
Omnia Documentation

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Note: Please find Omnia for Microsoft 365 documentation [here](#).

1.1 Introduction

This documentation is intended for administrators of Omnia Tenants. Settings and Controls in the following Omnia Products will be described here:

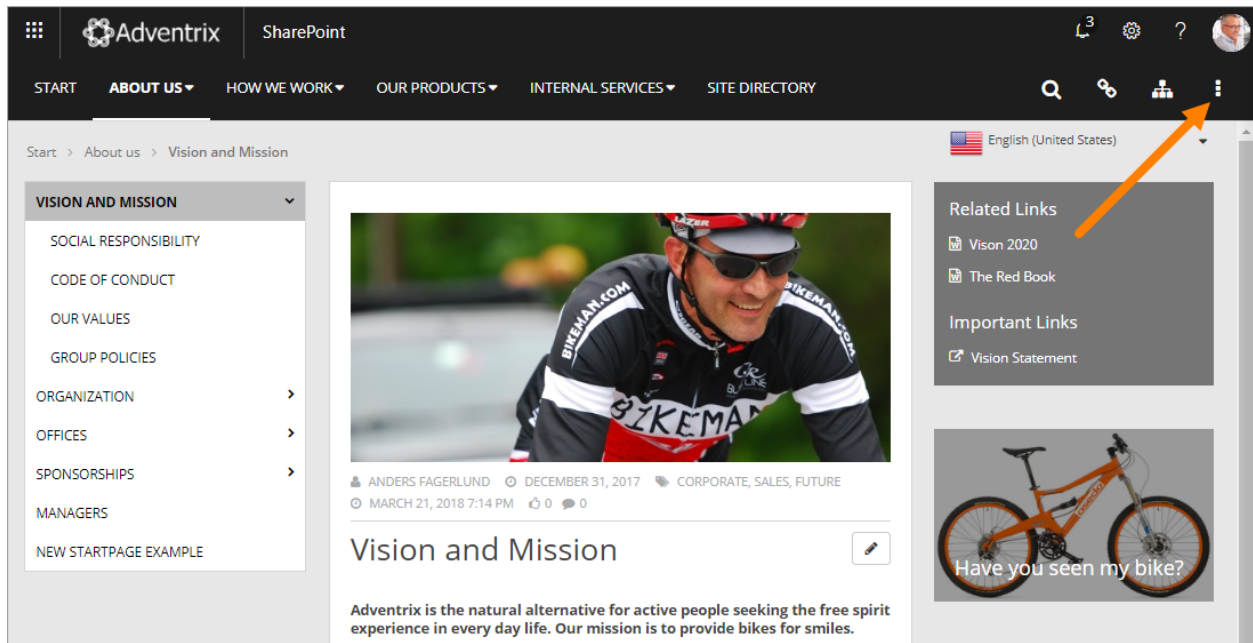
- Omnia Foundation
- Omnia Intranet
- Omnia Document Management
- Omnia Quality Management

You always have to have the necessary permissions to be able to edit settings. If you can't find any of the options described on this page, you are not permitted to edit settings.

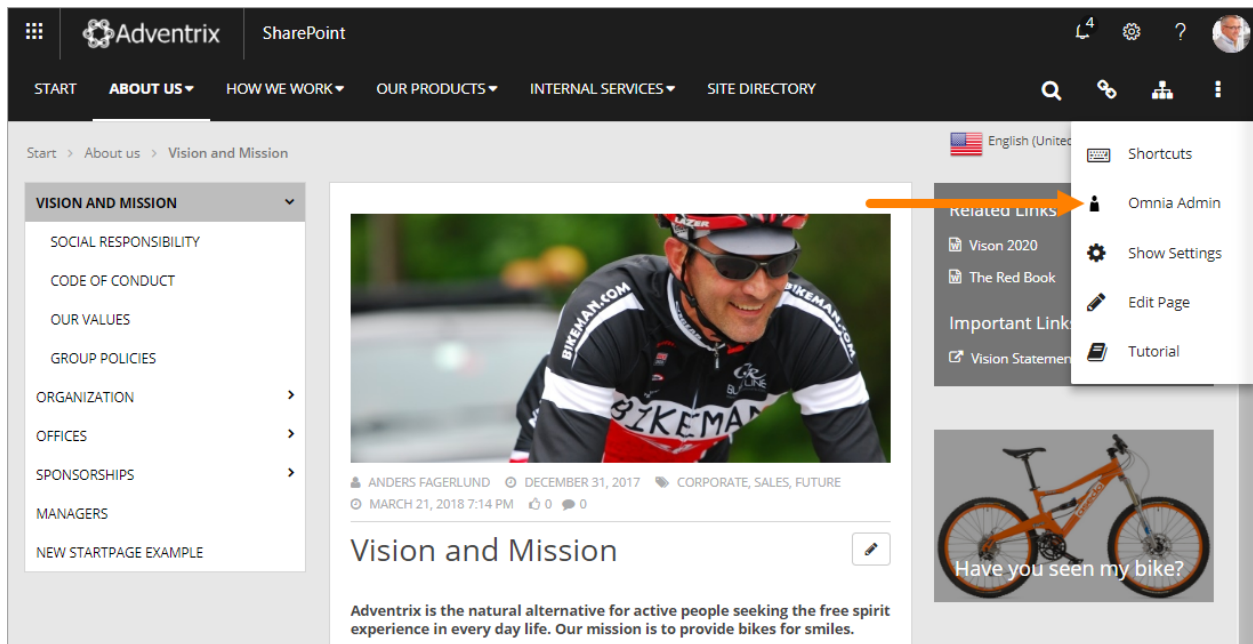
1.1.1 Omnia Admin settings

You find the settings in Omnia Admin the following way:

1. Open the Actions Menu.



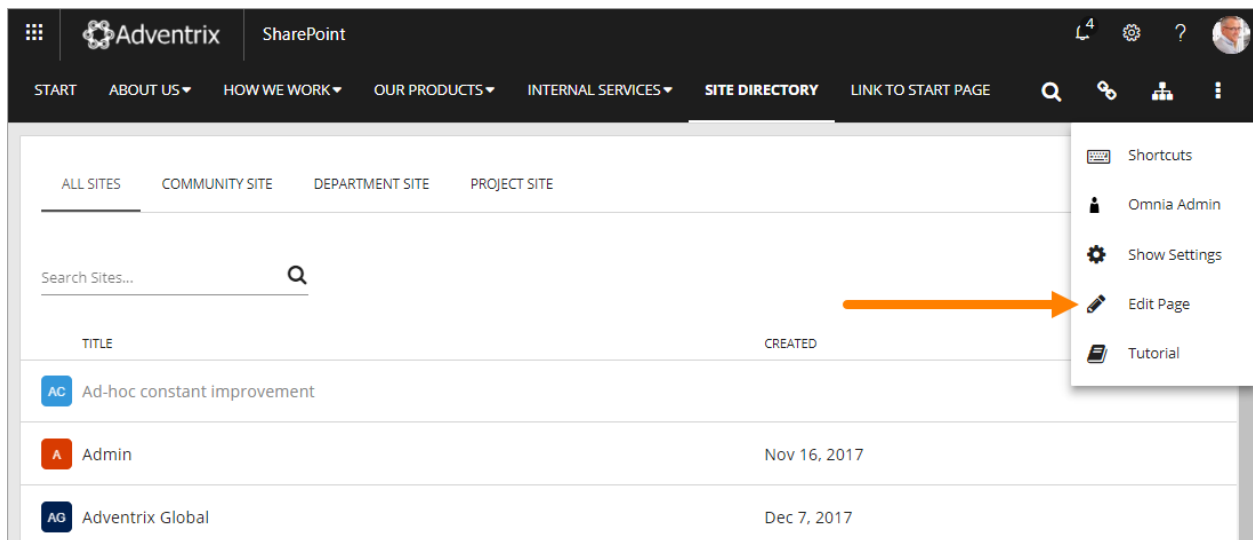
2. Select “Omnia Admin”.



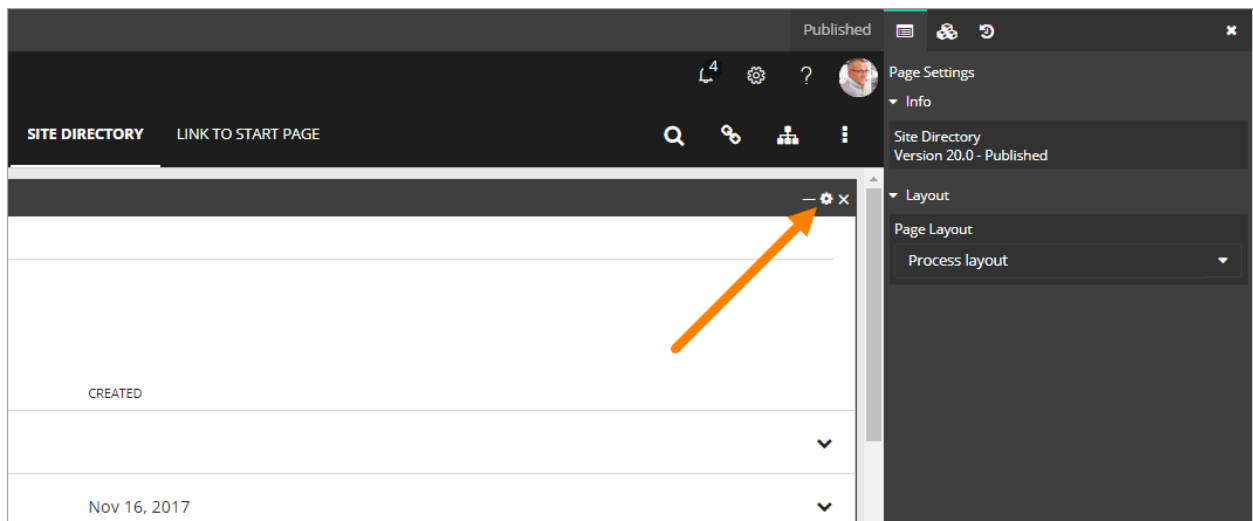
1.1.2 Settings for a control

Most Omnia Controls has additional settings. Settings for a control are normally control scoped. To edit settings for the control, do the following:

1. Go to the page where the actual control is placed.
2. Open the Actions Menu and select “Edit Page”.



3. Open the settings by clicking the cog wheel, for example:



Note! You have to point at the right control heading to see the cog wheel. The control heading is not shown until you point at it.

1.1.3 To add a control to a page

The first step is always to add a web part to a legacy page or a block to a Quick Page, for the control.

Here's how to add a web part to a legacy page:

1. Go to the page.
2. Edit the page in advanced mode.
3. Add the web part to a suitable web part zone. The web part is found in the "Omnia" Category.
4. Check in the page. (You must do that to be able to access the settings.)

Here's how to add a block to a Quick Page:

1. Go to the page.

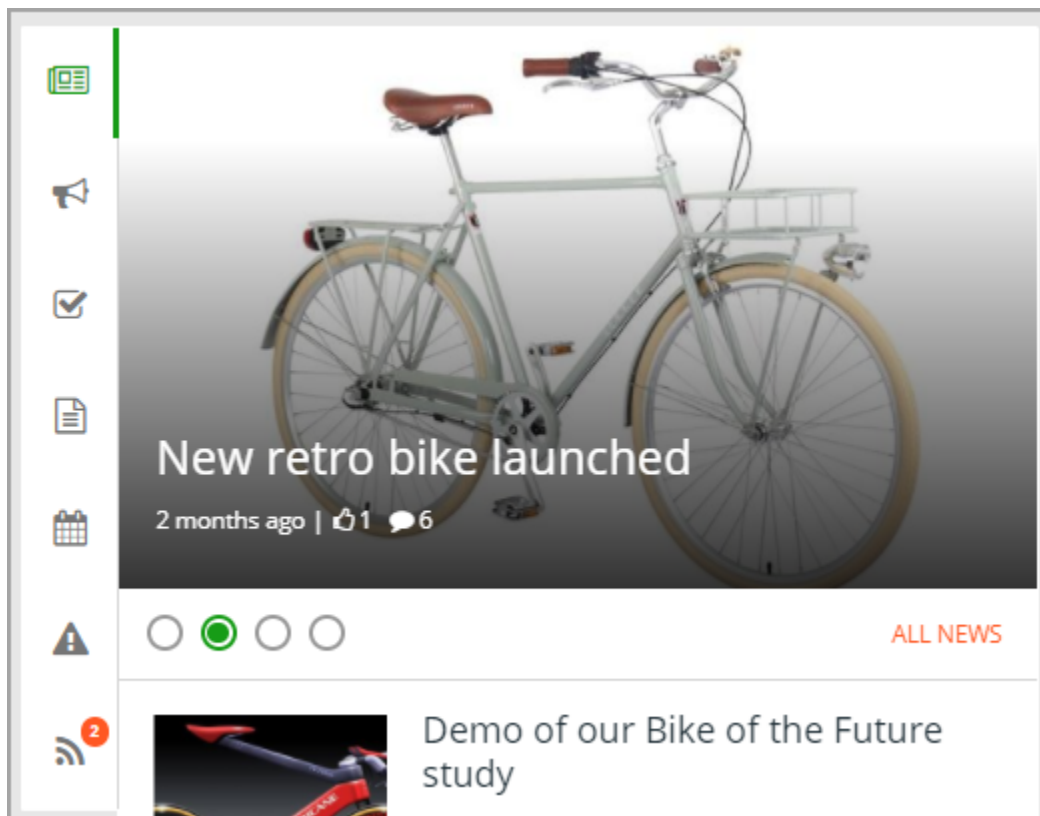
2. Open the Actions Menu and select “Edit page”.
3. Open the list of blocks.
4. Use drag and drop to add the block to a suitable area.

To access the settings for the control, see above.

1.2 My Workplace

1.2.1 Notification Panel

The notification panel is a concept in Omnia Intranet mainly used on a start page. The purpose is to help end users find out what information has been updated within different areas of the intranet. There are a number of settings for the visual appearance, here’s a common example:



The following built-in controls, if added, will generate automatic notifications in the Notification Panel:

- Aggregated Calendar: New events appearing in the view.
- Announcements: When a new announcement is posted which the current user has read access to.
- Controlled Documents Subscription: When a Controlled Document the user subscribes to has been updated (Omnia Document Management functionality).
- Important Announcements: When a message is published by an administrator, using the Important Announcement option.
- Last Updated Documents: When a document has been modified by someone else, in a team site that the current user is following.

- **My Recent Documents:** A listing fo the user's recently edited documents, for easy access.
- **My Tasks:** When new tasks are assigned to the current user.
- **News Viewer:** When a new news article is published that the user has read access to.
- **User Feed:** When new posts are added to a classic user feed in any of the team sites where the user is member.

Notification Panel Settings

The following settings are available:

Category Settings

Here you can add, edit and delete categories to be displayed in the Notification Panel. To the left is the list of categories, to the right you can see the settings for the selected category. You can set the rendering order for the categories by using drag and drop.

The screenshot shows a 'Notification Panel Settings' dialog box with a close button (X) in the top right corner. It features three tabs: 'Category Settings' (selected), 'Layout', and 'Custom Colors'. Under 'Category Settings', there is a list of categories: 'News', 'Announcements', 'Tasks', 'Documents', 'Calendar', 'Important', and 'RSS'. A trash icon is next to 'News', and a '+ Add Category' link is at the bottom. The 'News' category is expanded, showing its configuration: 'Title' (text field with 'News'), 'Icon' (icon picker with a 'Browse' button), 'View Controls' (a dropdown menu showing 'Script/Html' and a '+ Add' button), and 'Notification' (radio buttons for 'Automatic' and 'Custom', with 'Automatic' selected). Below the view controls, two 'News Viewer' entries are listed, each with edit and delete icons. At the bottom of the dialog are 'Save' and 'Close' buttons.

Add Category

If you would like to add a new category in the notification panel, follow these steps:

1. Click “Add Category” on the left-hand side.
2. Add a category title and select an icon from the Font Awesome library.
3. Add one or more available view controls (installed in Omnia) from the list.
4. You can sort the rendering order of the view controls using drag and drop.
5. Select notification type: Automatic or Custom. Automatic can be used on all Omnia view controls. This means that the notification count on the category will be calculated based on the result in the view. A custom notification service can be used for legacy web parts or view controls that require specific business logic.

Edit Category

Follow these steps to edit a category:

1. Click on any of the existing categories on the left-hand side.
2. Change title, icon or view controls etc.
3. Click “Save”.

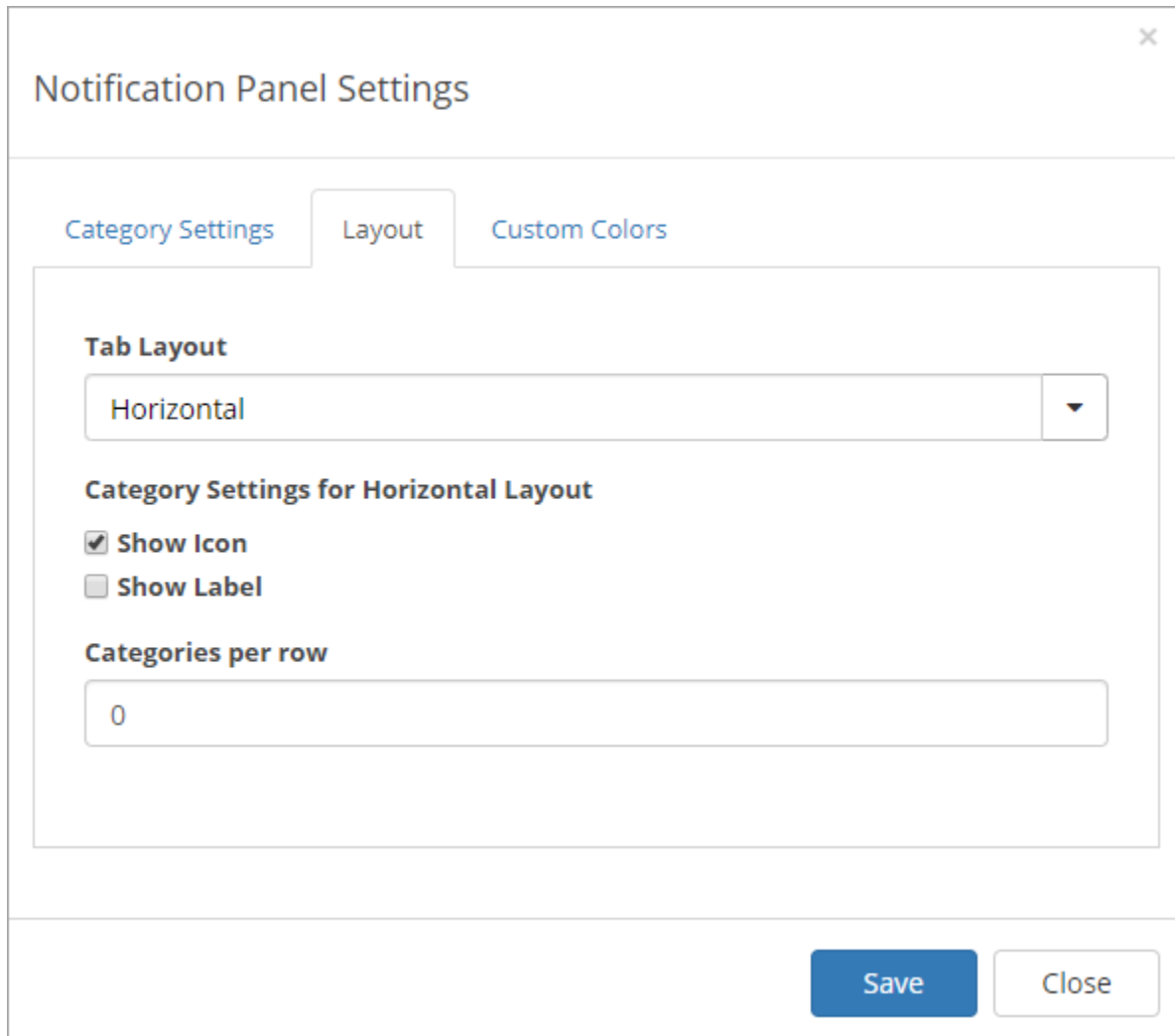
Delete Category

Follow these steps to delete a category:

1. Hover any of the existing categories on the left-hand side.
2. Click on the remove icon.
3. Click “Save”.

The Layout tab

Here, the following settings are available:



The image shows a 'Notification Panel Settings' dialog box with a close button (X) in the top right corner. It has three tabs: 'Category Settings' (selected), 'Layout', and 'Custom Colors'. Under the 'Category Settings' tab, there is a 'Tab Layout' section with a dropdown menu currently set to 'Horizontal'. Below this is a 'Category Settings for Horizontal Layout' section containing two checkboxes: 'Show Icon' (checked) and 'Show Label' (unchecked). At the bottom of this section is a 'Categories per row' input field with the value '0'. At the bottom right of the dialog are 'Save' and 'Close' buttons.

- **Tab Layout:** Select Tab Layout: “Responsive” - On small screens the tabs will be shown horizontally, on larger screens it will be shown vertically; “Horizontal” - The tabs will always be shown horizontally; “Vertical” - The tabs will always be shown vertically. Note! Additional design can be applied using a customer specific CSS extension.
- **Category Settings for Horizontal Layout:** These settings are available for “Responsive” and “Horizontal”. Select to show icons and labels or not, in the Notification Panel.
- **Categories per row:** This settings is available for “Responsive” and “Horizontal”: Use it to set the number of categories to be shown on each “page” in the Notification Panel. Set to 0 for no limit, which is the default.

The Custom Colors tab

You should primarily set colors through Theme colors in Omnia Admin (System/Settings/Default colors). If you still would like custom colors for the control, you can set them using this tab.

Notification Panel Settings

Category Settings

Layout

Custom Colors

Background Color

Active Background Color

Icon Color

Active Icon Color

Notification Count Color

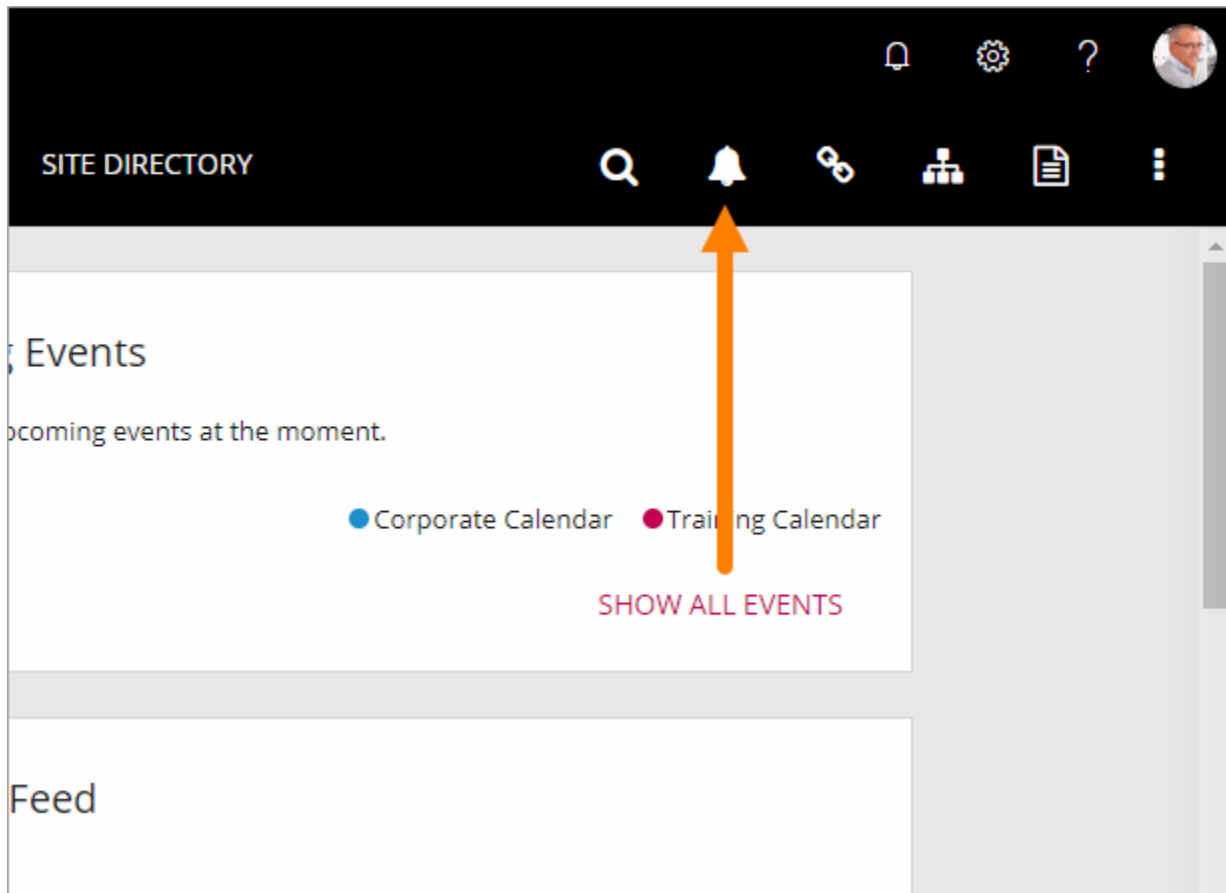
Border Color

Save

Close

Notification Panel in Header

A Notification Panel can also be placed in the Header. It has to be activated in Omnia Admin. When it is, an icon is shown:




This Notification Panel has it's own settings. Do the following to access them:

1. Edit the page.
2. Show Settings.
3. Open the settings for the Notification Panel by clicking the cog wheel.

Something like the following is shown:

Notification Panel Settings

CATEGORY SETTINGS CUSTOM COLORS LAYOUT

Team News 



Tasks


Documents

Important



+ADD CATEGORY

Category Title
Team News

Icon
 fa-bullhorn 

View Controls 

ADD

Announcements  

☐ Use Custom Notification

SAVE

CANCEL

These settings works exactly the same as for other Notification Panels, see above.

1.2.2 User Feed

Setup User Feed

1. Go to Omnia Admin > Features.
2. Activate the tenant scoped feature “Omnia User Feed”.
3. The user feed block will now be available.
4. If you need to deploy a legacy web part for the user feed block, activate the site collection feature “Omnia User Feed Web Part”.

Setup Everyone Site

To be able to post to all people in an organization, you need to configure an “Everyone Site” for the user feed. You can set up a new site in SharePoint for this, but the recommended setup is to use the main publishing site in your intranet. Follow these steps to do this.

1. Go to the start page of the main publishing site.
2. Go to Site Settings > Site Features.
3. Activate the SharePoint feature “Site Feed”.
4. Go to Site Contents.
5. Go to the Settings of the MicroFeed list.
6. Go to Permissions for this list.
7. Click on Stop Inheriting Permissions.
8. Change the permissions on the Visitor group from Read to Contribute.
9. Configure the user feed block on the start page to use the main publishing site as the Everyone Site.

Note! The User Feed in Omnia is based on the SharePoint Newsfeed. Microsoft recommends using other techniques withing the Microsoft 365 suite for social capabilities.


Please read more here: <https://techcommunity.microsoft.com/t5/Microsoft-SharePoint-Blog/In-June-2018-we-re-making-changes-to-the-native-social/ba-p/178430>

The Omnia User Feed can be added as a web part on a legacy page or as a block on a Quick Page. The User Feed can also be part of the Notification Panel.


My Social Feed

Share with **Everyone** ▼

Start a conversation





POST



Robert Johnson • Intranet

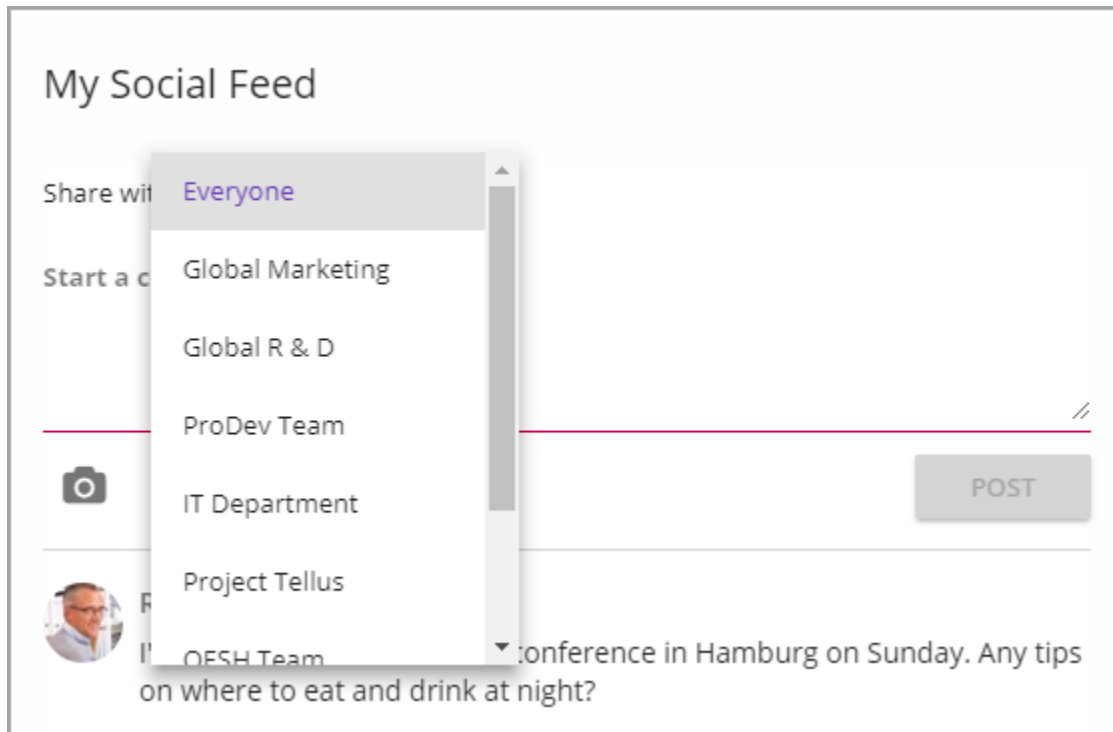
I'm off to the Mountain Bike conference in Hamburg on Sunday. Any tips on where to eat and drink at night?



 **Anna Karlsson** like this

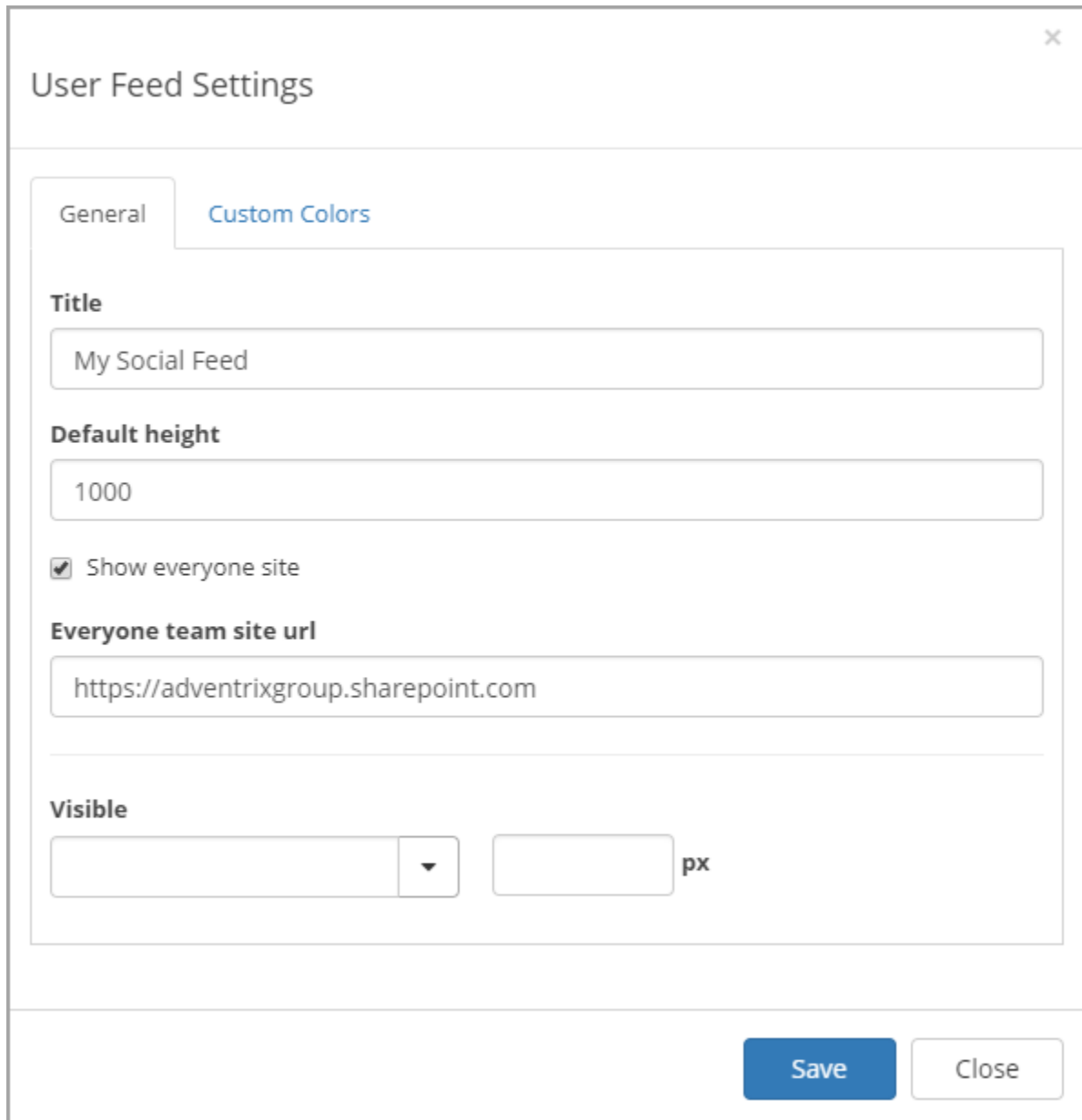
2 months ago **LIKE** **REPLY**

When posting a message here, users can select to make it available to everyone (if the option is activated, see below) or just to members of a certain team site. The list displays team sites the user is following.



User Feed settings

The control has the following settings:



The image shows a 'User Feed Settings' dialog box with a close button (X) in the top right corner. It has two tabs: 'General' and 'Custom Colors'. The 'General' tab is active and contains the following fields:

- Title:** A text input field containing 'My Social Feed'.
- Default height:** A text input field containing '1000'.
- Show everyone site:** A checkbox that is checked.
- Everyone team site url:** A text input field containing 'https://adventrixgroup.sharepoint.com'.
- Visible:** A section with a dropdown menu (currently showing a downward arrow) and a text input field followed by 'px'.

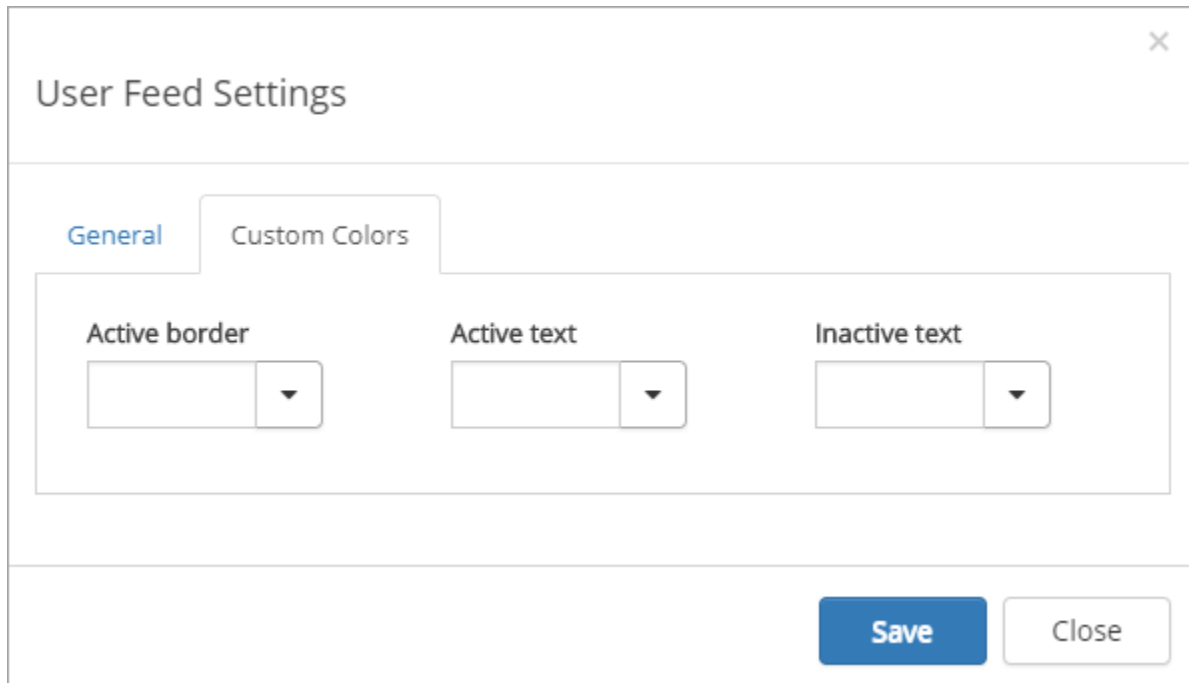
At the bottom right of the dialog are two buttons: 'Save' (in blue) and 'Close' (in white).

The General tab

- **Title:** You can edit the title displayed for the list.
- **Default height:** Set the default height in pixels. When there is more to display in the list, a “Show more” button is shown (see image at the top of the page).
- **Show everyone site:** If it should be possible to post a message to everyone, select this option.
- **Everyone team site url:** For posting to Everyone to work, a url to a site all users has access to, must be inserted here. See the set up instructions for more information.
- **Visible:** You can edit settings for when this control should be visible on a smaller screen. You can select “Always”, “Max width”, “Min width” and set the width in pixels.

The Custom colors tab

You should primarily set colors through Theme colors in Omnia Admin (System/Settings/Default colors). If you still would like custom colors for the control, you can set them using this tab.



The image shows a 'User Feed Settings' dialog box with a close button (X) in the top right corner. It has two tabs: 'General' and 'Custom Colors'. The 'Custom Colors' tab is active. Inside this tab, there are three settings: 'Active border', 'Active text', and 'Inactive text'. Each setting has a color selection box and a dropdown arrow. At the bottom right of the dialog, there are 'Save' and 'Close' buttons.

User feed in the notification panel

In the notification panel “Notification” should be set to “Custom” and “News Feed Notification Provider”.


My Links

☒ Show all links


☒ Show categories

Filter links...


Business Systems


Axapta Web

★


Claims Management

★

CRM


Production Planner


★

Visma Project Portal


★

Demo


Demo Startpage

★


External


Adventrix Public Web


★

Bikers Portal

★


External News

★

Wheels Web


★

FTP

FTP Link Test


★


Göteborg

Matsedel restaurangen i Göteborg

★

iLinks

My iLinks

★




20

ADD PERSONAL LINK

Chapter 1. Topics

- **Show all links:** Select to show all common links.
- **Show categories:** Select to show category headings for the links. If not selected the list of links is shown in alphabetical order. If selected the list is shown, sorted on the category headings, in alphabetical order (as in the image above).
- **Filter links...:** The list can be filtered using this field.
- **Add personal link:** This option can be used to add personal links to the list, see below.

Available icons to the right in this list is used this way:

-  This icon can be clicked to select to show, or not to show, a non-mandatory link. A black star indicates that the link will be shown, a grey star that the link will not be shown. Note: if the user selects “Show all links”, all common links are always shown, regardless of this selection. Also note the important difference when used for personal links. When the star is clicked for a personal link, the link is removed.
-  This icon indicates that information about the link is available, and can be read by clicking the icon.
-  This icon can be clicked to edit a personal link.

Adding personal links

A user can add a personal link by clicking the option “ADD PERSONAL LINK” and using the following settings:

←

Create link

×

Details

Title

Url

Category

Information

☐

Open in New Window

Style

Icon Type

Built-in

Icon

fa-link

Icon Background Color

Icon Preview

SAVE

CANCEL

- **Title:** The title for the link, shown in the list.
- **Url:** The link url.
- **Category:** Links that share the same category will be grouped together when “Show categories” is selected.
- **Information:** It is optional to add information about the link. If added, an i-icon will be shown.
- **Open in New Window:** Defines whether to open the link in a new window or not.
- **Icon:** The user can select from built-in icons based on Font Awesome or any image uploaded to a document library in SharePoint.

- **Icon background color:** The background color for the icon here. If not set the default icon background color will be used.

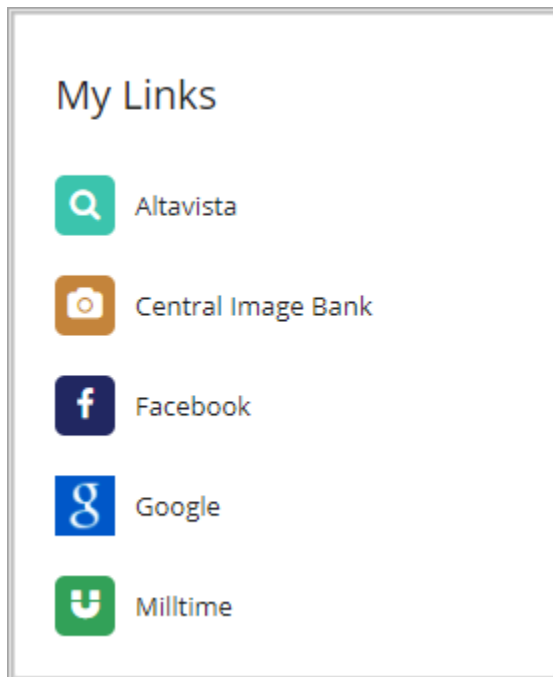
My Links Mobile Navigation

The My links control will not be shown when the screen is below a certain width. When the my links control is hidden, the mobile navigation will be shown. The mobile navigation includes the list of my links, but the user cannot add/remove links from the list.

My Links Web Part and block

My links can also be added to any legacy page as a web part and to any Quick Page as a block. Mandatory links, links the user have selected and personal links will be displayed. The links list can not be altered through the web part/block. The my links web part/block settings are web part scoped.

Here's an example where My Links is used as a block:



Settings for the control

The following settings are available:

The screenshot shows a 'My Links Settings' dialog box with a close button (X) in the top right corner. It has two tabs: 'General' and 'Custom Colors'. The 'General' tab contains the following settings:

- Title:** A text input field containing 'My Links'.
- Sorted By:** A dropdown menu set to 'Alphabetic'.
- View Template:** A dropdown menu set to 'Simple List'.
- Item Limit:** A text input field containing '10'.

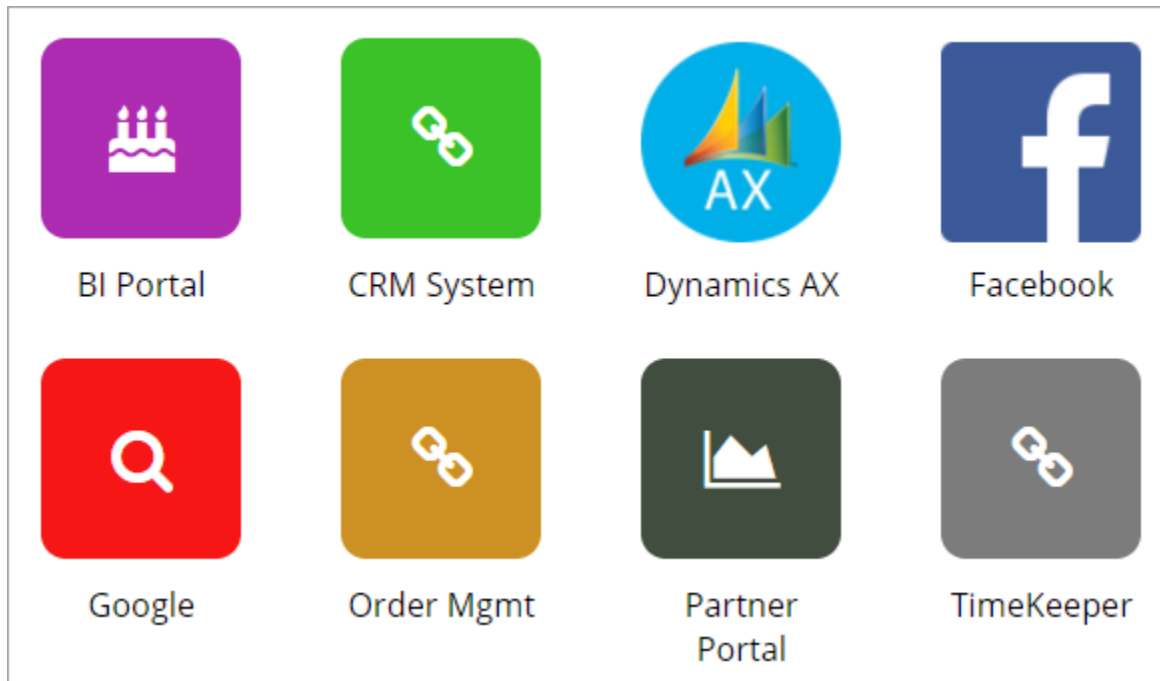
On the right side of the dialog, there is a preview titled 'My Links' showing three links, each with an app icon and the text 'Link 1', 'Link 2', and 'Link 3' respectively. Below the preview is a 'Show more' link. At the bottom right of the dialog are 'Save' and 'Close' buttons.

General

On the General tab you can set the following:

- **Title:** Add the title to be displayed for the web part/block.
- **Sorted by:** Choose to sort the list alphabetically or in order by last visited.
- **View Template:** Select how to display the links, as a simple list or as app icons. (See below for some examples app icons.)
- **Item Limit:** The maximum number of items to display before a “Show more” link appears.

Here’s some examples of app icons:



Custom Colors

You should primarily set colors through Theme colors in Omnia Admin (System/Settings/Default colors). If you still would like custom colors for the control, you can set them using this tab.

×

My Links Settings

General

Custom Colors

Background Color

▼

Icon Color

▼


Link Color


▼


Border Color

▼

My Links

 Link 1

 Link 2

 Link 3

Show more

Save

Close

1.2.4 Common Links

Common Links is a tenant scoped feature - the settings are used across all SharePoint sites in Omnia. It makes it possible to create a central list of links, in Omnia Admin, to resources that are commonly used within the organization.

Some links can be mandatory and it's also possible to target links to certain groups. Permissions to work with Common Links can be delegated to other colleagues.


The end user can access the common links in the My Links control. The list contains all active links. The user can decide which non-mandatory links to display and can add personal links there. Here's an example:


My Links ×


☒ Show all links ☒ Show categories


Filter links... ▼


Business Systems

 Axapta Web ★


 Claims Management ★

 CRM


 Production Planner ★


 Visma Project Portal ★


Demo


 Demo Startpage ✎ ★

External


 Adventrix Public Web ★

 Bikers Portal ★


 External News i ★

 Wheels Web ★


FTP

 FTP Link Test ★

Göteborg

 Matsedel restaurangen i Göteborg ★

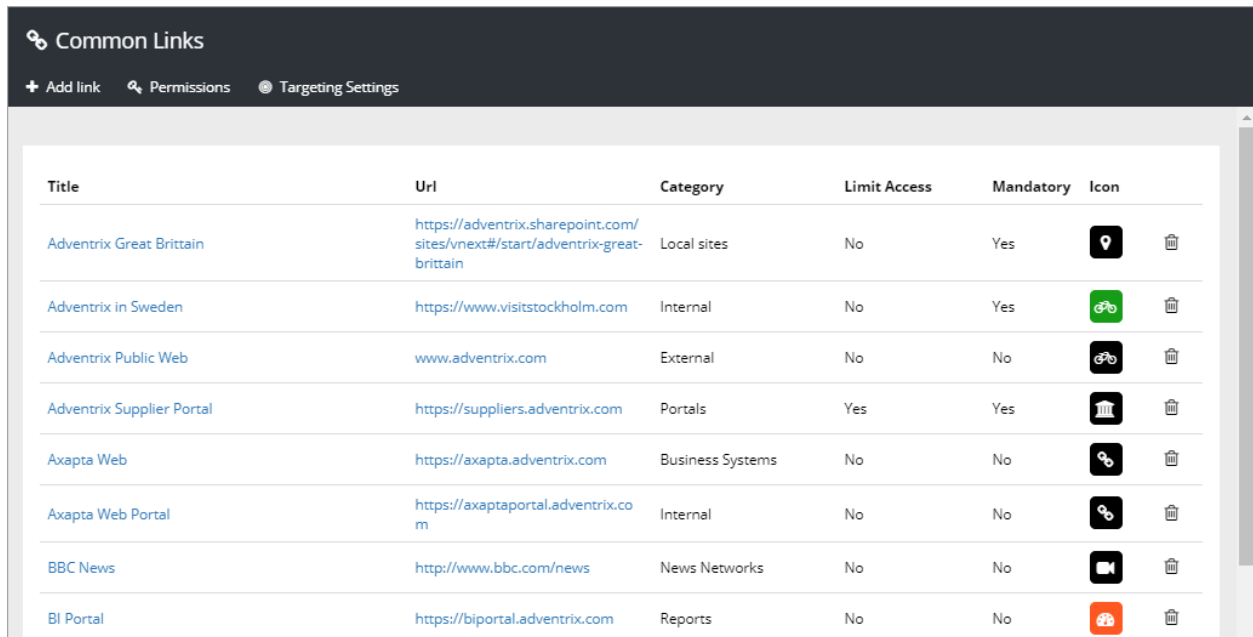
iLinks









 My iLinks ✎ ★

1.2. My Workplace

The Omnia Admin settings

The existing links are shown in the Common Links list, for example:



Title	Url	Category	Limit Access	Mandatory	Icon
Adventrix Great Britain	https://adventrix.sharepoint.com/sites/vnext#/start/adventrix-great-brittain	Local sites	No	Yes	
Adventrix in Sweden	https://www.visitstockholm.com	Internal	No	Yes	
Adventrix Public Web	www.adventrix.com	External	No	No	
Adventrix Supplier Portal	https://suppliers.adventrix.com	Portals	Yes	Yes	
Axapta Web	https://axapta.adventrix.com	Business Systems	No	No	
Axapta Web Portal	https://axaptaportal.adventrix.com	Internal	No	No	
BBC News	http://www.bbc.com/news	News Networks	No	No	
BI Portal	https://biportal.adventrix.com	Reports	No	No	

To edit a common link, click the Title in the list. The same window as when you add a new link is shown, see below.

To delete a common link, click the dustbin for the link.

Add link

Use this window when adding a new common link or editing an existing:

Add link

Title

Url

Category

Information


☐ Open in New Window

Targeting Settings

☒ No targeting
☐ Target to

☐ Mandatory

Icon



Built-in
▼

fa-link
Browse

Icon Background Color

▼

Save

Close

- **Title:** The title is shown as the clickable text, in My links.
- **Url:** The url to go to when the user clicks the link.
- **Category:** Links that are the same category will automatically be sorted together when the user chooses to display the categories. (in the My Links example above, the links are sorted by Category).
- **Information:** This field can be used for additional information about the link. If you enter something here, an information icon is shown next to the link, in My links. Users can click the icon to read the information. Not mandatory.
- **Open in New Window:** Select to open the url in a new browser window. Normally a good idea for external

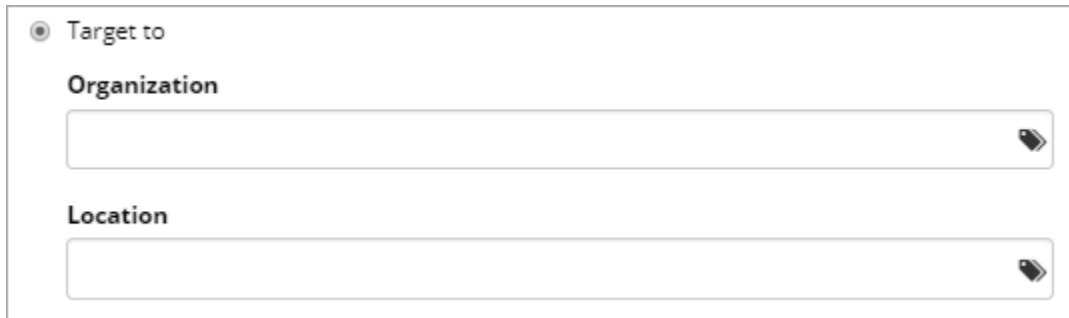
links.

- **Mandatory:** If selected, the link is always shown for all users (or the limited set of users, if targeted), and can not be deselected.
- **Targeting settings:** Select “Target to”, to target the link to a certain group. See more information about targeting below.
- **Icon** An icon is always shown for a link. If you would like another icon for this link, select the “Built-in” icon set or “Custom”, and choose icon.
- **Icon Background Color:** Set the background color for the icon here. If not set, default icon background color is used.

Targeting a link

A link can be targeted to any receivers that has been defined in the Target Definition selected for Common Links. A targeted link is only available for selection by the target group. No one else will see the link. For more information on Targeting Definitions, see: [Targeting Definitions](#)

When you select “Target to”, the the available target groups are shown, for example:

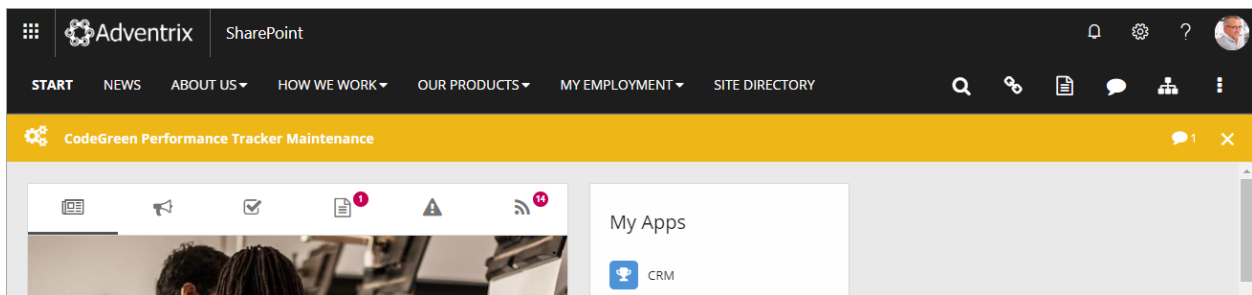


You select targets for the links from the list(s) the normal way.

1.2.5 Cross Site Header

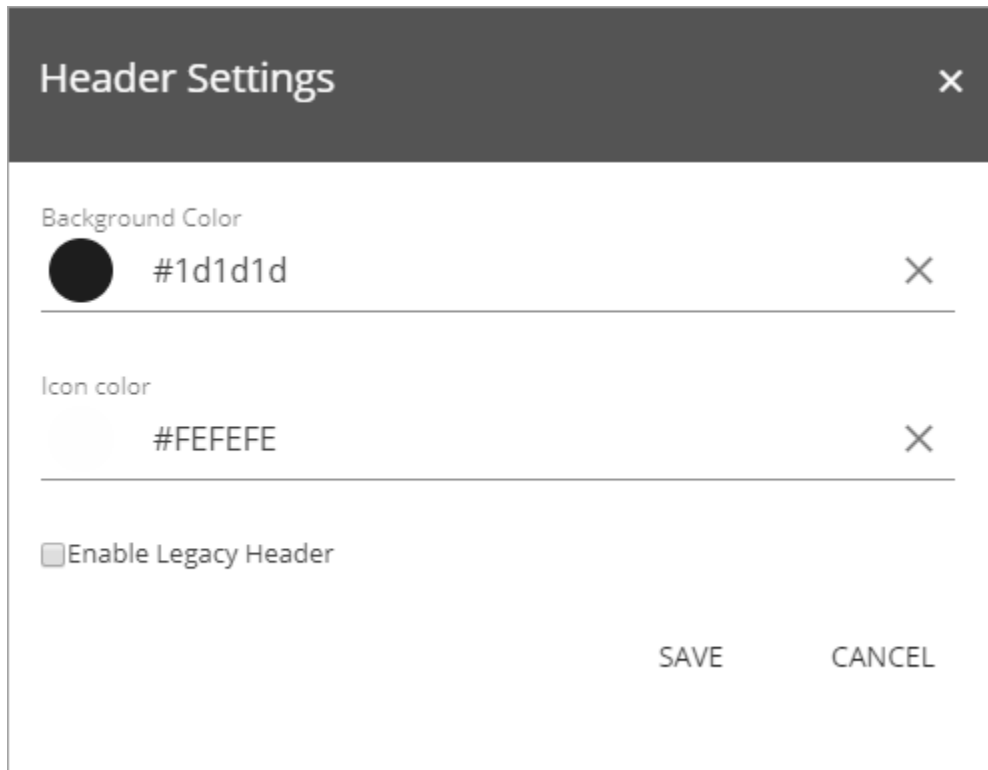
The Omnia Cross Sites Header is shown in all sites in the tenant and it’s where the main menu (the Cross Sites Mega Menu), the logo (which can be used to go back to the start page), Quick Search, and other options like My Links and My Sites can be found. An actual Cross Site Header for a specific site is based on the navigation from the default site in the Omnia Profile the actual site belongs to.

Here’s an example of a Cross Site Header:



The settings

The following settings are available:



The image shows a 'Header Settings' dialog box with a dark header bar containing the title and a close button. The main area is white and contains three settings: 'Background Color' with a black circle icon and the hex code #1d1d1d, 'Icon color' with the hex code #FEFEFE, and a checkbox labeled 'Enable Legacy Header' which is currently unchecked. At the bottom right are 'SAVE' and 'CANCEL' buttons.

- **Background Color** and **Icon Color**: You should primarily set colors through Theme colors in Omnia Admin (System/Settings/Default colors). If you still would like custom colors for the header, you can set background color and icon color here.
- **Enable Legacy Header**: The new standard Omnia header is rather slim. If you would like the former Omnia default header, which is for example slightly higher, select this option. The option is valid for all headings in this Omnia Profile (not just the site).

For more information on the Cross Sites Mega Menu, see: The Cross Sites Mega Menu

1.2.6 Quick Search and Advanced Search

Setup Enterprise Search Center

Follow these steps to configure Quick Search and the Enterprise Search Center.

1. Go to the Enterprise Search Center set up by default in the tenant, usually located at <https://mytenant.sharepoint.com/search>
2. Go to Omnia Admin > Features via Site Contents.
3. Activate the following site collection scoped features:
 - Omnia Core Master Page
 - Omnia Intranet Search Center Fixup
4. Go to the start page of the Enterprise Search Center.

5. Open the Quick Search settings.



6. Make sure that the Default Result Page and People Result Page match the setup of the Enterprise Search Center.

Quick Search Settings ×

Default Result Page

/search/pages/results.aspx

All result source ID

Delve Site Url

People Result Page

/search/Pages/peopleresults.aspx

People result source ID

Row Limit

10

SAVE CANCEL

Setup Delve People Search

Follow these steps if you want to connect the People advanced search to Delve.

1. Browse to Delve.
2. Copy the Delve url (example: <https://eur.delve.office.com/>).
3. Open the Quick Search settings and set the Delve Site url.

Setup Result Source

A custom result source can be used for the “All” and “People” scopes respectively. Follow these steps to setup a custom result source.

1. Go to SharePoint Admin Center > Search > Manage Result Sources.

2. Create a new Result Source.

General Information

Names must be unique at each administrative level. For example, two result sources in a site cannot share a name, but one in a site and one provided by the site collection can.

Descriptions are shown as tooltips when selecting result sources in other configuration pages.

Name

People in Retail

Description

This result source will only display people in the department "Retail".

Protocol

Select Local SharePoint for results from the index of this Search Service.

- ☒ Local SharePoint
- ☐ Remote SharePoint
- ☐ OpenSearch 1.0/1.1
- ☐ Exchange

Type

Select SharePoint Search Results to search over the entire index.

- ☐ SharePoint Search Results
- ☒ People Search Results

Query Transform

Change incoming queries to use this new query text instead. Include the incoming query in the new text by using the query variable "{searchTerms}".

{searchTerms} Department="Retail"

Launch Query Builder

[Learn more about query transforms.](#)

3. Edit the newly created result source.
4. Copy the unique sourceid from the url to the clipboard.

s/15/EditResultSource.aspx?level=tenant&sourceid=fd81c8c2-9fe7-4c90-96b6-b0d3e7c56649

5. Open the Quick Search settings and set the related result source ID.

×

Quick Search Settings

General

Custom Colors

Default Result Page

/search/pages/results.aspx

"All" result source ID

People Result Page

/search/Pages/peoplereults.aspx

"People" result source ID

fd81c8c2-9fe7-4c90-96b6-b0d3e7c56649

Row Limit

10

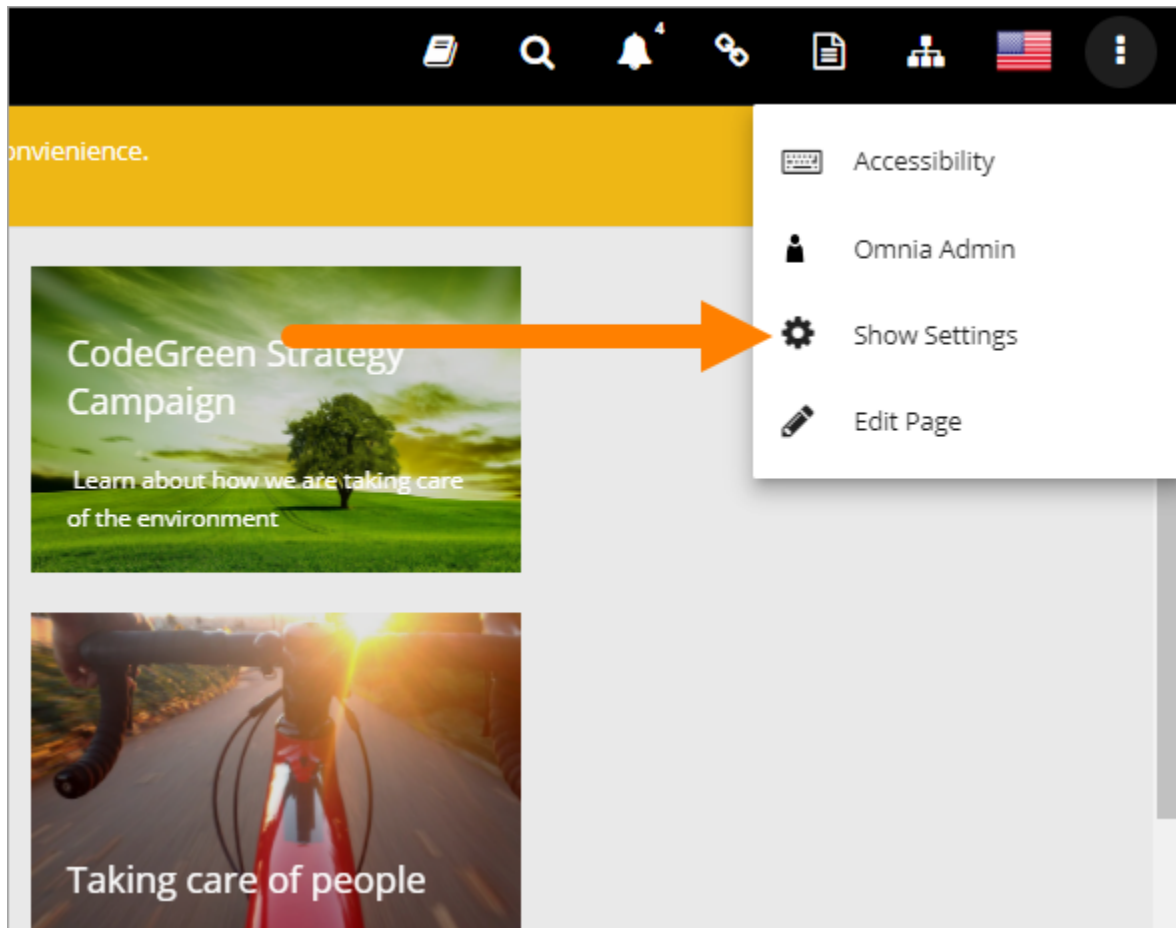
Save

Close

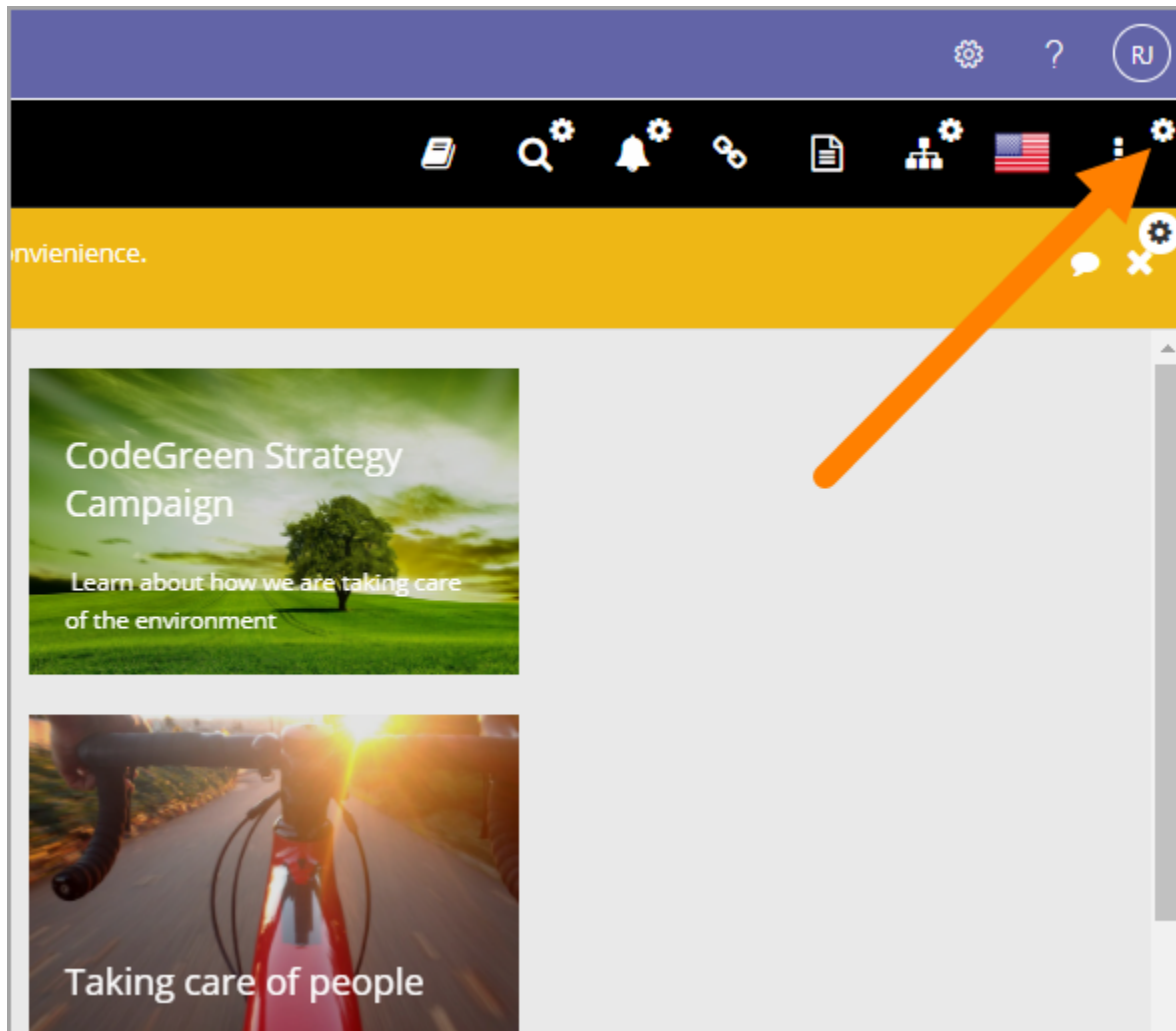
Activate Modern Search

To be able to use modern search it must first be activated. Do the following:

1. Show settings.



2. Open the Header settings.



3. Select "ENABLE FEATURES".

Header Settings

GENERAL

ENABLE FEATURES

Background Color

#000000

X ▾

Icon color

#FEFEFE

X ▾

☐ Enable Legacy Header

SAVE

CANCEL

4. Select “Enable Modern Search”.

Header Settings

GENERAL ENABLE FEATURES

☒

 Enable Global Language Picker

☒

 Enable Header Notification Panel

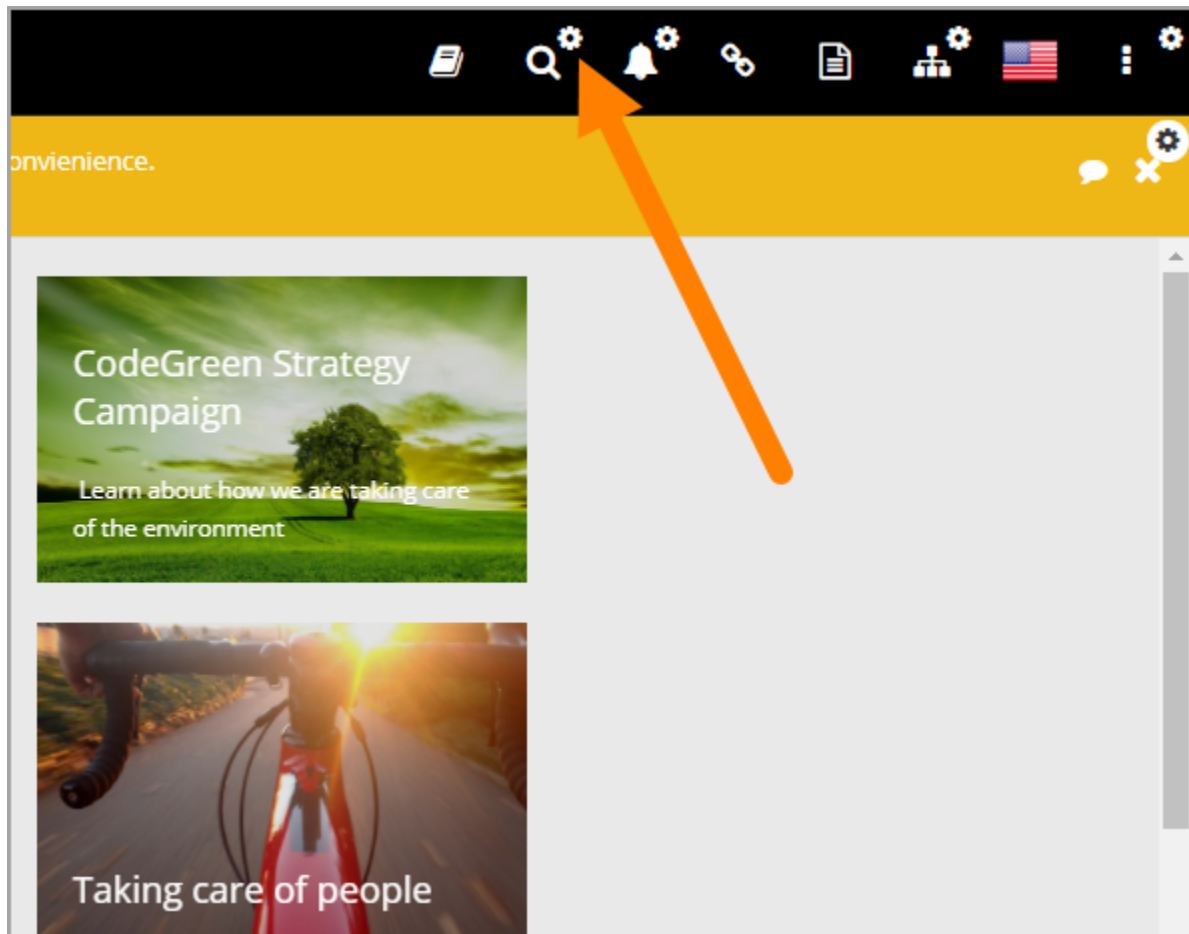
☐

 Enable Modern Search

1.2. My Workplace

SAVE CANCEL

You can now edit the settings for search:



These settings are available:







Search

SEARCH CONFIG

QUICK SEARCH

ADVANCED SEARCH

Search Categories

Title	Search Query	
Document		 
People		 
Pages		 

Search Templates

Title	Id	Default
Omnia Page Search Template	771a1862-db8f-40d2-83d7-60c5f223a0b4	<input type="radio"/>
Sharepoint Page Search Template	ef2c2604-6b0c-4753-9b04-4ba1811530c4	<input type="radio"/>
Document search template	19279996-4e2e-4802-8e45-e87b73ca5c6e	<input type="radio"/>
Person Search Template	07019810-ad30-4ecb-b577-200c0bfaaa5e	<input type="radio"/>
Default search template	b08d26ab-540b-4b57-b559-85427f487da1	<input checked="" type="radio"/>

1.2. My Workplace

SAVE

CANCEL

See this page for a detailed description of the settings: [*Quick Search and Advanced Search*](#)

The Quick Search control makes it possible for the end user to search for content and people in the tenant without going to the Enterprise Search Center. The Quick Search is shown across all SharePoint sites in Omnia.


The Quick Search settings are master page scoped. All sites using this master page will inherit the settings.


A search result are divided into results for Documents, People, and Pages. Here's an example:


Quick Search


office


Document

 Demo Doc JB 1


 Demo Doc JB 1


 How to drill down


 How to drill down


 Manual for TX100

People

 **Robert Johnson**
0771-44 00 80
HR

 **Anna Karlsson**
012-345678
Marketing

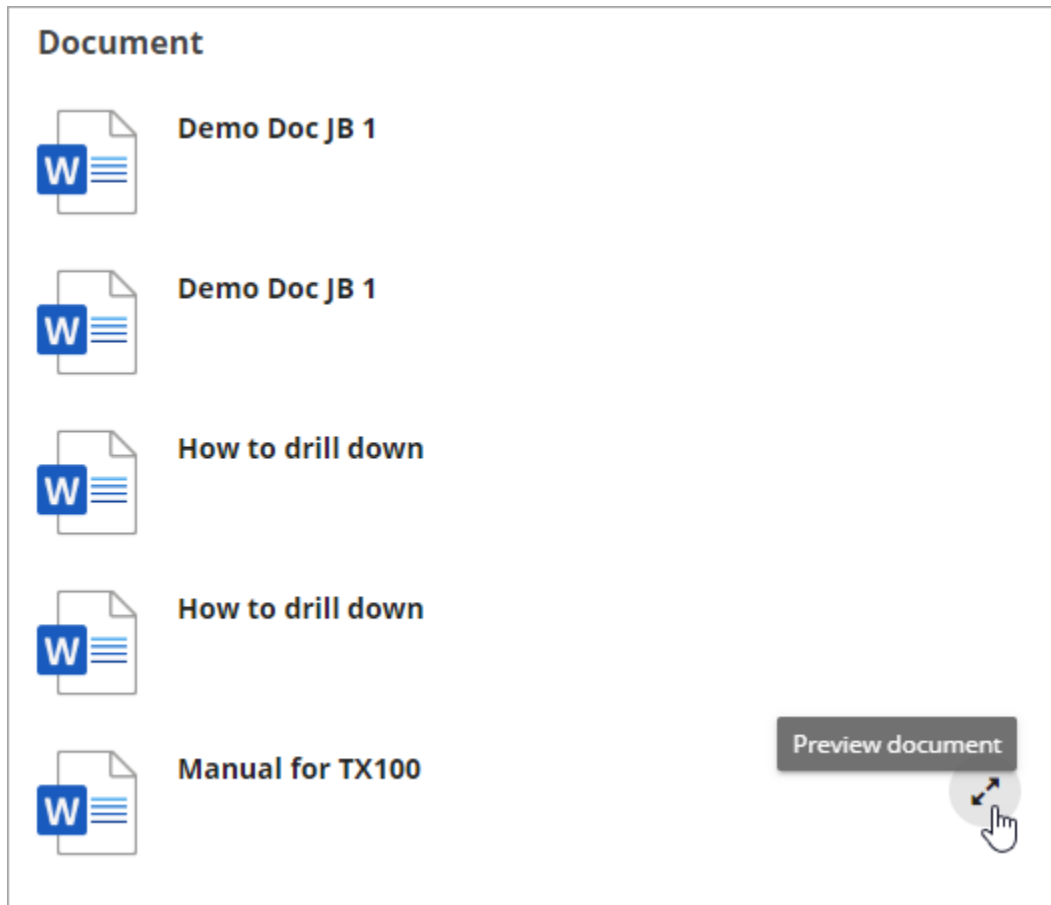
 **Angela Schultz**
Marketing

 **Andreas Meyer**

1.2: My Workplace


See more results for "office"

A document can be previewed before it's opened. Point at the document and a preview icon is shown.




Click the icon to display the preview. Here's a very simple example:


Document




Demo Doc JB 1




Demo Doc JB 1




How to drill down



How to drill down



Manual for TX100



Manual for TX100		Type	Doc. ID
		Work instruction	ADN-671
Approved	Owner	Revision date	Edition
2020-06-18 by Robert Johnson	Robert Johnson	2021-06-30	2

This is a manual

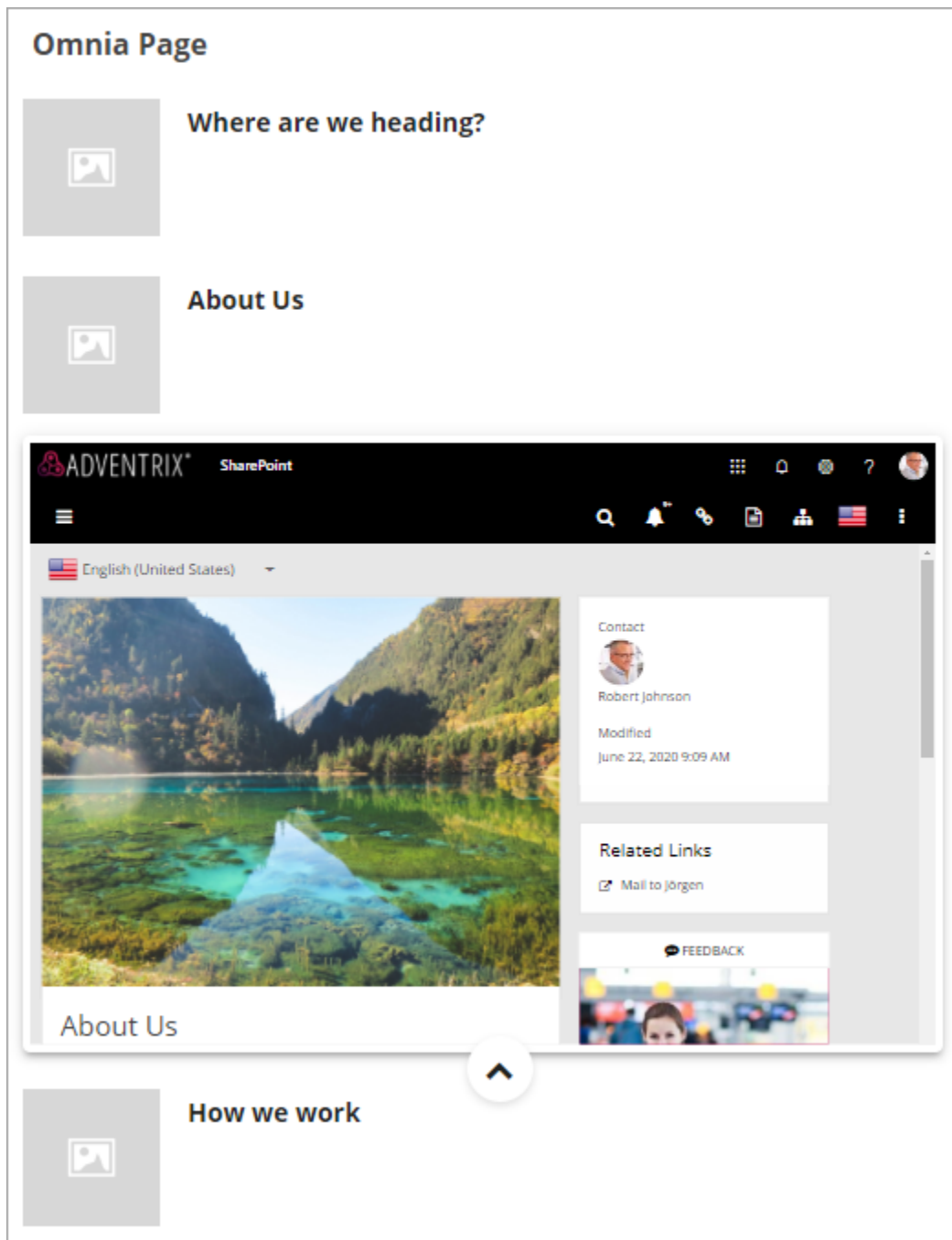
Writing some content here.

This is a manual about our new system TX-100. The TX100 is a new system that will be used for our internal revisions


For People search results, the name can be clicked to display the person's Delve page.

Pages can also be previewed. A preview icon can be displayed the same way as for documents.


Here's an example of a page preview:





Users can click a link to go to Advanced search (what the link actually is called can be set).


**Manual for TX100**

People

**Robert Johnson**
0771-44 00 80
HR

**Anna Karlsson**
012-345678
Marketing

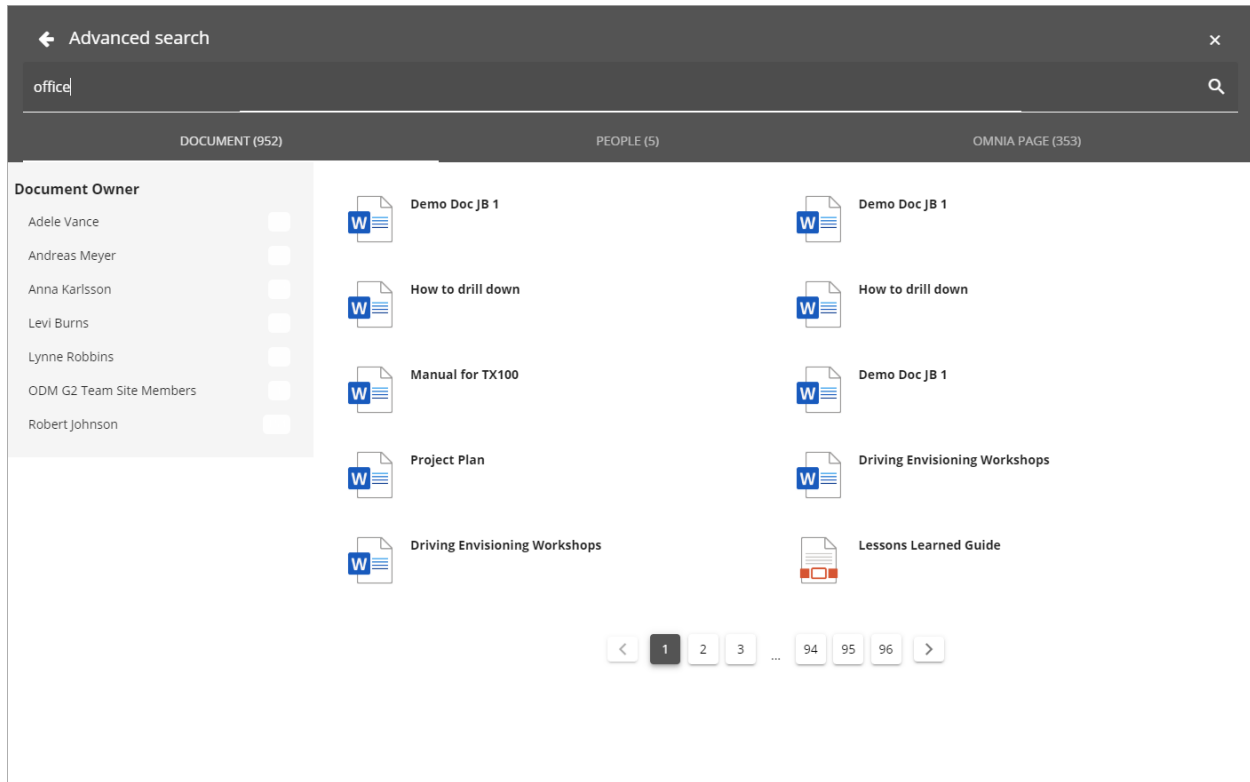
**Angela Schultz**
Marketing

**Andreas Meyer**

See more results for "office"

The advanced search result is shown in a flyout, meaning the user will still be on the page where the quick search was conducted.

Here's an advanced search example:



The search result is now divided into a number of tabs (categories) as set up in the settings (see below). Refiners can also be available, if set up (see below).

Settings for the control

To make these settings available, you must first activate modern search, see: [Modern Search](#)

When Modern Search has been activated, the following settings are available:

Search







×

SEARCH CONFIG

QUICK SEARCH

ADVANCED SEARCH

Search Categories

Title	Search Query	+
Document		 
People		 
Omnia Page		 

Search Templates

Title	Id	Default
Omnia Page Search Template	771a1862-db8f-40d2-83d7-60c5f223a0b4	<input type="radio"/>
Person Search Template	07019810-ad30-4ecb-b577-200c0bfaaa5e	<input type="radio"/>
Document search template	19279996-4e2e-4802-8e45-e87b73ca5c6e	<input type="radio"/>
Sharepoint Page Search Template	ef2c2604-6b0c-4753-9b04-4ba1811530c4	<input type="radio"/>
Default search template	b08d26ab-540b-4b57-b559-85427f487da1	<input type="radio"/>

SAVE

CANCEL

The Search Config tab

The following can be set here:

- **Search Categories:** Available search categories are listed. You can edit or delete them using the icons. New search categories can be created, see below. Search categories are used to divide the Quick search result and to be displayed as tabs in the Advanced search.
- **Search Templates:** Search Templates are created by developers and are simply listed here. A Search Template defines how to display a search result. If a search result happens to not match any Search Template, the Default search template is used. You can set Default search template by clicking any of the templates in the list.

Create a new Search category

To create a new search category, click the plus.







Search

SEARCH CONFIG

QUICK SEARCH

ADVANCED SEARCH

Search Categories

Title	Search Query	
Document		 
People		 
Omnia Page		 



Search Templates

Title	Id	Default
Omnia Page Search Template	771a1862-db8f-40d2-83d7-60c5f223a0b4	<input type="radio"/>
Person Search Template	07019810-ad30-4ecb-b577-200c0bfaaa5e	<input type="radio"/>
Document search template	19279996-4e2e-4802-8e45-e87b73ca5c6e	<input type="radio"/>
Sharepoint Page Search Template	ef2c2604-6b0c-4753-9b04-4ba1811530c4	<input type="radio"/>
Default search template	b08d26ab-540b-4b57-b559-85427f487da1	<input type="radio"/>

SAVE

CANCEL

Use these settings to create the category:

 Create 

Title

Search Result Source

Search Query

☐ Support WildCard Character

Search Templates

SAVE

CANCEL

- **Title:** Add a title for the Search Category.
- **Search Result Source:** Select Source from the list.
- **Search Query:** Add the Search Query here.
- **Support WildCard Character:** To be able to use a wildcard character in the query, this option must be selected.
- **Search Templates:** Select one or more Search Templates from the list.

The Quick Search tab

You can set the following on this tab:

Search

×

SEARCH CONFIG

QUICK SEARCH

ADVANCED SEARCH

Search Categories

Document

People

Omnia Page

▼

Title	Row Limit
<div>≡ Document</div>	5
<div>≡ People</div>	5
<div>≡ Omnia Page</div>	5

SAVE

CANCEL

- **Search Categories:** The selected search categories for Quick search are listed. You can add or remove categories using the list to the right.
- **Title/Row limit:** For each selected search category you can set the number of search results to be shown. **Important note!** This setting is valid for Quick search only. When a user chooses to display the Advanced search, all search results are shown there per category.

The Advanced Search tab

Here you handle settings for Advanced search:

Search

SEARCH CONFIG

QUICK SEARCH

ADVANCED SEARCH

☐ Use SharePoint Search Center

Refiner Position
Left

Search Categories
Document People Omnia Page



Title	Item Per Page	Refiners	
Document	10	1	
People	10	1	
Omnia Page	10	1	

SAVE

CANCEL


- **Use Sharepoint Search Center:** If you want to use a Sharepoint Search Center instead, select this option.
- **Sharepoint Search Center Url:** To be able to use a Sharepoint Search Center, you must add the Url here.
- **Refiner position:** Refiners can be shown to the left or to the right. Default setting is left. Note that for any refiners to be shown you must add refiners, see below.
- **Search Categories:** The selected search categories for Advanced search are listed. You can add or remove categories using the list to the right.
- **Title, Item Per Page, Refiners:** Existing settings for search categories are shown here. To edit the settings, click the pen.




The following settings are available for a search category (valid for Advanced search only):

 Edit Advanced Search Category Config 

Document

Row Limit
10

Refiners 

Title	Order By	Refiner Limit
 Document Owner	Alphabetic 	10 

SAVE CANCEL

- **Row Limit:** Set the number of search hits to be displayed on each “page”. When more results are available, a navigation is shown at the bottom of the tab. See below for an example.
- **Refiners** Refiners can be used by users to shorten a long search result. Available refiners (if any) are shown below. You can remove a refiner by clicking the dust bin. You can also add new refiners.

To add a new refiner, do the following:

1. Click the plus.

← Edit Advanced Search Category Config

×

Document

Row Limit

10

Refiners

+

Title

Order By

Refiner Limit

≡ Document Owner

Alphabetic ▾

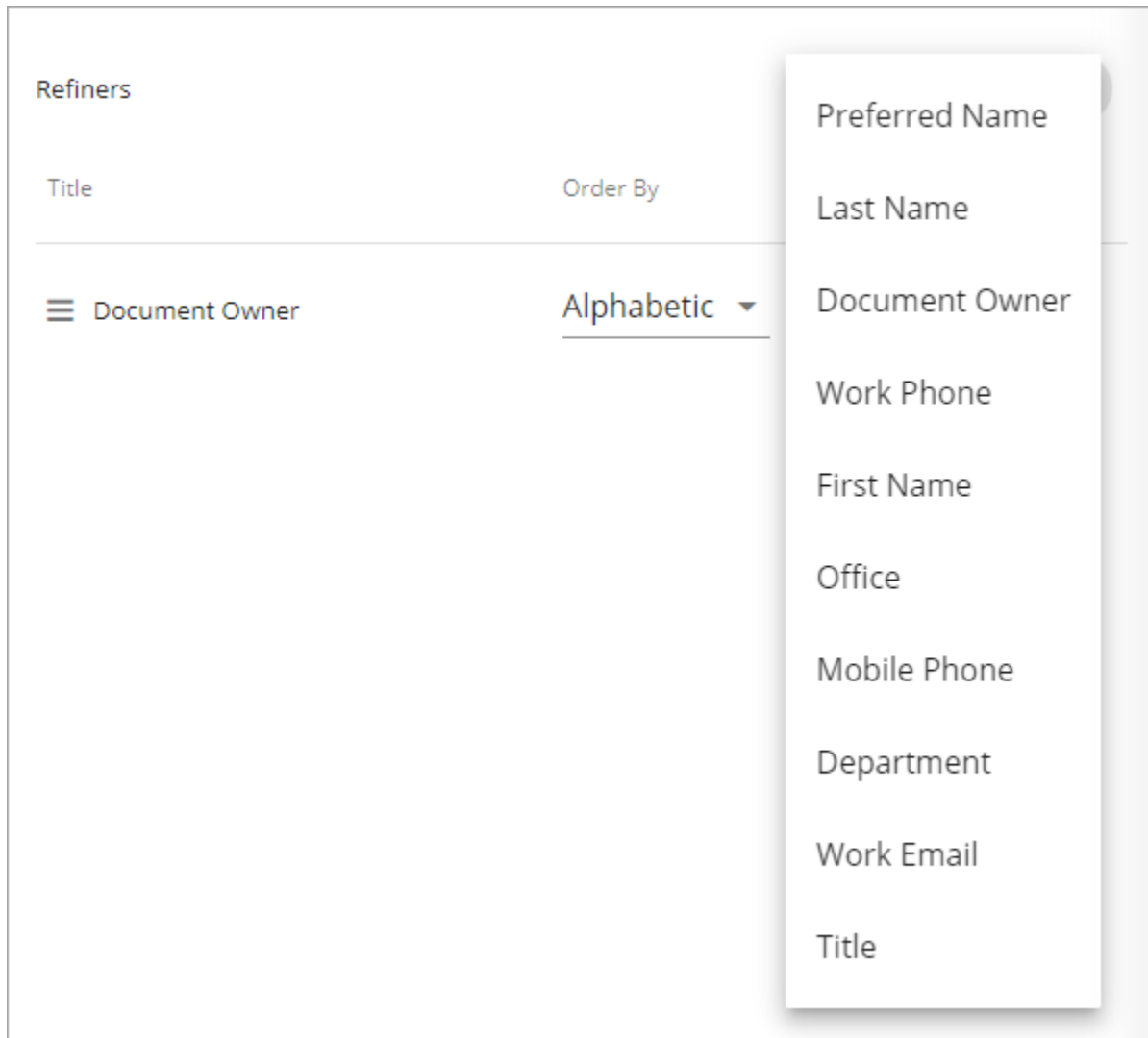
10

🗑

SAVE

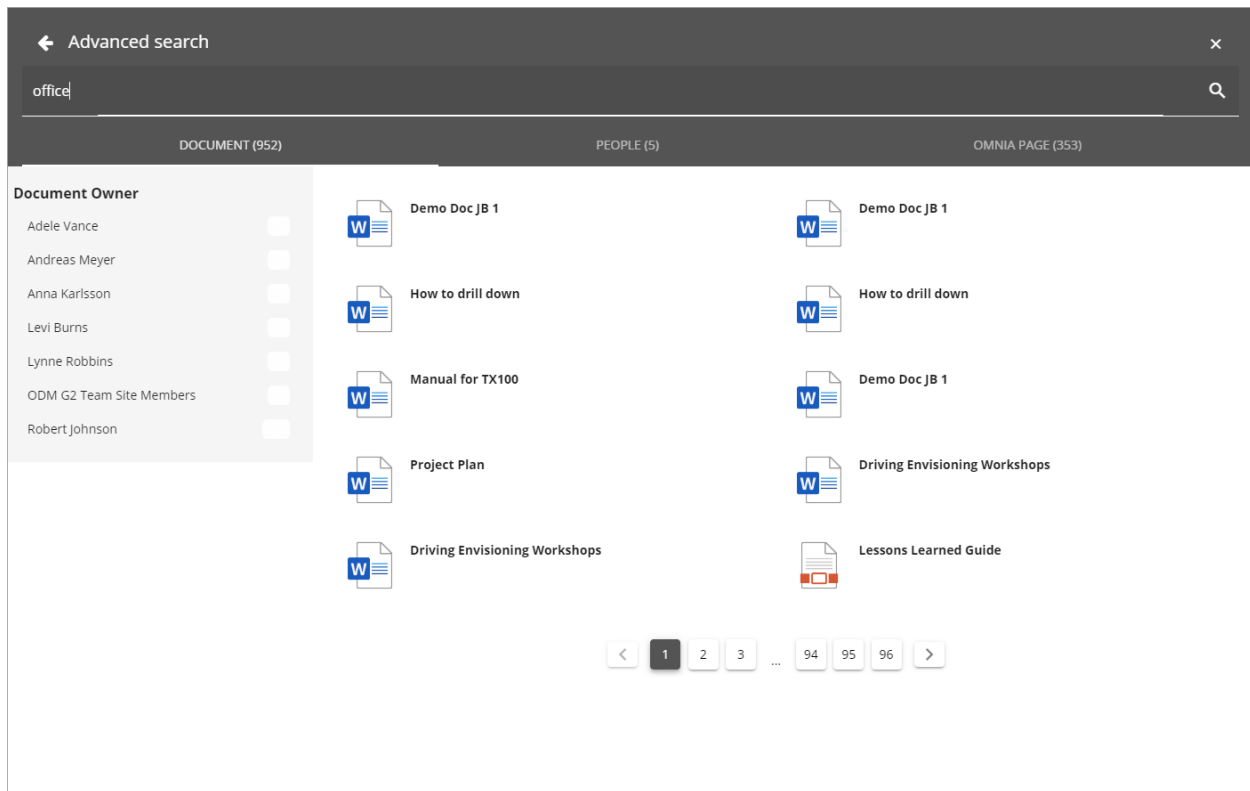
CANCEL

2. Select a property to be used as a refiner.



3. Set the sorting for the refiners (Order By). You can use Alphabetic or Count. When using Count, the refiner with the most search hits is shown at the top.
4. Set Refiner Limit. This is the number of refiners that will be shown. If you for example select Document Owner as and refiner, and set the Refiner Limit to 10, only ten of the document owners will be listed.
5. Click Save.
6. Click Save on the main settings page as well (very important, or your changes may not be saved!)






Here's an example of an Advanced search flyout with Document Owner as refiner at the left. Also note the navigation at the bottom.



As you can see, only 7 document owners are listed, simply because there are only 7 document owners in our demo system!

1.2.7 My Recent Documents

You can use the My Recent Documents control on any publishing page. The control displays a list of all documents the logged in user recently has edited. Here's an example:

My Recent Documents		
	Speaker Inspiration Marketing Forum 2019	14 days ago
	Marketing Automation Analytics Marketing Forum 2019	17 days ago
	Keynote Guidelines to Speakers Marketing Forum 2019	17 days ago
	Marketing Targets 2019 Marketing Forum 2019	17 days ago
	Partner Conference Summary Marketing Forum 2019	17 days ago

My Recent Documents is available as a block for Quick Pages and as a web part.

Settings for the control

The following settings are available:

My Recent Documents Settings

GENERAL

CUSTOM COLORS

Title

Row Limit

5

Day Limit

-1

View

List

Icon

Image

☐ Open in Client App

Visible

Always

SAVE

CANCEL

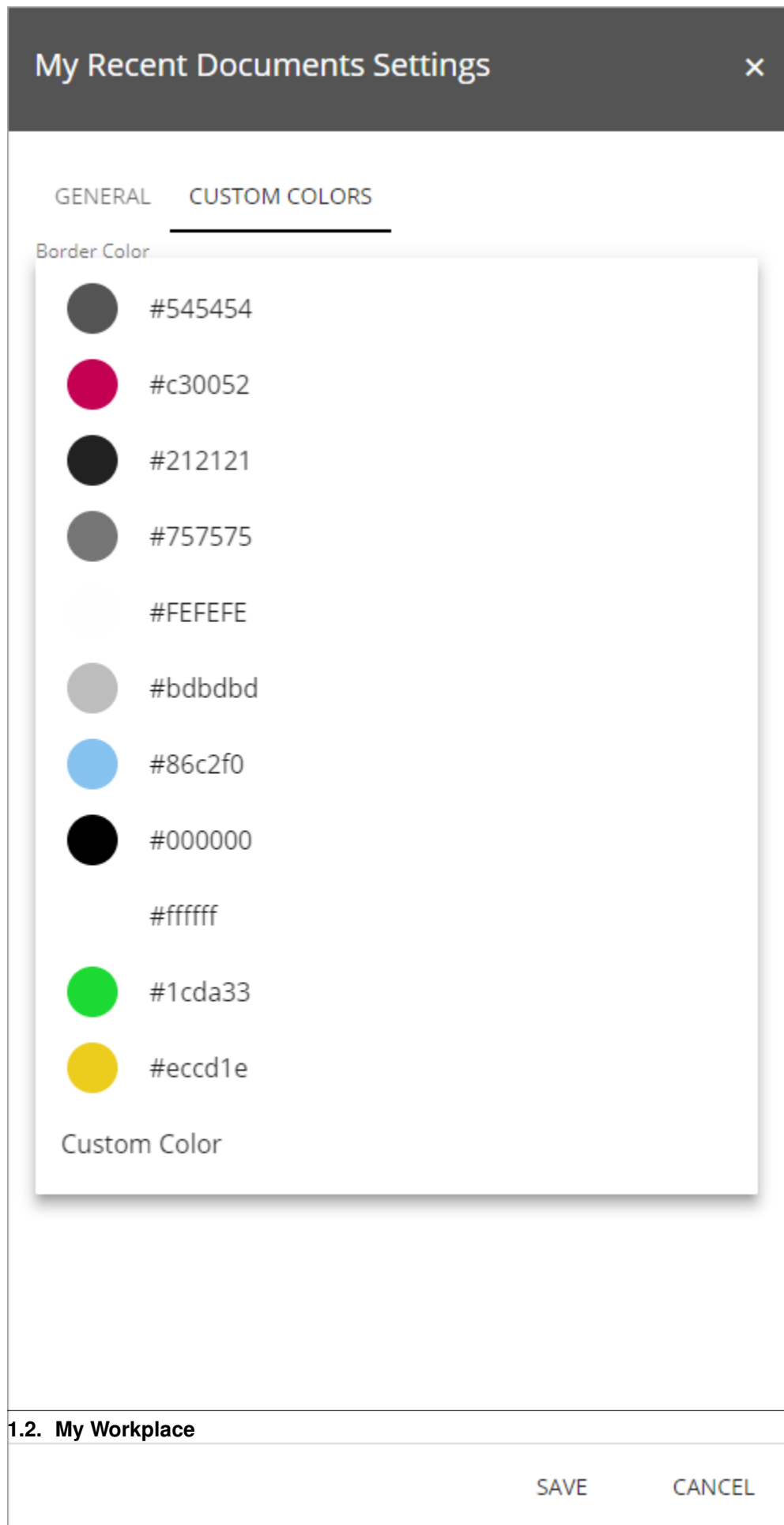
The General tab

On this tab you can set the following:

- **Title:** Enter the title to be displayed for the control.
- **Row limit:** Enter number of rows for each “page” in the list.
- **Day limit:** Select how far back “recent” should be.
- **View:** Select a simple listing in time order or Grouped by site.
- **Icon:** Select how to display the icons for the document type, Sketched (black and white) or Image (color).
- **Open in Client App:** If you would like the document to always be opened in the full version of the application (the version installed on the computer, not the online version), check this box.
- **Visible:** Set when the control will be visible; always, within a maximum width or within a minimum width.

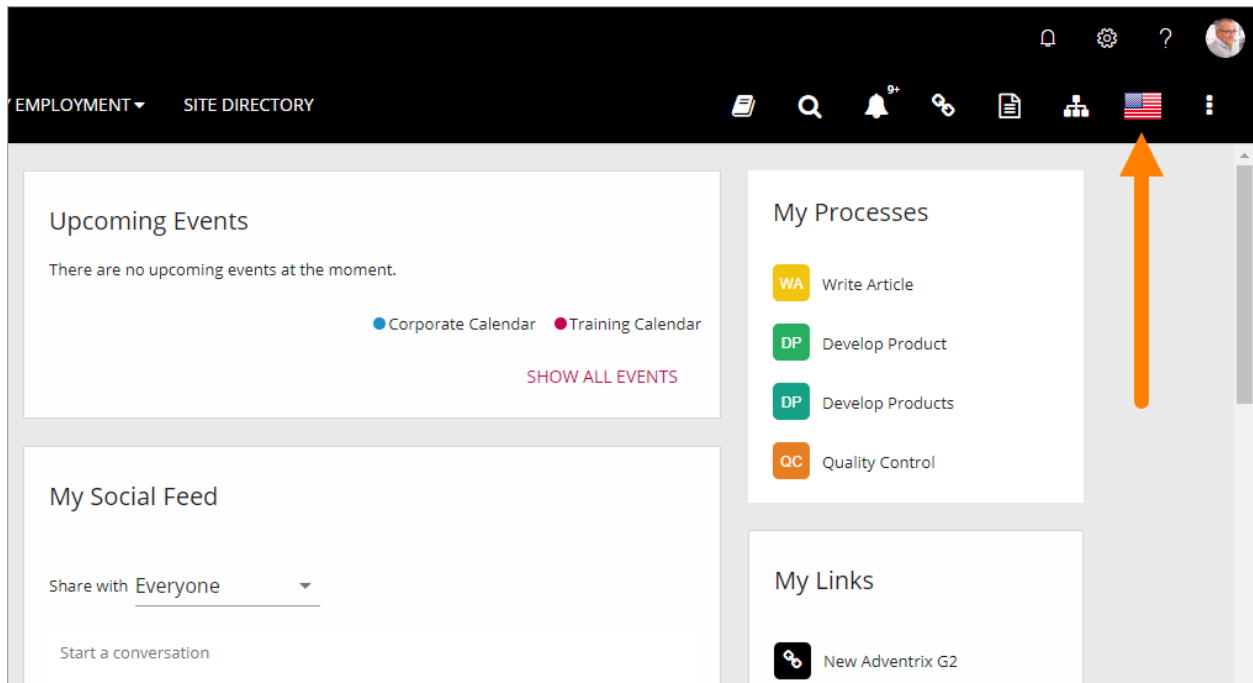
The Custom Colors tab

You should primarily set colors through Theme colors in Omnia Admin (System/Settings/Default colors). If you still would like custom colors for the control’s border, you can set them using this tab. (The list is opened in the image.)

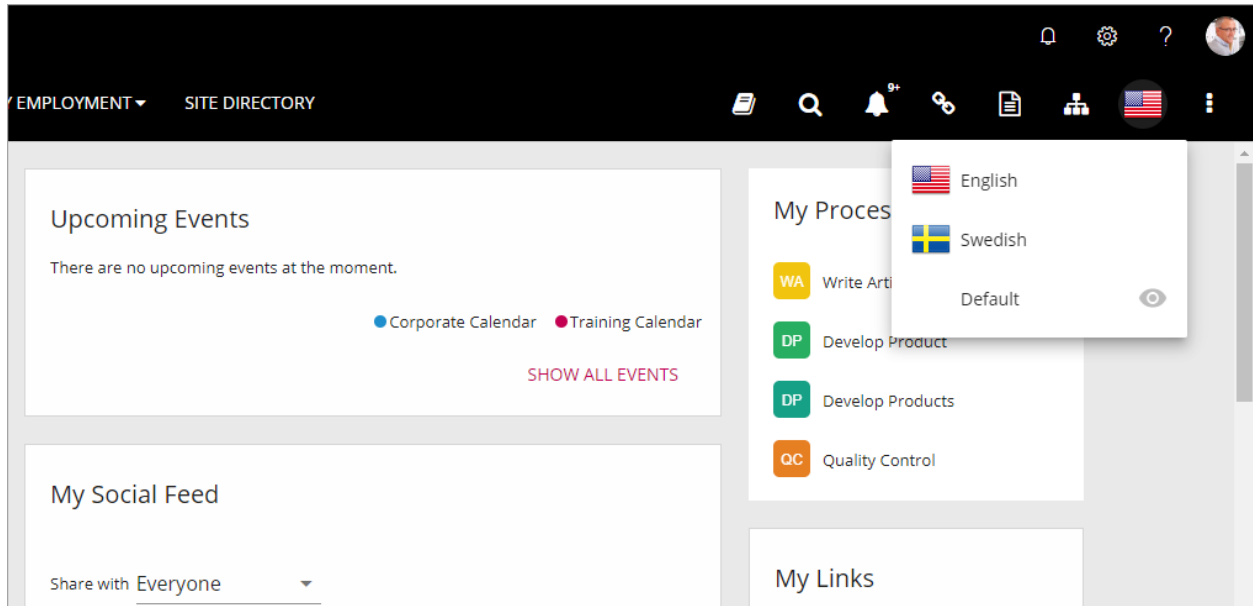


1.2.8 Select language

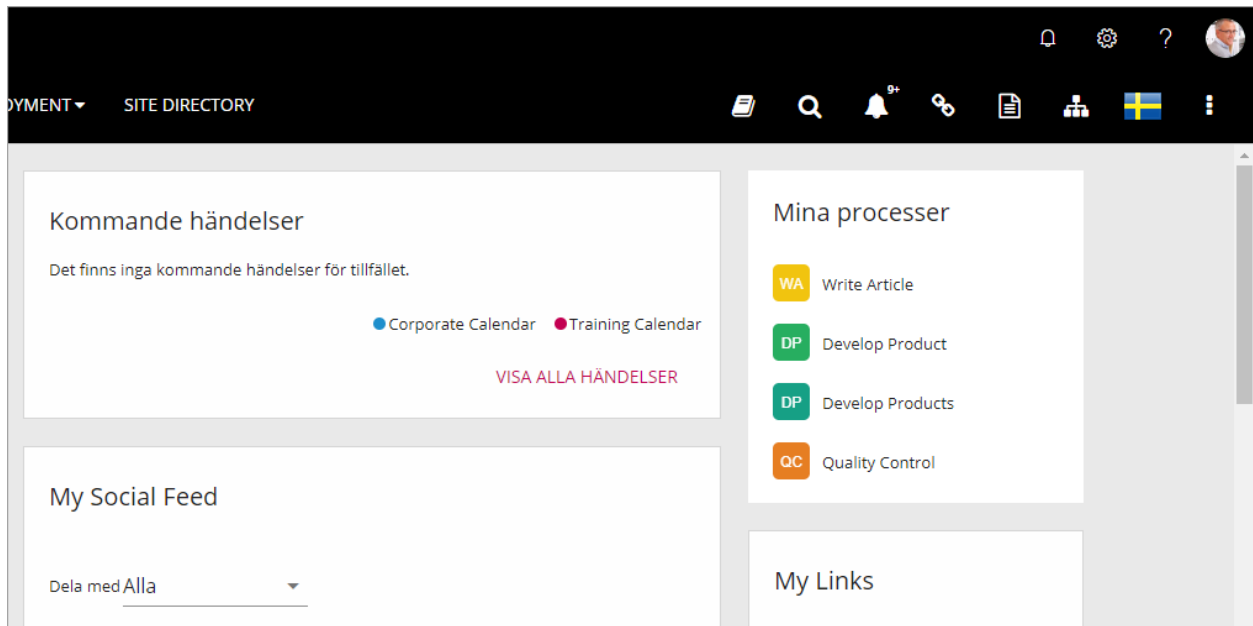
Users can select language for page content, current menu and mega menu here:



Available languages are shown, for example:



If another language is selected, the flag changes to indicate that.



Default language can also be chosen, and that is the language that is defined for the user in Sharepoint.

1.3 Team Collaboration

1.3.1 Create Site

The Create Site function is accessible via the My Sites navigation control.

My Sites ×

FOLLOWING LAST VISITED MEMBER OF ALL

Filter ▼

AT

Adventrix Travel Intranet

★

A3

ADX 300

★

BC

Barcelona Conference 2018

★

BF

Bikes Forum 2019 Berlin

★

FF

Författarwebbplats för säljmaterial

★

GM

Global Marketing

★

GR

Global R & D

★

ID

IT Department

★

MF

Marketing Forum 2019

★

PP

Partner Portal

★

PT

ProDev Team

★

PA

Project Altair

★

PG

Project Galaxy

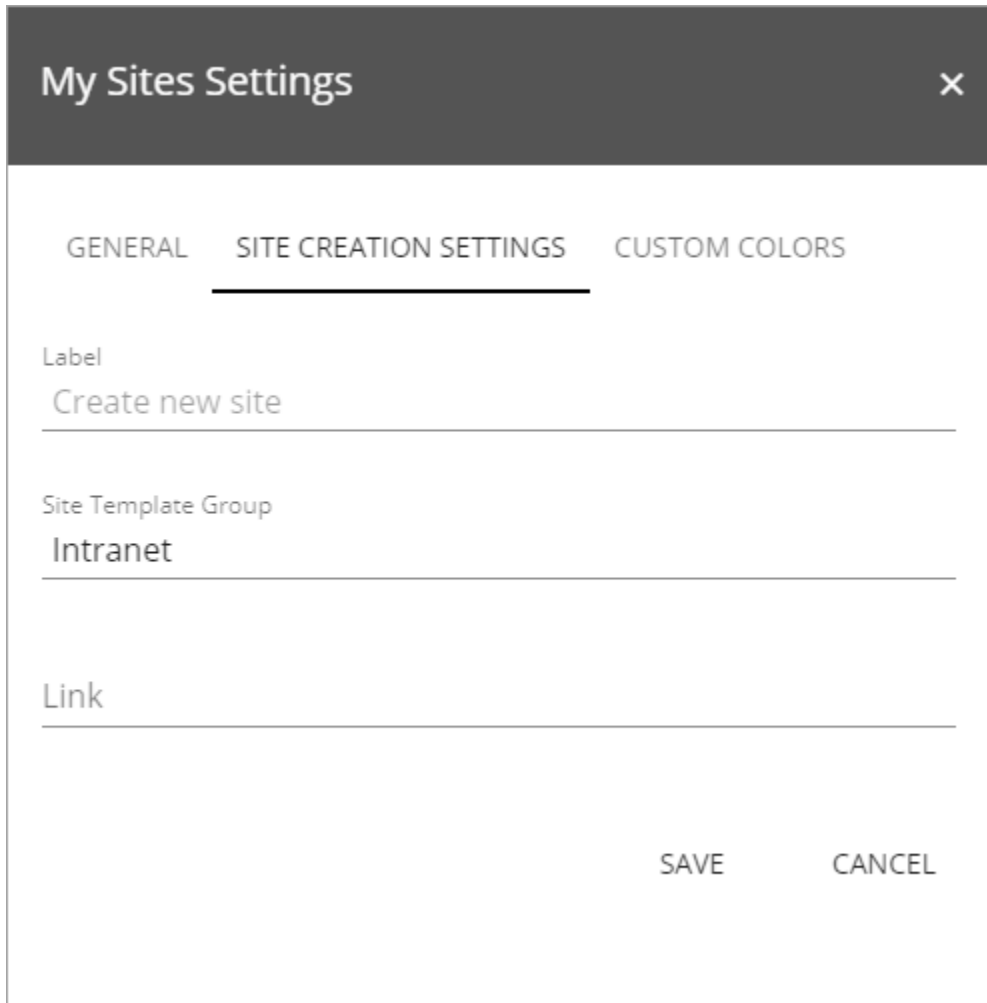
★

70

Chapter 1. Topics

CREATE NEW SITE

The Create Site function relies on a number of different parts of Omnia. In the My Sites navigation control there are settings for the Create Site form.



The screenshot shows a modal dialog titled "My Sites Settings" with a close button (X) in the top right corner. The dialog has three tabs: "GENERAL", "SITE CREATION SETTINGS" (which is selected and underlined), and "CUSTOM COLORS". Under the "SITE CREATION SETTINGS" tab, there are three input fields: "Label" with the text "Create new site", "Site Template Group" with the text "Intranet", and "Link". At the bottom right of the dialog, there are two buttons: "SAVE" and "CANCEL".

See this page for more information about these settings: [My Site](#)

An important aspect of the create site process is whether the user should be able to create the site with approval or not. That is set per site template, in the Omnia Admin settings.

☒ Site Collection ☐ Sub Site ☐ Office 365 Group

General

Settings

Features

Properties

Permission Level

☒ Self Service
☐ Approval

Template Group

Display To

Default Administrator

Default Secondary Administrator

Default Visitors

Storage Quota (GBs)

Default Time Zone

(UTC+01:00) Amsterdam, Berlin, Bern, Rome, Stockholm, Vienna ▼

User can select language

☐

User can select Omnia Profile

☐

Send access request to

☒ Primary site collection owner
☐ User who requested site
☐ Email

See this page for more information: [Site templates](#)

In the Create Site process, the following are Omnia additions:

The site creation process is fully compliant with Microsoft 365 Group Naming Policies. When a user enters a site name in the first step a check will be performed against the policies and if the name is not allowed it's not possible to create the site. It can look like this:

← Create Site

×

✓ Templates

2 Information

Title*

HR Group

Site name cannot contain the blocked word "HR" as per company policy

Group email address

hrgroup

Description

Privacy

Private - Only approved members can see what's inside

Time zone

(UTC+01:00) Amsterdam, Berlin, Bern, Rome, Stockholm, Vienna

☒ Make Public in Site Directory

The user has to type another name that is allowed, and when it is, the message can look like this:

← Create Site

×

✓ Templates

2 Information

3 Properties

Title*

Project Alpha

Retail - Project Alpha (United States)

✓ The site name is available

Group email address

projectalpha

Retail-projectalphaUnitedStates

✓ The group alias is available

Url

/sites/Retail-projectalphaUnitedStates

Description

Privacy

Private - Only approved members can see what's inside

Time zone

(UTC+01:00) Amsterdam, Berlin, Bern, Rome, Stockholm, Vienna

✓ Make Public in Site Directory

The first step also includes a setting for the control Site Directory, if that is used. The option means a user can find the site in Site Directory, even without having access to it, and can see that it exists and can request access to the site. “Make Public in Site Directory” is selected as default.

← Create Site

×

✓ Templates

2 Information

3 Users

Title*

Description

Url

/sites/

Language

English (United States)

▼

Time zone

(UTC+01:00) Amsterdam, Berlin, Bern, Rome, Stockholm, Vienna

▼

☒ Make Public in Site Directory

For some types of sites, most often for project sites, there can be an Omnia specific step for the user to set properties. Here's an example:

← Create Site

×

✓ Templates

✓ Information

3 Properties

Project Manager*

*

Organisation

Archived

Project sponsor*

Properties for this step is set in the site template. See the heading “The Properties tab” on this page for more information: [Site templates](#)

1.3.2 My Tasks

The My Tasks control aggregates all tasks that have been assigned to the current user.

Note! The My Tasks control is based on the search engine in SharePoint. It may take several minutes before a task assigned to the current user in a team site is shown on the start page.

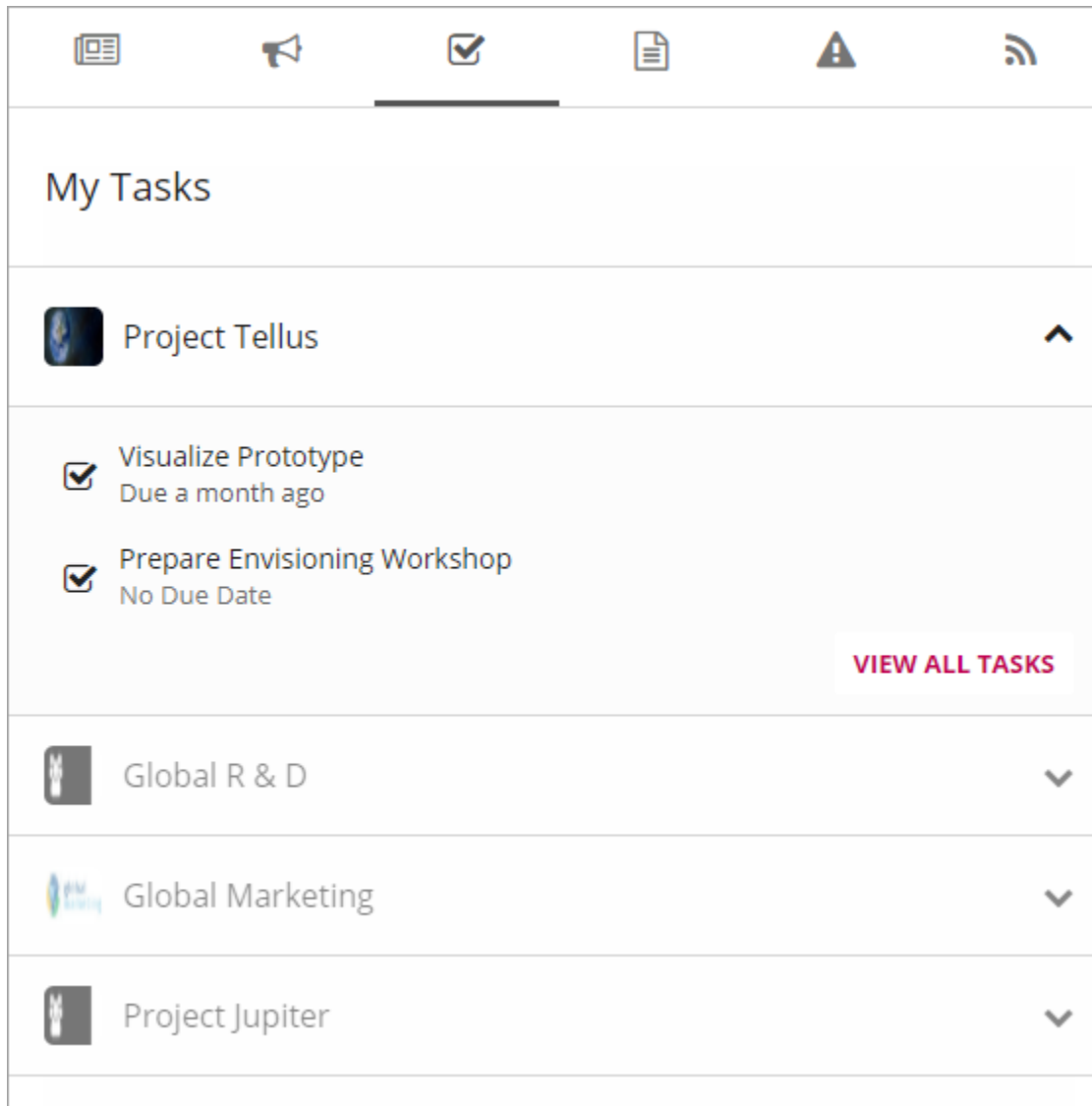
(The My Tasks control also supports aggregation of Tasks from Planner in Microsoft 365. This feature requires some additional configuration in the tenant. Please consult your local Omnia contact.)

All sites with tasks assigned to the user is displayed in a list, with the number of tasks assigned in each site.

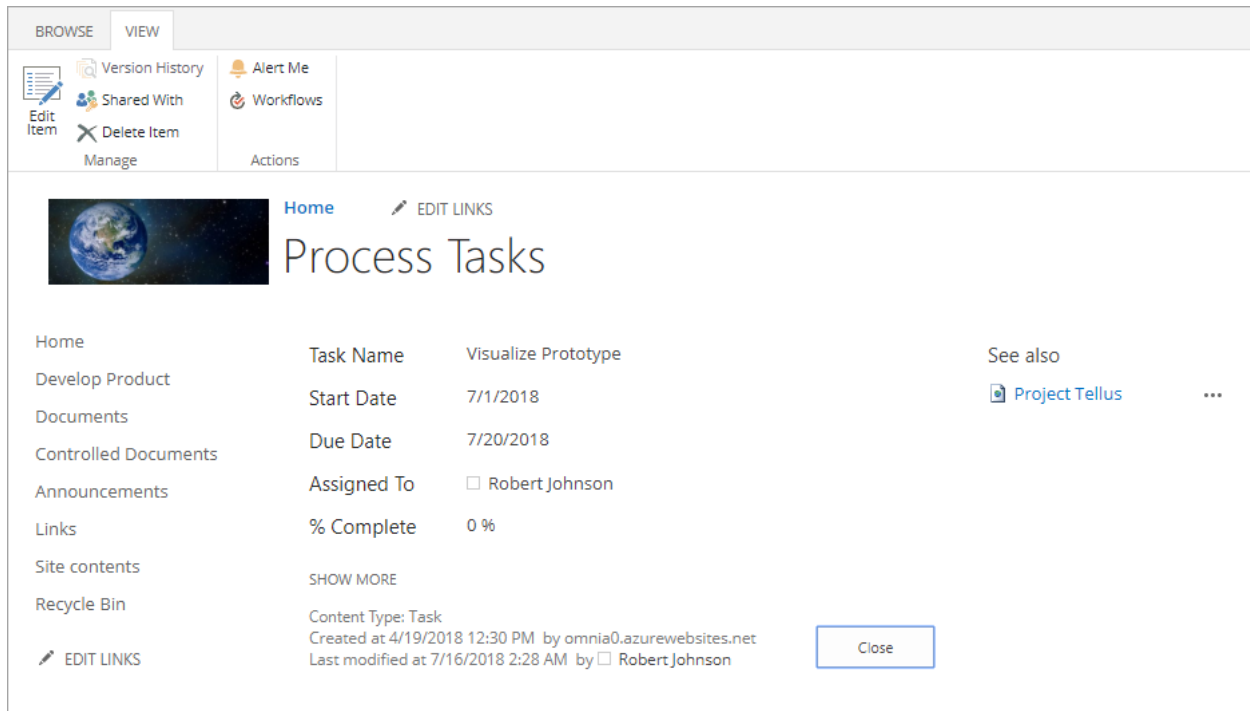
The My tasks list is often part of the Notification panel but can also be added as a separate control, as a web part on a legacy page, or a block on a Quick Page.

My Tasks list in Notification panel

Here’s an example of a My Tasks list in the Notification Panel:



The user can click on a task to get more information, for example:








Settings for the control are in this case handled in the Notification Panel, see [Notification Panel](#)

My Tasks as a separate control

You can place the My Tasks control as a web part on any legacy page, or as a block on a Quick Page.

Here's an example when My Tasks is used on a Quick Page:

My Tasks		
	Project Beta (2)	▼
	QESH Team (1)	▼
	Project Delta (1)	▲
<hr/>		
	Approve document: Project-Delta-Project-Plan.docx Due 9 days ago	
		VIEW ALL TASKS
	Global Marketing (3)	▼

Settings for the control

The following settings are available:

My Tasks Settings



GENERAL

CUSTOM COLORS

PLANNER TASKS

Title

Row Limit

100

Day Limit

0

☐ Always Show Letter Avatar

- **Row Limit:** The maximum number of tasks to show in the list.
- **Day Limit:** How many days forward in time to show assigned tasks. 0 = no limit.
- **Always Show Letter Avatar:** If a letter avatar should always be shown instead of site image.
- **Custom colors:** You should primarily set colors through Theme colors in Omnia Admin (System/Settings/Default colors). If you still would like custom colors for the control, you can set them using this tab.

My Tasks Settings

GENERAL

CUSTOM COLORS

PLANNER TASKS

Accordion Icon Color

Accordion Background Color

Accordion Text Color

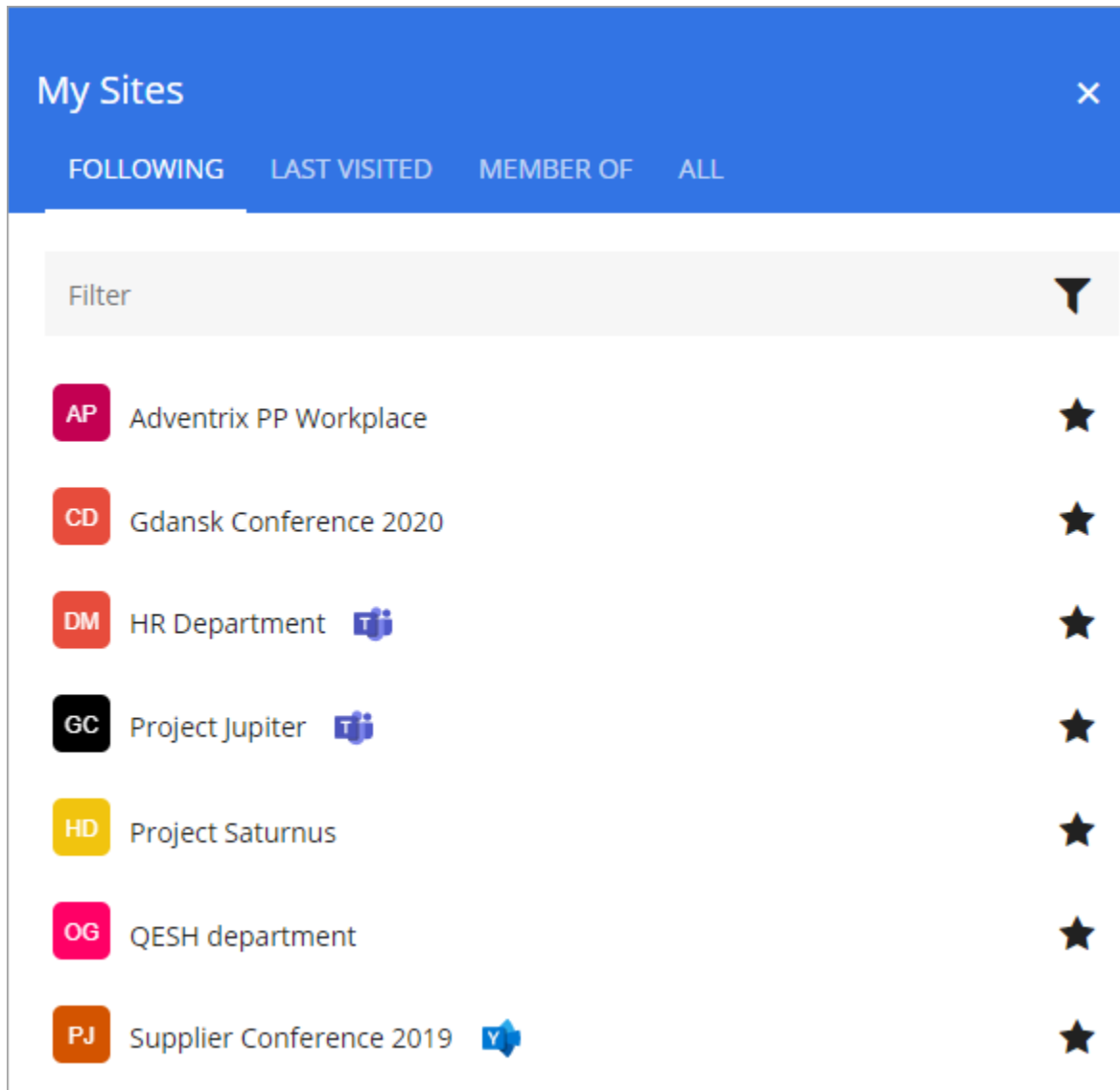
Overdue Color

Border Color

- **Planner Tasks:** This option is only available if Azure AD Services has been enabled. Check the box “Enable Planner Tasks” to include tasks from planner in the My Tasks rollup.

1.3.3 My Sites

The My Sites control makes it possible for an end user to navigate to all sites that the user has access to.



Four tabs can be configured in the control:

- **FOLLOWING:** Lists all sites that the user is following.
- **LAST VISITED:** Lists the sites the user has visited recently.
- **MEMBER OF:** Lists all sites the user is member of (has member access or owner access to).
- **ALL:** Can be used to search for any site the user has read access to.

The user can follow or unfollow a site by clicking the star, in the search result or the Last visited or Member of lists. A grey star indicates that the site is not followed and a black or colored star indicates that the user follows the site.

Two things will happen when a user follows a site:

- The site will be available as a quick link in the “Following” tab in the My Sites control.
- Any conversations in the newsfeed on the site will be available in the user feed on the start page.

If you are using Microsoft Teams and/or Yammer in your solution, My Sites can indicate when a Team Site is attached to a Teams group or a Yammer group. This is indicated by an icon. See HR Department and Project Jupiter (Teams) and Supplier Conference 2019 (Yammer) in the image above. A user can click the icon to go to the group.

Settings for the control

The following settings are available for the My Sites control:

My Sites Settings

×

GENERAL

SITE CREATION SETTINGS

CUSTOM COLORS

☒

Following

Order By

Title

☒

Last visited

Row Limit

10

No of Highlighted Items

3

☒

Member of

Order By

Title

☐

Open in New Window

☒

Use Letter Avatar

☐

Exclude Personal Site

The General tab

On the General tab you can select which tabs to display (All is always displayed) and set the following:

- **Following:** Select order for the site links: Title or Last Visited.
- **Last visited:** Set the Row Limit, ie the number of site links to be displayed. Select the number of the displayed links to be highlighted (at the top).
- **Member of:** Select order for the site links: Title or Last Visited.
- **Open in New Window:** Select to open in new window or not when a link (site) is clicked.
- **Use Letter Avatar:** Select to use Letter Avatars or not. In the image at the top of the page letter avatars are not used. Here's an example when they are:
- **Exclude Personal Site:** If personal sites should not be shown in the list, select this option. A personal site is the OneDrive site where a user's files are stored.

The Site Creation Settings tab

On this tab you can set the following:

My Sites Settings ×

GENERAL **SITE CREATION SETTINGS** CUSTOM COLORS

Label
Create new site

Site Template Group
Intranet

Link

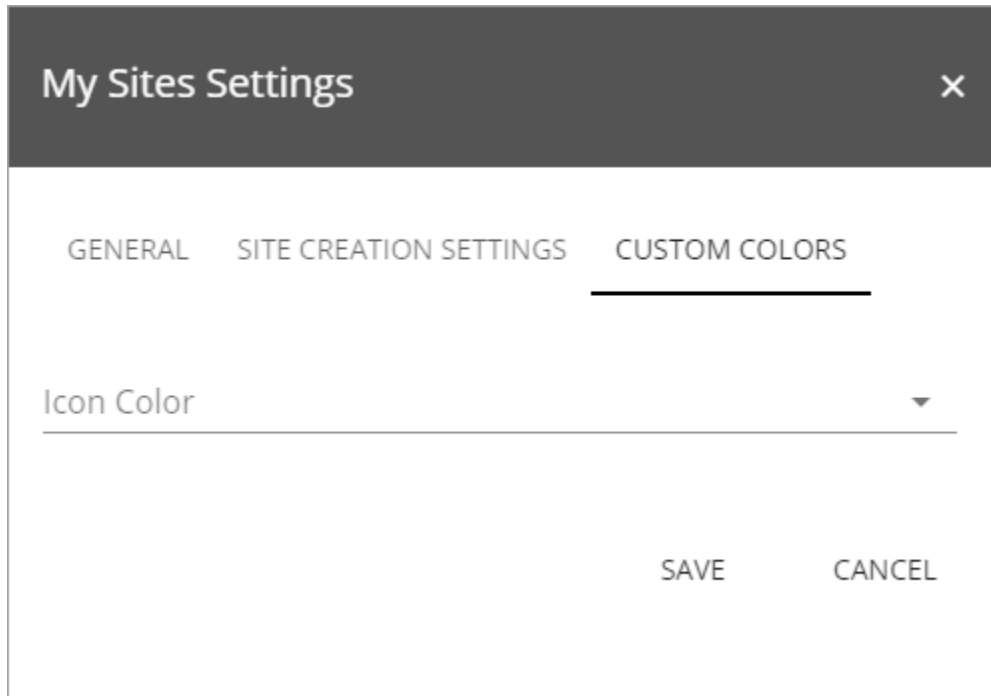
SAVE CANCEL

- **Label:** Here you can set the label for “Create new site” to something else.

- **Site Template Group:** Type the name of the template group to be used for creating new sites here, if you use more than one group. The template groups are set up in Omnia Admin when creating or editing site templates.
- **Link:** If a custom form has been created for the Create Site function, the url to the form should be put in here.

The Custom colors tab

You should primarily set colors through Theme colors in Omnia Admin (System/Settings/Default colors). If you still would like custom colors for the control, you can set colors for the icons (the star) here.



My Sites Settings

GENERAL SITE CREATION SETTINGS **CUSTOM COLORS**

Icon Color

SAVE CANCEL

My Sites Web Part/block

My Sites can also be added to any legacy page as a web part and as a block to a Quick Page. The web part/block can be set to display either the “Following” list or the “Last Visited” list from My Sites, but the user cannot stop follow sites from the list.

In this case the following settings are available:

My Sites Settings

GENERAL

CUSTOM COLORS

Heading

My Sites

Query Type

Following

Row Limit

5

☒ Open in New Window

☐ Use Letter Avatar

Visible

Always

SAVE

CANCEL

- **Heading:** You can change the heading that is displayed for the control.
- **Query type:** Select to display either “Following” or “Last Visited”.
- **Row Limit:** The maximum number of rows to display before a “Show more” link appears.
- **Open in New Window:** Select to open in new window or not when a link (site) is clicked.
- **Use Letter Avatar:** Select to use Letter Avatars or not. See above for examples. In the image at the top of the page letter avatars are not used. The third image is an example when avatars are on.
- **Visible:** Set when the control will be visible; always, withing a maximum width or within a minimum width.
- **Custom colors:** You should primarily set colors through Theme colors in Omnia Admin (System/Settings/Default colors). If you still would like custom colors for the control, you can set colors on this tab.

My Sites Settings

GENERAL

CUSTOM COLORS

Background Color

Text Color

Border Color

Preview

Link 1

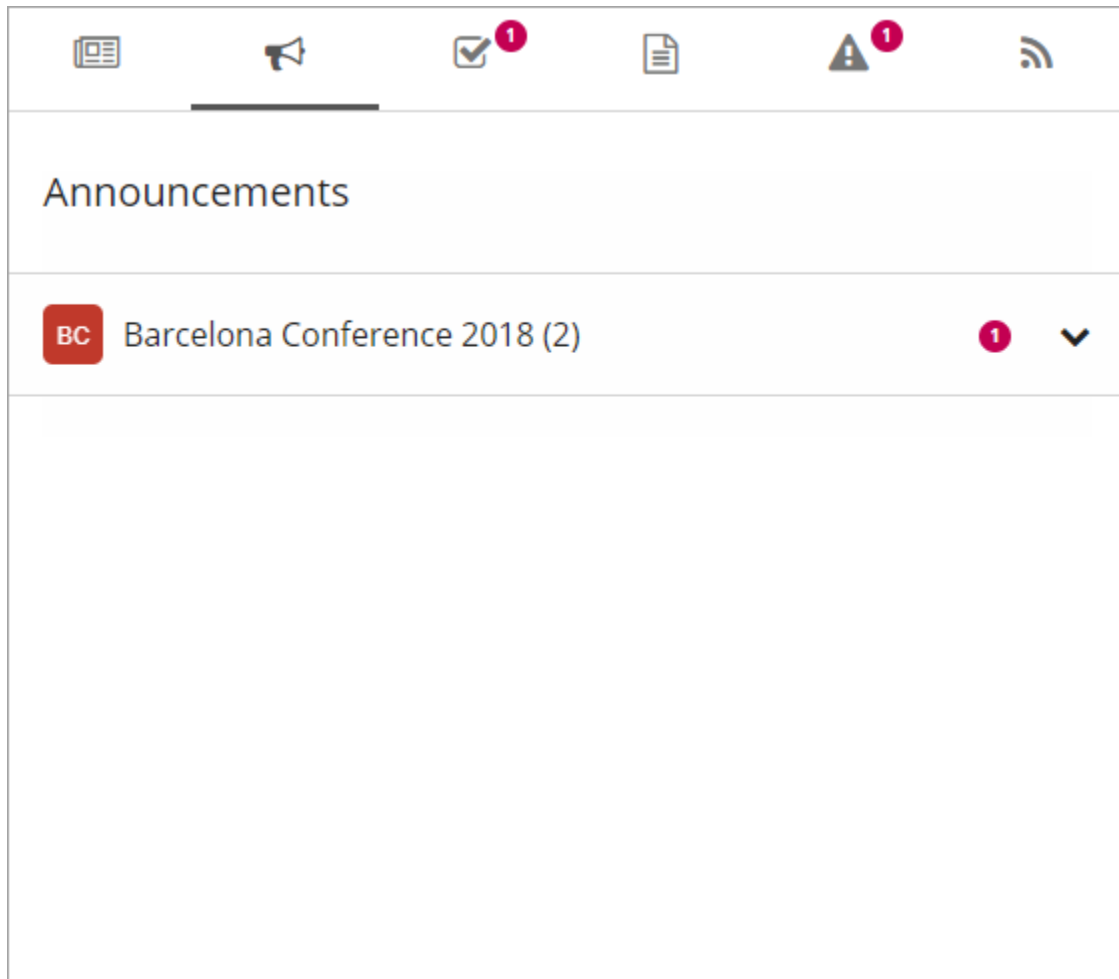
SAVE

CANCEL

1.3.4 Announcements

The Announcements Control aggregates the latest non expired announcements that the user has read access to.

The Announcements Control is often used as part of the Notification Panel, for example:



The Announcements Control can also be added as a block anywhere on a page.

Settings for the control

When the Announcements control is added on a page, the following settings are available:

Announcements Settings

GENERAL

CUSTOM COLORS

Row Limit

5

Day Limit

7

View

Grouped by site

☐

Always Show Letter Avatar

☐

Include Team News

1.3. Team Collaboration

SAVE

CANCEL

93

The General tab

- **Row Limit:** Set the maximum number of announcements to display in the list.
- **Day Limit:** Set the number of days for how old an announcement is allowed to be, to be shown in the list. This is based on the modified date for the announcement.
- **View:** Select to view the announcements in a single list, in time order or grouped by site.
- **Always Show Letter Avatar:** Select this option if letter avatars should be used. (In the top image, avatars is used.)
- **Include Team News:** Team News is the type of news that can be created in a modern team site. If these news messages should be included, select this option.

The Custom colors tab

You should primarily set colors through Theme colors in Omnia Admin (System/Settings/Default colors). If you still would like custom colors for the control, you can set them here.

Announcements Settings

GENERAL

CUSTOM COLORS

Accordion Background Color

Accordion Text Color

Accordion Icon Color

Border Color

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SAVE

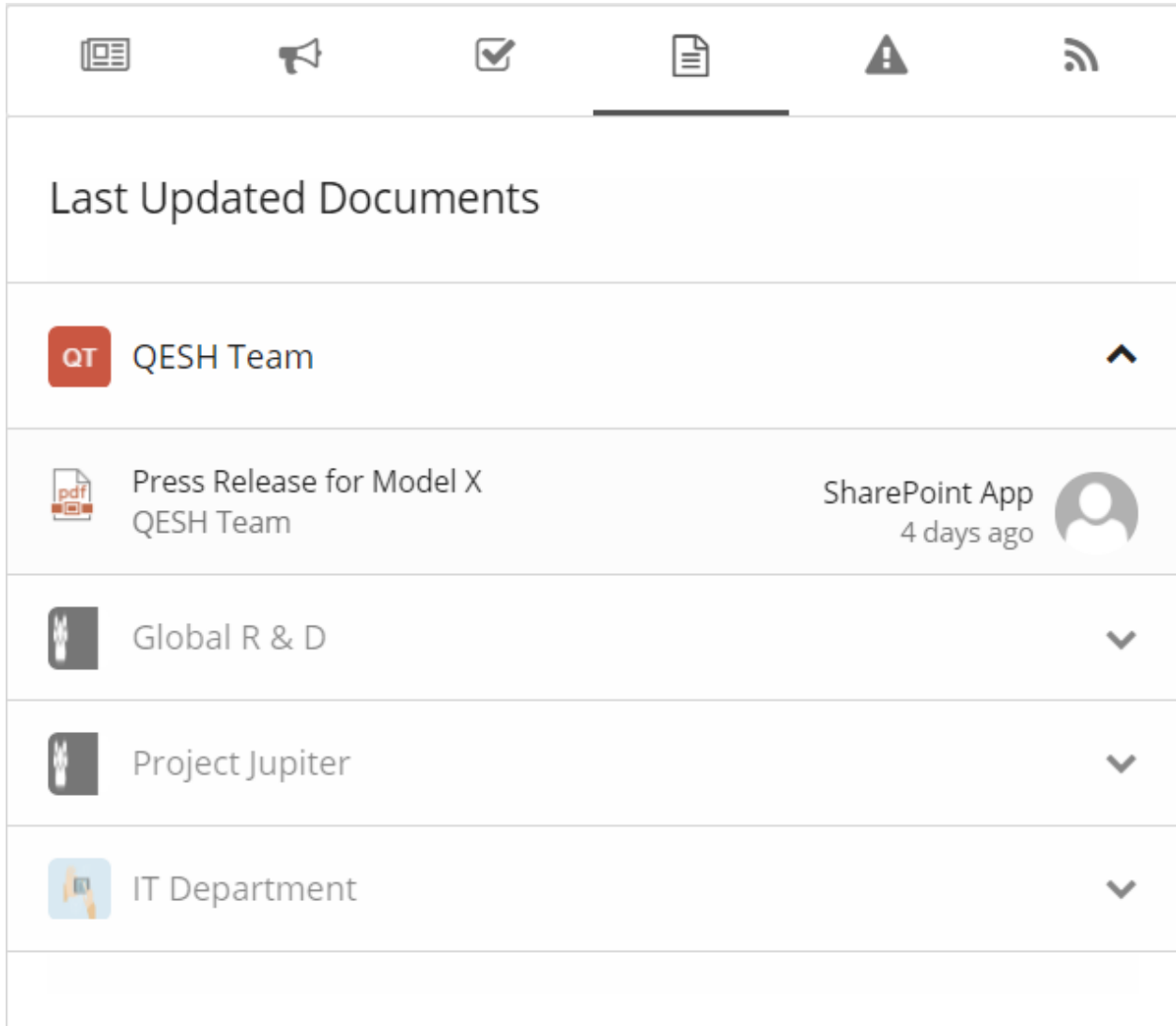
CANCEL

1.3.5 Last Updated Documents

The Last Updated Documents control aggregates all documents that have been recently modified by someone else from all sites the user is following.

Note! The Last Updated Documents control is based on the search engine in SharePoint. It may take several minutes before an updated document is shown in the control.

Last Updated Documents is often used in the Notification Panel, for example:



It can also be added as a separate control.

Settings for the control

When added as a separate control, the following settings are available for that control:

Latest Documents Settings

GENERAL

CUSTOM QUERY

CUSTOM COLORS

Title

Row Limit

10

Day Limit

30

View

Grouped By Site

Icon

Image

☐ Open in Client App

☐ Always Show Letter Avatar

SAVE

CANCEL

The General tab

On this tab you can set the following:

- **Title:** Here you can add a title for the control.
- **Row Limit:** The maximum number of documents to show in the list.
- **Day Limit:** The number of days back to get updated documents based on their modified date.
- **View:** Select to view the announcements in a single list, in time order or grouped by site.
- **Icon:** Select how to display the icons for the document type, Sketched (black and white) or Image (color).
- **Open in Client App:** If you would like the document to always be opened in the full version of application (the version installed on the computer, not the online version), check this box.
- **Always Show Letter Avatar:** If letter avatars should be used, select this option. The red “QT” for Qesh Team in the top image, is an example of a letter avatar.

The Custom Query tab

On this tab, the following settings are available:

Latest Documents Settings

GENERAL

CUSTOM QUERY

CUSTOM COLORS

Exclude File Types

Add

Query Template

Title Search Property

Author Search Property

SAVE

CANCEL

- **Exclude File Types:** Use this field if certain file types should not be displayed in the list.
- **Query Template:** Search queries for advanced scenarios. One example could be “fileextension:DOCX” to only show docx documents.
- **Title Search Property:** This property decides which Managed Search Property that should be used for the title field in the list. By default, it is set to the Managed Search Property “Title”.
- **Author Search Property:** This property decides which Managed Search Property that should be used for the modified by field in the list. By default, it is set to the Managed Search Property “Author”.

The Custom Colors tab

You should primarily set colors through Theme colors in Omnia Admin (System/Settings/Default colors). If you still would like custom colors for the control, you can set them using this tab.

Latest Documents Settings

GENERAL

CUSTOM QUERY

CUSTOM COLORS

Accordion Background Color

Accordion Icon Color

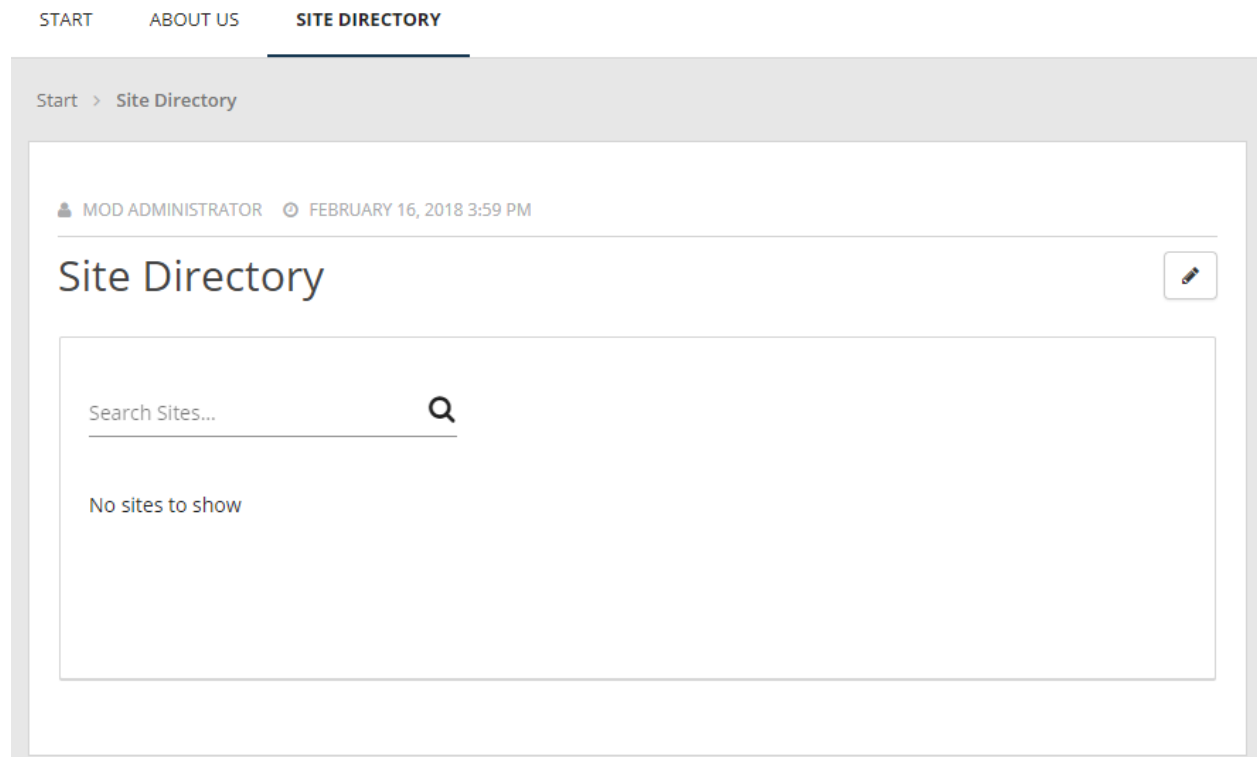
Accordion Text Color

Border Color

1.3.6 Site Directory

Setup Site Directory

1. Go to Omnia Admin > Features.
2. Activate the tenant scoped feature “Omnia Site Directory”.
3. (If you want to add support for the Site Directory legacy web part, go to Omnia Admin > Features and activate the site collection scoped feature “Omnia Site Directory Web Part”.)
4. Go to the start page of the main publishing site and select Manage Content.
5. Add a new page below Start called “Site Directory” using the layout “Page no left navigation”.
6. Switch to page layout mode and add the block “Site Directory” below the page Content.
7. Publish the page.



A Site Directory normally lists all sites the user has some sort of access to, of the site types the Site Directory is set to show.

This is an important difference to the My sites list, where one list displays all sites the user follows, and another list displays all sites the user are a member of.

An owner of a site can decide to show the site in the Site Directory even for users that has no access, using the setting “Make public in Site Directory”, available in “Team Site Quick Edit”.

Microsoft 365 team sites that are created with Omnia site templates are also shown in the list.

The user can view the list for all sites or for a certain type of site (a “type” is all sites created from a certain site template).


THOMAS MODADMIN FEBRUARY 2, 2016





Site Directory

Use the filters and search box below to find a specific site.


ALL SITES
COMMUNITY SITE
DEPARTMENT SITE
FASTIGHETSYTA
MARKETING CAMPAIGN

PROJECT EXECUTION
PROJECT SITE
QMS SITE




Search Sites... 

TITLE	CREATED	
 Ad-hoc constant improvement	Dec 22, 2017	▼
 Admin	Dec 22, 2017	▼
 Adventrix Global	Dec 22, 2017	▼
 Adventrix Main Process	Dec 22, 2017	▼

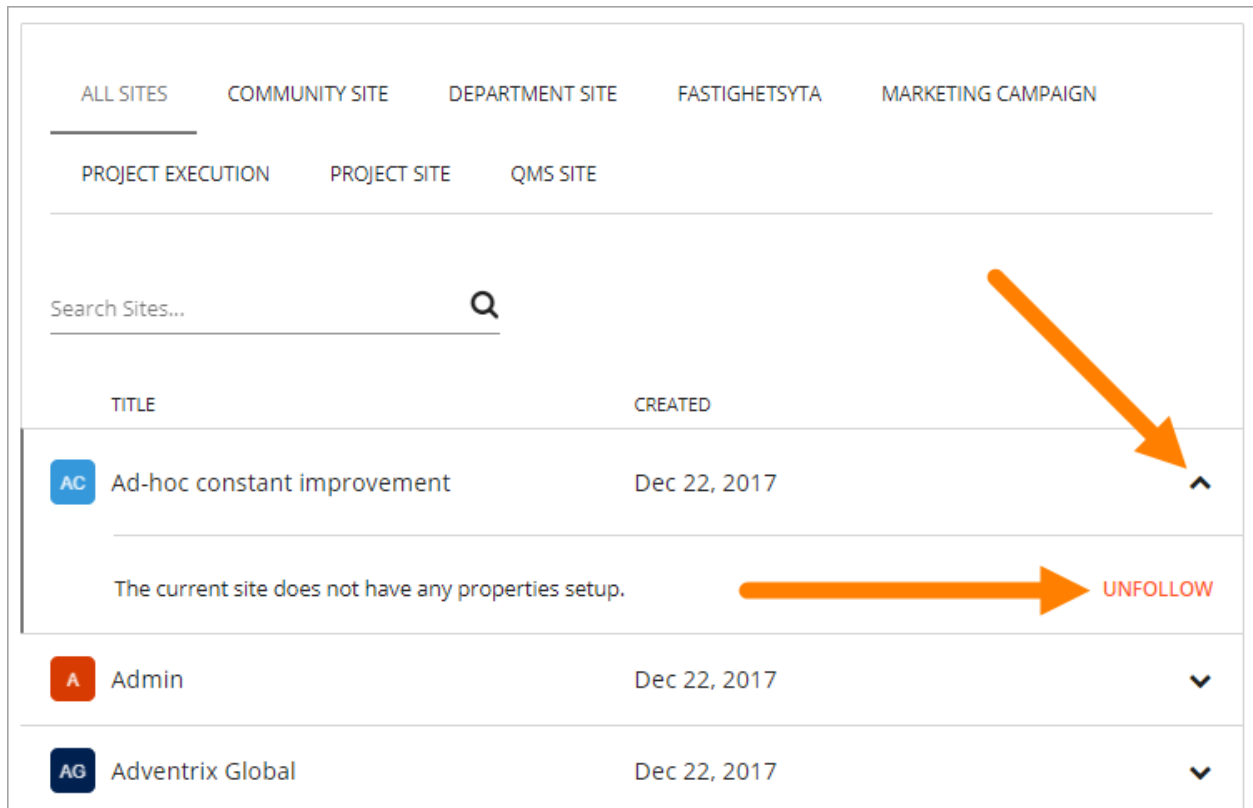
The user can search for sites using the site title.

Search Sites... 

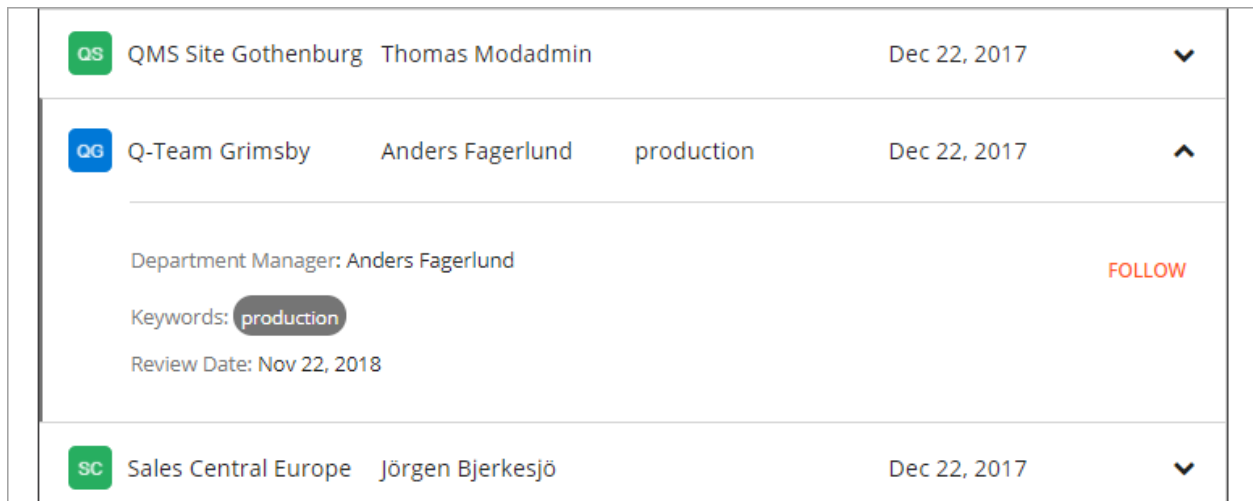
Commun

TITLE	CREATED	
 Communication	Dec 22, 2017	▼
 ISO 9001 Community	Dec 22, 2017	▼
 Sales and Marketing Community	Dec 22, 2017	▼

The user can follow or unfollow a site by opening the small menu to the right:



In the panel opened by this menu additional information about the site can be shown, for example:



The properties, that can be shown here, are set for the site template, except “Title” and “Created” which is always used, and displayed as headings in the list. See this description for more information about site template properties: [Site Templates](#)









To implement a Site Directory, note the following:

- The Omnia features “Omnia Site Directory” and “Omnia Site Directory Web Parts” must be active.
- The Site Directory can be added as a web part to a standard Sharepoint site or as a block to a Quick Page.
- The web part/block can be added to any web part zone/area, but note that the Site Directory requires some space.

Icons for Teams and Yammer

If you are using Microsoft Teams and/or Yammer in your solution, the Site Directory can indicate when a Team Site is attached to a Teams group or a Yammer group. This is indicated by an icon.

Here's an example with Teams groups attached to Project Altair and Project Apollo:

 Production Detroit	February 21, 2018	▼
 Project Albatross	March 7, 2019	▼
 Project Alpha	February 21, 2018	▼
 Project Altair 	March 26, 2019	▼
 Project Apollo 	May 3, 2019	▼
 Project Beta	February 21, 2018	▼

A user can click the icon to go to the group.

Settings for the control

The following settings are available for the control:

Site Directory Settings

×

GENERAL

FILTER

☒ Show Title

Title
Site Directory

Page Size

50

☐ Always Show Letter Avatar

☐ Open in New Window

☒ All Site Templates

☐ Limit Site Templates

SAVE

CANCEL

The General tab

Here you can set the following:

- **Show Title:** Decide if a Title should be shown or not. Default = Shown (selected).
- **Title:** If the Title is shown: Add the title here.
- **Page Size:** Set the number of list rows that should be displayed on each page.
- **Always Show Letter Avatars:** If letter avatars should be shown, select this option. (The image at the top shows letter avatars.)
- **Open in New Window:** Select this option if the site should be opened in a new window when a user clicks a link in the list. Default = opened in the same window.
- **All Site Templates:** If it should be possible to show all site types in the list, check this box (default).
- **Limit Site Templates:** If just some site types should be shown in the Site Directory, check this box and select all site types to show from the list. Here's an example with three site types selected:

Site Directory Settings

GENERAL

FILTER

Title

Site Directory

Page Size

50

☐

Always Show Letter Avatar

☐

All Site Templates

☒

Limit Site Templates

Site Templates

Community

Department

Project

☐

Show Tab 'All Sites'

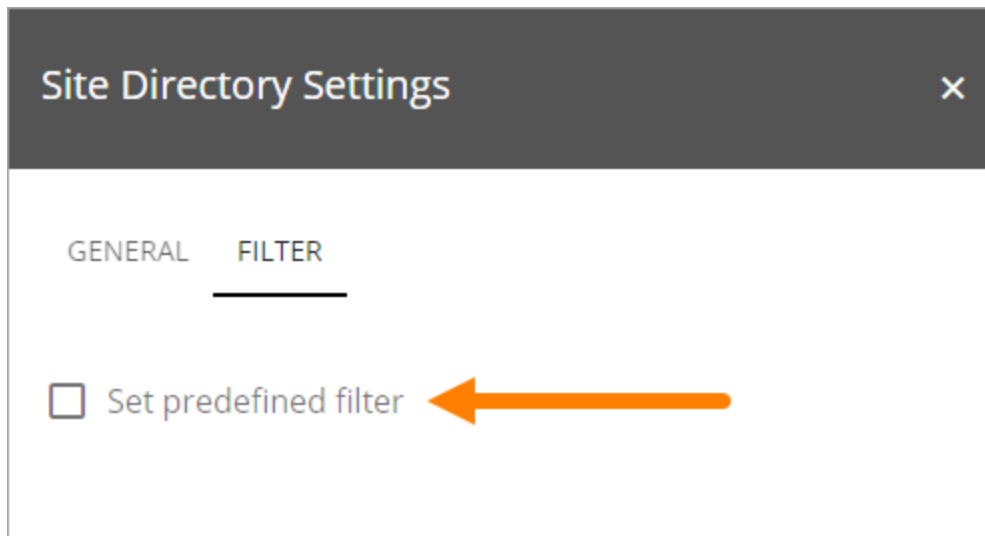
- **Show Tab 'All Sites'**: When you have selected “Limit Site Templates” you can select to show the “All Sites” tab or not - which in this case displays all sites of the chosen types.

The Filter tab

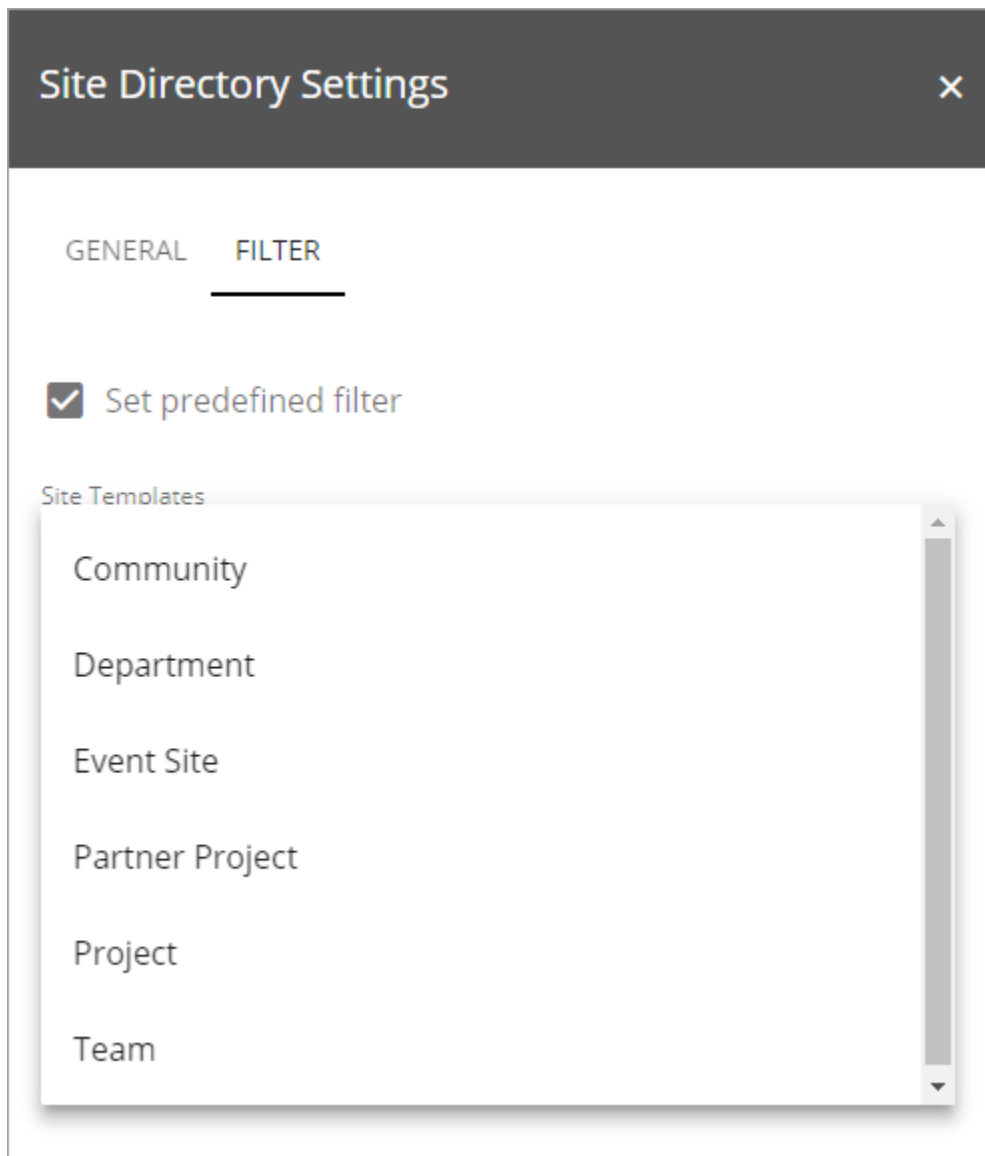
Use this tab to set the scope for the directory, for example to create a projects only directory. There are a number of predefined filters you can choose from.

To choose a predefined filter:

1. Select “Set predefined filter”.



2. Select filter from the list.



For some filters you can set additional details, for example to only display projects managed by a certain Project Manager, or just display archived projects.

Site Directory Settings

GENERAL

FILTER

☒ Set predefined filter

Site Templates

Project

Project Manager

Enterprise Keywords

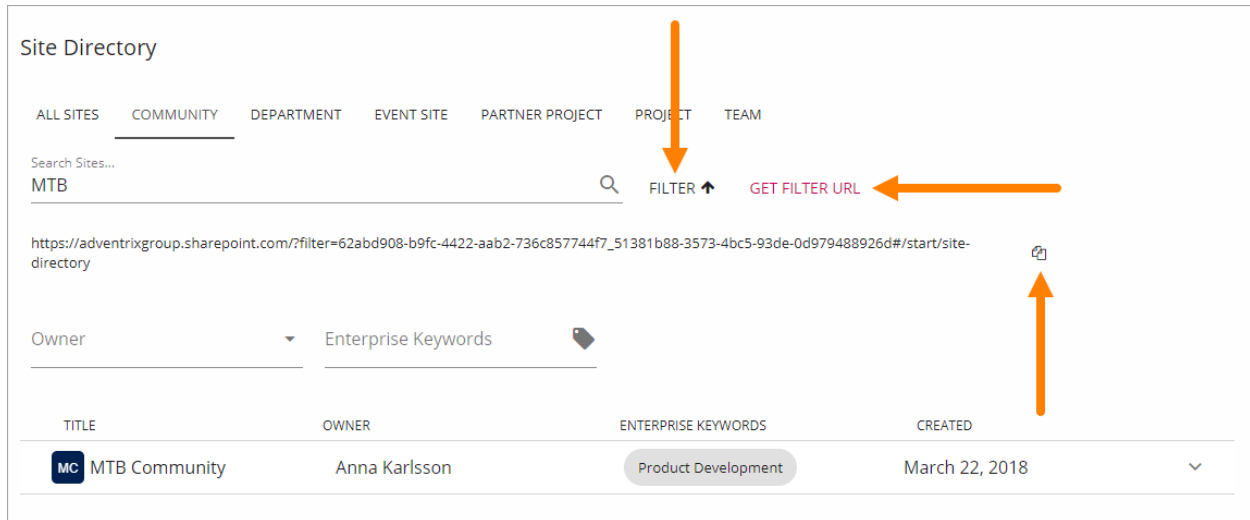
Organisation

Archived

SAVE

CANCEL

Tip! Users can create filters to share with others. When a user has searched the directory he or she can click “Filter” and then “Get Filter URL” to display the URL for the search resultat. The Url can then be copied and pasted for example into an e-mail.



1.3.7 Site Templates

Setup Site Templates

1. Go to Omnia Admin > Features.
2. Activate the tenant scoped feature “Omnia Site Templates”.

Enable Yammer group provisioning

If you would like to use Yammer as the conversations tool in team sites (available for Microsoft 365 groups only) - Yammer group provisioning needs to be enabled in the solution. The following steps needs to be carried out:

1. Make sure Azure Services is enabled in Omnia Admin.
2. Login to Yammer with a Network Admin account. (This account will be used by Omnia to provision new Yammer groups.)
3. Go to Settings > Apps and register a new app.

Register new App
×

All fields are required.

Application Name ?

Organization ?

Support e-mail ?

Website ?

Redirect URI ?

☒ By checking this box, you agree that you have read and agree to the [Yammer API Terms of Service](#).

Cancel
Continue

4. Note down the Client Id and Client Secret.
5. Browse to [https://www.yammer.com/oauth2/authorize?client_id={\[\]ClientId{}}&response_type=code&redirect_uri=https://www.yammer.com](https://www.yammer.com/oauth2/authorize?client_id={[]ClientId{}}&response_type=code&redirect_uri=https://www.yammer.com)
6. Click on Allow to authorize the app.
7. Copy the Code in the url in the page you get redirected to. (Something like: lirOpPqZXwjTpRXx4ctDA)
8. Browse to [https://www.yammer.com/oauth2/access_token.json?client_id={\[\]ClientId{}}&client_secret={\[\]ClientSecret{}}&code={\[\]Code}](https://www.yammer.com/oauth2/access_token.json?client_id={[]ClientId{}}&client_secret={[]ClientSecret{}}&code={[]Code})
9. Note down the token you receive from the JSON response. (Something like: 11503671-bAjUZJODAYrXENINKJNA)
10. Go to Omnia Admin > Settings > Azure AD > Yammer Group.
11. Read the prerequisites text and make sure your Yammer network is configured accordingly.

12. Put the token into the Yammer Access Token field.
13. Check the box “I ensure all prerequisites are configured correctly” and save.

Site templates can now use Yammer as its preferred way of handling conversations within a group.

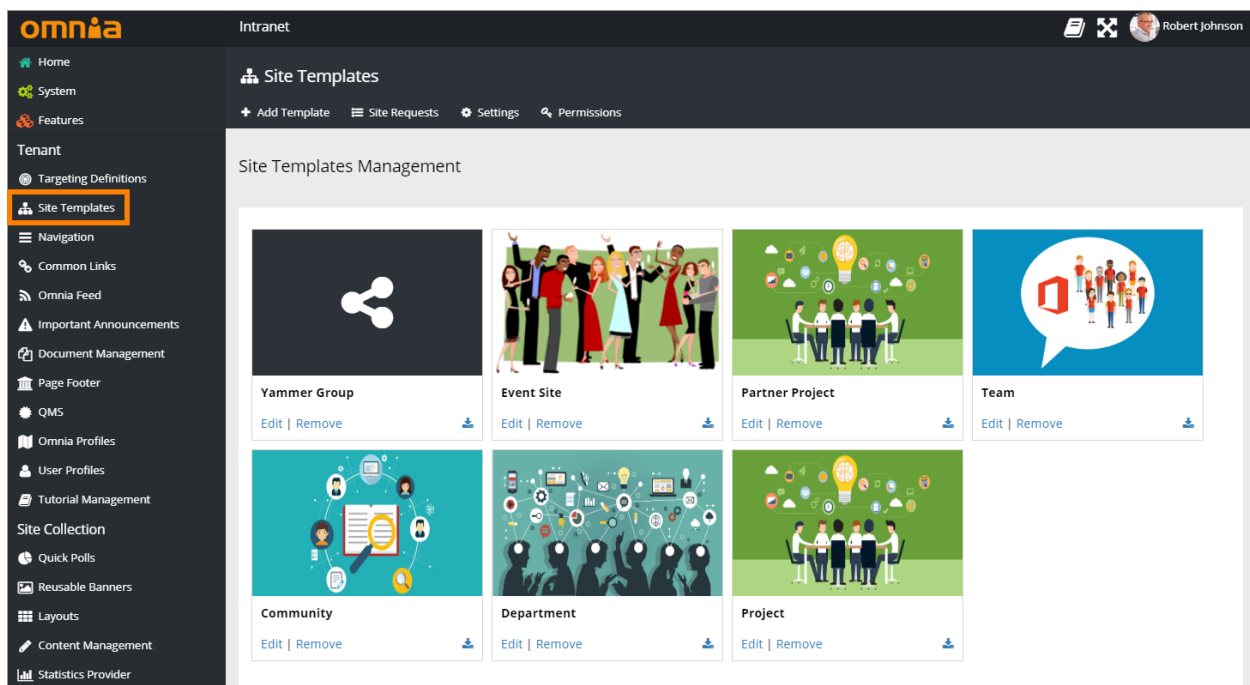
There are two different ways of implementing new site templates in Omnia:

1. Implement through code (normally done by a developer).
2. Add/edit templates in the Site Templates user interface in Omnia Admin.

The first option does not necessarily rule out the second. A possible, and rather common scenario, is that a developer implements a number of templates that an administrator then can edit to add some details.

An important difference is that a developer can lock parts of, or the whole site template. A locked template can't be deleted but can be edited, or be cloned to form the base for a new template created here.

When you enter Site Templates, the existing templates are shown, for example:



Any existing template can be downloaded as JSON (normally only used by developers).

Create or edit template

When you create or edit a template, the following fields and options can be used:

The first step when creating a new template is always to select “Site collection”, “Sub site” or “Microsoft 365 Group”. For different kinds of Omnia team sites, you should normally select “Site collection”. If you would like to create a standard Microsoft 365 group, click that option. In an Microsoft 365 group you get all the standard tools, for example a group mail. An Microsoft 365 group will be available in “My Sites” the same way as the Omnia sites.

The General tab

The following can be set on this tab:

- **Name:** The title of the template, shown under the image.
- **Language:** Select language for the template. On the “Settings” tab you can set if the user is allowed to change language or not. This option is not available for Microsoft 365 Groups, language is in this case handled through Microsoft 365.
- **Omnia Profile:** An Omnia Profile can be used for this site template, if profiles are set up. See more info about Omnia Profiles here: [Omnia Profiles](#)
- **Base template:** Select template to base the new template on. If in doubt, select “Team site”, it’s the most commonly used. This option is not available for Microsoft 365 Groups.
- **Location:** Select location for the sites created from this template. For a site collection site, you can select to create sites from this template in any of the managed paths, normally either /sites or /teams. For sub sites you can select that a site created from this template will be placed as a sub site to the current site, or in a certain site collection (recommended) for example /sites/projects. This option is not available for Microsoft 365 Groups.
- **Description:** Add important details for the template here, for example when this template should be used.
- **Icon:** The icon is shown in the My Sites lists for all sites created with this template, and in the Site Directory. Useful to, at a quick glance, see what type of site it is. You can use an icon from the built in set, or choose any image as an icon. Not mandatory. This option is not available for Microsoft 365 Groups.

- **Image:** You can select any image for the template.

The Settings tab

The following can be set on this tab:

- **Permission Level:** Selecting “Self Service” means users can create sites from this template themselves. When you select “Approver” you must also add approver(s). This can be a person or a service account. A notification e-mail is sent to the approver(s) when a user requests a site. All requests are placed in the “Site Requests” list, see below. Approval can be useful to for example make sure name standards are used correctly or the correct template is used for the stated purpose.
- **Template Group:** You can use headings to group templates. This can be used in the settings for the My Sites control, to define which template group should be available when creating or requesting new sites, in a certain publishing site.
- **Display To:** This can be used for targeting templates to a specific group of users.
- **Default Administrator:** If empty, the user creating or requesting the site will automatically become the administrator (Owner) of the site. If a specific group or user should be administrator for all sites created from this template, add that group or user. Not available for sub sites or Microsoft 365 groups.
- **Default Secondary Administrator:** If empty, the user creating or requesting the site can set default secondary administrator of the site. If a specific group or user should be secondary administrator for all sites created from this template, add that group or user. Not available for sub sites or Microsoft 365 Groups.
- **Default Visitors:** You can use this to set a default visitor group (read permissions) to all sites created from this template. Let’s say it’s a template for community pages - then probably all users of the intranet should have read

permission to all pages in the site. Not available for Microsoft 365 Groups.

- **Default member:** This option is available for Microsoft 365 Groups only. If empty, the user creating the site will automatically become the default user (Owner) of the site. If a specific group or user should be default member for all sites created from this template, add that group or user.
- **Conversations:** This option is available for Microsoft 365 Groups only. The following alternatives are available: **None** - simply no conversations. **Legacy Site Feed** - The “Conversations” link in Quick Launch will take users to a modern page with the user feed block on configured as a Site Feed. **Teams** - a Microsoft Teams group will be created, related to the Microsoft 365 Group. The “Conversations” link in Quick Launch will take users to the group’s chat in Teams. **Yammer** - a Yammer group will be created. The Yammer group will be automatically connected to a new Microsoft 365 Group and team site. The “Conversations” link in Quick Launch will in this case take the user to the connected Yammer group.
- **Privacy:** This option is available for Microsoft 365 Groups only. An Microsoft 365 can be either public or private. In a public site all users of the tenant can enter the site, read and edit all information. In a private site only actual members of the site can do that.
- **Storage Quota (GBs):** You can use this to set maximum storage in Gb that can be used by a site created from this template.
- **Default Time Zone:** Select default time zone. Can always be changed by the user when creating or requesting a site.
- **User can select language:** If the user, when creating or requesting a site, should be able to choose language, select this option. Not available for Microsoft 365 Groups.
- **User can select Omnia Profile:** If the user should be able to select an Omnia Profile during site creation, select this option.
- **User can change privacy:** This option is available for Microsoft 365 Groups only. When active, the user creating the group can change privacy. If not active, all Microsoft 365 Groups will have the privacy setting you set here.
- **Allow Administration of Sharepoint Groups:** Available for Microsoft 365 groups only. Check this option if it should be possible to handle traditional Sharepoint groups in the site.
- **Unique Permission:** Only available for sub sites. Check if permission inheritance should not be on for sub sites created from this template.
- **Send access request to:** Select receiver of access requests. Note that you can use the last option to enter an e-mail to any user of the site, but also note that a user must have owner permission to be able to grant permission to the site.

The Features tab

The following is available here:

Site Collection

- ☐ Omnia Intranet Content Management
- ☐ Omnia QMS Page layouts
- ☐ Omnia Intranet Page Layouts
- ☐ Omnia Enable External Sharing
- ☐ Omnia Image Picker Settings
- ☐ Omnia Intranet Quick Polls Web Part
- ☐ Omnia Intranet People Rollup Web Part
- ☐ Omnia QMS Webparts
- ☐ Omnia Intranet News Infrastructure
- ☐ Omnia Legacy Support
- ☐ Omnia Intranet Banner Web Part
- ☐ Omnia Intranet Document Rollup Web Part
- ☐ Omnia Intranet My Links Web Part
- ☐ Omnia SPFx Infrastructure
- ☐ Omnia Aggregated Content Web Parts
- ☐ Omnia Intranet Search Center Fixup
- ☐ Omnia Core Token Proxy Page Deployment
- ☐ Omnia Document Management Authoring Infrastructure
- ☐ Omnia Core Master Page
- ☐ Omnia Start Page Layout
- ☐ Omnia Document Management Archive Site
- ☐ Omnia Intranet Aggregated Calendar Web Part
- ☐ Omnia Intranet User Profile Completeness Web Part

Site

- ☐ Omnia Intranet Social
- ☐ Omnia Intranet Team Site - Reporting Documents
- ☐ Omnia QMS Process Template
- ☐ Disable Minimal Download Strategy
- ☐ Omnia Intranet Team Site - Tasks
- ☐ Omnia Intranet Team Site - Announcements
- ☐ Omnia Team Site - Welcome Page
- ☐ Omnia Document Management Authoring Site
- ☐ Omnia QMS Process Instance (Legacy)
- ☐ Omnia Document Management Create Document Wizard
- ☐ Omnia Intranet Team Site - Calendar
- ☐ Omnia Fx Test Page
- ☐ Omnia Intranet Team Site - Links
- ☐ Omnia QMS Process Instance Provisioning
- ☐ Omnia Intranet Team Site - Controlled Documents
- ☐ Omnia QMS Process Authoring Site
- ☐ Omnia Intranet Team Site - Contacts
- ☐ Omnia Glue Site
- ☐ Omnia Intranet News Center

(All features are not shown in the image.)

Select all Omnia features that should be active for sites created from this template.

Note that all features are not available for sub sites or Microsoft 365 Groups.

The Properties tab

On this tab you define which site properties that should be used for sites using this template. This tab is not available for sub sites.

Field type	Name	Mandatory	Multiple	Filterable	Viewable
Text		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Create Cancel

The first step is to select “Field type” in the list. For “Managed metadata” you have to select a term set. For “Enterprise Keywords” no settings can be submitted. Enterprise Keywords are always shared throughout the tenant.

For each property you can set:

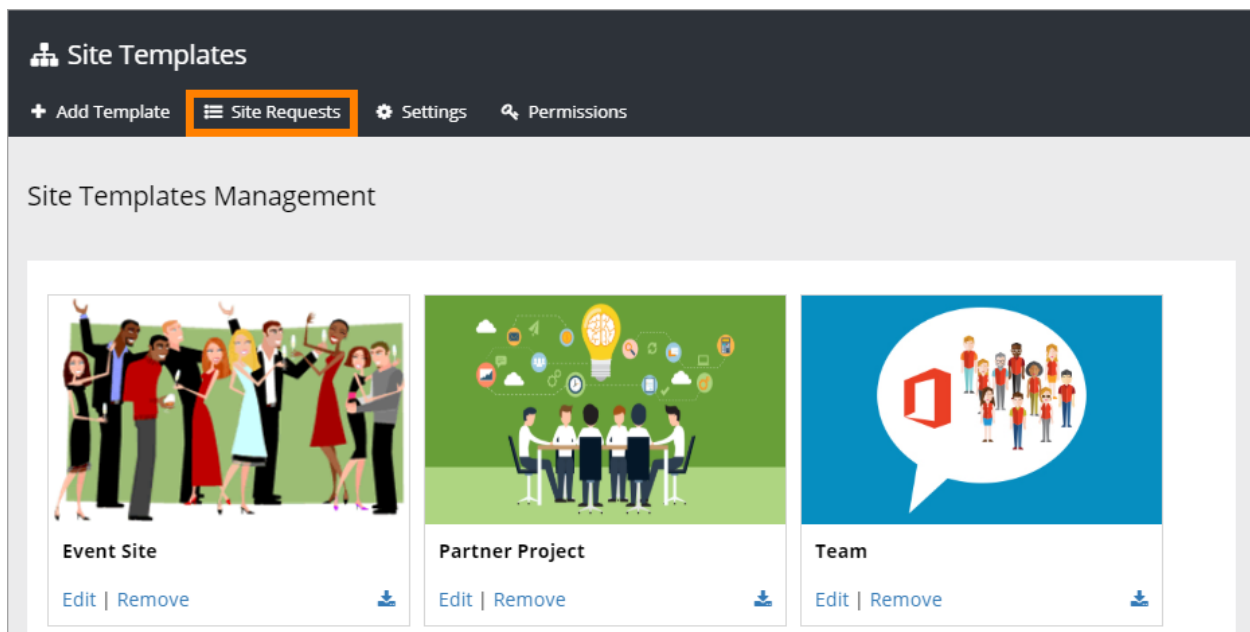
- **Mandatory:** Set mandatory or not.
- **Multiple:** Set if multiple choices should be allowed.
- **Filterable:** If the field should be available for filtering in the site directory, select this option.
- **Viewable:** If information from this field should be displayed in the Site Directory list, select this option.

If changes for the properties are made in an existing site template, the changes will be pushed to all existing sites created from the template. If there are many sites created from the template, this can take considerable time to execute.

Note! If a properties field is removed from a site template, all data for that field, in all sites created from the template, will be deleted.

Site requests

When “Approval” is selected for any site templates, all requests are placed in this list.



An administrator selects a request from the list, and can see the settings, edit some of them if needed, and approve or reject creation of the site.

Title	Description	Requested	Requested by	Status
New Ball Room Project	Project site for the new ball room project, for Ballroom Society Inc.	2018-12-04 12:28	Robert Johnson	Pending

Click a link to browse the settings and properties.

The process of approval or rejection is done through a number of steps. The last step is to approve or reject the request.

Manage requests - Site information

Here site information can be edited if needed:

×

Manage request - Site Information

Title

New Ball Room Project

Description

Project site for the new ball room project, for Ballroom Society Inc.

Url

https://adventrixgroup.sharepoint.com/sites/ new-ball-room-project

✔ This is a valid url.

Language

English (United States) ▼

Omnia Profile

[Default Mapping] Omnia Core Master Page ▼

Time zone

(UTC+01:00) Amsterdam, Berlin, Bern, Rome, Stockholm, Vieni ▼

☒ **Make Public in Site Directory**

Next

Close

- **Title:** The title can be edited here. It could for example be needed if the title of the site does not follow name conventions in your organization, .
- **Description:** The description can be edited here, if needed.
- **Url:** The last part of the Url can be edited if needed.
- **Language:** If the requester has selected the wrong language, change it here.
- **Omnia Profile:** If profiles are used, you can select another Omnia Profile if needed. You can find more information on Omnia Profiles here: [Omnia Profiles](#)

- **Make Public in Site Directory:** This option can be changed here.

Manage requests - Properties

The fields available here depends on how the site template was set up. This is probably a common example for project sites:


×

Manage request - Properties


Project Manager

Anna Karlsson x

Keywords

Adventrix Group x 

Organisation

Production x 

Archived

▼

Previous

Next

Close

In name fields, users can be removed or added the usual way, in other fields metadata can be deleted or added from a fixed list. Note that “Arhcived” cen not be empty. It must be set to either Yes (normally) or No.

Manage requests - users

Here users can be added or removed:

×

Manage request - Users

Owner

Robert Johnson x

Members

Visitors

☐ Send an email invitation

Previous

Approve

Reject

Close

If for example a central administration should be added as owner for all sites, this is the place to do that.

For “Send an email invitation” you can change the requesters choice, if needed.

Here you make the final selection as well - to approve or reject creation of the site. If “Approve” is selected the site is created. If “Reject” is selected, a form is displayed where comments on why the site request was rejected should be entered.

×

Manage request - Rejection

Reason for rejection

Save

Close

If a site request is rejected, an e-mail is sent to the requester, with the message you entered. A new site request must then be done.

Settings

Use “Settings” to disable dynamic properties for some site templates, if needed.

Site Templates


+ Add Template

Site Requests

Settings


Permissions

Site Templates Management




Event Site

Edit | Remove



Partner Project

Edit | Remove



Team

Edit | Remove



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123

The settings can look something like this:

Settings

Disable dynamic properties for these site templates

Publishing Site	
Publishing Portal	
<div>Team site (classic experience)</div>	<div><div>Add</div></div>

Save

Use the list to add additional sites to disable dynamic properties in. To remove a site from the list, to enable dynamic properties, click the dust bin.

Permissions

If additional users should be able to create site templates, use “Permissions” to add them.

Site Templates


+ Add Template

Site Requests

Settings


Permissions


Site Templates Management



Event Site


Edit | Remove






Partner Project


Edit | Remove





Team

Edit | Remove



You add or remove users from this list:

Site Templates Tenant Administrators

Andreas Ekdahl MOD Administrator Anders Fagerlund Jörgen Bjerkesjö

These users are allowed to manage all the site templates.

Site Requests Tenant Administrators

Andreas Ekdahl MOD Administrator Anders Fagerlund Jörgen Bjerkesjö

These users are allowed to approve/reject the site requests.

Save

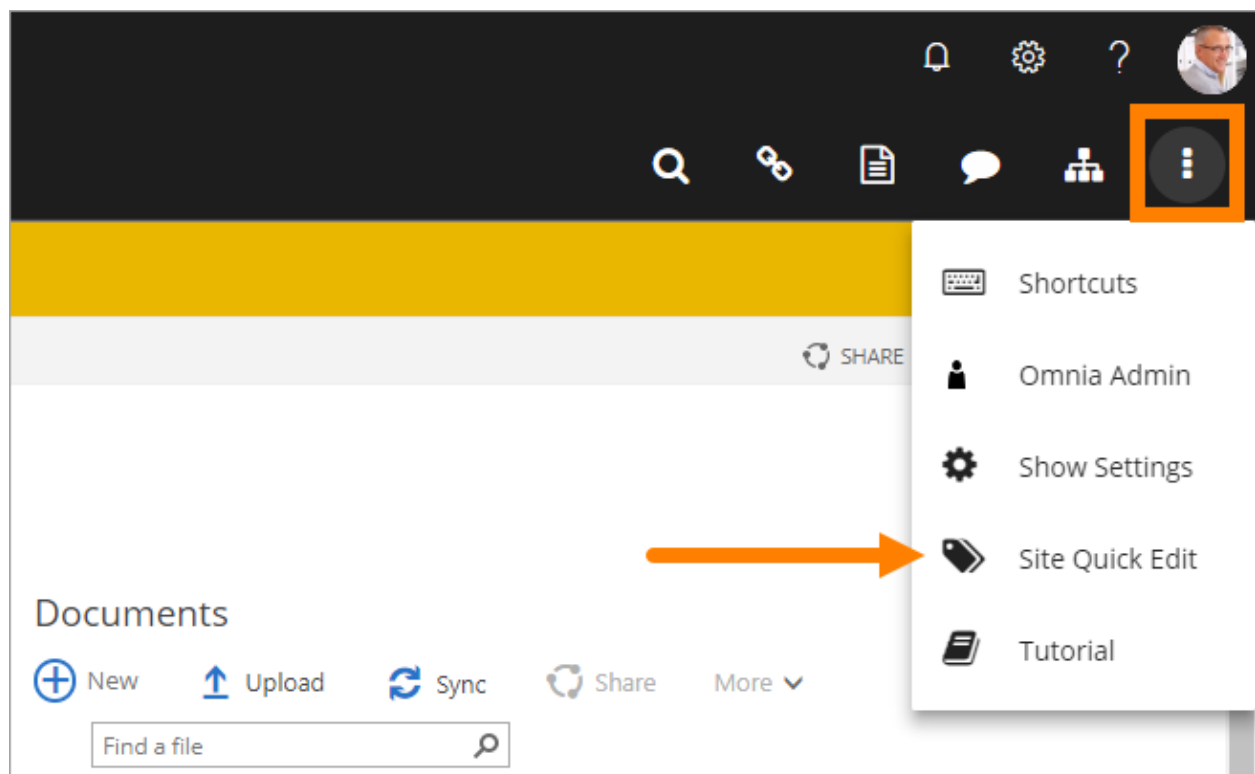
1.3.8 Team Site Quick Edit

Site Quick edit is available in team sites and similar, for site owners. The purpose is twofold:

- to be able to add and remove site users in a quick and easy way,
- to be able to edit the properties for the site.

Which properties (fields) should be available is set in the site template for each type of site. That can't be changed here. All sites created from a certain template always has the same property fields.

To access Site Quick Edit, open the menu and click the button:



The first tab is used for adding and removing site users, for example:

Team Site Quick Edit

SITE USERS


SITE PROPERTIES


Excel Services Viewers

Project Jupiter Document Authors


Project Jupiter Document Readers

Project Jupiter Members

 Anna Karlsson

 Lynne Robbins

Project Jupiter Owners

 Robert Johnson

Project Jupiter Visitors

☒ Send an email invitation

1.3. Team Collaboration

OK

CANCEL

Groups for Owners, Members and Visitors are normally present. There can be other groups depending on how the site is set up. (The Document Authors and the Document Reader groups are for example Omnia Document Management groups.)

Note! When a user is added to any of the user groups, an e-mail is automatically sent to that user, with a link to the site.

The second tab is used for editing the properties, for example:


Team Site Quick Edit

SITE USERS

SITE PROPERTIES

☒ Make Public in Site Directory

Project Manager*

 Lynne Robbins

Enterprise Keywords

...

×

...

×

Organisation

...

×

Archived

No

1.3. Team Collaboration

OK

CANCEL

Available properties vary depending on how Omnia, and the site, are set up.

There are no settings for the control.

1.4 People and Networking

1.4.1 User Profile Completion Wizard

Setup User Profile Completion Wizard

1. Go to Omnia Admin > Features.
2. Activate the tenant scoped feature “Omnia Intranet User Profile Completeness Core”.
3. The Profile Completeness block is now available in quick pages.
4. If you want to add support for the Profile Completeness legacy web part, go to Omnia Admin > Features and activate the site collection scoped feature “Omnia Intranet User Profile Completeness Web Part”.

The user profile completion wizard is a tool to help end users fill in their user profiles.

Education

Please share which training and certificates you have

✓

General

General settings like name, picture and e-mail

2

Education

3

Skills

Share your skills and let your colleagues find you

✓

News Subscription

Fill in your preferred areas of interest to get the most relevant news for you

Training

Certifications

Office 365

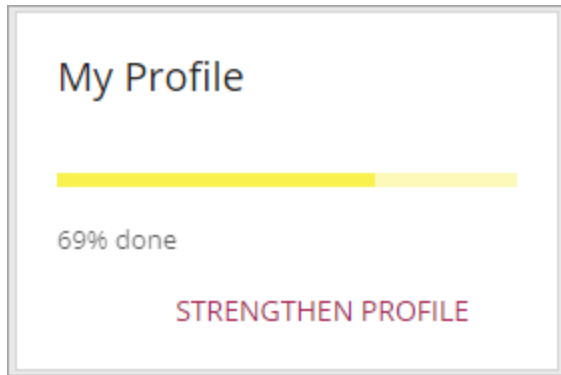
UPDATE

SKIP

69% done

CLOSE

The wizard is shown as a dialog and can be accessed via the Strengthen Profile block.



It can also be scheduled to appear automatically to the end user via settings in Omnia Admin > User Profiles.

User Profiles

Property MappingsPermissions

Settings

Show Dialog

☐ Daily

☒ Weekly

☐ Monthly

Every week(s)

☐ Sunday

☒ Monday

☐ Tuesday

☐ Wednesday

☐ Thursday

☐ Friday

☐ Saturday

Start date

☒ No end date

☐ End by

Localization

en-US

Title

Description

It is important that you fill in your profile. We use it for others to find you and to target information to you.

Feedback Address

Levels

#800000

<

%

#ffff00

>

%

#008000

>

%

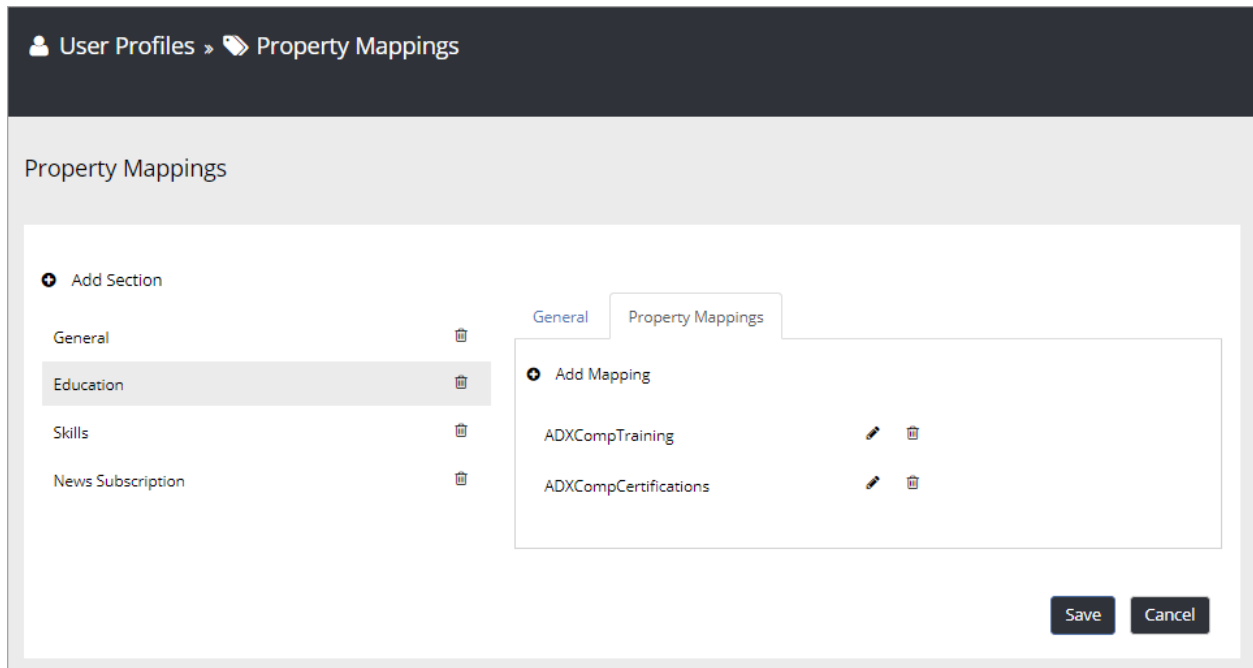
Save

- **Show Dialog:** The schedule that should be used to show the User Profile Completion Wizard to the end user. The dialog is shown on all Omnia pages and are shown until the user closes the dialog.
- **Localization:** Select which language to localize the Title and Description in. Available localization labels can be set in System > Settings > Intranet Core.
- **Title:** The overall title that should be shown in the Wizard when no specific section is selected.
- **Description:** The overall description that should be shown in the Wizard when no specific section is selected.
- **Feedback Address:** The e-mail address that should be used when an end user sends feedback for a specific property.
- **Levels:** Here you can set three levels of profile completeness with a matching color for each level and percentage span.

As an administrator you can set up sections and properties in the User Profile Completion Wizard. Each section can have its own title and description in different languages.

The screenshot shows the 'Property Mappings' configuration interface. On the left, a sidebar lists sections: General, Education (highlighted), Skills, and News Subscription. The main area on the right is titled 'Property Mappings' and contains three tabs: General, Property Mappings (active), and a third unlabeled tab. Under the 'Property Mappings' tab, there are three fields: 'Localization' with a dropdown menu set to 'en-US', 'Name' with a text input containing 'Education', and 'Description' with a text input containing 'Please share which training and certificates you have'. At the bottom right of the main area are 'Save' and 'Cancel' buttons.

Within each section, you can add property mappings.



A property mapping supports the following settings.

Property Mapping

Property
ADXCompTraining

Type
Term Set

Localization
en-US

Label
Training

Completeness Impact
Medium

Term Group
AdventrixGroup

Term Set
Training

Create New Term Set

☒ Multiple

☐ Read only

☐ Allow feedback

Ok Cancel

- **Type:** Can be any of the following values: “Profile Picture”, “Text”, “Multiline Text” or “Term Set”. You have to make sure the type match the related user property.
- **Property:** Select a built-in or custom property from the User Profile Properties in SharePoint. (Note! If “Profile Picture” is selected as Type, you do not have to select a property, because it will be stored in Microsoft 365.)
- **Localization:** Select a language if you need to localize the label.
- **Label:** The label that should be shown for the end user.

- **Completeness Impact:** If the user complete this property, this decides what the impact should be on the profile completeness percentage. You can select “Low”, “Medium” and “High”.
- **Term Group:** If “Term Set” is selected as type, you need to select a Term Group and a Term Set.
- **Term Set:** The “Term Set” will present the terms the end user has to select from when filling out this property.
- **Multiple:** Decides whether multiple choice should be allowed. (Note! Make sure the user profile property supports multi choice.)
- **Read only:** Decides whether the property should be editable or not. A read-only property can be used to show a certain value for the end user without having the possibility to change it. It is preferably used in combination with “Allow feedback”.
- **Allow feedback:** If this checkbox is selected, a small feedback icon will appear next to the property and the end user can send feedback to a central location (set in the main settings) that is responsible for this value in the backend.

1.4.2 People Rollup

Setup People Rollup

1. Go to Omnia Admin > Features.
2. Activate the tenant scoped feature “Omnia Intranet People Rollup Core”.
3. The People Rollup block is now available in quick pages.
4. If you want to add support for the People Rollup legacy web part, go to Omnia Admin > Features and activate the site collection scoped feature “Omnia Intranet People Rollup Web Part”.

Follow these steps to setup a profile property.

5. Go to SharePoint Admin Center > Search > Manage Search Schema.
6. Filter on “RefinableString100”.
7. Edit the property, map it to People:PreferredName and save the property.
8. (Online, it is a bit tricky to get the user profiles reindexed, which is required in order for new properties to appear. You can wait around for a couple of hours, weeks, months or you can check this blog post: <http://www.techmikael.com/2014/12/how-to-trigger-re-indexing-of-user.html>).
9. Go to System > Settings > Search Properties.
10. Add a Search Property.

☒ Preferred Name (Sortable)

Localization

en-US ▼

Display Name

Preferred Name (Sortable)

Default Managed Property

RefinableString100

Retrievable ☐

Refinable ☐

Queryable ☐

Sortable ☒

Sortable Managed Property

Formatting

No format ▼

Category


People ▼

11. This property can now be used to sort on in the People Rollup block.

You can use this control on any page, both legacy pages and Quick Pages, and even in a team site. Use it to display information for one or a number of colleagues. The control can be used for a vast number of applications but some examples are:

- Display contact person for a page or for something else.
- List colleagues working at a particular office.
- List members or owners in a group site.
- Create a people directory.

Here are two examples:




ADELE VANCE


Stockholm

Our Stockholm office is located on Kungsgatan 11.


We are located here



Allan Deyoung
Corporate Security Officer
Department: Operations
+1 262 555 0106



Enrico Cattaneo
Attorney
Department: Legal
+1 205 555 0103



Megan Bowen
Auditor

Business Expertise

- Compliance (1)
- Innovation (1)
- Marketing (1)
- Project Management (2)
- Sales (2)
- Social Media (3)
- Sustainability (1)

Certifications

- Adventrix Leader Level 1 (4)
- Driver license Truck A (2)
- Office 365 (5)

Languages

- Chinese (Mandarin) (4)
- Danish (2)
- English (11)
- French (3)
- German (1)
- Spanish (2)
- Swedish (1)

Training





















- Close the deal (5)
- Excel for budgeting (1)
- Lead generation (4)
- Microsoft CRM (3)
- Office 365 (3)
- Product presentation (4)

Product Skills

- City Bikes (2)
- Helmets (2)
- Kids Bikes (3)
- Mountain Bikes (1)
- Trolleys (2)

Find Colleague

Search

 Adele Vance Retail Manager Retail	 Alex Wilber Marketing Assistant Marketing	 Allan Deyoung IT Admin IT
 Christie Cline Buyer Sales	 Debra Berger Administrative Assistant Executive Management	 Diego Siciliani HR Manager HR
 Emily Braun Budget Analyst Finance	 Enrico Cattaneo Attorney Legal	 Grady Archie Designer R&D
 Henrietta Mueller Developer R&D	 Irvin Sayers Project Manager R&D	 Isaiah Langer Sales Rep Sales
 Johanna Lorenz Senior Engineer Engineering	 Joni Sherman Paralegal Legal	 Jordan Miller Tester Engineering
 Lee Gu Director Manufacturing	 Lidia Holloway Product Manager Engineering	 Lynne Robbins Planner Retail
 Megan Bowen Marketing Manager Marketing	 Miriam Graham Director Sales & Marketing	

<
1
2
>

Settings for the control

The following settings are available:

People Rollup Settings



GENERAL

COLUMNS

QUERY

REFINERS

Query Type

Profile Query



Title

Find Colleague

Default Sort Order

Name



Sort Direction

Ascending



Paging Type

Classic



Page Size

20

No of Pages

10

Total Columns

3



Show Profile Image



Show Search Box

The General tab

On the General tab, the following settings are available:

- **Query Type:** Select type of information to use for the Query (=detailed settings of what to display). You can use fields from user profiles, Sharepoint groups or fields defined in the properties for this site. The latter has to be set up in Omnia Admin by an administrator, using Properties for Content Management. For example: To display a contact person you would most likely use “User Fields On Page”, to display colleagues working at a particular office - “Profile Query”, and to display members in a group site - “Sharepoint Groups”.
- **Title:** Here you can add a title to display at the top of the list.
- **Default Sort Order:** Select sort order. What sort orders are available can differ depending on Query Type chosen.
- **Sort Direction:** Select Ascending or Descending sorting.
- **Paging Type:** Can be “Classic” or “Scroll”. Classic: The result list will be divided into pages based on the Page Size. Scroll: By default, the page will load as many objects that can fit the screen. When the user scrolls down, the number of objects set in Page Size will load.
- **Page Size:** Defines the number of objects to display per list “page”.
- **No of pages:** If a lot of people should shown in one People Rollup, you can set the number of pages to be displayed in the pager. Otherwise the pager will be very wide.
- **Total Columns:** The total number of columns allowed in the People Rollup.
- **Show Profile Image:** Select if the profile photo(s) for the person(s) should be shown.

The Columns tab

Here you decide which property fields to show information from. It can look like this:

People Rollup Settings

×

GENERAL

COLUMNS

QUERY

REFINERS

▼ Add

	Selected Properties	Style	Show Label
×	Job Title	Dark Contrast ▼	<input type="checkbox"/>
×	Department	Dark Contrast ▼	<input type="checkbox"/>
×	Work Email	Mail icon ▼	<input type="checkbox"/>

The properties you can choose from are those defined by an administrator for Content Management, for this site.

1. Start by adding fields.
2. Then select which style to use and whether to show a label or not, for each field selected, under “Selected Properties”.

The Query tab

What you can do here depends on which Query Type you select on the General tab.

If you selected “Profile Query”, do the following:

1. Select settings for the query, and click “Add filter”.

Here’s an example of a query for displaying colleagues at the Stockholm office. You can see the actual query in the field below, which was added when clicking “Add filter”.

People Rollup Settings

×

GENERAL

COLUMNS

QUERY

REFINERS

▼

▼

▼

Query Text

{Property.Office}={QueryString.Stockholm}

⌵

Note for advanced users: You can use all search related options here in the Query field.

If you selected “Sharepoint groups” as Query Type, select a group from the list and click “Add group”. If available, you can add more than one group this way.

People Rollup Settings

×

GENERAL

COLUMNS

QUERY

REFINERS

▼

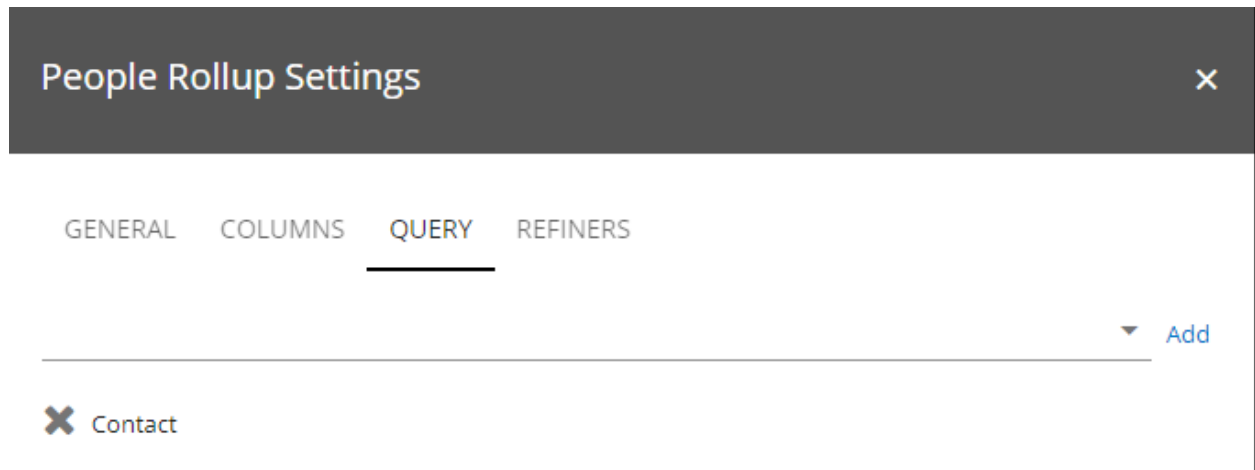
Add

✕ Barcelona Conference 2018 Members

✕ Barcelona Conference 2018 Owners

Note! You must select the field even if there should be only one field available.

If you selected “User fields On Page” as Query Type, select a field from the list and click “Add field”. If available, you can select any number of fields this way.



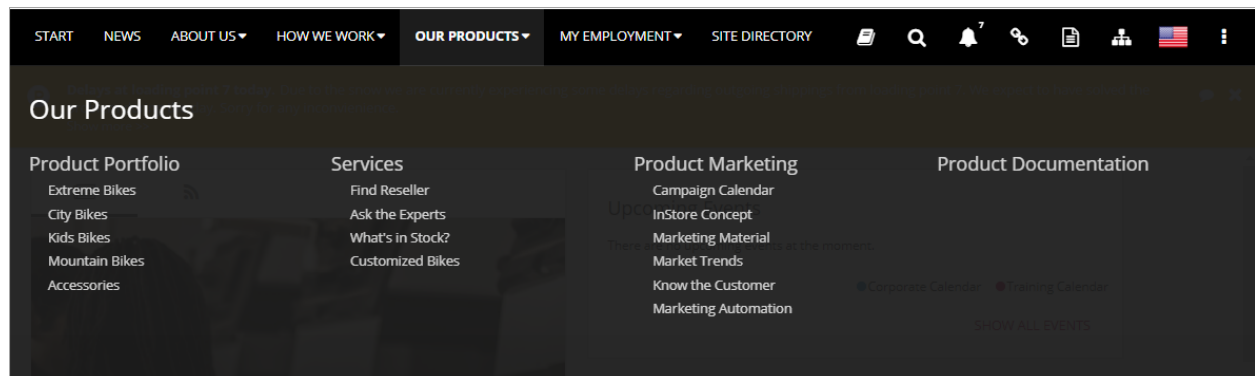
Note! You must select the field even if there should be only one field available.

1.5 Web Content Management

1.5.1 Navigation

Megamenu

The Cross Sites Mega Menu control makes it possible for the end user to navigate to any page in the navigation structure. It is displayed across all Sharepoint sites in Omnia.



Settings

The following settings are available for the control:

Cross Site Mega Menu

GENERAL

CUSTOM COLORS

Static Display Levels

2

Dynamic Display Levels

2

Enable Auto Arrange

Disable to manually set the maximum number of columns and sort nodes according to Manage Content.

Mega menu maximum height

Mega menu maximum width

☐ Show mobile parent siblings

☐ Allow external users

SAVE

CANCEL

The General tab

On this tab you can set the following:

- **Static Display Levels:** Defines the number of levels in the navigation term set that will always be displayed in the menu.
- **Dynamic Display Levels:** Defines the number of levels in the navigation term set that should be displayed in the mega menu when a user clicks an item in the static menu.
- **Enable Auto Arrange:** The columns in the mega menu can be sorted automatically (default) or the same way as shown in the navigation when you edit pages. If you would like the latter, deselect this option.
- **Maximum number of columns:** Set the number of columns to be shown in each “row” of the menu. Available only when the option above is turned off.
- **Mega menu maximum height and width:** Here you can set a specific height and width for the navigation flyout area.
- **Show mobile parents siblings:** To save space in a mobile environment, this option can be used to select not to show the sub options (siblings) to the main heading (parent).
- **Allow external users:** If the mega menu should be displayed for external users as well, this option must be selected. Otherwise external users may experience a CTD.

The Cross Sites Mega Menu settings are master page scoped. All sites using this master page will inherit the settings.

The Custom Colors tab

You should primarily set colors through Theme colors in Omnia Admin (System/Settings/Default colors). If you still would like custom colors for the control, you can set them using this tab.

Cross Site Mega Menu ×

GENERAL CUSTOM COLORS

Background Color

#1d1d1d

×

Selected Background Color

rgba(29,29,29,0.95)

×

Text Color

#FEFEFE

×

Selected Text Color

#fff

×

Selected Border Color

#212121

×

Mobile Navigation Icon Color

#FEFEFE

×

SAVE

CANCEL

Breadcrumb

The breadcrumb control makes it possible for end user to navigate to any parent node of the current page in the navigation structure.

For physical pages, that is not part of the navigation structure (for example news articles), it will show the welcome page of the current publishing sites as the parent node.

Start > About Us > Where do we come from? > Our Milestones

The breadcrumb control has no settings.

Current Navigation

The current navigation control makes it possible for the end user to navigate to siblings, parent nodes and parent node siblings. The control is part of page layouts using left-hand-side navigation.

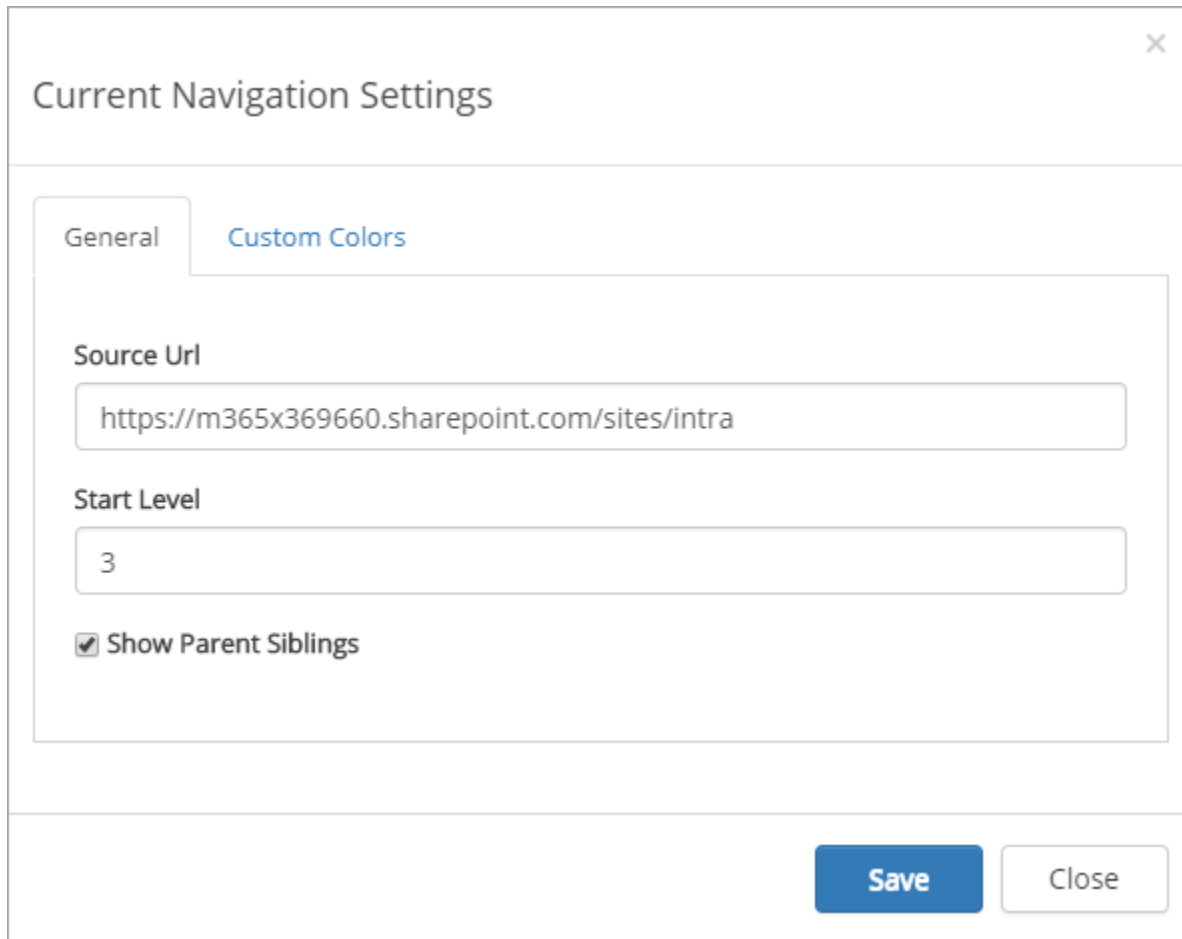
PRODUCT PORTFOLIO	^
EXTREME BIKES	▼
CITY BIKES	▼
KIDS BIKES	▼
MOUNTAIN BIKES	▼
ACCESSORIES	▼
SERVICES	▼
PRODUCT MARKETING	▼
PRODUCT DOCUMENTATION	

The current navigation settings are page layout scoped. The settings are valid for a specific page layout within the current site collection.

The current navigation is responsive. In a certain width (optimized for mobile phones and tablets) the current navigation will be hidden. The mobile navigation will then be used instead.

The settings

These settings are available:.



Current Navigation Settings

General Custom Colors

Source Url

https://m365x369660.sharepoint.com/sites/intra

Start Level

3

☒ Show Parent Siblings

Save Close

The General tab

On this tab you can set the following:

- **Source Url:** The current navigation will be based on the navigation settings that is used on the site of the source url.
- **Start Level:** The current navigation will start on a specific level in the navigation structure. 1 = Start, 2 = Second level, 3= Third level etc. The default value is 3.
- **Show parent siblings:** To always show all main nodes, select this setting. If not selected, only the current node is shown.

Here are two examples. First WITH Show parent siblings selected:



This is how the same current navigation will look with Show parent sibling NOT selected:



The Custom Colors tab

You should primarily set colors through Theme colors in Omnia Admin (System/Settings/Default colors). If you still would like custom colors for the control, you can set them using this tab.

×

Current Navigation Settings

General

Custom Colors

Border Color

Text Color

Background Color

Active Text Color

Active Background Color

Hover Text Color

Hover Background Color

Save

Close



1.5.2 Web Pages

Setup Publishing Site

Follow these steps to setup a publishing portal with basic Omnia features activated.

1. Go to SharePoint admin center.
2. Create a new site collection based on the Publishing Portal template.

new site collection

Title	<input type="text" value="Start"/>
Web Site Address	<input type="text" value="https://m365x263105.sharepoint.com"/> ▼ <input type="text" value="/sites/"/> ▼ <input type="text" value="intra"/>
Template Selection	<p>2013 experience version will be used</p> <p>Select a language:</p> <p><input type="text" value="English"/> ▼</p> <p>Select a template:</p> <div> <div>Collaboration Enterprise Publishing Custom</div> <div> Publishing Portal Enterprise Wiki </div> </div> <p>A starter site hierarchy for an Internet-facing site or a large intranet portal. This site can be customized easily with distinctive branding. It includes a home page, a sample press releases subsite, a Search Center, and a login page. Typically, this site has many more readers than contributors, and it is used to publish Web pages with approval workflows.</p>
Time Zone	<input type="text" value="(UTC+01:00) Amsterdam, Berlin, Bern, Rome, Stockholm, Vienn:"/> ▼
Administrator	<input type="text" value="MOD Administrator;"/>  
Server Resource Quota	<input type="text" value="300"/> resources of 5300 resources available

- Go to the start page of the newly created site collection.
- Go to Omnia Admin > Features.
- Makes sure that the following tenant scoped features are activated:
 - Omnia Glue Core
 - Omnia Intranet Core
 - Omnia Intranet Content Management Core
 - Omnia Intranet Navigation Core
 - Omnia Intranet Social Core
 - Omnia Statistics Provider Core
- Navigate to Omnia Profiles and add a new profile for the intranet.

Omnia Profiles » + Add Omnia Profile

Title
Intranet

Description
This is the main publishing site in the tenant.

Profile Site Collection Url
https://m365x811225.sharepoint.com/sites/intra

Create

7. Click on Default Mapping and select “Intranet” and click save.
8. Navigate to Features.
9. Activate the following Site Collection scoped features:
 - Omnia Core Master Page
 - Omnia Core Image Renditions
 - Omnia Intranet Content Management
 - Omnia Intranet Content Types
 - Omnia Intranet Page Layouts
 - Omnia Start Page Layout
 - Omnia Intranet Web Statistics
10. Activate the following Site scoped feature “Omnia Glue Site”.
11. Go back to the start page and Site Settings > Master pages and page layouts.
12. Find OmniaStartPage.aspx, edit properties and change the Associated Content Type to Web Page.

Associated Content Type

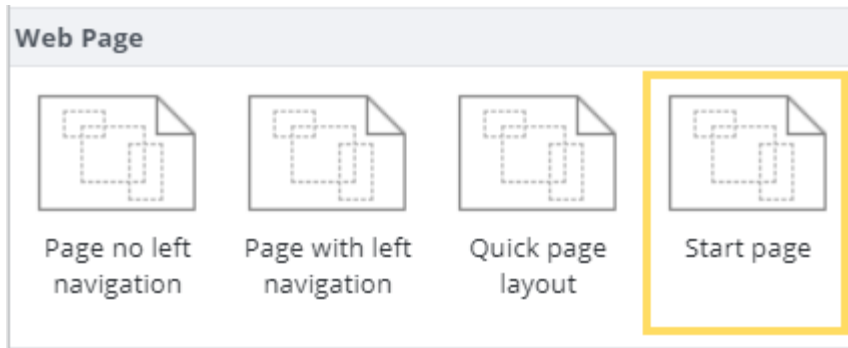
Content Type Group

Omnia Content Types ▼

Content Type Name

Web Page ▼

13. Publish a new major version of the page layout OmniaStartPage.aspx.
14. Go back to the start page and change the page layout to “Start page”.



15. Delete all out of the box web parts from the page and publish it.
16. Go to “Site Settings” > “Page layouts and site templates”.
17. Limit the available page layouts according to the below.

☐ Pages inherit preferred layouts from parent site
☐ Pages in this site can use any layout
☒ Pages in this site can only use the following layouts:

(Article Page) Body only (Article Page) Image on left (Article Page) Image on right (Article Page) Summary links (Catalog-Item Reuse) Blank Catalog Item (Catalog-Item Reuse) Catalog Item Image on (Enterprise Wiki Page) Basic Page (Error Page) Error (Project Page) Basic Project Page	Add > < Remove	(Web Page) Page no left navigation (Web Page) Page with left navigation (Web Page) Start page
--	-------------------	---

☐ Reset all subsites to inherit these preferred page layout settings

☐ Inherit default page layout from parent site
☒ Select the default page layout:

(Web Page) Page no left navigation (Web Page) Page with left navigation (Web Page) Start page

18. Go back into “Page layouts and site templates”, select “Page with left navigation” as default page layout, and click on OK.

Follow these steps to setup quick pages in the publishing portal.

19. Go to Omnia Admin > Content Management.
20. Click on Enable Quick Pages.
21. Select “Yes” and click save.
22. Go to the start page and temporarily change the SharePoint page layout to “Page no left navigation”.
23. Open Manage Content and click on the Start node.
24. Uncheck “Enable legacy web parts” and save the page.
25. Go to the start page again, switch the SharePoint page layout back to “Start page”, and publish the page.
26. Go to Site Settings > Welcome Page.
27. Change the welcome page so that it points to Omnia.aspx that is located in the root pages library.

Site Settings › Site Welcome Page ⓘ

Welcome Page
Select the page to be used as the welcome page for this site.

Welcome Page:

(Note! It may take some time for the SharePoint cache to release the old welcome page. Now is a good time to get a coffee before you continue.)

Follow these steps to setup basic page properties in the publishing site.

28. Go to the start page of the main publishing site.
29. Go to Omnia Admin > Content Management > Page Properties.
30. Add the page properties that you would like to show on web pages in the publishing site.

Content Management › Page Properties

Page Properties: [Start](#) ⓘ

Property	Edit mode	Group permission	View mode	Show more	Shared	Show label	Required	Display Type
Contact	<input checked="" type="checkbox"/>	<input type="text"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Image with Link Text ▼
Modified	<input type="checkbox"/>	<input type="text"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Text ▼
Title	<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Text ▼

Follow these steps to set up review and content management reports.

31. Go to the start page of the main publishing site.
32. Go to the Site Settings > Site Columns.
33. Edit the Review Date:
 - Change to Date and Time Format to “Date Only”.
 - Set the Default value to “[Today] + 365”.

Date and Time Format:

☒ Date Only ☐ Date & Time

Display Format:

☒ Standard ☐ Friendly

Default value:

☐ (None)

☐ Today's Date

☐ 12 AM ▼ 00 ▼

Enter date in M/D/YYYY format.

☒ Calculated Value:

34. Go to Omnia Admin > Content Management > Page Properties.
35. Check the box to show the property Review Date in Edit mode and save.
36. Go back to the start page of the main publishing site.
37. Open Manage Content and create and publish a new page.
38. Now it is a good time to grab a coffee, because the search engine needs to crawl this page.
39. Go to SharePoint Admin Center > Search > Manage Search Schema.
40. Map the managed property RefinableDate05 to ows_q_DATE_OMIReviewDate.
41. Map the managed property RefinableString50 to ows_Title, TermTitle and (Category:Office)2.

☒ Include content from all crawled properties

☐ Include content from the first crawled property that is not

ows_Title
TermTitle
Office:2

42. Go back to the main publishing portal.
43. Go to Site contents > Pages library settings > Advanced settings.
44. Click on “Reindex Document Library” and click OK.

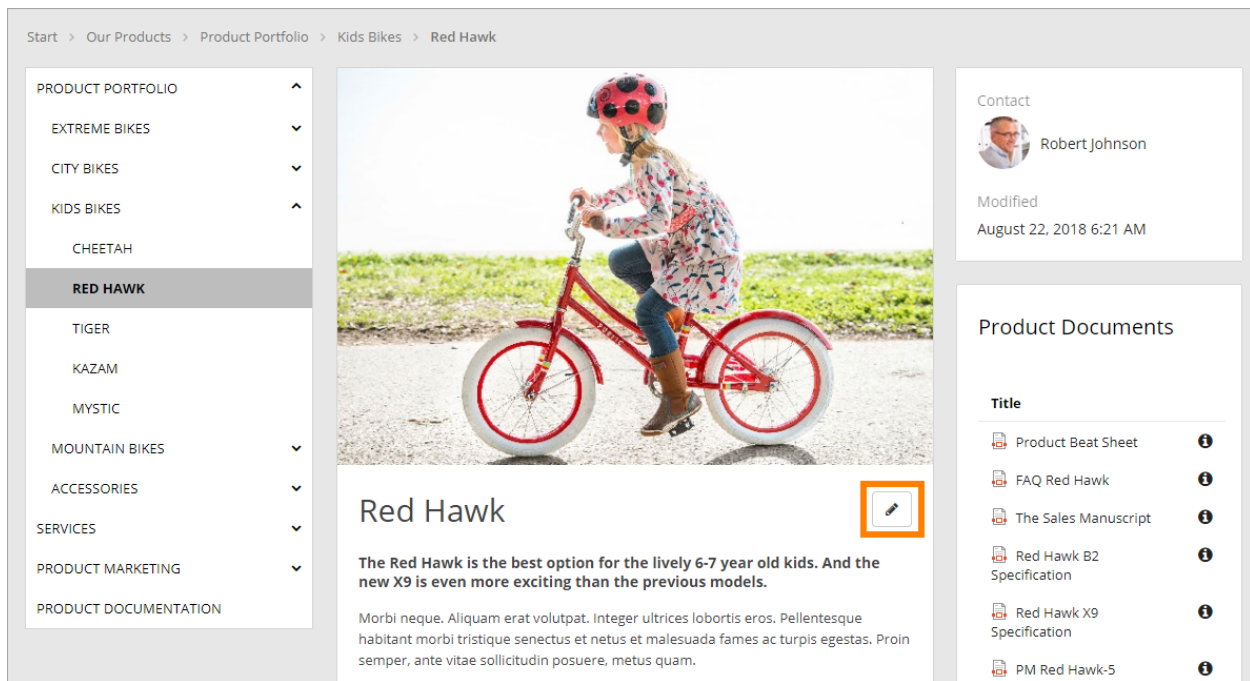
45. Go to Omnia Admin > Content Management > Web Report Settings.
46. Set “Managed Property For Review Date” to RefinableDate05.
47. Set “Managed Property For Title” to RefinableString50.

Manage Content

In Omnia there are two different ways of editing publishing pages: The Sharepoint way and the Omnia way (Quick Edit). The Omnia Quick Edit makes it a lot easier for an editor to edit an existing page, and to create, move and remove pages. In this chapter the Quick Edit option will be described.

Omnia Quick Edit can be started for a publishing page this way:

- Browse to a web page and click on the Quick Edit icon next to the page title.



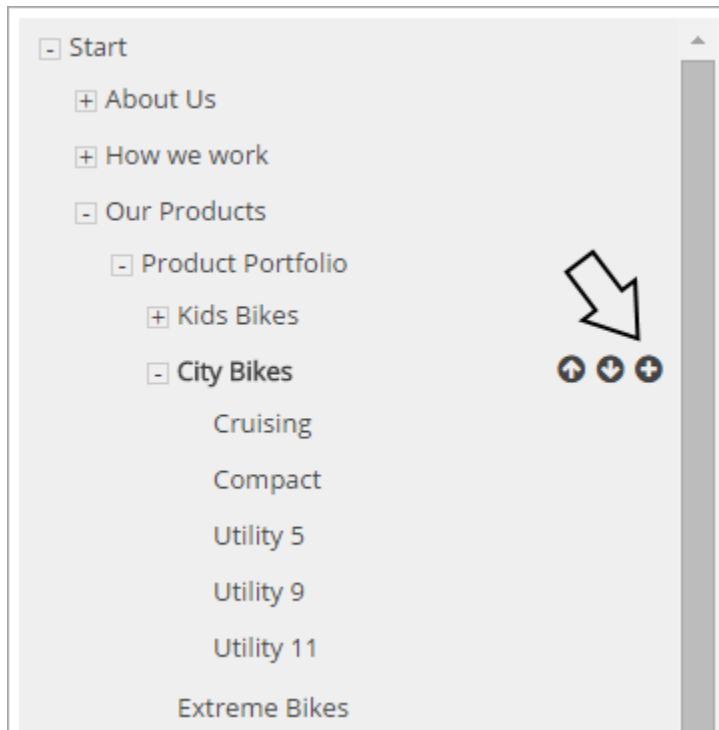
The Quick Edit button is always available for any user that has permissions to edit a certain page. No need to select to edit the page in the Action Menu.

When the icon is used to open Quick Edit for a page, that page is automatically checked out, which means no other editor can edit that page until it's published.

Tip: If you just would like to have a look at the settings for a page, without checking out, open the Settings menu (the cogwheel) and select “Manage Content”, to open the Quick edit.

Add Page

To add a new page in the navigation structure, browse to the location where you want to add the page and click on the plus icon.



A dialog will now open. You are able to create a new page in three different ways:

- Add simple page
- Add page and break permission inheritance (advanced settings)
- Add link to page

Add simple page

When you choose to add a simple page, the following is shown:

Add Page

☒ Create Page

☐ Add Link to Page

Title

Utility 13

/start/products/product-portfolio/city-bikes/utility-13

Page Layout

(Web Page) Page with left navigation

Advanced Settings

Create

Cancel

- **Title:** The title will be used in the current navigation and as the heading for the page.
- **Page layout:** Select one of the page layouts available. (If there is only one Page Layout available, it will be preselected.)

For a “simple” page, no more settings are needed.

Advanced settings

To add a page and break permission inheritance, you use the advanced settings. This is useful for example if a number of publishing pages should be edited by another group of editors, or if a number of pages should have other properties. An example could be that a publishing site contains product information that just certain editors should have permission to edit, or that just dedicated editors should have permission to edit pages with HR information. Such pages could also very well need other properties.

Add Page

☒ Create Page

☐ Add Link to Page

Title

Utility 13

/start/products/product-portfolio/city-bikes/utility-13

Page Layout

(Web Page) Page with left navigation

Publishing Site

☐ Current Site

☒ Create New Site

Title

Utility 13 Team

Url

/publishing-utility-13-team

Editors

☐ Approvers

☒ Create New Group Utility 13 Editors

Create

Cancel

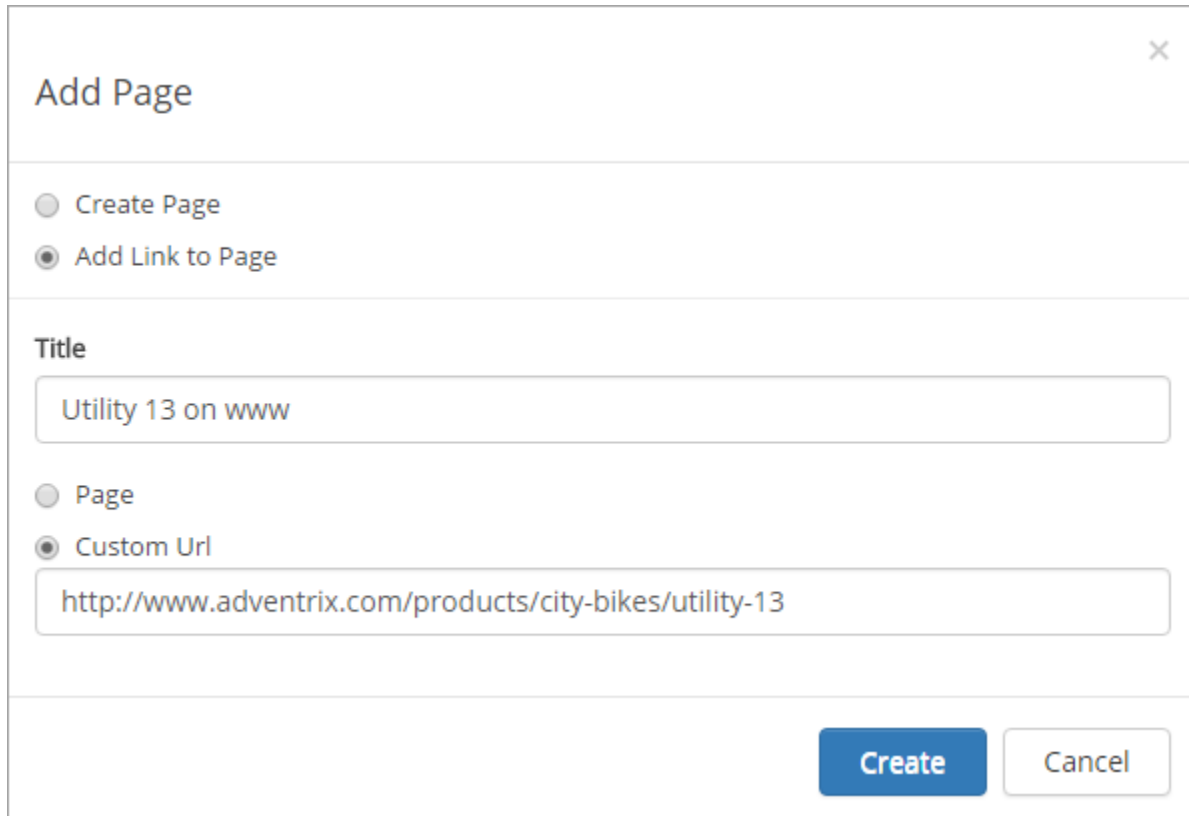
- **Publishing site:** Select which site to place the page in.
- **Create new site:** Select to create a new publishing site, to place the page in. A number of options are displayed. Add a title, a Url (The system will automatically add the prefix /publishing-). Then select an existing SharePoint

permission group for editors, or create a new group. If you create a new group, you need to go to the new page and add editors to the permission group.

If you create a new site, separate libraries and other resources will automatically be created for that site, for example a Documents library and an Image library.

Add link to page

If you want to structure the navigation some special way, or if you want to add links to pages in other places in the publishing site for easy access, use “Add link to page”.



Add Page [X]

☐ Create Page
☒ Add Link to Page

Title
Utility 13 on www

☐ Page
☒ Custom Url
http://www.adventrix.com/products/city-bikes/utility-13

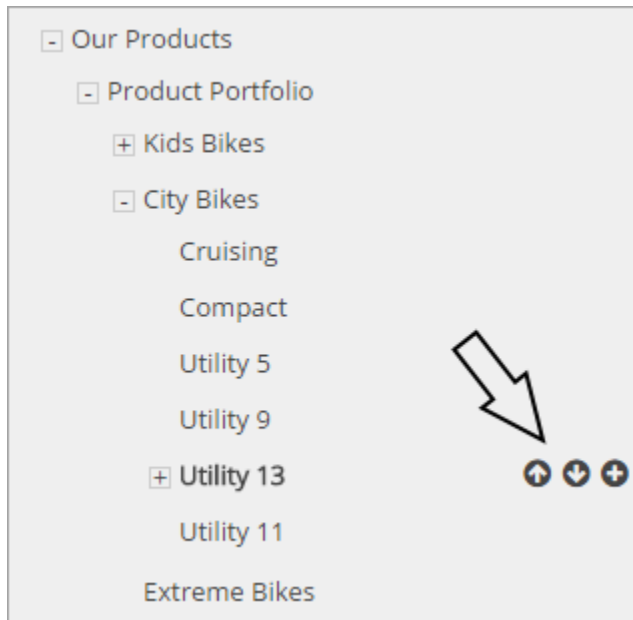
Create **Cancel**

- **Title:** The title will be used in the current navigation.
- **Page:** Select to add a link to a page that already exists in the navigation structure, then browse to the page.
- **Custom Url:** Select to add a link that is not in the navigation structure. You have to manually add the Url.

A new navigation term will now be created that will either point to an existing physical page in the system (term-driven page) or point to a static link.

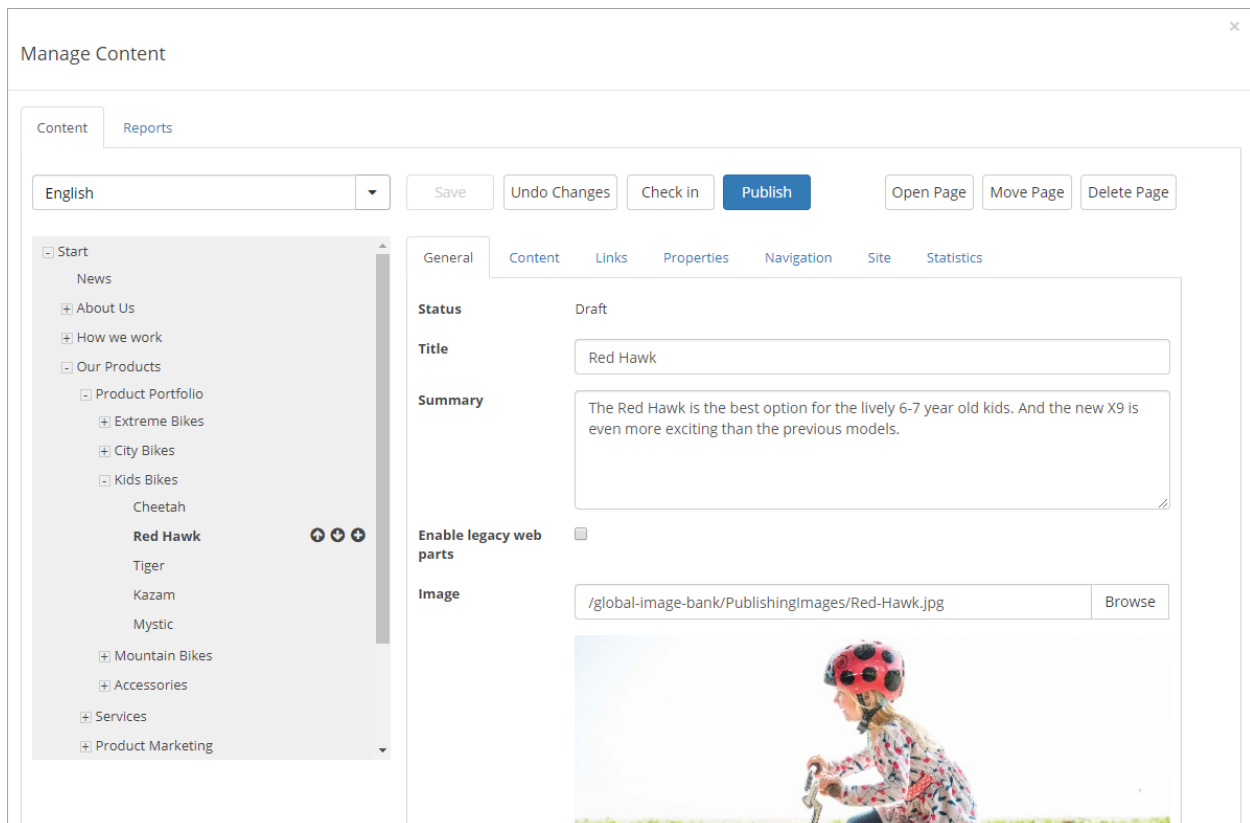
Sort Page

Use the up and down arrows to decide the internal sort order of the pages in the navigation.



General Tab

The general tab has three fields:

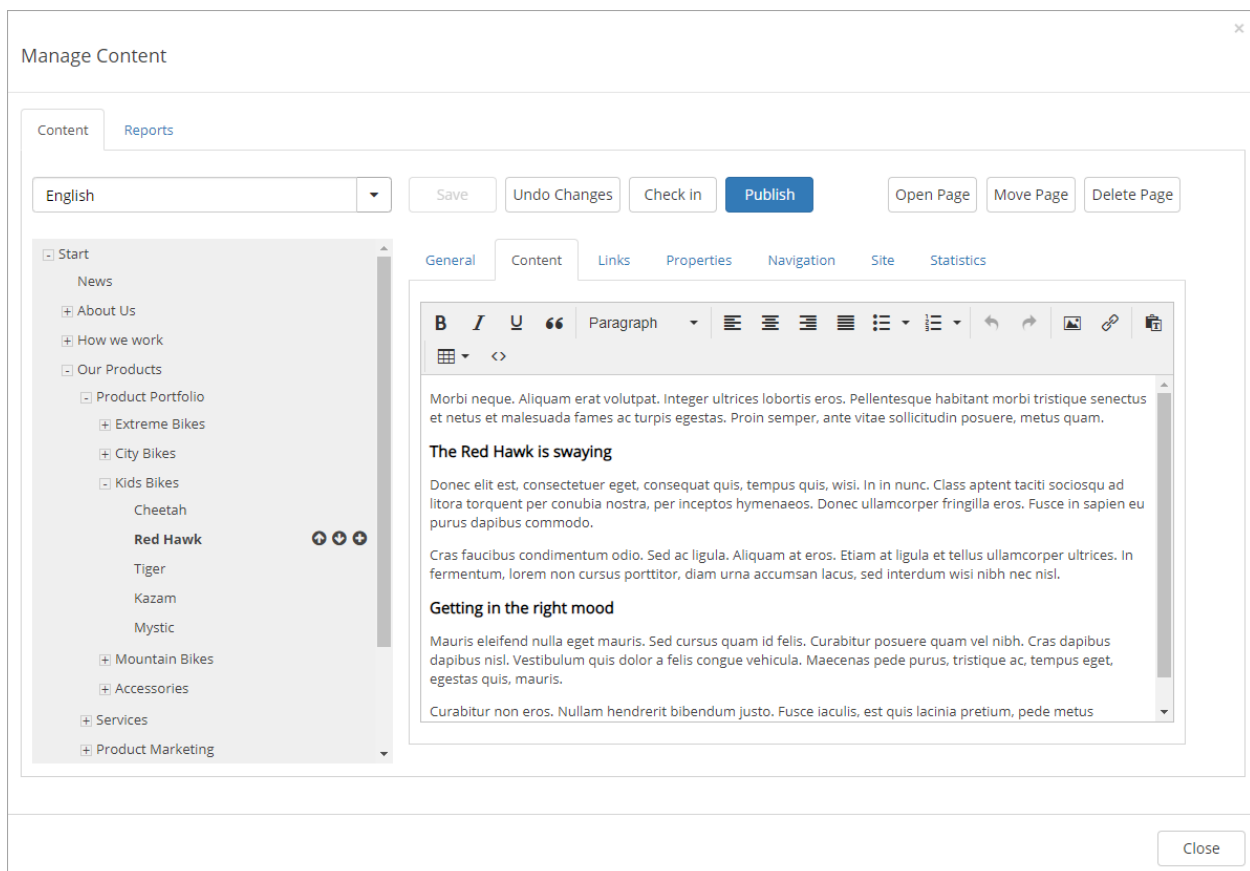


- **Status:** At the top of the page you can see the status of this particular version of the page. If it says “draft”, this version is not published, and therefore not available for others.

- **Title:** This is a required field and sets the title of the page. (If this is a term-driven page it will set the term title. If it is a physical page, it will set the Title field of the aspx page.)
- **Summary:** This text will be shown below the title on the page. (If this is a term-driven page, it will set the term description. If it is a physical page, it will set the Comments field on the aspx page.)
- **Enable legacy web parts** If Quick Pages is activated, this check box is displayed. Quick Pages loads much, much faster, but legacy web parts can't be used on such pages. If you are about to add a banner or a quick poll to a page, you must see to that this check box is checked.
- **Image:** Browse for an image using the built-in asset picker in SharePoint or enter a url to an external image. The image will be shown on top of the page. Leave blank, if the title should appear on top instead. If the image is internal (stored in the current site collection), a link will appear with the possibility to edit image renditions. Note! The system will automatically add "?RenditionID=1001" to the url when you pick an image using the Browse button. Remove this query string if you want to render the image in original format.

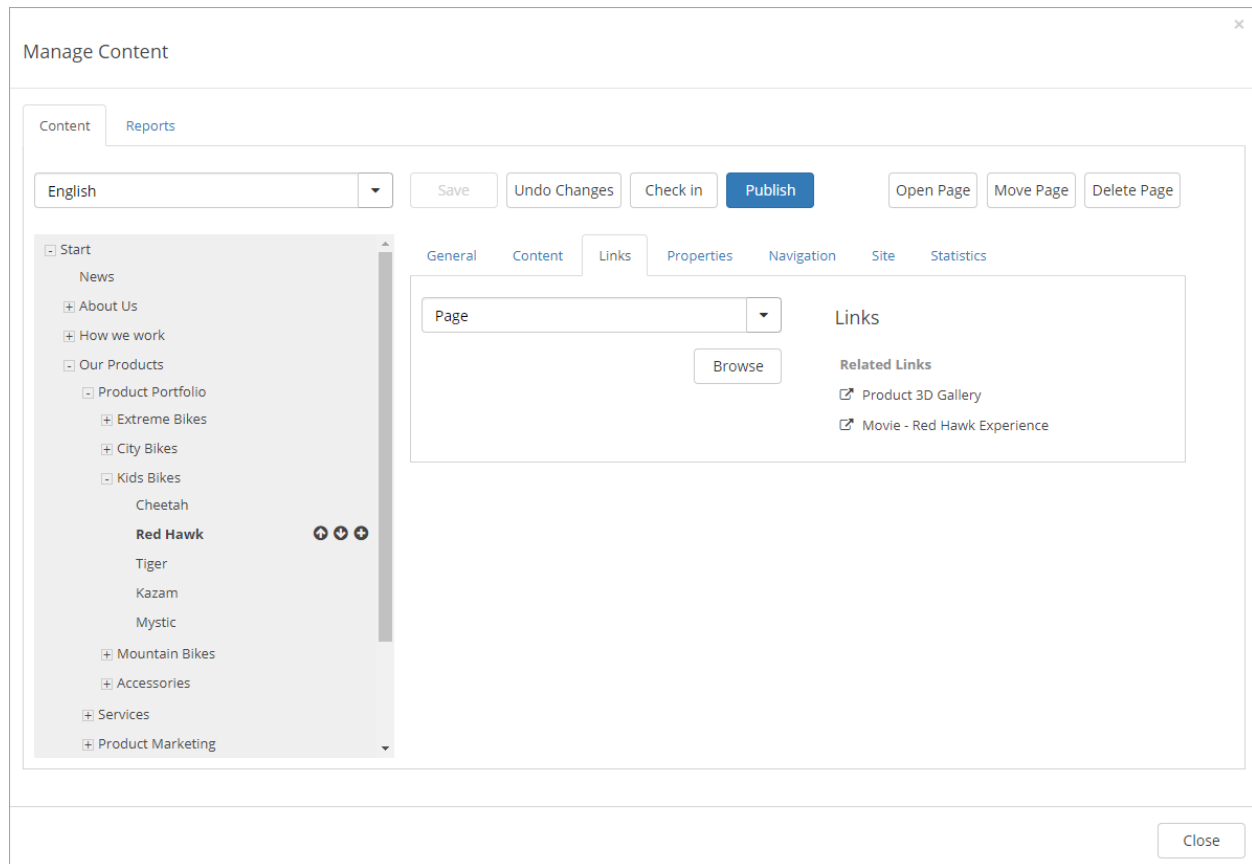
Content Tab

The content tab includes a content editor based on [TinyMCE] (<https://www.tinymce.com>). Click "Edit in Advanced Mode" to use SharePoint content editing instead. Note! If Quick Pages has been activated, Advanced mode is not available. "Edit in Advanced Mode" is missing from the image for that reason.



Links Tab

Using the links tab you can create structured links that will appear on the right-hand side of a page.



Four different types of items can be added to the list of links:

- Page
- Document
- Custom Link
- Heading

A custom link can be created to anything you can reach through an Url. A Custom link can also be used to create a mailto link. Headings are use to create sections in a longer link list.

Sort the links

You can sort the links and headings in the list by using drag and drop.

Edit links

You can edit any item in the list by selecting it in the list.

“Related links” in this image is an example of how a links list can look when the page is published:

MYSTIC


MOUNTAIN BIKES

ACCESSORIES

SERVICES

PRODUCT MARKETING

PRODUCT DOCUMENTATION



Red Hawk

The Red Hawk is the best option for the lively 6-7 year old kids. And the new X9 is even more exciting than the previous models.

Morbi neque. Aliquam erat volutpat. Integer ultrices lobortis eros. Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas. Proin semper, ante vitae sollicitudin posuere, metus quam.

The Red Hawk is swaying

Donec elit est. consectetur eget, consequat quis, tempus quis, wisi. In in nunc. Class aptent taciti sociosqu ad litora torquent per conubia nostra, per inceptos hymenaeos. Donec ullamcorper fringilla eros. Fusce in sapien eu purus dapibus commodo.

Cras faucibus condimentum odio. Sed ac ligula. Aliquam at eros. Etiam at ligula et tellus ullamcorper ultrices. In fermentum, lorem non cursus porttitor, diam urna accumsan lacus, sed interdum wisi nibh nec nisl.

Getting in the right mood

Mauris eleifend nulla eget mauris. Sed cursus quam id felis. Curabitur posuere quam vel nibh. Cras dapibus dapibus nisl. Vestibulum quis dolor a felis congue vehicula. Maecenas pede purus, tristique ac, tempus eget, egestas quis, mauris.

Curabitur non eros. Nullam hendrerit bibendum justo. Fusce iaculis, est quis lacinia pretium, pede metus molestie lacus, at gravida wisi ante at libero.

Title

Product Beat Sheet

FAQ Red Hawk

The Sales Manuscript

Red Hawk B2 Specification

Red Hawk X9 Specification

PM Red Hawk-5

Press Release for Model X

PM Red Hawk

About our digital workpla...

23 1

Related Links

Product 3D Gallery

Movie - Red Hawk Experience

Properties Tab

The properties tab displays all page properties that have been configured as editable for the current publishing site. The available properties are configured by an administrator using Omnia Admin.

Manage Content

Content

Reports

English

Save

Undo Changes

Check in

Publish

Open Page

Move Page

Delete Page

Start

News

About Us

How we work

Our Products

Product Portfolio

Extreme Bikes

City Bikes

Kids Bikes

Cheetah

Red Hawk

Tiger

Kazam

Mystic

Mountain Bikes

Accessories

Services

Product Marketing

General

Content

Links

Properties

Navigation

Site

Statistics

Contact

Robert Johnson x

Review Date

2018-06-29

Enterprise Keywords

Close

Note! If the field “Review Date” is present, you should normally add a suitable date there. Then the page will be indicated in “Content Management” in Omnia Admin, when the date is passed.

Navigation Tab

The navigation tab includes all settings related to navigation for the page.

Manage Content

Content Reports

English Save Undo Changes Check in Publish Open Page Move Page Delete Page

Start

- News
- About Us
- How we work
- Our Products
 - Product Portfolio
 - Extreme Bikes
 - City Bikes
 - Kids Bikes
 - Cheetah
 - Red Hawk**
 - Tiger
 - Kazam
 - Mystic
 - Mountain Bikes
 - Accessories
 - Services
 - Product Marketing

General Content Links Properties Navigation Site Statistics

Navigation Term Title Red Hawk Customize

Friendly Url Segment red-hawk

Navigation Hover Text

Visibility in Menus

- ☒ Show in Global Navigation Menu
- ☒ Show in Current Navigation Menu

Close

- **Navigation Term title:** By default, the navigation title will be the same as the page title, but it is possible to customize the navigation title. Check the box “Customize” and then change the title. All navigation components will now display this title instead of the page title.
- **Friendly Url Segment:** The friendly url to the page is built up of segments from all parent nodes in the navigation. The last segment in the url can be edited. By default it is set to the title, but excluding special characters.
- **Navigation Hover Text:** It is also possible to set a hover text. The hover text will appear when the user holds the mouse over the node in the cross-sites-mega-menu and the current navigation.
- **Visibility in menus:** Check “Show in Global Navigation Menu” if you want the navigation node to appear in the mega menu. Check “Show in Current Navigation Menu” if you want the navigation node to appear in current navigation on the left-hand side of the page.

Note! The navigation node will always be visible in the breadcrumb.

Site Tab

The site tab holds information about the current publishing site. It is possible to navigate to the pages library where the physical page is located.

The site permissions part displays all SharePoint groups that have access to the page. Click on “Edit Permissions” to go to the SharePoint UI and add users to the different groups (at the bottom of the page, not shown in the image below).

Manage Content

Content

Reports

English

Save

Undo Changes

Check in

Publish

Open Page

Move Page

Delete Page

Start

News

About Us

How we work

Our Products

Product Portfolio

Extreme Bikes

City Bikes

Kids Bikes

Cheetah

Red Hawk

Tiger

Kazam

Mystic

Mountain Bikes

Accessories

Services

Product Marketing

General

Content

Links

Properties

Navigation

Site

Statistics

Intranet

/Pages/red-hawk.aspx

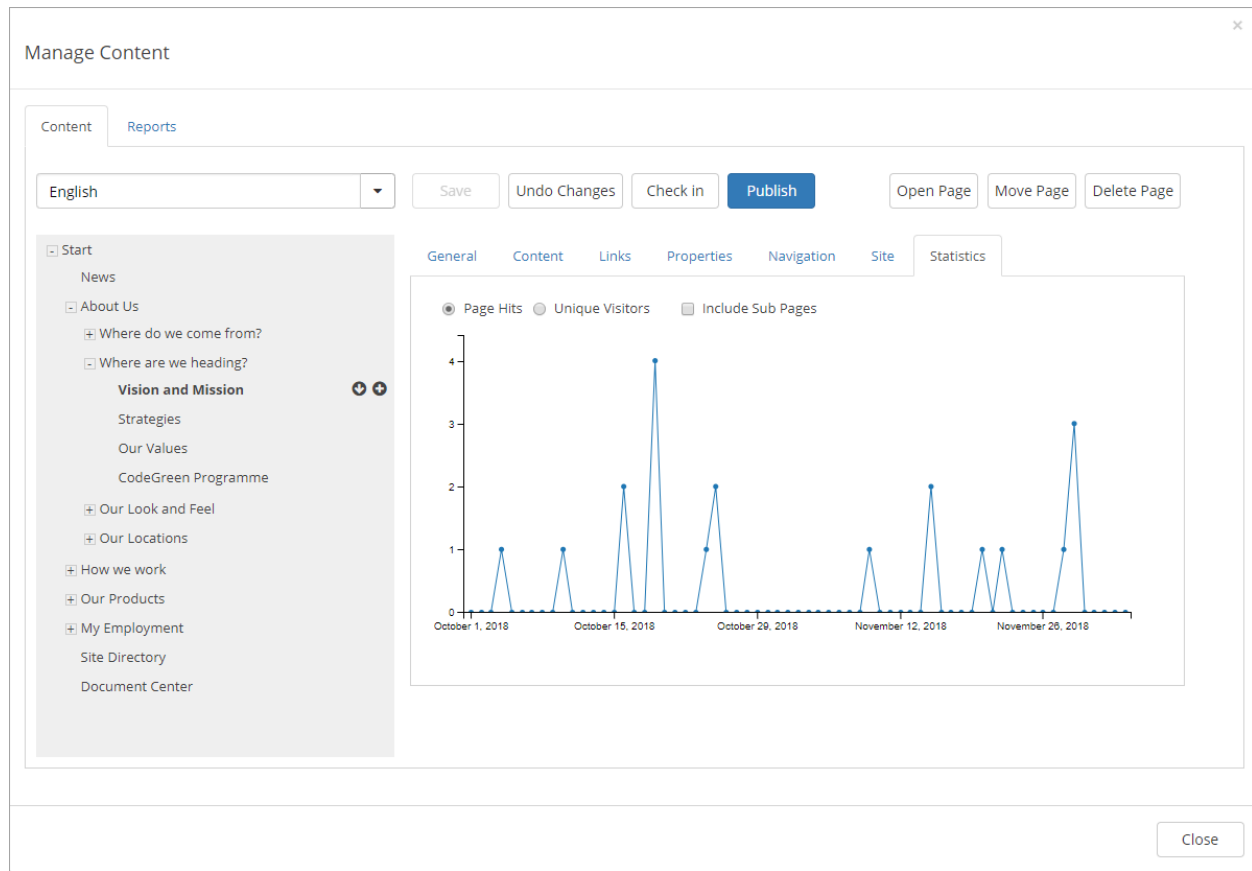
Go to the Pages Library

Site Permissions

Name	Type	Permission Levels
Intranet Owners	SharePointGroup	Full Control, Limited Access
Intranet Visitors	SharePointGroup	Read, Limited Access
Intranet Members	SharePointGroup	Contribute
Robert Johnson	User	Limited Access
Style Resource Readers	SharePointGroup	Limited Access
Designers	SharePointGroup	Design, Limited Access
Hierarchy Managers	SharePointGroup	Limited Access, Manage Hierarchy
Approvers	SharePointGroup	Approve
Restricted Readers	SharePointGroup	Restricted Read

Statistics tab

Using this tab you can see statistics for the page.



Select “Page Hits” or Unique Visitors”. If you select Page Hits you can also select “Include Sub Pages”.

Also see “Reports” below.

Reports

Using this tab you can view and export some reports about publishing pages in the tenant.

Manage Content

Content Reports

English Save Undo Changes Check in Publish Open Page Move Page Delete Page

Start

- News
- About Us
- How we work
- Our Products
 - Product Portfolio
 - Extreme Bikes
 - City Bikes
 - Kids Bikes
 - Cheetah
 - Red Hawk**
 - Tiger
 - Kazam
 - Mystic
 - Mountain Bikes
 - Accessories
 - Services
 - Product Marketing

General Content Links Properties Navigation Site Statistics

Status Draft

Title Red Hawk

Summary The Red Hawk is the best option for the lively 6-7 year old kids. And the new X9 is even more exciting than the previous models.

Enable legacy web parts

Image /global-image-bank/PublishingImages/Red-Hawk.jpg Browse

Something like the following can be shown:

Manage Content

Content Reports

Usage Start Date End Date Type Contact

Page	Contact	Page Hits	Avg. Unique Users	Last Viewed
Start	Robert Johnson	3949	1	April 13, 2020
News Center	SharePoint App	322	1	March 17, 2020
Process	Robert Johnson	307	1	March 26, 2020
About Us	Robert Johnson	284	1	April 9, 2020
Process Directory	Adele Vance	271	1	March 26, 2020
Main Process	Robert Johnson	191	1	March 26, 2020
Where do we come from?	Robert Johnson	164	1	March 17, 2020
It's time to walk the talk	Robert Johnson	140	1	March 23, 2020
Site Directory	Robert Johnson	120	1	April 13, 2020
Vision and Mission	Robert Johnson	112	1	March 11, 2020

1 2 3 4 5

Close

Use the left-most list to select report:

Manage Content

Content Reports

Usage (dropdown menu open)

Start Date End Date Type Contact

Page	Contact	Page Hits	Avg. Unique Users	Last Viewed
Start	Robert Johnson	3949	1	April 13, 2020

- **Usage:** Lists the most viewed pages.
- **Review:** Lists the pages that needs review.
- **Checked Out:** Lists pages checked out by users.

You can use the other fields at the top to filter a list:

Manage Content

Content Reports

Usage (dropdown menu open)

Start Date End Date Type Contact

Page	Contact	Page Hits	Avg. Unique Users	Last Viewed
Start	Robert Johnson	3949	1	April 13, 2020
News Center	SharePoint App	322	1	March 17, 2020

Use the button to the far right to export the chosen list (filtered if you have done that) to Excel.

Manage Content

Content Reports

Usage (dropdown menu open)

Start Date End Date Type Contact

Page	Contact	Page Hits	Avg. Unique Users	Last Viewed
Start	Robert Johnson	3949	1	April 13, 2020
News Center	SharePoint App	322	1	March 17, 2020

If the list is long, use the navigation below the list, the navigate to any page within the report.

Manage Content

Content Reports

Usage (dropdown menu open)

Start Date End Date Type Contact

Page	Contact	Page Hits	Avg. Unique Users	Last Viewed
It's time to walk the talk	Robert Johnson	140	1	March 23, 2020
Site Directory	Robert Johnson	120	1	April 13, 2020
Vision and Mission	Robert Johnson	112	1	March 11, 2020

Navigation: 1 2 3 4 5

Close

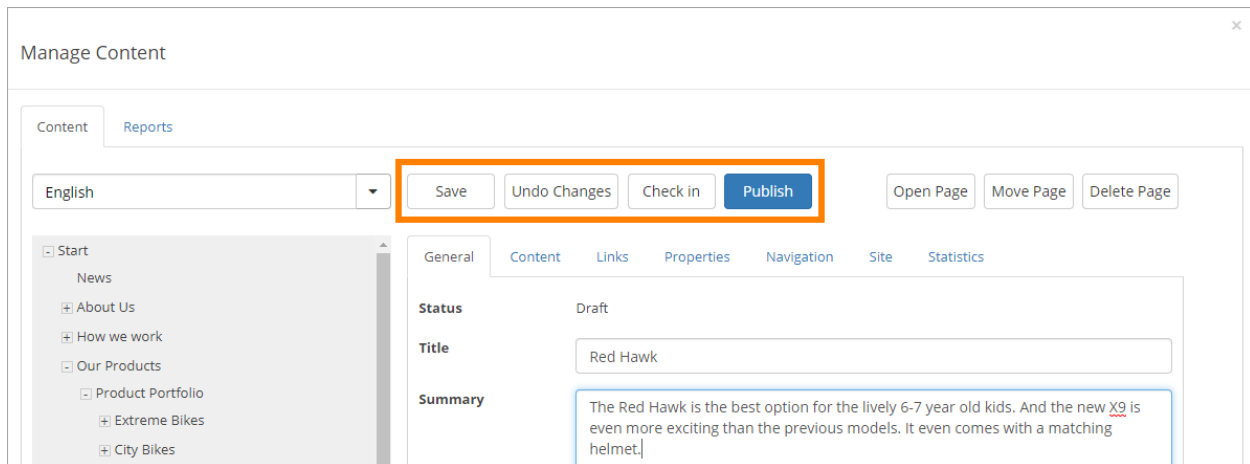
Edit - Save - Check in - Publish

If you open the Manage Content UI by clicking on the “Quick Edit” button on a web page, then it will automatically be checked out and ready for editing.

If you click on a page in the navigation structure in the Manage Content UI and the page is not checked out to you, you need to click on “Edit” to start editing.



The following options are available for saving (or not):

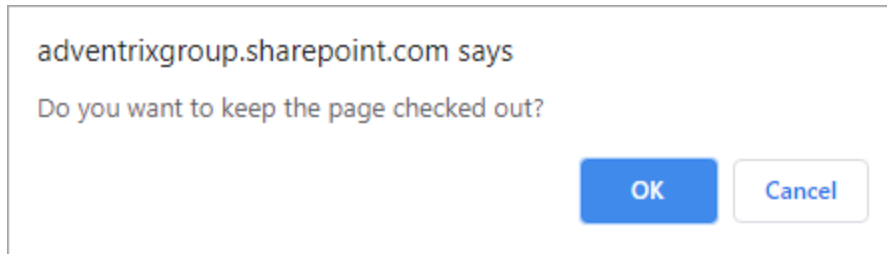


- **Save:** All changes will be saved, but the page will still be checked out to you.
- **Undo Changes:** Any changes made since the last save will be discarded and the page will be checked in.
- **Check in:** All changes will be saved and the page will be checked in so other authors can see the changes.
- **Publish:** The page will be published. Note! The page will not be shown in any navigation components until it has been published at least once.

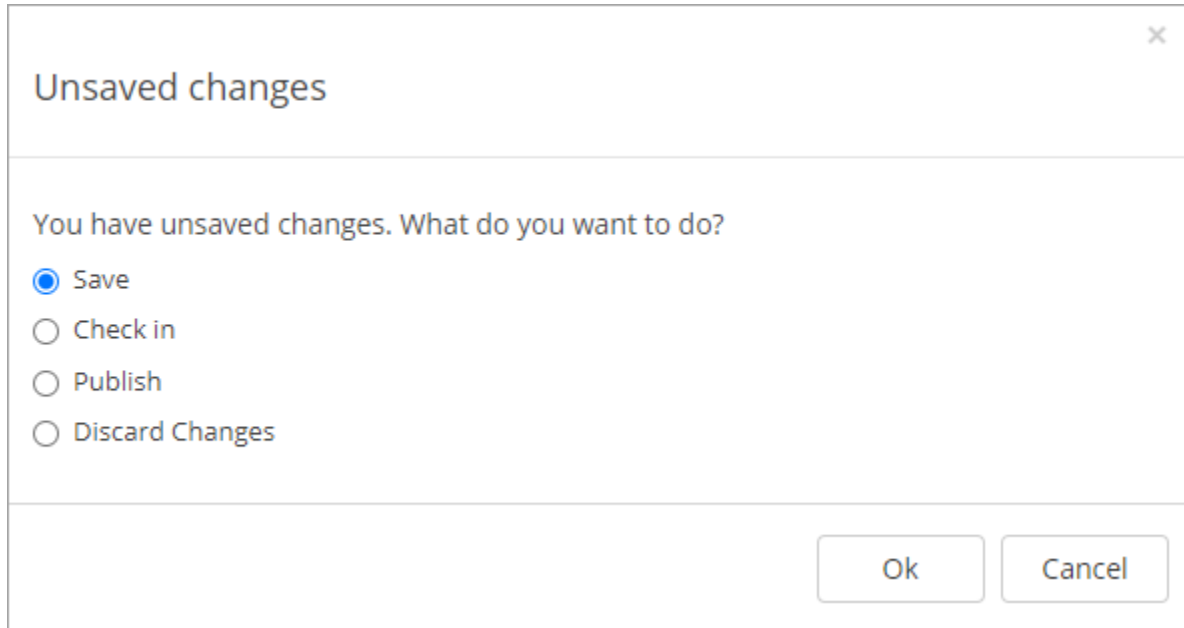
If you want to preview changes before you publish a page, you need to save the changes and then click on “Open Page”. The page will now be opened in a separate tab.

If you forgot to save

If you leave a page you have edited, without having saved the changes, the following message is shown:



You can click “Cancel” to continue editing, and then save the normal way or do any of the other normal actions. When you click “OK” the following is shown:



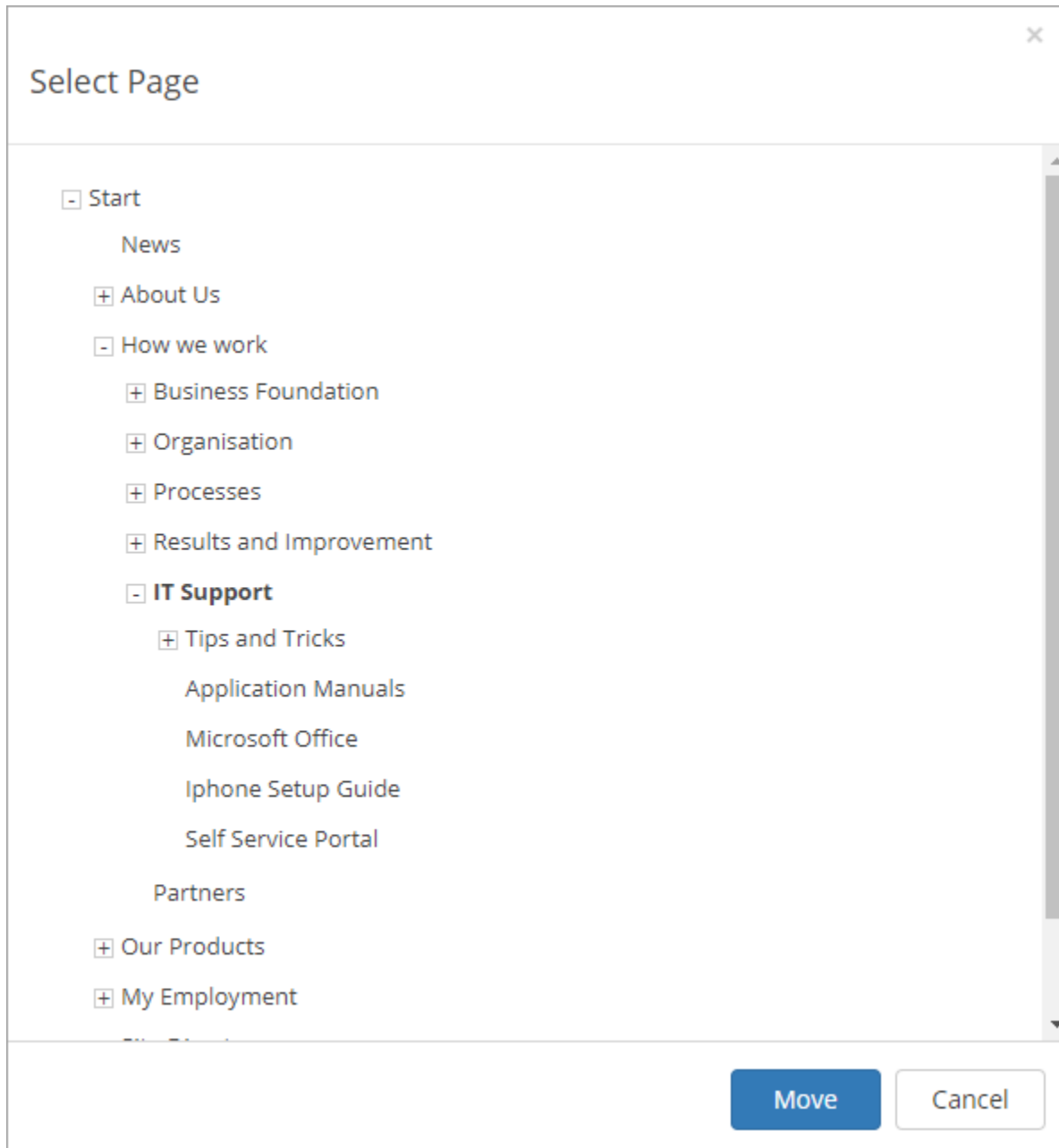
Choose what you want to do and click “OK”.

Move Page

To be able to move a page, it must be checked out, meaning you must edit the page.

If the page has children (sub pages), you move the page and all sub pages in one go.

Click on “Move Page” and select a target parent page.



If the target parent page is in the same publishing site, the page will be moved to the new location without any further options. If the target parent page is in another publishing site, there are two options:

- Keep the physical page in the source publishing site and move the navigation node.
- Move the physical page to the target publishing site.

Delete Page

A prerequisite to be able to delete a page is that it doesn't have any children. Click on "Delete Page" to remove the page together with the navigation node.

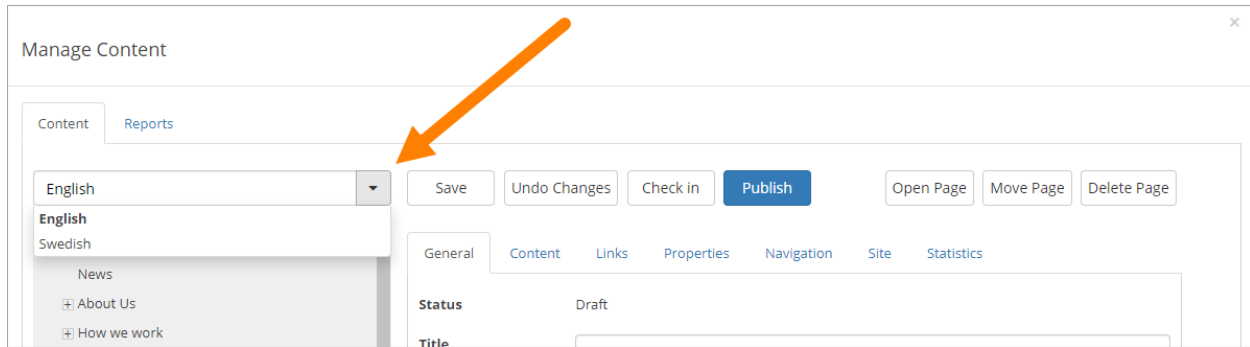
Note! In the scenario where several navigation nodes (terms) point to the same physical page, only the navigation

node will be removed and the physical page will be kept.

Important! A deleted page can not be restored by an editor.

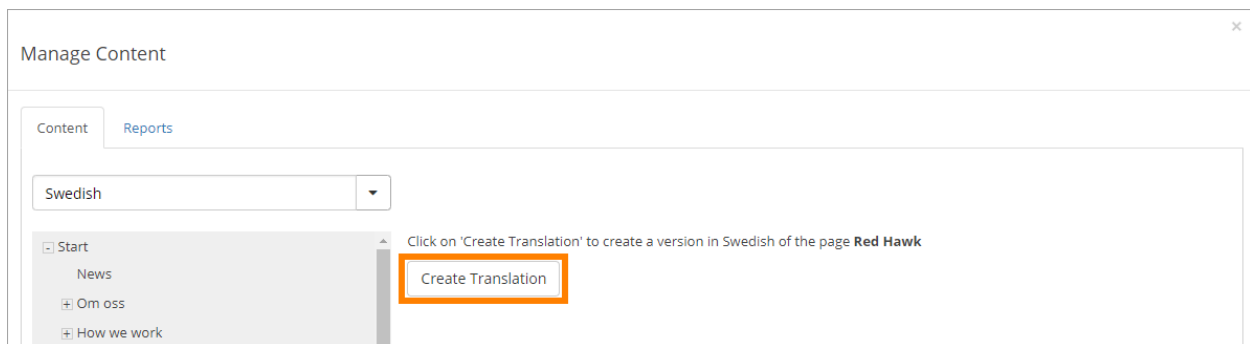
Translations

It may be possible to work with the content in several languages. If it is, you can select language while editing a page:



If the page already exists in the selected language, it is displayed and you can continue working on the content.

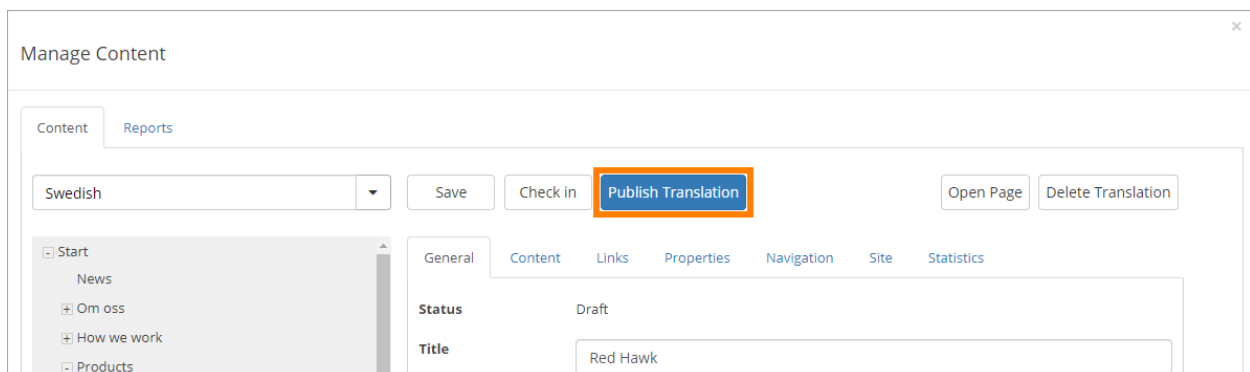
If the page does not exist in the selected language, you have to create it:



When the page is created, and only then, all content from the master language is copied. After that, the language editions of the page are different units, with no connection between them.

You can now edit the language edition of the page the normal way. Note that everything can be “translated”, even for example links. You can add new new links and other content if needed.

When you are finished, you publish the language edition the same way as for the master page, but now the button is named “Publish Translation”. If something went wrong, you can delete the language edition of the page.



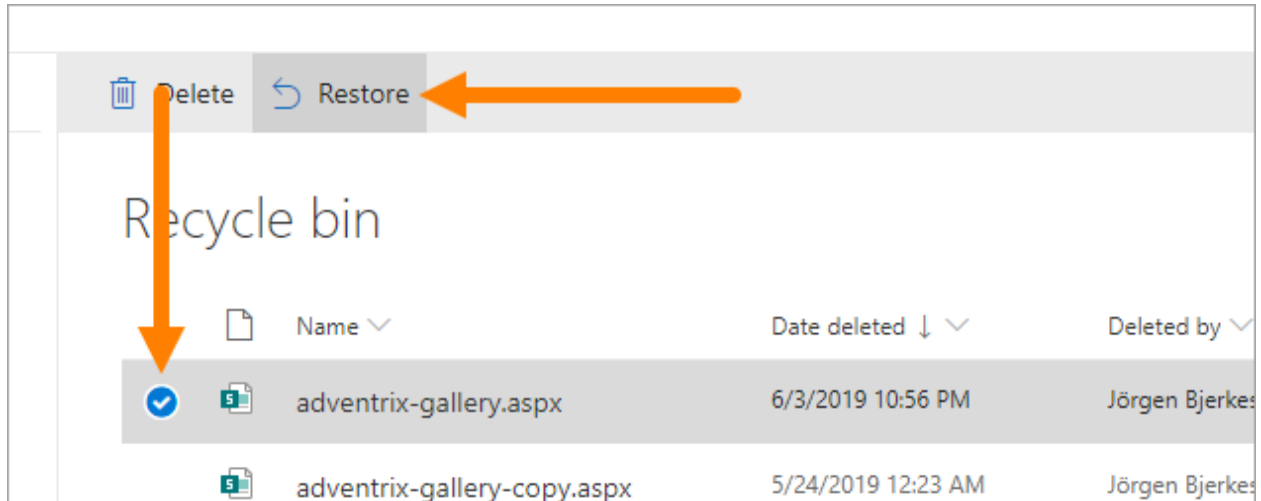
Restore a page to the Navigation Menu

It's possible to restore a deleted page to the Navigation Menu, if the deleted page is present in the Recycle bin.

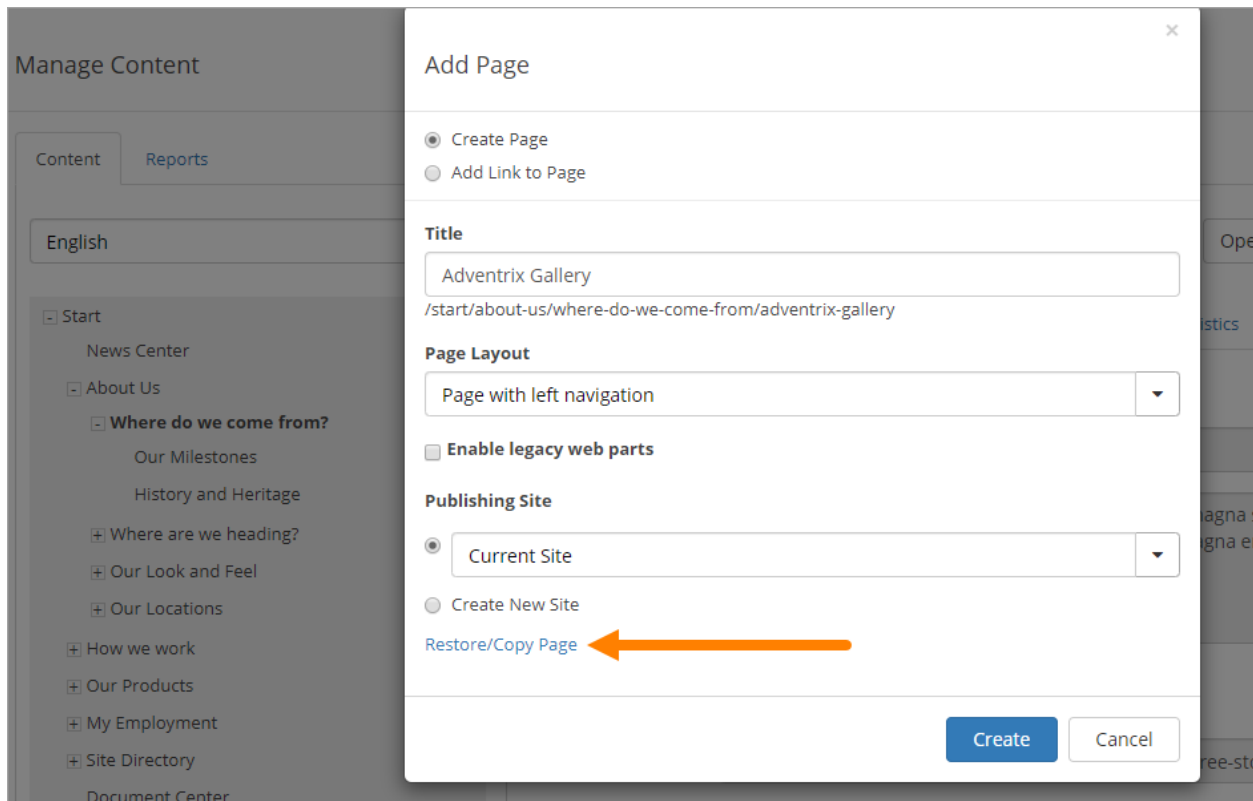
Note! If you restore a page in the navigation node that already exists in the structure, a copy will be created in the Pages library.

To restore a page to the Navigation Menu, do the following:

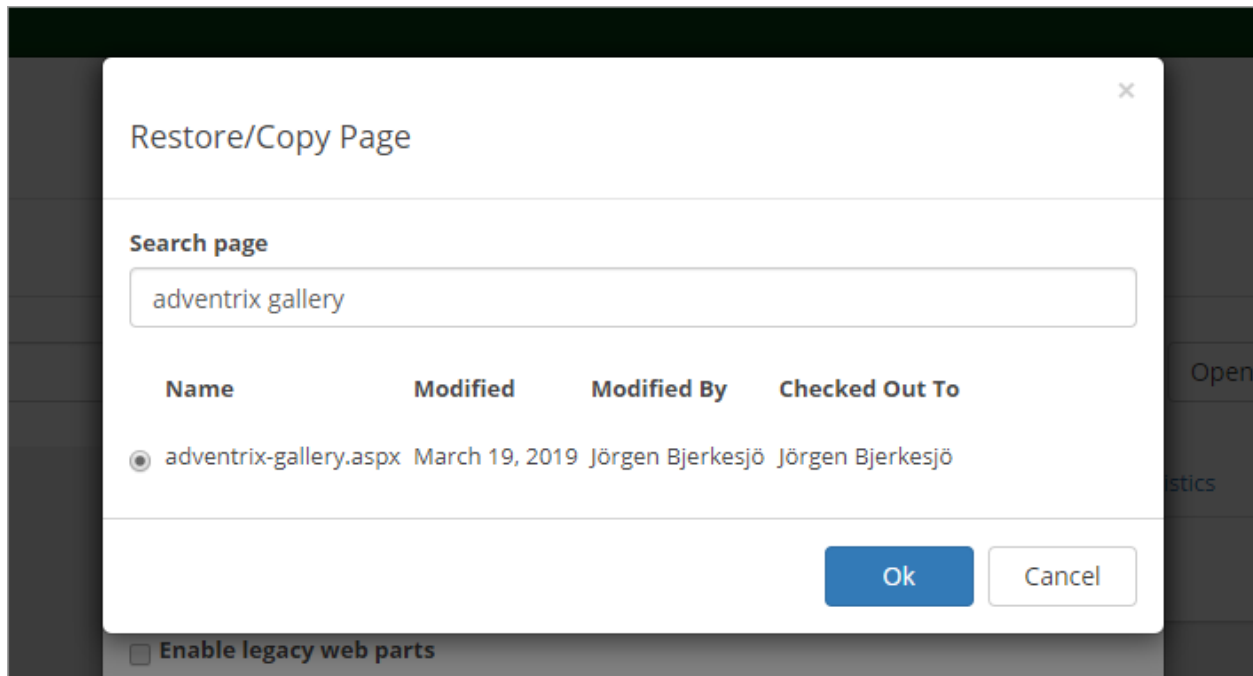
1. Go to the Recycle bin in SharePoint.
2. Restore the aspx page.



3. Open "Manage Content" and start the creation of a new page in the location where you want to restore the page.
4. Click on "Advanced Settings" in the "Create Page" dialog and click on "Restore/Copy Page".



- Find the page that you restored from the Recycle bin and select it.



- Create the page.

A new navigation node will now be created related to the restored page in the Pages library.

Permissions

To be able to edit or delete a page, you need the appropriate access rights to the physical page in SharePoint. The physical page is located in a publishing site and the permissions to the publishing site can be found on the Sites tab.

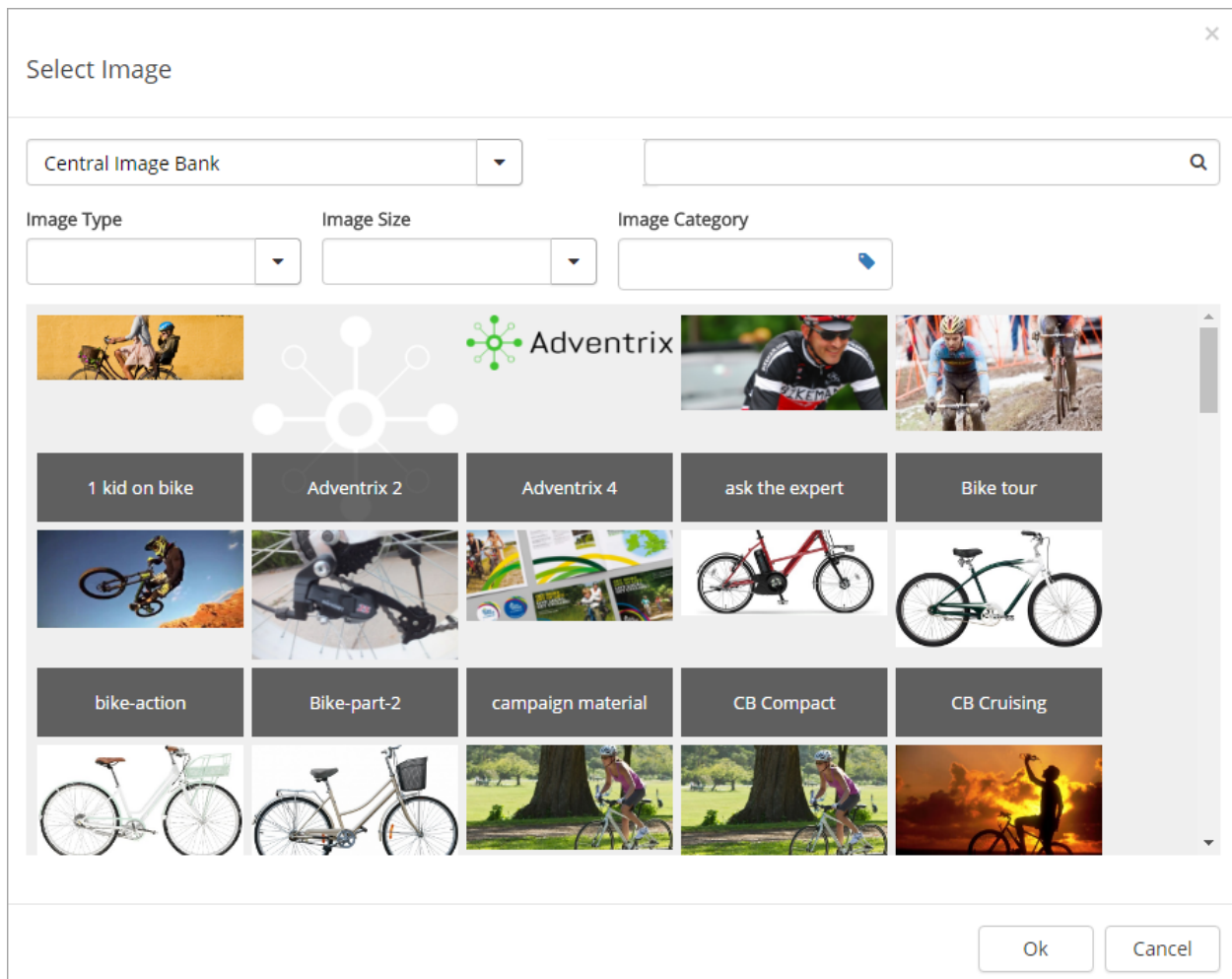
To be able to add a new page (or page link) in the navigation structure, you need SharePoint “Add Item” access rights in the publishing site where the parent page is located. Example: You want to create a new page below “Utility 13”. You need “Add Item” access rights on the publishing site where the physical page utility-13.aspx is located.

To be able to sort a page, you need edit access rights to the parent page in the navigation structure.

To be able to move a page, you need edit access rights on the publishing site where the target parent page is located.

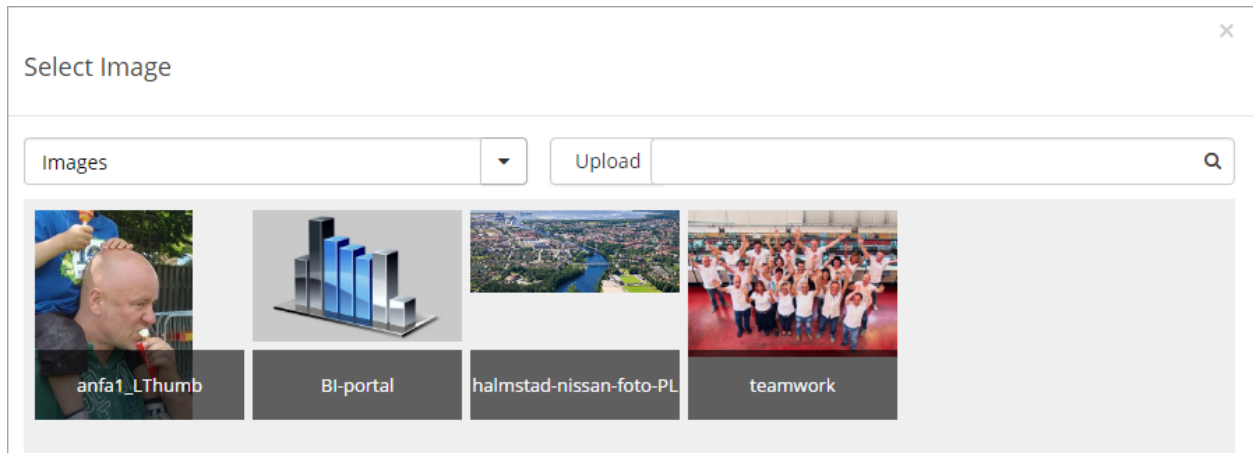
Image Picker

When browsing for an image using Quick Edit (for publishing pages and news article pages), you use the Omnia Image Picker. Here’s an example:



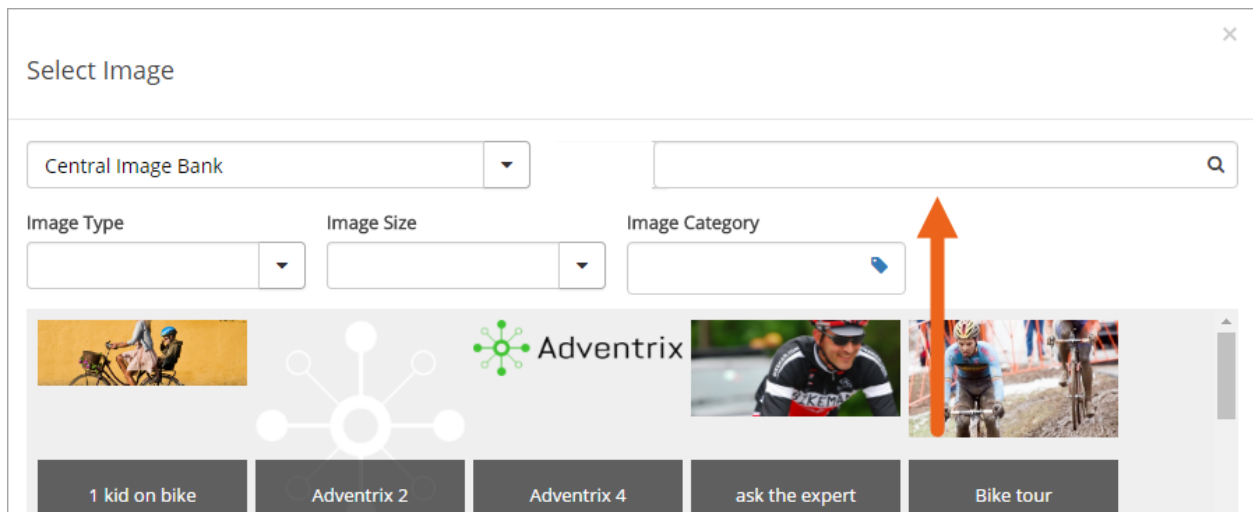
Start by selecting an image library. Normally there are one or more central image banks available, and one local image library. The local library is most often called just “Images”.

You can’t upload images to a central image bank, if you don’t have appropriate administrator permissions, but you can to the local image library. When you are allowed to upload images, an “Upload” button is shown, for example:



Click the button to upload any image from your computer. After you have uploaded, you can insert the image on the page.

Use the top right field to search for images in the selected image bank or library.



There can be some metadata fields (Properties) available for filtering. In this example, Image Type, Image Size and Image Category is available.

Open the list or click the button (depending on type of field) and select filter.

Choosing Image Rendition

When you have selected an image to insert on the page you can choose Image Rendition, for example:

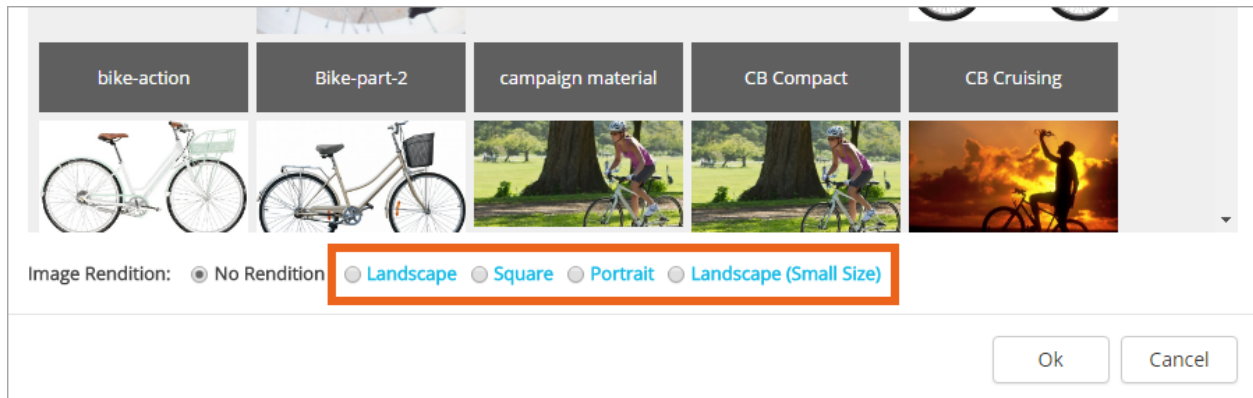
If you are inserting a page image (to the “Image” field in the “General” tab), normally “No Rendition” or “Landscape”, is the right choice.

When you have chosen an Image Rendition, keep an eye on the image. The image is always shown in the chosen rendition.

Note! Not all renditions are available in all image libraries.

Changing what part of the image to display

For the images (rather the image libraries) where you have the appropriate permissions, you can choose what part of the image to display, when you have chosen an Image Rendition. To do that, click the link for the rendition:



Use the selection at the top to decide what part of the image to display. You can move and change the size of the selection. Click “Save” to save your changes. Then click “OK” to close Image Rendition and go back to the image picker.

Note! Just one Image Rendition selection can exist for an image in a certain image library or folder. If several editors are using the same image bank or image library, you have to decide what Image Rendition selections to use. If one editor changes an Image Rendition selection, it is changed everywhere that image is used.

Media Picker

Setup Media Picker

The Media Picker must be activated to be available. If it’s not activated, the Image Picker will be available instead. For the Media Picker you can also choose to set up some predefined Bing Search Categories.

Activate Media Picker

Here’s how to active the Media Picker:

1. Open Omnia Admin and select System/Settings/Intranet Core.
2. Change “Use Media Picker” to “True”.

Intranet Core Settings		
Name	Value	
Disable e-mail notifications on comments	False	<button>Save</button>
Localization Languages (separated by semicolon)	en-US	<button>Save</button>
Media Picker Max File Size (KB)	2048	<button>Save</button>
People Term Group Name	People	<button>Save</button>
Use New Media Picker	True	<button>Save</button>

Set Media Picker Max File size

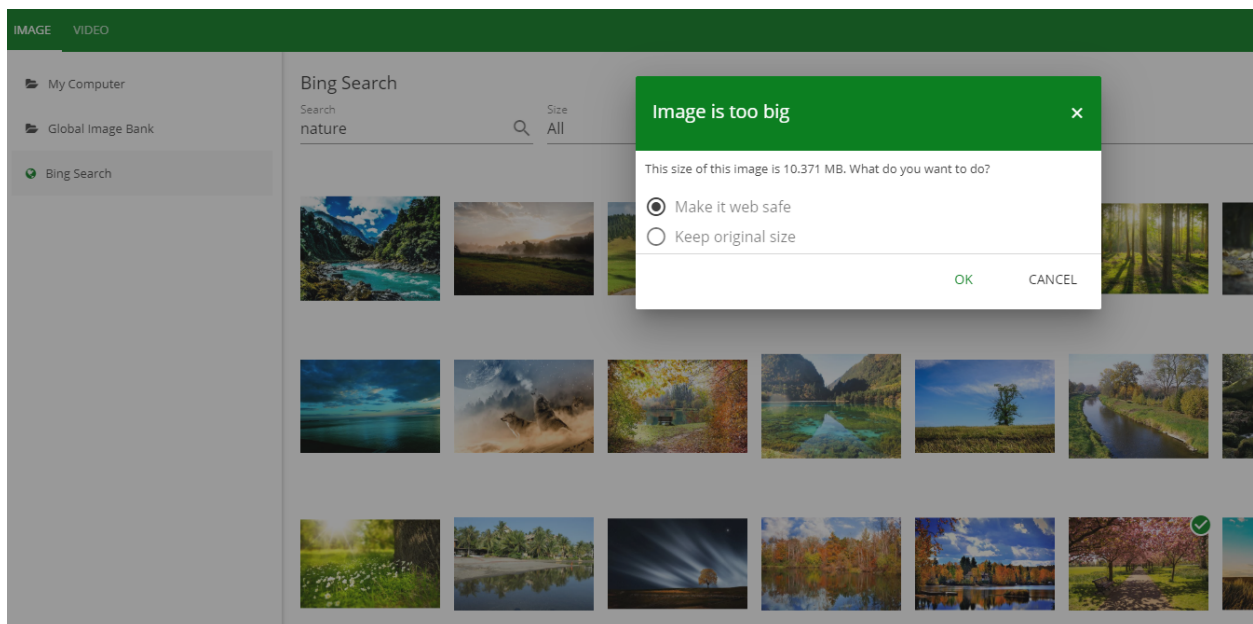
Here's how to set the max file size:

1. Open Omnia Admin and select System/Settings/Intranet Core.
2. Edit the file size if needed (1024 KB is the default).

Intranet Core Settings

Name	Value	
Disable e-mail notifications on comments	False	Save
Localization Languages (separated by semicolon)	en-US	Save
Media Picker Max File Size (KB)	1024	Save
People Term Group Name	People	Save
Use New Media Picker	True	Save



This setting is checked when a user selects an image in Media Picker. If the file size is above the value set, a warning is shown.



If the user selects "Make it web safe", the file size is downsized to the value set here.

Select Search Providers

In the Media Picker settings in Omnia Admin (System/Settings/Media Picker), you can select which Search Providers to use for the Media Picker:

 System »  Settings » Media Picker Settings

Bing Search Settings

Media Picker Settings:

	Provider	Component	Enable
0	Bing Image Provider	omfx-media-picker-bing-provider	<input checked="" type="checkbox"/>
1	Microsoft Stream Provider	omfx-media-picker-microsoft-stream-provider	<input checked="" type="checkbox"/>
2	My Computer Provider	omfx-media-picker-mycomputer-provider	<input checked="" type="checkbox"/>
3	Youtube Provider	omfx-media-picker-you-tube-provider	<input checked="" type="checkbox"/>
4	Image Bank Provider	omi-media-picker-image-bank-provider	<input checked="" type="checkbox"/>

Save

Select or deselect providers in the column “Enable”.

Set up predefined Bing Search categories

1. Open Omnia Admin and select System/Settings/Media Picker/Bing Search Settings.
2. Click “Add”.

Media Picker Settings

Display Text

Search Keyword

Image

Browse

Opacity

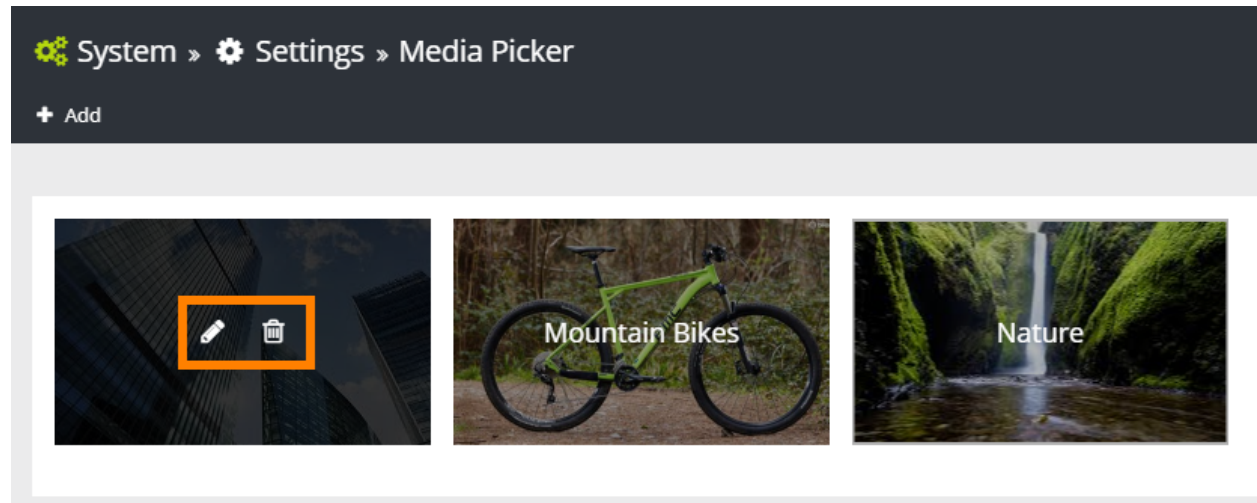
0.5

Ok

Cancel

- **Display text:** Add the “Heading” for the category.
- **Search Keyword:** Add the search keyword to be executed.
- **Image:** Add an image to represent the category.
- **Opacity:** Some opacity is needed to show the text on the image. Yo can change opacity here.

To edit or delete a category, point at the category and select the pen or the waste bin respectively.



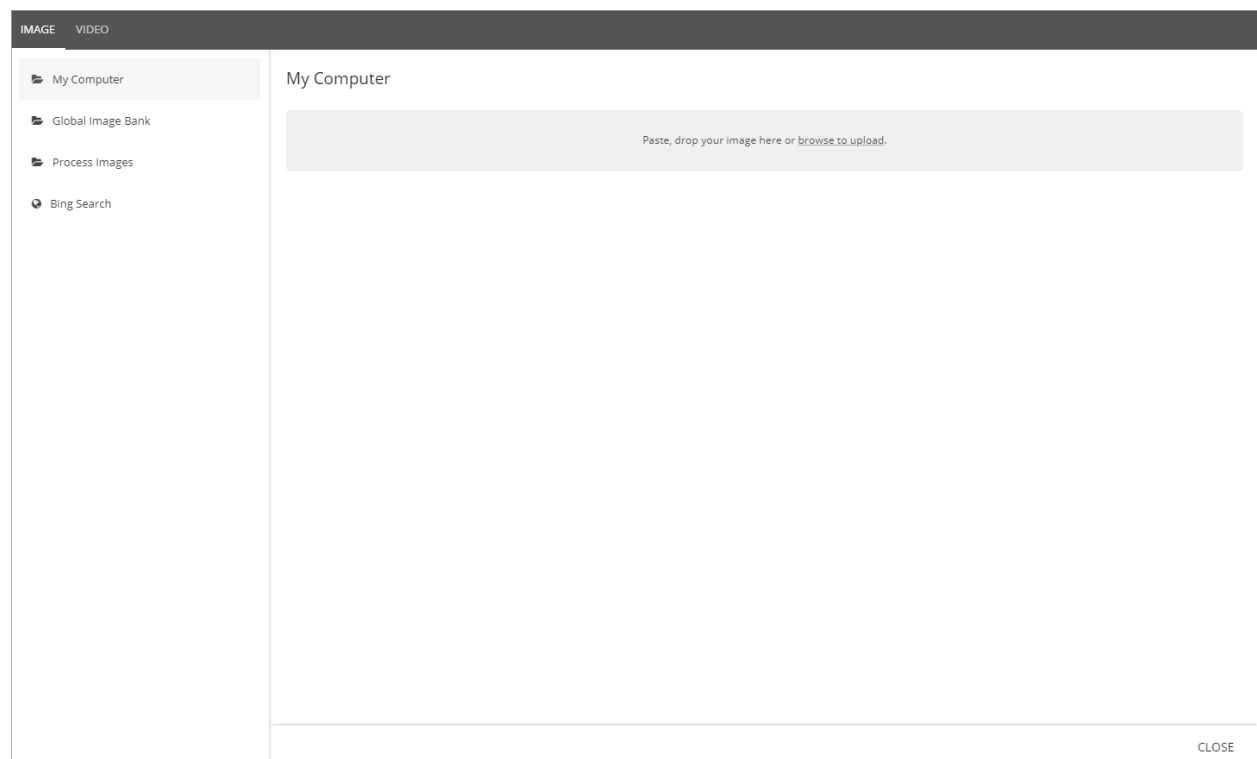
The Media Picker can be used to add an image or a video to the page image area or to the page content. Any image on the editor's computer can be selected, as well as from any central image location registered in Omnia Admin. An image can be pasted from the clipboard as well. Besides that Bing can be used to find images. Regarding Bing, only images that are free to use and share will be available.

Videos can be selected from your company's Stream in Microsoft 365, or from YouTube.

To use the Media Picker it needs to be activated in Omnia Admin (Systems/Settings/Intranet Core). If the Media Picker is not activated, the Image Picker will be used instead, see: [Image Picker](#)

Here's how to use the Media Picker:

When browsing for an image using Quick Edit (for publishing pages and news article pages), the Media Picker is opened:

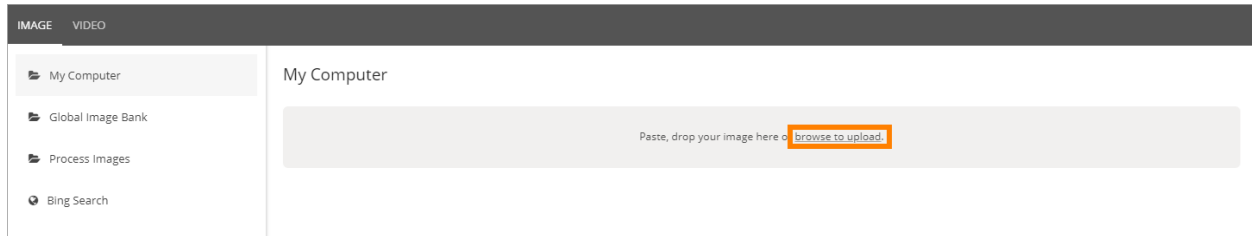


Image

The first step is to select an image and then some basic settings can be made, see below.

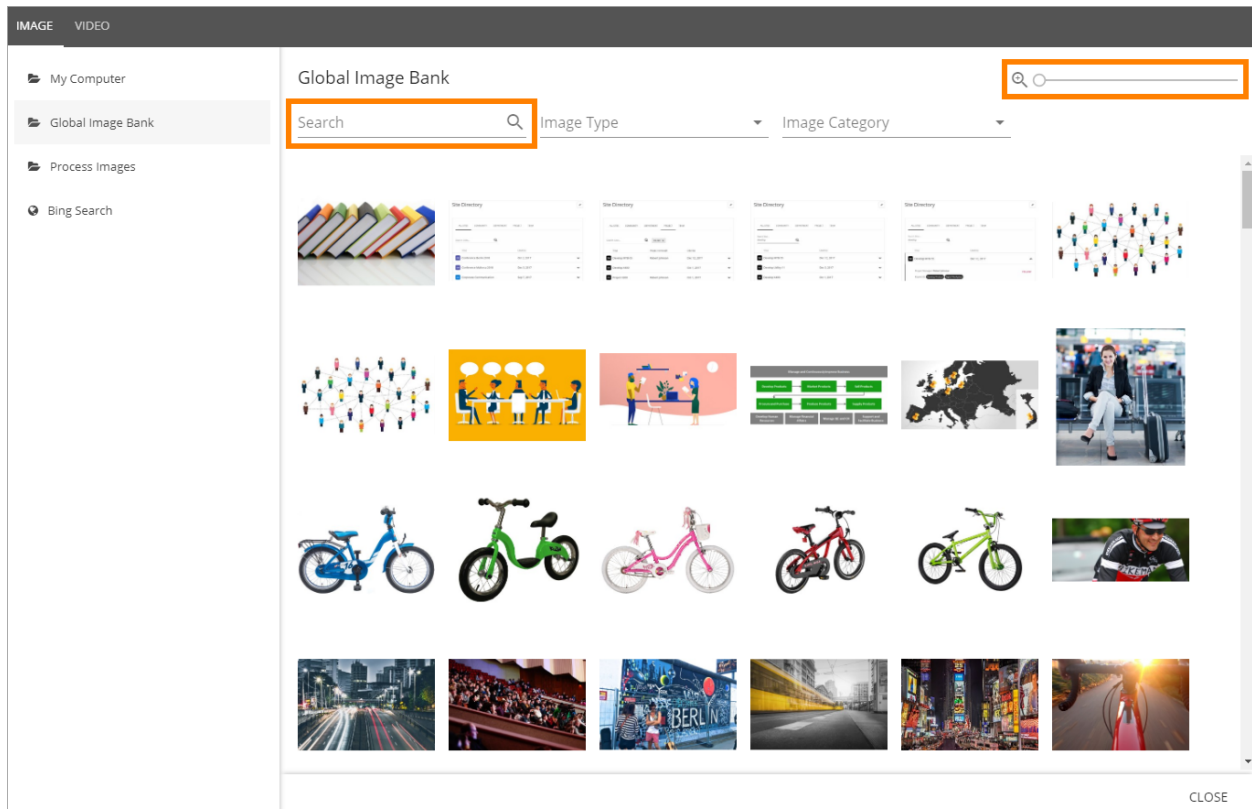
My Computer

Select “My Computer” to either paste an image from the clipboard or to browse for an image.

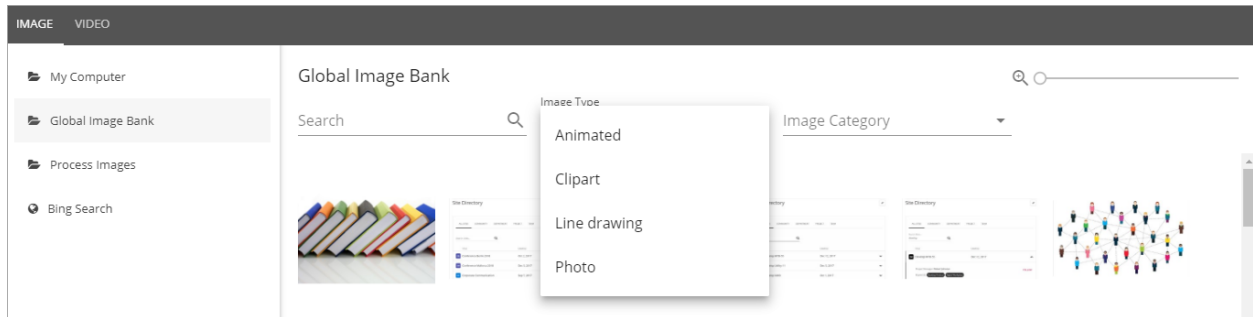


Global Image Bank

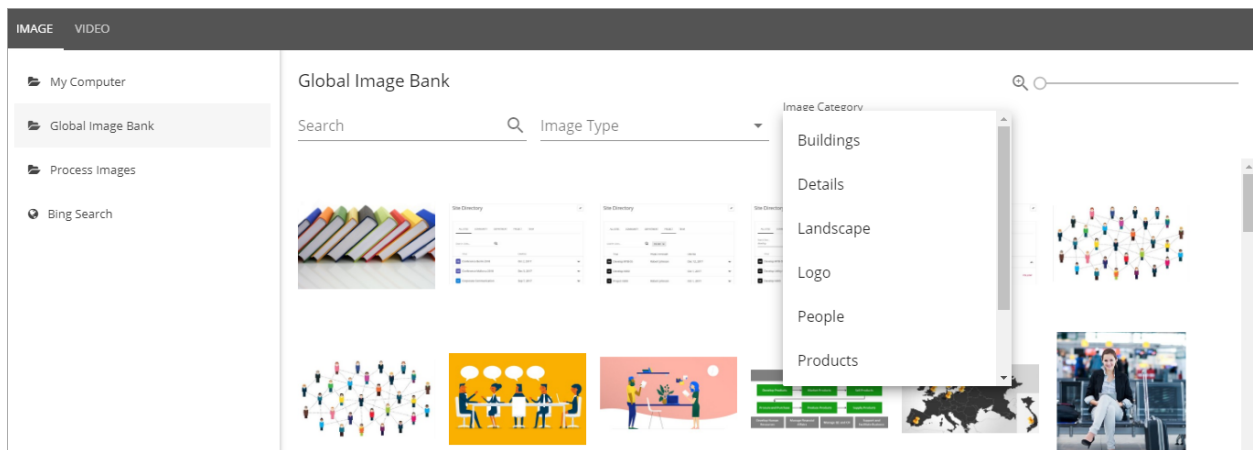
When selecting “Global Image Bank”, you see a preview of all images there. Use “Search” to search for an image. You can use the slider to the top right to change the preview size.



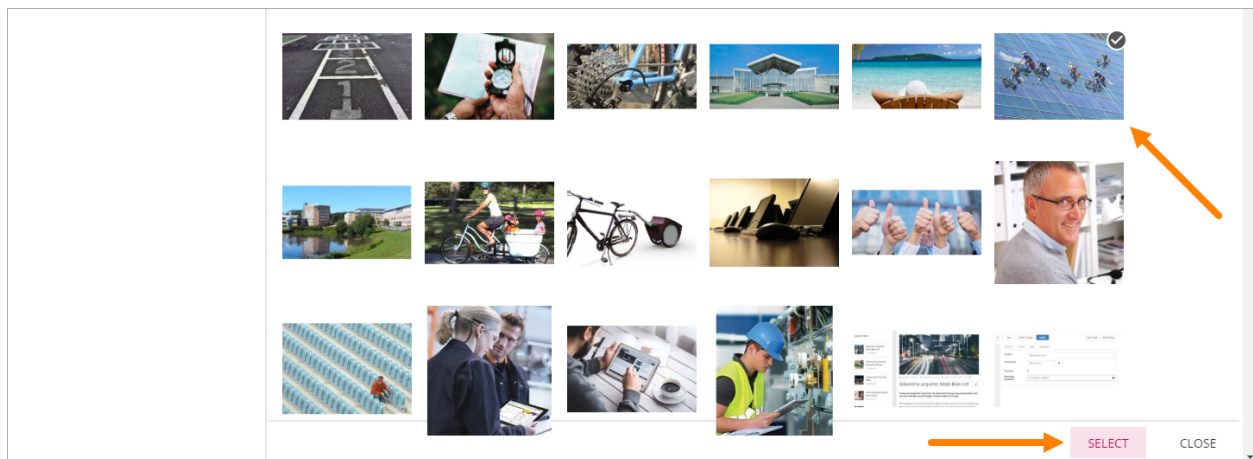
The image bank can be filtered on image type:



and on Image Category:

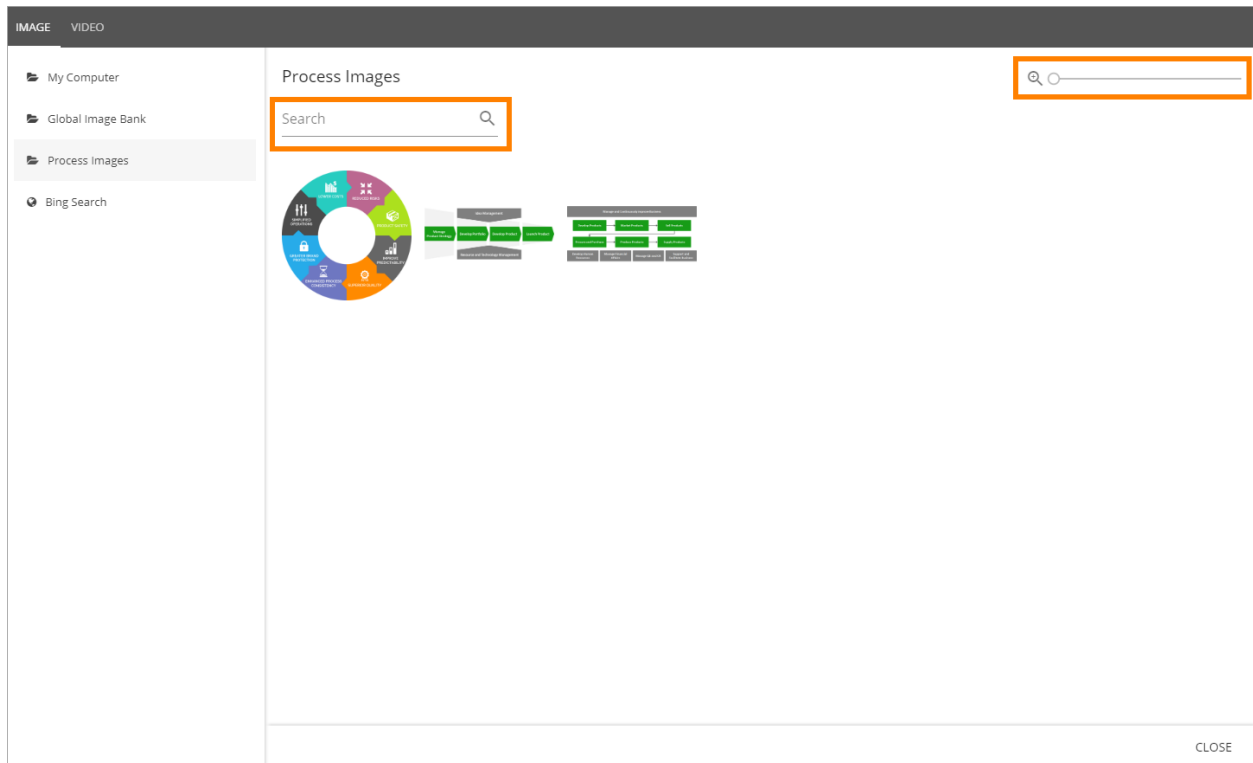


To select an image, double click on the image, or select the image and click “SELECT”.

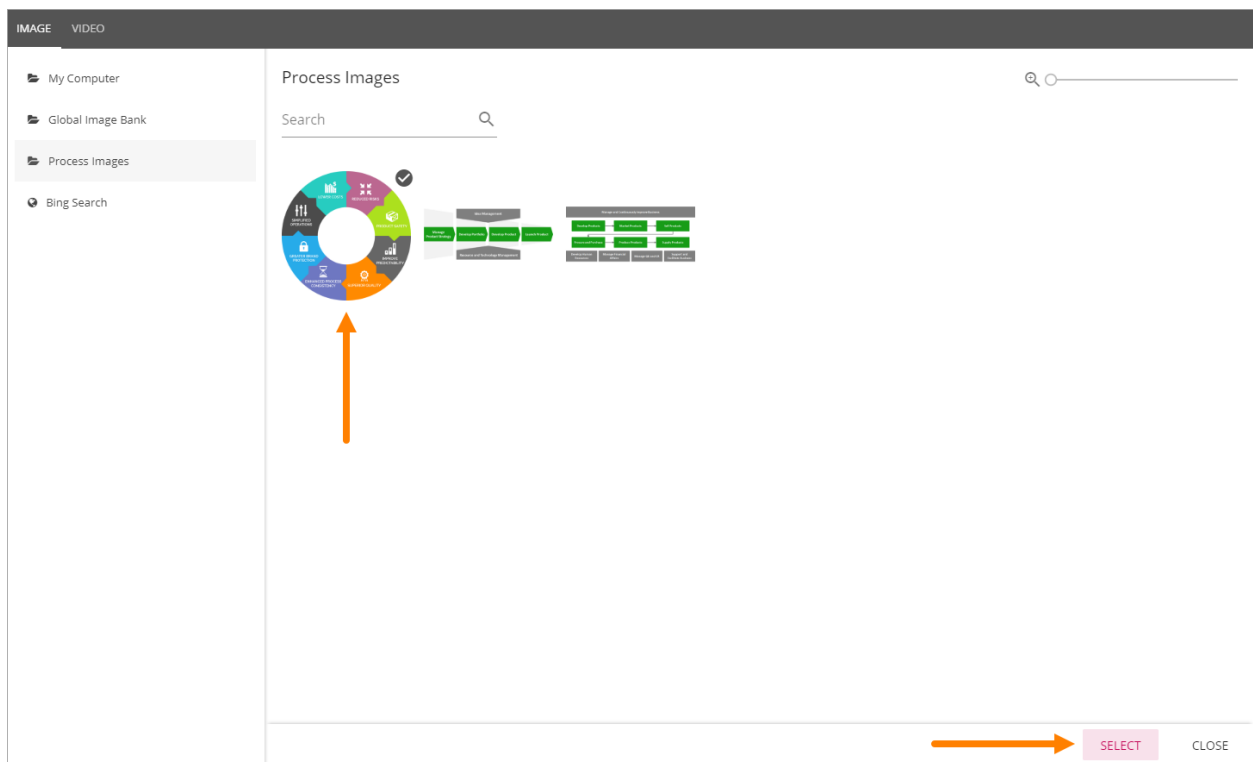


Process images

If Omnia QMS is installed, an image library for process images will be available. When selecting this option you see a preview of all images there. Use “Search” to search for an image. You can use the slider to the top right to change the preview size.

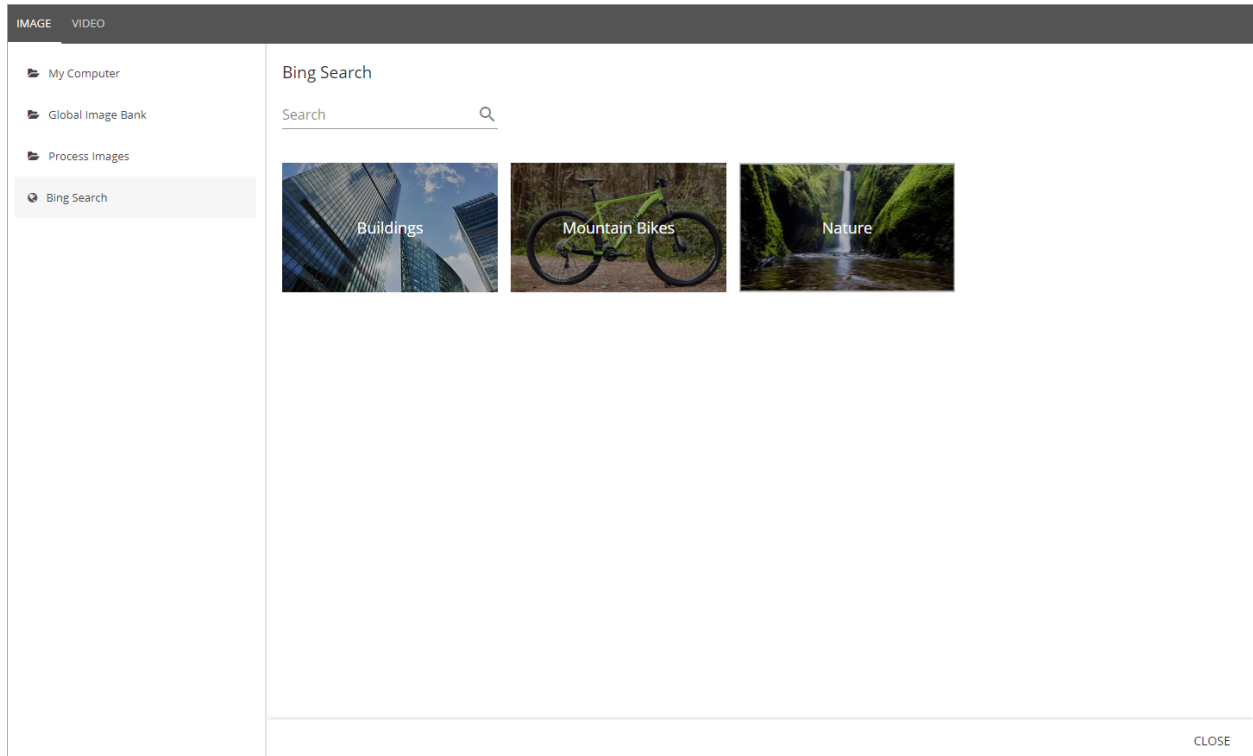


To select an image, double click on the image, or select the image and click “SELECT”.

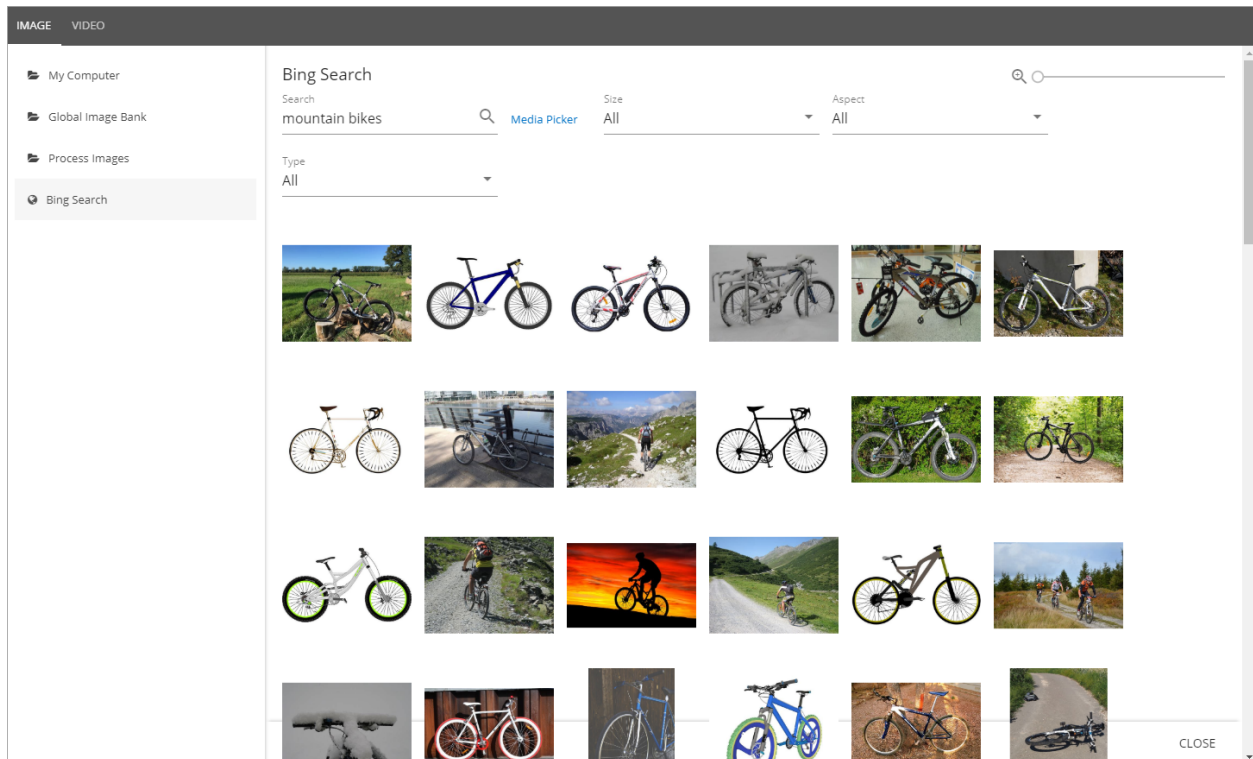


Bing Search

When selecting “Bing Search” you can search for any Bing image, or use the predefined search categories, if any is set up. Bing search categories can be set up by an administrator in Omnia Admin (Systems/Settings/Media Picker).

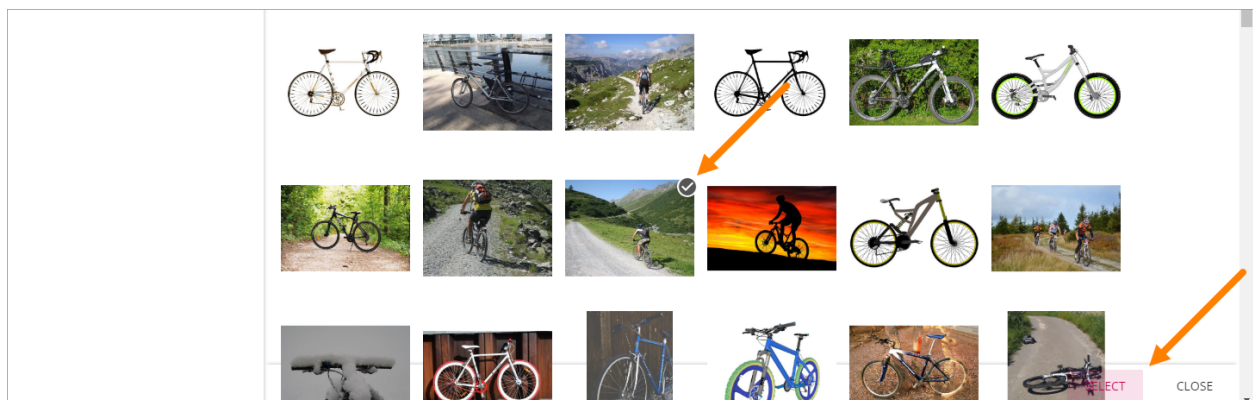


When a bing search has been conducted, something like the following is shown:



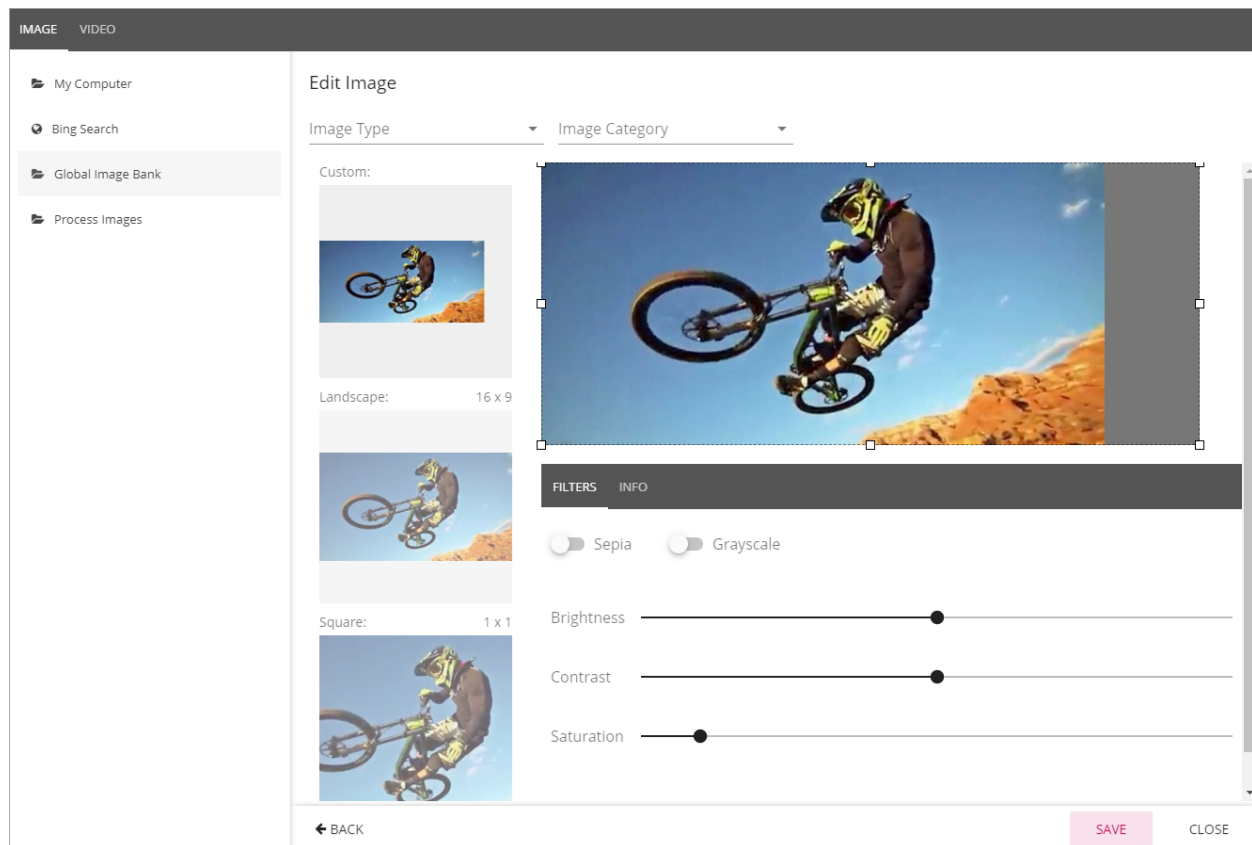
- **Search:** Use this field to conduct a new search.
- **Size:** Use this field to filter the search result on size; Small, Medium, Large, Wall paper, All.
- **Aspect:** Here you can filter on the image format; Square, Wide, Tall, All.
- **Type:** Use this to filter on image type; Clipart, Line, Photo, All.

To select an image, double click or select the image and click “SELECT”.



Settings for an image

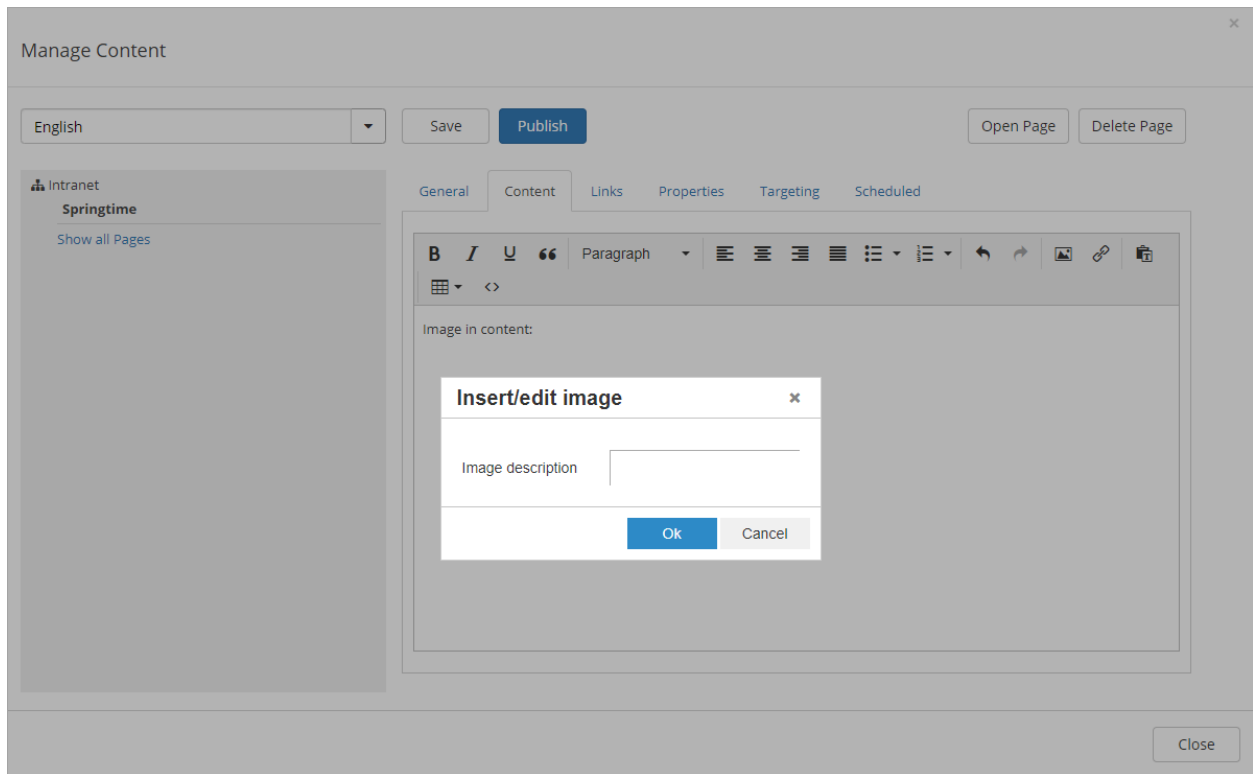
When the image has been selected, the following settings can be made:



- **Image Type:** Select image type. Can be used for filtering the image list, see above.
- **Image Category:** Select image category. Can be used for filtering the list, see above.
- **Custom:** Set a custom shape using the eight squares as handles. Just draw to the desired shape. When a custom image is used in a page image area the full width of the area is used and the height of the area is adapted.
- **Landscape:** Click the Landscape preview and use the selection on the image to decide which part of the image to show when it's used in landscape format.
- **Square:** Click the Square preview and use the selection on the image to decide which part of the image to show when it's used in square format.
- **Filters:** Use the filters to adjust the image; Sepia coloring, Grayscale coloring, Brightness, Contrast and Saturation.
- **Info:** Use the Info tab to edit the file name and enter Alt Text for the image.

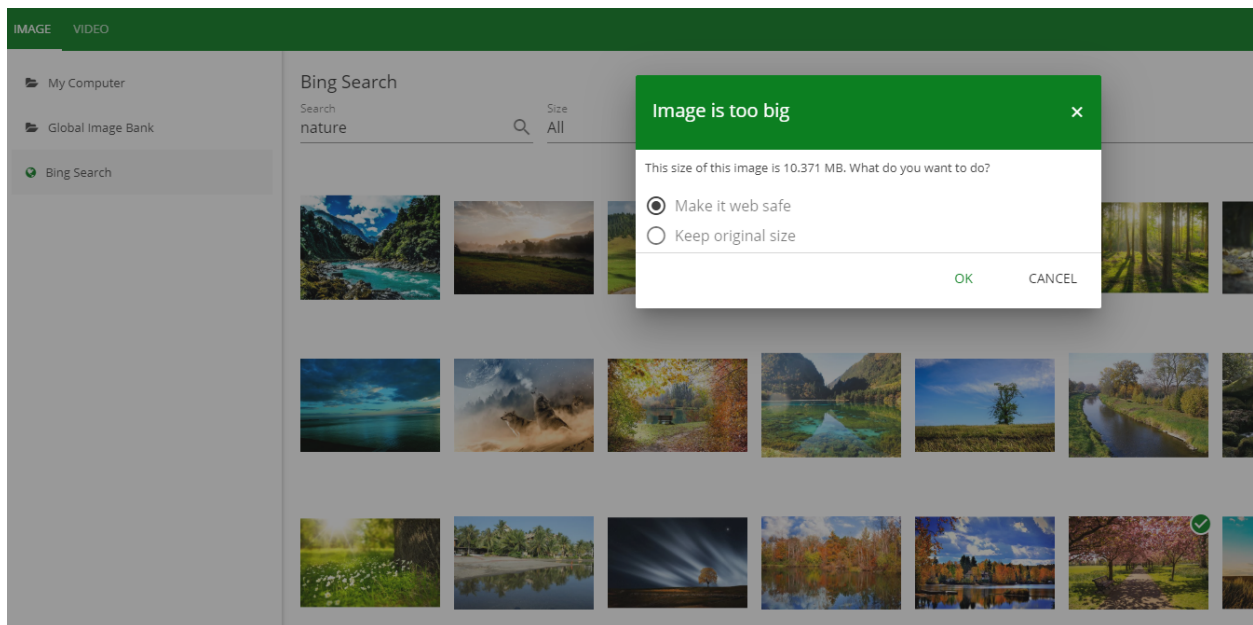
Don't forget to save your changes when you're done.

When adding an image to contents, an image description must be added:



Images that are too big

If a user uploads an image that is too big, a warning is shown and the user can select to make the image “Web safe”, that is downsized to the the maximum size for images set, or keep the original size.



The setting for maximum image size is set in Omnia Admin, see the “Setup Media Picker (link at the top of m this page).

Video

For Video, select either “Microsoft Stream” for your company’s Microsoft 365 Stream, or “YouTube”.

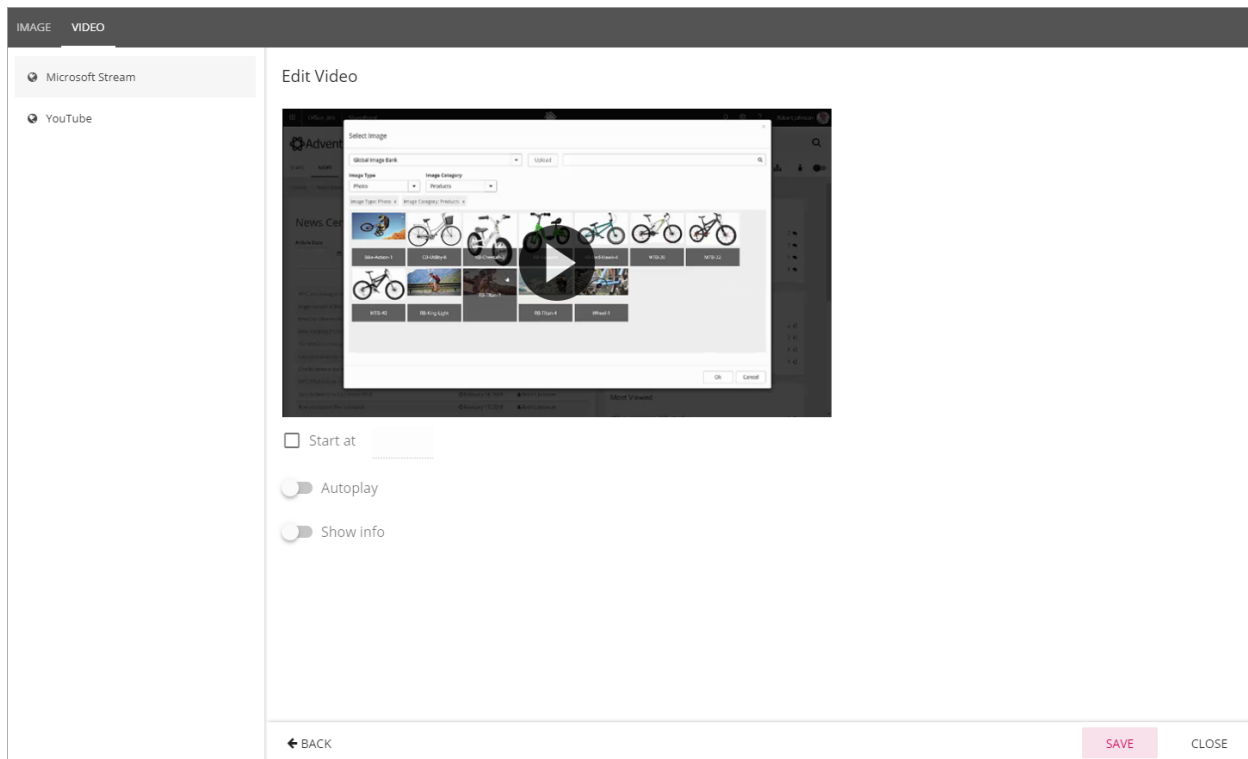
The screenshot shows a web interface for adding video. At the top, there's a dark bar with two tabs: 'IMAGE' and 'VIDEO'. Below this, on the left, is a sidebar with two options: 'Microsoft Stream' and 'YouTube'. The 'YouTube' option is highlighted. The main content area is titled 'YouTube' and contains a 'Choose video' label and a 'Video url' input field. A 'CLOSE' button is located in the bottom right corner of the main area.

Note! You use this option to add a link to a video on a specific page (to the page image area). The link is not saved in the Media Picker, just on the page.

Here’s how to add a video:

1. Go to the video.
2. Copy the Url for the video.
3. Paste the Url here.

Now the following settings are available:



- **Start at:** If the video should not start at the beginning, set when it should start. Use the format minutes:seconds.
- **Autoplay:** If the video should start automatically when a user opens the page, select this option.
- **Show info:** If the information about the video should be shown, select this option.

Page Layouts

An administrator or an editor with the correct permissions can work with Page Layouts. The prerequisite is that the page is a **Quick Page**.

You can't use this kind of Page Layout on a standard Sharepoint Page - a page where "Enable legacy web parts" is on.

There are two levels which will normally need different permissions:

- **Layout Designer:** Normally used by an administrator, to create layouts to be used in Page Designer.
- **Page Designer:** Normally used by an administrator or an editor to place controls (blocks) in the layout. A block can for example be Page Contents, Related Links or a Banner. For more information on Page Designer, see below.

Besides that, there are settings in Omnia Admin.

The Layout Designer, The Omnia Admin settings and the Page Designer are all described here, and in that order. See the corresponding sections below.

The Layout Designer

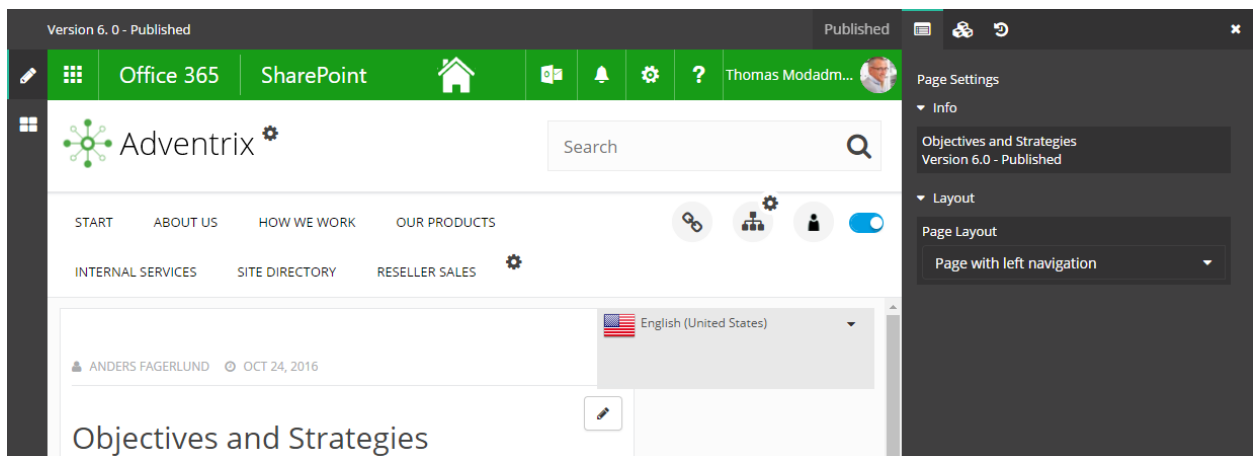
Layout Designer is used to create layouts to be used in Page Designer

Working with Layout Designer

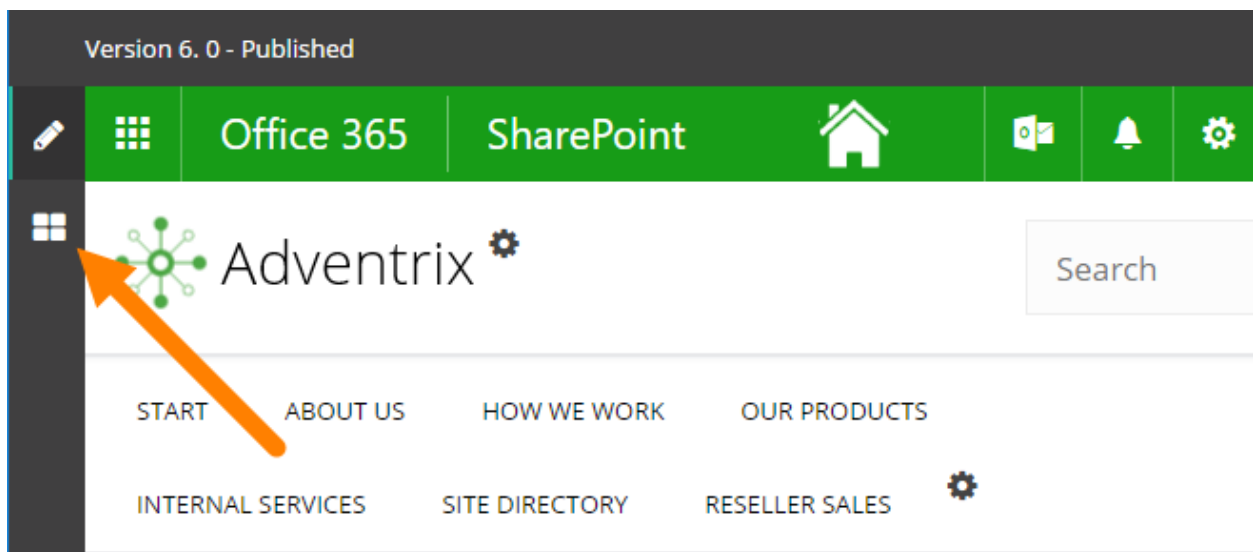
Do the following:

1. Go to the page you will be working on.
2. Open the administration menu.
3. Select “Edit page”.

If you have the correct permissions something like this will be shown:



4. Click the “Layout Designer” icon (if it’s not shown, you don’t have the correct permissions).

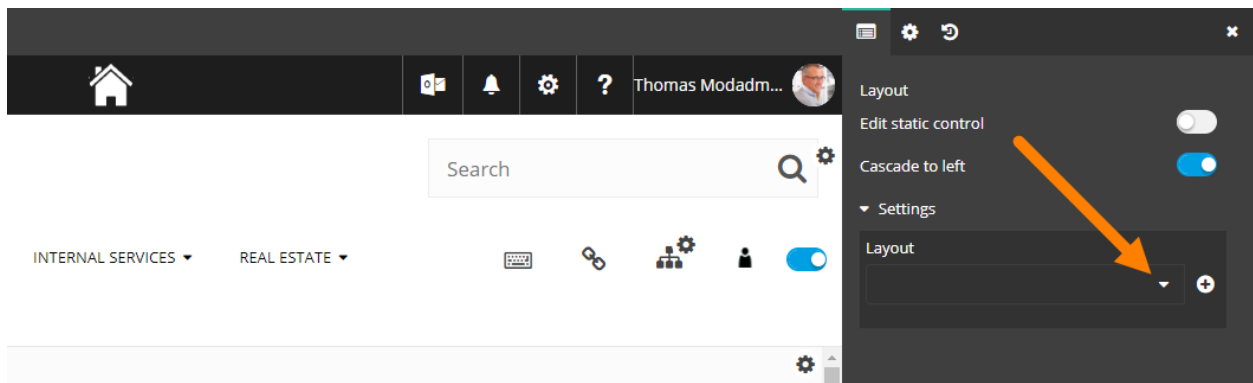


You can now select Page Layout for the page, edit the Page Layout or create a new Page Layout.

Selecting a Page Layout

To select a Page Layout, do the following:

1. Open the list “Layout” and select a layout.



If more than one Page Layout is available, you can change Page Layout for a page this way. You must publish to apply the layout change.

Note! If blocks already are added to the page, they will normally realign to the new layout. If that is not possible, all blocks will be placed in one single Zone. You then have to drag the blocks to the correct Zones.

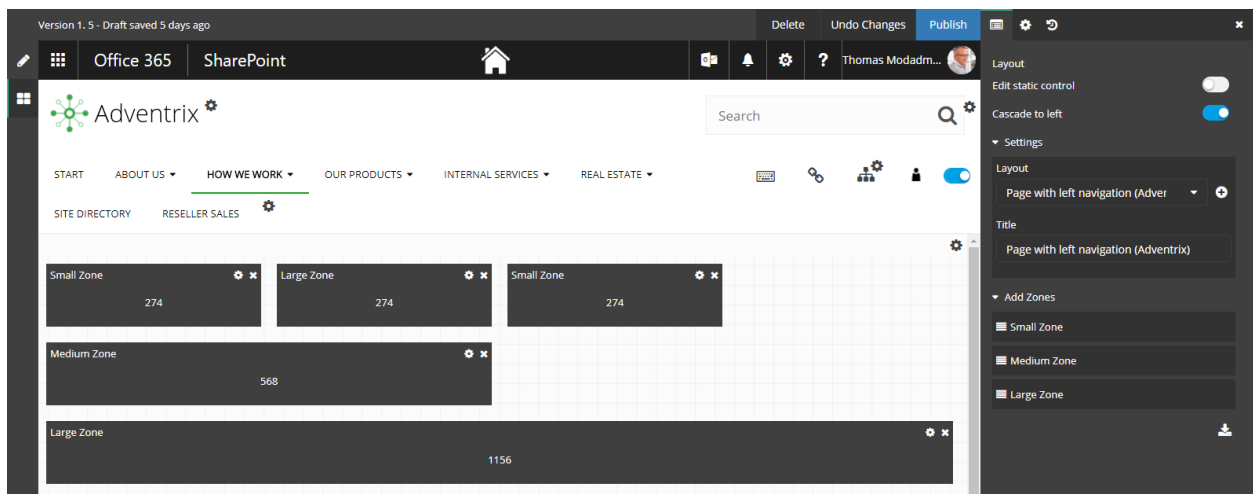
Editing a Page Layout

To edit a Page Layout, do the following:

1. Select layout.

Note! You can only edit Page Layouts created by you or another administrator. Layouts that are implemented when the Intranet is installed can't be edited (but can be selected).

Something like this is shown:



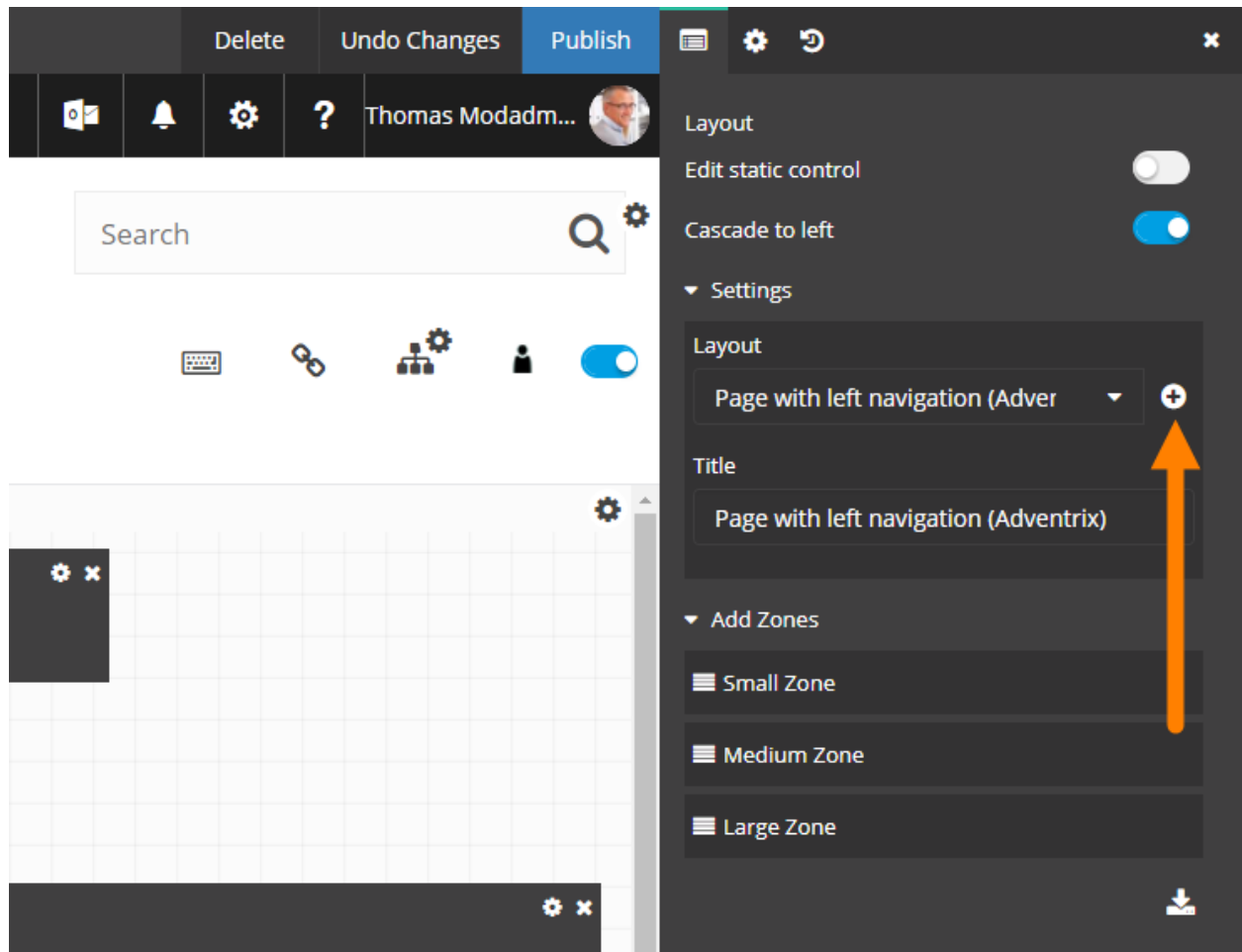
You can now add, edit or delete Zones. You must publish to apply the changes.

When you edit an existing layout you can choose to save your edited layout as a new template, see below. You don't have to publish to be able to do that.

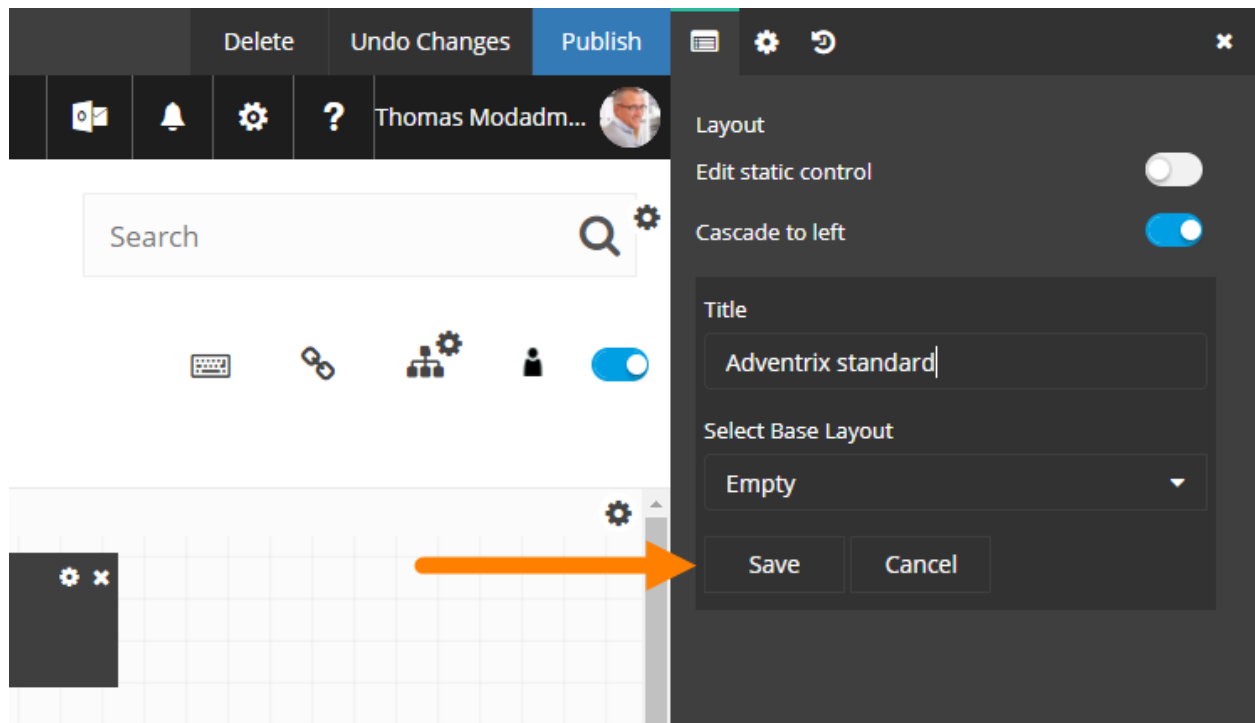
Creating a new Page Layout

To create a new Page Layout, do the following:

1. Click the plus.



2. Add a title for the new layout.
3. Click “Save”.



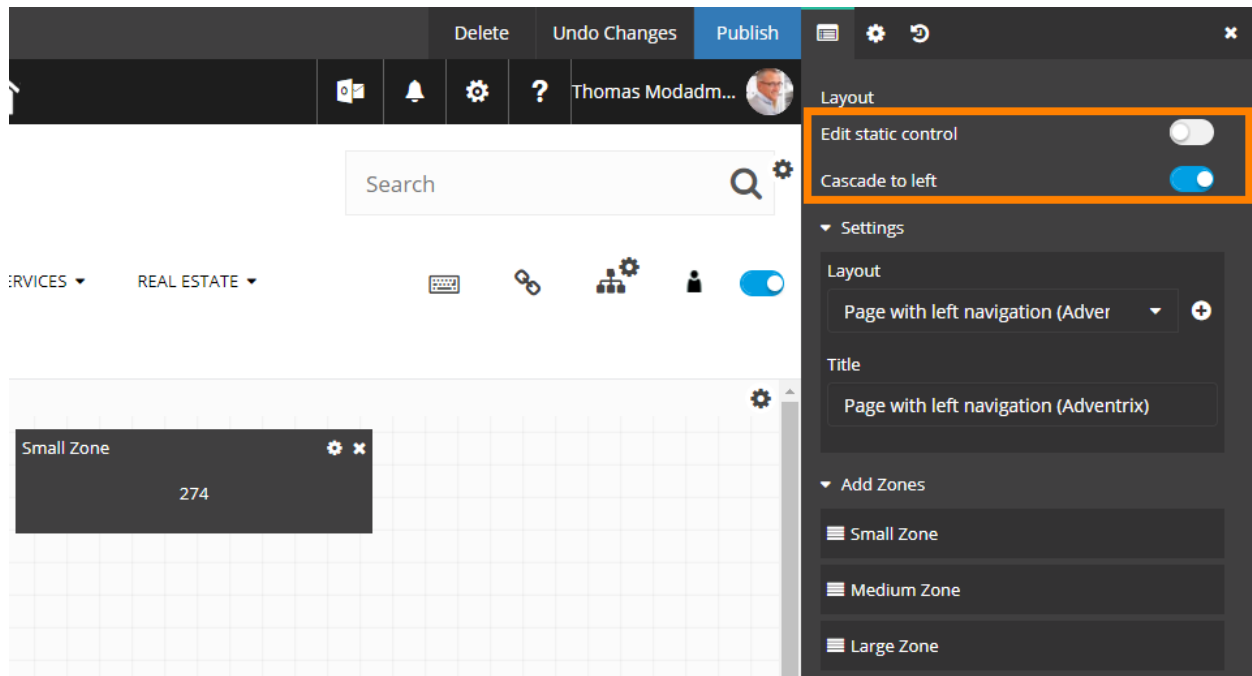
4. Edit the new layout by adding, deleting or editing Zones.

5. Publish to apply the changes to the Page Layout.

Note! When you publish, the selected page layout will be applied for the active page.

Edit static control and Cascade to left

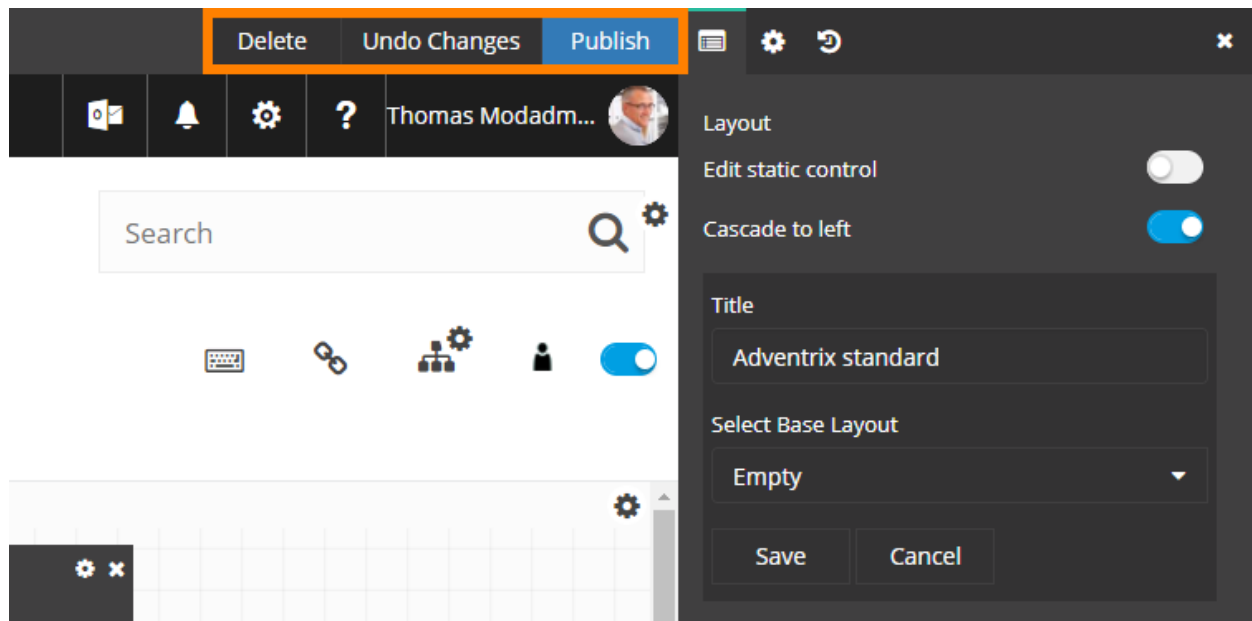
When you edit a layout there can be static controls, that can't be edited or moved by the editor. As default they are not shown. If you want to see where they are, click "Edit static control".



When you add a new control, it is, per default, aligned (cascaded) to the left. If you don't want that, click "Cascade to left" to deselect that option.

Delete, Undo Changes and Publish

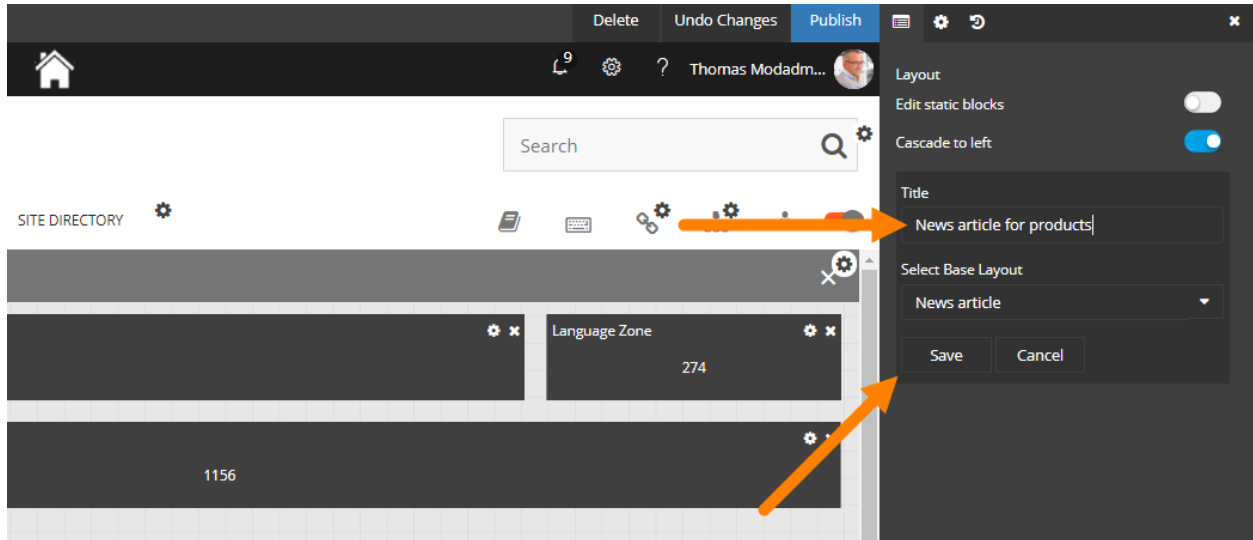
You can delete a Page Layout, undo the changes you have made and publish the changes, by using the buttons at the top:



Save as a new template

When you have made all the changes, you can choose to save the layout as new layout template (base layout). You don't have to publish to be able to do that.

1. Add a new name for the layout and then click "Save".

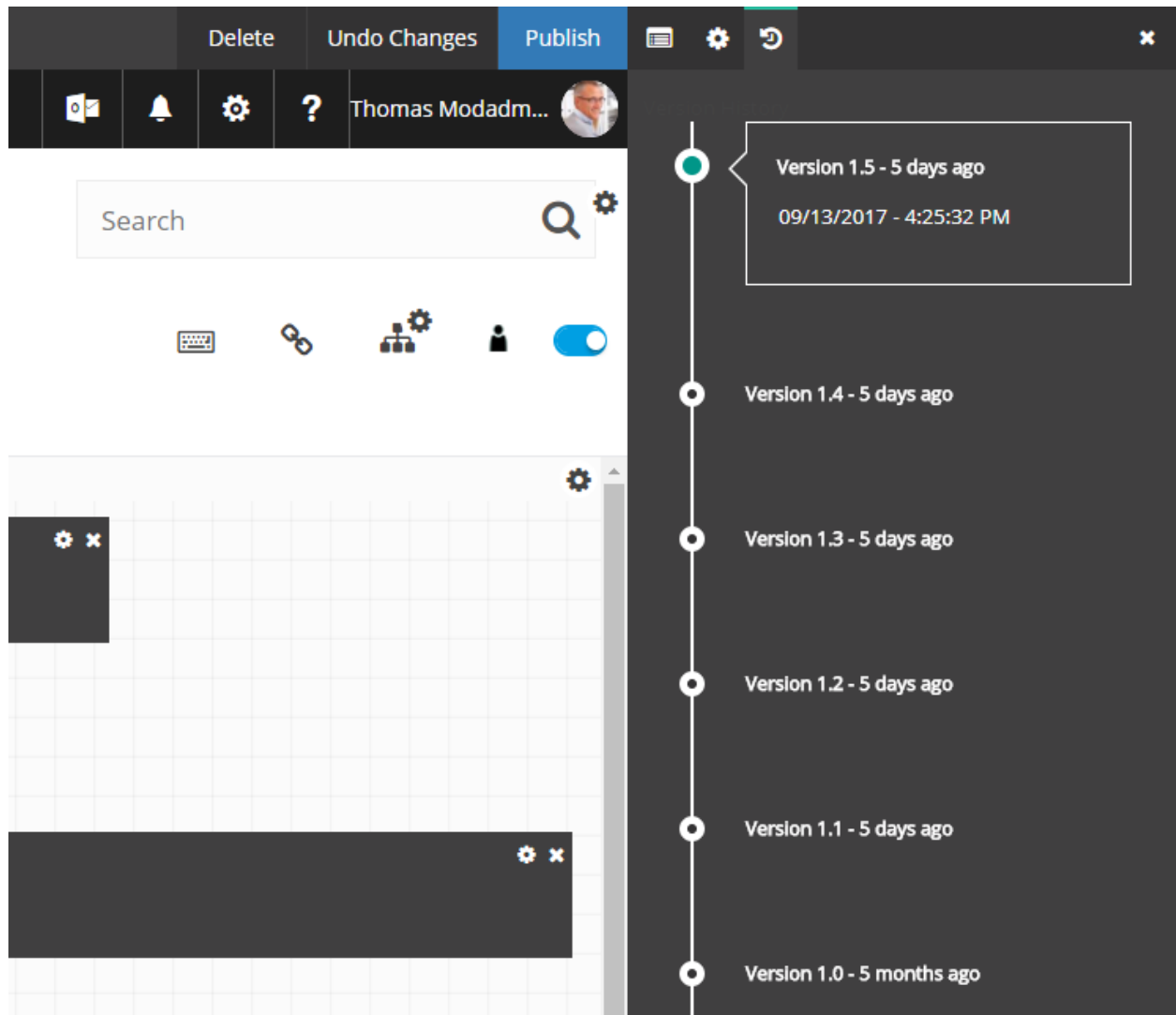


You can continue working on the page, adding blocks and so forth, and publish when you are done.

Version History for Page Layouts

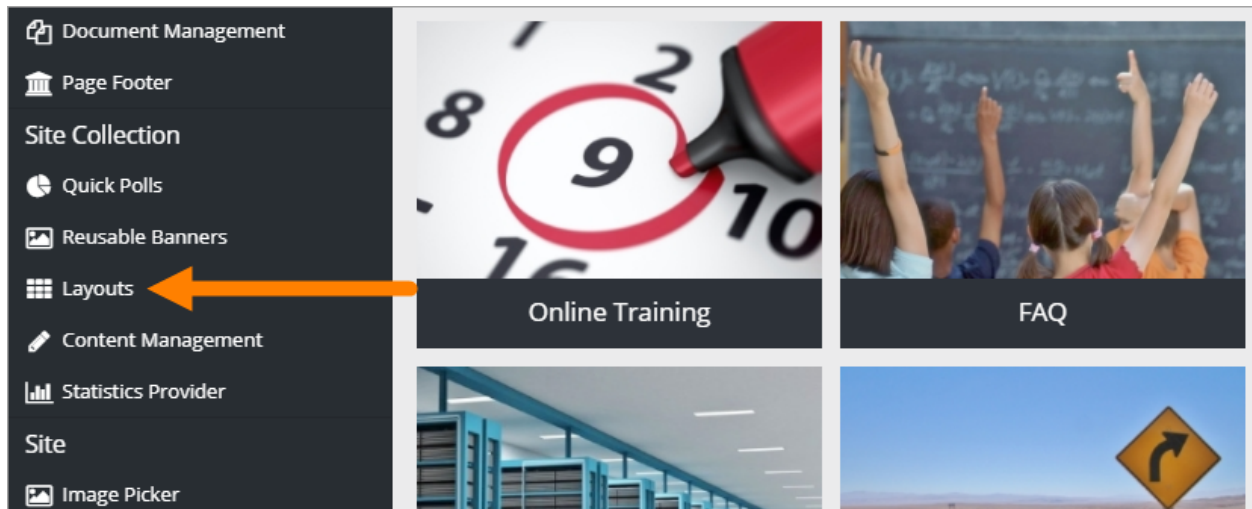
When you do any change to a Page Layout, a Version History node is created. You can use the Version History to go back to any earlier edition of the Page Layout.

Published editions are noted with an integer, work in progress with a decimal.

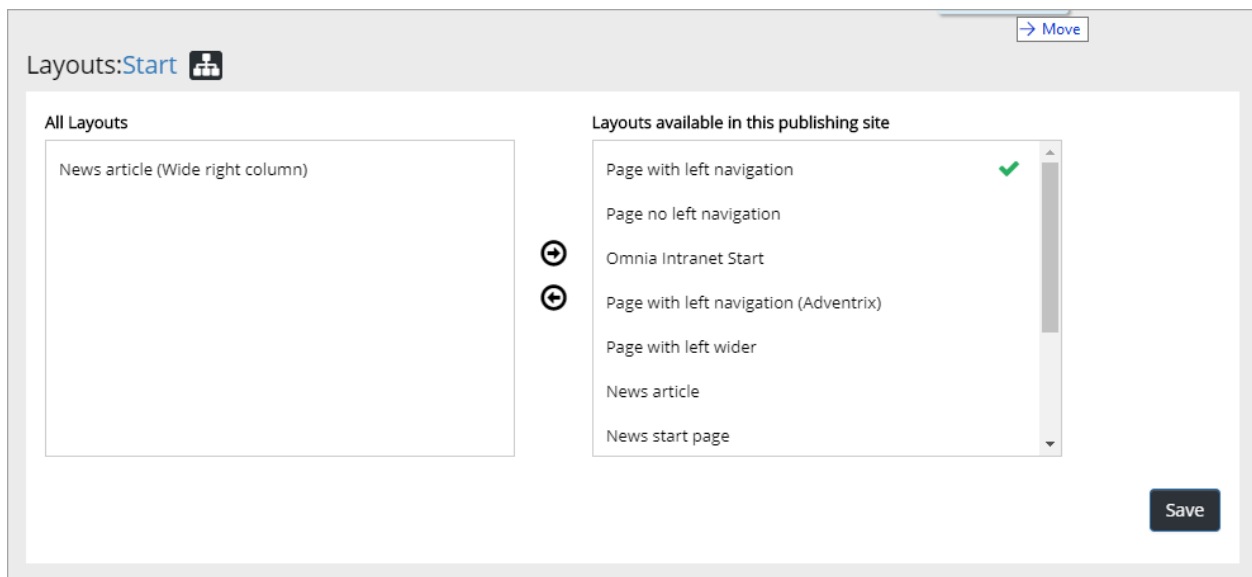


Settings in Omnia Admin

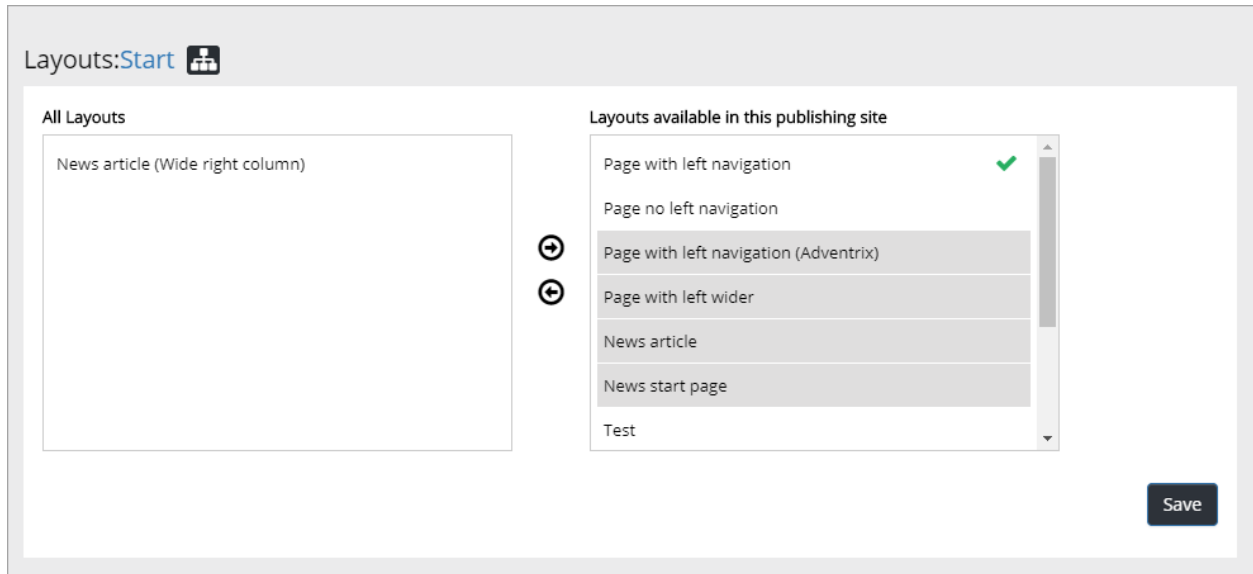
Using the settings in Omnia Admin, an administrator can select the Page Layouts that should be available for the active Site Collection (applicable for Publishing Sites only).



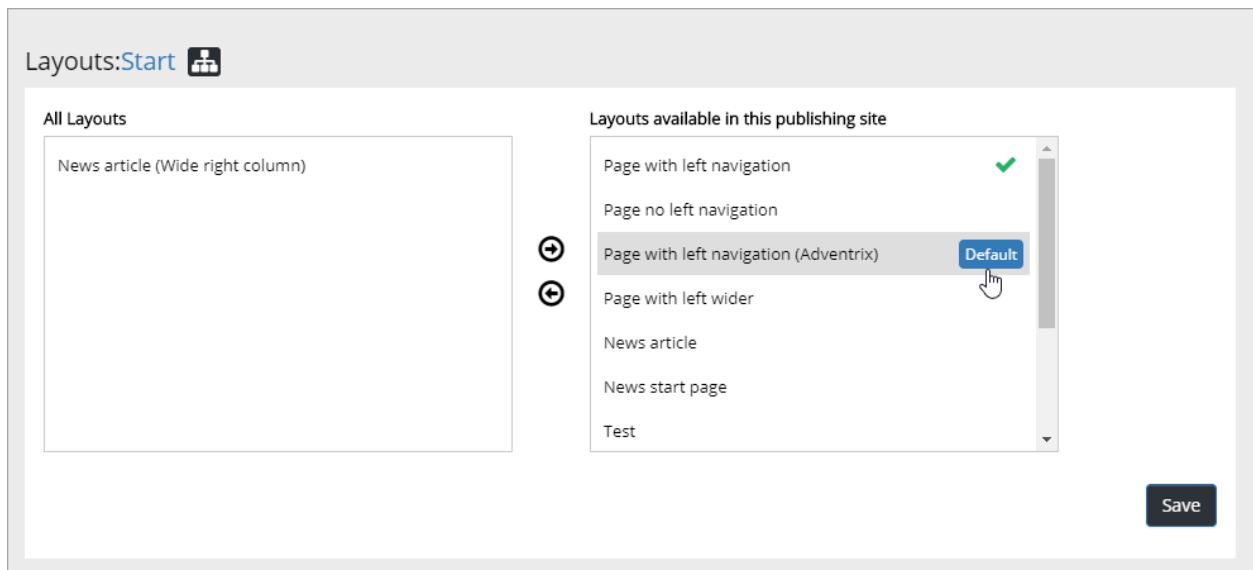
The list of available Layouts is shown, for example:



Use the buttons in the middle to move Page Layouts to or from the lists, to decide which layouts should be available here. You can select several by clicking on them, and deselect the same way.



One Page Layout is always Default. It's the one with a green symbol. You can select any other layout as the default by pointing at it and clicking "Default".



Don't forget to save when you're done with all changes.

Page Designer

Here we will describe Page Designer. For an instruction on how to use Layout Designer, see above.

A very important difference between a Quick Page and a standard Sharepoint is what the editor can see. The end user will always see the same thing: the latest published version.

- For a standard Sharepoint page an editor will see the latest edited version, regardless of who made the changes, and regardless of whether that version is published or not.
- For a Quick Page an editor will always see the latest **published** version and must open the page for editing to see the latest edited version.

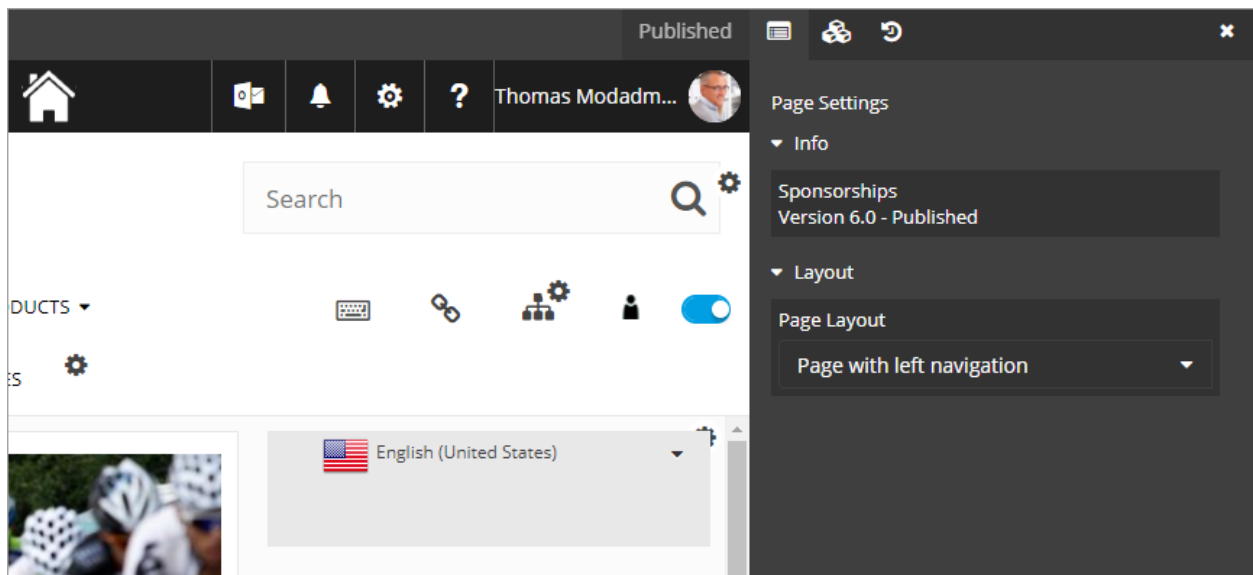
Selecting another Page Layout

You can select any available Page Layout for a page and you can add or delete blocks (controls) in the different Zones in a Page Layout.

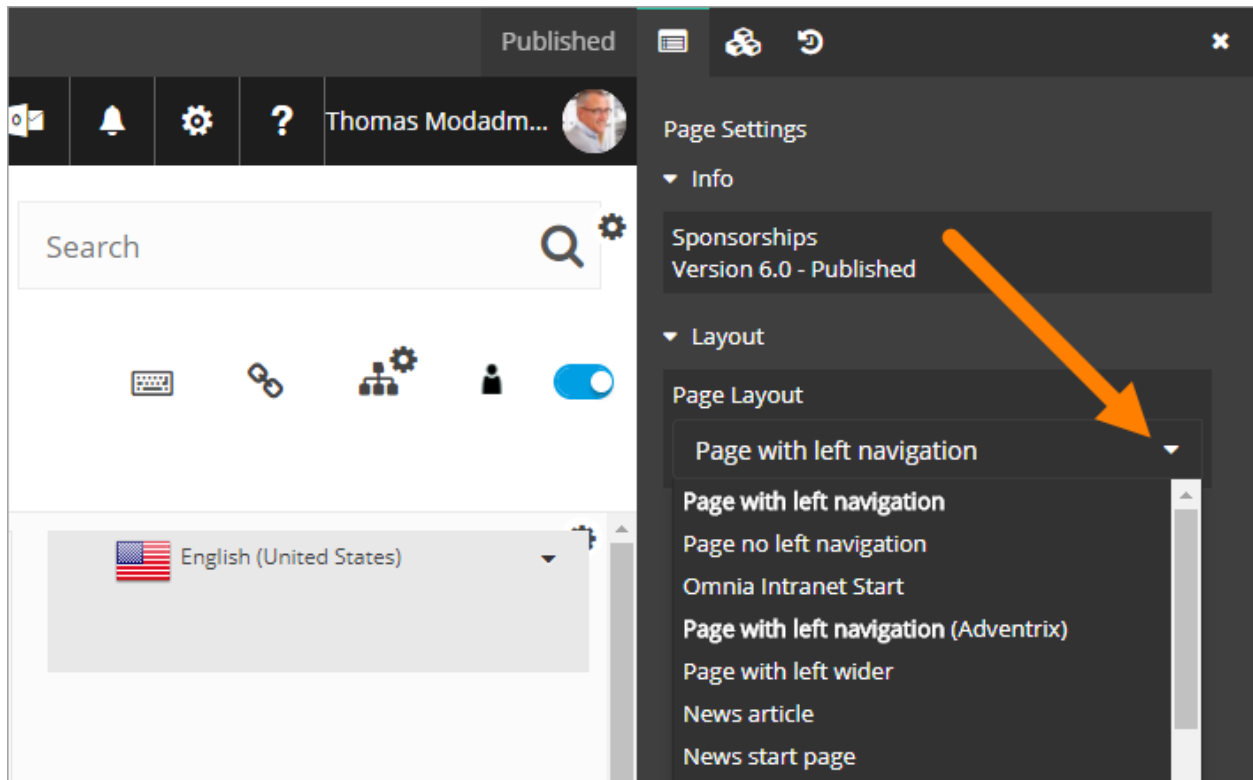
To select another Page Layout, do the following:

1. Go the page.
2. Open the administration menu.
3. Select “Edit page”.

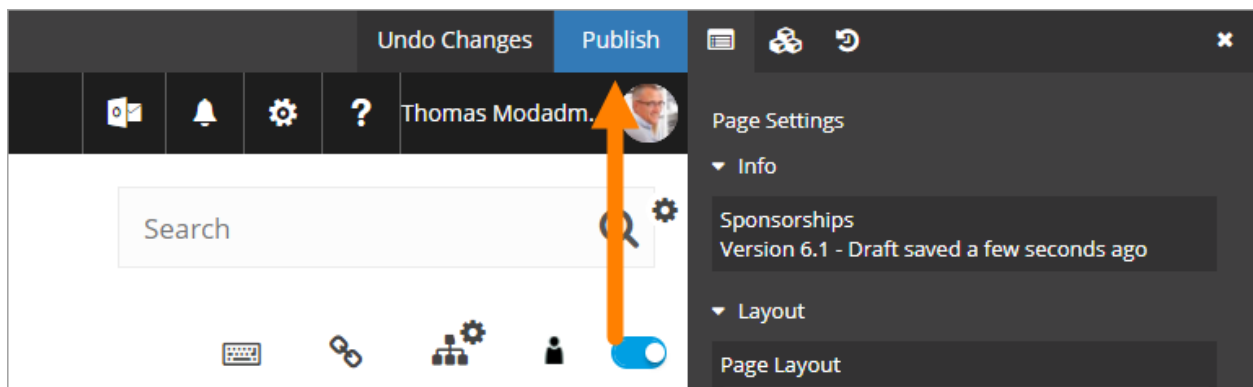
If you have the correct permissions, something like this will be shown:



4. Open the “Layout” list and select layout.



5. Make changes to the blocks, if necessary (see below).
6. Publish the page.



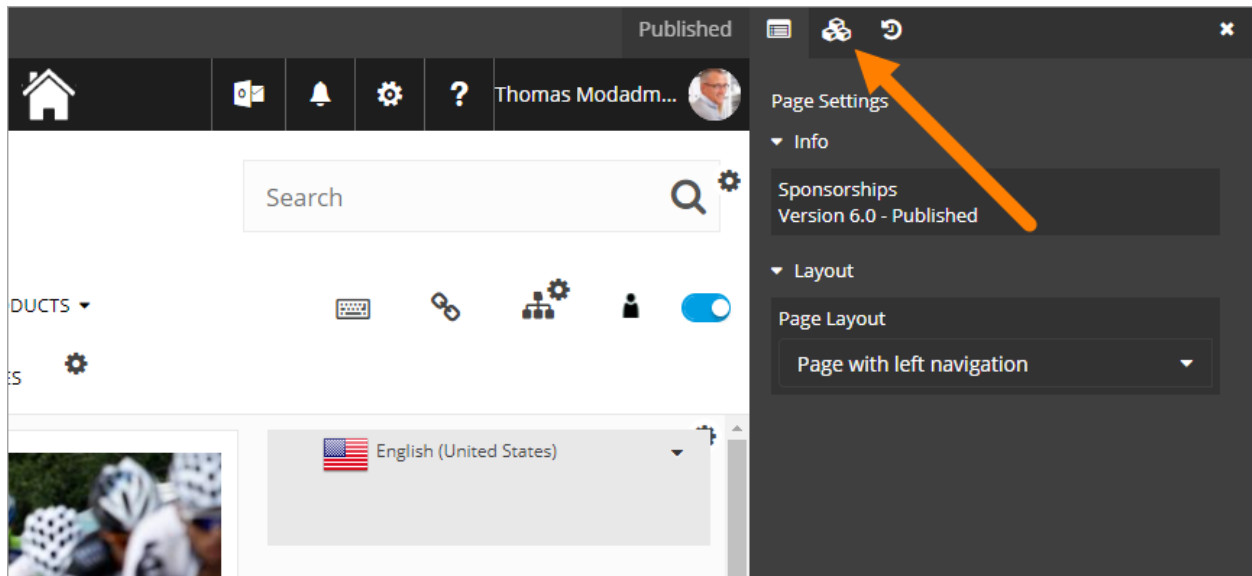
Working with blocks

When you have opened a Quick Page to edit the Page Layout, you can work with the blocks as described in this section. Don't forget to publish when you're finished!

Adding a new block

To add a new block:

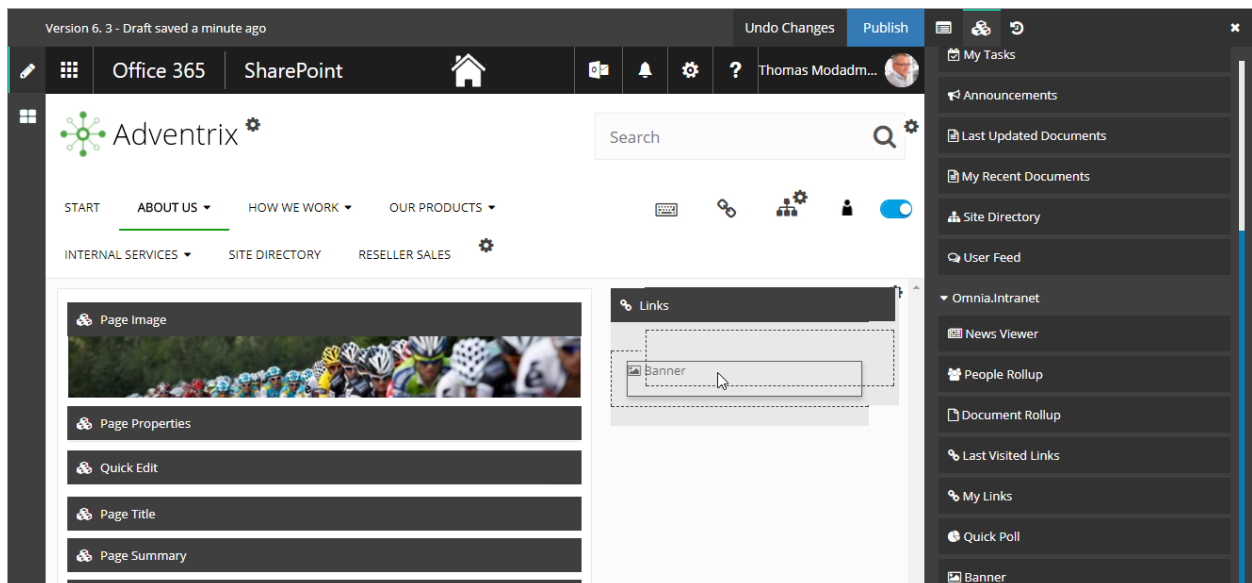
1. Open the Block list.



2. Drag the block to a Zone, and to the place you want in the Zone.

When you start dragging you can see where the zones are and which blocks are already in place in a Zone. You can place the new block anywhere within a Zone, normally both over and under other blocks.

When you drag the new block to a place where it's possible to place it, a dotted line is shown:



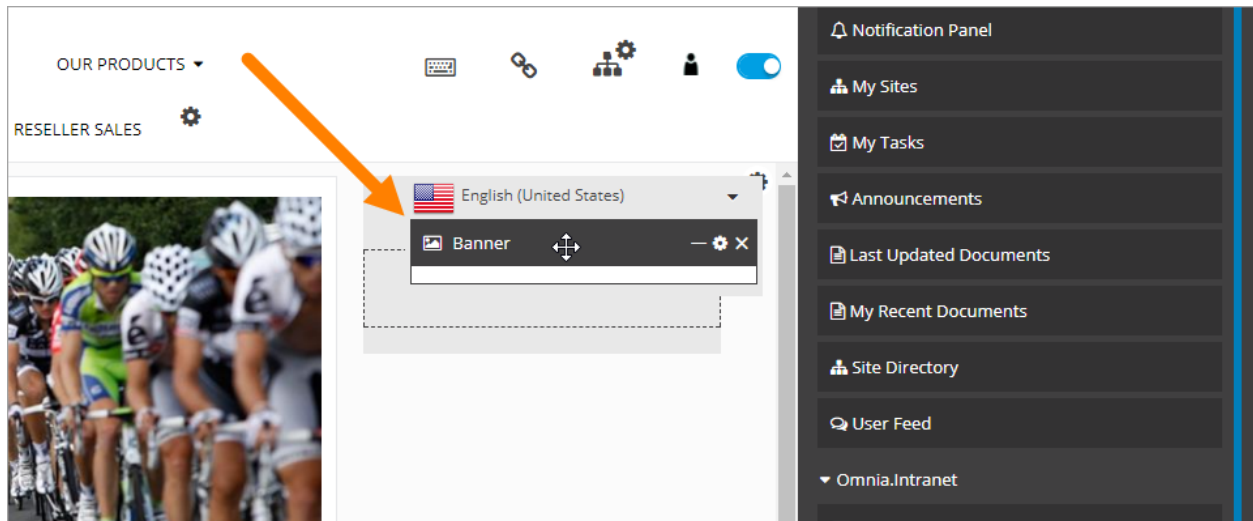
3. Just “drop” the block when you have dragged it where you want it.

Moving a block

To move a block:

1. Click on the block you want to move and drag it to the new place.

When just looking at the page it's not always obvious what is a block and what is not, but when you point at a block a black bar is shown:

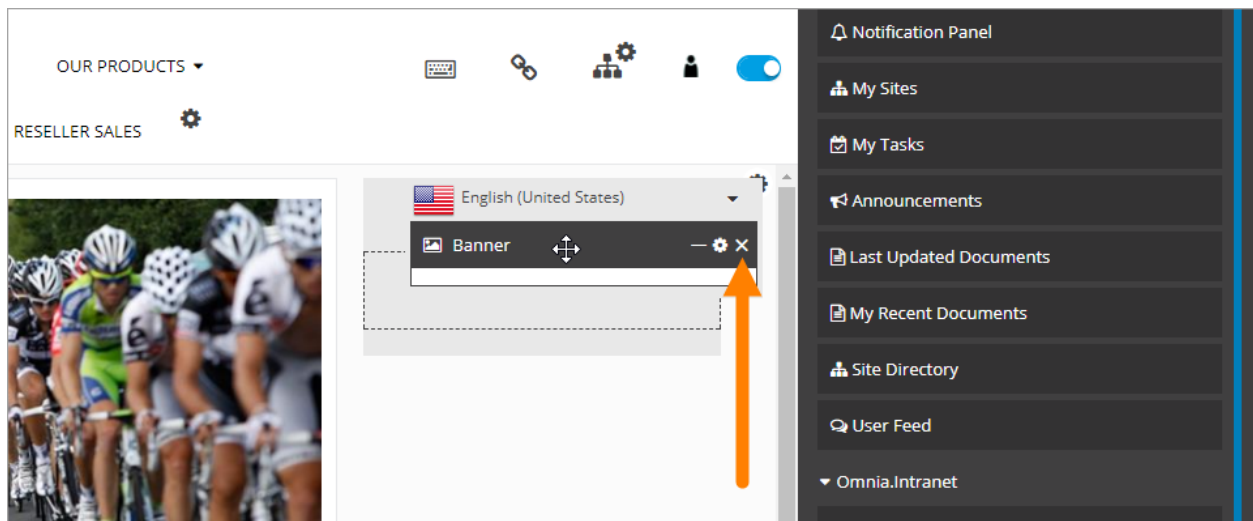


Note! Not all blocks can be moved. The layout can contain static blocks and they can not be moved.

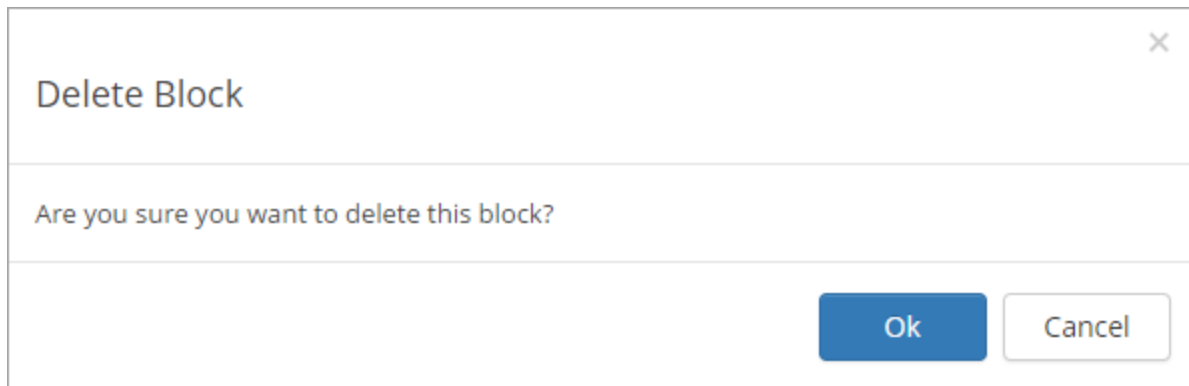
Deleting a block

If you need to, you can delete a block this way:

1. Point at the block.
2. Click the x.



The following is shown:



3. Click "OK" if you're sure, "Cancel" if you're not.

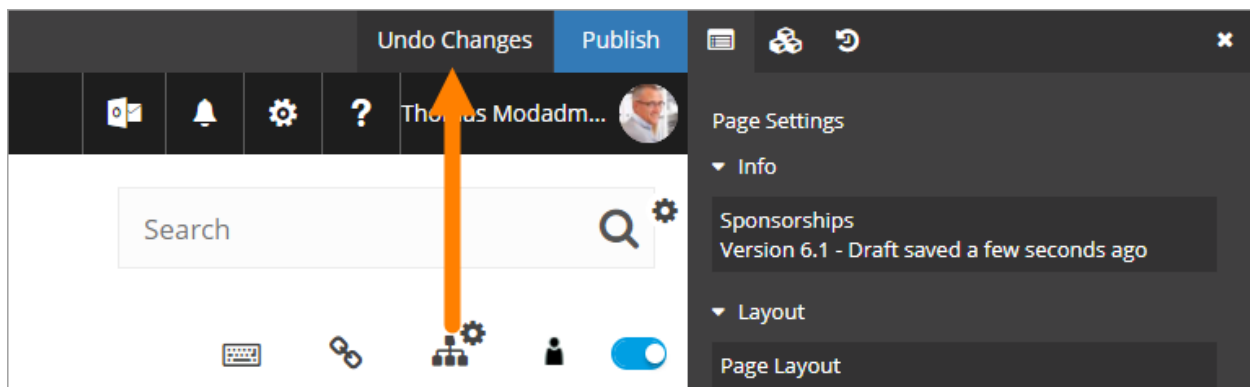
Note! Not all blocks can be deleted. The layout can contain static blocks and they can not be deleted.

Save, Undo Changes and Publish

You don't need to save. When you make any change the page layout is automatically saved and a new node in the Version History is created (see below).

If you don't want to save the changes you have made, you can undo these changes this way:

1. Click "Undo changes".



Note! When you undo changes ALL changes that are made since the last published version are removed, regardless of who made them.

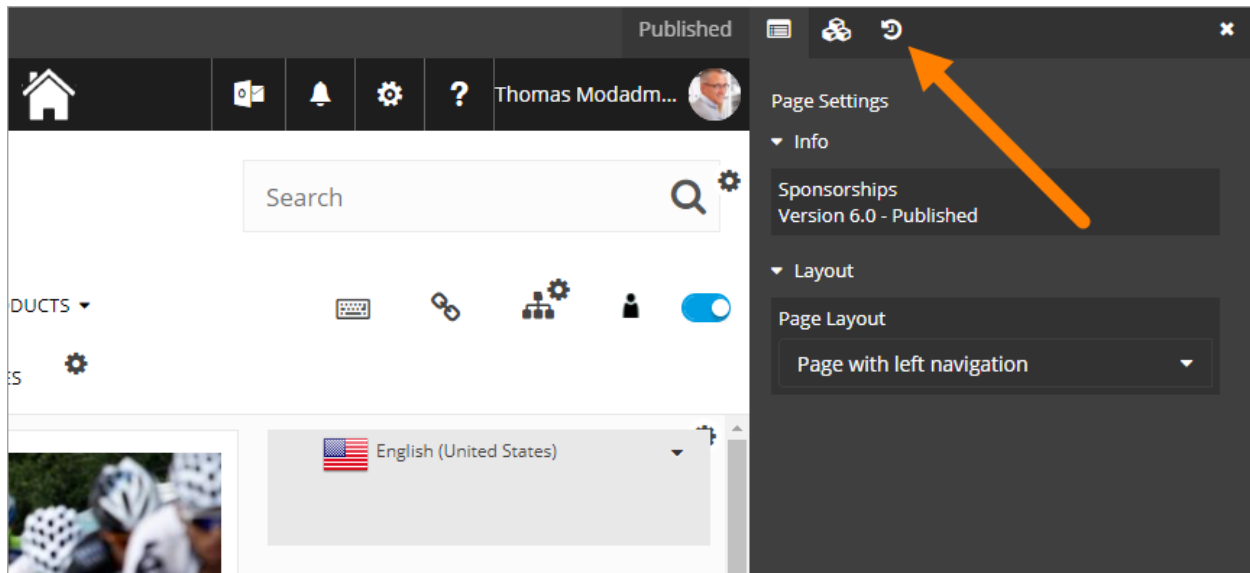
When it's time to publish the layout changes:

1. Click "Publish".

Version History

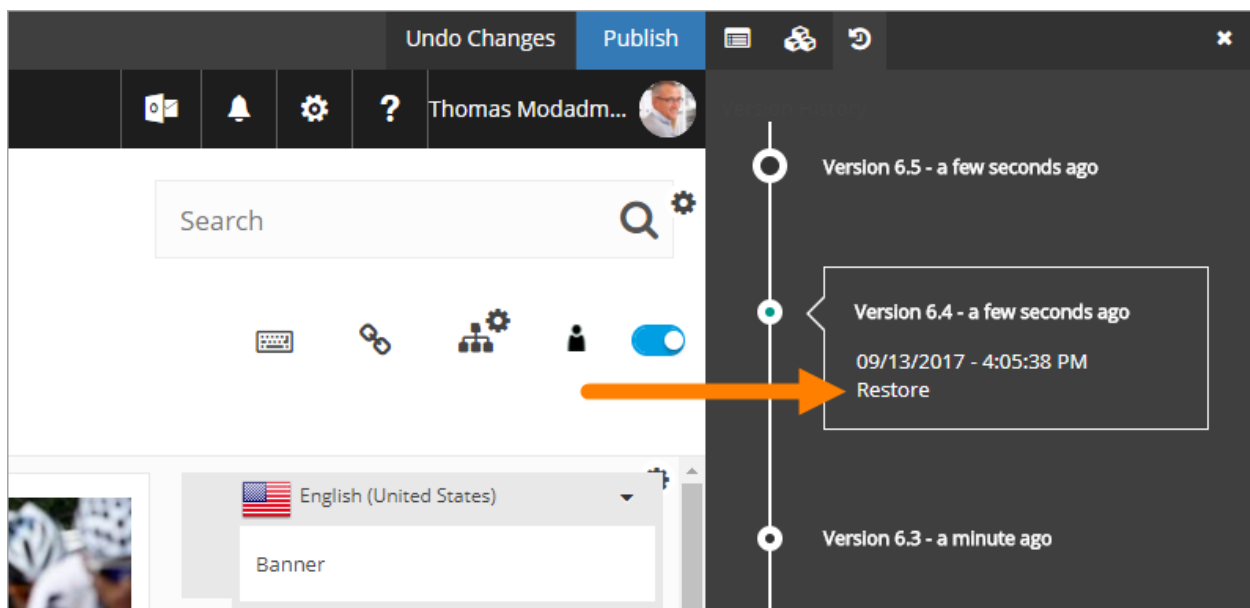
When you do any change in the layout for a Quick Page, a Version History node is created. You can use the Version History to go back to any earlier version of the layout. You edit the content the normal way.

1. Open "Version History".



Published versions are noted with an integer, work in progress with a decimal.

2. Select the version you want to go back to, and select “Restore”.

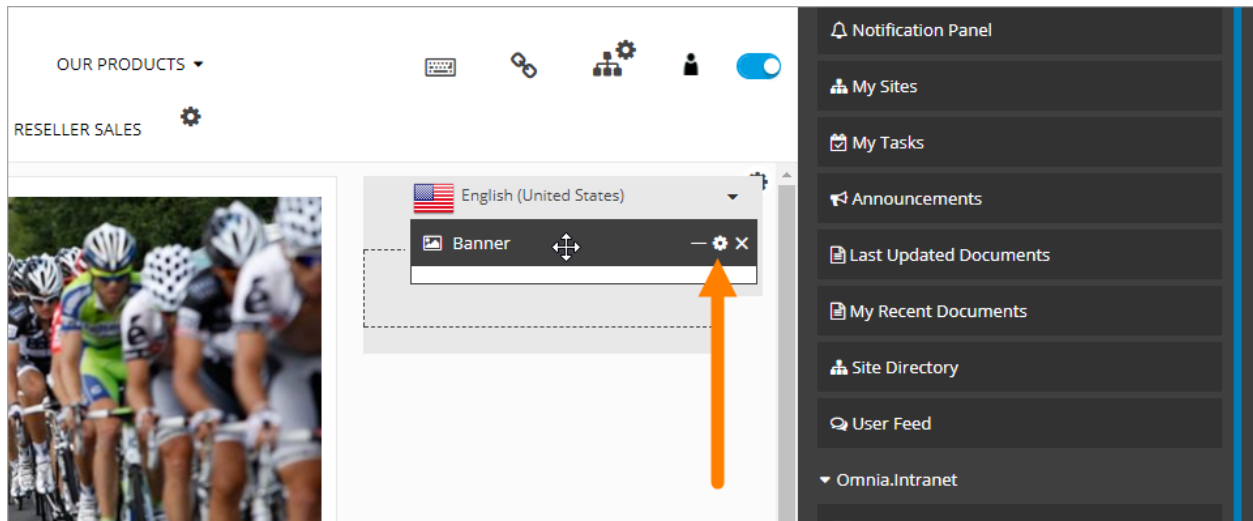


The selected version becomes the latest draft and a new node is created in the Version History. You can now continue working with layout drafts and publish when you're ready.

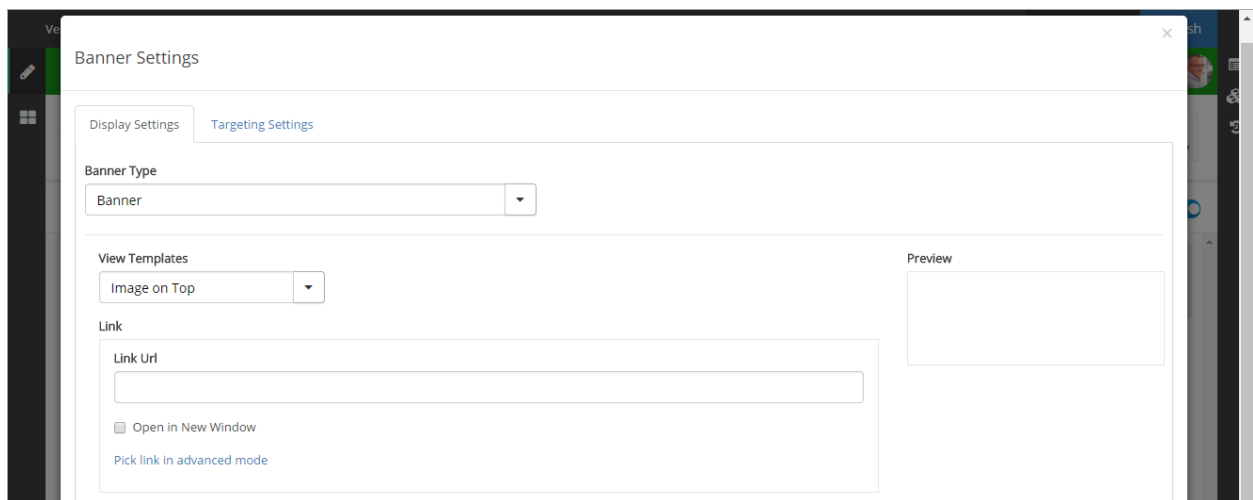
Editing settings for a control

What you actually add with a block is a control. To edit the settings for the control:

1. Point at the block so the black header is shown.
2. Click the cogwheel.



The settings for the control is shown (if any), for example:



Page Properties

The Page Properties page will display all list columns in the Pages library of the current site. It supports the following SharePoint data types:

- Single line of text
- Date and time
- Yes/No
- Person or Group
- Managed Metadata

The built-in fields Created, Created By, Modified and Modified By is also supported.

Content Management				
Permissions Enable Quick Pages Targeting Settings				
Page Properties				
Property	Edit mode	View mode	Show label	Required
Contact	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Article Date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Enterprise Keywords	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- **Edit Mode:** Check the properties that should be available for an editor in the Manage Content UI.
- **Group permission:** Use this field to set editor permissions to use the field. A good example is the Top Story field for news: if just a few news editors should be able to publish top stories, enter the applicable user group (which must have been created before you can do this) in the field. Note that it must be a *user group*. You can't add users directly in this field.
- **View Mode:** Check the properties that should be displayed on the web page, for users. Note that you should use either "View Mode" or "Show More", not both. If you select both, the field will be displayed twice.
- **Show more:** Select this if you don't want this property to be displayed on the web page directly. When "Show More" is activated, the property is displayed when a user clicks the link.
- **Shared:** Check if the value entered by the author for this property should be shared between language editions of a page. An example: If a contact person is displayed on a page, the same contact for all language editions of a page will be displayed. The editor can not enter different contact persons for different languages. If the editor should be able to enter different values for the property (in the example, different contact persons), this field must not be checked in this settings.
- **Show Label:** If you want to show the property label in "View Mode" next to the value, this box needs to be checked.
- **Required** If you select this, an editor must enter information for the property to be able to save a page.

You can use drag and drop to change the sort order.

A tip! Using the field "Review Date" is a convenient way of keeping track of when a page may need to be updated. Any page with a passed Review Date will then be noted on the Content Management start page. For this to work, "Edit mode" must be selected here for the field.

Page Footer

Setup Page Footer

1. Go to Omnia Admin > Features.
2. Activate the tenant feature "Omnia Intranet Page Footer".
3. Go to Page Footer and add a new footer for one of your Omnia Profiles.

Page Footer

Omnia Profile

Intranet

▼

Save

Clear

There is no page footer settings

Left

Middle

Right

Width

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Demo Company Copyright 2018

Text color

#FFFFFF

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Background color

#232c62

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☐ Show Gridlines

Margin top

20

px

Padding

20

px

Demo Company Copyright 2018

Use this option to place and edit a footer on all pages in Omnia that uses a certain Master Page.

1. Select Feature.
2. Then select Master Page.











You can add content for three footer positions. Use the tabs do do that.


Page Footer

Feature **Omnia Core Master Page** Master Page **omnia.master** **Save** **Clear**

Left Middle Right

Width 100 %

B ***I*** **U** “ Paragraph          











Copyright Adventrix 2013 - 2016  Adventrix on Facebook


The three tabs work the same way. You of course don't have to use all three positions. Using just the “Left” tab and instead using tab positions or a table, could also work.

Use “Widths” to set the width for each position (Left, Middle, Right). Set the width in pixels using the left field, or as a percentage, using the right field.

Left **Middle** Right

Width 100 %











B ***I*** **U** “ Paragraph          


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Use the content area to add text, images or links.

Left Middle **Right**

Width 100 %

B ***I*** **U** “ Paragraph          

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You can set Text color, Background color, Margin and Padding for the footer. Below these setting you can see a preview.

The screenshot shows the footer configuration interface. At the top, there are four settings: 'Text color' set to #ffffff, 'Background color' set to #179c17 with a 'Show Gridlines' checkbox, 'Margin top' set to 10 px, and 'Padding' set to 10 px. Below these settings is a horizontal slider bar. A white handle on the slider is positioned at the right end, with the label '688px' above it. Below the slider is a green rectangular preview of the footer. The preview contains the text 'Copyright Adventrix 2013 - 2016' on the left and a Facebook icon followed by 'Adventrix on Facebook' on the right.

The margin is space between the footer and the main part of the page. Padding is top and bottom spacing within the footer.

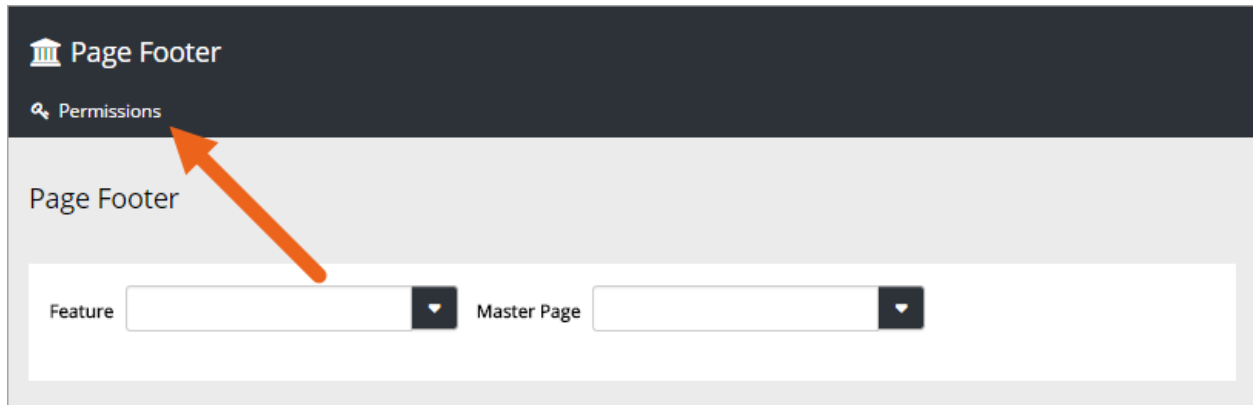
You can also use the preview at the bottom to see what the footer will like in different window widths, for example on mobile devices. Just “grab” the handle and slide to the width you wish to preview.

This screenshot is similar to the one above, showing the same footer settings. However, the slider handle is now moved to a different position, and the label above it is '390px'. An orange arrow points from the top right towards the slider handle, indicating the action of dragging the handle to a new width. The green footer preview below the slider is scaled to fit the 390px width, showing the text and Facebook link in a smaller size.

Don't forget to save your changes.

Page Footer Permissions

You need to be Global Admin to use this option. If any other users should be able to work with Page Footers, click “Permissions” and add them.



Quick Pages

Quick Pages will load much faster (it's really a huge difference!). Quick pages has no support for traditional Sharepoint web parts. Only Quick Edit is available for a Quick Page, the Sharepoint mode "Advanced mode" is not available for such a page.

When Quick Pages is enabled for a site (yes, you activate Quick Pages per site), there can be a checkbox available for the page editor that can be used to decide to use Quick Pages or not for each page in the site.

To enable Quick Pages, do the following:

1. See to that the correct site is the actual site.
2. Open Omnia Admin and go to "Content Management".
3. Click "Enable Quick Pages".
4. Select option here:

Use the settings this way:

- **Yes, disable support for legacy webparts:** Support for legacy webparts is disabled completely, all pages are Quick Pages. No checkbox is shown for the author.
- **Yes:** Support for legacy webparts is enabled. A checkbox is shown, but is not selected by default, meaning all pages are Quick Pages by default.
- **Yes, but support legacy webparts by default:** Support for legacy webparts is enabled. A checkbox is shown, and is selected by default, meaning an author has to deselect the checkbox to make a page into a Quick Page.
- **No:** Quick Pages is not used, all pages are legacy pages. A checkbox is not shown.

If a checkbox is shown, the editor will find it here:

The screenshot shows the 'Manage Content' window. On the left, a tree view shows the content structure: Start > News > About Us > How we work > Our Products > Product Portfolio > Extreme Bikes > City Bikes > Kids Bikes > Cheetah > **Red Hawk** (selected) > Tiger > Kazam > Mystic. The main editing area is for the 'Red Hawk' page. It has tabs for General, Content, Links, Properties, Navigation, Site, and Statistics. The 'General' tab is active, showing: Status: Draft; Title: Red Hawk; Summary: The Red Hawk is the best option for the lively 6-7 year old kids. And the new X9 is even more exciting than the previous models.; Image: /global-image-bank/PublishingImages/Red-Hawk.jpg; and Enable legacy web parts: ☐. An orange arrow points to the 'Enable legacy web parts' checkbox.

In this example Quick Pages is on for this page as enabling legacy web parts is not activated.

How to work with Quick Pages is described on the page “Manage Content”, see: [Manage Content](#)

Comments and Likes

Prerequisites: The Omnia.Intranet extension needs to be installed and the tenant feature Omnia Intranet Social Core needs to be activated.

When the feature “Omnia Intranet Social” is activated for a site, the control “Likes and Comments” becomes available on that site. The most common use is in a News Center, but the feature can be activated for any publishing site.

The control makes it possible for the end user to like and comment a specific web page. It is also possible to reply to comments.

👍 UNLIKE You, Anders Fagerlund and Jörgen Bjerkesjö like this

3 comments



Anders Fagerlund

Nice article! Where can I find more information about the marketing campaign?

[Reply](#) Jan 7, 2016, 8:17



Jörgen Bjerkesjö

@Anders Fagerlund : Browse to the MTB 200 product page on the intranet. All information you need should be available there.

[Reply](#) Jan 7, 2016, 8:19



Anders Fagerlund

@Jörgen Bjerkesjö : Aha, nice...thanks!

[Reply](#) Jan 7, 2016, 8:20



ADD COMMENT

It is possible for the end user to edit and delete a comment, made by the user, by clicking the edit pencil icon.



Anders Fagerlund

@Jörgen Bjerkesjö : Aha, nice...thanks!

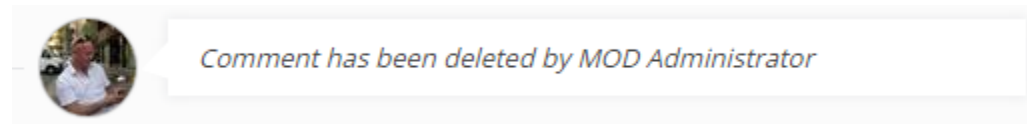
[Reply](#) Jan 7, 2016, 8:31

Edit

Delete

When a comment is deleted it works this way: If there are now answers to the comment it will just be removed. If

there are answers, the comment will be replaced with a text that states that it has been deleted and by whom. Everyone can delete their own comments. A Site Collection administrator can delete any comment.



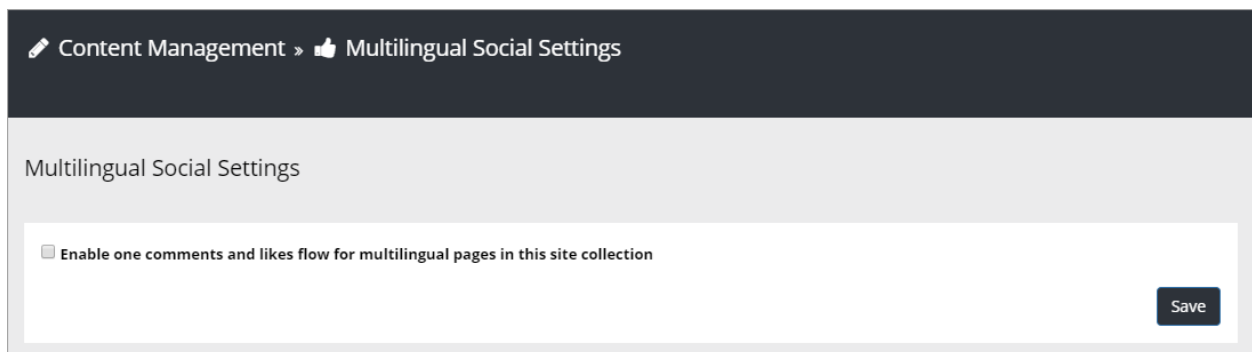
To change the settings for the control, activate the edit switch and click the settings gear.

This will open the settings dialog.

- **Enable Likes:** Defines whether it should be possible for the end user to use Likes in the site or not.
- **Enable Comments:** Defines whether it should be possible for the end user to use comments in the site or not.

Comments and multilingual sites

The default setting is that comments are visible per language only, English comments on English pages only, Swedish comments on Swedish pages only, and so forth, but it's possible to set that all comments should be shown on all pages, regardless of language set for the page. The setting is done in Omnia Admin under Content Management/Multilingual Social Settings.



The setting is valid for the whole site collection.

More on Likes and Comments

Users can like comments as well as pages.

A user can click the hand to see a list of the users that has liked the page or comment.

A user writing a comment can use mentions to send a message to someone, for example the author of the page (news page or other).

Note! Likes on comments does not affect trending in any way.

Multi Lingual Pages

Setup Multi Lingual Pages

1. Go to SharePoint Admin Center > term store.
2. Make sure that you are a Term Store Administrator.
3. Add the languages you would like to support in the solution as Working Languages in the term store.

Default Language

Select the default language for all Metadata in the system. All terms must have a label defined in their default language.

English ▼

Working Languages

Select the "translation of" languages for terms in the term store. This will allow a term to have language specific labels and translations.

Select languages from:

Installed language packs ▼

English
Estonian
Italian
Kazakh
Vietnamese

Add >>

<< Remove

English
Swedish

4. Go to Omnia Admin > System > Caching.
5. Delete all keys that belong to the Region "intranetnavigationlanguagecache".

:hing.navigationlanguages_https://m365x167835.sharepoint.com/sites/intra	intranetnavigationlanguagecache	🗑
:hing.navigationlanguages_https://m365x167835.sharepoint.com/sites/extranet	intranetnavigationlanguagecache	🗑
:hing.navigationlanguages_https://m365x167835.sharepoint.com/sites/news	intranetnavigationlanguagecache	🗑

6. The selected languages should now appear in Manage Content.

Manage Content

English

×

▼

English

Swedish

Edit

General

You need to enable MUI in the publishing site if you want to:

- Make sure that system labels, and not only content, are translated to the end user.
- Make sure that the selected language on a web page defaults to the preferred language of the logged on user.

Follow these steps to enable MUI.

7. Go to the start page of the main publishing site.
8. Go to Site Settings > Language Settings.
9. Add Alternate language(s) and save.

You can decide whether a page property should be for a specific language or if it should be shared between the different translations.

10. Go to the start page of the main publishing site.
11. Go to Site Contents > Pages library settings.
12. Create a new column.

Name and Type

Type a name for this column, and select the type of information you want to store in the column.


Column name:

Owner

The type of information in this column is:

- ☐ Single line of text
- ☐ Multiple lines of text
- ☐ Choice (menu to choose from)
- ☐ Number (1, 1.0, 100)
- ☐ Currency (\$, ¥, €)
- ☐ Date and Time
- ☐ Lookup (information already on this site)
- ☐ Yes/No (check box)
- ☒ Person or Group
- ☐ Hyperlink or Picture
- ☐ Calculated (calculation based on other columns)
- ☐ External Data
- ☐ Managed Metadata


13. Go to Omnia Admin > Content Management > Page Properties.
14. Add the Owner property to edit and view mode and make sure it is Shared.

Page Properties: Intranet 							
Property	Edit mode	Group permission	View mode	Show more	Shared	Show label	Required
Owner	<input checked="" type="checkbox"/>	<input type="text"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contact	<input checked="" type="checkbox"/>	<input type="text"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Modified		<input type="text"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Change Default Language

A common implementation problem is that a tenant is installed with two working languages in the term store (for example English and Swedish) and English is default, but the main publishing site is set up with Swedish. This could lead to non-wanted behavior in Manage Content. It is possible to change the default language in the term store afterwards, but it requires some manual work and should be done off working hours for customers that are already in production.

1. Go to SharePoint Admin Center > term store.
2. Make sure that you are a Term Store Administrator.
3. Change the Default Language.

Page Properties: [Intranet](#) 

Property	Edit mode	Group permission	View mode	Show more	Shared	Show label	Required
Owner	<input checked="" type="checkbox"/>	<input type="text"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contact	<input checked="" type="checkbox"/>	<input type="text"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Modified		<input type="text"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- Go to Omnia Admin > System > Caching.
- Delete all keys that belong to the Region “intranetnavigationlanguagecache”.
- Go to start page of the main publishing site.
- Open Manage Content. The following message should now appear on the start node.

Click on 'Create Translation' to create a version in English of the page **Start**

Repeat the same procedure for all pages in the navigation structure.

In Omnia editors can work with more than one Language Edition of the content for a page. There’s no actual settings specifically for languages in Omnia Admin, but there are some prerequisites:

- The Omnia Tenant Feature “Omnia Intranet Multi Lingual” must be active.
- The languages to be used must be defined in the Term Store, under “Working Languages”.
- If any Page Properties should be shared between languages, you must select “Shared” for these properties under Content Management/Page Properties in Omnia Admin.

Note! This has to do with the content of publishing pages only. Different languages for menus, labels etc are handled through System/Localization.

Trending Pages

Setup Trending Pages

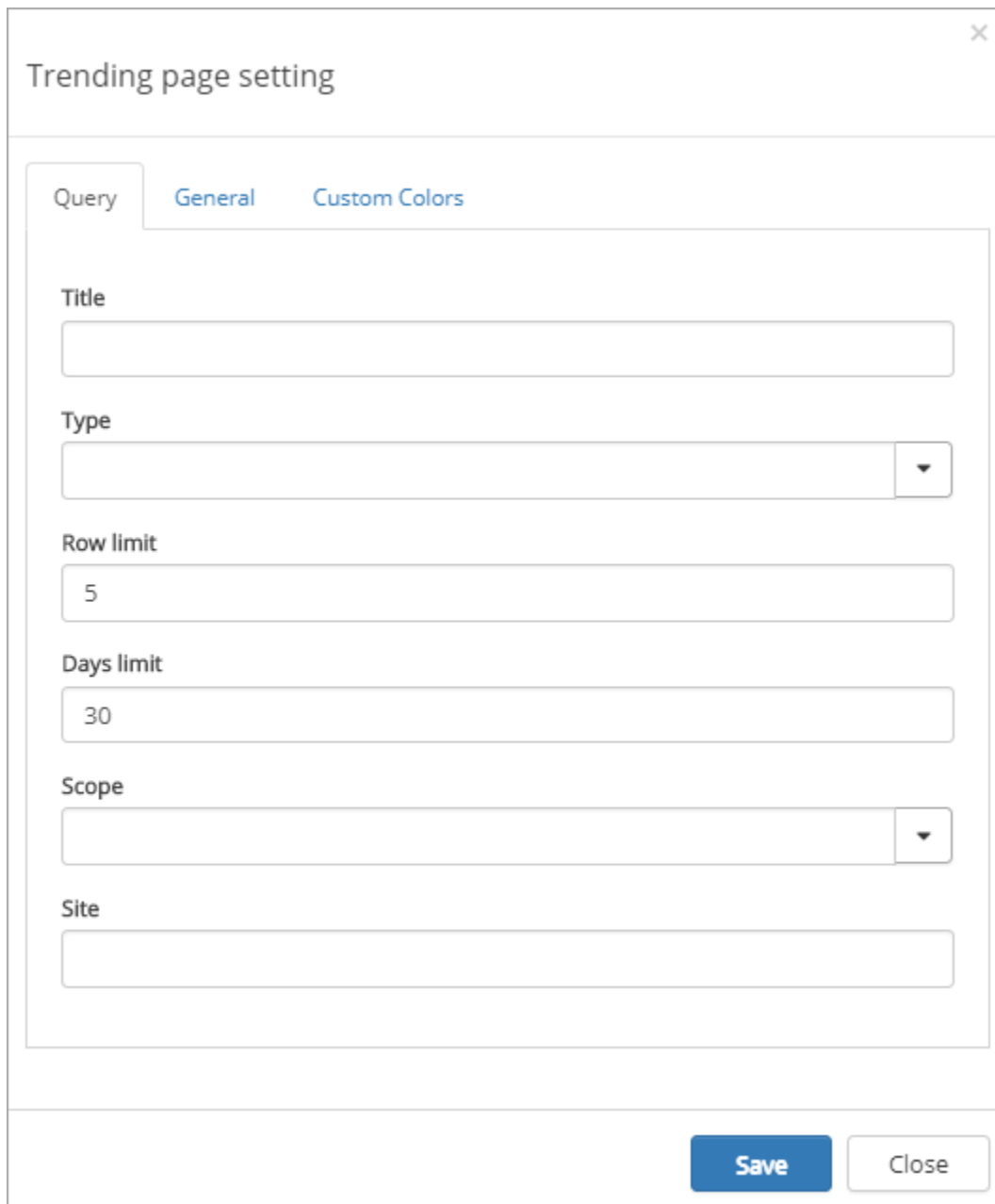
- Go to Omnia Admin > Features.
- Activate the tenant scoped feature “Omnia Intranet Trending Pages Core”.
- The block “Trending Pages” is now available in the solution.
- If you want to add support for the Trending Pages legacy web part, go to Omnia Admin > Features and activate the site collection scoped feature “Omnia Intranet Trending Pages Web Part”.

You can use the Trending pages control to display Most liked pages, Most viewed pages or Most commented pages.

The control can be used on any publishing page and is available as a block for Quick Pages or as a web part, and you can of course use several instances of this control on a page.

Settings for the control

The settings consists of three tabs:



Trending page setting

Query General Custom Colors

Title

Type

Row limit

5

Days limit

30

Scope

Site

Save Close

The Query tab

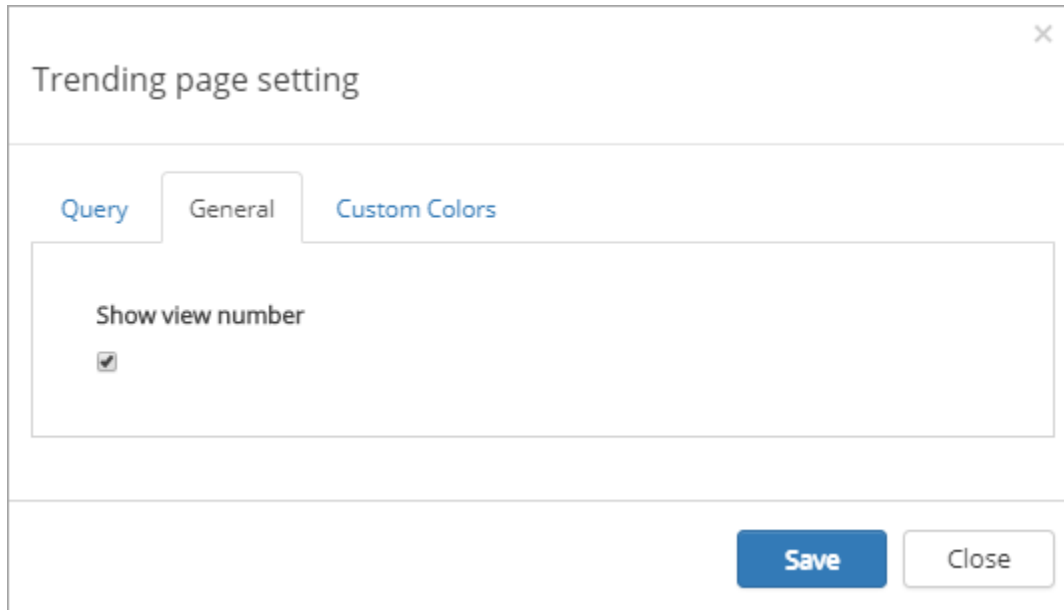
On this tab the following settings are available:

- **Title:** Enter the title to be displayed for the control.
- **Type:** Select type of list - Most commented, Most liked or Most viewed.
- **Row limit:** Enter number of rows for each “page” in the list.

- **Days limit:** Select number of days for the query.
- **Scope:** Select scope - Tenant, Site Collection or Site.
- **Site:** When you select “Site Collection” or “Site” above, a site address is displayed here. You can add another site address if needed.

The General tab

On this tab you can select to show number of views or not.



The screenshot shows a dialog box titled "Trending page setting" with a close button (X) in the top right corner. Below the title bar, there are three tabs: "Query", "General", and "Custom Colors". The "General" tab is currently selected. Inside the "General" tab, there is a section titled "Show view number" with a checked checkbox. At the bottom right of the dialog box, there are two buttons: "Save" (in blue) and "Close" (in white with a grey border).

The Custom colors tab

You should primarily set colors through Theme colors in Omnia Admin (System/Settings/Default colors). If you still would like custom colors for the control, you can set them using this tab.

Trending page setting

Query

General

Custom Colors

Border color

Background color

Text color

Preview

Page 1

Save

Close

Web Editor Reports

When “Content Management” is selected in Omnia Admin, the first page displays an overview over the pages in the Site Collection. Here’s an example:

All Pages in this Site Collection		
Total number	Not modified for a year	Past review date
26	0	1

My Pages in this Site Collection		
Total number	Not modified for a year	Past review date
25	0	0

Note the two units “Past review date”, one for “your” pages, and one for all other pages. Your pages are all pages you are Review Responsible for (see below under Page Review settings for more information). By clicking the unit you can see a list of the pages in question. You can even click the link to the page to go there.

Click for more details. Here’s an example from a Past review date report:

Scope		Status	
All Pages	▼	Past review date	▼
Page	Contact	Modified	Review Date
MTB 30	Alex Wilber	Oct 27, 2017	Jun 26, 2017
<div> Previous 1 Next </div>			

Tip!: There’s also a number of reports available for publishing pages, when you edit a page, see (under “Reports, almost at the end of the page): [Manage Content](#)

Page Review

If Page Review is active, it works like this: When a page is past it’s review date, one of two messages can be shown, depending on settings. One message is just shown for editors, the other for both editors and users. See below for more information about the settings.

The message that are displayed solely for editors can look like this:

If the page is ok the editor can directly update the review date, by clicking “here” (if the option is activated in Omnia Admin, see below), and then the following is shown:

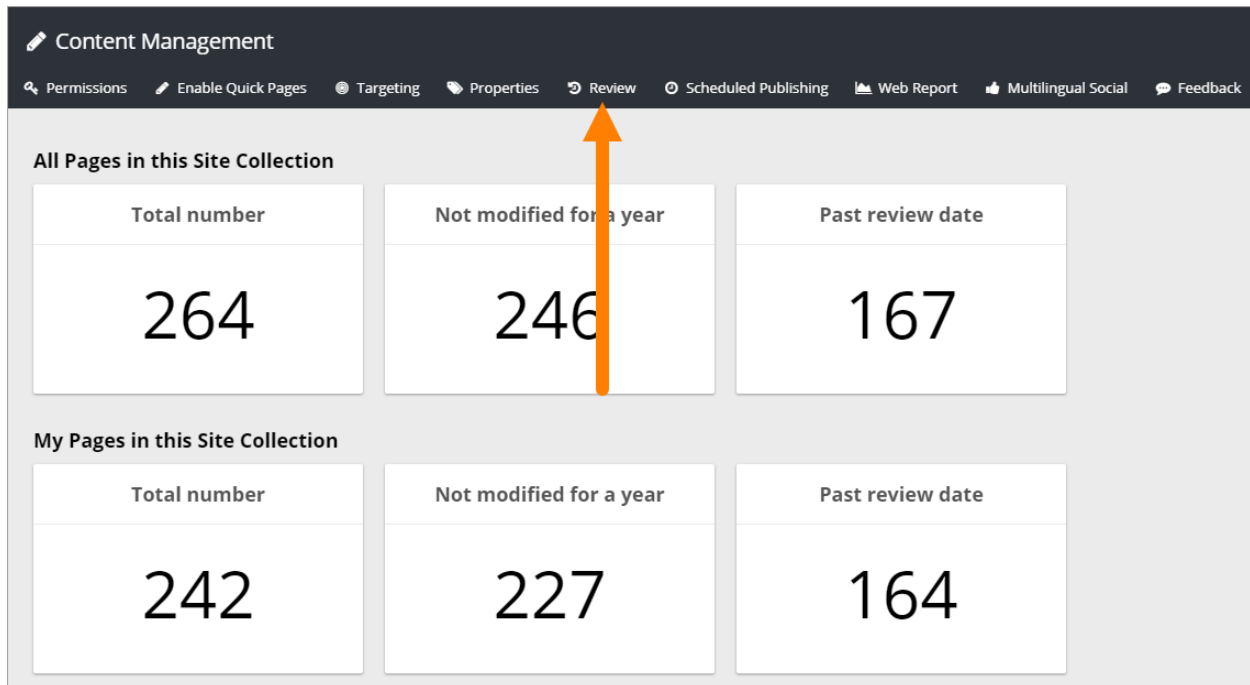
Suggested review date depends on settings in Omnia Admin, see below.

The editor can just click “Update” and it’s done!

Page Review settings

Under “Content Management” in Omnia Admin, an administrator can handle a number of settings for page review. Note that these settings are set per site.

The settings are available here:



Content Management

Permissions Enable Quick Pages Targeting Properties **Review** Scheduled Publishing Web Report Multilingual Social Feedback

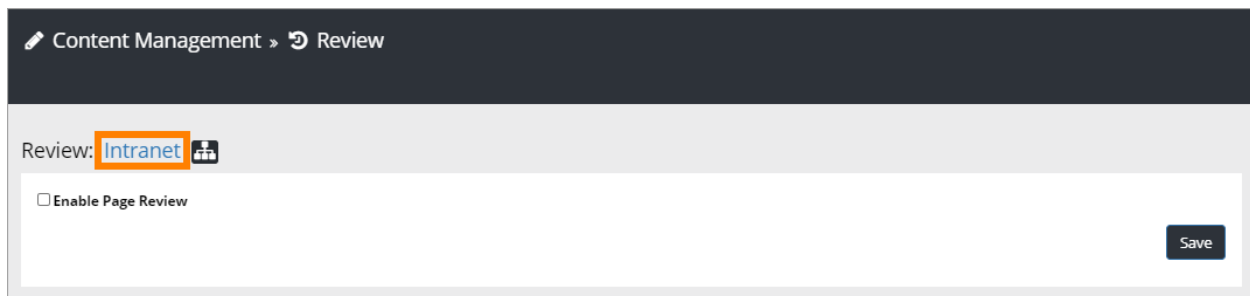
All Pages in this Site Collection

Total number	Not modified for a year	Past review date
264	246	167


My Pages in this Site Collection

Total number	Not modified for a year	Past review date
242	227	164

The active site which you set the settings for is shown here:



Content Management > Review

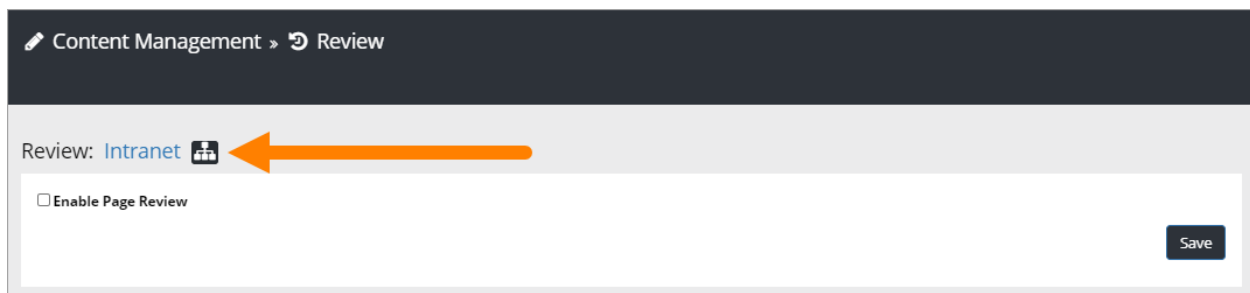
Review: **Intranet** 

☐ Enable Page Review



Save

In the above example, it's the site Intranet.

To select another site to set review settings for, click the icon:



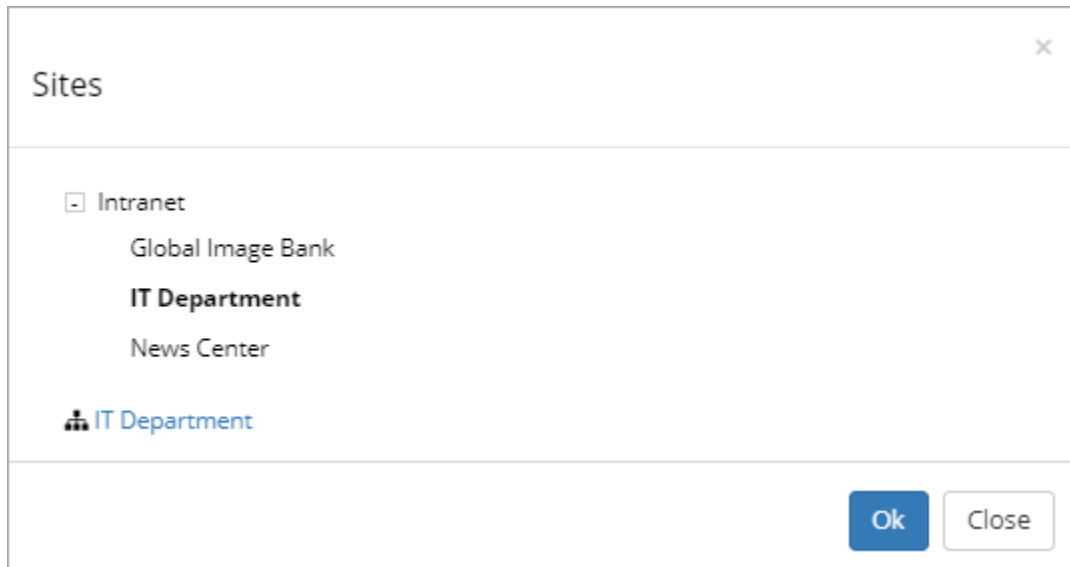
Content Management > Review

Review: Intranet  

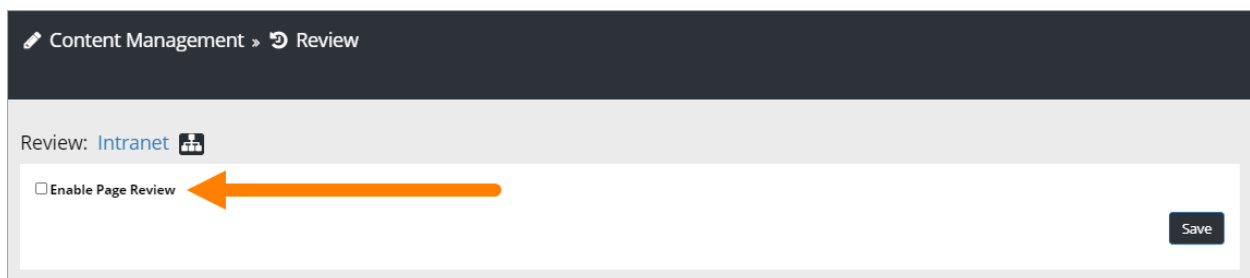
☐ Enable Page Review

Save

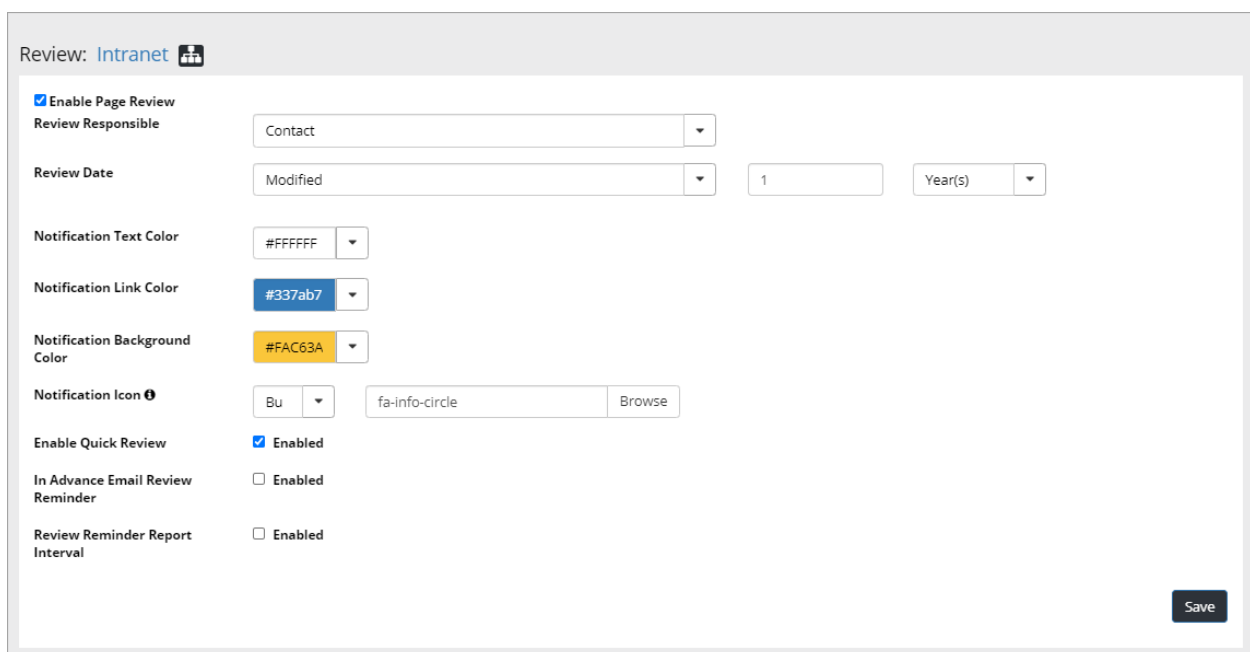
Click the site in the list. Note the link at the bottom, you can use to go to the site and have a look, if in doubt.



The first step, when the correct site is selected, is to decide if Page Review should be active or not. If it should be active, select “Enable Page Review”.



Then the following can be set:

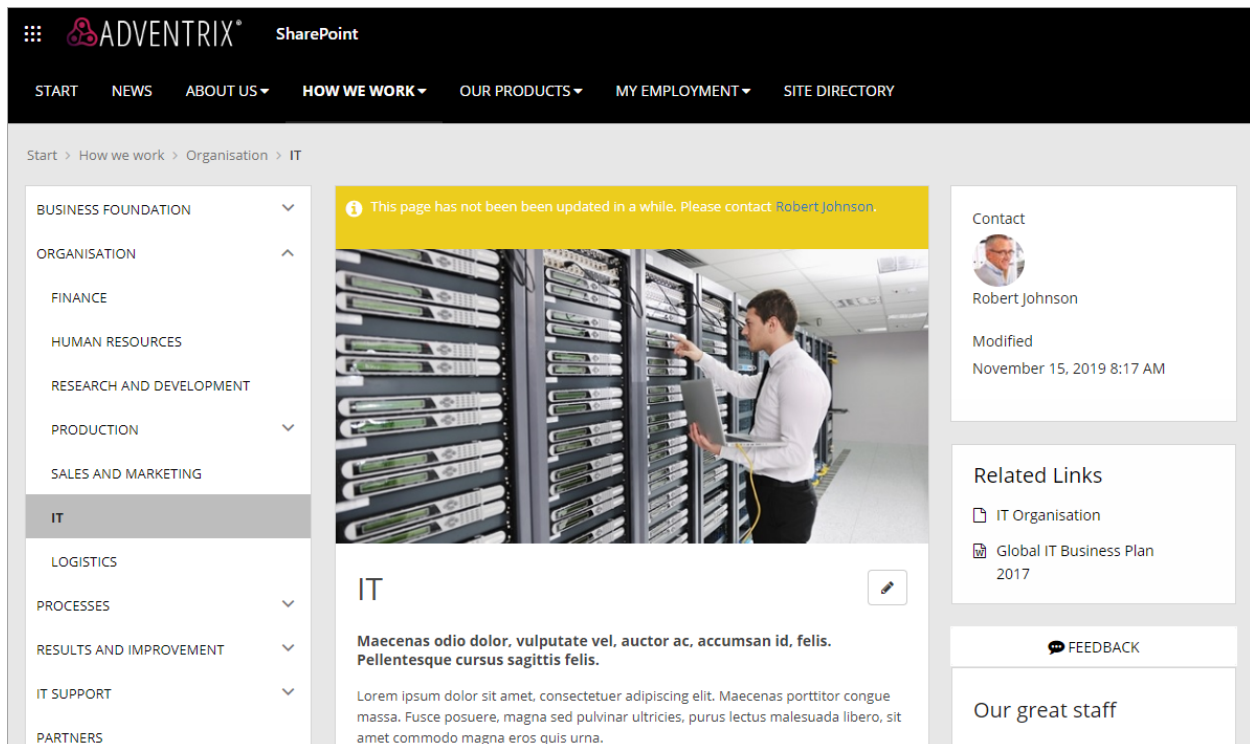


- **Review Responsible:** Select property in the list. The Review Responsible is notified by an e-mail when the

review date is passed.

- **Review Date:** First select property that the date will be counted on, then set interval - number of days, months or years.
- **Notification Text Color:** Set the color for the text, link and background for the notification on the page (see above for an example).
- **Notification Link Color:** Set the color for the link, in the review text.
- **Notification Background:** Here you can set the background color for the review notification.
- **Notification Icon:** You can also select an icon for the notification - Built in or Custom, and then select icon. If you select “Custom”, you can choose any image as icon.
- **Enable Quick Review:** Select to enable Quick Review or not. If Quick Review is active, the link “here” is shown in the notification (see above) so the editor can change review directly. In this case, the message is shown only for editors. If this option is not active the notification is slightly different, and is also shown for users. See below for an example.
- **In Advance Email Review Reminder:** Select this option if the review responsible should be notified before review date has passed, and then set the number of days.
- **Review Reminder Report Interval:** If this option is not active, the review responsible will be notified once for each site that needs to be reviewed. If you activate this option, you set the number of days, months or years for the interval between notifications for the review reminder report. This means the review responsible will receive additional reminders if a site is not reviewed.

The review notification on the page can look like this when Enable Quick Review is NOT active:



Note the link to the review responsible instead of the “here” link, as seen in the example above. Also note that this message is shown for both editors and users.

Third Party Statistics

Setup Third-party Statistics

1. Create a new Account in Google Analytics. Register the tenant root url as site address.
2. Copy the Account Id to Notepad for later use.
3. Go to Omnia Admin > Features.
4. Activate the tenant scoped feature “Omnia Statistics Provider Core”.
5. Go to Statistics Provider and put in the Google Analytics script referencing your Account Id.

Script 1

```
(function(i,s,o,g,r,a,m){i['GoogleAnalyticsObject']=r;i[r]=i[r]||function(){(i[r].
→q=i[r].q||[]).push(arguments)},i[r].l=1*new Date();a=s.createElement(o),m=s.
→getElementsByName(o)[0];a.async=1;a.src=g;m.parentNode.insertBefore(a,m)
→})(window,document,'script','https://www.google-analytics.com/analytics.js','ga');
ga('create', 'UA-[Put in your account Id]-1', 'auto');
ga('send', 'pageview');
```

Script 2

```
ga('set', 'page', pageUrl);
ga('send', 'pageview');
```

To be able to use this feature, you have to add a script below from a third-party statistics provider. This script will be added to all pages in this site collection.


```
1 (function(i,s,o,g,r,a,m){i['GoogleAnalyticsObject']=r;i[r]=i[r]||function(){
2   (i[r].q=i[r].q||[]).push(arguments)},i[r].l=1*new Date();a=s.createElement(o),
3   m=s.getElementsByName(o)[0];a.async=1;a.src=g;m.parentNode.insertBefore(a,m)
4   })(window,document,'script','https://www.google-analytics.com/analytics.js','ga');
5
6   ga('create', 'UA-113302662-1', 'auto');
7   ga('send', 'pageview');
```


To make analytic scripts work on quick pages, often an reload script is required. The reload script can use the variable pageUrl to know which page is being viewed.

```
1 ga('set', 'page', pageUrl);
2 ga('send', 'pageview');
```

For statistics in Omnia, use this Omnia Admin option to add the script you get from your statistics provider. Don't forget to save.

You must be global admin to be able to this. If other colleagues should be able to add scripts here, add them using the “Permissions” option.

 **Statistics Provider**

 Permissions

To be able to use this feature, you have to add a script below from a third-party statistics provider. This script will be added to all pages in this site collection.

Save

1.5.3 News

News Setup

Setup News Center

1. Go to the start page of a publishing site.
2. Create a new sub site.

Title and Description

Title:

Description:

Web Site Address

URL name:

Template Selection

Select a language:

Select a template:

A blank site for expanding your Web site and quickly publishing Web pages. Contributors can work on draft versions of pages and publish them to make them visible to readers. The site includes document and image libraries for storing Web publishing assets.

Permissions

You can give permission to access your new site to the same users who have access to this parent site, or you can give permission to a unique set of users.

User Permissions:

- ☐ Use same permissions as parent site
- ☒ Use unique permissions

People and Groups › Set Up Groups for this Site ⓘ

Visitors to this Site
Visitors can **read** content in the Web site. Create a group of visitors or re-use an existing SharePoint group.

☐ Create a new group ☒ Use an existing group



Intranet Visitors ▼

Members of this Site
Members can **contribute** content to the Web site. Create a group of site members or re-use an existing SharePoint group.

☒ Create a new group ☐ Use an existing group

News Editors

MOD Administrator;

Owners of this Site
Owners have **full control** over the Web site. Create a group of owners or re-use an existing SharePoint group.

☐ Create a new group ☒ Use an existing group

Intranet Owners ▼

OK

3. Go to Omnia Admin > Features.
4. Ensure the tenant scoped feature “Omnia Intranet News Core” is activated.
5. Activate the site collection scoped feature “Omnia Intranet News Infrastructure”.
6. Activate the following site scoped features:
 - Omnia Intranet News Center
 - Omnia Intranet Social
7. Go to the start page of the News Center.
8. Go to “Site Settings” > “Page layouts and site templates”.
9. Limit the available page layouts to “News article” and click ok.
10. Go back to “Page layouts and site templates” and click ok in order to get the correct default layout.
11. Go to Omnia Admin > Layouts.
12. Select the News Center site using the Site Picker.
13. Uncheck “Inherit Parent Settings”.
14. Remove the following layouts:
 - Omnia Intranet Start
 - Page with left navigation
 - Page no left navigation
15. Make the layout “News article” default.
16. Go to Features and activate the site feature “Omnia Image Picker Settings”.

17. Click on Image Picker in the left-hand navigation.
18. Select the local Images library.
19. Select the renditions “Square” and “Landscape (New)”. (Note! These renditions are used in the New UX experience in the News Viewer.)
20. Go to the start page of the news center using its quick page url <https://customer.sharepoint.com/sites/intra/#/news/Pages/NewsStartPage.aspx>.
21. Go into edit mode using the Omnia Edit Switch.
22. Add the fields Article Date and Enterprise Keywords as filters and change the paging type to Scroll.

Filters

Available Fields

- Contact
- Hide physical URLs from search
- Hide from Internet Search Engines
- Review Date
- Publishing Start Date
- Publishing End Date

Selected Fields

- Article Date
- Enterprise Keywords

☒ Show Search Box

☒ Show My Drafts Filter

Page Size

Paging Type ▼

23. Publish the page and create a couple of news articles to validate that all settings are applied as expected.

Setup Top Stories

1. Go to the start page of the News Center.
2. Go to Site Settings > Site permissions.
3. Create a new group for News Top Story Editors.

People and Groups › Create Group ⓘ

Name and About Me Description

Type a name and description for the group.

Name:

News Top Story Editors

About Me:

[Click for help about adding HTML formatting.](#)

Owner

The owner can change anything about the group such as adding and removing members or deleting the group. Only one user or group can be the owner.

Group owner:

[Intranet Owners](#) x

4. Go to Site Contents > Page Library Settings.
5. Create new column for Top Stories. (Note! Yes/No columns cannot be hidden in edit forms in SharePoint. If you do not want users to be able to edit it directly in SharePoint, you can create a Managed Metadata column instead.)

Name and Type

Type a name for this column, and select the type of information you want to store in the column.

Column name:

The type of information in this column is:

- ☐ Single line of text
- ☐ Multiple lines of text
- ☐ Choice (menu to choose from)
- ☐ Number (1, 1.0, 100)
- ☐ Currency (\$, ¥, €)
- ☐ Date and Time
- ☐ Lookup (information already on this site)
- ☒ Yes/No (check box)
- ☐ Person or Group
- ☐ Hyperlink or Picture
- ☐ Calculated (calculation based on other columns)
- ☐ Task Outcome
- ☐ External Data
- ☐ Managed Metadata

Additional Column Settings


Specify detailed options for the type of information you selected.

Description:

Default value:

- ☒ Add to all content types
- ☒ Add to default view

6. Go to Omnia Admin > Content Management > Page Properties.
7. Select the News Center site using the Site Picker.
8. Add the Top Story property to edit mode and give the group News Top Story Editors the permission to change the value. (Note! This feature does not support indirect membership of the group via AD Security Groups.)

Page Properties: **News Center** 

☐ Inherit Parent Settings

Property	Edit mode	Group permission	View mode
Contact	<input checked="" type="checkbox"/>	<input type="text"/>	<input checked="" type="checkbox"/>
Article Date	<input checked="" type="checkbox"/>	<input type="text"/>	<input checked="" type="checkbox"/>
Top Story	<input checked="" type="checkbox"/>	News Top Story Editors x	<input type="checkbox"/>
Enterprise Keywords	<input checked="" type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>

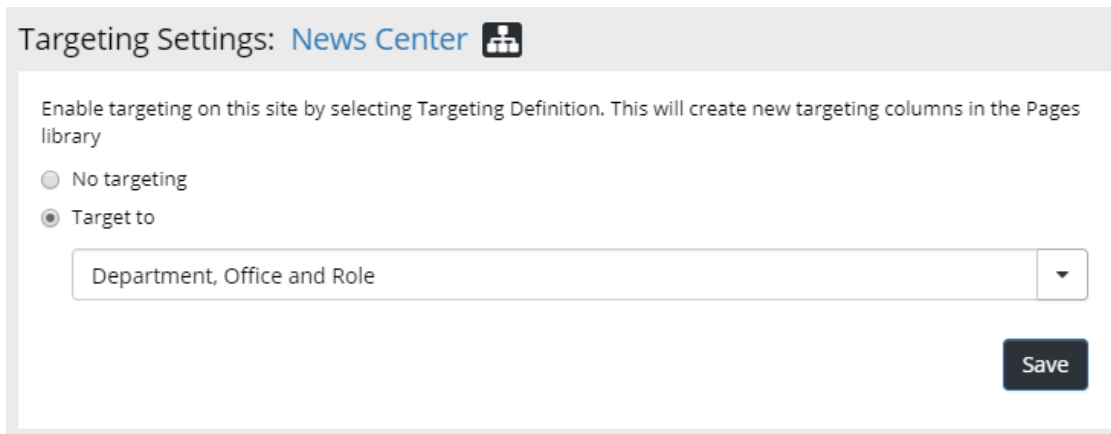
Setup Scheduled Publishing


1. Go to the start page in the main publishing site.
2. Go to Omnia Admin > Content Management > Scheduled Publishing.
3. Select the News Center site using the Site Picker.
4. Check the box “Enabled scheduled publishing” and save.

Setup Targeting

(Note! A prerequisite for targeting is that you have Targeting Definitions setup in the solution.)


1. Go to the start page in the main publishing site.
2. Go to Omnia Admin > Content Management > Targeting Settings.
3. Select the News Center site using the Site Picker.
4. Select which Target Definition to use. (Note! A site can only use one Target Definition.)



Targeting Settings: **News Center** 

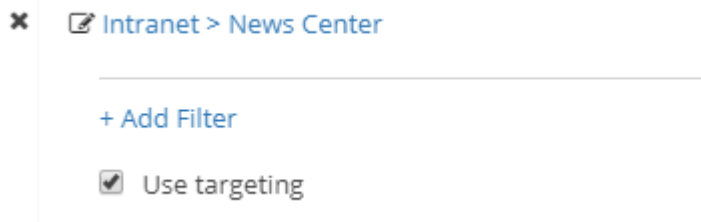
Enable targeting on this site by selecting Targeting Definition. This will create new targeting columns in the Pages library



☐ No targeting
☒ Target to

Department, Office and Role 

Save

5. Go to the setting of all News Viewers, you have set up in the solution, and check the box “Use targeting”.



  **Intranet > News Center**

[+ Add Filter](#)

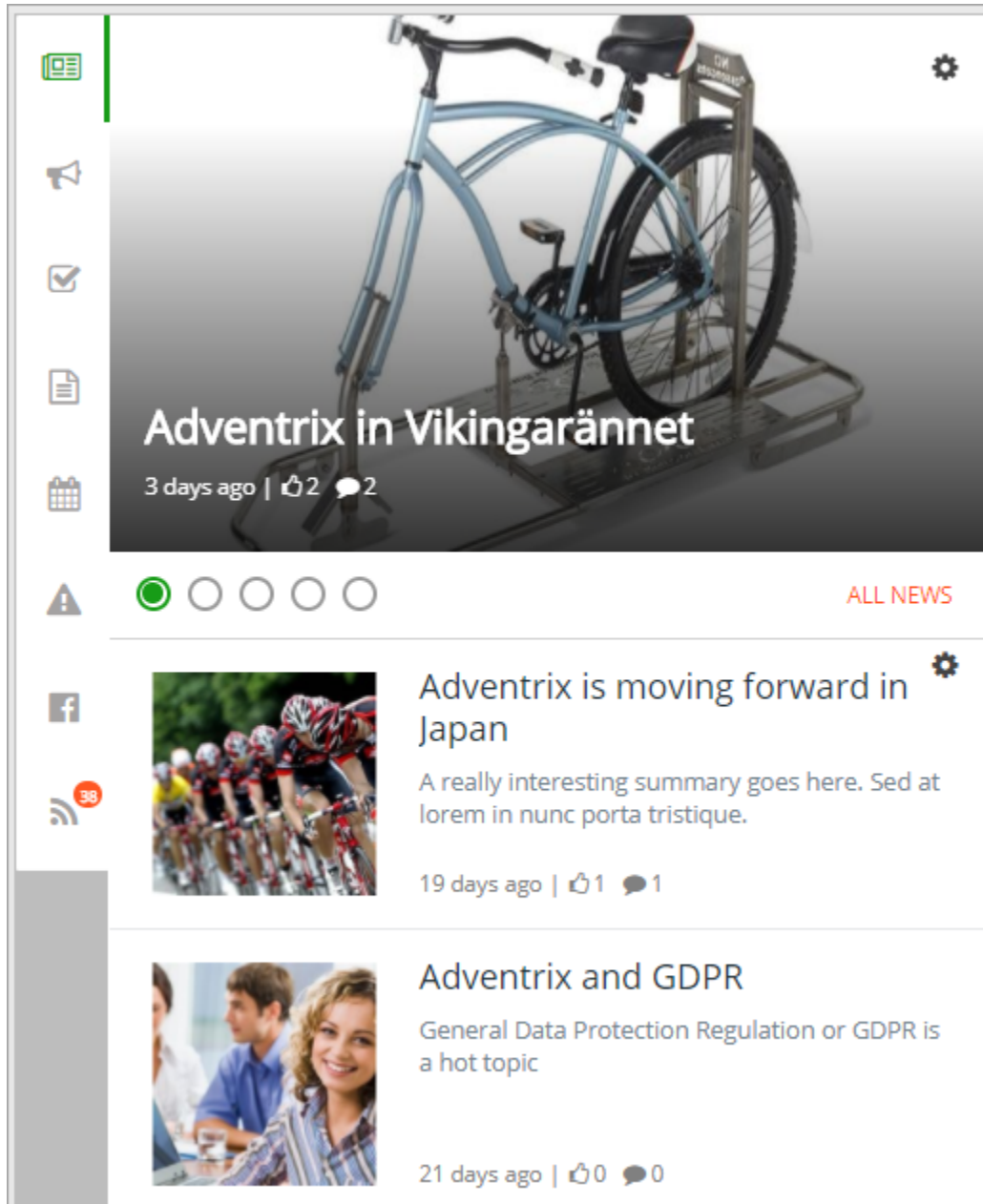
☒ Use targeting

Setup Important Announcements

1. Go to Omnia Admin > Features.
2. Activate the tenant scoped feature “Omnia Intranet Important Announcements”.

News Viewer

The news viewer control displays news articles from one or more News Centers, based on a configured filter.



News Viewer Settings

The news viewer settings are divided into three tabs.

The Query Settings tab

These settings defines which news articles to get from a specific news center.

News Viewer Settings

QUERY SETTINGS

DISPLAY SETTINGS

CUSTOM COLORS

+Add News Center

X

Intranet > News Center

Translated news

Show preferred language

Period

No Limit

Order By

Article Date

Descending

Item Limit

8

Priority

2

SAVE

CANCEL

Adding a News Center from the current site

When you click “Add News Center”, the following is shown:

News Viewer Settings

×

QUERY SETTINGS DISPLAY SETTINGS CUSTOM COLORS

Site Url

/

RESOLVE

☒ Current Site

News Center

News Center

ADD

×

☒ Intranet > News Center

▼

Translated news

Show preferred language

▼

Period

No Limit

▼

Order By

Article Date

▼

Descending

▼

Item Limit

8

Priority

2

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The **News Center** list displays all publishing sub sites in the site collection that have the “Omnia News Center” app

feature activated. You can add a News Center from another site, see below.

Select News Center(s) and set the settings this way:

1. Select a News Center from the list. If you want news from more than one News Center displayed in this viewer, select the others the same way.
2. If not all news from the News Center should be displayed, you can set filters. To do that, open the list for the News Center, and click “Add filter”. Filters are set indepently for each News Center.

News Viewer Settings [X]

QUERY SETTINGS DISPLAY SETTINGS CUSTOM COLORS

Site Url
/ RESOLVE

☒ Current Site

News Center
News Center ADD

X ☒ Intranet > News Center ^

+Add Filter

☒ Use targeting

Available filters for that News Center are then shown. (What is available can differ depending on how the specific News Center is set up).

3. Select filter to add.
4. To add additional filters, click “Add Filter” here.

News Viewer Settings [X]

QUERY SETTINGS | DISPLAY SETTINGS | CUSTOM COLORS

Site Url
/ [RESOLVE]

☒ Current Site

News Center
News Center [ADD]

[X] ☒ Intranet > News Center [^]

[X] Hide physical URLs from search = ☒

+Add Filter

☒ Use targeting

Filters will limit the news articles shown to the end user based on certain criterias. The filters support Yes/No and Managed Metadata columns. Omnia will list all supported columns from the pages library where the news articles are located. It is possible to filter based on a fixed value or a user profile property.

Some fields can be set to “Fixed value”. This is displayed as a check box. If checked, only news articles that is set to Yes will be shown. If unchecked, only news articles that is set to No will be shown. An example of this is the Top Story filter.

Some fields can be set to “Fixed Managed Metadata value”. Only one value from the term set can then be selected. If the checkbox “Include Child Terms” is checked, any child terms to the value selected will also match the filter (for example: United Kingdom is selected, this will match news articles tagged with London, Manchester and Birmingham)

A User “Profile Property” filter makes it possible to target news to a specific group of people based on their profile. When User Profile Property is selected, the value listbox will be populated with all available user profile properties in SharePoint. The News Viewer will do a string comparison between the values in the profile and the values set on the news articles. If “Include Child Terms” is checked, it will also include child terms to the terms the news article is tagged with. If “Include Empty” is selected, it will also include news articles that has not been tagged with this meta data property at all.

5. If targeting is activated, you can now select to use it or not. If you do not select “Use targeting” all targeting settings made by the authors are ignored.

Note! Regardless of the filters you set here, a user can always read all news articles in the News Center.

Adding a News Center from another Site

1. Click “Add News Center”.
2. Deselect “Current site”.
3. Activate the address field and enter the address to a site in another Site Collection.
4. Click “Resolve”.

News Centers in that site are now displayed in the News Center list. You select News Center and handle filters and targeting as described above.

Common fields

For the following fields the settings apply for all News Centers selected here:

- **Translated:** For translated news (if any) you can select “Show all languages”, “Show default language” or “Show preferred language”. Default language and preferred language are according to the settings the user has made in his or her profile.
- **Period:** A list of predefined values that will decide for how long news articles will be shown in the viewer. It is based on the article date. Select “No Limit” if the query should ignore date.
- **Order By:** It is possible to select whether to sort the list by title or article date. Default is article date descending.
- **Item Limit:** The number of news articles to show in the result can be limited to a maximum number of items.
- **Priority:** It is common that more than one News Viewer control is added to a page. Depending on how the different News Viewer controls are configured, a news article may end up in the result in more than one control. The priority setting makes sure that this cannot happen. The priority decides which control that will show the news article in such a case. A lower number (for example 1) takes priority over a higher number (for example 2).

The Display Settings tab

On this tab the following settings are available:

News Viewer Settings

QUERY SETTINGS DISPLAY SETTINGS CUSTOM COLORS

View Template
News Listing with Image (New UX)

☐ Show Title

☒ Display News Center link

News Center Label
News Center

☒ Open Page As Dialog

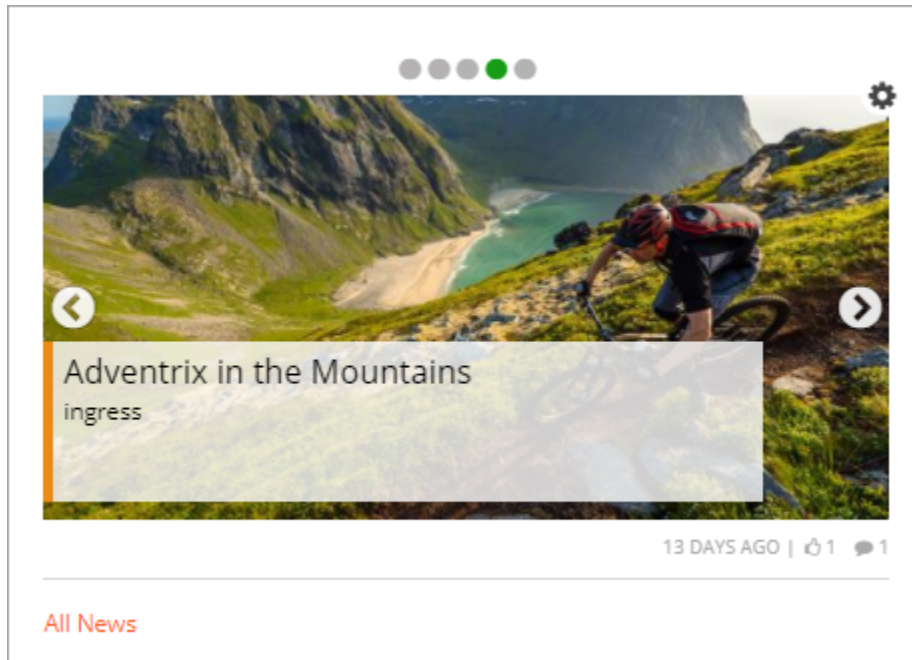
☒ Display no result message

SAVE CANCEL

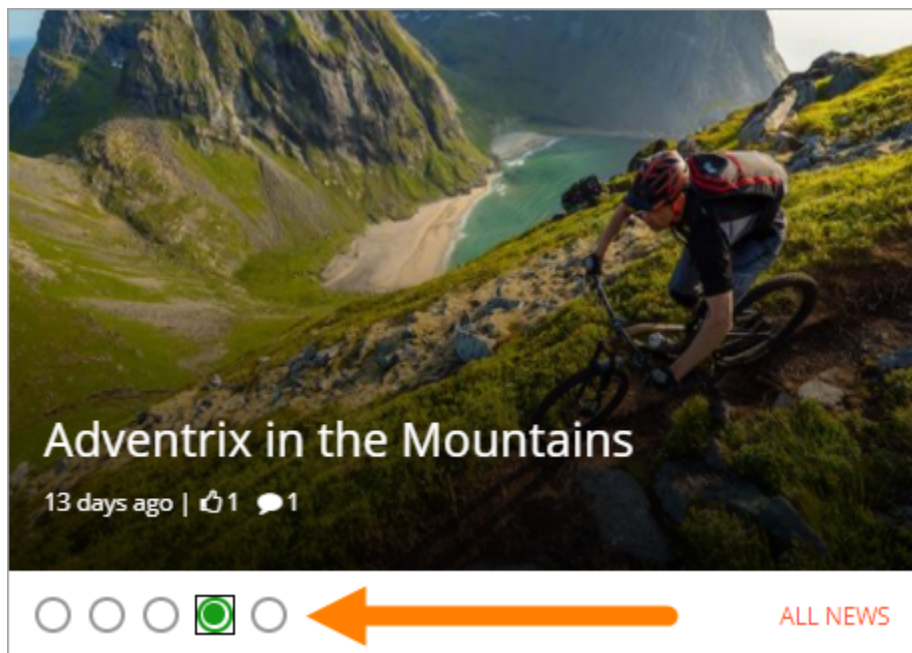
Many more options can be available depending on View Template selected, see below.

- **View Template:** The view template defines how the result should be rendered on the page. There are six options:

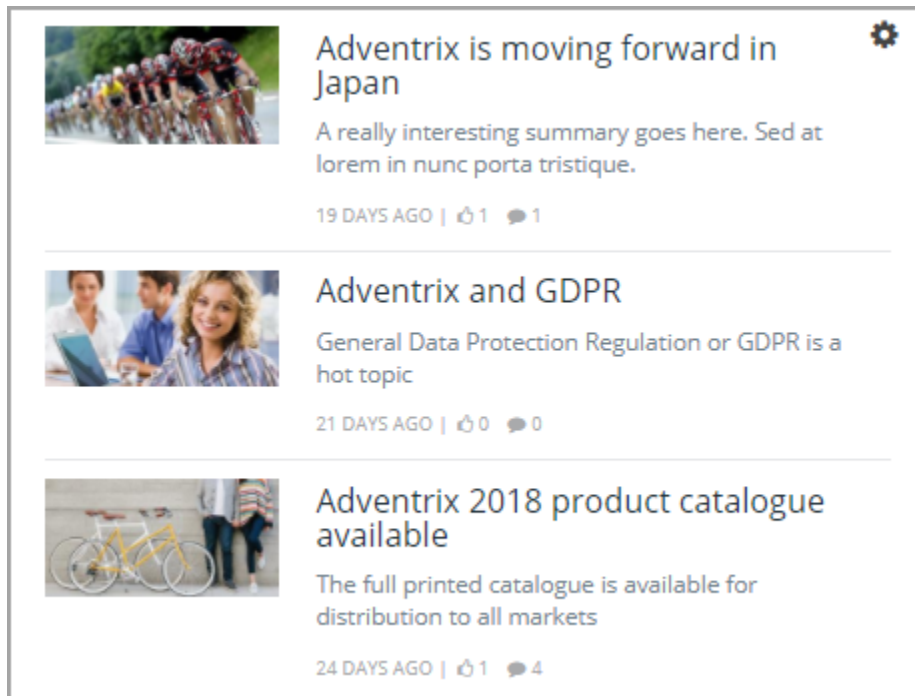
“News Roller” view displays all articles matching the query in the same area 5 seconds at a time. The user can manually change which article that is displayed by holding the mouse over the container and click on the arrows. The image is using Image Rendition with ID 1001.



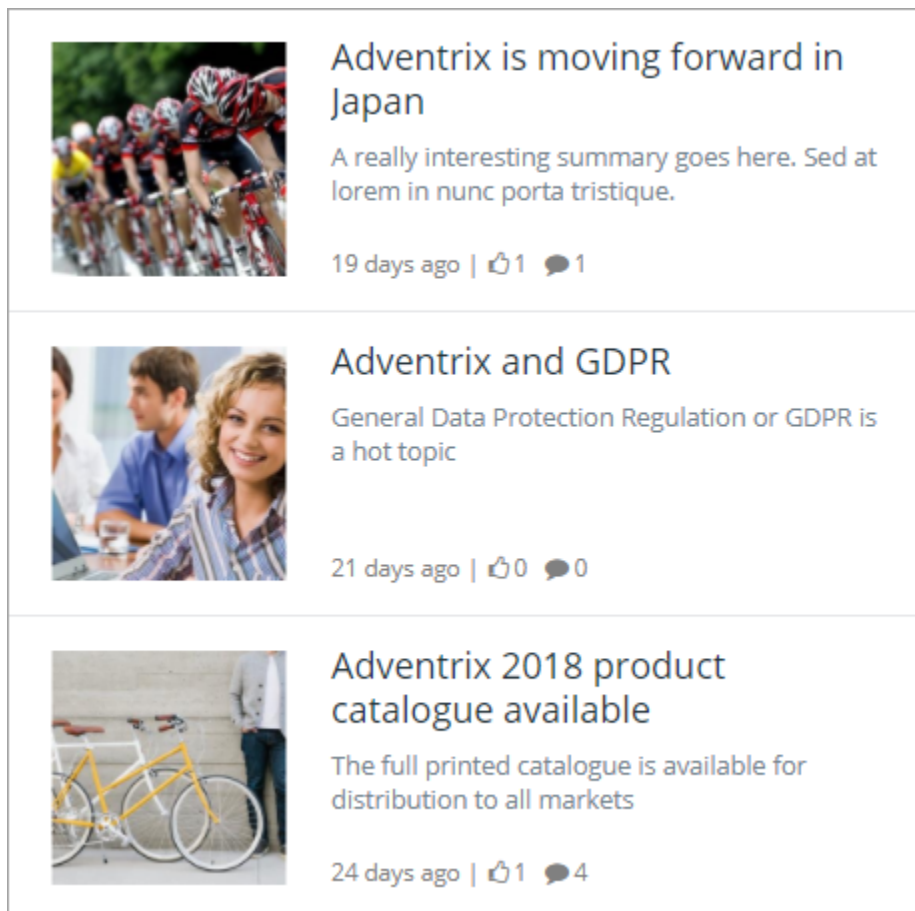
The “News Roller New UX” view displays all articles matching the query in the same area 5 seconds at a time. The user can manually change which article to displayed by clicking the buttons. The image is using Image Rendition with ID 1001.



“News Listing with Image” displays the news in a list, with a landscape image to the left.



“News Listing with Image New UX” displays the news in a list, with a square image to the left.



“Top Story” displays a big image with title on a transparent area. If one news article is displayed as Top Story, it will

use the image with Landscape image rendition.

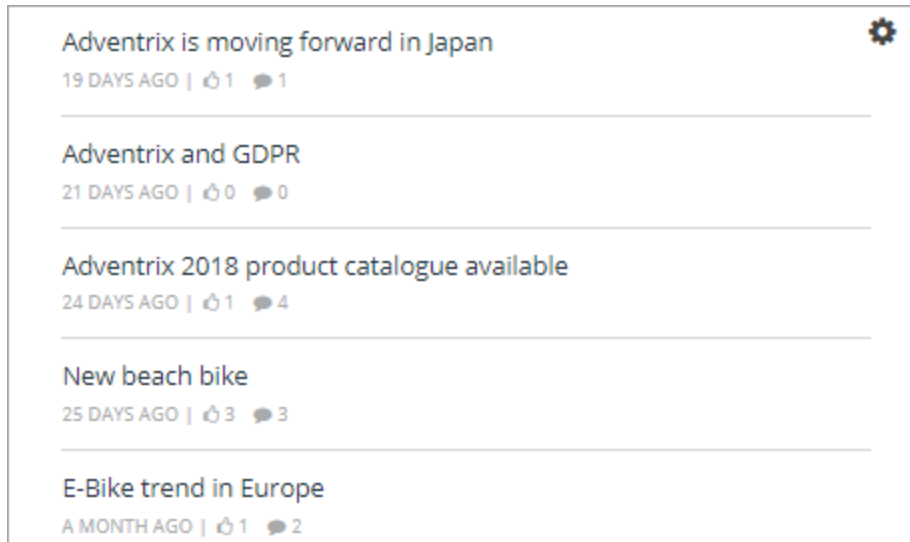


If two news articles are displayed, it will use the image with Square image rendition. If the news article does not have an image, more metadata about the news article will be shown and the background and text colors will use the [default colors](/Docs/[language]/Omnia%20Admin/default-colors/index.html).



If three news articles are displayed, it will use the image with Portrait image rendition.


A "Simple List" view displays the news articles without image in a simple list.



- **Opacity:** Sets the opacity for the image. 1 is no opacity. Available for “New Roller (New UX)”.
- **Transition:** Available for “News Roller” and “News Roller (New UX)” only. Can be “Slide” or “Fade”.
- **Interval tim:** Available for “News Roller” and “News Roller (New UX)” only. Set number of milliseconds between transitions here. Default=6000.
- **Number of laps:** Available for “News Roller” and “News Roller (New UX)” only. Set the number of times the news roller should show all articles before it stops. Default=0, which means no stop.
- **Show Title:** If you would like to show a title at the top of the News list, select this option and then add the Title in the field shown.
- **Display News Center link:** Check if the link “Go to News Center” should be available at the end of the News Viewer.
- **News Center Label:** Here you can change the label displayed for the News Center.
- **Open Page as Dialog:** If you would like the News article to be opened in a dialogue, instead of a page, select this option. See below for an example.
- **Display no result message:** Check if a no result message should be shown if there are no news articles available in the list, for the logged in user.

If a news article has not been read by the user (it is considered read when the user has browsed to the news article page), the title will be shown in bold.

Here’s an example of a News article displayed in a dialog:



Fair Trade Award to Adventrix

The way we are doing business pays off - not only in monetary terms. The proof of this came at the Fair Trade Gala in Berlin on Friday.

The EU Cities for Fair and Ethical Trade Award, an initiative of the European Commission's Directorate-General for Trade, celebrates EU cities who champion more sustainable trade, consumption and production, thus creating opportunities for producers elsewhere.

Purchasing decisions of consumers in EU cities, as global trade and consumption centres, are key to driving change, both for the environment and people's livelihoods. The Award recognizes and showcases EU cities' achievements across the social, economic and environmental pillars of international trade which help to deliver on SDG 12 and other goals. Through knowledge-sharing and networking opportunities, the Award provides a unique platform for EU cities to learn and scale up their sustainability initiatives.



After a successful first edition in 2018 that awarded the winning title to the Belgian city of Ghent, the second Award will take place in 2020. The Award welcomes applications from cities leading on sustainable, fair and ethical trade through:


- A compelling vision, strategy and objectives
- Relevant policies
- Impactful activities and initiatives

The Award recognizes cities in the following categories:

- An overall winner
- Special Mentions for outstanding achievements in several areas

You like this

 LIKE
  SHARE

 OPEN PAGE

You can open the page from here by clicking the link in the low right corner.

The Custom Colors tab

You should primarily set colors through Theme colors in Omnia Admin (System/Settings/Default colors). If you still would like custom colors for the control, you can set them using this tab.

News Viewer Settings

×

QUERY SETTINGS

DISPLAY SETTINGS

CUSTOM COLORS

Active color

▼

Accent color

▼

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News Viewer in Notification Panel

The News Viewer control is available in the Notification Panel (see the image at the top of the page). If the News Viewer is added to the panel, a notification count icon will be shown if there are news articles in the result that are new to the user (the user has not seen them in the news list before).

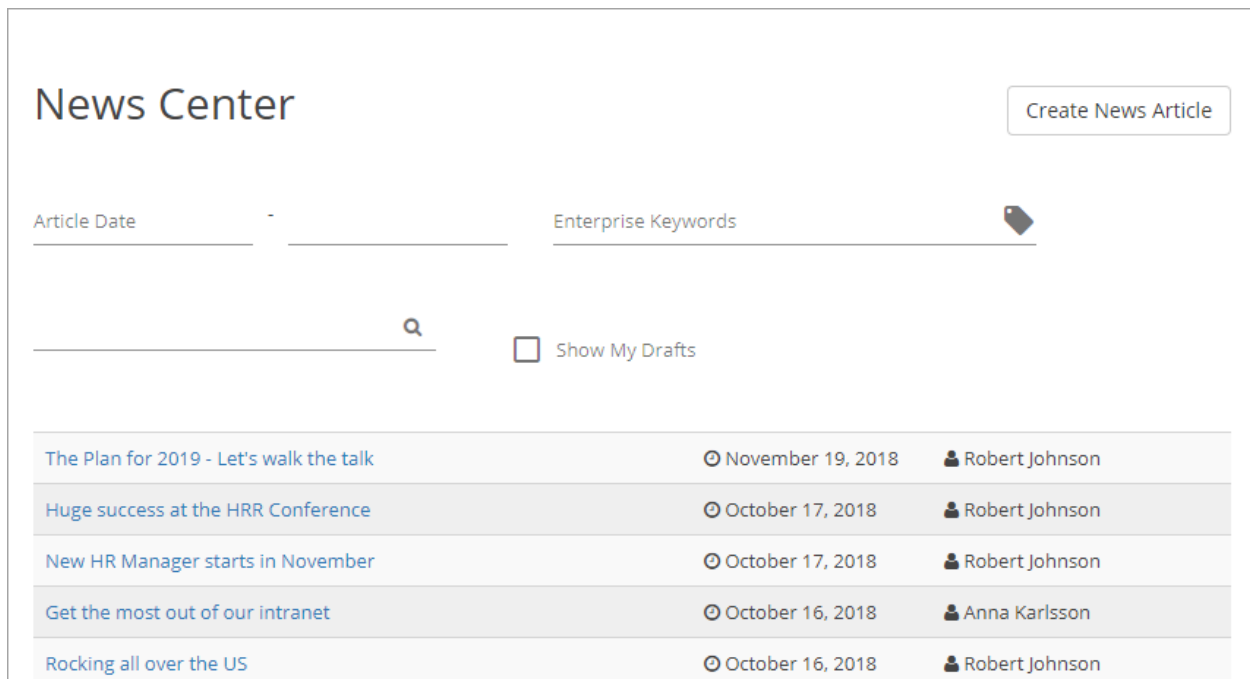
News Viewer Web Part/block

The News Viewer control can also be added to a legacy page as a web part or as a block to a Quick Page.

News Archive

The News Archive control makes it possible for the end user to find news articles published in a specific News Center site.

The News Archive control is deployed as part of the News Center page layout. Note: “Create News Article” is displayed for news editors only.



The screenshot shows the News Center interface. At the top left is the title "News Center". At the top right is a button labeled "Create News Article". Below the title, there are two search filters: "Article Date" and "Enterprise Keywords". Below these filters is a search bar with a magnifying glass icon and a checkbox labeled "Show My Drafts". Below the search bar is a table of news articles.

The Plan for 2019 - Let's walk the talk	🕒 November 19, 2018	👤 Robert Johnson
Huge success at the HRR Conference	🕒 October 17, 2018	👤 Robert Johnson
New HR Manager starts in November	🕒 October 17, 2018	👤 Robert Johnson
Get the most out of our intranet	🕒 October 16, 2018	👤 Anna Karlsson
Rocking all over the US	🕒 October 16, 2018	👤 Robert Johnson

The following settings are available for the control:

News Archive Settings

News Center

News Center

Filters

Available Fields

Contact

Hide physical URLs from search

Hide from Internet Search Engines

Review Date

Selected Fields

Article Date

Enterprise Keywords

☒ Show Search Box

☒ Show My Drafts Filter

Page Size

20

Paging Type

Classic

SAVE

CANCEL

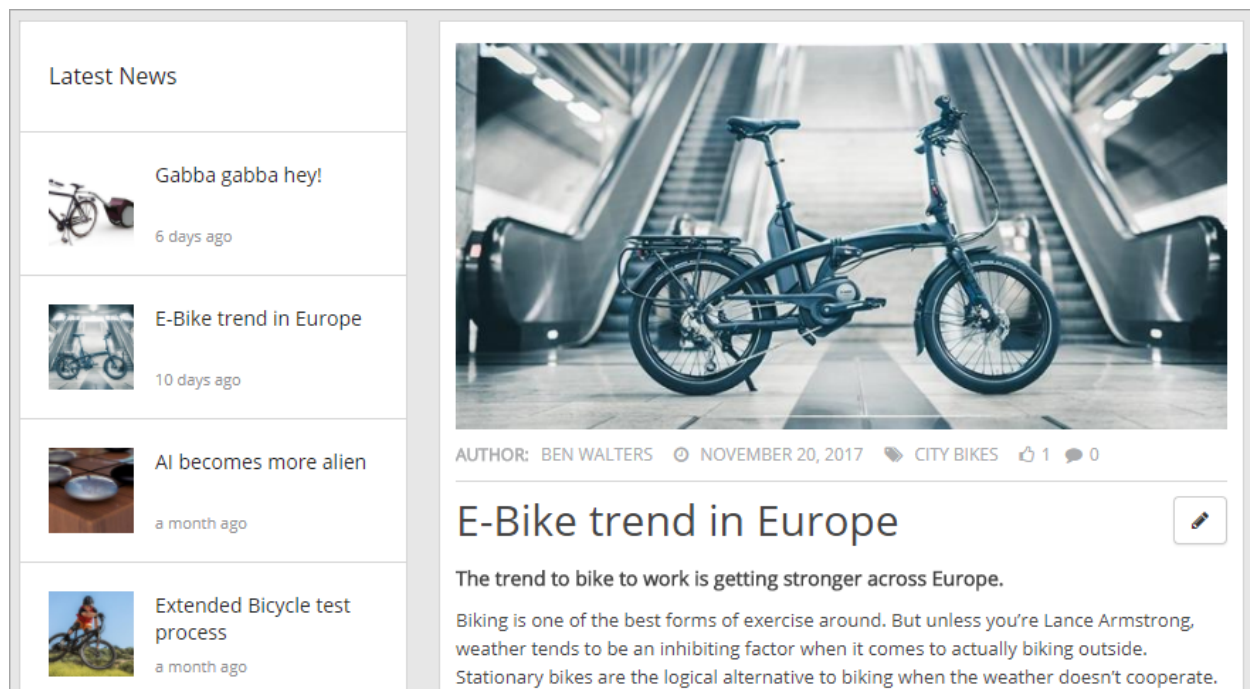
- **News Center:** The drop down displays all news centers deployed to the current site collection. Select the news

center that should be shown in the control.

- **Available fields/Selected Fields:** “Available Fields” and “Selected Fields” are used for filtering, to decide which columns to show in the list. The Available Fields list displays all supported list columns (Date and Time, Person or Group, Yes/No, Managed Metadata) in the Pages library of the selected News Center site. The Selected Fields will show up as filters to the end user. It is possible to drag and drop the columns to decide in which order the columns should be rendered to the end user.
- **Show Search Box:** Checked if the free text search box should be available.
- **Show My Drafts Filter:** Check if it should be possible for the end user to show draft news (only relevant for news authors).
- **Page Size:** Defines the number of news articles displayed per list page.
- **Paging Type:** Defines what type of paging that should be used: *Classic*: The result list will be divided into pages based on the Page Size. *Scroll*: By default, the page will load as many news articles that can fit the screen. When the user scrolls down, the number of news articles set in Page Size will load.

Latest News

The Latest News control displays the latest news published, when reading a news article.



The settings

The following settings are available for the control:

Latest News Settings

GENERAL

CUSTOM COLORS

Heading

Item Limit

5

View Template

News Listing with Images

Preview

Related News

News article

a day ago

Contact person

News article

a day ago

Contact person

News article

a day ago

Contact person

254

SAVE

CANCEL

The General tab

On the General tab you can set the following:

- **Heading:** You can edit the heading shown for the list here.
- **Item Limit:** Set the maximum numbers of news articles to display in the list.
- **View Template:** Select to show the list as a news listing with images or as a simple list. See the “Preview” for a rough example.

The Custom Colors tab

You should primarily set colors through Theme colors in Omnia Admin (System/Settings/Default colors). If you still would like custom colors for the control, you can set them using this tab.

Latest News Settings

GENERAL

CUSTOM COLORS

Title color

Background color

Preview

Related News

News article

a day ago

Contact person

News article

a day ago

Contact person

News article

a day ago

Contact person

256





SAVE

CANCEL

Related News

The Related News control display news articles that share any enterprise keyword, or any of the defined properties, with the current news article.

Here's an example:

<p>My new bike 5 days ago Anders Fagerlund</p>	 <p>CONTACT: ANDERS FAGERLUND ARTICLE DATE: NOVEMBER 15, 2017 SALES</p> <p>1 1 Show more...</p>
<p>Adventrix in the Mountains 13 days ago Thomas Modadmin</p>	<h2>Adventrix is moving forward in Japan</h2> <p>A really interesting summary goes here. Sed at lorem in nunc porta tristique.</p> <p>Lorem ipsum dolor sit amet, consectetur adipiscing elit. Maecenas porttitor congue massa. Fusce posuere, magna sed pulvinar ultricies, purus lectus malesuada libero, sit amet commodo magna eros quis urna.</p>
<p>IT operations in the cloud 17 days ago Jörgen Bjerkesjö</p>	<h2>Introduction</h2> <p>Nunc viverra imperdiet enim. Fusce est. Vivamus a tellus. Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas. Proin pharetra nonummy pede. Mauris et orci. Aenean nec lorem. In porttitor. Donec laoreet nonummy augue. Suspendisse dui purus, scelerisque at, vulputate vitae, pretium mattis, nunc. Mauris eget neque at sem venenatis eleifend. Ut nonummy.</p> <p>Fusce aliquet pede non pede. Suspendisse dapibus lorem pellentesque magna. Integer nulla. Donec blandit feugiat ligula. Donec hendrerit, felis et imperdiet euismod, purus ipsum pretium metus, in lacinia nulla nisl eget sapien. Donec ut est in lectus consequat consequat.</p> <p>Etiam eget dui. Aliquam erat volutpat. Proin nec augue. Quisque aliquam tempor magna. Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas.</p> <p>Nunc ac magna. Maecenas odio dolor, vulputate vel, auctor ac, accumsan id, felis. Pellentesque cursus sagittis felis.</p>
<p>Related News</p>	
 <p>Launch of new partner organization 2 months ago</p>	
 <p>Adventrix moving forward in Denmark 2 months ago</p>	
 <p>Strong 3rd quarter for Adventrix 2 months ago</p>	

The settings

The following settings are available for the control:

Related News Settings

GENERAL

CUSTOM COLORS

Label

Item Limit

5

View Template

News Listing with Images

Related Property

Enterprise Keywords

Preview

Related News

News article

a day ago

Contact person

News article

a day ago

Contact person

News article

a day ago

Contact person

258

SAVE

CANCEL

Chapter 1. Topics

The General tab

On this tab you can set the following:

- **Label:** You can edit the heading shown for the list here.
- **Item Limit:** The maximum numbers of news articles to display in the list.
- **View Template:** Select to show the list as a news listing with images or as a simple list. See the “Preview” for a rough example.
- **Related Property:** Select what should be defined as shared: “Enterprise Keywords” or any of the defined properties available in the list.

The Custom Colors tab

You should primarily set colors through Theme colors in Omnia Admin (System/Settings/Default colors). If you still would like custom colors for the controls heading, you can set them using this tab.

Related News Settings

GENERAL

CUSTOM COLORS

Title color

Background color

Preview

Related News

News article

a day ago

Contact person

News article

a day ago

Contact person

News article

a day ago

Contact person

260

SAVE

CANCEL

Scheduled Publishing

If Scheduling is activated for the News Site, a “Scheduled” tab is shown, to be used by news authors. Even if scheduling is activated it is up to the news author to use it or not for a specific news page.

Here’s an example:

The screenshot shows the 'Scheduled' tab in the Omnia Admin interface. At the top, there are buttons for 'Save', 'Undo Changes', 'Publish' (highlighted in blue), 'Open Page', and 'Delete Page'. Below these are tabs for 'General', 'Content', 'Links', 'Properties', 'Targeting', and 'Scheduled' (which is the active tab). The 'Scheduled' tab contains the following settings:

- Enable scheduled publishing:** A checkbox that is checked.
- Start publishing:** A text input field followed by a calendar icon.
- End publishing:** A text input field followed by a calendar icon.

When Scheduled is activated for a page, the “Publish” button is no longer available (it’s now grey as you can see in the image below). The news author just saves the page the normal way. Publishing takes place according to the date and time entered. Start date and time must be entered. End time is optional.

This screenshot is similar to the one above, but the 'Publish' button is now greyed out. The 'Scheduled' tab is still active, and the settings for 'Enable scheduled publishing', 'Start publishing', and 'End publishing' are visible. The 'Publish' button is no longer highlighted in blue.

Activating Scheduled Publishing for a Site

Use the Omnia Admin settings for the active site collection to activate or deactivate Scheduled Publishing. It’s found under “Content Management”:


The screenshot shows the 'Content Management' dashboard. The top navigation bar includes 'Permissions', 'Enable Quick Pages', 'Targeting Settings', 'Page Properties', 'Scheduled Publishing' (highlighted with an orange box), and 'Web Report Settings'. Below the navigation bar, there are two sections: 'All Pages in this Site Collection' and 'My Pages in this Site Collection'. Each section contains three cards with statistics.

All Pages in this Site Collection		
Total number	Not modified for a year	Past review date
410	206	77

My Pages in this Site Collection		
Total number	Not modified for a year	Past review date
130	32	41

To activate, just select the box and save.

The screenshot shows the 'Scheduled Publishing' settings for 'Intranet'. It includes a checkbox labeled 'Enabled scheduled publishing' which is currently unchecked. A 'Save' button is located at the bottom right of the form.

Scheduled Publishing: [Intranet](#) 

☐ Enabled scheduled publishing

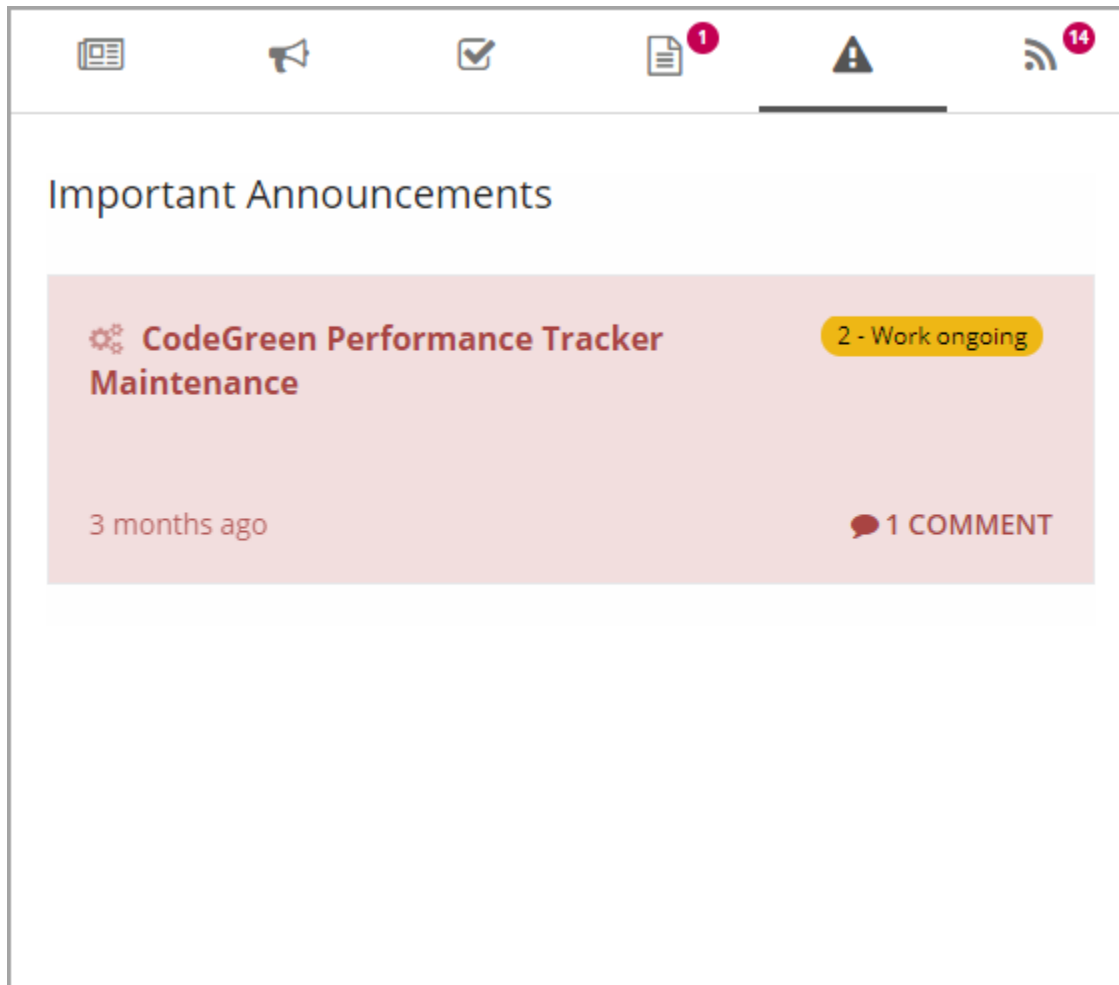
[Save](#)

This enables Scheduled Publishing to be used by authors. It is probably most interesting for news but can be activated for any site.

Important Announcements

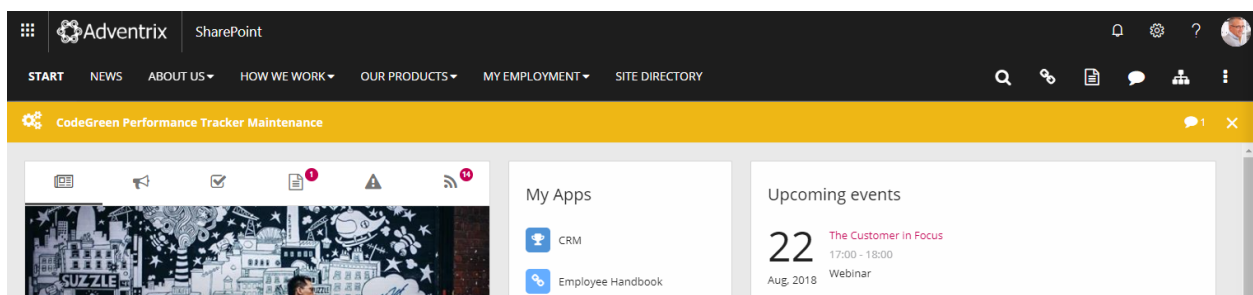
Important Announcements can have Normal priority or High priority.

All Important Announcements messages are shown in the the Notification panel, for example:



Important Announcements with Normal priority are shown in the Notification panel only. Important Announcements with High priority are displayed below the cross site mega menu on all pages in the intranet, both publishing pages and team sites, as well as in the Notification panel.

When the message has been read, the user can choose to close the message by clicking the x, if it is allowed. In the settings for each important announcement, the editor can set if the user will be able to close the message manually.



If the user does not actively close the message, the message is shown the full time the administrator has set.

Commenting an Important Announcement


If commenting is allowed for the Important Announcement (set individually for each Important Announcement, see below) any user can comment the message. It works the same way as commenting a publishing page, for example

news. The number of comments for each message are shown in the list, for example:

To read or add comments, click “Comment(s)” and something like the following is shown:

Delays at loading points 3 and 4


2 comments



Anna Karlsson
Apr 22, 2018, 10:40

Can we use point 2 for shipment of MTB:s to Asia? Those deliveries are high priority since sales campaign starts on May 5.

Like Reply




Robert Johnson
Apr 22, 2018, 10:42

We will set up bay 2 and 7 right away so outgoing deliveries can be carried out as planned from 11 am today.

Like Reply

COMMENT HAS BEEN DELETED BY ROBERT JOHNSON



ADD COMMENT

Creating and editing Important Announcements

Global and tenant administrators can add or edit Important Announcements, in Omnia Admin. If additional users should be able to create important announcements, add them using the “Permissions” option. Users or permission groups can be added.

Note! The tenant feature “Omnia Important Announcements” needs to be activated in order for the Important Announcements administration page to appear. The administration page displays the history of all important announcements published in the tenant.

Important Announcements						
+ Add Important Announcement Types and Status Permissions						
Title	Priority	Order	Start Date	End Date		
CRM System unavailable	High	1	aug. 13, 2018 6:00:00 fm	aug. 14, 2018 11:00:00 em	2	
Delays at loading points 3 and 4	High	1	aug. 13, 2018 8:00:00 fm	aug. 15, 2018 12:00:00 em	2	
Network failure in the Copenhagen office	High	1	feb. 12, 2018 12:00:00 fm	feb. 13, 2018 12:00:00 fm		
Office closed today due to snow storm	High	1	juni 6, 2018 12:00:00 fm	juni 7, 2018 12:00:00 fm	1	
Recruitment Management System unavailable	High	1	juni 18, 2018 12:00:00 fm	juni 19, 2018 12:00:00 fm		
CodeGreen Performance Tracker Maintenance	High				1	
CRM System down for maintenance	High		juni 25, 2018 12:00:00 fm	juni 27, 2018 12:00:00 fm		
Delays at loading point 7 today	Normal	1	jan. 18, 2018 12:00:00 fm	jan. 20, 2018 12:00:00 fm		
Heavy rain causes delays at loading point 3	Normal	2	mars 19, 2018 12:00:00 fm	mars 24, 2018 12:00:00 fm		

An important announcement can be tagged with a Type and a Status. When an important announcement is updated (for example to change status), it is possible to republish the announcement for users that have closed the announcement.

If comments are allowed for an announcement, which is default, you can read the comments by clicking the icon:









Important Announcements					
+ Add Important Announcement ⚙️ Types and Status 🔍 Permissions					
Title	Priority	Order	Start Date	End Date	
CRM System unavailable	High	1	aug. 13, 2018 6:00:00 fm	aug. 14, 2018 11:00:00 em	💬2 🗑️
Delays at loading points 3 and 4	High	1	aug. 13, 2018 8:00:00 fm	aug. 15, 2018 12:00:00 em	💬2 🗑️
Network failure in the Copenhagen office	High	1	feb. 12, 2018 12:00:00 fm	feb. 13, 2018 12:00:00 fm	🗑️
Office closed today due to snow storm	High	1	juni 6, 2018 12:00:00 fm	juni 7, 2018 12:00:00 fm	💬1 🗑️
Recruitment Management System unavailable	High	1	juni 18, 2018 12:00:00 fm	juni 19, 2018 12:00:00 fm	🗑️
CodeGreen Performance Tracker Maintenance	High				💬1 🗑️
CRM System down for maintenance	High		juni 25, 2018 12:00:00 fm	juni 27, 2018 12:00:00 fm	🗑️
Delays at loading point 7 today	Normal	1	jan. 18, 2018 12:00:00 fm	jan. 20, 2018 12:00:00 fm	🗑️
Heavy rain causes delays at loading point 3	Normal	2	mars 19, 2018 12:00:00 fm	mars 24, 2018 12:00:00 fm	🗑️

To comment the announcement, or another comment, yourself, you do that the normal way, as any other user would.









Types and Status

You can create Types and Status to use as an indicator for Important Announcements. A list of Types and status can look like this:

Types

Title	Icon	
Delivery		
IT		
Office related		
Production		

Status

Title	Color	
1 - New issue		
2 - Work ongoing		
3 - Problem solved		
Planned		

Is a Type or a Status no longer needed? Just click the dust bin.

For Types you can add a title and select an icon:

Add Type

Title

Icon

▼

Save

Close

For Status you can can do the same, ad a title and select an icon:

Add Status

Title

Color

▼

Save

Close

New Important Announcement

To add a new Important Announcement, click the link “Add Important Announcement” and the following is shown:

Add Important Announcement

Title

Summary

Image

Browse

Detail

B

I

U

“

Paragraph

Priority ⓘ

Order

Start Date

HH

:

MM

AM

End Date

HH

:

MM

AM

Type

Status

☒ Allow comments

Targeting Settings

☒ No targeting

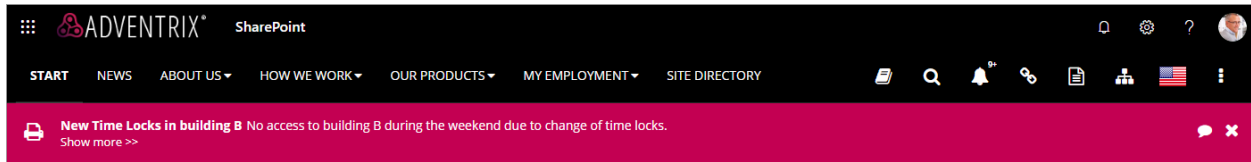
☐ Target to

Save

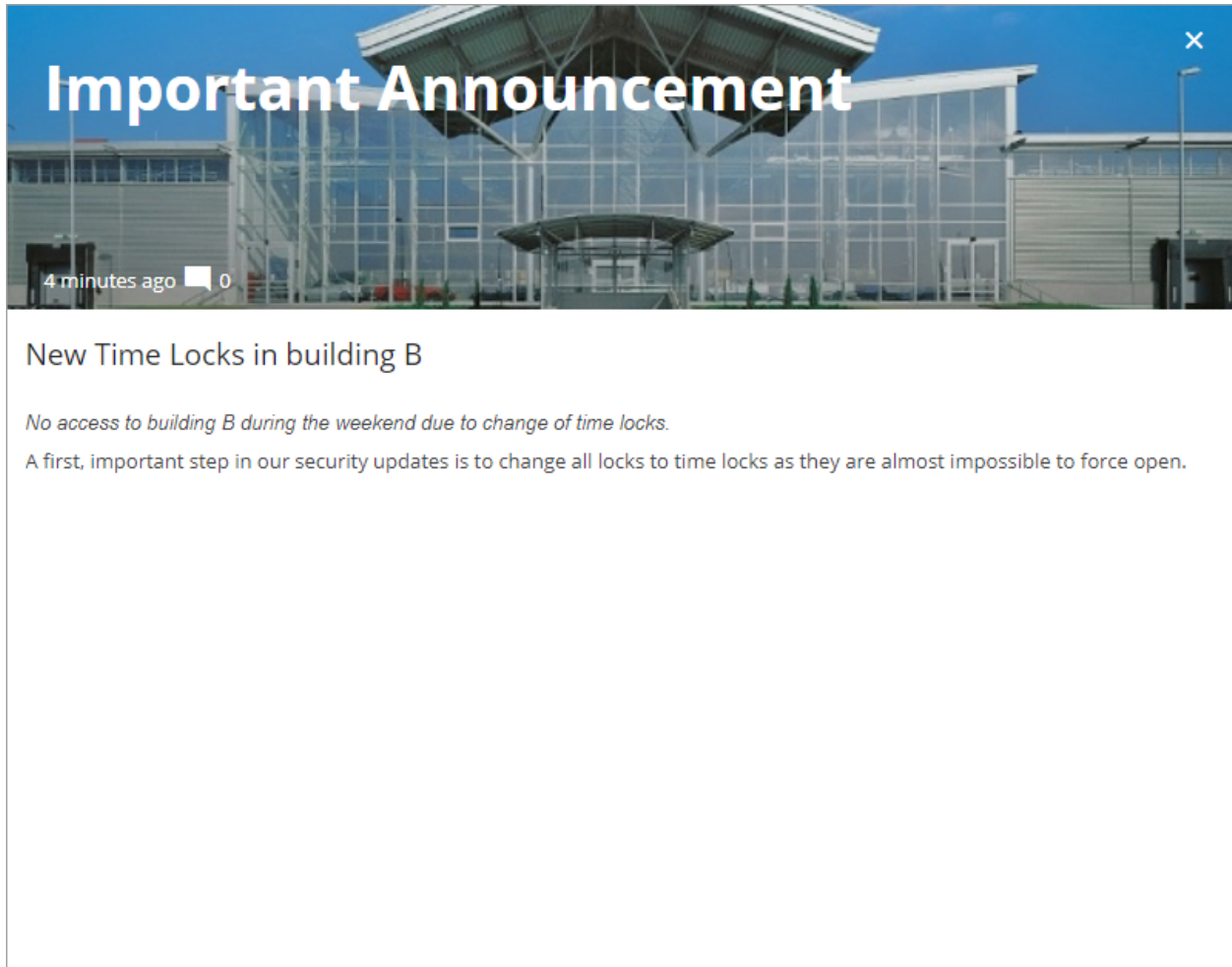
Close

1. Add a Title and a Summary.
2. Add an image if you wish. This image is used in the details dialog, see below for an example.
3. Add a description if needed (Detail). Shown for High priority announcements and used in the header only. Here you can use Rich Text for formatting. If you add content here a Show more link is shown in the message, that users can click on to read the details. See images below for an example.
4. Set the Priority. Important Announcements with High priority will be displayed below the cross site mega menu on all pages, and in the Notification panel. Important Announcements with Normal priority will be displayed in the notification panel only.
5. Set the order for this Important Announcement when there are several displayed.
6. Set the start and end date of the Important Announcement. You can set exact times within the dates if needed. Start and end dates are optional, but we recommend that you always at least set an end date.
7. Choose Type and Status if needed.
8. Decide to allow comments or not. The default is to allow comments. If allowed, users can add comments, and even comment other comments (and so can you of course) the same way as for example for news.
9. Decide to let users close an announcement when it's read, or not (only applicable for High priority announcements). Default is on. A good reason to have this option active is that when an announcement is closed, the user can't see any new comments. You can for example use comments to inform about developments and when the problem is solved.
10. You can also target the Important Announcement. See below (Heading "Targeting").

When details are added to an Important Announcement a "Show more" link is added. Here's an example:



When a user clicks the link the detailed text is shown, for example:

A screenshot of an 'Important Announcement' modal. The header features a background image of a modern building with a large glass facade and a curved roof. The title 'Important Announcement' is in large, bold, white text. Below the title, on the left, it says '4 minutes ago' next to a speech bubble icon with the number '0'. On the right, there is a close button (an 'x' icon). The main content area has a white background and contains the following text:

New Time Locks in building B

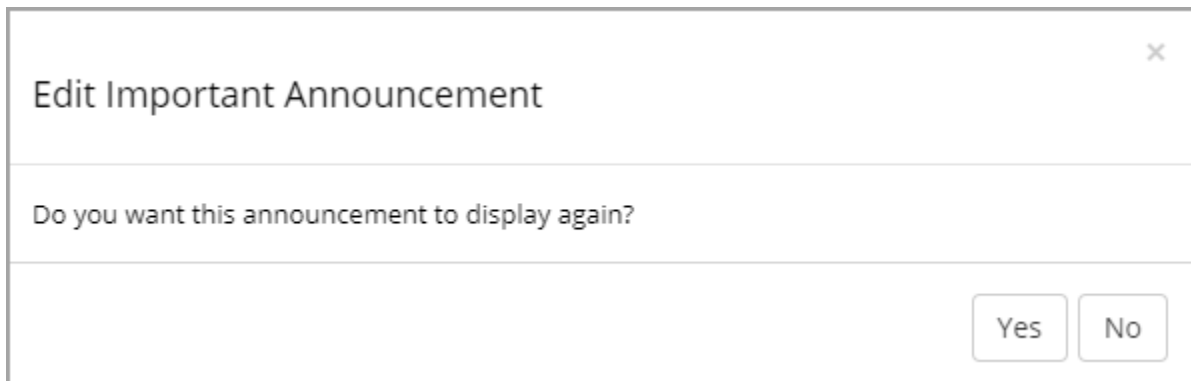
No access to building B during the weekend due to change of time locks.

A first, important step in our security updates is to change all locks to time locks as they are almost impossible to force open.

Edit and republish

When you edit an Important Announcement of High priority you can choose to republish the announcement so even users that has closed the announcement will be able to see the update.

When you click “Save”, the following is shown:

A screenshot of a dialog box titled 'Edit Important Announcement'. The dialog has a light gray header with the title and a close button (an 'x' icon) in the top right corner. The main body of the dialog is white and contains the question 'Do you want this announcement to display again?'. At the bottom right, there are two buttons: 'Yes' and 'No'.

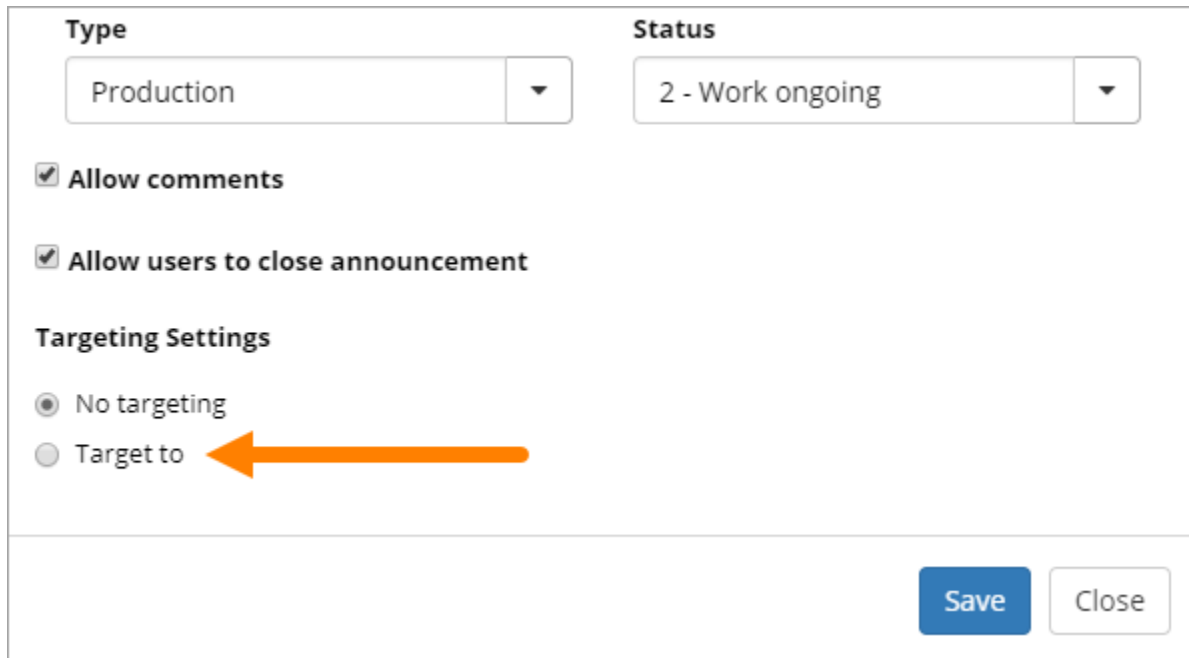
To republish the announcement for all users, click “Yes”.

Targeting

An Important Announcement can be targeted to any receivers that has been defined in Target Definitions, see: Targeting Definitions

To target an Important Announcement, do the following:

1. Select “Target to”.



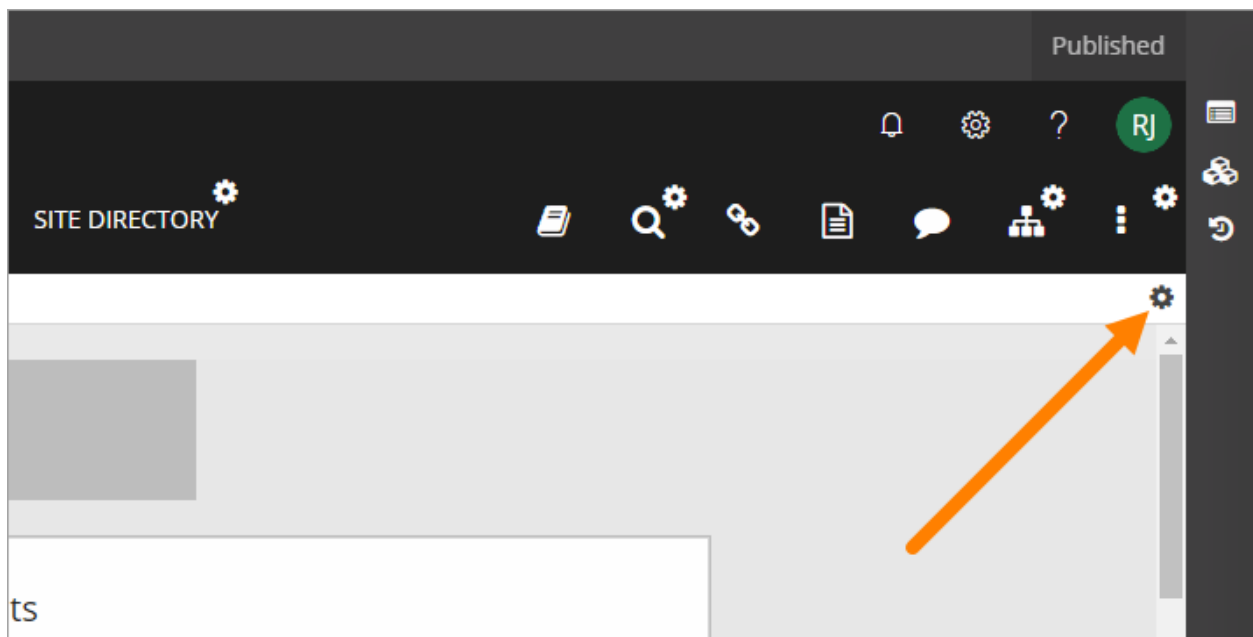
The screenshot shows a configuration form for an announcement. At the top, there are two dropdown menus: 'Type' with 'Production' selected and 'Status' with '2 - Work ongoing' selected. Below these are two checked checkboxes: 'Allow comments' and 'Allow users to close announcement'. Under the heading 'Targeting Settings', there are two radio button options: 'No targeting' (which is selected) and 'Target to'. A large orange arrow points to the 'Target to' radio button. At the bottom right of the form are two buttons: 'Save' (in blue) and 'Close' (in white).

2. Open the list and select target.

Type	Status
Production	2 - Work ongoing
<input checked="" type="checkbox"/> Allow comments	
<input checked="" type="checkbox"/> Allow users to close announcement	
Targeting Settings	
<input type="radio"/> No targeting	
<input checked="" type="radio"/> Target to	
<div>Organization, Location and Role</div>	
<div>SaveClose</div>	

High Priority Announcements settings

There are some settings available for High Priority Announcements. It can be reached by the cog wheel here:



You can set the following here:

High Priority Announcements Settings

Poll interval (minutes)

5

Background Color

Text Color

SAVE

CANCEL

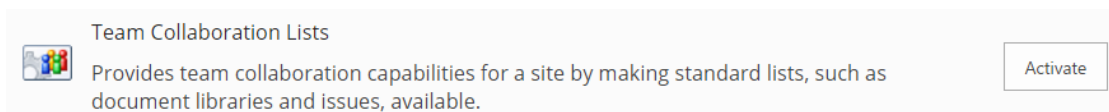
- **Poll interval (minutes):** Set a time interval in minutes for how often the page should poll for new announcements. Default=5 minutes.
- **Background color** and **Text color:** You should primarily set colors through Theme colors in Omnia Admin (System/Settings/Default colors). If you still would like custom colors for the control, you can set them using these two options.

1.5.4 Publishing Features

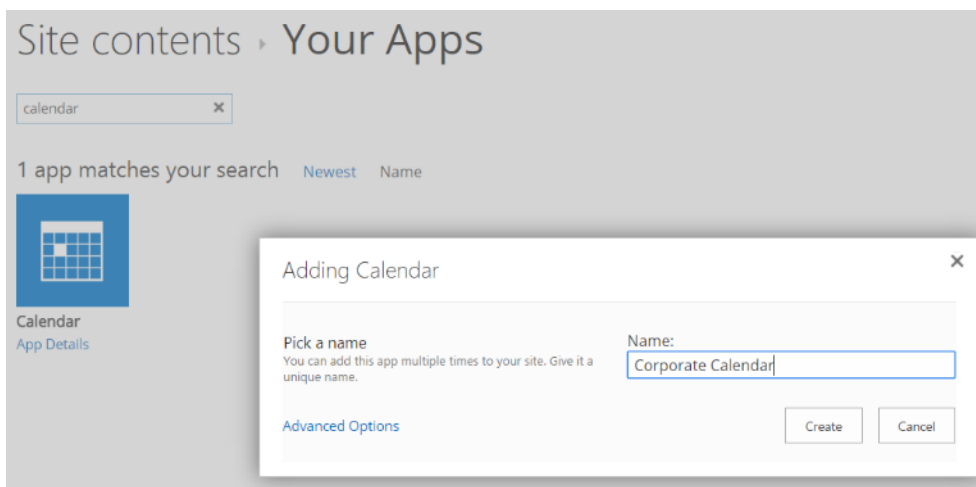
Aggregated Calendar

Setup Aggregated Calendar

1. Go to the start page of a the main publishing site in your solution.
2. Go to Site Settings > Manage site features.
3. Activate the SharePoint feature “Team Collaboration Lists”.




4. Go to Site Contents and create a new Calendar.




5. Go to Omnia Admin > Features.
6. Activate the tenant scoped feature “Omnia Intranet Aggregated Calendar”.
7. (Note! If you want to add support for the Aggregated Calendar legacy web part, go to Omnia Admin > Features and activate the site collection scoped feature “Omnia Intranet Aggregated Calendar Web Part”.)

Follow these steps to setup targeting for aggregated calendars.

8. Go to Omnia Admin > Aggregated Calendar.
9. Add a calendar on the site and select a targeting definition.
10. Click on Save.


Targeting: **Intranet** 

Calendar

Corporate Calendar 


Enable targeting on this calendar by selecting a Targeting Definition. This action will create new targeting columns in the selected calendar.

☐ No targeting
☒ Target to

Department and Location 


Save

11. The required columns will now be added to the aggregated calendar. Note! The only way for an editor to add targeted events is via the Omnia Aggregated Calendar block edit UI.

Calendar Corporate Calendar  [Add](#)

Selected Calendars Use Targeting

× [Intranet > Corporate Calendar](#) ☒

Intranet > Corporate Calendar  Time Zone : (UTC+01:00) Amster

Add Event **Edit Event** **Targeting**

< > today

Mon	Tue	Wed
1	2	3
	Board meeting	
4	5	6

The aggregated calendar control displays events from one or more calendars from any site in the tenant.

Upcoming events

31

08:00 - 09:00

Kids Bike Campaign

Europe

Mar, 2018

The Europe campaign for kids bikes starts today.

31

17:00 - 18:00

Board meeting

Stockholm

Mar, 2018

03

21:00 - 22:00

30 year anniversary

Global

Apr, 2018

Adventrix celebrate 30 year anniversary.

● Corporate Calendar

● Marketing Calendar

SHOW ALL EVENTS

Using the option “Show all events”:

Upcoming events

31

08:00 - 09:00

Kids Bike Campaign

Europe

Mar, 2018

The Europe campaign for kids bikes starts today.

31

17:00 - 18:00

Board meeting

Stockholm

Mar, 2018

03

21:00 - 22:00


30 year anniversary

Global

Apr, 2018

Adventrix celebrate 30 year anniversary.

● Corporate Calendar
● Marketing Calendar


[SHOW ALL EVENTS](#)

Users can access and browse the whole aggregated calendar. It can look like this:

All Events

×

[Select a Calendar to Edit] ▼

< > today

December 2018

month week day

Mon	Tue	Wed	Thu	Fri	Sat	Sun
26	27	28	29	30	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

● Corporate Calendar
● Training Calendar

Settings for the control

The following settings are available:

Aggregated Calendar Settings

×

+ Add Calendar

Selected Calendars	Use Targeting	Accent Color
<div>×</div> Intranet > Corporate Calendar	<input checked="" type="checkbox"/>	<div>*</div> <div> <div></div> <div>#1e8fcc</div> <div>×</div> <div>▼</div> </div>
<div>×</div> Intranet > Training Calendar	<input checked="" type="checkbox"/>	<div>*</div> <div> <div></div> <div>#c30052</div> <div>×</div> <div>▼</div> </div>

Default View

List View

▼

Default Period

Two Weeks from Today

▼

Item Limit

☒ No Limit
 ☐ Row Limit

☒ Show Title

Title

{en-us:Upcoming Events;sv-se:Kommande händelser}

☒ Show Legend

SAVE

CANCEL

- **Add Calendar:** To display events in the aggregated calendar control, at least one calendar needs to be added. See more information below.

- **Use Targeting:** If targeting should be used for the calendar, select this box. Targeting has to be set up in Omnia Admin. It's the same settings for all controls that can use targeting.
- **Accent Color:** Defines the color for some objects, for example date and event name. Another color can be selected from the list.
- **Default View:** Defines how to show the events. Note! Not all views are suitable for all periods, for example it only makes sense to display the Current Month events for the Month View.
- **Default Period:** Defines periods for the events to be displayed.
- **Item Limit:** Default setting is "No Limit". You can limit the number of rows shown by selecting "Row Limit" and set the number of rows.
- **Show Title:** Label to be shown for the control.
- **Show Legend:** If legends for the calendars should be visible, select this box. (The two images at the top have this option activated).

Add a calendar

Follow these steps to add a new calendar:

1. Click "+ Add calendar".

Aggregated Calendar Settings

+ Add Calendar

Selected Calendars	Use Targeting	Accent Color
<div>×</div> <div>Intranet > Corporate Calendar</div>	<input checked="" type="checkbox"/>	<div> <div>*</div> <div> <div></div> <div>#1e8fcc</div> <div>×</div> <div>▼</div> </div> </div>
<div>×</div> <div>Intranet > Training Calendar</div>	<input checked="" type="checkbox"/>	<div> <div>*</div> <div> <div></div> <div>#c30052</div> <div>×</div> <div>▼</div> </div> </div>

Default View

List View

▼

Default Period

Two Weeks from Today

▼

Label

Upcoming events

☒ Show Legend

You can now add calendars from the current site (default) or from any other site in the tenant.

To add calendar from the current site:

1. Open the list “Calendar” and select calendar.
2. Click “Add”.



Aggregated Calendar Settings [X]

Site Url

☒ Current Site

☐ RESOLVE

Calendar Corporate Calendar Add

Selected Calendars	Use Targeting	Accent Color
× Intranet > Corporate Calendar	<input checked="" type="checkbox"/>	*  #1e8fcc × ▾
× Intranet > Training Calendar	<input checked="" type="checkbox"/>	*  #c30052 × ▾

To add a calendar from another site:

1. Active the text box.
2. Enter the url to the site where the calendar is located and click “Resolve”.



Aggregated Calendar Settings [X]

Site Url

☐ Current Site

☒ RESOLVE

Calendar Corporate Calendar Add

Selected Calendars	Use Targeting	Accent Color
× Intranet > Corporate Calendar	<input checked="" type="checkbox"/>	*  #1e8fcc × ▾
× Intranet > Training Calendar	<input checked="" type="checkbox"/>	*  #c30052 × ▾

3. Open the list “Calendar” and select calendar. (If no calendars are found a message will be shown.)

4. Click “Add”.

All selected calendars are shown at the top, just under “Query Settings”.

Remove a calendar

To remove a calendar just:

1. Click the x for the calendar in the list of active calendars.

Aggregated Calendar Settings

+ Add Calendar

Selected Calendars	Use Targeting	Accent Color
<div><div>×</div><div>Intranet > Corporate Calendar</div></div>	<input checked="" type="checkbox"/>	<div><div>*</div><div><div></div><div>#1e8fcc</div><div>×</div><div>▼</div></div></div>
<div><div>×</div><div>Intranet > Training Calendar</div></div>	<input checked="" type="checkbox"/>	<div><div>*</div><div><div></div><div>#c30052</div><div>×</div><div>▼</div></div></div>

Default View

List View

▼

Default Period

Two Weeks from Today

▼

Label

Upcoming events

☒ Show Legend

Edit a calendar

If you have permissions to edit a calendar, you can do that this way:

1. Click “SHOW ALL EVENTS”.

Upcoming events

11

GDPR training
12:00 - 13:00

Dec 2018

19

Strategy Update: What's around the corner?
Broadcast
Join the Broadcast using this link.

Dec 2018

● Corporate Calendar ● Training Calendar

SHOW ALL EVENTS

2. Use the list at top left to to select calendar to edit.

All Events

[Select a Calendar to Edit]

Intranet > Corporate Calendar

Intranet > Training Calendar

December 2018

month week day

Wed	Thu	Fri	Sat	Sun
28	29	30	1	2
3	4	5	6	7
10	11	12	13	14
17	18	19	20	21
24	25	26	27	28
31	1	2	3	4

● Corporate Calendar ● Training Calendar

You can add events now. To edit and delete events or edit targeting, select the event.

All Events

[Select a Calendar to Edit]

Intranet > Training Calendar

Time Zone : (UTC+01:00) Amsterdam, Berlin, Bern, Rome, Stockholm, Vienna

ADD EVENT

EDIT EVENT

TARGETING

< > today

December 2018

month week day

Mon	Tue	Wed	Thu	Fri	Sat	Sun
26	27	28	29	30	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

GDPR training

Office 365 Training

Corporate Calendar

Training Calendar

Targeting a calendar

By default all users of the intranet can see all calendars, but you can set that a calendar should be shown just for some users. One example could be a calendar for a specific office. Here's how target a calendar:

1. Select the calendar as shown under *Edit a calendar*.
2. Click "TARGETING".

All Events

[Select a Calendar to Edit]

Intranet > Training Calendar

Time Zone : (UTC+01:00) Amsterdam, Berlin, Bern, Rome, Stockholm, Vienna

ADD EVENT

EDIT EVENT

TARGETING

< > today

December 2018

month week day

Mon	Tue	Wed	Thu	Fri	Sat	Sun
26	27	28	29	30	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

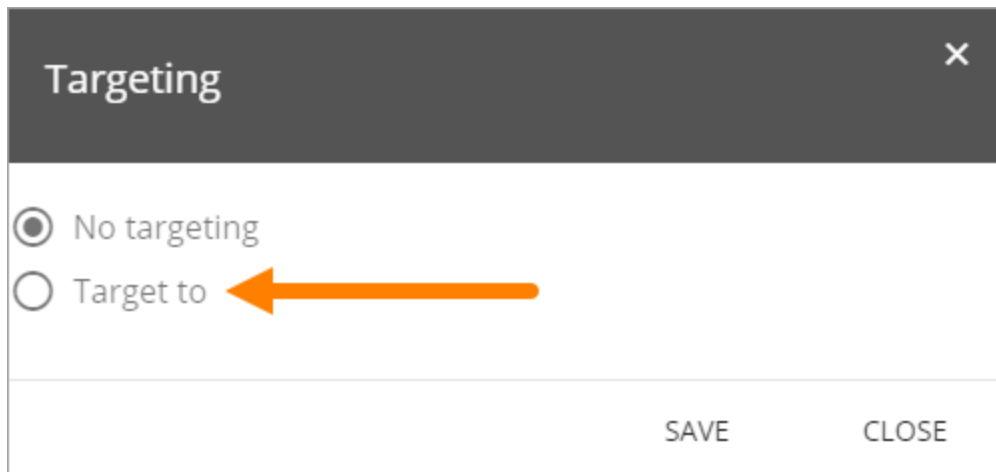
GDPR training

Office 365 Training

Corporate Calendar

Training Calendar

3. Click "Target to".

A dialog box titled "Targeting" with a close button (X) in the top right corner. It contains two radio button options: "No targeting" (selected) and "Target to" (unselected). An orange arrow points to the "Target to" option. At the bottom right, there are "SAVE" and "CLOSE" buttons.

Targeting

☒ No targeting

☐ Target to

SAVE CLOSE

4. Use the available fields to target to a specific group of users.

Available fields can differ depending on how targeting is set up in Omnia Admin. Here's a common example:

Targeting

No targeting

Target to

Organization

Location

Role

SAVE

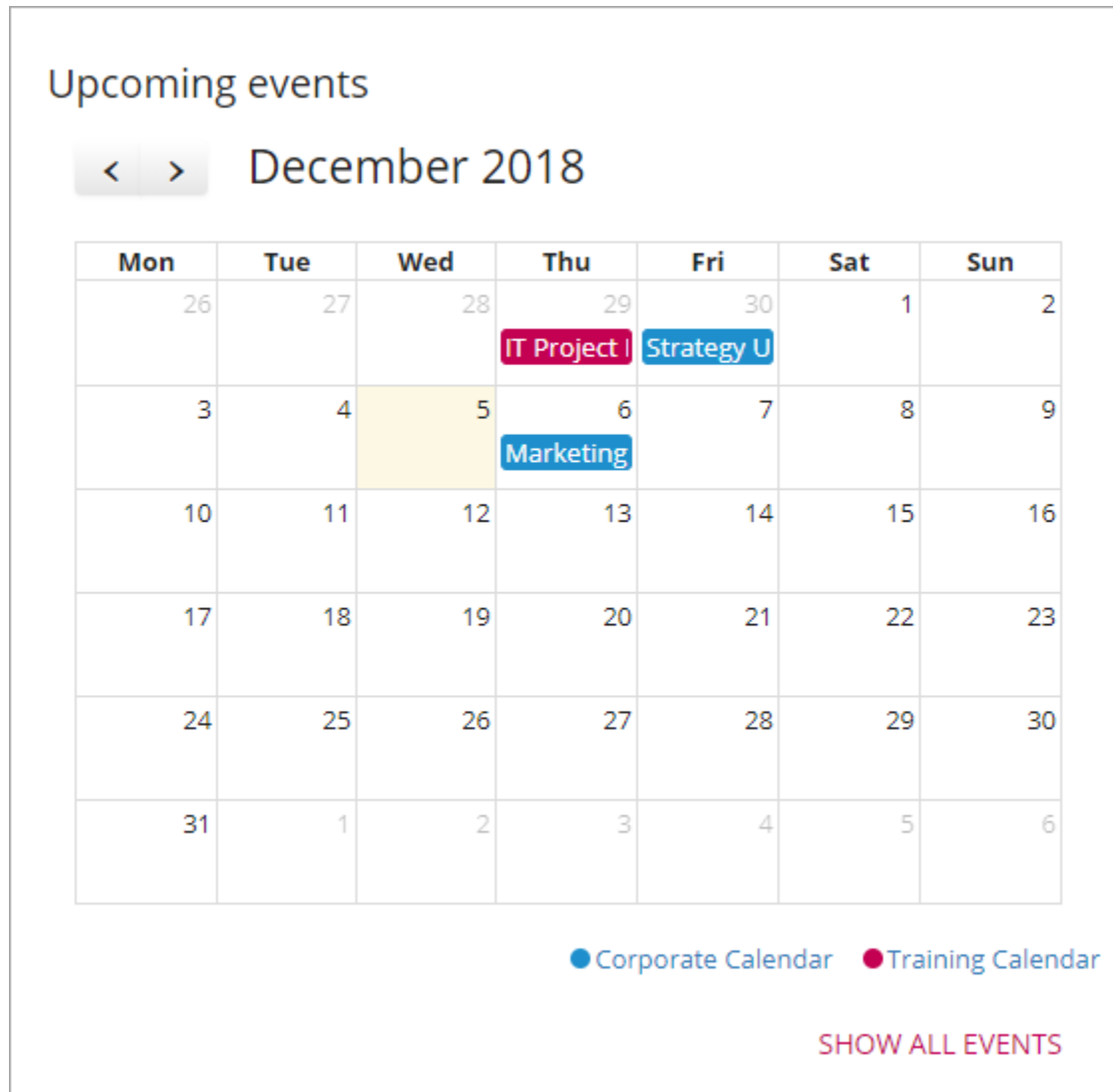
CLOSE

Don't forget to save when you're done.

More on Default views

The list view displays all events from the selected default period in a list. It is the preferred view if you want to focus on upcoming events. (See the image at the top of the page.)

The Month Calendar view displays all events from the selected default period in a monthly calendar. It is possible to navigate from month to month using the navigation arrows at the top. The current day will be shown with a different background color. The user can hover over an event to show detailed information about it.



The Week Calendar view displays all events from the selected default period in a weekly calendar. It is possible to navigate from week to week using the navigation arrows at the top. The current day will be shown with a different background color. The user can hover over an event to show detailed information about it.

Upcoming events

< > Dec 3 – 9, 2018

	Mon 12/3	Tue 12/4	Wed 12/5	Thu 12/6	Fri 12/7	Sat 12/8	Sun 12/9	
all-day								
6am								
7am								
8am				Marketin Forum Europe				
9am								
10am								

● Corporate Calendar ● Training Calendar

[SHOW ALL EVENTS](#)

There's also a Summary View:

Upcoming events

Tomorrow | Marketing Forum Europe
 Dragao Arena, Lisbon
 08:00 - 21:00

● Corporate Calendar ● Training Calendar

[SHOW ALL EVENTS](#)

This view is used to show events from the actual day and the next day in a special format.

Aggregated Calendar in Notification Panel

The Aggregated Calendar control is available in the Notification Panel. If the Aggregated Calendar is added to the panel, a notification count icon will be shown if there are events in the default view, that are new to the user.

Aggregated Calendar block and Web Part

The Aggregated Calendar control can also be added to a Quick Page as a block and to a legacy page as a web part.

Banners

Setup Banners

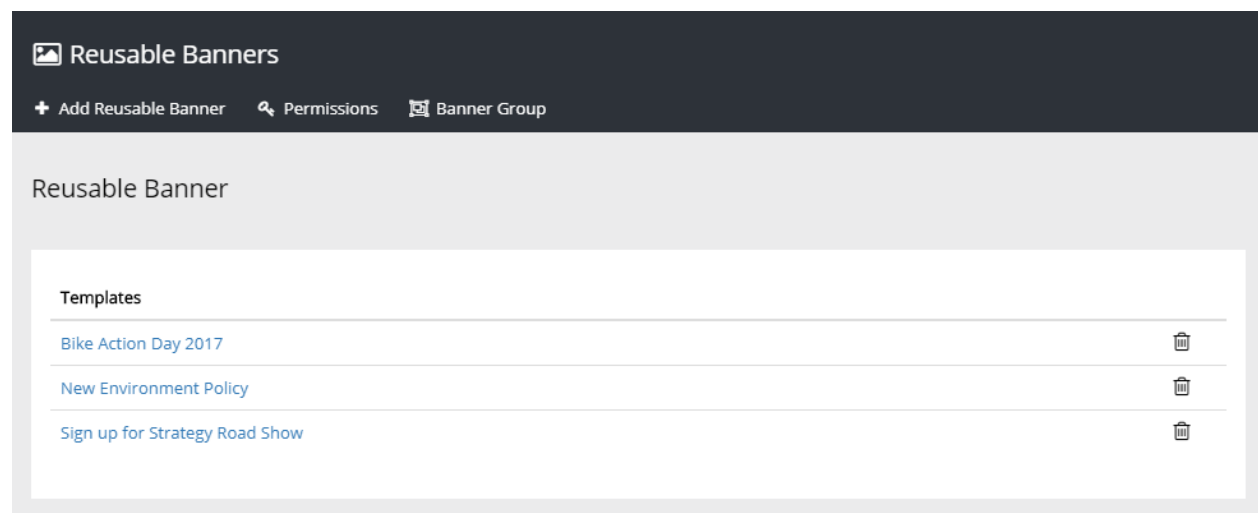
1. Go to Omnia Admin > Features.
2. Activate the tenant feature “Omnia Intranet Banners”.
3. (If you want to add support for the Banner legacy web part, go to Omnia Admin > Features and activate the site collection scoped feature “Omnia Intranet Banner Web Part”.)

A banner can either be a centrally managed banner that can be reused on several web pages (Reusable Banner or a Banner Group), or created “locally” through the Banner Control.

Reusable Banners

Reusable banners are created by an administrator and are available for editors to use on any publishing page. Reusable banners can also be grouped to a Banner Group. An editor can only add a reusable banner or a banners group to a page. The editor can not edit such banners in any way.

Note! If a reusable banner should be targeted, that has to be done by an editor when the banner is added to a page.



If additional users should be able to create reusable banners, use the “Permissions” option.

Creating a reusable banner works the same way as creating a custom (local) banner, see below.

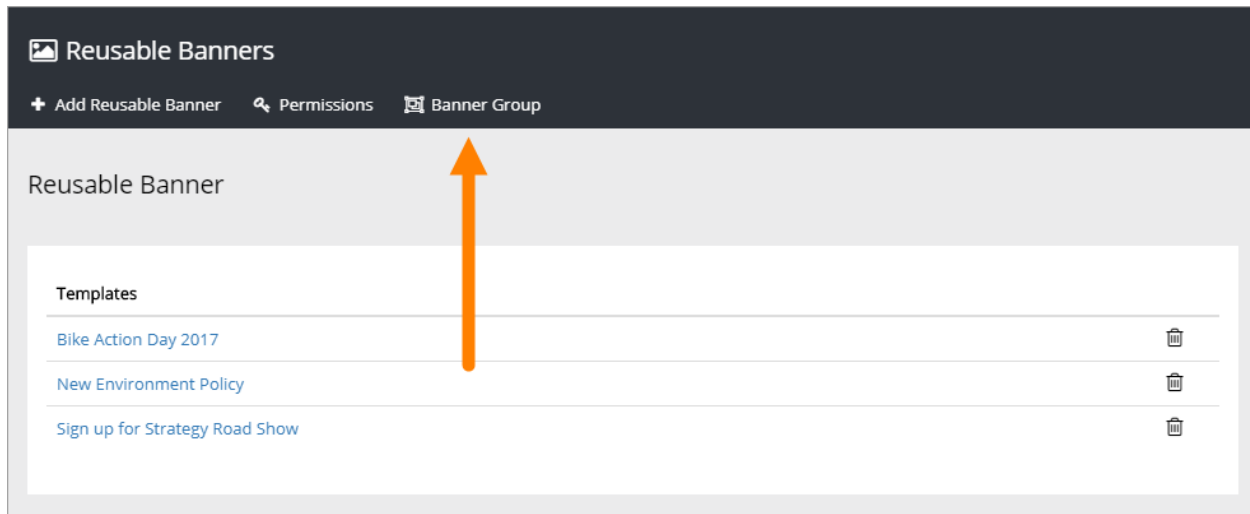
There is just one extra field. A reusable banner must have a name.

Banner groups

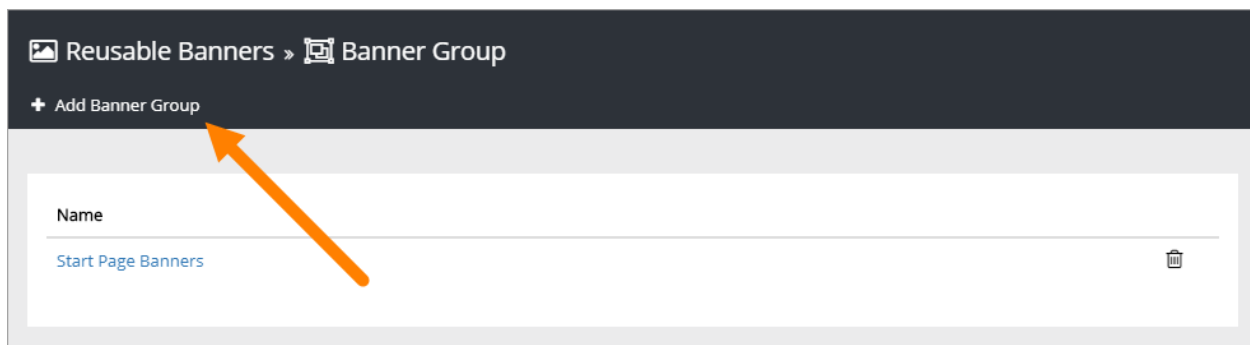
Reusable banners can be grouped. When displayed on a page the banners in the group will alternate every time the user enters the page or refreshes the page. Per default, the banners alternate in the order they are set up, but a page editor can choose to randomize.

To create a banner group, do the following:

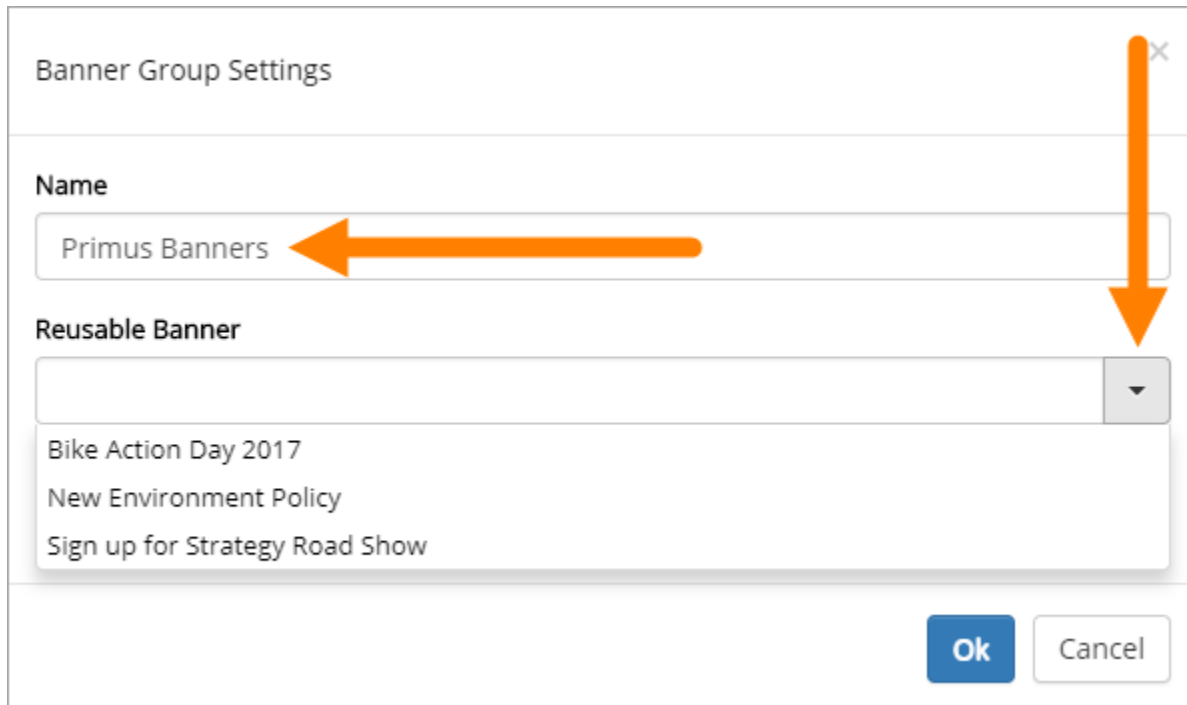
1. See too that all reusable banners for the group are created.
2. Select “Banner Group”.



3. Click “Add banner group”.



4. Add a name for the group.
5. Open the list of reusable banners and select the banners for the group, one after another.



Banner Group Settings

Name

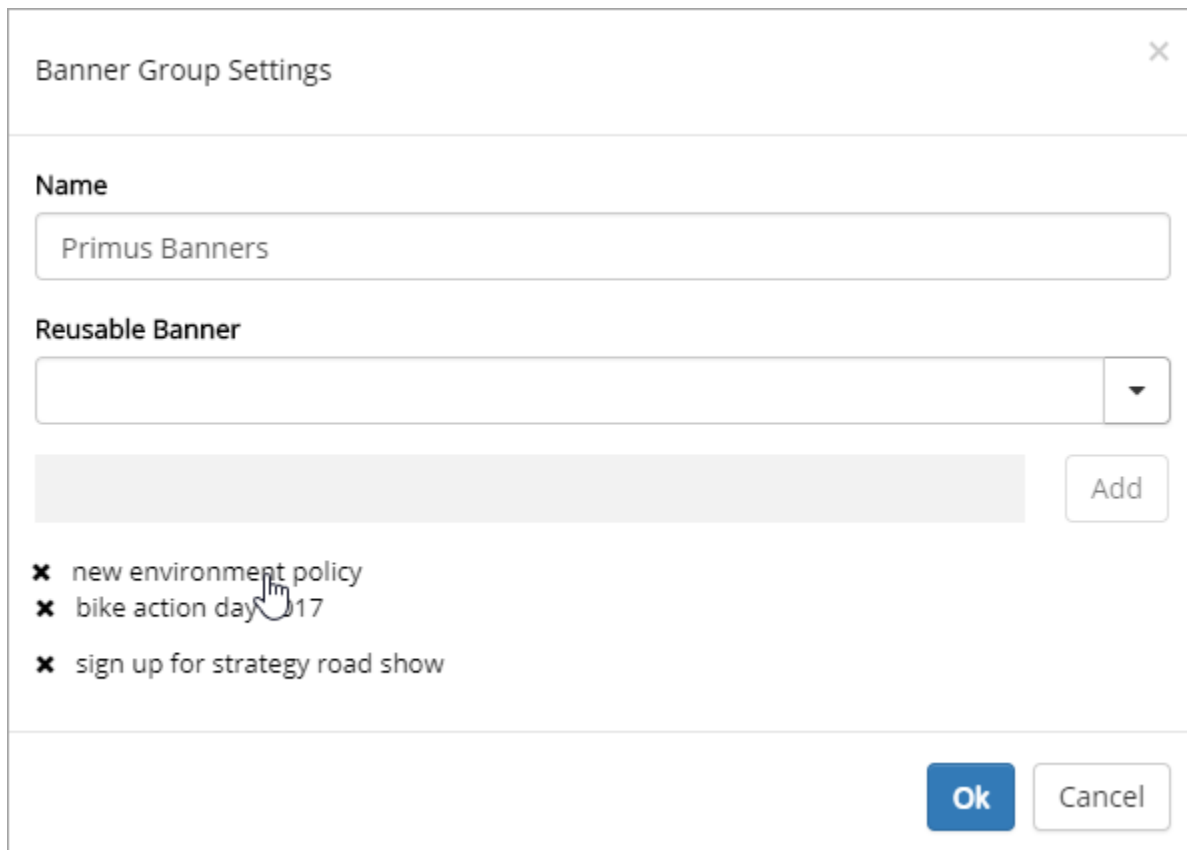
Primus Banners

Reusable Banner

Bike Action Day 2017
New Environment Policy
Sign up for Strategy Road Show

Ok Cancel

The order in which the banners will alternate is from top to bottom, if the editor does not select “Randomize” when adding the banner group to a page. If you would like to change the order, use drag and drop.



Banner Group Settings

Name

Primus Banners

Reusable Banner

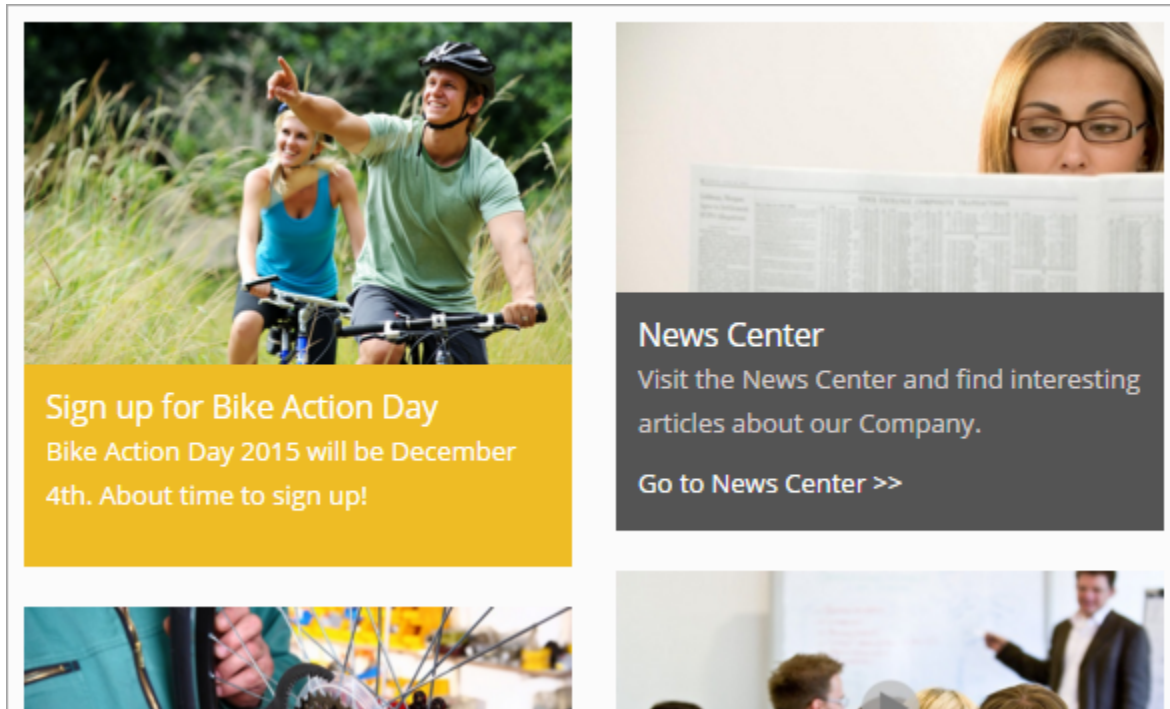
Add

- ✕ new environment policy
- ✕ bike action day 2017
- ✕ sign up for strategy road show

Ok Cancel

The Banner Control

Through the Banner control a web editor can add banners on a web page.



The control can be used add centrally handled banners to a page, or for “local” banners, created and edited on a specific web page.

The first step is always to add a web part to a legacy page or a block to a Quick Page, for the control.

Here’s how to add a web part to a legacy page:

1. Go to the page.
2. Edit the page in advanced mode.
3. Add the web part to a suitable web part zone. The web part is called “Banner” and is found in the “Omnia” Category.
4. Check in the page. (You must do that to be able to access the settings.)

Here’s how to add a block to a Quick Page:

1. Go to the page.
2. Click Show/hide edit icons.
3. Add the block to a suitable area. The block is called “Banner” and is found under Omnia.Intranet.

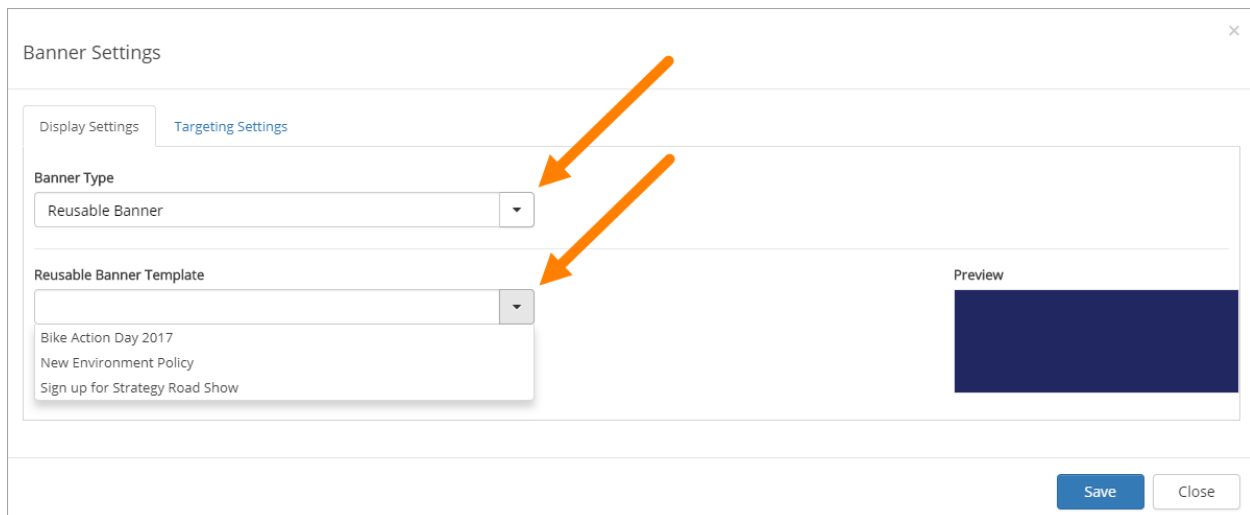
To access the settings for the control, show the edit icons and click the settings gear for the control.

This will open the settings dialog.

Adding a reusable banner

The default banner type is a custom banner used only on the current web page. If you want to use a centrally managed, reusable banner, select “Reusable Banner”. This will display all available reusable banners in the list.

Select the reusable banner that you would like to show on the page.



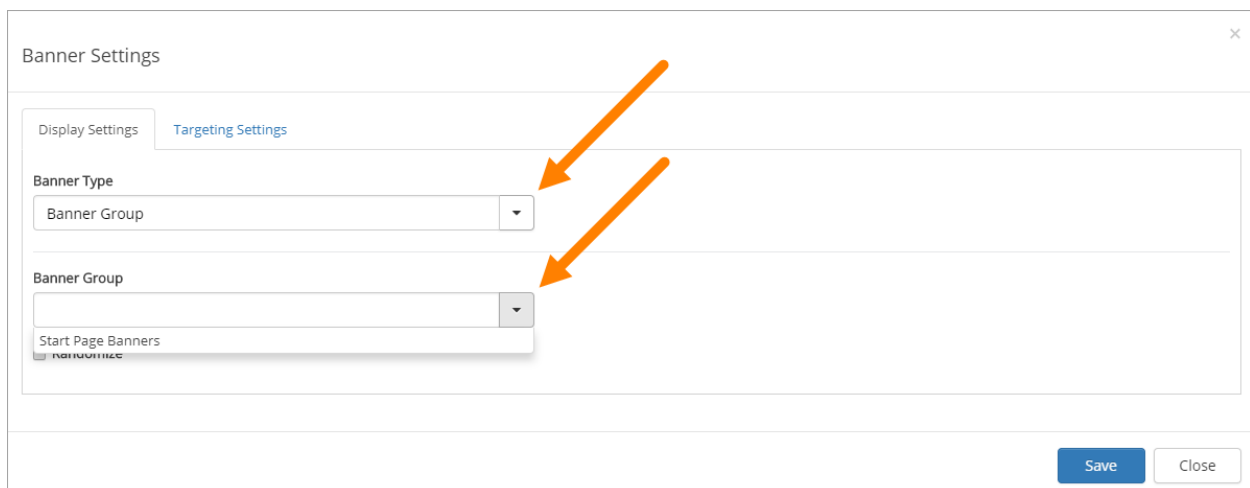
The image shows a 'Banner Settings' dialog box with two tabs: 'Display Settings' and 'Targeting Settings'. Under 'Display Settings', there are two dropdown menus. The first is 'Banner Type' with 'Reusable Banner' selected. The second is 'Reusable Banner Template' with a list of options: 'Bike Action Day 2017', 'New Environment Policy', and 'Sign up for Strategy Road Show'. Two orange arrows point to these dropdown menus. To the right is a 'Preview' section showing a dark blue rectangular banner. At the bottom right are 'Save' and 'Close' buttons.

You can't edit the banner itself. You can just add a reusable banner to the page.

Adding a banner group

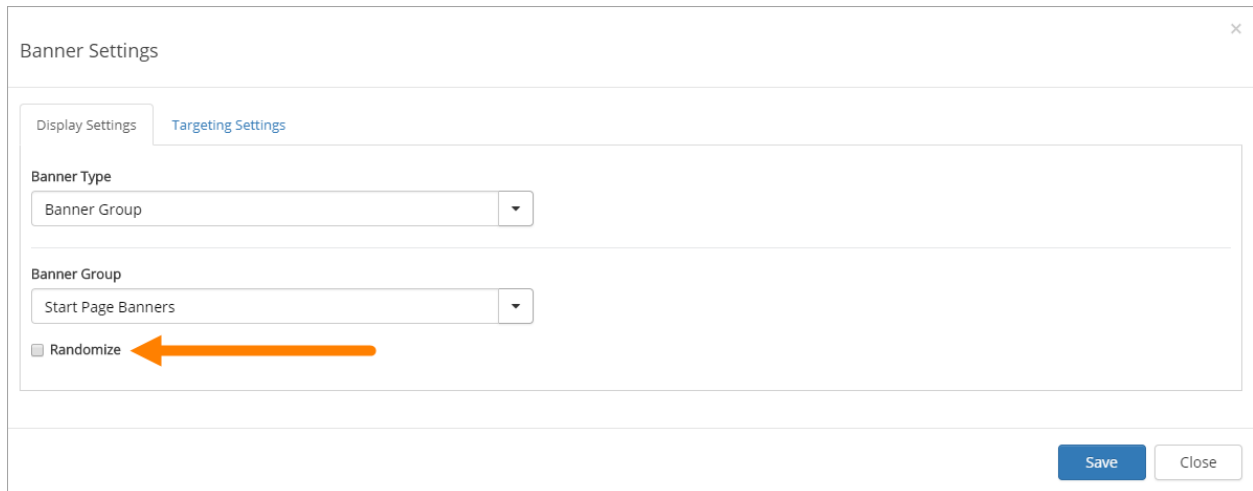
If banner groups are set up in Omnia Admin, you can add a banner group to the page. In a banner group, the banners will alternate every time a user enters or refreshes the page.

Select the banner group that you would like to show on the page.



The image shows a 'Banner Settings' dialog box with two tabs: 'Display Settings' and 'Targeting Settings'. Under 'Display Settings', there are two dropdown menus. The first is 'Banner Type' with 'Banner Group' selected. The second is 'Banner Group' with a list of options: 'Start Page Banners' and 'Randomize'. Two orange arrows point to these dropdown menus. At the bottom right are 'Save' and 'Close' buttons.

You can't edit the banner group here. You can just add a banner group to the page. But you can choose that the banners in the group will be shown randomized (if not selected, the banners will alternate in the order they are set up).



The image shows a 'Banner Settings' dialog box with a close button (X) in the top right corner. It has two tabs: 'Display Settings' and 'Targeting Settings', with 'Targeting Settings' being the active tab. Under 'Banner Type', there is a dropdown menu currently showing 'Banner Group'. Below that, under 'Banner Group', there is another dropdown menu showing 'Start Page Banners'. At the bottom of this section, there is a checkbox labeled 'Randomize' which is currently unchecked. A large orange arrow points from the right towards this checkbox. At the bottom right of the dialog, there are two buttons: 'Save' (in blue) and 'Close' (in white).

Creating a custom banner

To create a custom, local banner, select “Banner” and use the following settings:

- **View Template:** Defines how the banner should be structured: + *Image On Top*: Displays a big image at the top, above title, description and footer. Best suitable for landscape images. + *Title and description on image*: The image covers the whole banner area, title and description are placed as an overlay. + *Title on image*: A variant of the above, in this case only the title is placed as an overlay. + *Image On Right*: Displays a small image to the right and the title, description and footer floating to the left of the image. Best suitable for portrait images.
- **Link Url:** The url to open when the user clicks the banner.
- **Open In New Window:** Defines whether the url should be opened in a new window or not.
- **Pick link in advanced mode:** Click on this link to select a page or document in the current site collection, for the Link Url, using a link picker.
- **Image and Background Color:** Select the image and background color that should be used by the banner.
- **Title and Color:** Enter a banner title and a text color.
- **Content and Color:** Enter the banner text and a text color.
- **Footer:** If needed, add a footer to the banner and text color, that will be rendered below the content.

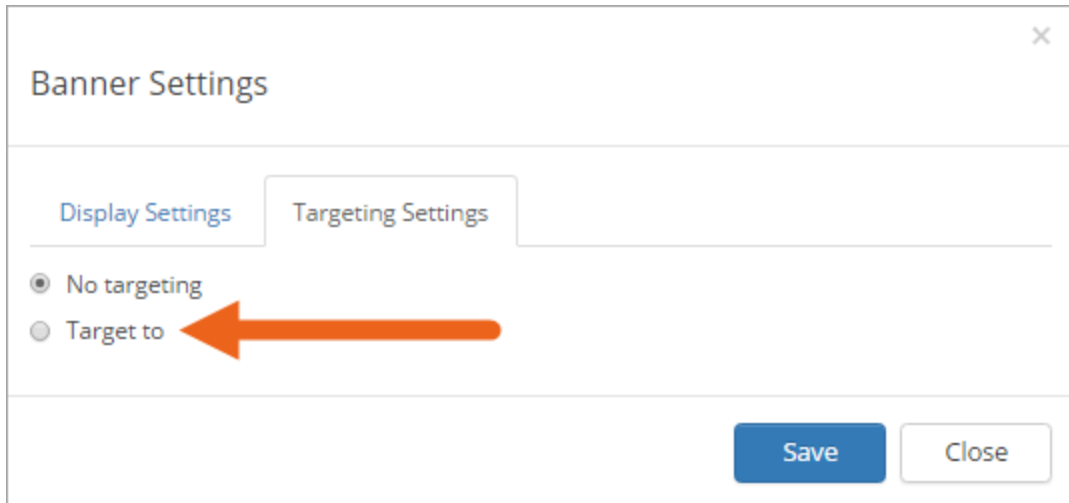
Targeting banners

A banner can be targeted to any receivers that has been defined in Target Definitions. A targeted banner is only displayed to that group. No one else will see it. It works the same for Reusable banners and Custom banners.

For more information on Targeting Definitions, see: [\(link\)targeting-definitions/index.html](#)

To target a banner, do the following:

1. Add the banner, either a reusable banner, a banner group or a custom banner, as stated above.
2. Click the tab “Targeting settings”.
3. Select “Target to”.



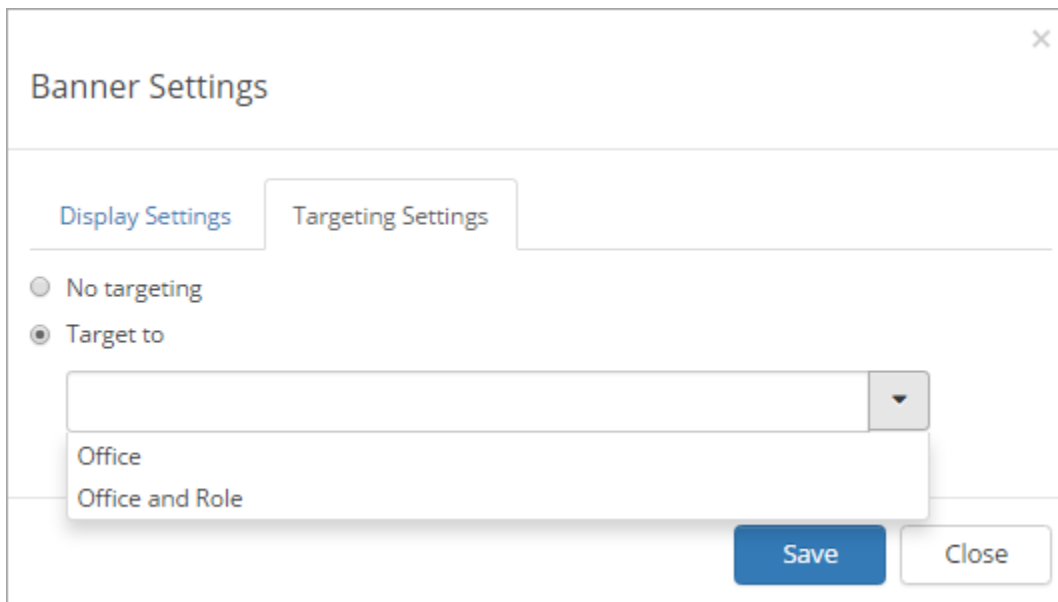
Banner Settings

Display Settings Targeting Settings

☒ No targeting
☐ Target to

Save Close

3. Open the list and select target.



Banner Settings

Display Settings Targeting Settings

☐ No targeting
☒ Target to

Office
Office and Role

Save Close

Banner in Notification Panel






















It is possible to add a Banner control to the notification panel. Note! The Banner control is mainly used in the notification panel category together with another control that will generate the business logic for the notification count icon. The Banner control doesn't generate a notification count.

Document Rollup

You can use this control on any page, both legacy pages and Quick Pages, and even in a team site. Use it to display selected documents available within the site. Reading permissions apply for the users regardless of the settings in the control.

Note! If Omnia Document Management is installed, and the purpose is to display Controlled Documents, don't use this control, use the "View Controlled Documents" control instead.

Here's an example of a document list created with the Document Rollup control:

Search 			
Title		Modified	
 20 Years of Research.docx		2017-03-17	
 20120803-ProjectA.docx		2017-03-18	
 2Q Report of Expenditures.docx		2017-03-17	
 2Q Report of Expenditures.docx		2017-03-17	
 2Y Market Segment Performance.docx		2017-03-17	
 Adoption-Case-template.docx		2017-03-18	
 Adventrix-Word-Template.docx		2017-03-29	
 Adventrix-Word-Template.docx		2017-03-27	
 Adventrix-Word-Template.docx		2017-03-29	
 After Actions Review.docx		2017-03-17	

Settings for the control

The following settings are available for the control:

Document Rollup Settings

General

Query

Columns

Refiners

Custom Colors

Title

Component Title

Default Sort Order

Sort Direction

Ascending

Page Size

20

Show Search Box

☒

Open in Office Web Apps

☐

Open link in new window

☐

Save

Close

The General tab

On the General tab, the following settings are available:

- **Heading:** Here you can change the heading shown for the control.
- **Default Sort Order:** Select sort order. What sort orders are available can differ depending on the Content Management Properties for the site.
- **Sort Direction:** Select Ascending or Descending sorting.
- **Page Size:** Defines the number of objects to display per list “page”.
- **Show Search Box:** Select if it should be possible to search the list (and then you must of course have a Search Box).
- **Open in Office Web Apps:** Select if documents should be opened in Office Web Apps or in locally installed applications (which in some cases, for example for PDF:s, will result in a download).

- **Open link in new window:** If you would the document to be opened in a new window, check this box.

The Query tab

Here you add queries, which is the detailed “settings” for what to display in the list, this way:

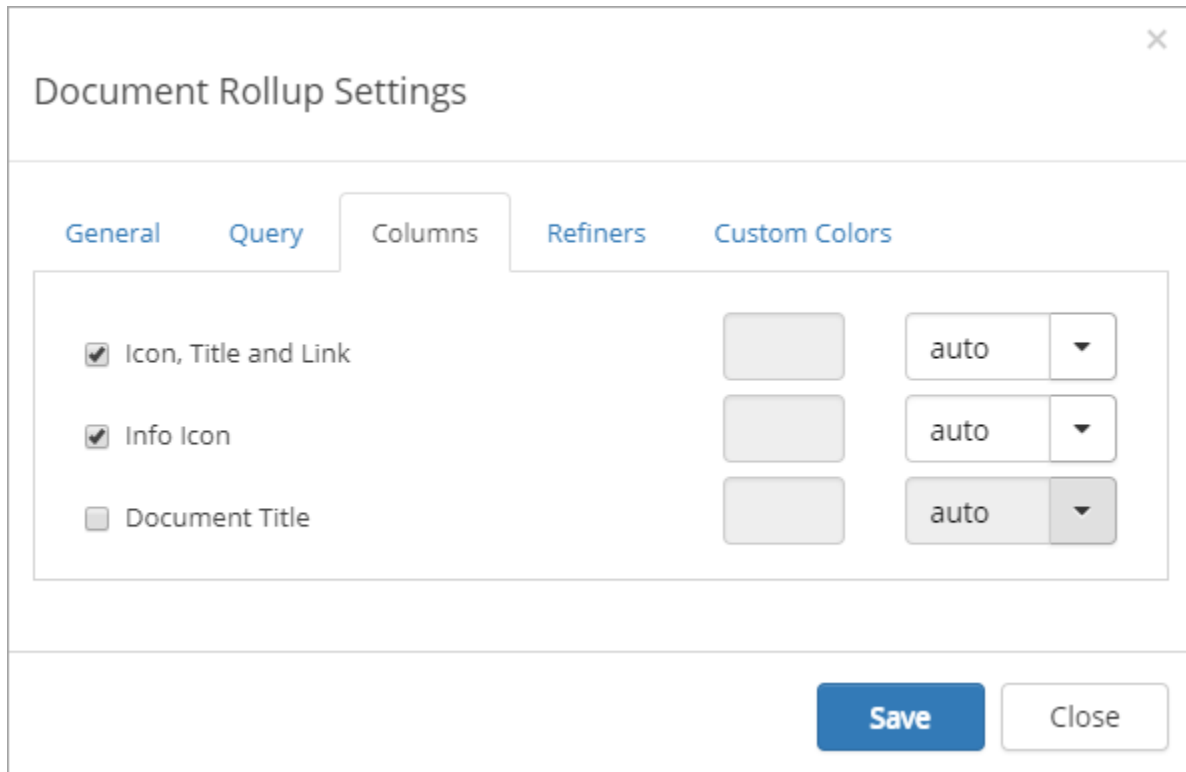
1. Select settings for the query, and click “Add filter”.

Here’s an example of a query for displaying pdf:s in the list (docx already added). You can see the actual queries in the field below, which was added when clicking ” Add filter”.

The screenshot shows a dialog box titled "Document Rollup Settings" with a close button (X) in the top right corner. The dialog has five tabs: "General", "Query", "Columns", "Refiners", and "Custom Colors". The "Query" tab is selected. Inside the "Query" tab, there is a section labeled "Query Text". Below this label, there are four input fields: "File Ext", "Ec", "Query pa", and "pdf". Each of the first three fields has a dropdown arrow. To the right of these fields is a blue button labeled "Add filter". Below the input fields is a large text area containing the following text: "{Property.File Extension}=docx", "OR", and "{Property.File Extension}=pdf". At the bottom right of the dialog, there are two buttons: "Save" (in blue) and "Close" (in white).

The Columns tab

Here you decide what to show in the list:



Document Rollup Settings

General Query **Columns** Refiners Custom Colors

☒ Icon, Title and Link

☒ Info Icon

☐ Document Title

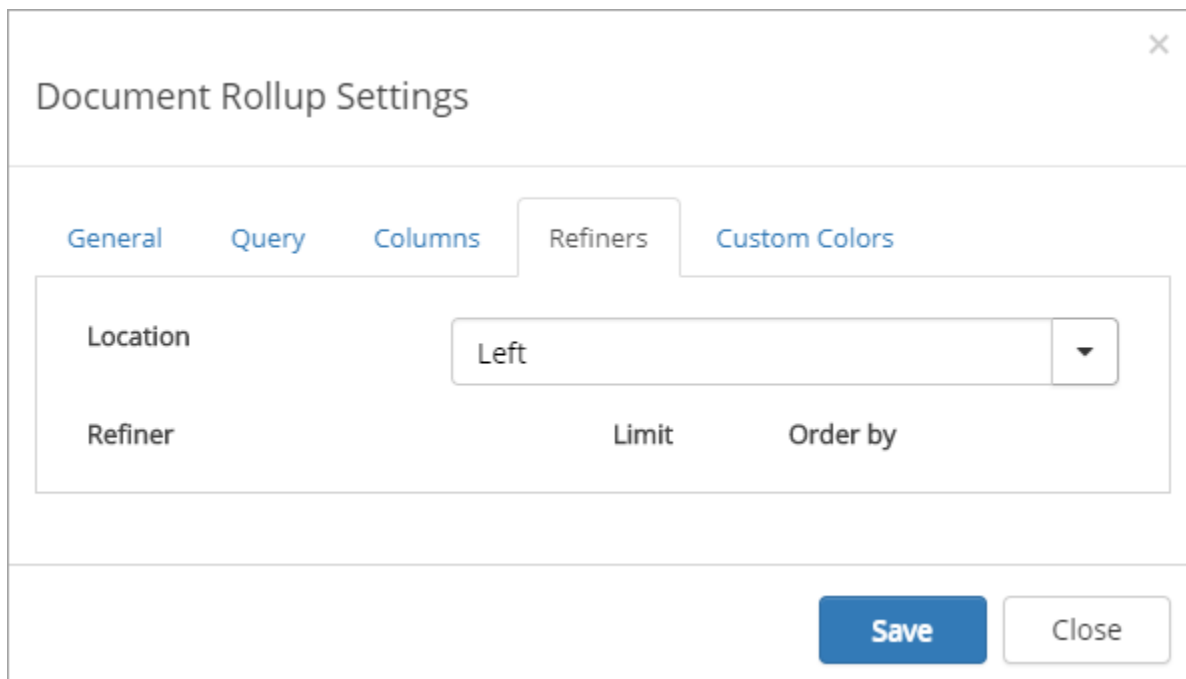
auto
 auto
 auto

Save Close

To the right you can choose width for each selected column: auto, as a percentage or fixed pixel width.

The Refiners tab

Here you select refiners to show for the list:



Document Rollup Settings

General Query Columns **Refiners** Custom Colors

Location Left

Refiner Limit Order by

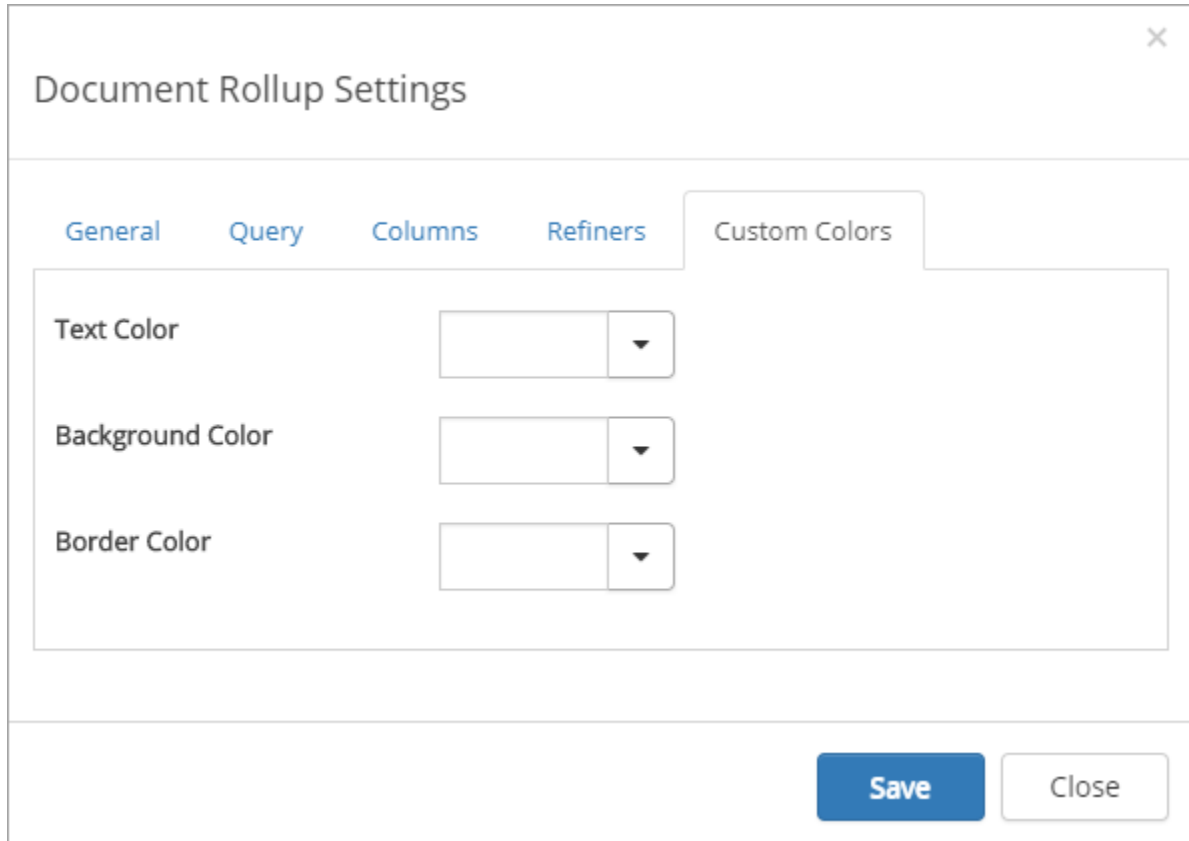
Save Close

- **Location:** Select the placement of the refiners: Top, Left or Right.

- **Refiner:** Activate available refiners here.
- **Limit:** Set the number of values for the refiner to be displayed. If there's more a "Show more" link is displayed.
- **Order by:** Set the sorter order for the values. Can be either alphabetical order (default) or by Count (number of documents).

The Custom Colors tab

You should primarily set colors through Theme colors in Omnia Admin (System/Settings/Default colors). If you still would like custom colors for the control, you can set them using this tab.



The screenshot shows a modal window titled "Document Rollup Settings" with a close button (X) in the top right corner. Inside the modal, there are five tabs: "General", "Query", "Columns", "Refiners", and "Custom Colors". The "Custom Colors" tab is currently selected. Below the tabs, there are three rows of settings, each with a label and a color selection control (a text box followed by a dropdown arrow):

- Text Color**: The control is empty.
- Background Color**: The control is empty.
- Border Color**: The control is empty.

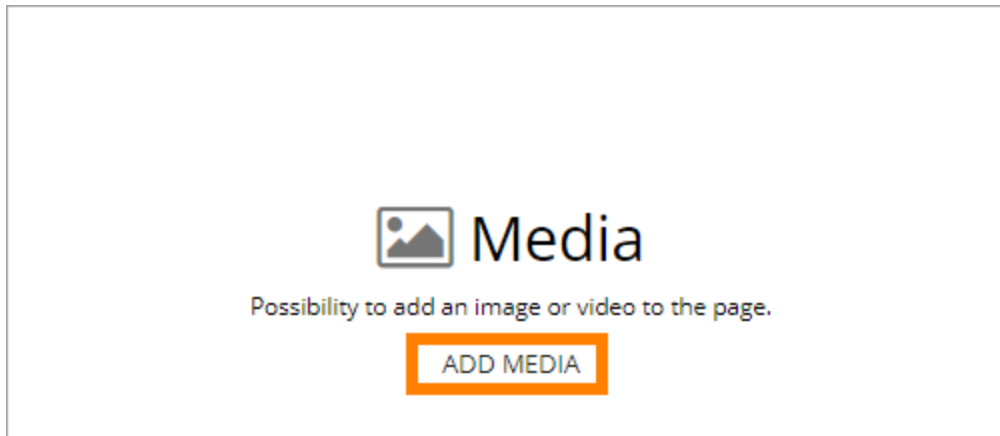
At the bottom right of the modal, there are two buttons: a blue "Save" button and a white "Close" button with a grey border.

Media Block

Use the Media block to add an image or a video anywhere on a page. The following file types can be used for images: tiff, pjp, pjpeg, jfif, tif, gif, svg, bmp, png, jpeg, svgz, jpg, webp, ico, xbm, dib.

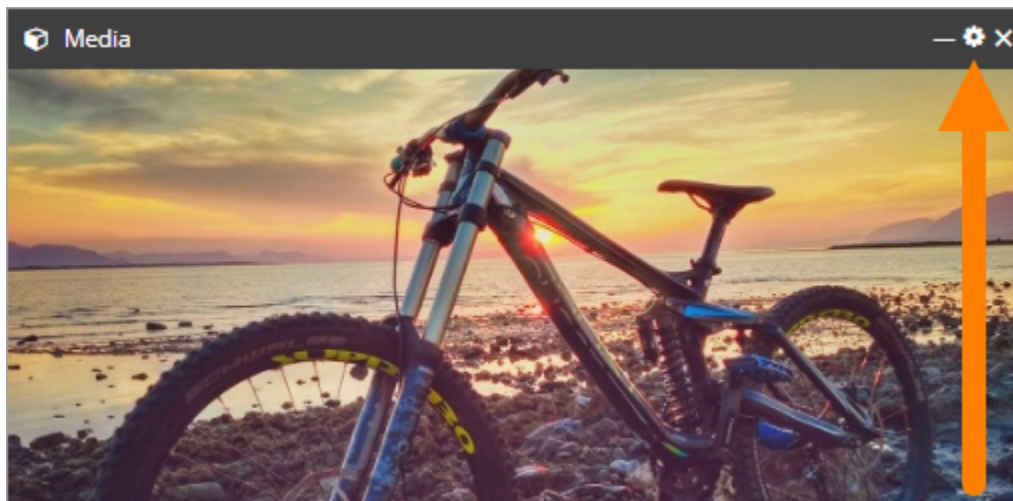
Add an image or a video

When you have added the block to a page you can click ADD MEDIA:



You can then use the Media Picker to add an image or a video. See this page for more information about the Media Picker: [Media Picker](#)

When you edit a page with an image or a video, you click the cog wheel to access the Media Picker for changes or to replace the image or video:



Settings

The settings for the block are those available in the Media Picker, there's not other settings.




Quick Poll

Setup Quick Polls

1. Go to Omnia Admin > Features.
2. Activate the tenant scoped feature "Omnia Intranet Polls".

Through the Quick Poll control a web editor can add a poll on a web page (the questions are created in Omnia Admin, see Quick Polls Administration, below). Quick Polls can be added as a web part to any standard Sharepoint page and as a block to any Quick Page.

Here's an example on how an end users would see a Quick Poll:



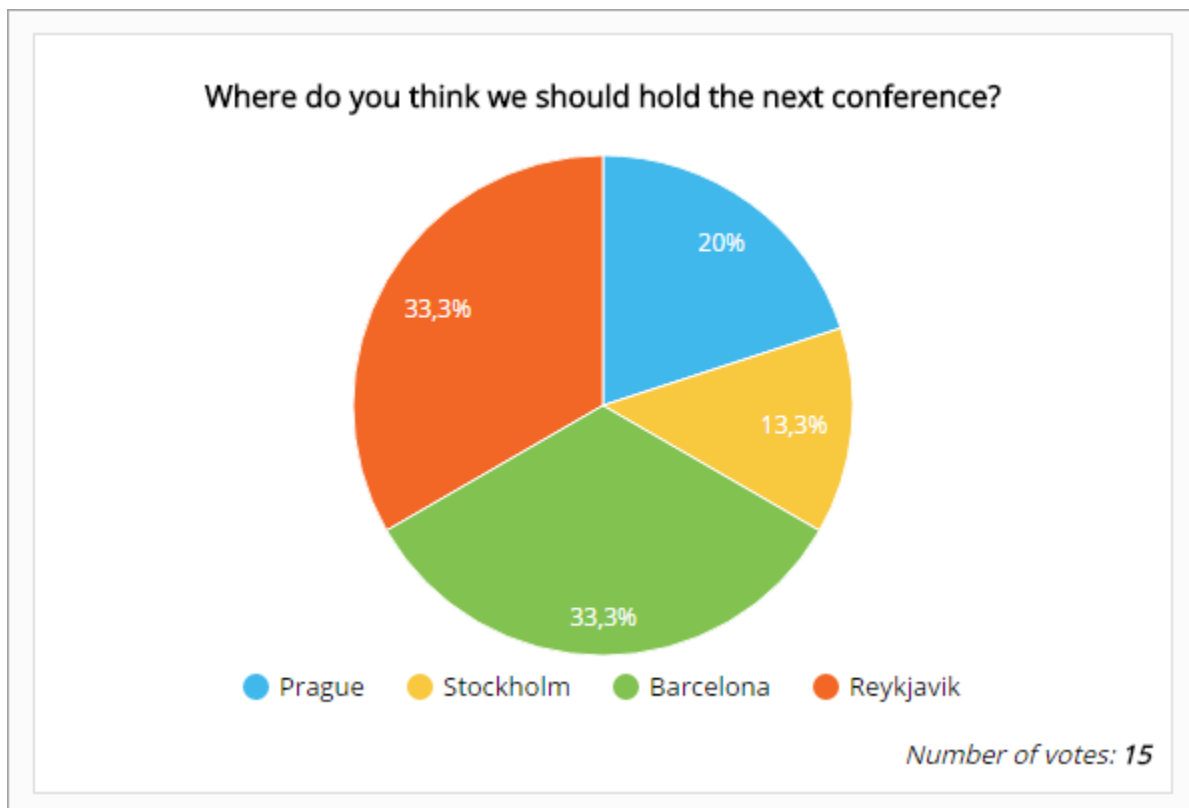
Where do you think we should hold the next conference?

- ☐ Prague
- ☐ Stockholm
- ☐ Barcelona
- ☐ Reykjavik

Vote

Note! As usual you must publish the page for any changes to be shown for the users.

When a user has voted, the present result is shown, for example:

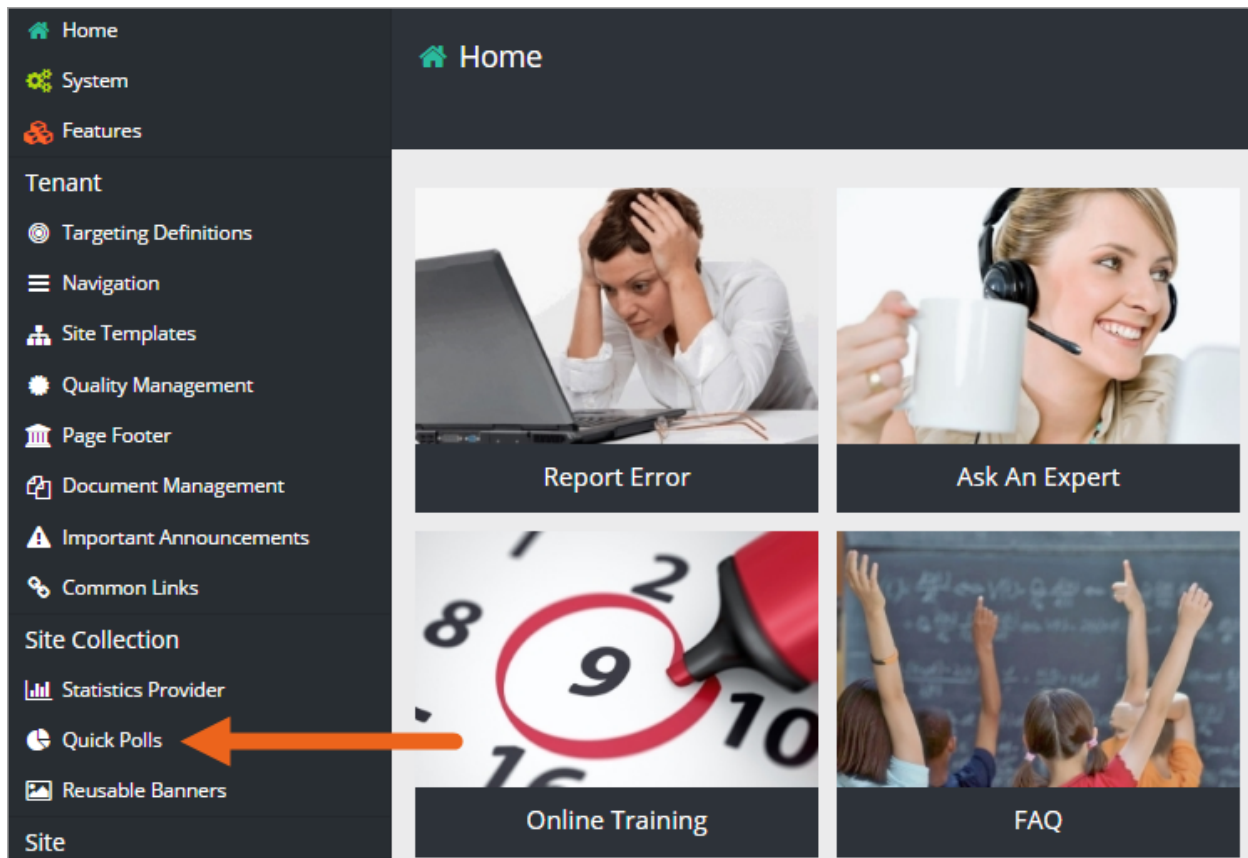


Note! Whether a user has answered the poll or not is stored as a cookie in the web browser. If another web browser is used or the cookies are cleared, the user will be able to vote again.

Quick Polls Administration

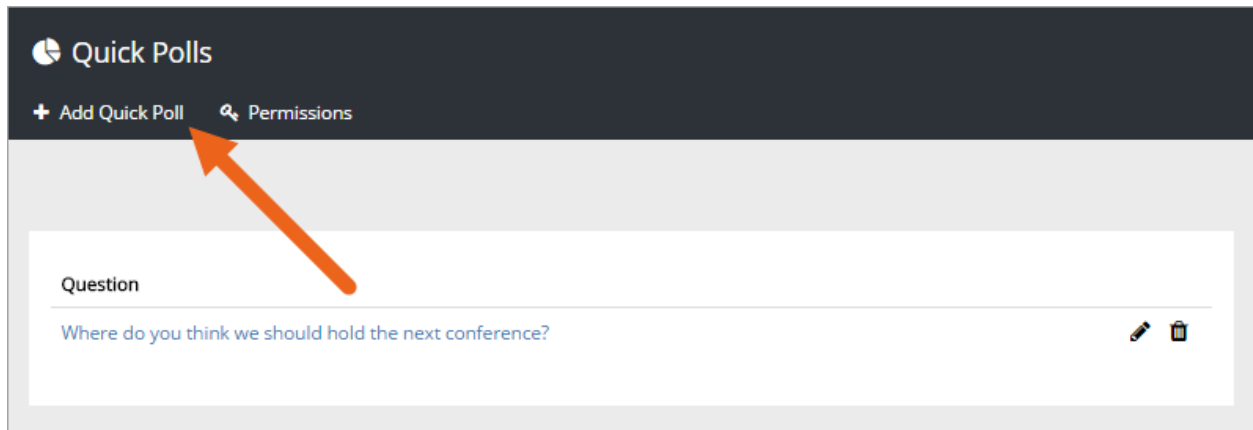
You use this option in Omnia Admin to create the polls and then any editor can place any active poll on the start page or on any web page in the intranet.

An administrator, and others that are assigned the permissions, can create Quick Polls. Any editor for publishing pages can then add a Quick Poll (or several) to any publishing page. Quick Polls can of course also be added on the start page.

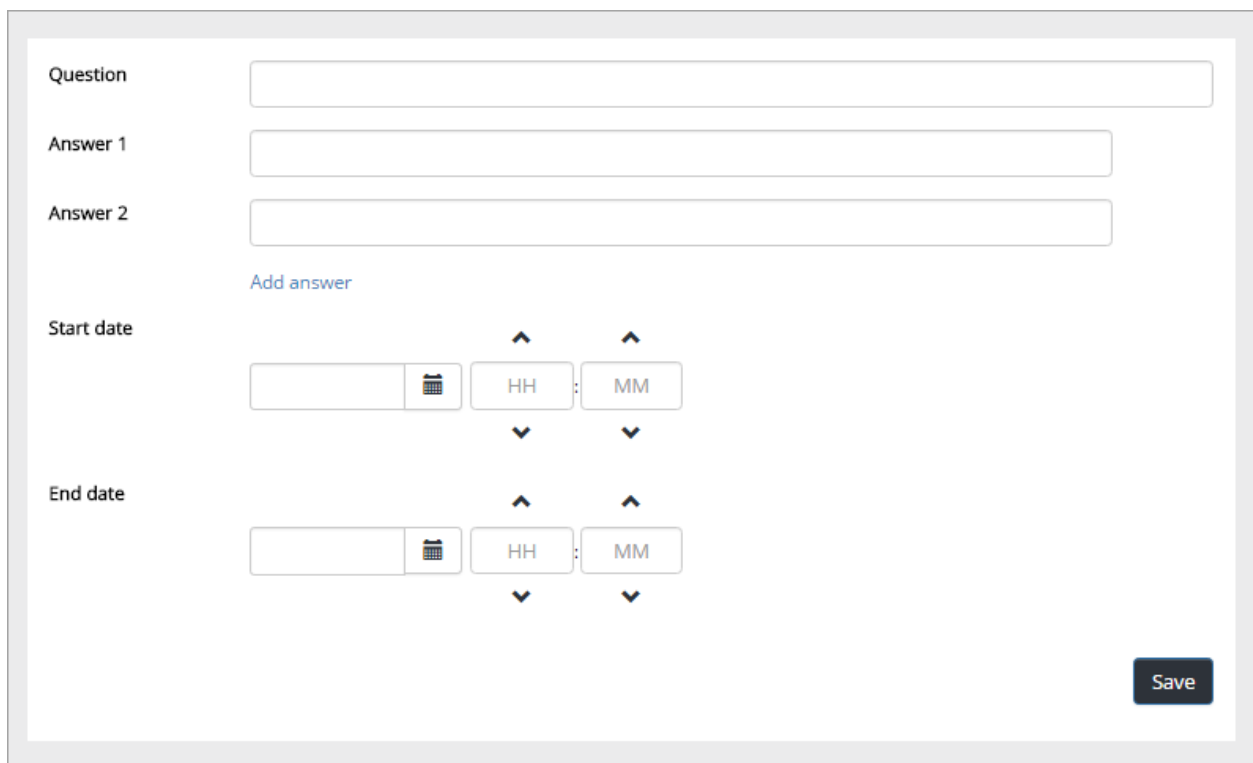


Create a new Quick Poll

- Click “Add Quick Poll”.



Use the following settings:



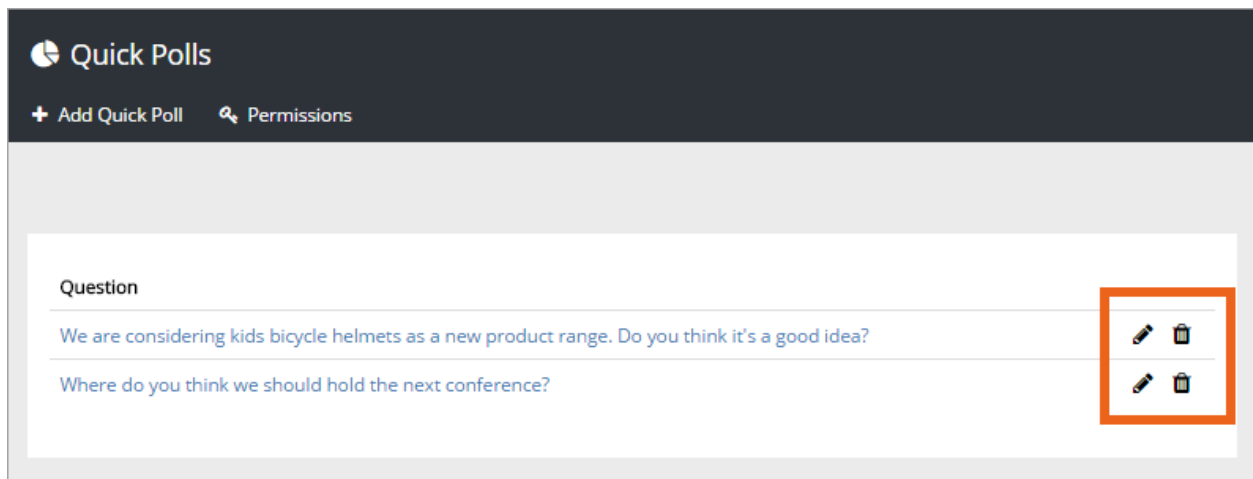
- **Question:** Add the question here.
- **Answers:** Add two or more answers to choose from. The default is two answers. Click “Add answer” to add more answer fields.
- **Start date:** Select start date and time for the poll.
- **End date:** Select end date and time for the poll.

Note! The Quick Poll must be active to be added to a page - withing the start- and end date. If an editor tries to add a poll that is not active, an error message is shown.

Don't forget to save when your done.

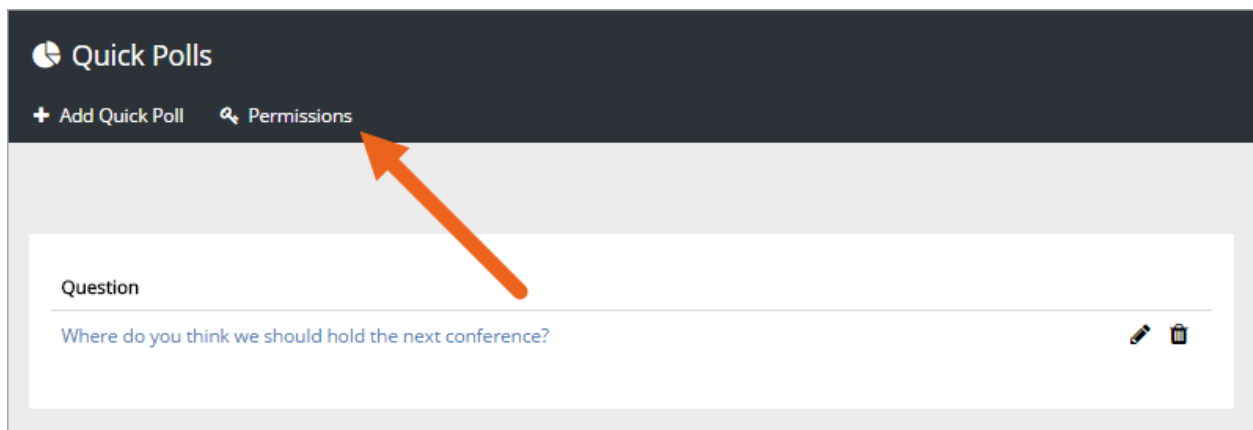
Edit or delete polls

Use the icons in the list to edit or delete a poll:



Adding Quick Polls administrators

If other colleagues should be able to create Quick Polls, you add them to the permissions list here:

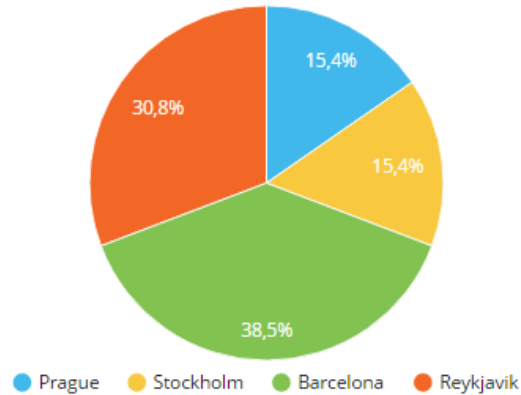


Quick Polls results

See a Quick Poll's results by clicking the link in the list. The result is shown this way:

✎ Where do you think we should hold the next conference?

Where do you think we should hold the next conference?



Number of votes: 13

The settings for the control

The following settings are available when the control has been added to a page:

Quick Polls Settings

Question

General

Targeting

Custom Colors

We have 3 optional colors for the kids helmets. Which one is your favourit

Orange

Yellow

Red

#17bce7

#eebc25

#179c17

Save

Close

The Question tab

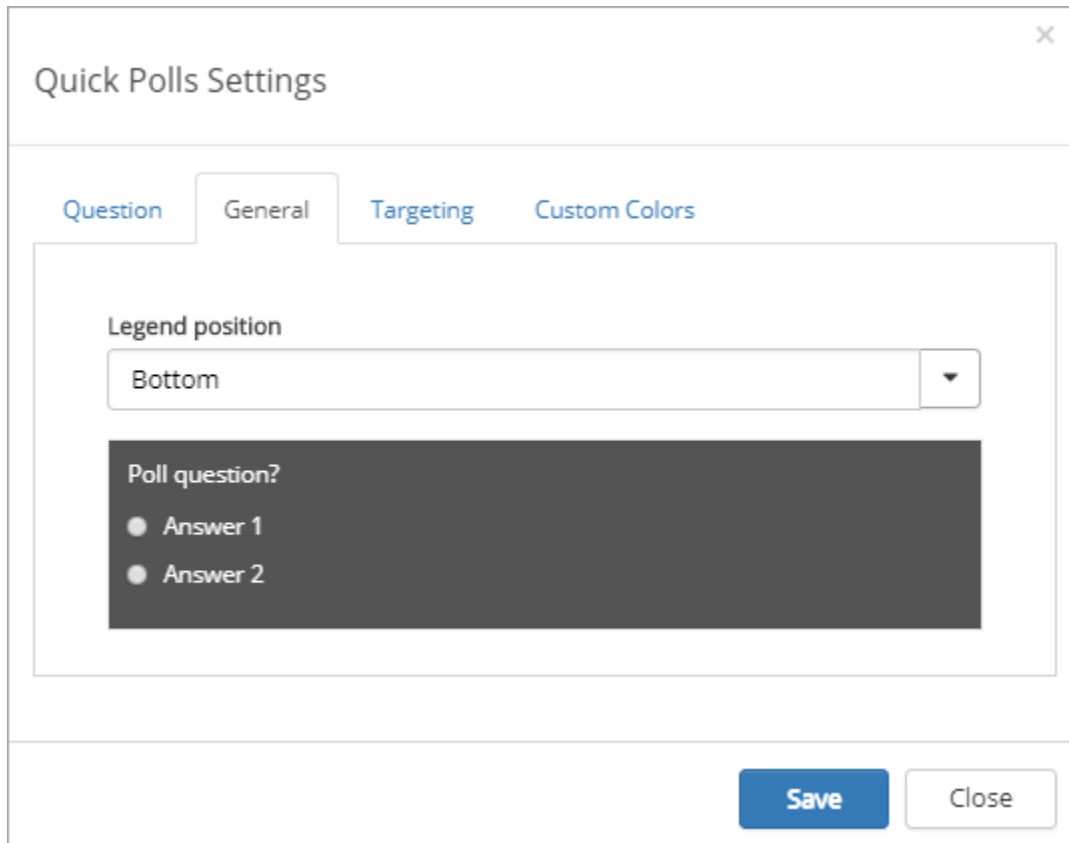
On this tab you select question.

- **Question:** Open the list and select which Quick Poll to display.
- **Display settings:** You should primarily set colors through Theme colors in Omnia Admin, but if needed you can set background color, link color and border color here or on the “Custom colors” tab.

The selected poll must be available (start date and time, and end date and time), If it's not available, the message “The selected poll is not active” is shown. You then have to select another poll, or have a talk with the administrator to change start- or end time for the poll you would like to display.

The General tab

On this tab you set the position for the explanation of the result (the Legend). You can also choose “None” to not display the explanation.



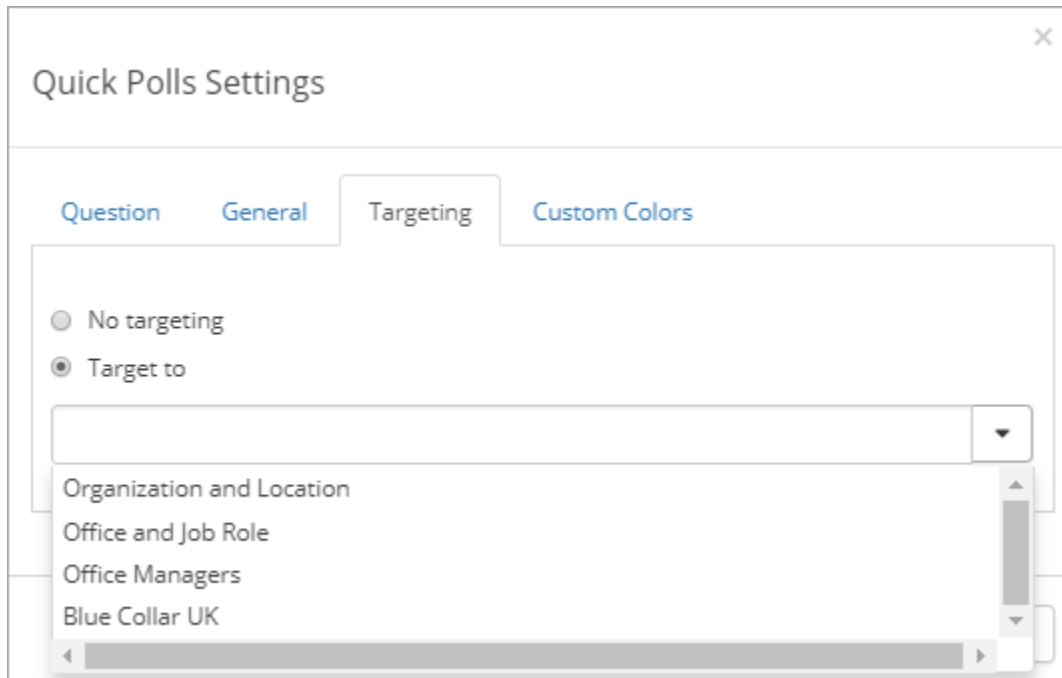
The screenshot shows a dialog box titled "Quick Polls Settings" with a close button (X) in the top right corner. Below the title bar are four tabs: "Question", "General", "Targeting", and "Custom Colors". The "General" tab is currently selected. Inside the "General" tab, there is a section labeled "Legend position" with a dropdown menu showing "Bottom". Below this is a dark gray rectangular area labeled "Poll question?" which contains two radio button options: "Answer 1" and "Answer 2". At the bottom right of the dialog box are two buttons: "Save" and "Close".

In the example above (Where do you think we should hold the next conference) the Legend is placed at the bottom.

The Targeting tab

If targeting is activated (in Omnia Admin), you can select to use targeting for this poll.

Select “Target to” and choose target group in the list.



The screenshot shows a 'Quick Polls Settings' dialog box with a close button (X) in the top right corner. It features four tabs: 'Question', 'General', 'Targeting' (which is the active tab), and 'Custom Colors'. Under the 'Targeting' tab, there are two radio button options: 'No targeting' and 'Target to'. The 'Target to' option is selected. Below these options is a dropdown menu that is currently open, displaying a list of targeting criteria: 'Organization and Location', 'Office and Job Role', 'Office Managers', and 'Blue Collar UK'. The dropdown menu has a scroll bar on the right side.

The Custom Colors tab

You should primarily set colors through Theme colors in Omnia Admin (System/Settings/Default colors). If you still would like custom colors for the control, you can set them using this tab.

Quick Polls Settings

Question General Targeting Custom Colors

Background Color
#545454

Link Color
#fff

Border Color
#e7e8ea

Save Close

RSS Reader

Setup RSS Reader

1. Go to Omnia Admin > Features.
2. Activate the tenant scoped feature “Omnia Intranet RSS Reader”.
3. The RSS Reader block is now available in quick pages.
4. If you want to add support for the RSS Reader legacy web part, activate the site collection scoped feature “Omnia Intranet RSS Reader Web Part”.

The tenant feature Omnia Intranet RSS Reader must be activated for the RSS Reader control to be available.

The Omnia RSS Reader is available as a web part for standard Sharepoint pages and as a block for Quick Pages.

Settings for the control

Here you can set the following:

RSS reader setting

General

Targeting

View type

Image on left

Source

Title

Page Size

5

☒ Open in New Window

Visible

px

Save

Close

The General tab

On this tab you can set the following:

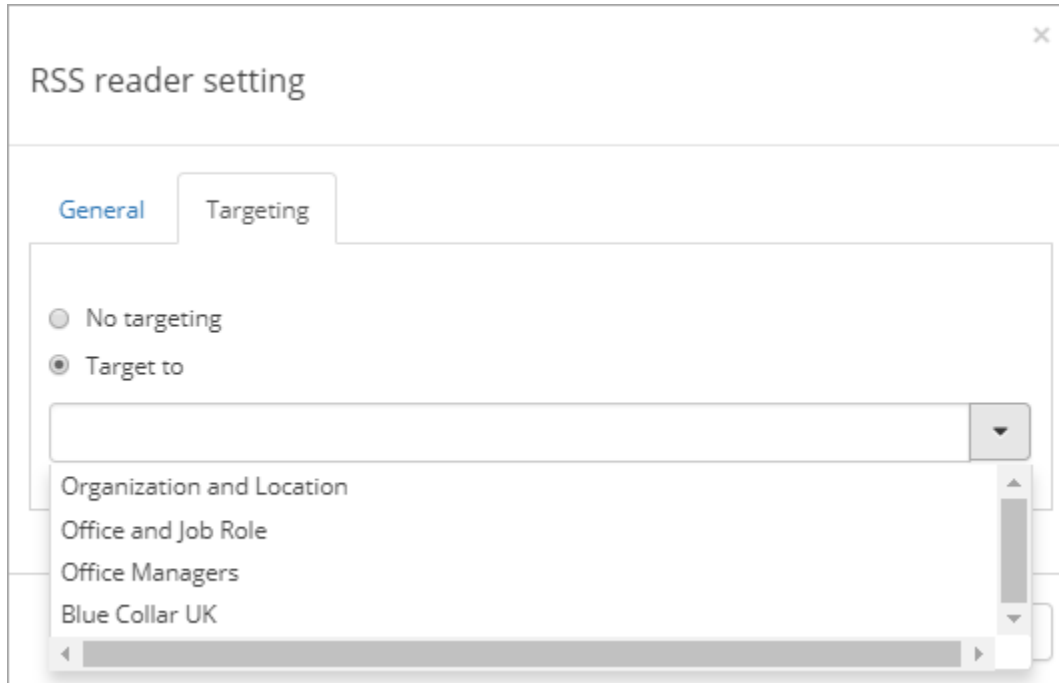
- **View type:** Select to show the list image to the left, image to the right or no image.
- **Source** Add the address to the RSS source here.
- **Title:** You can edit the heading shown for the list here.
- **Page Size:** Defines the number of objects to display per list “page”.

- **Open in New Window:** If the RSS postings always should be opened in a new window when clicked, select this option.
- **Visible:** Defines when the control should be visible: Always, up to a maximum width or to a minimum width. Then define maximum or minimum width in pixels.

The Targeting tab

If targeting is activated, you can select to use targeting for the RSS Reader.

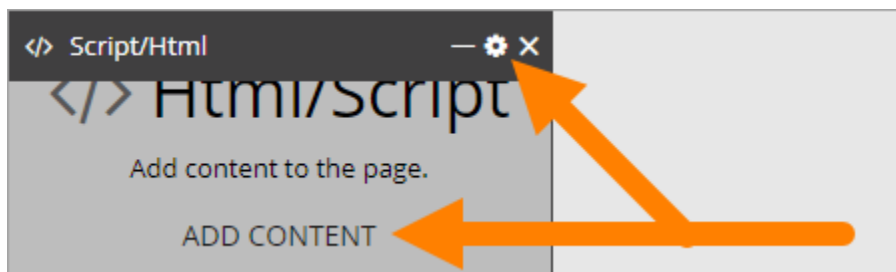
Select “Target to” and choose target group in the list.



Script/HTML

Script/HTML is a block you can use for various applications to add extra functionality or content to a page. One example is to add the code for a video, from YouTube, or some other source.

To add content (HTML) or edit the settings, you can either click the cogwheel or click “Add Content”.



The following is shown:

Html/Script Block Settings

CONTENT

SETTINGS

HTML

1

CSS

1

Javascript

1

SAVE

CANCEL

Use the designated areas for:

- **HTML:** Add HTML here.
- **CSS:** To set CSS for the content in this field, add it here.
- **Javascript:** If Javascript is needed/used, add it here.

The settings

The following settings are available for the block:

CONTENT
SETTINGS

Title overlay

The title is only displayed in edit mode for readability

☐ Hidden Block

☐ Run in iframe

☐ Run Script in Edit Mode

- **Title Overlay:** If a Title Overlay is needed, add it in this field. (Note the comment: “The title is only displayed in edit mode for readability”.)
- **Hidden block:** If the block for some reason should be hidden in reader mode (end user mode), select this option.
- **Run in iFrame:** If the HTML/Script you add here should be run in iFrame, select this option.
- **Run Script in Edit Mode:** If the script should be run in reader mode (end user mode) only, select this option.

Don't forget to save when you're done.

1.6 Document Management

1.6.1 Administrator

Settings

Under “Settings” in Omnia Admin, the following is available:

Display Format (Server or Client)

Set the date and time format that should be used in ODM. I needed, you can set different values for the server and clients respectively. If you're not certain what the result will be for a certain format, a preview is shown to the far right:

Display Format (Server)

Name	Value	
Server Date Format	<input type="text" value="yyyy-MM-dd"/>	2018-01-02
Server Time Format	<input type="text" value="HH:mm:ss"/>	08:31:09

Save

Display Format (Client)

Name	Value	
Client Date Format	<input type="text" value="YYYY-MM-DD"/>	2018-01-02
Client Time Format	<input type="text" value="HH:mm:ss"/>	08:31:09

Save

Document Format

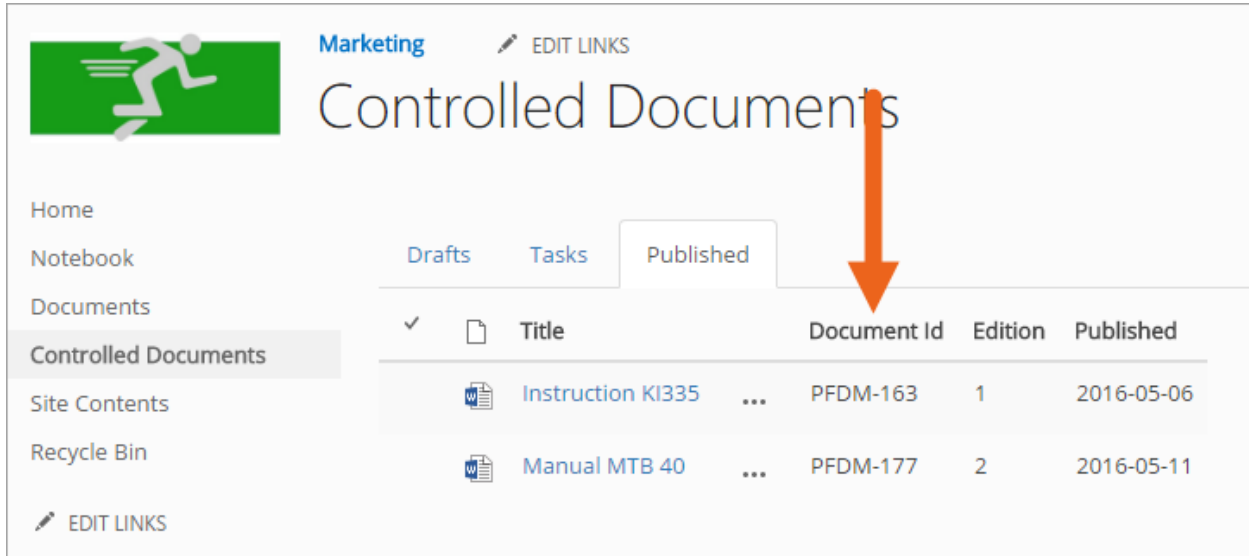
Here you set the prefix for the Document id for this tenant.


Document Format

Name	Value
Document Prefix	<input type="text" value="PFDM"/>


Save

When a new controlled document is published the first time, a document id is set for the document, based on the prefix from the settings. This document id is then the same in all future editions of the document and is an important part of tracking published editions of the document.






Marketing  EDIT LINKS

Controlled Documents

Home
Notebook
Documents
Controlled Documents
Site Contents
Recycle Bin
 EDIT LINKS

Drafts Tasks **Published**


✓		Title		Document Id	Edition	Published
		Instruction KI335	...	PFDM-163	1	2016-05-06
		Manual MTB 40	...	PFDM-177	2	2016-05-11

Search Configurations

Here you set the review date property name for this tenant.

Search Configurations

Name	Value
Review Date Property Name	<input type="text" value="RefinableDate12"/>




PDF Conversion Configurations

Here you can set a number of options that may be needed for PDF conversions.

PDF Conversion Configurations

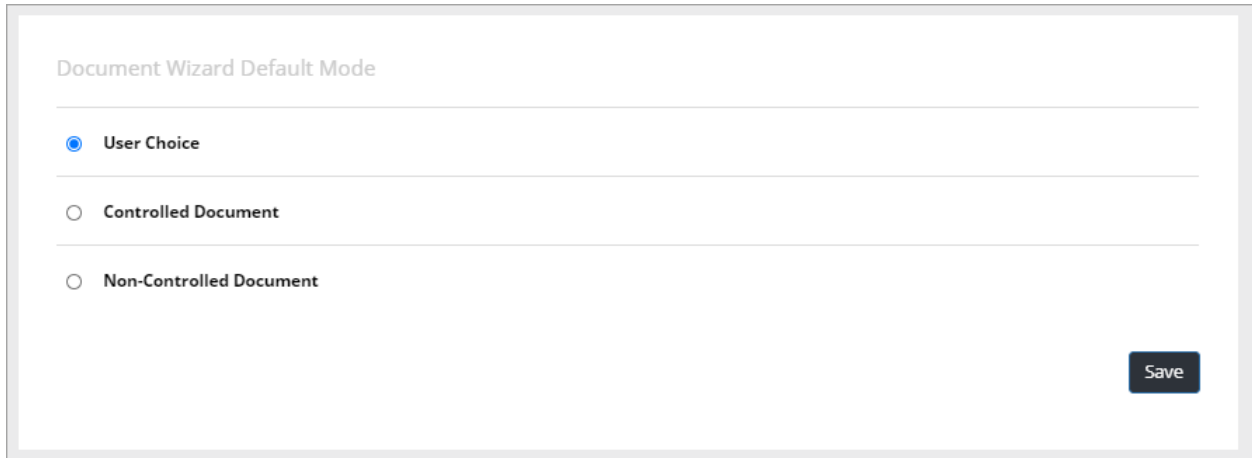
PDF Conversion Method	<input type="text" value="Office Web Access"/>
Retry Times When Failed	<input type="text" value="3"/>



First select the conversion method to see the settings for the method.

Document Wizard Default Mode

Use these settings to decide what should be available in the Create New Document Wizard.

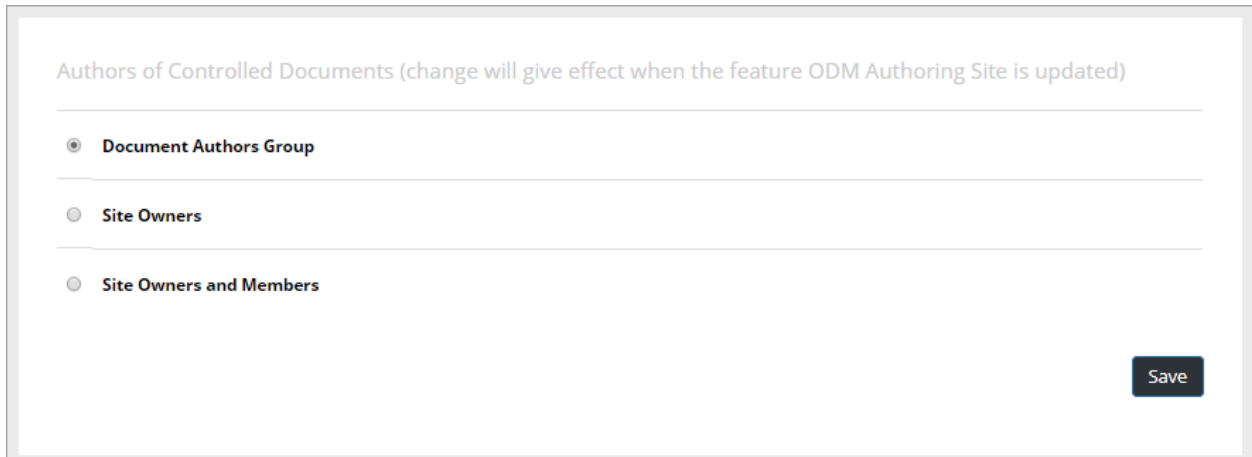


The screenshot shows a settings page titled "Document Wizard Default Mode". It contains three radio button options: "User Choice" (which is selected), "Controlled Document", and "Non-Controlled Document". A "Save" button is located in the bottom right corner of the form area.

- **User Choice:** Creation of both “normal” documents and Controlled Documents are available.
- **Controlled Document:** If the wizard should be used to create Controlled Documents only, select this option.
- **Non-Controlled Document:** If the wizard should be used to create “normal” documents only, select this option.

Authors of Controlled Documents

Here you can set the type of permissions to be used in Controlled Documents libraries in the tenant.



The screenshot shows a settings page titled "Authors of Controlled Documents (change will give effect when the feature ODM Authoring Site is updated)". It contains three radio button options: "Document Authors Group" (which is selected), "Site Owners", and "Site Owners and Members". A "Save" button is located in the bottom right corner of the form area.

- **Document Authors Group:** This is the default setting. A specific permission group will be used for authors.
- **Site Owners:** All site owners will have permissions to work with Controlled Documents. No specific permission group for authors is needed.
- **Site Owners and Members:** All site owners and all Members will have permissions to work with Controlled Documents. No specific permission group for authors is needed.

Note! This setting is not activated right away. It’s activated when the feature “Omnia Document Management Authoring Site” is either activated or updated for a site.

Approvers Group

If this option is selected a specific permission group will be created for approvers in every Team Site with a Controlled Documents library. Note that this should normally be selected. Not using permission groups is for specialized implementation only. Also note that you can still set what type of approval to use for each Document Type.

Approvers Group

☒ **Use Site Approvers Group**

Localization ▼

Name

Save

Retention Manager

A Retention Policy can be activated by adding a name of a Retention Manager here.

Retention Manager

Save

When a Retention Manager is set up, a new tab will be available for Document Types, where a Retention Policy can be added:

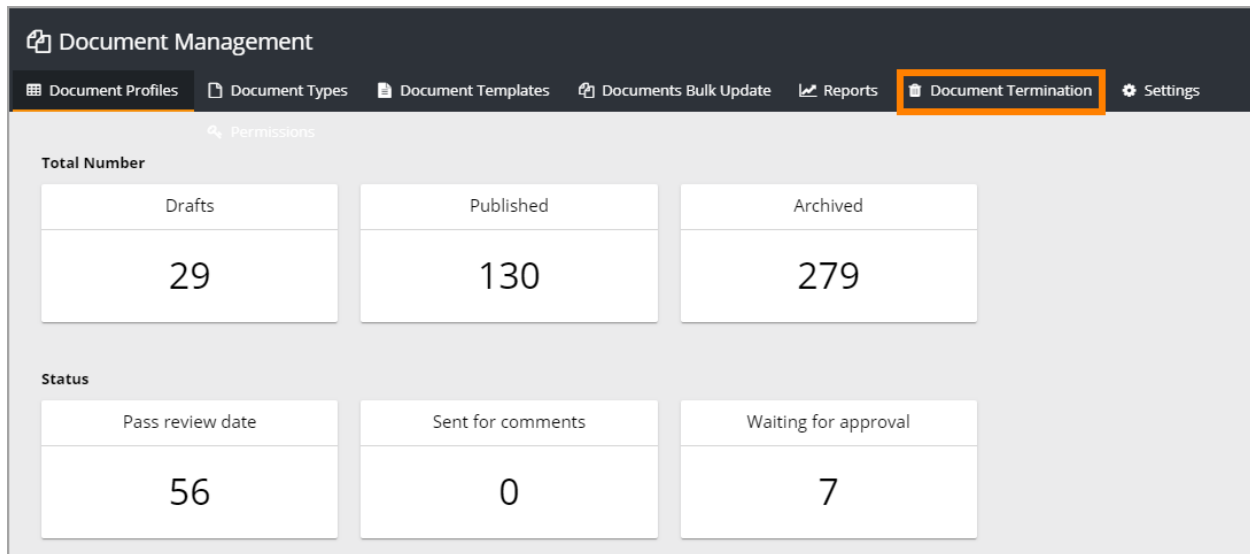
General Publish Review Archive Retention

☒ **Limit Retention**

☒ **Calculated** ▼ + **years**

☐ **Specific Date**

A new tab is also added for Document Management - Document Termination - where all documents with expired Retention will be listed:



Document Profiles

Here you can set up as many document profiles as you need, in the different languages you're using. A document profile has a specific set of properties, and has one or more defined document layouts. If you just have need of one, edit the name, set properties and select layout for the default document profile.

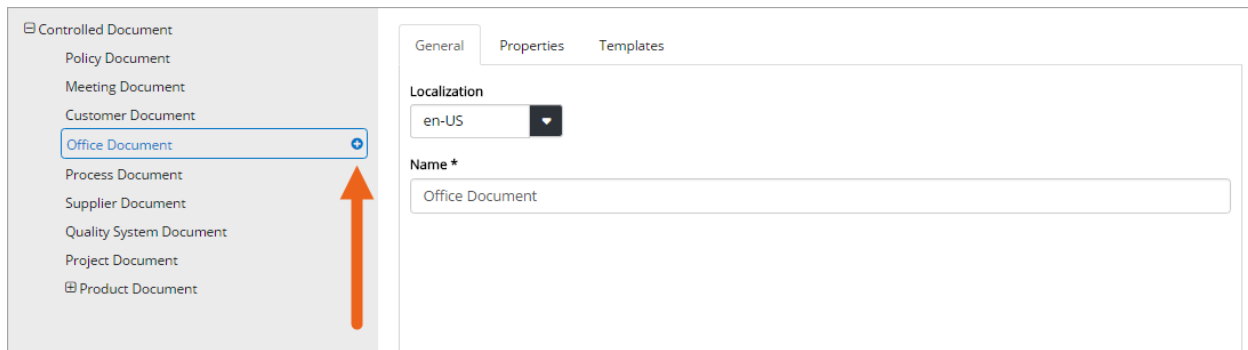
Document profiles are used for Document Types. You select one Document Profile for each Document Type and select which Document Layout to use, from the list defined for the Document Profile.

Note! Document profiles inherit properties from it's "parents", but you can change status for the properties on a specific profile when needed. Therefore it can be a good idea to set up all properties that most of the profiles will share, at the top level. For a Document Profile that will not use a certain property, you can set that property to hidden there. A property can even be hidden at the top level, and shown on other levels. The same is true if you have many Document Profiles and work with groups of profiles, you can set all properties the group will share on the group's top level.

1. To create a new Document Profile, click the plus.

The screenshot shows the 'Controlled Document' profile creation form. On the left, there is a list of document types: 'Policy Document', 'Meeting Document', 'Customer Document', 'Office Document', 'Process Document', 'Supplier Document', 'Quality System Document', 'Project Document', and 'Product Document'. An orange arrow points to the 'Controlled Document' profile. On the right, there is a form with three tabs: 'General', 'Properties', and 'Templates'. The 'General' tab is active, showing a 'Localization' dropdown set to 'en-US' and a 'Name *' field containing 'Controlled Document'.

You can even group Document Profiles.



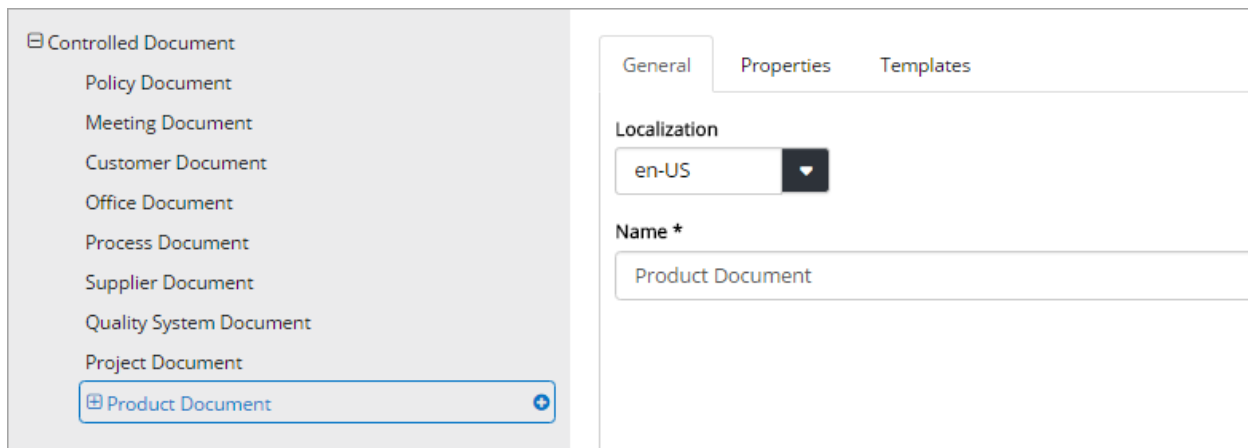
1. To create a sub profile, select the profile and click the plus.

Settings for Document Profiles

The settings are organized in three tabs, see the sections below.

The General tab

Enter or edit the name here. The name is displayed when selecting Document profile for a Document Type. If you are using several languages, the name can be set in each language. Save the name before entering another tab.



The Properties tab

Properties are inherited, from the top settings (“Controlled Documents”) and, if you are grouping Document profiles, sub profiles inherit from it’s “mother”, the top group profile.

You can set status for an inherited property on each profile as needed, see below. You can still add properties to any Document Profile as well. With other words, a Document Profile can have a number of inherited properties and a number of specific properties. Therefore it can be a good idea to start by adding the common properties to the top level.

Note! Properties can be hidden at top level but still displayed on some other level.

Adding common properties

If there will be properties you will use on most of the profiles, a good idea is to add them to the top level. You can change status for an inherited property on each profile, see below.

1. Select the top level, and then select the “Properties” tab.
2. Add new properties as described below and set a general, suitable status (remember that status can be changed for each profiler, if needed).

If you are working with profile groups, each group will inherit the properties from the top level, and you can add properties that is common for most of the profiles in the group. The sub profiles in the groupe will then inherit the group properties, as well as the top level properties.

To add, or edit, properties common for the group do the following when you have created the group:

1. Select the group.
2. Change status for top level properties, for the group’s profiles, if needed.
3. Add additional properties that will be inherited within the group.

Adding a property

On the Property tab you define the properties fields to be used for this Document Profile. You do it the same way either you add a property that will be inherited, or you add a specific property to a Document Profile.

1. To add a new property, click the link.

General
Properties
Templates

Property	Source	Inherit Status	Required (on publishing)	Visibility	Default Value
Organization	Controlled Document		<input type="checkbox"/>	Hidden	
Document Owner	Controlled Document		<input checked="" type="checkbox"/>	Visible	
Applies To	Controlled Document		<input type="checkbox"/>	Hidden	
Office	Controlled Document		<input type="checkbox"/>	Visible	
Product Family	Controlled Document		<input type="checkbox"/>	Hidden	
Product	Controlled Document		<input type="checkbox"/>	Hidden	
Market Region	Controlled Document		<input type="checkbox"/>	Hidden	
Market Country	Controlled Document		<input type="checkbox"/>	Hidden	
Project	Controlled Document		<input type="checkbox"/>	Hidden	
Agreement Renewal	Controlled Document		<input type="checkbox"/>	Hidden	
Add new property					

2. Set the following:

Localization

en-US

Type

Title

Internal Name

odmp_

Placeholder Shortname

Default Value

☒ Static Value
☐ From Site Property

Save

Cancel

Use the fields the following way:

- **Type:** Select type of field. If you select Managed Metadata, additional fields are displayed, see below.
- **Title:** Title for the property, displayed for authors (and can be displayed for end users), and therefore very important that it is easy to understand.
- **Internal name:** Add a field name to use when the property is used as a field in a prepared Layout document.
- **Placeholder shortname:** As the internal name sometimes can be long, here you can enter a shorter name, more convenient to use in Word templates.
- **Allow multiple selections:** Some fields, for example Person, can in some cases have more than one value. If that is the case for the property you are adding, select this option. (If the option is not applicable, it's not shown.)
- **Default Value:** Setting a Default Value is always optional. See it as a way to help authors to set correct values. You can set either a fixed value or set that the value from one of the site properties should be used. If it should happen that no data is available in some instances, no default value will then be set.

When you select “Managed Metadata” as Type, additional options are displayed:

Localization

en-US ▼


Type: Managed Metadata ▼

Title:


Internal Name: odmp_

Placeholder Shortname:

Allow multiple selections: ☐

Term Set: 

[Create New Term Set](#)


Default Value: ☒ Fixed Value 

☐ From Site Property

Save Cancel

- **Term set:** If a suitable term set exists, select it.
- **Create new term set:** If no suitable term set exists, click the link to create a new term set.

If the term set has more than one level, for example country-city-office you can select which level to start on and also limit number of levels shown.

Term Set 

[Edit terms](#)




Start level ☒ Limit no of levels to show

[Save](#) [Cancel](#)

With this options you can make certain that for example only the cities in a chosen country can be selected, or only the offices in a chosen city can be selected, because only that part of the term set will be available.

Inherit Status and Status

In the list of properties for a Document Profile, you can see which properties are inherited and which properties have been added “locally”. An inherited property has a check box, either checked or not checked. If the status is the same as the “mother” the box is checked, if the status is altered, the box is not checked. In the column “Status” you can see actual property status for both inherited and locally added properties.

General Properties Templates				
Property	Source		Inherit Status	Status
Document Owner	Controlled Document		<input checked="" type="checkbox"/>	Required (on publishing)
Office	Controlled Document		<input type="checkbox"/>	Required (on publishing)
Supplier	Supplier Document			Required (on publishing)
+ Add new property				

In the above example the property “Document Owner” is inherited and has the same status as the mother. “Office” is also inherited but the status is changed. “Supplier” is a locally added property.

Setting property status

When you add a property on the top level (“Controlled Document”) you set a default status for the property. The profiles that inherit the property can set another status, applied for that profile only, if needed.

Note! If you change status for an inherited property for a group, all new profiles you create in that group, will inherit the group status, not the top level status. You can still change property status for a sub profile, if needed.

Property status can be:

- **Optional:** The editor can set this property when needed, but it can also be empty.
- **Required (on publishing):** The property must be set for the author to be able to publish the document.
- **Hidden:** The property is not shown on this profile (and thus not on any document of a Document Type that uses this Document Profile). This option is set for example when an inherited property should not be used.

To set status for a property, do the following:

1. Click the pen symbol.

General Properties **Templates**

Property	Source		Inherit Status	Status
Document Owner	Controlled Document		<input checked="" type="checkbox"/>	Required (on publishing)
Office	Controlled Document		<input type="checkbox"/>	Required (on publishing)
Supplier	Supplier Document			Required (on publishing)

Add new property

2. Select status from the list.

General Properties **Templates**

Property	Source		Inherit Status	Status
Document Owner	Controlled Document		<input checked="" type="checkbox"/>	Required (on publishing)
Office	Controlled Document		<input checked="" type="checkbox"/>	Optional
Customer	Customer Document			<div> Required (on publishing) </div> <div> Optional </div> <div> Required (on publishing) </div> <div> Hidden </div>

Add new property

3. Click the disc symbol to save the changes.

General Properties **Templates**

Property	Source		Inherit Status	Status
Document Owner	Controlled Document		<input checked="" type="checkbox"/>	Required (on publishing)
Office	Controlled Document		<input checked="" type="checkbox"/>	Optional
Customer	Customer Document			Optional




Add new property


To not save the changes, click the x.

Changing status for an **inherited property** is just slightly different.

1. Click the pen symbol.





General Properties **Templates**

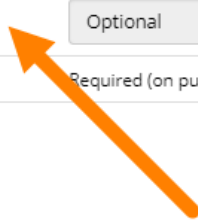
Property	Source		Inherit Status	Status
Document Owner	Controlled Document		<input checked="" type="checkbox"/>	Required (on publishing)
Office	Controlled Document		<input checked="" type="checkbox"/>	Optional
Customer	Customer Document			Required (on publishing)
+ Add new property				



2. Click the Inherited Status symbol to uncheck it.





General Properties **Templates**

Property	Source		Inherit Status	Status
Document Owner	Controlled Document		<input checked="" type="checkbox"/>	Required (on publishing)
Office	Controlled Document	 	<input checked="" type="checkbox"/>	Optional
Customer	Customer Document			Required (on publishing)
+ Add new property				

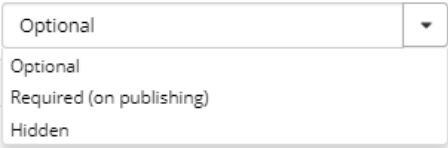


3. Select status from the list.

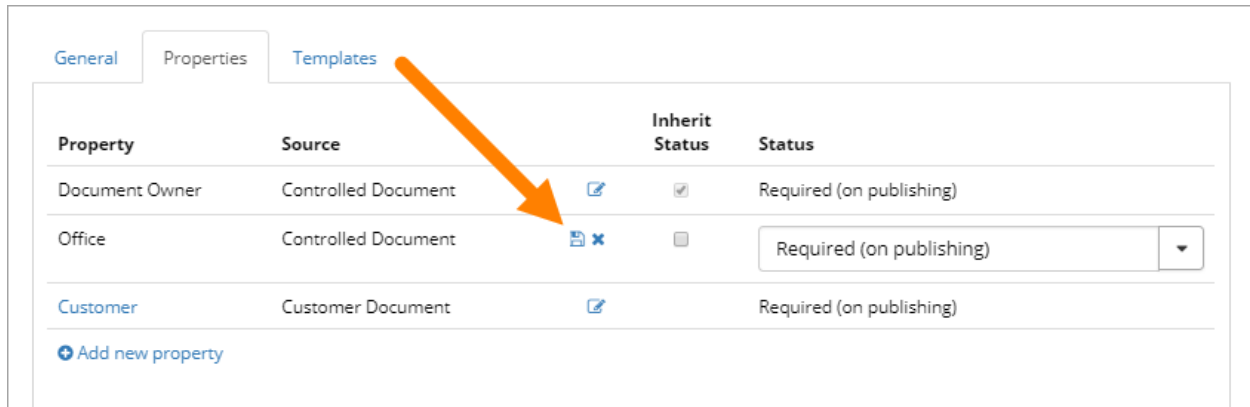
General Properties **Templates**

Property	Source		Inherit Status	Status
Document Owner	Controlled Document		<input checked="" type="checkbox"/>	Required (on publishing)
Office	Controlled Document	 	<input type="checkbox"/>	Optional
Customer	Customer Document			Optional
+ Add new property				

Optional
Required (on publishing)
Hidden



4. Click the disc symbol to save the changes.



Property	Source	Inherit Status	Status
Document Owner	Controlled Document		Required (on publishing)
Office	Controlled Document		Required (on publishing)
Customer	Customer Document		Required (on publishing)

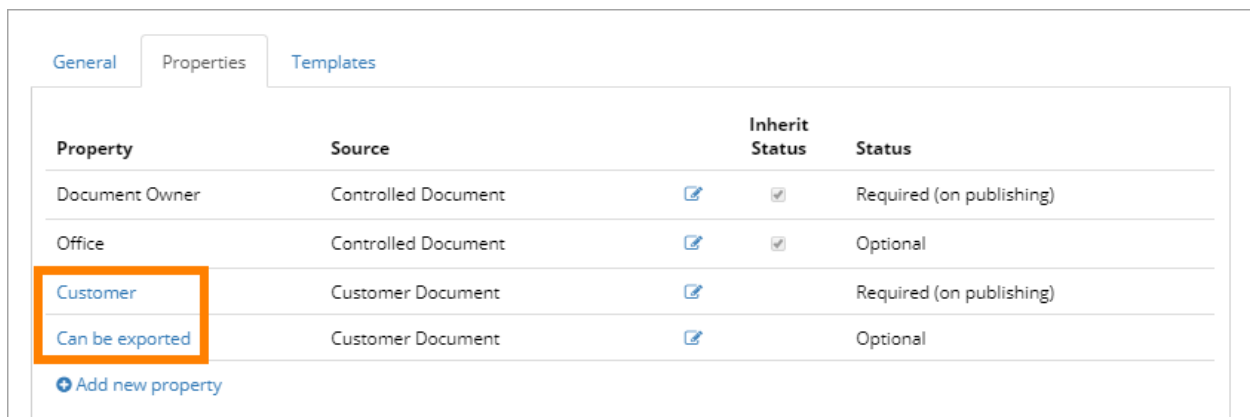
[+ Add new property](#)

To not save the changes, click the x.

Edit or delete property

To edit a property, do the following:

1. Click the link.



Property	Source	Inherit Status	Status
Document Owner	Controlled Document		Required (on publishing)
Office	Controlled Document		Optional
Customer	Customer Document		Required (on publishing)
Can be exported	Customer Document		Optional





[+ Add new property](#)

2. Make the changes.
3. Save.

NOTE! An inherited property can only be edited where it was added (at “mother”).

To delete a property, do the following:

1. Click the link.

General Properties				
Property	Source		Inherit Status	Status
Document Owner	Controlled Document		<input checked="" type="checkbox"/>	Required (on publishing)
Office	Controlled Document		<input checked="" type="checkbox"/>	Optional
Customer	Customer Document			Required (on publishing)
Can be exported	Customer Document			Optional
+ Add new property				

2. Click “Delete”.

Localization

en-US

Type

Yes/No

Title

Can be exported

Internal Name

odmp_can_x002d_be_x002d_exported

Placeholder Shortname

can-be-exported

Delete

Save

Cancel

NOTE! An inherited property can only be deleted where it was added (at “mother”). For an inherited property to not be used on a profile, set status to “Hidden”.

Required (on Publishing)












You can set that certain properties are mandatory for publishing. If these properties are not filled in, publishing is simply not possible. A property must be visible (see below) for this setting to be edited.

1. To edit the setting, click the edit icon.









General

Properties

Templates

Property	Source	Inherit Status	Required (on publishing)	Visibility	Default Value
Organization	Controlled Document		<input type="checkbox"/>	Hidden	
Document Owner	Controlled Document		<input checked="" type="checkbox"/>	Visible	
Applies To	Controlled Document		<input type="checkbox"/>	Hidden	
Office	Controlled Document		<input type="checkbox"/>	Visible	
Product Family	Controlled Document		<input type="checkbox"/>	Hidden	
Product	Controlled Document		<input type="checkbox"/>	Hidden	
Market Region	Controlled Document		<input type="checkbox"/>	Hidden	
Market Country	Controlled Document		<input type="checkbox"/>	Hidden	
Project	Controlled Document		<input type="checkbox"/>	Hidden	
Agreement Renewal	Controlled Document		<input type="checkbox"/>	Hidden	
 Add new property					

2. Then select or deselect Required.

General Properties						
Property	Source	Inherit Status	Required (on publishing)	Visibility	Default Value	
Organization	Controlled Document		<input type="checkbox"/>	Hidden		
Document Owner	Controlled Document		<input checked="" type="checkbox"/>	Visible		
Applies To	Controlled Document		<input type="checkbox"/>	Hidden		
Office	Controlled Document	 	<input type="checkbox"/>	<input type="text" value="Visible"/> 	<input checked="" type="radio"/> Fixed Value <div> <input type="text"/>  </div>	
					<input type="radio"/> From Site Property	
Product Family	Controlled Document		<input type="checkbox"/>	Hidden		

Visibility












Use this setting to decide when properties should be visible for editing.

1. To edit the setting, click the edit icon.

General

Properties

Templates

Property	Source	Inherit Status	Required (on publishing)	Visibility	Default Value
Organization	Controlled Document		<input type="checkbox"/>	Hidden	
Document Owner	Controlled Document		<input checked="" type="checkbox"/>	Visible	
Applies To	Controlled Document		<input type="checkbox"/>	Hidden	
Office	Controlled Document		<input type="checkbox"/>	Visible	
Product Family	Controlled Document		<input type="checkbox"/>	Hidden	
Product	Controlled Document		<input type="checkbox"/>	Hidden	
Market Region	Controlled Document		<input type="checkbox"/>	Hidden	
Market Country	Controlled Document		<input type="checkbox"/>	Hidden	
Project	Controlled Document		<input type="checkbox"/>	Hidden	
Agreement Renewal	Controlled Document		<input type="checkbox"/>	Hidden	
 Add new property					

2. For Visible, you can set the following:

Property	Source	Inherit Status	Required (on publishing)	Visibility	Default Value
Organization	Controlled Document		<input type="checkbox"/>	Hidden	
Document Owner	Controlled Document		<input checked="" type="checkbox"/>	Visible	
Applies To	Controlled Document		<input type="checkbox"/>	Hidden	
Office	Controlled Document		<input type="checkbox"/>	<div> <div>Visible</div> <div>Visible</div> <div>Hidden in new form</div> <div>Hidden</div> </div>	<input checked="" type="radio"/> Fixed Value <input type="text"/> <input type="radio"/> From Site Property
Product Family	Controlled Document		<input type="checkbox"/>	Hidden	

- **Visible:** The property is available in the Create New Document Wizard and for editing in the Controlled Documents library.
- **Hidden in new form:** The property is not available in the Create New Document Wizard, but is available for editing in the Controlled Documents library.
- **Hidden:** The property is not available for editing, neither in the Wizard nor in the Controlled Documents library.

The Templates tab

A Template is a prepared document that an author can use as a starting point when creating a document of a certain type. A Template Document can contain as much content as is applicable. Regarding Microsoft Word Document Templates, the prepared document will normally contain a set heading and in some cases a set footer, with fields that can be populated with data when the document is published.

There can be one or more templates defined for a Document Profile. Here's an example:

Controlled Document

Policy Document
Meeting Document
Customer Document
Office Document
Process Document
Supplier Document
Quality System Document
Project Document

Product Document

General Properties Templates

Language

English

Name

MX Product Manual
 Product Handbook Template

Add new template

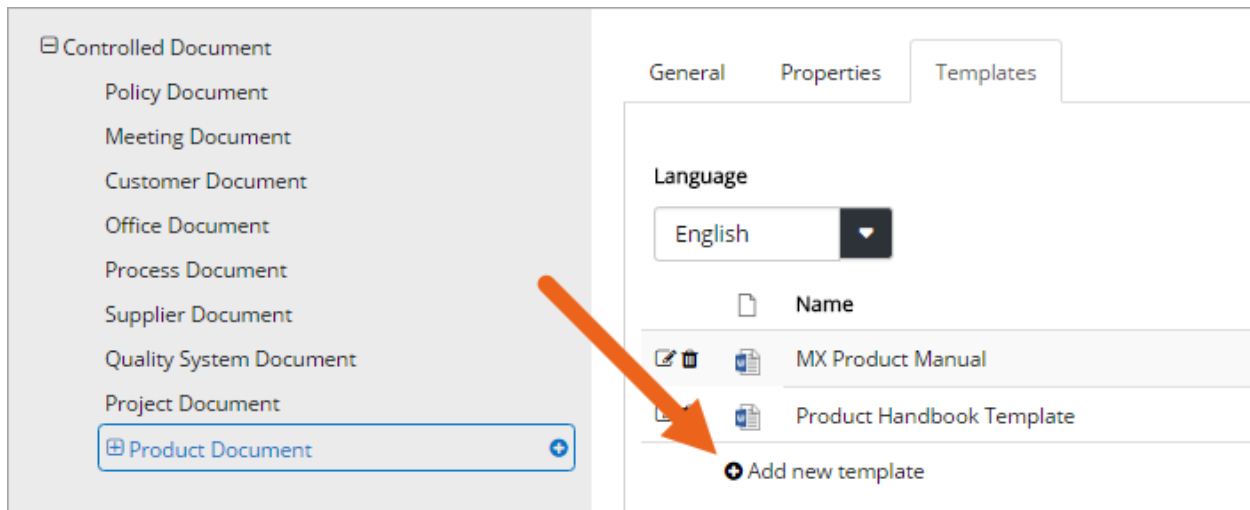
To see a list of templates for another of the languages you use, select the language in the list.

Note! This tab and the “Document templates” setting are connected. Changes you make here for Controlled Documents Templates are reflected in “Document Templates” and vice versa.

Adding a new template

Do the following:

1. Click “Add new template”.



You can either link to an existing, published controlled document, or prepare and upload a new document, to use as a template.

Link to Document

To link to a document:

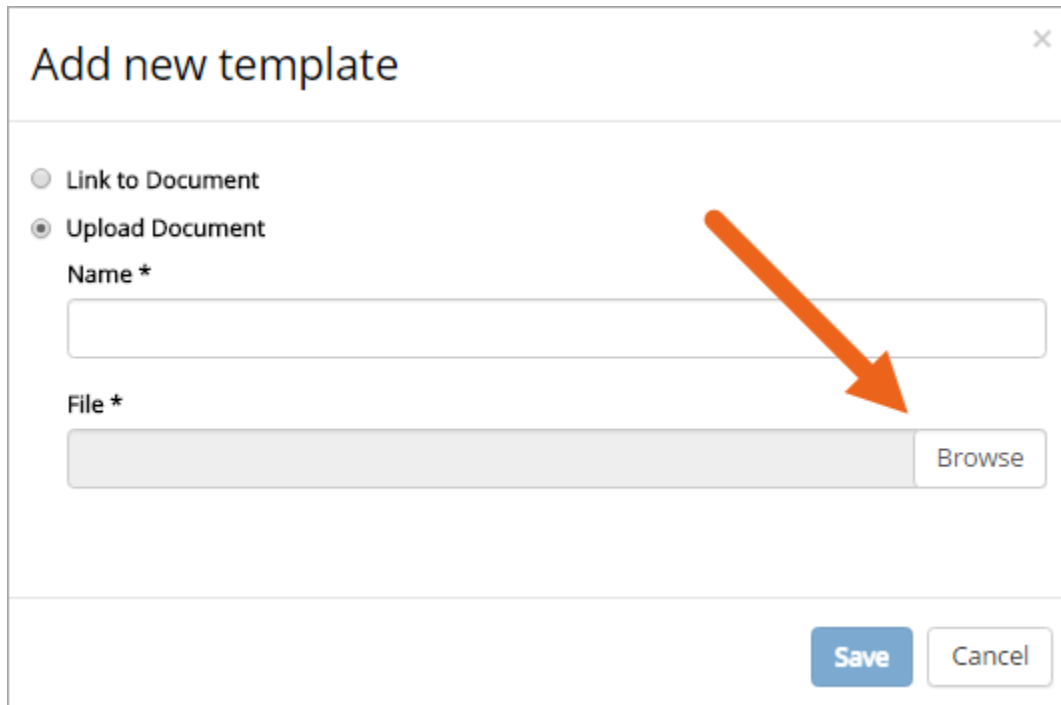
1. Enter the document-id and click “Find”.
2. When you have found the document, click “Save”.

Note: When a new edition of the linked document is published, the template is automatically updated. When an editor creates a new document based on document type with a linked document as template, the latest edition is always used. Existing, published documents are not changed.

Upload document

To upload a document to use as a template:

1. Select “Upload Document”.
2. Set a name. This name is displayed for the author, so make sure it’s really understandable.
3. Click “Browse” to find the document on your computer and select it.

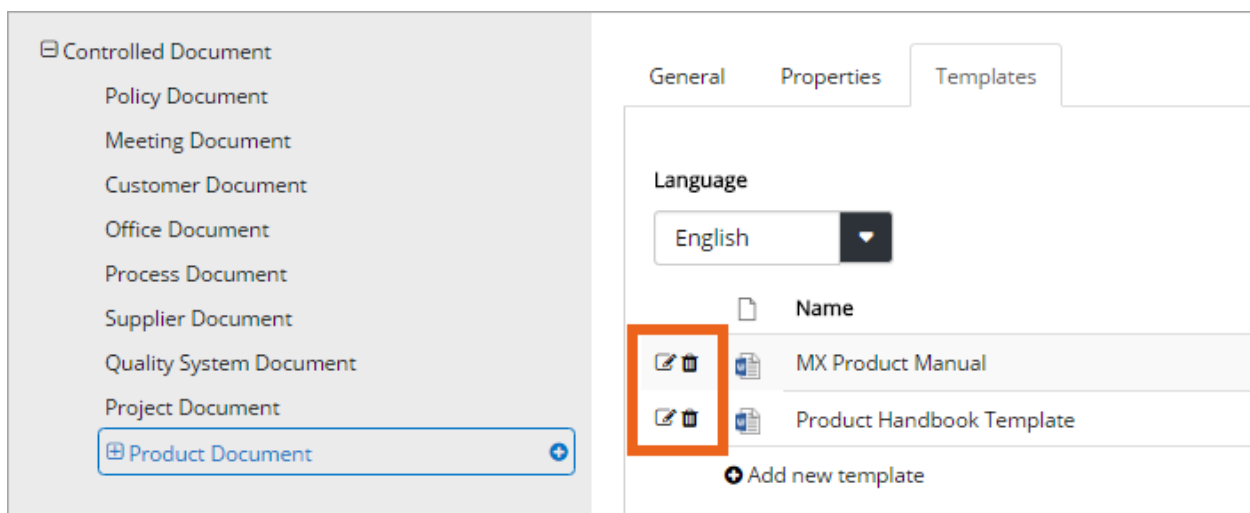


The dialog box titled "Add new template" has a close button (X) in the top right corner. It contains two radio buttons: "Link to Document" and "Upload Document", with "Upload Document" selected. Below these are two required fields: "Name *" and "File *". The "File *" field is a text input with a "Browse" button to its right. An orange arrow points from the top right towards the "Browse" button. At the bottom right are "Save" and "Cancel" buttons.





4. Click "Save".

Editing and removing templates

To edit or remove a template, use the icons:



The interface shows a list of document types on the left: Controlled Document, Policy Document, Meeting Document, Customer Document, Office Document, Process Document, Supplier Document, Quality System Document, Project Document, and Product Document (highlighted with a blue border and a plus icon). On the right, the "Templates" tab is active. It shows a "Language" dropdown set to "English". Below is a table of templates:

	Name
 	MX Product Manual
 	Product Handbook Template

Below the table is a button with a plus icon and the text "Add new template". A red box highlights the edit and delete icons for the first two templates.

Tip! When editing a template you can "update" by uploading another, updated file, but still use the same template name.

×

Edit template

☐ Link to Document
 ☒ Upload Document


Name *

File *

Browse

Save

Cancel



































Document Templates

Management of Document Templates is handled here. The templates can be available for Omnia Document Management only or as general templates as well.

Note! This list and the list on the “Templates” tab under “Document profiles” are connected. Changes you make here for Controlled Documents templates are reflected in the list on the “Templates” tab and vice versa.

The list of available templates can look like this:

Language				
<div>English ▼</div>				
	Template Name	Scope	Document Profile	Categories
  	 Adventrix Presentation Template			<ul style="list-style-type: none"> General Templates
  	 X MAI Documentation		Handbook Document	<ul style="list-style-type: none"> Product Templates General Templates
  	 TEST 2019		Controlled Document	
  	 Word		Controlled Document	
  	 Adventrix Word Template	Controlled Documents Only	Controlled Document	
  	 Business Plan Template			<ul style="list-style-type: none"> General Templates
  	 Adventrix Product Presentation			<ul style="list-style-type: none"> Product Templates
  	 Excel			

Use the icons to the left to (from left to right): edit the template, delete the template or download a copy of the template.

- **Language:** Select language for a list of templates in that language.

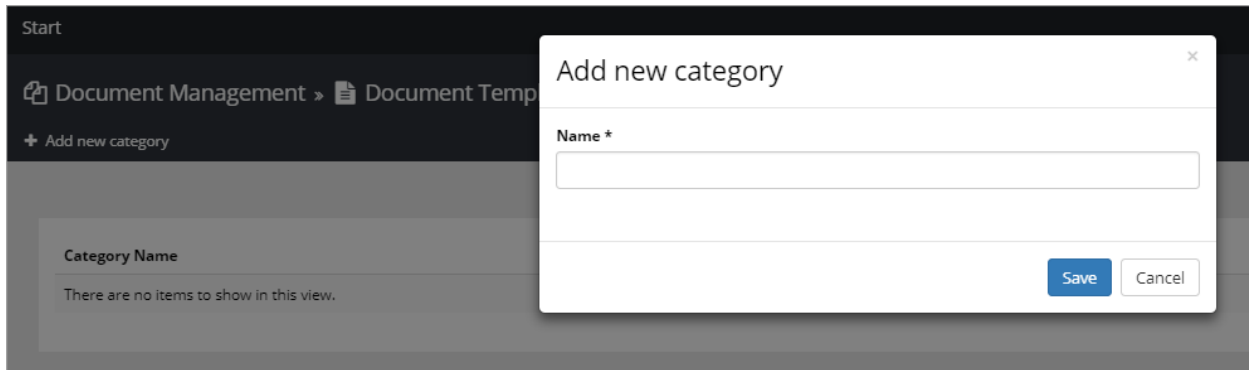
- **(Symbol):** This column indicates the file type.
- **Template Name:** Name of the template.
- **Scope:** In this column you can see if the template is applicable for Controlled Documents Only, or for general documents as well (in this case the field is empty). + **Document Profile:** States which Document Profile the template is connected to. You can go to the settings for the Document Profile by clicking the link.
- **Categories:** States category set for the template, if any.

Tip! When editing a template you can “update” by uploading another, updated file, but still use the same template name and other settings.

Using Categories

If there are many templates you can use Categories to group them. It’s most likely more useful for templates that will be used for general, non-controlled documents.

The first step is to create the Categories you will use (you can of course add more Categories later) and then add Categories when adding or editing templates. Using Categories is never mandatory, and even if you use them, some templates can still have no Category. On the other hand, a template can belong to more than one Category.

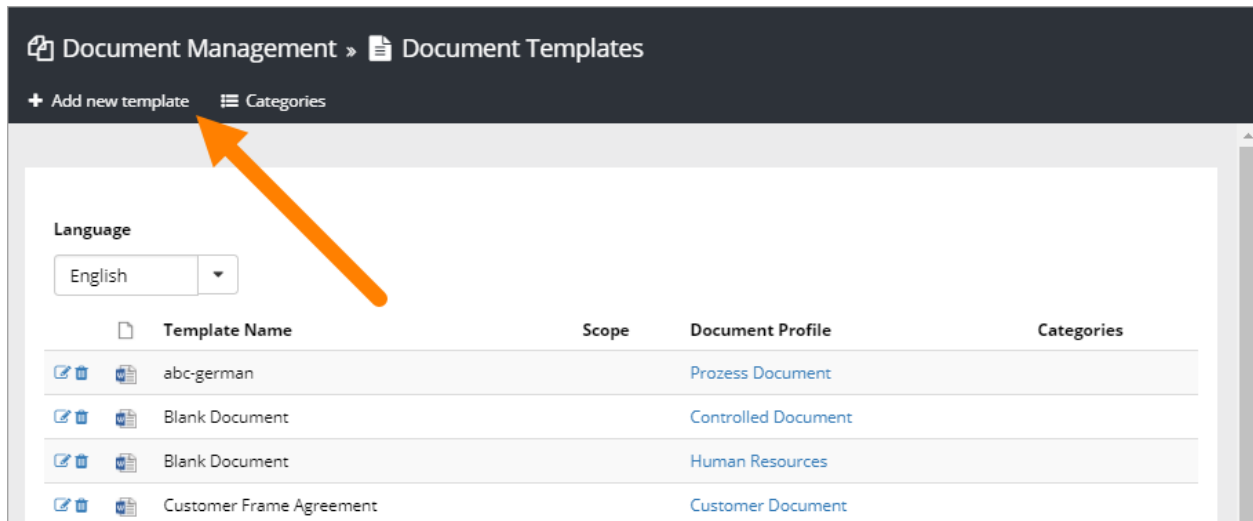


If Categories are used, users will see them as “folders” in the Document Wizard.

Adding a new template

Do the following:

1. Click “Add new template”.



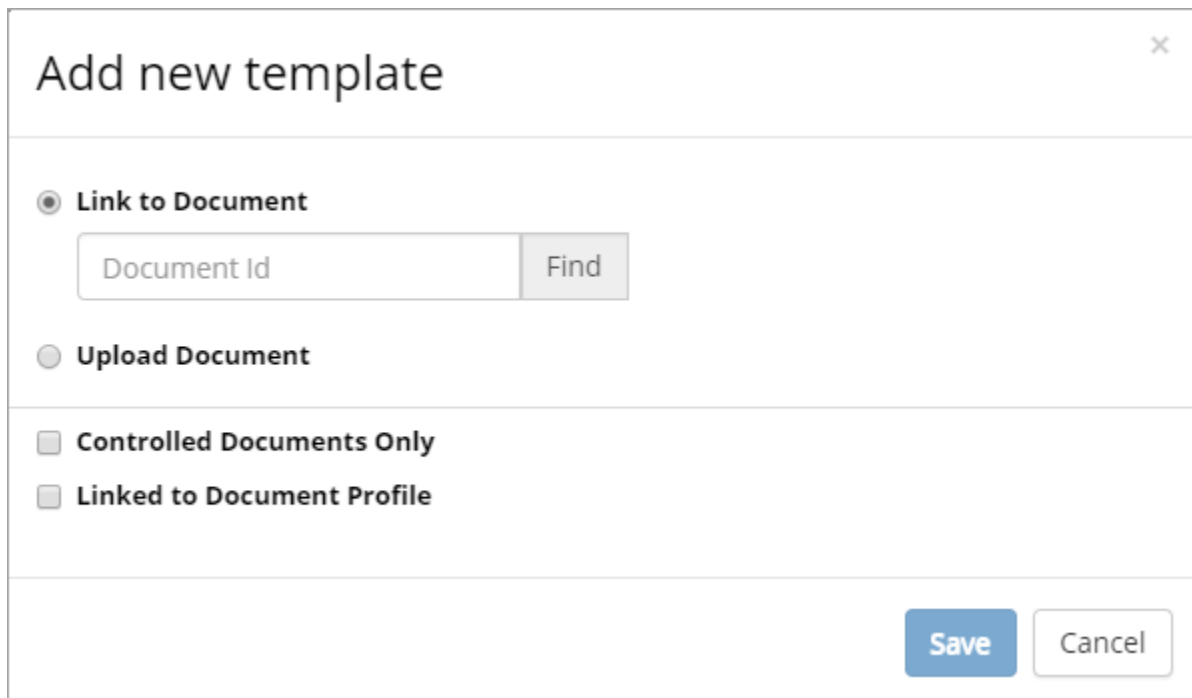
Document Management > Document Templates

+ Add new template Categories

Language
English

Template Name	Scope	Document Profile	Categories
abc-german		Prozess Document	
Blank Document		Controlled Document	
Blank Document		Human Resources	
Customer Frame Agreement		Customer Document	

The following is shown:



Add new template

☒ **Link to Document**

Document Id Find

☐ **Upload Document**

☐ **Controlled Documents Only**

☐ **Linked to Document Profile**

Save Cancel

You can either link to an existing, published controlled document (and by this handle templates in both a controlled and useful manner), or prepare and upload a new document, to use as a template.

If Categories are used (which they are not in the following examples) a list of available Categories is available, for example:

Add new template

Link to Document

Document Id

Find

Upload Document

Categories

Controlled Documents Only

Linked to Document Profile

Save

Cancel

Link to Document

To link to a published controlled document:

1. Enter the document-id and click “Find”.
2. When you have found the document, click “Save”.

Note: When a new edition of the linked document is published, the template is automatically updated. When an editor creates a new document based on document type with a linked document as template, the latest edition is always used. Existing, published documents are not changed.

Tip: You can click the link to download the template (for example to create a new template). You can click the i-icon to view the document’s properties.

Edit template

☒ **Link to Document**

3 Find

Title	Document Id
Project Budget Template	3

☐ **Upload Document**

Upload document

To upload a document to use as a template:

1. Select “Upload Document”.
2. Set a name. This name is displayed for the author, so make sure it’s really understandable.
3. Click “Browse” to find the document on your computer and select it.
4. Click “Save”.

Important Note!: The maximum size for a template document is 50 MB.

Controlled Documents Only or general template

If this template is applicable for Controlled Documents only, do the following:

1. Select “Controlled Documents Only”.
2. Select Document Profile to connect the template to.

If this template is applicable for general documents, as well as for Controlled Documents, do the following:

1. Select “Linked to Document Profile”.
2. Select Document Profile to connect the template to.

Here’s an example of the settings for a template that is a published controlled document (linked to), used both as a general template and as a template for Controlled Documents:

Edit template

Link to Document

3

Find

Title	Document Id
Project Budget Template	3

Upload Document

Controlled Documents Only

Linked to Document Profile

Project Document x

Save

Cancel

The Document Wizard

If the feature “Omnia Document Management New Document Wizard” is activated for the tenant, all Documents libraries will use the Omnia Document Wizard when a new document is created. Here’s an example:

338

Chapter 1. Topics

Create New Document

☐ Controlled Document

Select a template

English

Document with header

Corporate Presentation Template

Sales Report Template

Project Report Template

Blank Word Document

Göteborg Office

Product Presentation Template

Stockholm Office

Select a location

SUGGESTED

FOLLOWED

ALL

Project Alpha

Extranet Application 11

Extranet Application Deployment

Quality Department

Extranet Application 3

Extranet Application 1

IT Department

Extranet Application 8

Extranet Application 4

Extranet Application 2

Documents

Form Templates

Site Assets

CREATE

CANCEL

The available general templates are displayed to the left and selected there for the new document. Furthermore, the author can choose any site he or she has access to, for a location to save the document, even down to selecting a specific folder.

Document Termination

When the Retention Date of a document is reached, the Retention Manager will receive an e-mail. The e-mail contains a link to the Document Termination page:

Document Management > Document Termination

Document Id:

Document Id

Find

Retention Date:

Title

Status



Edition

Modified

There are no items to show in this view.












Delete Files

To be able to terminate a document (completely remove it from the system), the Retention Manager needs to enter the Document Id. The Document Termination list will then show all files (drafts, appendices, hidden files, published and archived files) connected to that Id. Here's an example:

 Document Management >  Document Termination

Document Id:

Retention Date: 2024-04-15

	Title	Status	Edition	Modified
	Set up new server  1	Published	3	2018-05-03
	Set up new server	Archived	1	2018-04-18
	Set up new server	Archived	2	2018-05-03
	Set up new server	Unprocessed	1	2018-03-20
	Set up new server	Unprocessed	2	2018-04-20
	Set up new server  1	Unprocessed	3	2019-04-15
	Set up new server  1	Unprocessed	4	2019-04-15

All documents can be opened by clicking the links (even appendices) to check the contents. When all checks are done, the Retention Manager clicks “Delete Files” to terminate all files present in the list.

Once a controlled document is terminated, it can not be restored. (The individual files can be recycled from SharePoint for an additional period of time).

Document Types

When creating a new controlled document an author selects a Document Type. Document Types can be grouped. In that case the author first selects group and then Document Type within that group.

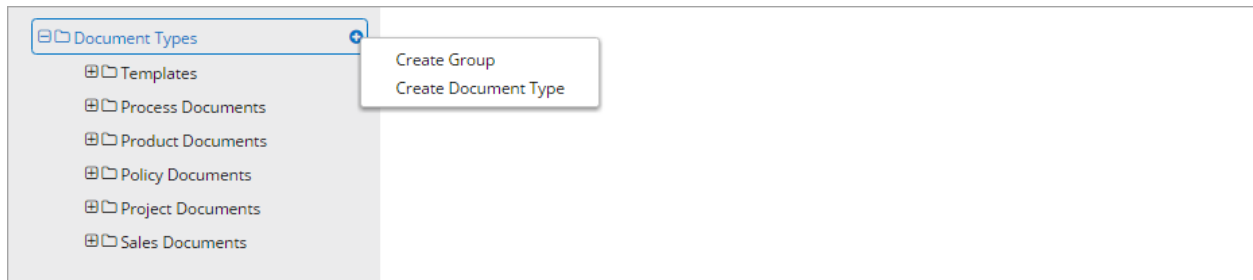
A Document Type contains the following:

- A document Profile.
- Document templates selected from the templates defined in the profile.

Creating a Document Type or Group

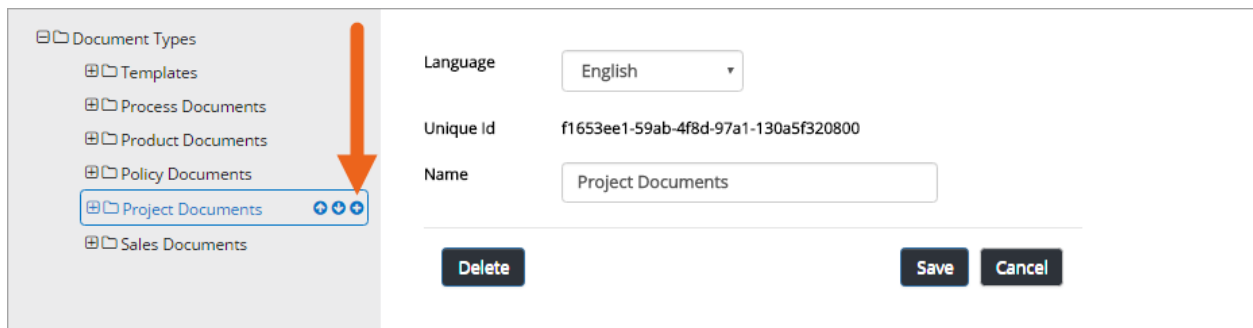
To create a new Document Type or a group:

1. Click the plus and select what you will do.



If you create a group, a name is all that is required. The name can be set in the languages you use.

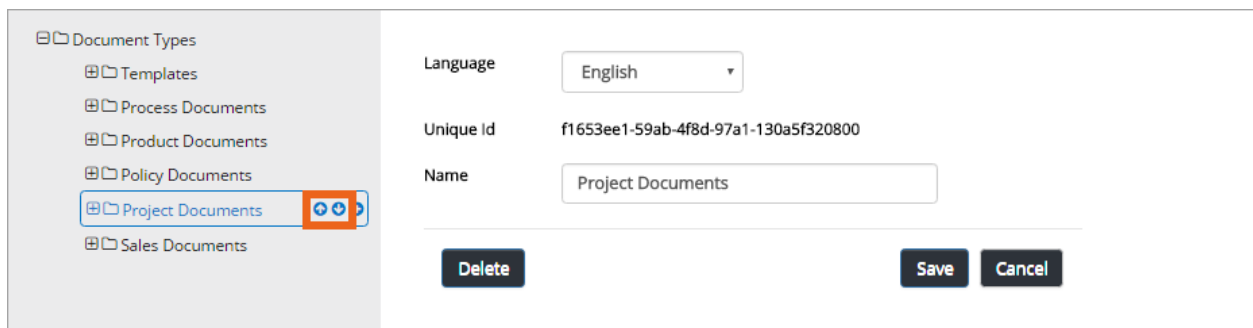
2. To create a Document Type in a group, select the group and click the plus there.



It's also possible to create sub groups this way.

You can sort if you want to present the list in a specific order to the editors.

1. Select the group or Document Type to move and use the arrows.



Edit, delete or move a Document Type or group

1. Select the type or group and use the buttons.

General

Publish

Review

Archive

Language

English

Name

Customer Agreement

Document Profile

Customer Agreement Document x

Document Templates

Customer Frame Agreement x

Blank Document x

Allow Appendices

☒

Unique Id

cec837a3-8fab-49b6-9c4f-8c79ab32b178

Enabled

☒

Delete

Move

Save

Cancel

You can move a Document Type to another group, if needed.

1. Select the type and click “Move”.

Document Types

- Policy Documents
- Quality System
- Process Documents
- Product Documents
 - Product Manual
 - Product Sheet
 - Product Beatsheet**
 - Product Handbook
 - Product Specification
- Project Documents
- Sales Documents
- Agreements
- Meeting Minutes
- Templates
- Fastighetsdokument

General | Publish | Review | Archive

Language: English

Name: Product Beatsheet

Document Profile: Product Document x

Document Templates: Blank Document

Allow Appendices: ☐

Unique Id: 1eb338bb-37d4-48ff-9361-73cafc18ce54

Enabled: ☒

Delete Move Save Cancel

2. Select group to move to, and click “OK”.

Move Document Type

Document Types

- Policy Documents
- Quality System
- Process Documents
- Product Documents**
- Project Documents
- Sales Documents
- Agreements
- Templates
- Fastighetsdokument

OK Cancel

Settings for Document Types

The settings are organized into four tabs, see the sections below.

The General tab

Use the fields on this tab the following way:

The screenshot shows the 'General' tab of a settings interface. At the top, there are four tabs: 'General' (selected), 'Publish', 'Review', and 'Archive'. Below the tabs, the settings are organized into a form with the following fields and controls:

- Language:** A dropdown menu with 'English' selected.
- Name:** A text input field containing 'Product Manual'.
- Document Profile:** A text input field containing 'Product Document x' with a tag icon on the right.
- Document Templates:** A text input field with a dropdown arrow, showing 'MX Product Manual' with a close button.
- Default Document Template:** A text input field with a dropdown arrow.
- Allow Appendices:** A checkbox that is checked.
- Allow To Be Used As Template:** A checkbox that is unchecked.
- Allow Connect to Template:** A checkbox that is unchecked.
- Unique Id:** A text input field containing the value '8a502761-5a16-4398-a04d-47d7f801dd06'.
- Enabled:** A checkbox that is checked.

At the bottom of the form, there are four buttons: 'Delete', 'Move', 'Save', and 'Cancel'.

- **Language:** Select language for documents from this Document Type.
- **Name:** The name is displayed when the author selects Document Type to create, so make sure it's understandable.
- **Document Profile:** Select a Document Profile.
- **Document Templates:** Select one of the templates defined for the profile you have chosen. You must always do that even if there's just one template.
- **Default Document Template:** Use this option to select one of the templates for this Document Type as the default template. When selecting the Document Type, the author then has this template pre selected.
- **Allow appendices:** Check this option to allow for appendices. Authors can then tie other documents as appendices to the main documents. This option must be checked to make it possible for this document type.
- **Allow to be used as template:** In the Controlled Documents Viewer the "Create Document Icon" column can be added. A document can be created using the icon only if it belongs to a Document Type that has this option selected. if not, the icon is not shown.

- **Allow Connect to Template:** This option is mainly used in migration scenarios. If this option is selected it works like this: When a Controlled Documents author creates a new draft or uploads a document that is not connected to a Controlled Documents template, a message is shown allowing the author to connect that document to a template.
- **Unique id:** Created by the system.
- **Enabled:** When selected, this Document Type will be available for authors.

The Publish tab

Here you select options for approval and PDF conversion for this document type.

The screenshot shows the 'Publish' tab of a document management system. At the top, there are four tabs: 'General', 'Publish' (active), 'Review', and 'Archive'. Below the tabs, there is a section with a checkbox labeled 'Do not replace property placeholders with values on publishing', which is checked. This is followed by a 'Publishing Approval' section with five radio button options: 'No Approval', 'Anyone', 'Limited list of users', 'Term-driven', and 'Based on person column' (which is selected). Below this is a dropdown menu showing 'Document Owner'. The final section is 'Conversion', with two radio button options: 'No Conversion' (selected) and 'Convert DOCX to PDF'.

When a document is published, the placeholders will be replaced with metadata, but for a document that will be used as a template, you will probably not want that to happen. In that case, select “Do not replace property placeholders with values on publishing”.

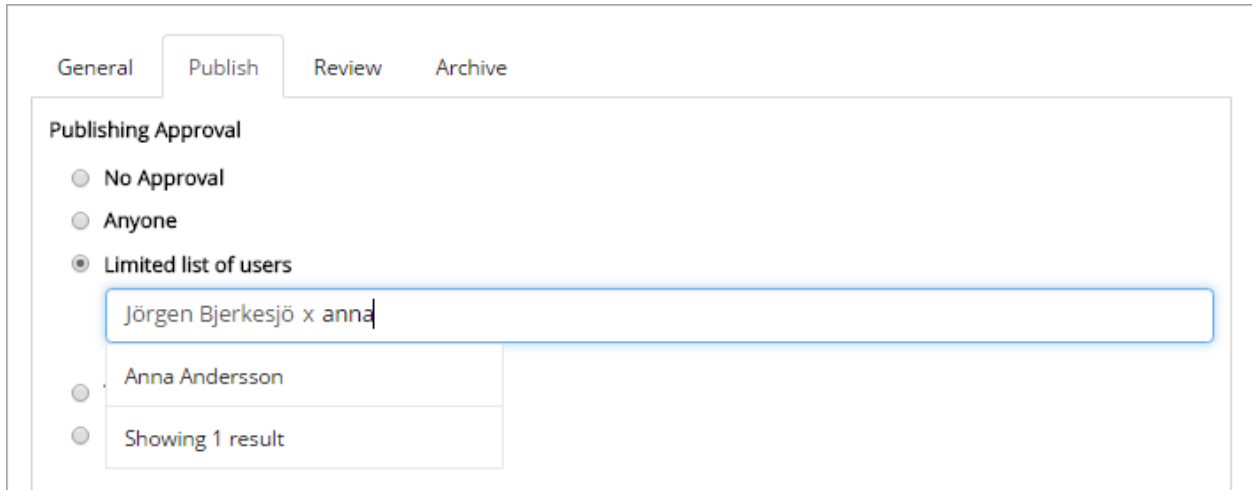
Publishing Approval

- **No approval:** As it says - no approval will take place. A document will be published immediately when an author clicks “Publish”.
- **Anyone:** The author can select any user of the portal as approver.
- **Limited list of users:** Authors can select approvers from a defined list only (see below for more information).
- **Term-driven:** Authors can select approvers from a defined list only (which approvers will be available depends on the Properties selected for the documents, see below for more information).
- **Based on person column:** You then select one of the person columns defined, most often Document owner or Approver.

Define limited list of approvers

Follow these steps to define a list of approvers for authors to choose from. This list will then be available for all documents, in the Approval Workflow.

1. Select “Limited list of users”.
2. Add all portal users that should be able to act as approvers, to the field.



The screenshot shows the 'Publish' tab with the 'Publishing Approval' section. The 'Limited list of users' radio button is selected. Below it, a search bar contains the text 'Jörgen Bjerkesjö x anna'. A dropdown list shows 'Anna Andersson' and 'Showing 1 result'.

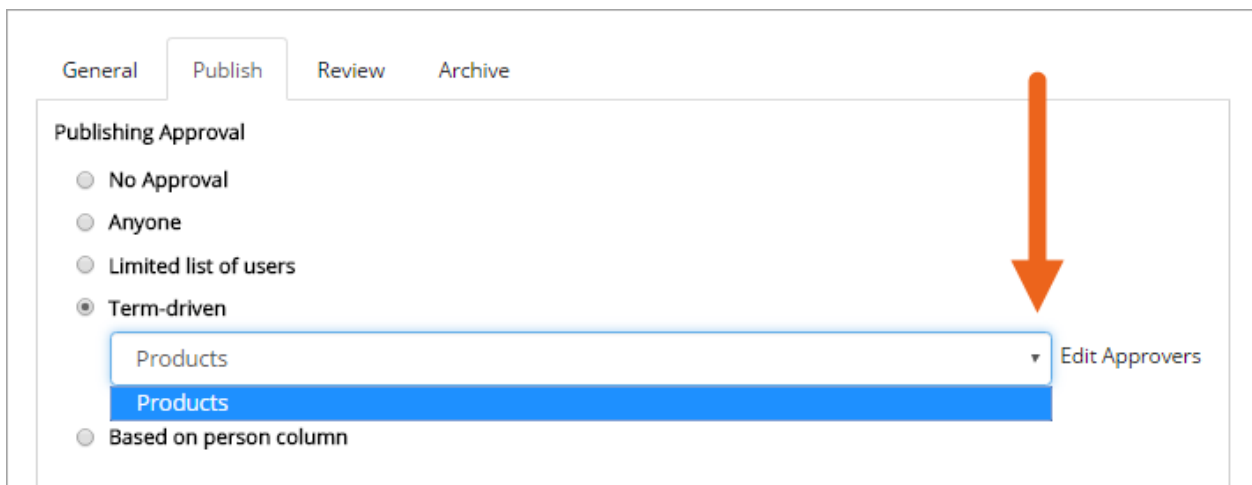
(You don't save the list separately, you save the list when you save the Document Type.)

Define term-driven lists of approvers

Here you can define separate lists of approvers for each metadata term (property) available in the Document Profile. The appropriate list will then be shown for the author, in the Approval Workflow, depending on properties selected for the document.

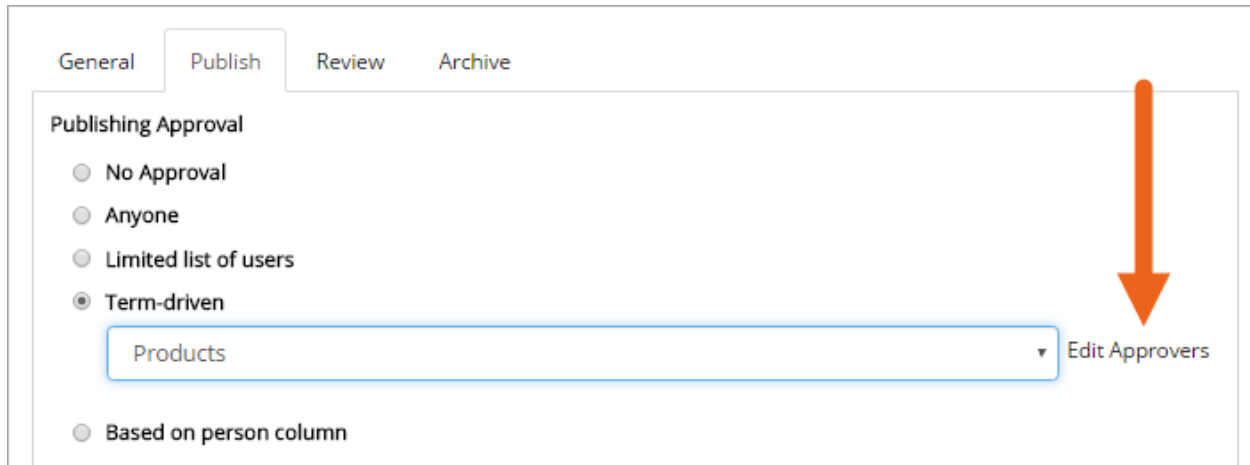
Follow these steps:

1. Select “Term-driven”.
2. Select metadata (Property) field.



The screenshot shows the 'Publish' tab with the 'Publishing Approval' section. The 'Term-driven' radio button is selected. Below it, a dropdown menu shows 'Products' selected, with a blue bar highlighting it. An orange arrow points down to the 'Edit Approvers' link next to the dropdown.

3. Click “Edit approvers”.



General Publish Review Archive

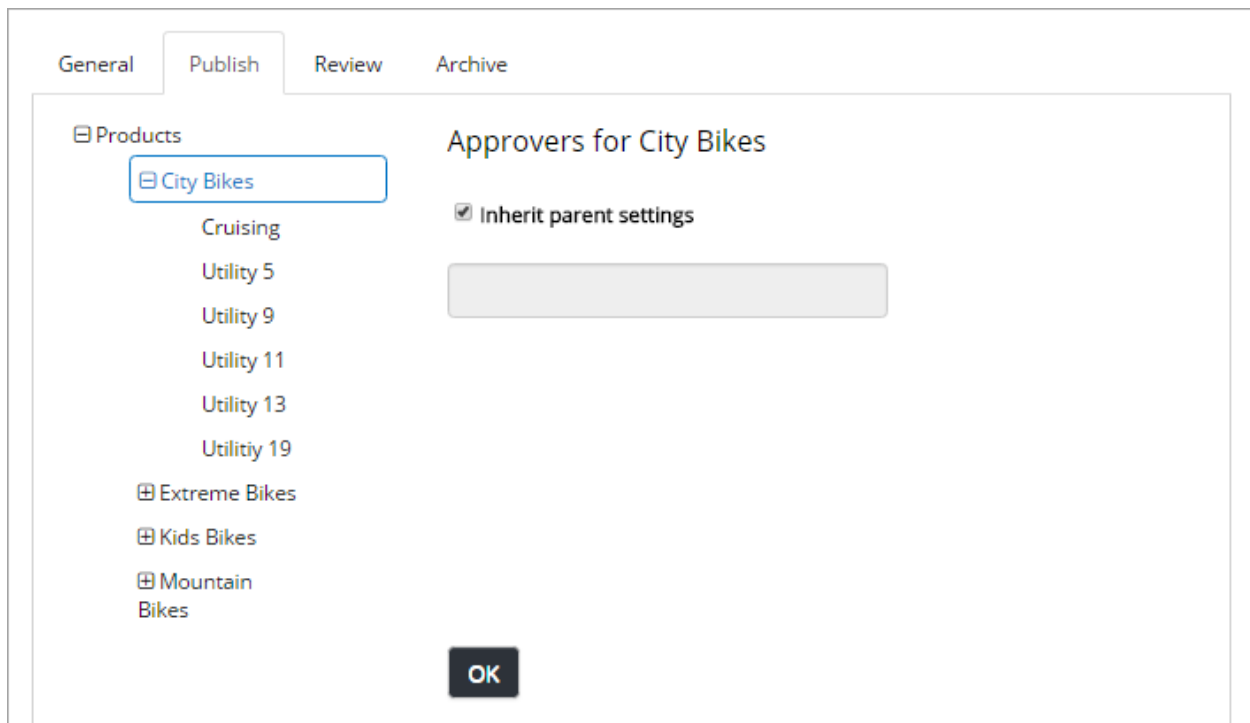
Publishing Approval

- ☐ No Approval
- ☐ Anyone
- ☐ Limited list of users
- ☒ Term-driven

Products ▼
- ☐ Based on person column

Edit Approvers

4. Select property (main property or sub property).



General Publish Review Archive

Products

- City Bikes
 - Cruising
 - Utility 5
 - Utility 9
 - Utility 11
 - Utility 13
 - Utility 19
- Extreme Bikes
- Kids Bikes
- Mountain Bikes

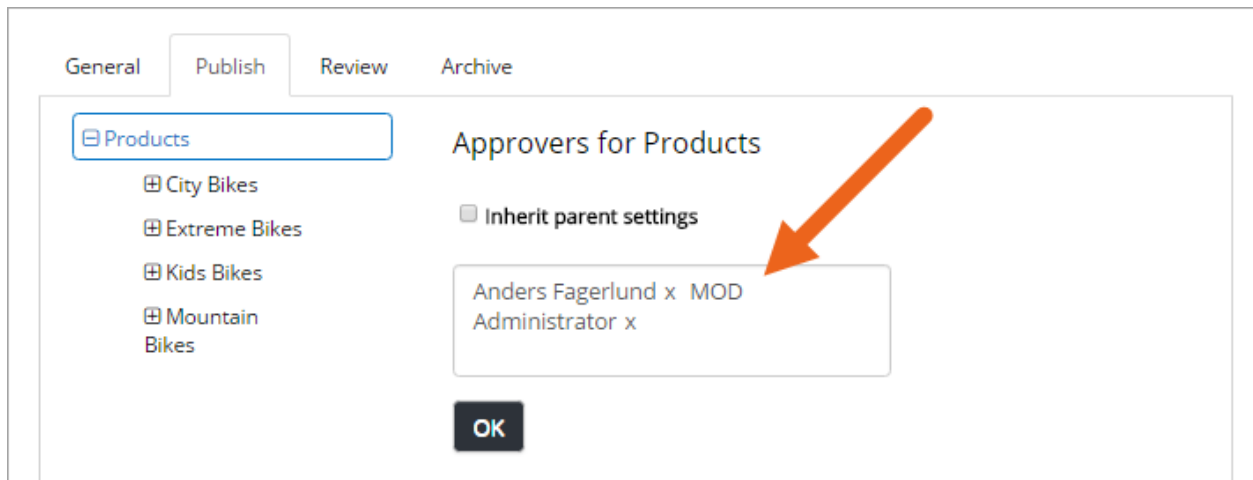
Approvers for City Bikes

☒ Inherit parent settings

OK

Note! If you select a main property, the settings will apply for all sub properties as well.

5. Add all portal users that should be able to act as approvers for the selected property/properties, to the field.



6. Click “OK”.

Conversion

At the moment, only conversion of docx files is possible.

1. First select if conversion should be available for the document type or not. Conversion is available as default.
2. Then, if conversion is on, you can select available options for the author:

Conversion

- ☐ No Conversion
- ☒ Convert DOCX to PDF
- ☐ Optional, Unchecked by Default
- ☐ Optional, Checked by Default
- ☐ Mandatory

- **Optional, unchecked by default:** Author can select to convert or not for each document. Default: unchecked.
- **Optional, checked by default:** Author can select to convert or not for each document. Default: unchecked.
- **Mandatory:** All documents of this document type will always be converted when published.

The Review tab

This tab is used for review and feedback settings.

The screenshot shows the 'Review' configuration panel. At the top, there are tabs for 'General', 'Publish', 'Review' (selected), and 'Archive'. Below the tabs, the 'Feedback Recipients' section has a dropdown menu with 'Document Owner' selected. The 'Review Reminder' checkbox is checked. Below this, there are two radio buttons: 'Review Interval' (selected) and 'Specific Date'. The 'Review Interval' is set to 30 months. The 'Specific Date' is a dropdown menu. Below these, the 'Send reminder in advance' is set to 30 days. The 'Create review task' section has a checkbox labeled 'assigned to' which is checked, followed by a dropdown menu. The 'Task expire in' is a dropdown menu. The 'E-mail Recipients' is a dropdown menu. At the bottom, there is a link labeled 'Edit Message'.

- **Feedback Recipients:** Select either Document Owner or Approver.
- **Review reminder:** Select this box to activate review reminders.

When review reminders are activated you can set the following:

- **Review interval:** Set number of months for Review interval. Each month a list is created for you and sent by e-mail. The lists contain all Document Types that needs a review the upcoming month.
- **Specific date:** If this document type is connected to a document profiles that contains a date field, you can set review related to the date entered there.
- **Send reminder in advance:** Set the number of days that a reminder should be sent, before the reminder date.
- **Create review task:** If a review task should be created, check the “assigned to” box. Then use the list to select who to assign the task to.
- **Task expire in:** Set the number of days before the task will expire.
- **E-mail Recipients:** Select either Document Owner or Approver.
- **Edit message:** Klick this link to edit the text for the e-mail or the text for task.

Edit Message

E-mail Task

☒ Custom Message en-US

Subject

Body

OK Cancel

Select “Custom message” to override the standard message with one of your own, select language and type a subject and text’s body. Don’t forget to save when you’re done.

The Archive tab

You can decide that a certain Document Type should not be archived. If the Document should be archived, you can set archive to be used.

General Publish Review **Archive**

☒ Archive

☒ Default

☐ Custom

Do the following, if you don't want to use the default settings:

1. Select "Custom".

The Retention tab

If Retention is activated, this tab is shown for all Document Types:

General Publish Review Archive **Retention**

☒ Limit Retention

☒ Calculated Last Published + 5 years

☐ Specific Date

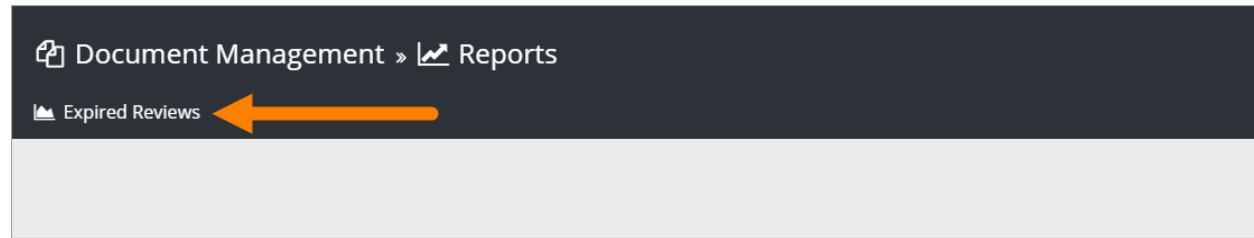
Use this tab to set up a Retention Policy.

- **Limit Retention:** Deselect this option if a Retention Policy should not be set for this Document Type.
- **Calculated:** You can select to calculate the number of years on either when the document was first published or when it was last published.
- **Years:** Add the number of years for the Retention Policy for this Document Type.
- **Specific Date:** Select this option to allow authors to set a specific Retention Date instead, and then select the Retention Date field in the list. **Note!** Before selecting "Specific Date" here, make sure a Date property (field) for Retention Date is available for the Document Profile used in the Document Type - and add such a field if needed. The Property type must be "Date" for this field.

When the set Retention time has passed, the Retention Manager will receive an e-mail. The e-mail includes a link to a page where the document can be terminated (completely removed from the system).

Document Reports

Under Reports in Omnia Admin you can click "Expired Reviews" to get a list of all Document Types with expired review intervals.



Here's an example of a report:

	Title	Document Id	Edition	Published	Review Date ↑
	Product Manual Cheetah	CD-ADX-64	2	2017-03-07	2017-02-22
	Produktmanual Cheetah	CD-ADX-69	1	2016-08-22	2017-02-22
	Product Manual MTB 40	CD-ADX-75	2	2016-10-20	2017-02-22
	Produkt Instrukcja Obsługi Utility 11	45	1	2016-08-24	2017-02-24
	Product Manual MTB 44	CD-ADX-78	1	2016-08-27	2017-02-27

If you would like to have a closer look at a document, just click the link to open the document.

Documents Bulk Update

Use this option to bulk update any of the defined document management properties. One example could be if a colleague will no longer be document owner for a number of documents. With this option you can easily replace that name with another. Note that not all properties can be replaced, for example Approver.

- Start by selecting property, add the property value to be replaced, and then click “Find”.

Search Property * 1

Property Value * 2

3

	Title	Document Id	Edition	Published	Update Status
There are no items to show in this view.					

The list of published documents is displayed.

















1. Select the documents to update (with other words, you can select any number of the documents in the list, to update).
2. Add a new value and click “Replace”.

Unpublish

If needed, a published document can be unpublished. The document will then not be available for reading. The document is also removed from the Controlled Documents library and a copy is placed in the archive.

Note! A document can't be unpublished if a draft has been created for that document. The draft must first be deleted.

The “Unpublish” option can be used on the “Published” tab and is found in a document’s menu, for example:

DRAFTS TASKS PUBLISHED							
<div>Search </div>							
	Title ▾	Document Id ▾	Edition ▾	Process ▾	Document Owner ▾	↓ Approved ▾	Status
	New Product Success Program	ADX-30	3	Develop Products	Robert Johnson	2019-01-25	Published
	Lessons Learned Reflections	ADX-153	1		Robert Johnson	2019-01-15	Published
	Project Closure Checklist	ADX-122	8		Robert Johnson	2019-01-08	Published
	Planning Guidelines (Products)		5	Develop Product	Anna Karlsson	2019-01-08	Published
	Project Closure Procedure		1		Robert Johnson	2018-12-19	Published
	Project Closure Instruction		3		Robert Johnson	2018-12-13	Published
	Product Portfolio Strategy		3		Robert Johnson	2018-12-07	Published
	Project Plan Template		6	Envisioning	Robert Johnson	2018-12-06	Published
	Prototyping Best Practice		6	Prototyping	Robert Johnson	2018-12-06	Published
	Development Procedures		7	Develop Product	Robert Johnson	2018-11-09	Published
	Cheetah X3 Manual 		2		Robert Johnson	2018-10-20	Published
	Market Test Checklist		6		Robert Johnson	2018-09-28	Published
	Analyzing Test Results Guidelines		1		Robert Johnson	2018-08-24	Published

- Create Draft
- Related Documents
- Related Processes
- Properties
- Document History
- Feedback
- Read Receipt Status
- Move Document
- Unpublish





















Archive

There is always at least one archive for an ODM installation, regardless of the number of sites used for authoring and publishing - but there can be several archives. The Controlled Documents Archive(s) are set up during installation. There is no settings you can do there.

A copy of all published document’s editions are normally placed in an archive, but for some Document Types that really don’t need to be archived, it can be turned off. In which archive documents of a certain Document Type should be archived (if there are several archives) can also be set for the Document Type.













The following information is available in the archive:


Search

Document Id	Edition	Title	Document Type
ADX-1	2	 Adventrix Word Template	
ADX-1	3	 Adventrix Word Template	
ADX-1	1	 Adventrix Word Template	
ADX-1	4	 Adventrix Word Template	
ADX-1	5	 Adventrix Word Template	
ADX-2	1	 Adventrix Presentation Template	
ADX-2	2	 Adventrix Presentation Template	
ADX-2	3	 Adventrix Presentation Template	
ADX-2	4	 Adventrix Presentation Template	
ADX-3	1	 Leave-Application	

You can search for documents and sort the list on the headings, to make it easier to find information about a certain document edition.

To be able to see information about a specific edition, click the i-icon.

ADX-1	4	 Adventrix Word Template	
ADX-1	5	 Adventrix Word Template	
ADX-2	1	 Adventrix Presentation Template	
ADX-2	2	 Adventrix Presentation Template	
ADX-2	3	 Adventrix Presentation Template	
ADX-2	4	 Adventrix Presentation Template	



The property information for the document is shown to the right. To see the document history, for example the dates when the editions was available for users (published), click the link:

The screenshot displays a SharePoint document library. On the left, a table lists documents with columns for document ID, count, and icon. On the right, a details pane for the 'Adventrix Presentation Template' document is open. The details pane includes a 'Show Document History' link, which is highlighted by an orange arrow. Below this link are several sections: 'Document Type' (Corporate Template), 'Limited Read Access' (checkbox), 'Users with Read Access', 'Notify To Users' (checkbox), 'Require Read Receipt' (checkbox), 'Title' (Adventrix Presentation Template), 'Document Owner' (Robert Johnson), 'Market Region', 'Office', and 'Product'. A 'CLOSE' button is located at the bottom right of the details pane.

SharePoint		
ADX-1	4	
ADX-1	5	
ADX-2	1	
ADX-2	2	
ADX-2	3	
ADX-2	4	
ADX-3	1	
ADX-3	2	
ADX-4	1	
ADX-8	1	
ADX-9	6	
ADX-9	5	
ADX-9	4	
ADX-9	1	
ADX-9	2	
ADX-9	3	

Adventrix Presentation Template

[Show Document History](#)

Document Type
Corporate Template

☐ Limited Read Access

Users with Read Access

☐ Notify To Users

☐ Require Read Receipt

Title
Adventrix Presentation Template

Document Owner
Robert Johnson

Market Region

Office

Product

CLOSE

Something like the following is shown:

Document History - Adventrix Presentation Template					
Edition	Revision	Published	Comment	Approved By	
3		2018-03-22 15:47:48	Demo	Robert Johnson	Workflow History
2		2017-12-12 08:35:47	Please approve version with new corporate colors.	precio fishbone	Workflow History
1		2017-09-07 11:49:08		precio fishbone	Workflow History
					CLOSE

Note that the edition you selected, and the editions before that, is listed. To get a list of all editions you have to select the last one. In this example, there is an edition 4, that is not listed here, as we selected edition 3.

As you can see, you can even access the workflow history for each edition listed. This is the same information that is available through the Published tab in the Controlled Documents library. Here's an example with one of the posts expanded:

Workflow History - Adventrix Presentation Template

2017-12-12 08:34:04: Draft Created

2017-12-12 08:35:25: Publish Workflow

- Initiator:** Robert Johnson
- Approver:** precio fishbone
- Approval Due Date:** 2017-12-20
- Comment:** Please approve version with new corporate colors.
- 2017-12-12 08:35:38: Task completed by precio fishbone
 - Comment:** ok

1.6.2 Author











Controlled Documents Library

When a group site has been set up for Controlled Documents authoring, the following will be available for Controlled Document authors:

- A documents library (Controlled Documents) that only users defined in the author's permission group can work with.
- A Send for Comments Workflow.

- A Publish Workflow.
- A Tasks list.
- Workflow History.
- Document History for drafts.
- Document History for the published editions.
- Options for relating to other documents.
- Options for relating to QMS Processes (if Omnia QMS is installed).
- Options for creating a new draft from a published document.
- Options for unpublishing a published document.

In the Controlled Documents library, authors can find three tabs:

DRAFTS TASKS PUBLISHED									
Search 									
Document Type ▾		Title ▾	Status	Published ▾	Applies To ▾	Edition ▾	Review Date ▾	Review Reminder Date ▾	Application ▾
Work Instruction		Instruction Moulding frame ADX 100	Published	2018-12-18		1	2019-12-18	2019-11-28	
Application Manual		Dynamics AX - Create orders	Published	2018-12-09		3	2019-06-09	2019-05-10	Dynamics AX
Supplier Agreement		Supplier A	Published	2018-11-13		2	2018-10-24	2018-10-19	
Corporate Policy		Managing Personal Data Policy	Published	2018-10-09		3	2019-10-09	2019-09-09	
Application Manual		Dynamics - Order Form	Published	2018-10-09		1	2019-04-09	2019-03-10	Dynamics AX
Application Manual		CRM Manual	Published	2018-10-09		2	2019-04-09	2019-03-10	CRM
Corporate Policy		Data Management Policy	Published	2018-10-09		3	2019-10-09	2019-09-09	
Work Instruction		Work Instruction Welding MTB	Published	2018-07-17	Production	1	2019-07-17	2019-06-27	

“Drafts” is used when creating and editing drafts for new Controlled Documents or when updating an existing document for a new edition. Note that there are several options available for creating a new draft document, see below.

“Tasks” is a list of tasks for the documents – either for review or for publication – both active and finished.

When a document is published (approved for publication) it is removed from Drafts and is available on the “Published” tab. Here the options for creating a new draft, unpublishing and Document History are available.

Most headings can be used to sort the list.

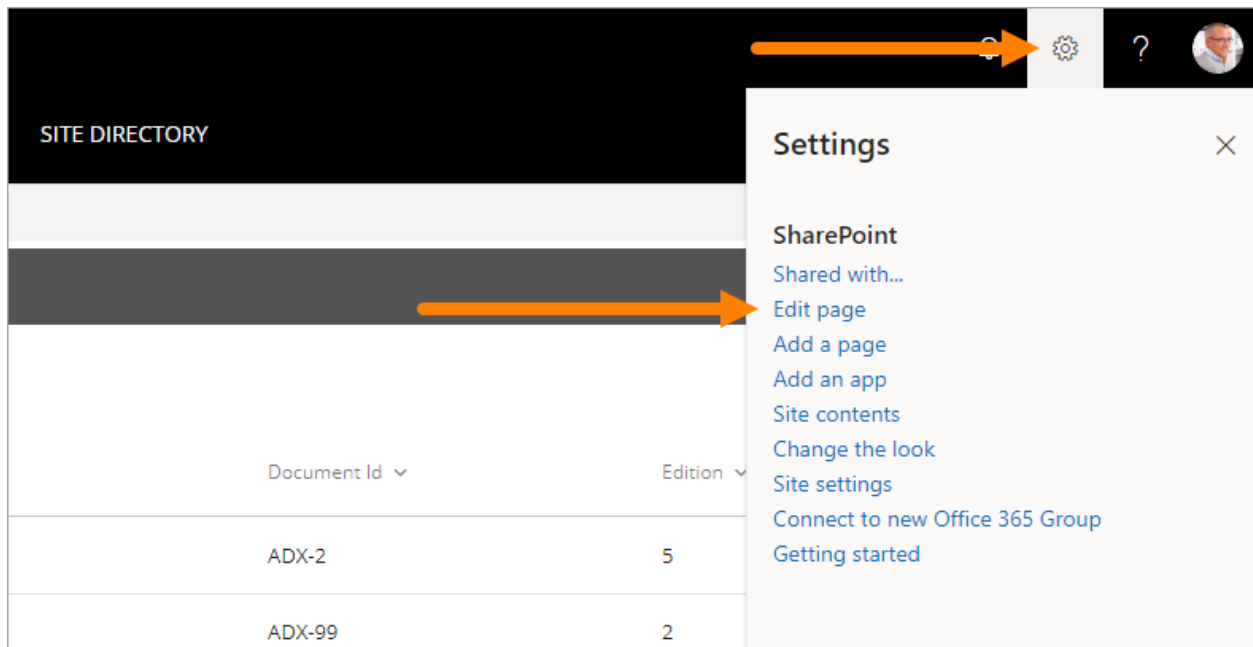
What fields to display on each tab can be selected in the settings, see below.

Settings for the Controlled Documents library

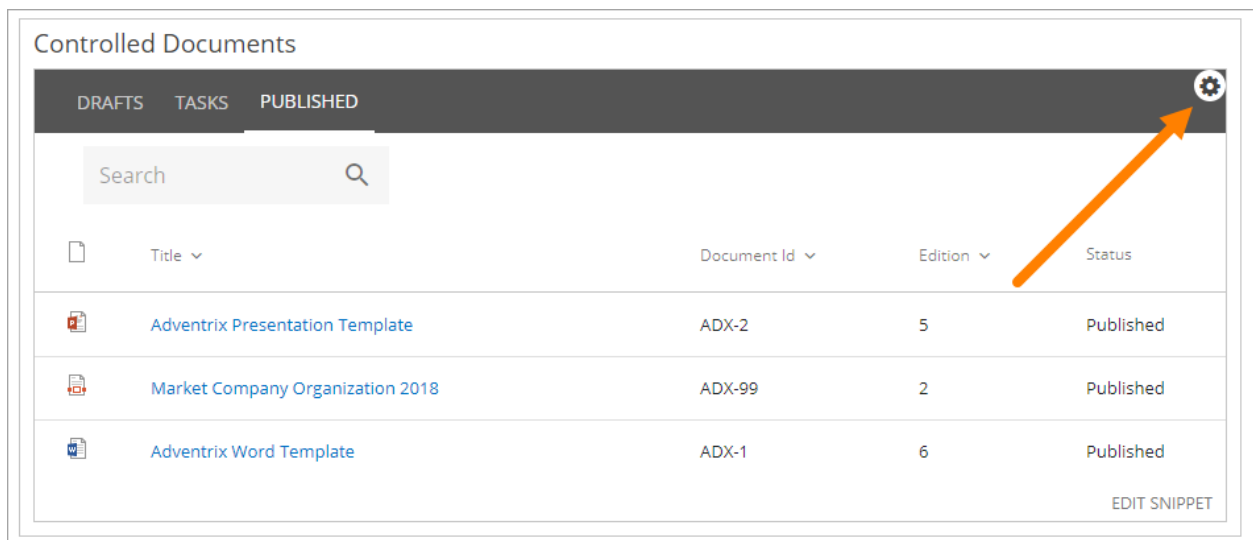
As a Site Collection Administrator you can set a number of settings for the three lists in the Controlled Documents library.

Find the settings this way:

1. Click the cog wheel and select “Edit page”.



2. Open the settings.



Don't forget to save when you have changed any settings. The "Save" button is at the very bottom of the window.

The General tab

Here you can use the following settings:

Controlled Documents Library Settings

GENERAL

DRAFTS

PUBLISHED

DOCUMENT TYPES

Default tab

Published

Number of rows to display on each page

10

☐

Open in Office Web Apps

☐

Hide Tasks Tab

1.6. Document Management

SAVE

CANCEL

- **Default tab:** Decide which tab will be shown when an author enters the Controlled Documents library.
- **Number of rows to display on each page:** Set the number of rows to display before navigation to the next page will be shown at the bottom of the list.
- **Open in Office Web Apps:** If documents should be opened in Office Web Apps, instead of a locally installed application, select this option. (If you select this option, authors can still choose to edit the document in the locally installed application, when the document is open.)
- **Hide Tasks Tab:** If the Tasks tab should not be displayed for authors, select this option.

The Drafts tab

Here you can set the following:

Controlled Documents Library Settings

GENERAL

DRAFTS

PUBLISHED

DOCUMENT TYPES

Default Sort Order

Modified

Sort Direction

Descending

☒ Show Search Box

Select the columns you would like to display in the drafts view

Checkbox	<input checked="" type="checkbox"/>
File Type	<input checked="" type="checkbox"/>
Appendices Icon	<input type="checkbox"/>
Appendices	<input type="checkbox"/>
Title	<input checked="" type="checkbox"/>
Document Menu	<input checked="" type="checkbox"/>
Document Status	<input checked="" type="checkbox"/>
Processing Status	<input checked="" type="checkbox"/>
Modified	<input checked="" type="checkbox"/>

SAVE

CANCEL

- **Default Sort Order:** Select the column for default sort order for the list.
- **Sort Direction:** Select Descending or Ascending for the default column selected above.
- **Show Search Box:** If authors should be able to search for drafts here, select this option.
- **Select the columns**: Check the columns to display in the Drafts list, and uncheck columns you don't want to display. (But note that the some columns can't be unchecked, they are mandatory.)

The Published tab

Here you can set the following:

Controlled Documents Library Settings

GENERALDRAFTSPUBLISHEDDOCUMENT TYPES

Default Sort Order

Published

Sort Direction

Descending

☒ Show Search Box

Select the columns you would like to display in the published view

File Type	<input checked="" type="checkbox"/>
Title	<input checked="" type="checkbox"/>
Document Menu	<input checked="" type="checkbox"/>
Document Id	<input checked="" type="checkbox"/>
Edition	<input checked="" type="checkbox"/>
Appendices Icon	<input checked="" type="checkbox"/>
Related Documents Icon	<input checked="" type="checkbox"/>
Document Status	<input checked="" type="checkbox"/>
Published	<input type="checkbox"/>

SAVE

CANCEL

- **Default Sort Order:** Select the column for default sort order for the list.
- **Sort Direction:** Select Descending or Ascending for the default column selected above.
- **Show Search Box:** If authors should be able to search for documents in the Published list, select this option.
- **Select the columns**: Check the columns to display in the Published list, and uncheck columns you don't want to display. (But note that the some columns can't be unchecked, they are mandatory.)

The Document Types tab

You can set the following on this tab:

Controlled Documents Library Settings

GENERAL

DRAFTS

PUBLISHED

DOCUMENT TYPES

Language

English

Document Types

1.6. Document Management

SAVE

CANCEL

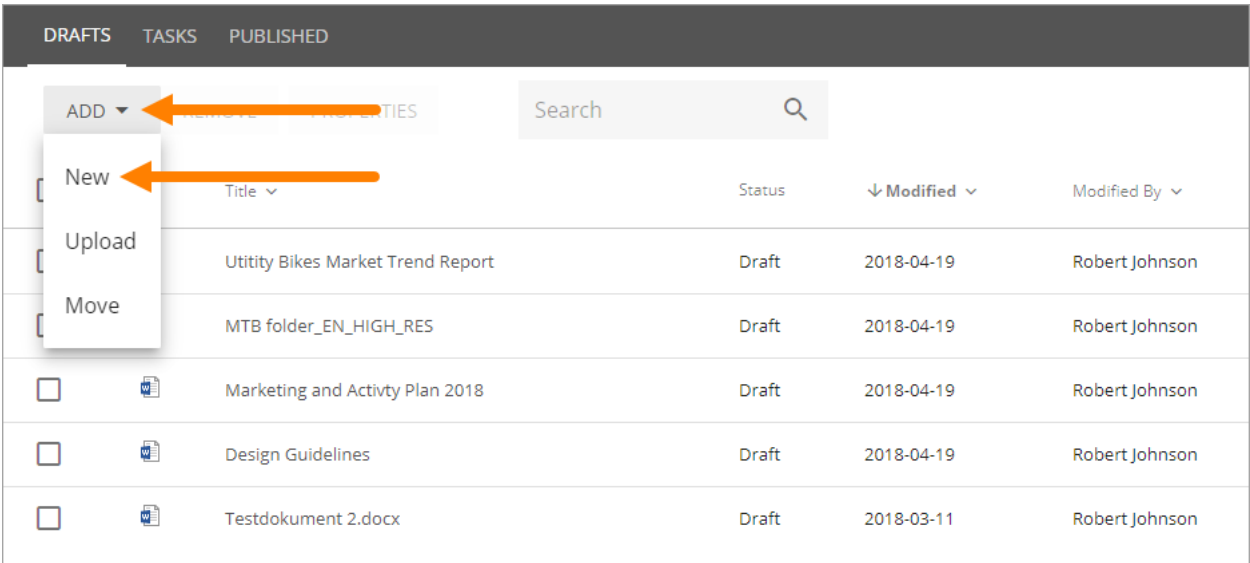
- **Language:** Select language for the Document Types to be shown in the list below.
- **Document types:** Select which Document Types should be suggested when authors adds new draft documents here. If empty, all Controlled Documents templates will be suggested.

Creating a draft document

When adding documents to a Controlled Documents library the author can either create a new draft or upload a document. If it's a Controlled Document the author will actually work with here, a document should normally be created from scratch. If it's a document that will be used as it is, for example as an appendice, it makes more sense to upload the document.

Creating a new draft document

When creating a new draft document from scratch, the first step is to select “New” in the “Add” menu.



The next step is to select language and a document type:

Create New Document [X]

☒ Controlled Document

Select type: English [v]

- Checklist
- Work Instruction
- Project TG1 Report
- Product Manual

Show all

CREATE CANCEL

The Document Types are set up in Omnia Admin.

The list displayed the suggested Document Types. To see a complete list, select “Show all”.

One or more Document Templates are available for a Document Type. If more than one is available, the next step is to select template.

Create New Document [X]

☒ Controlled Document

Select type: English [v] Select a template Select a location

Product Manual [X] Press Release Template SUGGESTED FOLLOWED ALL

Adventrix Word Template Corporate Communication

PROPERTIES

Document Owner [v]

Product Family: Kids Bikes [X]

Product [v]

Office [v]

Show all

CREATE CANCEL

And enter a Title and a File Name.

Create New Document

☒ Controlled Document

Select type

English

Product Manual

PROPERTIES

Document Owner

Product Family

Kids Bikes

Product

Office

Select a template

Adventrix Word Template

NAME

Title

File Name

.docx

Select a location

SUGGESTED FOLLOWED ALL

Corporate Communication

Show all

CREATE

CANCEL

And then, the next step is to enter information for the document's properties (metadata). What that will look like depends on the Document Type. Here's an example:

Create New Document

☒ Controlled Document

Select type

English

Product Manual

PROPERTIES

Document Owner

Product Family

Kids Bikes

Product

Office

Select a template

Adventrix Word Template

NAME

Title

General advice on application selection

File Name

General advice on application selection .docx

Select a location

SUGGESTED FOLLOWED ALL

Corporate Communication

Show all

CREATE

CANCEL

A number of mandatory fields can be present, marked with an asterisk (*). All mandatory fields must be filled in, or the document can not be published, but it does not have to be now.

Metadata can also, in some cases, be used as a filter for document lists, to make Controlled Documents available for users when they are published. Besides that, available approvers can depend on the metadata added. It's always very important that information in metadata fields are added thoroughly.

A “tag” icon to the right in a field always indicates that it is a managed metadata field, for example:

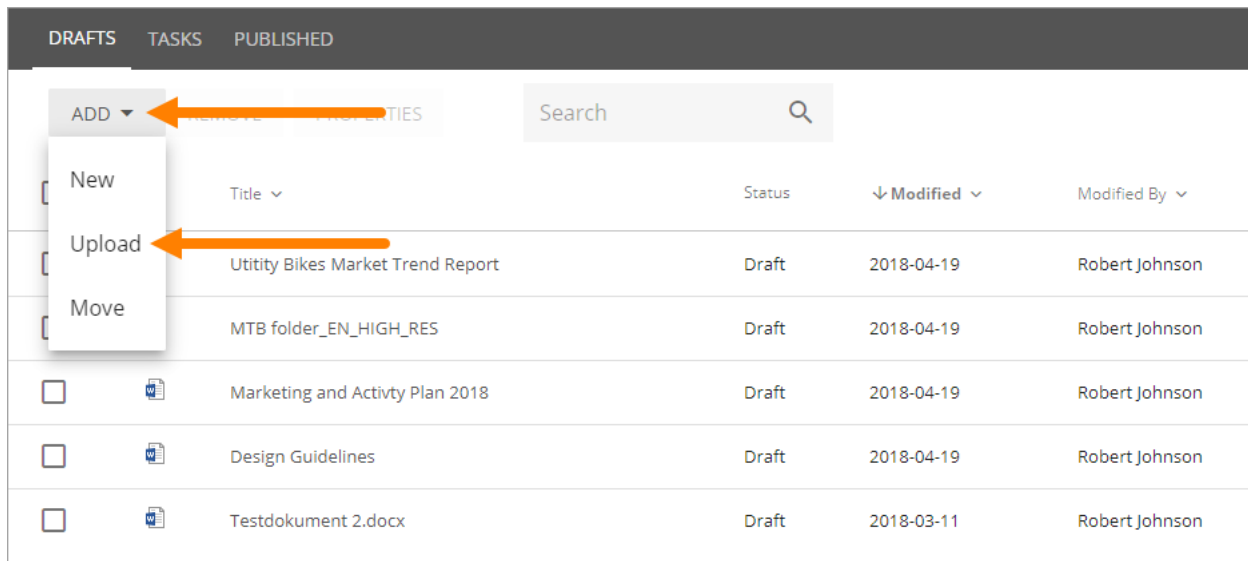
When the properties have been entered and the author clicks “Create”, the editing program (for example Microsoft Word for Word files) starts with the chosen document layout. Text and so on is entered the normal way.

Note! Metadata fields visible in the document, displayed within double brackets, should not be used in the editing process. Information will be added to these fields when the document is published.

Uploading documents

An alternative is to upload an existing document, but normally it should be used just for documents that will be added as they are, but will still be handled as Controlled Documents, for example with approval before publishing.

Upload is selected in the “Add” menu:



A Document Type has to be selected for an uploaded document and the document has to be tagged with the required metadata, or the document can't be published.

The template for the Document Type is not used for the first edition of the document, the document will be used with the existing template (of any). The next time a draft is created for an uploaded document, the template can be altered, if needed.

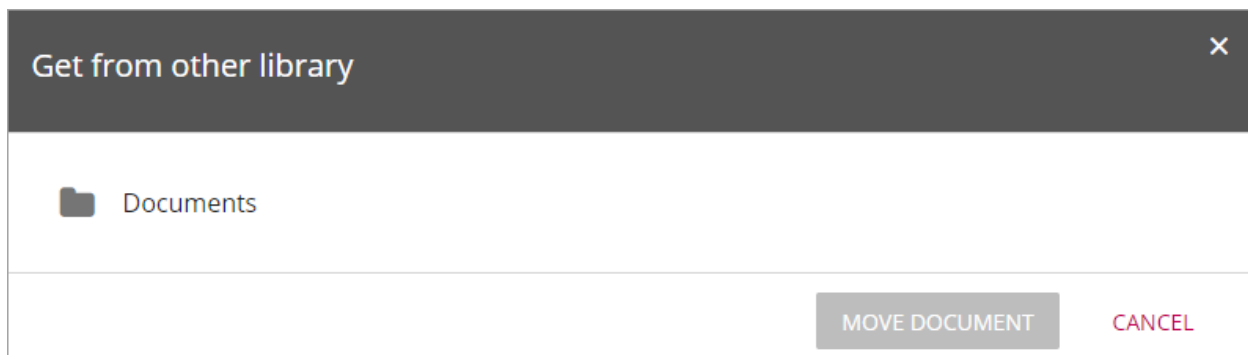
To select Document Type and add metadata, use the option "Properties" in the document's menu, after the document has been uploaded.

Move a document to the Controlled Documents library

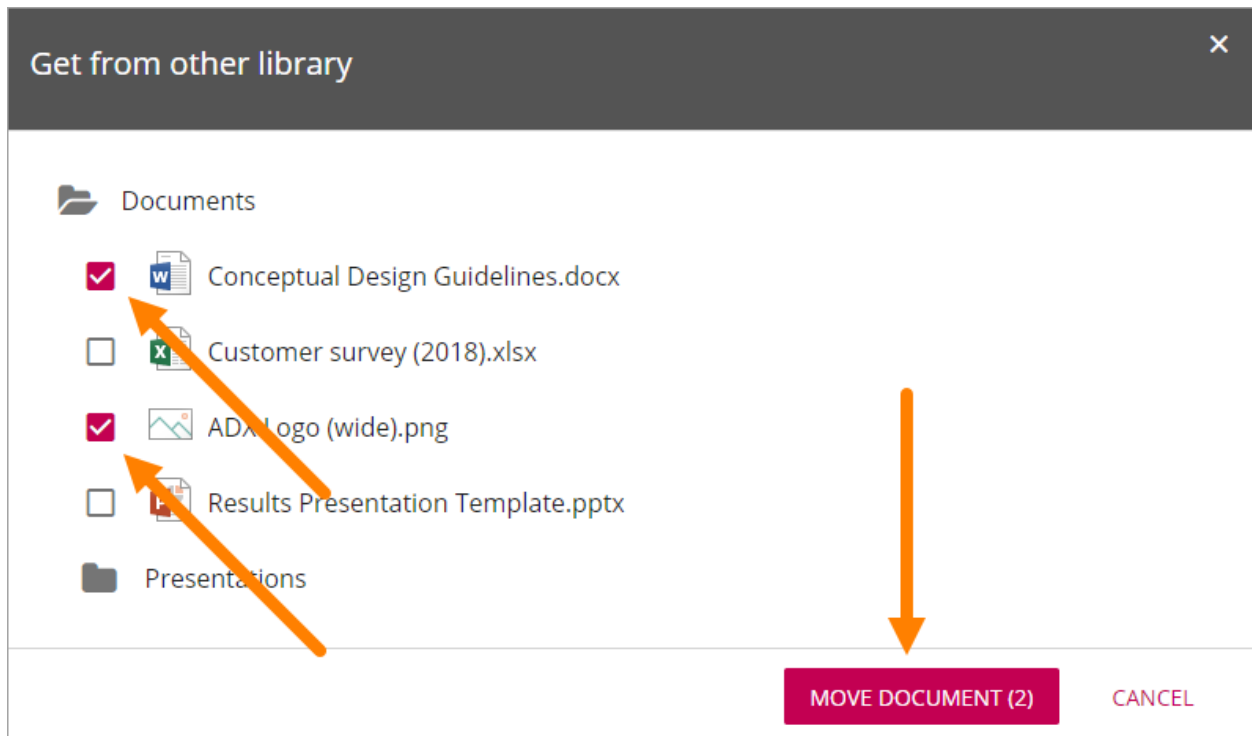
You can move a document, or several if you like, from any other Documents library in this Team Site, to the Controlled Documents library, and thus make them a Controlled Documents Draft.

Do the following:

1. Click "Add" and select "Move".
2. Open the library.



3. Open a folder if needed.
4. Select one or more documents to move.
5. Click "Get Document".



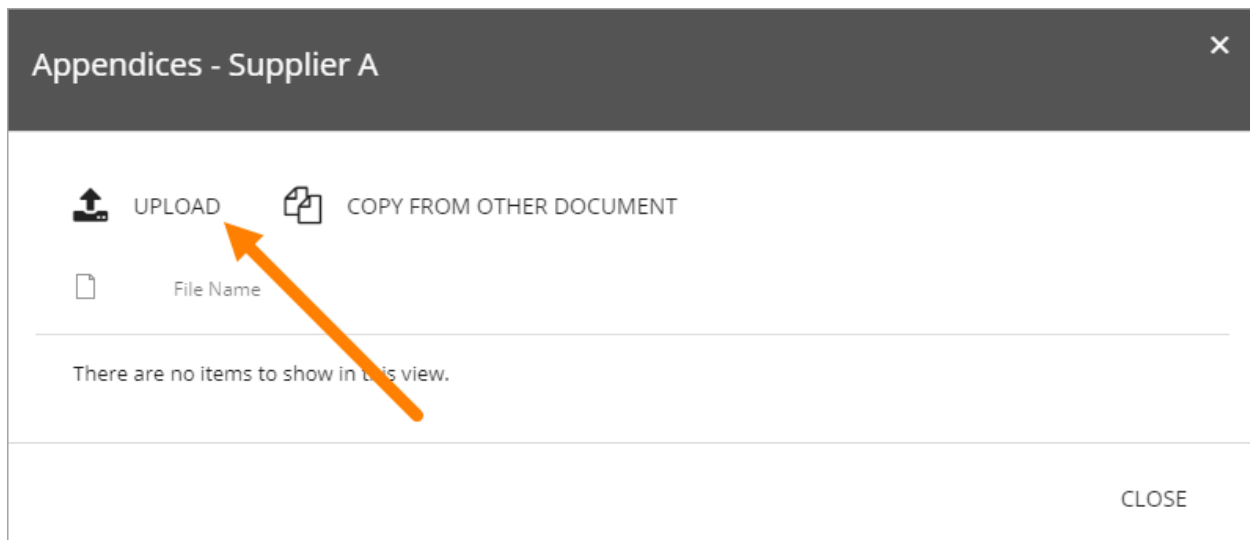
Now the selected document(s) are moved from the original Documents library and into the Controlled Documents library as drafts.

Upload Appendices

To upload documents to use as appendices to another document, the main upload option should not be used.

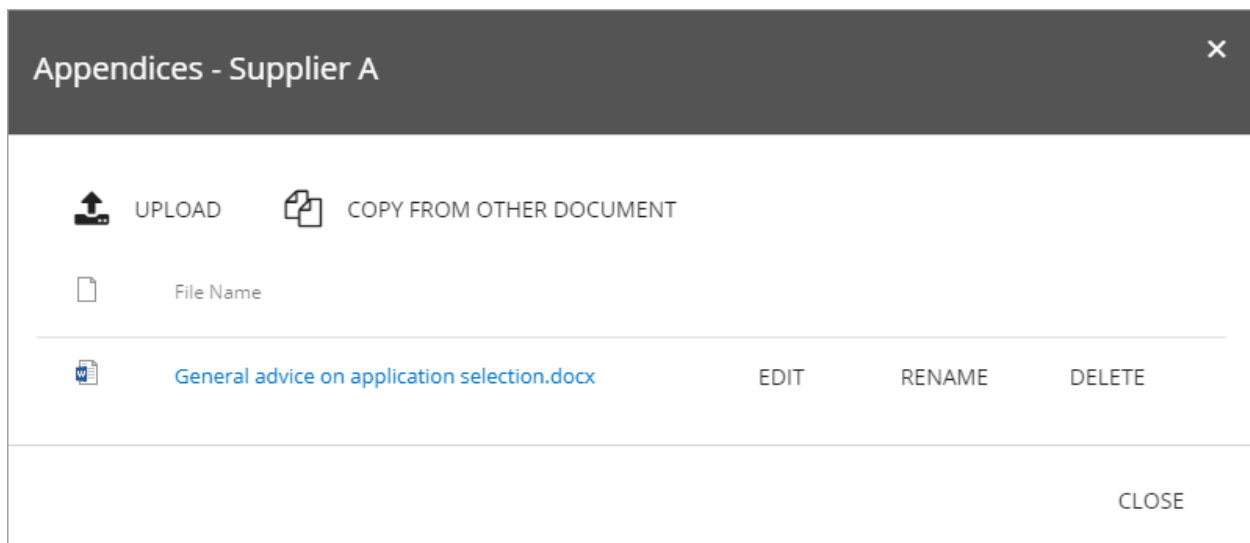
Note that status must be "Draft" for the option to be available. If a document is sent for comments or for approval, appendices can not be uploaded to that document. Also note that a Document Type contains a setting that states if appendices are allowed or not. For a document tied to a Document Type with appendices not allowed, the Appendices option is not available (gray).

1. Open the dot menu for the document to add appendices to, and select "Appendices".
2. Click "Upload" in the window shown.



3. Drag and drop one or more documents to the upload window.
4. Click “Upload Files” to start the upload.

When the upload is finished the file(s) is visible in the Appendices list for the document, for example:



“Edit” can be used to edit the content of the appendix, if the file format is editable. “Rename” can be used to change the document’s name. Use “Delete” to remove an appendix from this list.

Appendices can be added to this list continuously up to publication of the document. If appendices needs to be removed or added for a published document, a new edition of the document must be published.

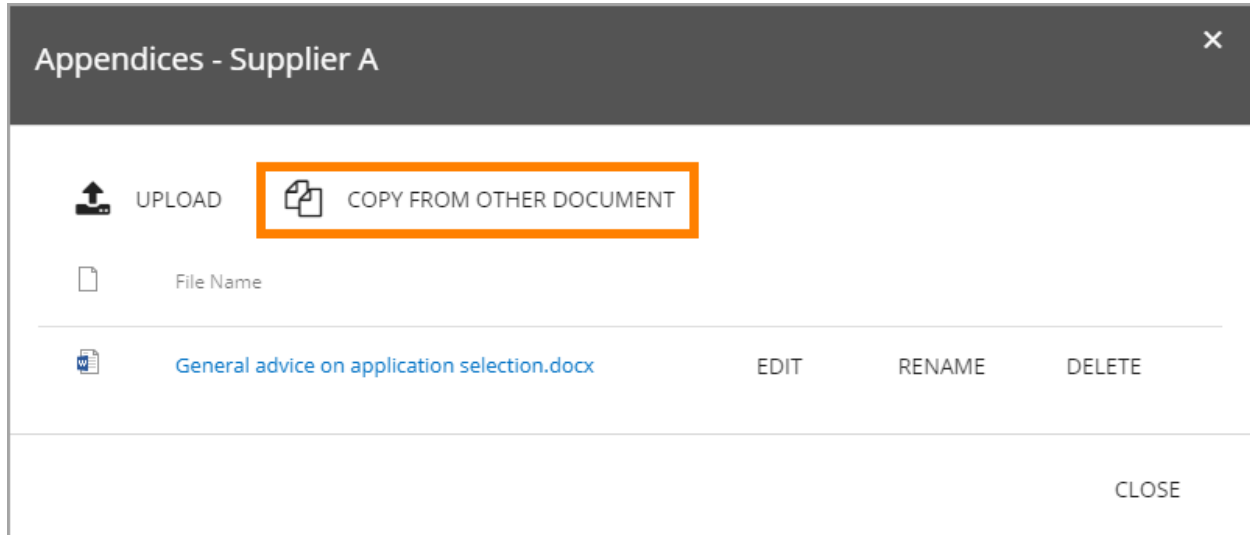
Note! An appendix uploaded as shown above will not be visible in the Drafts list, but will only exist as a part of the main document. When a document with appendices is published, both the main document and the appendices are approved in one go. The appendices does not have to be approved separately (but also see below).

Published documents as Appendices

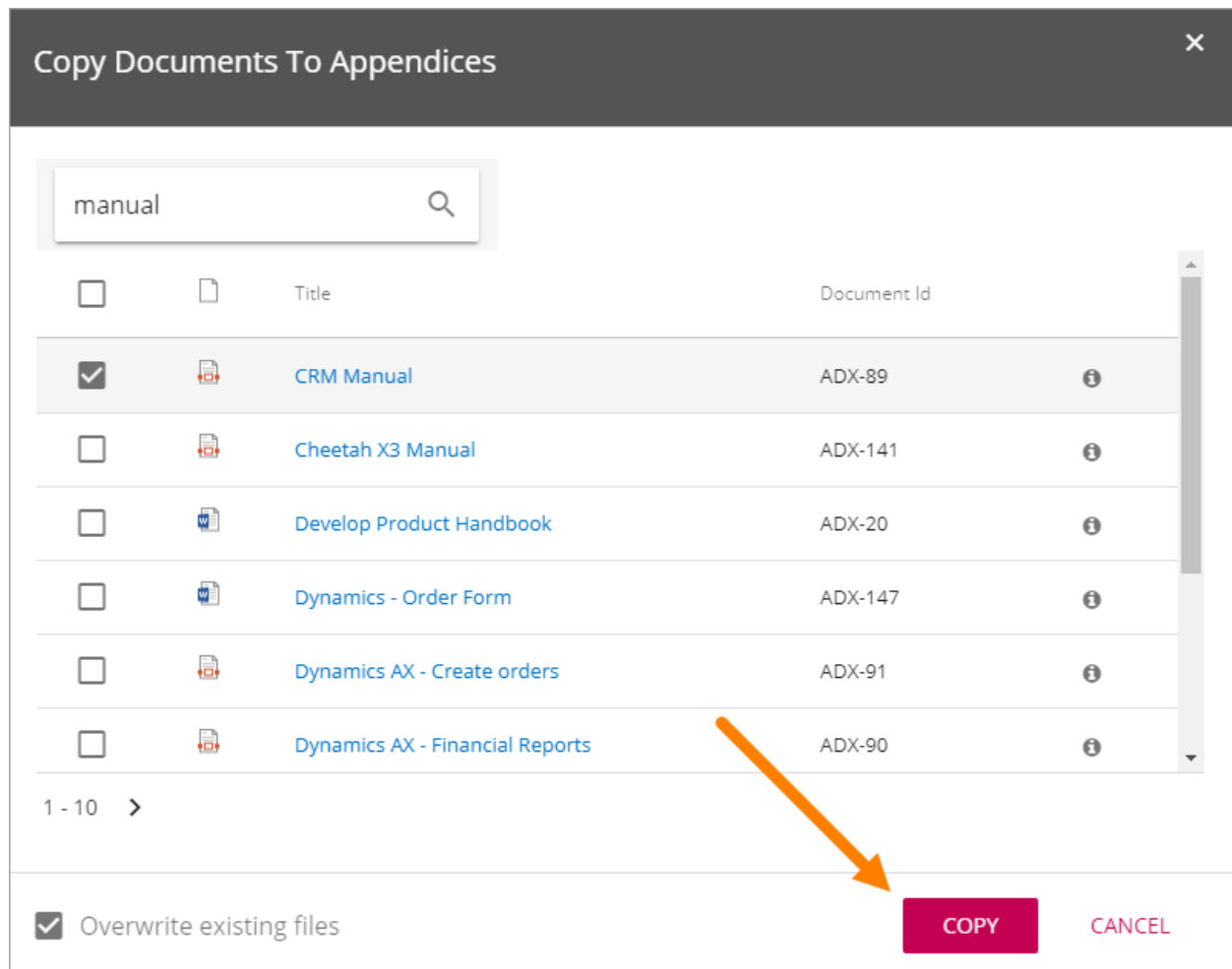
Another option is to add a copy of a published document as an Appendix. It must be a document that is published in this Controlled Documents library.

Note! In this case it is a copy of a document that will be added. There is no link between the published document and the copy, so if a new edition of the Appendice document is published, the copy used as an appendix is NOT updated.

1. Open the dot menu for the document where you want to add appendices, and select “Appendices”.
2. Click “Copy from other Document” in the window shown.



3. Search for the document.
4. Select the documents to add (a copy of) as appendices and click “Copy”, for example:















The documents added to the Appendices list this way is handled exactly the same way as a document uploaded as an appendix, see above. (And remember that it is a copy of the original document.)

Creating a new draft from a published document

The work on a draft for a new edition of a document can be started whenever it's convenient. The existing published edition is still available for readers until it's replaced, when the new edition is published.

To create a new draft of a published document, do the following:

1. Open the "Published" tab.
2. Click the dot menu for the document.
3. Select "Create Draft".

DRAFTS TASKS PUBLISHED				
Search 				
	Title	Created	↓ Published	Approved By
	Instruction Moulding frame ADX 100		2018-12-18	Robert Johnson
	Dynamics AX - Create orders		2018-12-09	Robert Johnson
	Supplier A		2018-11-13	Robert Johnson
	Managing Personal Data Policy		2018-10-09	Robert Johnson
	Dynamics - Order Form		2018-10-09	Robert Johnson
	CRM Manual		2018-10-09	Robert Johnson
	Data Management Policy		2018-10-09	Robert Johnson
	Work instruction Welding MTB		2018-07-17	Anna Karlsson
	Set up server VMWare		2018-06-25	Robert Johnson
	Order Computer Form		2018-05-07	Robert Johnson

- Create Draft
- Related Documents
- Related Processes
- Properties
- Document History
- Feedback
- Read Receipt Status
- Move Document
- Unpublish

4. Choose what is to be done:

Create Draft - Adventrix Presentation Template

Which file do you want to create your draft from?

☒ Current Edition
 ☐ Previous Edition
 ☐ Upload New File

As you see you can even upload a document to base the new draft on. This can be useful for example when you want to publish a new edition of a document you have uploaded as it is. Perhaps you have received a new version of a document from a supplier?

If you select “Previous Edition”, you can select which of the previous published editions you want to base the new Draft on. If you want to have a look at that edition before deciding, you can download a copy of the previous edition you selected in the list, by clicking this icon:

Create Draft - Adventrix Presentation Template


Which file do you want to create your draft from?

☐ Current Edition

☒ Previous Edition

☐ Upload New File

Edition 3 (2018-03-22 15:47:48)



CREATE DRAFT

CANCEL

The new draft is created and the “Drafts” tab is automatically activated. The work on the new draft is done exactly as the first time. That a document has been published before does not make any difference.

Note! There can be only one draft of a given document. If there already is a draft for the document and an author tries to create another one, a message is shown stating that it’s not possible.

New drafts and templates

If there is a new version of the template used for the document, the author will be notified and can choose to use the new version of the template, or stick to the old one.

A special case is when a new draft is created from a Word or Excel document that was uploaded rather than created from scratch. When a new draft for a second edition is created, the template can be altered (or rather selected). But using a template for an uploaded document is never mandatory, the document can always be used as is.

When selecting a template for an uploaded document, it’s always a good idea to use the preview to make sure the selected template actually works for the document.

If a template is selected, this document is from now on related to the template the same way as when a new document is created from scratch on the “Drafts” tab.

Even if a template is not selected for the second edition, the author gets a new chance the next time a new draft is created.

The Tasks tab

Using the Tasks tab you can see three different lists:

Assigned To Me

As it says, this list displays all tasks that have been assigned to you.

It can be:

- Tasks from Send for Comments workflows.
- Tasks from Publish workflows.
- Tasks for review when set Review Date has passed.

To work with a task, just click the Title. You can click the link to read the document. To see additional information about the document, click the *i* icon.

If it's a task for reviewing a document when the Review Date has passed, you check the document and can decide what to do; set a new Review Date, unpublish the document or create a new draft of the document.

Assigned By Me

This list displays all Tasks created, when you sent a document for comments or when publishing a document. To check the progress for any of the tasks, click the Title.

Completed Tasks

As it says, this tab displays a list of completed tasks. You can click the link to a task for more information, for example to see the comment(s).

More useful Options for a published document

There are some more useful options for a published document, you can for example check the Properties, see the Document History, see Feedback that users has sent and Move a document.

Related Documents

Description of this option is found here: [Related Documents](#)

Checking a document's properties

The properties for a published document can be checked this way:

1. Click the dot menu for the document.
2. Select "Properties".

The Properties window for the document is shown, for example:

Instruction Moulding frame ADX 100

×

PROPERTIESFEEDBACKREAD RECEIPT STATUS

Title

Instruction Moulding frame ADX 100

Document Id

ADX-151

Published

2018-12-18

Approved

2018-12-18


Approved By

Robert Johnson

Document Type

Work Instruction

Document Owner

 Robert Johnson

Applies To

Organization

378

Chapter 1. Topics

CLOSE

The properties can not be edited here. The properties can only be edited when working on a new edition of the document.

Document History

There's information about each published edition available. To see it, do the following:

1. Click the dot menu for the document.
2. Select "Document History".

Here's an example:

Document History - Adventrix Presentation Template ×							
Edition	Revision	Download	Appendices	Published	Comment	Approved By	
5		Adventrix Presentation Template.pptx		2019-04-12 18:26:46	Updated slide 2	Robert Johnson	Workflow History
4		Adventrix Presentation Template.pptx		2019-02-01 18:43:32	Changes to slide 2	Robert Johnson	Workflow History
3		Adventrix Presentation Template.pptx		2018-03-22 16:47:48	Demo	Robert Johnson	Workflow History
2		Adventrix Presentation Template.pptx		2017-12-12 09:35:47	Please approve version with new corporate colors.	precio fishbone	Workflow History
1		Adventrix Presentation Template.pptx		2017-09-07 13:49:08		precio fishbone	Workflow History
							CLOSE

You can see the publication date for each edition, the author's comment, if any, and who the document was approved by. The option "Workflow History" for an edition will show information about when workflows was used and the comments entered during the workflows, so here you can even see information from Send for Comments workflows used for the document.

Check Feedback

Any user can send feedback on a published document and that feedback is available for authors here. The read feedback for a document:

1. Click the dot menu for the document.
2. Select "Feedback".

The feedback posts for the document is shown. You can click the dust bin to delete the feedback when you have read it, or keep it for later reference, it's up to you.

3. To see the comments, expand a post:

Adventrix Presentation Template

PROPERTIES

FEEDBACK

READ RECEIPT STATUS

Robert Johnson

Edition: 3

2018-08-27 16:09:29

The template needs updating since we changed the logo i August.

^

Robert Johnson

Edition: 3

2018-05-22 14:32:16

v

CLOSE

Read Receipt Status

Read Receipt Status can be checked here. See this page for a description: [Read & Understood](#)

Move a published document

A published document can be moved to any other site with a Controlled Documents library. If a draft for a new edition of the document is present, the draft must first be deleted.

Note! You must first check and note (or copy) the URL to the site you want to move the document to.

1. Click the dot menu for the document.
2. Select “Move Document”.

The following is shown:

Move Document - Work instruction Welding MTB

Target Site URL

Resolved Site Title

RESOLVE

MOVE CANCEL

3. Type the URL (or paste, if you have copied it) to the site in the top field and click “Resolve”. If the URL is correct the site title is shown in the second field.
4. Click “Move”.

Unpublish

For information about this option, see this page: [Unpublish](#)

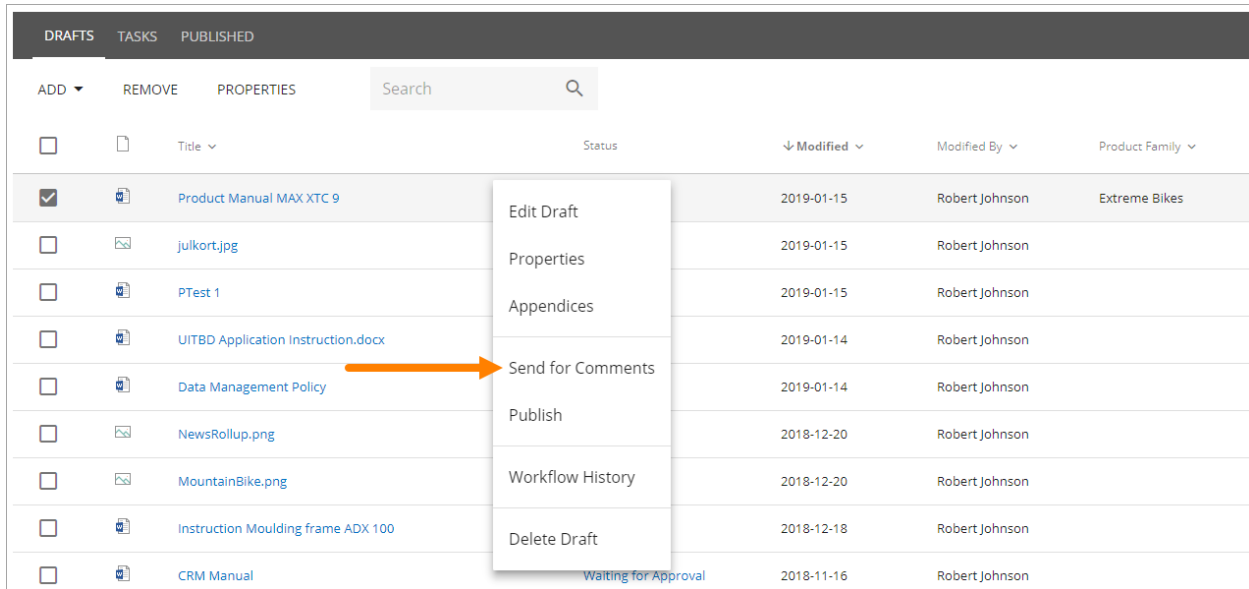
Send for Comments

Authors can use the Send for Comments Workflow to get input from one or more colleagues in an organized way, or even to get help to type some part of the text. When the Workflow is active, all users that has been added as reviewers can edit the document, regardless of what access they normally have to the site. If it's a Microsoft Word document – the option “Track changes” is automatically turned on so all comments/changes can be seen by everyone.

The option can be found in the document context menu and is called “Send for Comments”. It can be run as many times as needed before the publishing of an edition, but there can only be one such workflow active at a time, for each document. On the other hand, using this the workflow is optional. The author can always choose to publish directly.

Note! Everyone that is appointed as reviewer automatically receives edit access to the document when the workflow is active, and that access is removed when the colleague’s task is completed. Also note that publication is not allowed while a Review Workflow is active for the document.

To start the workflow, the author selects “Send for Comments” in the menu for the document, on the Drafts tab, for example:



The following is shown:

The screenshot shows the 'Product Manual MAX XTC 9' dialog box. It has a title bar with a close button. Below the title bar, there are three sections: 'Reviewers' with a dropdown menu, 'Message' with a text area, and 'Due Date' with a calendar icon. At the bottom right, there are two buttons: 'SEND' (highlighted in red) and 'CANCEL'.

- **Reviewers:** In Reviewers, all colleagues to send to (=appoint as reviewers) is added. Normally, any colleague can be added here.
- **Message:** A message to the reviewers is added here. Note that you can only use one message even if you send to several colleagues.
- **Due date:** A date when the review should be finished is entered here. It's only information to the reviewers. Nothing happens when the date is passed.

A task is then created for each colleague, and an e-mail is sent to each, with the message entered, and with a link to the document. Here's an example:

Please review the document [Miau-Product-Manual.docx](#)

QESH Team <no-reply@sharepointonline.com>
Today, 4:10 PM
Thomas Modadmin

Inbox

Action Items

Dear Thomas Min,

You have been assigned a task to review the document [Miau-Product-Manual.docx](#) in that is due 3/30/2019

1. Open the document [Miau-Product-Manual.docx](#)
2. Review the contents of the document and (if possible) make any changes and comments inside the document.
3. Open the task [Review document: Miau-Product-Manual.docx](#).
4. Add a comment to the task and click Finish.

Thomas Modadmin will be notified when the task is completed.

Thomas Modadmin 3/29/2019
"As a gear expert, please check the third section."









If Omnia Intranet is installed, the colleagues are also notified in the notification panel, about the new task, and can choose to open the task from there.

The workflow will be active until the due date of the workflow is reached, all tasks are completed or the workflow is cancelled på the author.

Check status for a Send for Comments Workflow

Status for a workflow can be checked at any time. Here's how:

1. Click the link in the column "Status".

DRAFTS TASKS PUBLISHED						
ADD ▾	REMOVE	PROPERTIES	Search 			
<input type="checkbox"/>		Title ▾	Status	↓ Modified ▾	Modified By ▾	Product Family ▾
<input type="checkbox"/>		Product Manual MAX XTC 9	Sent for Comments	2019-01-17	Robert Johnson	Extreme Bikes
<input type="checkbox"/>		julkort.jpg	Draft	2019-01-15	Robert Johnson	
<input type="checkbox"/>		PTest 1	Draft	2019-01-15	Robert Johnson	
<input type="checkbox"/>		UITBD Application Instruction.docx	Draft	2019-01-14	Robert Johnson	
<input type="checkbox"/>		Data Management Policy	Draft	2019-01-14	Robert Johnson	
<input type="checkbox"/>		NewsRollup.png	Draft	2018-12-20	Robert Johnson	

Something like the following is shown:

Product Manual MAX XTC 9 ×

Status

Sent for Comments

Due Date

2019-01-24

Reviewers

Name	Email	Reviewed	Comment
Anna Karlsson	anna.karlsson@adventrixgroup.onmicrosoft.com		
Robert Johnson	admin@adventrixgroup.onmicrosoft.com	✓	No additional changes needed. Great job!

CANCEL SEND FOR COMMENTS WORKFLOW

CLOSE

Which reviewers has finished the task and not, is shown here. For a finished task the comment entered by the reviewer is also shown. To see comments and/or changes in the document, open the document.

Cancel a Send for Comments Workflow

If needed, a Send for Comments Workflow can be cancelled, for any reason. Note that publication is not possible if a Send for Comments Workflow is active for the document. The Send for Comments workflow has to be cancelled before the Publication Workflow can be started.

1. Click the link in the column “Status”.
2. Click “Cancel Send for Comments Workflow”.

Product Manual MAX XTC 9

Status

Sent for Comments

Due Date

2019-01-24

Reviewers

Name	Email	Reviewed	Comment
Anna Karlsson	anna.karlsson@adventrixgroup.onmicrosoft.com		
Robert Johnson	admin@adventrixgroup.onmicrosoft.com	✓	No additional changes needed. Great job!

CANCEL SEND FOR COMMENTS WORKFLOW

CLOSE

Everyone in the workflow are now notified by e-mail that the workflow is cancelled. And their edit access to the document is also removed.

See Workflow History for the draft

A workflow History is available for the draft document, showing all finished or cancelled workflows for this draft version. The option is available in the menu for the document, for example:

DRAFTS TASKS PUBLISHED						
ADD ▾	REMOVE	PROPERTIES	Search			
<input type="checkbox"/>	<input type="checkbox"/>	Title ▾		Status	↓ Modified ▾	Modified By ▾
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Product Manual MAX XTC 9			2019-01-17	Robert Johnson
<input type="checkbox"/>	<input type="checkbox"/>	julkort.jpg			2019-01-15	Robert Johnson
<input type="checkbox"/>	<input type="checkbox"/>	PTest 1			2019-01-15	Robert Johnson
<input type="checkbox"/>	<input type="checkbox"/>	UITBD Application Instruction.docx			2019-01-14	Robert Johnson
<input type="checkbox"/>	<input type="checkbox"/>	Data Management Policy			2019-01-14	Robert Johnson
<input type="checkbox"/>	<input type="checkbox"/>	NewsRollup.png			2018-12-20	Robert Johnson
<input type="checkbox"/>	<input type="checkbox"/>	MountainBike.png			2018-12-20	Robert Johnson
<input type="checkbox"/>	<input type="checkbox"/>	Instruction Moulding frame ADX 100			2018-12-18	Robert Johnson
<input type="checkbox"/>	<input type="checkbox"/>	CRM Manual		Waiting for Approval	2018-11-16	Robert Johnson

Edit Draft
Properties
Appendices
Send for Comments
Publish
Workflow History
Delete Draft

Something like the following is shown:

Product Manual MAX XTC 9

PROPERTIES

WORKFLOW HISTORY

2019-01-17 14:12:30:

2019-01-17 14:18:58:

386

Chapter 1. Topics

Click the workflow to see the details, for example:

Product Manual MAX XTC 9

PROPERTIES

WORKFLOW HISTORY

2019-01-17 14:12:30:

2019-01-17 14:18:58:

2019-01-17 14:21:51: The workflow was cancelled by Robert Johnson

• Initiator: Robert Johnson

• Reviewers: Robert Johnson, Anna Karlsson

• Due Date: 2019-01-24

• Comment: All comments so far has been dealt with. Any additional changes needed?

◦ 2019-01-17 14:19:34: Task completed by Robert Johnson

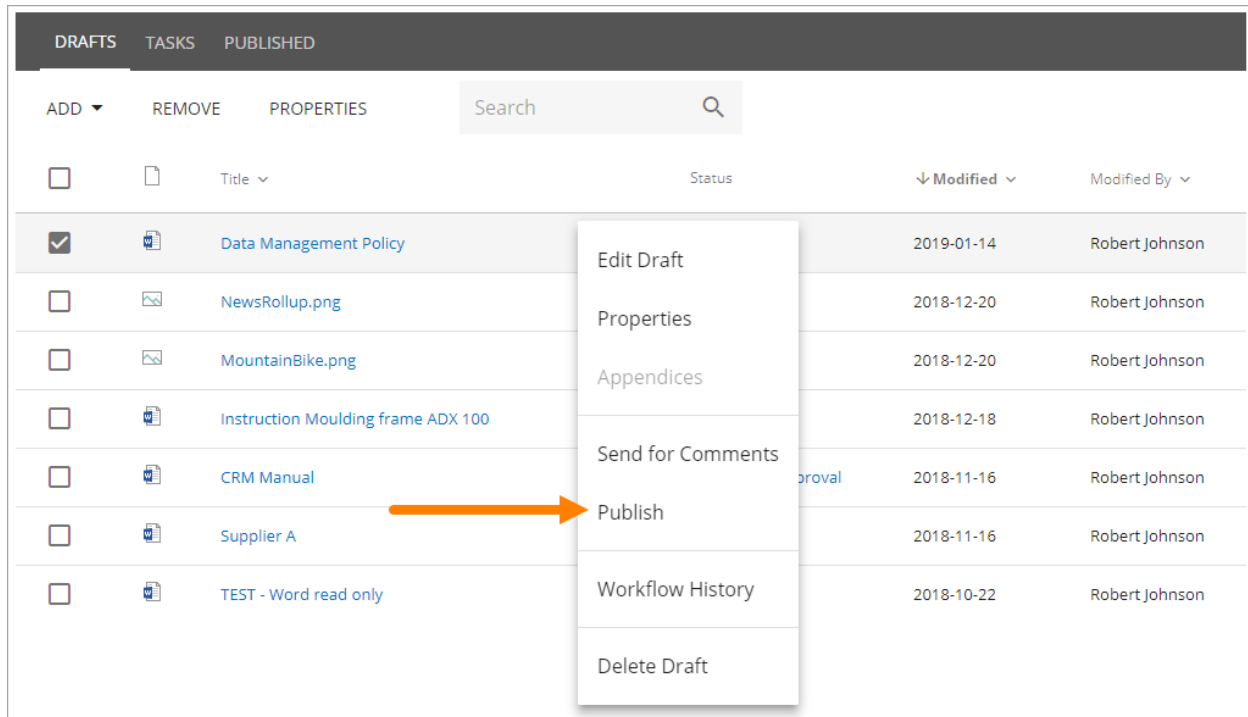
Comment: No additional changes needed. Great job!

388

Chapter 1. Topics

Approval Workflow

When a document has reached a final version, the document must be published, and, if approval is activated, be approved for publication, to be available for readers. The author then starts an Approval Workflow by selecting “Publish”.



All metadata must be properly set before the Approval Workflow is started, so the document will be available in the right lists – if applicable. Some metadata can be mandatory. If all mandatory metadata has not been added, the Approval Workflow can not be started.

Note! Metadata can also have impact on who is available as approver.

Any Send for Comments Workflow must be ended before an Approval Workflow can be started.

When the author publishes a document, something like the following is shown:

Publish Data Management Policy [X]

Approver [v]

Approval Due Date [calendar icon]

Comment [text area]

Read Rights [v]

☒ Convert DOCX to PDF


SEND CANCEL

Exactly which options are available here depends on a number of settings (All options are not shown in the image above).

- **Approver:** The author selects one approver from the list. Available approvers depends on various settings and how the system is set up.
- **Approval Due Date:** Here the author adds a date when the approval should be made, at the latest. This is just information for the approvers. The Approval workflow is not stopped if this date is passed.
- **Comment:** Use this field to add information about the approval, to be sent to the approver.
- **Read rights:** The default selection is to use the Default Readers Group from the site's permissions. If needed, the author can click "Show members" to see the permissions. A site administrator (owner) can edit the default read rights. If, for some reason, the Read Rights for this particular document should be different, the author can select "Limit Read Access", and enter the names of the readers, or any group memberships, for example AD groups.
- **Convert DOCX to PDF:** An administrator can set how this will work, in Omnia Adm, and it can be different for each Document Type – it can be available or not available. Conversion to PDF is only available for docx documents. A preview of the PDF document is available through the link (Preview document).
- **Notify people:** The author can use this option to notify certain people or groups about the new edition of the document. The notification is sent when the document is approved.
- **Require Read Receipt:** When notifying people, the author can also select this option for read receipts to be sent to the site.

When the author clicks "Send", a task is created for the approver, and an e-mail is sent, with a link to the document. Here's an example:

Approve or reject the document MTB-555-Product-Manual.docx

 Marketing <no-reply@sharepointonline.com>
 1 dag 11:03
 Anna Andersson

Inkörg



Dear Anna Andersson,

You have been assigned to a task by Jörgen Bjerkesjö to approve or reject the publishing of the document MTB-555-Product-Manual.docx, that is due [date]


1. Open the document [MTB-555-Product-Manual.docx](#)
2. Review the contents of the document.
3. Open the task [Approve document: MTB-555-Product-Manual.docx](#).
4. Add a comment to the task and select Approve or Reject.


Jörgen Bjerkesjö will be notified once your task has been completed.

The task can look like this:

 Marketing  EDIT LINKS

Document Tasks

Home
 Notebook
 Documents
 Controlled Documents
 Site Contents
 Recycle Bin
 EDIT LINKS

 MTB-550-Product-Manual.docx

Open the document and review the contents. When you are done, please write a comment in the text field below and select Approve or Reject

Comment *

The approver automatically has read access to the document (Note! Read access only), until the task is completed. If Omnia Intranet is used, the approver is also notified in the notification panel, about the new task, and can choose to open the task from there.

The workflow will be active until the task is completed and the document will be locked for editing during that time.

Approved or Rejected

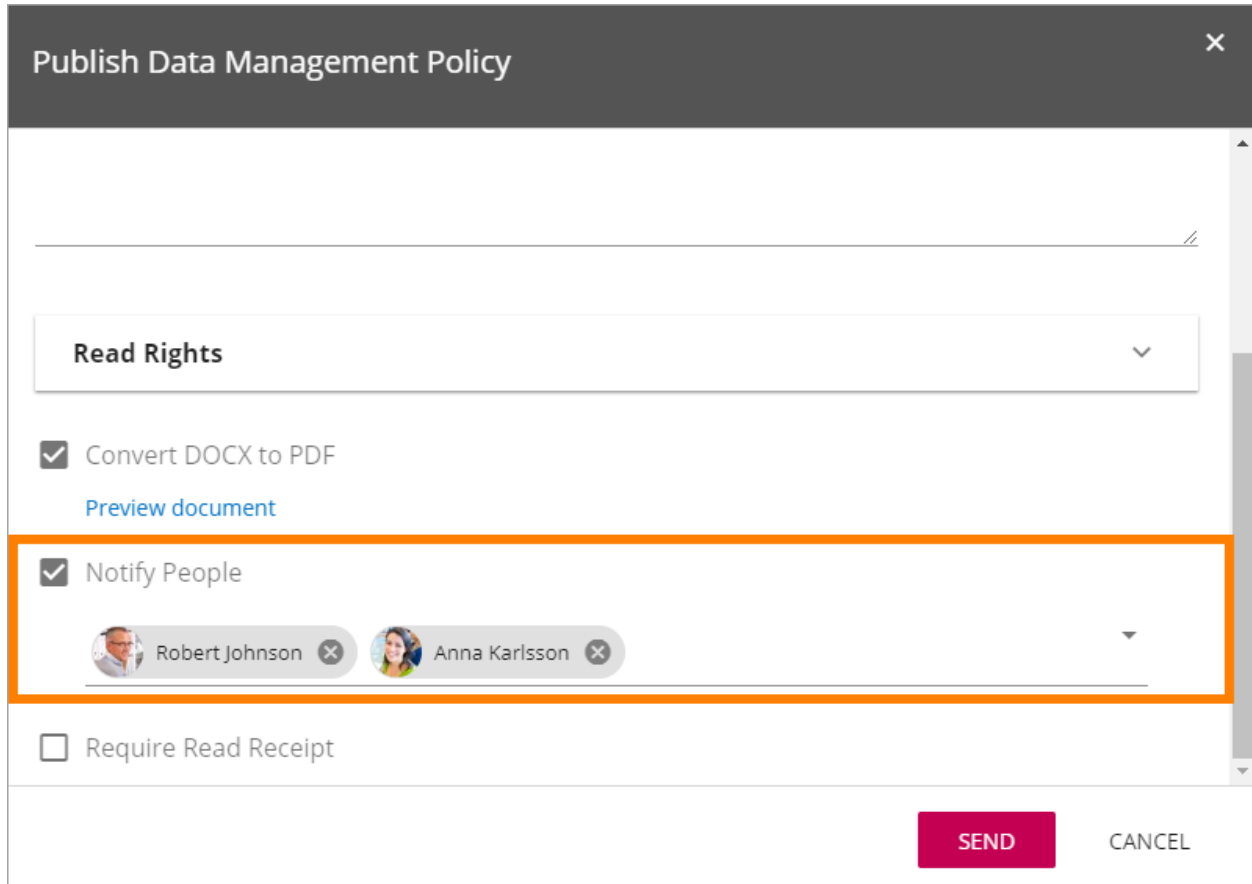
If the document is approved for publication, it's now available for readers. The author will receive an e-mail stating that.

If it's rejected, there's some changes the approver would like the author to do. The author will receive an e-mail stating that the document was rejected and a message from the approver. After changes has been made, the author starts a new Approval Workflow the same way as before.

Read & Understood

When a controlled document is published, the author can choose to send a notification to some users, and when doing so, can also choose to receive read receipts, to make sure the notification has reached them. The notifications are sent when the document is approved for publishing. Notifications are sent by e-mail and tasks are also created.

Sending notifications is always voluntary. The decision is made when the document is published. If any colleagues should be notified of the new edition, “Notify people” is selected and people or groups are then added to the field.





Publish Data Management Policy [X]

Read Rights [v]

☒ Convert DOCX to PDF
[Preview document](#)

☒ Notify People

 Robert Johnson [X]  Anna Karlsson [X] [v]

☐ Require Read Receipt

SEND CANCEL

Some notes on using groups for notifications:

- Sharepoint groups and AD groups can be used (Microsoft 365 groups can not).
- Regarding Sharepoint groups: Only Sharepoint groups within the active site collection can be used. There can not be an AD group defined in the Sharepoint group.
- Regarding AD groups (Security groups): The AD group must be e-mail enabled. Read receipts can not be used for AD groups.


To make sure recipients has received the notification, the author can select “Require Read Receipt”. (Also see above regarding AD groups.)


Publish Data Management Policy

Read Rights

☒ Convert DOCX to PDF
[Preview document](#)

☒ Notify People

 Robert Johnson

 Anna Karlsson

☒ Require Read Receipt

SEND

CANCEL

Check Read Receipt Status

Read Receipt Status can be checked for a document on the “Published” tab, this way:

1. Click the dot menu for the document.
2. Select “Read Receipt status”.

The screenshot shows the IT Department SharePoint site. The left sidebar contains navigation links: Home, Notebook, Documents, Controlled Documents, Tasks, Announcements, Calendar, Site contents, Processes, Recycle bin, and Edit. The main area displays a document list with columns: Title, Status, Published, and Approved By. A context menu is open over the 'Data Management Policy' document, showing options: Create Draft, Related Documents, Related Processes, Properties, Document History, Feedback, Read Receipt Status (highlighted with an orange arrow), Move Document, and Unpublish. The document list includes the following data:

Title	Status	Published	Approved By
Instruction Moulding frame ADX 100	Published	2018-12-18	Robert Johnson
Dynamics AX - Create orders		2018-12-09	Robert Johnson
Supplier A		2018-11-13	Robert Johnson
Managing Personal Data Policy		2018-10-09	Robert Johnson
Dynamics - Order Form		2018-10-09	Robert Johnson
CRM Manual		2018-10-09	Robert Johnson
Data Management Policy		2018-10-09	Robert Johnson
Work Instruction Welding MTB		2018-07-17	Anna Karlsson
Set up server VMWare		2018-06-25	Robert Johnson
Order Computer Form		2018-05-07	Robert Johnson

3. Select the edition to check.

A list of those that has received a notification with read receipt request is now displayed, there e-mail address and the status are shown. It can look like this:

Data Management Policy

[PROPERTIES](#)[FEEDBACK](#)[READ RECEIPT STATUS](#)

Select Edition

3 (2018-10-09)



Read Receipt Status

Username	Email	Status
Anders Fagerlund	anders.fagerlund@adventrix.onmicrosoft.com	
Anna Andersson	anna.andersson@adventrix.onmicrosoft.com	
Thomas Modadmin	admin@adventrix.onmicrosoft.com	

A green dot means that the recipient has read the message, a red that he or she has not.

Related Documents

An author can use this option to relate a controlled document to other controlled documents, as information that can be shown to document readers. This option can also be used to make sure someone, for example the document owner, will be notified when a new edition is published for any related document. Any published controlled document can be related to.

The number of related documents is shown to the right of the title, for example:

	Market Test Checklist	ADX-106	6		Robert Johnson	2018-09-28	Published
	Analyzing Test Results Guidelines	ADX-140	1		Robert Johnson	2018-08-24	Published
	Prepare for production checklist	ADX-24	7	Prepare for production	Robert Johnson	2018-08-24	Published
	Envisioning Workshop Checklist	ADX-21	12	Envisioning	Robert Johnson	2018-07-17	Published
	Project Planning Step by Step	ADX-31	5	Develop Product	Robert Johnson	2018-07-03	Published
	Planning for Prototyping	ADX-35	6	Prototyping	Robert Johnson	2018-07-02	Published
	Using the Envisioning Gallery		13	Envisioning	Robert Johnson	2018-06-25	Published
	Att leda produktutveckling	ADX-47	4	Develop Products	Anna Karlsson	2018-06-25	Published
	Workshop Leadership	ADX-34	8	Develop Product	Robert Johnson	2018-06-15	Published
	Maintenance Instruction Bauer 98	ADX-33	5	Produce Products	Robert Johnson	2018-05-30	Published

1 - 20 >

Note! Relations between documents works just one way. If document A is related to document B, that is not shown for readers of document B. If document B should be related to document A as well, that has to be added for document B.

Relate documents

Authors can relate documents using the menu for the document on the “Published” tab:

	Development Procedures	ADX-36	7	Develop Product	Robert Johnson	2018-11-09	Published
	Cheetah X3 Manual		2		Robert Johnson	2018-10-20	Published
	Market Test Checklist		6		Robert Johnson	2018-09-28	Published
	Analyzing Test Results Guidelines		1		Robert Johnson	2018-08-24	Published
	Prepare for production checklist		7	Prepare for production	Robert Johnson	2018-08-24	Published
	Envisioning Workshop Checklist		12	Envisioning	Robert Johnson	2018-07-17	Published
	Project Planning Step by Step		5	Develop Product	Robert Johnson	2018-07-03	Published
	Planning for Prototyping		6	Prototyping	Robert Johnson	2018-07-02	Published
	Using the Envisioning Gallery		13	Envisioning	Robert Johnson	2018-06-25	Published
	Att leda produktutveckling		4	Develop Products	Anna Karlsson	2018-06-25	Published
	Workshop Leadership		8	Develop Product	Robert Johnson	2018-06-15	Published
	Maintenance Instruction Bauer 98	ADX-33	5	Produce Products	Robert Johnson	2018-05-30	Published

Then a search for documents to relate to can be conducted. Here’s an example:

Cheetah X3 Manual - Related Documents



There are no items to show in this view.

☐ Notify



when a related document is updated

Cheetah



Cheetah X3 Manual



PM Cheetah



PM Cheetah (Model 200 - 300)



PM Cheetah 2



PM Cheetah 3



PM Cheetah 4



PM Cheetah 5



PM Tiger






















The i-icon can be used to see a document's properties.

Click the plus to create a relation to a document.

Any number of documents in the search result can be related to, and a new search can be conducted to relate to even more documents, if needed. The related document(s) are shown at the top, for example:

	PM Cheetah	
	PM Cheetah 2	
	PM Cheetah 3	
	PM Cheetah 4	
	PM Cheetah 5	

▼











	Cheetah X3 Manual	 
	PM Cheetah	
	PM Cheetah (Model 200 - 300)	 
	PM Cheetah 2	
	PM Cheetah 3	
	PM Cheetah 4	
	PM Cheetah 5	
	PM Tiger	 

Relations to documents are updated for the readers immediately. No new publication is needed.

Remove a related document


To remove a related document from the list, just click the dust bin for the document.




















Cheetah X3 Manual - Related Documents ×

	PM Cheetah	
	PM Cheetah 2	
	PM Cheetah 3	
	PM Cheetah 4	
	PM Cheetah 5	

☐ Notify ▼

when a related document is updated



	Cheetah X3 Manual	 
	PM Cheetah	
	PM Cheetah (Model 200 - 300)	 
	PM Cheetah 2	
	PM Cheetah 3	
	PM Cheetah 4	
	PM Cheetah 5	
	PM Tiger	 

1.6. Document Management


SAVE


CLOSE


Being notified when any related document is updated


To activate notification for related documents, select who is going to be notified. When the option is activate an e-mail is sent to the receiver every time a new edition is published for any related document.


Cheetah X3 Manual - Related Documents






 PM Cheetah

 PM Cheetah 2

 PM Cheetah 3

 PM Cheetah 4

 PM Cheetah 5



☒ Notify

when a related document is updated

Document Owner

Cheetah



 Cheetah X3 Manual

 PM Cheetah

 PM Cheetah (Model 200 - 300)

 PM Cheetah 2

 PM Cheetah 3

 PM Cheetah 4

 PM Cheetah 5

 PM Tiger

















1.6. Document Management

SAVE

CLOSE

Document Owner is always available but other person fields can also be available depending on how Omnia Document Management is set up.

Related Processes

If both Document Management and Quality Management is installed in the current Omnia tenant, editors of controlled documents can relate a published document to a process. It’s then up to the Process Owner to decide to make the document available at the process in the Process viewer, or not. That second step is done in the Process Library. For more information see the heading **The Related Documents tab*” in this page: *Process Library*.

Relate to processes

Authors can relate documents to processes using the menu for the document on the “Published” tab:

DRAFTSTASKSPUBLISHED

Search

	Title	Document Id	Edition	Status
	Adventrix Presentation Template	ADX-2	5	Published
	Market Company Organization 2018		2	Published
	Adventrix Word Template		6	Published

Create Draft

Related Documents

Related Processes

Properties

Copy Link

Document History

Feedback

Read Receipt Status

Move Document

Unpublish

The next step is to choose to relate to a processes in this site or to a site anywhere else (All sites):

If “This site” is selected, use the list to select a Process Library in this site. If “All sites” is selected, search for a Process Library by typing in the field.

Click the plus to create a relation to a Process Library.

By pointing at the icon to the right of the site name, you can see the status:

The information in this example means that the Process Owner has not yet approved the relation. The relation must be approved and the process needs to be published, before the document becomes available in the Process Viewer. The document can still be made available in other places, using a Controlled Documents Viewer.

To remove a relation to a process, click the dust bin.

1.6.3 End User



Controlled Documents Subscription



This block is used to display notifications for Controlled Documents the logged in user subscribes to, and to make it easier for the user to add additional subscriptions. The block can be added to any page but is really meant to be part of the Notification Panel.



The screenshot shows a 'Notification Panel Settings' dialog box with a close button (X) in the top right corner. It has three tabs: 'Category Settings' (selected), 'Layout', and 'Custom Colors'. In the 'Category Settings' tab, there is a list of categories on the left: 'News', 'External News', and '[New Category]' with a trash icon next to it. Below the list is a '+ Add Category' button. On the right, there are fields for 'Title' (containing '[New Category]') and 'Icon' (with a 'Browse' button). Below these is a 'View Controls' section with a dropdown menu currently showing 'Script/Html'. The dropdown menu is open, showing a list of options: 'News Viewer', 'Create Page', 'Banner', 'Important Announcements', 'User Feed', 'Controlled Documents Subscription' (highlighted with an orange border), 'RSS Reader', and 'Aggregated Calendar'. To the right of the dropdown is a '+ Add' button. At the bottom of the dialog are 'Save' and 'Close' buttons.



Here's an example of a Notification Panel block showing Controlled Documents Subscriptions:

Controlled Documents Subscription

 R&D Instructions (20) 

















 Cheetah documents (2) 

 Product Manuals (7) 

 Mountain Bikes (20) 

[ADD NEW SUBSCRIPTION](#)

The user can expand a heading to select a document in that list, for example:

 Product Manuals (7) 		
	Cheetah X3 Manual Global R & D	Robert 6 months ago 
	Product Manual A Management System	Robert 9 months ago 
	Produktmanual säljmaterial för ADX-600 Författarwebbplats för säljmaterial	Robert 9 months ago 
	Utility 11 Product Manual Global Marketing	Robert 1 year ago 
	PM Red Hawk-5 Global R & D	Robert 1 year ago 
	PM Cheetah 5 Team Product Development	Robert 1 year ago 
	Utility 11 produktmanual Global Marketing	Robert 1 year ago 

The user can add additional subscriptions by clicking “Add New Subscription” and use the following settings:

Add Subscription

Subscription Name

Subscribe to new and updated controlled documents based on the following criterias.

Document Type

Add New Criteria

Search Property

OK

CLOSE

- **Subscription Name:** Add a suitable name for the subscription here.
- **Document Type:** Enter one or more Document Types here or open the list and select them. When Document Type is selected, use the fields below to set details for what to display.

Here's an example on detailed settings to display notification about Product Manuals for the Citybike Cruising:

Add Subscription

Subscription Name

Product Manuals Cruising

Subscribe to new and updated controlled documents based on the following criterias.

Document Type

Product Manual

Search Property	Operator	
Product	Equals	Cruising

Add New Criteria

Search Property

OK

CLOSE

As mentioned, these settings are done by users. There are now settings the page author/administrator can set.

Controlled Documents Viewer

The Omnia Controlled Documents Viewer can be used on any publishing page to make certain controlled documents available for users. The control can even be used several times on the same page, for different lists of controlled documents.


Access permissions apply, the controlled documents the user can find using the control, are documents that the user has read permission to. Read permissions are handled in the team sites used by authors to publish Controlled Documents.

The Omnia Controlled Documents Viewer can be added and edited by any editor that has edit access to the page.

The user experience

Once a Controlled Documents Viewer has been added to a publishing page and set up by an editor to decide what Controlled Documents to display, any user that has access to the page can use the control to find Controlled Documents.

Normally (but this can be set, see below), at the start the list contains all documents the control has been set up to display. The refiners can be used to display only the documents tagged with a certain property value.

Document Center 

Document Type
[Work Instruction \(45\)](#)
[Product Manual \(21\)](#)
[Handbook Document \(13\)](#)
[Corporate Policy \(9\)](#)
[Corporate Template \(8\)](#)
[Show more](#)


Document Owner
[Robert Johnson \(109\)](#)
[Anna Karlsson \(14\)](#)
[Lynne Robbins \(3\)](#)
[Adele Vance \(1\)](#)


































Applies To
[R & D \(35\)](#)
[IT \(4\)](#)
[Detroit Plant \(3\)](#)
[Production \(3\)](#)
[Borås Plant \(2\)](#)
[Show more](#)

Language
[English \(117\)](#)
[Swedish \(11\)](#)


Product Family
[Kids Bikes \(19\)](#)
[City Bikes \(2\)](#)

Product
[Red Hawk \(8\)](#)
[Cheetah \(7\)](#)
[Kazam \(2\)](#)
[Utility 11 \(2\)](#)
[Mystic \(1\)](#)
[Show more](#)

Search 

↑ Title	Document Owner	Published		
 Adventrix Presentation Template	Robert Johnson	2018-03-22		
 Adventrix Word Template	Anna Karlsson	2018-02-21		
 Analyzing Test Results Guidelines	Robert Johnson	2018-08-24		
 Anti-discrimination policy	Anna Karlsson	2018-05-30		
 Arbetsinstruktion Rörläggning	Robert Johnson	2018-02-05		
 Att leda produktutveckling	Anna Karlsson	2018-06-25		
 Beställning av terminalglasögon	Robert Johnson	2018-04-18		
 Business Travel Guidelines	Robert Johnson	2018-03-15		
 Business Travel Procedures	Robert Johnson	2018-04-23		
 CRM Manual	Lynne Robbins	2018-10-09		
 Checklist for Prototyping	Robert Johnson	2018-05-09		

In this example there are 7 documents tagged with the product Cheetah and if that refiner is selected, the list could look like this:

Document Center 


Document Type
[Product Manual \(7\)](#)
























Document Owner
[Robert Johnson \(7\)](#)

Language
[English \(6\)](#)
[Swedish \(1\)](#)

Product Family
[Kids Bikes \(7\)](#)

Product
[All](#)
[Cheetah \(7\)](#)

Search 

↑ Title	Document Owner	Published		
 Cheetah X3 Manual  5	Robert Johnson	2018-10-20		
 PM Cheetah  1	Robert Johnson	2018-10-04		
 PM Cheetah (Model 200 - 300)	Robert Johnson	2018-10-04		
 PM Cheetah 2	Robert Johnson	2018-04-18		
 PM Cheetah 3	Robert Johnson	2018-05-30		
 PM Cheetah 4	Robert Johnson	2018-05-30		
 PM Cheetah 5	Robert Johnson	2018-03-21		

Search (if turned on, which is the default) can be used to search for content in the displayed documents.

The columns contain information about the documents. To the right there can be two very useful icons (if turned on, which is default).

Users can click the i-icon to display all properties for the document.

Product Documentation

Product Family
Kids Bikes

Product
Cheetah

Language
English (6)
Swedish (1)
Document Type
Product Manual (7)

↑ Title	Language	Published		
Cheetah X3 Manual 5	[object Object].en-us	2018-10-20		
PM Cheetah 1	[object Object].en-us	2018-10-04		
PM Cheetah (Model 200 - 300)	[object Object].en-us	2018-10-04		
PM Cheetah 2	[object Object].sv-se	2018-04-18		
PM Cheetah 3	[object Object].en-us	2018-05-30		
PM Cheetah 4	[object Object].en-us	2018-05-30		
PM Cheetah 5	[object Object].en-us	2018-03-21		

Here’s an example:

Cheetah X3 Manual

[Show Document History](#)[Copy Link](#)[Go to Document Library](#)

Authoring Site

Global R & D

Title

Cheetah X3 Manual

Document Id

ADX-141

Edition

3

Published

2019-05-13

Approved

2019-05-13


Approved By

Robert Johnson

Document Type

Product Manual

Document Owner

 Robert Johnson

Product Family

Kids Bikes

Product

FOLLOW

UNPUBLISH

CREATE DRAFT

CLOSE

Everyone can use the links at the top (to be able to open this window, a user must have access to the document) to see the Document History or go to the library to read the other Controlled Documents published from there.

Everyone can also choose to follow a document from here. See this page for more information about how this works: [Followed Controlled Documents](#)

If you are assigned as author to the Controlled Documents library where the document reside, you can use the buttons at the bottom to create a new draft of the documents or unpublish the document. No one else will see these buttons.

The icon to the far right...

Product Documentation

Product Family

Kids Bikes

Product

Cheetah

Language

English (6)

Swedish (1)

Document Type

Product Manual (7)

↑ Title	Language	Published		
Cheetah X3 Manual 5	[object Object].en-us	2018-10-20		
PM Cheetah 1	[object Object].en-us	2018-10-04		
PM Cheetah (Model 200 - 300)	[object Object].en-us	2018-10-04		
PM Cheetah 2	[object Object].sv-se	2018-04-18		
PM Cheetah 3	[object Object].en-us	2018-05-30		
PM Cheetah 4	[object Object].en-us	2018-05-30		
PM Cheetah 5	[object Object].en-us	2018-03-21		

... can be used to send feedback on the document.

Feedback: Cheetah X3 Manual

Normal
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SEND

CANCEL

The feedback is sent to the Controlled Documents library from where the document is published, and the authors can read it there. A mail can also be sent (depends on settings) to either the document owner or the approver.

Additional columns can be added, see below.

Settings for the control

The settings are organized in six tabs, see the sections below.

The General tab

On this tab the following settings are available:

Controlled Documents Viewer Settings

GENERAL QUERY COLUMNS FILTERS REFINERS DESIGN

Title

Search Scope

Published Documents

Default Sort Order

Sort Direction

Ascending

Page Size

20

Paging Type

Classic

☒ Show Search Box

☐ Open in Office Web Apps

☒ Open in new window

☐ Show "Subscribe To..."

SAVE

CANCEL

- **Title:** Add the title shown to users for the control.
- **Search scope:** The search scope can be either Published Documents, Draft Documents or Archived Documents. Published Document is the default. In either case, those documents lists are only those documents the logged in user is allowed to see.

- **Default Sort Order:** You can select a default sort order from the list.
- **Sort Direction:** Set sort direction - Ascending or Descending.
- **Page Size:** Set the number of documents to be shown on each “page” of the list.
- **Paging Type:** Select “Classic”, as seen in the images at the top of the page, or “Scroll”.
- **Show Search Box:** If users should be able to search the documents displayed by the control, the option should be checked.
- **Open in Office Web Apps:** If a document, when a user clicks the link, should be opened in Office Web Apps, the option should be checked. If not checked, documents will open in the full application.
- **Open in new window:** If the documents should be opened in a new window, when the user clicks a link, select this option.
- **Show “Subscribe To...”:** If the “Subscribe To” link should be displayed, helping users to subscribe to the documents that are listed in this control, select the box.

Note! Do not use “Show Subscribe To ..” for a control using filters. When a user clicks the subscribe link, the subscription added is always for the default list, no matter what filtering the user has done, making it difficult for a user to understand what he or she subscribes to.

There are two alternatives to following all documents in a list (click the links for more information):

- [*Controlled Documents Subscription*](#)
- Followed Controlled Documents (link to be added).

The Query tab

This tab is used to decide which Controlled Documents to display in the control.

Controlled Documents Viewer Settings

GENERAL **QUERY** COLUMNS FILTERS REFINERS DESIGN

☒ Query Builder ☐ Select Documents

Search Scope ▼ Equals ▼ Manual ▼ Add filter

```
{Property.Document Type}:"Product*"
```

SAVE CANCEL


- **Query Builder:** Use the Query Builder to build queries for which documents to show here. Note the example in the image.
- **Select Documents:** Use this option to select a number of documents to be shown in the control. Use search to find the documents. See the example below. Don't forget to save the selection (Save button at the bottom).


Controlled Documents Viewer Settings


GENERAL **QUERY** COLUMNS FILTERS REFINERS DESIGN


☐ Query Builder ☒ Select Documents


cheetah

☐  Cheetah X3 Manual

☒  PM Cheetah

☒  PM Cheetah 5

☒  PM Cheetah 4

☒  PM Cheetah 3

1 - 5 >

```
{Property.Document Id}:"ADX-79" OR {Property.Document Id}:"ADX-105" OR {Property.Document Id}:"ADX-116" OR {Property.Document Id}:"ADX-112"
```

SAVE CANCEL

The Columns tab

Use this tab to decide which columns to display for the list.

Controlled Documents Viewer Settings

GENERAL QUERY **COLUMNS** FILTERS REFINERS DESIGN

<input checked="" type="checkbox"/> Icon, Title and Link	auto
<input checked="" type="checkbox"/> Language	auto
<input checked="" type="checkbox"/> Published	auto
<input checked="" type="checkbox"/> Info Icon	16 px
<input checked="" type="checkbox"/> Feedback Icon	16 px
<input checked="" type="checkbox"/> Appendices Icon	auto
<input checked="" type="checkbox"/> Related Documents Icon	auto
<input type="checkbox"/> Application	auto
<input type="checkbox"/> Applies To	auto
<input type="checkbox"/> Approved	auto

SAVE CANCEL

Just select the columns to display. The options to the far right can be used to set an exact width for the column.

Some of these columns are system fields, other are property fields defined for this Document Management installation.

The Filters tab

On this tab you set filters to show in the viewer:

Controlled Documents Viewer Settings

GENERAL

QUERY

COLUMNS

FILTERS

REFINERS

DESIGN

Location

Top

No Of Columns Per Row

3

☐ Run query on no filter selection

Filter	Type
<input checked="" type="checkbox"/> Product Family	Dropdown
<input checked="" type="checkbox"/> Product	Dropdown
<input type="checkbox"/> Application	Term Picker
<input type="checkbox"/> Applies To	Term Picker
<input type="checkbox"/> Attestor	People Picker
<input type="checkbox"/> Document Id	Text Input
<input type="checkbox"/> Document Id Number	Text Input

SAVE

CANCEL

- **Location:** Select where to place the filters: Top, Left or Right.
- **No Of Columns Per Row:** Default settings is 3 columns per row. Set a different value if needed.

- **Run query on no filter selection:** If this option is selected, all documents available as per the settings on the Query tab will be shown in the list. If this option is not selected, the list will be empty until the user makes a search.
- **Filter:** Select the filter(s) to be shown, if any. Then select Type for each filter.

The Refiners tab

This tab is used to set property fields to use as refiners.

Controlled Documents Viewer Settings

×

GENERAL

QUERY

COLUMNS

FILTERS

REFINERS

DESIGN

Result Limit

100

Location

Left

No Of Columns Per Row

1

Refiner	Limit	Order by
<input checked="" type="checkbox"/> Document Type	0	Count
<input checked="" type="checkbox"/> Language	0	Count
<input type="checkbox"/> Application	0	Count
<input type="checkbox"/> Applies To	0	Count
<input type="checkbox"/> Approved	0	Count
<input type="checkbox"/> Approved By	0	Count
<input type="checkbox"/> Attestor	0	Count

SAVE

CANCEL

- **Result Limit:** Here you can set the number of documents that should be displayed in the list.
- **Location:** Select where the refiners should be placed: left, right, top.
- **No Of Columns Per Row:** Set the number of refiners that should be displayed per row.
- **Refiner:** Select the refiners to be used here and set limit and order ny to the right for each refiner.

The Design tab

Here you can set the width for the left and right zone and select colors, if needed.

Controlled Documents Viewer Settings

GENERAL

QUERY

COLUMNS

FILTERS

REFINERS

DESIGN

Left Zone

25

%

Right Zone

25

%

Background Color

#fff

Border Color

Text Color

#000

SAVE

CANCEL

Create Document Wizard

The Omnia Create New Document Wizard can be used in any site in the tenant, to create new documents, both Controlled Documents and “normal” documents, based on templates set up in the Document Management Settings. Regarding Controlled Documents a new document can even be based on any published Controlled Document.

Note! The Create Document Wizard can be set up to be available for both “normal” documents and Controlled Documents, for normal documents only, or for Controlled Documents only. This is done through settings in Omnia Admin.

When this Site feature (“Omnia Document Management Create Document Wizard”) is activated for a site, the Omnia Wizard replaces the standard options for “New” in classic document libraries and “Add” in “Controlled Documents” libraries.

The Wizard works slightly differently for Controlled Documents and for “normal” documents. Here’s an example when used for normal documents:

When used for “normal” documents the steps are as follows:

1. Select template. (You can search if the list is long.)
2. Add a title for the new document.
3. Select list of team sites: SUGGESTED, FOLLOWED or ALL. Default is the site where the wizard was started, shown under SUGGESTED. When ALL is selected, the user can search for any site the user has access to.
4. Select a team site to save the document in (in the Documents library there).
5. If applicable, select a folder in the chosen site (in the Documents library there), or create a new folder.

This means any user can use the wizard from any site where the feature is activated to create a document, and save it in the Documents library in any other site that user has access to.

Here's an example when used for Controlled Documents:

The screenshot shows a 'Create New Document' wizard window. At the top, there's a header 'Create New Document' with a close button. Below it, a checkbox labeled 'Controlled Document' is checked. The main area is divided into three columns:

- SELECT TYPE:** A dropdown menu is set to 'English'. Below it, there's a search bar with 'Product Beatsheet' and a close button. Underneath, a section 'SELECT A TEMPLATE' shows 'Adventrix Word Template'.
- PROPERTIES:** A section titled 'Title *' contains 'Product Beatsheet Lady Wheels' with a 'Show more' link. Below this are several fields: 'Document Owner' (with a dropdown arrow), 'Product Family', 'Product', 'Market Region', 'Market Country', and 'Office'. Each of these fields has a small document icon to its right.
- SELECT A LOCATION:** A section with tabs 'SUGGESTED', 'FOLLOWED', and 'ALL'. Under 'SUGGESTED', there's a button 'GR' and the text 'Global R & D'. A 'Show all' link is below this.

At the bottom right, there are two buttons: 'CREATE' (in a red box) and 'CANCEL'.

Any author of Controlled Documents can use the wizard to create a Controlled Document in any Controlled Documents library the author has access to.

When used for Controlled Documents, the steps are as follows:

To the left:

1. Select type of document to create.
2. Select a template. (You can select ALL if the template you want is not listed under SUGGESTED.)

In both cases you can search if the list is long.

In the middle:

3. Type a name for the document.
4. Add properties as needed. (This is normally very important. Properties are needed for search and for example to display documents in the correct lists.)

To the right:

5. Select the team site where the document will be saved in the Controlled Documents library.

Only team sites with a Controlled Documents library, and that the author has access to, are shown into list. Default site is where the wizard was started, shown under SUGGESTED. When ALL is selected, the user can search for any site he or she has access to.

File names for documents

If you need to check the file name for the document, when you have entered a title, click “Show more”.

Create New Document

☒ Controlled Document

SELECT TYPE English

Work Instruction

SELECT A TEMPLATE

Adventrix Word Template

PROPERTIES

Title *

Lady Wheels Work Instruction

Show more

Applies To

Document Owner

Office

Retention Date

SELECT A LOCATION

SUGGESTED FOLLOWED ALL

GR Global R & D

Show all

CREATE CANCEL

If need be, the file name can now be edited:

Create New Document

☒ Controlled Document

SELECT TYPE

English

Work Instruction

Adventrix Word Template

SELECT A TEMPLATE

Adventrix Word Template

PROPERTIES

Title *

Lady Wheels Work Instruction

File Name

Lady Wheels Work Instruction.docx

Show less

Applies To

Document Owner

Office

Retention Date

SELECT A LOCATION

SUGGESTED FOLLOWED ALL

GR Global R & D

Show all

CREATE

CANCEL

Tip - Create documents from a Controlled Documents Viewer

If set up that way, it can be possible for users to create documents from a Controlled Documents Viewer, using the Create Document Wizard. See this page for more information on how to do that: [Create a document from the Controlled Documents Viewer](#)

Create a document from the Controlled Documents Viewer

There's a very clever way of creating certain documents, which can be done directly from a list of documents, displayed in a Controlled Documents Viewer block.

If it's possible, this link is available:

Create Supplier Agreement

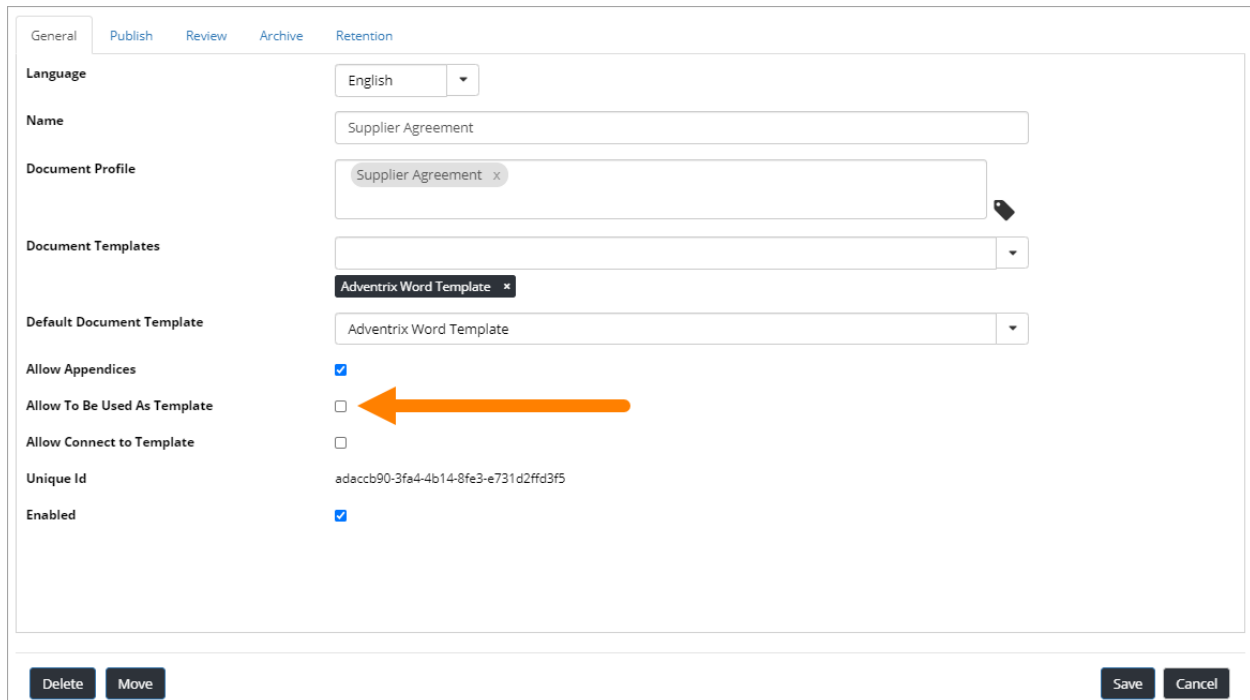
Title

Supplier Agreement Template

CREATE DOCUMENT

Settings needed

To make this possible, Document Types for templates to be used this way must be set up as “Allow To Be Used As Template”:



The screenshot shows the 'General' settings tab for a document type. The settings are as follows:

- Language:** English
- Name:** Supplier Agreement
- Document Profile:** Supplier Agreement
- Document Templates:** Adventrix Word Template
- Default Document Template:** Adventrix Word Template
- Allow Appendices:** ☒
- Allow To Be Used As Template:** ☐ (highlighted with a large orange arrow)
- Allow Connect to Template:** ☐
- Unique Id:** adaccb90-3fa4-4b14-8fe3-e731d2ffd3f5
- Enabled:** ☒

At the bottom, there are buttons for 'Delete', 'Move', 'Save', and 'Cancel'.

In a Controlled Documents Viewer that should contain such document templates, the column “Create Document Icon” must be added:

image:: doc-rollup-create.png

Then, when a Controlled Document is published that belongs to that Document Type, a user can click the link. The Create New Document Wizard starts with the template document selected.

See this page for more information on how to use the wizard: [Create Document Wizard](#)

Followed Controlled Documents

Use this block to display a list of the controlled documents the logged in user follows.

When a users reads the information about a document (available by clicking the i icon) in the Controlled Documents Viewer , the user can choose to follow the document:

Lessons Learned Guideline

Show Document History

Copy Link

Go to Document Library

Authoring Site

Global R & D

Title

Lessons Learned Guideline

Document Id

ADX-27

Edition

5

Published

2018-05-27

Approved

2018-05-27

Approved By

Robert Johnson


Document Type

Work Instruction

Applies To

R & D

Document Owner

 Robert Johnson

Office

430

FOLLOW

UNPUBLISH





CREATE DRAFT

CLOSE





Chapter 1. Topics

(A user can unfollow a document the same way, but also see below.)

The list of followed controlled documents can look like this.

Followed Controlled Documents			
	Archiving Documents Guidelines Global R & D	11 months ago	★
	Lessons Learned Guideline Global R & D	2 years ago	★
	Beställning av terminalglasögon QESH Team	2 years ago	★
	Project Alpha Directive Project Alpha	2 years ago	★

The user can unfollow a document here by clicking the star:

Followed Controlled Documents			
	Archiving Documents Guidelines Global R & D	11 months ago	★
	Lessons Learned Guideline Global R & D	2 years ago	★
	Beställning av terminalglasögon QESH Team	2 years ago	★
	Project Alpha Directive Project Alpha	2 years ago	★

Settings

The following settings are available for this block:

General

Here, you can se these settings:

Followed Controlled Documents Settings

GENERAL

CUSTOM COLORS

Day Limit

0

Row Limit per Subscription

7

View

List

☐ Open in Office Web Apps

1.6. Document Management

SAVE

CANCEL

433

- **Day Limit:** Set the number of days back the system will check if an update has happened. 0 means no limit.
- **Row Limit:** Here you can set the total number of items to show in the list.
- **View:** Select View for the list; “List” or “Grouped By Timespan”. In the example images above, List is selected.
- **Open in Office Web Apps:** When this box is selected, documents are opened in the web application. When not selected, in the installed application on the users computer.

Custom colors

Use this tab to set custom colors, if needed.

Followed Controlled Documents Settings

GENERAL

CUSTOM COLORS

Accordion Background Color

Accordion Text Color

Border Color

1.6. Document Management

SAVE

CANCEL

Accordion Background Color and Accordion Text Color are settings for the accordion used for the grouped view.

1.6.4 Setup Document Management

Prerequisites

Note! In order to be able to run any Document Management features, the extension `Omnia.DocumentManagement` needs to be installed.

Set up the Document Type term set

1. Go to the SharePoint Admin Center.
2. Click on term store in the left-hand navigation.
3. Make sure to add the Working Languages that you would like to support in the Document Management System.
Note! This is a global setting. It will affect all services dependent on the term store.

Default Language

Select the default language for all Metadata in the system. All terms must have a label defined in their default language.

English ▼

Working Languages

Select the "translation of" languages for terms in the term store. This will allow a term to have language specific labels and translations.

Select languages from:

Installed language packs ▼

French
Irish
Indonesian
Norwegian (Bokmål)

Add >>

<< Remove

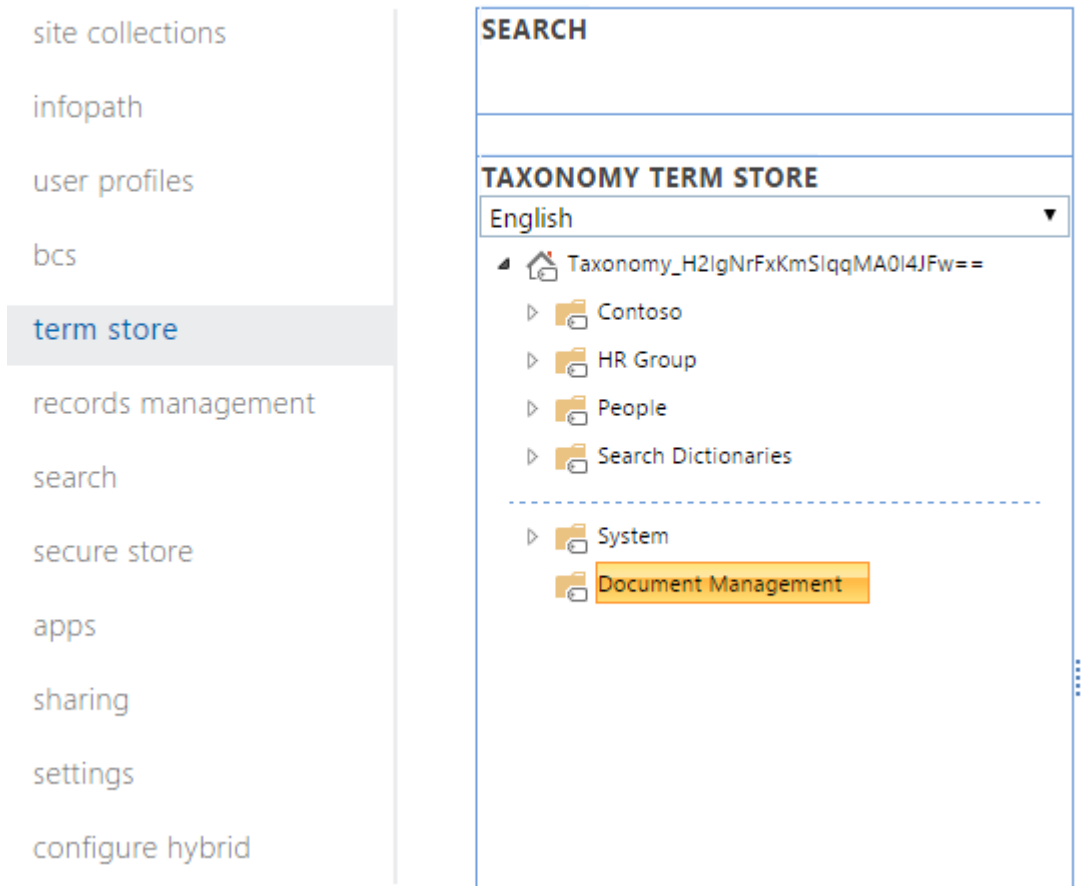
English
German
Swedish

Unique Identifier

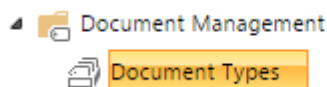
59955e2f082541a18516060b284d5788

4. Copy the Unique Identifier of the Term Store to Notepad for later use.
5. Create a new term set group for Document Management. (Recommended if you want to isolate all term sets that are explicitly part of the Document Management Solution).

SharePoint admin center



6. Create a new term set in the group for Document Types.



7. Copy the Unique Identifier of the Term Set to Notepad for later use.

Submission Policy

When a term set is closed, only metadata managers can add terms to this term set. When it is open, users can add terms from a tagging application.

☒ Closed ☐ Open

Unique Identifier

4ff10cf0-e468-4ce6-b792-75defcb53203

8. Go to Omnia Admin > System > Extensions (Note! If no publishing site collection has been set up yet, you can

access Omnia Admin through the App Catalog.)

9. Click on Omnia.DocumentManagement and fill in the properties Term Store Id and Document Types Term Set Id and click on Save.

Activate Omnia Document Management Core Tenant Feature

10. Go to Omnia Admin.
11. Activate the tenant feature “Omnia Document Management Core”.

Configure the Title Search Property


12. Go to SharePoint Admin Center > search.
13. Click on Manage Search Schema.
14. Filter on “refinablestring50”.

[Managed Properties](#) | [Crawled Properties](#) | [Categories](#)

Use this page to view, create, or modify managed properties and map crawled properties to managed properties. Crawled properties are automatically extracted from crawled content. You can use managed properties to restrict search results, and present the content of the properties in search results. Changes to properties will take effect after the next full crawl. Note that the settings that you can adjust depend on your current authorization level.

Filter

Managed property

 [New Managed Property](#)

PROPERTY NAME	TYPE	MULTI	QUERY	SEARCH	RETRIEVE	REFINE	SORT	SAFE	MAPPED CRAWLED PROPERTIES	ALIASES
RefinableString50	Text	Multi	Query	-	Retrieve	Refine	Sort	Safe		

15. Edit the managed property and map the following crawled properties.

Mappings to crawled properties

The list shows all the crawled properties that are mapped to this managed property. A managed property can get its content from one or more crawled properties.

☒ Include content from all crawled properties
☐ Include content from the first crawled property that is not empty, based on the specified order

ows_Title
TermTitle
Office:2

16. Go to Omnia Admin.
17. Go to Document Management > Search Properties.
18. Add a new Search Property for Title.

✕

Add Search Property

Localization

en-US

▼

Display Name

Title

Default Managed Property

RefinableString50

Retrievable

☒

Retrievable Managed Property

Refinable

☒

Refinable Managed Property

Queryable

☒

Queryable Managed Property

Sortable

☒

Sortable Managed Property

Related Document Property

▼

Formatting

No format ▼

OK

Cancel

19. Click on the radio button “Title Property” and save.

Title Property	Display Name	Managed Property	
<input checked="" type="radio"/>	Title	RefinableString50	

Add Search Property

Set up the Archive

20. Go to the SharePoint Admin Center.
21. Create a new site collection for the archive.

new site collection

Title

Web Site Address



Template Selection 2013 experience version will be used
 Select a language:

 Select a template:

Team Site
 Blog
 Developer Site
 Project Site
 Community Site

 A place to work together with a group of people.

Time Zone

Administrator  

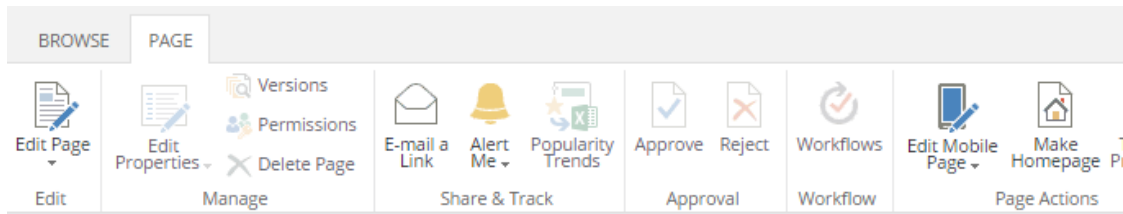
Server Resource Quota resources of 5400 resources available

22. Browse to the welcome page of the newly created site collection and copy the site url for later use.
23. Go to Omnia Admin (from this site collection).
24. Activate the site collection feature “Omnia Core Master Page”.
25. Activate the site collection feature “Omnia Document Management Archive Site”.
26. (Note! If you are using the Omnia Modern Header make sure to activate the site feature “Omnia Legacy Support Site Feature”.)
27. Go to Omnia Admin > System > Extensions.
28. Click on Omnia.DocumentManagement and fill in the property Archived Site Url.

archived site url	odm	<input type="text" value="https://mod704221.sharepoint.com/sites/cd-archive"/>	<input checked="" type="checkbox"/>
-------------------	-----	--	-------------------------------------

29. Go to Site Contents.
30. Click on ODM Archived. (If the document library is set to show the modern experience, please make sure to click on “Return to classic SharePoint”).

31. Click on “PAGE” in the ribbon and “Make Homepage”.



Built-in Search Properties

32. Go to Omnia Admin > Document Management > Document Templates.

33. Upload a blank Word document as a new Document Template.

34. Add a new temporary Document Type.

General Publish Review Archive

Language English ▼

Name Temp Document Type

Document Profile Controlled Document x

Document Templates

Blank Word Template x

Default Document Template Blank Word Template ▼

Allow Appendices ☐

Allow To Be Used As Template ☒

Allow Connect to Template ☐

Unique Id 0eb4e1eb-f434-4982-b073-eb4d5adb12b

Enabled ☒

General
Publish
Review
Archive

☒ Do not replace property placeholders with values on publishing

☐ Allow Revisions

Publishing Approval

- ☐ No Approval
- ☒ Anyone
- ☐ Limited list of users
- ☐ Term-driven
- ☐ Based on person column
- ☐ Site approvers group

Conversion

- ☒ No Conversion
- ☐ Convert DOCX to PDF

General
Publish
Review
Archive

Feedback Recipients

Approver x

☒ Review Reminder

☒ Review Interval

12

months

☐ Specific Date

Send reminder in advance

30

days

Create review task

☐ assigned to

Task expire in

days

E-mail Recipients

Approver x

[Edit Message](#)

35. Create a new team site and go to the welcome page of the new site.
36. Go to Omnia Admin > Features.
37. Activate the site collection feature “Omnia Document Management Authoring Infrastructure”.
38. Activate the site feature “Omnia Document Management Authoring Site”.
39. (Note! If you are using the Omnia Modern Header make sure to activate the site feature “Omnia Legacy Support Site Feature”.)
40. Create a new controlled document based on the Temp Document Type and Blank Word Template and publish it.

41. When the draft has been published, create a new draft of the document and then publish a second edition. (The reason for this is that we want a copy to end up in the archive.)
42. Now is a good time to grab a cup of coffee before you continue, because the search engine needs to crawl the document and it may take about 15 minutes.
43. Go to SharePoint Admin Center > Search > Manage Search Schema and map crawled properties to managed properties. (Any existing out of the box mappings on the crawled properties can be removed if not explicitly stated in the instruction below).
44. Filter on “odmdocid”.

Managed Properties | **Crawled Properties** | Categories


Use this page to view or modify crawled properties, or to view crawled properties in a particular category. Changes to properties will take

Filters

Crawled properties:

Category:

☐ Show unaltered property names



PROPERTY NAME	MAPPED TO PROPERTY
ows_ODMDocId	
ows_ODMDocIdNumber	
ODMDocId	
ODMDocIdNumber	
ows_q_NMBR_ODMDocIdNumber	ODMDocIdNumberOWSNMBR
ows_q_TEXT_ODMDocId	ODMDocIdOWSTEXT

45. Edit ows_ODMDocId and add a mapping to RefinableString51.
46. Edit ows_ODMDocIdNumber and add a mapping to RefinableInt30.
47. Filter on “ows_ODMEdition”.
48. Edit ows_ODMEdition and add a mapping to RefinableInt31.
49. Filter on “ODMDocumentType”.
50. Edit ows_ODMDocumentType and add a mapping to RefinableString52.
51. Edit ows_taxid_ODMDocumentType and add a mapping to RefinableString60.
52. Edit ows_ODMDocumentTypeId and add a mapping to RefinableInt32.
53. Filter on “ows_q_DATE_ODMPublished”.
54. Edit ows_q_DATE_ODMPublished and add a mapping to RefinableDate10.
55. Filter on “approved”.
56. Edit ows_q_DATE_ODMApproved and add a mapping to RefinableDate11.
57. Edit ows_ODMApprovedBy and add a mapping to RefinableString54.

58. Edit `ows_q_USER_ODMAppeovedBy` and add a mapping to `RefinableString59`.
59. Filter on `"ows_q_DATE_ODMReviewDate"`.
60. Edit `ows_q_DATE_ODMReviewDate` and add a mapping to `RefinableDate12`.
61. Filter on `"ows_q_DATE_ODMPublishedFrom"`.
62. Edit `ows_q_DATE_ODMPublishedFrom` and add a mapping to `RefinableDate13`.
63. Filter on `"ows_q_DATE_ODMPublishedTo"`.
64. Edit `ows_q_DATE_ODMPublishedTo` and add a mapping to `RefinableDate14`.
65. Filter on `"ows_ODMContentLanguage"`.
66. Edit `ows_ODMContentLanguage` and add a mapping to `RefinableString55`.
67. Filter on `"ows_SiteName"`.
68. Edit `ows_SiteName` and add a mapping to `RefinableString56`. (Note! Do not remove the managed property `"Site Title"`.)
69. Filter on `"ows_SPSTSiteUrl"`.
70. Edit `ows_SPSTSiteUrl` and add a mapping to `RefinableString57`. (Note! Do not remove the managed property `"SPSTSiteUrl"`.)
71. Go to Omnia Admin > Document Management > Search Properties.
72. Add a Search Property for Document Id.

Add Search Property

×

Localization	Display Name
en-US ▼	Document Id
Default Managed Property	
RefinableString51	

Retrievable	<input checked="" type="checkbox"/>	Retrievable Managed Property
Refinable	<input checked="" type="checkbox"/>	Refinable Managed Property
Queryable	<input checked="" type="checkbox"/>	Queryable Managed Property
Sortable	<input checked="" type="checkbox"/>	RefinableInt30

Related Document Property	Document Id ▼
---------------------------	---------------

Formatting	No format ▼
------------	-------------

OK

Cancel

73. Add a search property for Edition.

Add Search Property ×

Localization	Display Name
en-US ▼	Edition

Default Managed Property

RefinableInt31

Retrievable	<input checked="" type="checkbox"/>	Retrievable Managed Property
Refinable	<input checked="" type="checkbox"/>	Refinable Managed Property
Queryable	<input checked="" type="checkbox"/>	Queryable Managed Property
Sortable	<input checked="" type="checkbox"/>	Sortable Managed Property


Related Document Property	Edition ▼
---------------------------	-----------

Formatting	Integer ▼
------------	-----------

OK

Cancel

74. Add a search property for Document Type.

 Document Type ×

Localization

en-US ▼

Display Name
Document Type

Default Managed Property
RefinableString52

Retrievable ☒

Retrievable Managed Property

Refinable ☒

Refinable Managed Property

Queryable ☒

RefinableString60

Sortable ☒

Sortable Managed Property

Related Document Property

Document Type ▼

Formatting

No format ▼

OK

Cancel

75. Add a Search Property for Published.

Add Search Property ×

Localization

en-US ▼

Display Name

Published

Default Managed Property

RefinableDate10

Retrievable

☒

Retrievable Managed Property

Refinable

☒

Refinable Managed Property

Queryable

☒

Queryable Managed Property

Sortable

☒

Sortable Managed Property

Related Document Property

Published ▼

Formatting

Date ▼

OK

Cancel

76. Add a Search Property for Approved.

Add Search Property

×

Localization

en-US ▼

Display Name

Approved

Default Managed Property

RefinableDate11

Retrievable

☒

Retrievable Managed Property

Refinable

☒

Refinable Managed Property

Queryable

☒

Queryable Managed Property

Sortable

☒

Sortable Managed Property

Related Document Property

▼

Formatting

Date ▼

OK

Cancel

77. Add a Search Property for Approved By.

Add Search Property ×

Localization

en-US ▼

Display Name

Approved By

Default Managed Property

RefinableString54

Retrievable

☒

Retrievable Managed Property

Refinable

☒

Refinable Managed Property

Queryable

☒

RefinableString59

Sortable

☒

Sortable Managed Property

Related Document Property

▼

Formatting

No format ▼

OK

Cancel

78. Add a Search Property for Published From.

Add Search Property ×

Localization

en-US ▼

Display Name

Published From

Default Managed Property

RefinableDate13

Retrievable

☒

Retrievable Managed Property

Refinable

☒

Refinable Managed Property

Queryable

☒

Queryable Managed Property

Sortable

☒

Sortable Managed Property

Related Document Property

▼

Formatting

Date ▼

OK

Cancel

79. Add a Search Property for Published To.

Add Search Property

Localization

en-US

Display Name

Published To

Default Managed Property

RefinableDate14

Retrievable

☒

Retrievable Managed Property

Refinable

☒

Refinable Managed Property

Queryable

☒

Queryable Managed Property

Sortable

☒

Sortable Managed Property

Related Document Property

Formatting

Date

OK

Cancel

80. Add a Search Property for Review Date.

Add Search Property ✕

Localization

en-US ▼

Display Name

Review Date

Default Managed Property

RefinableDate12

Retrievable

☒

Retrievable Managed Property

Refinable

☒

Refinable Managed Property

Queryable

☒

Queryable Managed Property

Sortable

☒

Sortable Managed Property

Related Document Property

Review Date ▼

Formatting

Date ▼

OK

Cancel

81. Add a Search Property for Language.

Add Search Property

×

Localization

en-US ▼

Display Name

Language

Default Managed Property

RefinableString55

Retrievable

☒

Retrievable Managed Property

Refinable

☒

Refinable Managed Property

Queryable

☒

Queryable Managed Property

Sortable

☒

Sortable Managed Property

Related Document Property

▼

Formatting

Language ▼

OK

Cancel

82. Add a Search Property for Team Site.

×

Add Search Property

Localization

en-US

▼

Display Name

Team Site

Default Managed Property

RefinableString56

Retrievable

☒

Retrievable Managed Property

Refinable

☒

Refinable Managed Property

Queryable

☒

RefinableString57

Sortable

☒

Sortable Managed Property

Related Document Property

▼

Formatting

No format ▼

OK

Cancel

83. Go to Document Management > Settings.

84. Set the “Review Date Property Name” setting to “RefinableDate12”.

Setup PDF Conversion

1. Go to Omnia Admin.
2. Go to Document Management > Settings.
3. If the solution is deployed in SharePoint Online, use Office Web Access as PDF method. Set “Retry Times When Failed” to “3”.

PDF Conversion Configurations

PDF Conversion Method	Office Web Access
Retry Times When Failed	3

4. If the solution is deployed on-prem, use a custom provider. The Omnia product team has created a custom provider based on Word Automation Services. Please consult the team if you want to use that.

PDF Conversion Configurations

PDF Conversion Method	Custom
Name	Value
Endpoint Url	
Username	
Domain	
Password	
<div>Save</div>	

Setup New Document Wizard

1. Go to Omnia Admin > Document Management > Settings.
2. Change the setting “Create New Document UI for Controlled Documents” to “Modern”.

Setup Document Prefix

1. Go to Omnia Admin > Document Management > Settings.
2. Set a default Document Prefix for controlled documents. (Note! Prefix is not required.)

The screenshot shows the 'Settings' page under 'Document Management'. It contains two sections: 'Display Format' and 'Document Format'.

Display Format

Name	Value
Date Format	yyyy-MM-dd 2016-08-11
Time Format	HH:mm:ss 14:40:19

Save

Document Format

Name	Value
Document Prefix	ADX

Save

Setup Place Holders in Word and Excel

A document property place holder starts with `[[` and ends with `]]` and can be placed anywhere inside a DOCX document or within the header/footer of an XLSX document. Place holders support any document property.

Important Note! In a template you probably want the published copy of the template to include the placeholders. To ensure that the placeholders are not replaced by document properties on the template, you need to escape the placeholders using the character `\"`. An escaped placeholder would look like this:

```
\\[_PubDate\\]
```

Another, and most likely better, way is to use a dedicated Document Type for all templates and there set that the placeholders should not be replaced for documents of that type. In that case, place holders can be added as described below - escape characters are not needed. See the heading “The Publish tab” on this page: [Document Types](#) for more information.

Make sure to use the internal name (or the short name) of the property, example:

```
[[ODMPublished]]
```

You can use the following short names for built-in properties in ODM:


- `_DocId`: Document Id including prefix.
- `_DocIdN`: Document Id number only.
- `_Edition`: Edition.
- `_PubDate`: Published Date.
- `_Comment`: Edition Comment.
- `_DocType`: Document Type.
- `_ApprDate`: Approved.

- _ApprBy: Approved By.
- _Lang: Content Language:
- _RevDate: Review Date.

There's also a special Place Holder if you need to show Document History somewhere in the document:

[[_DocHistory]]

On publication this Place Holder will be replaced with a table listing all editions, for example:



Anti-discrimination policy		Type Corporate Policy	Doc. Id ADX-51
Approved 2019-04-15 by Robert Johnson	Owner Anna Karlsson	Revision date 2020-04-15	Edition 5

Document History

Edition	Revision	Published	Comment
5		2019-04-15	Changes to chapter 4 to align with new discrimination laws.
4		2018-05-30	Republished by system. Property "Document Owner" updated. "Robert Johnson" replaced with "Anna Karlsson".
3		2018-03-09	Changes to section 1.2
2		2018-02-21	Convert to PDF.
1		2018-02-21	

If you want dates to be displayed with the appropriate format you can use the following syntax for date and date including time:

[[_PubDate|Date]]

[[_PubDate]]

Tip: If you want to prevent authors from deleting place holders within the document (for example in a header), you can put them inside locked content controls added using the “Developer” tab in Word.

Setup Legacy Web Parts

If you need to support legacy web parts, please follow these steps to deploy the web part definitions for all document management web parts.

1. Go to the start page of the main publishing site.
2. Go to Omnia Admin > Features.

3. Activate the site collection scoped feature “Omnia Document Management Web Parts”.

Setup Integration with Omnia QMS

Note! In order to be able to run the integration with Omnia QMS, the extension Omnia.QMS needs to be installed.

1. Go to Omnia Admin > System > Extensions.
2. Click on Omnia.DocumentManagement and set the values:
 - qms enable: true
 - qms web api url: Example: <https://omniacloud-qm.azurewebsites.net>

Notes on upgrading Document Management

When upgrading Document Management to Omnia for Microsoft 365 you must be aware that Document Management (as well as Process Management) now uses Single Part App Page to display the controlled documents and process library respectively. No other web parts can be added to the page.

You can find more information on this Microsoft page: <https://docs.microsoft.com/en-us/sharepoint/dev/spfx/web-parts/single-part-app-pages?tabs=pnpposh>

This means that additions that eventual extra web parts carried in Omnia for Sharepoint must be added some other way.

1.7 Quality Management



1.7.1 Administrator

Settings

The author(s) of a process can handle user feedback on the tab “Deviation/Improvement”, when working with the process.

Here, an administrator can check the status of feedback for processes in the tenant, to make sure that feedback postings are being handled. The columns “Status” and “Date” are two important columns to check in that respect, see below.

Note! The administrator needs to have at least read access, for the process to show up in the list here.

 QMS »  Deviations / Improvements

Search

Type

Status

Responsible

Date from

To date

Clear

Export

Title	Type	Status	Date ↓	Responsible	Process
Improvement suggestion regarding Market Tests	Improvement	Suggestion	2018-08-24		Develop Product
Avvikelse i produktutvecklingsprocessen	Deviation	In Progress	2018-06-11		Develop Product
Project Closure	Improvement	Suggestion	2018-05-31		Develop Product
Article review not being done	Deviation	Suggestion	2018-05-23		Write Article
Great keyword reference site	Improvement	Suggestion	2018-05-17	Adele Vance	Write Article
Add mobile phone list	Improvement	Suggestion	2018-04-20		IT Onboarding New Employee
More information needed	Improvement	In Progress	2018-03-23	Lynne Robbins	Idea Management
Risk regarding Market Tests	Risk	Suggestion	2018-03-22		Develop Product
Risk XYZ	Improvement	In Progress	2018-02-05	Anna Karlsson	Procure Goods
Improvement ABC	Improvement	Suggestion	2018-02-05	Anna Karlsson	Quality Control

“Search” is used to search the list; “Type”, “Status”, “Responsible”, “Date from” and “Date to” to filter the list. An example: to check the progress of all feedback postings labeled Risk, select “Risk” under “Type”.

Click “Clear” to show the full list after searching or filtering. Use “Export” to export the list to an Excel file.

The columns contain the following information:

- **Title:** The user enters a title when sending the feedback. A process author can edit the title.
- **Type:** Type of feedback is shown here. It can be Improvement, Deviation or Risk. The user sending the feedback selects a Type. A process author can change type.
- **Status:** The Status is shown here. When a user sends a feedback posting, the Status will be “New”. The author handling the feedback can change the Status to “Suggestion”, “In progress”, “On hold” or “Closed”.
- **Date:** The Date when the user sent the feedback is shown in this column, the latest at the top. Click the heading to sort the list with the oldest at the top.
- **Responsible:** If someone is named as Responsible for this feedback, by any of the process authors, the name will be shown here.
- **Process:** For a closer look at the process, click the link here. The administrator can work with the feedback for the process if he or she has the right permissions, if needed.

For more information about how to work with feedback for a process, see: [Deviations/Improvements](#)

Templates

It's possible to create a Process Site Template from a process. The template can then be used to create team sites the normal way. Documents linked to the list of actions will then be set up in the team site created from the template.

To select a process as the template, use the option "Process Site Template" on the "Advanced" tab in the Processes library.

Configure status

When creating a process template it is possibility to configure a number of available statuses on a process step.

The screenshot shows the 'Configure status' page for a process template. The page has a top navigation bar with 'ACTIVE', 'ARCHIVED', and 'ISSUES' tabs. Below this, there's a breadcrumb trail: 'All processes > Develop Product'. On the right, it shows 'Edition: 13' and 'Revision: 1', along with 'EDIT' and 'PUBLISH (1)' buttons. The main content area has tabs for 'GRAPH', 'GENERAL', 'CONTENT', 'RELATED DOCUMENTS', 'TOOLS', and 'ADVANCED'. The 'ADVANCED' tab is selected, showing a configuration table for process statuses.

Status	Background color	Selected Background color	Text color	Selected Text color
Not Started	✓	✓	✓	✓
In Progress	Yellow circle	Yellow circle	Black circle	Black circle
Completed	Green circle	Green circle	White circle	White circle
Deferred	Red circle	Red circle	White circle	White circle

Additional settings shown: Viewer ID 342, Modified 2019/04/15, Show in Process Directory Yes, Process Site Template Project, Review interval 12 months.

This configuration can then be used on a team site to set status on process steps for this specific process instance.


Manage Project > Initiate > Set High-level Scope

The screenshot shows the 'Set High-level Scope' process step configuration page. At the top, there's a breadcrumb trail: 'Manage Project > Initiate > Set High-level Scope'. Below this, there's a process flow diagram with five steps: 'Identify needs', 'Identify stake', 'Set High-level Scope' (current step), 'Suggest Org...', and 'Create Business...'. The 'Set High-level Scope' step is highlighted in blue. Below the flow diagram, there's a table with columns: 'DESCRIPTION', 'DOCUMENTS', 'TOOLS', 'TASKS', and 'DETAILS'. The 'DETAILS' tab is selected, showing a table with columns: 'Version', 'Info', and 'Status'. The 'Status' column has a dropdown menu open, showing options: 'Not Started', 'In Progress' (selected), 'Completed', and 'Deferred'. On the right side of the page, there's an 'ADD FEEDBACK' button and a 'PROJECT CENTER' button.

1.7.2 Author

Process Library

The Process library is where members of the team site creates new processes and edit existing ones, and where processes are published so others can see them.

ACTIVE ARCHIVED DEVIATIONS/IMPROVEMENTS					
NEW		FILTER ▼		Search 	
Name ↑	Edition	Revision	Modified	Owner	Tags
Develop Product	12	2	2018-12-18	Robert Johnson	
Develop Products	11	13	2018-10-23	Robert Johnson	
Idea Management	1	3	2019-01-15	Robert Johnson	
OSM process	1	1	2019-01-15	Robert Johnson	
Procure Goods	3	0	2018-03-14		Management
Produce Products	2	0	2018-11-08		Production
Quality Control	2	2	2019-01-15		Management

A published process is made available through a Process Viewer, see [Process Viewer](#)



Published processes can also be made available through a Process Directory, see [Process Directory](#)

All processes

The main list (see image above) displays a list of all processes in this process library. Click any process for details or to start editing the process.

You can click the headings “Name”, “Edition”, “Revision”, “Modified” and “Owner” to switch between ascending and descending sort order.

Use the following options to filter the list and more:

ACTIVE ARCHIVED DEVIATIONS/IMPROVEMENTS					
NEW		FILTER ▲		Search 	
		Owner ▼		Tags 	
Name ↑	Edition	Revision	Modified	Owner	Tags
Develop Product	12	2	2018-12-18	Robert Johnson	
Develop Products	11	13	2018-10-23	Robert Johnson	
Idea Management	1	3	2019-01-15	Robert Johnson	
OSM process	1	1	2019-01-15	Robert Johnson	
Procure Goods	3	0	2018-03-14		Management
Produce Products	2	0	2018-11-08		Production
Quality Control	2	2	2019-01-15		Management

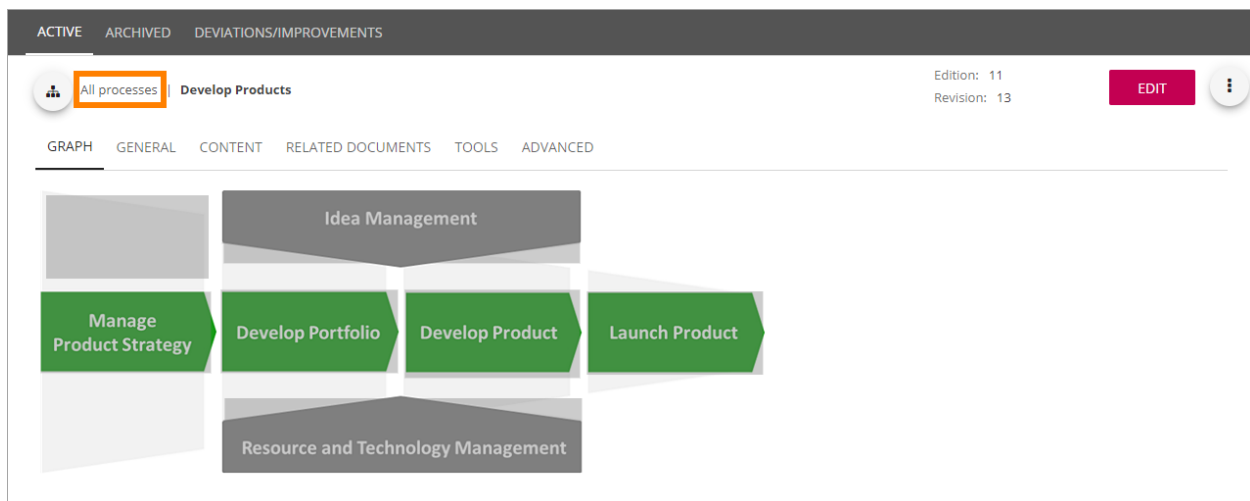
- **Search:** Filter the list by process names. All processes that contain the letters you have entered, somewhere in the process name, are shown.
- **Owner:** Filter the list on an owners name.
- **Tags:** Filter the list on one or more of the available tags.

Note that these filters are cumulative. An example: if you filter on a process name and a tag, a process must contain the letters in the name AND be tagged with the tag you have chosen, to be shown in the list.

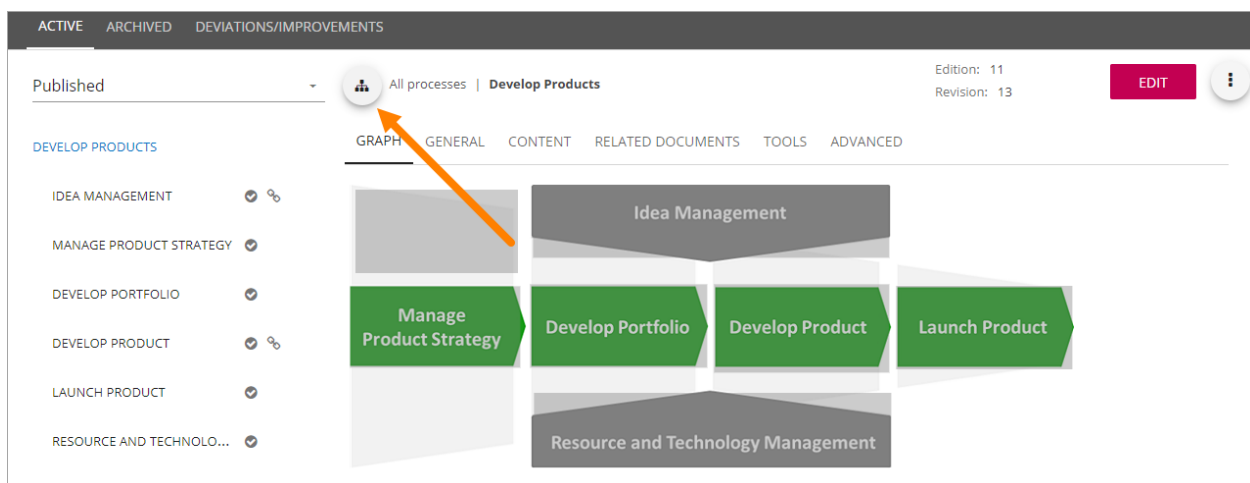
- **New:** Create a new process by using this button. See below for more information.
- **Archived processes:** To see the list of archived processes, click this link. See below for more information.
- **Deviations/Improvements:** Use this option to work with deviations and improvements.

Navigate between processes

When you have selected a process you can go back to the main list by selecting “All processes” in the upper left corner.



You can go to another process in the left navigation. Click the button to open the left navigation.



Click the button again to close the left navigation.

Create a new process

To create a new process:


1. Go to the Processes library and click “New”.

The following is shown:

Create process

Name

Owner

 Robert Johnson

✕

▼

Graph type

☒ Shape

☐ Custom Image

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CREATE

CANCEL

2. Enter a name for the process.
3. Add or delete owners if needed.
4. Choose if you are going to use the shapes from the Omnia QMS library or a custom image.

If you choose to use a custom image, click “Select Image” and find and open the image.

5. Click “Create”.

Important note on custom images

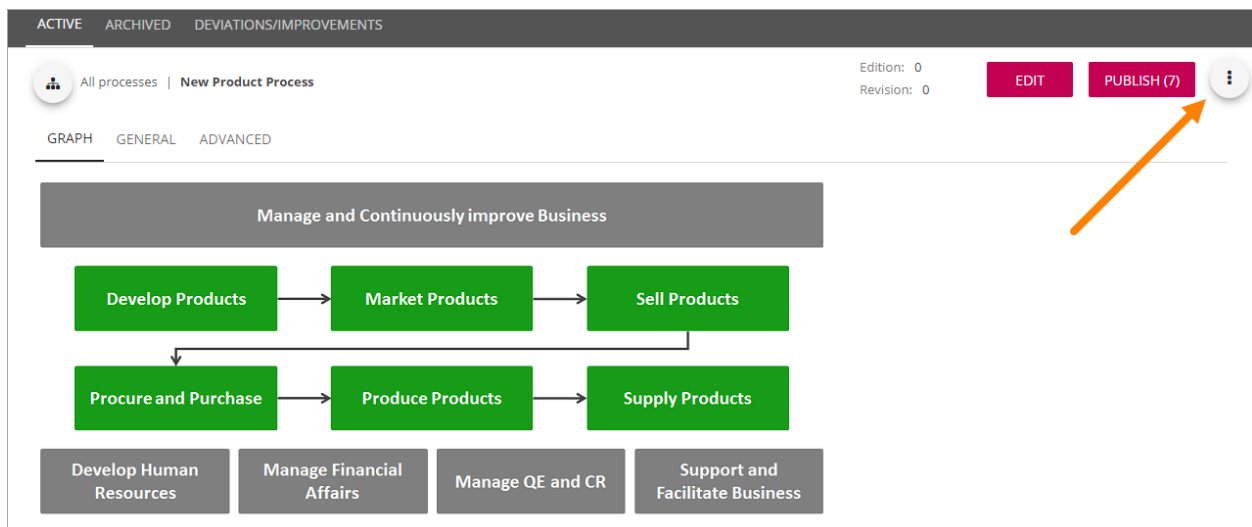
A custom process image with image maps will have a draft status and a published status. The images are stored in the local team site, not in a global image bank (but can be uploaded to the process from any source available).

When editing a process, a new image can be uploaded to replace the existing custom image. The image maps will remain in place, but can of course be edited.

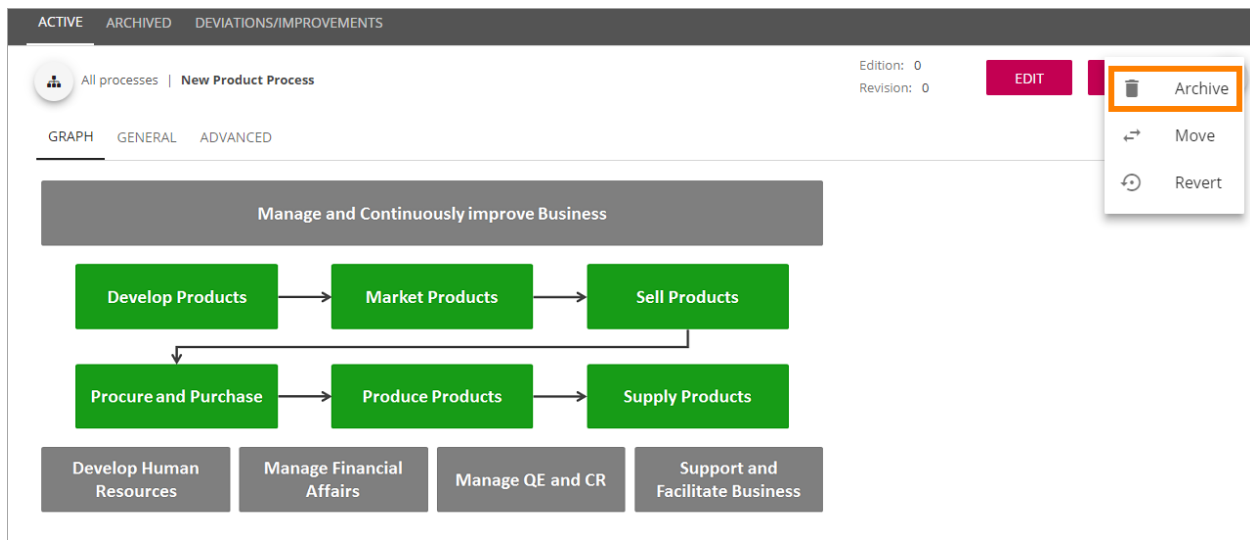
When a custom image is replaced, you always need to publish to make the changes visible for end users.

Archived processes

A process that no longer is used can be archived, so it's not shown in the main list. Open the menu to the right:












..and select “Archive” when editing the process.












Note! An archived process can not be published. A published process is automatically unpublished when you select to archive the process.

ACTIVE ARCHIVED DEVIATIONS/IMPROVEMENTS					
NEW					
FILTER Search					
Name ↑	Edition	Revision	Modified	Owner	Tags
Develop Product	12	2	2018-12-18	Robert Johnson	
Develop Products	11	13	2018-10-23	Robert Johnson	
Idea Management	1	3	2019-01-15	Robert Johnson	
OSM process	1	1	2019-01-15	Robert Johnson	
Procure Goods	3	0	2018-03-14		Management
Produce Products	2	0	2018-11-08		Production
Quality Control	2	2	2019-01-15		Management

A list of archived processes can be reached by clicking the link “Archived processes” in the main list, see above. Here’s an example of a list of archived processes:

ACTIVE ARCHIVED DEVIATIONS/IMPROVEMENTS			
			Search 
Name	Latest change date↓	Owner	
New Product Process	2018-11-08	Robert Johnson	
Test process	2018-10-08	Robert Johnson	
Demo Process TSC	2018-09-17	Robert Johnson	
Idea Management	2018-03-23	Robert Johnson	
Idea Management	2018-03-20	Robert Johnson	
Idea Management	2018-03-20	Robert Johnson	
Idea Management	2018-03-20	Robert Johnson	
Training Process	2018-03-14		

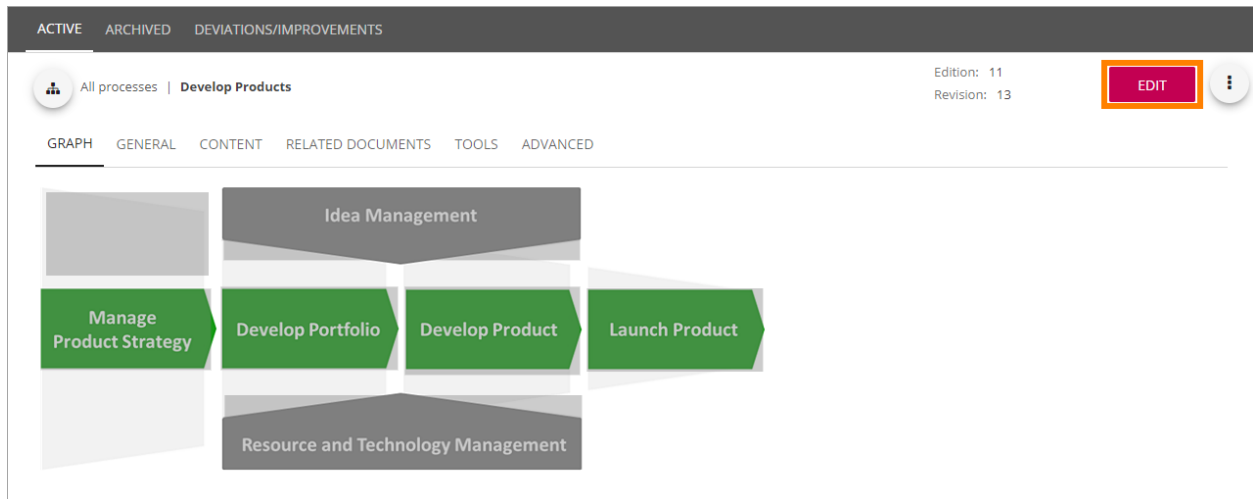
You can search the list and sort it by using the headings. A process can be restored by clicking the icon to the far right, and thus be available in the main list for editing and publishing.

ACTIVE ARCHIVED DEVIATIONS/IMPROVEMENTS			
			Search 
Name	Latest change date↓	Owner	
New Product Process	2018-11-08	Robert Johnson	
Test process	2018-10-08	Robert Johnson	
Demo Process TSC	2018-09-17	Robert Johnson	
Idea Management	2018-03-23	Robert Johnson	
Idea Management	2018-03-20	Robert Johnson	
Idea Management	2018-03-20	Robert Johnson	
Idea Management	2018-03-20	Robert Johnson	
Training Process	2018-03-14		

Edit a process

You edit a newly created process and an existing one the same way. Note that access mode is read only until you click “Edit”.

1. Open the process from the list, if it’s not already open.
2. Click “Edit”.



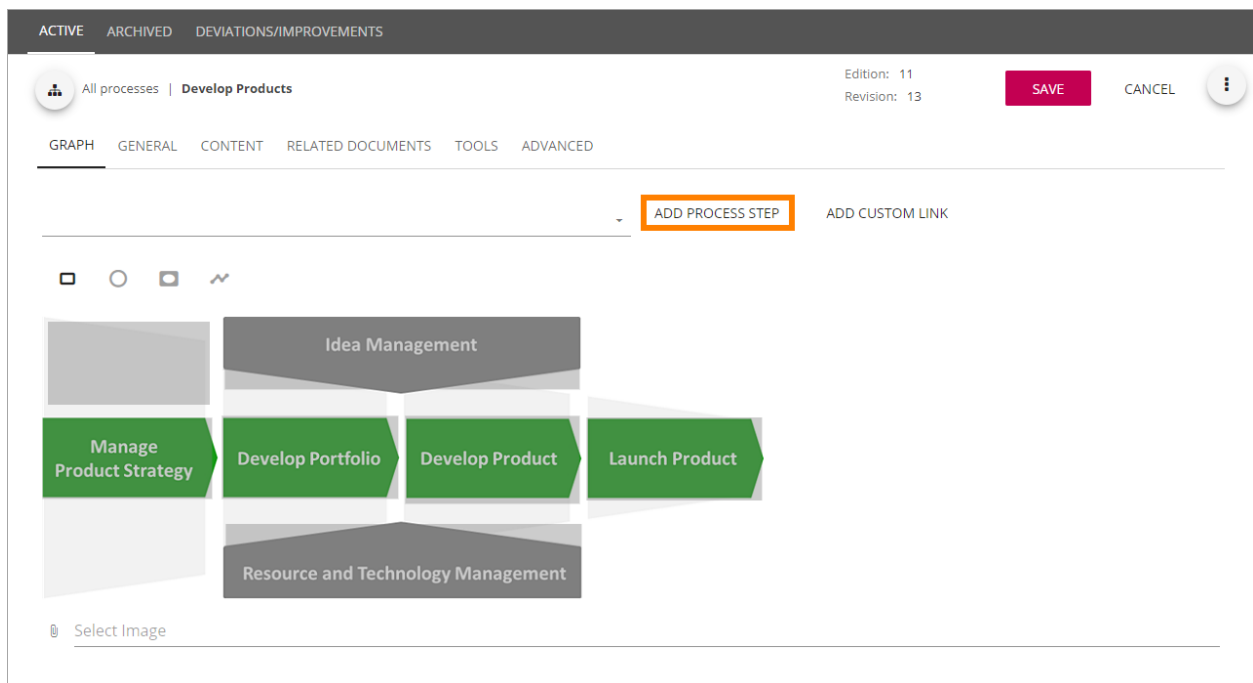
The Graph tab

Use this tab to work with the graphical presentation.

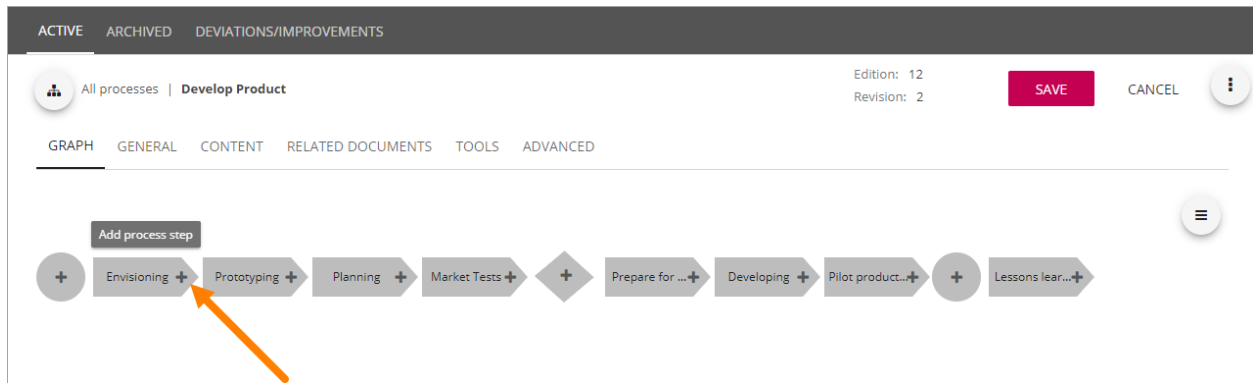
Add a new process step

To add a new process step, do the following:

1. Click “Add process step”



or “Add new process step” - the plus - in any step where you want to create a new step.



The following is shown (some options may not be shown, depending on where in the process you add something):

Develop Product

×

Type

Activity

Name

Shape

Pentagon

Position

After

Envisioning

CREATE

CANCEL

- **Type:** Type can be Process or Activity. When you select “Process”, a second list, where you can choose to create a new Process, a Sub Process, or a Linked Process, is shown.

Develop Product

×

Type

Process

Link to Existing Process

Create New Process

Create Sub Process

☒ Shape

☐ Custom Image

Position

After

Envisioning

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CREATE

CANCEL

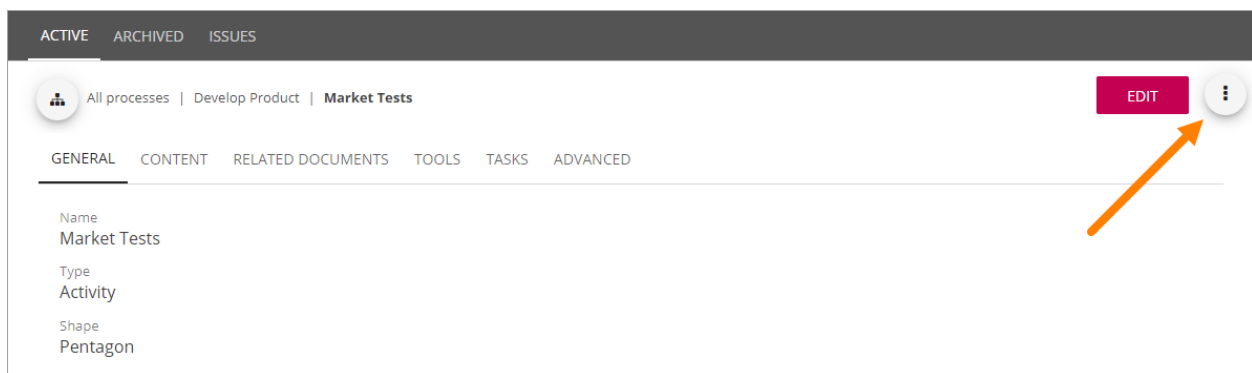
“Activity” is the end of the process or sub process, where you add actions. For an Activity you select which shape to use. When you select “Linked process” you add the link to that process.

- **Name:** Enter a name for the step here.
- **Shape:** Select shape for the process step here. For a “Sub Process” you can choose to use to use Shapes or a Custom image. A sub process can have other sub processes, activities or links to other processes.
- **Custom image:** When creating a sub process or a new process, you can use a custom image.
- **Position:** Select position for the new step, in relation to the step where you selected to create the new step - After, Before or Parallel.

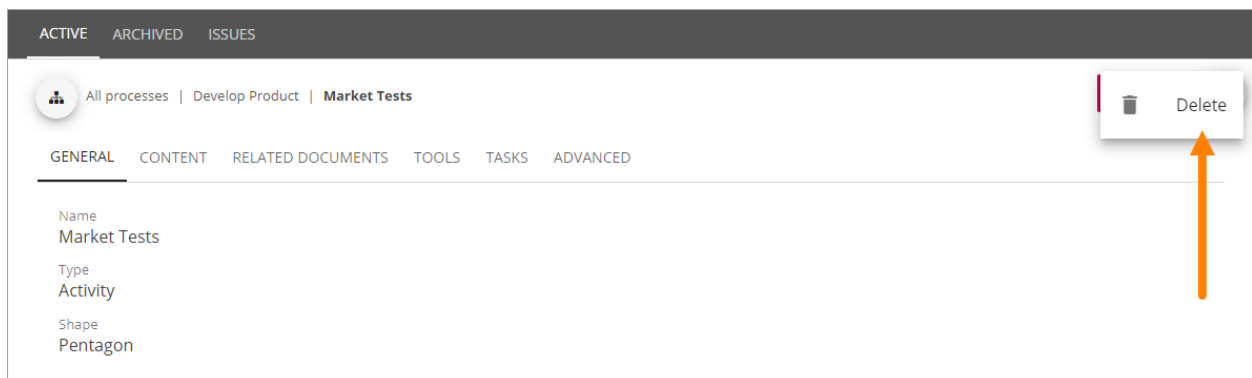
Delete a process step

To delete a process step, do the following:

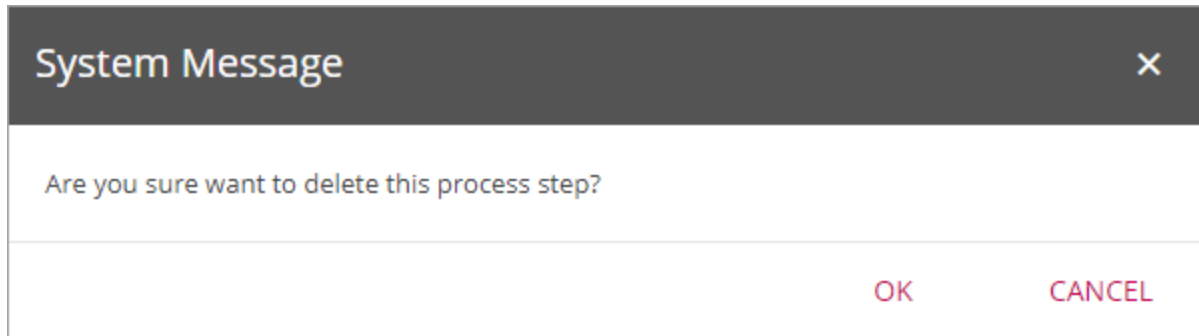
1. Enter the settings for the process step (for example, click the graphic representation for the step).
2. Open the menu to the right.



3. Select “Delete”.

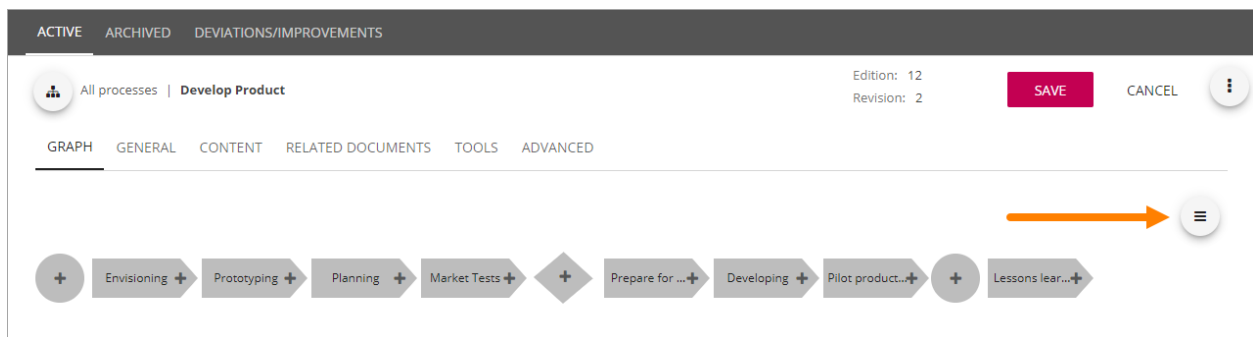


4. Select “OK” (or “CANCEL” if you’re not sure).



Reorder the process graph

You can reorder the process graph if needed. Select the menu to the right:



Choose what you want to do:

Reorder Process Graph

Reorder option:

☒

 Switching processes inside current graph

☐

 Move process between levels

First process item*

Second process step*

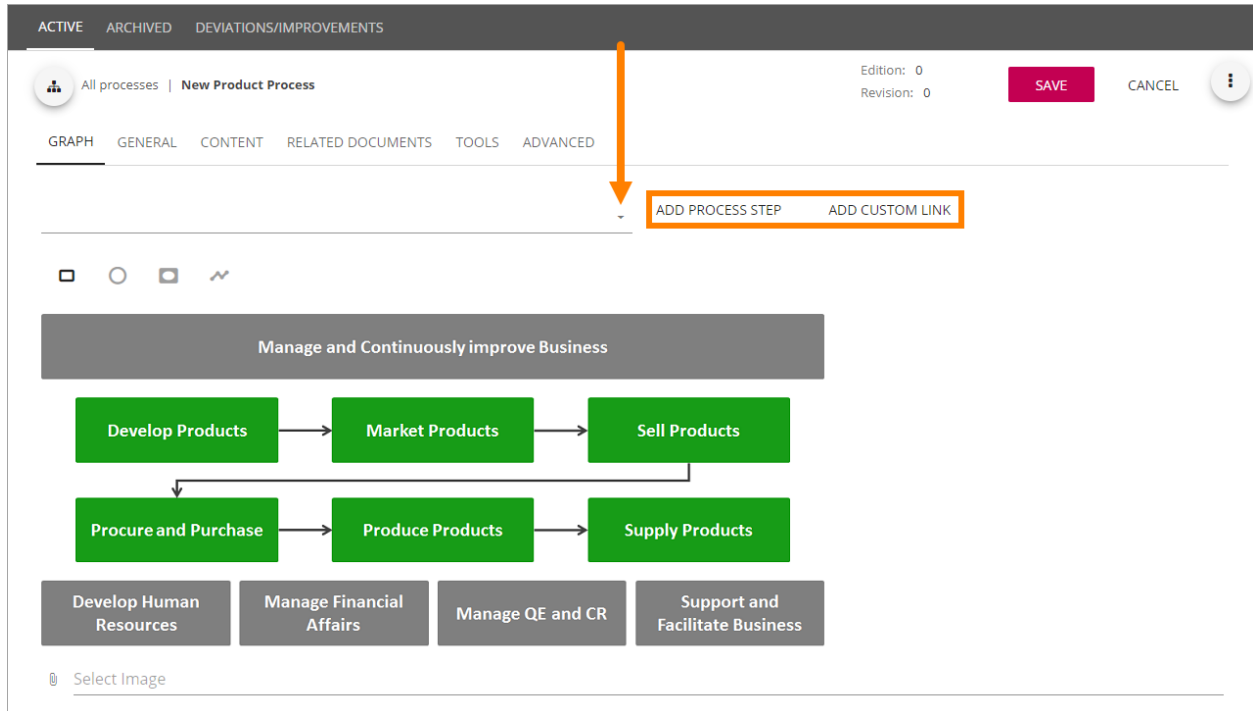
SAVE

CLOSE

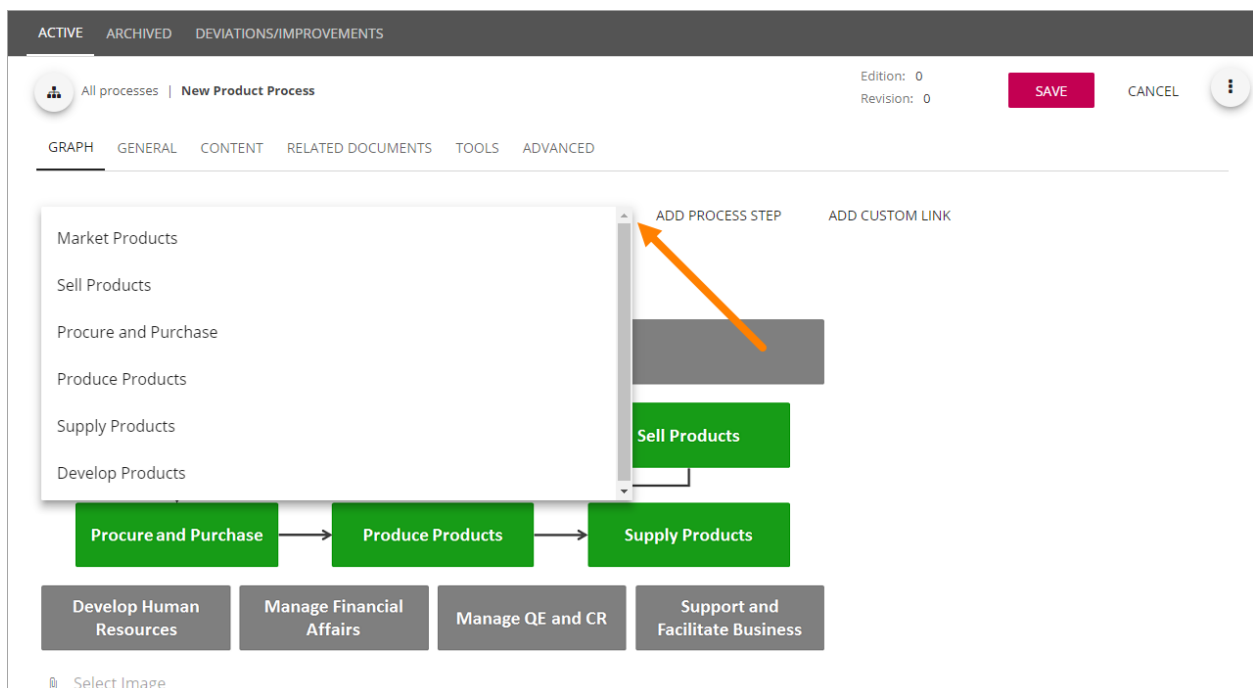
Creating a clickable link to a process

Here's how to add clickable areas (image maps) to a custom image you have uploaded.

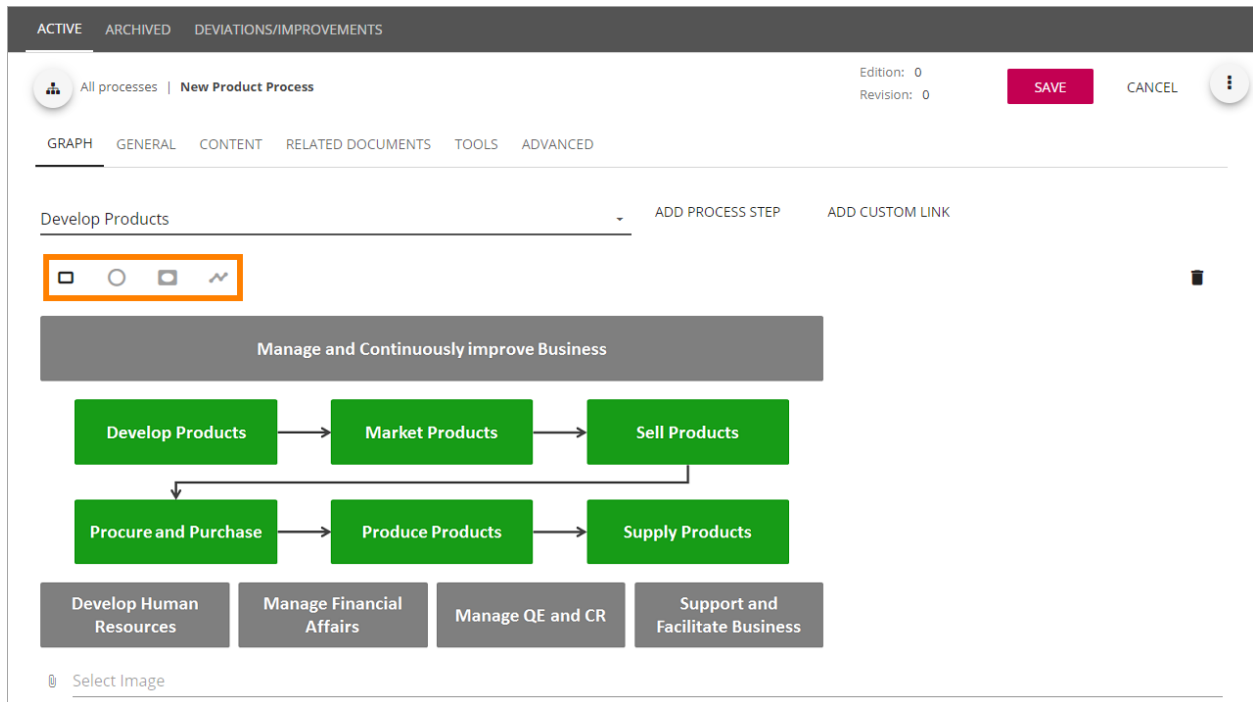
1. Make sure everything you may want to link to is present in the list. If not, use ADD PROCESS STEP and ADD CUSTOM LINK to create Process Steps or links.



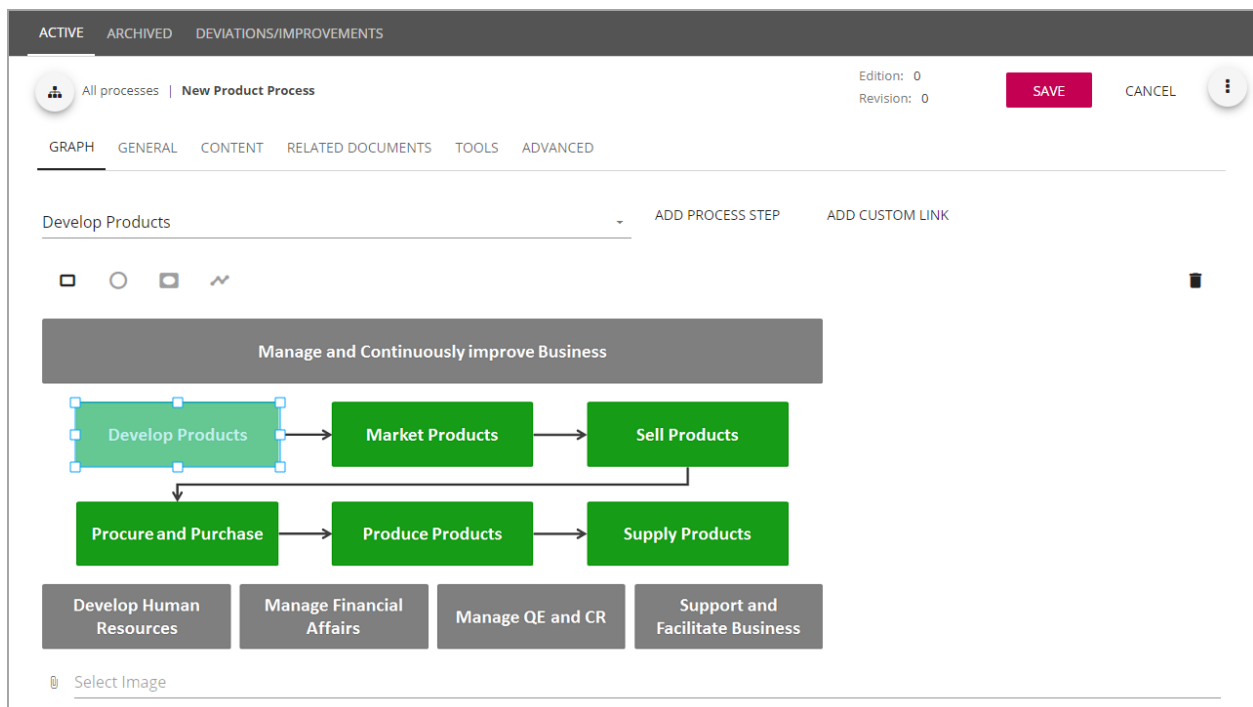
2. Edit the process.
3. Open the list and select what you want to link to.



4. Select the shape for the clickable area.

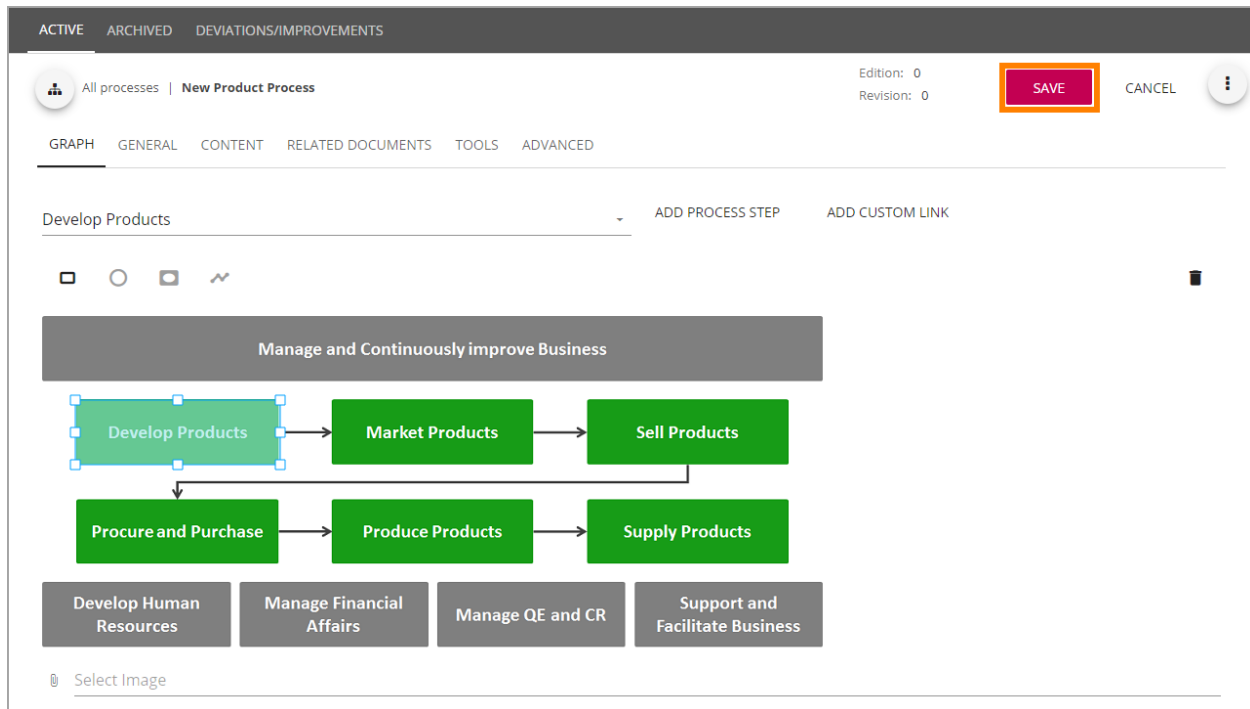


5. Draw the area in the right place in the graph.



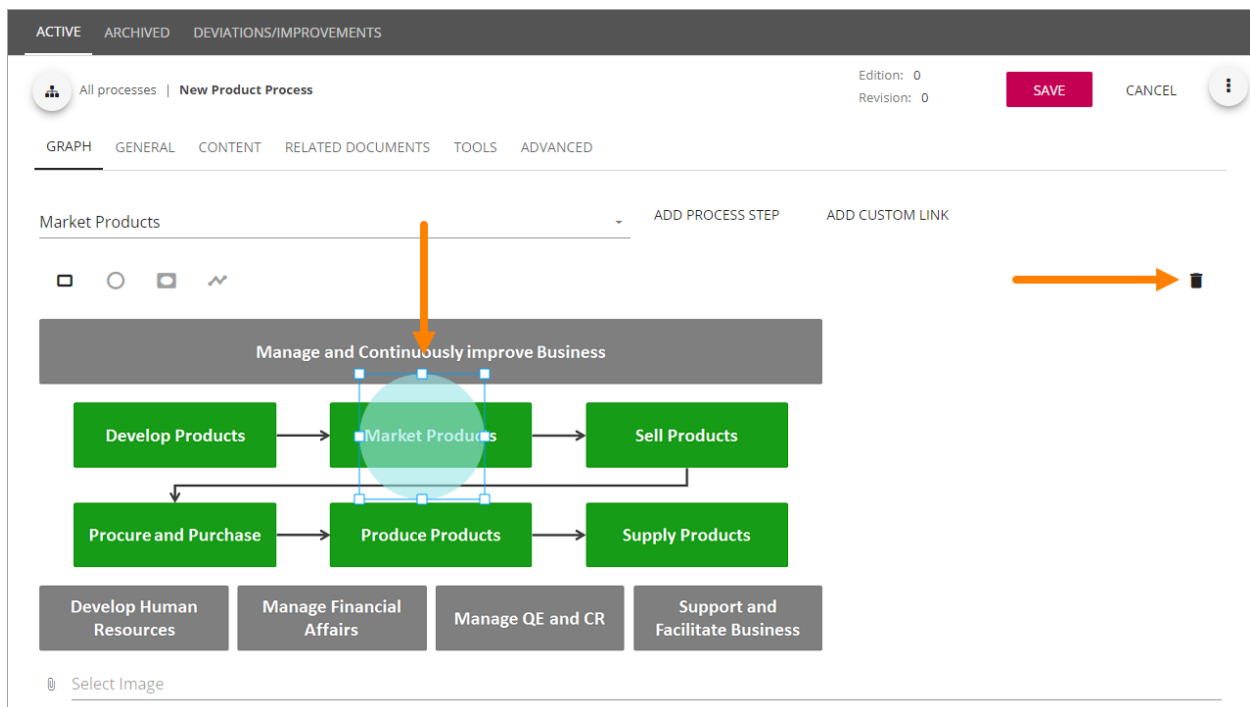
6. Adjust width and height for the area. (Point at an edge, and you can grab and draw that edge.)

7. Click “Save”.



If you have placed an area for a clickable link in the wrong place, just drag the area to the right place.

To delete a clickable area, select it and click the dust bin.



The General tab

On this tab you can set the following:

The screenshot shows the 'Develop Product' process configuration page. At the top, there are tabs: 'ACTIVE', 'ARCHIVED', and 'DEVIATIONS/IMPROVEMENTS'. Below these, there's a breadcrumb trail: 'All processes | Develop Product'. On the right, it shows 'Edition: 12' and 'Revision: 2', along with an 'EDIT' button and a help icon. The main content area has tabs: 'GRAPH', 'GENERAL' (selected), 'CONTENT', 'RELATED DOCUMENTS', 'TOOLS', and 'ADVANCED'. Under the 'GENERAL' tab, there are three sections: 'Name' with the value 'Develop Product', 'Owner' with the value 'Robert Johnson', and 'Graph type' with two radio buttons: 'Shape' (selected) and 'Custom Image'.

- **Name:** Edit the Process Name here if needed.
- **Owner:** Edit process owner(s) here if needed. Note that process owners is separate from site owners.
- **Graph type:** You can change from using Shapes to Custom image, or vice versa.

The Content tab

Here you add/edit the description for the process. Note the format options. You can also insert images, links and tables.

The screenshot shows the 'Develop Products' process configuration page. At the top, there are tabs: 'ACTIVE', 'ARCHIVED', and 'DEVIATIONS/IMPROVEMENTS'. Below these, there's a breadcrumb trail: 'All processes | Develop Products'. On the right, it shows 'Edition: 11' and 'Revision: 13', along with 'SAVE', 'CANCEL' buttons, and a help icon. The main content area has tabs: 'GRAPH', 'GENERAL', 'CONTENT' (selected), 'RELATED DOCUMENTS', 'TOOLS', and 'ADVANCED'. Under the 'CONTENT' tab, there's a rich text editor with a toolbar containing various formatting options like bold, italic, underline, link, etc. The editor contains the following text:

Nunc ac magna. Maecenas odio dolor, vulputate vel, auctor ac, accumsan id, felis. Pellentesque cursus sagittis 23 felis. Pellentesque porttitor, velit lacinia egestas auctor, diam eros tempus arcu, nec vulputate augue magna vel risus. Cras non magna vel ante adipiscing rhoncus. Vivamus a mi.

Purpose

Morbi neque. Aliquam erat volutpat. Integer ultrices lobortis eros. Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas. Proin semper, ante vitae sollicitudin posuere, metus quam iaculis nibh, vitae scelerisque nunc massa eget pede. Sed velit urna, interdum vel, ultricies vel, faucibus at, quam.

Scope

Donec elit est, consectetur eget, consequat quis, tempus quis, wisi. In in nunc. Class aptent taciti sociosqu ad litora torquent per conubia nostra, per inceptos hymenaeos.

Donec ullamcorper fringilla eros. Fusce in sapien eu purus dapibus commodo. Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus. Cras faucibus condimentum odio. Sed ac ligula. Aliquam at eros.

The Related Documents tab

If Omnia Document Management is installed in the current tenant, editors of controlled documents can relate a published document to a process. It's then up to the Process Owner to decide to make the document available at the process in the Process viewer, or not. Another way of doing this is that Process Authors can relate published controlled documents to the process.

Any related document is listed on this tab. To relate a new document, click the button.

ACTIVEARCHIVEDDEVIATIONS/IMPROVEMENTS

All processes | Develop Product

Edition: 12
Revision: 2

SAVECANCEL

GRAPHGENERALCONTENTRELATED DOCUMENTSTOOLSADVANCED

ADD RELATED DOCUMENT

New Product Success Program

Product Development Targets 2018

Development Procedures

Develop Product Handbook

Planning Guidelines (Products)

Product Portfolio Strategy

REJECT

APPROVE

Use this dialog to find and select documents:

Develop Product

Available Documents

THIS SITEALL SITES

Find document ...

Analyzing Test Results Guidelines

New Product Success Program

Market Test Overview

Envisioning Targets

Drive Idea Collaboration

Checklist for Prototyping

Prototyping instruction

Planning Procedure

Review Idea Checklist

Development Process Checklist

How to perform market tests

Lessons Learned Guideline

Workshop Leadership

Selected Documents

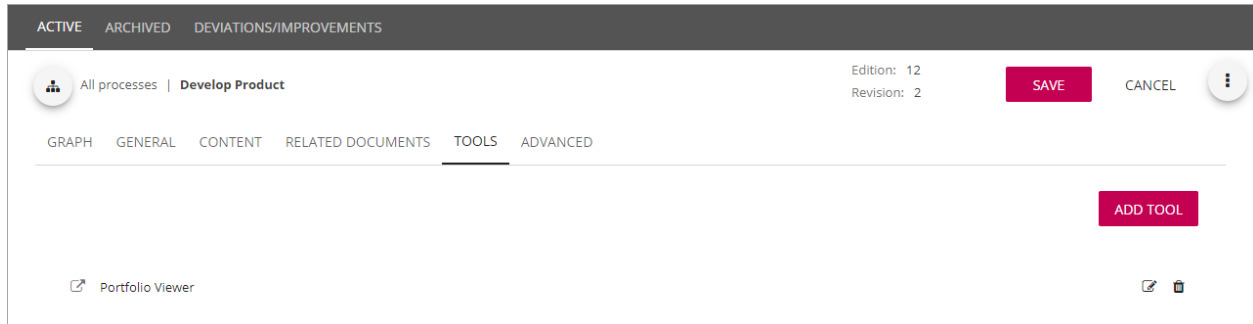
No document is added

ADD

CANCEL

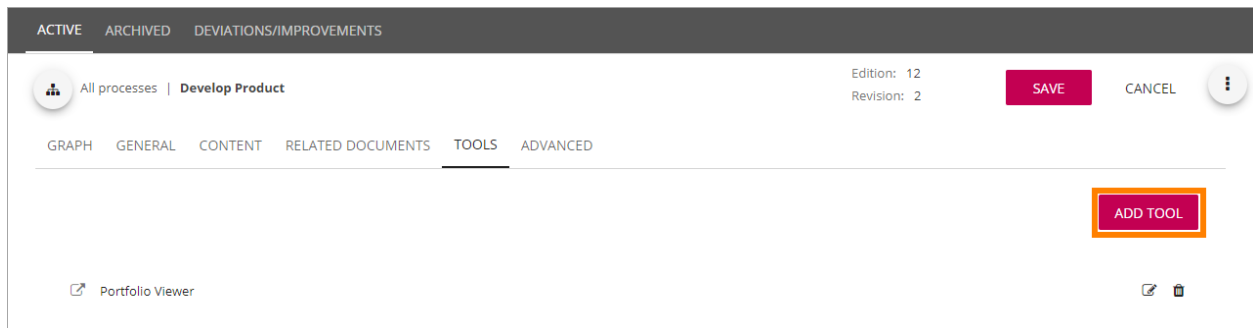
The Tools tab

Use this tab to link to documents. You can also link to pretty much everything, for example pages, by adding custom links. In a long tools list, you can add headings for separate sections, to make it easier for user to navigate.



Do the following to link to a document:

1. Select “ADD TOOL”.



2. Select “Document” from the list.
3. Click “Browse”.

The list of documents, if any, is shown. If the document isn’t uploaded to the team site:

4. Click “Upload Document” and upload the document you want to add to Tools, if needed, and then select the document.
5. Select the document and click “OK”.

← Select Document


×

Tools

Search

Document

Document Id

 Develop products check list.docx

SATWZE6PWANX-137869603-2

UPLOAD DOCUMENT

OK

CANCEL

6. As the last step, click “Save” to add the document to the tools list.

Add Tool

Type

Document

BROWSE

Url

<https://adventrixgroup.sharepoint.com/sites/global-r-d/Tools/Develop prod>

Title

Develop products check list

1.7. Quality Management

SAVE

CANCEL

To add a link to anything (for example a page in Omnia, or an internet page) you can reach through a link, select “Custom link” and add the Url, A Title (name for the link), and select to open the link in new window or not, and click “Save”.

Add Tool

Type

Custom Link

Url

Title

Open in

New Window

1.7. Quality Management

SAVECANCEL

To add headings, if needed, select “Heading, type the heading in the field, and click “Save”.

Add Tool

Type

Heading

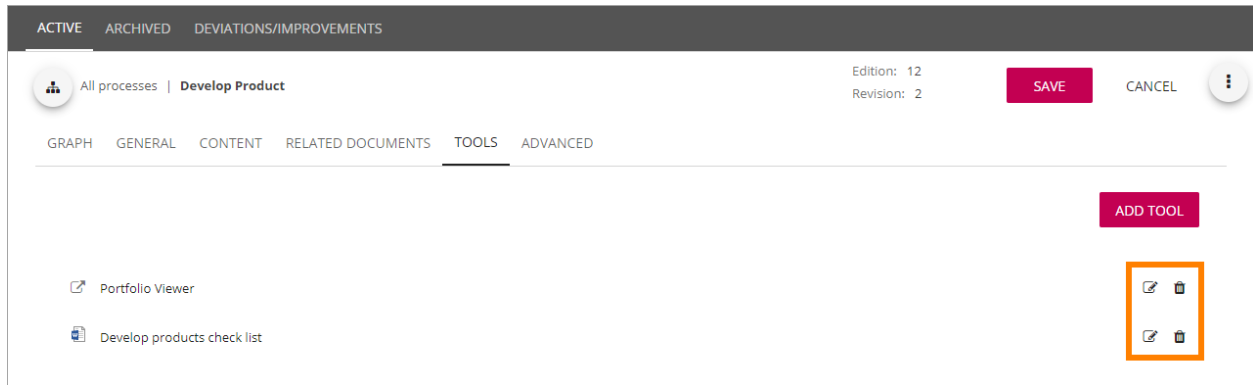
Title

Value is required

SAVE

CANCEL

To edit or delete a tool, click the icon for the tool.

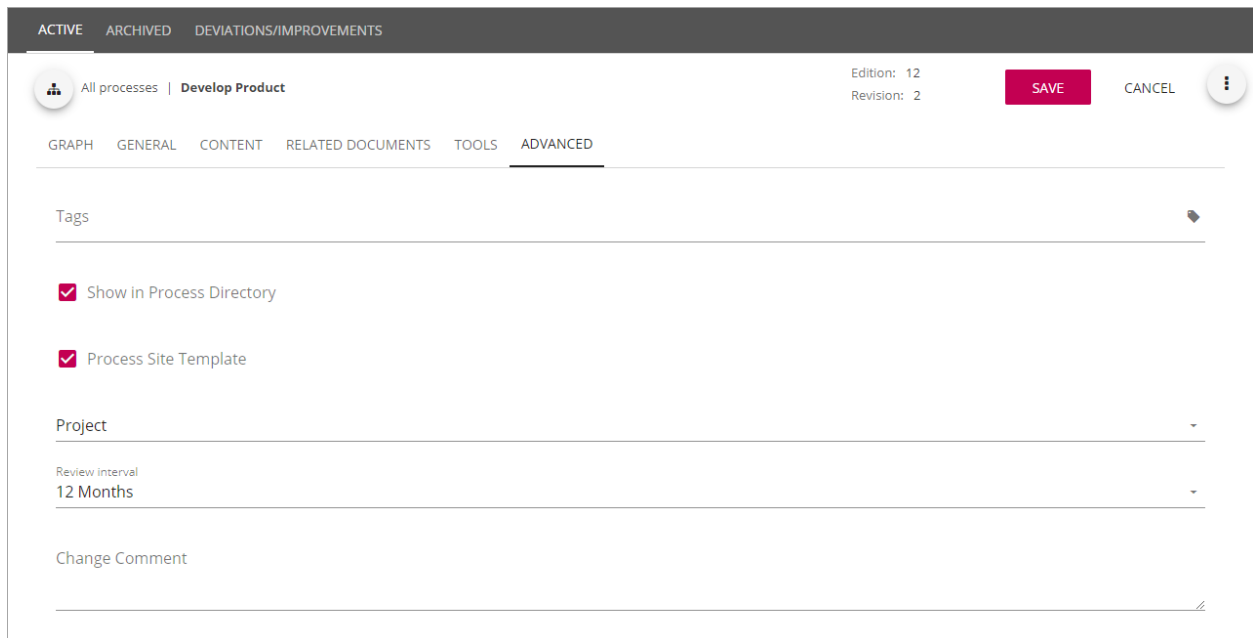


If you would like the tools to be shown in another order, just use drag and drop.

Don't forget to save before you go on to another tab.

The Advanced tab

On this tab you can set the following:



- **Tags:** Add tags for the process. This is a metadata list. You can select tags from the list, you can not create new tags here. The tags are important for search. (Available tags are set up centrally, see Setup Quality Management.)
- **Show in Process Directory:** Decide if the process could be shown in a possible Process Directory or not (Default: Show).
- **Process Site Template:** You can create a “Process Site Template” from this process. You can then create a new team site based on this process. Documents you link to and actions you add here will then be set up in the team site created from this template process.
- **Review interval:** Set Review interval. When a published process is nearing it's reviewal time, it will be part of the reviewal list in Omnia Admin. (See more information about Review below).

- **Change comment:** Here you can add a comment about the latest changes for this process.

The Deviation/Improvement tab

If set up, users can send feedback to a process, via the link “Feedback” in the Process Viewer, and tag the posting as Improvement, Deviation or Risk. These feedback posts are shown and can be handled on this tab.

ACTIVE ARCHIVED DEVIATIONS/IMPROVEMENTS					
NEW		Process		EXPORT TO EXCEL	
Title ↑	Type	Status	Date	Responsible	Process
Add project closure phase to process	Improvement	Suggestion	2018-09-28		Develop Product
Avvikelse i produktvecklingsprocessen	Deviation	In Progress	2018-06-11		Develop Product
Better template support	Improvement	Suggestion	2018-04-14		Develop Products
Förbättringsförslag 5	Improvement	Suggestion	2018-02-20		Develop Product
Improvement ABC	Improvement	Suggestion	2018-02-05	Anna Karlsson	Quality Control
Improvement of Develop Product Process	Improvement	In Progress	2018-03-21		Develop Product
Improvement suggestion Product Development	Improvement	Suggestion	2018-07-03		Develop Product

You can use the “New” button to add feedback here yourself.

More information is found here: [Deviations/Improvements](#)

Revert to an earlier version

If something goes really wrong when editing a process, you can revert back to an earlier draft version of the process.

Note!: Draft versions are only available until you publish. When a process is published, all draft versions for that edition of the process are removed. You can not revert back to an earlier published version.

Use the option “Revert” in the menu to the right.

The screenshot shows the 'DEVIATIONS/IMPROVEMENTS' tab in the process viewer. At the top, it says 'Edition: 12' and 'Revision: 3'. There is an 'EDIT' button and a dropdown menu. The dropdown menu is open, showing options: 'Archive', 'Move', and 'Revert'. The 'Revert' option is highlighted with an orange border. Below the menu, a process flow diagram is visible with steps: Envisioning, Prototyping, Planning, Market Tests, Prepare for ..., Developing, Pilot product..., and Lessons learned.

In the list shown you select which version to revert to.

Revert

☒ Version 37.1
2019-02-07 09:31:18

☐ Version 37.0

REVERT

CLOSE

Publish a process

To publish the process, just click “Publish”.

To be able to publish a process, you have to have the correct permission. If you don’t have the permission, the Publish button is grey.

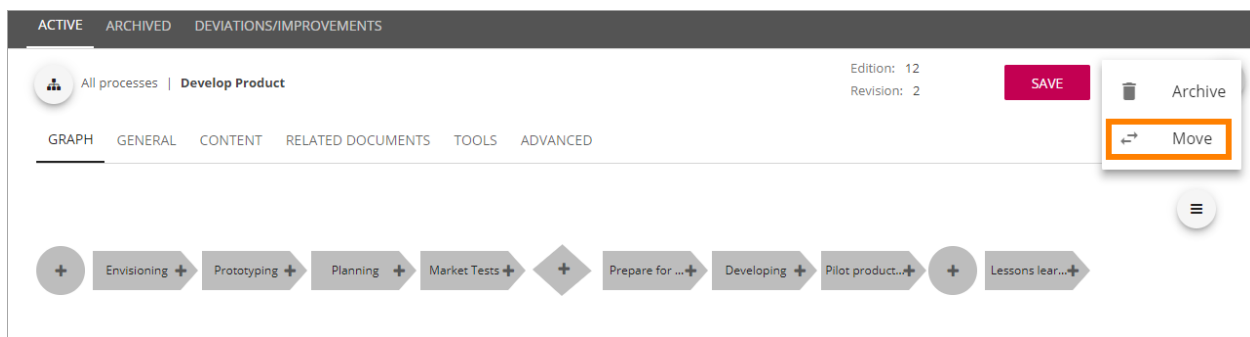
Move a process

A process can be moved to another team site if needed. It’s done this way:

1. Go to the team site you will move the process to and copy the URL.

Note!: The URL should be to the Team site itself, not to the process library in that site.

2. Open the menu to the right and select “Move”.



3. Paste the URL in the top field.

The name of the site should now be displayed in the second field, for example:

Move Process

Target Site Url

https://adventrixgroup.sharepoint.com/sites/it-department

Site

IT Department

MOVE

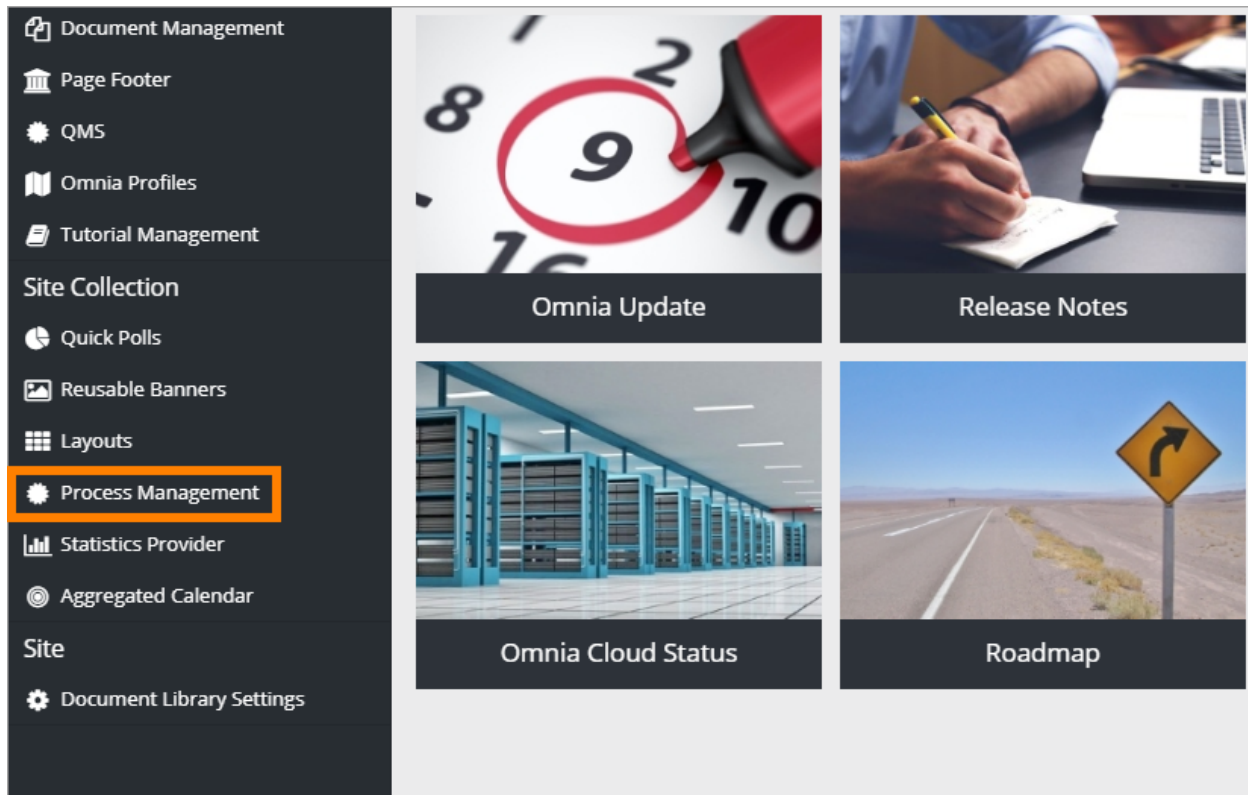
CANCEL

4. Select “Move”.



Review processes

To see a list of processes that is nearing their review times, do the following:

1. Go to a site where a Process Library is installed.
2. Open Omnia Admin and select “Process Management” under “Site Collection”.



Then select “Reviews”. Here’s an example of a Review list:

 Process Management »  Reviews

Search

Owner

Process

Date from

To date

Status

Search

Clear

Export Comments

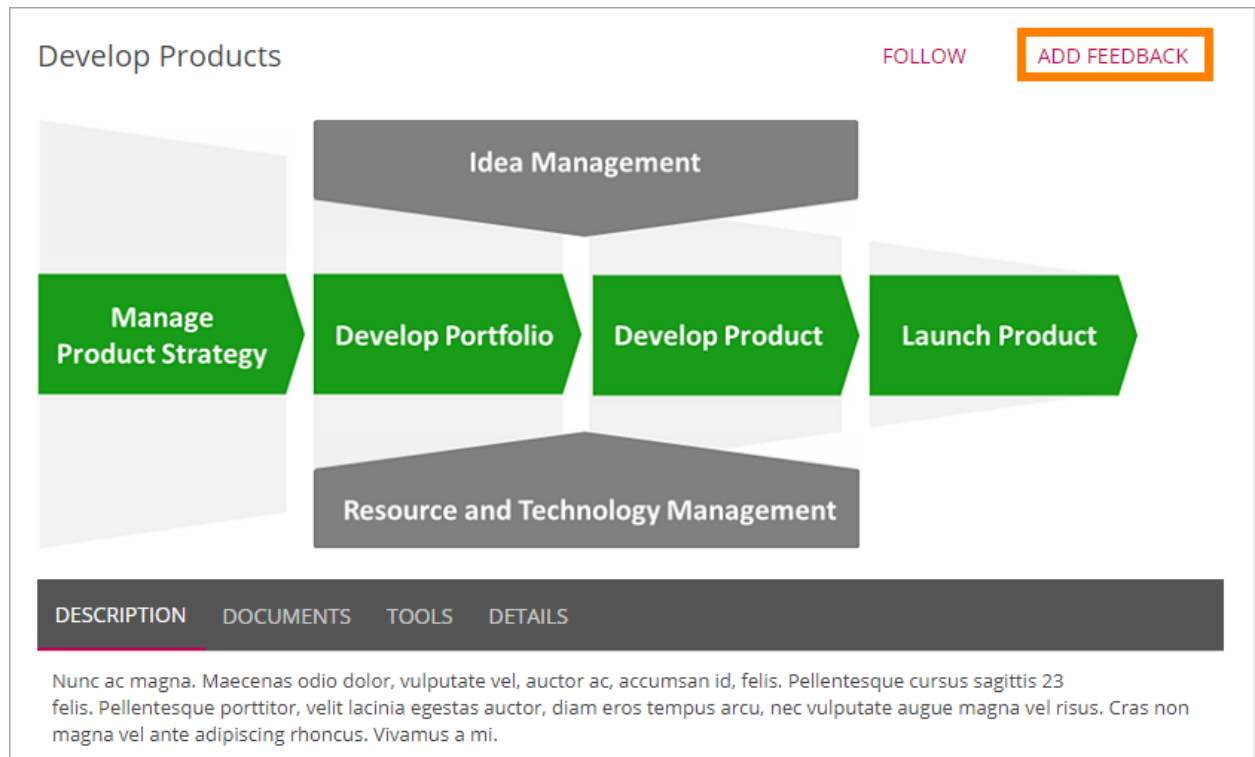
Process step	Status	Review Date	Modified	Owner
Develop Product	In progress	2018-11-17	2018-02-05	Robert Johnson
Develop Products	Finished without changes	2018-06-13	2018-03-23	Robert Johnson
Idea Management	Not started	2018-09-23	2018-03-23	Robert Johnson
Idea Management	Not started	2019-03-20	2018-03-20	Robert Johnson
Procure Goods	Not started	2021-02-13	2018-02-13	Robert Johnson
Quality Control	Not started	2018-08-05	2018-02-05	Robert Johnson

Use the fields at the top to filter the list. Use “Clear” to clear filtering and see the whole list. Use “Export” to export the list that is shown, to Excel.

Also note that you can click the headings to change between ascending and descending sorting.

Deviations/Improvements

Using the the option “Add Feedback” any user that has access to a published process can send feedback:



The user types a title, selects type of feedback: Improvement, Deviation or Risk, adds a text and can even attach files:

New Improvement

Title

Type

Improvement

Description

Attach files

Associate process step

Adventrix Group Main Process Map > Develop Products

SUBMIT

CLOSE

When a process is edited, all feedback concerning that process, is available on the “Deviation/Improvement” tab:

ACTIVE ARCHIVED DEVIATIONS/IMPROVEMENTS					
NEW		Process ▼			EXPORT TO EXCEL
Title ↑	Type	Status	Date	Responsible	Process
Add project closure phase to process	Improvement	Suggestion	2018-09-28		Develop Product
Avvikelse i produktvecklingsprocessen	Deviation	In Progress	2018-06-11		Develop Product
Better template support	Improvement	Suggestion	2018-04-14		Develop Products
Förbättringsförslag 5	Improvement	Suggestion	2018-02-20		Develop Product
Improvement ABC	Improvement	Suggestion	2018-02-05	Anna Karlsson	Quality Control
Improvement of Develop Product Process	Improvement	In Progress	2018-03-21		Develop Product

You can use the link to the right to export the list to Excel. You can click the headings to change between ascending and descending sorting.

You can also add feedback yourself, for example if you have got feedback some other way than through the system. Just click “New” and use the tabs as described below.

To work with a feedback post, just click the link.

Working with deviations/improvements

When editing feedback, you work with three tabs, se the sections below.

Information

On this tab, the following options are available:

Improvement of Develop Product Process

INFORMATION

ACTIONS

HISTORY

Title

Improvement of Develop Product Process

Type

Improvement

Description

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Maecenas porttitor congue massa. Fusce posuere, magna sed pulvinar ultricies, purus lectus malesuada libero, sit amet commodo magna eros quis urna.

Nunc viverra imperdiet enim. Fusce est. Vivamus a tellus. Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas. Praesent bibendum augue condimentum malesuada. Suspendisse vitae. Cras nibh augue, dictum malesuada euismod turpis et id porta tortor quis vestibulum. Quisque massa diam, lacinia in laoreet malesuada. Aenean eros commodo neque eget tincidunt molestie magna quis lacinia magna a libero. Cras id lacinia nibh. Suspendisse id consectetur dapibus lectus. Donec molestie ullamcorper consectetur. Suspendisse interdum ornare justo. Proin elit justo, congue in suscipit quis, auctor vel augue. Duis convallis diam accumsan velit. Mauris

Status

In Progress

Responsible

Attachments

Attach files

☐ Confidential

Associate process step

Develop Product

CHANGE ASSOCIATION

SAVE

DELETE

CANCEL

Use the options this way:

- **Title:** What you see is the title the user added when sending the feedback. Change the title if needed.
- **Type:** When sending the feedback, the user entered a type. You can change the type here if needed.
- **Description:** When sending the feedback, the user entered a description. You can edit or add to the description, if needed.

- **Status:** Status should be changed as the work with the feedback post progresses. When the user sends the feedback, the status is always “New”. Status can be changed to “Suggestion”, “In progress”, “On hold” and “Finished”. Note that as feedback postings are visible in a list in Omnia Admin as well, changing status is a great way to show that the feedback is actually dealt with.
- **Responsible:** When some of the Process Authors has started working on a feedback post, it is a good idea to enter a name in this field so that others can see who’s responsible for this feedback post.
- **Attach files:** Files can be attached using this button. It can be any type of file.
- **Confidential:** This is an old setting, kept for compatibility reasons. Not used in later installments.
- **Associate process step:** Here you can add information about which process step(s) the feedback is valid for.
- **Delete:** This feedback post can be deleted, if needed, using this button.

Actions

Use this tab to add and edit actions for the feedback.

Improvement of Develop Product Process

INFORMATION

ACTIONS

HISTORY

Arrange meeting with Owners

⌚ Due date: 2018-10-19

Status: New

Responsible: Robert Johnson

ADD

SAVE

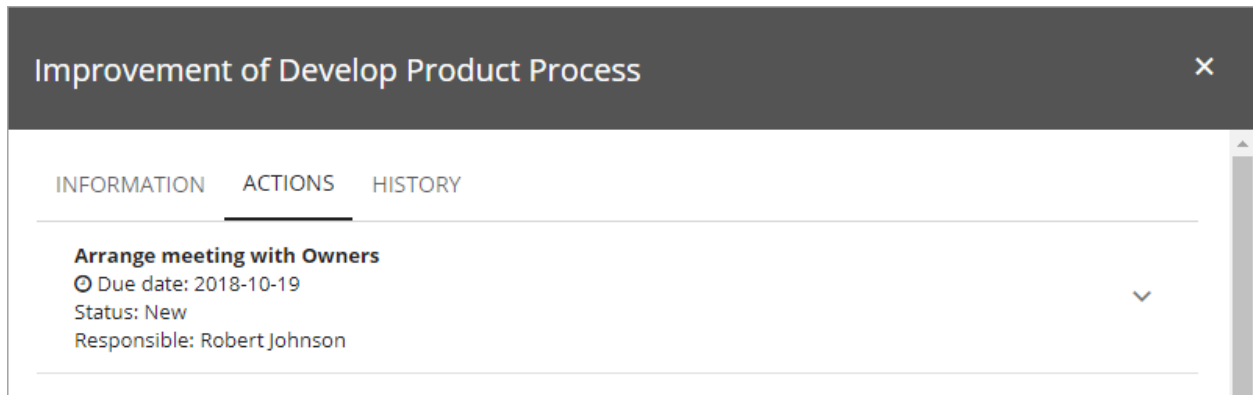
DELETE

CANCEL

To specify any actions that has taken place or will be needed, click “Add” and specify using these fields:

- ## 1.7. Quality Management

Active actions are shown in the list of actions this way:



To edit an action, just click on it and the same fields as described above will be available.

History

History for the actions on this feedback is listed on this tab.

Improvement of Develop Product Process

×

INFORMATION

ACTIONS

HISTORY

🕒 4 months ago Improvement were updated

Added action(s):

- Title: Arrange meeting with Owners
Responsible: Robert Johnson. Due date: 2018-10-18. Status: New
Description: Blah, blah, blah

👤 Modified by: Robert Johnson

🕒 4 months ago Improvement were updated

Updated field(s):
Status: Suggestion > In Progress

👤 Modified by: Robert Johnson

🕒 a year ago Improvement was added

👤 Created by: Robert Johnson

SAVE

DELETE

CANCEL

Read & Understood

Use this option in Omnia Admin to send messages to managers or others to make sure they are aware of changes or additions in a process.

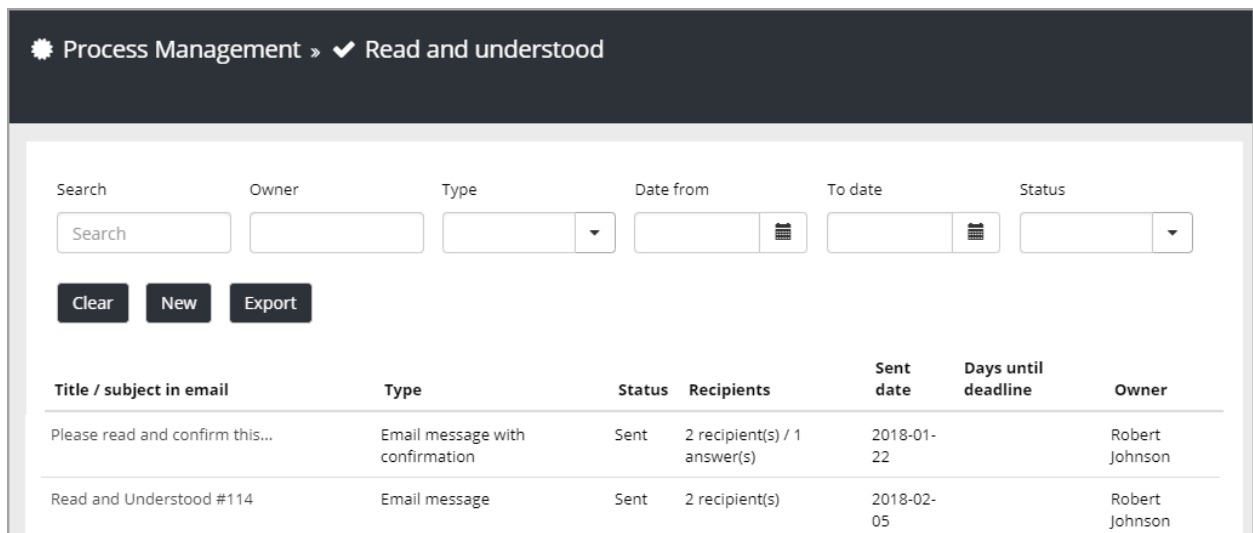
Note! The scope for this option is Site Collection so each team site has it's own list.

1. Select “Process Management” under “Site Collection”.



2. Then select “Read and understood”.

All Read & Understood items (if any) for the current team site, will be shown in the list.



When sending a new message, first choose a one way Email message, or an Email message with confirmation.

New read & understood item

Type of read & Understood

☒ Email message

☐ Email message with confirmation

OK Cancel

For the message, use the following tabs:

The Message tab

Use this tab to type a title and the message text for the e-mail:

Create read & understood Item

Status: Draft Type: Email message

Message Link(s) Recipients Send test message

Title / subject in email*

Text (body) in e-mail*

B I U Paragraph Bulleted list Numbered list Indent Outdent Undo Redo Insert image Link Unlink Table Source code

Owner*

Robert Johnson x

Save and send messages Save draft Cancel

The name in the field “Owner” will be noted in the e-mail. Names can be deleted and added in this field, if needed.

The Link(s) tab

Use this tab to add links to process steps that has been changed or added.

Create read & understood Item

Status: Draft Type: Email message

Message

Link(s)

Recipients

Send test message

Link(s) to process step*

Add

Save and send messages

Save draft

Cancel

The Confirmation tab

If “Email message with conformation” is selected, this tab is shown.

Create read & understood Item

Status: Draft Type: Email message

[Message](#)
[Link\(s\)](#)
[Recipients](#)
[Send test message](#)

Email Address*

admin@adventrixgroup.onmicrosoft.com

Send test message

Save and send messages

Save draft

Cancel

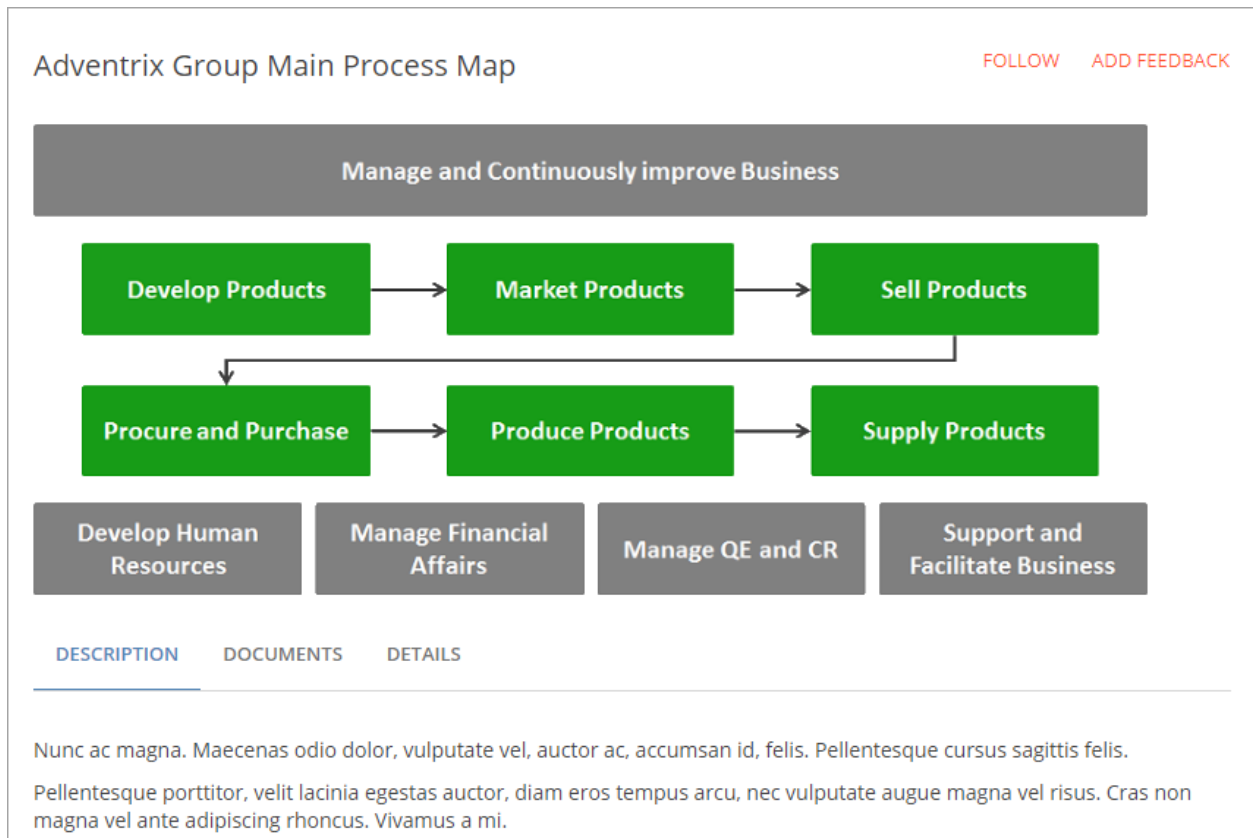
1.7.3 End User

Process Viewer

The Process viewer control is available as a web part for legacy pages and as a block for Quick Pages.

This control is used to display the process for end users, where they can navigate, read the description, linked documents and more.

Here's an example:

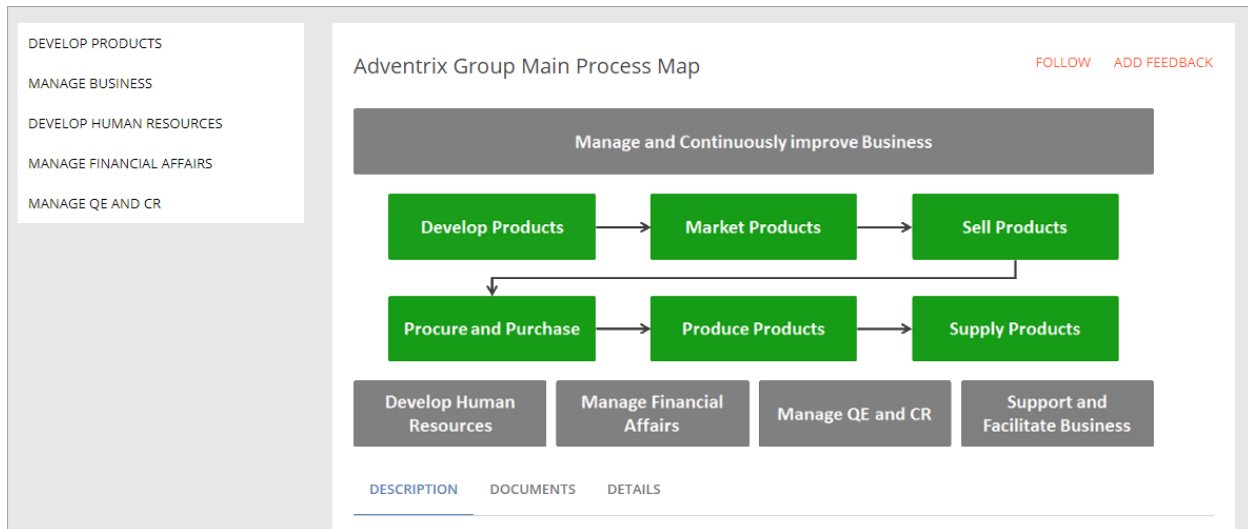


Note! This control is best suited to the main part of the page. It will need space.

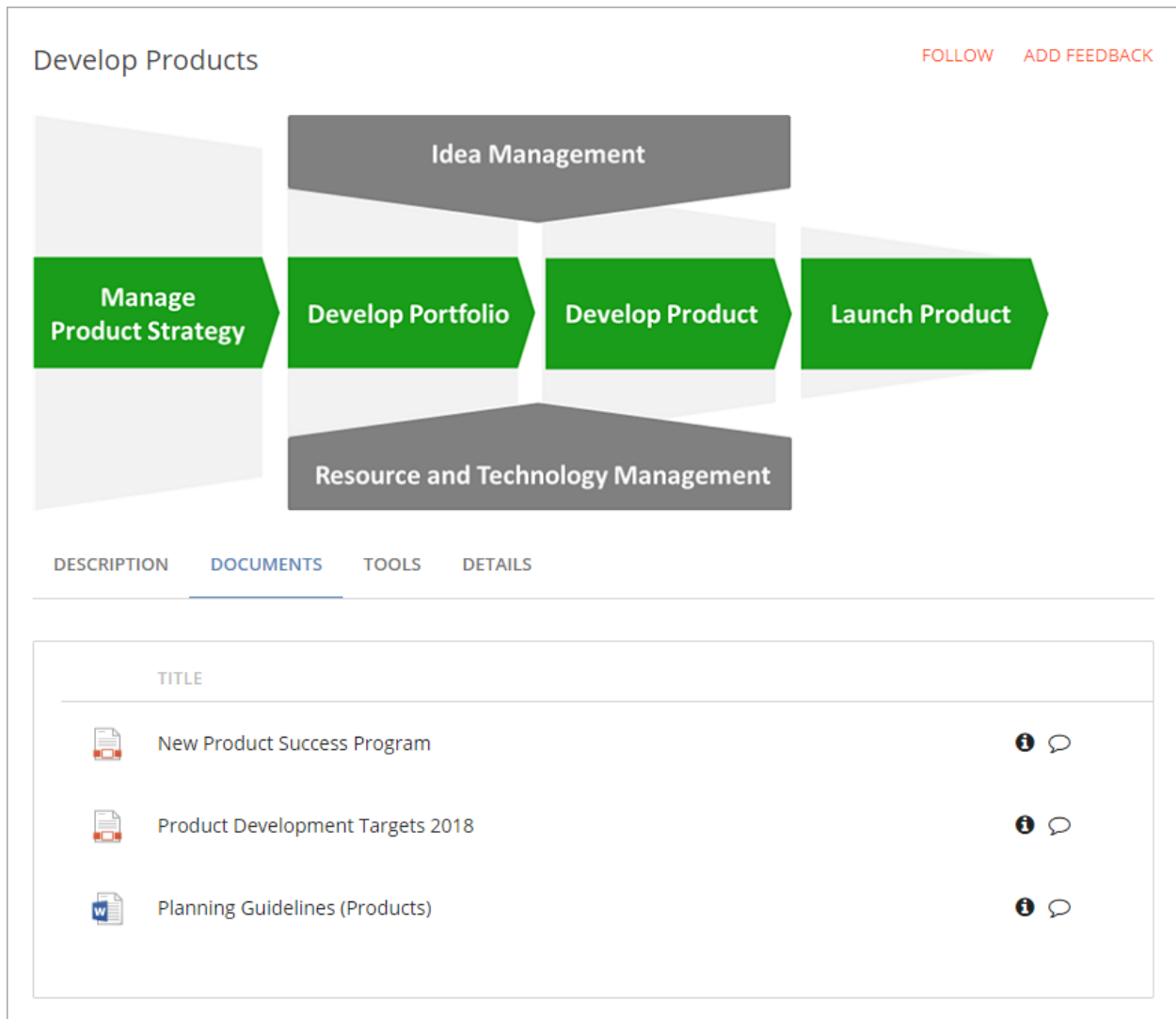
The end users experience

The following options are normally available:

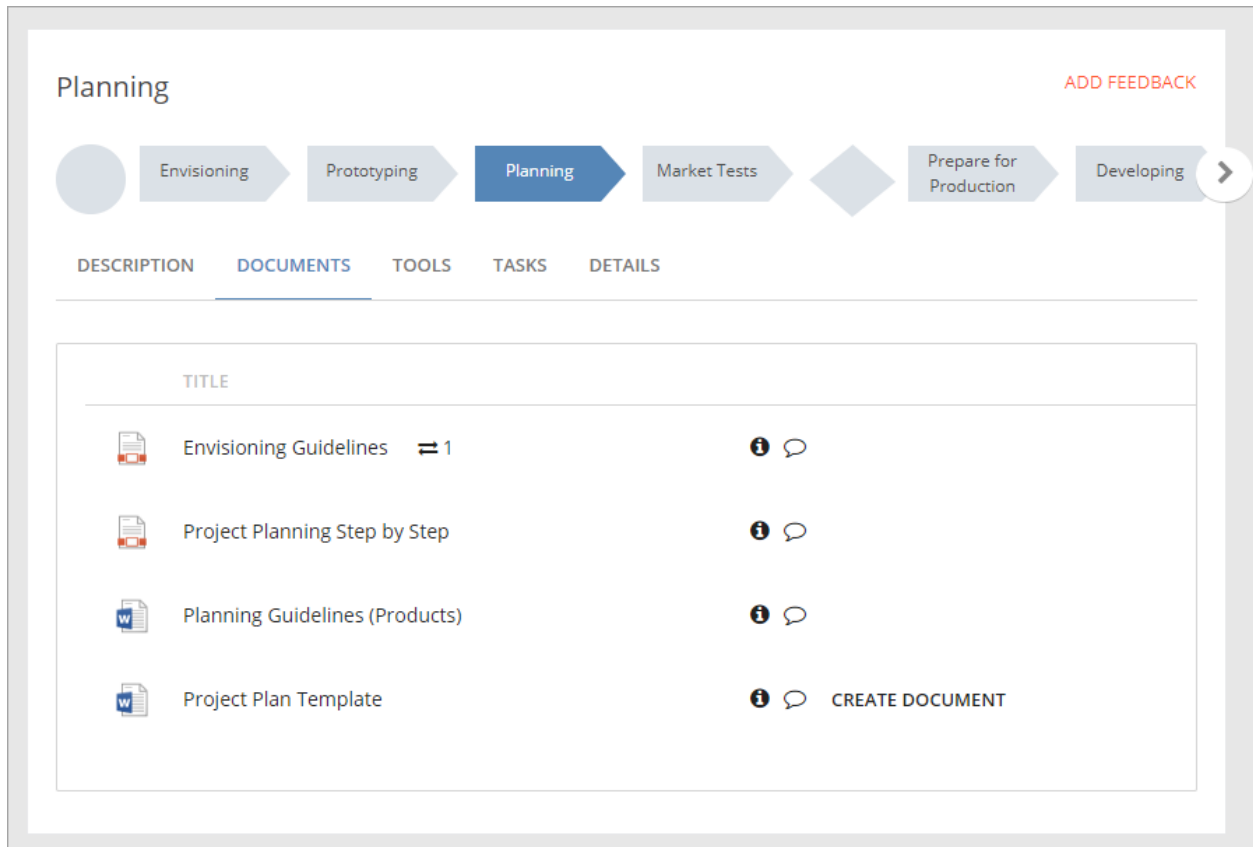
- **Follow:** If this option is available, users can follow a process. For more information about this, see: [My Processes](#)
- **Add feedback:** If this option is available, a user can send feedback about the process, see: [Deviations/Improvements](#)
- **Navigation:** If a graph is available users can normally click parts of the graph to go to a sub processes. If process images are shown, they can be used the same way (see below). Normally a navigation is also shown to the left of the graph, for example:



- **Description:** A description of the process, or sub process, is shown on this tab. This tab is normally active when the page is first shown.
- **Documents:** If integrated with Omnia Document Management, a “Documents” tab will be shown. Controlled Documents published to a process will then be listed where appropriate, so that users can read these documents.



Furthermore, the process can be set up so that users can just not read documents, but also create documents from one or more templates. If creating a document is possible, the “Create Document” link will be shown. Here’s an example with both documents and a template:



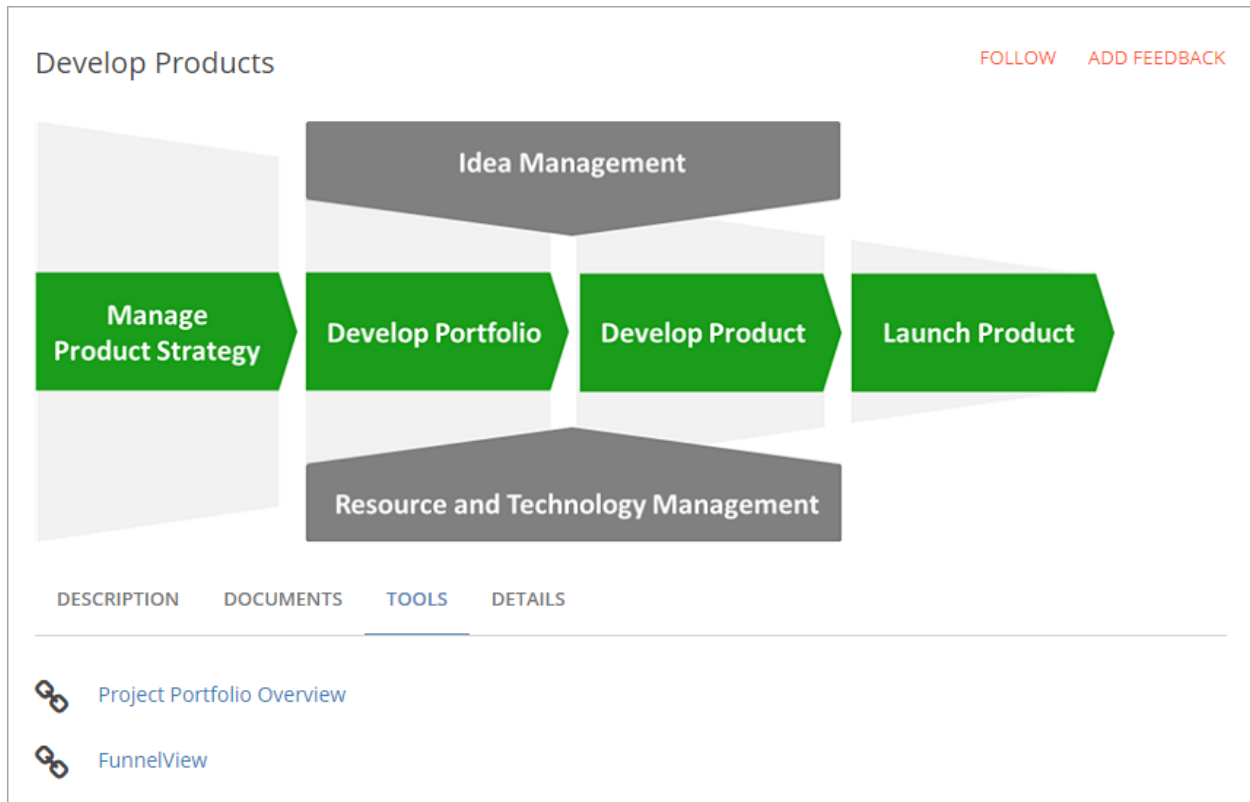
When a user creates a document from the template (clicks the link by the template), the Create Document Wizard will be used, for example:

The 'Create New Document' wizard is shown with the following sections:

- Controlled Document:** A checkbox that is checked.
- Select type:** A dropdown menu showing 'Project Plan'.
- English:** A label indicating the language.
- Select a template:** A dropdown menu showing 'Project Plan Template'.
- Properties:**
 - Document Owner:** A text input field.
 - Project:** A text input field.
- Name:** A text input field.
- Title:** A text input field.
- File Name:** A text input field with a file extension of '.docx'.
- Select a location:**
 - SUGGESTED:** A list of suggested locations: Project Tellus, IT Department, Global R & D, Global Marketing, ProDev Team, and Team HR.
 - FOLLOWED:** A tab for followed locations.
 - ALL:** A tab for all locations.
- Buttons:** 'CREATE' and 'CANCEL' buttons at the bottom right.

More information about the Create Document Wizard is found here: [Create Document Wizard](#)

- **Tools:** Process authors can publish tools to be used by users. It can for example be useful links or documents. Documents available under this tab can not be controlled documents, but it can be useful to make documents available on this tab if, for example, Omina QMS is not integrated with Omnia Document Management. Here's an example of links available on the "Tools" tab:



- **Details:** On the "Details" tab more information about the process is shown, for example owner, edition, revision, and when the process was last edited. Here's an example:


Develop Products FOLLOW ADD FEEDBACK

Manage Product Strategy Develop Portfolio Develop Product Launch Product

Idea Management

Resource and Technology Management

DESCRIPTION DOCUMENTS TOOLS **DETAILS**

Owner	Version	Info
 Robert Johnson Department Manager	Edition 11	ID #566
	Revision 12	Review 2018-06-13
	Modified 2018-07-06	

- **Tasks:** A process author can also add a list of tasks that should be completed for a process step. If any tasks are added, a “Tasks” tab will be visible here, and the tasks list shown as a check list, for example:

Planning ADD FEEDBACK

Envisioning Prototyping Planning Market Tests Prepare for Production Developing

DESCRIPTION DOCUMENTS TOOLS **TASKS** DETAILS

TITLE

Create Plan

Invite participants

Conduct workshop

Actual work with tasks is done in the team site.

This image is also a good example of when a process author has added images to illustrate the process steps necessary. Users can click the images to get information about each step and, depending on what is available, tabs, as described above, can be shown.

Settings for the control

The settings are organized in five tabs, see the sections below.

The General tab

On this tab the following settings are available:

Process viewer settings

GENERAL GRAPH LEFT NAVIGATION TEAM SITE CUSTOM COLORS

Selected published process

Adventrix Group Main Process Map

Process step breadcrumb setting

☒ Show

☐ Hide

Start link

Title

Address

SAVE CANCEL

- **Selected published process:** Add the name for the process to be shown here (As the heading says, the process must be published). When you start typing, the processes that corresponds with what you have typed so far is shown in a list. You can then select from the list or continue typing.
- **Process step breadcrumb setting:** Decide to show the process steps in the breadcrumb or not. (Default=Show.)
- **Start link:** You can use this to set the start link for the breadcrumb. If not used, the breadcrumb will work according to the Omnia Intranet settings.

The Graph tab

Here you can set the following:

Process viewer settings

GENERAL

GRAPH

LEFT NAVIGATION

TEAM SITE

CUSTOM COLORS

Auto expand child item when selected parent

☒ Yes

☐ No

Display

☒ Show

☐ Hide

SAVE

CANCEL

- **Auto expand child item when selected parent:** This is an older setting, kept for compatibilty reasons. Not used in later installments.
- **Display:** If no graphs should be shown for this process, select this box.

The Left navigation tab

Use this tab to set if left navigation should be available (Default: Show), and if all nodes or just the current should be shown (Default: Current).

Process viewer settings

GENERAL

GRAPH

LEFT NAVIGATION

TEAM SITE

CUSTOM COLORS

Display

☒ Show

☐ Hide

Display node

☒ Show current

☐ Show all

SAVE

CANCEL

Team Site

Use this tab to select if task planning should be enabled. This is valid when a Process Viewer is set up in a team site. If there are more than one Tasks lists in the site, select which Tasks list to use for task planning.

Process viewer settings

×

GENERAL

GRAPH

LEFT NAVIGATION

TEAM SITE

CUSTOM COLORS

☐ Enable task planning

SAVE

CANCEL

The Custom Colors tab

You should primarily set colors through Theme colors in Omnia Admin (System/Settings/Default colors). If you still would like custom colors for the control, you can set them using this tab.

Process viewer settings

×

GENERAL

GRAPH

LEFT NAVIGATION

TEAM SITE

CUSTOM COLORS

Border color

#e7e8ea

×

▼

Active subprocess text color

▼

Active subprocess background color

▼

Active graph item color

#99e6e6

×

▼

Opacity

0.01

Active tab text color

#FEFEFE

×

▼

Icon color

#c30052

×

▼

Active text color

▼

Background color

#fff

×

▼

Inactive subprocess text color

▼

Inactive subprocess background color

▼

Inactive graph item color

#808080

×

▼

Text color

▼

Action button color

#c30052

×

▼

Selected left navigation background color

▼

SAVE

CANCEL

1.7. Quality Management



521











Process Directory

The Process Directory control is available as a web part for legacy pages and as a block for Quick Pages.

Here's how a Process Directory block can look for end users:

Process Directory


FILTER 

	TITLE	OWNER	TAGS
	Adventrix Group Main Process Map	Robert Johnson	
	Develop Human Resources	Robert Johnson	HR
	Develop Product	Robert Johnson	
	Develop Products	Robert Johnson	
	Develop process	Robert Johnson	
	Employee Evaluation	Robert Johnson	HR
	IT Onboarding New Employee	Robert Johnson	IT
	Idea Management	Robert Johnson	
	Manage Business	Robert Johnson	
	OSM process	Robert Johnson	

< 1 - 10 >

Note! The control is best suited to the main part of the page. It will need space.

Settings for the control

The settings are organized in four tabs, see the sections below.

The General tab

On this tab the following settings are available:

Process Directory Settings

×

GENERAL

COLUMNS

FILTERS

CUSTOM COLORS

Title

Process viewer page

https://adventrixgroup.sharepoint.com/#!/Pages/process.aspx

Scope

☐ Current site
 ☒ All sites
 ☐ Specific site

https://adventrixgroup.sharepoint.com

Number of items per page

10

☒ Show filter

☐ Open process with new tab

Sort Property

RefinableString50

☒ Ascending

SAVE

CANCEL

- **Title:** Set the title for the list, that will be displayed for users.
- **Process viewer page:** The address to the actual page that was set up for the Process viewer is added to this field.
- **Scope:** The most common setting for the scope is “All sites”. If “Current site” is selected, all processes (and only these) that exists in the current site will be available in the list.
- **Number of items per page:** Set the number of items to be displayed on each “page” in the list.

- **Show filter:** Set if users should be able to filter the list.
- **Open process with new tab:** Set what will happen when a user clicks a process link in the list - open in new tab or new page.
- **Sort Property:** This field needs to contain a sort property, see example in the above image.
- **Ascending:** Keep this selected for ascending sorting. Deselect for descending sorting.

The Columns tab

Use this tab to decide which columns to display for the list.

Process Directory Settings

×

GENERAL **COLUMNS** FILTERS CUSTOM COLORS

Filter

<input checked="" type="checkbox"/> Title	auto	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Owner	auto	<input checked="" type="checkbox"/>
<input type="checkbox"/> Review interval	auto	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edition	auto	<input checked="" type="checkbox"/>
<input type="checkbox"/> Revision	auto	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Tags	auto	<input checked="" type="checkbox"/>

SAVE CANCEL

You can set the column order and set an exact width for the column (default: Auto). You can also turn the filter option on or off for each column, meaning if the column should be used for filtering or not.

The Filters tab

This tab is used to set filter options if just some of the available processes should be displayed in this list.

Process Directory Settings

GENERAL COLUMNS FILTERS CUSTOM COLORS

ADD MORE FILTER

SAVE

CANCEL

1. Open the list to select type of filter.

Process Directory Settings

GENERAL COLUMNS **FILTERS** CUSTOM COLORS

Title


Owner

Edition

Revision

Revision interval

Tags



SAVE

CANCEL

2. The next step is to add details for the filter:

- **Title:** Type part of titles to filter on. Example: “dev” would show any process that has these letters in the title, for example Develop and development.
- **Owner:** Type a full name or part of a name.
- **Edition:** Select an edition number.


- **Revision:** Select a revision number.
- **Revision interval:** Select a number for the interval on which to filter.
- **Tags:** Select one or more of the available tags. (Available tags are set up centrally, see [Setup Quality Management](#).)











3. Click “Add more filter” to add more filter rows and.

To remove a filter row, click the dust bin.

Filtering is cumulative. An example: With this list (not filtered):

Process Directory


FILTER ▼

	TITLE	OWNER	TAGS
	Adventrix Group Main Process Map	Robert Johnson	
	Develop Human Resources	Robert Johnson	HR
	Develop Product	Robert Johnson	
	Develop Products	Robert Johnson	
	Develop process	Robert Johnson	
	Employee Evaluation	Robert Johnson	HR
	IT Onboarding New Employee	Robert Johnson	IT
	Idea Management	Robert Johnson	
	Manage Business	Robert Johnson	
	OSM process	Robert Johnson	

< 1 - 10 >

If the following filters are added:

Process Directory Settings

GENERAL COLUMNS **FILTERS** CUSTOM COLORS

Title

dev

Tags

HR

ADD MORE FILTER

SAVE

CANCEL

The result could be this list:

Process Directory

Search

Q

FILTER ▼

	TITLE	OWNER	TAGS
DH	Develop Human Resources	Robert Johnson	HR
SD	Skills Development	Robert Johnson	HR

To be shown in this filtered list, a process must contain dev or Dev in the title, AND be tagged with HR.

The Custom Colors tab

You should primarily set colors through Theme colors in Omnia Admin (System/Settings/Default colors). If you still would like custom colors for the control, you can set them using this tab.

Process Directory Settings

GENERAL

COLUMNS

FILTERS

CUSTOM COLORS

Background color

Text color

Border color

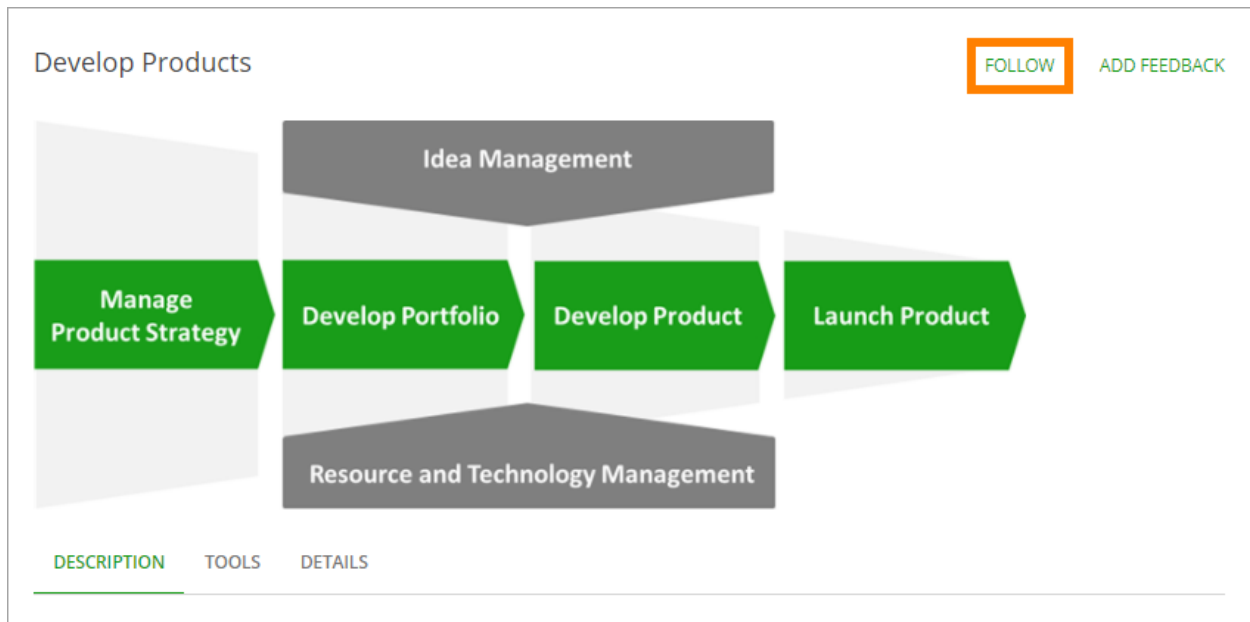
#fff

SAVE

CANCEL

My Processes

Users can follow (and unfollow) processes using this control.



A “My processes” control can be added to any Quick Page as a block, to show the list of the processes the logged in user follows.

Here’s an example of a My processes list, from a users point of view:

My Processes	
DP	Develop Product
P	Projektplanering
MP	Main Process
HM	Haldex - Main
DP	Develop Products

The user can click a link to go to the process.

There are no settings for the control.

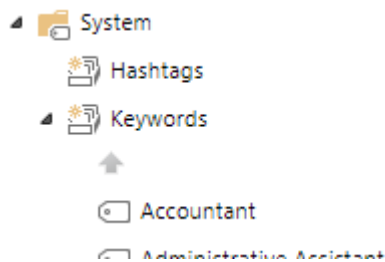
1.7.4 Setup Quality Management

Prerequisites

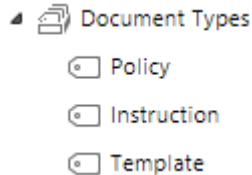
Note! In order to be able to run any Quality Management features, the extension Omnia.QMS needs to be installed.

Set up Term Sets

1. Go to SharePoint Admin Center > Term Store.
2. Copy the Term Store Id to Notepad for later use.
3. Navigate to the built-in Keywords term set located under System.



4. Copy the Keywords term set id to Notepad for later use.
5. If you already have a term set for Document Types setup, go to step 7.
6. Create a new term set for Document Types.



7. Copy the Document Types term set id to Notepad for later use.
8. Go to Omnia Admin > System Extensions.
9. Click on Omnia.QMS and set the values:
 - term store id
 - term set id for document type
 - term set id for tags and search tags

Core Feature

1. Go to Omnia Admin > Features.
2. Activate the tenant feature “Omnia QMS Core”.

Setup Process Authoring Site

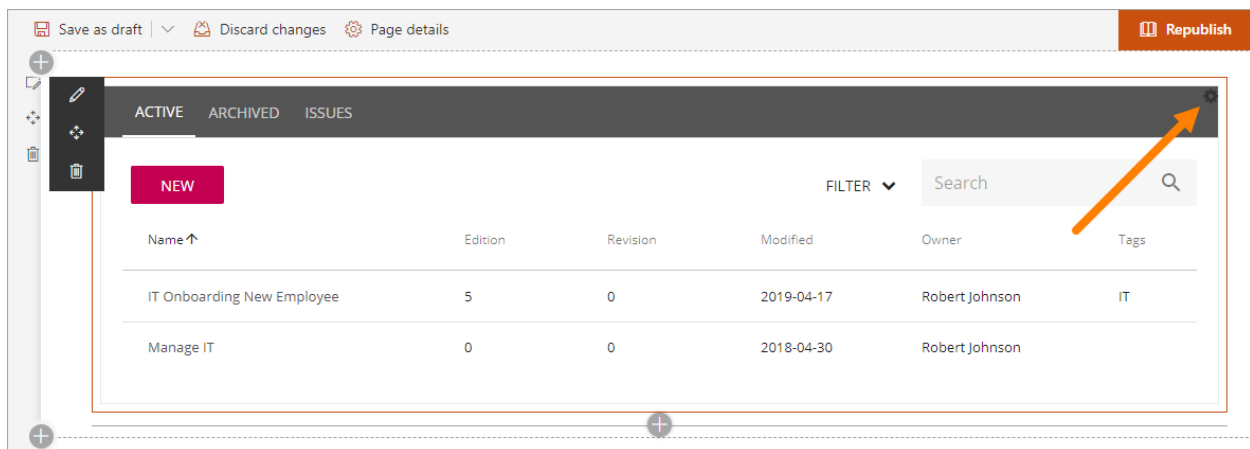
1. Create a new Team Site.

2. Go to Omnia Admin > Features.
3. Activate the site collection scoped feature “Omnia QMS Process Authoring Infrastructure”.
4. Activate the site scoped feature “Omnia QMS Process Authoring Site”.

Associate a SharePoint Task list with a Process library

It is possible to associate a SharePoint Task list with the Process library (in the Process Authoring Site). If a Task list is associated, actions in issues will become SharePoint tasks.

1. Go to the Process Library.
2. Click “Edit”.
3. Click the settings icon.



4. Select “Tasks” or “Document Tasks” for “Task List”.

Process List Settings

Tools Library URL

☒ Default URL

☐ Specify an URL

https://adventrixgroup.sharepoint.com/sites/it-department/T

Task List

Document Tasks

Tasks

1.7. Quality Management

SAVE

CANCEL

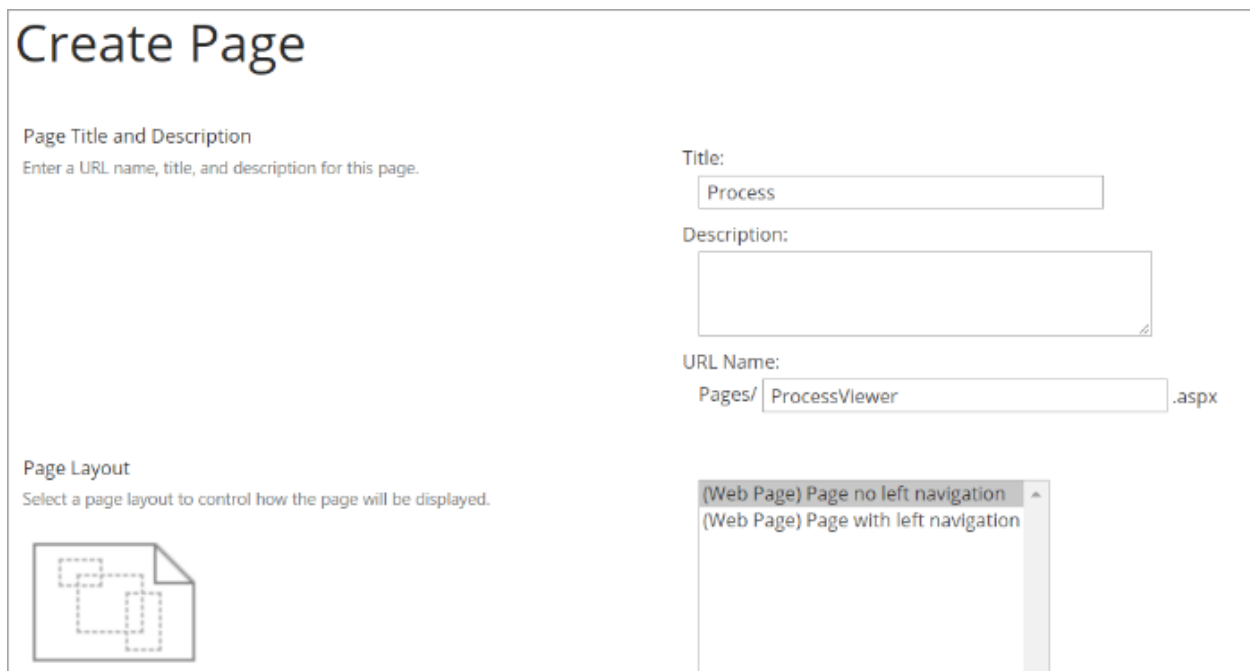
(To not associate with a Task list, “Task List” should be empty.)

5. Save.

Setup Process Viewer

To setup a Process Viewer, do the following:

1. Go to the start page of the main publishing site.
2. Go to Site Contents > Pages.
3. Create a new Web Page.



Create Page

Page Title and Description
Enter a URL name, title, and description for this page.

Title:
Process

Description:

URL Name:
Pages/ ProcessViewer .aspx

Page Layout
Select a page layout to control how the page will be displayed.

(Web Page) Page no left navigation
(Web Page) Page with left navigation

4. Publish the page.
5. Go to the page using its quick page url. Example: <https://customer.sharepoint.com/#!/Pages/ProcessViewer.aspx>.
6. Go into edit mode using the Edit Switch and add a Process Viewer to the page configured accordingly.

×

Process viewer settings

General

Graph

Left navigation

Custom Colors

Published process Id

Process step breadcrumb setting

☒ Show

☐ Hide

Start link

Start

https://customer.sharepoint.com

☒ **Show Controlled Documents**

Save

Close

7. Open Manage Content and create a new page in the content structure called Process Directory.

×

Process Directory Settings

General

Columns

Filters

Title

Processes

Process viewer page

https://customer.sharepoint.com/#/Pages/ProcessViewer.aspx

Storage site URL

☐ Current site

☒ All sites

☐ Specific site

https://customer.sharepoint.com

Number of items per page:

20

☒ Show filter

☐ Open process with new tab

Save

Close

Process Directory Settings

General

Columns

Filters

<input checked="" type="checkbox"/> Title		auto	▼	Filter <input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Owner		auto	▼	Filter <input type="checkbox"/>
<input type="checkbox"/> Review interval		auto	▼	Filter <input checked="" type="checkbox"/>
<input type="checkbox"/> Edition		auto	▼	Filter <input checked="" type="checkbox"/>
<input type="checkbox"/> Revision		auto	▼	Filter <input checked="" type="checkbox"/>
<input type="checkbox"/> Tags		auto	▼	Filter <input checked="" type="checkbox"/>

Save

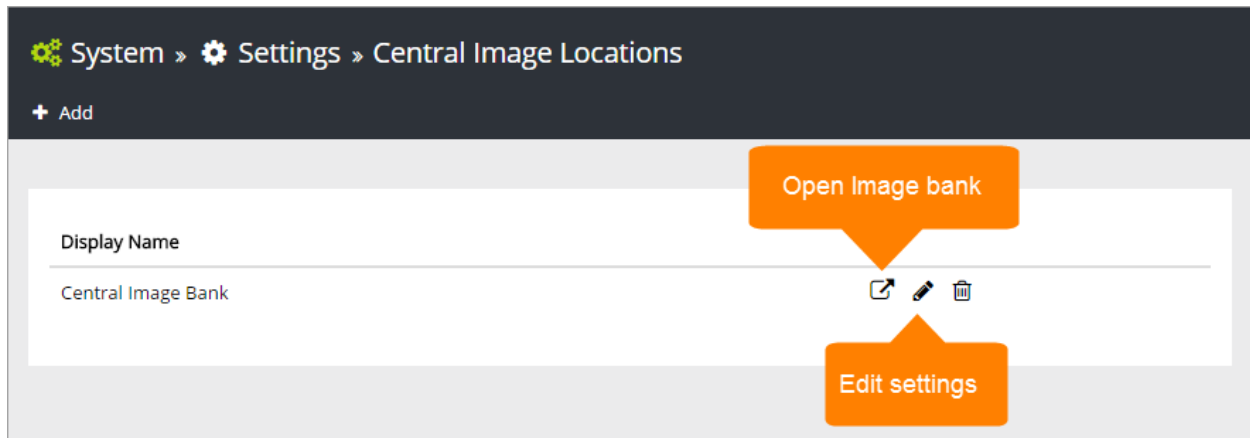
Close

1.8 Tenant Administration

1.8.1 Central Image Locations

You can set central image locations for the editors to use. Normally the editors can't upload images to a Central Image Location, or set image renditions, only use images from there. You find the settings in Omnia Adm.

One or more locations can be set up in the list.



To add a new Central Image Location, click “Add” and use the following settings:

Add Central Image Location

Url to Image library

Resolve



Display Name

Save Close

- **Url to Image Library:** Type or paste the Url here.
- **Display Name:** Add the name to be shown in the lists.

1.8.2 Color Themes

Set the default colors in Omnia using these options. You find them in Omnia Admin under System/Settings/Default colors.

 System »  Settings » Default Colors

Default Colors Setting

Theme Colors

Primary	<div>#212761</div>
Accent	<div>#c30052</div>
Dark	<div>#212121</div>
Dark Contrast	<div>#757575</div>
Light Contrast	<div>#bdbdbd</div>
Light	<div>#FFFFFF</div>

Theme colors is the primary source for colors. The colors you set here will be applied everywhere in the tenant. “Primary” and “Accent” is the two theme colors that is the most important. The Accent color is used for action links.

If you would like different colors for some controls you can set them there. If you don’t set Custom colors for a control, the theme colors will be used.

Under “Custom colors” you can set additional colors if needed.

Custom Colors

#000000

▼

#ffffff

▼

#216130

▼

#212761

▼

▼

Add

All the colors you set here, both Theme colors and Custom colors, will be available in the lists for selecting Custom colors for controls. Here's an example from the settings for Current Navigation.

×

Current Navigation Settings

General

Custom Colors

Border Color

Background Color

Active Background Color

Hover Background Color

Text Color

#212121

#c30052

#757575

#FFFFFF

#bdbdbd

#000000

#ffffff

#216130

#212761

Save

Close

1.8.3 Omnia Features

Here all Omnia Site collection features and Site features are listed. It's used for activation and installation of features, normally by a programmer.

Note that permissions to handle features (activate, deactivate etc) is set on the "Permissions" page under "System", and only Site Collection Features and Site Features are applicable for this documentation. Only Global Administrators can see and edit Tenant scoped Omnia Features.

Also note that the Features admin page is context sensitive. What will be displayed as on or off relates to the current site. A number of features is part of Omnia Foundation, see:

Site Collection scoped Omnia Features

Omnia Aggregated Content Web Parts Deploys web part definitions of the following Omnia Controls to the web part gallery:

- Announcements
- Last Updated Documents
- My Tasks

Omnia Core Image Renditions Deploys the following image renditions to the site collection:

- 1001 Landscape
- 1002 Square
- 1003 Portrait
- 1004 Landscape (small size)

Omnia Core Master Page Deploys the Omnia master page “portal.master” to the site and remote event receivers to apply the master page to sub sites created. This master page is required for the Omnia features such as Omnia Controls, javascript and CSS to function correctly.

Omnia Document Management Archive Site Deploys the Archive Site for Omnia Document Management. Note that only one such site should exist per Site Collection.

Omnia Document Management Authoring infrastructure Deploys the required artifacts (content types, site columns etc) on site collection level necessary in order to work with controlled documents.

Omnia Document Management Web Parts Deploys the Controlled Documents Viewer web part to the site collection. Site scoped Omnia Document Management Features

Omnia Enable External Sharing Activates the possibility to share the contents of the site collection to external users. It will take central settings, which may prohibit external sharing, into consideration.

Omnia Intranet Aggregated Calendar Web Part Deploys a web part definition of the Omnia Control “Aggregated Calendar” to the web part gallery.

Omnia Intranet Banner Web Part Deploys a web part definition of the Omnia Control “Banner” to the web part gallery.

Omnia Intranet Content Management Requires the SharePoint Publishing Infrastructure to be activated. Deploys the necessary infrastructure for publishing functionality in Omnia. Deploys the following page layouts to the master page gallery:

- News article
- News start page

Deploys the content types:

- News Article
- News Start Page

Omnia Intranet My Links Web Part Deploys a web part definition of the Omnia Control “My Links” to the web part gallery.

Omnia Intranet News Deploys the necessary infrastructure for news. Deploys the web part definition of the Omnia Control “News Viewer” to the web gallery. Deploys the following page layouts to the master page gallery:

- News article
- News start page

Deploys the content types:

- News Article
- News Start Page

Omnia Intranet Quick Polls WebPart Deploys a web part definition of the Omnia Control “Quick Polls” to the web part gallery.

Omnia Legacy Support Omnia Legacy Support can be turned off by deactivating this Feature. This will disable all code running Angular and decrease the javascript load times. **Important note!** Any custom extensions built on Angular will stop working if legacy mode is turned off. If Legacy Support is turned off, the following two Site Features needs to be updated: “Omnia Glue Site” and “Omnia Core Master Page”.

Omnia Site Directory Web Part Deploys web part definition of the Omnia Control “Site Directory” to the web part gallery. **Omnia User Feed Web Part** Deploys a web part definition of the Omnia Control “User Feed” to the web part gallery.

Site scoped Omnia Features

Omnia Document Management Authoring site Deploys the required artifacts (document libraries, controls etc) on site level necessary in order to work with controlled documents.

Omnia Document Management Create Document Wizard Deploys the Omnia Create Document Wizard. When this feature is activated, the Omnia Wizard replaces the standard options for “New” in classic Documents libraries and “Add” in Controlled Documents libraries.

Omnia Intranet News Center Turns the site into a News Center. Deploys a new welcome page to the site with the News Start Page layout. Deploys the Enterprise keywords column to the pages library and sets the default value to the Article column to [today]. Enables Contact, Article Date and Enterprise Keywords in view and edit mode. Sets the navigation on the site to structured navigation.

Omnia Intranet Social Makes comments and likes available in pages on the site.

Omnia Intranet Team Site – Announcements Deploys an announcements list to the site. Permission will be broken on the list and the members group will have edit access to the list. The “Recent” node in quick launch will be removed.

Omnia Intranet Team Site – Calendar Deploys a calendar to the site. The “Recent” node in quick launch will be removed.

Omnia Intranet Team Site – Contacts Deploys a contacts list to the site. The “Recent” node in quick launch will be removed.

Omnia Intranet Team Site – Controlled Documents Deploys a document library specifically designed for controlled documents. Minor/Major versioning will be added to the library. Permission will be broken on the list. A SharePoint group “Controlled Documents Readers” will be added to the site and be given read access to the library. Everyone except external will be added to this readers group. The owners group will be the only group with contribute rights on the library. The “Recent” node in quick launch will be removed.

Omnia Team Site – Is Member Makes the site available for the “Is Member” filter in the My Sites control. The “Recent” node in quick launch will be removed.

Omnia Intranet Team Site – Links Deploys a links list to the site. The “Recent” node in quick launch will be removed.

Omnia Intranet Team Site - Microsoft Teams Icon When this feature is activated, an icon indicates if a Team Site is attached to a Microsoft Teams group. This is shown in My Sites and in the Site Directory.

Omnia Intranet Team Site – Reporting Documents Deploys a document library specifically designed for reporting documents. Minor/Major versioning will be added to the library. Permission will be broken on the list. A SharePoint

group “Reporting Documents Readers” will be added to the site and be given read access to the library. The owners group will be the only group with contribute rights on the library. The “Recent” node in quick launch will be removed.

Omnia Intranet Team Site – Tasks Deploys a tasks list to the site. The “Recent” node in quick launch will be removed.

Omnia Intranet Team Site - Yammer Icon When this feature is activated, an icon indicates if a Team Site is attached to a Yammer group. This is shown in My Sites and in the Site Directory.

Omnia Intranet Team Site - Yammer Web Part Makes it possible to deploy the new Yammer Modern Web Part to the welcome page of a modern team site.

1.8.4 Intranet Core Settings

The Intranet Core Settings are found under System-Settings-Intranet Core in Omnia Admin.

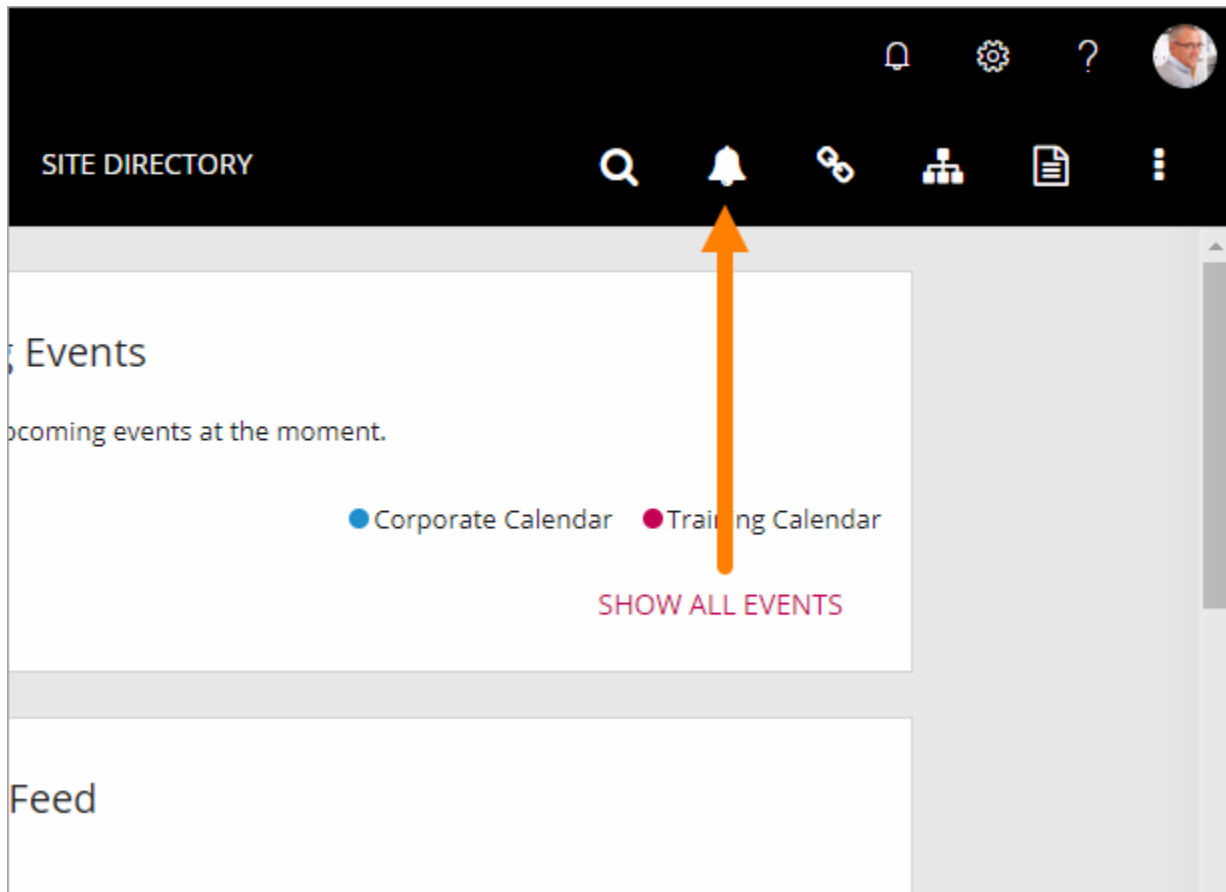
Intranet Core Settings

Name	Value	
Disable e-mail notifications on comments	False	Save
Enable Header Notification Panel	True	Save
Enable Sharing through Yammer	False	Save
Localization Languages (separated by semicolon)	en-US	Save
Managed Property For Link Icon	omilinkicon	Save
Media Picker Max File Size (KB)	2048	Save
People Term Group Name	People	Save
Use New Media Picker	True	Save

- **Disable e-mail notification on comments:** To send an e-mail notification to the page author or not when a user adds a comment.
- **Enable Header Notification Panel:** To be able to add an icon in the header, for access to the Notification Panel, set this option to “True”.
- **Enable Sharing through Yammer:** To activate Yammer Sharing, set this to True. See below for more information.
- **Localization Languages:** Add all Localization Languages here.
- **Managed Property for Link Icon:** Select Managed Property for the icons indication attached Yammer or Teams groups in My Sites and Site Directory.
- **Media Picker Max File Size:** The file size entered here triggers the message “The image is too big” when a user uploads a file using the Media Picker.
- **People Term Group Name:** As it says.

- **Use New Media Picker:** Select to use the new Media Picker or the older version that is called “Image Picker”.

When Header Notification Panel is active (True), an icon is placed in the Header:



Setup sharing with Yammer

You can setup the share feature on a page to allow sharing to Yammer. Do the following:

1. Go to Intranet Core Settings.
2. Set “Enable Sharing through Yammer” to “True” and save the change.

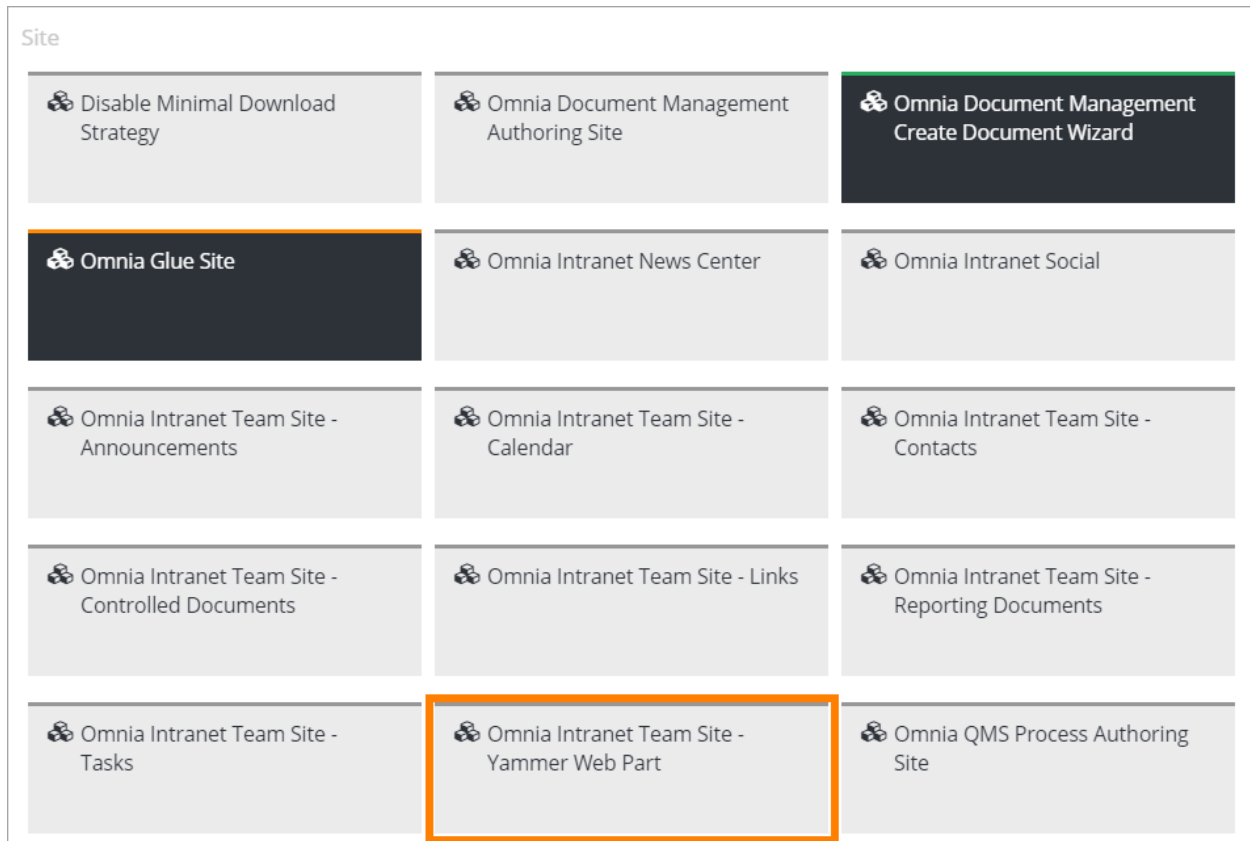
Intranet Core Settings

Name	Value	
Disable e-mail notifications on comments	False	Save
Enable Sharing through Yammer	True	Save
Localization Languages (separated by semicolon)	en-US	Save
Media Picker Max File Size (KB)	2048	Save
People Term Group Name	People	Save
Use New Media Picker	True	Save

Now a new button will appear on pages that makes it possible to create a new post in Yammer.

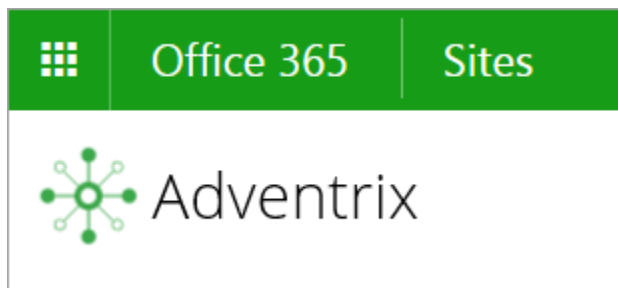
The screenshot shows a SharePoint intranet page for 'Adventrix | SharePoint'. The navigation bar includes links for START, ABOUT US, HOW WE WORK, OUR PRODUCTS, MY EMPLOYMENT, SITE DIRECTORY, and DOCUMENT CENTER. The main content area features a news article titled 'Huge success at the HRR Conference' by Jörgen Bjerkesjö, dated January 8, 2019. The article text is partially visible, mentioning 'This years exhibition in Tampa just beats the records for p...'. A 'SHARE' button is located at the bottom of the article. An overlay window titled 'Share on Yammer' is open, showing the article's URL and a 'Post' button. An orange arrow points from the 'SHARE' button on the article to the 'SHARE' button on the Yammer overlay.

A new site scoped feature also becomes available, that makes it possible to deploy the new Modern Web Part to the welcome page of a modern team site.

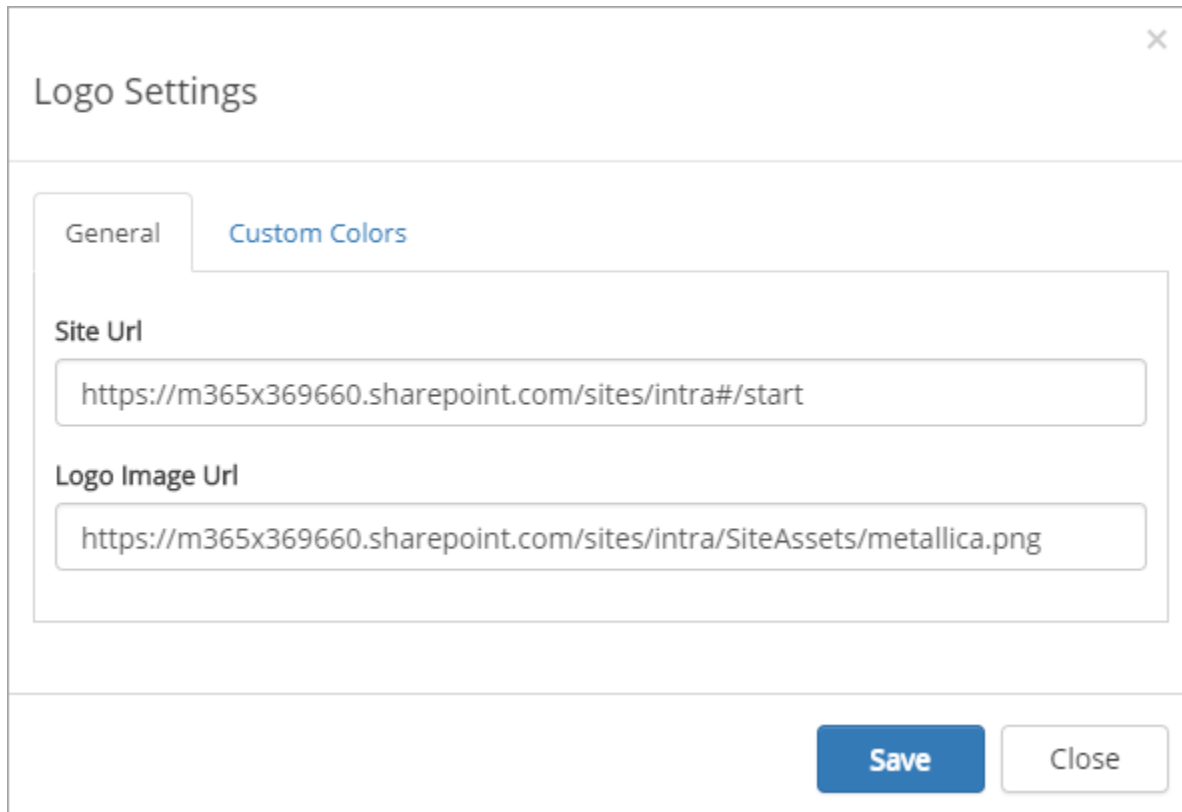


1.8.5 Logo

The Logo control makes it possible for the end user to go back to the start page of the portal. The logo settings are master page scoped. All sites using this master page will inherit the settings. The logo is shown across all Sharepoint sites in Omnia.



The settings for the control contains the following:



Logo Settings

General Custom Colors

Site Url

https://m365x369660.sharepoint.com/sites/intra#/start

Logo Image Url

https://m365x369660.sharepoint.com/sites/intra/SiteAssets/metallica.png

Save Close

- **Site Url:** Defines where to go when the user clicks on the logo image.
- **Logo Image Url:** Url to the logo image. Make sure all users that should be able to access to portal have read access to the image.
- **Custom colors:** You should primarily set colors through Theme colors in Omnia Admin (System/Settings/Default colors). If you still would like custom colors for the control, you can set color of the header area that spans the logo and search box on this tab.

Logo Settings

General Custom Colors

Background Color

#bdbdbd

Preview

METALLICA

Save Close

1.8.6 Microsoft 365 Integration

SPFx Integration

To be able to run Omnia in modern pages (SPFx), the Omnia SPFx Integration app needs to be installed in the app catalog and a specific feature needs to be activated on site collection level.

Follow these steps to enable Omnia in modern pages.

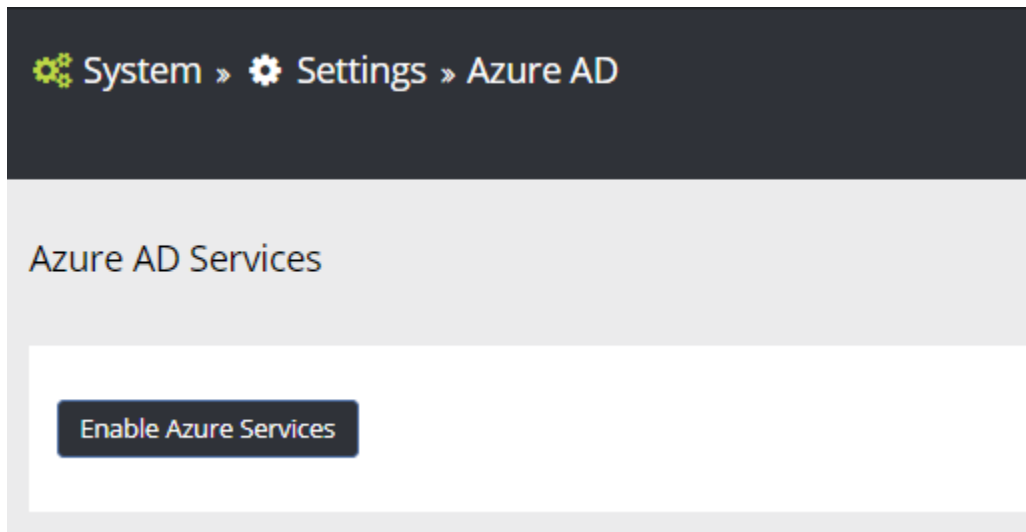
1. Go to Omnia Admin > System and note down the Omnia Foundation Url.
2. Send an e-mail to your support contact for Omnia and request the correct “Omnia SPFx Integration” app file for the Omnia cloud you are connected to.
3. The support contact will send you an e-mail with an sppkg file attached.
4. Go to SharePoint Admin Center > Apps > App Catalog.
5. Go to Apps for SharePoint and upload the sppkg file. Make sure to check the box “Make this solution available to all sites in the organization” and deploy.
6. Now you are ready to deploy the new header. Go to Omnia Admin > Features.
7. Activate the tenant scoped feature “Omnia Modern Header”. Once this feature is activated, all sites will by default not support legacy Omnia components anymore (which is still the majority of all components in Omnia except the new header). Activate the site collection feature “Omnia Legacy Support Site” for all sites that need to run legacy Omnia components. (Some Omnia features will make sure to do this automatically).

8. Upgrade the site collection scoped feature “Omnia Core Master Page” on all site collections that needs upgrade.
9. Upgrade the site scoped feature “Omnia Glue Site” on all site collections that needs upgrade.
10. Activate the site collection feature “Omnia SPFx Infrastructure” on all sites where you want to enable support for the new header in modern pages and lists. (Also remember to add this feature to any Site Template that you have that will create modern team sites).

(In order for the new Omnia Block web part to be available, you need to upgrade to the Omnia SPFx Integration app with version 1.1.0.0)

Azure AD Services

To be able to utilize features outside SharePoint, such as Planner, Teams and Yammer, an Azure AD app needs to be enabled in the solution.



To enable Azure Services you need to be logged in as a Global Administrator in Microsoft 365.

1. Go to Omnia Admin > System > Settings > Azure AD.
2. Click on Enable Azure Services.
3. You will be redirected to a page where you need to accept that Omnia can perform certain activities in your tenant.



Permissions requested

Accept for your organization

Omnia Foundation Auth
preciofishbone.se

This app would like to:

- ✓ Read all groups
- ✓ Read and write all groups
- ✓ Sign in and read user profile

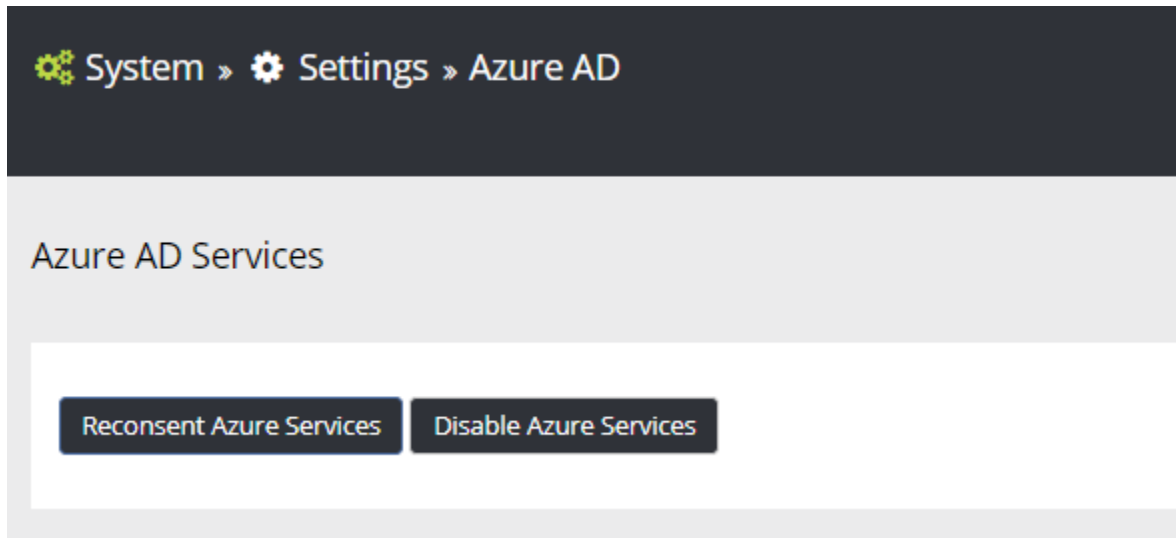
If you accept, this app will get access to the specified resources for all users in your organization. No one else will be prompted to review these permissions.

Accepting these permissions means that you allow this app to use your data as specified in their terms of service and privacy statement. **The publisher has not provided links to their terms for you to review.** You can change these permissions at <https://myapps.microsoft.com>. [Show details](#)

Cancel

Accept

If you want to disable the Azure AD Services integration, you can go back to Omnia Admin > System > Settings > Azure AD and click on the button “Disable Azure Services”.













1.8.7 Omnia Profiles

You can use this Omnia Adm settings to split a tenant into different profiles. Profiles can be used to create different publishing portals for different needs, for example Intranet and Extranet or profiles for different companies sharing the same tenant.

A screenshot of the 'Omnia Profiles' settings page. The header shows 'Omnia Profiles' with a book icon. Below the header, there are three tabs: 'Add Omnia Profile', 'Default Mapping', and 'Current Site Mapping'. The 'Current Site Mapping' tab is active. The main content area displays a table with two columns: 'Title' and 'Profile Site Collection Url'. The table lists five profiles: 'Personalhandboken', 'Intranet', 'Extranet Landing Site', 'Extranet Admin', and 'Extranet'. Each row has edit and delete icons on the right.

Title	Profile Site Collection Url	
Personalhandboken	https://m365x167835.sharepoint.com/sites/personalhandboken	
Intranet	https://m365x167835.sharepoint.com/sites/intra	
Extranet Landing Site	https://m365x167835.sharepoint.com/sites/customer-portal	
Extranet Admin	https://m365x167835.sharepoint.com/sites/customer-portal-admin	
Extranet	https://m365x167835.sharepoint.com/sites/extranet	

The list displays all current profiles. Use the icons to edit or delete a profile.

Omnia Profiles		
+ Add Omnia Profile % Default Mapping % Current Site Mapping		
Title	Profile Site Collection Uri	
Personalhandboken	https://m365x167835.sharepoint.com/sites/personalhandboken	 
Intranet	https://m365x167835.sharepoint.com/sites/intra	 
Extranet Landing Site	https://m365x167835.sharepoint.com/sites/customer-portal	 
Extranet Admin	https://m365x167835.sharepoint.com/sites/customer-portal-admin	 
Extranet	https://m365x167835.sharepoint.com/sites/extranet	 

You can add new profiles here, set default mapping and set current site mapping.

Add a new profile

When you create a new profile you use the following fields:

Omnia Profiles » [+ Add Omnia Profile](#)

Title

Description

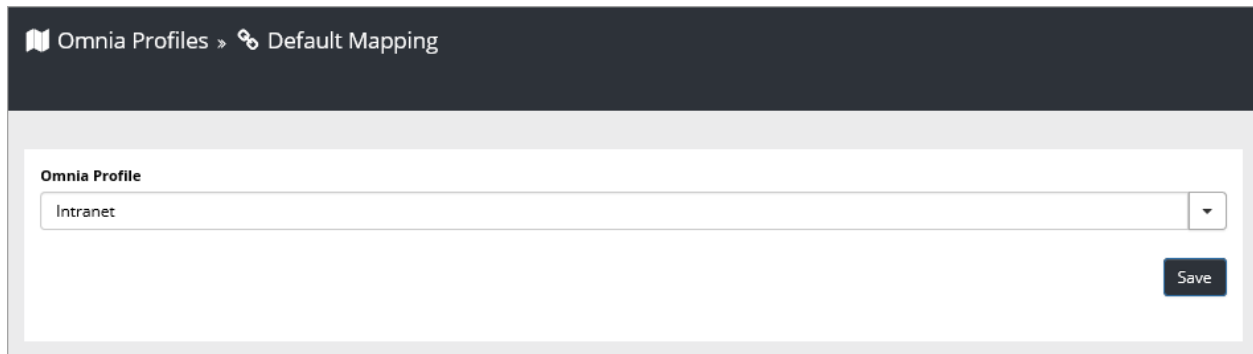
Profile Site Collection Uri

Create

- **Title:** A name for the profile.
- **Description:** A description, if needed.
- **Profile Site Collection URL:** The URL to the main site for this profile.

Default Mapping

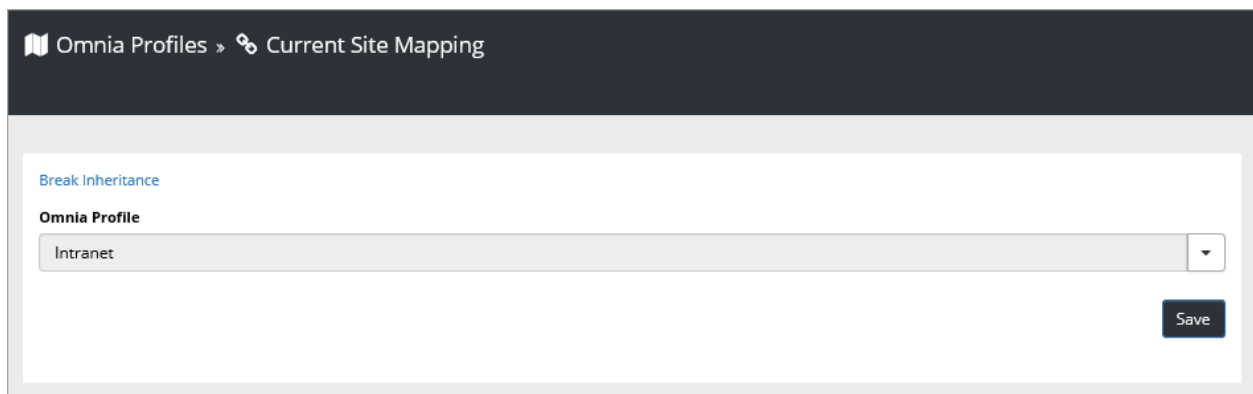
Set the Default Mapping here. When a new team site is created it will inherit the Default Mapping and for example display the top navigation from that Site Collection.



To map the new team site to another profile, use “Current Site Mapping”.

Current Site Mapping

Use this setting to map the current site to any profile you have created.



If the default mapping is active, as it is in the image above, you must always first brake the inheritance, and then select another profile.

1.8.8 Targeting Definitions

Omnia Targeting Definitions can be used for Banners, Important Announcements, Common Links and News.

Note! Targeting works a bit differently for Common Links and News and other web pages on one hand, and for Important Announcements and Banners on the other. For Important Announcements and Banners, all target definitions are available. For Common Links, News and other web pages, you have to decide which target definition to use.

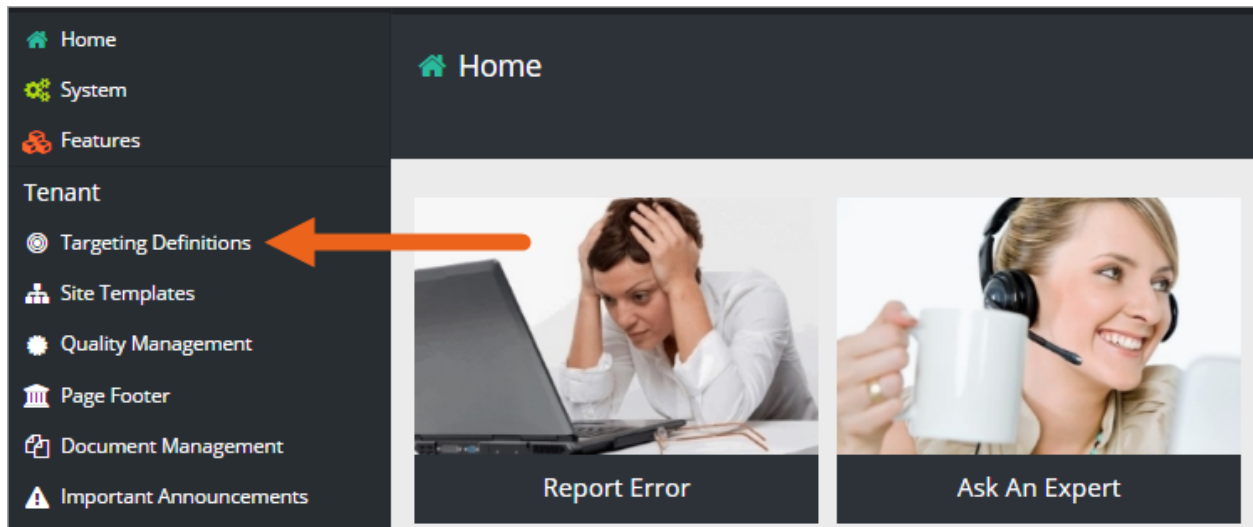
The Targeting Definitions that should be possible to use is set up here. This will result in one or more fields to use for targeting by the editor or administrator creating the banner, important announcement etc.

There's two main approaches, either you create a Targeting Definition for a user profile and tie that definition to a term set or part of a term set (the term set must already exist). The result will be one ore more fields where the editor can select terms for targeting. A suitable example could be if targeting should be possible to one or more countries or locations.

The other approach is to create target groups for example based on AD groups or other permission groups available.

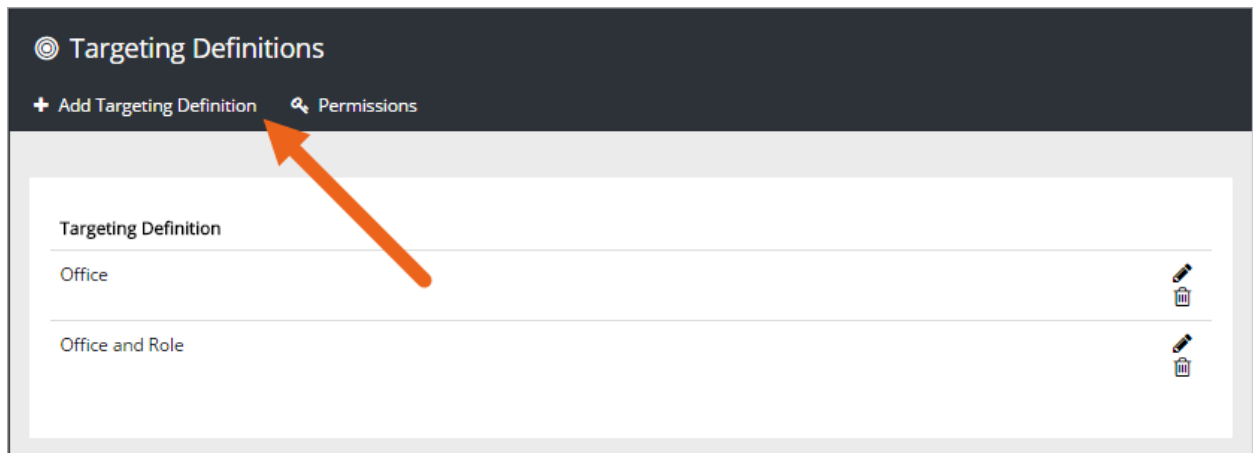
Create a new Targeting Definition

1. Open Omnia Admin and go to “Targeting Definitions”.

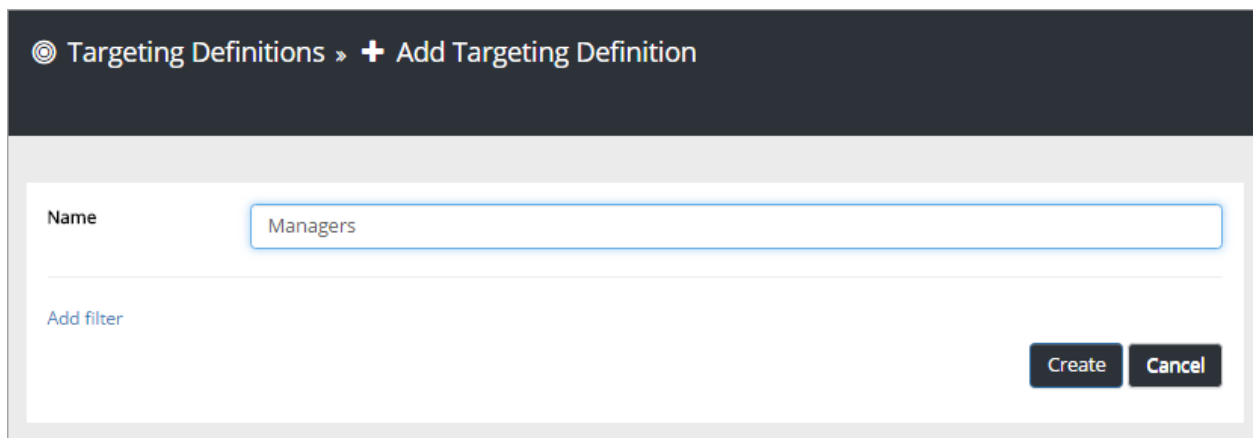


The list of existing definitions is shown.

2. Click “Add Targeting Definition”.



3. Type an internal name for the definition and click “Add filter”.

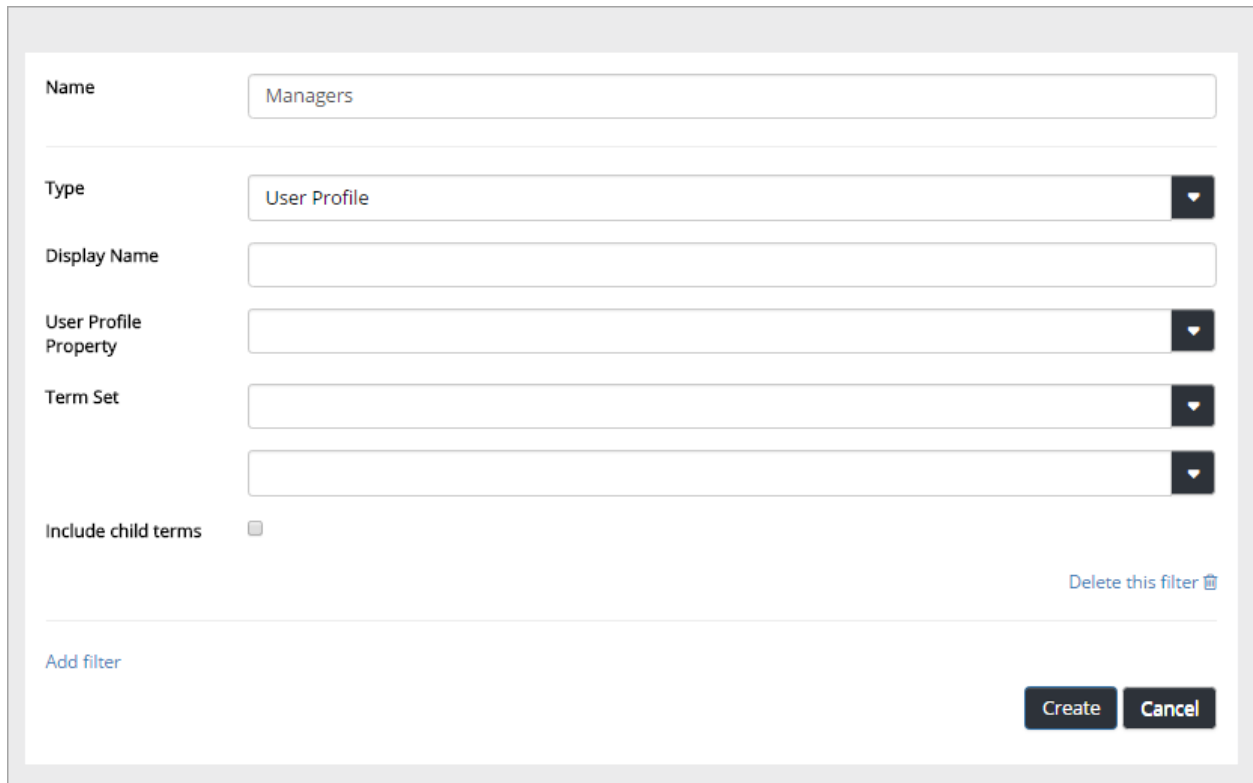


4. Select type. You can use either a User Profile property or a Group Membership.

The available fields for settings change accordingly.

User Profile Definitions

If you choose the type “User Profile”, the following can be set:

A screenshot of a web form for defining a user profile. The form is enclosed in a light gray border. It contains several input fields and dropdown menus. The 'Name' field is a text box with 'Managers' entered. The 'Type' field is a dropdown menu with 'User Profile' selected. The 'Display Name' field is an empty text box. The 'User Profile Property' field is a dropdown menu. The 'Term Set' field is a dropdown menu. Below these fields is a checkbox labeled 'Include child terms' which is unchecked. To the right of the checkbox is a link 'Delete this filter' with a trash icon. At the bottom left is a link 'Add filter'. At the bottom right are two buttons: 'Create' and 'Cancel'.

- **Display name:** The field name the editor or administrator will see.
- **User Profile Property:** Select the User Profile property to be used, from the properties available.
- **Term Set:** Select term set to use. Then select term to set. Note: the term set must have been set up, you can't do it from here.
- **Include child terms:** If the term set includes child terms you can set this. If not selected the term selection must be specific. In an example with the term Country with a number of cities as child terms, if the option is selected just the country needs to be chosen.

Group Membership Definitions

If you choose the type “Group Membership”, the following can be set:

Name

Type

Display Name

Mappings

[Add mapping to list](#)

[Delete this filter](#)

[Add filter](#)





[Create](#) [Cancel](#)

- **Display name:** The field name the editor or administrator will see.
- **Mappings:** You can set up a number of mappings, each mapping as a row in the mapping list. Create a mapping this way:
 1. Type a name (Group Mapping Title) for the mapping.
 2. Use the next field to add one a group.
 3. Click “Add mapping to the list”.

For additional mappings, repeat the process. If needed you can set up several mappings with the same name and you can set use a group in several different mappings (ie with different names).

Edit or delete a targeting definition

Use the icons in the list to edit or delete targeting definitions:

Targeting Definitions	
+ Add Targeting Definition Permissions	
Targeting Definition	
Office	 
Office and Role	 

1.8.9 Tutorial Management

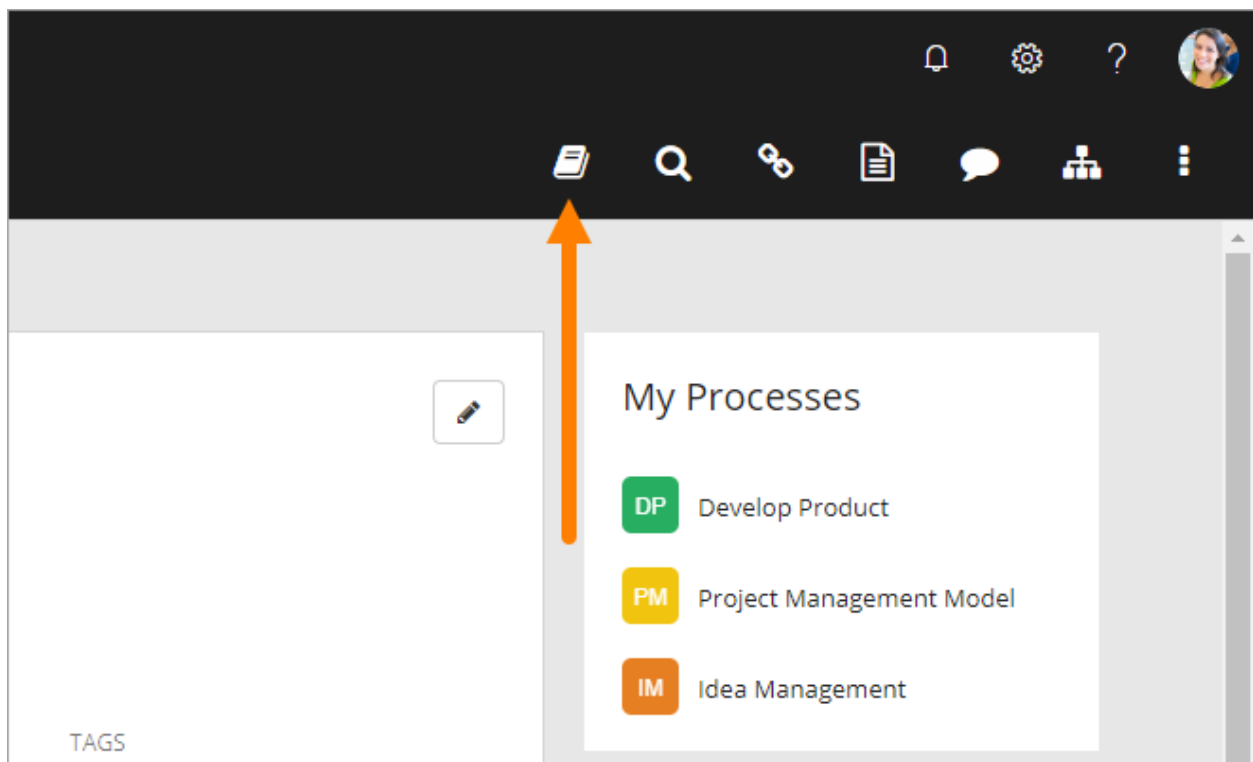
Setup Tutorials

1. Go to Omnia Admin > Features.
2. Activate the tenant scoped feature “Omnia Tutorial Core”.

An editor creates and edits tutorials for selected publishing pages. An administrator can manage tutorials for the tenant.

A user's options

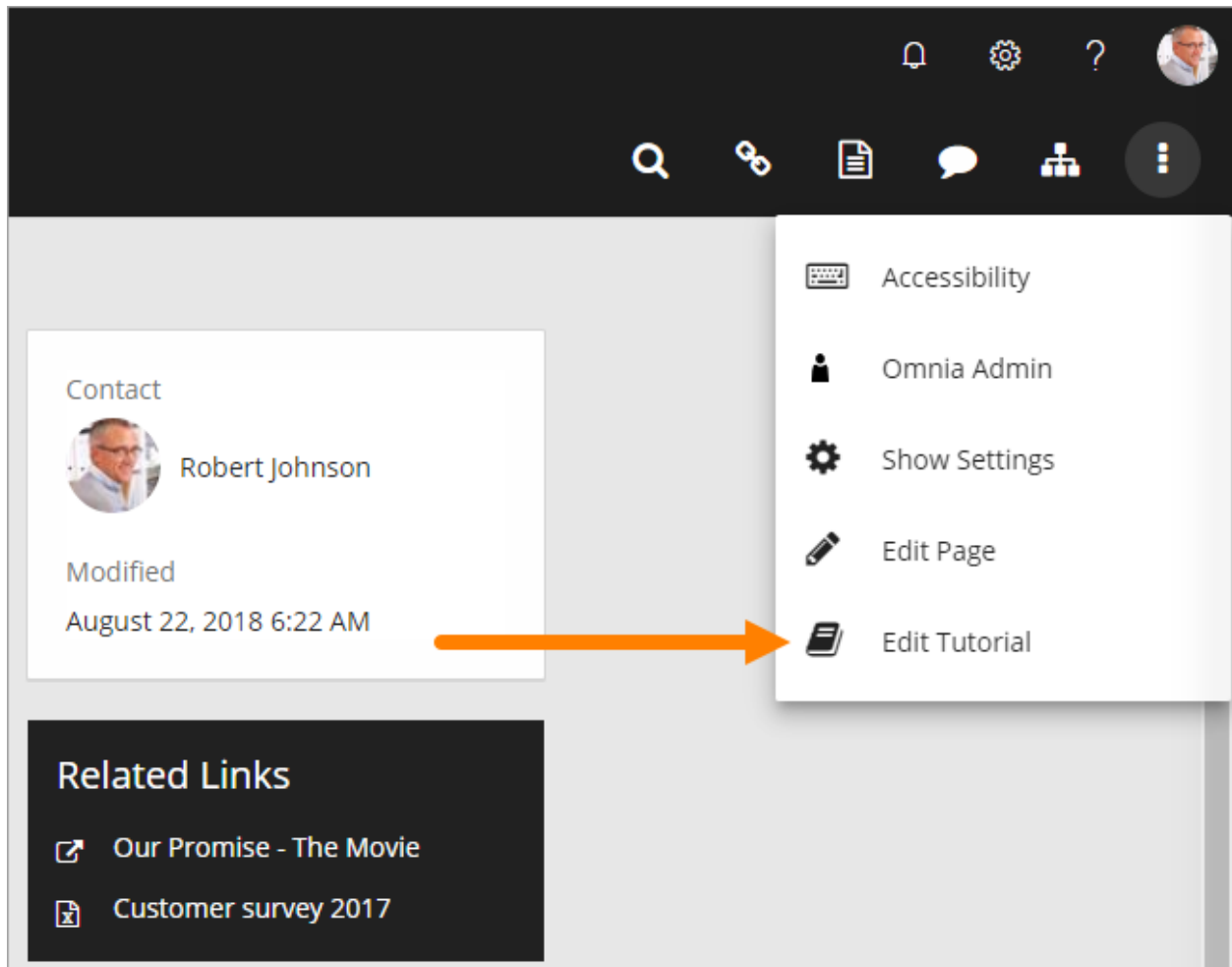
A tutorial can be set up to start automatically when a page is opened (see more info below). But if it's not, users select the “Tutorial” icon in the heading:



Editors options

An editor must have Edit Permissions to a page to be able to work with tutorials there. A tutorial is always created for a specific page, the first step for the editor is therefore to go the page.

The tutorial options are accessed by selecting “Edit Tutorial” in the Actions Menu.



The following options are then available (example with an existing Wizard tutorial):

Manage tutorial

Wizard

Reorder

<

Wizard

>


Title

Welcome to the Site Directory

Image

https://adventrix.sharepoint.com/sites/vnext/image-bank/Publishing/Images/A light weight MTB.jpg

Browse



Content

B *I* U “ Paragraph ▾
≡ ≡ ≡ ≡ ≡ ≡ ≡ ≡ ≡ ▾ ↶ ↷ 🔗 🏠 ☐ ▾ <>

This is the Site Directory in Adventrix.

+ Add step

🔍 Preview tutorial

Display mode ⓘ Start tutorial automatically ▾

Save

Close

Delete

When creating a tutorial, there can be either a Wizard or a Tooltip tutorial available for the page, so the first step is always to select this. If there is one type of tutorial and you select the other type, the tutorial will be saved as a new version, replacing the former.

Manage tutorial

☒ Wizard 

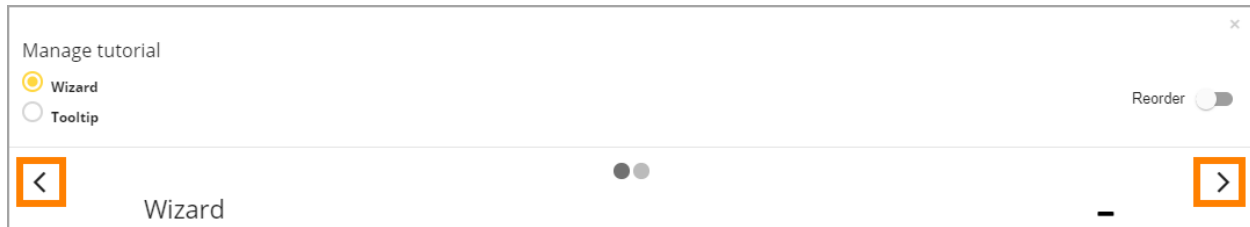
☐ Tooltip

Reorder 

Common options

The following options are available for both Wizard and Tooltip tutorials.

Use these icons to go to another Tutorial step:



The number of dots in the middle indicates the number of steps, in the example above, two.

The following fields and options are available for both types of tutorials:

- **Title:** Add/edit the title for the tutorial step.
- **Content:** Use this field to add a description. Note the bar with layout options.
- **Add step:** Use the button to add a new tutorial step after the last step.
- **Reorder:** Use this button to change the order in which tutorials steps are shown (handy if you have added a step that should go before any of the existing steps.)
- **Preview tutorial:** When you want to check how the tutorial will look for users, select this button.
- **Display mode:** Use the list here to decide how users should access the tutorial - “Start tutorial automatically”, “Show tooltip alert for new version” or “User starts tutorial manually”.
- **Save:** Use this button to save your work. Recommendation - save every time you are finished working on a tutorial step, before going to the next step.
- **Delete:** This button is used to delete the tutorial for the page. Note! The whole tutorial is deleted, just not the tutorial step. Also note that a tutorial can be deleted in the Tutorial Management in Omnia Admin, as well, see below.

Extra option for a Wizard tutorial

When working on a Wizard tutorial, you can add an image to a tutorial step (see example above). You can add/replace an image by clicking “Browse”. You can use any image from any Image Bank you have access to, and even upload an image, if needed.

Extra options for a Tooltip tutorial

To create a tooltip step, do the following:

1. Click the “Add step” button.
2. Click on a position on the page to add a tooltip for.
3. Add a Title and a description (in the Content field).

In the “Selector” field you can see an indication of where the Tooltip step will be placed.

Manage tutorial

Wizard
Tooltips

Reorder

Tooltip

Title Search for sites

Content

B I U Paragraph [List icons] [Link icon] [Grid icon]

Use the Search option to find any site you have access to.

Selector .mat-input-infix

+ Add step 🔍 Preview tutorial

Display mode Start tutorial automatically ▼ Save Close Delete

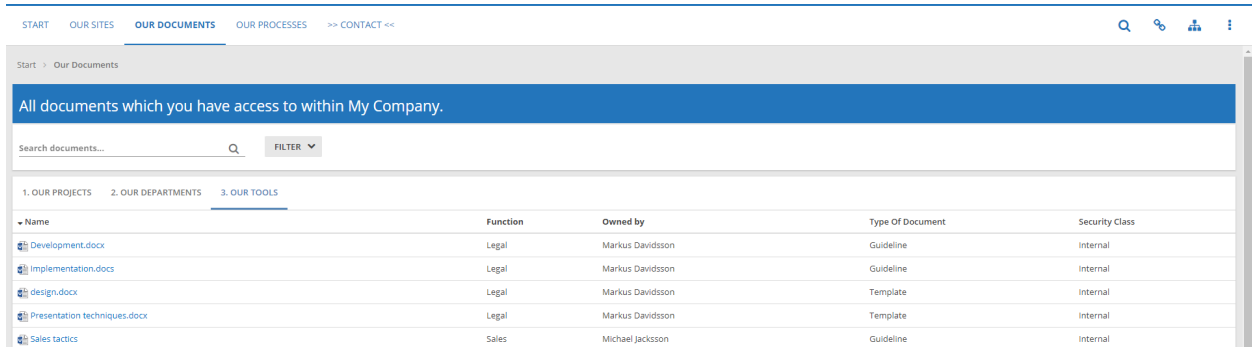
Administrator options

The administrator options are found in Omnia Admin:

All tutorials created in the tenant are displayed in a list, for example:

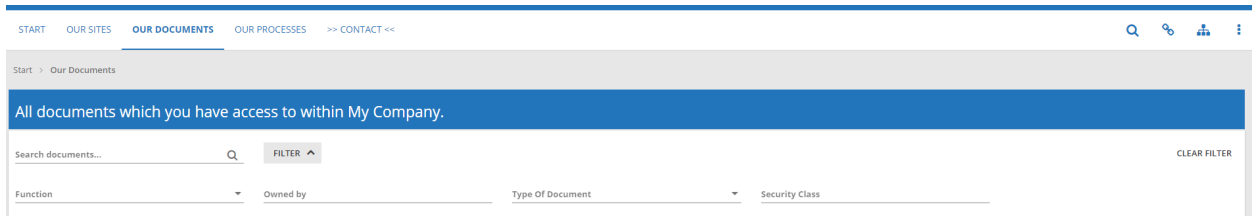
Document Searchpage

Projectsites provides the ability to view and access all the documents that have created using projectsites in a straight forward way.



Here we can see all the documents that have been created using project sites, as well as the metadata that these documents have been tagged with. This user has chosen to create three maps with the names our projects, our departments, our tools and specify which documents they should contain.

We also have the option to include a search bar to search for specific document among all projects, which is helpful when dealing with a large amount of documents. There is also a filtering option that can be used to view documents of a specific tag/metadata:



Here we can filter the documents by function, owned by, type of document and security class. These metadata fields have been specified by the user to be included in all documents that are created using projectsites.

Configuration

The search page functionality comes with multiple configuraion options that can be used to personalize and improve the user experience:

Search Component

General **Fields Config** UI Settings

☒ **Enable Tabs**

1. Our Projects X 2. Our Homesites X 3. Our Tools X

Site Templates

Grouping

Free Text Search Field **Compact Mode** ☒

Filename

☒ **Check search text from url**

k

Item Per Page

20

☐ **Open File By Office Online**

☒ **Notify On Non Result**

Save Close

- Enable tabs allows for the document maps to be visible for the user. The tabs shown will be dependent on which site template the user selects in the site template input field.
- Grouping allows the user to group documents based on a specific metadata.
- Compact mode gives the search field a more compact feel and look. It is used in image number two, and without it the search functionality will look as following:

All documents which you have access to within NAViQ.

Search documents... CLEAR FILTER SEARCH

Business Unit	Project	Location	Segment	Modified By
DD	Security	TG	Function	

1. OUR PROJECTS 2. OUR HOMESITES 3. OUR TOOLS

- Free text search field allows the user to choose in which way they would like to search for a document, whether it be by file name or by some other metadata.

- Item per page decides how many items will be shown per page.
- Open file by office online gives the option to open a selected file by the office online products.
- notify on non results notifies the user if their search gave no results.

Searchpage also allows the user to select which columns with field data should be shown and even create new fields:

Search Component

General Fields Config UI Settings

Field	Show	Filter	Edit
Filename	<input type="checkbox"/>	<input type="checkbox"/>	Edit
Project Info	<input type="checkbox"/>	<input type="checkbox"/>	Edit
Business Unit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit
Business Area / Business Unit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit
Project	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit
Location	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit
Segment	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit
Project Status	<input type="checkbox"/>	<input type="checkbox"/>	Edit
Project Owner	<input type="checkbox"/>	<input type="checkbox"/>	Edit
Modified By	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit
DD	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit
Security	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit
TG	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit
Function	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit
Owned by	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit
Process Step	<input type="checkbox"/>	<input type="checkbox"/>	Edit
Site Url	<input type="checkbox"/>	<input type="checkbox"/>	Edit
Type Of Document	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit
Path	<input type="checkbox"/>	<input type="checkbox"/>	Edit
Security Class	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit

Add New Field Config

Save Close

Here we can both select the fields that we would like to be displayed. We can also choose if they can be included in the filter, as well as actually edit their configuration. Field detail allows the user to also select which maps the field will be displayed in:

Field Detail

Display Name
Security

Managed Name **Sortable** ☐ **Type**
owstaxId0XPSecurityClassX MetaData ▼

TermSet Id
c66eBB67-12a4-4eed-b191-e60beca7d33f

Select Template For Field
1. Our Projects X 2. Our Homesites X

Site Templates

Save Delete Cancel

Like most other Omnia products, the searchpage's userinterface can be configured to change the colors and style of:

Search Component

General **Fields Config** UI Settings

☒ Using System Theme

Group Header Color #2375bb ▼ **Group Header Text Color** #212121 ▼

Style Padding CSS Text **Filter Field Width(%)**
20

Save Close

Document Management

Projectsites also provides the ability to manage documents using metadata.

Moscow Department

Search

Open Share Copy link Download Delete Flow Pin to top Move to Copy to Rename

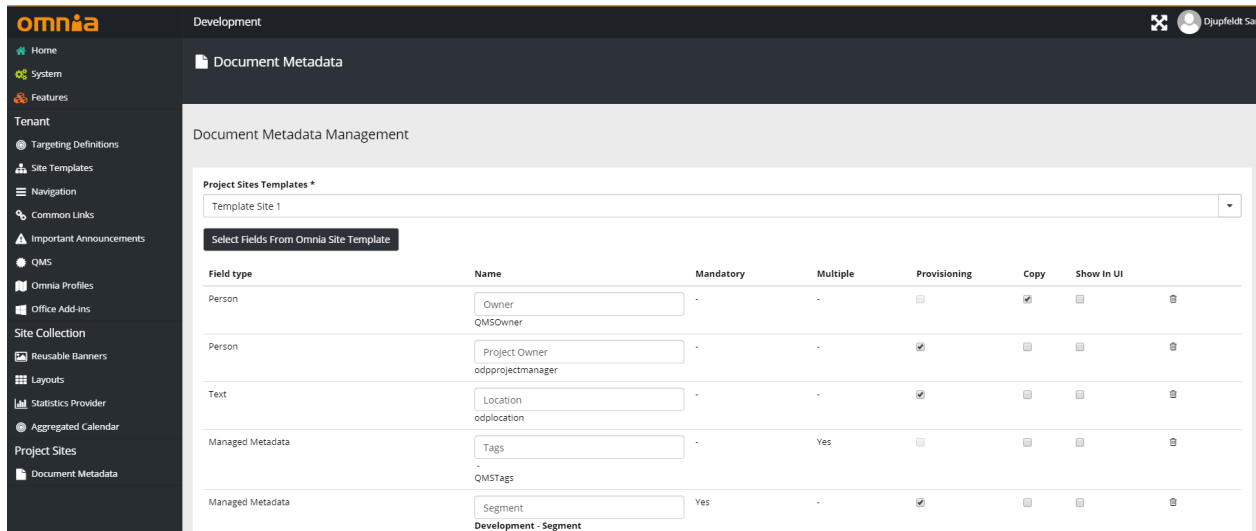
1 selected

Documents > 2 - Software > 2.1 - Research > 2.1.1 Project Dev

Name	Modified	Version	Modified By	Status	GG	Security Class	Viewed Status	Function	Owned By
Arkiv	1 January, 2015	1.0	Markus Davidsson						
JacksonDoc.pptx	11 April, 2017	1.0	Markus Anvidsson	None	Yes	Open	N/A	N/A	
Implementation.pptx	15 April, 2015	1.0	Markus Bjork	None	No	Open	N/A	N/A	

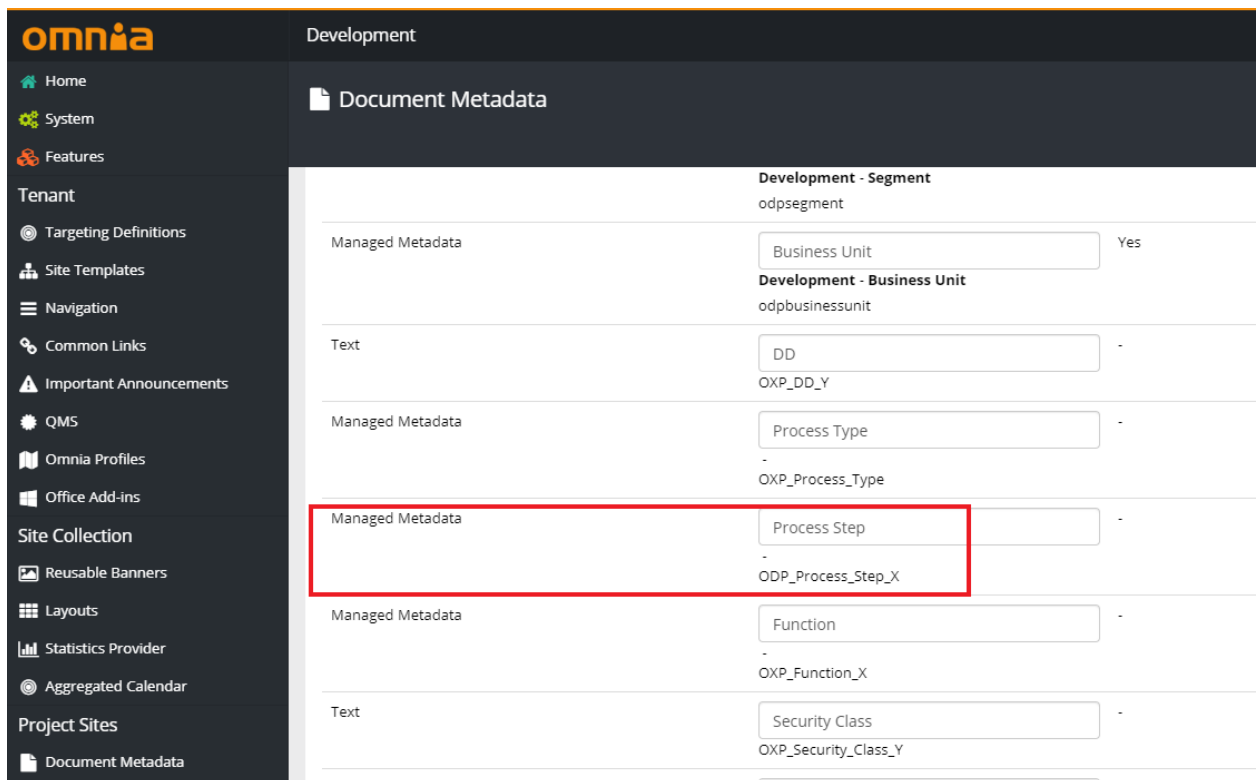
Usually once the document is uploaded by a user, the user has to then tag the documents with different tags in order

to simplify the search and sort of these documents, which can in of itself be a complicated process. With project-sites we simplify this by using columns as seen above in order to sort document by their metadata, which is specified by the user in the Document Metadata functionality that is found in Omnia Admin.



Field type	Name	Mandatory	Multiple	Provisioning	Copy	Show In UI
Person	Owner QMSOwner	-	-	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Person	Project Owner odprojectmanager	-	-	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Text	Location odplocation	-	-	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Managed Metadata	Tags QMSTags	-	Yes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Managed Metadata	Segment Development - Segment	Yes	-	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Document metadata automatically gives each uploaded document by the tool viewer metadata that the user has defined. An example of how this is works is when the user provides a process step field in the document metadata.



Field type	Name	Mandatory	Multiple
Managed Metadata	Business Unit odpbusinessunit	Yes	-
Text	DD OXP_DD_Y	-	-
Managed Metadata	Process Type OXP_Process_Type	-	-
Managed Metadata	Process Step ODP_Process_Step_X	-	-
Managed Metadata	Function OXP_Function_X	-	-
Text	Security Class OXP_Security_Class_Y	-	-

The user then selects a process in the process viewer, and then uses the tool viewer to create a document. This Document will then have that process name in its metadata, and can then be filtered by it.

There is also the option to exclude folders that the administrator of the site does not want the user to be able to place documents in. This option can be found in Omnia Admin > System > Extensions > OmniaX.ProjectSites:

Name	Region	Description	Value	Included in Client
document metadata settings	templates		["id":1,"title":"Template Site 1","customFields":{"id":"9b1f1e8e-c980-4a24-b30d-..."}]	<input checked="" type="checkbox"/>
excludefolders	projectsiteconfig		["Content and Structure Reports","Form Templates","Images","Omnia","Pages","Process Tasks","Process Tools","Reusable"]	<input checked="" type="checkbox"/>

Project-sites Setup

Prerequisites

Note! In order to be able to use project-sites, you need to have the extension zip file OmniaX.ProjectSites.zip and have an Omnia QMS project already setup.

Install and Setup Project Sites

1. Go to Omnia Admin > System.
2. Register this extension. This is done by first registering the extensionId which can be found inside the zip file, under extension.json.
3. Go back to System > Extensions, and Upload the OmniaX.ProjectSites.zip file.
4. Once the file has been uploaded, make sure to fill in the processidtemplate1 field with the correct template it. It can be found in the process-viewer of your Omnia QMS site.

Testing Process FOLLOW ADD FEEDBACK

Project Plan... Design Implementat... Testing ExploratoryT... UniTesting

DETAILS

Owner	Version	Info
MOD Admi...	Edition 2	ID 97
	Revision 1	
	Modified 2019-04-17	

QMS TEST EXPORT PROCESS

5. Make sure to fill in the Omnia QMS site url, which is the site url of your Omnia QMS app that you wish to activate project-sites on.
6. Make sure to fill in the Omnia QMS web api url, which is the url of the server that your intranet is built upon. An example is <https://omniaext1.azurewebsites.net/api>.
7. Click save.
8. Go to Omnia Admin > Features.
9. Make sure that the following tenant scoped features are activated: - OmniaX Project Site Core - OmniaX ProjectSite-TenantBundle - Omnia Angular1 Support
10. Make sure that the following site collection scoped features are activated: - Omnia Core Master Page. - OmniaX Project Site Provision Document Fields. - Omnia Legacy Support. - Omnia SPFx Infrastructure. - OmniaX Project Site Provision Webpart.
11. Make sure that the following site scoped features are activated: - Omnia Team Site - Prerequisites - OmniaX Project Site - Example Site
12. Go To Omnia Admin > Site Templates > Add template.

The screenshot shows the 'Add template' form in the Omnia Admin interface. The form is for a 'Site Collection' and includes the following fields:

- Name:** Site template 1
- Language:** English (United States)
- Omnia Profile:** Intranet
- Base Template:** Team site (classic experience)
- Location:** /sites
- Description:** (Empty text area)
- Icon:** (Empty dropdown menu)
- Image:** (Empty text input field with a 'Browse' button next to it)

At the bottom right of the form, there are 'Save' and 'Cancel' buttons.

13. Name the template site template 1.
14. Make sure to have the language selected as your preferred language.
15. Make sure to choose the correct Omnia Profile for your intranet.
16. Make sure that the base template is Team site (classic experience).
17. Make sure that it has the correct location.
18. Go to the features tab and make sure that these Site Collection and Site features are checkmarked:

Site Collection

- ☒ OmniaX Project Site - Provision Document Fields
- ☒ Omnia Legacy Support
- ☒ Omnia SPFx Infrastructure
- ☒ OmniaX Project Site - Provision Webpart
- ☒ Omnia Core Master Page

Site

- ☒ OmniaX Project Site - Template Provisioning 1
- ☒ OmniaX Project Site - Ensure StartPage
- ☒ OmniaX Project Site - Copy WebParts
- ☒ OmniaX Project Site - Ensure Onenote Link

19. Go to the properties tab and add the properties you wish your project-site template to have. An example would be the following:

Edit Site Template

Site Collection Sub Site Office 365 Group

General Settings Features Properties

Field type	Name	Mandatory	Multiple	Filterable	Viewable
Person	Project leader	Yes	-	<input type="checkbox"/>	<input type="checkbox"/>
Date	Project Start Date	Yes	-	<input type="checkbox"/>	<input type="checkbox"/>
Yes/no	Archived	-	-	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Text		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Add

Save Cancel

20. Go to Document Metadata.

startOmnia

Home
System
Features
Tenant
Targeting Definitions
Site Templates
Navigation
Common Links
Important Announcements
Page Footer
QMS
Omnia Profiles
User Profiles
Tutorial Management
Site Collection
Quick Polls
Reusable Banners
Layouts
Content Management
Statistics Provider
Aggregated Calendar
Project Sites
Document Metadata

Home
Report Error
Ask An Expert
Suggest Improvement
Omnia Update
Release Notes
Training Material
Omnia Cloud Status
Roadmap
Documentation

21. Click on the Select Fields From Omnia Site Template button.

22. Select site template 1 that we created earlier.

×

Select Fields From Omnia Site Templates

Apply for template : QMS Site

Omnia Sites Templates *

News Center

News Center

Process Authoring Site

Site template 1

Save

Close

23. Select all the fields that we created earlier, then click save.

×

Select Fields From Omnia Site Templates

Apply for template : QMS Site

Omnia Sites Templates *

Site template 1

Field type	Name	Mandatory	Multiple	Select
Person	Projekttledare	Yes	-	<input checked="" type="checkbox"/>
Date	Project Start Date	Yes	-	<input checked="" type="checkbox"/>
Yes/No	Archived	-	-	<input checked="" type="checkbox"/>

Save

Close

24. The next step is to create a new site for our project sites. Go to the intranet homepage where you have your Omnia QMS setup and click on my sites button, then create new site.

25. Choose site template 1.

26. Enter Project Sites in the title field. You may enter an optional description to the site. When you are done, click next.

27. Fill in the fields of the properties that we have previously selected. Make sure to fill in the ones that are required, then click next.

28. In the owner field, enter the name of the site administrator.

29. In the members field, enter the name of the members that you wish to have the ability to edit the site.

30. in the readers field, enter the name of the members that will only be able to read the site, without having editing capabilities.

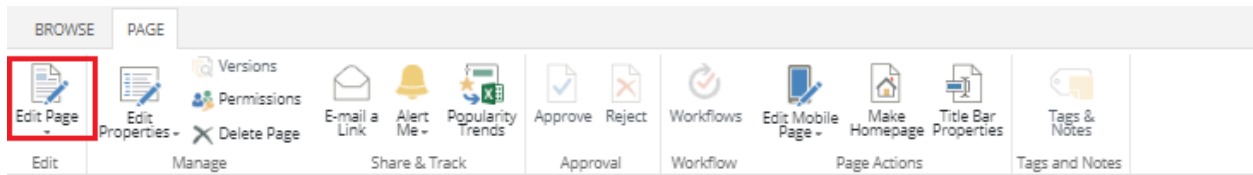
31. Click Create.

Project-sites web components

Project-sites has four major web components that can be used for the purposes of displaying documents and processes.

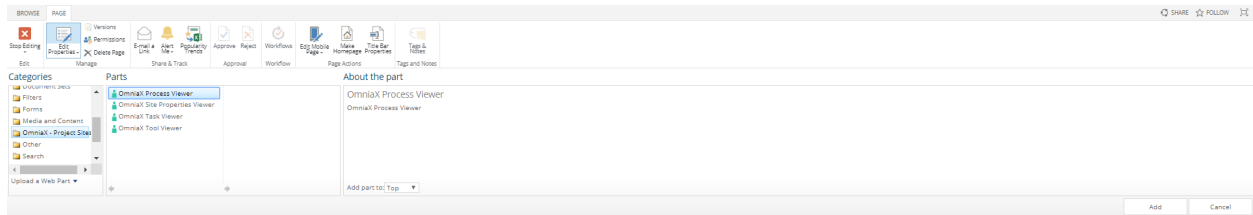
In order to access these components, follow these steps:

1. Go to the project-sites site that you have created in the project-sites setup step.
2. Click on the Edit Page button.



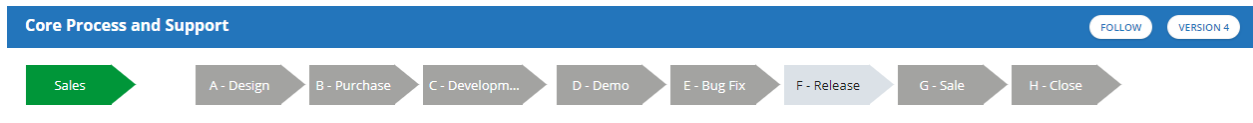
3. Click on Add a Web Part.

4. Scroll down through the folders in the Categories section to OmniaX - Project-sites, click on it and you will see the parts to the right.



OmniaX Process Viewer

Process Viewer is a tool that is used to view a process or multiple processes.



After adding it as a component, we can configure it using the following options:

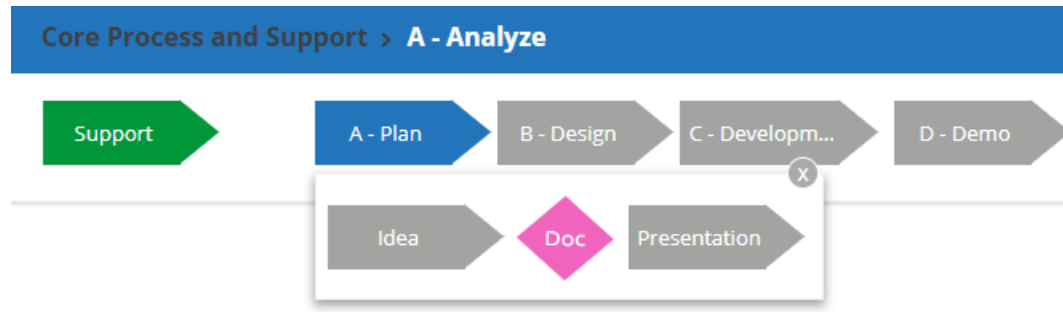
 A screenshot of the 'Process viewer settings' dialog box. The dialog has three tabs: 'General', 'Floating Panel', and 'UI Settings'. The 'General' tab is active. It contains the following sections:

- ProcessId**: A text input field.
- Process Type**: Three checkboxes:
 - ☐ Show Title For All Process Type
 - ☒ Auto expand child item when selected parent
 - ☐ Preview child process
- Style Padding CSS Text**: A text input field.
- Tabs Setting**: Four checkboxes:
 - ☐ Show Description Tab
 - ☐ Show Details Tab
 - ☐ Show Tool Tab
 - ☐ Show Task Tab

 At the bottom of the dialog are 'Save' and 'Close' buttons.

- in the processId section we will be adding the Id of our process that we would like to view in the process viewer.

- Show title for all process gives us the ability to show the title of our processes.
- Preview child process is allows us to preview the sub-process of a process as seen in the example below:

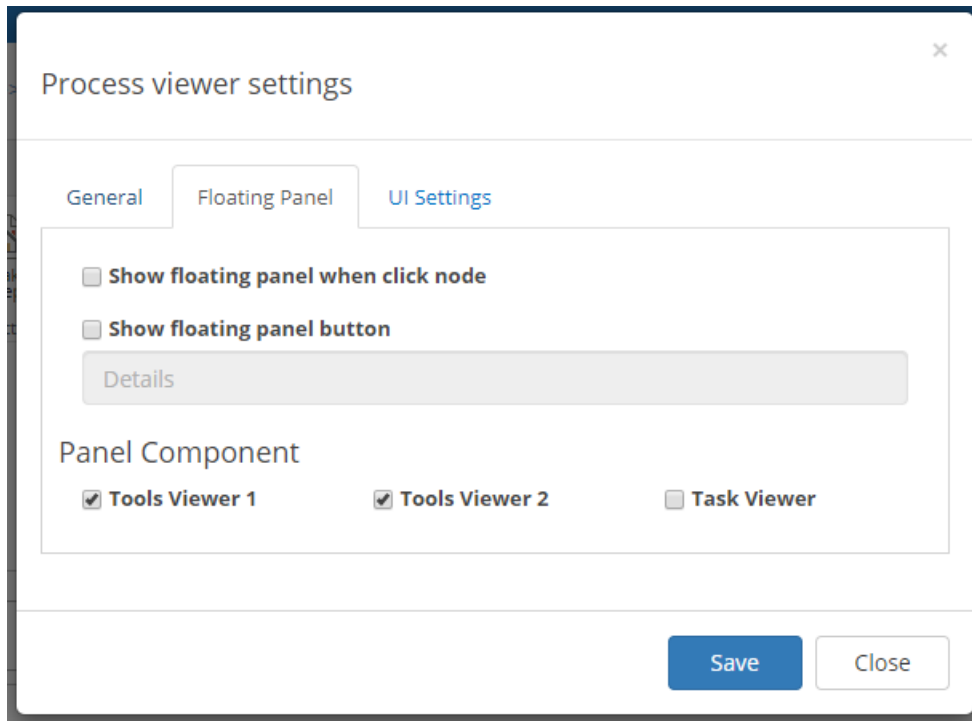


- Style Padding CSS Text is an option to add some style padding to the text.
- Tab settings - Show Description Tab is a function that allows us to see the description of a process.
- Tab settings - Show Details Tab is a function that allows us to see details and information about a process, and we also receive the option to export the process as we can see in the example below:

- Tab settings - Show Tool Tab allows us to preview the documents that are attached to a specific process as seen in the example below:

- Tab settings - Show Task Tab

The next step is to setup the optional floating Panel, which is



The process viewer also has the option of changing the colors of specific processes. The settings of this function can be found in the third tab that is called UI Settings.

Process viewer settings

General

Floating Panel

UI Settings

Border color

#fff

▼

Background color

#fff

▼

Active subprocess text color

#fff

▼

Active subprocess background color

#2375bb

▼

Inactive subprocess text color

#212121

▼

Inactive subprocess background color

▼

Finished Task Process Text Color

▼

Finished Task Process Background

▼

Active graph item color

#fff

▼

Inactive graph item color

#fff

▼

Active graph opacity

0,01

Active tab text color

#2375bb

▼

Icon color

#2375bb

▼

Action button color

#2375bb

▼

☒ Show Header Bar

Header Bar Background

#2375bb

▼

Header Bar Text Color

#404040

▼

Current Process Text Color

#fff

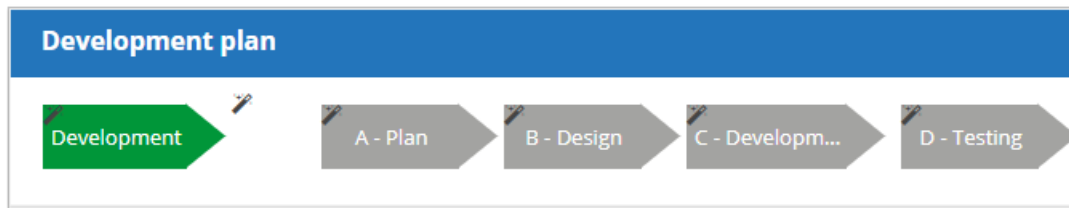
▼

☐ Custom Process Style

Save

Close

Here we can see and customize the colors of every part of the process viewer. At the bottom we can see a button with a checkmark box that is called Custom Process Style, which is a functionality that allows us to easily customize each process individually as seen in the example down below:



Once we click on the magic wand of the process that we would like to style, a process styling pop-up will be revealed. It allows the user to change the background color of the process, the text color and the size of the process component. The pop-up also contains an option that is called advanced mode, which allows the user to do all that was previously mentioned, but in CSS-code.

OmniaX Site Properties Viewer

Site properties viewer allows the user to display site properties that have been provided when creating the site.

The screenshot shows a 'PROJECT INFORMATION' header in a blue bar with a gear icon on the right. Below the header is a table with the following data:

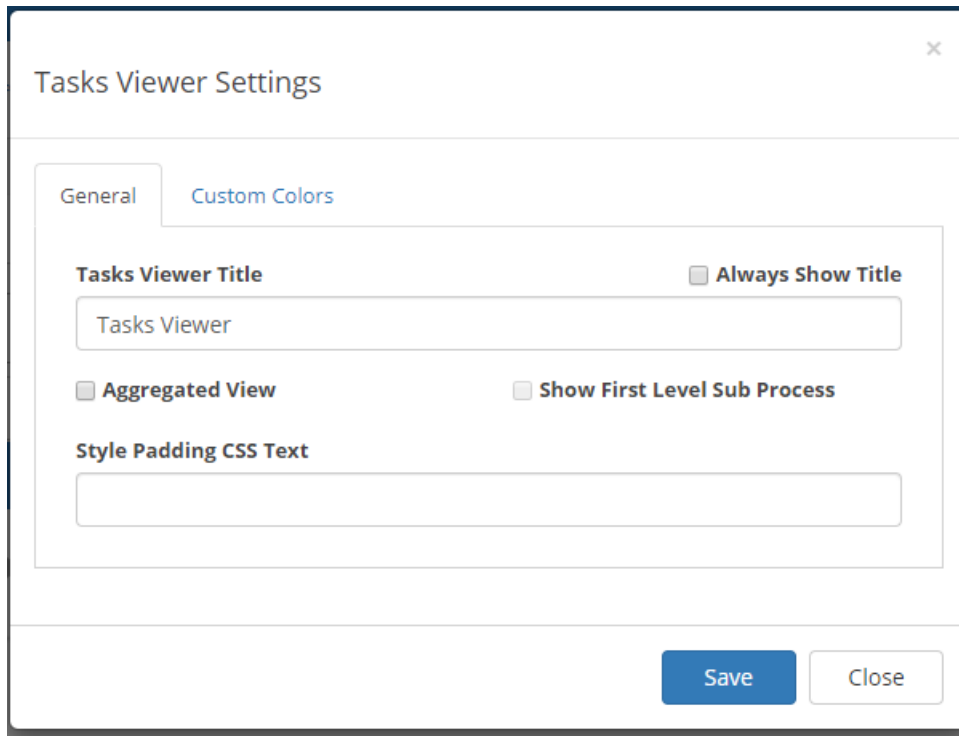
Business Unit	PD Sweden
Location	StockHolm
Segment	Other
Project Owner	
Project Status	Closing

At the bottom right of the table is a button labeled 'EDIT SNIPPET'.

These properties can also be found under Site Quick Edit > Site Properties. There is also the option to customise the site properties viewer colors in the custom colors tab that can be found in the viewer settings:

OmniaX Task Viewer

Task viewer is a component that allows the user to display tasks that are connected to the selected process. It provides the following options:







The image shows a 'Tasks Viewer Settings' dialog box with a close button (X) in the top right corner. It has two tabs: 'General' (selected) and 'Custom Colors'. Under the 'General' tab, there are four settings: 'Tasks Viewer Title' with a text input field containing 'Tasks Viewer' and an 'Always Show Title' checkbox; 'Aggregated View' checkbox; 'Show First Level Sub Process' checkbox; and 'Style Padding CSS Text' with a text input field. At the bottom right, there are 'Save' and 'Close' buttons.

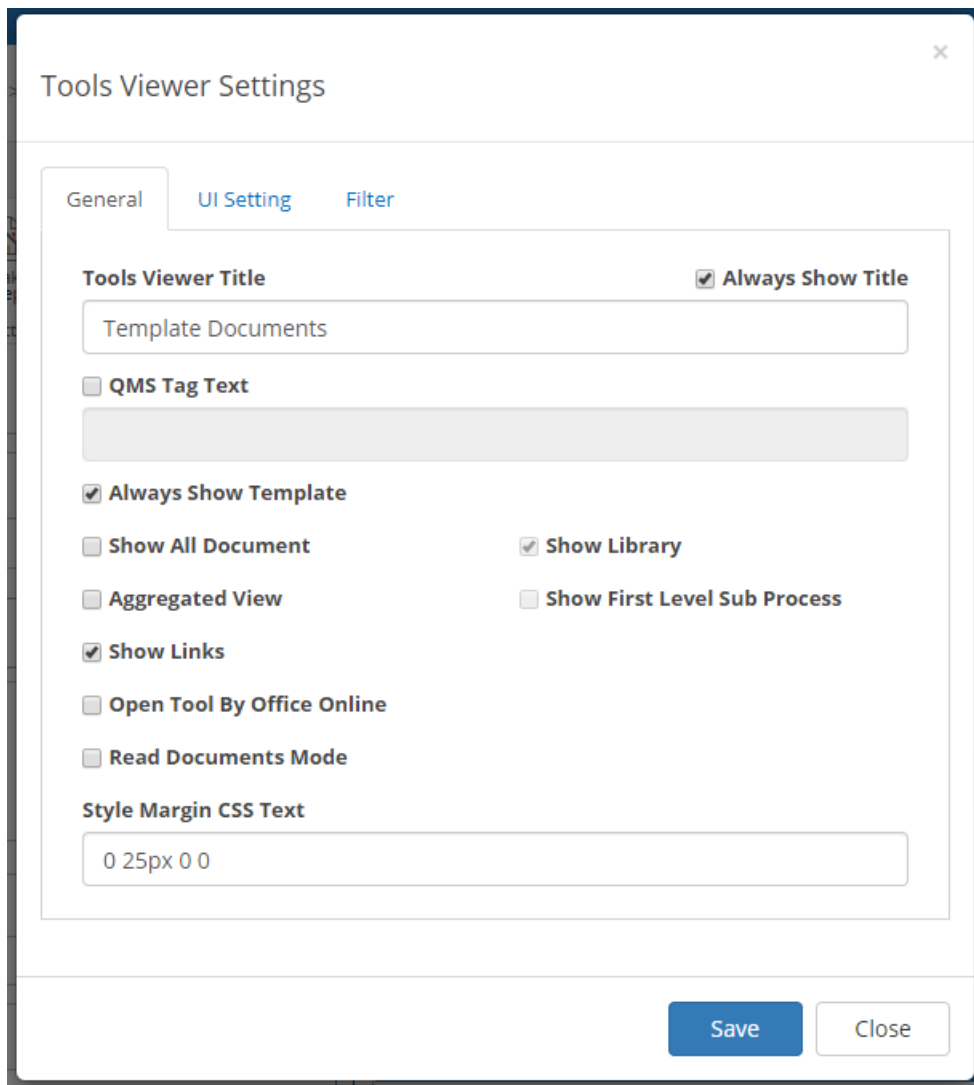
The task viewer settings provide the options of changing the task viewer title and how it should be displayed. It also provides an option for an aggregated view of the tasks, similar to that of the process tool viewer, as well as a CSS input field for padding the text. There is also settings to customise the colors of the task viewer in the Custom Colors tab.

OmniaX Tool Viewer

The tool viewer is a functionality that is used for managing documents that are connected to our processes.

TEMPLATE DOCUMENTS				
B - ACQUISITION (16) ▼				
	Plan Document	PD North Dakota - Template	Legal	Create ⋮
	Excel maps	Map - Template	Legal	Create ⋮
	Insurance	Norway - Template	Legal	Create ⋮
	Alternative Insurance	Denmark - Template	Legal	Create ⋮

Along side the process tool, we can also view which heading and 33fgfunction the documents belong to. The tool viewer has multiple configurations and options:



The image shows a 'Tools Viewer Settings' dialog box with a close button (X) in the top right corner. It has three tabs: 'General' (selected), 'UI Setting', and 'Filter'. Under the 'General' tab, there are several settings:

- Tools Viewer Title:** A text input field containing 'Template Documents' and a checked checkbox for 'Always Show Title'.
- QMS Tag Text:** A disabled text input field.
- Always Show Template:** A checked checkbox.
- Show All Document:** An unchecked checkbox.
- Show Library:** A checked checkbox.
- Aggregated View:** An unchecked checkbox.
- Show First Level Sub Process:** An unchecked checkbox.
- Show Links:** A checked checkbox.
- Open Tool By Office Online:** An unchecked checkbox.
- Read Documents Mode:** An unchecked checkbox.
- Style Margin CSS Text:** A text input field containing '0 25px 0 0'.

At the bottom right, there are 'Save' and 'Close' buttons.

- Tools Viewer Title allows us to select the title of our tool viewer and gives the option to always display it or not.
- Show all documents displays an expandable tab at the end of the tool viewer that allows us to see the documents that are attached to the other processes, and not only the currently selected process:



- The show library function is connected to show all documents, as it is required in order to display which libraries all the documents are sorted in.
- Aggregated view allows the user to remove the fold/unfold documents tab that also displays the name of the sub-process the documents belong to, and instead show all the documents that belong to the selected process, including the documents that belong to any sub-process of the selected process:

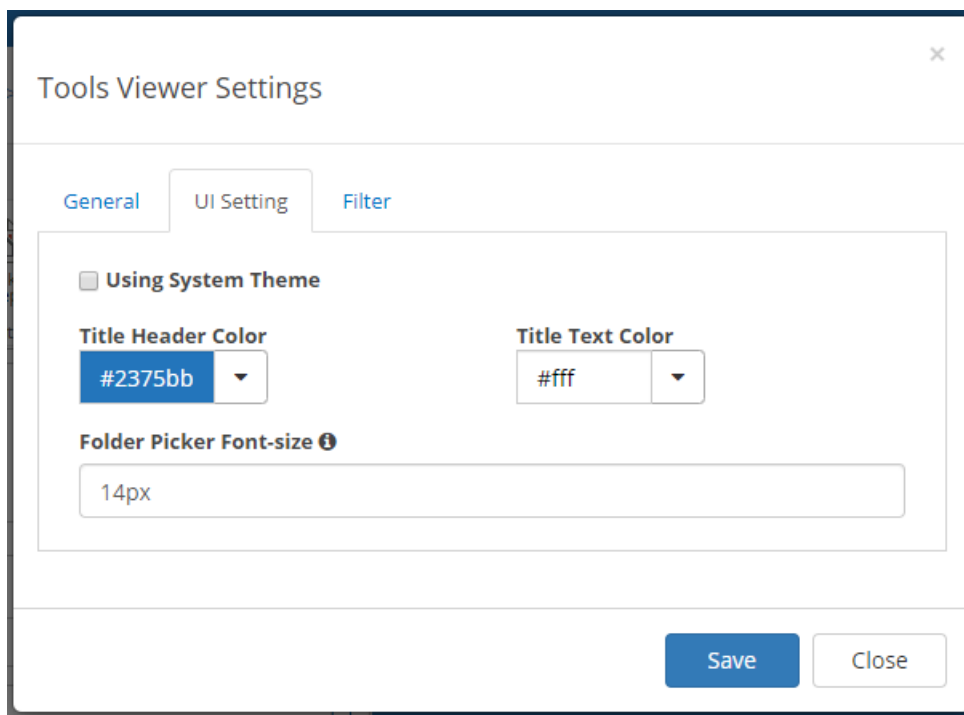


- Show first level sub process is connected to Aggregated view. It allows the user to have to fold/unfold tab, but only displays the name of the first level sub process.

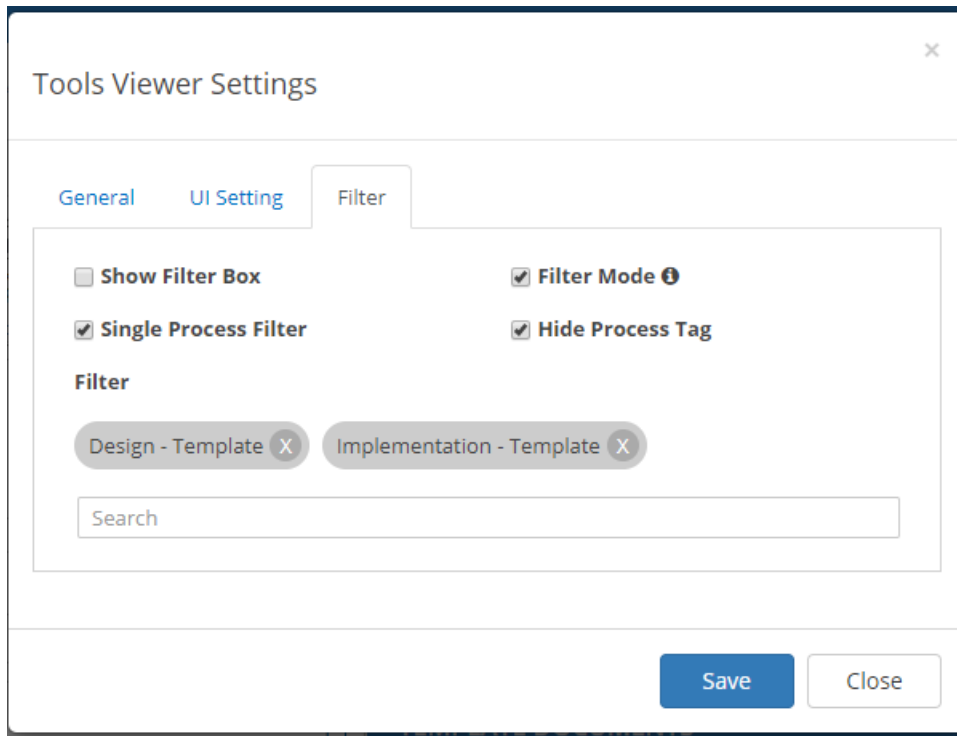
For example if you have a process named Development, and this process has a sub-process that is named Apps that have documents in it. Show first level sub process will only display Development instead of Development - Apps in the tab.

- Show links allows the user to view the links that are connected to the documents of the selected process or sub-process.
- Read documents mode allows the user to view and create documents.
- Disable create disables the ability to create documents in this tools viewer.
- Style Margin CSS Text allows the user to modify the styling of the text display in the tools viewer.

The user has also the ability to change the overall UI of the tools viewer, by modifying the coloring and font-size options provided in the UI Settings tab. The user can also choose to use the system theme UI by using the provided system theme feature:



Tools viewer also provides the option to view and filter documents in many ways:



- Show filter box is an option that displays magnifying glass that when clicked expands to a search bar above the documents. It allows us to search for documents with a specific heading among the displayed documents:
- Filter mode, which only shows tools when they have tags that can be filtered, allows the user to filter documents based on their heading.
- Single Process Filter is the option to select if the filtering should happen on a single process step instead of multiple processes.
- Hide process tag is the option that can be chosen when using single process filter, and it is used to hide the process tag.
- The search bar can be used to look up the processes or headings that can be selected as filters.

Big-Picture

Client Security and Recommendation

Recommend ways to setup Big Picture

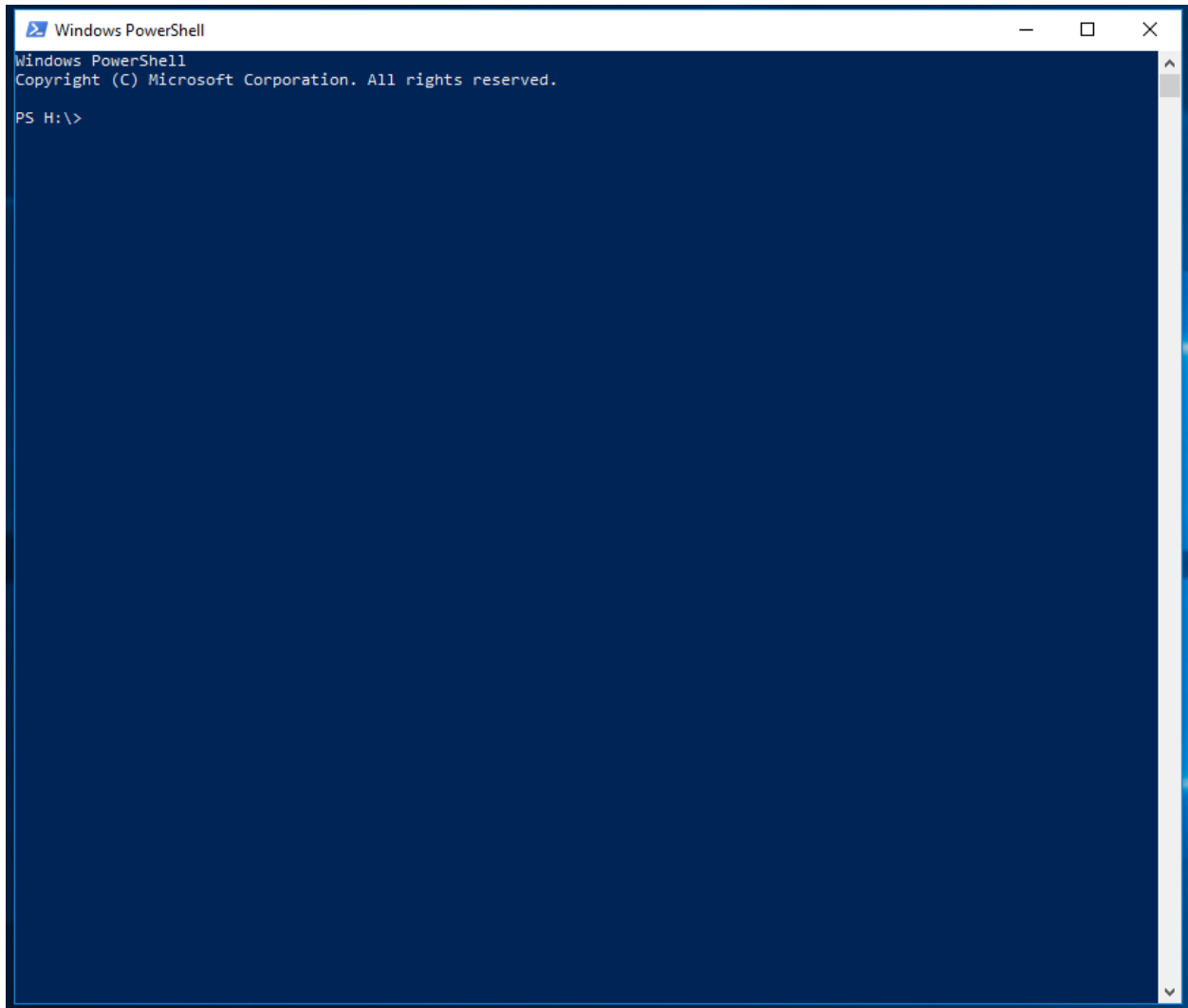
Since Big Picture can be seen as an only-display extension, meaning that it does not require much or any user interaction once its setup, therefore we recommend a few ways to set it up:

Operating system level Kiosk Mode (Recommended)

Kiosk Mode that is also called Assigned Access is a mode that comes with windows, and that allows the user to configure an account that is only allowed to use a specific software without access to anything else like the start menu or the task manager for example, and forces the app to be in fullscreen mode. This way when a person uses the computer that is logged in to the kiosk account, the person can only access the specified app. In this case the app will be Microsoft Edge that will run Big Screen.

In order to setup kiosk mode, we need to be logged in as Administrator, and we need to setup a new user account. This can be simply done by creating a new user in Settings > Accounts > Other people > Add someone else to this PC. Note that the account does not have to be a microsoft account, but can also be just a local account with a password. Make sure to name the account Kiosk.

- Once that is done, open up Windows Powershell which can be found when searched for in the start menu, it looks like this.
- Make sure to right click and run it as Administrator:



- Type in the exact sentence following sentence:

```
Set-AssignedAccess -AppUserModelId Microsoft.MicrosoftEdge_8wekyb3d8bbwe!  
↪MicrosoftEdge -UserName Kiosk
```

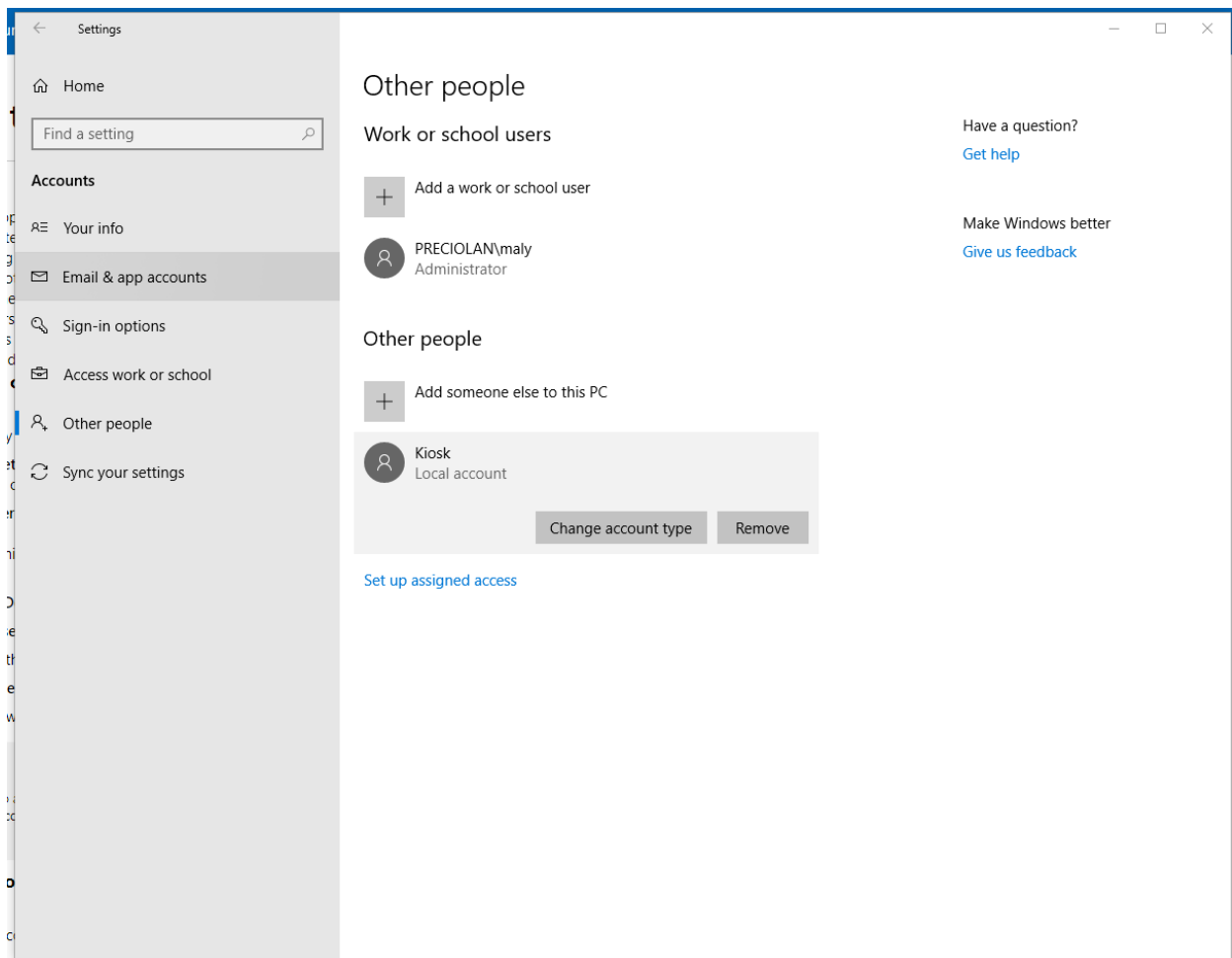
In case of an error, make sure to check the spelling of the sentence above, as the spelling and even the amount of spaces between each word has to be exact.

Now that kiosk mode is up and running, it can be used by logging into the Kiosk user account which will automatically launch Microsoft Edge.

Things to keep in mind

- The browser should have the startpage set to the page of big picture. Using the query string fullscreen=true (For example <https://tenant.sharepoint.com?fullscreen=true#/start/big-picture>) will cause big picture to go into full screen mode automatically. This will enable the computer to be rebooted but still end up on the correct page and put the browser in the correct mode.
- Some TV's might have settings to go into sleep mode or turn off when there is no activity. Make sure to check the TV for such configuration.
- Make sure to change the computers settings for when to go into sleep mode or shutdown after no activity to "never".
- Windows auto-update can cause the devices that are running Big Screen to automatically restart. This should be disabled on the devices that will run Big Picture. The instructions on how to disable it can be found here <https://www.windowscentral.com/how-stop-updates-installing-automatically-windows-10>

Note In order to remove the kiosk account, go to Settings > Accounts > Other people > Click on the Kiosk Account then remove:



Alternative: Browser-level Kiosk Mode (Not Recommended)

Browsers, such as Google Chrome offer a browser level kiosk, in which the browser will be entered into full screen mode and give a similar look to that of Operating System kiosk mode. The main perk with this feature is that it is much easier to setup and get started with than operating system level kiosk mode, but the reason this is not recommended is because the user can exit this mode in multiple ways and gain full access to the device. Therefore it makes it a non secure method to use in public spaces where non-personal can access the device.

Physical Security

Physical security is something to be considered when the companies requires the device to be physically protected. In many cases, the device that is connected to the display, will also be connected and access to the non-public internet. Therefor an intrusion can cause sensitive data leaks or even damage, therefore we recommend that the device itself should be locked in a safe or a locker that is only accessable by staff members, and is connected to the monitor that displays big screen wirelessly. this can be done through chromecast, or if its a smart tv then the computer can connect to it using bluetooth. Make sure to lock the screen after activating Big Screen for an extra secure usage.

Network security

Network security is something to be considered, since the device that is publicly display will be connected to the company network. Therefore we advice to a create an own wifi-network for the the device or devices that will be runnin big picture. This network should have the properties of a guest network, but is password protected so that only the machines that are running big picture can access it. Another alternative is to use a dedicated network, that is completly seperate from the company network for this device. Such options can be purchased at service-providers and often comes in the form of a USB stick or router that will be soly connected to the device running Big Picture.

Additional Security

O365 Security

To Run big picture, a normal user account that can login to O365 and Omnia is needed. This account should have a minimal amount of permissions. For big picture to work the account needs permissions in the following ways:

- Access to the page where the big picture Glue control is placed
- Access to any data it will show (The news center for example)
- Access to the Glue site system page (The welcome page of the Glue site called Omnia.aspx)

Features and Configurations

Big Picture provides the user with a varity of display options that the user can choose from. There is news display which allows the user display news from a specified source on the big screen, image display which allows the user to display an image galary of their choosing, video displayer which allows the user to display a video from youtube or microsoft stream, as well as a page display that can display a page created using omnia sharepoint.

News Display

In order to access the news settings, enter edit mode once again, and this time click on the cog wheel in the full screen component that you placed in your page.

Big Picture allows the user to display news from a provided news center that is connected to the user's intranet. The user can also choose the period of which news will be displaye, how the articles will be ordered, the limit of the amounts of articles at a time and the priority.

Images Display

Images display is found in the second tab and allows the user to link an image folder that has images uploaded to the sharepoint website, and have these images displayed in a specific order and at specific speed.

Video Display

Video display can be found in the third tab that is called Videos Settings where the user can input a URL link to a youtube video or a microsoft stream.

We recommend the use of youtube over microsoft as it reduces the chances of performance issues when this functionality is used on an older device that might have less performance capabilities. In order to display a video setting, make sure to enter a valid youtube url in the video location field. An example of a valid url is: <https://www.youtube.com/watch?v=LhC5PtMWNVo>.

Video settings provides the option to include a video title, a specific start time and end time of the video as well as the ability to add multiple videos.

Page Display

Page display can be found in the fourth tab Pages settings, where the user can select one or multiple webpages to be displayed.

Note that the pages do not have to be created by the user, but the user needs to have access to view them in order to use them for Big Picture.

Display Settings

the display Setting tab is used to configure how Big Picture functions. It is divide up in three parts, general settings, news settings, additional image settings and metadata.

General settings:

- Reload Data (minutes) sets the amount of time between each refresh/reload of the big picture content.
- Note that this does not apply to images and videos that are included in Images Settings and Videos Settings.
- Logo Url provides the ability to provide a url to a logo that you wish to display. Note that the logo does not have to be uploaded to the companys sharepoint, but can be from anywhere (google images for example).
- Logo position gives the ability to select the position of the logo, and logo visibility gives the option to make the logo visible or not.
- logo size decides the size of the logo size.
- Slides indicator color decides the color for the sides indicator, and count down text color decides the color for the count down text.
- Indicator position decides where the indicator will be placed and the indicator visibility decides whether it will be visible or not.

News

- News video template allows the user to select his view and amount of columns they wish to display.
- Shows full article page displays the full article page, and scrolls whole page displays the whole page. Note that

When the user selects Show full article page, scrolls the whole page will also be selected by default, as the display sometimes does not the full article. - Only show summary displays the summary of the news. - Delay time before scroll determines the amount seconds it will be between each page scroll. - Scrolling speed determines the scrolling speed. - Delay time after scroll

Images

The speed of slide animation determines the amount of seconds the image will be displayed before the next one is slided in.

Metadata

The metadata function allows the user to select which metadata they wish to be displayed.

Setup

Prerequisite

In order to setup and configure Big picture, a zip file with the name omniax_bigpicture.zip is required.

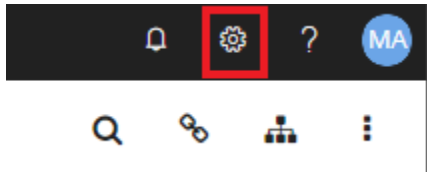
Install and Setup Big Picture

- Register the extensionId. This is done by first registering the extensionId which can be found inside the zip file, under extension.json.
- Go back to System > Extensions, and Upload the omniaX.bigpicture.zip file.
- Once the file has been uploaded, navigate to Features and activate the tenant scoped feature called OmniaX Big Picture Core and activate it.

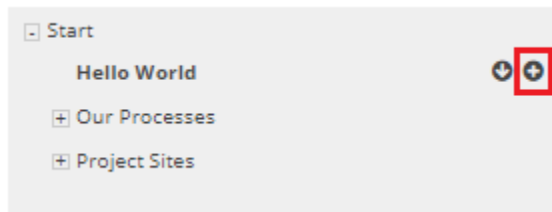
Setup Big Picture

Now that big picture is successfully installed, we will set it up in a page of its own.

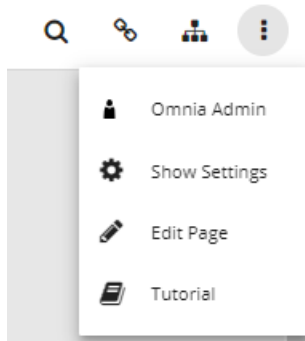
- Go to the start page of the intranet site that you wish to use big picture on.
- Click on the cogwheel in the upper left corner



- Click on Manage Content.
- Click on the plus button of your main page, in this example the start page of the intranet is called hello world:



- Make sure that create page is selected, and write Big Picture in the Title section.
- Click publish.
- Click on the Big Picture site in the menu.
- Click on the three dotted button, then click on edit page button in the upper left corner.



- Click on the headings button (the middle button).
- Scroll down to OmniaX and drag and drop the Fullscreen Viewer component on the top left Web part.
- Click on the cogwheel to configure the web part and then click on save then publish when finished.

The manual for features and configuration functions can be found [here](#).

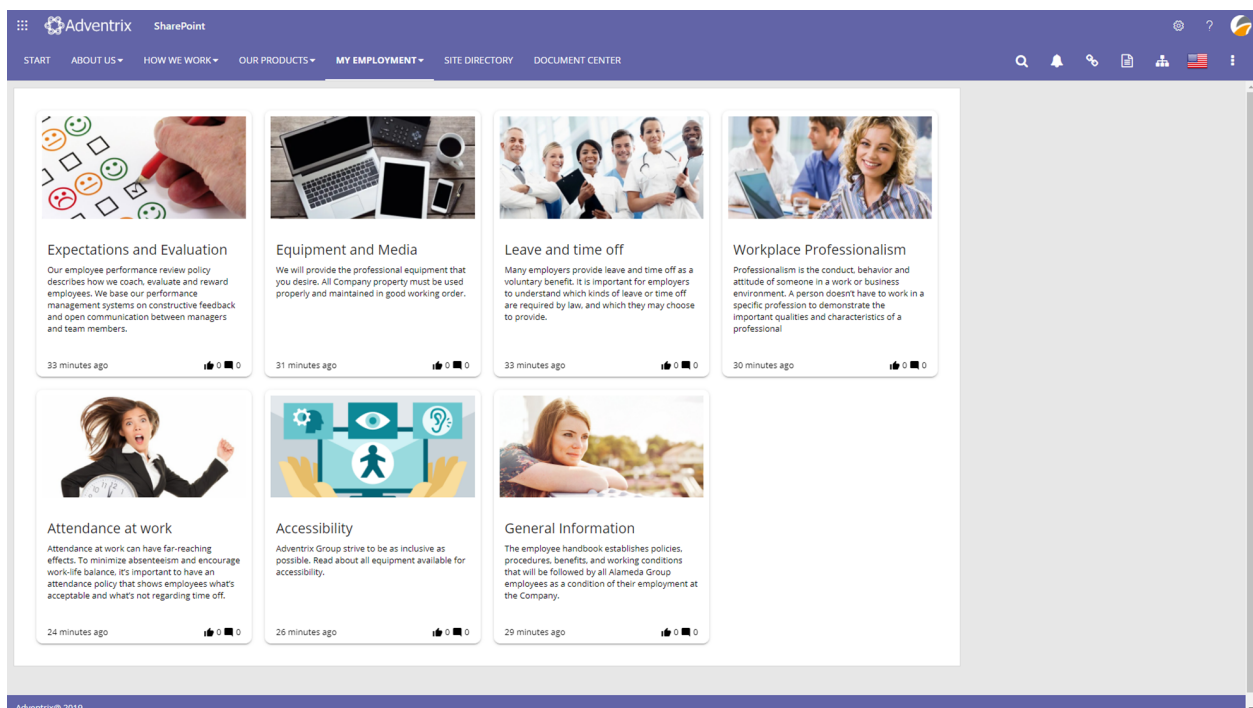
1.10 Release Notes

1.10.1 Release Notes 1.31.0

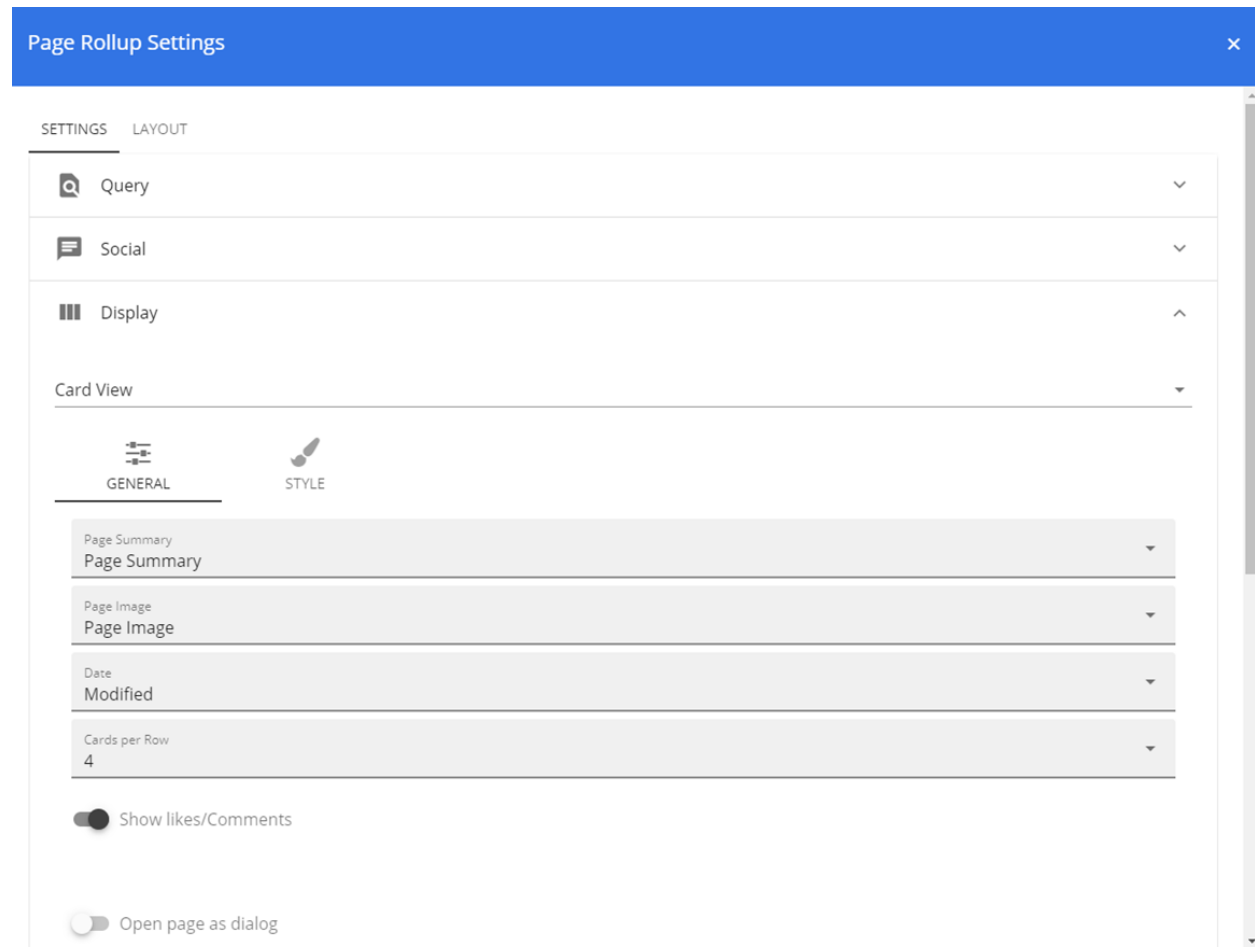
New Features

Page Rollup

It is now possible to rollup a number of pages as a list or as cards using the new Page Rollup block.



There are a number of settings that can be configured to fine-tune the query and design of the rollup.



Fixes

- Fixed issue with checking in pages (#131498, #131624, #131765, #131785, #132080)
- Fixed an issue with performance in QMS (#133467)
- Issue fixed when saving custom messages in Document Types (#128168)
- Fixed an issue with removing Banner images (#133644)
- Issue fixed after publishing Controlled Excel documents (#130002)
- Stabilizations in the layout editor (#133102)
- Load issue fixed in the Aggregated Calendar (#132662)
- Issue fixed with displaying attachments in the Controlled Document Viewer (#132662)
- Issue fixed with browser tab not shows page titles (#134453)
- Fixed an issue with searching for people in the quick search (#134520)
- Issue fixed with table border colors in content management (#134939)
- Fixed an issue with localizations in the Aggregated Calendar (#133804, #133923)

1.31.1

Changes & Fixes

- Separate ISV header for every extension to reduce the risk of throttling
- Enable the use of the Microsoft Graph API for page roll-ups to reduce the risk of throttling
- Enable the use of the Microsoft Graph API for loading quick pages to reduce the risk of throttling
- Cache for targeting introduced to reduce the risk of throttling
- Retry-After respected when SharePoint gets throttled to reduce the risk of throttling
- Issue fixed related to left navigation disappearing in some situations (137007, 136236, 135796, 137261,)
- Issue fixed related to mega menu not showing deep child structures (136528)
- Stabilizations to relating documents in ODM (136090)
- Some translations corrected (136114)
- Bug fixed in related to the “Show more” link in the Important Announcements banner (136328)
- Issue fixed related to statistics (128437)
- Minor style improvements to the mega menu
- Comments on older process versions now visible
- Controlled document review task issue fixed (135812, 134590, 135327)
- Color of related links can now be changed (139480)
- Issue fixed related to some news articles not showing in some situations (139531)
- Stabilizations to the notification panel (135025, 138076)

1.10.2 Release Notes 1.30.0

New Features

- The Footer now has multilingual support (#115318).
- Changed the data storage for QMS to allow for larger processes (#126028, #126056, #124523)
- My Sites now supports a direct link to MS Teams (#119911).

Fixes

- Fixed an issue with the paging of the site directory (#117428).
- Stability fixes to the RSS feed viewer (#117428).
- Fixed an issue when picking images causing faulty URL encode (#109054).
- Image rendition on pages now work correctly (#121662)
- Unique per site property settings now works as expected (#127714).
- Site creation prefix for publishing subsites is now localizable (#122393).
- Existing videos can now be correctly edited in Manage content (#108060).

- Corrected an issue with default colors being configured in the RGB format (#108760).
- Corrected an issue with the preview in a multilingual context (#116649).
- Fixed an issue with duplicated link titles for the related links block. (#121021).
- Fixed an issue preventing adding media to the footer.
- Design updates for several components when using IE11.
- Background color is now applied with the same logic for both CDV and Process Rollup.
- Fixed an issue when chaing back and forth between legacy page and quick page (#106316).
- Updated row break logic for the Document Rollup.
- When pressing enter in a filter on the Site Directory, the page is no longer reloaded (#110832).
- Corrected the query logic for my latest documents (#124223).
- Several stability fixes to how page layouts are loaded (#117912).
- Corrected an issue causing the site URL of last updated documents to sometimes be incorrect (#108976).
- Fixed an issue causing preview not to work after moving a page between subsites.
- Corrected an issue with reordering Refiners and Columns in the CDV and People Rollup. (#124261).
- Updated email validation for feedback email in user profile completeness.
- Fixed a deadlock issue that would occur when publishing a page on a deleted node. (#109742).
- Corrected an issue with translation and preview (#116649).
- Corrected an issue in ODM that would give pdf converted files the wrong file ending. (#114673, #118052)
- Publishing sites are now correctly hidden from My Sites, if configured to do so (#102365).
- Fixed an issue with validation of approver in ODM (#128165).
- Ensured Custom action rendering for manage content (#109514).
- Fixed an issue with notifications when publishing controlled documents in certain situations (#128037)
- Fixed an issue with the Trending pages block, it will now correctly default to current site (#107863).
- Corrected an issue with site approval when the approver name is very long (#108567).
- Fixed a glitch that would cause the rendering height to be incorrect (#121667, #117300).
- Corrected an issue with priority that would sometimes cause duplicates (#108597).
- Corrected issues related to manage content and translation preview (#116649).
- Tutorial tooltip enhancements (#115376).
- Corrected an issue what would occur when changing node segments (#119434).
- Fixed an issue with the process step breadcrumb (#128264, #128548).
- Fixed an issue in the localization UI (#129156).
- Corrected an issue with the filtering of the Manage Content report (#119833).
- Corrected issues regarding statistics (#128437).
- Fixed an issue in regars to document types not being available when creating a new controlled document (#129813).
- Fixed issues with padding on blocks in some situations (#130923).

- Corrected an issue with the people rollup block not loading any content in some cases (#128585, #130746).

Changes

- Updated aggregated calendar to work better with bright accent colors (#113520).
- MS Teams apps can now be enhanced with the query parameters “tenantheader”, “omniaheader” to hide headers when creating an app. (#109700).
- Updated padding for some news viewer views, they now look better in the notification panel (#108563).
- Link to news center now supports being right clicked and opened in a new tab (#107794).
- The omnia master page will now indicate correct language allowing built in browser features to do correct translations.
- Added a feature to exclude files by filetype in the “My Recent Documents” (#102800, #114550)
- It's now possible to search by document id when searching for related documents (#120300).
- Added Start and End dates to the Aggregated Calendar detail's view.
- Better reactivity in the glue editor, no page reloads should now be needed to see new settings.
- Titles are now more consistent in its word-break behavior.
- There is now a clear button for the current search in the People Rollup.
- Updated validation for site provisioning to avoid collisions with distribution lists (#108471).
- Ensured upgrades of ODM Features will work better in the future (#123319, #117128).
- Added a color setting for the notification bubble of the notification panel in the header (#121289).
- The Aggregated Calendar design has been improved to better handle for example multiple calendars (#117818, #118759, #108871).
- Several stability changes to localization (#120437).
- Updated the permission checking of showing the site quick edit control (#114472).
- The Controlled Document Viewer now correctly word-wrap on space. (#101541, #107194).
- Targeting mappings are now sorted alphabetically (#107658).
- Several stability fixes to the glue page editor (#111295, #110827).
- Responsiveness of the mega menu has been improved (#107814).
- Improved design of the Mobile Refiners in the Document Rollup (#122425).
- “Cascade to left” in the glue editor has been removed (#112301).
- It's now possible to click on the notification indicator (#102926).

For Developers

- Corrected the Field provisioning for Lookup Fields.
- HTTP DELETE is now supported in the MSGraph API.

1.30.1

Changes & Fixes

- Fixed issue when Omnia is used as an app in Teams (#132227)
- Translation corrections (#131674)
- Corrected an issue with sites not showing up in the “My Sites”-block in some cases (#129892).
- Banner fixes (#131871, #132013)
- Stabilisations to Big Picture (#129433)
- Fixed an issue with the statistics provider (#131137).
- Review reminders in Document Management corrected (#132289)
- Fixed an issue with saving properties on pages and banners (#131756, #131797, #131896, #131892).
- Navigation sort order corrected (#131274)
- Corrected the sort order for people rollups (#131208).
- Fixed an issue with users having different UPN and email (#130779, #130358).

1.10.3 Release Notes 1.29.0

New Features

Follow published Controlled Documents

(#115730)

It is now possible to follow a specific published controlled document. Click the Follow/Unfollow button in the information panel of a document to start or stop following the document.

Specified Date

31-10-2019

Specific Retention Date

31-10-2019





Yes No

No

FOLLOW

UNPUBLISH

The followed documents are displayed in the new Followed Controlled Documents block. Add the block to the notification panel to get notified on updates. You can show the documents in two views. List view or Grouped by TimeSpan.

Followed Controlled Documents		
	05112019 Doc 2 ODM Authoring Site 2	10 months ago ★
	01112019 TCT1 - Doc 1 ODM Authoring Site 2	10 months ago ★
	2017-Scrum-Guide-US.pdf ODM Authoring Site 1	10 months ago ★
	Test_Placeholder_2.docx ODM Authoring Site 1	10 months ago ★

Create Document Wizard Improvements

We have done some changes to the Document Create Wizard to make it more user friendly. The template selection & properties area has switched places. The File Name property is now hidden by default but can easily be accessed via the show more link.

Create New Document

☒ Controlled Document

SELECT TYPE

English

Allow Revision

Blank Word Template

PROPERTIES

Title *

Show more

Document Owner

Department

Development

Specified Date

20-05-2020

Specific Retention Date

Yes No

Yes

Document Level

2

Integer field

3

Location

Product Id1

SELECT A LOCATION

SUGGESTED

FOLLOWED

ALL

QD QESH Department

TM ODM Authoring Site 1

TM ODM Auhtoring Site 2

CREATE

CANCEL

The document type and Template now has a Suggested and All Tab. We added a search function when using the All tab to make it easier to find your document types and templates.

SELECT TYPE

English




SUGGESTED

ALL

Work

Work Instruction

You can now configure if a property should show up in the Document Wizard. Set the wanted behaviour in the document profile. You can set it to “Visible”, “Hidden in new form” or “Hidden”.

Property	Source	Inherit Status	Required (on publishing)	Visibility	Default Value
Document Owner	Controlled Document		<input type="checkbox"/>	<div>Visible</div> <div>Visible</div> <div>Hidden in new form</div> <div>Hidden</div>	<input type="radio"/> Fixed Value <input checked="" type="radio"/> From Site Property <input type="text" value="Site Owner"/>
Product Family	Controlled Document		<input type="checkbox"/>	Visible	Fixed Value: <i>Mountain Bikes</i>
Product	Controlled Document		<input type="checkbox"/>	Visible	

Enhancements

- Added support for wildcard search for people rollup block search. (#108483)
- Loading experience for Site Directory (#104748)
- Added support for browsers that are not able to handle | char in URL. (#117996, #118492, #118550)
- Page Feedback publishing site specific settings is now supported.
- News Viewer localization Support when viewed in Microsoft Teams Custom App.

Omnia Document Management

- Document Templates are now sorted alphabetical in create document wizard. (#114273)
- Taxonomy Picker now show the path of the term when hovered. (#113897)
- Added icon for XSLM in document viewer. (#120935)
- Show or hide properties in the creation wizard.
- New view in the Controlled Document Block to show drafts for the current user.
- Page Feedback email to SharePoint group support.

Quality Management System

- Added rectangle shape to default shapes.

Fixes

- Rendering issues with various block titles. (#112760, #113609, 106735)
- Related links rendering of icon when using long titles. (#111488)
- Issue with rendering current navigation for some tenants. (#110826)
- Upload file dialog being too small for some browsers. (#102746)
- Issue with icon for takes not rendering correct when using long titles. (#109096)
- IE11 various fixes. (#107214, #109987, #102306, #103704)
- Rendering issues in create size dialog for some tenants. (#106549, #107643)
- Group Selection issues for People Rollup. (#101118)
- Language Picker taking up space even if no translation is created. (#106509)
- Navigation issues for some tenants when ending URL with “/” char. (#102921)
- Title issues for News Viewer being cut even when there is space available. (#106503)
- Page content not being loaded when navigating between publishing sites for some tenants. (#118518)

- News Viewer, View: Image on left having some responsive issues. (#118759)
- News Viewer rendering issues on some iPhone Modes. (#105904)
- Showing events in Aggregated Calendar when start & end date is the same time. (#107802)
- Publishing sub site showing up in My Sites. (#118299)
- Issue showing some images in the Image Picker. (#107408)
- News Viewer no result text margins. (#105164)
- Issues showing title and summary in legacy pages. (#103227)
- Action link margin issues for Aggregated Calendar block. (#106914)
- News Viewer - New item icon not being aligned. (#109161)
- Issues with My Links panel double scrollbars.
- Issue for pages faulty showing “The page you’re looking for doesn’t exist” in some tenants.
- My Site & My Links panels closing unexpectedly.
- Colour and style rendering issues for banners.
- Field alignment in User Feed Block.
- Wrong URL send when notified for added page feedback.
- Global menu rendering issues. content overlapping for some clients.
- Rendering issues for Media Picker filters.
- Problems accessing Manage Content on some clients.
- Dialog issues for sharing from User Feed Block.
- Aggregated Calendar, button alignment.
- English labels for Page Feedback updated.
- Problems loading Page Feedback Panel on some clients.
- Issues rendering Page Feedback Button for some clients.
- My Links, updated icon for follow and unfollow not being the same for some clients.
- Issues with error handling for some components when logged in as external users. (#107453, #118047, #118691)
- Issue with media picker showing image on edit in some use cases.
- Aggregated calendar not showing all events in month view.
- User Feed block title not rendering on some clients.
- Banner content color not applied correctly.
- SPFx pre allocated height not working in some environments.
- Background issues in dialog for document rollup dialog.
- Task rollup sometimes shows task that were already completed.

Omnia Document Management

- Create wizard dialog showing double scrolls in some browsers. (#115327)
- Rendering issues in document creation wizards for large number of document types.
- Labels for delete draft buttons change to be more consistant.

- Issue with paging sometimes not working for some clients.

1.29.1

Changes & Fixes

- Targeting issue for specific tenant. (#123462)
- Special character added to some list items causing issues in quick search. (#123829, #123829)
- Mailto links not supported in related links on on-premise tenant. (#124150)
- Omnia installation issues on SharePoint 2016 (#124201)
- Manage Content - Edit content area rendering issues. (#124114)
- Issue with Encoding of Swedish characters in Controlled Document attachments. (#123884)
- Page layout not found issues for some tenants. (#113864)
- Quick Search button issues when clicked multiple times. (#123317)
- Label update for Swedish shapes in OPM. (#123585)
- Issues with following sites for some tenants. (#121144, #123934)
- Issue with replacing tokens in xlxs documents for controlled documents. (#123452)
- Issues with properties appearing blank when working on controlled document drafts. (#123898, #123706)
- Breadcrumb not showing on some pages. (#123845)
- Document type naming issue for some clients after upgrade. (#124328)
- Issues with page feedback on some tenants. (#123781)

1.29.2

Changes & Fixes

- Issues with large QMS processes not being able to update correctly for some customers. (#126028, #126056)
- Minor improvements for QMS. (#125434, #124938)
- Loading spinner issues for News viewer block for some customers. (#125413)
- Issues loading some information on pages when the user has not set any MS365 locale information. (#125251)
- Rendering Issues when user does not follow any sites. (#124792)
- Sorting of global menu navigation nodes when auto arrange is enabled. (#125408)
- Issues with footer content when turning off legacy support. (#124065)
- Some users redirected to blank page when creating new document. (#124747)
- Built In Icon issues when adding a new announcement. (#126020)

1.29.3

Changes & Fixes

- Header sizes on the related links for pages aligned (#122111, #127350)
- My Tasks and Last Updated Documents blocks fail to retrieve data in some situations (#127023)
- Mega menu alignment issues when the auto arrange setting for nodes is turned off (#127176)
- Tooltips on navigation nodes fail to load in some situations (#126834)
- Issues with hyperlinks in QMS emails (#126181)
- Page feedback report shows no data (#126019)
- Issues with Swedish characters when saving QMS process descriptions (#126182, #126247)
- Issues with the two-step rendering in page rollups (#125413)

1.29.4

Changes & Fixes

- DocumentRollup and AggregatedCalendar blocks fail to load data in some situations (#127779)
- URL parameters change to lowercase (#128239)

1.10.4 Release Notes 1.28.0

New Features

Important Announcements Rich Text Support

It is now possible to add Rich Text content to an Important Announcements.

Add Important Announcement [Close]

Title

Lorem ipsum dolor sit amet

Summary

consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua

Image

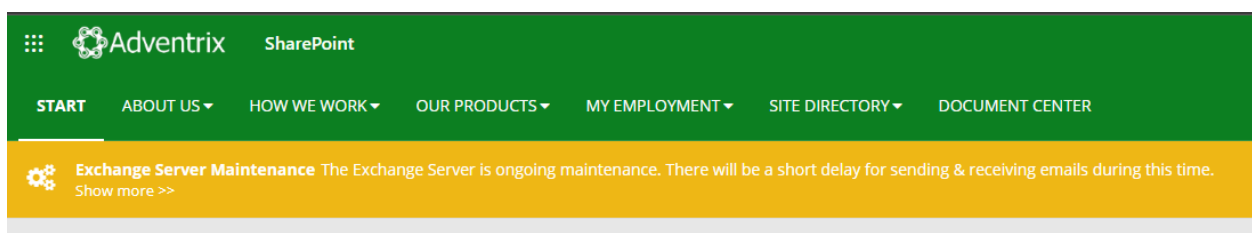
https://omniapreprod.sharepoint.com/sites/adventrix-group/global-ima [Browse]

Detail

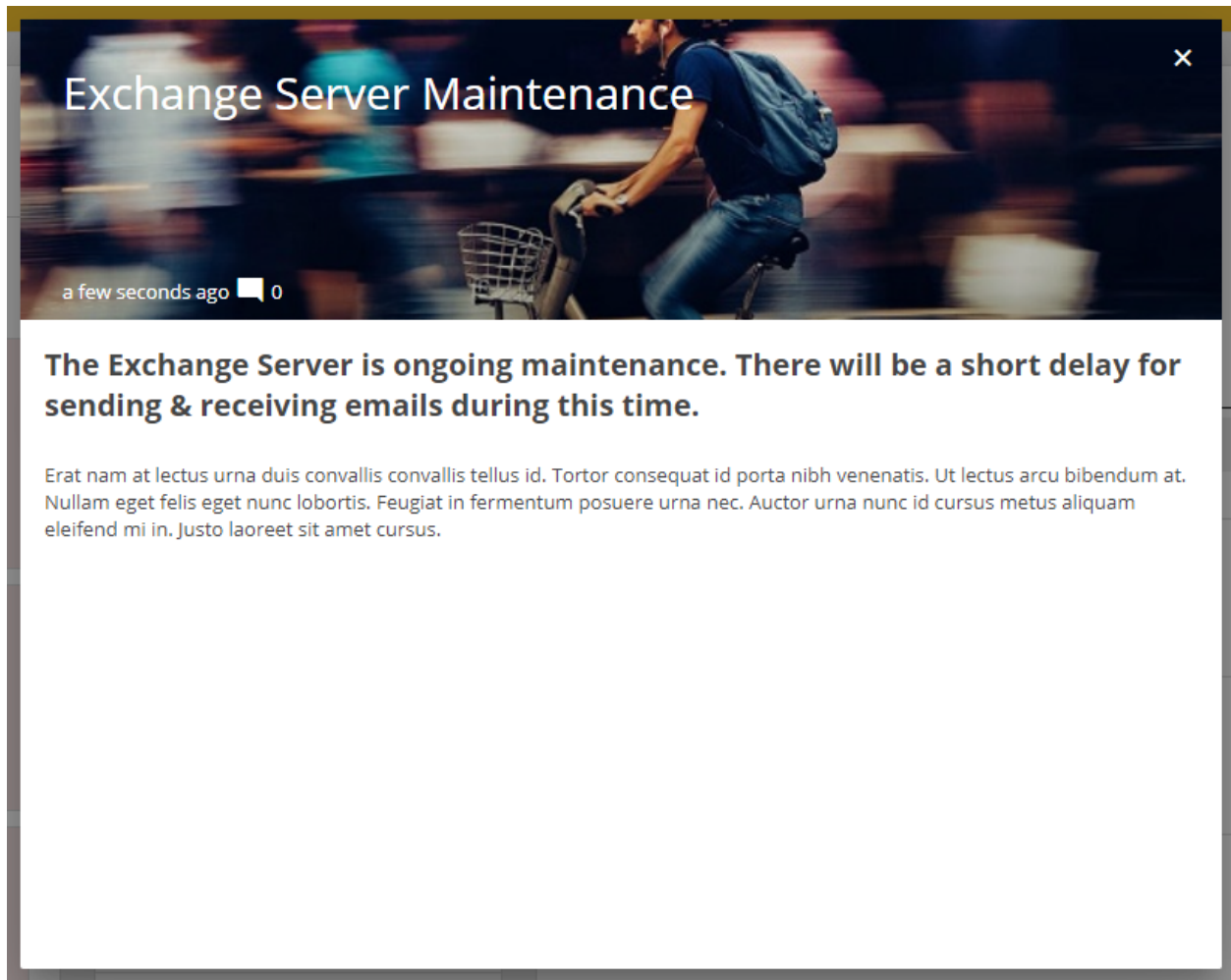
B *I* U “ ” Paragraph [List] [Link] [Unlink] [Insert] [Table] [Code]

Erat nam at lectus urna dui convallis convallis tellus id. Tortor consequat id porta nibh venenatis. Ut lectus arcu bibendum at. Nullam eget felis eget nunc lobortis. Feugiat in fermentum posuere urna nec. Auctor urna nunc id cursus metus aliquam eleifend mi in. Justo laoreet sit amet cursus.

When Rich Text is added to an Important Announcement a “Show more >>” link is displayed in the notification message in the header.

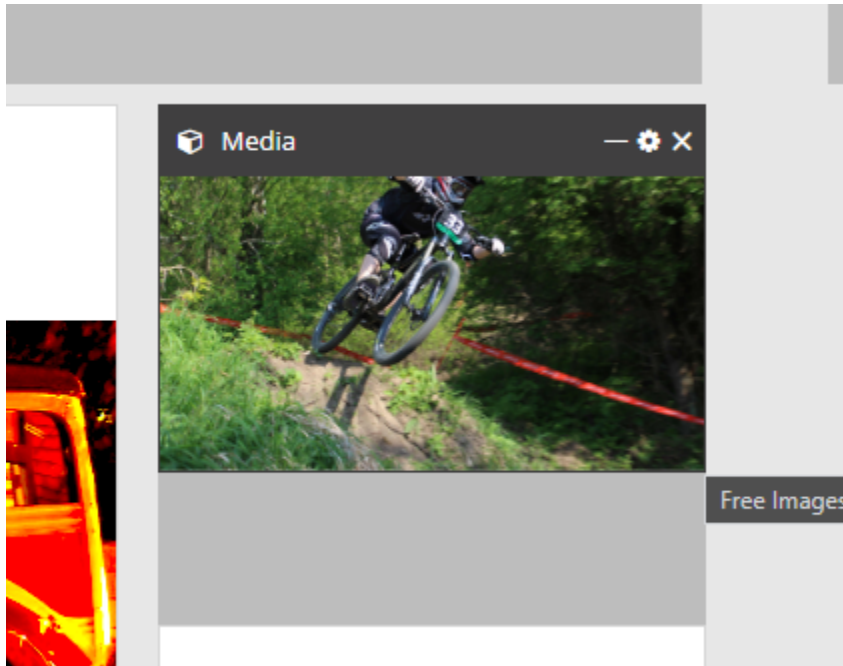


Users can click on the link to open the announcement in a dialog window for more information.



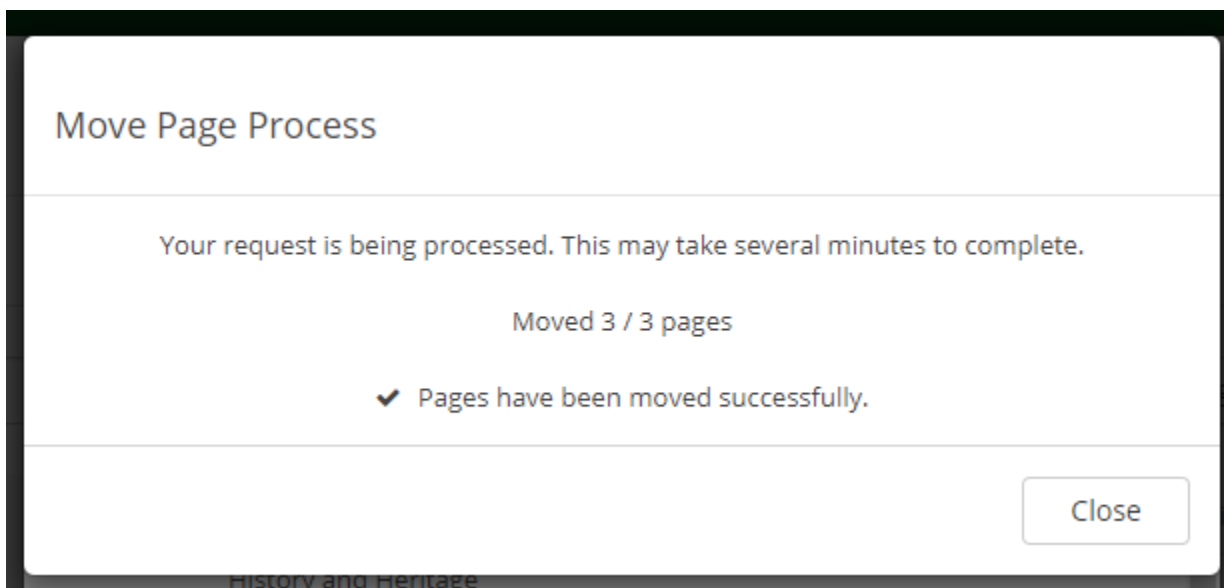
Media Block

A new block has been added that makes it easy to show images and videos. Add the Media block to the page/layout and select the media you would like to display to the end user.



Improved Managed Content

It is now possible to move a page with children to another location in the structure. Simply choose to move and follow the steps to move a page and its children. If the target location is connected to a specific publishing site, you will get prompted to choose if you want to move the physical pages of the selected page and its children to the new publishing site or just move the navigation nodes.



Improved Mega Menu

(#107044)

It is now possible to set the sorting of columns in the mega menu to use the same sorting as shown in Managed Content. Simply turn off the “Enable auto arrange columns” to enable custom sorting.

Cross Site Mega Menu ×

GENERAL

CUSTOM COLORS

Static Display Levels

2

Dynamic Display Levels

2

☐ Enable Auto Arranged Collumns

Enable to automatically set the number of columns and sort order to best fit the available width & height of the global menu.

Maximum number of column

3

Mega menu maximum height

600

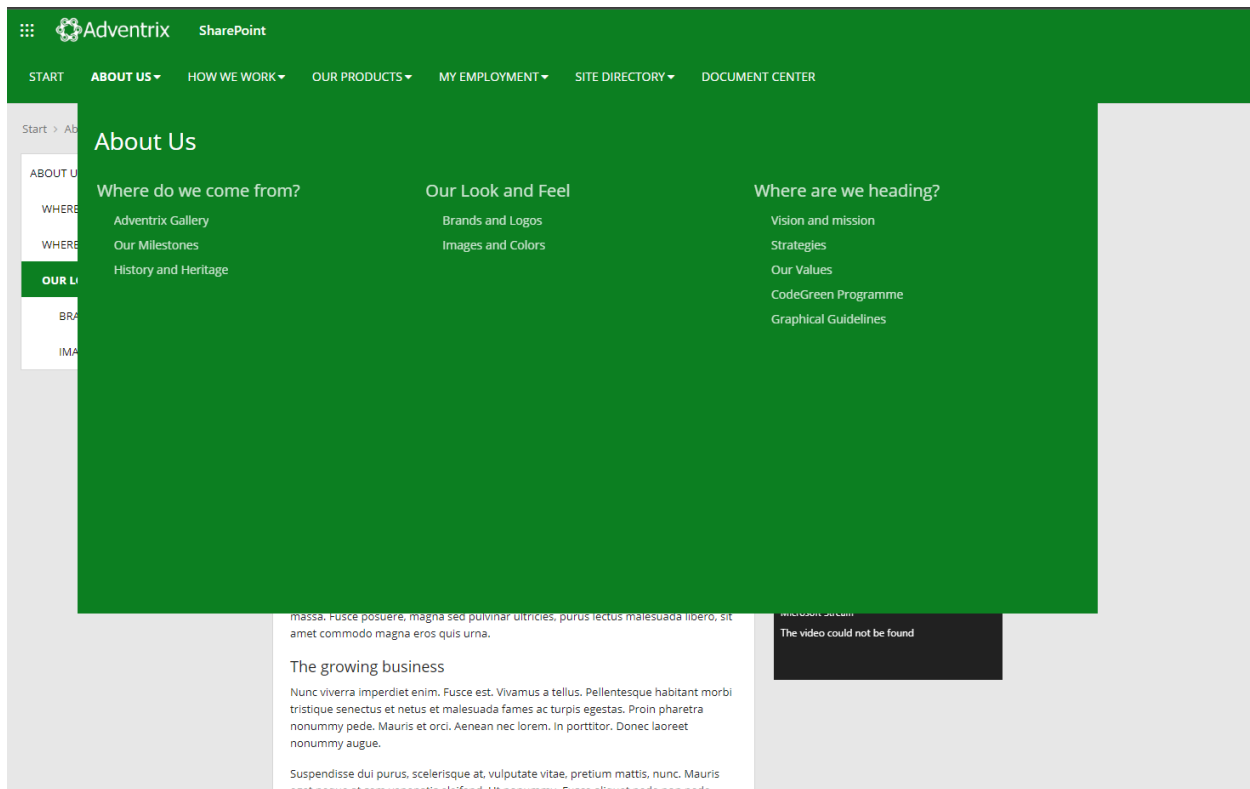
Mega menu maximum width

1200

☒ Show mobile parent siblings

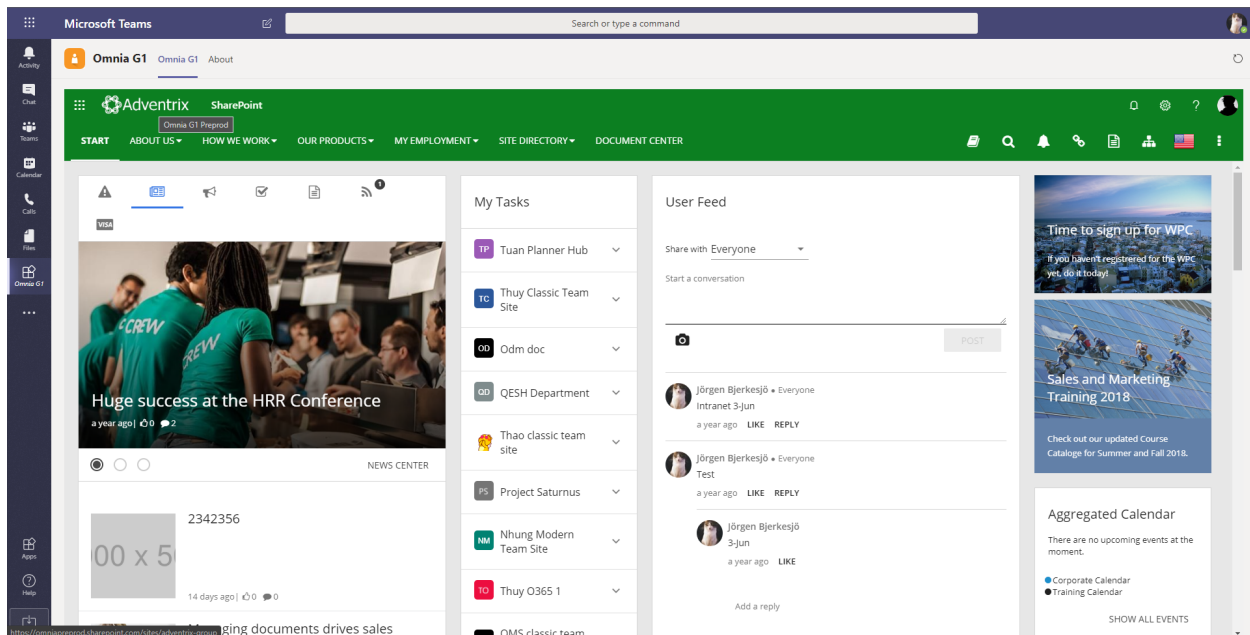
☐ Allow external users

You can also decide the number of columns that you would like to display per row and also set a specific height & width for the global navigation flyout area.



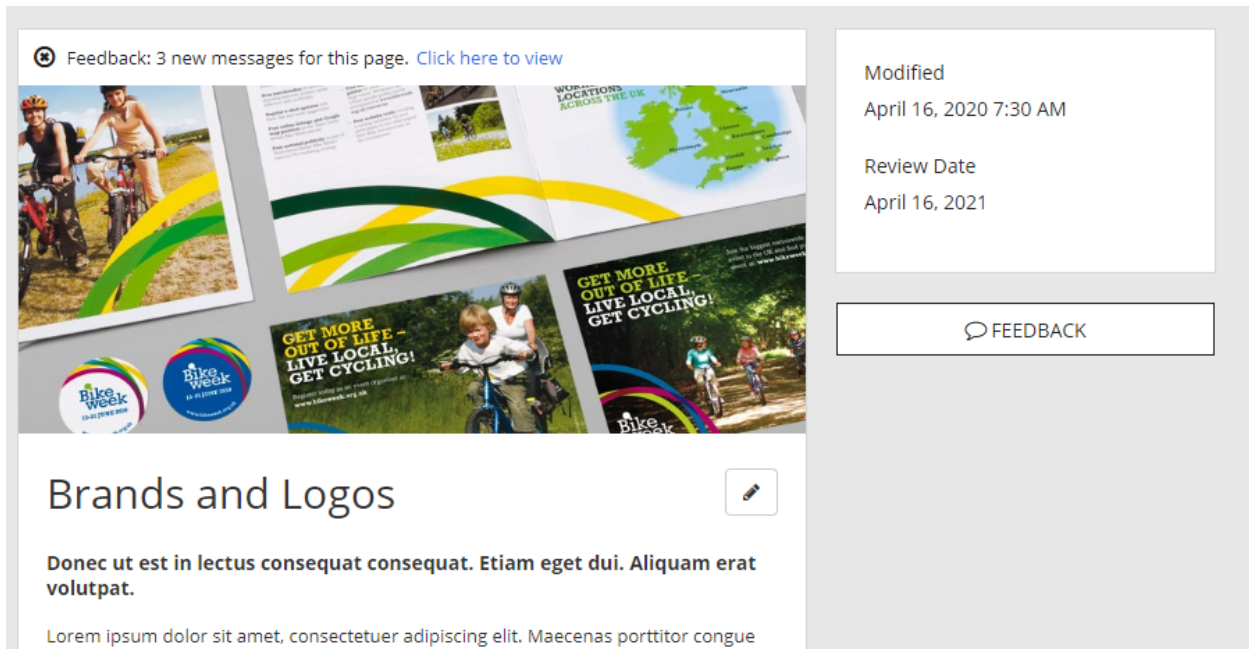
Omnia Portal in Microsoft Teams

Omnia can now be displayed in Microsoft Teams to enhance your digital workplace experience.

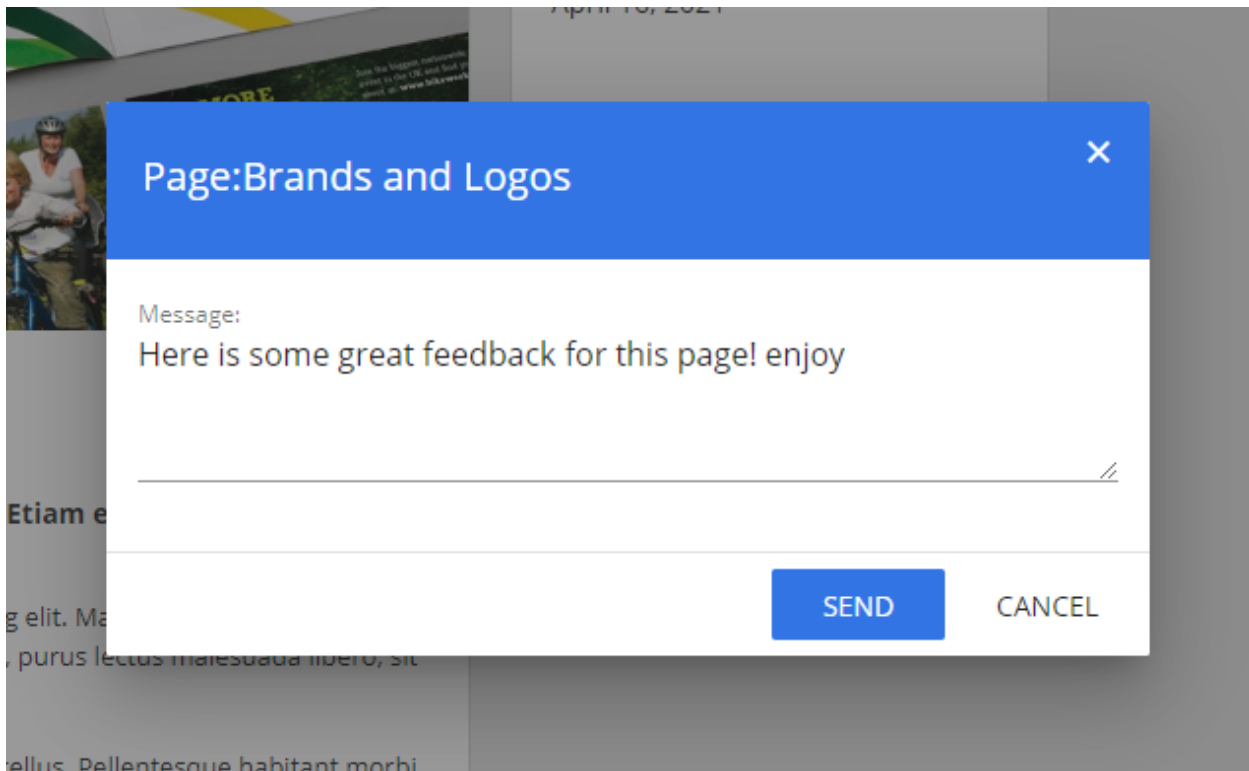


Page Feedback

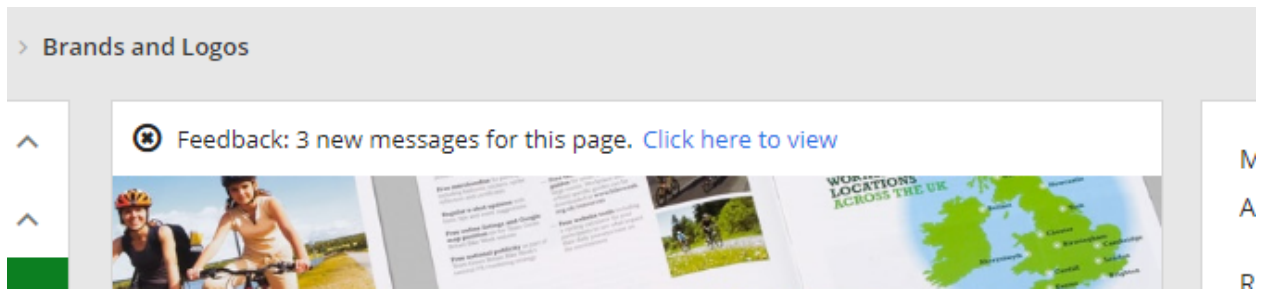
Omnia now supports page feed functionality do make it easier for end users to report needed changes e.g. the page contact.



Page feedback dialog window



A message is displayed on the page for the page editors when new feedback is available.



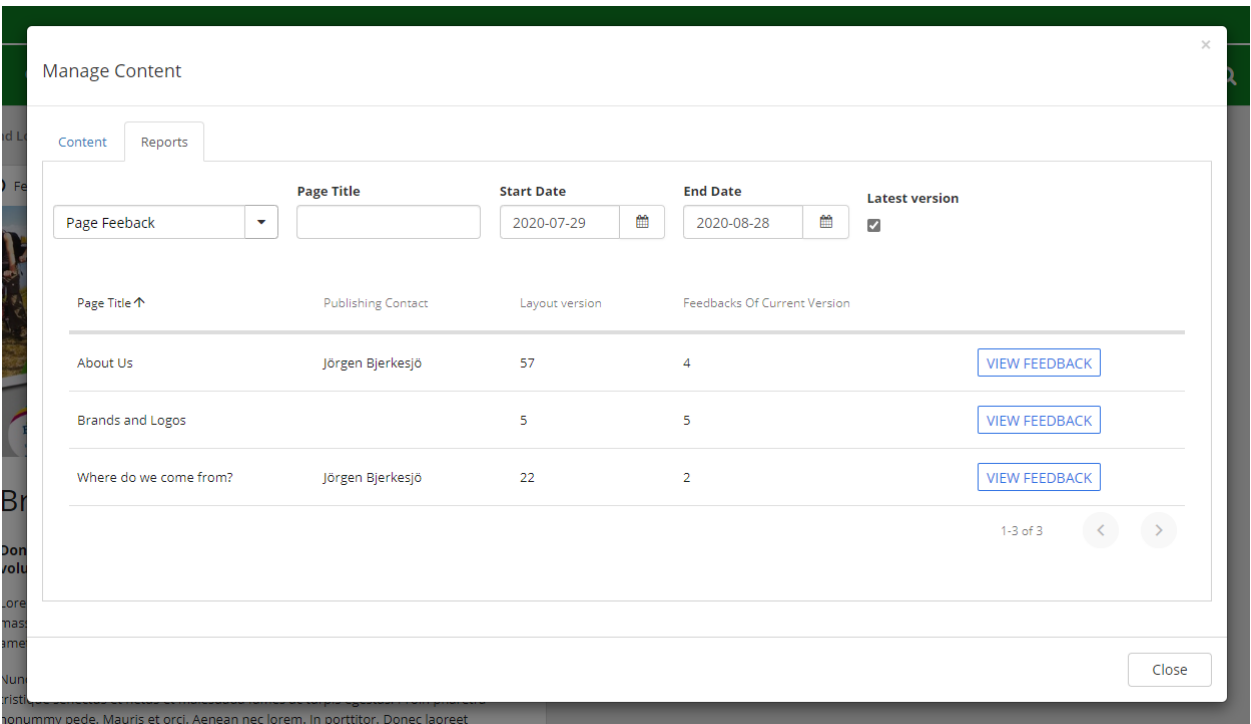
View all Page Feedback added to a specific page using the page feedback panel.

Page Feedback

×

<div>Jörgen Bjerkesjö</div> <div>Version: 5</div> <div>2020-08-28 11:36:50</div> <div>Here you have some feedback!</div>	<div>^</div> <div>🗑️</div>
<div>Jörgen Bjerkesjö</div> <div>Version: 5</div> <div>2020-08-11 09:23:06</div>	<div>▼</div> <div>🗑️</div>
<div>Jörgen Bjerkesjö</div> <div>Version: 5</div> <div>2020-08-11 09:18:56</div>	<div>▼</div> <div>🗑️</div>
<div>Jörgen Bjerkesjö</div> <div>Version: 5</div> <div>2020-08-11 09:17:04</div>	<div>▼</div> <div>🗑️</div>
<div>Jörgen Bjerkesjö</div> <div>Version: 5</div> <div>2020-08-11 09:14:41</div>	<div>▼</div> <div>🗑️</div>

There is also an Page Feedback report available in the Manage Content Reports area.

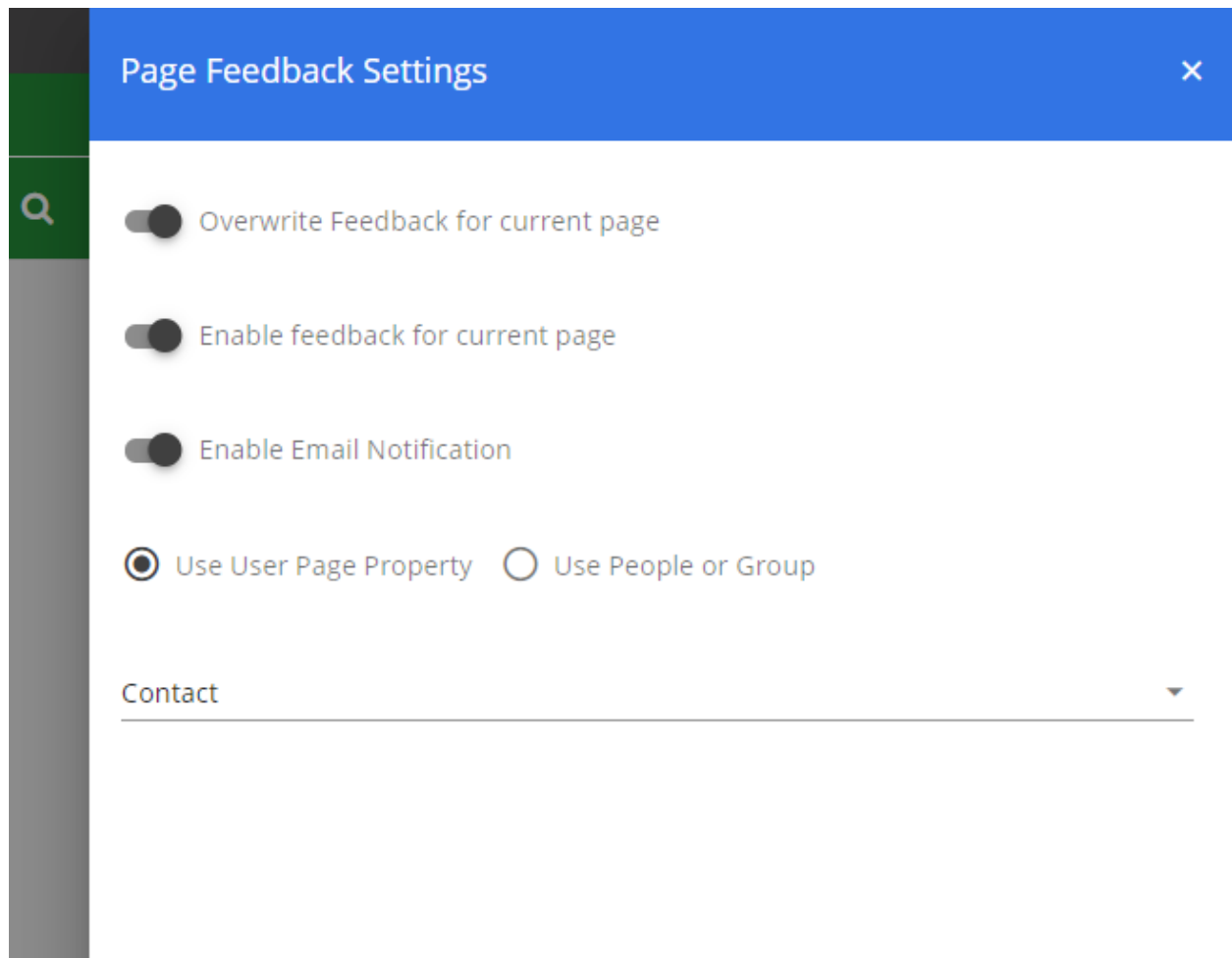


Settings can be set for a publishing site

The screenshot displays the 'Feedback' settings page within the Omnia Intranet. The left sidebar contains a navigation menu with options like Home, System, Features, Tenant, Targeting Definitions, Site Templates, Navigation, Common Links, Important Announcements, Document Management, Page Footer, QMS, Omnia Profiles, User Profiles, Extranet Admin, Tutorial Management, Site Collection, Quick Polls, Reusable Banners, Layouts, Process Management, Content Management, Statistics Provider, Aggregated Calendar, Site, and Image Picker. The main content area is titled 'Feedback: Intranet' and includes the following settings:

- Enable Feedback for current site:** ☒ Enabled
- Enable Email Notification:** ☒ Enabled
- Feedback Notification Message Settings:**
 - Page Property:** Contact
 - Users or Groups:** (Empty text input field)
- Notification/Buttons background:** #ffffff
- Border:** #ffffff
- Text color:** #212121
- Link:** #3274e4
- Icon:** fa-times-circle-o (with a 'Browse' button)
- Feedback Button Group Settings:**
 - Button Background Color:** #ffffff
 - Button Text Color:** #212121
 - Button Icon Color:** #212121
 - Button Border Color:** #212121
 - Button Icon:** fa-comment-o (with a 'Browse' button)

or on block level.



The screenshot shows a 'Page Feedback Settings' dialog box with a blue header bar containing a close button (X). On the left is a vertical sidebar with a magnifying glass icon. The main area contains three toggle switches, all currently turned off, and two radio button options. Below these is a 'Contact' field with a dropdown arrow.

Page Feedback Settings X

☐ Overwrite Feedback for current page

☐ Enable feedback for current page

☐ Enable Email Notification

☒ Use User Page Property ☐ Use People or Group

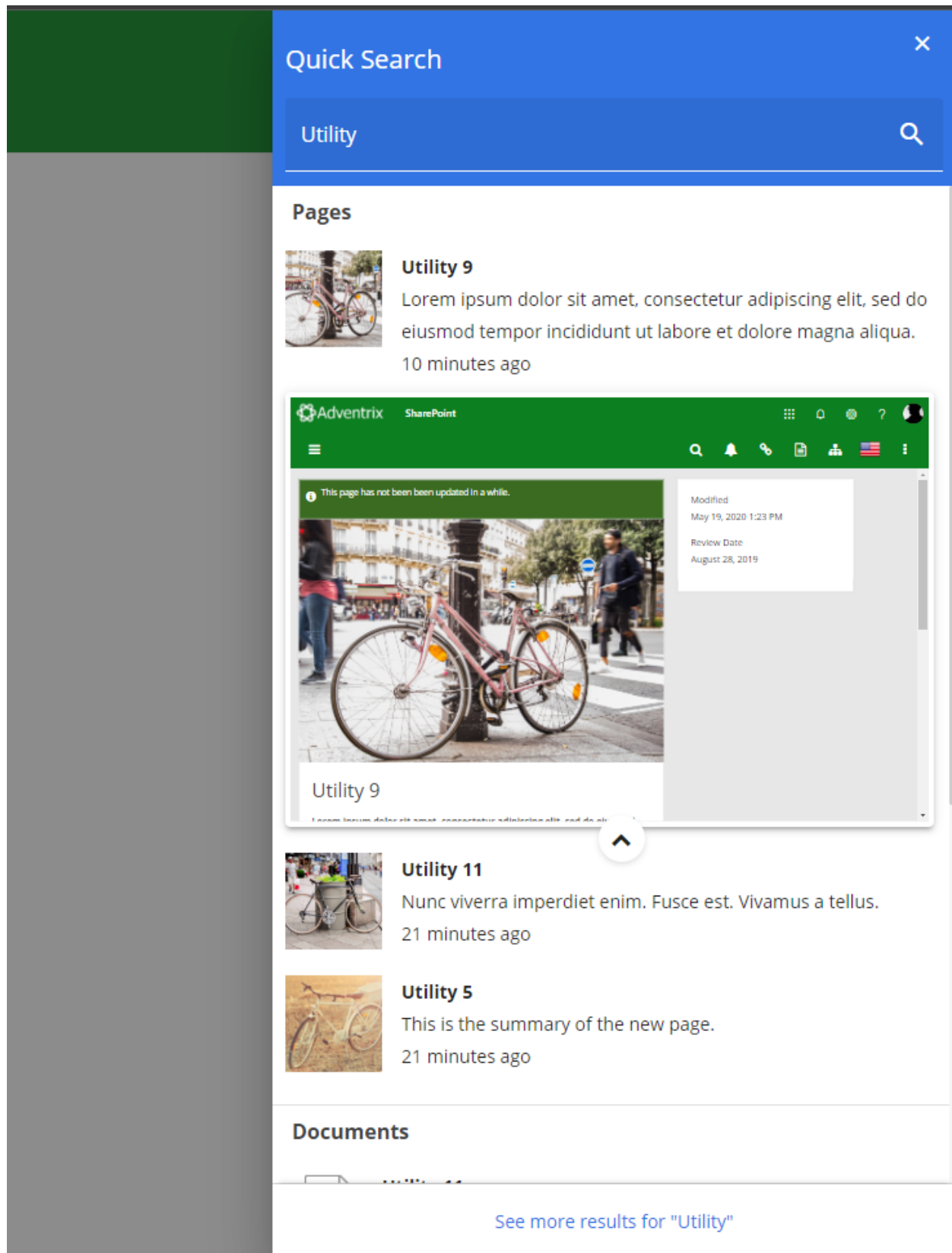
Contact ▼

Improved Search Experience

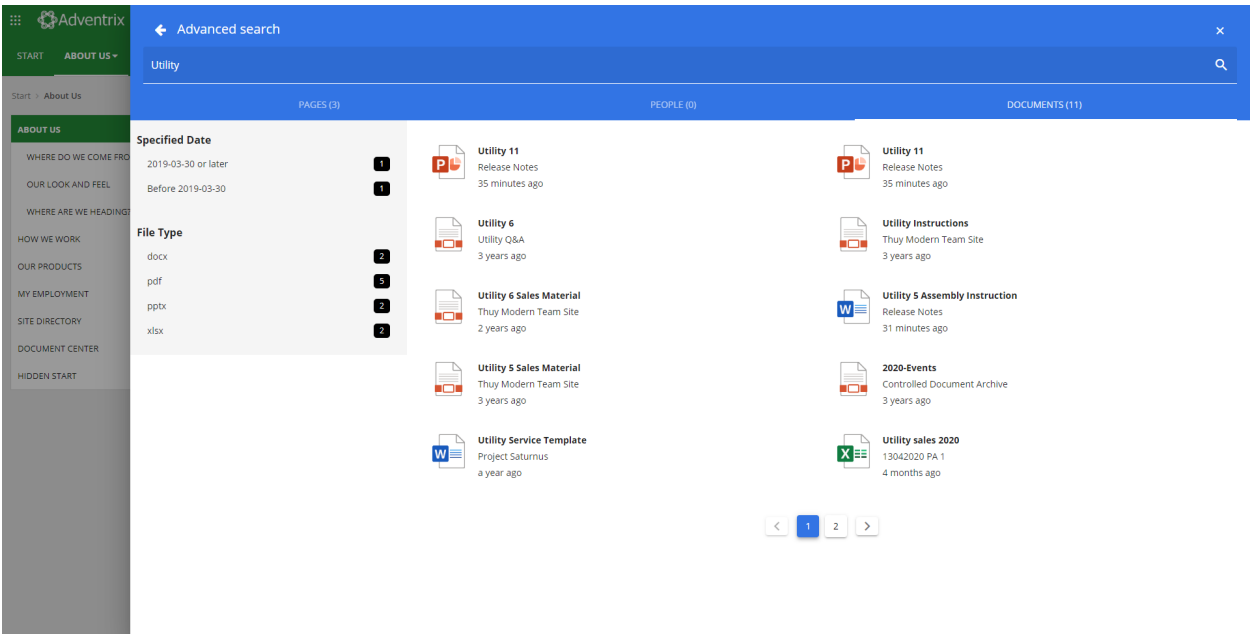
(#109309, #107344, #108063)

A new way of showing search results has been introduced. This new mode is more flexible and provides a better search experience for end user.

You can now preview pages & documents directly in the search result before opening them. Configure what to display in the quick and advanced search area.

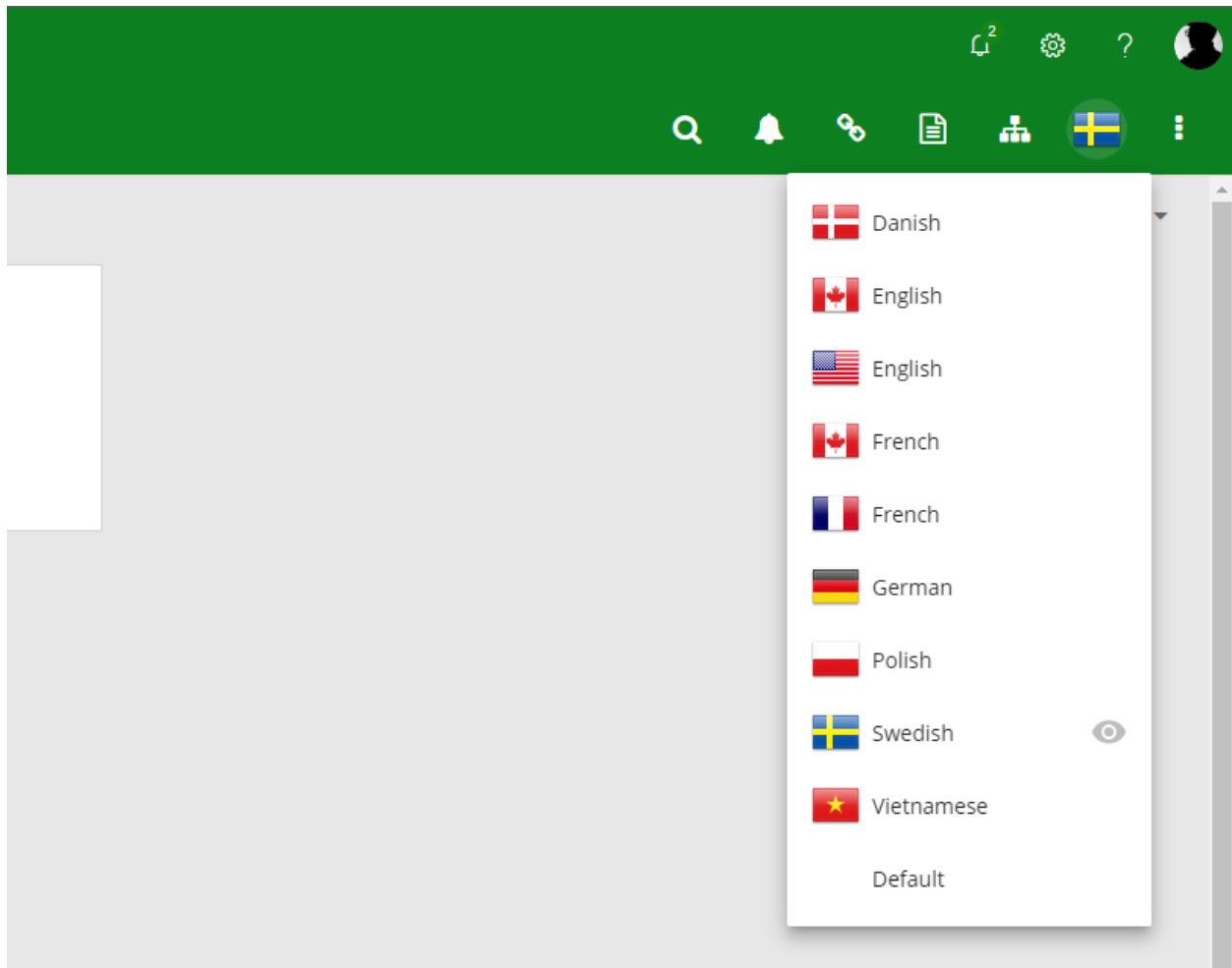


The new advanced search flyout offers a more detailed search experience with support for refiners without having the user leave their current context.



Change portal display Language

Its now possible to see the page content, current and mega menu in other available languages. Users can choose which language to render the portal content in via the Omnia Header.



Improved Page Review Workflow

We have improved page review workflow to make it more flexible. You can now have a specific page review settings for each available publishing site.

Intranet

Jörgen Bjerkessjö

Content Management » Review

Review: Intranet

Review Responsible
Contact

Review Date
Modified
6
Month(s)

Notification Text Color
#FFFFFF

Notification Link Color
#337ab7

Notification Background Color
#a1a95e

Notification Icon
Bu
fa-info-circle
Browse

Enable Quick Review
☒ Enabled


In Advance Email Review Reminder
☒ Enabled
1
day(s) before review date

Review Reminder Report Interval
☒ Enabled
2
Day(s)

Save

A message is displayed on the page that the review date is surpassed. An author can quickly set a new review date for a page directly from the page.

i This page has not been updated in a while, please check that the content is valid and press here to get a new review date.

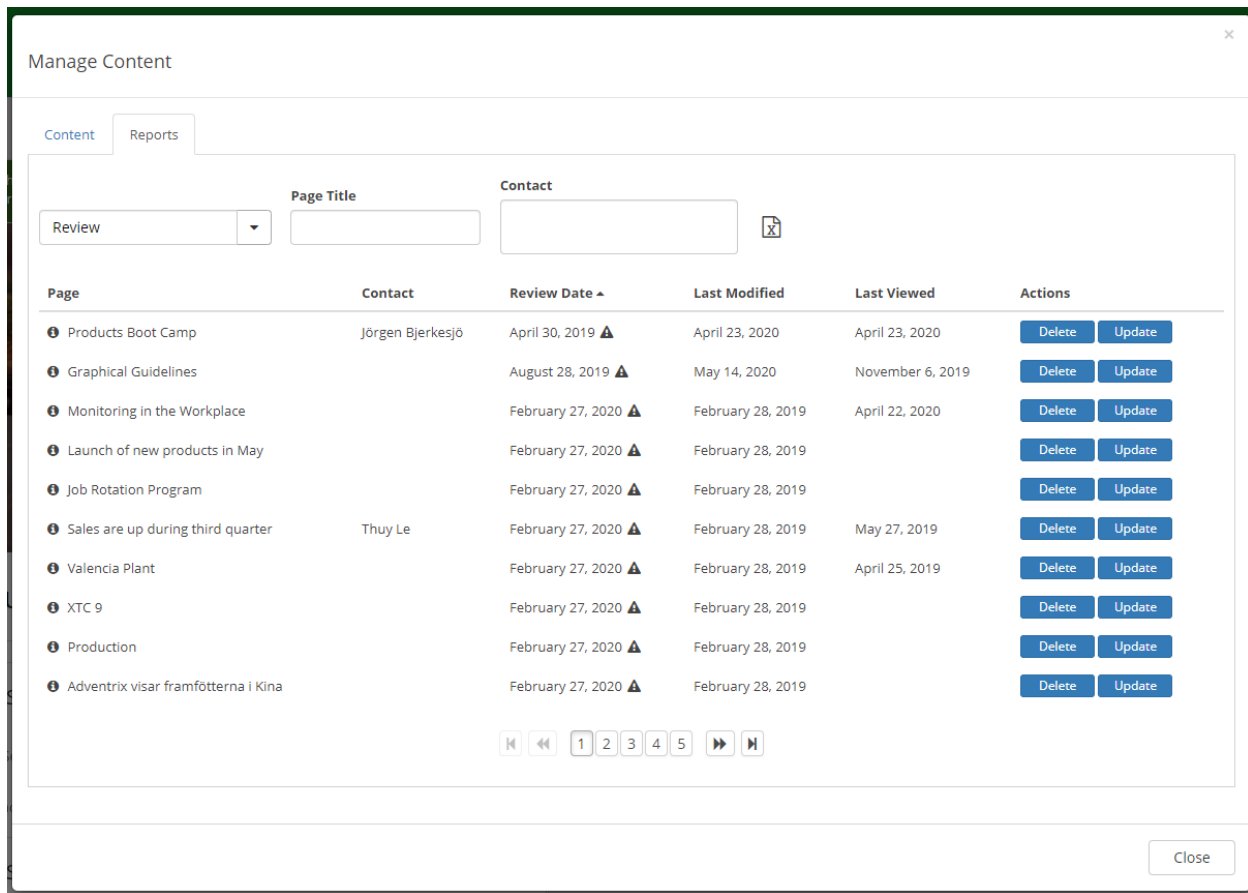


Grunden för verksamheten

Modified
19 maj 2020 kl. 10:23

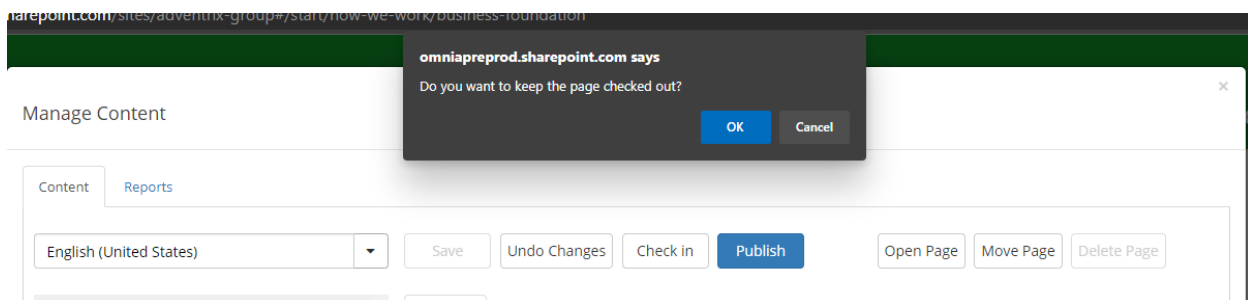
Review Date
27 februari 2020

Find and update all pages and that needs content review in Manage Content Reports: Review view.



Improved Page Content Management - Prompt for changes

Manage content will prompt the user if they try to leave the page without saving or check in.



Enhancements

- Several improvements to align with WCAG 2.1 AA. (#114277)
- Improved behaviour of Request Access for Office 365 Groups.
- Pre-Allocate height for Omnia Header on SharePoint Team Sites.
- Omnia document Management: Review job will now try to self heal if something went wrong during previous runs.

- Omnia blocks small look & feel improvements. (#106917)
- Profile Completion: Display message informing user that a change to the profile image cant be reverted after a new image is uploaded. (#106298)
- Navigation node hover text translation support. (#101774)
- You can now disable support for legacy pages and hide the option in Manage Content. (#102851)
- Quick Search: Better support for wildcard search. (#108186, #107165)
- Possible to show more information about users in quick search. (#105955)

Omnia Document Management

- Read receipt support when publishing ODM documents. (#110992)
- Get a link to a document from ODM blocks. (#113605)
- Show more information when hovering taxonomy values in ODM block. (#114454)

Fixes

- Various IE11 improvement. (#116572, #114995)
- Taxonomy Field Values displayed as Chip issues. (#115280)
- Quick Search: URL problems for Quick Pages. (#106336, #111441)
- User Feed - Show more issues. (#115914)
- Related links and open in Office Web Apps settings issues. (#112240)
- Issues with navigation nodes in mega menu. (#111091, #105853)
- Issues with missing site icons in My Sites. (#106260)
- Button positions in create / request sites dialog. (#106971, #103230)
- Issue with access denied when working with images in Banner block. (#116688)
- Issue with Omnia footer in dialog windows. (#117219)
- Showing the correct translation language e.g. English English Canadian. (#111534)
- Aggregated Calendar various fixes. (#113991, #106644, #108949, #109988, #107054, #113200, #120470, #114137)
- Cant remove link in content editor using RTE editor. (#112781)
- Improvements to Site Template Properties management in Omnia Admin. (#112124)
- News Centre page shown in trending pages block. (#115911)
- Swedish translation of Enterprise Keywords, rendering issues. (#112453)
- Swedish translation of Review date, rendering issues. (#102238)
- Showing completed tasks in My Tasks. (#119617)
- Last updated documents shows documents from sites not followed by the user. (#114614)
- Issues with scheduled publishing and prompt messages. (#116488)
- Issues with navigation in mobile devices. (#116938)
- Sites not getting the correct Icon from Site Template settings. (#108707)
- Issues with Quick Search All Sites Scope. (#112351)

- Issue with related links icons not rendering correct. (#114416)
- Problems with RSS feed not displaying correct. (#116399)
- Issue with Member of view in My sites. (#112432, #115548, #113141)
- Rendering issues for Banner block on mobile devices. (#112436)

Omnia Document Management

- Issue with mixed language displayed in authoring sites. (#112987)
- Issue with setting date on minor revisions. (#117204)
- Issue with tooltip on Create Document Wizard. (#115150)
- Issue with showing the correct file type icon. (#115372)
- Saving issues with “/” character in document name. (#114820)
- Issues when updating column settings on ODM block. (#108701)
- Problem with legacy mode on authoring sites when using modern pages. (#119489)

Quality Management System

- Filtering on QMS Issues not working as expected. (#113016)
- Issues with saving changes to QMS processes. (#109411)

1.28.2

Fixes

- Swedish translation issue for Page Feedback (#119750)
- Problem with showing “last visited” and “Member of” in my sites On-Premises (#117499)
- Login issues on some mobile devices (#116967)
- Targeting on Banners not working as expected (#120928)
- Issue with rendering of news archive for some tenants when clicking link to archive on start page. (#120746)
- Block position rendering issues. (#121102)
- Problem for some tenant to create and update layouts. (#120715)
- Wrong link to page was send in Page Feedback email. (#120930)
- User feed not showing the correct number of likes. (#121107)
- Microsoft starting to remove support for User Feed - News Feed API. (#121216, #121231)
- Issue with refiners (#119874)
- Issue with Revision flow not working on some authoring site due to list threshold limit (#117932)
- Issue with space characters missing when published. (#118734)
- Issue with multiple values on refiners. (#120882)
- Refiner sort order and rendering issues. (#120300, #120301)
- Session has expired issue when using refiners. (#121462, #121814, #121872)
- Not loading for some tenants. (#121047)

- Break word behaviour on shapes. (#119397)

Microsoft

- Microsoft is retiring the SharePoint Newsfeed feature in SharePoint Online. The company feed was made read-only in June 2018, but the API was still working as expected. Without further notice the API has now stopped working as well. This change makes it impossible to render this block. We are really sorry about the inconvenience this may cause. Site Feeds are still working as expected, but we strongly recommend to start looking at alternatives such as Team News, MS Teams or Yammer. Read more: <https://techcommunity.microsoft.com/t5/microsoft-sharepoint-blog/in-june-2018-we-re-making-changes-to-the-native-social/ba-p/178430>

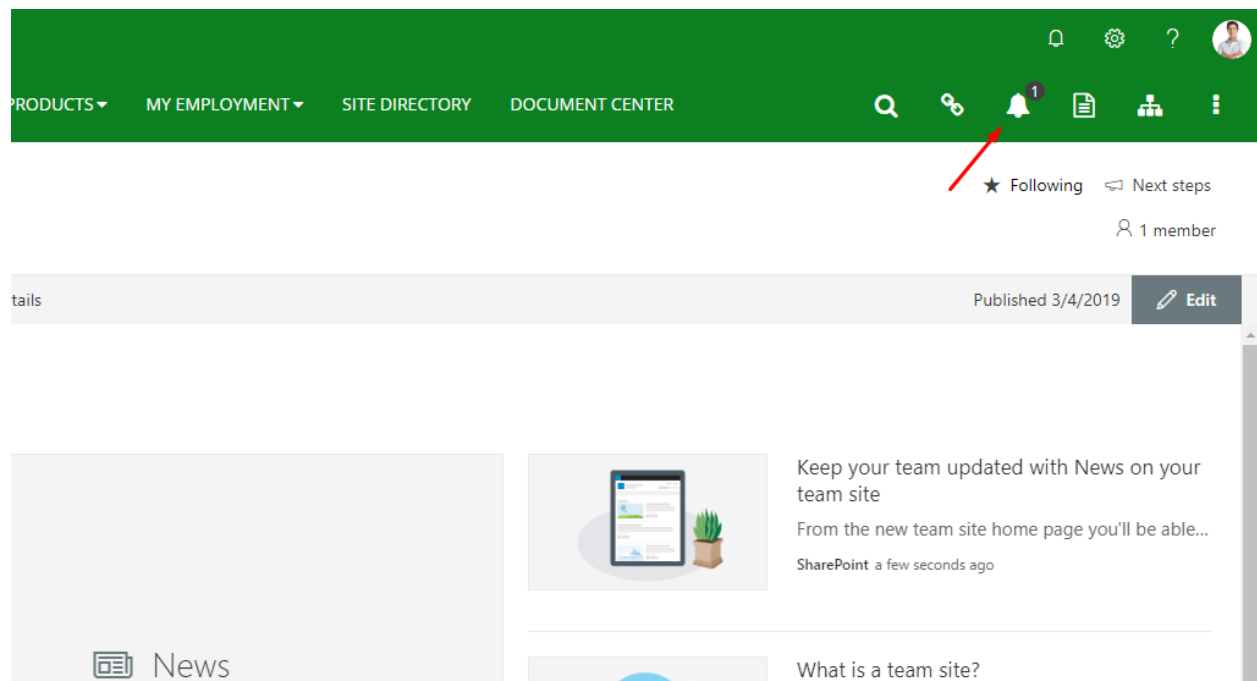
1.10.5 Release Notes November 2019

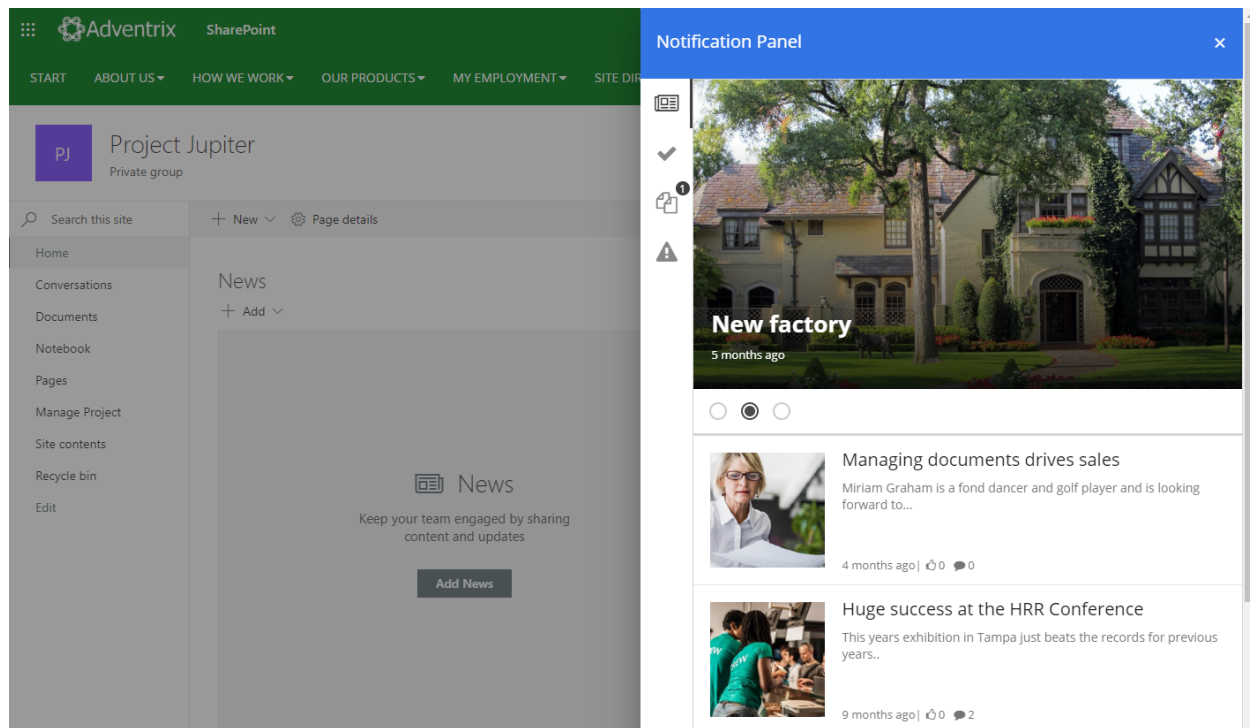
- Omnia.Foundation (1.0.17064)
- Omnia.Intranet (1.0.17083)
- Omnia.QMS (1.0.16909)
- Omnia.DocumentManagement (1.0.16979)

Features

Notification Panel in Header

It is possible to configure a notification panel pinned in the header. Notifications will then be shown wherever you are in the solution.






To set up a notification panel in the header, please follow these steps:

1. Go to Omnia Admin > Settings > Intranet Core.
2. Set “Enable Header Notification Panel” to True.
3. Go to the start page of your solution.
4. Click on “Show Settings” in the action menu.
5. Configure the Notification Panel.

Open News Article in Modal Dialog

The News Viewer can be configured to show news articles in a modal dialog view instead of a link to the page. A news rollout can quickly be browsed through by the end user by clicking on the left and right arrows.



Innovation in focus

Donec blandit feugiat ligula. Hendrerit felis et imperdiet euismod, purus ipsum pretium metus.

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Maecenas porttitor congue massa. Fusce posuere, magna sed pulvinar ultricies, purus lectus malesuada libero, sit amet commodo magna eros quis urna. Nunc viverra imperdiet enim. Fusce est. Vivamus a tellus.

Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas. Proin pharetra nonummy pede. Mauris et orci. Aenean nec lorem. In porttitor. Donec laoreet nonummy augue. In porttitor. Donec laoreet nonummy augue.

Innovation is key for success

Suspendisse dui purus, scelerisque at, vulputate vitae, pretium mattis, nunc. Mauris eget neque at sem venenatis eleifend. Ut nonummy. Fusce aliquet pede non pede. Suspendisse dapibus lorem pellentesque magna. Integer nulla.

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Nunc ac magna. Maecenas odio dolor, vulputate vel, auctor ac, accumsan id, felis. Pellentesque cursus sagittis felis.


Lorem ipsum dolor sit amet, consectetur adipiscing elit. Mauris fermentum dignissim dui eu hendrerit. Nulla ut urna placerat, ullamcorper metus et, vulputate felis. In lobortis rutrum tellus, sed bibendum urna euismod non. Aenean eget aliquet quam. Maecenas in sapien sit amet nibh ornare sagittis. Fusce lobortis vulputate tincidunt. Integer turpis nisi, suscipit eu mollis dictum, suscipit et ex. Pellentesque eu dui eu nibh tristique dignissim. Cras imperdiet lacinia velit. Aliquam lorem metus, laoreet quis varius in, consectetur vitae risus. Phasellus blandit dui ac lorem faucibus hendrerit. Morbi augue urna, sagittis eget ante at, blandit lacinia lectus.

Ut nisi magna, efficitur id aliquam eget, vulputate quis dui. Nullam quis nisi non metus dictum ultrices non non velit. Aliquam nisi dolor, ultrices eu purus ac, condimentum mollis libero. Quisque porttitor congue purus, consectetur pulvinar risus ultricies quis. Duis sodales metus sit amet tincidunt iaculis. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nunc nec sem eu neque ultricies tristique et ut mauris. Mauris placerat nulla at lorem faucibus volutpat. Curabitur ac felis dui. Donec quis efficitur nibh. Ut sit amet dapibus libero. Duis eros tellus, efficitur ac vestibulum sed, efficitur in sapien. Donec hendrerit mi magna, et varius tortor fringilla varius.

Integer justo sapien, tempor ac facilisis a, rutrum sit amet tortor. Donec blandit sed massa nec bibendum. Vivamus eleifend facilisis nisi in laoreet. Aenean ultrices porta purus, eget imperdiet nunc malesuada vel. Suspendisse potenti. Morbi efficitur orci tortor, a convallis elit vestibulum vitae. Etiam nisi mi, tristique sit amet lobortis eu, vestibulum id odio. Maecenas bibendum consectetur velit nec lobortis. Duis venenatis lacus sit amet lorem aliquam vulputate. Sed a erat sit amet erat varius sagittis. Aliquam sagittis est a quam gravida tristique. Maecenas congue lorem non orci sagittis facilisis. Quisque id leo elit.

You like this

 LIKE
  SHARE
  SHARE


 OPEN PAGE

Teams/Yammer icons in My Sites and Site Directory


If you are using Teams and/or Yammer in your solution, it is now possible to show in the navigation whether a team site is attached to a team in Microsoft Teams and/or a group in Yammer.

My Sites


FOLLOWING LAST VISITED MEMBER OF ALL

Filter 



AP

Adventrix PP Workplace 



CD

Gdansk Conference 2020 


DM

HR Department  


GC

Project Jupiter  



HD

Project Saturnus 

OG

QESH department 

PJ

Supplier Conference 2019  



Site Directory

DEPARTMENT OFFICE 365 GROUP PROJECT

Search Sites...


TITLE

DEPARTMENT MANAGER

 HR Department 

Jörgen Bjerkesjö

Department Manager: Jörgen Bjerkesjö

 IT Department

Jörgen Bjerkesjö

- In order for a Teams icon to show, you need to activate the Site Feature “Omnia Intranet Team Site - Microsoft Teams Icon”.
- In order for a Yammer icon to show, you need to activate the Site Feature “Omnia Intranet Team Site - Yammer Icon”.

Turn off Legacy Mode

It is now possible to turn off legacy mode for a site. This will disable all code running Angular and decrease the javascript load times. Note! Any custom extensions built on Angular will stop working if legacy mode is turned off. Follow these steps

1. Go to the start page of the publishing site where you want deactivate legacy mode.
2. Go into Omnia Admin.
3. Remove the site collection feature “Omnia Legacy Support”.
4. Update the site features “Omnia Glue Site” and “Omnia Core Master Page”.

Bug Fixes and Small Improvements

- Fixed an issue with banners floating on top of other blocks in some scenarios.
- The UI of the Script/HTML block has changed to make it easier to separate CSS, Script and HTML.
- Possibility to add Alt text in the Media Picker.
- Fixed issue with tutorial only loading after mouse click in some environments.
- Fixed word break issues for Firefox in the News Viewer.
- Fixed issue with exporting the review report to Excel.
- Made sure that Omnia does not create three versions in the backend in SharePoint when publishing a page.
- If only one targeting definition exists in a tenant, this definition will be preselected when targeting information.

- Made sure mailto-links are supported in related links on a page.
- Fixed issue with additional languages in multilingual pages (such as fr-ca).
- Fixed issue with long navigation titles overlapping other nodes in the mega menu.
- Fixed an issue in the user picker that made it really slow in some scenarios (especially IE11).
- Fixed console error [SiteUrl]/undefined that was registered a lot in tenants where user photo was missing for some users.
- The RSS and Document Rollup block is now available as an SPFx web part.
- Made sure that multi-value is working as expected when targeting an event in the Aggregated Calendar.
- Made sure deleted single item recurring events does not show up in the Aggregated Calendar.
- Fixed the Show More button in the user feed when displayed inside the notification panel.
- Multi-lingual support has been added to the navigation title.
- Made sure the settings gear in the Notification Panel is available in legacy web part pages.
- Multi-lingual support fixed for titles in News Center blocks.
- When adding a group to set permission in Omnia, distribution groups are now filtered out from the picker.
- Fixed a small issue when editing targeted events in the Aggregated Calendar.
- Fixed wysiwyg issue in rich text editor on banners.
- Fixed issue with the People Rollup and page properties when running as a web part on a classic SharePoint page.
- Fixed some issues related to changes in follow site api.
- Made it possible to target information based on preferred language in the user profile.
- Fixed issue with Banner Group getting error if special characters is used in the name.
- It is now possible to save a document type without selecting a default document template.
- Fixed bug in Aggregated Calendar when the built-in field Category was changed to multi-value.
- The Script/Html block has been updated with a new look and feel and the possibility to separate HTML, Script and CSS.
- The Create Page dialog has a new look and feel.
- It is now possible to check in a page and share it with other authors before it is published.
- Added possibility to download a document template in Omnia Admin. (DM)
- Fixed issue that occurred in certain environments where it was not possible to find specific documents in the Bulk Update when searching on a person field. (DM)
- When you create a new draft from the Controlled Documents Viewer, you will now get the same UX as if you create it through the Publish view in the team site. (DM)
- Added possibility to attach a document template to an uploaded document on publishing. (DM)
- When a property change display name centrally, the new name is ensured the next time this property is used in a team site. (DM)
- Made sure the user preferred language is used for property titles in the Create New Document wizard. (DM)
- Made sure that drafts are last modified by the last user that worked with the draft and not the system. (DM)
- Show the document id when selecting a related document. (DM)

- Made it impossible to cancel a workflow if someone has the document open for editing. (DM)
- Made sure the correct drafts library is shown when navigating between modern team sites in the My Sites navigation. (DM)
- Fixed issue with placeholders in footer of DOCX that didn't get replaced on publishing in certain scenarios. (DM)
- Added a Copy Link option in the action menu of published documents. (DM)
- Fixed an issue with validation of certain required properties on publishing. (DM)
- Fixed problem adding more than one Document Subscription via the Controlled Documents Viewer block. (DM)
- Fixed problem with strange word wrap and process steps and wysiwyg issue in the rich text editor. (QMS)
- Fixed some issues with paging etc in the Controlled Documents Viewer when running inside of the Process Viewer in QMS. (DM/QMS)
- Fixed issue with DM/QMS not loading properly on modern team sites in IE11. (DM/QMS)

Release Notes November 2019 Patch 1

Omnia.Foundation (1.0.17203)

- Fixed issue with the My Sites block taking up space on the page even if empty.
- Fixed issue with the RSS Reader in the notification panel.
- Fixed issue with the icons in the My Sites Navigation.
- Fixed issue with not being able to click on the settings icon of the Notification Panel if there is an active notification count.

Omnia.Intranet (1.0.17203)

- Fixed issue with the notification count not showing correctly for the default active tab in the notification panel.
- Fixed issue with the Document Rollup not loading as expected in certain scenarios.
- When refiners is configured to be shown on top in the Document Rollup, they are rendered vertically. This has been fixed and they are now responsive.
- Made sure borders are transparent by default on refiners when shown in the left-hand side of the Document Rollup.
- Fixed issue when editing an existing image in the banner block.
- Fixed bug that made it impossible for admins to delete comments on a page.
- Fixed issue with the radius on people images in the properties block on a page.
- Fixed style issue with selected page in current navigation.
- Fixed issue with comments not being possible to disabled on a page.

Omnia.DocumentManagement (1.0.17102)

- Fixed issue with superscript and subscript in DOCX being wrong in some scenarios in the published version of a controlled document.
- Fixed a problem when updating many controlled documents in batch update.
- Fixed issue when opening pdf in a new window from the Controlled Documents Viewer.

Release Notes November 2019 Patch 2**Omnia.Foundation (1.0.17333) / Omnia.Intranet (1.0.17359)**

Fixed issues with:

- Filters based on Managed Properties in News Center(s) when using special characters.
- Translations not showing correct values in page preview for some customers.
- Missing current navigation on some publishing sites.
- Statistics not being able to aggregate information due to large workloads.
- Alternate text on images not showing on pages.
- Expand arrows in the current navigation when using small screens/devices.
- Quick Poll block not showing on SharePoint Modern Pages.
- Faulty URL when adding a link to an Omnia page via e.g. Banner block.
- Font size on blocks e.g. Banners & Related Links not being aligned.
- Accessing Omnia Admin after new Permission Token has been assigned.
- Accessing Omnia Admin via Omnia header link.
- Changes to Omnia Layouts not being synced to other Omnia Instances.
- Targeting information not being displayed in edit mode e.g. using Banner block.
- All-tab in My Sites displayed twice.
- Email notification not being sent when a new comment is added to a page.
- Omnia Search Center Feature not removing duplicate logos in SharePoint Search Center.
- Taxonomy fields values not displayed correct when viewing the document information.(#117180)
- Date & Time format not being displayed correct for All Day events in the Aggregated Calendar. (#117151)
- Showing followed sites on SharePoint OnPremise.
- Issues with news targeting for some customers (#117353,#117446,#117388)

Omnia.DocumentManagement (1.0.17308)

Fixed issues with:

- Made sure that the approver and approval date is not updated when publishing a minor revision with “Allow To bypass Approval For revisions” enabled.
- Problem downloading files from Document History dialog.

Release Notes November 2019 Patch 3

Omnia.Foundation (1.0.17479-218) / Omnia.Intranet (1.0.17518-224)

Fixed issues with:

- Adding comments using mobile devices. (#115782,#118342)
- Adding links to documents in a Banner Block when on a sub publishing site.
- Combo boxes rendering issues in some browsers.
- Showing the number of comments after comment deletion. (#115908)
- Problems with duplicate comments added. (#117538, #117564, #117497)
- Adding and showing new term value using the taxonomy picker. (#117516)
- Showing the date value in the document rollup. (#117597, #117627)
- News Viewer filtering on special characters. (#116308)
- Size of Important Announcements text.
- Showing Calendar Legend in Aggregated Calendar block. (#117539, #117546)
- Opening Omnia Admin in some versions of Chrome. (#117434)

Enhancements - “We have done the following improvements to try and mitigate the issues e.g. throttling and service interruptions, caused by the unprecedented demand on Microsoft Services due to COVID-19 pandemic:”

- Omnia will now display an informational message when it has problems connecting to SharePoint Services.
- Improvements regarding CSOM calls to SharePoint with enhanced retry logic.

Omnia.DocumentManagement (1.0.17461-411)

Fixed issues with:

- Document types not showing up correct in document type picker. (#117986)
- Issues with SVG files using special characters in file name. (#116934)

Quality.Management.System (1.0.17414-204)

Fixed issues with:

- Moving a process. (#117887)

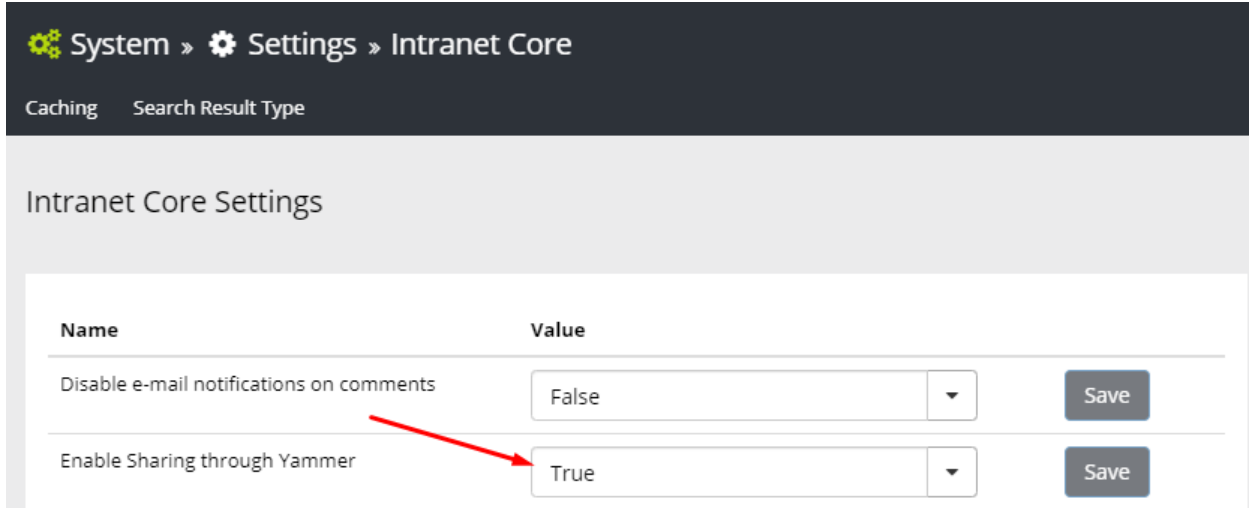
1.10.6 Release Notes June 2019

- Omnia.Foundation (1.0.16056)
- Omnia.Intranet (1.0.16070)
- Omnia.DocumentManagement (1.0.16092)
- Omnia.QMS (1.0.16077)

Features

Improved Yammer Integration

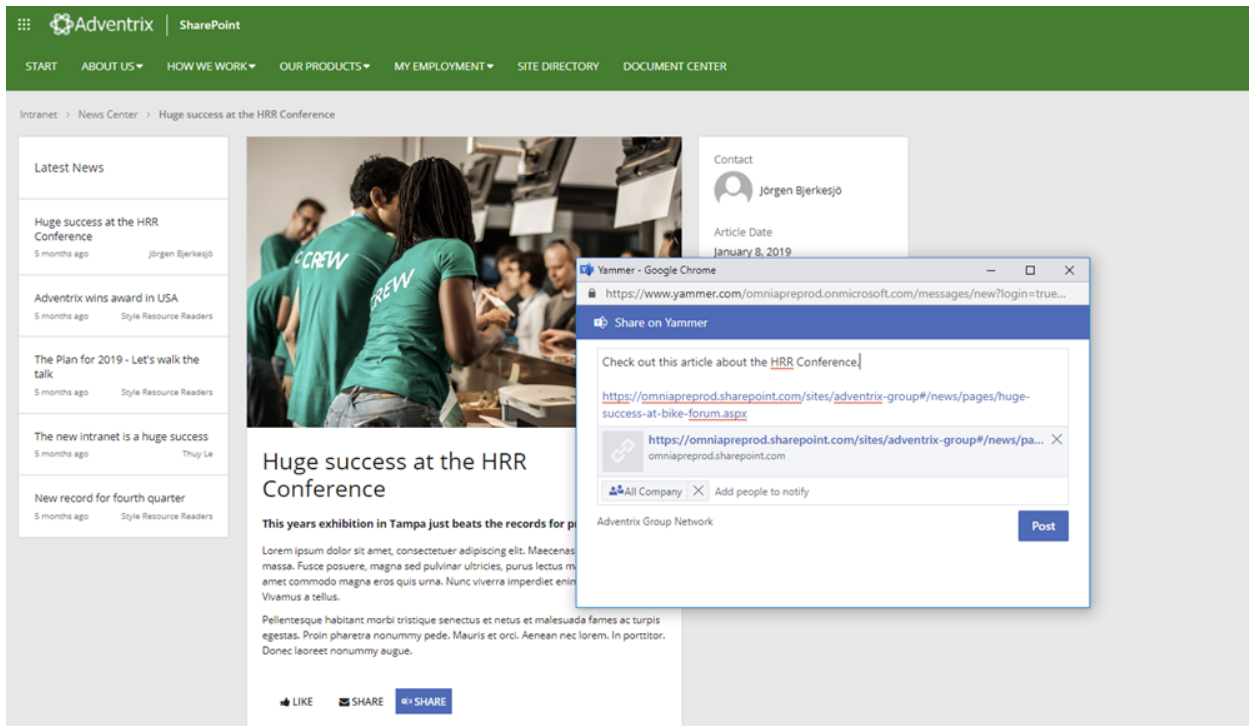
You can setup the share feature on a page to allow sharing to Yammer.



The screenshot shows the 'Intranet Core Settings' page. At the top, there is a breadcrumb trail: 'System » Settings » Intranet Core'. Below this, there are two tabs: 'Caching' and 'Search Result Type'. The main heading is 'Intranet Core Settings'. Below the heading is a table with two columns: 'Name' and 'Value'. The table has two rows. The first row is 'Disable e-mail notifications on comments' with a value of 'False'. The second row is 'Enable Sharing through Yammer' with a value of 'True'. A red arrow points to the 'True' value in the second row. To the right of each row is a 'Save' button.

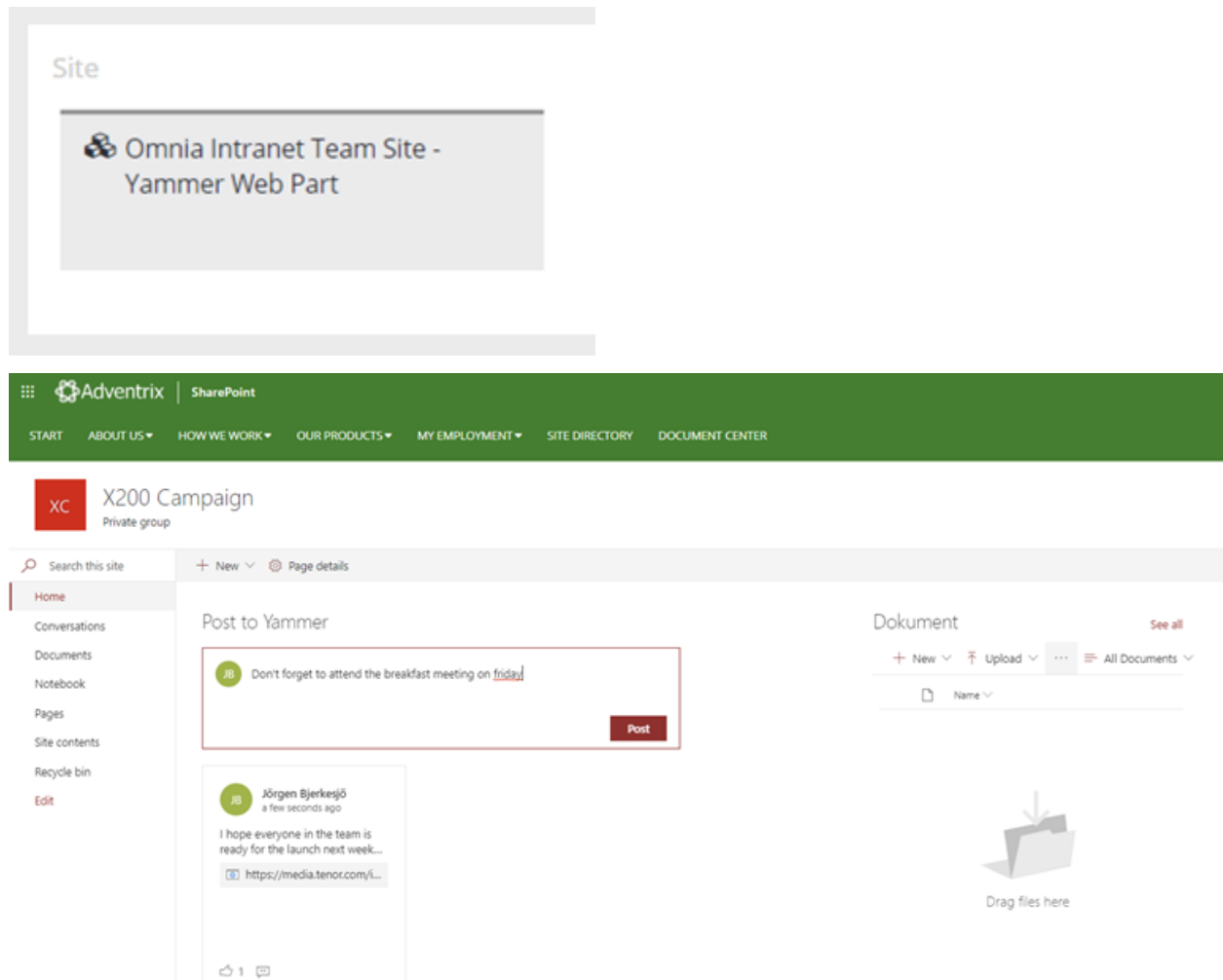
Name	Value
Disable e-mail notifications on comments	False
Enable Sharing through Yammer	True

When Yammer sharing is enabled, a new button will appear on pages that makes it possible to create a new post in Yammer.



The screenshot shows the Adventrix SharePoint site. The top navigation bar is green and contains the Adventrix logo and the text 'SharePoint'. Below the navigation bar is a list of links: 'START', 'ABOUT US', 'HOW WE WORK', 'OUR PRODUCTS', 'MY EMPLOYMENT', 'SITE DIRECTORY', and 'DOCUMENT CENTER'. The main content area shows a news article titled 'Huge success at the HRR Conference' by Jörgen Bjerkesjö. The article has a large image of people in green shirts. To the right of the article is a 'Contact' box for Jörgen Bjerkesjö and an 'Article Date' of January 8, 2019. A 'Yammer - Google Chrome' window is overlaid on the article, showing a 'Share on Yammer' button and a text area with the article title and URL. The window also shows a 'Post' button and a 'Yammer Group Network' section.

A new site scoped feature “Omnia Intranet Team Site - Yammer Web Part” is available that makes it possible to deploy the new Modern Web Part to the welcome page of a modern team site.

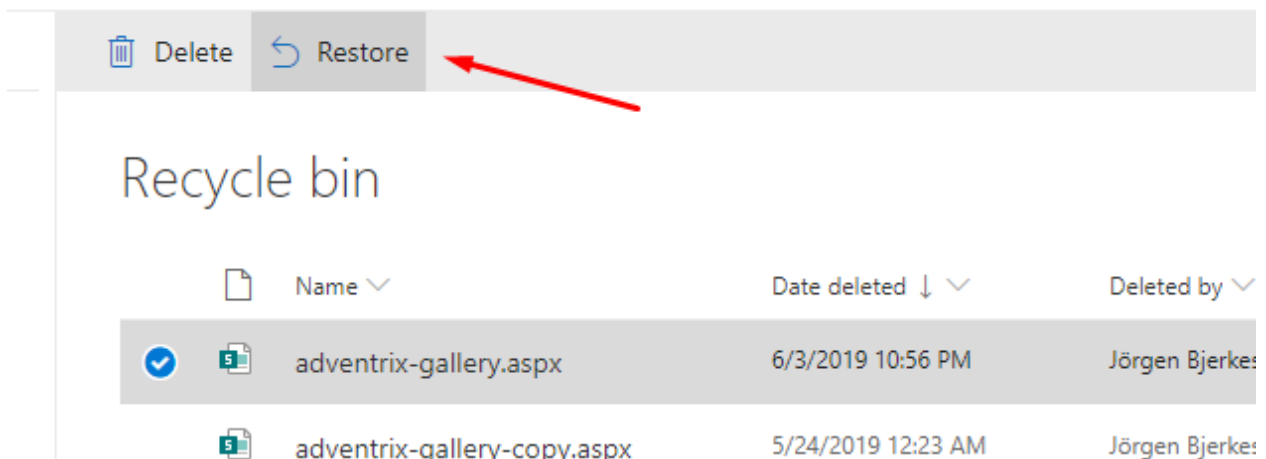


Web Content Management Improvements

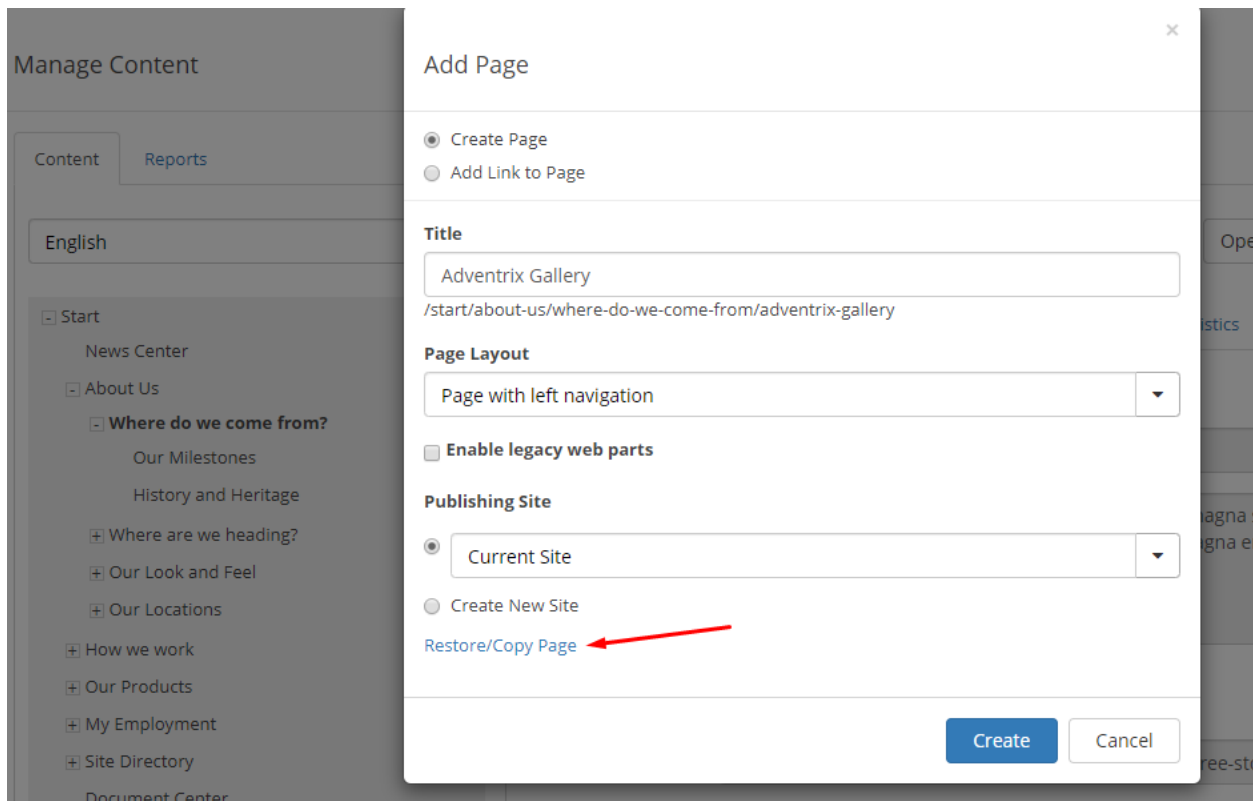
Restore (Copy) Page

It is now possible to restore a page to the navigation menu in Manage Content. To do this:

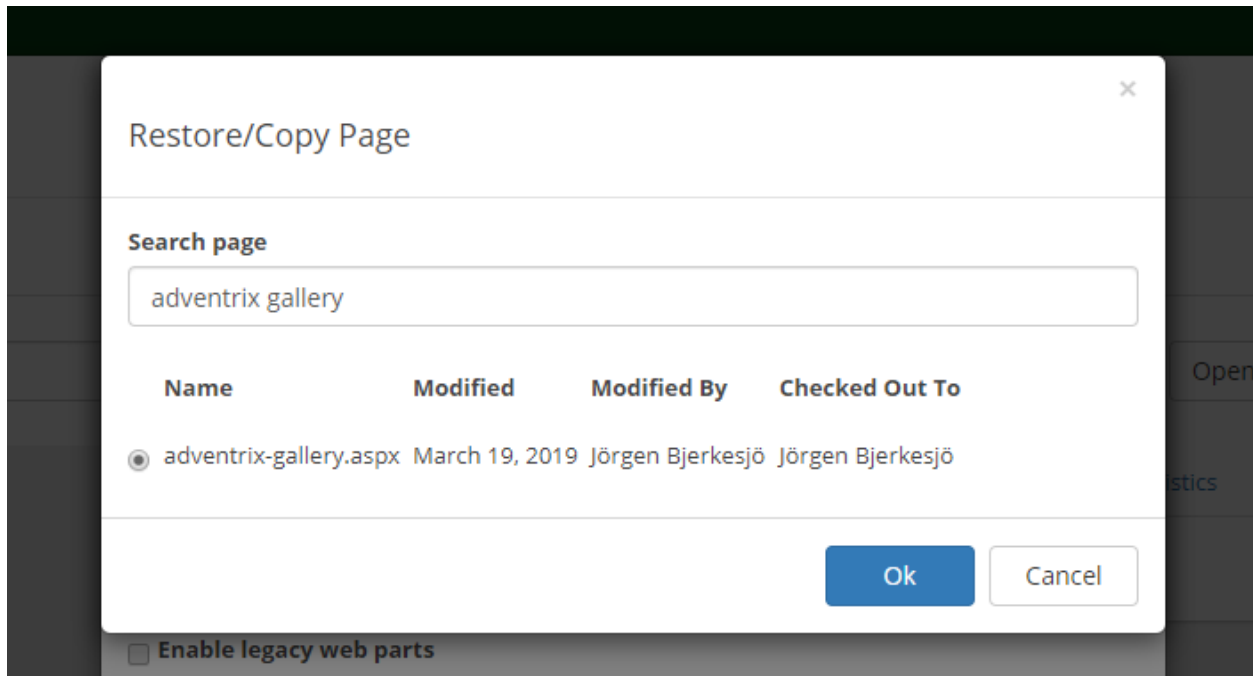
1. Go to the Recycle bin in SharePoint.
2. Restore the aspx page.



3. Open Manage Content and start the creation of a new page in the location where you want to restore the page.
4. Click on Advanced Settings in the Create Page dialog and click on Restore/Copy Page.



5. Find the page that you restored from the Recycle Bin and select it.



6. Create the page. A new navigation node will now be created related to the restored page in the Pages library.

Note! If you restore a page in the navigation node that already exist in the structure, a copy will be created of the page in the Pages library.

New Settings in News Roller

Three new settings have been added to the News Roller:

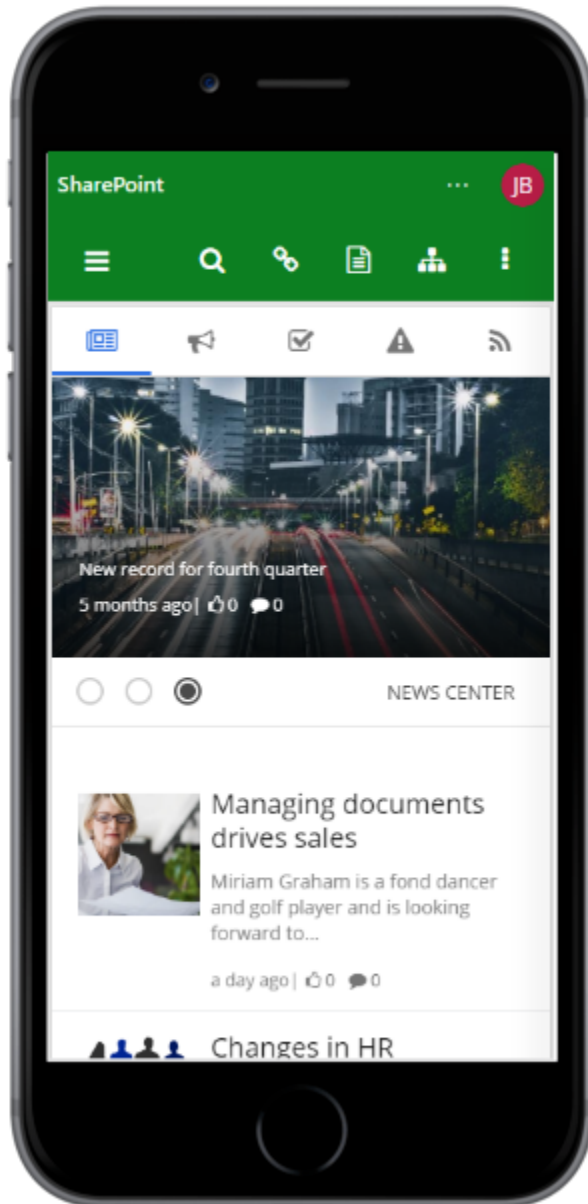
- Transition: Can be either Slide or Fade.
- Interval time: Number of milliseconds between transitions.
- Number of laps: The number of times the news roller should show all articles before it stops.

Related News Improvement

It is possible to configure the Related News block to be based on any Managed Metadata column.

Improved Mobile Experience

All modern blocks and components have been reviewed on several mobile devices to enhance the mobile experience overall.



Save to OneDrive

The Create Document Wizard can now be configured to allow the user to save to OneDrive.


Create New Document

☐ Controlled Document

Select a template

English

Select a location

 Adventrix Presentation Template

NAME

Title

ADX 100 - March Campaign

File Name


ADX 100 - March Campaign

.pptx

SUGGESTED

FOLLOWED

ALL

 OneDrive

IF

IT France

PT

ProDev Team

GR

Global R & D

QT

QESH Team

CC


Corporate Communication


GM


Global Marketing

ID

IT Department

 2 - Sales and Marketing

 Marketing Ideas

 New folder

CREATE

CANCEL

Follow these steps to activate the feature:

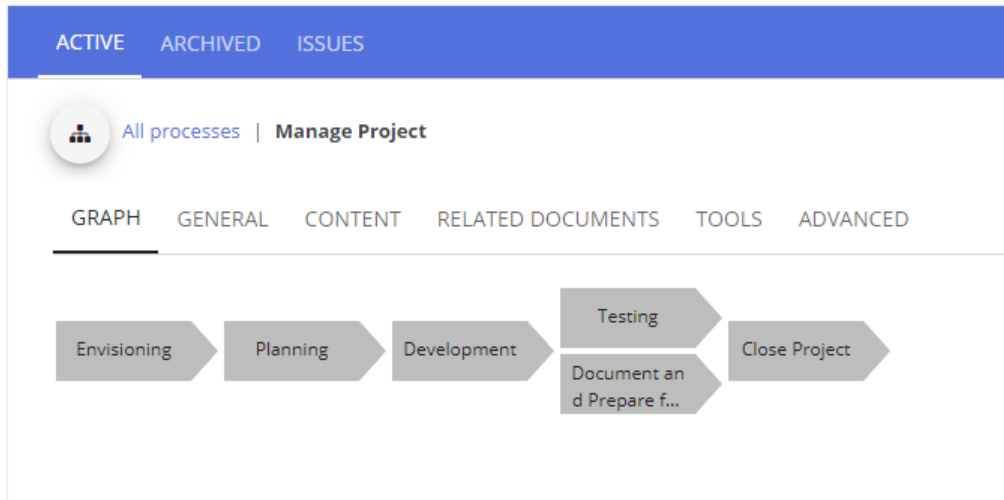
1. Log in as a global administrator in Office 365.
2. Go to Omnia Admin > System > Settings > Azure AD.
3. Click on Reconsent Azure Services. (In order to let the user save to OneDrive, additional permissions are needed by the Azure AD app).
4. Go to System > Extensions and click on Omnia.DocumentManagement.
5. Set the setting “integrated with onedrive” to “true”.

Process Size

It is now possible to edit the width of shapes for a process if the shapes are too small to fit the text.

632

Chapter 1. Topics

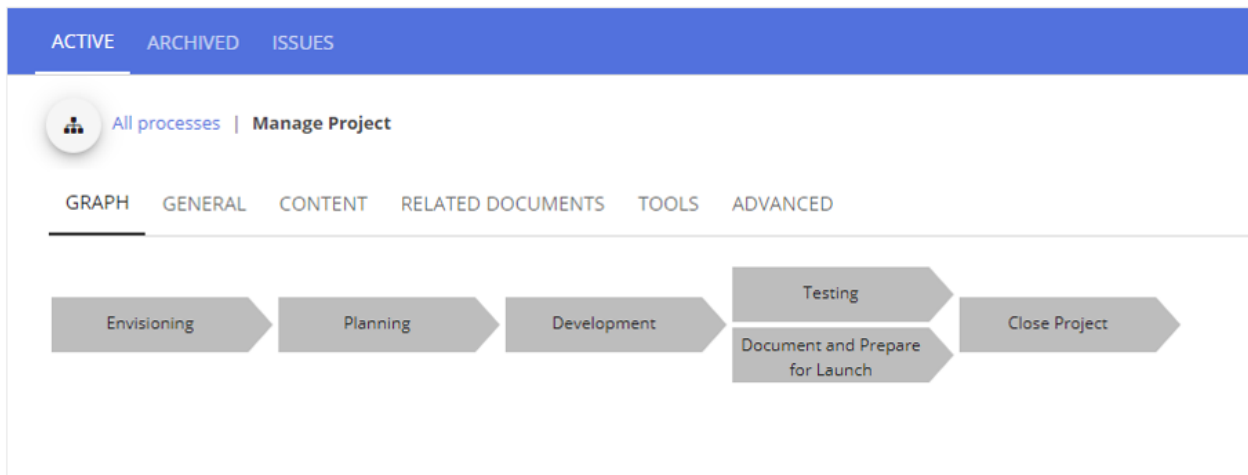


Review interval

24 Months

Min width of shape (in px)

165



Custom process images can also be limited in size if needed.

Bug Fixes and Small Improvements

- Fixed issue with recurring events in the Month View in the Aggrgrated Calendar.
- Fixed issue with closing the Likes dialog in the comments section of an Important Announcement.
- Fixed an issue in the News Roller (New) when having several News Viewers on the same page.
- Fixed issue with moving a page in Manage Content from one sub publishing site to another.
- Fixed problem with fine grained permissions on User Profiles in Omnia Admin.

- The News Center Site Template has been deprecated. Use the setup documentation instead to set up a new News Center site: <https://omnia-docs.readthedocs.io/en/latest/web-content-management/news/setup/news-center>.
- CSS classes have been added to all vue components for extension developers to use.
- Fixed issue with translated columns in SharePoint showing wrong display name in Omnia blocks.
- Fixed a graphical design issue with the New icon in the News Viewer.
- Made sure page properties of type Person works as multi-value on pages.
- Fixed issue with Enterprise Keywords as a Site Property when the column is not deployed to a team site.
- The Statistics and Reports tab are now available on news articles as well.
- The “Edit Tutorial” button has been moved to the action menu in the header. If a page has a tutorial, a Tutorial button will be shown for the end user in the header.
- Fixed issue with Take Ownership option not being available in the Checked Out report if filter on Checked Out to was applied.
- Fixed issue in My Links control when clicking on cancel/back button.
- Fixed some graphical design issues in the News Viewer.
- Add the option “None” for conversations in Site Templates.
- Fixed graphical design overflow issue in banners in Internet Explorer 11.
- If you hover the news roller, it will now stop the carousel.
- Fixed issue with Created date always showing english date format in the Site Directory.
- A new setting has been added to the High Priority Announcements block that will make it possible to set a time interval in minutes on how often the page should poll for new announcements. The default value is 5 minutes.
- The Media Picker is now fully extendable and it is possible in Omnia Admin to select which providers that should be used.
- If there is only one page layout available in a publishing site, the Create Page dialog will not show the page layouts dropdown.
- The available layouts setting on a publishing site in Omnia Admin will only affect the Create Page dialog, not the selection in edit mode.
- Removed the possibility to add an image in the rich text of a banner.
- Fixed issue with e-mail validation in the Contact Information form in Omnia Admin.
- Fixed some issues in the comments dialog on important announcements.
- Changed the logic of the last updated documents query to make sure PDF documents don’t have modified dates in the future.
- Fixed the feedback address in user profiles in Omnia Admin to accept dot character.
- Fixed some graphical design issues with alignment of banners in larger zone.
- Made sure you can click Enter in the search box in My Sites without navigating away to another page.
- Fixed issue with language picker showing draft translations in the drop down.
- Fixed issue with duplicate sites in the My Sites control that could appear in certain scenarios.
- Fixed some issues with the Last Updated Documents block not showing the correct result in certain scenarios.
- Removed the click-out possibility in the Create Personal Link form in My Links.
- Fixed whitespace that appeared in the bottom of a page when closing a high priority important announcement.

- Fixed issue with the Privacy setting when approving an Office 365 group in Omnia Admin.
- Fixed problem with special characters being accepted in the Office 365 group creation form which leads to errors when the group is created.
- Made sure the selected Site Template is shown when approving a site request.
- Fixed some issues when hovering events in the Aggregated Calendar.
- Fixed graphical issue on page when switching language.
- Fixed problem with profile pictures on-prem in People Rollup.
- Made it possible to point the Report Error link in Omnia Admin to different locations dependant on support agreement.
- Fixed issue with required columns in the SharePoint Pages library in combination with uploading images in the new media picker.
- Fixed some minor issues in the Color Picker.
- Fixed issue with Manage Content not always being shown the first time
- Fixed issue that could happen with the master page feature on site provisioning in rare cases.
- Fixed problem with the sum of likes in the Trending Pages block.
- Fixed some issues related to the Profile Completeness wizard on-prem.
- Fixed issue with readers not being able to access the PublishingFeedImages folder on-prem.
- Fixed issue with aggregated calendar showing Invalid Date in certain versions of iOS.
- Fixed some issues with recurrent events in the aggregated calendar.
- Increased the timeout period for the My Sites query in slow tenants.
- Fixed problem that could happen when uploading images in the User Feed.
- Fixed issue with names sometimes adding null to the end of the name when creating an Office 365 Group.
- Fixed problem with the filter in the Member of tab in the My Sites navigation.
- Fixed accessibility bug in the Page Properties block.
- It is now possible to rename a document template without having to manually map it again. (DM)
- Fixed an issue with the Document History placeholder not being rendered in certain scenarios on publishing. (DM)
- Added better error handling when SharePoint Search returns 403 error. (DM)
- Ensured the icon to create new document in Controlled Documents Viewer is added by default when shown inside the Process Viewer in QMS. (DM)
- Fixed scrollbar issue when running DM in Teams. (DM)
- Made sure documents are paged correctly when shown in Controlled Documents Viewer inside the Process Viewer in QMS. (DM)
- When a controlled document is published, it will now get prescanned to see if it includes any invalid uri. (DM)
- Fixed problem with the send for comments workflow. It is now possible to complete a review task even if someone else has the document open. (DM)
- Fixed some issues with sorting after doing a full text search in the Controlled Documents Viewer. (DM)
- The properties section in the Create Document Wizard is now hidden if the document type don't have any properties. (DM)

- Fixed issue with default values on properties not being able to be translated. (DM)
- Fixed paging issue in the edit UI when having many related Controlled Documents on a process. (QMS)
- Fixed issue with certain user names not being shown when a task was assigned in the Process Viewer. (QMS)
- Fixed issue with overlapping process steps in modern Team Sites. (QMS)
- Made it possible to select an AD Security Group when limiting read access on a published process. (QMS)
- Fixed issue with indentation in content editor. (QMS)



1.10.7 Release Notes March 2019


- Omnia.Foundation (1.0.15438)
- Omnia.Intranet (1.0.15513)
- Omnia.QMS (1.0.15650)
- Omnia.DocumentManagement (1.0.15659)


Features

Office 365 Group Naming Policies

The site creation process is now fully compliant with Office 365 Group Naming Policies.

 Create Site 

 Templates

 Information

Title*

HR Group

Site name cannot contain the blocked word "HR" as per company policy

Group email address

hrgroup

Description

Privacy

Private - Only approved members can see what's inside

Time zone

(UTC+01:00) Amsterdam, Berlin, Bern, Rome, Stockholm, Vienna

☒ Make Public in Site Directory

← Create Site

×

✓ Templates

2 Information

3 Properties

Title*

Project Alpha

Retail - Project Alpha (United States)

✓ The site name is available

Group email address

projectalpha

Retail-projectalphaUnitedStates

✓ The group alias is available

Url

/sites/Retail-projectalphaUnitedStates

Description

Privacy

Private - Only approved members can see what's inside

Time zone

(UTC+01:00) Amsterdam, Berlin, Bern, Rome, Stockholm, Vienna

✓ Make Public in Site Directory

Media Picker Improvements

The new Media Picker now supports a custom ratio when adding pictures to a page.

Edit Photo

Custom:



Landscape: 16 x 9



Square: 1 x 1



Filters

☐ Sepia ☐ Grayscale

Brightness

Contrast

Saturation

The new Media Picker is now available when adding media in content on a page.

Start > About Us > Where do we come from? > Adventrix Gallery

WHERE DO WE COME FROM? ^

OUR MILESTONES


ADVENTRIX GALLERY

HISTORY AND HERITAGE


WHERE ARE WE HEADING? v

OUR LOOK AND FEEL v

OUR LOCATIONS v




Adventrix Gallery





Proin pharetra nonummy pede. Mauris et orci. Aenean nec lorem ipsum tordnet.

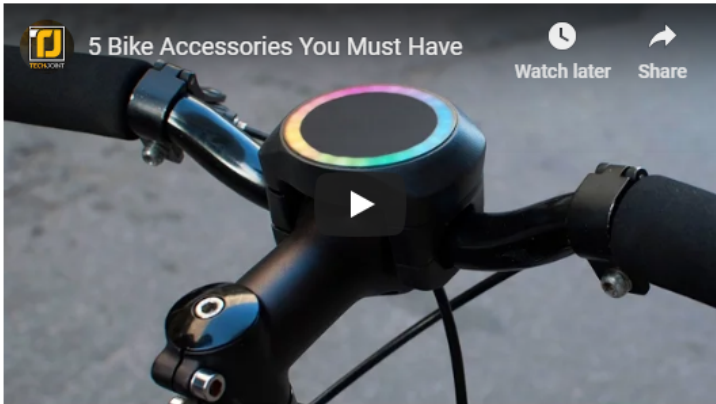
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Maecenas porttitor congue massa. Fusce posuere, magna sed pulvinar ultricies, purus lectus malesuada libero, sit amet commodo magna eros quis urna.

Nunc viverra imperdiet enim. Fusce est. Vivamus a tellus. Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas. Proin pharetra nonummy pede. Mauris et orci. Aenean nec lorem. In porttitor. Donec laoreet nonummy augue.

 5 Bike Accessories You Must Have

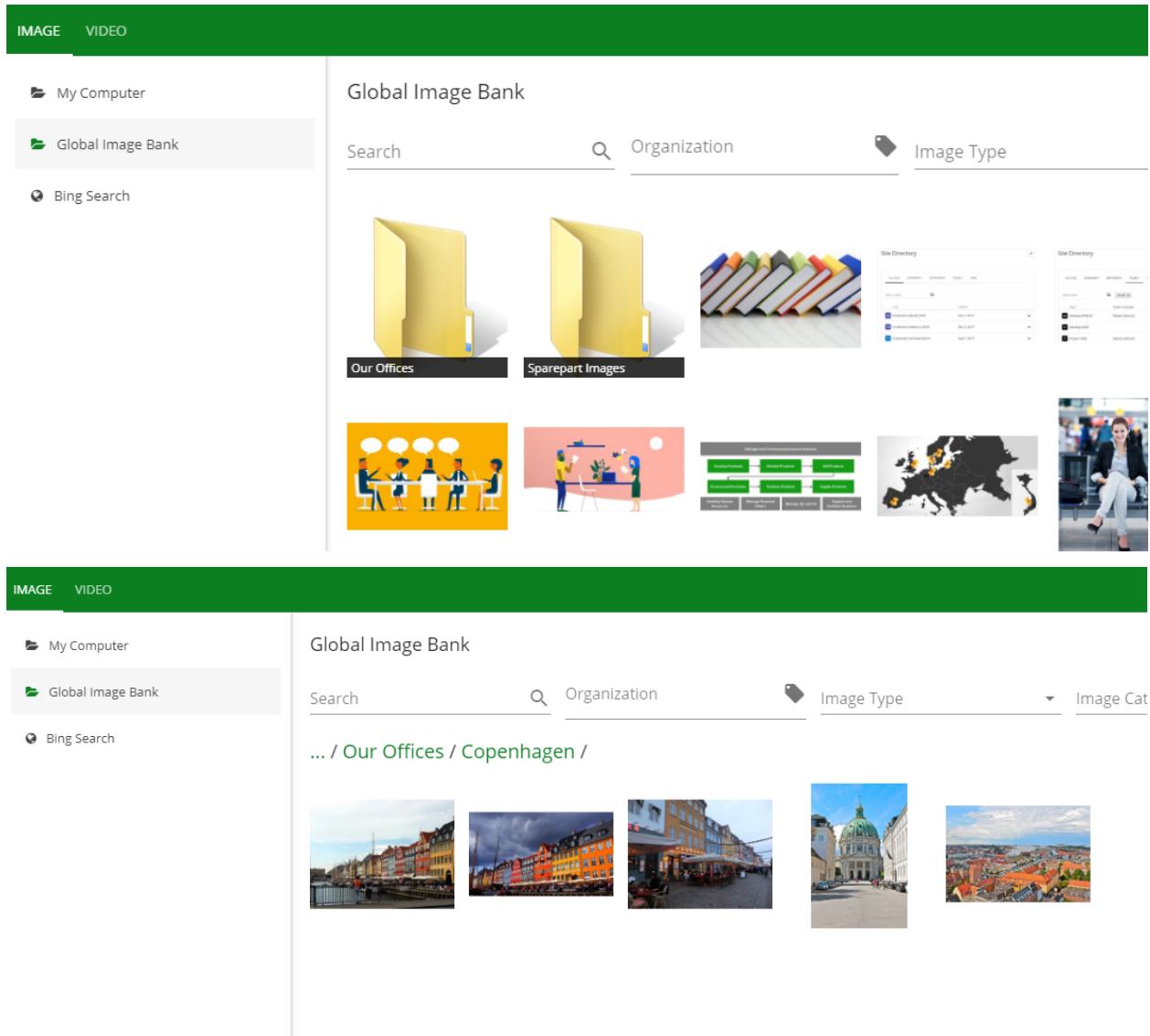
 Watch later

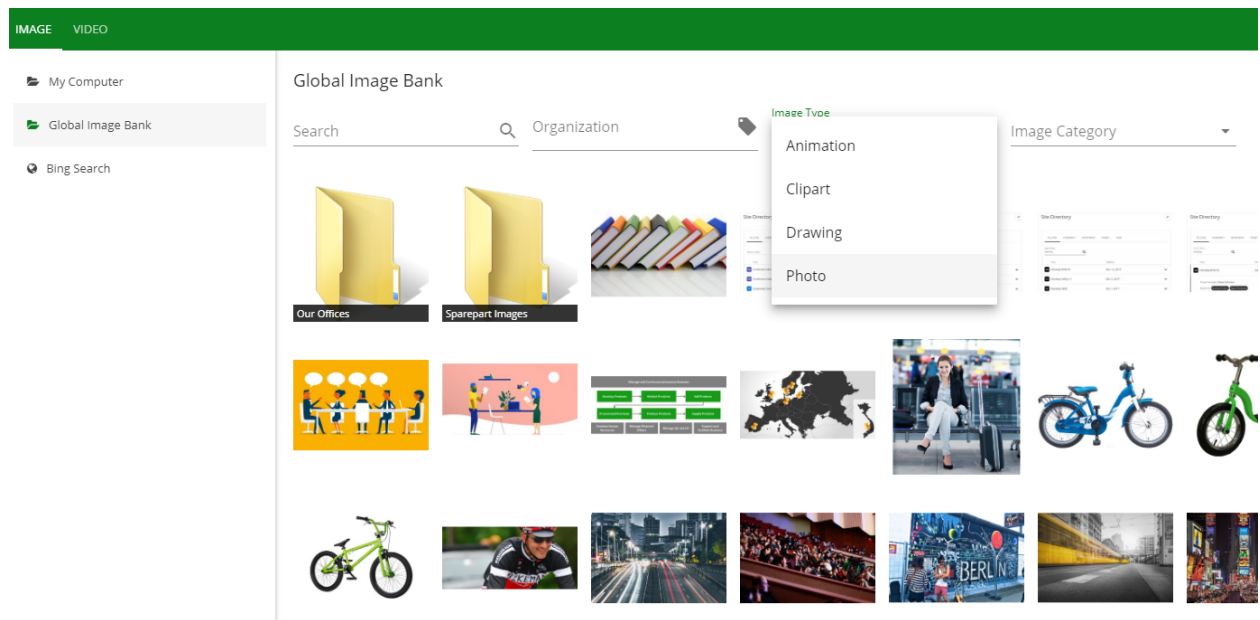
 Share



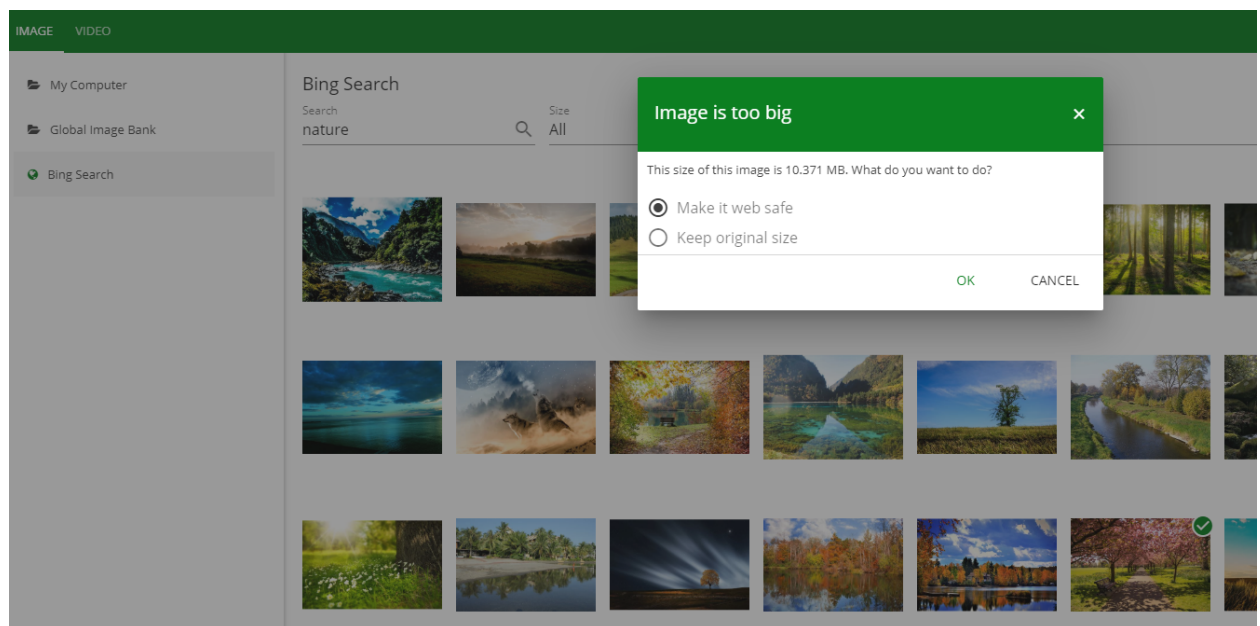
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The new Media Picker now supports both folders and filters in central image locations.





Warning for big images and the possibility to make them web safe has been implemented.



Comments Improvements

For multilingual publishing portals, it is now possible to configure the comments on a page to be shared between languages.

Content Management » Multilingual Social Settings

Multilingual Social Settings

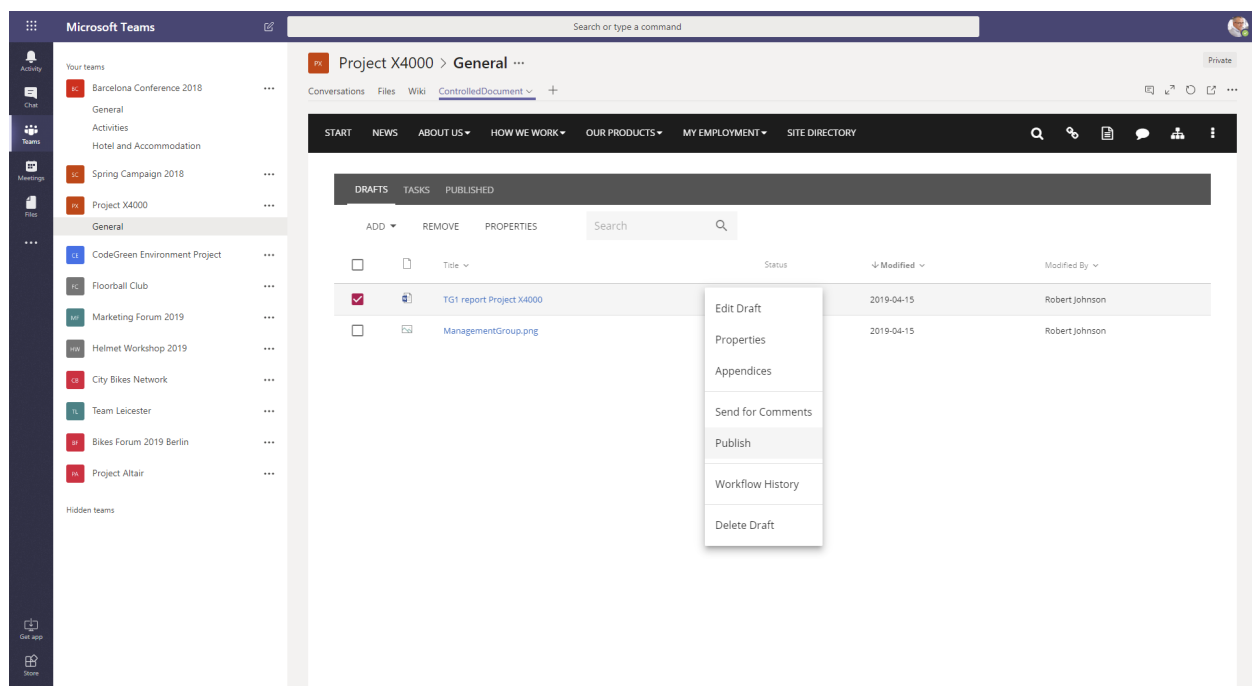
☒ Enable one comments and likes flow for multilingual pages in this site collection

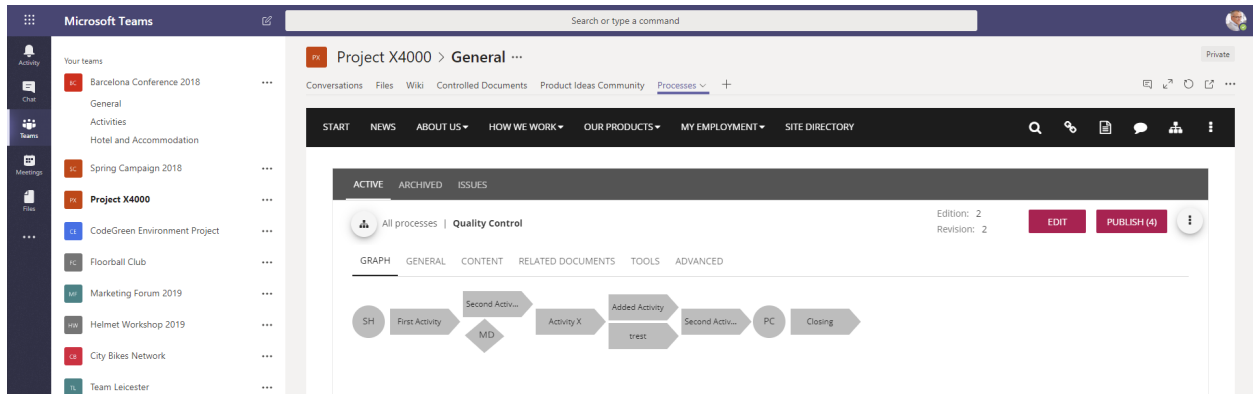
Save

Changed behaviour when deleting a comment. If a comment is deleted it will be totally removed from the comments feed. It will only show the message “Comment has been deleted by...” if the comment has replies.

Compliant with Microsoft Teams

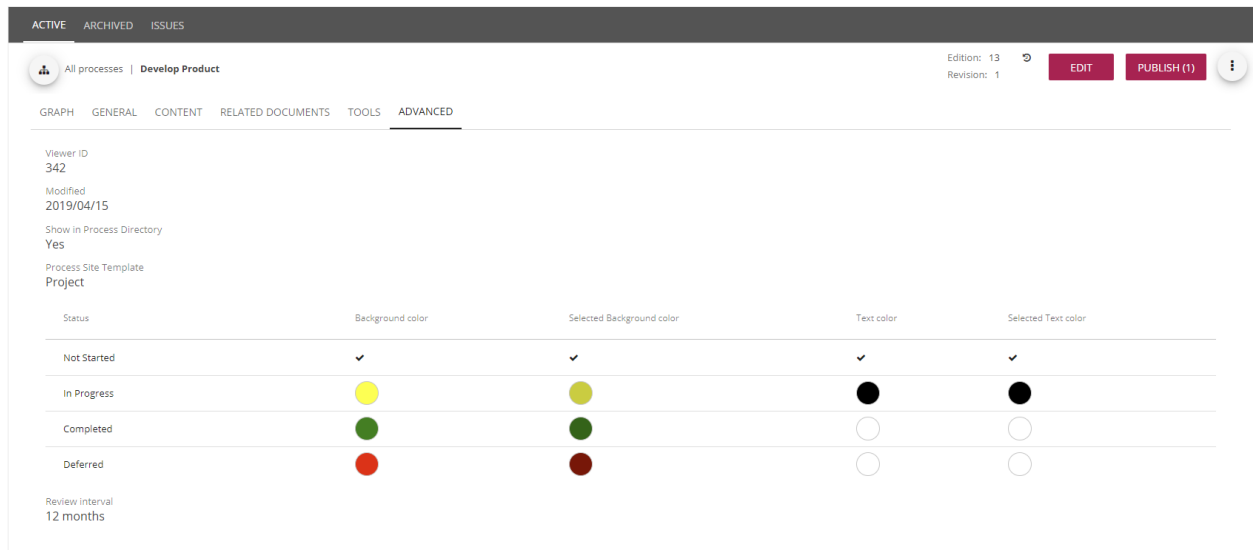
Both QMS and DM can now run in Microsoft Teams.





Status on Process Steps (QMS)

It is possible on a process to configure it as a template for a one or more site templates. A new feature added to process templates is the possibility to configure a number of available statuses on a process step.



This configuration can then be used on a team site to set status on process steps for this specific process instance.

Manage Project > Initiate > Set High-level Scope

Set High-level Scope

ADD FEEDBACK

Identify needs

Identify stake

Set High-level...

Suggest Org...

Create Business...

DESCRIPTIONDOCUMENTSTOOLSTASKSDetails

Version		Info		Status
Modified	2019-02-21	ID	619	

Not Started

In Progress

Completed

Deferred

PROJECT CENTEREXPORT PROCESS

Retention Policies and Termination of Documents

It is possible to setup a Retention Manager in the Document Management settings.

Retention Manager

Adele Vance x

Save

If a Retention Manager is setup, a new tab will be visible on Document Types to set a Retention Policy.

Document Management » Document Types

Document Types

- Corporate Policy
- Corporate Template
- Corporate Form
- Work Instruction
- Checklist
- Business Plan
- Product Manual
- Application Manual
- Handbook Document
- Meeting Minutes
- Press Release
- Supplier Agreement
- Project Management
- Office Documents

General Publish Review Archive Retention

☒ Limit Retention

☒ Calculated

Last Published
+
5
years

☐ Specific Date

When a controlled document is published, a Retention Date will be set on the document based on the policy. The Retention Manager will get an e-mail when the Retention Date of a document is reached. The e-mail will include a link to a page where the document can be terminated (completely removed from the system).

Document Management » Document Termination

Document Id:

ADX-87
Find

Retention Date: 2024-04-15

	Title	Status	Edition	Modified
	Set up new server 1	Published	3	2018-05-03
	Set up new server	Archived	1	2018-04-18
	Set up new server	Archived	2	2018-05-03
	Set up new server	Unprocessed	1	2018-03-20
	Set up new server	Unprocessed	2	2018-04-20
	Set up new server 1	Unprocessed	3	2019-04-15
	Set up new server 1	Unprocessed	4	2019-04-15

Delete Files

In order to completely remove a controlled document from the system (termination), you need to find the document based on the unique document id. The Document Termination page will show all files that will be deleted from the system (drafts, appendices, hidden files, published and archived files). Once a controlled document is terminated, it can not be restored. (The individual files can be recycled from SharePoint for an additional period of time).

Document History (DM)

A new Place Holder can be added to documents to show the history of a document: `[[_DocHistory]]`. The Place Holder will be replaced by a document table on publishing.



Anti-discrimination policy		Type Corporate Policy	Doc. Id ADX-51
Approved 2019-04-15 by Robert Johnson	Owner Anna Karlsson	Revision date 2020-04-15	Edition 5

Document History

Edition	Revision	Published	Comment
5		2019-04-15	Changes to chapter 4 to align with new discrimination laws.
4		2018-05-30	Republished by system. Property "Document Owner" updated. "Robert Johnson" replaced with "Anna Karlsson".
3		2018-03-09	Changes to section 1.2
2		2018-02-21	Convert to PDF.
1		2018-02-21	

Anti-discrimination policy

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Maecenas porttitor congue massa. Fusce posuere, magna sed pulvinar ultricies, purus lectus malesuada libero, sit amet commodo magna eros quis urna.

Nunc viverra imperdiet enim. Fusce est. Vivamus a tellus.

Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas. Proin pharetra

Bug Fixes and Small Improvements

- Fixed issue with default properties in the Term Picker.
- New setting in Site Templates of type Office 365 Group to allow administration of SharePoint Groups.
- Possibility to set Item Limit in the aggregated calendar for upcoming events.
- Fixed a number of issues in the aggregated calendar related to recurring events and timezone.
- Fixed graphical design issue in team site grouping of announcements in the Announcements block.
- Fixed issue with settings icon when banner is located in the notification panel.
- Fixed issue with page comments crashing on a page if a user that has submitted a comment is removed from Azure AD.
- Fixed problem with assigning admin access rights to Site Templates only in Omnia Admin.
- Fixed issue with showing properties on certain documents in the Document Rollup when a user has been removed from Azure AD.

- Fixed issue related to visitors not being able to upload images in the User Feed (when using an Everyone site in the feed).
- Updated the Conversation link to Teams in team sites to a more stable version.
- Added setting to allow the possibility to have labels on categories in the Notification Panel and decide number of categories per row.
- Added setting to the Site Directory block to decide whether to open the sites in a new window/tab or not.
- Fixed token timing issue in onprem environments. This could cause temporary unexpected errors for users.
- Performance improvements on the Publish function. (QMS)
- Fixed issue when clicking “Enter” in search box in Process Directory. (QMS)
- Fixed problem uploading large file size in Tools. (QMS)
- Replaced sub process and process item labels with process step. (QMS)
- Improved read-only mode in Process Library. (QMS)
- Fixed size of Process Library in modern sites so that it uses 100% of the column width. (QMS)
- Performance improvements when loading process. (QMS)
- Show text on all shapes. (QMS)
- Made it possible to associate a SharePoint Task list to the Process library. If Task list is associated, actions in issues will become SharePoint tasks. (QMS)
- When you go from edit to read mode in the Process library it stays on the same tab. (QMS)
- Fixed issue with moving process from sub site to parent site. (QMS)
- Changed ui flow. When a process step is created, it stays on the current process. (QMS)
- Deviations/Improvements are renamed Issues. (QMS)
- Made sure the content area uses a bigger height. (QMS)
- Fixed issue with the date picker closing when selecting another year than the current one. (DM)
- Fixed issue with the Document Id property not being correctly used in related documents. (DM)
- Fixed issue with certain users getting error in the Create Document Wizard when no suggested site exists. (DM)
- Fixed issue with the Controlled Documents Viewer not loading in SP2013. (DM)
- Fixed issue with the following tab in the Create Document wizard. (DM)
- Fixed issue with some special characters messing up content in a DOCX document when published. (DM)
- Fixed some problems with the upload document dialog in IE11. (DM)
- Performance improvements in the Drafts and Published view in the Controlled Documents Library. (DM)
- Fixed problem opening appendix from appendices dialog. (DM)
- Fixed issue with the “Convert to PDF” mandatory setting not being mandatory anymore. (DM)
- If a document did not have any custom properties, the title and file name were hidden in the properties dialog. This has now been fixed. (DM)
- Performance improvements on the statistics number in Omnia Admin. (DM)
- Fixed issue with default properties not showing up for uploaded documents. (DM)
- Fixed some issues with the term picker in document properties when having many terms selected. (DM)

- Made it possible to provision sites based on the Project Site base template with Document Management. (DM)
- Fixed the logic of the notifications in the Document Subscription block. (DM)

Release Notes March 2019 Patch 1

Omnia.Foundation (1.0.15754)

- Fixed issue with long term names in term picker.
- Fixed problem with access tokens in onprem environments.
- Fixed issue with modified date in My Recent Documents being displayed wrongly for PDF files.
- Fixed some issue with the new Quill editor and alignment.

Omnia.Intranet (1.0.15734)

- Fixed issue related to the Follow API onprem.
- Fixed issue with links/comments not being displayed in News Viewer in certain scenarios.
- Fixed issue with Navigation Sync Job throwing errors in the log.
- Fixed issue with adding Banner block to a classic web part page.
- Fixed issue in People rollup with duplicate search refiners that could appear in certain scenarios.
- Fixed issue with icon colors in Aggregated Calendar.
- Fixed an issue when moving a page in Manage Content to another publishing site.
- Fixed issue with the Master Page feature throwing errors in certain scenarios when the Title field could not be set.
- Fixed issue with the Aggregated Calendar rendered grayed out in certain scenarios.
- Fixed problem with adding new Enterprise Keywords in Manage Content.
- Fixed issue with likes/comments not showing up in certain scenarios in the News Viewer.
- Fixed problem with Swedish text not being shown completely in the Action Menu.
- Fixed problem with message appearing for some customers that they need to activate the site feed in their publishing site.
- Fixed issue with page freezing in edit mode if you add a custom video script in the editor.
- Fixed on-prem problem in the people rollup that could happen for certain search queries.
- Fixed on-prem issue with the link to comments in the notification e-mail.
- Fixed issue with header title not being shown for a Document Rollup block if refiners are added on top.
- Fixed problem with moving custom links in Manage Content.
- Fixed issue with duplicate events being shown in the Aggregated Calendar when using repeated events.
- Fixed issue with wrong time being shown in Aggregated Calendar in certain scenarios.
- Fixed a number of small issues in the Aggregated Calendar.
- Fixed some design issue in the My Tasks block.
- Fixed some issues with targeting in the Aggregated Calendar.

- Fixed issues showing events in the Aggregated Calendar on a modern team site.
- Fixed time zone issue with time stamp when editing a page.
- Fixed issue with the Date Picker in Safari browsers.

Omnia.DocumentManagement (1.0.15959)

- Fixed issue with required fields on publishing in IE11.
- Fixed issue related to saving term based approvers on a Document Type.
- Fixed issue with too high permissions required to update the settings on the Controlled Documents Library in a team site.
- Fixed problem with searching on specific terms in the bulk update UI in Omnia Admin.
- Made sure that the PDF folder in the drafts library is ensured if removed by mistake.
- Prevent updates of documents in the bulk update UI that has a draft version.
- Fixed an issue with the placeholder ODMApprovedBy not being updated correctly in the header of a document.
- Fixed issue with a special character in the metadata merge in DOCX.
- Fixed problem with search refiners in the Controlled Documents Viewer in SharePoint 2013 environments.

1.10.8 Release Notes November 2018

Features

Yammer Integration

From this release, it is possible to use Yammer as the preferred choice for conversations in an Office 365 Group site template.

☐ Site Collection ☐ Sub Site ☒ Office 365 Group

General

Settings

Features

Properties

Permission Level

☒ Self Service
☐ Approval

Template Group

Intranet

Display To

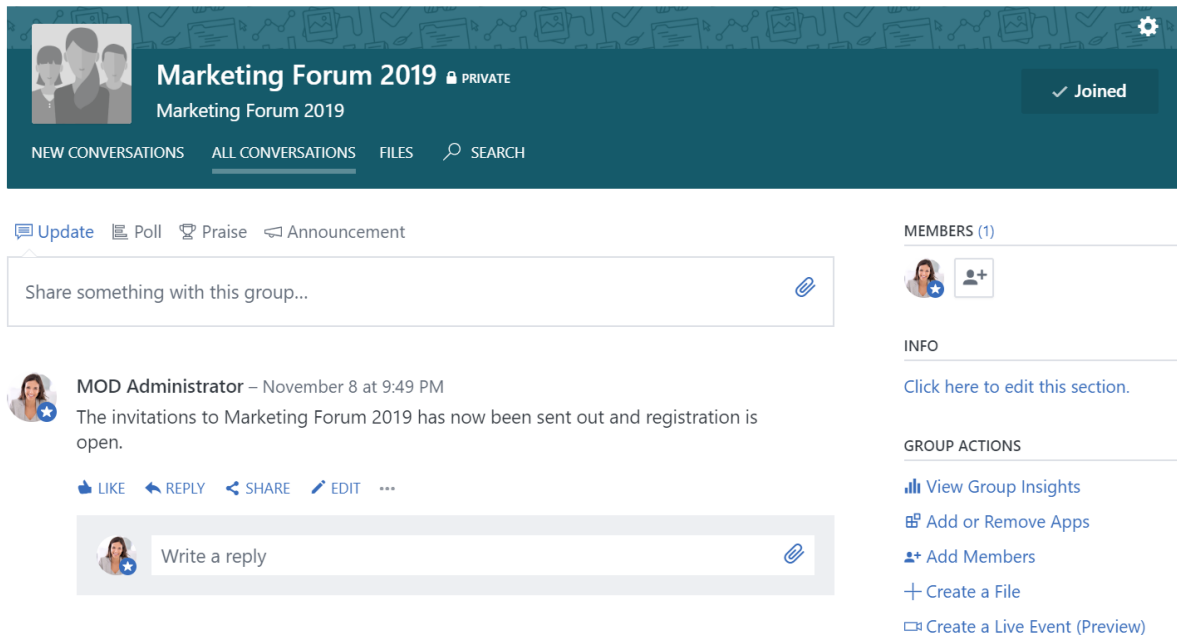
Conversations

☐ Legacy Site Feed ☐ Teams ☒ Yammer

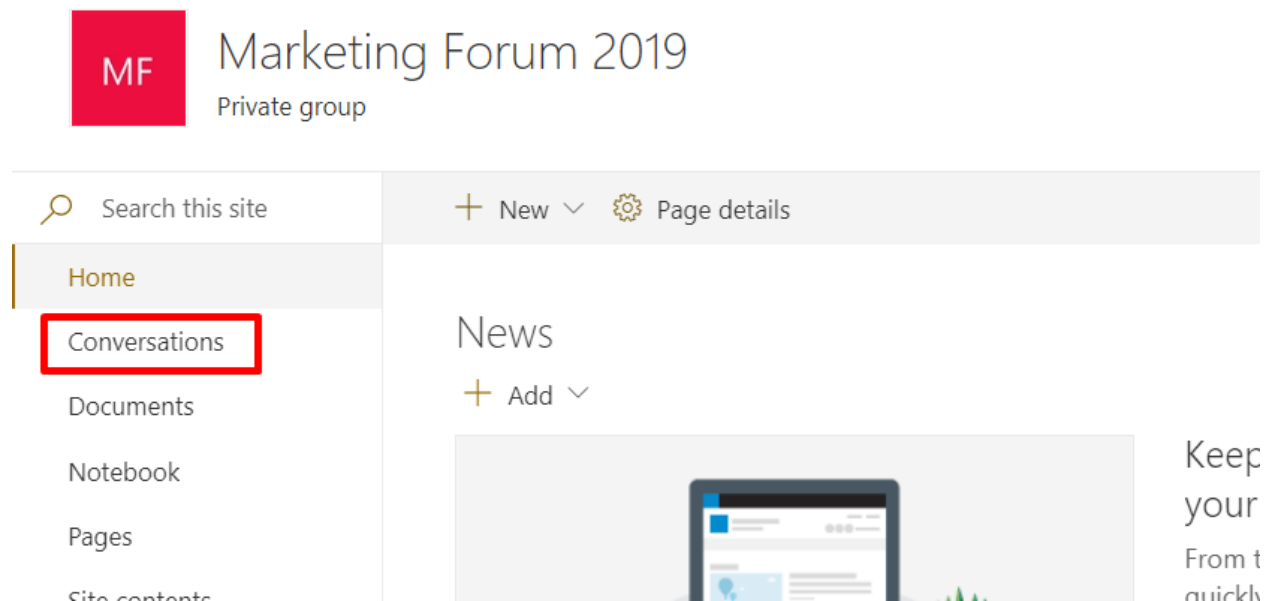
Privacy

Private - Only approved members can see what's inside

When this option is selected, a Yammer group will be created in the provisioning flow. The Yammer group will be automatically connected to a new Office 365 Group and team site.



The conversations link in Quick Launch will take you to the connected Yammer group.



In order for Yammer group provisioning to be enabled in the solution, the following steps need to be carried out:

1. Make sure Azure Services is enabled in Omnia Admin.
2. Login to Yammer with a Network Admin account. (This account will be used by Omnia to provision new Yammer groups.)
3. Go to Settings > Apps and register a new app.

Register new App



All fields are required.

Application Name ?

Organization ?

Support e-mail ?

Website ?

Redirect URI ?



By checking this box, you agree that you have read and agree to the [Yammer API Terms of Service](#).

4. Note down the Client Id and Client Secret.
5. Browse to [https://www.yammer.com/oauth2/authorize?client_id={\[\]ClientId\[\]}&response_type=code&redirect_uri=https://www.yammer.com](https://www.yammer.com/oauth2/authorize?client_id={[]ClientId[]}&response_type=code&redirect_uri=https://www.yammer.com)
6. Click on Allow to authorize the app.
7. Copy the Code in the url in the page you get redirected to. (Something like: lirOpPqZXwjTpRXx4ctDA)
8. Browse to [https://www.yammer.com/oauth2/access_token.json?client_id={\[\]ClientId\[\]}&client_secret={\[\]ClientSecret\[\]}&code={\[\]Code\[\]}](https://www.yammer.com/oauth2/access_token.json?client_id={[]ClientId[]}&client_secret={[]ClientSecret[]}&code={[]Code[]})
9. Note down the token you receive from the JSON response. (Something like: 11503671-bAjUZJODAYrXENINKJNA)
10. Go to Omnia Admin > Settings > Azure AD > Yammer Group.
11. Read the prerequisites text and make sure your Yammer network is configured accordingly.

12. Put the token into the Yammer Access Token field.
 13. Check the box “I ensure all prerequisites are configured correctly” and save.
- Site templates can now use Yammer as its preferred way of handling conversations within a group.

Legacy Site Feed for Modern Sites

The User Feed block in Omnia has been updated to support the legacy SharePoint Site Feed in Modern Pages.

☐ Site Collection
 ☐ Sub Site
 ☒ Office 365 Group

[General](#)
[Settings](#)
[Features](#)
[Properties](#)

Permission Level
☒ Self Service
 ☐ Approval

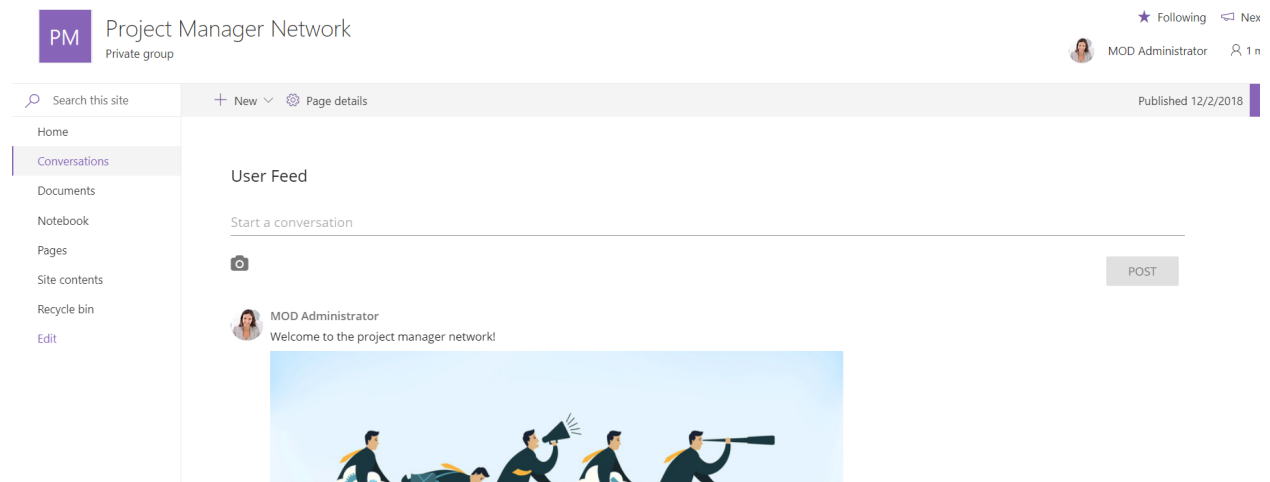
Template Group

Display To

Conversations
☒ Legacy Site Feed
 ☐ Teams
 ☒ Yammer

Privacy

The conversations link in quick launch will take you to a modern page with the user feed block on configured as a Site Feed.



New Media Picker

The new Media Picker can be enabled/disabled in Omnia Admin. Go to Settings > Intranet Core and change the setting “Use New Media Picker”.

System » Settings » Intranet Core

Caching Search Result Type

Intranet Core Settings

Name	Value	
Disable e-mail notifications on comments	False	Save
Localization Languages (separated by semicolon)	en-US	Save
Media Picker Max File Size (KB)	3072	Save
Use New Media Picker	True	Save

In the November release, the new Media Picker is implemented when picking a Page Image on a web page.

Our Milestones
Adventrix Gallery
History and Heritage
Where are we heading?
Our Look and Feel
Our Locations
How we work
Our Products
Employee Employment
Employee Directory
Document Center

Adventrix Gallery

Summary

Move around the gallery and look at our products in 3D.

☐
Enable legacy web parts

Image

/sites/intra/Pages/adventrix-gallery/Free-photo-Museum-Gallery-Art-Pai
Browse

The new Media Picker supports the possibility to paste on image from the clipboard or browse your local computer.

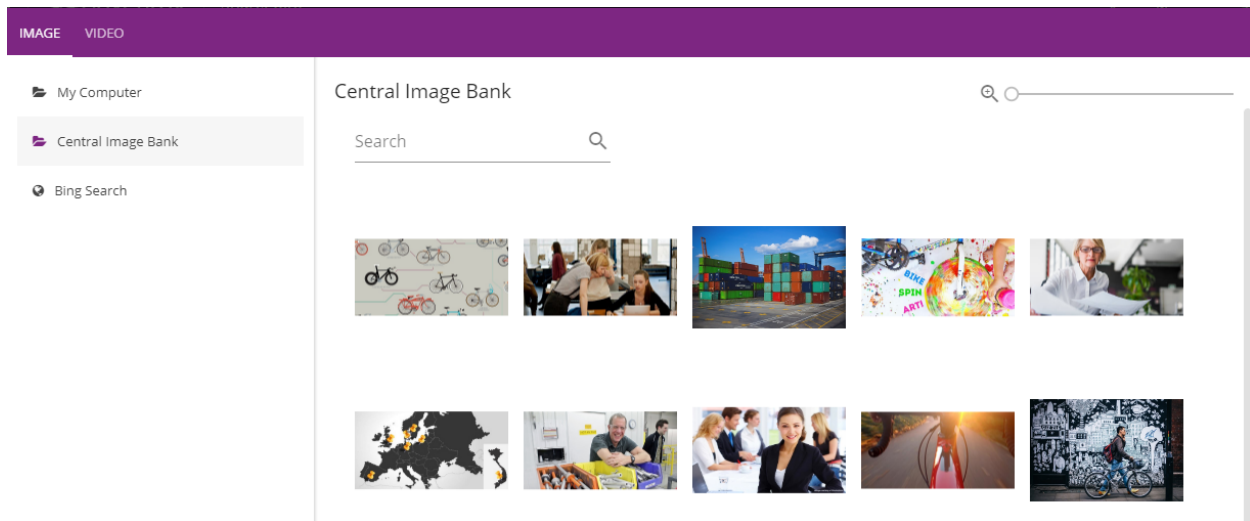
IMAGE VIDEO

My Computer
Central Image Bank
Bing Search

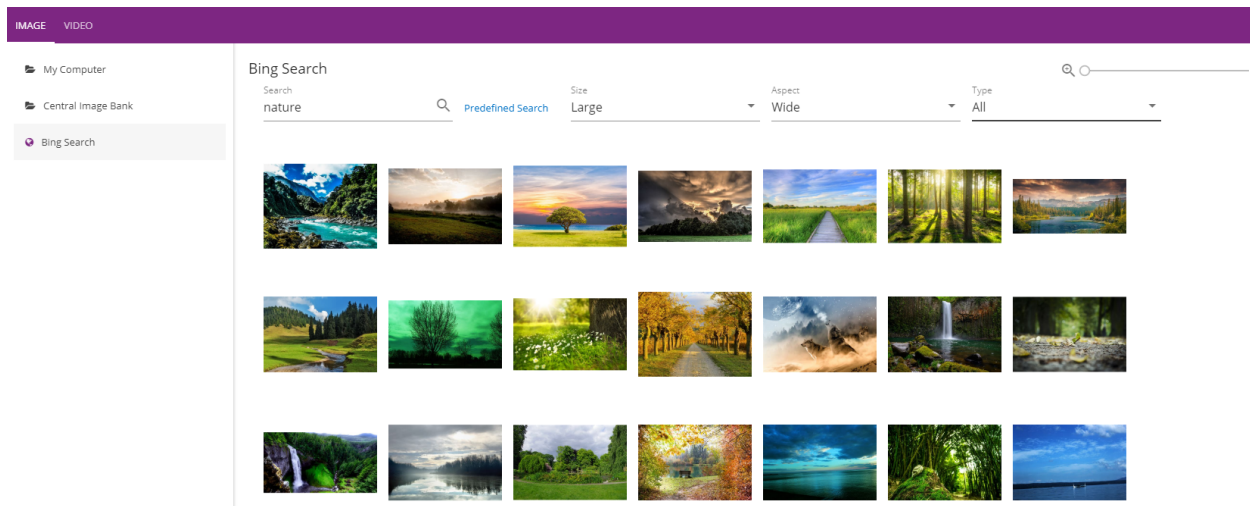
My Computer

Paste your image here, drop a file or [Browse](#) to upload.

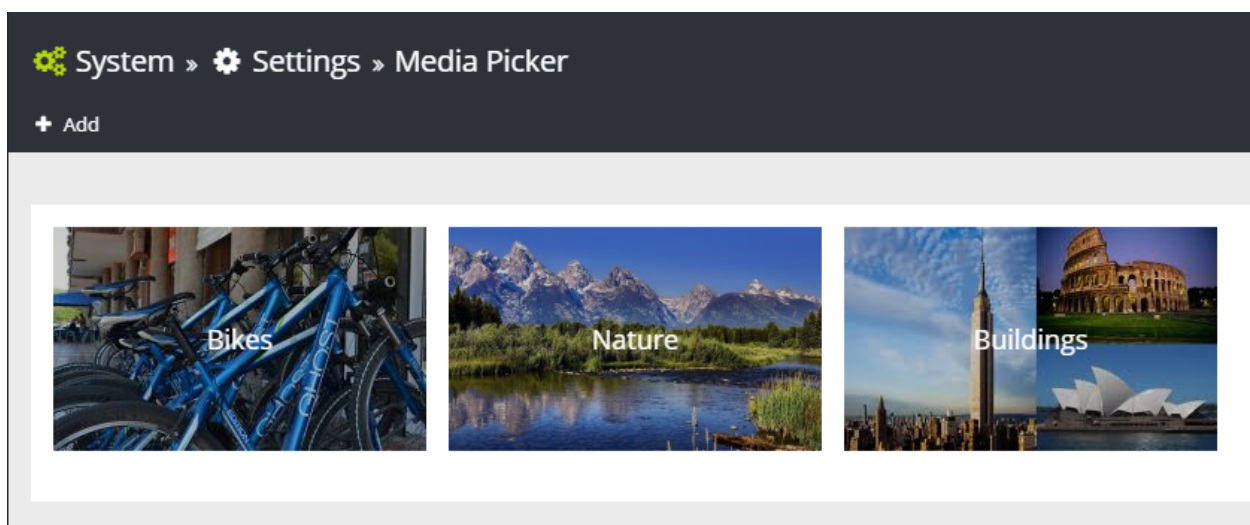
You can also find images from any existing central image location you have registered in Omnia Admin.

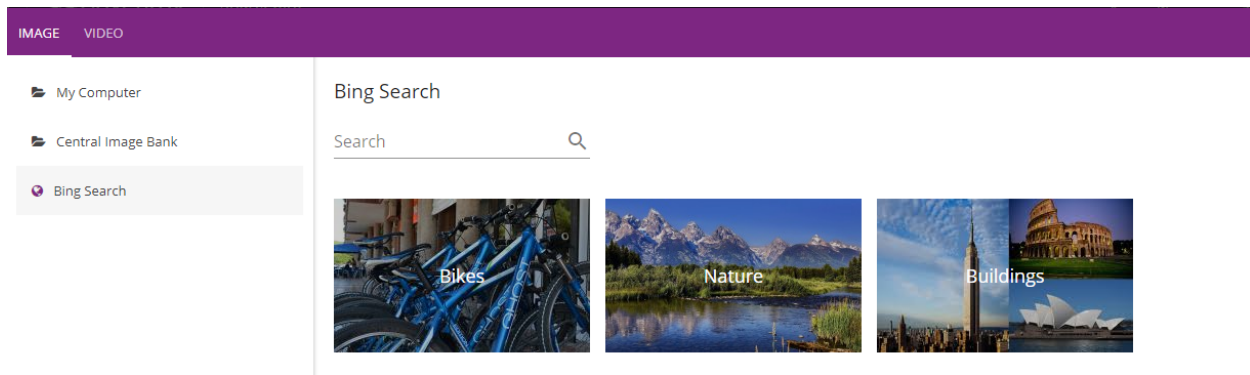


There is also a possibility to use Bing to search for images. When you search for images in Bing using the Media Picker, it only shows images that are free to use and share.

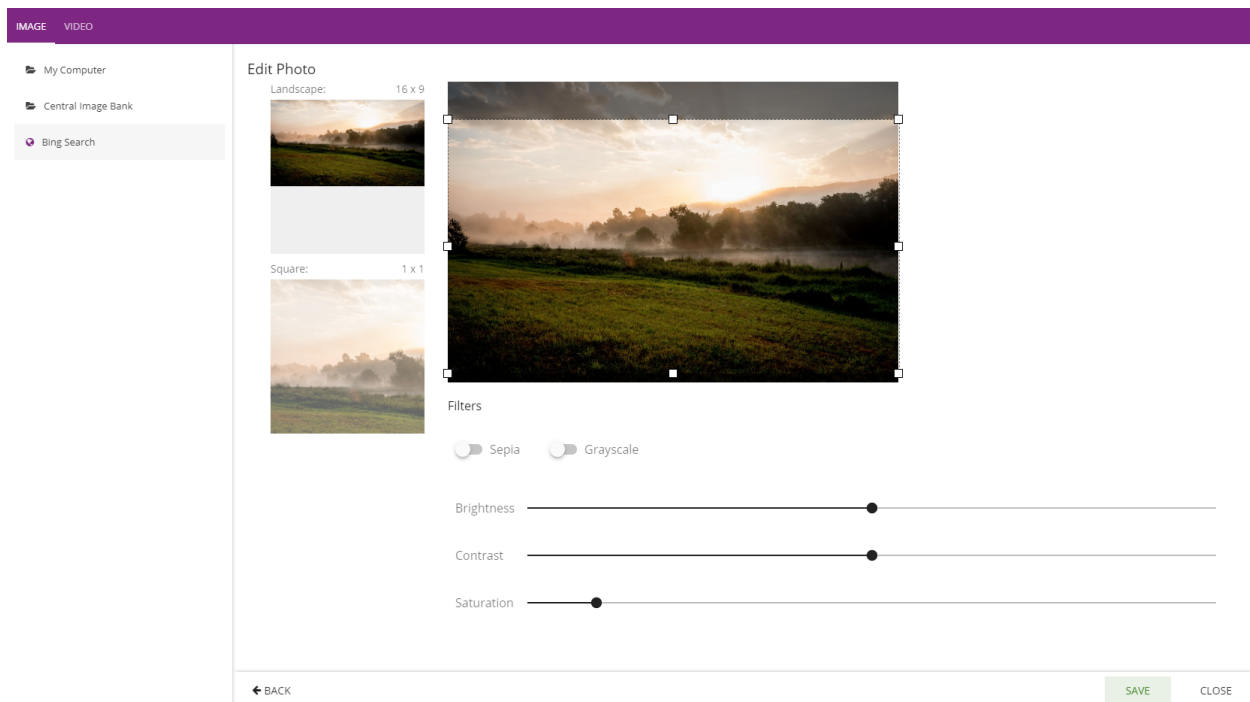


As an administrator, it is possible to setup predefined Bing search categories for the Media Picker to use.

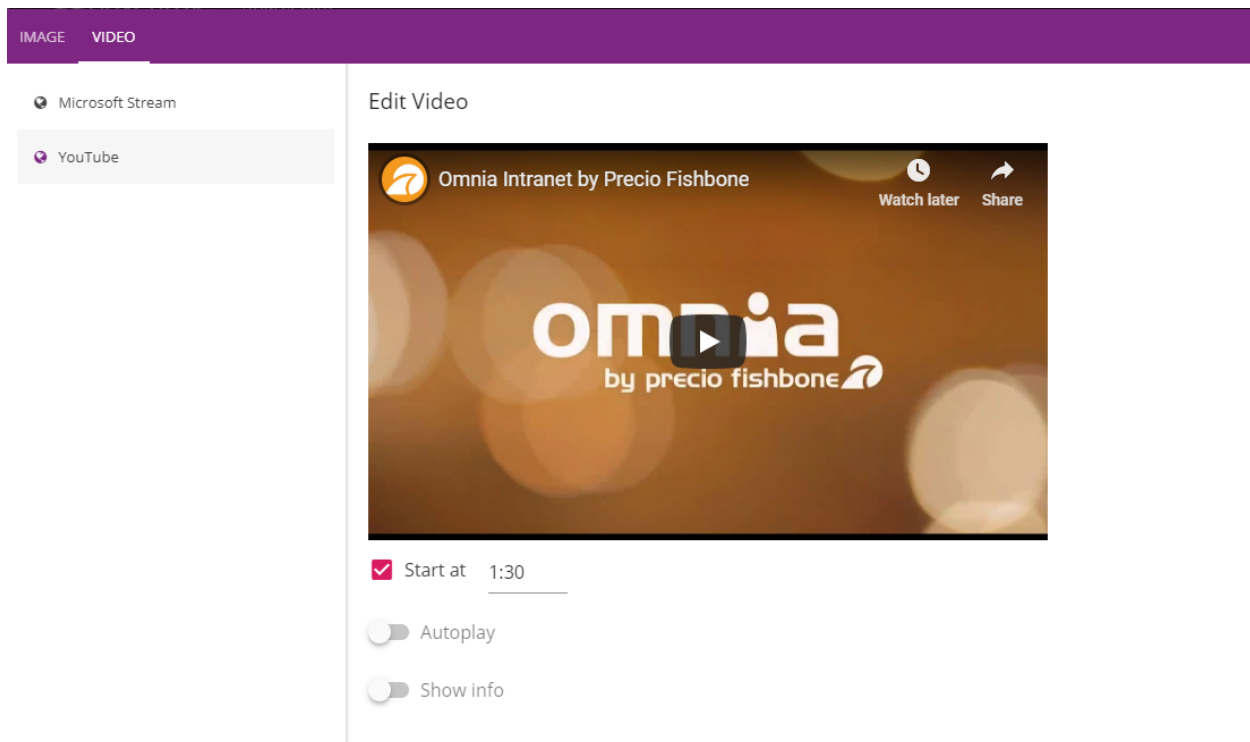




Once an image has been selected, it is possible to apply a filter and change different ratios of the image.



It is possible to select a Video to replace the image on the top of a web page. The Media Picker support Stream and YouTube by default.

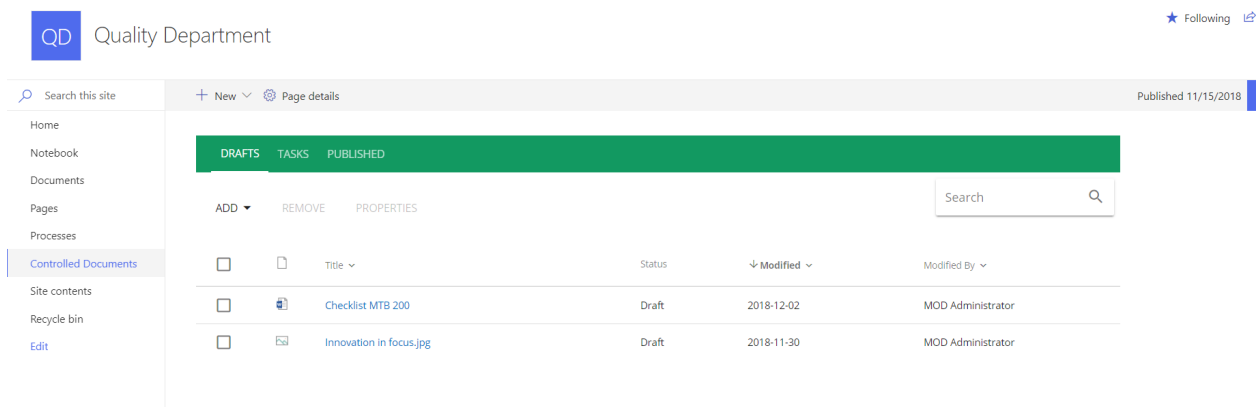


All news rollups that display page images have been updated to support the new Media Picker. The news rollups are backward compatible to support the previous Image Picker. The SharePoint Image Renditions for landscape have been updated to a 16:9 ratio. The new values are:

- 1001 Landscape: 640px * 360px.
- 1004 Landscape (small size): 320px * 180px.
- 1005 Landscape (New): 640px * 360px.

Document Management for Modern Sites (Document Management)

Document Management is now fully supported in Modern Sites.

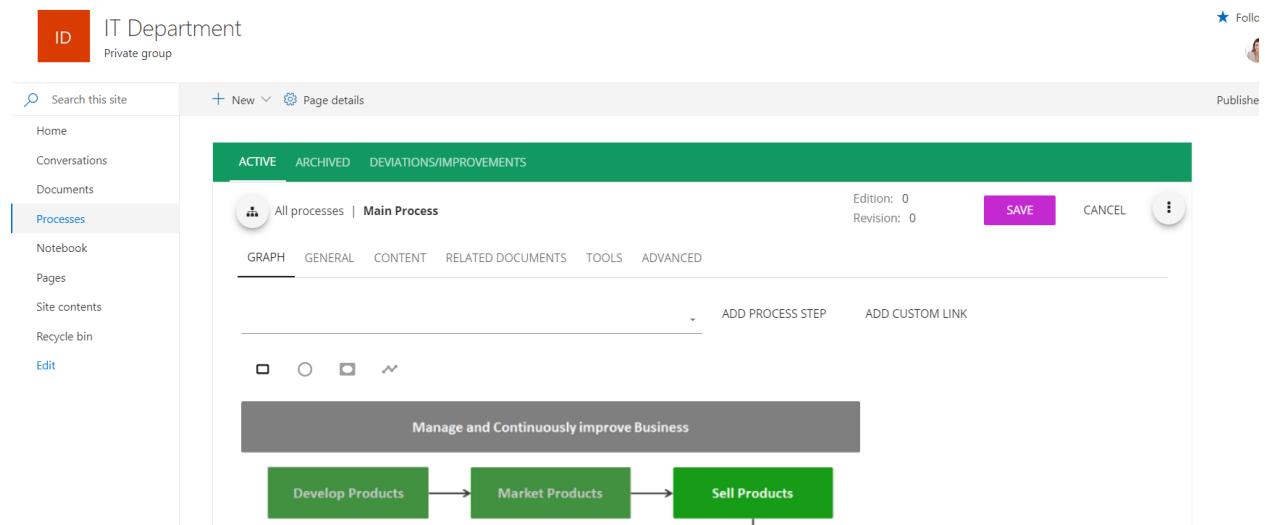


If the Omnia SPFx Infrastructure feature is activated on a team site, the Controlled Documents library will be deployed as a modern page.

All existing Document Management sites will be updated to use the new look and feel.

Quality Management for Modern Sites (Quality Management)

Quality Management is now fully supported in Modern Sites.



If the Omnia SPFx Infrastructure feature is activated on a team site, the Process library will be deployed as a modern page.

All existing Quality Management sites will be updated to use the new look and feel.

Bug Fixes and Small Improvements

- All blocks can now have a title. It is possible to decide whether a title should be shown or not using a checkbox.
- All block titles can have custom localization. Use the syntax {en-us:My Title;sv-se:Mina rubrik}.
- Fixed bug in Edit Reusable Banner that could happen in some scenarios.
- Fixed issue with new Date/Time picker when loading a specific type of dialog for the first time (related to new version of QMS).
- Fixed some issue with the aspect ratio in the News Roller.

Release Notes November 2018 Patch 1

Omnia.Foundation (1.0.14988)

- Fixed a couple of issues with the Term Picker.
- Fixed issue with validation in People Picker.
- Fixed issue with targeting in RSS Viewer for translated labels.
- Fixed problem with text boxes in settings not being able to be edited in IE11.
- Fixed label that could not be translated correctly in the Media Picker.
- Fixed component omfx-scroll.
- Fixed issue with the Team Site quick edit when browsing from one modern team site to another.

- Fixed issues related to SharePoint 2019.
- Added support for Canadian French language.
- Made sure extensions can use their own version of CSOM.
- Secured the site provisioning flow when the SharePoint API is not responding as expected.
- Removed information logs from the Term Picker.

Omnia.Intranet (1.0.14980)

- Fixed a number of issues related to the Aggregated Calendar.
- Fixed issue with the User Feed for customers running in Site Collection Only Mode.
- Fixed issue with Scheduled Publishing if a file is checked out.
- Fixed some missing Swedish translation in the Media Picker.
- Fixed a number of design issues in the new Media Picker.
- Fixed issue in Document Rollup when using Less than query.
- Fixed issue related to HTML being displayed as plain text in the Strengthen Profile dialog.
- Fixed issues with read-only fields in the Strengthen Profile dialog.
- Added validation to the feedback in the Strengthen Profile dialog so that empty feedback cannot be sent.
- It is now possible to activate the “Omnia Team Site - Prerequisites” feature on a Communication Site.
- Fixed design issue in the User Feed. The profile picture was cut off in replies.
- Fixed issue with posting in the User Feed on Edge and IE11.
- Fixed problem with the “Open Page” button on news articles always redirecting to the legacy SharePoint version of the page instead of the quick page.
- Fixed problem with images in the Rich Text Editor always having a fixed width and height.
- Fixed graphical bug in Edge in one of the News Viewer views.
- Change margin between title and result in News Viewer if title is used on the block.
- Made sure the People Rollup block doesn’t throw an error for external users.
- Fixed issue with comment in user feed not being able to be deleted in Modern Team Sites on certain browsers.
- An Accessibility Theme has been added to Omnia Admin that can be turned on by an end user to allow for better contrast.
- Accessibility has been improved on all controls.
- The Omnia Admin link is now available for all users.
- Fixed graphical bug in the last updated documents block.
- Made sure that pages that are set to be hidden in the current navigation does not show up in the mobile navigation either.
- Fixed issue with profile images being stretched in Quick Search.
- Fixed issue with special characters in comments on important announcements.
- Added image title in the search result in the new Media Picker when hover an image.
- Fixed so that the Related Links block doesn’t take up any space if empty.

- Made sure it is possible to set the sort order of refiners in the People Rollup.
- Fixed issue that it was not possible to add a term to an open term set if no terms exists.
- Improved the RSS Reader block to support more types of RSS feeds.
- Fixed icon for DOCM documents in the Document Rollup block.
- Fixed look and feel of the Site Directory on an Android phone.
- Fixed issue with not being able to edit the Controlled Documents Viewer settings on a classic web part page.
- Fixed issue with checkboxes in iPad landscape mode.
- Fixed issue with Site Contents link always going to the root even if on a sub publishing site.
- Fixed problem with share feature in IE11 and Edge.
- Fixed issue with comments and likes not showing on a page if user that made a comment is deleted.
- Fixed some style issues in the Site Directory.
- Fixed problem with the My Links block changing sort order when the My Links navigation is used in the header.
- Made it possible to have Lotus Notes links in Related Links on a page.
- Fixed rare issue that the title on the page could end up over the page image.
- Fixed word wrap issue in the People Rollup block.
- Fixed issue with Important Announcements in the notification panel not rendering HTML text correctly.
- Fixed issue with Date Pickers in the news center on certain sites.
- Fixed missing space character in Swedish upload text in the Media Picker.
- Fixed issue with the Advanced Search button disappearing in Quick Search when you navigate between pages.
- Fixed design issue in News Viewer when comments and likes were missing on an article.
- Fixed design issue with paging control in News Center if only one new article exists.
- Fixed design issue in certain dialogs in IE11. Icons from the header was shown above the dialog.
- Fixed issue in IE11 in the actions menu when words wrap.
- Made sure column settings in the People Rollup block fall back to default language if translation does not exist.
- Fixed issues related to moving pages in Manage Content from one sub site to another.
- Fixed stretch profile images People Rollup and Page Properties blocks.
- Fixed critical issue with Followed Sites in My Sites navigation and Last Updated Documents caused by an update by Microsoft in SharePoint Online.

Omnia.DocumentManagement (1.0.14997)

- All dependencies to Angular 1 have been removed. Document Management is no longer dependent on the feature “Omnia Angular1 Support” being activated.
- Fixed issue with a certain status on a controlled document in the Drafts view making it stuck when loading the view.
- Fixed issue with the following tab in the Create Document wizard not showing all followed sites.
- Fixed issue that certain term sets did not showing children in the Create Document Wizard.
- Fixed issue with the Controlled Documents Library filters on newly created sites.

- Fixed problem with the links in the statistics report in Omnia pointing to the wrong url's.
- Fixed issue showing many related controlled documents in the process viewer.
- Fixed issue with missing sub term in termset in filters.
- Fixed issue with tasks in My Tasks not redirecting to the correct view.
- Fixed issue with HTML in custom localizations not being rendered as expected.
- Performance improvements when getting Document Types.
- Fixed issue with buttons in Controlled Documents Library not being displayed correctly in some environments.
- Ensured the Edition property is shown again in the Properties dialog.
- Made sure HTML was rendered correctly for custom localization texts.

Omnia.QMS (1.0.14859)

- Fixed issue with loading linked process using direct url.
- Fixed issue with custom process image showing wrong cursor icon on hover.

Release Notes November 2018 Patch 2

Omnia.Foundation (1.0.15124)

- Fixed CSS issues related to the rollout of a new header in SharePoint Online.
- Fixed issue with autorenewing Azure AD token in Angular 1 code.
- Modifications to the provisioning of Office 365 Groups to make it more stable.
- Add French translation to tinymce.

Omnia.Intranet (1.0.15144)

- Fixed issue with PNG image not being displayed correctly in IE11 when using the new Media Picker.
- Fixed issue with images in publishing sites using approval not being shown to users when using the new Media Picker.
- Fixed issue with settings icon not being shown on blocks in classic web part pages when using the new modern header in Omnia.

Omnia.DocumentManagement (1.0.15041)

- Fixed issue editing properties of certain PDF documents in the drafts library.
- Fixed issue with certain terms not being able to be filtered on in the Controlled Documents Viewer.
- Fixed issue with certain special characters being corrupt when publishing a document.
- Fixed error that could occur if document with broken read rights was published a second time.
- Fixed issue with the action menu not appearing for draft documents in certain sites.

- Fixed issue with settings icon not appearing as expected for the Controlled Documents Viewer in certain scenarios.
- Fixed issue with some documents not being able to be moved to another site.
- Fixed issue with the edit columns settings dialog showing all columns unchecked in modern sites.

Omnia.QMS (1.0.15137)

- Fixed issue when navigating from a quick page with Process Viewer to another quick page.
- Fixed issue with certain custom process images being rendered too big.
- Fixed issue with special characters in Tools tab.

Release Notes November 2018 Patch 3

Omnia.Foundation (1.0.15265)

- Fixed provisioning issue related to a change in the Teams API.
- Fixed timing issue in provisioning process of Office 365 Groups.
- Fixed issue with Media Picker in IE11. Pictures uploaded from the local computer where using incorrect file extensions.

Omnia.DocumentManagement (1.0.15335)

- Fixed issue with document being stuck in publishing in certain scenarios.
- Fixed issue with new documents being uploaded when creating a draft not working in sub sites.
- Fixed some issues when ensuring site columns for sub sites.
- Fixed issue with the Document Subscription block being really slow when updating settings.
- Documents in the Related Documents Dialog in the Controlled Documents Viewer are now linked to the actual documents.
- Fixed issue with folders not being correctly loaded in the New Document Wizard for some team sites.
- Made sure hidden properties do not show up in the properties dialog on published documents.

Omnia.QMS (1.0.15340)

- Fixed issue with custom images sometimes being stored in the wrong library.
- Fixed issue with publish button not being shown in IE11 in certain scenarios.
- Fixed issue with icons don't matching the file extension in Tools.

1.10.9 Release Notes September 2018

Features

User Profile Completion Wizard

The purpose of the User Profile Completion Wizard is to make it easier for the user to fill in their user profile.

Education


Please share which training and certificates you have

✓


General
General settings like name, picture and e-mail


2

Education

Training 

Certifications

Office 365 



UPDATE SKIP

3

Skills
Share your skills and let your colleagues find you

✓


News Subscription
Fill in your preferred areas of interest to get the most relevant news for you





69% done

CLOSE



An administrator can design the User Profile Completion Wizard according to needs...

 **User Profiles**

 Property Mappings  Permissions

Settings

Show Dialog
☐ Daily
☒ Weekly
☐ Monthly Every week(s)
☐ Sunday ☒ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday ☐ Friday ☐ Saturday

Start date
  ☒ No end date
☐ End by 

Localization

Title

Description

Feedback Address

Levels

#390000

>

%

#fff000

>

#03833c

>

%

Save

... and map properties from the SharePoint User Profiles that are of interest.

User Profiles » Property Mappings

Property Mappings

+ Add Section

General

Education

Skills

News Subscription

General

Property Mappings

Localization
en-US

Name
Education

Description
Please share which training and certificates you have

Save Cancel

User Profiles » Property Mappings

Property Mappings

+ Add Section

General

Education

Skills

News Subscription

General

Property Mappings

+ Add Mapping

ADXCompTraining

ADXCompCertifications

Save Cancel

Property Mapping ×

Property
ADXCompTraining ▼

Type
Term Set ▼

Localization
en-US ▼

Label
Training

Completeness Impact
Medium ▼

Term Group
AdventrixGroup ▼

Term Set
Training ▼

Create New Term Set

☒ **Multiple**

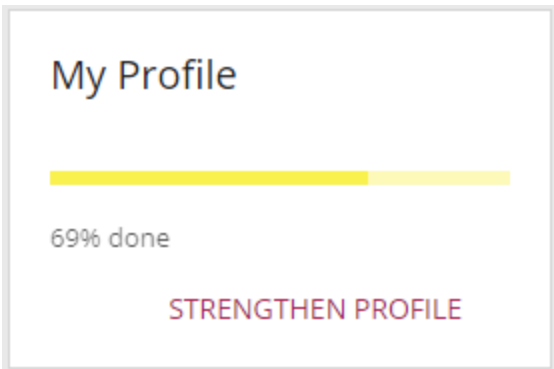
☐ **Read only**

☐ **Allow feedback**

Ok

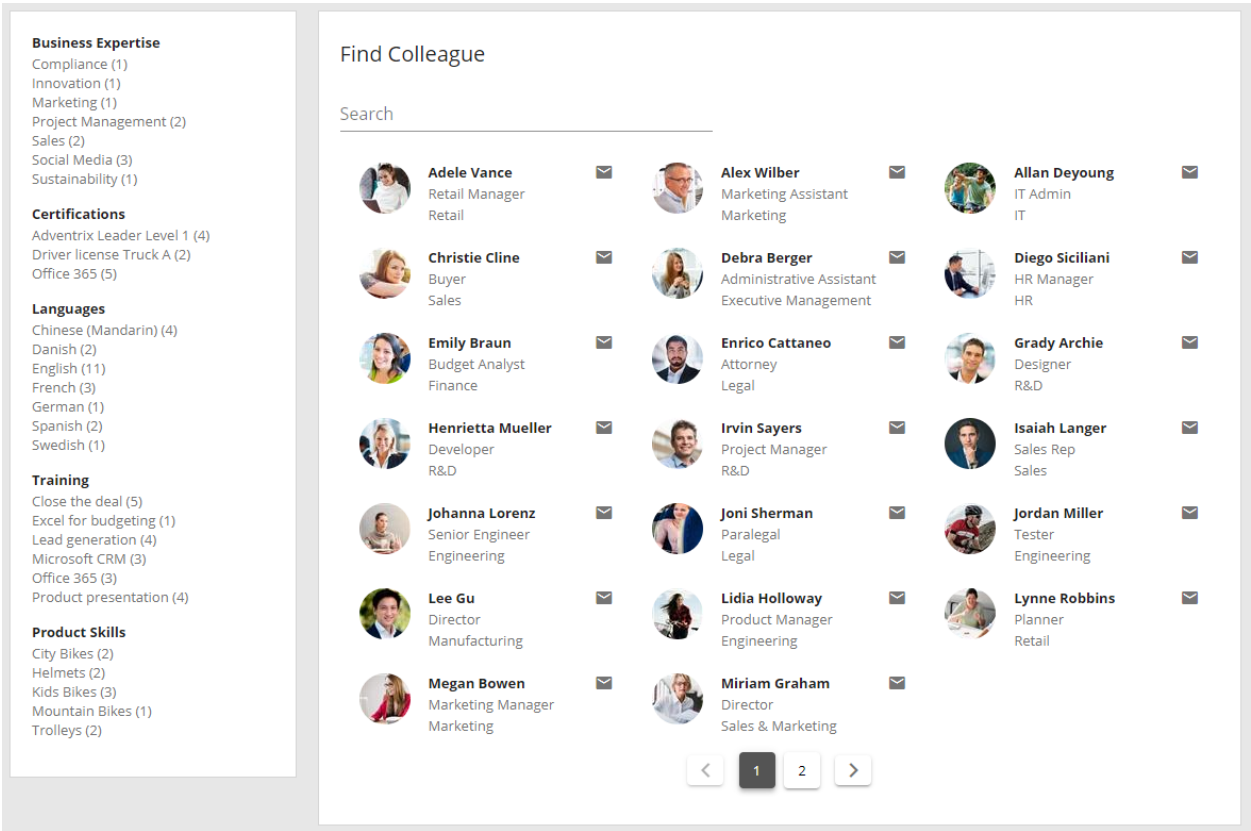
Cancel

There is also a block that can be put on a page that will display the current user profile completeness of the signed in user.



Refiners and Multi-column in People Rollup

The People Rollup block has been enhanced to allow for multi-column view and search refiners which makes it possible to be used as a people directory.



Planner Tasks in My Tasks

A prerequisite for the Planner Tasks integration to work is to *enable Azure AD Services* in Omnia. When Azure AD Services is enabled, the My Tasks block can be configured to show tasks from SharePoint and Planner.

My Tasks Settings



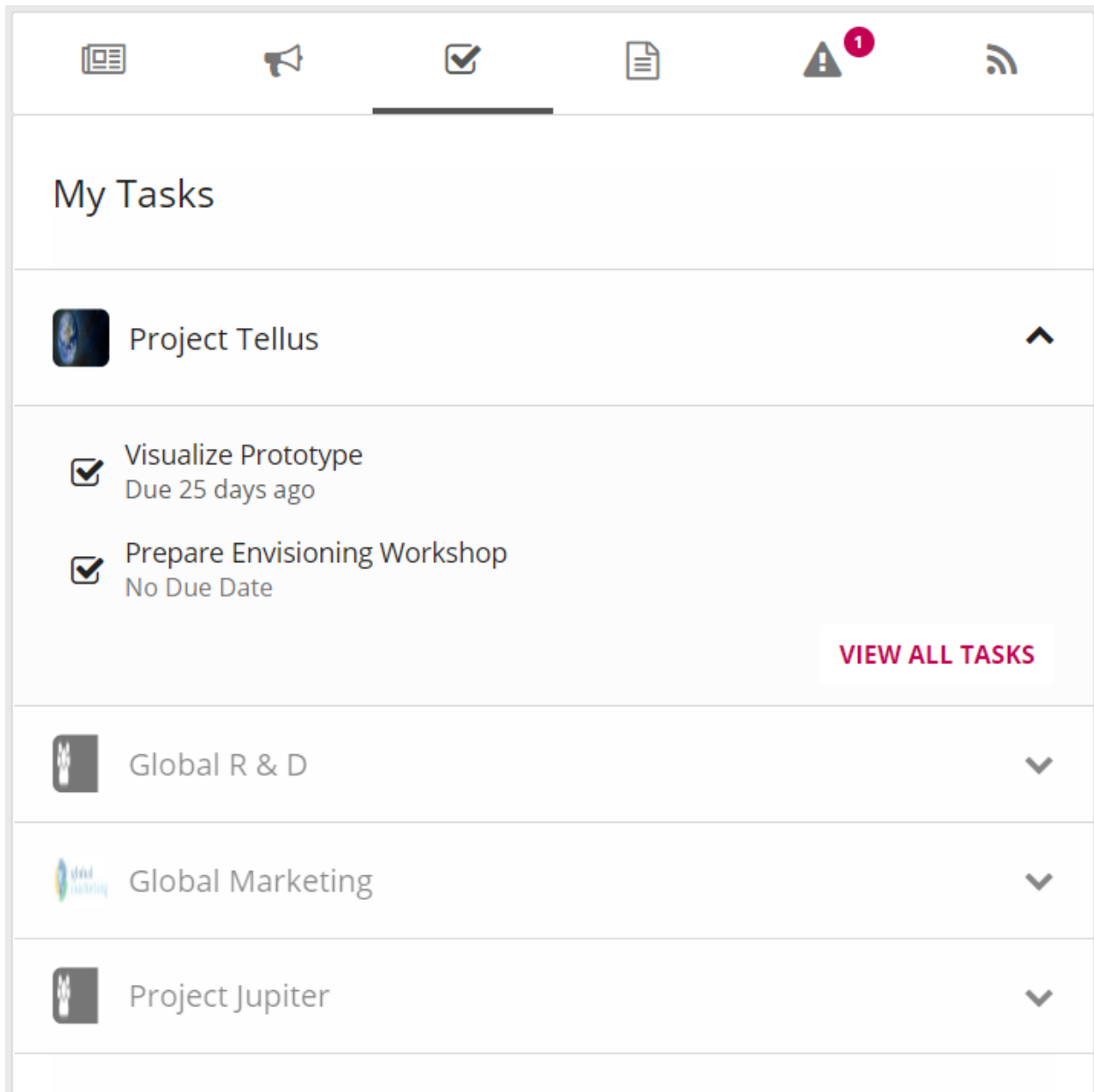
GENERAL

CUSTOM COLORS

PLANNER TASKS



Enable Planner Task



Provision Microsoft Teams

A prerequisite for the Microsoft Teams integration to work is to *enable Azure AD Services* in Omnia.

When Azure AD Services is enabled, a Site Template can be configured to create a Microsoft Team together with the creation of the Office 365 Group.

Site Templates » Edit Site Template

Edit Site Template

Site Collection

Sub Site

Office 365 Group

General

Settings

Features

Properties

Permission Level

Self Service

Approval

Template Group

Intranet

Display To

Default Member

Conversations

Outlook

Teams

Yammer

Privacy

Private - Only approved members can see what's inside

Default Time Zone

(UTC+01:00) Amsterdam, Berlin, Bern, Rome, Stockholm, Vienna

User can change privacy

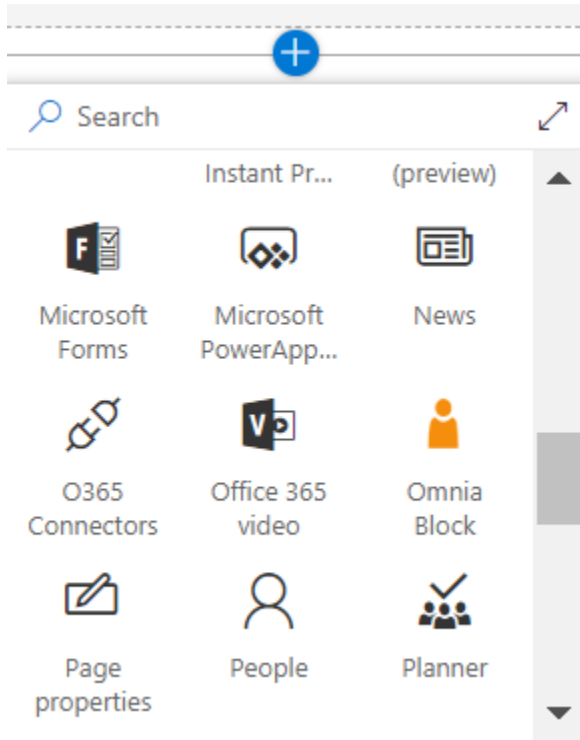
☒

Save

Cancel

Modern Web Part for Omnia Blocks

The blocks in Omnia have been redesign with a modern look and feel and are now available on modern pages via a modern web part called “Omnia Block”.



A prerequisite for Omnia to work in modern pages is that Omnia SPFx Integration is enabled. Please find out how to do that [here](#)

Bug Fixes and Small Improvements

- The product documentation and release notes now open up in a new tab from Omnia Admin.
- Color Picker has been fixed to show all colors without scrollbar if possible.
- The performance of the Term picker has been fixed to allow for very large term sets on a single level in the tree.
- Fixed a limitation in Personal Links where it was not possible to add two links with same icon color in the same session.
- Fixed the mobile navigation in the modern header to allow for deep navigation structures.
- Fixed issue in IE 11 with modal dialogs not working as expected.
- Fixed inconsistency in how dates were displayed when editing important announcements.
- Aligned the look and feel of action links in Omnia blocks.
- Fixed issue with web statistics not being displayed correctly for customers running in site collection only mode.
- Fixed issue with links to Lotus Notes not working in My Links.
- Localization UI in Omnia Admin has been changed to collapsed nodes by default to enhance performance.
- Fixed issue with showing number fields in Page Properties.
- Fixed small issue with mega menu that affected a couple of customers.
- Fixed Aggregated Calendar localization issue.

Release Notes September 2018 Patch 1

Omnia.Foundation (1.0.13546)

- Fixed general issues with Omnia Fx in certain versions of Edge and IE11.
- Fixed problem with provisioning Office 365 groups using site request approval.
- Fixed problem with localization in certain part of the UX (showing English instead of local language).

Omnia.Intranet (1.0.13549)

- Fixed issue with too many tags showing up in certain views in the News Viewer.
- Fixed problem in quick search reloading blank page when clicking enter in the search box.
- Fixed issue with comments of Important Announcements not being able to be deleted in IE11.
- Fixed issue with filter properties in Site Directory being stacked upon each other instead of side-by-side.
- Fixed aggregated calendar issues in IE11.
- Fixed issues with User Profile Completeness UX in iOS.

Omnia.DocumentManagement (1.0.13513)

- Fixed issue with read receipt not being cleared when a controlled document is rejected.
- Fixed reorder of Document Templates in Omnia Admin.
- Fixed error in the Properties form that could happen in very specific scenarios.
- Made it possible again to publish .svg files.
- Fixed inaccurate Swedish translations.

Omnia.QMS (1.0.13538)

- Fixed wrong Process Owner in PDF Export.
- Fixed issue with UX getting stuck sometimes when saving a process.
- Fixed inaccurate Swedish translations.
- Fixed issue with non-approved relations to documents showing up as related.
- Fixed error in Map Process that could happen in very specific scenarios.

Release Notes September 2018 Patch 2

Omnia.Foundation (1.0.13674)

- Fixed the problem that certain CSS styles in Vuetify spilled over into classic SharePoint.
- Fixed missing localization label for the Close button in the Strengthen Profile block.
- Fixed issues with the Strengthen Profile UI on mobile devices.

- Fixed problem with missing js file for German localization.
- Fixed issue with missing values for Person fields in Site Request form.
- Fixed some general localization problems with the new modern blocks.

Omnia.Intranet (1.0.13697)

- If central naming policies are applied to Office 365 Groups, the create site wizard will raise a warning if the name of the new site does not align with the policies. (In a coming release, the create site UI will help the user to be compliant with the policies).
- Fixed issue with german localization in Aggregated Calendar.
- Added a possibility for web authors to see which status the page is in (draft, published, waiting for approval). If the page is not published, an info icon will be shown next to the Quick Edit button on the page.)
- Made sure a page is not checked out when clicking on the quick edit button if the page is in waiting for approval status.
- Fixed issues with approval for translated pages.
- Fixed issue with the Go to News Archive button in the News Viewer with IE11 on Windows 7.
- Fixed issue with the setting Preferred Language in the News Viewer.
- Fixed issue with the paging control in the News Archive.
- Fixed issue with long descriptions in an event in the aggregated calendar.
- Fixed issue with Show all Events in mobile mode.
- Fixed issue with targeting in the RSS reader block.
- Fixed issue with event details not being shown for certain users.
- Fixed issue with redirect to quick page when clicking on the physical page url (for example in the page library).
- Fixed issue with following feature in My Sites creating duplicate rows. (If a user already have duplicate rows, the user needs to unfollow and follow the site again to get rid of the duplicates.)
- Fixed problems with My Sites and My Links navigation in mobile mode.

Omnia.DocumentManagement (1.0.13718)

- Fixed problem with the metadata replace feature in DOCX making the page numbering fields corrupt.
- Fixed issues with the process related documents API used by Omnia.QMS.
- Fixed some issues with the documents bulk update feature.
- Fixed issue that could happen with Person Properties when moving a controlled document from one site to another.
- Fixed issue with certain placeholders in DOCX not being able to be replaced if a color style is applied to the text.

Release Notes September 2018 Patch 3

Omnia.Foundation (1.0.13964)

- Improved performance in load rules for vue components.
- Fixed problem with social dates in News Viewer for Danish and German language.
- Made sure moment.js (used for displaying dates) support more languages.
- Fixed issue with CSS from Omnia spilling over into modern site pages quick launch.
- Person field is rendered in a nicer way in the Strengthen profile wizard.
- Fixed issues with CSS from Omnia spilling over into classic SharePoint pages.

Omnia.Intranet (1.0.13966)

- Fixed some issues with the Aggregated Calendar and current month view.
- Fixed issue in My Sites navigation when moving from Following to All Sites after a search.
- Fixed problem with Teams not being provisioned if using Site Approval.
- Fixed possibility to have multiple terms on a filter in News Viewer.
- Fixed style problem on buttons in Aggregated Calendar.
- Fixed issue with Priority when using more than two News Viewers on a page.
- Fixed missing Swedish translation on some labels.
- Added possibility to select Omnia Profile for Office 365 Group templates.
- Fixed scrolling issue in mega menu when having many items.
- Fixed incorrect Swedish translation in comments control.
- Fixed issue with quick page redirect in sub publishing sites.
- Fixed issue with unsave warning showing even if the page is saved in Manage Content.
- Fixed some issues with undoing changes in Manage Content for non published pages.
- Fixed issue with image not being shown correctly in the News Roller in certain scenarios.
- Fixed issue with inherited Page Properties in sub publishing sites.
- Fixed problem with Team Site Quick Edit not showing user groups if associated owner/member is not set in sub site.
- Ensured Aggregated Calendar uses correct locale with current UI Culture Name.

Omnia.DocumentManagement (1.0.13956)

- Fixed issue when Document Property is changed from single to multiple selection.
- Fixed issue with Document Property when renamed.
- Made it possible to sort on title in Document Viewer when integrated in the Process Viewer in QMS.
- Fixed issue opening converted PDF document with special characters in title.

Omnia.QMS (1.0.13538)

- Fixed issue that could happen when creating process via graph tab.
- Fixed document icons in Tools.

Release Notes September 2018 Patch 4

Omnia.Foundation (1.0.14143)

- Fixed critical issue with Google Chrome version 71.0.3578.80.
- Fixed issue with modern header not being able to render in Site Content on modern sites.
- Fixed issues related to SharePoint 2019.
- Made sure Omnia Page Layouts can be restored from the Recycle Bin in SharePoint.
- Fixed issue when creating Communication Sites using approval.

Omnia.Intranet (1.0.14150)

- Fixed issue with multi lingual sites and available fields in the News Archive settings.
- Fixed missing localization in create site dialog.
- Made sure mandatory links are also shown in All Links in the My Links navigation control.
- Fixed issue with editing banner groups in Omnia Admin.
- Fixed style issue with rows breaking in the middle of words in the News Viewer.
- Fixed some issues with managed metadata fields in the Strengthen Profile dialog.
- Fixed issue with sending e-mails in Strengthen Profile dialog if user name and e-mail differ.
- Fixed issue with translated properties in the Strengthen Profile dialog.
- Style fix for My Recent Documents.
- Fixed issue with Likes count in the User Feed.
- Fixed some wrong Swedish translation.
- Fixed issues with localization in the Aggregated Calendar.

Omnia.DocumentManagement (1.0.14156)

- Fixed issue with some users getting access denied on review reminder tasks.
- Removed the possibility to select predefined person field Approver as person to approve a document in Document Type settings.
- Fixed issue with managed metadata filter in Publishing tab not supporting more than 50 values on one level.
- Fixed issue that could happen in the publishing workflow leading to published documents not being tagged with status Published.

1.10.10 Release Notes July 2018

Features

Web Page Approval

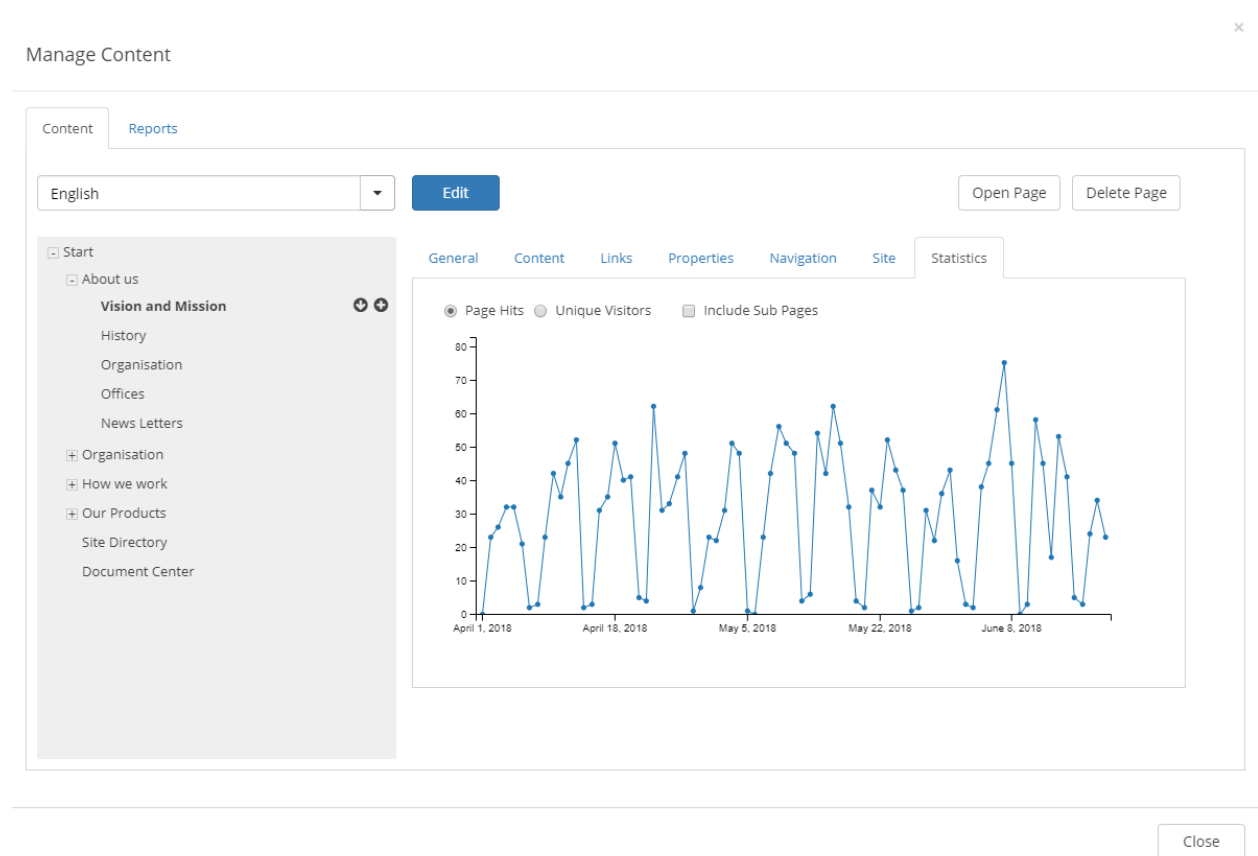
Simple Approve/Reject functionality has been added to the Manage Content UI.

The screenshot displays the Manage Content UI for a web page. At the top, there are four buttons: 'Edit' (blue), 'Approve' (light gray), 'Reject' (light gray), and 'Open P' (light gray). Below these buttons is a tabbed interface with six tabs: 'General' (selected), 'Content', 'Links', 'Properties', 'Navigation', and 'Statistics'. The 'General' tab is active, showing a form with two fields: 'Title' and 'Summary'. The 'Title' field contains the text 'About Us'. The 'Summary' field contains the text 'Lorem ipsum dolor sit amet, consectetur adipiscing elit. Mauris libero sed maximus. Proin ut libero nec neque gravida tincidunt'.

Activate approval on the Pages library in SharePoint to show the Approve/Reject buttons.

Web Statistics

A new tab has been added in the Manage Content UI showing page hits and unique visitors statistics for each page.



It is also possible to consume three types of reports:

- Usage: Most viewed pages.
- Review: Pages that needs review.
- Checked Out: Pages checked out by users.

Manage Content

Content
Reports

Usage
Start Date
End Date
Type
Contact

Page	Contact	Page Hits	Unique Users	Last Viewed
About Us	Robert Johnson	2352	164	June 20, 2018
Start	Adele Vance	1398	154	June 19, 2018
This needs to be approved	Robert Johnson	14	123	June 19, 2018
Organisation	Robert Johnson	13	4	June 19, 2018
About us	Lynne Robbins	11	4	June 19, 2018
Top story of the day	Robert Johnson	9	2	June 18, 2018
History	Robert Johnson	7	3	June 19, 2018
Main quick page	Robert Johnson	5	2	June 19, 2018
News Letters	Lynne Robbins	4	2	June 18, 2018
Offices	Adele Vance	4	2	June 19, 2018

1
2

Close

Default Document Types (Document Mangament)

It is possible to configure which document types that should be default in the controlled documents library in a team site.

Controlled Documents Library Settings

General
Drafts
Published
Document Types

Language
English

Document Type
Project Plan x Project Specification x Project Report TG 1 x Project Report TG 2 x Project End Report x


Save
Close


These document types will be shown as suggested in the document wizard with a possibility to show all document types.


Create New Document


☒ Controlled Document


Select typeEnglish

Project Plan

Project Specification

Project Report TG 1

Project Report TG 2

Project End Report

Show All

CREATE

CANCEL

If no Document Types are selected for a specific team site, the wizard will automatically suggest the last five document types used by the current user.

Select Specific Documents in Query (Document Mangament)

It is now possible to select specific documents that should be shown in the Controlled Documents Viewer.

×

Controlled Documents Viewer Settings

[General](#)
[Query](#)
[Columns](#)
[Filters](#)
[Refiners](#)
[Design](#)

☐ Query Builder
 ☒ Select Documents

☐ Utility 11 product manual
☒ Develop Product Handbook
☒ Product Development Targets 2018

Document Revisions (Document Mangament)

It is possible to configure per document type whether revisions should be allowed or not. If needed, a revision can bypass approval.

[Document Management](#) » [Document Types](#)

Document Types

Corporate Template

Business Plan

Work Instruction

Product Documents

Project Documents

Meeting Minutes

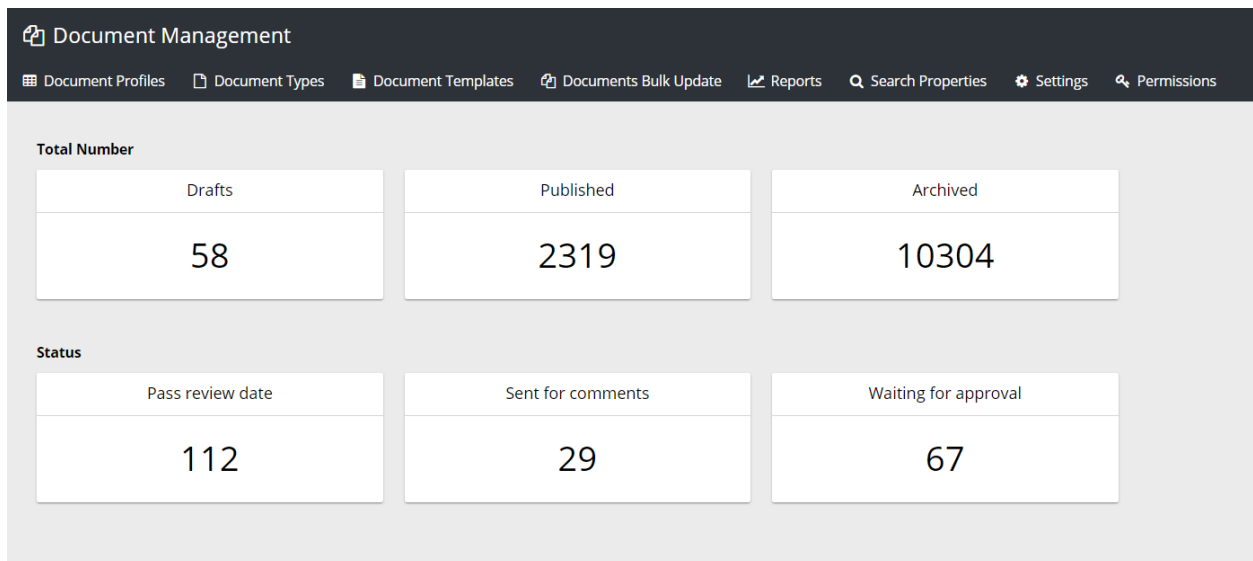
[General](#)
[Publish](#)
[Review](#)
[Archive](#)

☐ Do not replace property placeholders with values on publishing
☒ Allow Revisions
☒ Allow To Bypass Approval For Revisions
Publishing Approval

☐ No Approval
☒ Anyone
☐ Limited list of users
☐ Term-driven
☐ Based on person column
☐ Site approvers group

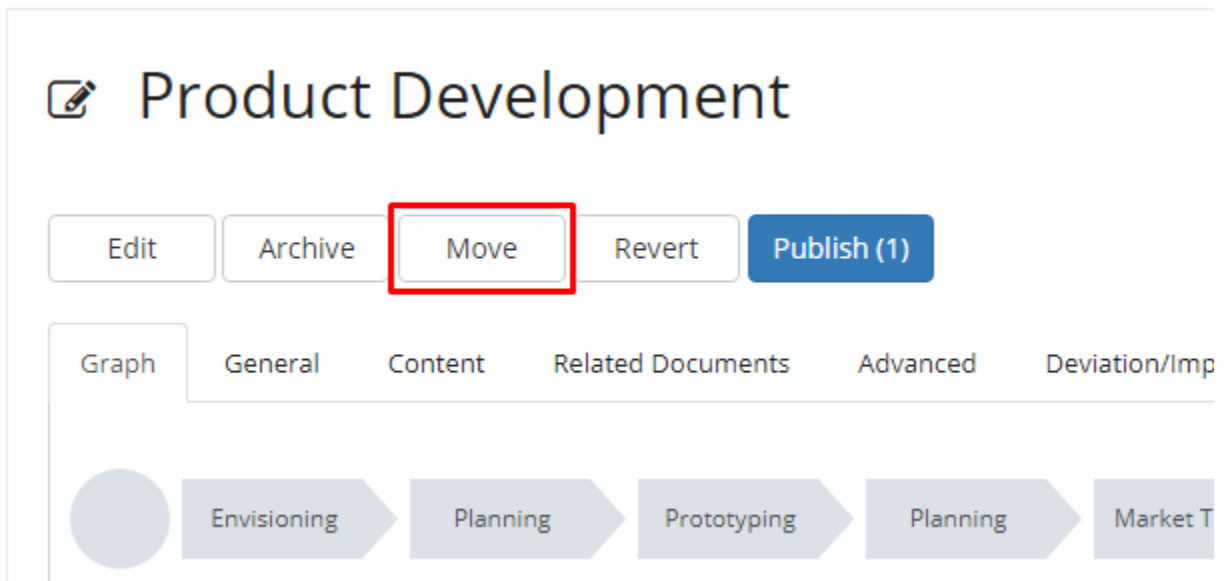
Document Statistics (Document Mangament)

In the start page of Document Management in Omnia Admin you will find statistics for all controlled documents.



Move Process (Quality Management)

It is possible to move a process from one team site to another.



×

Move Process

Target Site Url

Site*

Open Link in Dialog (Quality Management)

It is possible to select whether a custom link (in the Tools tab or in a custom graph image) should be opened in the current window, a new window or a dialog.

Graph General Content Related Documents **Tools** Tasks Advanced

Custom Link ▼

Url




Title

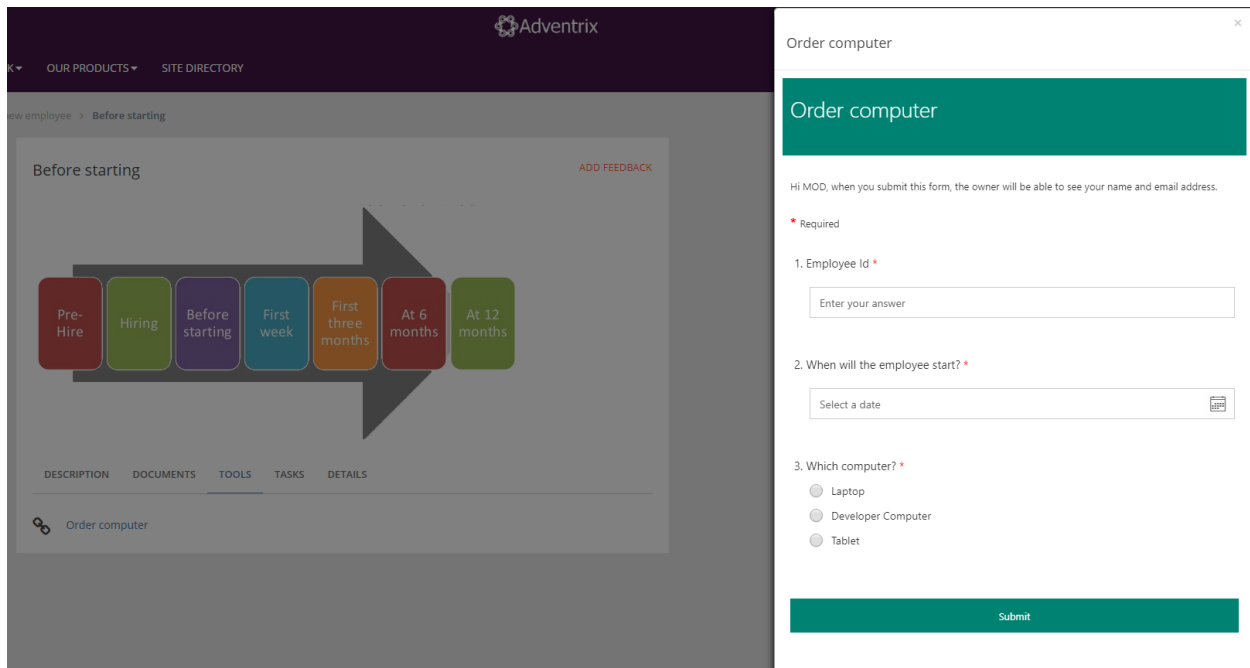
Open in

Width

Height

Links

 Order computer  



Central Deviations/Improvements Report (Quality Management)

A new set of central administration features for QMS will rollout in the coming releases. First out is a central Deviations/Improvements Report.

QMS » Deviations / Improvements

Search Type Status Responsible Date from To date

Title	Type	Status	Date ↓	Responsible	Process
Form used for system access is wrong.	Deviation	Suggestion	2018-06-11		Onboarding of new employee
There should be a possibility to access CRM data.	Improvement	Suggestion	2018-05-15		Product Development

Bug Fixes and Small Improvements

- The SharePoint standard icon in quick search for sites and web pages has been replaced with the Letter Avatar for sites and a web page icon for web pages.
- It is possible to configure My Sites to show a Letter Avatar instead of the site template icon.
- Fixed issue with certain web page results in quick search showing /null as url.
- Fixed issue with Omnia Admin showing 500 error when accessed from classic SharePoint sites.

- Fixed issue with Layouts in Content Management in Omnia Admin not showing correctly when accessed from a sub site.
- Fixed issue with “Inherit from Parent” not being visible when sub site is in context in Omnia Admin > Content Management.
- If two news viewers have the same priority, a duplicate news article will be shown in both from this release.
- Fixed issue with the “Omnia Intranet Page Layouts” feature failing on initial activation.
- Made it possible to allow links in comments on web pages.
- Added possibility to set opacity on the News Roller view.
- Added possibility to set opacity on banners.
- Summary field on a web page now support line break.
- When you navigate to a web page or news article (quick pages) the page is now scrolled to the top.
- Fixed margins in People Rollup.
- New items in the RSS Reader is now marked with an icon in the Notification Panel.
- Fixed issue with long metadata terms (page properties) not being displayed in a nice way when too long text.
- Fixed graphical issues in Page Properties blocks in IE 11.
- Modern team sites are now displayed as last visited.
- Possibility to set whether the top navigation should be shown for external users or not.
- Fixed labels in Create Site wizard.
- Added tooltips on the icons in the new modern slim header.
- All document icons have been replaced with better quality modern icon images. (Document Management)
- We have added better support for date refiners and date filters in the Controlled Documents Viewer. (Document Management)
- Properties set in the publish form will be remembered the next time a draft is published. (Document Management)
- When a user is idle in the Controlled Documents Library for about 20 mins it doesn’t throw an error anymore. (Document Management)
- The search box in the Controlled Documents Library now searches on Document Id as well even if the document id is not inside the document. (Document Management)
- Problem with certain text within DOCX being modified wrongly in the publishing process. (Document Management)
- Fixed issue with preview of PDF documents in Safari browsers. (Document Management)
- In the Details tab in the Process Viewer, a link has been added to the team site where the process is stored. (Quality Management)
- All Angular 1 dependencies have been removed from QMS. (Quality Management)
- The design of the Process Viewer has been updated to align with the design of a web page in Omnia Intranet. (Quality Management)

Release Notes July 2018 Patch 1

Omnia.Foundation (1.0.12331)

- Fixed issue with metadata field with multiple selection not scrollable when creating a site
- Fixed issue with not being able to edit Html/Script in Notification Panel.
- Fixed issue with permission errors when make public in Site Directory.
- Fixed issue that when there are more then one News Viewer categories in Notification Panel, it was not possible to change the category.
- Fixed some additional issues with News Viewers on the start page.

Omnia.Intranet (1.0.12470)

- Fixed issue with missing page layout property on certain pages.
- Fixed issue with HTML showing in Create Site dialog in Internet Explorer 11.
- Fixed issue with Lotus Notes links in My Links.
- Fixed problem with null indexing on targeting definitions for specific news articles.
- Fixed problem with Omnia Admin not working from a modern team site.
- Fixed issue with notifications on aggregated calendar not being removed correctly.
- Fixed issue with different contact photo size in Page Properties.
- Top aligned title in high priority announcements.
- Aligned graphical design of action links.
- Fixed issue with News Center link in different Omnia Profiles.
- Fixed issue in My Recent Links.
- Made it possible to select targeting columns as viewable in Page Properties.
- Fixed issue with hover effect in Create Site dialog.

Release Notes July 2018 Patch 2

Omnia.Foundation (1.0.12516)

- Fixed issue with new modern Term Picker in Internet Explorer 11.
- Implemented LoadIfFeatureActivated in Omnia Fx.
- Fixed issue with documents not being displayed correctly in modern doc library with new modern header.
- Fixed issue with onModelChange not being triggered in new Term Picker.
- Fixed issue when publishing a modern team site in Internet Explorer 11.
- Fixed issue with custom localization not being reflected in components.
- Fixed issue with only two comments showing in the new User Feed control.
- Fixed issue with timer job not being able to be set to more than one day.

- Fixed problem with Create Site dialog closing when clicking outside of it loosing all values.

Release Notes July 2018 Patch 3

Omnia.Foundation (1.0.12865)

- New behaviour in Quick Search. When a quick page is navigated to in the search result, the Quick Search dialog will close.
- Fixed issue with localization being displayed wrong in many controls.
- Fixed issue with the mobile view of My Sites and My Links.
- Made it possible to exclude personal sites from the My Sites all scope.
- Fixed Date Time error when editing a page in German.
- Fixed some issues with the tutorial of type Tooltip.

Omnia.Intranet (1.0.12862)

- Fixed issue with really long titles in News Viewer.
- Fixed issue with random events of white space in the bottom of the page.
- Fixed problem with approve/reject for news articles.
- Sort now runs on load in Document Rollup.
- When likes and comments are disabled on a page they do not show up in the News Viewer either anymore.
- Remove targeting values when saving a page with “No targeting”.
- Fixed likes and comments count in news viewer for translated pages.
- Fixed issue with icon disappearing the first time you search in My Links.
- Fixed issue with top nodes in the mega menu not being able to be opened in new window.
- Fixed spacing in bottom of the Document Rollup control.
- Fixed tooltip on follow in new modern My Sites control.

Omnia.DocumentManagement (1.0.12842)

- Fixed issue that could occurred when deleting/publishing controlled documents because folders could not be deleted if not empty.
- Fixed issue with creating non-controlled documents in the document wizard.
- Fixed some issues with migrated controlled documents from other system. Placeholders in DOCX were not replaced as expected.
- Fixed issue with certain special characters being replaced on publishing of controlled documents.
- If you double click on the save button in Document Profile Properties, the system will create two identical properties. This issue has been fixed.
- Fixed some exceptions that could happen on publishing when having certain content within a DOCX template.
- Fixed issue with column filtering in controlled documents library after paging of documents.

- The create document wizard “All” tab does not load documents by default anymore.
- Documents with the # character in the filename could not be unpublished. This has been fixed.
- Fixed certain lables in the new document wizard not being localized correctly.
- Fixed some issue with documents being corrupt when merged with template in the draft creation wizard.

Omnia.QMS (1.0.12483)

- Fixed some temporary issues with process mapping on custom images disappearing after update.
- Made it possible also to provision task in linked processes.
- Fixed issues with newly uploaded documents in the Tools library not showing up.
- Fixed issue with double process lists on an authoring site.
- Made it possible to add AD security groups when limiting access to a process.

Release Notes July 2018 Patch 4

Omnia.Foundation (1.0.13011)

- Modification of script loading to improve when many News Viewers are loaded on a page.
- Removed localization limitation in Omnia Admin.

Omnia.Intranet (1.0.13008)

- The correct comments and likes count are now shown for translated news articles in the News Viewer.
- Fixed bug with draft pages not being deleted in the Pages library in SharePoint.
- Fixed JS error showing up in the developer console. “Cannot read property ‘replace’ of null...”.
- Fixed issue with Tutorial permissions for editors.
- Fixed an issue in targeting of common links. A specific label was not able to be set.
- Removed a reference to “https://r3.res.outlook.com/o365/versionless/wexprereq_3750ce96.js” that is no longer available.
- Fixed issue with deactivating targeting in a News Center.
- Fixed issue with dialog freezing on publishing in specific content structures.
- Fixed issue with banner targeting not working as expected in the Notification Panel.
- Fixed issue with People Rollup showing access denied for external users.
- Fixed issue with encoded characters in Document Rollup query.
- Fixed issue with the text not showing up if News Viewer returns no items.

Omnia.DocumentManagement (1.0.13001)

- Fixed issue with workflow history being empty on certain draft documents.
- Fixed issue with the navigation filter in the Controlled Documents Viewer.
- Fixed issue with draft documents showing up (for editors) in the Controlled Documents Viewer when using specific queries.
- Fixed issue with missing controlled documents in the Process Viewer (in QMS) if too many documents selected.
- Fixed issue with PDF converted preview copies showing up in the drafts view when documents were in “waiting for approval” state.
- Made sure that the Document Icon in the top menu is removed when Omnia Document Management is uninstalled.
- Fixed issue with certain documents showing error when clicking on the info icon in the Controlled Documents Viewer.
- Fixed issue with problem when finding specific people in bulk update in Omnia Admin.
- Fixed issue with e-mail not being sent out in workflow for specific people.

Omnia.QMS (1.0.12978)

- The breadcrumb in QMS has been changed to support integration with Omnia Intranet. If no specific start node is set in the Process Viewer, the current navigation node in the content structure will be used as start node.
- Fixed specific issues when adding Tools.
- Fixed issue with linking directly to a sub process using a url.

Release Notes July 2018 Patch 5**Omnia.Intranet (1.0.13159)**

- Fixed issue with News Viewer showing wrong news articles for users with certain languages.
- Fixed issue with new banner not being shown in edit mode when added.
- Fixed graphical issue with comments and likes icon being shown on top of other text.
- Fixed issue with not being able to create two personal links with the same icon color.
- Fixed issue with aggregated calendar not showing events correctly in certain scenarios.

Omnia.QMS (1.0.13123)

- Fixed issue with certain processes not being able to use the function Map Process.
- Fixed issue with certain deviations/improvements not showing up as expected.
- Fixed issue with certain e-mails not being sent out correctly for deviations/improvements.

Release Notes July 2018 Patch 6

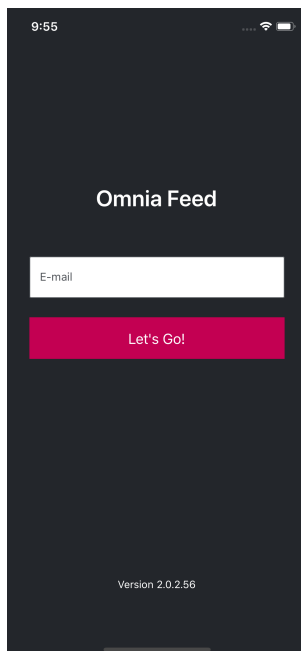
Omnia.DocumentManagement (1.0.13355)

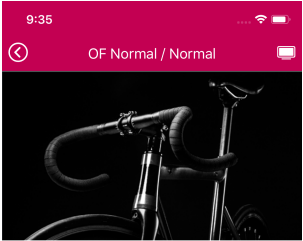
- Fixed issue with open PDF documents in Document History dialog.
- Fixed issue that could happen when publishing a controlled document with appendices.
- Fixed issue with some Unicode characters (for example Subscript) in DOCX that could be wrong after publishing.
- Fixed issue with documents being stuck in “Sent for review” status even if the due date is expired.

1.10.11 Omnia Feed 2.0

Omnia feed has received a major technical upgrade. The design is brand new, and the app is prepared for new features throughout the year.

The app can be downloaded on App Store and Google Play. The update is not forced so depending on the setting on the users phone the app will update accordingly.





A World Championship build
Anna Andersson • 2020-02-19

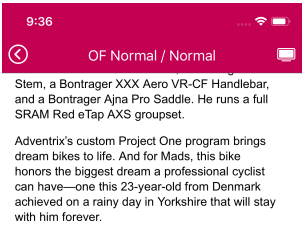
On a wet and windy Sunday in September, everything went right for Adventrix's John Seagrave. From the start of the 2019 UCI Road World Championships in Copenhagen, the weather had kept the peloton on edge.

✔ Bikes, communication, Corporate, launch

You and 1 colleague like this ❤️ 2 💬 2

Breakaways threatened from nearly 250km out, but all were ultimately reigned in and it wasn't until the race entered the final circuit in Harrogate that the heavy punches started to land.

It was a three-man battle in the uphill finish between Mads, Matteo Trentin (Italy) and Stefan Küng (Switzerland). All three were strong, all three were patient. But when Trentin pounced first, Mads reacted immediately—a move that



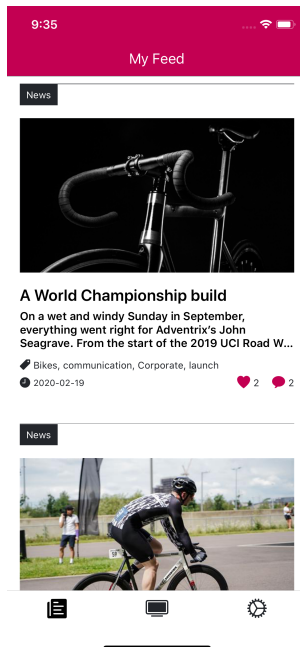
Stem, a Bontrager XXX Aero VR-CF Handlebar, and a Bontrager Ajna Pro Saddle. He runs a full SRAM Red eTap AXS groupset.

Adventrix's custom Project One program brings dream bikes to life. And for Mads, this bike honors the biggest dream a professional cyclist can have—one this 23-year-old from Denmark achieved on a rainy day in Yorkshire that will stay with him forever.

Anna Andersson • 2020-02-20
Great news

❤️ 0





1.11 Contribute to this Documentation

This documentation is a constant work in progress, and contributions can be made on our Github repo. For more extensive contributions please follow the steps below to get started with using Sphinx.

1.11.1 Get started

Please follow the steps below to install Sphinx and get the source code from our Git repository.

1. Install Python

Download and install Python 3.6.0 from here <https://www.python.org/downloads/>

Note: Make sure to select **pip** and **Add Python to environment variables** during the installation

2. Install Sphinx

1. Open a command prompt
2. Run

```
pip install sphinx sphinx-autobuild sphinx_rtd_theme
```

3. Install Git for Windows

Download and install Git from here <https://git-scm.com/download/win>

4. Get the Git repository

1. Create a folder in your file system where you would like to keep the documentation source code, for example

```
C:\Git\OmniaDocs
```

2. In a command prompt, navigate to the folder you just created and execute the following command

```
git clone https://github.com/preciofishbone/OmniaDocs.git
```

The source code is now cloned to the current folder

1.11.2 Work with the documentation

To work with the source code locally using Sphinx, follow the steps below

1. Open a command prompt and navigate to the folder containing the source code for the documentation
2. Execute the following command

```
make livehtml
```

After a while the console window will settle down, and you will find a link in the window, like this
Serving on http://127.0.0.1:8000

3. In a web browser, enter the link from above. A locally rendered version of the documentation will be displayed.

Now, any time you add a file, or edit an existing file and then save it, Sphinx will rebuild the documentation locally and reload the browser window to display the latest changes.

You do edits, additions and deletes by just working with the files in the source code folder in your favorite text editor.

Note: The documentation is written with **reStructuredText**. To learn more about this markup language, you can use this link <http://sphinx-doc.org/rest.html#rst-primer>

To stop Sphinx, press **Ctrl + C** in the command prompt and then select **Y**

1.11.3 Commit your changes

To commit your change to the Git-repo perform the following steps

1. Open a command prompt and navigate to the folder containing the source code for the documentation
2. Execute the following command

```
git pull
```

3. Execute the following command

```
git commit -a -m "A description of your changes"
```

4. Execute the following command

```
git push
```

You have now successfully contributed to this documentation. Thank you for your time and effort!