

All Workspaces

ConneX

1

New Workspace

New Workspace

Workspace initial setup

2 What type of workspace would you like to create?

<p>Knowledge Includes all workspace templates focused on Knowledge management for...</p>	<p>Communication Includes all workspace templates focused on Communication for different...</p>	<p>Collaboration Includes all workspace templates focused on Collaboration for different...</p>
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3 Select a workspace template

<p>Knowledge Workspace (Teams) Knowledge workspace associated to a Microsoft Team.</p>	<p>Knowledge Workspace (SharePoint) Knowledge workspace associated to an Office 365 Group.</p>
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Adding a Workspace

1 How to Create a New Workspace:
- Within ConneX click on the New Workspace Button

2 What Type of Workspace would you like to create?
- Select a Workspace (Site Type)

3 Select a Workspace Template:
- Select if you would like the Workspace to be SharePoint & Teams or SharePoint only

4 If externally sharing

Do you wish to apply additional controls for external sharing? ⓘ

Yes No

5 Workspace essential metadata

Workspace Title *

Training

This workspace title is available

Workspace name (this becomes part of the URL) *

Training

https://clearpeople1com.sharepoint.com/sites/Training

This workspace name is available

Describe the purpose of the workspace

Connect employee's to training

Workspace essential metadata

4

Tagging Controls:

- Do you wish to apply additional controls?
- Yes - All metadata fields will be limited to a single value. Restricting what will be visible
- No - Restrictions will not be applied

5

Workspace Essential Metadata:

- Enter a Workspace Title (This will be verified to ensure no duplication)

Workspace Name:

- A naming convention is useful here e.g. CP Finance (Company Name & Dept)

What will the Workspace be used for?

- Enter this in the purpose

Language *

6

English ×

Location *

London ×

Activity *

Learning & Development ×

Entity *

Internal ×

Subject *

Know How Type ×

Department *

Success Department ×

7

Next

Workspace Managed Metadata

6

Workspace Managed Metadata:
- Language; Locations; Activity;
Entity; Subject; Department

i

Important:

- The Values you set here will be set as DEFAULT Tags on ALL content you create in this Workspace

7


Select Next to move onto Workspace Security

Workspace security

Select workspace privacy

8 Public Private

9 Who will be the owners? *

 Serena Phillips ×

Who will be the members?

Workspace Security

8

Workspace Security

- Do you wish the site to be Public or Private?
- Public - Everyone can use
- Private - Restricted to certain groups/users (e.g. Finance my wish to restrict their Workspace to those within the department only)

9

Who will be the Workspace Owners?

Enter individual names or groups names:

- Enter who you wish to be Owner(s)

Who will be the Workspace Members?

Enter individual names or groups names:

- Enter who you wish to be the member(s)

10 Workspace connections

What types of content should users be allowed to contribute with 'Add It'?

All
 Page
 Document
 Event
 Item
 External Insight

6/6 SELECTED

Workspace Connections

10

Select options available in 'Add It'

- All - Every option is selected
- Page - This adds a page to the Workspace
- Document - Upload a document directly into the Workspace
- Event - Add an event with description and times
- Item - Add a Useful Link; Mandatory Read; Spotlight or FAQ
- External Insight - Paste a URL to an external article
- Click on Submit to create the Workspace