

# **Creating a new collaboration site**

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# Introduction

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Purpose of this document: Training material for creating a new collaboration site in an Omnia portal, mainly for self training.

Target group: All users.

## Overview

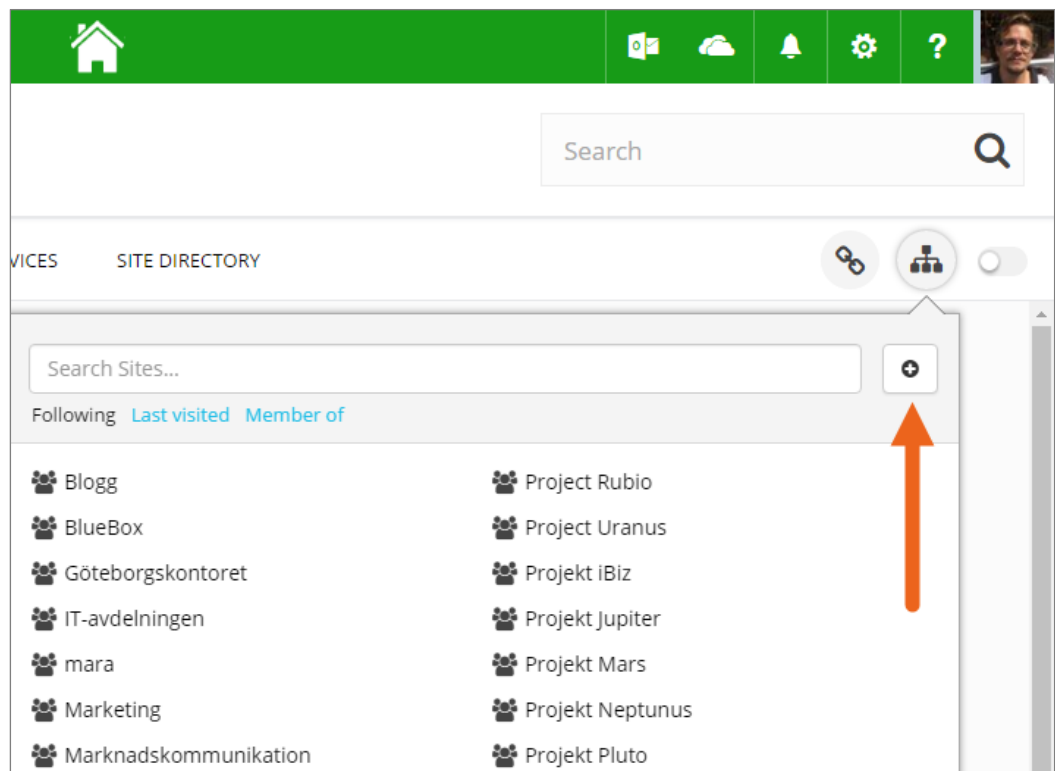
Normally, any user in an Omnia portal can create or request a new collaboration site. What you can do depends on your permissions and how the portal was set up. The process is the same, so the *Create a new collaboration site* section covers it all.

## Create a new collaboration site

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To create or order a new collaboration site, do the following:


1. Open **My sites**.
2. Click the **Create New Site** icon.




## Site template

Something like the following is shown:


Create Site - Select Template



Community Site



Department Site



Project Site

Next

An icon represents a type of collaboration site (a site template). Which site types you can choose from can be different from the image above.

3. Select type of site (click on) and click **Next**.

## Site information

The next step is to enter the following information:

Create Site - Site Information

Title

Description

Url

/sites/

Language

English (United States)

Time zone

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

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4. Type a title (name for the site).

The title will be used for the links to the site and as the heading for the site's start page.

5. Enter a description.

If you have to request a collaboration site, an administrator will check all properties for the site and approve or reject your site. In this case the description is important information for the administrator, so describe the purpose of the site as detailed as you can.

Create Site - Site Information

Title: Outdoor 2016 Event Group

Description: Site for collaboration withing the event group for the 2016 Outdorr event. As we produce a lot of documents for the event, we use a separate collaboration site for each year.

Url: /sites/ outdoor-2016-event-group  
✔ This is a valid url.

Language: English (United States)

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

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**6.** Edit the last part of the Url, if needed.

The Url is the web address to the site. You can edit the last part of the Url (but you normally don't have to) for example if the title is long and you would like a shorter Url.


**Note!**

No special characters should be used in the Url, or the Url may not work.

- 7.** Select language for the site.
- 8.** Select time zone if needed.
- 9.** Click **Next**.

## Site properties

As the next step a number of properties fields will be display. Different fields can be set up for different types of collaboration sites. Here's an example for a project site:




The screenshot shows a form titled "Create Site - Properties" with a close button (X) in the top right corner. The form contains the following fields:

- Project Manager:** A text input field.
- Start Date:** A date input field with a calendar icon on the right.
- End Date:** A date input field with a calendar icon on the right.
- Keywords:** A text input field with a blue icon (representing a list or search) on the right.
- Archived:** A checkbox followed by a dropdown arrow.

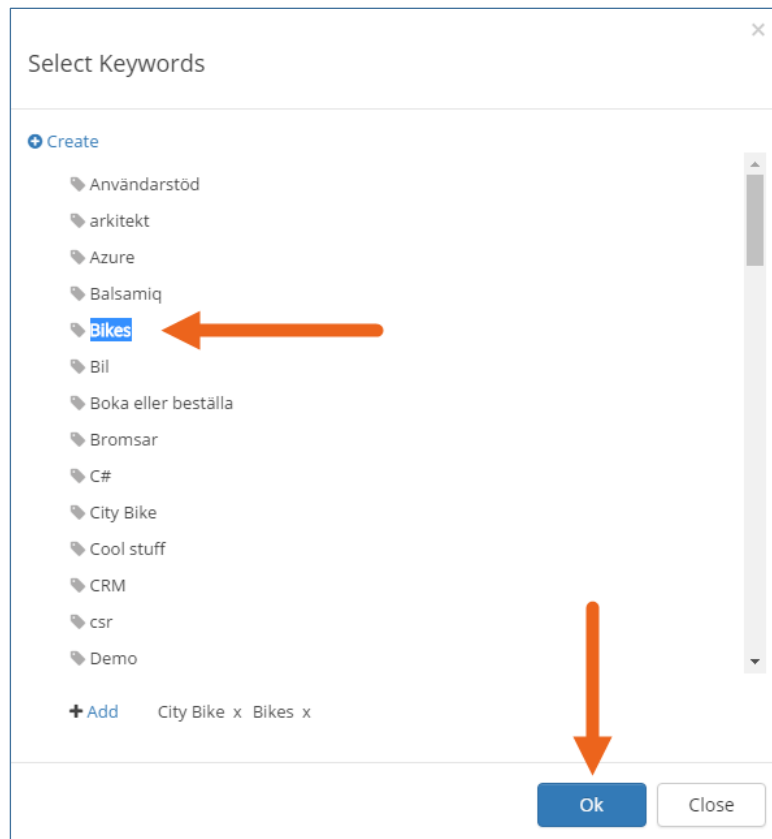
At the bottom right of the form, there are two buttons: "Previous" (disabled) and "Next" (active).

Keywords is a standard field that often is used. The purpose is to add keywords for search, but is normally not mandatory. To select one or more existing keywords, click the icon.



This screenshot is identical to the one above, but with an orange arrow pointing to the blue icon in the "Keywords" field, indicating where to click to select keywords.

1. Doubleclick all keywords you want to add, and then click **OK**.



You can add new keywords as well:

2. Type a keyword, and click **Add suggestion**.

10. Add information in the properties fields as needed and click **Next**.

Create Site - Properties

Project Manager

jörgen Bjerkesjö x

Start Date

2016-04-24

End Date

2016-08-31

Keywords

Event x Outdoor x

Archived

☐

Previous

Next

## Site users

Normally you can add additional users before creating a site, but you can also add additional users when the site is created. There can be other or additional user fields for a site. These fields also correspond to permission groups in the site.

*Owner* – the administrator of the site. Can also upload, create, edit and read documents and other information. As default, the user (you) creating or requesting a collaboration site is set as owner, but you can replace that name here if needed.

*Members* – can upload, create, edit and read documents and other information. This is the most common type of access to a collaboration site.

*Readers* – (also called Visitors) can read documents and other information, but not upload, edit or create.

11. Add users to permission groups, as you see fit, but mandatory is only one owner.

## Create or request

12. Click **Create** (or **Request**).

Create Site - Users

Owner

jörgen Bjerkesjö x

Members

Benny Eronson x Andreas Ekdahl x

Readers

Anders Fagerlund x |

Previous

Create

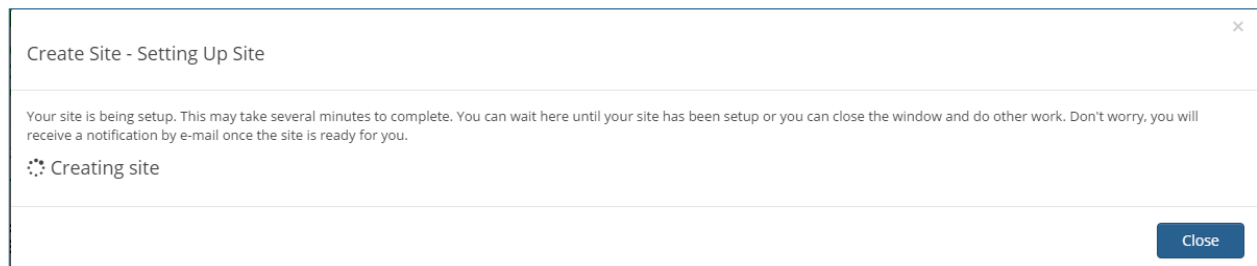


If you don't have permission to create a new collaboration site, the button will say **Request** instead.

Now, if you are requesting a site the request is sent to a portal administrator. The administrator will approve or reject your request. Either way, you will be notified.

If the site creation is approved, the site is created with no further notice, and you will normally receive an e-mail with a link to the site. If the site creation is rejected, you will be notified about the reasons, and will then have to make a new request.

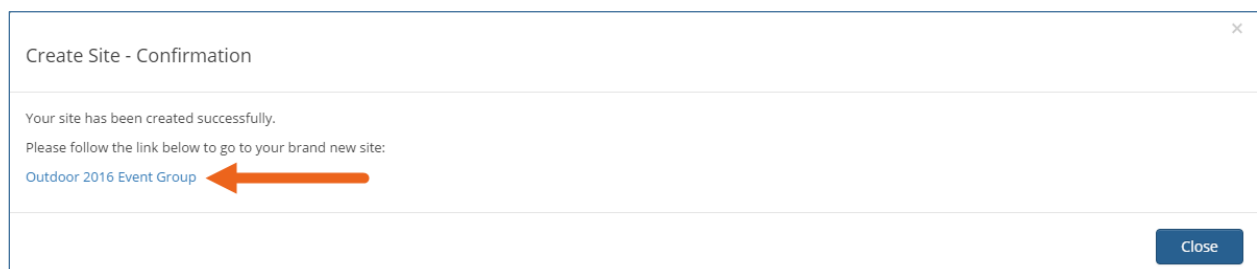
If you are permitted to create a collaboration site, the process starts.



It can take a while to create a site and as the information says, you can close this window and do something else while you wait.

If you wait for the creation process to be finished, a link is shown when it is.

**13.** Click the link to go to the site.

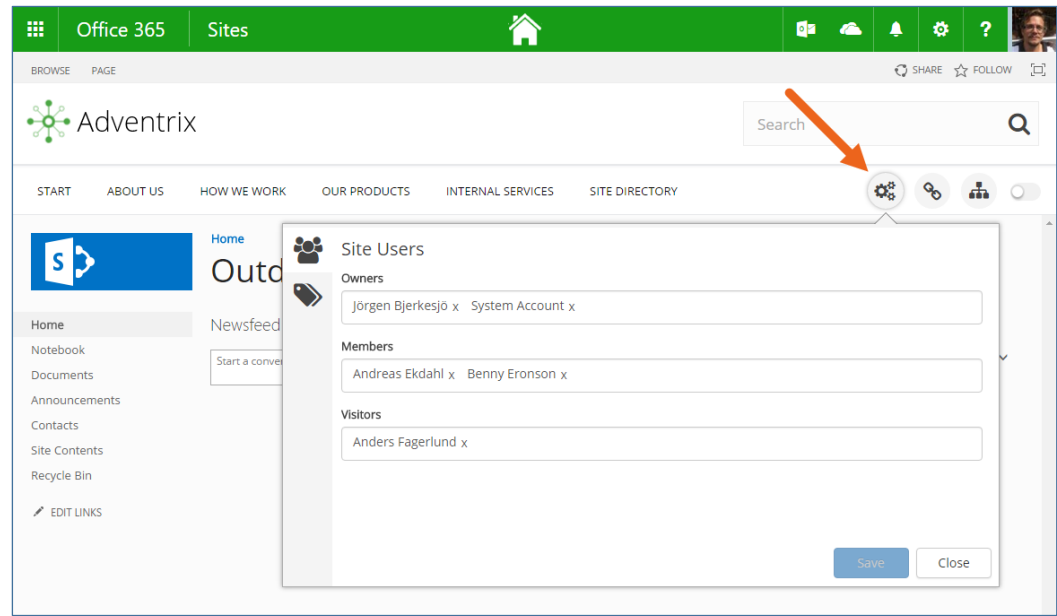


If you close the window, you can click the link in the e-mail, that is sent to you when the site is created.

# Add or remove users when the site is created

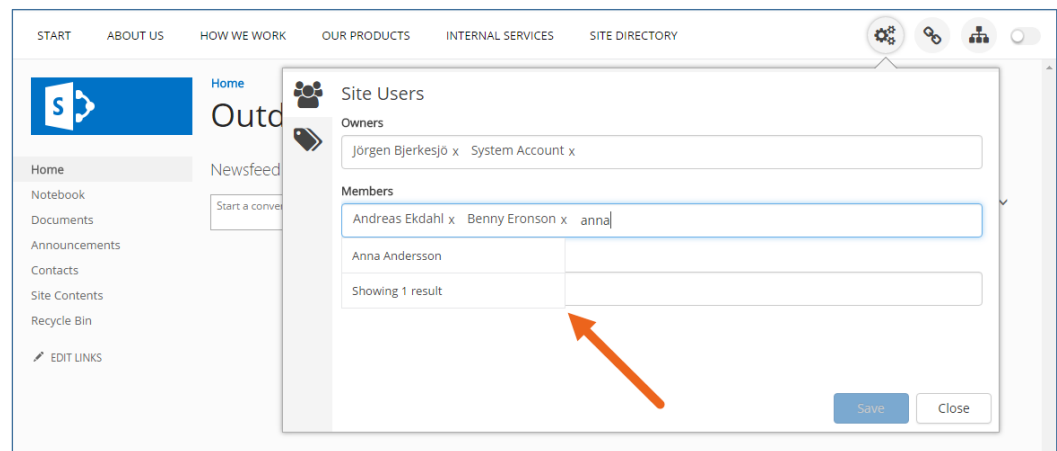
To add and remove users when the site is created, do the following:

**14.** Click the Site Quick Edit icon.



See above for a short description of the fields and permission groups.

**15.** To add a user to a permission group, start typing, and users corresponding to what you have typed is listed, for example:



Now you can select user by clicking in the list, or continue typing.

**16.** Add all users to the different groups the same way (you can add users anytime).

To remove a user from a permissions group (field), click the x.