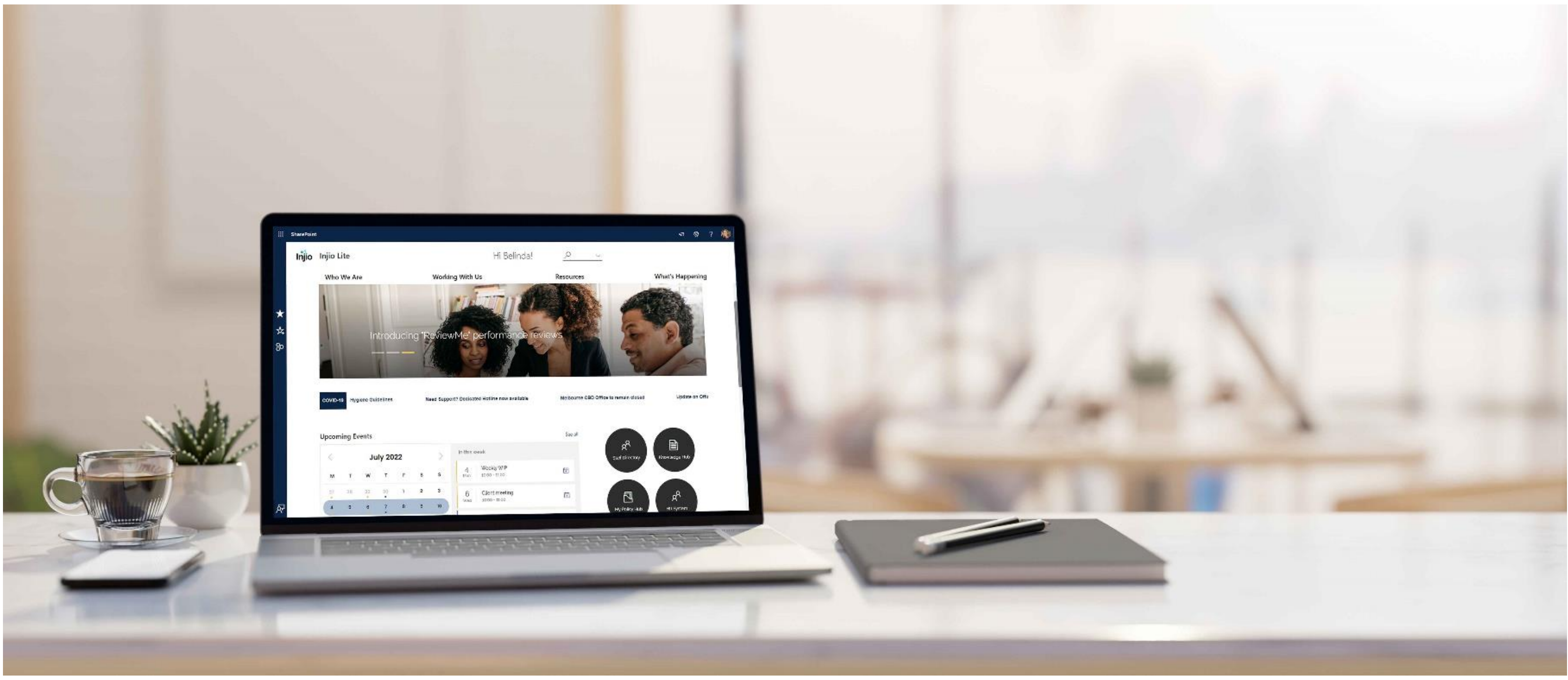
Injio Training Manual – Base Modules



Contents

Introduction

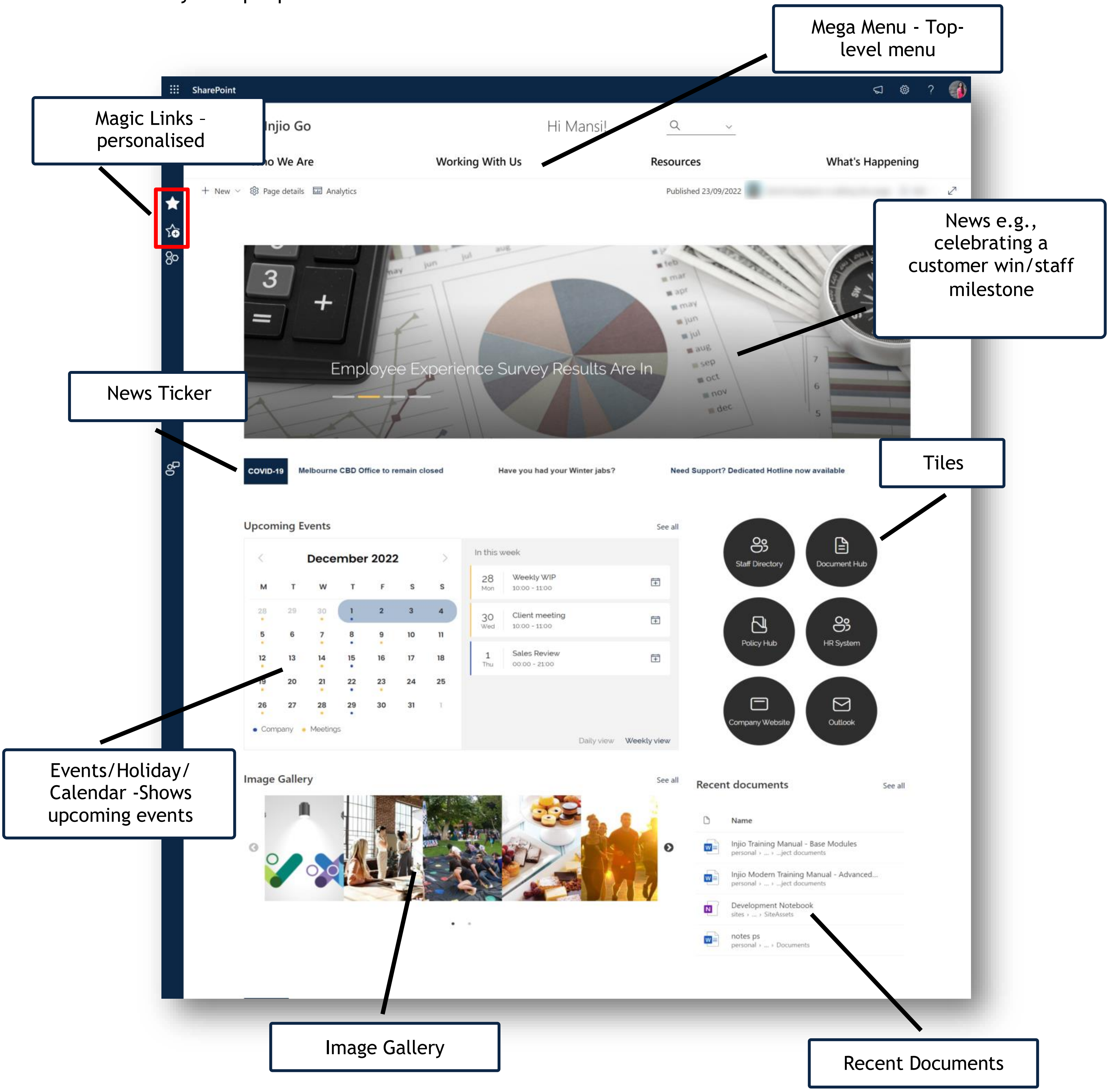
While Injio is designed with best practice information architecture and user experience interface, every organisation is different, and you may wish to adjust the design or structure of your intranet over time.

This guide is designed to assist Intranet Admins to configure their Injio site including menus, modules, colors and content. You will need to have edit access to be able to make these updates. If you wish to make any changes not included in this guide, please contact WebVine.

This guide starts by giving you an overview of the Home Page where these modules appear and will continue to describe how to create and maintain your new intranet in a professional manner.

Homepage

The homepage contains the most important elements of the intranet – the information and functionality that people will use the most.



Glossary

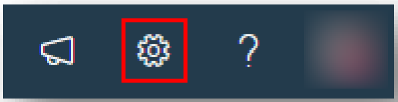
Root Site	Default site in the SharePoint tenant (*https://<TENANT>.sharepoint.com/*)
Data Source	List / Document library that holds the data
Settings	Site settings in the top right corner of the intranet site (gear symbol)
Ellipses	Three vertical dots seen beside items in the lists or next to the list / document library. Clicking on it would display additional options.

Site configurations

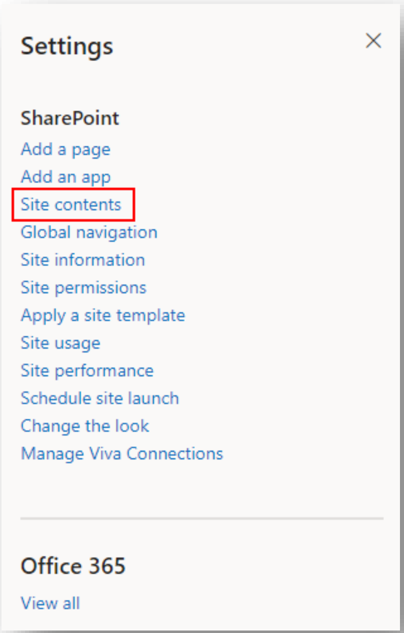
How to navigate to Site Contents

Many configurations in this manual will require you to navigate to Site Contents. Here is how to do this:

1. Navigate and click on Settings symbol in the top-right corner of the Intranet



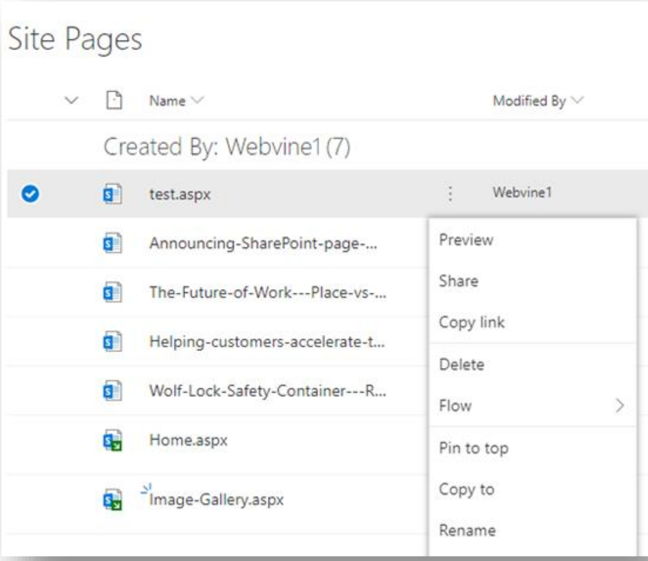
2. Select 'Site Contents' to be redirect to the page



How to rename a URL/make homepage

1. Navigate to Site Settings > Site Contents > Site Pages

2. Find the page > click on the ellipses



3. User can Rename the page or make it as the homepage of the current site/subsite

How to add a site logo

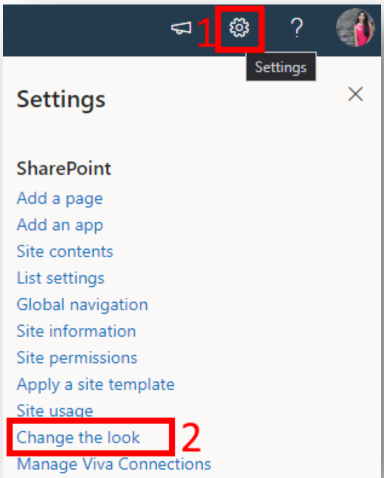
1. Select a logo

   *Note: Dimension: 92px*64px*

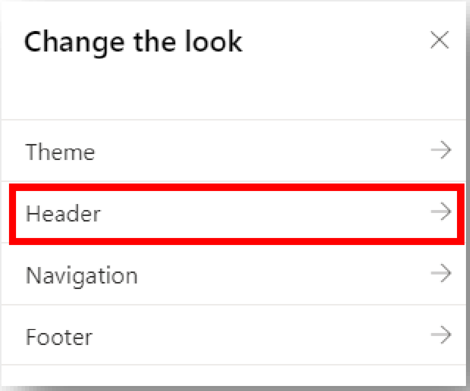
   File size: ≤ 500kb;

   File format: .png preferred

2. Navigate to Settings > 'Change the look'



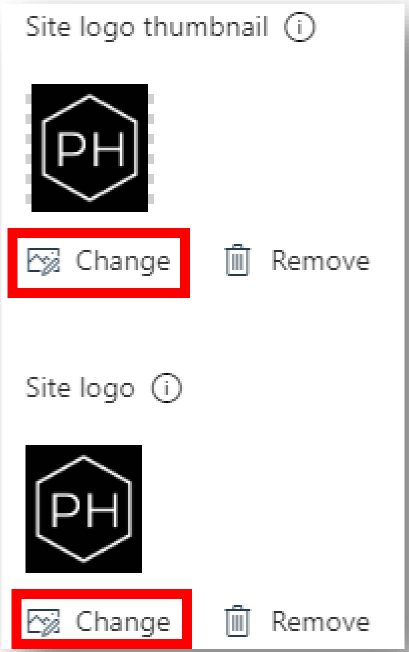
3. Select ‘Header’



4. Navigate to the bottom of the menu to find ‘Site logo thumbnail’ and ‘Site logo’

   Use the change option to select the logo from the local computer files

   Note: Please make sure to change both logos



How to add a favicon and mobile icon

1. Use an online tool to make favicon and mobile icon e.g., https://favicon.io/favicon-converter/

   Note: Dimension ratio: 1 to 1
   *Dimension- favicon: 48px*48px*
   *Dimension- mobile icon: 32px*32px*

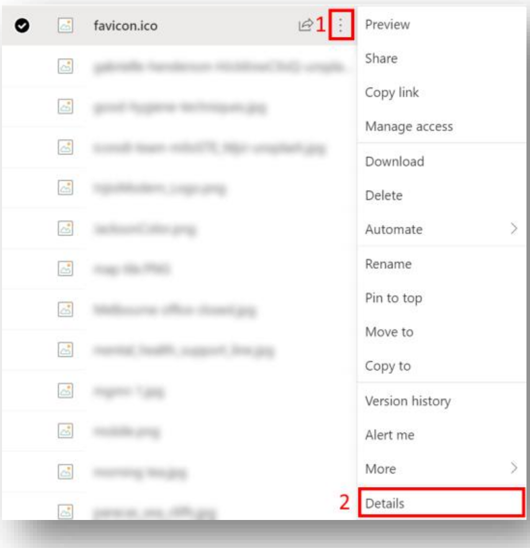
File size: ≤ 500kb
File format: .png preferred

2. Upload the images to Site Assets folder (Settings > Site Contents > Site Assets). You can create a folder for logos (optional)

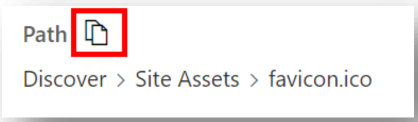
3. Copy path of the image

    a. Click on the ellipses beside the image

    b. Navigate through the menu to find ‘Details’



4. Scroll to the bottom of the menu opened on the right to find ‘Path’ > copy the path using the option



5. Navigate to the ‘Injio Configuration’ list in Site Contents

6. Copy paste the data in the ‘Data’ column in a notepad to make changes

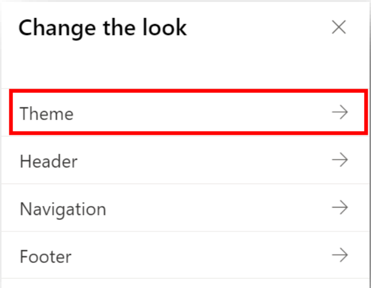
7. Navigate through the data to find ‘**faviconUrl**’ and ‘**mobileBookmarkIconUrl**’ and paste the respective URL in inverted comas (“ ”) and finish with a comma (,)
   Note: Please make sure the inverted commas and comma is placed and no other changes are made to the data

8. Copy-paste the modified data back to the ‘Data’ column and Save

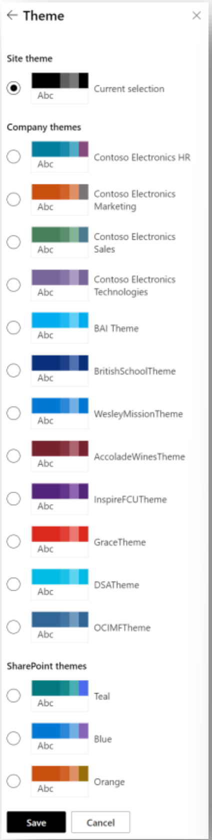
How to change the theme of the intranet

SharePoint has a collection of themes. You can choose the one which is more to your liking.

1. Navigate to ‘Settings’ > ‘Change the look’ > ‘Theme’



2. Choose from the multitude of themes and click on ‘Save’ at the end of the menu



Note:

1. *Please make sure the chosen theme is selected in the ‘Site theme- Current selection’ Please contact WebVine if you want a customized colour*

How to check user access

The default SharePoint groups have three levels of access

1. Owners group: Full control
2. Members group: Edit

3. Visitors group: Read

For permissions granted by SharePoint Group:

1. Go to ‘Settings’ > ‘Site permissions’ > ‘Advanced permissions settings’
2. ‘Under Permissions tab’ > ‘Check Permissions’
3. Input user’s email
4. Click ‘Check Now’

How to grant site access

1. Select the group to whom admin would like to grant user access
2. New > Add Users
3. Search for users by email > select user
4. Show options > check/uncheck to send email invitation
5. Click ‘Share’

How to remove site access

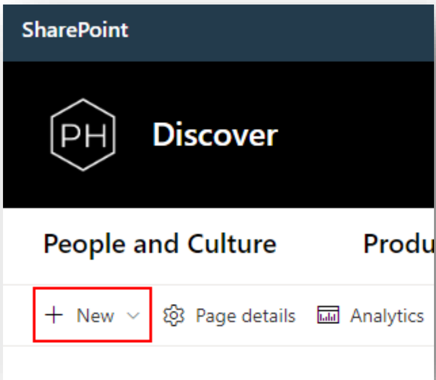
1) Select the group from whom admin would like to remove user access
2) Select the user(s)
3) Actions > Remove Users from Group
   a) For permissions granted by SP Group:
   b) For permissions granted by AD Group:
      Note: Please contact your IT team to remove the user from AD Group

Page authoring and configurations

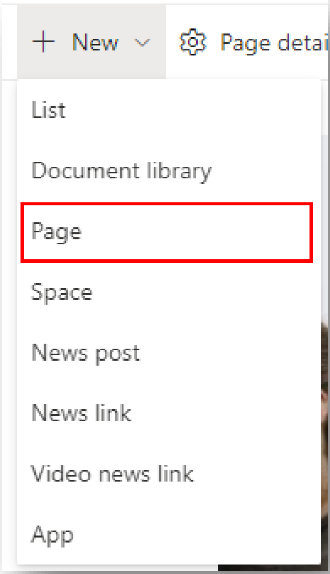
How to create a page and add content

Method 01: Creating a page from the Homepage

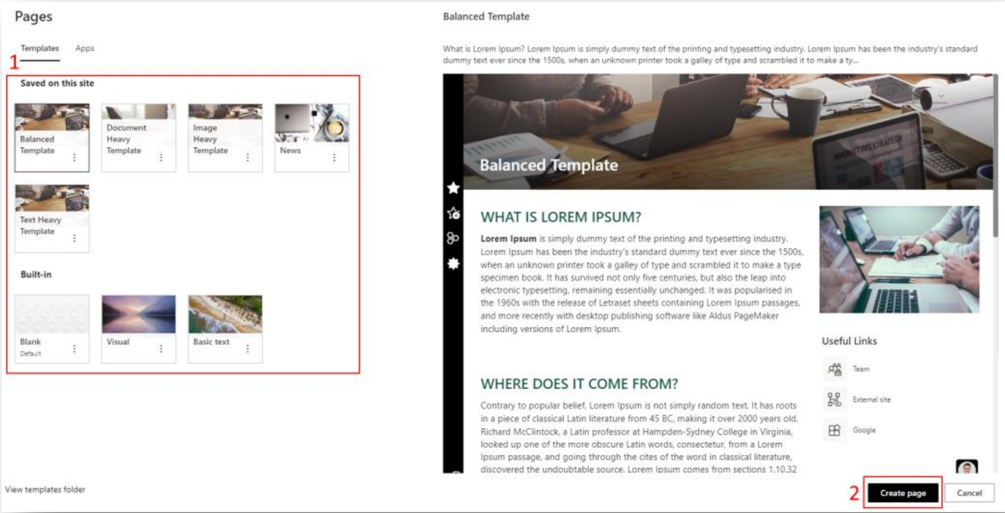
1. Navigate to ‘+New’ option on the Homepage under the Mega Menu



2. Select ‘Page’ from the drop-down menu



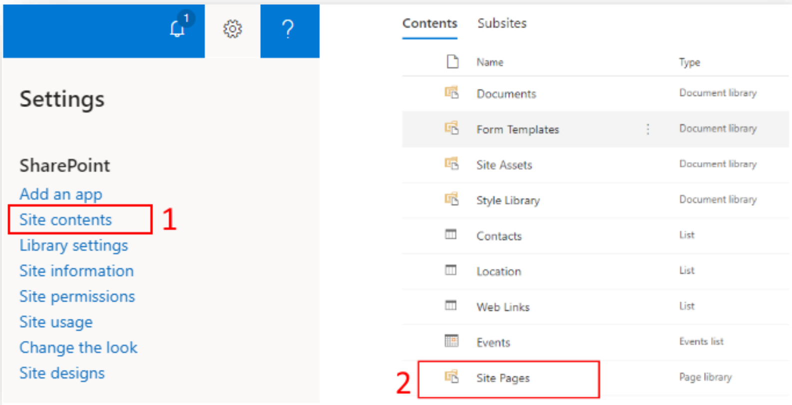
3. Select a template from the existing templates or select “Blank” to make your own page > click on ‘Create page’ to finish.



Note: Refer to "How to create a page template" to create a page template

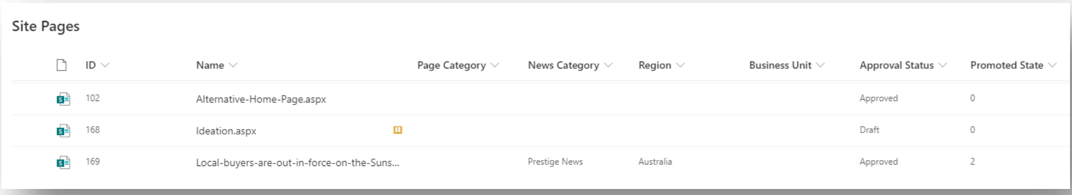
Method 02: Creating a page from Site Contents

Data Source: Settings > Site contents > Site Pages



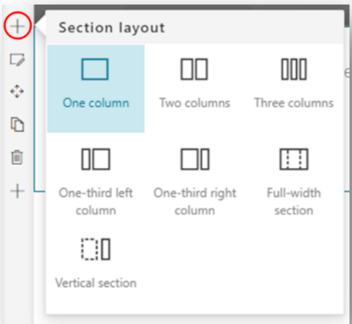
'Promoted State' column helps to distinguish between pages and news as follow:

Promoted State	
0	Page (Draft, Pending approval or Approved)
1	News (Draft or Pending approval)
2	News (Approved)

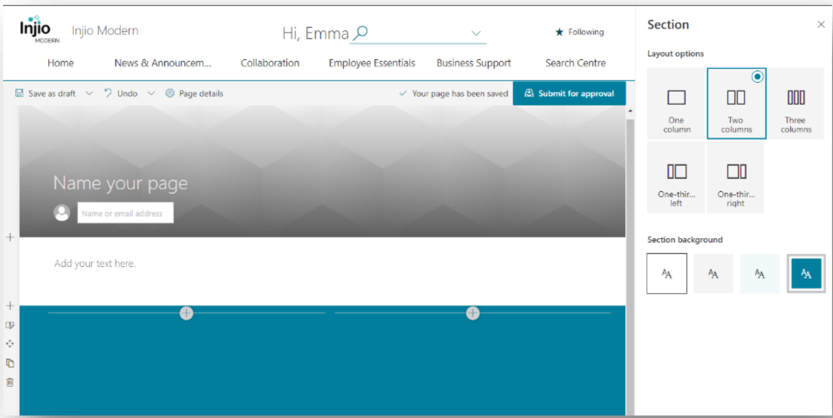


How to add sections to the page

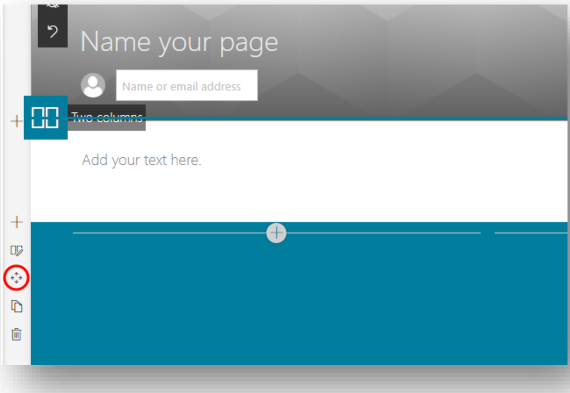
1. Click the ‘ + ‘ icon on the left to create a new section with preferred layout



a. Click within the section or use the  button on the right to update the layout options or to add a background colour of the entire section



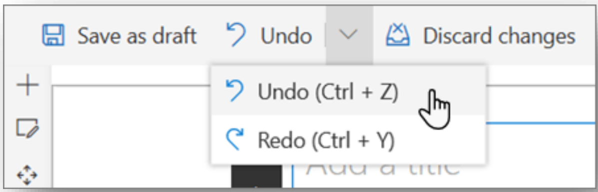
2. Click the  button of a section to drag and drop the section across the page and rearrange the order of the sections



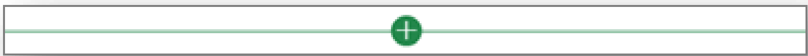
How to add web parts to the page

SharePoint provides a wide range of web parts for building pages. The following are some of the commonly used web parts.

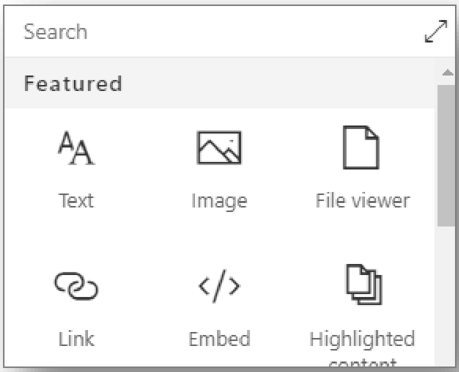
When making changes to your site, such as adding or modifying web parts, you can undo or redo the changes by selecting Undo, and from the dropdown, select Undo or Redo as needed.
Note: Keyboard shortcuts such as Ctrl+Z or Ctrl+Y, can be used respectively



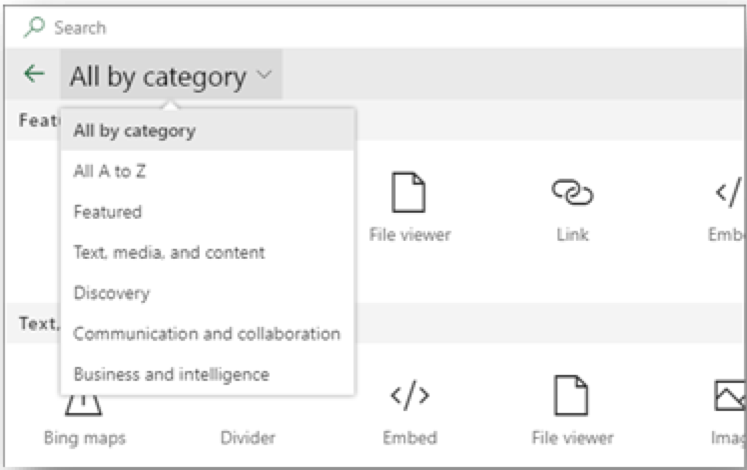
1. Hover the mouse above or below an existing web part, there is a line with a circled +, like this:



2. Click '+' and there is a list of web parts to choose from. To quickly find the webpart, start typing in the Search box



3. Or, click Expand to show a larger view of web parts by category

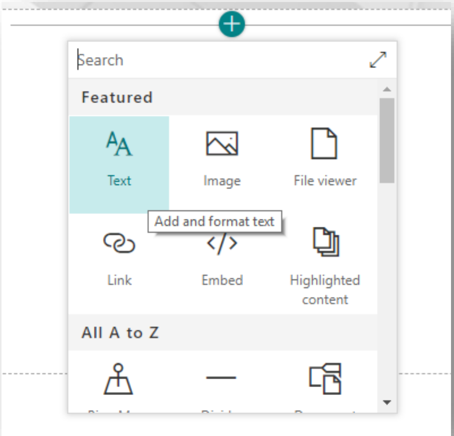


Popular Web Parts

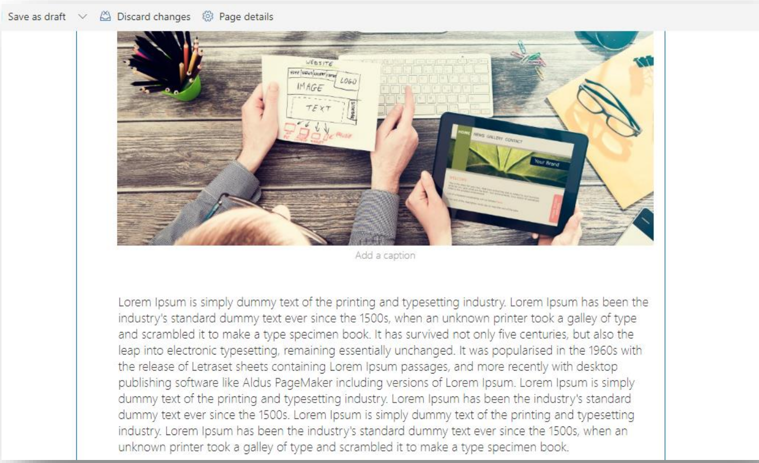
- Text
- Images
- Image Gallery
- Tiles
- Quick Links

Text

Text web part can only contain text and links. Modern SharePoint site does not support rich text

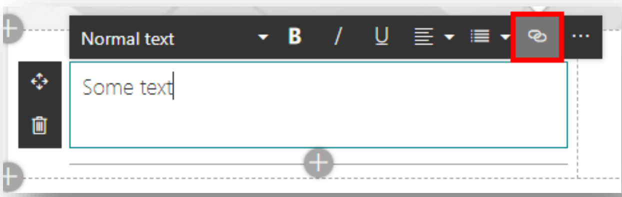


Create a Text web part, copy and paste the entire content from Word document to the text web part. All the content including text and images will be pasted to the page easily.

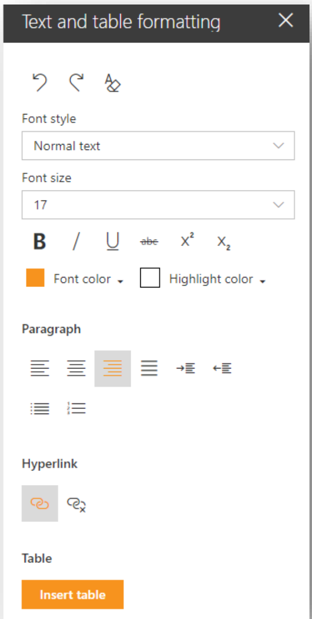


Text can be formatted using the toolbox

1. To add a link, click on the link icon in the toolbox



2. Click the ellipses for more formatting options such as text size and colour. However, font style cannot be changed



Images

The Image web part shows one single image only.
Drag and drop an image from a local computer to the page, and an image web part will be created automatically.

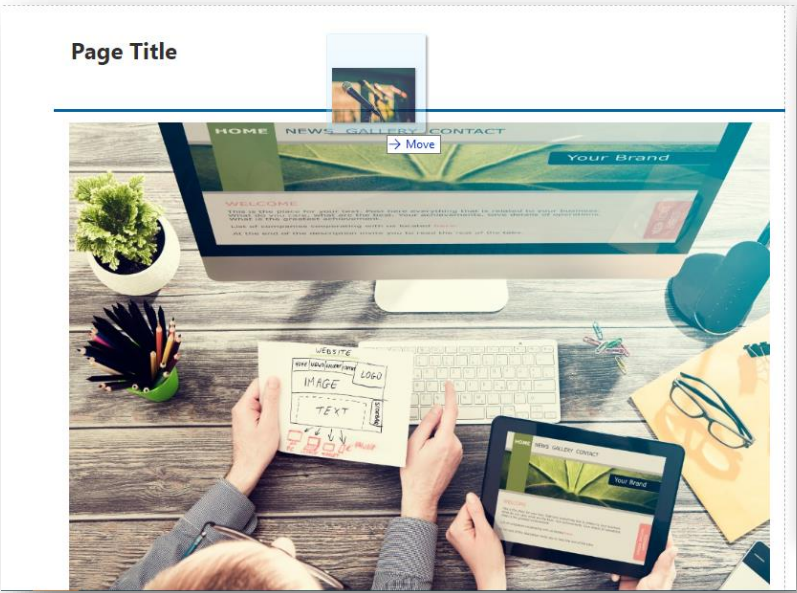
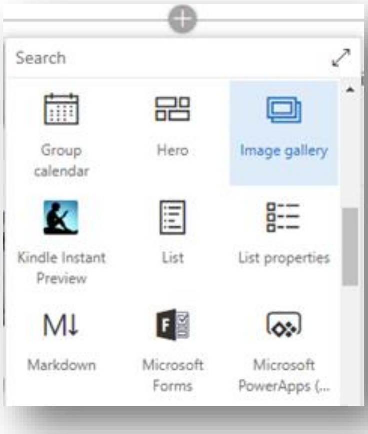
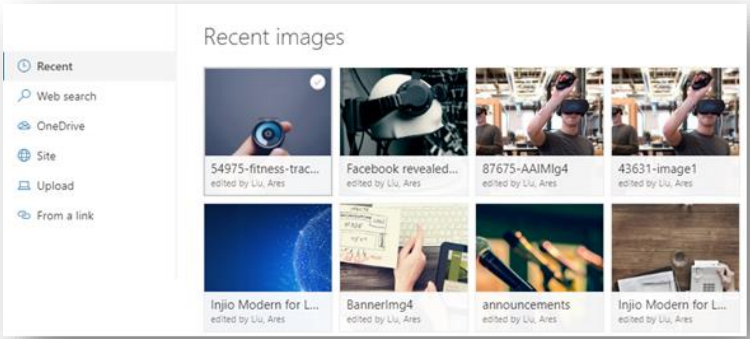


Image Gallery

Use Image Gallery for displaying multiple images



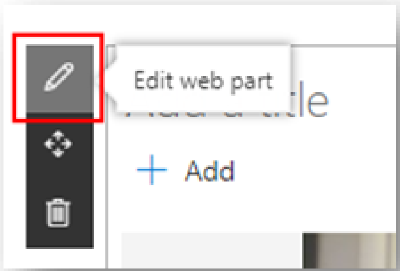
User can choose existing images in the site or upload new images when prompted:



1. Click ‘Open’ after selecting all images.
2. After uploading the images, user can edit the web part layout

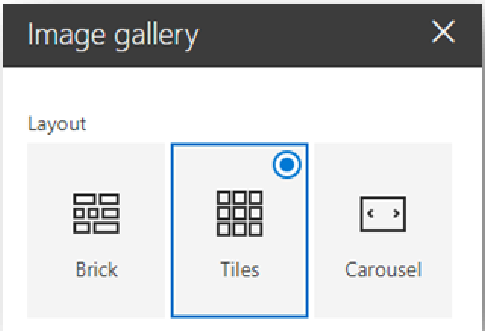
Tiles

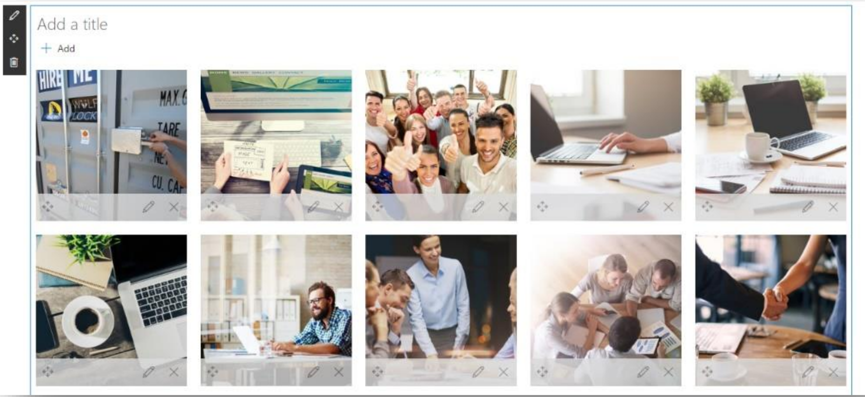
1. Click ‘Edit web part’



j

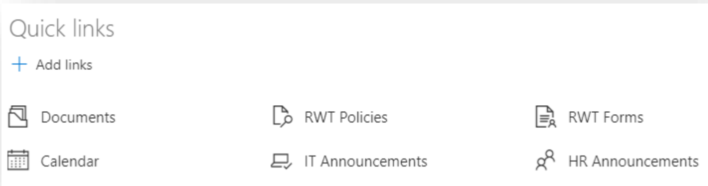
2. Change the Image Gallery layout.



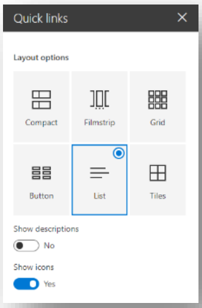


Quick Links

User can create tiles to show links

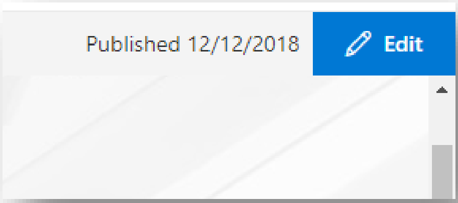


1. Click edit Web Part to change the Layout

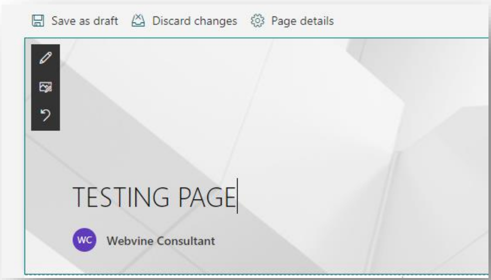


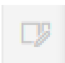
How to edit a page

Navigate to the page user need to edit, click Edit at the top right of the page

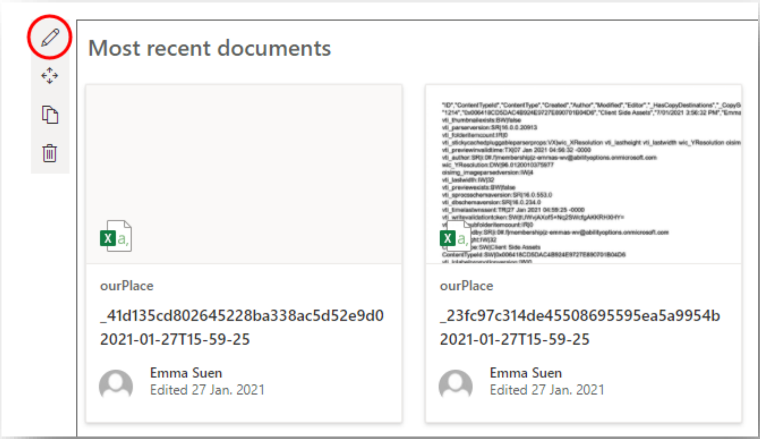


1. Edit the page title on the top (This does not change the URL)

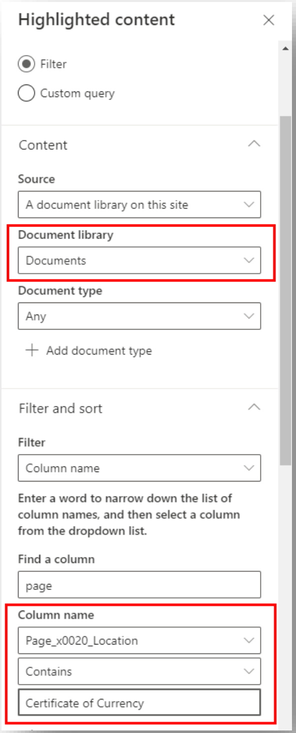


2. Click the  button on the left to change the layout of a section
3. Click the  button of a webpart to drag and drop it across different sessions

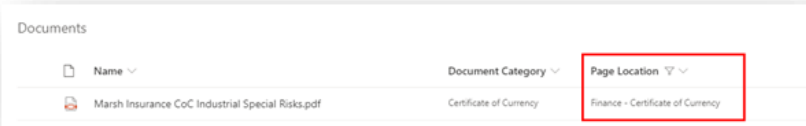
4. Add documents or new content to an existing Highlighted content web part
   In the page with a highlighted content webpart, edit the webpart



Note: Refer to the web part properties to check where to map the document/content

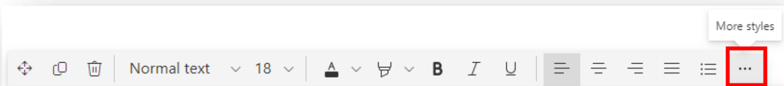


e.g., to have the document to show in this webpart, tag the document in ‘Documents’ library with ‘Certificate of Currency’ under Page Location column

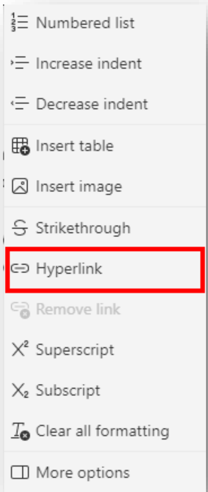


How to hyperlink text in a page

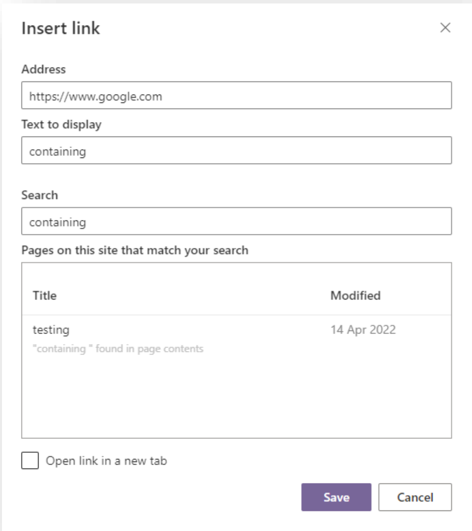
1. Navigate to a page and go to edit mode
2. Select the text you want to hyperlink
3. Click on the ellipses to open more styles



4. Select ‘Hyperlink’



5. Enter the URL in 'Address' and edit other fields if needed



6. Click 'Save'

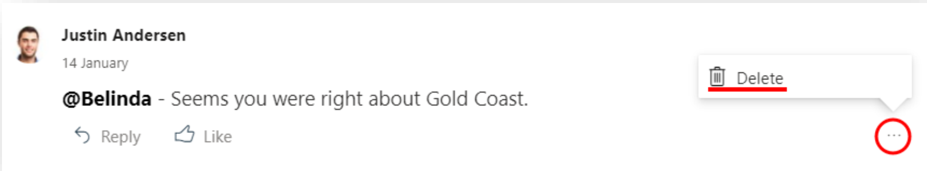
Note: The save button will remain hidden until a link is added

What are comments, likes and views

Users can leave comments and likes at the bottom of the page. User can also see how many views the page has. Hover over Likes to see some of the people who liked the page. Click on Likes and you can see a list of all the people who liked the page

How to remove page comments

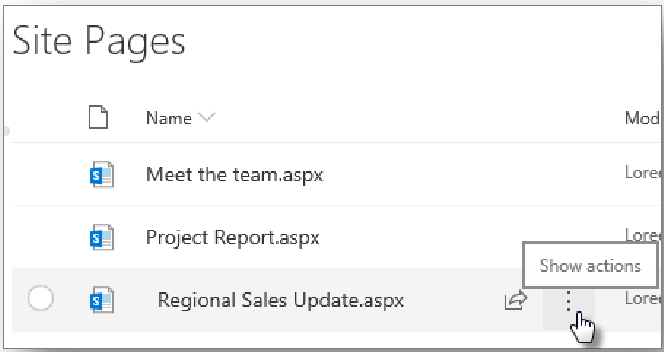
1. Click on the ellipses on the bottom right of the comment > 'Delete'



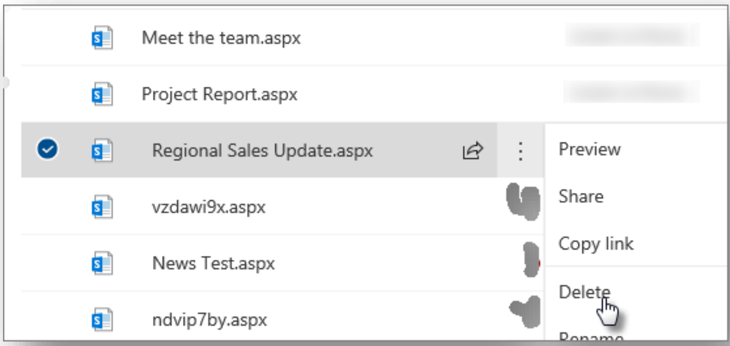
How to delete a page

SharePoint site owners and administrators can easily delete modern pages from a SharePoint site.

1. Navigate to Site Settings > Site Contents > Site Pages
2. Select the page > click on the ellipses to the right of the selected page

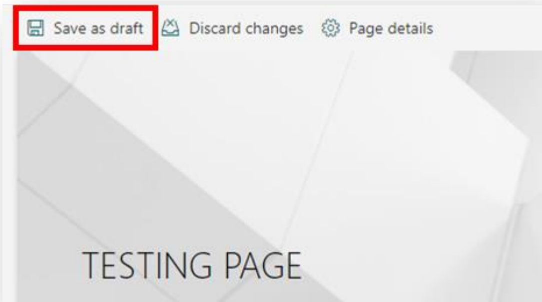


3. Click 'Delete'



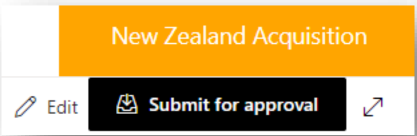
How to save a page as a draft copy

If user wants to make changes to a page but does not want it to be visible to the audience yet. User can click ‘Save as draft’ on the top bar. Only users with edit access can view this.



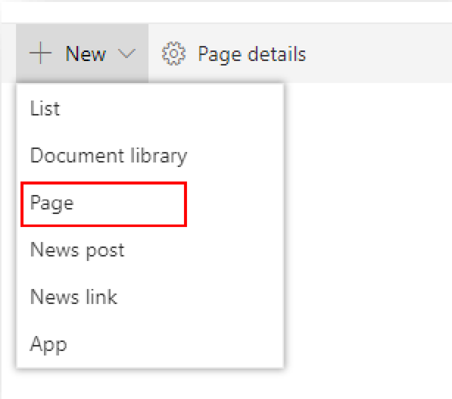
How to publish a page

For all users to view the page, the editor must publish the page (Submit for Approval- if set up)



How to create a page template

1. Navigate to ‘+New’ > ‘Page’



2. Select an existing template or “Blank” to start with
3. Add a page name in the title area. A page name is required to save the page

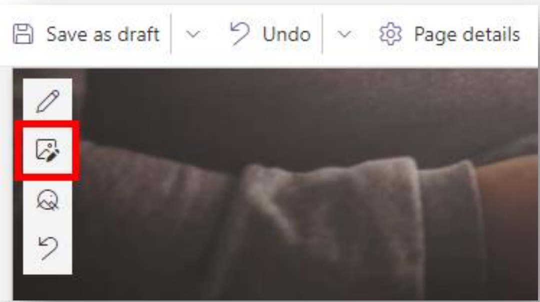
4. Add an image to the banner area or use the existing image from the template

   *Note: Dimension: 1800px*326px*

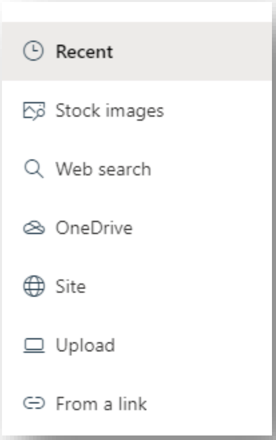
   File size: ≤ 500k

   File format: .png preferred

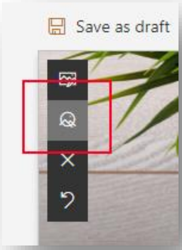
5. Selecting an image-
   i. Click on the image icon to upload a picture



You can select images from any of the options listed



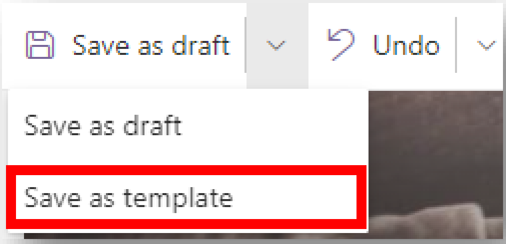
ii. Click the icon to reposition the image



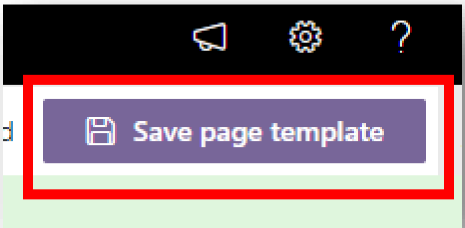
Drag the cursor to set a focal point

iii. Edit the Title Region- select the pencil icon on the banner to open the menu

6. Add webparts (text, images, etc.) to the page
7. Select 'Save as template' from the drop-down menu beside 'Save as draft'



8. Give a title to the template and click on “Save page template” on the top-right corner of the page to finish



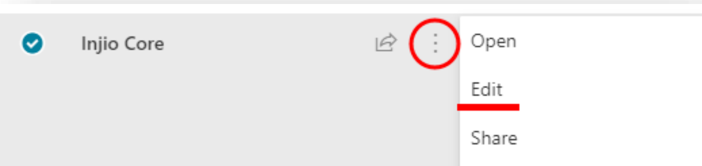
Injio Configurations

Injio Configuration list allows users to customise the intranet look & feel.

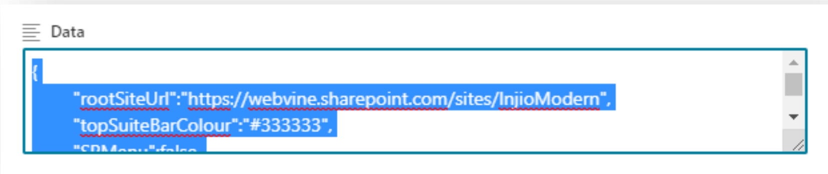
Date Source: Site contents > ‘Injio Configuration’

Configuration for custom look & feel

1. In the list, click on the ellipses next to Injio Core and select ‘Edit’ from the menu



2. Highlight and copy the text in Data field



3. Paste it in a notepad for easier editing
4. Refer values to the following table
5. Replace the values to customise look & feel for the intranet
6. Paste the text back to the Data field > ‘Save’

Value reference list:

Title	Description	Value
rootSiteUrl		URL start with https:// (This needs to be updated after the site URL change)
Top bar Properties		

topSuiteBarColour	Color of the top (SharePoint) bar	Hex code, rgb, text etc
SPSearch	Show default SharePoint search box in the top bar or not	True/False
Header properties:		
SPMenu	Show SharePoint default menu or not	True/False
SPActionMenu	Show SharePoint action menu or not (e.g. following, share button)	True/False
SPHamburgerMenu	Show default SharePoint menu in mobile view or not	True/False
Greeting	Greeting shown before the staff name	There will be no greeting if left empty

Search properties		
injioSearch	Show Injio search box in header or not	True/False
searchOptionPrompt	Prompt search options after enter	True/False
staffDirectory	Show people option in Injio search box or not	True/False
Logo/Icon properties		
faviconUrl	Favicon location. Icon file must be named as 'favicon.ico'	URL starts with https://
mobileBookmarkIconUrl	Mobile bookmark icon location	URL starts with https://
logoUrl	Int ranet logo redirect link	URL starts with https:// (leave blank if not redirecting to homepage only)

logoBigger	Show logo in large size or not	True/False

Mega Menu properties		
megaMenu	Show mega menu or not	True/False
megaMenuUnderline	Show grey border line under mega menu or not	True/False
megaMenuAlignment	Control alignment of the drop down menu item	- leave blank to align left - ‘center’ to align center - ‘flex-end’ to align right
megaMenuColumnMaxWidth	Maximum width for dropdown columns	Number with px, e.g. ‘300px’
megaMenuColumnWidth	Minimum width for dropdown columns	Number with px, e.g. ‘300px’
megaMenuColumnSpacing	Padding left for dropdown columns	Number with px, e.g. ‘45px’

Magic links column properties		
feedbackButton	Show feedback button in magic links or not	True/False
magicLinks	Show magic links column or not	True/False
magicDocs	Show magic docs in magic links slideout or not	True/False
magicContacts	Show magic contacts in magic links slideout or not	True/False
magicLinksSquare	True: Square shaped items False: Round shaped items	True/False (magicLinksLabelInIcon also must be ‘true’ to show square icon, vice versa)

magicLinksLabelInIcon	True: show title within the icon False: show title under the icon	True/False
magicLinksColumnWidth	Width of magic links bar	Number with px, e.g. '40px'
magicLinksColumnShadow	Show shadow on the right of the magic links or not	True/False
magicLinksColumnColour	Color of the magic links bar	Hex code, rgb, text
magicLinksButtonIcons	Remove any of the following sections to hide from magic links	
Personal	Fabric ui icon for 'My stuff'	Fabric ui name (Available icons)
AddLink	Fabric ui icon for 'Add a link'	Fabric ui name (Available icons)
System	Fabric ui icon for 'System links'	Fabric ui name (Available icons)
Quick	Fabric ui icon for 'Quick links'	Fabric ui name (Available icons)
Additional	Fabric ui icon for 'Additional'	Fabric ui name (Available icons)

Font

contentEditorFontType	Default font style for text web part	Font style, e.g. 'Arial'
contentEditorFontColour	Default font colour for text web part,	Hex code, rgb, text, e.g. 'Navy'
contentEditorFontSize	Default font size for text web part	Number with px, e.g. '20px'
contentEditorFontWeight	Default font weight for text web part	Number, e.g. '500'
contentEditorFontType	Default font style for text web part	Font style, e.g. 'Arial'

Map Properties		
contentEditorFontType	Default font style for text web part	Font style, e.g. 'Arial'
contentEditorFontColour	Default font colour for text web part,	Hex code, rgb, text, e.g. 'Navy'
contentEditorFontSize	Default font size for text web part	Number with px, e.g. '20px'

Others		
googleAnalyticsCode	Connect SharePoint Usage with Google Analytics	Place google tracking ID here

Injio Modules

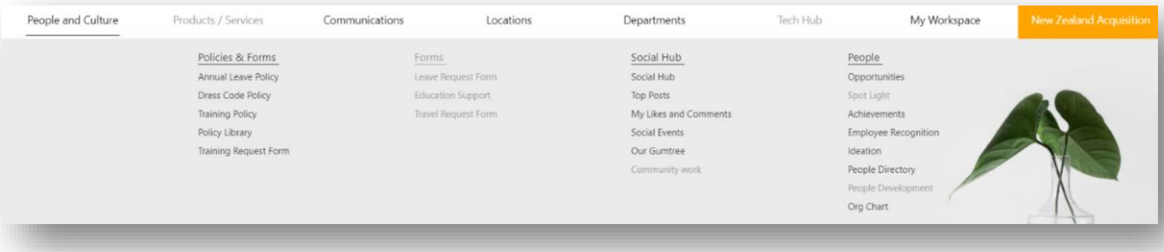
Mega Menu

The Mega Menu is where all the top menu items reside across the entire intranet. A menu item that has one or more Region tags (if these have been added) is only visible to the local users. It can have up to 3 tiers with a maximum of-

For tier 1 - Maximum 8 Tabs

For tier 2 - Maximum 5 Columns

For tier 3 - Maximum 8 Items



Features

- This is the main menu containing navigation items
- Can be linked to different pages on/outside the Intranet
- Can be customised as required, including background images as pictured

Configurations

Data Source: Site contents > ‘Mega Menu’

[How to add menu items]

[How to config menu colors]

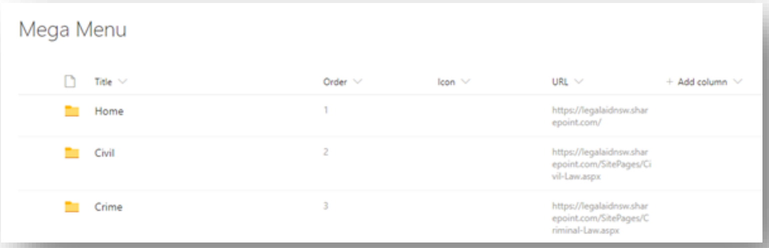
[How to add UI Fabric Icons (Icons from Microsoft)]

[How to add a custom image as an icon]

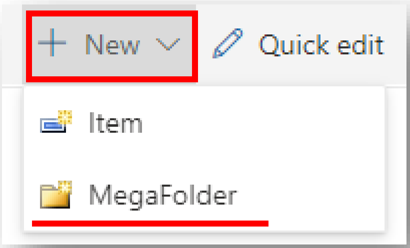
[How to rename mega menu items]

How to add menu items

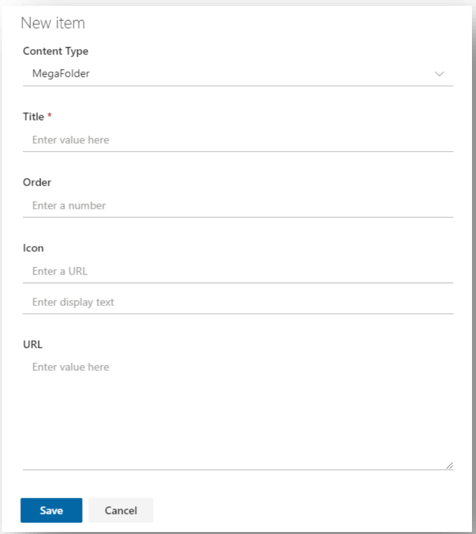
1. Go to Site Contents > Mega Menu. The top-level folders contain the first-level menu items



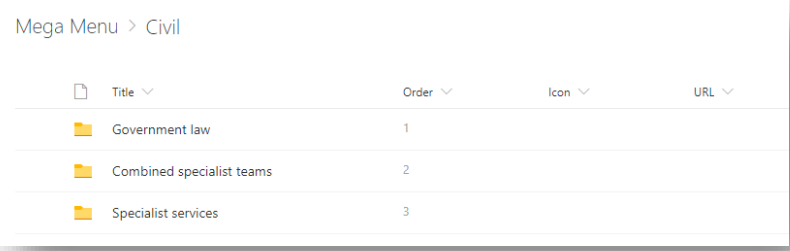
2. To add a new folder, click ‘ + New ‘ > ‘MegaFolder’



3. Enter all the details



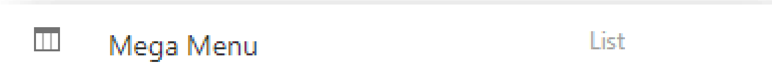
4. Click the first level folder to go to the second level menu items. Use the same approach as above to add new folders



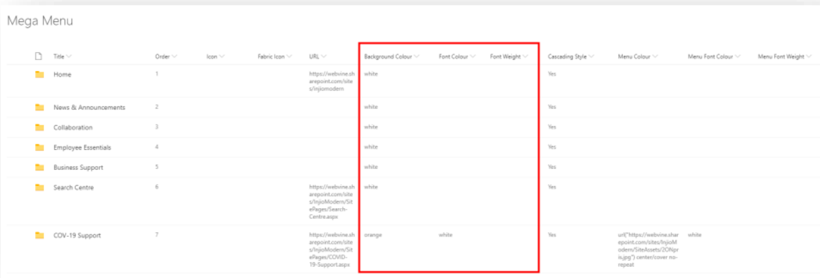
5. Click the second level folder to go to the third level menu items. Click ‘New’ > ‘Item’ to add a new link to the menu. If it is a document, a corresponding icon is shown on the mega menu

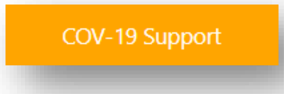
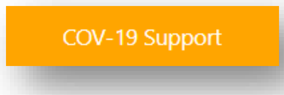
How to config Menu colours

1. Go to Home Page > Settings > Site contents > ‘Mega Menu’ list

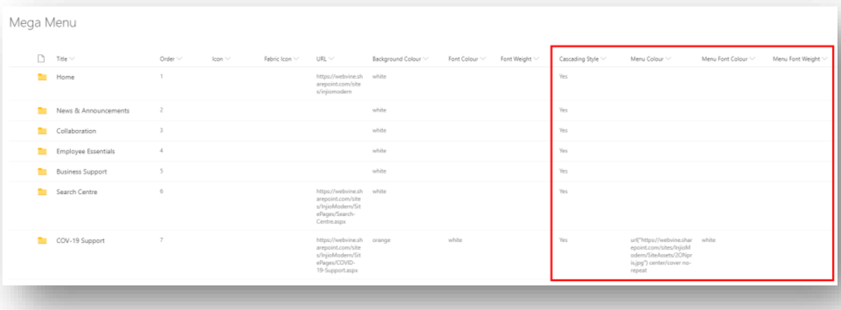


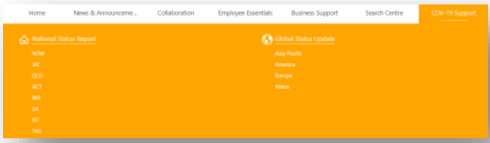
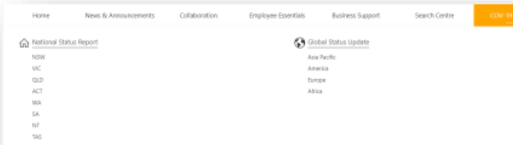
2. Controlling colours of top-level individual item



Columns	**Options**	**Examples**
Background color	- Text - hex code - RGB - RGBA	Orange 
Font size	Text	16px
Font Color	- Text - hex code - RGB - RGBA	#ffffff 
Font Weight	Values between 400(default, normal) to 700(bold)	- *leave blank* -default - 600 
Font Shadow	Text	1px 1px #bdbdbd

3. Controlling colours for drop down menu items



	Options	Examples
Cascading Style	Yes 1. (with menu color, font color, font weight columns empty) inherit color settings from top level 2. assigning different colors/background to dropdown items No (default) *NOTE: No stylings will apply to the dropdown items*	Yes   No 
Menu Color	Background colors - Text - hex code - RGB - RGBA	rgba(255,165,0,0.82) 
	Background image- Replace image URL and paste it in the cell	url("https://webvine.sharepoint.com/sites/InjioModern/SiteAssets/20Npris.jpg") center/cover no-repeat 

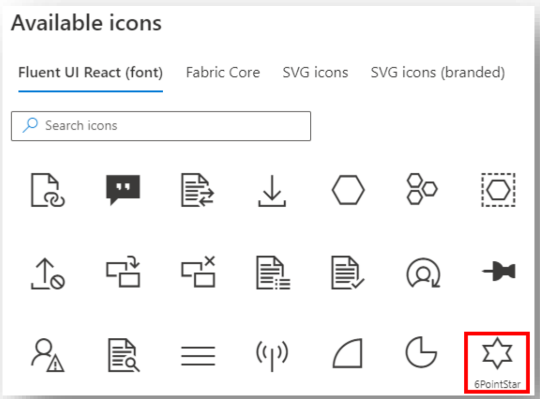
Menu Font Color	- Text - hex code - RGB - RGBA
Menu Font Weight	Value between 400 (default, normal) to 700 (bold)

How to add UI Fabric Icons (Icons from Microsoft)

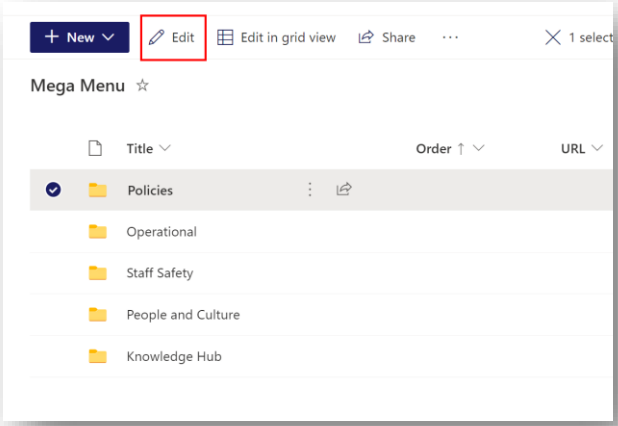
Microsoft provides a wide range of icons that can be used as icons for mega menu items (only for second-level mega menu items: sub-folders, and mega menu items)

The icons can be accessed from the Office UI Fabric Icon website - https://developer.microsoft.com/en-us/fluentui#/styles/web/icons#available-icons

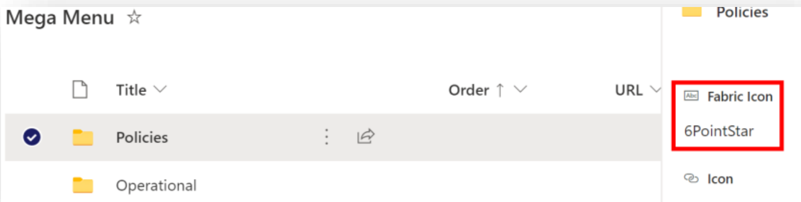
1. Select the icon you'd like to add to the Mega menu item.
   For example, if you'd like to use the below selected icon as the logo, note the name of the icon. In this case, it is '6PointStar'



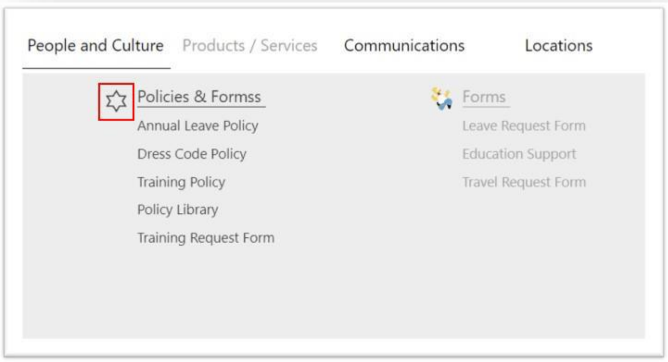
2. Select the Megamenu sub-folder/ item that you'd like to add the icon to and click 'Edit'.



3. Type the name of the chosen icon under the ’Fabric icon' column then click on ’Save' at the bottom.



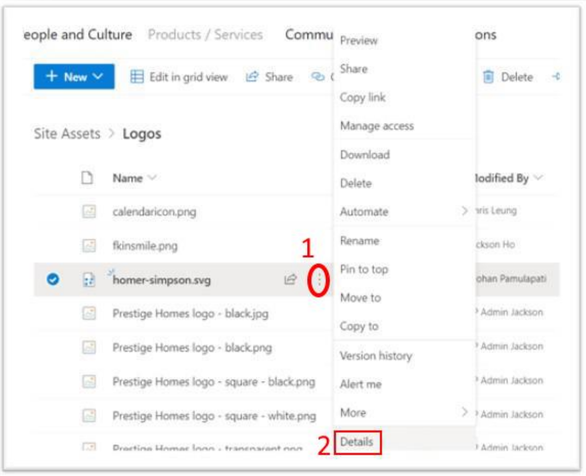
4. Refresh the page, and the logo will appear on the Megamenu.



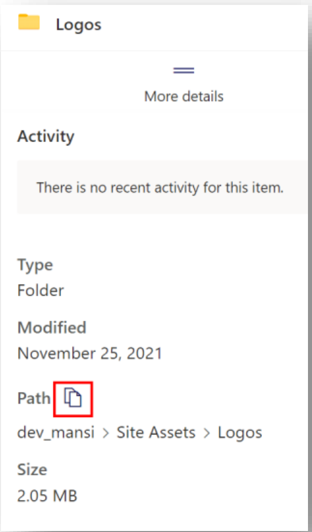
How to add a custom image as an icon
Note: only images with a '.svg' file type can be added as logos for the mega menu

1. Upload an '.svg' file to Site Contents > Site Assets > 'Logos' folder

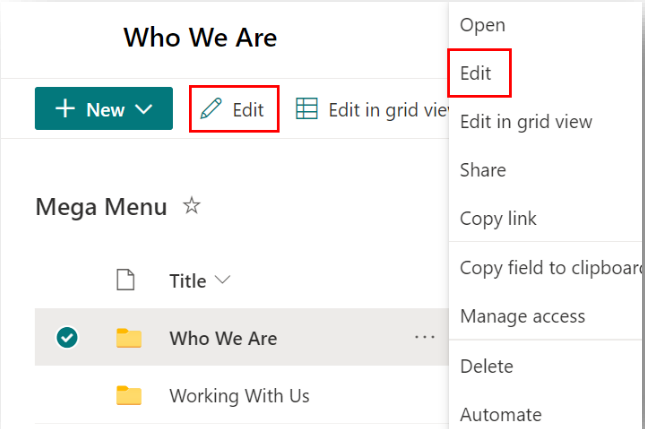
2. After the file has been uploaded > click on the ellipses > click on 'Details'



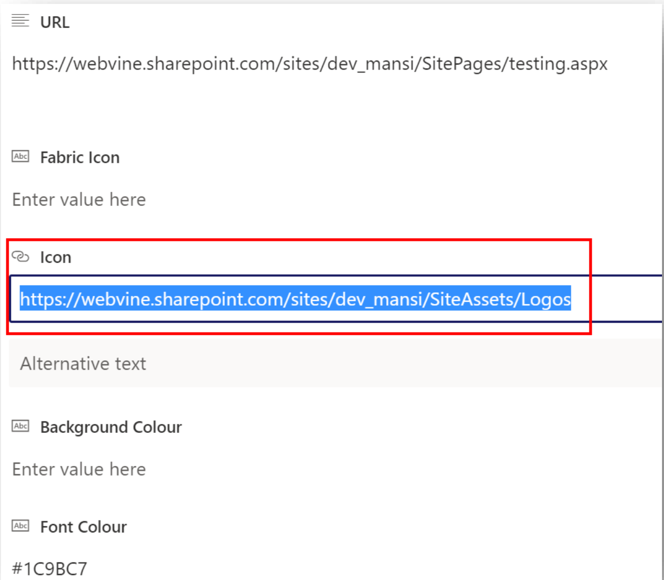
3. 'Details' pane > locate the 'Path' field > and click on the copy symbol. This will copy the image's relative URL to your clipboard.



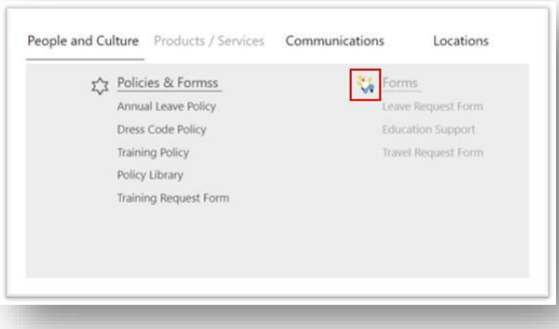
4. 'Site Contents' > 'Mega Menu' list > select the item/sub-folder of choice and click on 'Edit'



5. Paste the copied link in the 'Icon' column and click to the side to Save

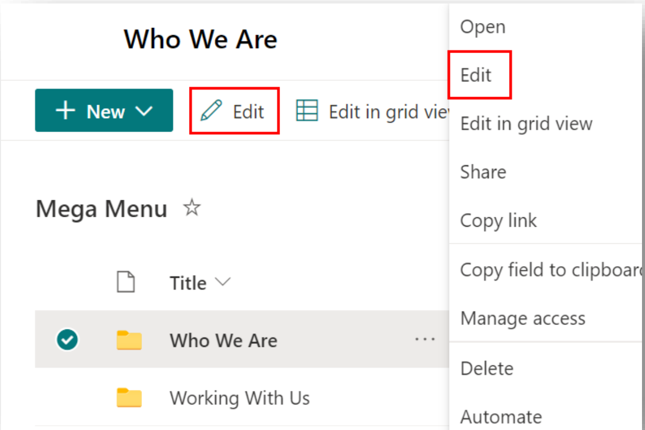


6. Refresh the page, and the image will be added as logo for the Megamenu item/sub-folder

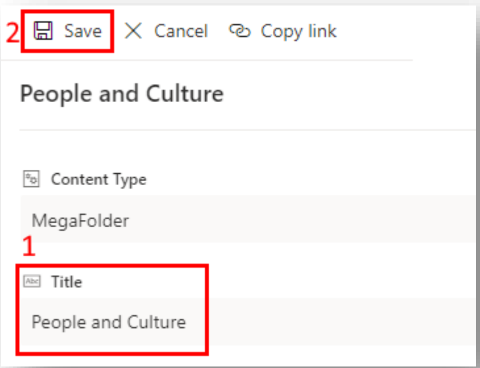


How to rename menu items

1. Navigate to 'Site Contents' > 'Mega Menu' list > select the item/sub-folder of choice and click on 'Edit' in either places

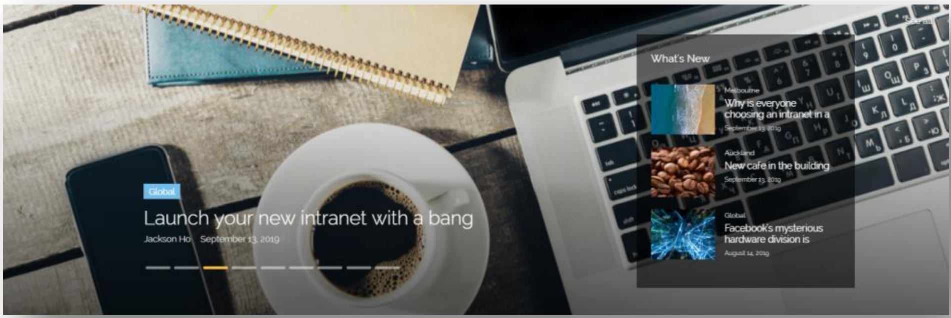


2. Edit the item name in the "Title" space and click on "Save" to finish

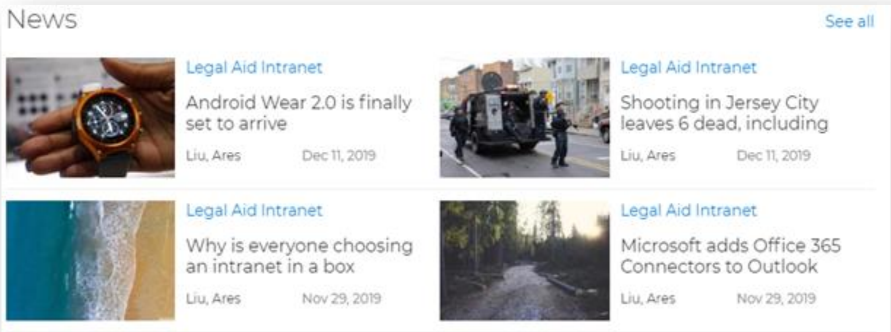


News

This section is for news articles and in most cases this module is featured on the homepage. Articles are usually accompanied by a photo or illustration. The module can be displayed in different styles. The news title eg "Launch Your Intranet Site With a Bang" will display on the home page. Clicking on this will deliver the user to the full news article.



Homepage News option

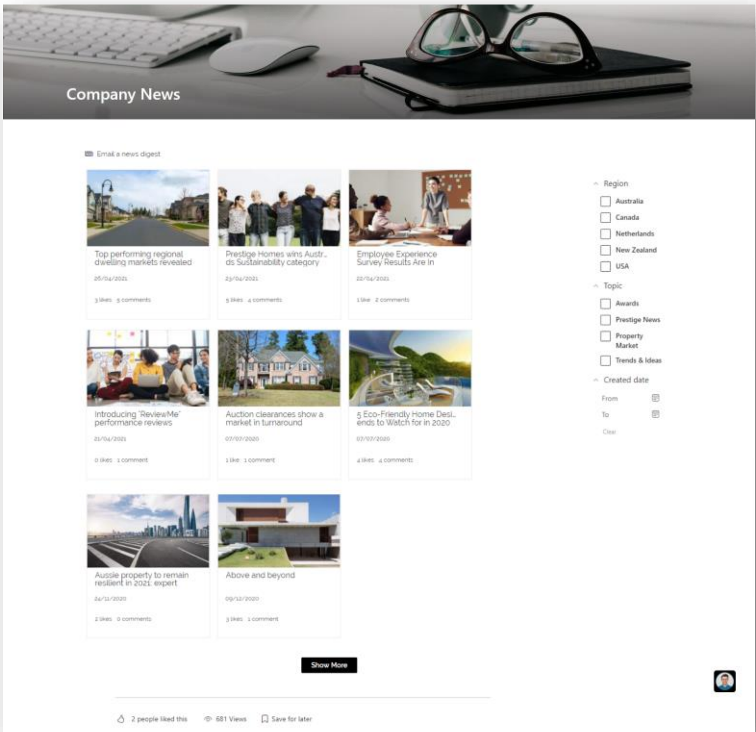


Features

1. Show customised numbers of published news items
2. Show the news category, title, author, published date
3. Click on the news title to go to the news details page

4. Click on ‘See all’ to go to the All-News page

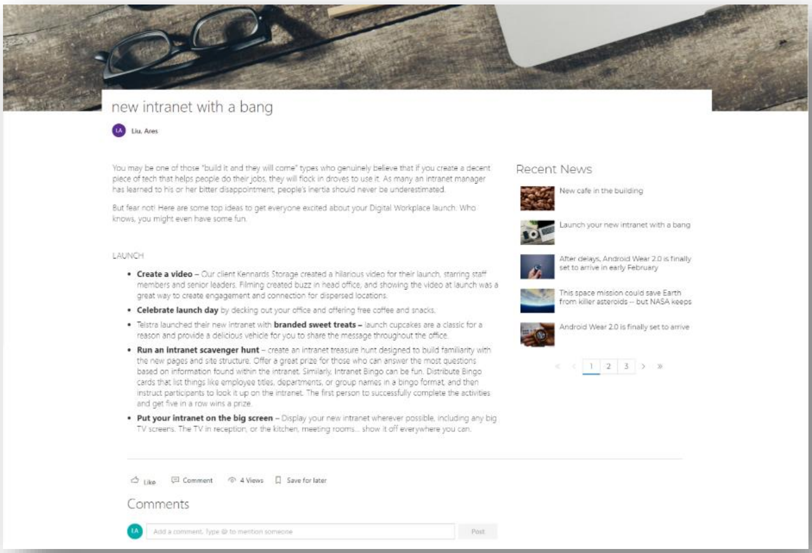
News landing page



Features

1. The News landing page shows by default all the published news– sorted by published date in descending order
2. ‘Email a news digest’ enables users to share multiple news in one email
   Note: ‘News Digest’ must be toggled on in News webpart settings
3. Filter button with customisable filter values, e.g., Created date
4. On each News card, you can view the Title, Author, Published date, Number of likes and comments
5. Click the News card to navigate directly to the news details page
6. Click Show More to load more news cards

News Detail page



Features

1. Shows the details of the selected News in the left section and recent News in the right section
2. Shows the number of likes, comments, and shares of the news
3. User can like, comment, or share the news and like or reply to the comments

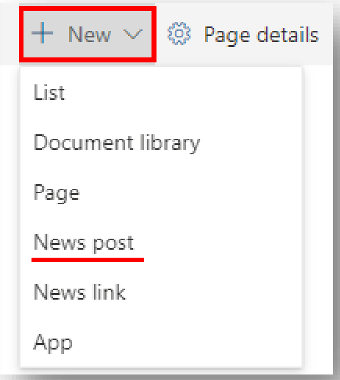
Configurations

Data Source: Site contents > 'Site Pages' > Promoted State '2'

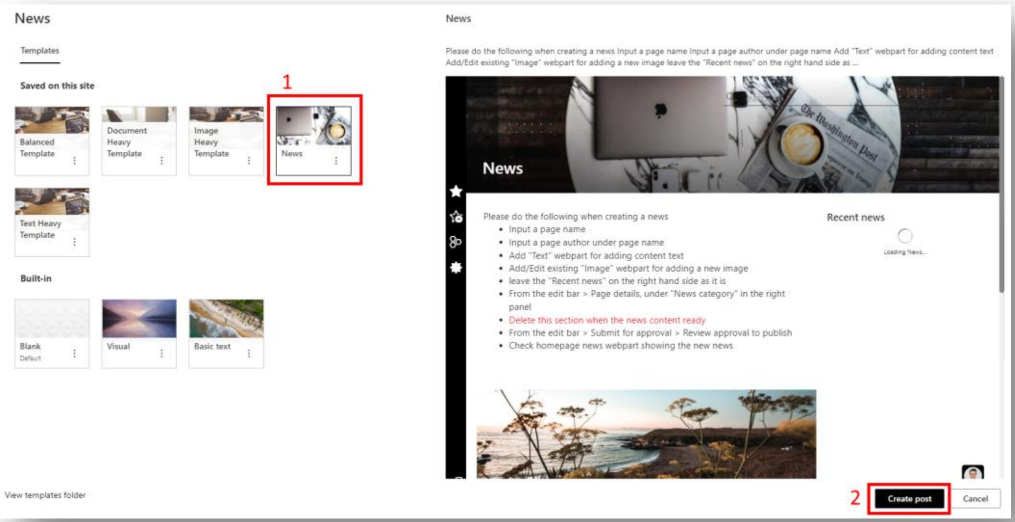
[How to create News](#)
[How to edit a News page](#)
[How to delete a News page](#)
[How to config the News web part](#)
[How to schedule a News Item](#)

How to create News

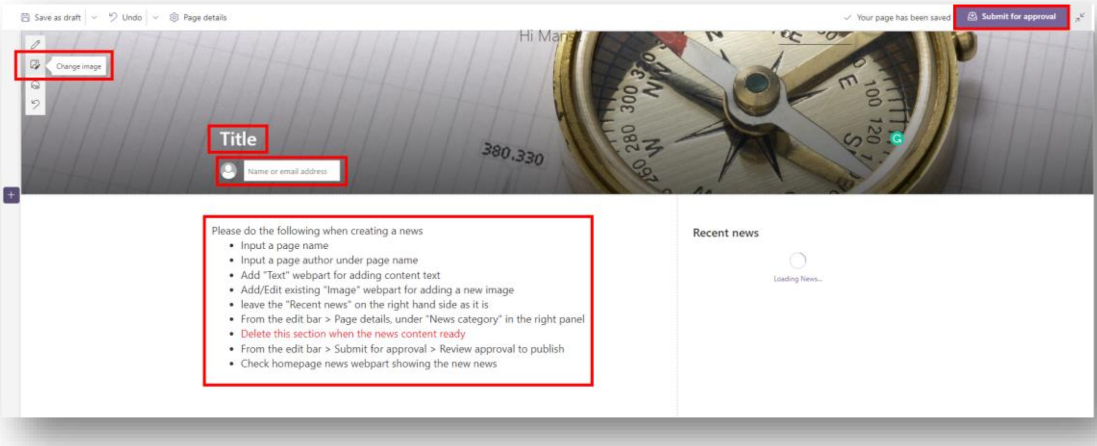
1. Click on '+New' on any site page > 'News post'



2. Select 'News' template if available > 'Create Post'



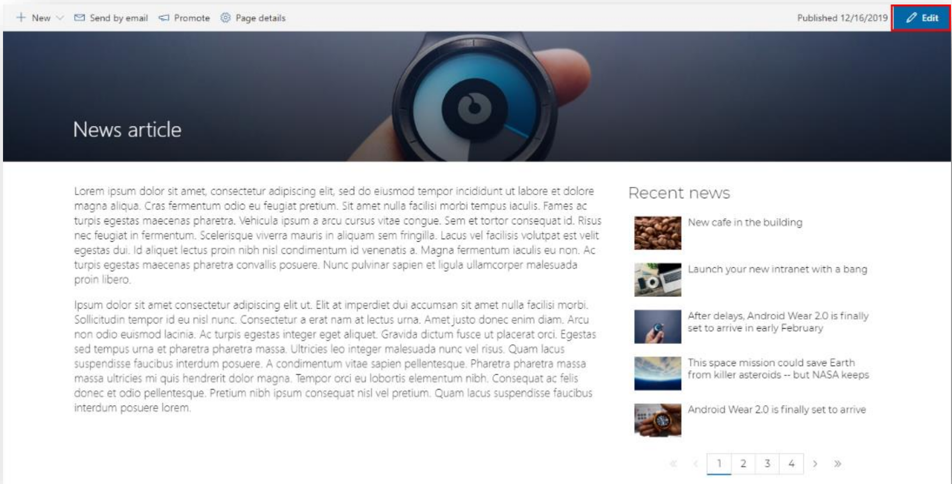
3. Fill in all the details- 'Title', 'Author' (optional), 'Body' and assign a banner image (optional)



4. If no image is provided, the default image can be chosen from the news template
5. Click on ‘Save as draft’ in the upper left to save
   Note: The page will not show up on the All-News page or Homepage until published.
6. News Authors will not see the ‘Publish’ button, only the ‘Submit for Approval’ button will be visible. An email will be sent to all members in the News Approvers group to review.
   Note: Members in the News Approvers group can publish the post directly.

How to edit a News page

1. Navigate to ‘Site pages’ library
2. Settings > Site Contents > Site pages
3. Navigate through the library to find the post and click to open the page
4. Click on the ‘Edit’ button to edit the news page.

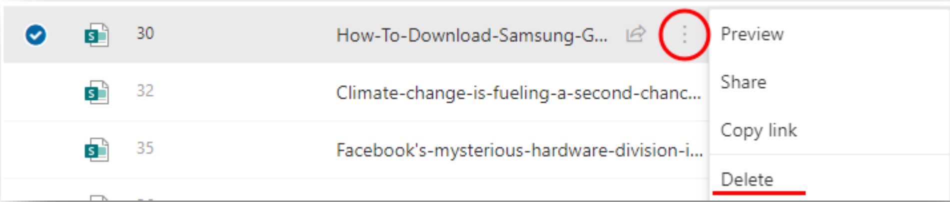


5. Edit the fields as required and 'Submit for Approval' or 'Publish' the page

How to delete a News page

1. Navigate to the 'Site pages' library

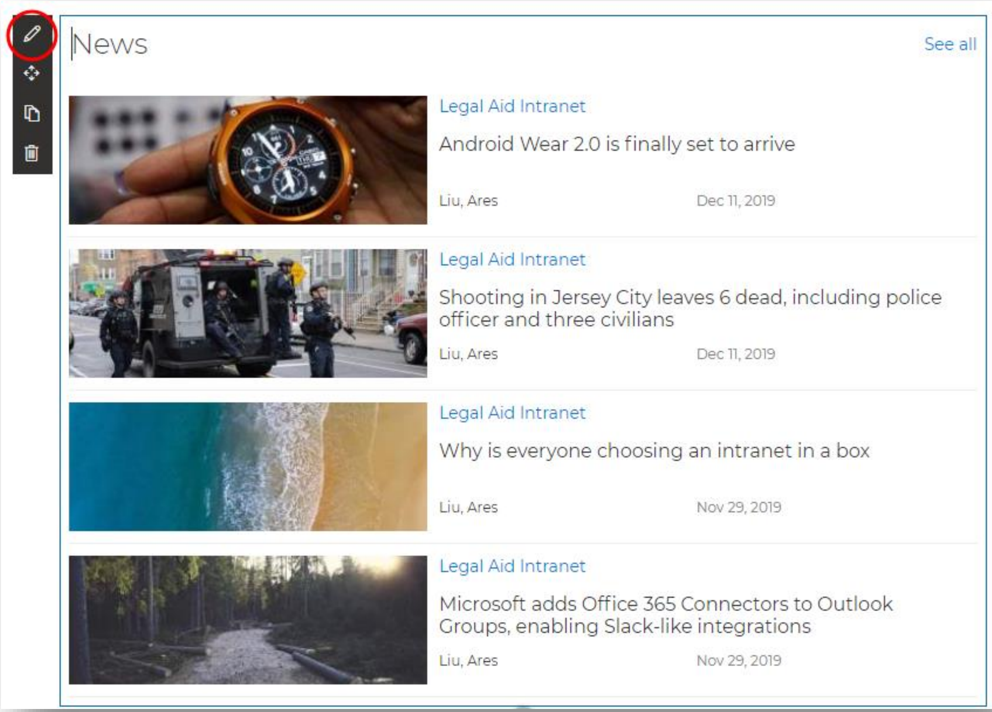
2. Select the News item to delete > click on the ellipses > 'Delete'



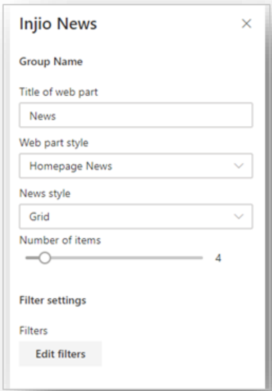
How to config the News web part

1. Navigate to the page containing the news webpart > Click 'Edit'

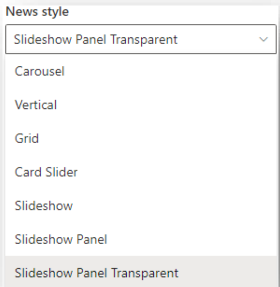
2. Select the webpart and click on the pencil icon to edit



3. Edit the properties in the menu on the right

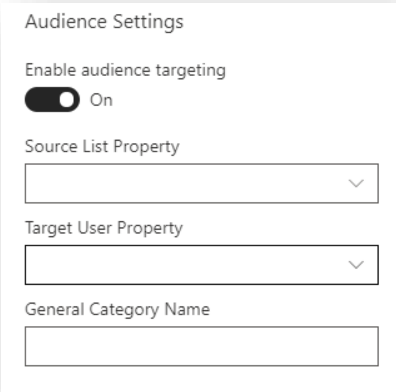


Title	**Title of the web part**	User can name the title	

Web part style	**Web part style**	User can choose the style from the drop-down list. E.g., All News, Homepage News*, Recent News	
Display style	**News style**	User can choose which style to have. E.g. Carousel, Vertical, Grid	

Note: Web part style for homepage must be 'Homepage News'

4. Enable audience targeting – Toggle to 'On' to select the category from SP admin or AD admin



Source list Property	Choose a list field to match with SharePoint user profile property
Target User Property	Choose a SharePoint user profile property to match with the selected list field

General Category Name	The category that show for all users, e.g. General

5. Edit refiner to filter the News items to show

   Note: Please refer to section 1.17 Refiner in this document to configure Refiner

How to schedule a News Item

Method 01: Using the Scheduled Publish Date column in the Site Pages list

1. Click on 'Edit' on the page that contains the Injio News webpart
2. Click on the pencil icon on the webpart to configure the webpart settings

News Category	Page Category
Sorted by	Scheduled Publish Date

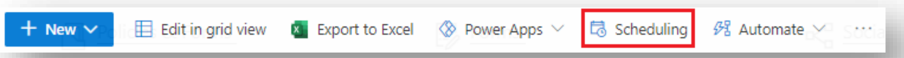
3. Go to Site contents > Site pages
4. Click on Edit in grid view > Select Site page > edit 'Scheduled Publish date' column and enter the date that you want the page to be published.

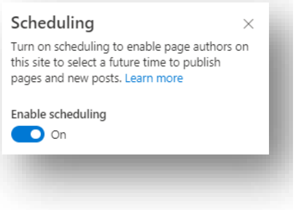
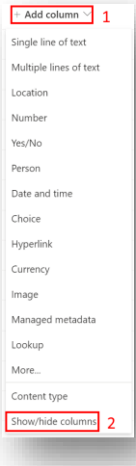
   Note: Please note that the news page should be approved after scheduling a date to publish. Also, the Injio News web part does not currently support scheduling by time, but the pages go live on a scheduled date at 12 AM

Method 02: Using the Publish Start Date column

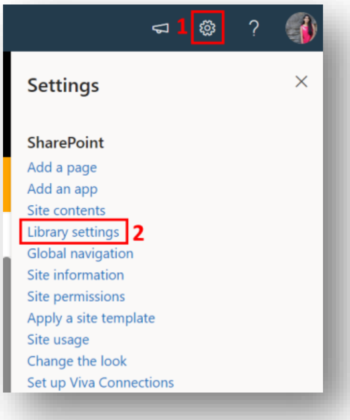
Note: This method can only be used for Site pages and News Items but not for Announcement Items, and eliminates a drawback of method 01, where pages cannot be scheduled to go live at a particular time.

1. Site Contents > Site Pages
2. From the menu option, turn on 'Scheduling'



Enable Scheduling	Toggle ‘Enable Scheduling’ on in the popup menu	
Add column	From the ‘Show/Hide columns’ settings under ‘+ Add Column’ menu	

3. Hide (uncheck) ‘Scheduled Publish Date’ column and add (check) ‘Publish Start Date’
4. Site settings > Library settings

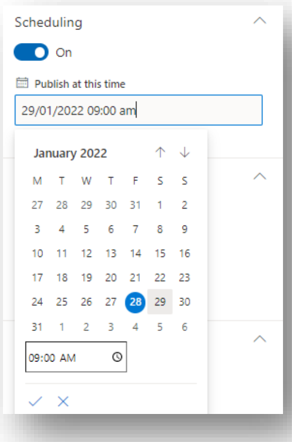


5. Under the ‘Content Types settings’, click on ‘Site pages’ and remove ‘Scheduled Publish Date’ column and add ‘Publish Start Date’ if not present already

Scheduling a News Item/Site page with Method 02

1. Create a News item (refer to ‘How to Create News’)

2. After making required changes to the News/Site page and before publishing the changes, under ‘Edit’ mode, click on ‘Page details’ from the top menu bar and turn Scheduling ‘ON’ and enter a date & time for publishing the page

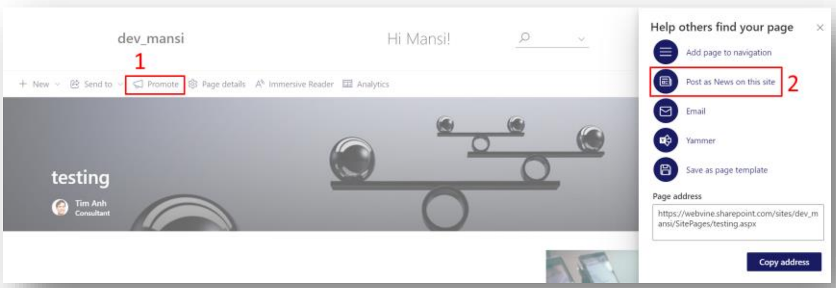


Note:

   i. *If Scheduling is not turned on the page will go live right away*

   ii. *If a page is published right away by mistake, under edit mode, follow the above steps to schedule the page.*

3. To post a new page as a News item, after scheduling and publishing the page, select the ‘Promote’ option from the top menu bar for the page, and select ‘Post as News on this site’ option.



4. The page will be posted as a News item at the scheduled time.

Note: Method 2 only works for News Items and Site Pages NOT for Announcements

   i. *The column ‘Scheduled Publish Date’ should only be deleted for Content Type- Site Pages and NOT in Columns*

News Ticker

This module is a scrolling view of important messages to be shown on the Intranet. These can be News, Announcements or other items

Homepage News Ticker

Features

1. Show customised number of items
2. Customisable color and text for the webpart title
3. Able to show item title and one line summary for each item
4. Hover on the item to stop the news ticker scrolling
5. Click to open a pop up to show the details
6. Show in different category colors

News Ticker detail page

Features

1. Show the title, description and created date of the selected item

Configurations

Data source: Site contents > ‘Newsticker’

Category source: Site contents > ‘Newsticker_categories’

[How to create a News Ticker item](#)
[How to edit a News Ticker item](#)
[How to delete a News Ticker item](#)
[How to config the News Ticker web part](#)
[How to upload an image for the tile](#)

How to create a News Ticker item

For News

1. User can set ‘Show On News ticker’ to “Yes” through page details when creating the news

Or

1. ‘Site Content’ > ‘Site Pages’
2. Select the news that you would like to show in the news ticker
3. Click on the ellipses > ‘More’ > ‘Properties’
4. In the right panel, under ‘Show On Newsticker’ > select ‘Yes’
5. Open the news and publish it again

For Announcements or News ticker list

1. ‘Site contents’ > choose the list you want to use e.g. announcements
2. Click to open the form to create a new item
3. Fill in the required fields and ‘Save’

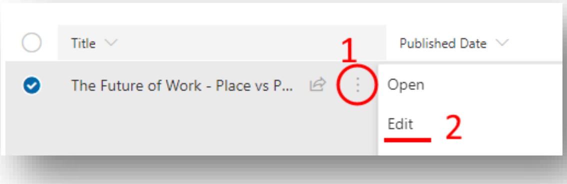
How to edit a News Ticker item

For News

1. ‘Site Contents’ > ‘Site Pages’ to edit the news item

For Announcements or News Ticker list

1. ‘Site Content’ > Navigate to the list
2. Select the item you want to edit
3. Click on the ellipses button > ‘Edit’



4. Edit the item and Save

How to delete a News Ticker item

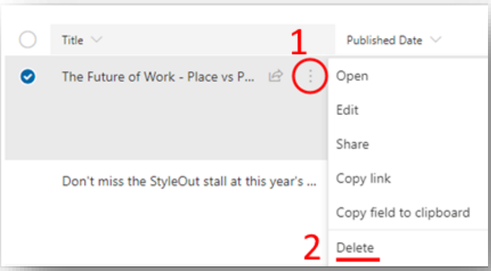
For News

1. Go to ‘Site Content’ > ‘Site Pages’
2. Select the news that you would like to remove from the news ticker
3. Click on the ellipses > ‘More’ > ‘Properties’
4. In the right panel, under ‘Show On Newsticker’, select ‘No’
5. Open the news and publish it again.

For Announcements or News Ticker list

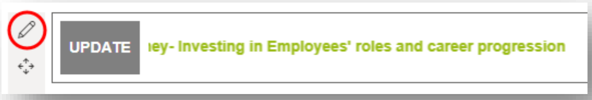
1. Go to ‘Site Content’ > Navigate to the list
2. Select the post you want to edit
3. Click on the ellipses button > ‘Delete’

Note: For announcements, the items will also be deleted from announcements web part

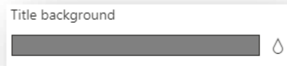
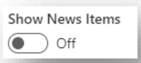


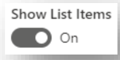
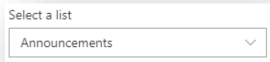
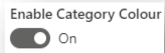
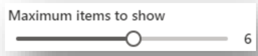
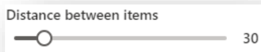
How to config the News Ticker web part

1. Navigate to a page with the Newsticker webpart and edit the page
2. Click on the News web part > click on the pencil icon to edit



3. A property panel will appear on the right. User can edit the properties here to change the News Ticker layout

Title	**Title**	User can choose a title of their choice	
Title Background	**Title Background**	User can choose a colour of their choice	
Font Size	**Font Size**	Use slider to select font size	
Font Weight	**Font Weight**	Use slider to select Font weight	
Show News Items	**Show News Items**	Toggle 'On' to show News items	

Show List Items	**Show List Items**	Toggle ‘On’ to show List items	
List	**Select a list**	Select the list from the drop-down menu	
Enable Category Color	**Enable Category Color**	Toggle ‘On’ to enable color from Category list	
Maximum items	**Maximum items to show**	Use slider to select maximum number of items to show	
Distance between items	**Distance between items**	Use slider to select distance between items	

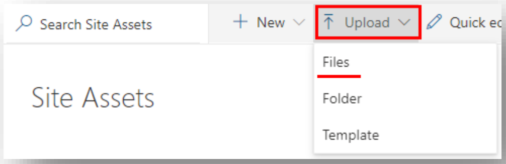
4. Close the panel and publish the page to save

How to upload an image for the tile

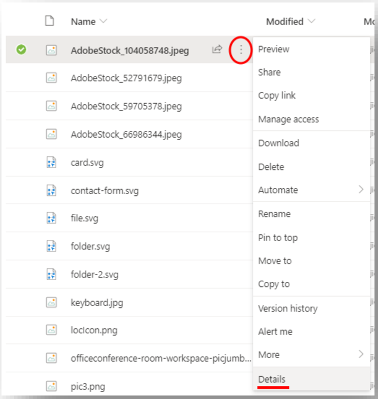
This section uploads the image as a background for the tile

1. ‘Site Content’ > ‘Site Assets’

2. Create a folder in the list and name it E.g. Tile_Images for easy access
3. Click ‘Upload’ > ‘Files’



4. Choose the File to upload > 'OK'
5. Click on the ellipses next to image title > Details



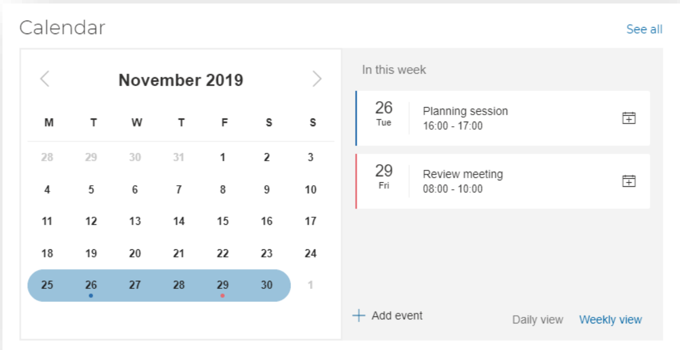
6. In the right panel, scroll down to find 'Path' section
7. Click the 'Copy' button to copy the image link

8. Paste the link to the Background URL as a background image for the tile

Events Calendar

This module is a collection of all Calendar events. The module can be displayed in different styles.

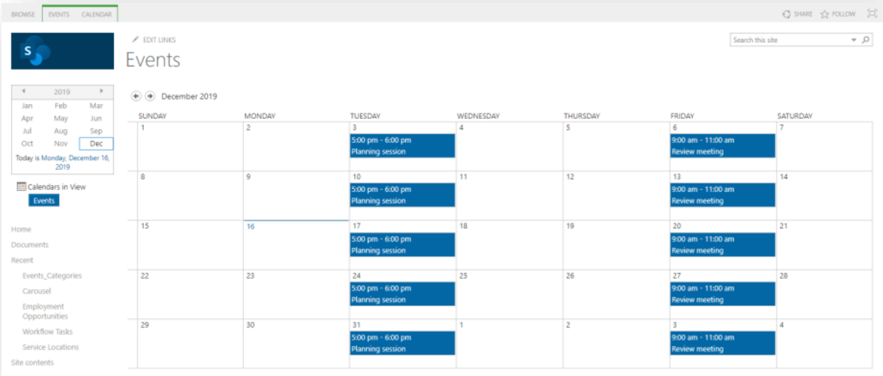
Homepage Events



Features

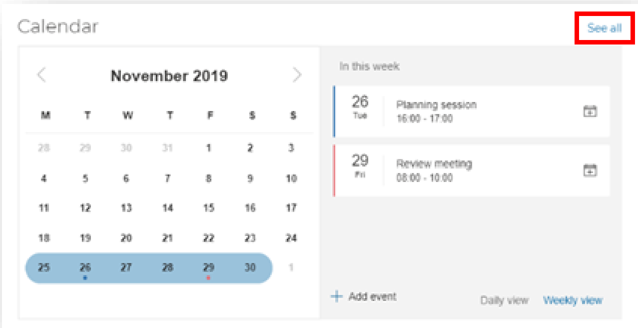
1. Show daily/weekly events in an ascending order of event time
2. Click on a date on the calendar to show a list of events for the day/week on the right (depending on the current view)
3. Click on the date of an event to show more information of the event, e.g. Location and organiser
4. Calendar icon button allows user to add the event to their outlook.
5. Click '+ Add event' to open a new event form
6. Click 'See all' to go to the calendar view

Calendar view page

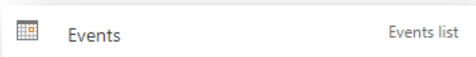


Features

1. This page can be accessed in two ways
    - 'See all' button on the Calendar webpart

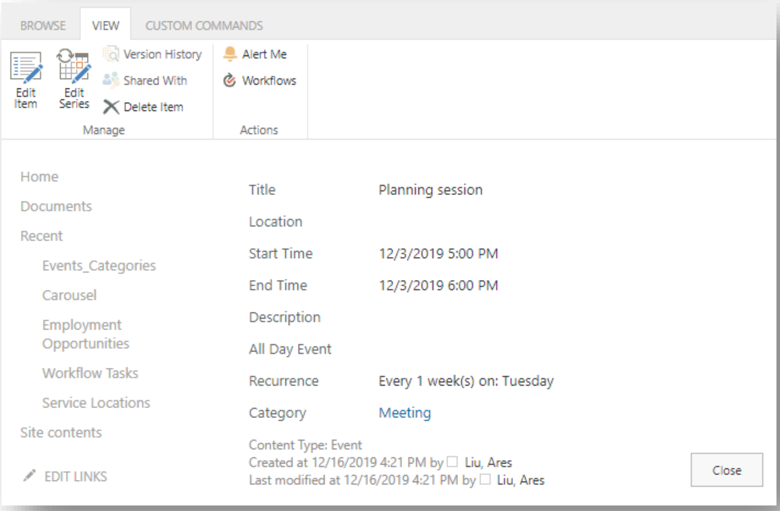


    - Site Contents > Events list



2. Shows the events in a monthly calendar view
3. Click from the small calendar to pick the month to view
4. Click on the event name in the calendar to open the detail page of the event

Event details page



Features

1. Shows all the details of an event
2. From top ribbon menu bar
    - Click 'Edit Item' to edit the individual event
    - Click 'Edit Series' to edit the event series
    - Click 'Delete Item' to delete the event

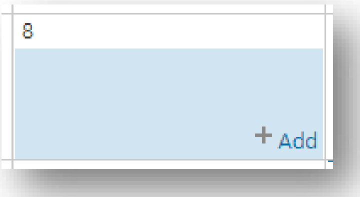
Configurations

Data source: Site contents > ‘Events’

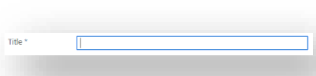
[How to create an Event from Events page](#)
[How to config the Calendar web part](#)
[How to add a new category to the existing list](#)
[How to add an Event to Outlook Calendar](#)
[How to sync a SharePoint Calendar to Outlook](#)
[How to create a new Calendar](#)
[How to create a new Event Category list](#)

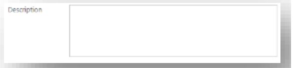
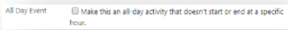
How to create an Event from Events page

1. Navigate to Calendar page (can be accessed using ‘See all’ button on the events wepart)
2. From the calendar view, on a specific date, click ‘+ Add’ to open a new event form



3. Fill in all the necessary fields

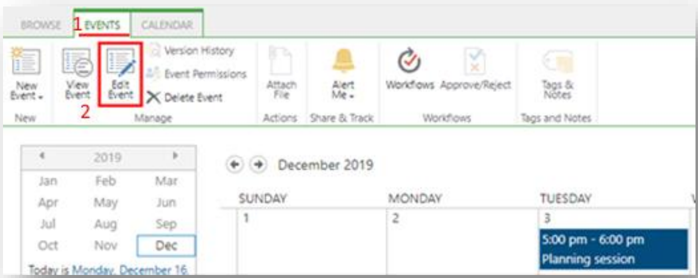
Title	**Title**	Users can give a title of their choice	
Location	**Location**	User can give a location of their choice	
Time	**Start Time**	Start time of the event	
Time	**End Time**	End time of the event	

Description	**Description**	Description of the event	
All Day Event	**All Day Event**	Check the box if the event is a full-day event	
Recurrence	**Recurrence**	Set recurrence using this option	
Category	**Category**	Select a category from the drop-down menu	

4. Click ‘Save’ to save event

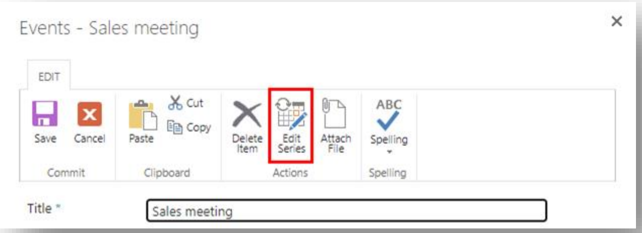
How to Edit one single Event

1. On the calendar view page, click on the ‘EVENTS’ block (not on the title) from top ribbon bar > ‘Edit Event’

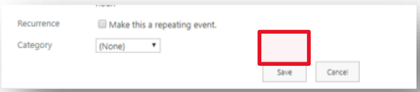


How to Edit Recurring Events

1. On the calendar view page, click on the ‘EVENTS’ block (not on the title) from top ribbon bar > ‘Edit Event’
2. In the pop up window, click ‘Edit Series’

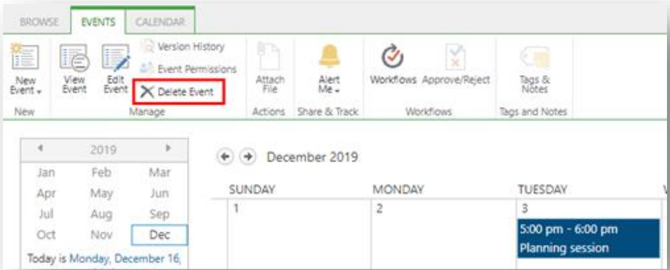


3. Edit the necessary fields and click ‘Save’



How to Delete one single Event

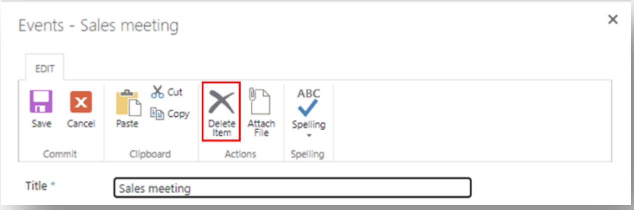
1. On the calendar view page, click on the ‘EVENTS’ block (not on the title) from top ribbon bar > ‘Edit Event’



How to Delete Recurring Events

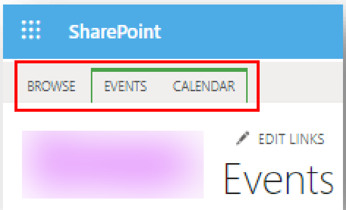
1. On the calendar view page, click on the ‘EVENTS’ block (not on the title) from top ribbon bar > ‘Edit Event’
2. In the pop-up window, click ‘Edit Series’

3. Click ‘Delete Item’

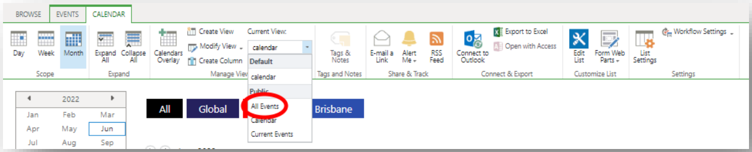


How to Delete Events in Bulk

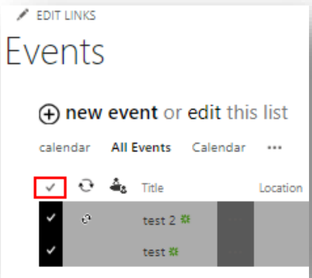
1. On the calender view page click on any date to reveal top menu



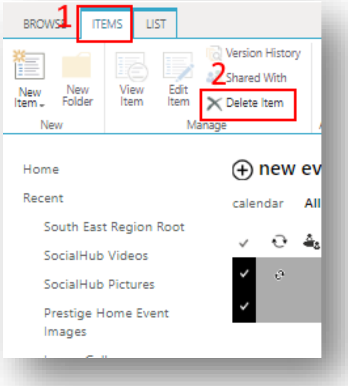
2. Click on ‘Calendar’ > select ‘All Events’ under ‘Current View’



3. Click on the ‘✔’ symbol to select all events

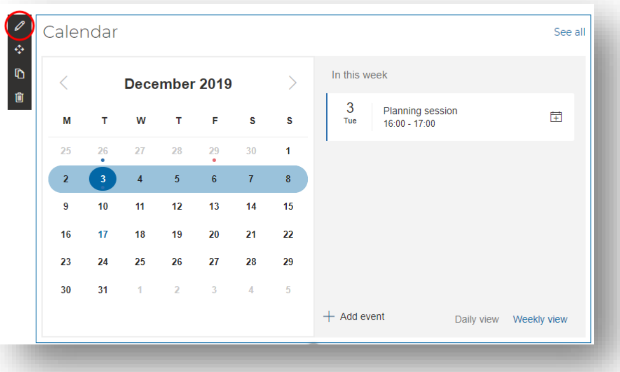


4. Click on ‘Items’ in the top bar > ‘Delete Item’



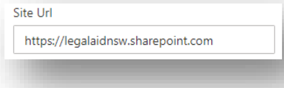
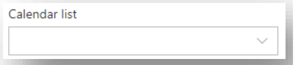
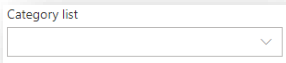
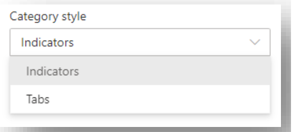
How to config the Calendar web part

1. Go to the page that contains your Calendar web part (likely the home page) > Edit page
2. Edit Calendar webpart using the pencil icon

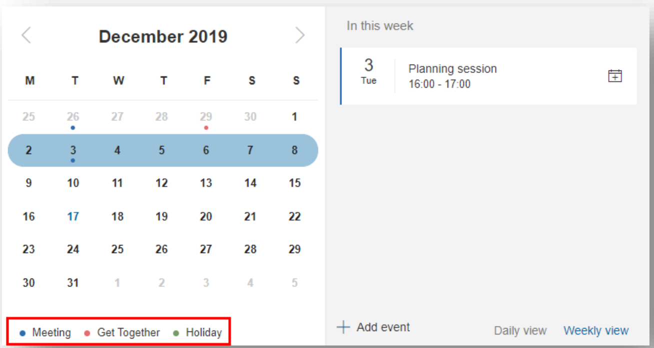


3. A property panel will appear on the right

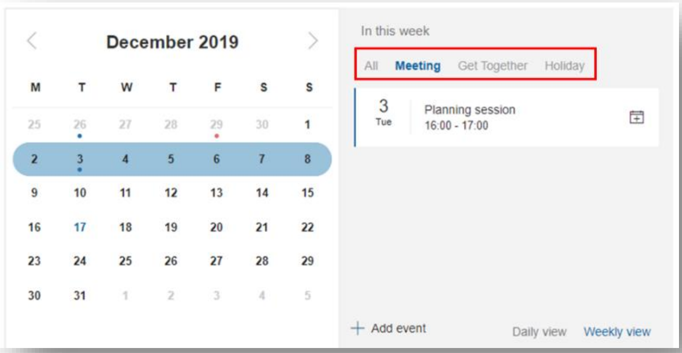
Title	**Title of web part**	User can give a title of their choice	
Site URL	**Site URL**	URL of the intranet	

			
Calendar list	**Calendar list**	Select the ‘Events’ list from the drop-down menu	
Category list	**Category list**	Select the ‘Events_Category’ list from the drop-down menu	
Category style	**Category style**	User can select the style in which their categories can appear E.g., Indicators*, Tabs**	

*Note: *Indicators: Event types show under the calendar view and the indicators show under individual dates*

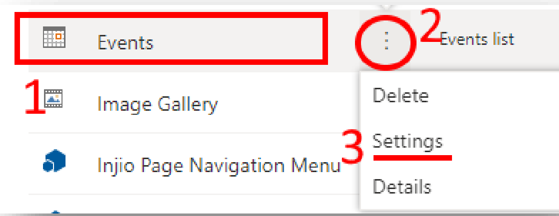


***Tabs: Event types show as tabs above the event list*

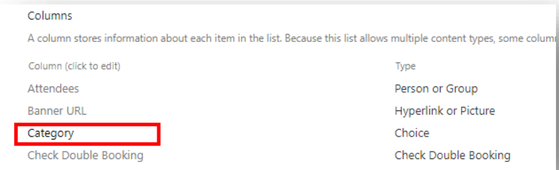


How to add a new category to the existing list

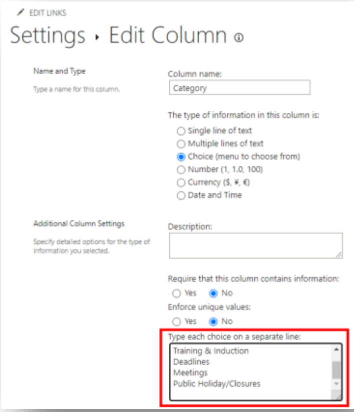
1. Navigate to ‘Settings’ > ‘Site Contents’
2. ‘Events’ > click on the ellipses and select ‘Settings’



3. Click ‘Category’ under Columns

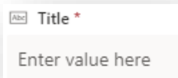
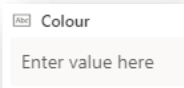
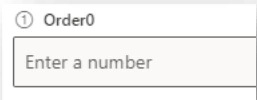


4. Add new category to choice



5. Click ‘OK’ to save
6. ‘Settings’ > ‘Site Contents’
7. Click ‘Events_Categories’ to open the list

8. Click ‘+New’ to add new Category

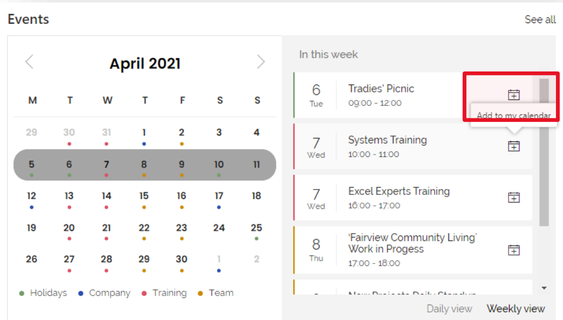
Title	**Title**	User can give title of their choice	
Color	**Color**	User must give hex code of color	
Order	**Order**	User can give order of the categories	

Attachments	**Attachments**	User can add images to the categories	

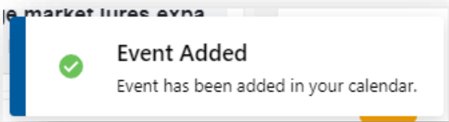
Note: The category for 'Events' and 'Events_Categories' must be exactly the same (case-sensitive) in order to have it show as an option for a new event

How to add an Event to Outlook Calendar

1. Click 'Add to my calendar' icon next to an event



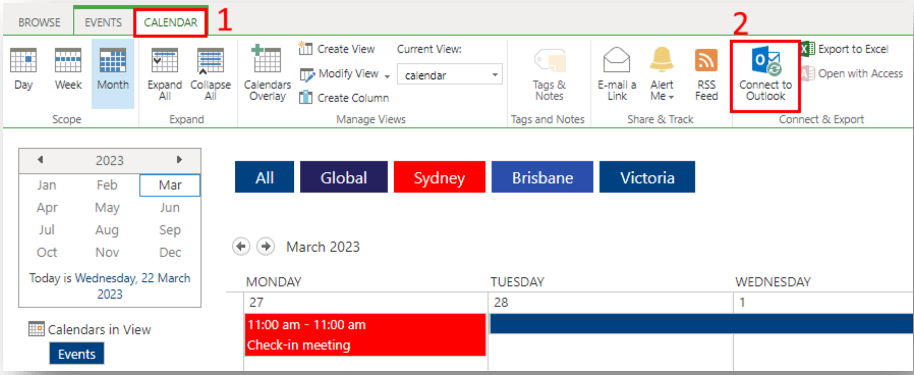
2. There will be a message showing on the bottom right corner to indicate an event is successfully added to the calendar



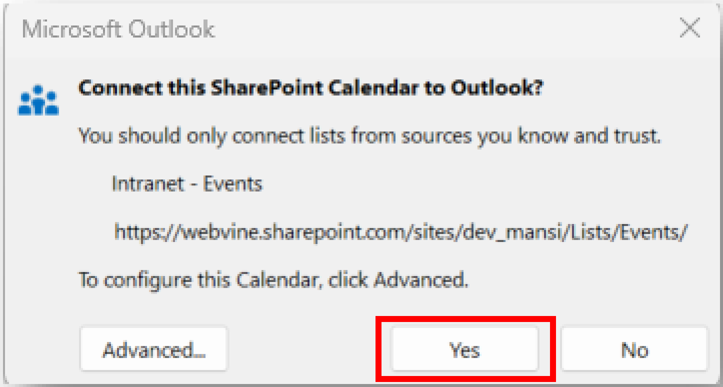
How to sync a SharePoint Calendar to Outlook

Note: It can only be synced to the desktop Outlook app, not to Outlook online

1. In the Calendar view page, click on the background of an event to show the top ribbon
2. From top ribbon, choose the 'CALENDAR' tab > 'Connect to Outlook'

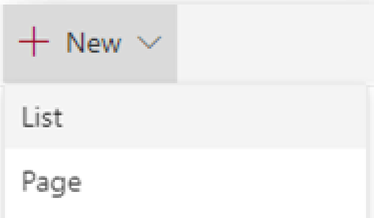


3. A pop-up window will appear to confirm syncing > Click Yes.

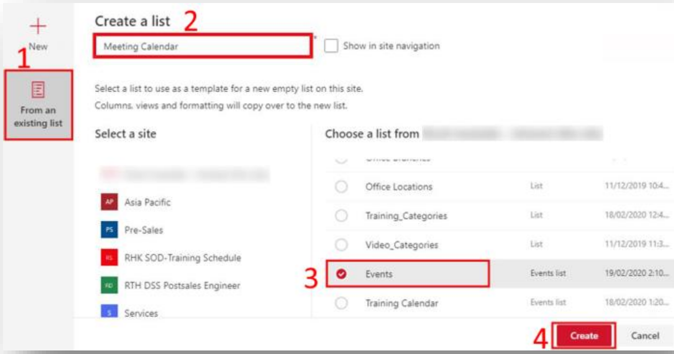


How to create a new Calendar

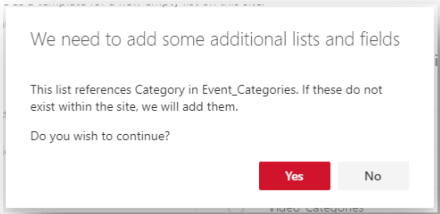
1. Go to the Site Settings > 'Site contents' > '+ New' > 'List'



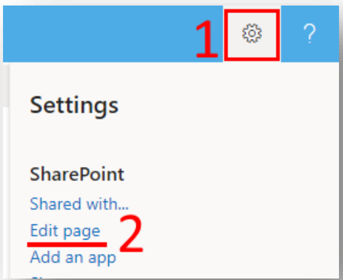
2. Click 'From an existing list' > enter a list name > select 'Events' > click 'Create'



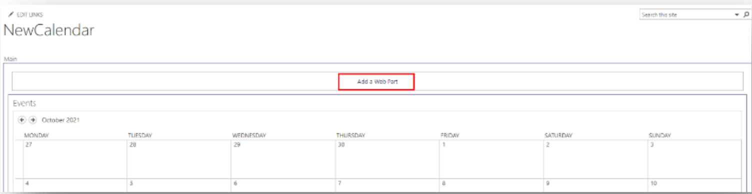
3. Click ‘Yes’ for Event Categories message



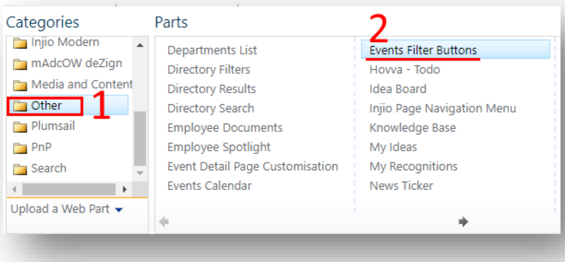
4. User will be directed to the new calendar
5. ‘Settings’ > ‘Edit page’



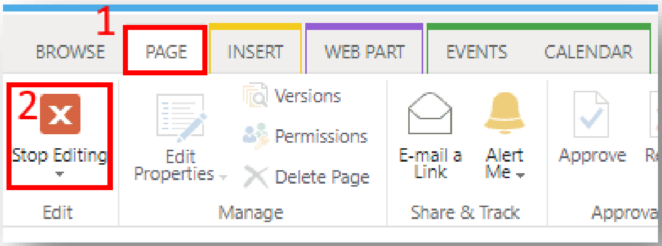
6. Click on ‘Add a new webpart’



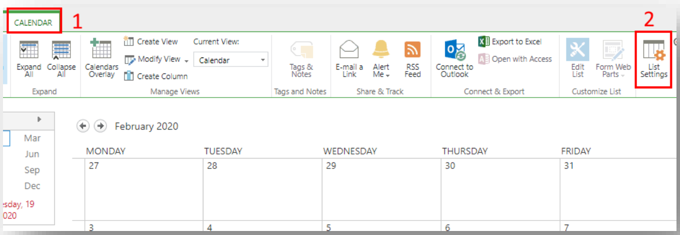
7. In the popup window, select ‘Others’ > ‘Events Filter Buttons’ > ‘Add’



8. From the top ribbon, ‘Page’ tab > click ‘Stop Editing’ to save

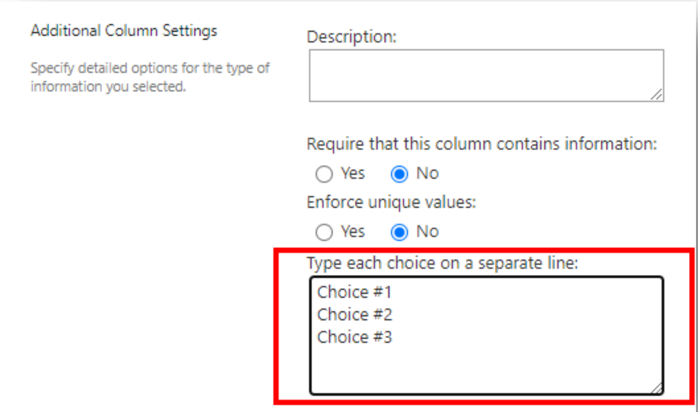


9. Select ‘CALENDAR’ in the menu ribbon > ‘List Settings’

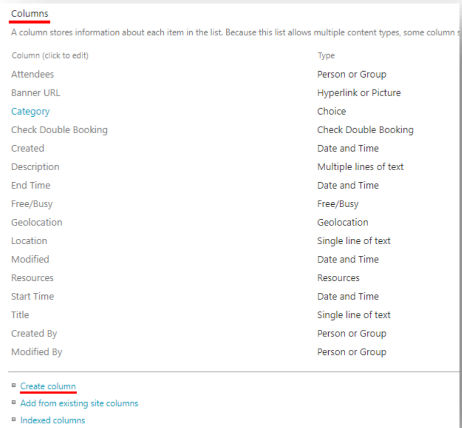


10. Scroll down to ‘Columns’ section > Select ‘Category’

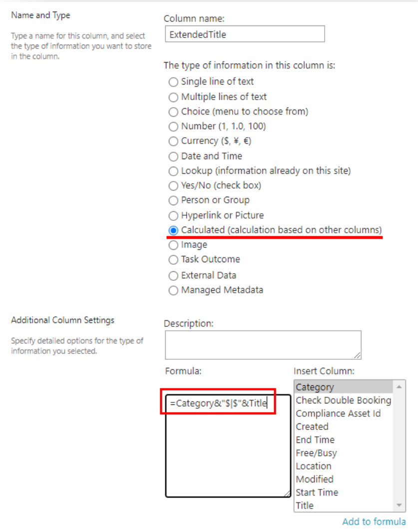
11. In the edit column page, place each choice on a separate line



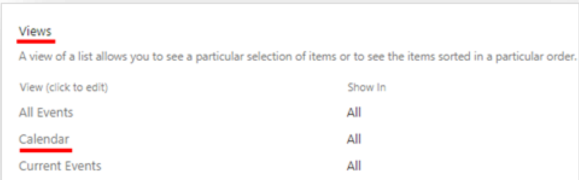
12. Click ‘OK’ to save
13. Scroll down to ‘Columns’ section again > ‘Create column’



14. Name the column ‘ExtendedTitle’ > select ‘Calculated’ type
15. Paste formula ‘=Category&’$|$’&Title’ to Formula textfield > click ‘OK’



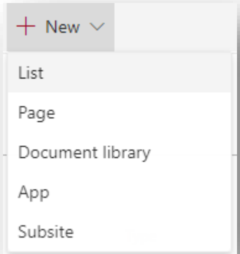
16. Scroll further down to 'Views' section > click 'Calendar'



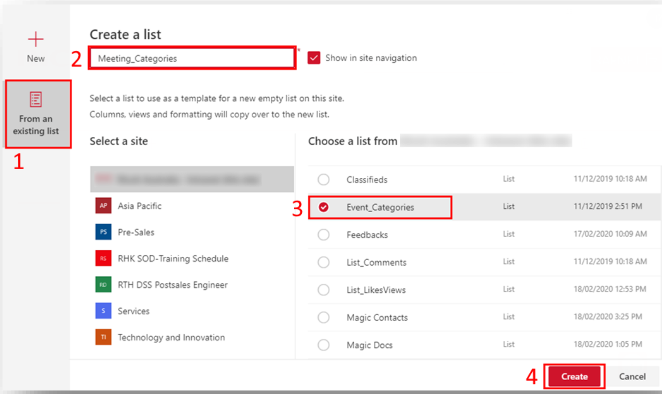
17. Scroll to 'Calendar columns' section, update dropdown as follow > click 'OK'

How to create a new Event Category list

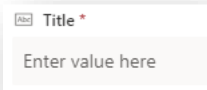
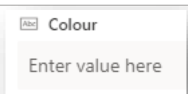
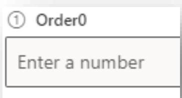
1. Site contents > '+ New' > 'List'



2. Select ‘From an existing list’ > Enter a list name > Select ‘Event_Categories’ > Click ‘Create’



5. User will be directed to the new list
6. Select ‘+ New’ in the list menu
7. Fill in the fields to create a new category

Title	**Title**	User can give a Title of their choice	
Colour	**Colour**	User must give hex code of colour	
Order	**Order0**	User can give order for the categories	
Attachments	**Attachments**	Images can be added to	

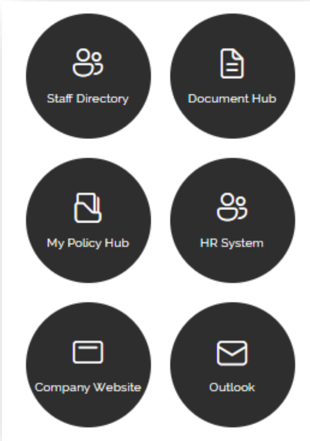
attachments	

8. Click ‘Save’
9. Repeat step 6-8 to create more category

Note: The category for ‘Events’ and ‘Events_Categories’ must be exactly the same (case-sensitive) in order to have it show as an option for a new event

Tiles

This section shows links on the homepage in tile style. The module can be displayed in different styles.



Features

1. Link cluster to direct users to frequently-accessed resources, both internal and external
2. Can be configured to display in different shapes
3. Each tile can contain an icon and text
4. Each tile can be configured to display a color or image as the background

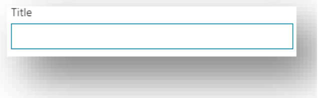
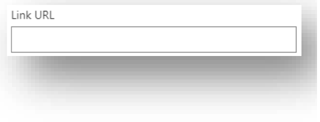
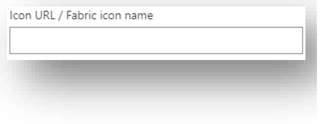
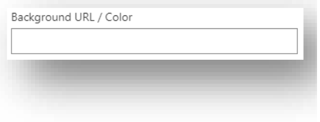
Configurations

Data source: Tile items are not stored in any lists on the root site. If the web part is deleted, all the information would be lost.

How to create a Tile
How to edit a Tile
How to delete a Tile
How to config the Tile web part
How to set up Audience Targeting for tiles

How to create a Tile

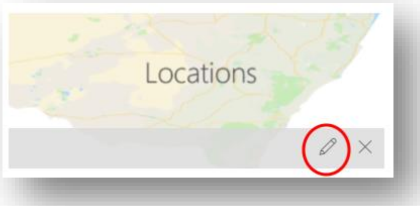
1. Navigate to a page with the tile web part > Edit the page
2. Click on the '+' tile to open a new form

Title	**Title**	User can choose a Title to display on the tile	
Link URL	**Link URL**	Enter link for tile to redirect to	
Icon URL/ Fabric Icon name	**Icon URL/ Fabric Icon name**	Icon to show on tile Options: - Link of an icon - Fabric icon name (<u>Available ions</u>) - The fabric icon code cannot be used, but the name of the Fabric Icon should be used.	
Background URL/ Color	**Background URL/ Color**	Background image/ color Options: - Image link - Color (e.g. text, hex code, rgba)	

3. Click 'Save' and publish the change

How to edit a Tile

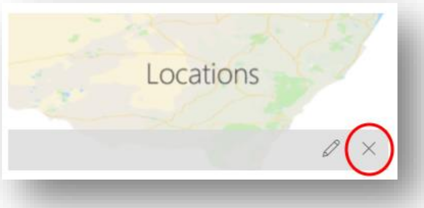
1. Go to the page with the tile web part > Edit page
2. Click on the pencil – 'edit' icon of the tile that you want to edit



1. Enter the new Title/URL > click 'Save'
2. Publish page to publish the change

How to delete a Tile

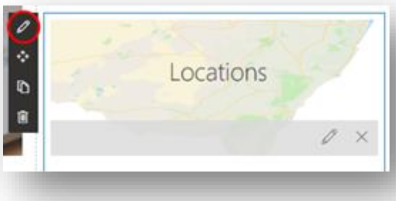
1. Go to the page with the tile web part > Edit page
2. Click on the 'x' icon of the tile that you want to delete



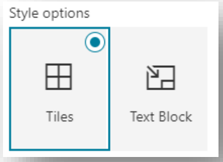
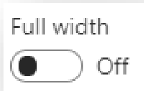
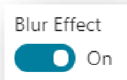
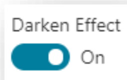
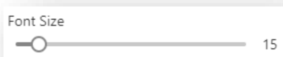
3. Publish page to publish the change

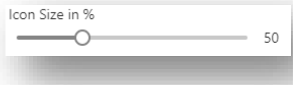
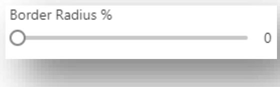
How to config the Tile web part

1. Go to the page with the tile web part > Edit page
2. Click on the Tiles web part > Click on pencil icon to edit



3. Edit property panel on the right

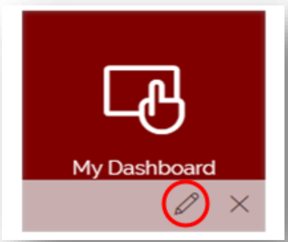
Style Options	**Style Options**	User can select a style of choice	
Show Icon	**Show Icon**	Toggle ‘On’ to show icon	
Full Width	**Full width**	Toggle ‘On’ for full width	
Blur effect	**Blur effect**	Toggle ‘On’ to blur background	
Darken Effect	**Darken Effect**	Toggle ‘On’ to darken background	
Text Color	**Text Color**	Toggle ‘On’ for white text and keep ‘Off’ for black text	
Font Size	**Font Size**	Use slider to select font size	

Icon size	**Icon size in %**	Use slider to select icon size in %	
Border Radius	**Border Radius %**	Use slider to select border radius in %	
Tile Width	**Tile Width**	Use slider to select tile width	
Tile Height	**Tile Height**	Use slider to select tile height	

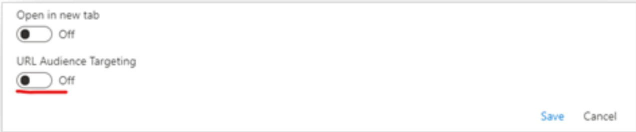
4. Publish page to save

How to set up Audience Targeting for tiles

1. Click the pencil icon of an existing tile to edit its properties

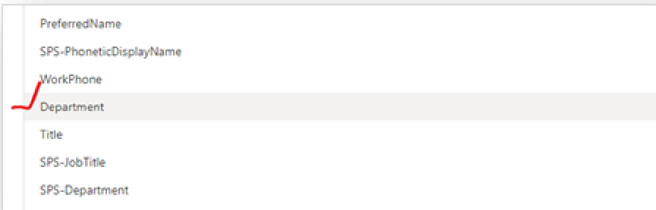


2. Toggle URL Audience Targeting ‘On’



3. From the User Property dropdown, select a SharePoint User Profile property to which it will be targeted

For example, if ‘Department’ is selected, users will be redirected to a specific page based on their department



4. Enter a default URL that the tile should redirect to if user property not matched

5. Follow the structure below to input Mapping Schema
   Template for mapping schema for the tiles webpart -

   {
   ‘The Name of Department 01’: ‘The link that people of Department 01 will be redirected to’,
   ‘The Name of Department 02’: ‘The link that people of Department 02 will be redirected to’
   }

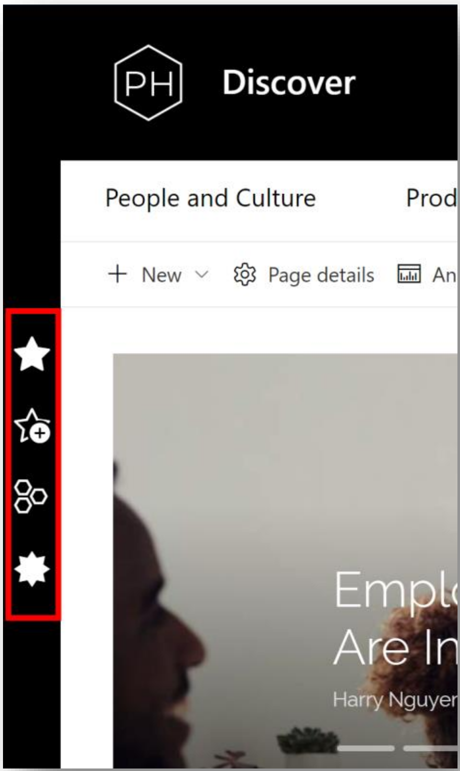
   Example
   {
   ‘Marketing’:
   ‘http://tenant.sharepoint.com/sites/intranet/sitepages/marketing.aspx’,
   ‘Sales’: ‘http://tenant.sharepoint.com/sites/intranet/sitepages/sales.aspx’,
   ‘Support’: ‘http://tenant.sharepoint.com/sites/intranet/sitepages/support.aspx’
   }

6. Click ‘Save’
7. Submit page to publish the change

Magic Links & Documents

Magic Links

This module can be used to share the commonly used links throughout the company in a single location, and by individual users to bookmark pages, people and documents.



Features

1. Each icon has a different purpose that will be discussed below
2. These will be visible on all pages

Configurations

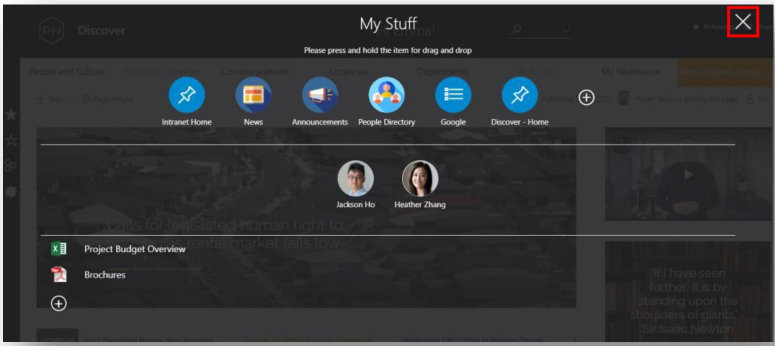
Data Source: Site contents > 'Magic Links'

[How to config My Stuff]
[How to config System links and Quick links]

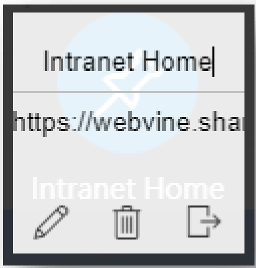
How to config My Stuff

My Stuff is a section reserved for each user to store his/her favourite links for reusability.

1. When user click on the My Stuff icon, a section with all personal links, personal contacts and personal documents will appear in full screen mode. Click on 'X' or dark background to close it.



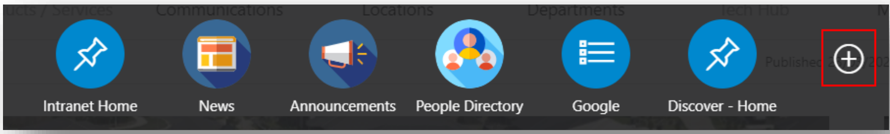
2. User can change the order of the links by dragging them around the page.
3. User can edit the link by clicking the link title, the following screen will appear:



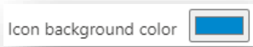
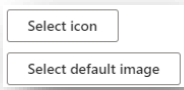
4. From here, user can change the Title of the link, change the color of the Pin or Remove the link.

Add Link

Via magic links slide out



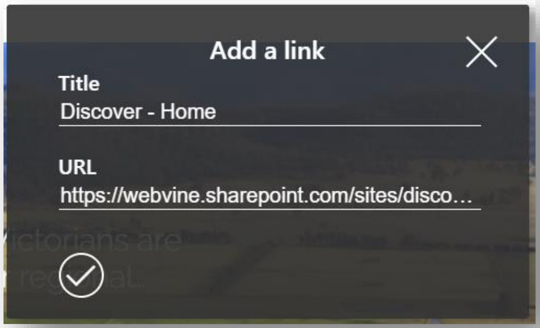
1. Fill in details for the new magic link

Text box	**Title**	Give a title to the webpart	
Text box	**URL**	Give the URL for the tile to redirect to	
Select	**Icon Background color**	Use one of the methods to select a background color	
Button	**- Select icon** **- Select default image**	Use the buttons to add an icon for the tile/a default image to appear	

2. Click 'Save'

Via add a link icon

1. When a user clicks the ‘Add a Link’ icon, a dialog box pops out and allows the user to save the current page to Personal Links. Users can define the Title of the link so that it is more meaningful and the URL is set to the current address by default.
2. Users can also add links external to the intranet. Just click the ‘Add a link’ button and enter details of the relevant link (for example, Title: Google Search, URL: http://www.google.com.au)



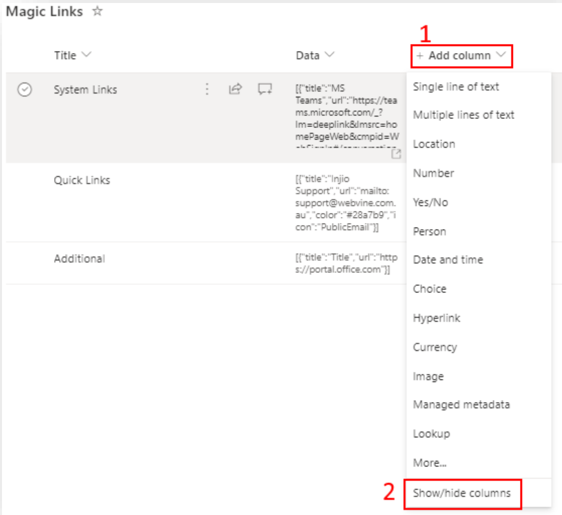
How to config System links and Quick links

Magic Links Admins can update System Links and quick links by using the ‘+’ buttons under each section, these will be shown to all users

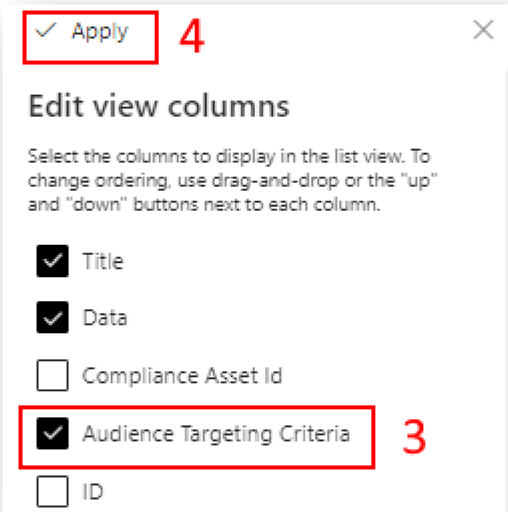
How to set up Audience Targeting for System Links

Note: System Links use a property such as ‘Department’ or ‘Office’ to differentiate user for audience targeting

1. Navigate to Magic Links list in ‘Site Contents’
2. Add ‘Audience Targeting’ column to the list if not available



3. Select ‘Audience Targeting Criteria’ > ‘Apply’



4. Create duplicates of System links with the required field in Audience Targeting column Eg: “Department eq Marketing”

Note: Department and Office are properties that syncs automatically from AD to SharePoint User Profile. If any other property is needed, please, check with WebVine

Magic Documents

This module can be used to share the commonly used documents throughout the company in a single location

Configurations

Data Source: Site Contents > 'Magic Docs'

How to config Personal Magic Docs
How to config System Docs

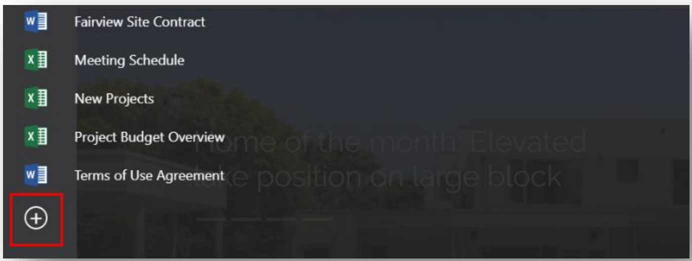
How to config Personal Magic Docs

Add a Magic Doc

Via Magic Links slideout

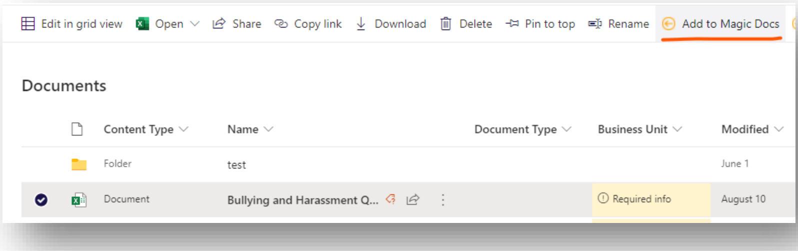
1. Click 'Personal Links' Icon to show the slide out page for my stuff

2. Click Add button in the magic docs section to select document

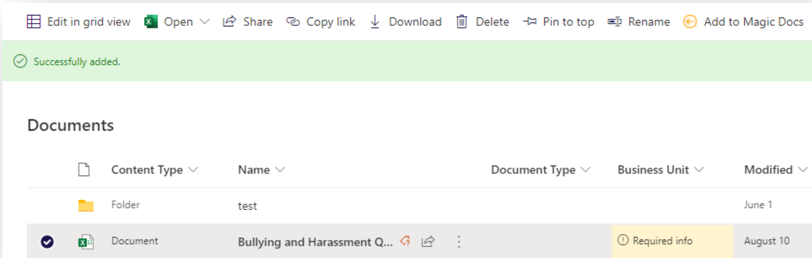


Via Document Library

1. In Document Library, select the document that you want to add
2. Click 'Add to Magic Docs' at the top bar

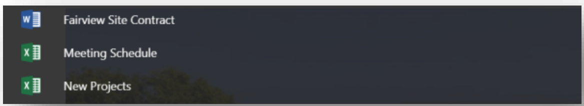


3. There will be a success message after the document is added.



Reorder Magic Docs

1. Click on an empty space behind a document to drag it upwards/downwards to reorder documents

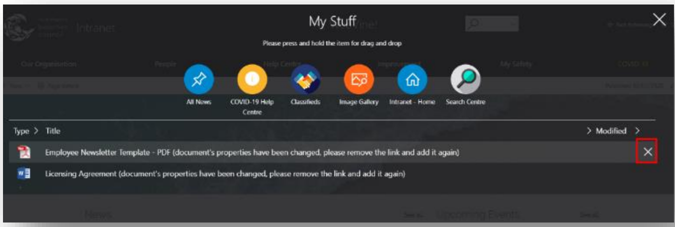


2. The preference will be saved automatically

Delete a Magic Doc

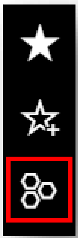
1. Hover on the document to show ' x '

2. Click ‘ x ‘ to delete the corresponding document



How to config System Docs

1. Click ‘Apps’ Icon to show the slideout page for magic links/docs



2. Click Add button in the magic docs section to select the doc which admin would like to present as System docs for the organisation

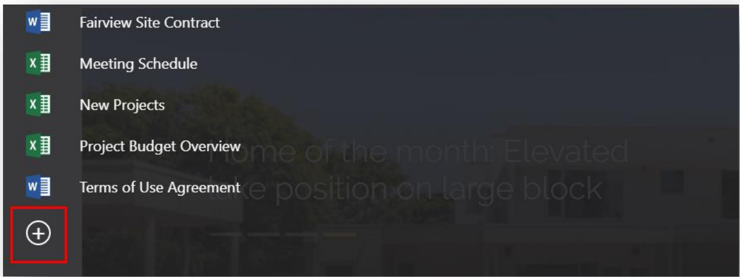
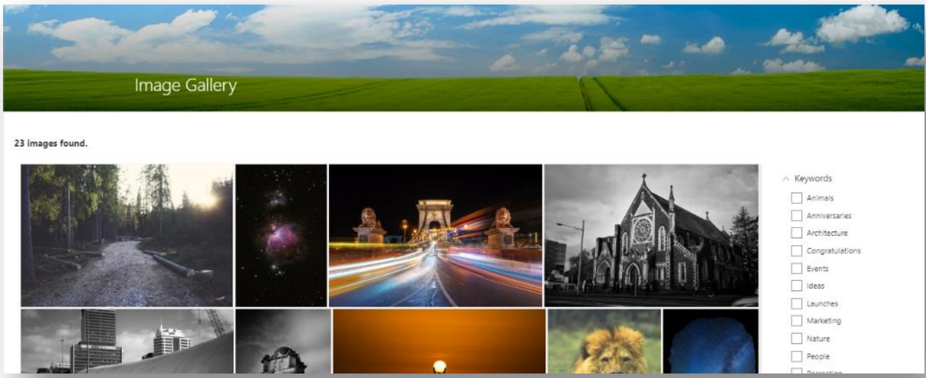


Image Gallery

This module can be used to share all images of the company. E.g., events, pets, recognitions, etc.

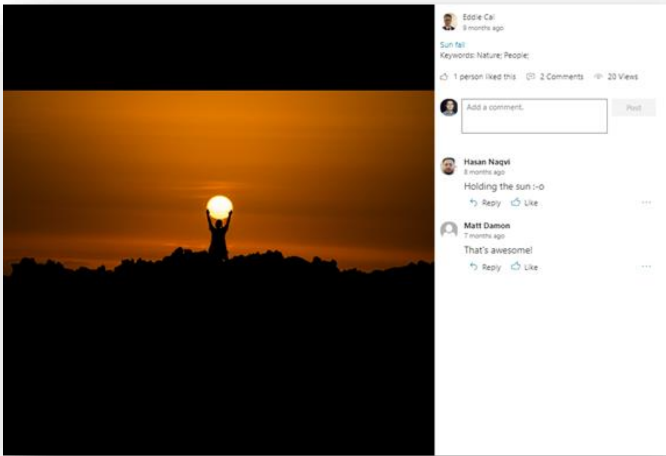
All Images page



Features

1. Show all images by descending created date
2. Filter results with customisable refiners, e.g. Keywords. This provides seamless archiving functionality
3. Click the image to open a popup window to show more details of the image on the current page

Image Popup window



Features

1. Show the image in a larger size on the left
2. Show author, title and keywords of the image
3. Show the number of likes, comments and views of the image
4. User can like and comment the image
5. User can like and reply to other's comments

Configurations

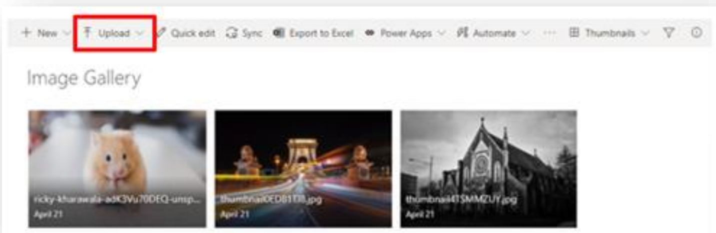
Data Source: Site contents > 'Images'

[How to add a new image](#)
[How to edit image properties](#)
[How to add Filters](#)
[How to map keywords to images](#)
[How to delete an image](#)

How to add a new image

To upload single image

1. Navigate to 'Site Contents' > 'Image Gallery' list
2. Click on 'Upload' on the menu



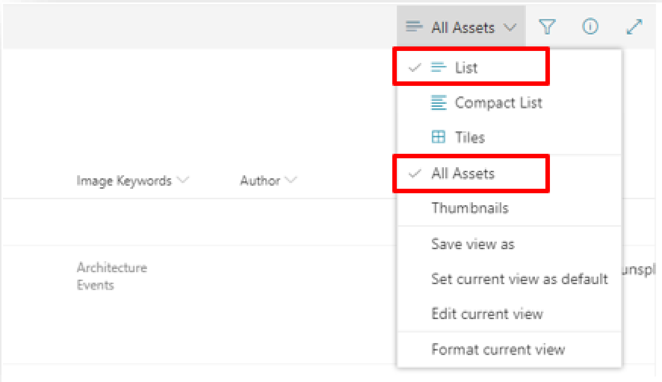
3. Choose the file from local computer and click 'OK'
4. The images will upload automatically

To bulk upload images

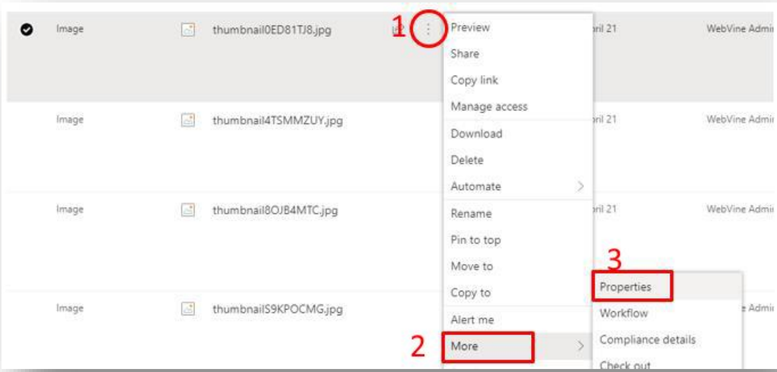
1. Use drag & drop method to drop images to the library, and edit the property fields using 'Quick Edit' afterwards (see next section)

How to edit image properties

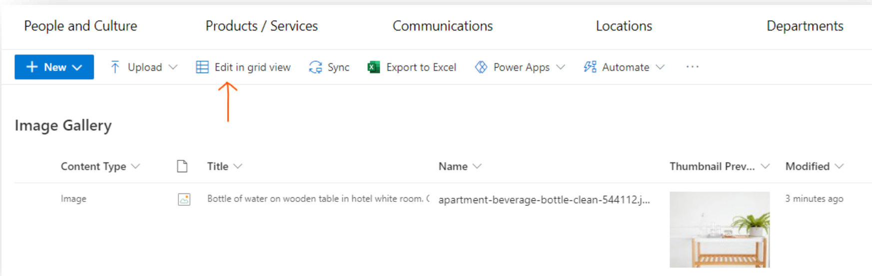
1. Navigate to 'All Assets' > Select 'List' and 'All Assets'



2. To edit single image's properties only – 'Image Gallery' library, click on the ellipses > 'More' > 'Properties

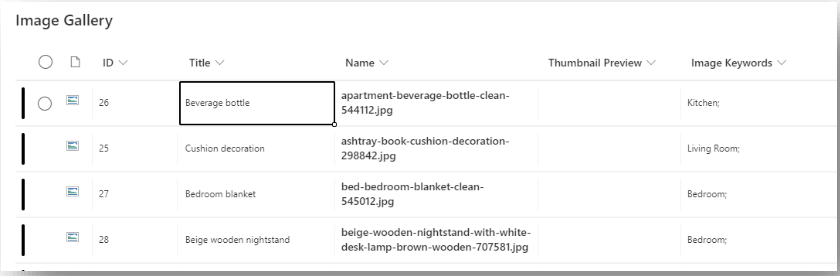


3. To bulk edit images' properties - use 'Edit in grid view after drag and dropping multiple images



1. Properties can be edited in grid view like in Excel
   User can use copy and paste to copy one value to multiple fields.
   (the image keywords may take a few seconds to show after selected)

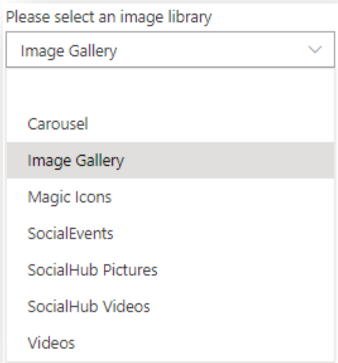
Note: Please do not leave empty

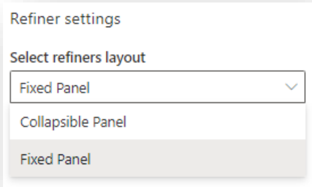


2. Click ‘Exit quick edit’ to save the changes

How to add Filters

1. Filters (Refiners) are added to the Injio Image Gallery web part using the ‘Image Keywords’ column from the ‘Image Gallery List’ under Site Contents.
2. To configure filters -

Text Box	**Title of the gallery**	Give a title of choice	
Drop-down menu	**Please select an image gallery**	Select a library from the menu	
Drop-down menu	**Select refiners layout**	Select the layout from the menu	



Edit Refiners:

1. Filter field > Select required filter field
2. Give appropriate Filter name
3. Refiner Template > Default refinement item
4. Refiner sort type > Alphabetical
5. Expand filter by default > check box (yes)
6. Save

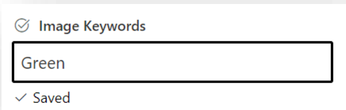
Image gallery backend settings

1. Give all images keywords so that they will be categorized accordingly

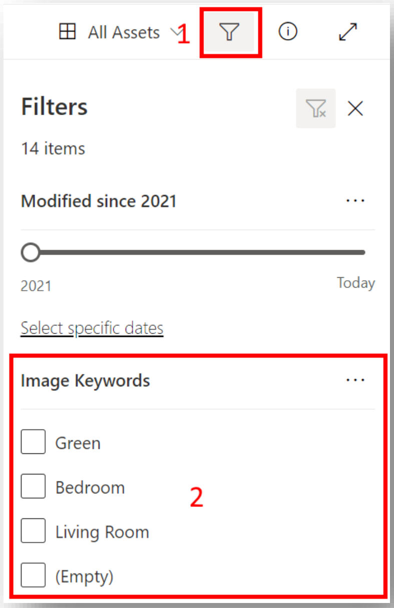
How to map keywords to images

1. Click on the ellipses of an image > navigate to 'Details'
2. Navigate through the menu opened on the right to find 'Image keywords'
3. Select a keyword to set and make sure it is saved

   Note: Please contact your admin/IT person or WebVine if no keywords are available

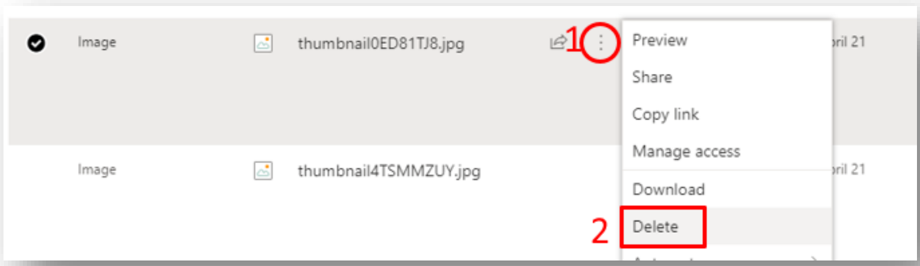


4. You can filter through using the keywords in the Image Gallery. Find the Filter button (1) on the top menu on the page



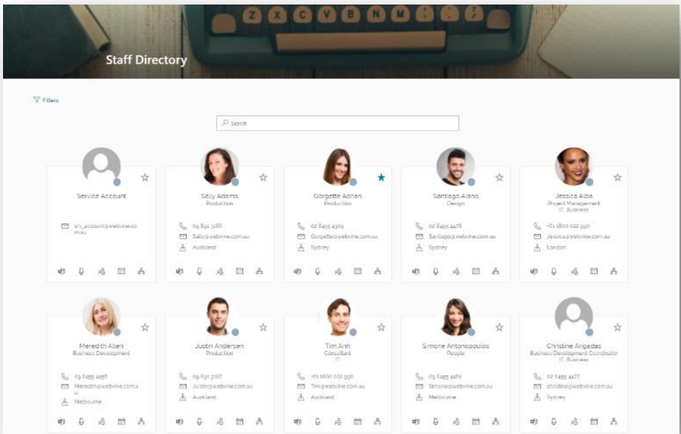
How to delete an Image

1. Click on the ellipses of an image > click on ‘Delete’ to delete an image



Staff Directory

The staff directory is a collection of all employees of the company



Features

1. Show complete profiles of people within the organisation
2. Search for people within the organisation and their contact details
3. Show a list of people within a specific department or office, or using keywords and job title
4. Start a conversation or video call using Microsoft Teams or Skype Business
5. View availability and org chart of each staff

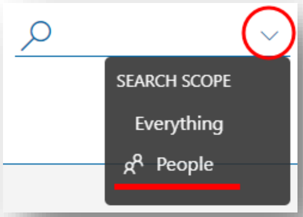
Configurations

[How to Use Staff Directory](#)
[How to Config Staff Directory](#)

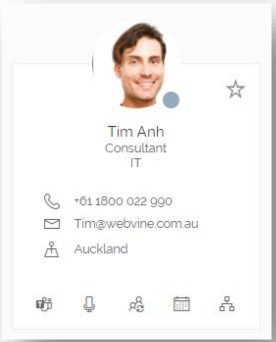
How to Use Staff Directory

1. Navigate to Staff Directory page from Homepage or Site Pages

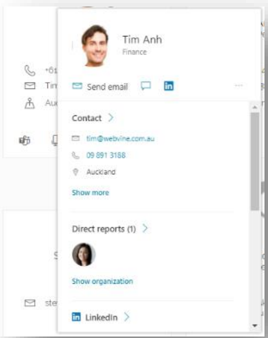
From Homepage -



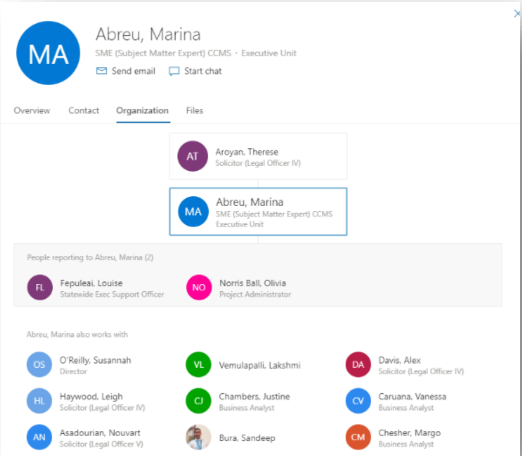
2. Use the filter on the top to filter staff using customisable refiner
3. Each item card shows information about a staff such as name, job title, phone and email



4. Hover on the profile picture to display an expanded view of information e.g. Location, report manager

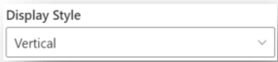
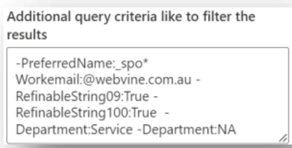


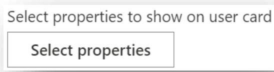
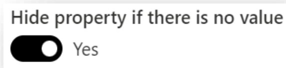
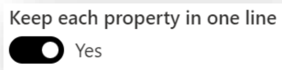
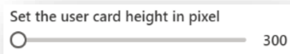
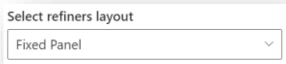
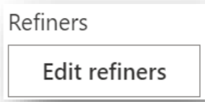
5. Click ‘Show more’ to display more information, e.g. Org Chart



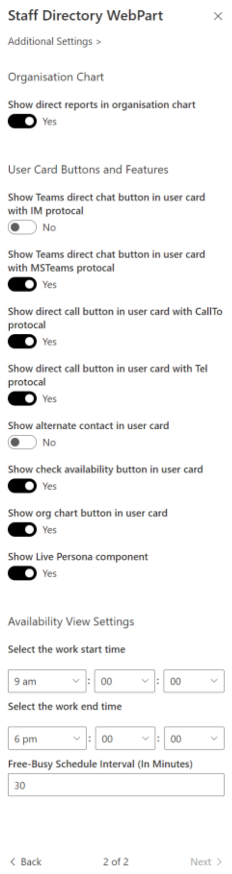
How to Config Staff Directory

1. Navigate to Staff Directory page > Edit page
2. Click the pencil icon to edit web part
3. Adjust settings in the right panel

Description Field	**Description Field**	User can add a title of their choice	
Display Style	**Display Style**	User can select style from drop-down menu	
Sort By	**Sort By**	User can sort by selecting a category from drop-down menu	
Query	**Additional query criteria like to filter the results**	User can enter additional queries to filter	

Properties	**Select Properties to show on user card**	User can select properties to show on the user card	
Hide	**Hide Property if there is no value**	Toggle ‘Yes’ to hide property without a value	
Property	**Keep each property in one line**	Toggle ‘Yes’ to keep each property in one line	
Height	**Set the user card height in pixel**	Use slider to set user card height	
Refiners’ layout	**Select Refiners layout**	User can select their choice of layout	
Refiners	**Edit Refiners**	User can add refiners	

4. The buttons at the bottom of the user cards can be adjusted in the Page 2 of the settings > User Card Buttons Control



Document Library

This module can be used to share all documents of the company. E.g., project templates, contracts, policies & procedures, branding templates etc.

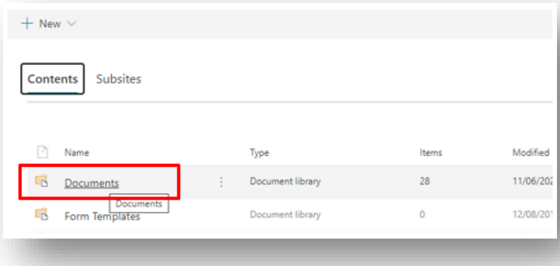
Configurations

Data Source: Site contents > 'Documents'

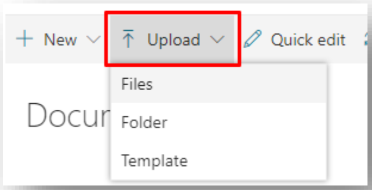
[How to add a Document](#)
[How to edit Document Properties](#)
[How to delete a Document](#)
[How to create a new Doc library](#)
[How to add a column to the library](#)

How to add a Document

1. Click 'Settings' > 'Site Content'
2. Click 'Documents' (default document library)



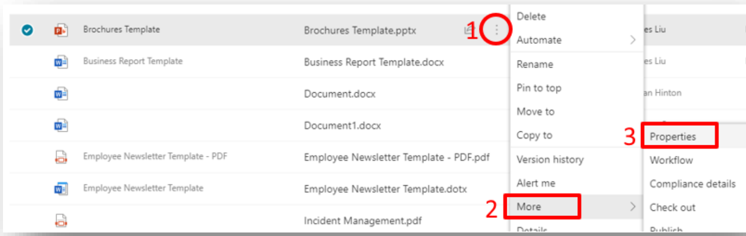
3. Click ‘Upload’ to upload a document from local computer



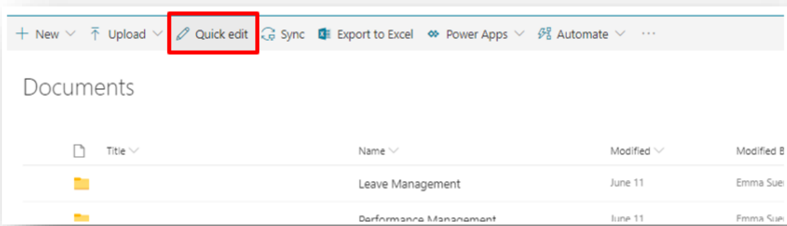
4. Or drag and drop the document from local computer folder into the document library

How to edit Document Properties

1. In the document library, click on the ellipses next to the document title > More > Properties to update the properties of a document



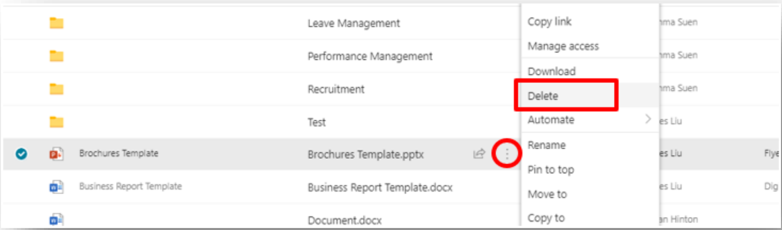
2. Or use the ‘Quick edit’ to enable editing document properties of multiple documents in an excel sheet at the same time



Note: Content Type of a document can only be edited by using the first method

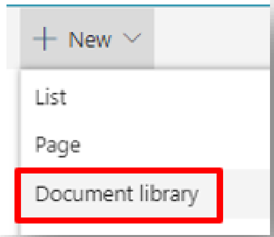
How to delete a Document

1. In the document library, click on the ellipses > 'Delete'

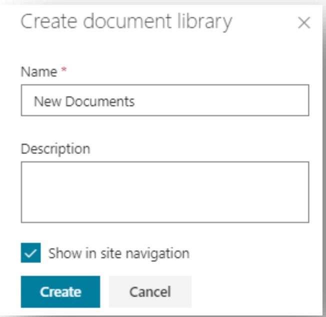


How to create a new Doc library

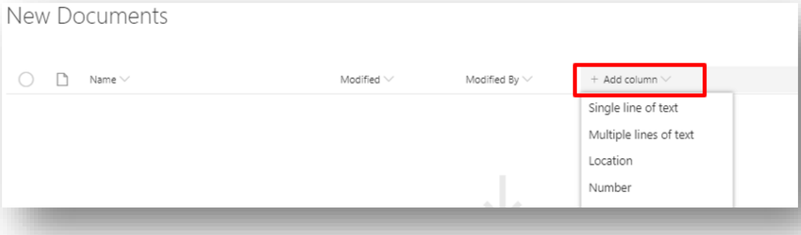
1. Go to 'Settings' > 'Site Contents'
2. Click ' + New ', select 'Document Library' in the dropdown



3. Name the library > Click 'Create'



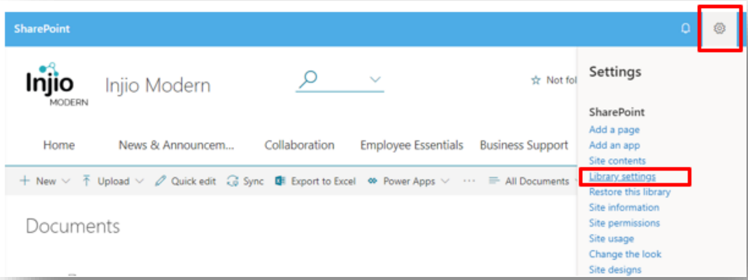
4. In the document library, Click 'Add columns' to add more columns



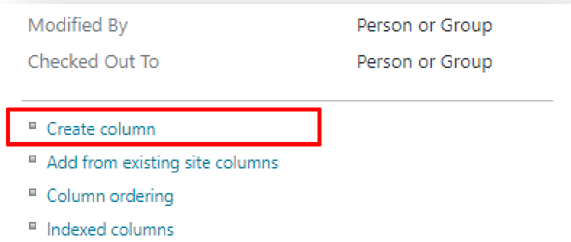
5. User can drag and drop the columns to rearrange the column orders

How to add a column to the library

1. In the document library, click ‘Settings’ > ‘Library Settings’

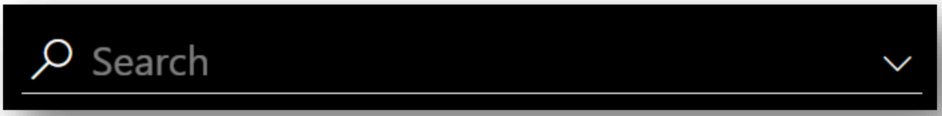


2. Scroll down to the column section
3. Click ‘Create column’



4. Fill in the Title, Column Type etc. in the new column page
    a. For Choice column, select dropdown for single entry, or select checkboxes to allow multiple entries
5. Click ‘OK’

Search



Features

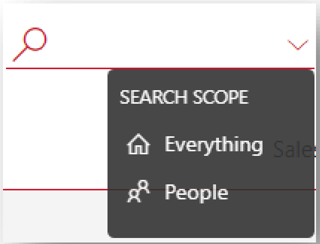
1. Allows to search all throughout the Intranet
2. Can be used to find pages, documents, images, videos

Configurations

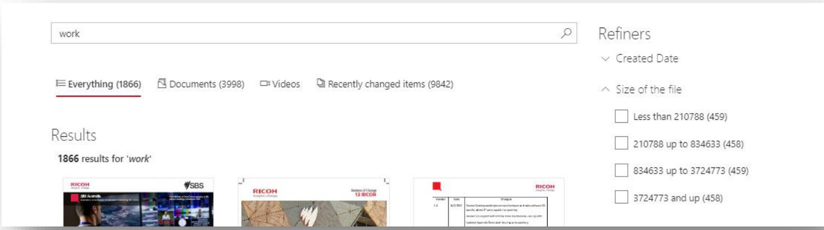
Data Source: This module sits on the header of the page. It can be configured from the Injio Configuration. The configurations include-

1. Enabling/Disabling the search bar
2. Expanding the bar to it its full length permanently
3. Changing the placeholder text
4. Search Option Prompt to search globally or from the scope only
5. Extra search options as a drop-down menu

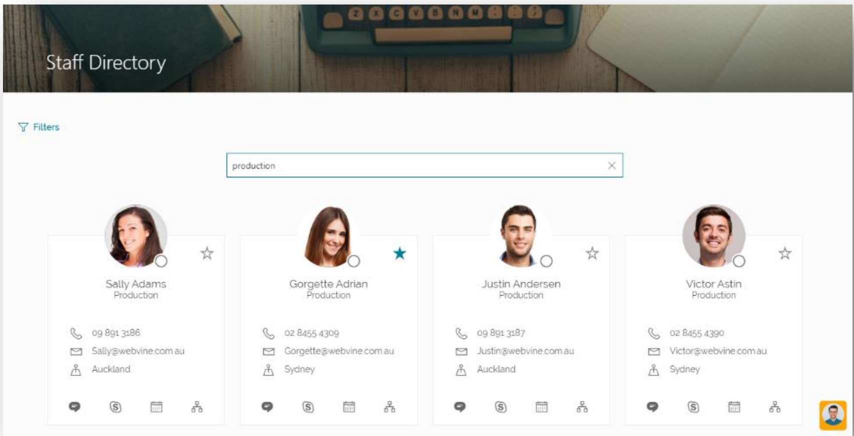
On every page, there is a search bar at the upper right corner. This can search across the whole intranet. User can choose to search for Everything or People only by clicking on the down arrow as illustrated below. It allows you to perform focus search based on key types of content.



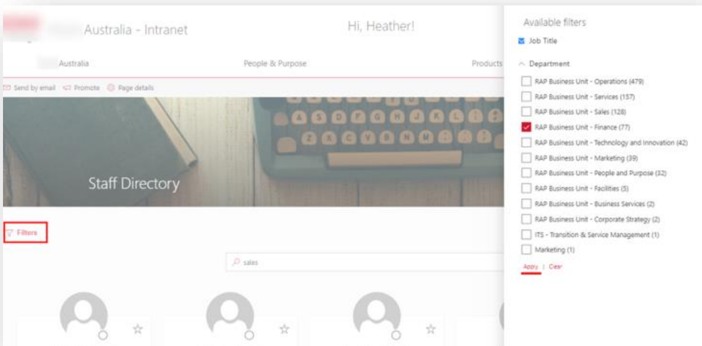
1. By default, or when ‘Everything’ is selected, user will be directed to the Search Centre that shows all the search results, including pages, documents and videos etc. User can also filter the results by created date, file size, etc. using the pre-configured refiner



When ‘People’ is selected, user will be directed to the Staff Directory that shows all the people with the relevant keywords in their names, titles, departments, etc.

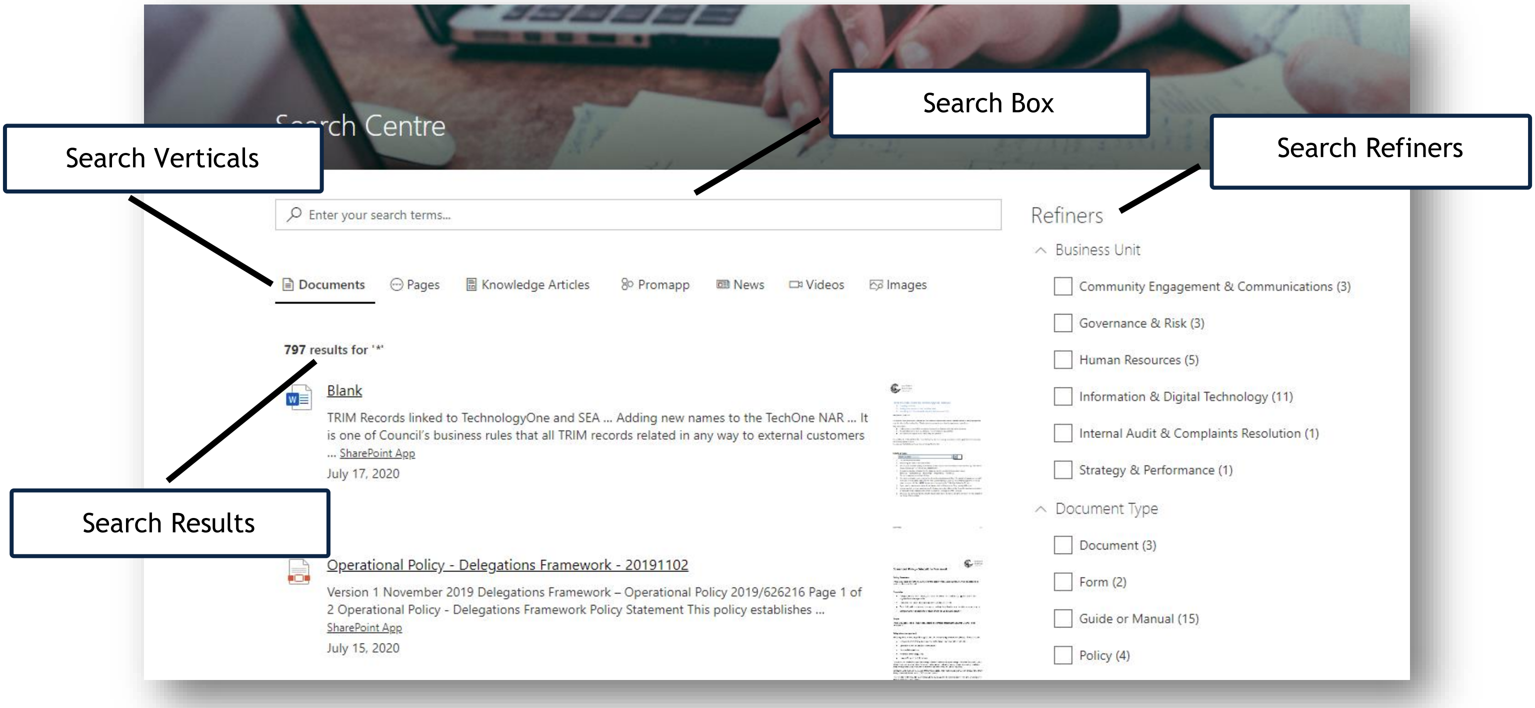


2. User can also filter the results by Job Title, Department etc. using the pre-configured refiner



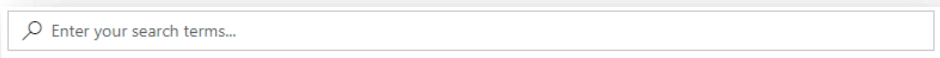
Search Centre

Search Box, Search Verticals, Search Results and Search Refiners are the key elements in the Search centre.



Search Box

The Search box is a field in which the user can input value to search for specific items

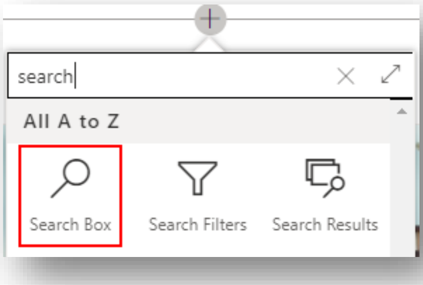


Configurations

[How to add a Search Box web part]
[How to config a search box]

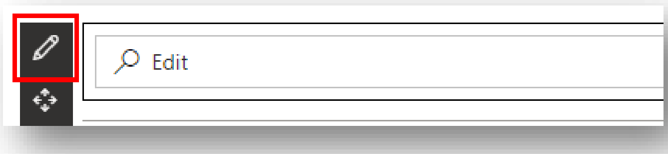
How to add a Search Box web part

1. Click ‘ + ‘ in a page to add a new web part
2. Enter ‘Search’ to find related web parts
3. Select ‘Search Box’ web part

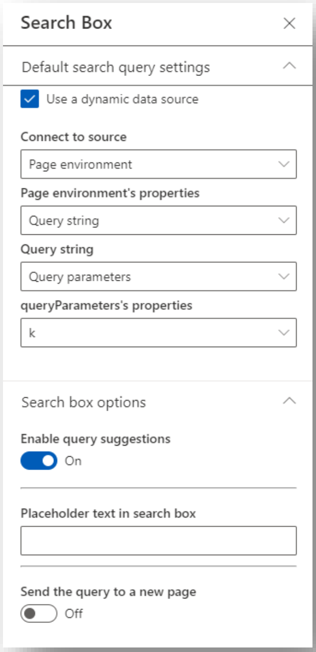


How to config a search box

1. Click ‘Edit’ button of the web part to show the property pane

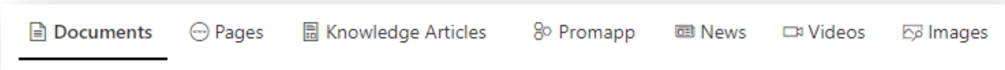


2. Adjust the settings as follows:



Search Verticals

Search verticals is a list of search areas from which to select (Documents, Pages etc.)



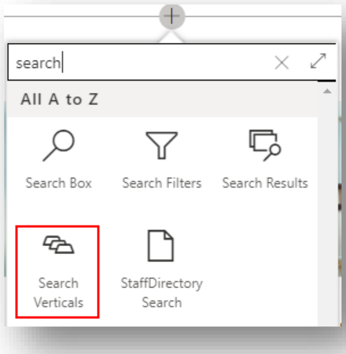
Configurations

[How to add a Search Verticals web part](#)
[How to configure Search Verticals web part](#)

How to add a Search Verticals web part

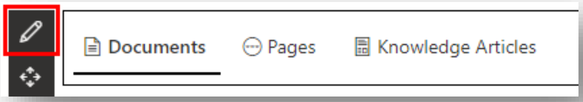
1. Click ' + ' in a page to add a new web part
2. Enter 'Search' to find related web parts

3. Select 'Search Verticals' web part

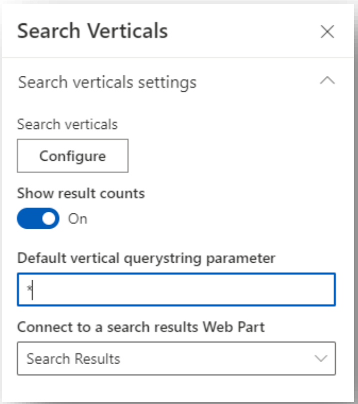


How to configure Search Verticals web part

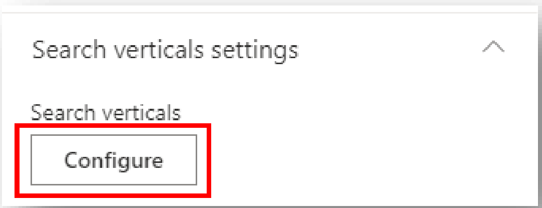
1. Click the pencil icon web part to show the property pane



2. Adjust to the same settings as follow:

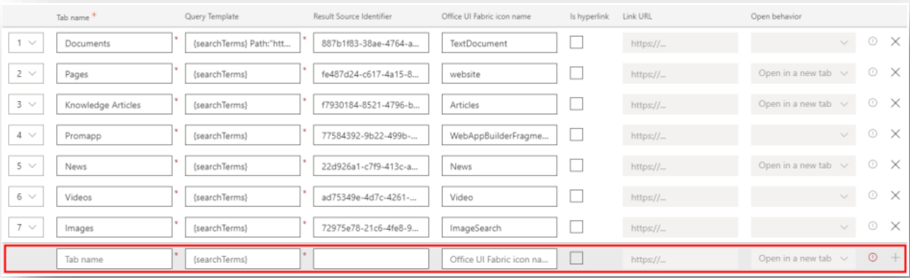


3. Click the 'Configure' button under Search verticals to add/edit/remove Search Verticals

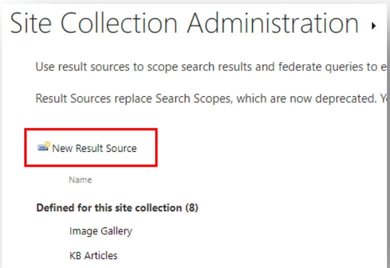


Add a Search Vertical

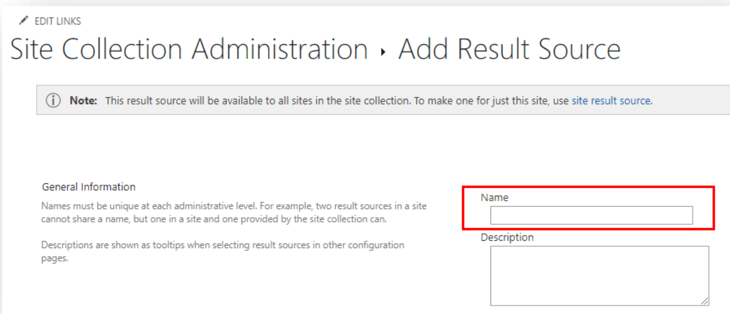
1. Fill in the last row to create a new search vertical



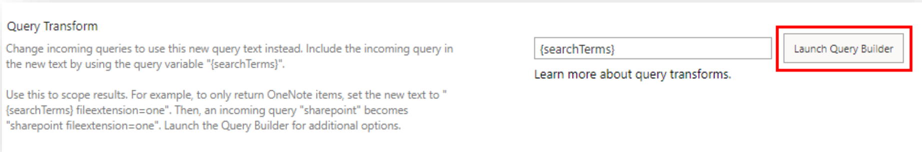
2. To get Result Source Identifier, go to Settings > Site Information > View all site settings > under Site Collection Administration > Search Result Sources
3. Click 'New Result Source'



4. Fill in the Name field only and keep other settings unchanged



5. Scroll down to find ‘Query Transform’ section > Click ‘Launch Query Builder’

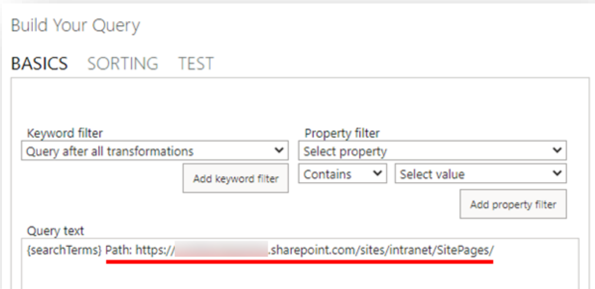


6. In the ‘Query text’ box, add the path you want to get the results from

   e.g.

   ‘Path: https://clientdomain.sharepoint.com/sites/intranet/SitePages/‘ for pages/knowledge articles/news

   ‘Path: https://clientdomain.sharepoint.com/sites/intranet/Shared%20Documents/’ for document library

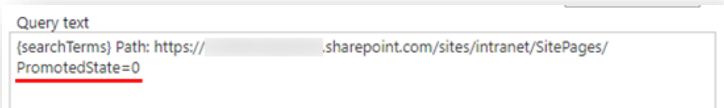


7. (This step is only for getting results from ‘Site pages’ library)

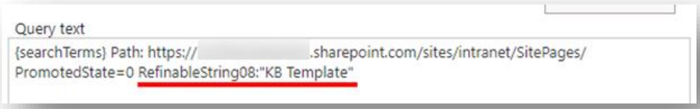
   All pages, knowledge articles and news are in the ‘Site pages’ library, add ‘PromotedState’ filter to distinguish the types

   Note: For pages (Knowledge articles are also pages), PromotedState=0

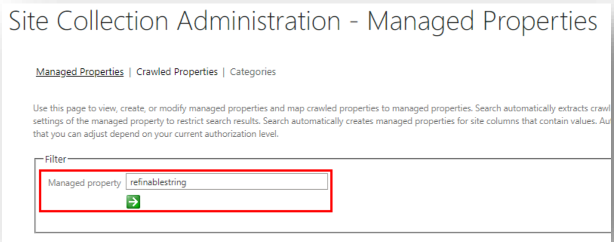
   For news, PromotedState=2



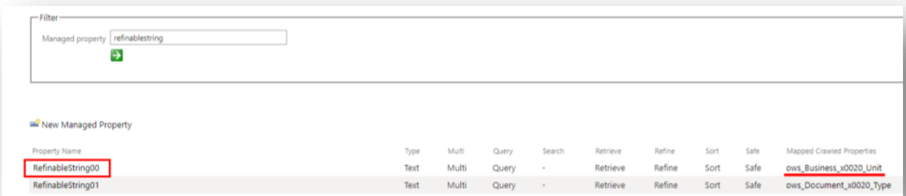
8. (This step is for filtering result source)
   To further filter Knowledge articles from pages, add ‘RefinableString08:’KB Template’ to Query text box



9. Add more filters to filter results, e.g. Business Unit: Human Resources
   To find the search terms, go to Settings > Site Information > View all site settings > Search Schema
10. In the page, search for ‘refinableString’



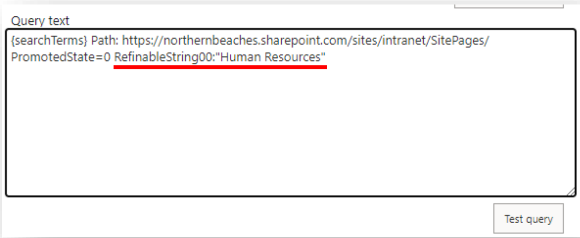
11. Find the property that is mapped to, e.g. Business Unit is mapped to ‘RefinableString00’



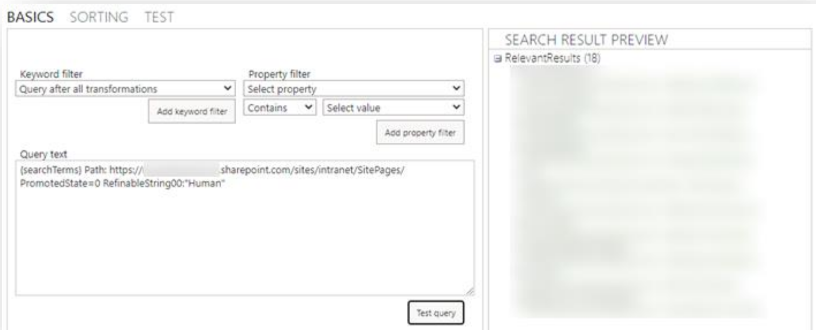
If the desired property is not mapped yet, please refer to the ‘Setup new RefinableString’ section

12. Back to the ‘Query text’ box and add RefinableString00=‘Human Resources’

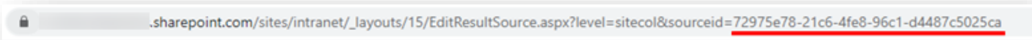
    Note: use RefinableString00=‘Human Resources’ if business unit is equal to Human Resources, use RefinableString00:’Human Resources’ if business unit contains Human Resources but not equal



13. Click ‘Test query’ to preview the result



14. Click ‘OK’ > ‘Save’
15. Click the new result source created to open the page
16. Copy the result source identifier in the address bar



17. Add a fabric icon showing in front of the search verticals, go to the link and look for available icons
18. Copy the fabric icon name to the ‘Office UI Fabric icon name’ field
19. Click ‘ + ‘ to add more rows or ‘Add and save’ to close the pop up window
20. Save and refresh the page to see the changes

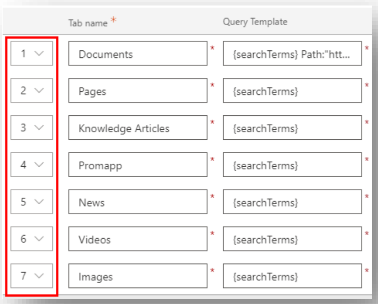
Edit a Search Vertical

1. Open the ‘configure search vertical’ pop-up window
2. Update the fields

3. Click ‘Save’ to save the changes

Reorder the Search Verticals

1. Open the ‘configure search vertical’ pop-up window
2. Adjust the number column in front of each Search Verticals to reorder



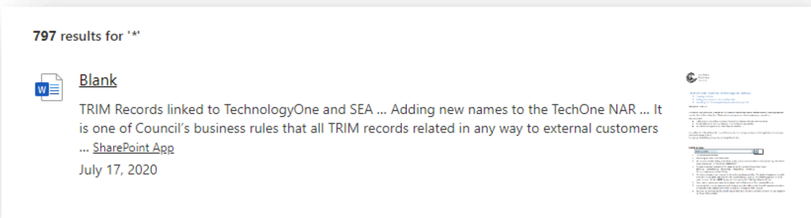
3. Click ‘Save’

Delete a Search Vertical

1. Open the ‘configure search vertical’ pop-up window
2. Click the ‘ x ‘ at the end of the corresponding row to remove the specific vertical
3. Click ‘Save’ to save the changes

Search results

Search results displays a list of results from the selected search vertical with different display styles available

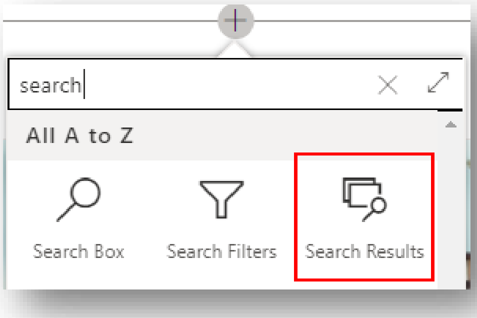


Configurations

[How to add a Search Results web part](#)
[How to config the Search Results web part](#)

How to add a Search Results web part

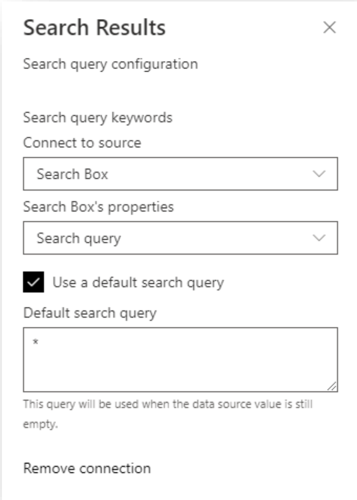
1. Click ' + ' in a page to add a new web part
2. Enter 'Search' to find related web parts
3. Select 'Search Results' web part



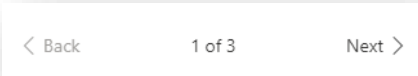
How to config the Search Results web part

1. Click the pencil icon of the web part to show the property pane

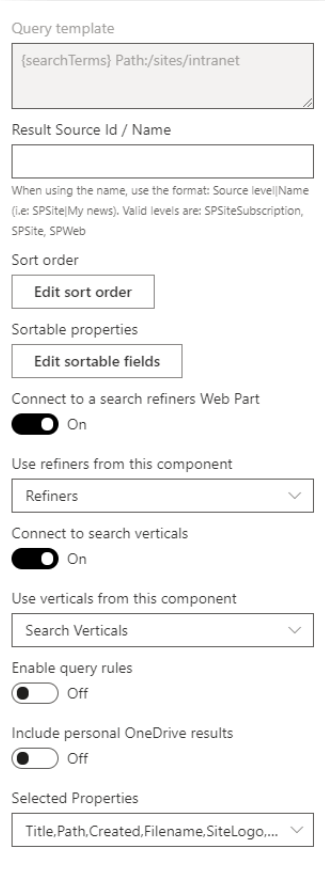
2. Adjust to the same settings as follows:

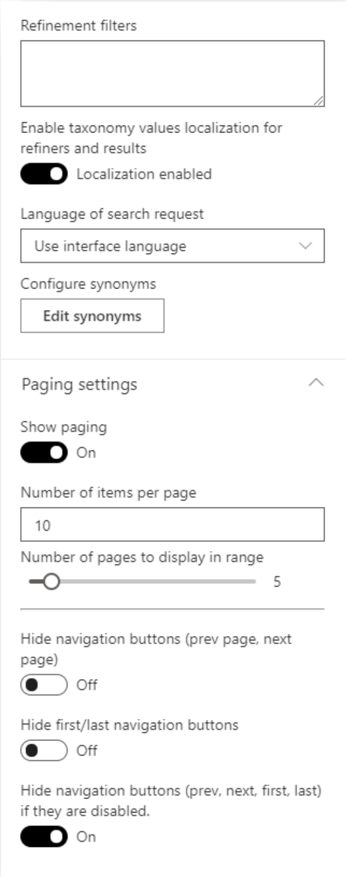


3. Click ‘Next’ to go to the second page

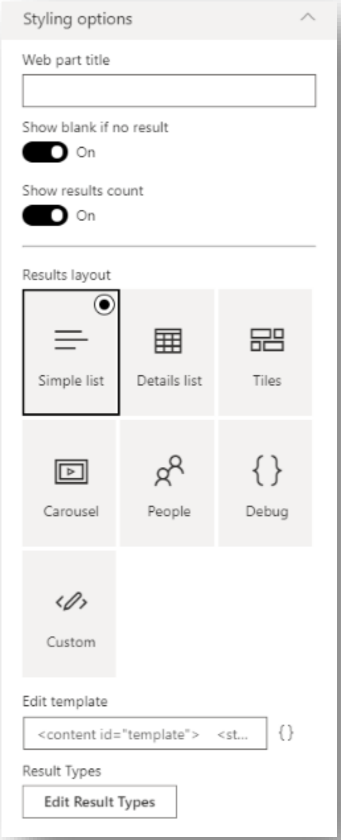


4. Adjust the settings according to requirement:



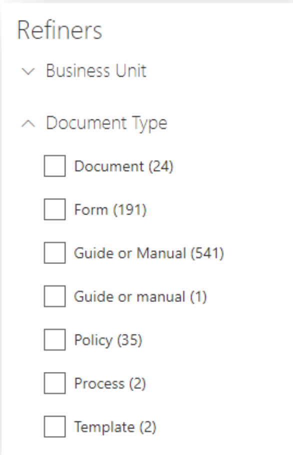


5. Click ‘Next’ to go to the last page
6. Adjust the layout settings as desired



Search refiners

Search refiners are used to further filter the search results by its properties (list columns, e.g. document types, business units)

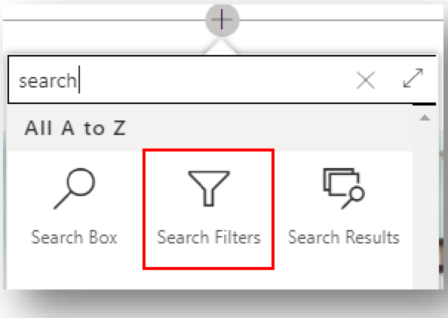


Configurations

[How to add a Search Refiners web part]
[How to config the Search Results web part]

How to add a Search Refiners web part

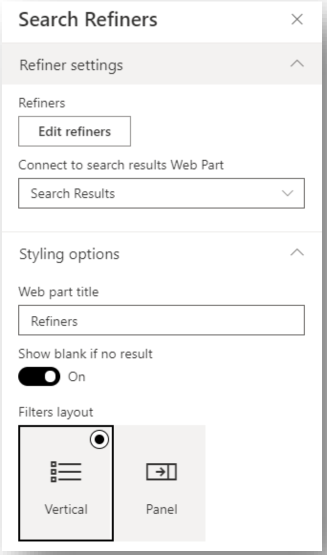
1. Click ‘ + ‘ in a page to add a new web part
2. Enter ‘Search’ to find related web parts
3. Select ‘Search Filters’ web part



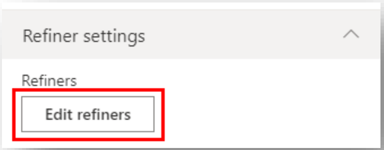
How to configure the Search Results web part

1. Click the pencil icon on the web part to show the property pane

2. Adjust to the same settings as follows:

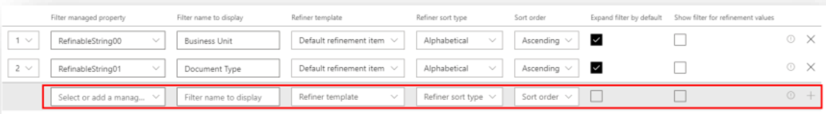


3. Click ‘Edit refiners’



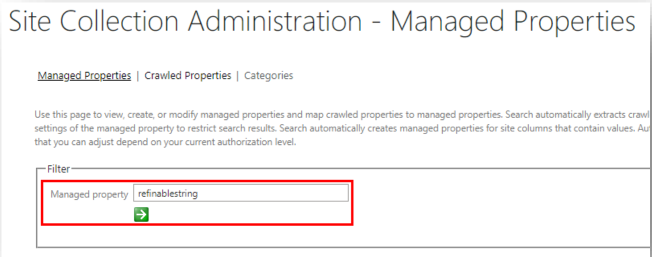
Add a refiner

1. Fill in the last row to create a new search vertical

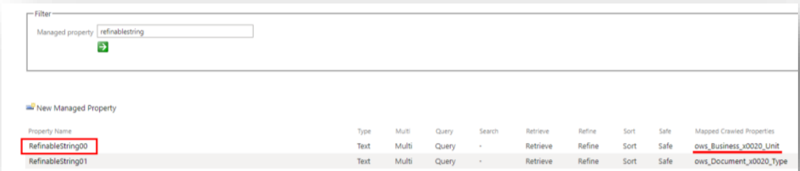


2. To look for a filter managed property, go to Settings > Site Information > View all site settings > Search Schema

3. In the page, search for ‘refinablestring’

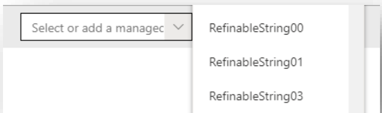


4. Find the property to which it is mapped, e.g. Business Unit is mapped to ‘RefinableString00’



Note: If the desired property is not mapped yet, please refer to the ‘Setup new RefinableString’ section

5. Back to the ‘Refiner’ pop-up window, select the managed property from dropdown



6. Fill in the other information by preference
7. Click ‘ + ‘ to add more rows or ‘Add and save’ to close the pop up window
8. Save and refresh the page to see the changes

Edit a Refiner

1. Open the ‘Refiner’ pop-up window
2. Update the fields
3. Click ‘Save’ to save the changes

Reorder the Refiners

1. Open the ‘Refiner’ pop-up window

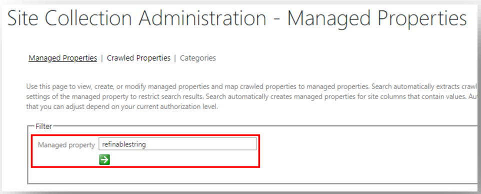
2. Adjust the number column in front of each refiners to reorder
3. Click 'Save'

Delete a Refiner

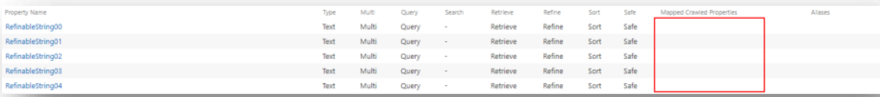
1. Open the 'Refiner' pop-up window
2. Click the ' x ' at the end of the corresponding row to remove the specific refiner
3. Click 'Save' to save the changes

Setup new RefinableString for search vertical filter and search refiner

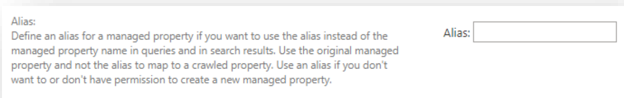
1. Navigate to 'Settings' > 'Site Information' > View all site settings > 'Search Schema'
2. In the page, search for 'refinablestring'



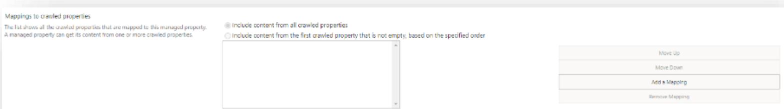
3. Click the next available RefinableString with no 'Mapped crawled property' to start



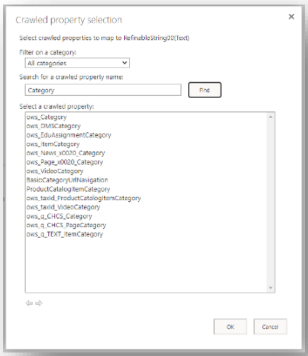
4. Leave the other settings unchanged and scroll down to Alias to provide an alias (optional)



5. Scroll down to 'Mappings to crawled properties' > 'Add a Mapping'



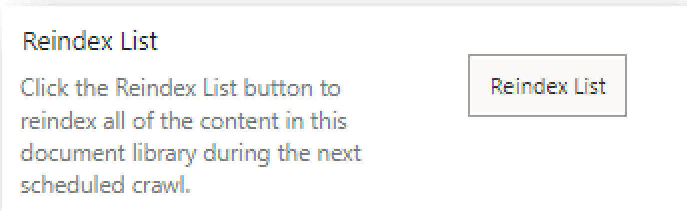
6. Search for a keyword of the property (the crawled property may look slightly different and usually starts with ows_)



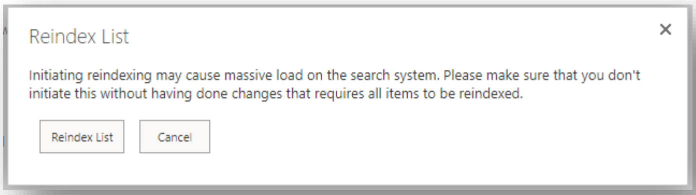
7. Select the property > Click 'OK'
8. Click 'OK' to save the RefinableString setting
9. Wait for the new RefinableString to crawl and show up in the search refiner web part

NOTE: For the RefinableString to crawl through, there must be at least one item that has a value of the mapped property
(i.e. to have news category shown as a refiner in the search centre, there must be at least one news item that has a news category)
After assigning a value to the item in the corresponding list/library, in the list/library view, Click 'Settings' > 'Library/List Settings' > 'Advanced Settings'

10. Scroll down to Reindex List > Click 'Reindex List'



11. Click ‘Reindex List’ again > Click ‘OK’



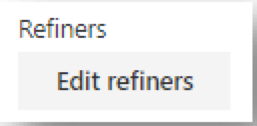
Web Part Refiner

Configurations

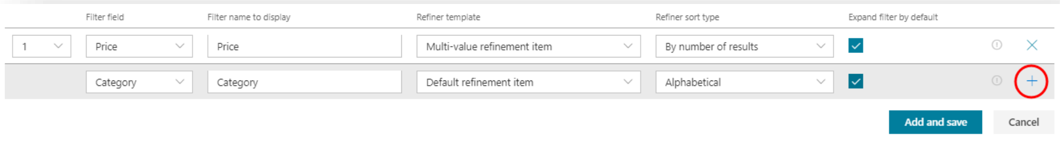
[How to add a Refiner](#)
[How to edit a Refiner](#)
[How to delete a Refiner](#)

How to add a Refiner

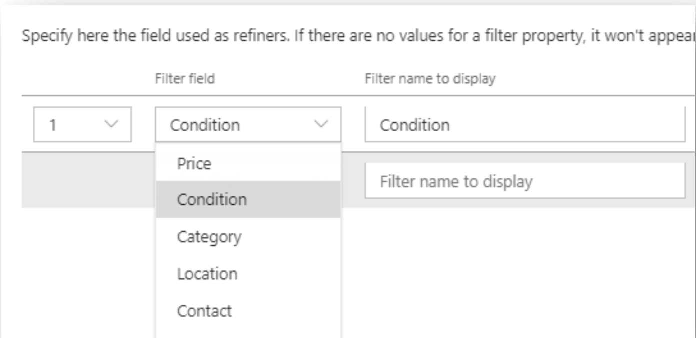
1. Go to the page with refiner in web part > Click ‘Edit’
2. Click the web part > pencil icon to edit the webpart
3. In the right panel, click ‘Edit refiners’



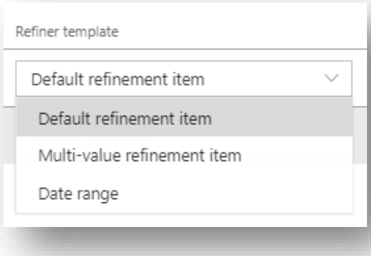
4. Enter the information of the new filter in the grey row



   a. Filter field is the columns of the corresponding list. Users can select any of them as a filter



b. Choose a refiner template

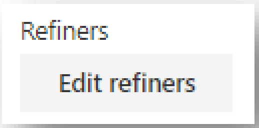


Default refinement item	Results will be filtered after every individual filter is selected
Multi-value refinement item	Results will be filtered after all filters are selected and the 'apply' button is clicked
Date range	For filtering dates

5. Click the ' + ' on the rightmost of a filter
6. Click 'Add and Save' to save the changes

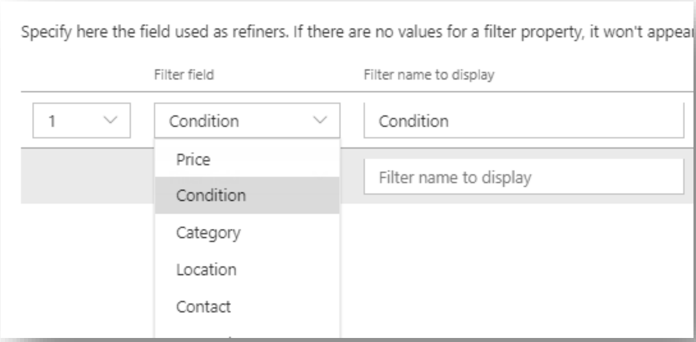
How to edit a Refiner

1. Go to the page with refiner in web part > Click 'Edit'
2. Click the web part > pencil icon to edit
3. In the right panel, click 'Edit refiners'

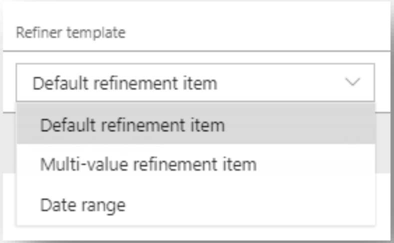


4. Edit the fields that need to be changed

1. Filter field is the columns of the corresponding list. Users can select any of them as a filter



2. Choose a refiner template

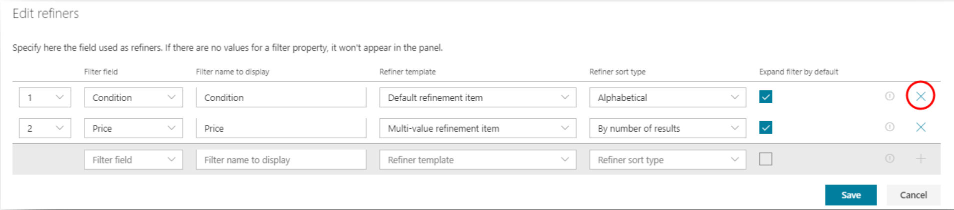


Default refinement item	Results will be filtered after every individual filter is selected
Multi-value refinement item	Results will be filtered after all filters are selected and the 'apply' button is clicked
Date range	For filtering dates

5. Click 'Save' to save the changes

How to delete a Refiner

1. Click the ‘ x ‘ on the rightmost of a filter



2. Click ‘Save”.