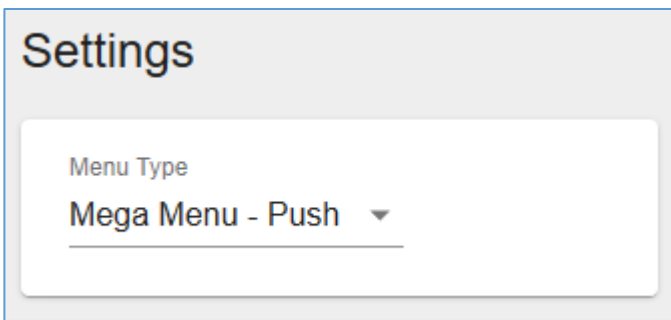


FIGURE 25

You can see both options below:

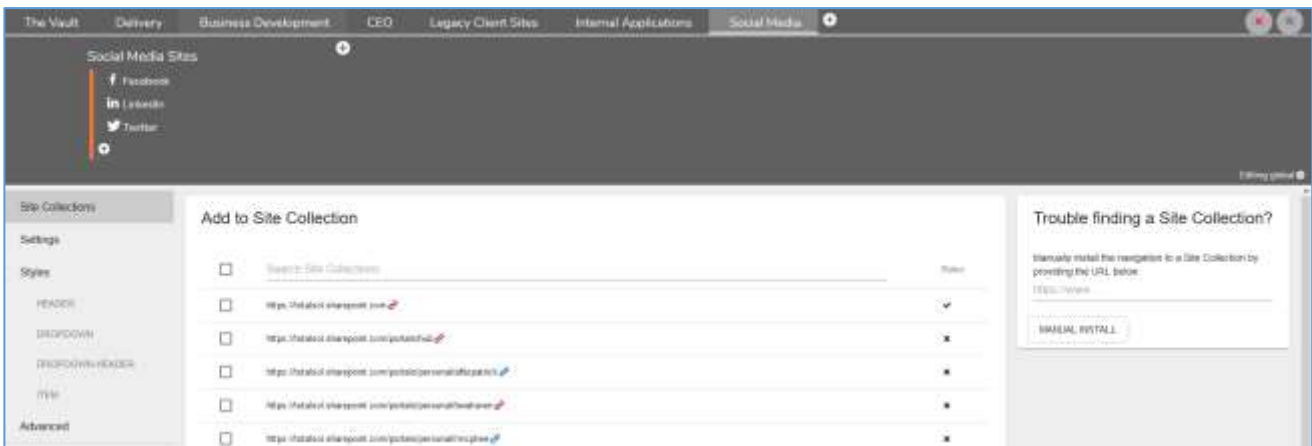


FIGURE 26 – Mega Menu – Push

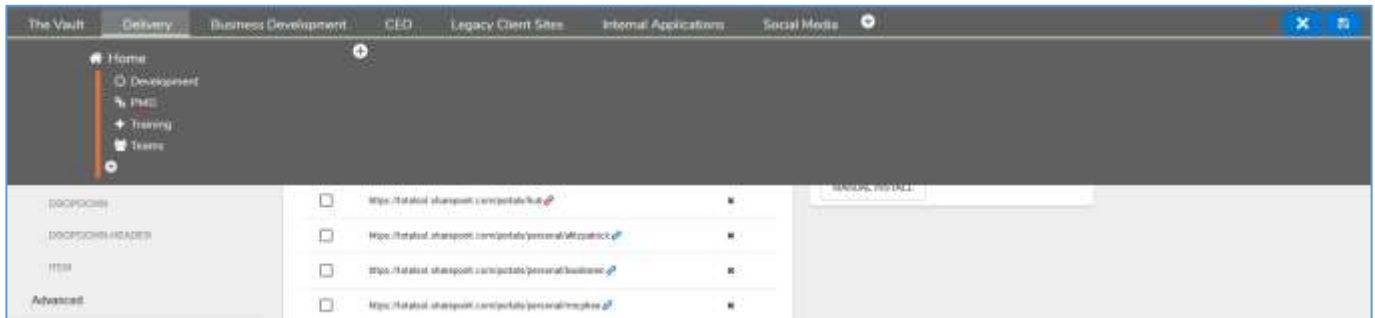


FIGURE 27 – Mega Menus – On Top

You can also choose to add some preset decorations to your navigation by using the toggle(s) below.

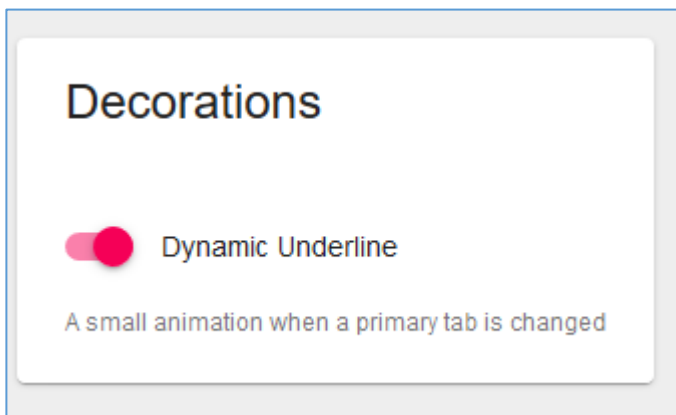


FIGURE 28

On the 'Styles' pages, you can change the font, font size, background color, border color and text color of various components of your navigation. To change from the defaults, click on the toggle in each box and enter the relevant information.

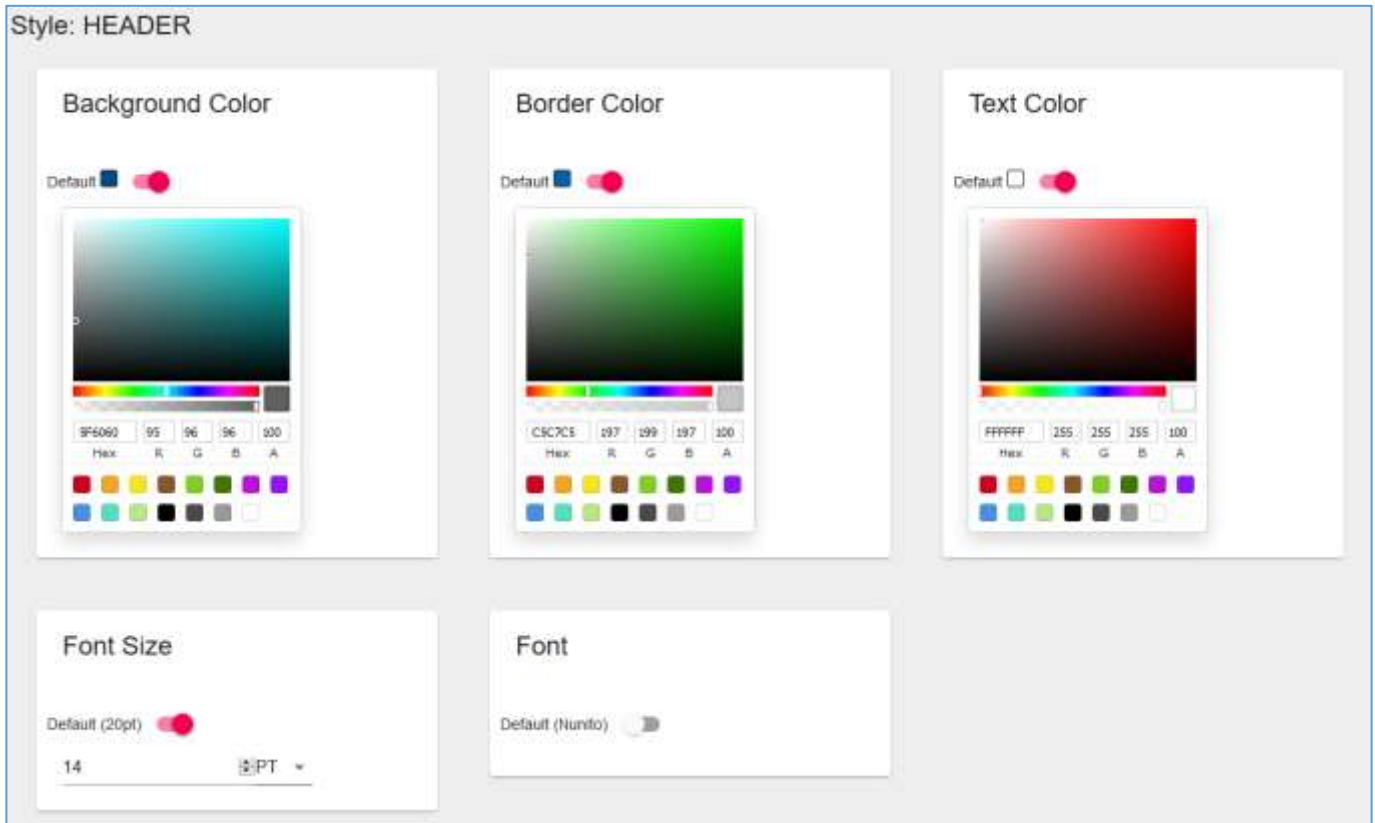


FIGURE 29

Colors can be selected in the color picker by entering the hex code, the RGB values, or the color slider boxes. When you are done updating your styles, click the save icon in the upper right corner to save your work.

V. *ADVANCED FEATURES*

A. Custom Styling

For those SharePoint Compass users with the Medium Business or Enterprise license, SharePoint Compass is customizable through the use of user-provided custom CSS. Navigating to the 'Advanced' tab will allow you to enter your custom code in the 'Custom CSS' box.

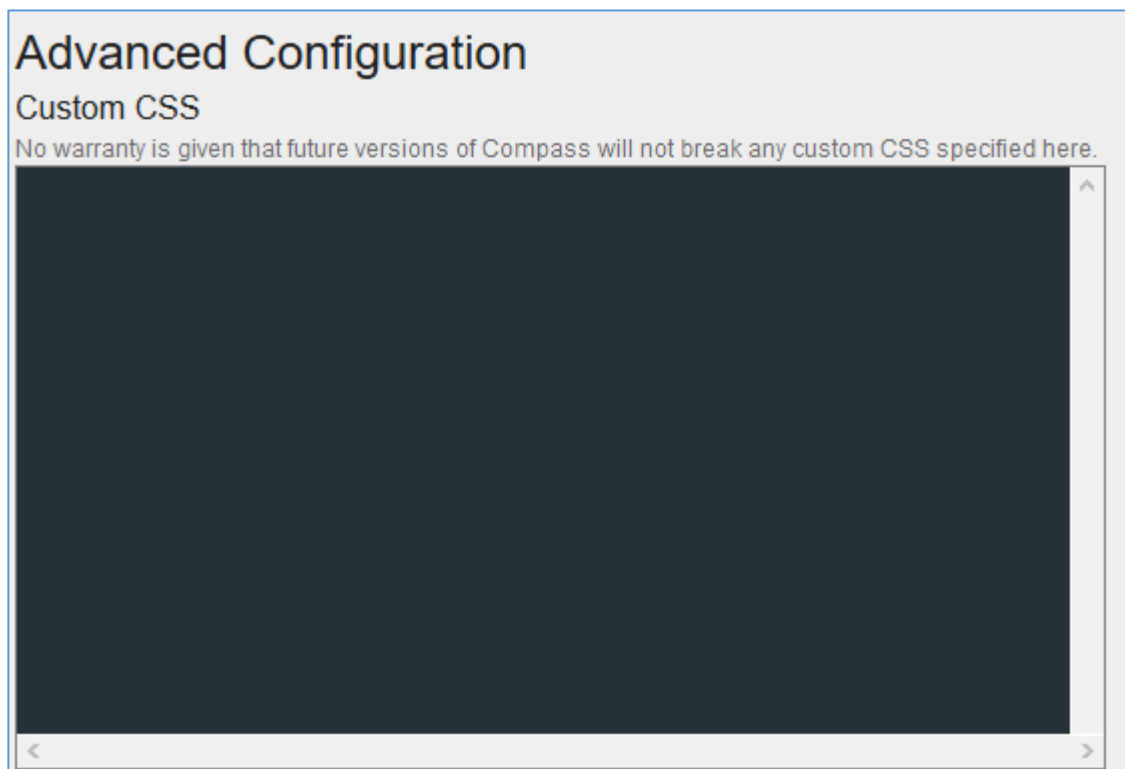


FIGURE 30

Please note that you may need to re-implement any custom CSS when upgrading to a new version of SharePoint Compass as no warranty is given that future versions will not break the custom code within this box.

The 'Reset Configuration' button at the bottom of the page will allow the user to restore all customizations made back to their original settings.

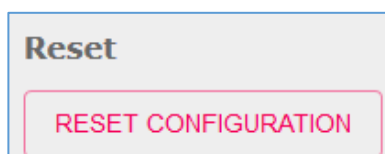


FIGURE 31

You can use the 'Backup' and 'Restore' buttons on this page to save your navigational links and styling as needed, as seen below.

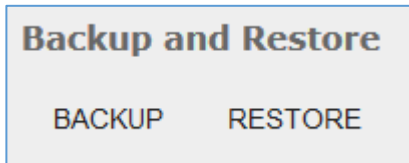


FIGURE 32

VI. PRICING & PAYMENT

Pricing for SharePoint Compass will be a license-based pricing with three license levels, as illustrated below.

	Basic	Premium
Global Navigation (SP 2013 and newer, SP Online, Classic and Modern UI)	Yes	Yes
Unlimited Site Collections	Yes	Yes
Drag-and-Drop Editor	Yes	Yes
Multiple Navigation Styles	Yes	Yes
Parent/Child Navigation Relationships	Yes	Yes
Real-time Style Customization	Yes	Yes
Library of Code-Free Decorations	Yes	Yes
Custom CSS with Real-time Preview	Yes	Yes
All Updates for Life of Subscription	Yes	Yes
One Navigation Design	Yes	No
Unlimited Navigation Designs	No	Yes
Per Site Collection Customization	No	Yes
Propagate Changes to Downstream Navigation	No	Yes
UI	No	Yes
Per Site Collection CSS	No	Yes

Per Site Collection Styles	No	Yes
Monthly Price OR	\$75.00/month	\$150.00/month
Annual Price	\$750.00 annually	\$1,500.00 annually

VII. UPGRADING

Note: Always refer to the user guide to the appropriate version for up-to-date upgrading instructions.

To upgrade to the most recent version of SharePoint Compass by Total Solutions Incorporated, always start by checking the prerequisites as described above. Next, download the latest version of Compass as outlined in the Installation instructions. Then, re-upload the downloaded version to the App Catalog, choosing to replace the existing version.

After uploading the new version to the App Catalog, navigate to the Site Collection created for the Compass configuration data and click Site Contents. Then, click the ellipses for the Compass App.

Select the indicated action within the Compass application for classic/modern as shown below:

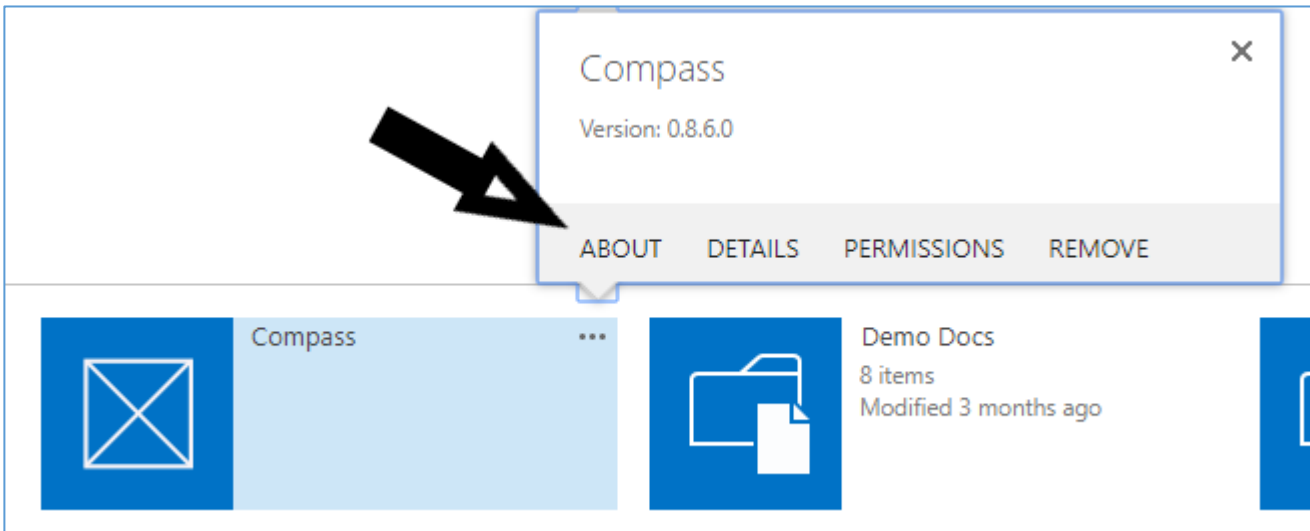


FIGURE 33 - Classic

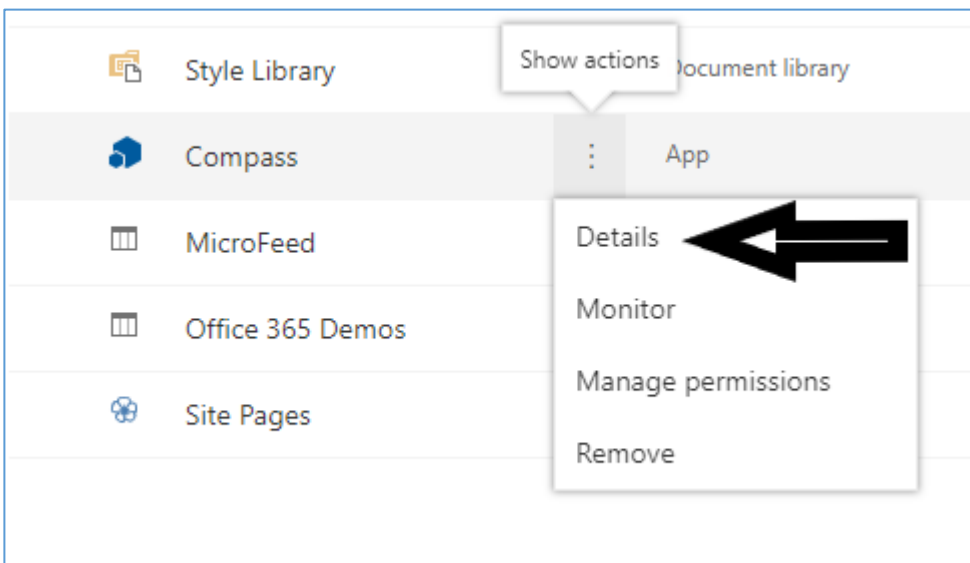


FIGURE 34 - Modern

Click “Get It” under the new version available alert.

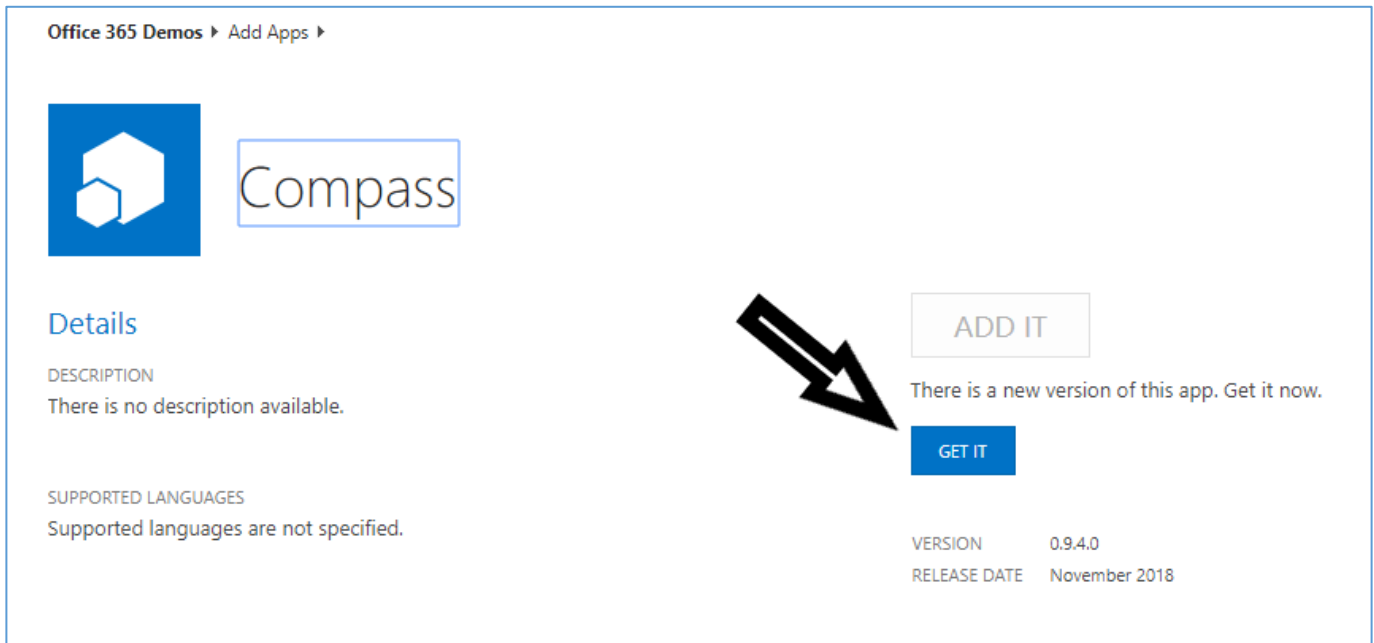


FIGURE 35

Wait for SharePoint to finish upgrading the instance of Compass.

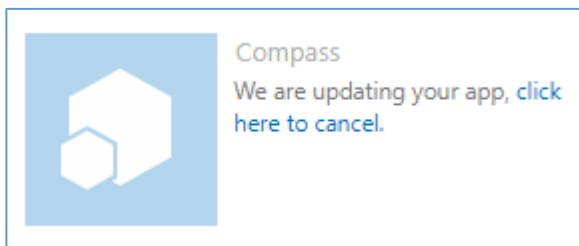


FIGURE 36 – Classic Upgrading




	Style Library	Document library	5	7/31/2018 12:54 AM
	Compass	App		8/31/2018 7:47 AM
	MicroFeed	List	2	8/3/2018 7:44 AM

FIGURE 37 – Modern Upgrading

Note: you may have to refresh the page to see when it is completed.

Once the upgrade is complete, click the Compass instance and follow the screens to accept the EULA to finish the upgrade process.

In some instances, depending on the previous version, Compass will prompt to install the latest SharePoint Modern support.

VIII. FAQ

The following are frequently asked questions regarding the installation, customization, and usage of SharePoint Compass by Total Solutions.

Q: What do I do about SharePoint's Out of the Box Navigation once I install SharePoint Compass?

A: There are several ways to handle SharePoint's OOTB Navigation once you've installed our product. The easiest way to encourage users to use SharePoint Compass is to simply delete the links in the out-of-the-box navigation.