

## Atlas ConneX

### All Workspaces

ConneX

**1**  
New Workspace

- 1** Workspace initial setup
- 2 Workspace essential metadata
- 3 Workspace managed metadata
- 4 Workspace security
- 5 Workspace connections

### Adding a Workspace

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

**i**  
Steps to Workspace creation:  
- On the left side of the screen you will see what steps need to be completed, and which step you are currently amending

2

## Workspace initial setup

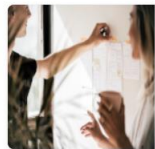
What type of workspace would you like to create?



**Knowledge**  
Includes all workspace templates focused on Knowledge management for different...



**Communication**  
Includes all workspace templates focused on Communication for different scenarios.



**Collaboration**  
Includes all workspace templates focused on Collaboration for different scenarios.

3

Select a workspace template



**Knowledge Workspace...**  
Knowledge workspace associated to a Microsoft Team.

Details



**Knowledge Workspace...**  
Knowledge workspace associated to an Office 365 Group.

Details

## Workspace initial setup

2

What Type of Workspace would you like to create?

- Select a Workspace (Site Type)

3

Select a Workspace Template:

- Choose if you would like the Workspace to be SharePoint & Teams or SharePoint only

- Click on details to see Workspace information (as shown on the next page)

## Knowledge Workspace (Teams) ×

### Description

Knowledge workspace associated to a Microsoft Team.

### Page templates (layouts)

Knowledge Landing Page  
 Knowledge Page  
 Location Page  
 News Page

### Managed metadata (term sets)

- 🔗 Information Type
- 🔗 Location
- 🔗 Department
- 🔗 News Type
- 🔗 Entity
- 🔗 Event Type
- 🔗 Activity
- 🔗 External Insights Type
- 🔗 Subject

## Workspace information



### Workspace Information

- Description of the Workspace
- Page Template Layouts
- Managed Metadata - Term Sets to filter information

## 4 Workspace essential metadata

Workspace title \* <sup>i</sup>

This workspace title is valid

Workspace name (this becomes part of the URL) \* <sup>i</sup>

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

This workspace name is available

Describe the purpose of the workspace <sup>i</sup>

## 5 Workspace managed metadata

### Tagging controls

Do you wish to apply additional controls to managed metadata fields? <sup>i</sup>

### Workspace essential metadata

4

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

5

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

## Atlas ConneX

### 6 General

Location \*

London × Like **\*\*Locations\*\***

Department \*

Success Department × Like **\*\*Departments\*\***

Entity \*

Internal × Like **\*\*Entities\*\***

Activity \*

Learning & Development × Like **\*\*Activities\*\***

Subject \*

How To × Like **\*\*Subjects\*\***

### 7 Specific

Information Type

Training Material × Type term to tag

News Type

\*Not Applicable\* × Type term to tag

Event Type

\*Not Applicable\* × Type term to tag

External Insights Type

\*Not Applicable\* × Type term to tag

Next

### Workspace Managed Metadata

6

Workspace Managed Metadata:

General:

- Location; Department; Entity; Activity; Subject;

i

Important:

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

7

Specific:

- Information Type; News Type; Event Type; External Insights Type

## Atlas ConneX

### 8 Workspace security

Select a workspace privacy \* <sup>i</sup>

Public

Private

Who will be the owners? \* <sup>i</sup>

 Serena Phillips ×

Who will be the members? <sup>i</sup>

Who will be the visitors? <sup>i</sup>

Next

### Workspace Security

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 may wish to restrict their Workspace to those within the department only)

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)

## Atlas ConneX

### 9 ▼ Workspace connections

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



6/6 SELECTED



### Workspace Connections

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 View Summary

## Atlas ConneX

- ✓ Workspace initial setup
- ✓ Workspace essential metadata
- ✓ Workspace managed metadata
- ✓ Workspace security
- ✓ Workspace connections

### Steps – Adding a New Workspace



Steps to adding a New Workspace:  
 Once all stages are completed a tick will be in each step

- Workspace initial setup
- Workspace essential metadata
- Workspace managed metadata
- Workspace Security
- Workspace Connections



## New workspace summary

T

Workspace title Training

Workspace name (URL) <https://clearpeople1com.sharepoint.com/sites/Training>

Workspace description Connect employee's to training

### Workspace setup information

Workspace template Knowledge Workspace (Teams)

Workspace type Knowledge

### Workspace security

Workspace privacy Public

Workspace owners Serena Phillips

Workspace members -

Workspace visitors -

### Workspace managed metadata

**General**

Location London

Department Success Department

Entity Internal

Activity Learning & Development

Subject How To

**Specific**

Information Type Training Material

News Type \*Not Applicable\*

Event Type \*Not Applicable\*

External Insights Type \*Not Applicable\*

### Workspace connections

Add It types Page, Document, Event, Item, External Insight



### New Workspace Summary

- New Workspace Summary**
- This provides a summary of all stages
  - It provides you with a chance to check all the information is correct before creating



- Confirm the Workspace information is correct**
- Click on Create Workspace button
  - Your Workspace will now be created

