Site Deployment Run File

Please Follow the Steps one at a time, do not proceed to the next step until the one you are working on has completed successfully.

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| Step # | Step | Comments/Notes | Status |
| 1 | AppManager URL |  |  |
| 2 | Site Collection URL |  |  |
| 3 | Install the Akumina Interchange AppManager in Site content |  |  |
| 4 | Add logged in user and any other appropriate user to the “Owners” group of the site collection (Site Settings > People and Groups, click on OWNER area to add) |  |  |
| 5 | Set Administrator group appropriately in site collection |  |  |
| 6 | Navigate to Site Settings > “Site Collection Features”* Deactivate “Limited-access user permissions lockdown mode”
 |  |  |
| 7 | Navigate to “Site Contents” and click on the AppManager App – [Note a new browser tab will open and it will take around 20 minutes to deploy the required lists] |  |  |
| 8 | Navigate to App Manager and “Settings”, Select Global Settings (pencil) |  |  |
| 9 | Global settings set the site collection URLThere can be no “/” on the end of the URLSee this as an example only: |  |  |
| 10 | Set SystemEmail – this is not required, and no email notification will be sent unless the client has provided a set of SMTP keys.  |  |  |
| 11 | Set the “Administrator Group” to the Owners group, this can be updated later |  |  |
| 12 | Set “Reporting Access Group” = Site Owners group this can be updated later  |  |  |
| 13 | SAVE and EXIT GLOBAL SETTINGS |  |  |
| 14 | Navigate to “Management Apps” > “Site Creator”, select site: “Digitial Workplace Core Site” or “Digital Workplace Foundation Site (v2)” or “Digital Workplace Foundation Site”-Set Select an Action = “Create New Installation”- set the Interchange URL to the suggested value (verify not spaces before or after the URL have been entered into the input field)- set “Interchange Query key” copy the value from the suggested with no spaces before or after the key-Click on Enable Azure AD |  |  |
| 15 | Appid (from Azure Graph App) = Client ID |  |  |
| 16 | AAD Client Secret (from Azure Graph App) |  |  |
| 17 | Tentant id or Directory ID (from Azure graph App) = Subscription Id |  |  |
| 18 | Enter SkypeApiKeyCC (If the site has been configured to use skype) |  |  |
| 19 | Enter SkypeApiKey (If the site has been configured to use skype) |  |  |
| 20 | Logo Image – Change this to the Appropriate Site logo |  |  |
| 21 | Select Theme – Set as desired |  |  |
| 22 | Enter a Google Map key if traffic is used on your site (this key is acquired by the client via google) |  |  |
| 23 | Select “Deploy All” (This will take over 1 hour to Deploy) |  |  |
| 24 | Acquire the Akumina Feature Key and turn it on in AppManager > Settings. Enter the Feature key |  |  |
| 25 | If Client has Multilingual key, then enable “Multilingual Feature” |  |  |
| 26 | If Client has “Microsoft Cognitive Service key” (for Auto Translation) on AppManager > Settings, “Enable Auto-Translate” and enter key |  |  |
| 27 | If Multilingual is enabled, visit “Management Apps” > “Site Creator”, set select site = “Add Multilingual Support to Existing Site”And click on “Deploy All” |  |  |
| 28 | If Multilingual is enabled Navigate to “Management Apps”, “Language Manager” and active languages as appropriate. NOTE: DO NOT DO THIS BEFORE ADDING MULTILINGAL TO SITE IN SITE CREATOR |  |  |
| 29 | Navigate to AppManager > Site Settings (dropdown on user profile) and click on the Authentication Token button: |  |  |
|  | **After deployment has been Complete Configure the site** |
| 30 | Navigate to Site Settings > Search Scheme edit managed Property:  LastModifiedTime - Leaving Only Basic:14 - *in Mapped to Crawled Properties*, and SAVESee <https://community.akumina.com/knowledge-base/foundation-site-installation/> search for:Setting up the Search Schema for the Document Summary List |  |  |
| 31 | Setup Search Scheme for site search:

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| --- | --- | --- |
| **New Manage properties to Create** | **Managed Property Characteristic – to check** | **Add a Mapping** |
| PageDataSiteId | Searchable, Queryable and Retrievable | ows\_PageDataSiteId |
| PageDataTitle | Searchable, Queryable and Retrievable | ows\_PageDataTitle |
| AkLanguageId | Searchable, Queryable and Retrievable | ows\_AkLanguageId |
| ImageParentLink (for Doc Viewer) | Searchable, Queryable, Retrievable and Complete Matching | ows\_ParentURL |

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| 32 | Navigate to Site Settings > Site app permissions, and trust workflow For specific instructions see this page<https://community.akumina.com/knowledge-base/foundation-site-installation/>Scroll down to bottom or search for “Trusting the Workflows Associated with Forms” copy the xml in the left column | <AppPermissionRequests><AppPermissionRequest Scope="http://sharepoint/content/sitecollection/web" Right="FullControl" /></AppPermissionRequests> |  |
| Streams Widget |
| 33 | If you are using a Streams widget, set the channel appropriately[{"ChannelName":"Global Videos","ChannelId":""},{"ChannelName":"Company","ChannelId":""}] |  |  |
| Step Plan Configuration |
| 34 | Adding Step Planner to a Site:Navigate to AppManager > Setting > “Management Settings” (click on pencil)* Click on +
* Set app name e.g. “Step Planner”
* Select App Type = “Step Planner”
* If desired reedit the app and set the permissions to this app Accordingly.
 |  |  |
| 35 | Create a Step Plan and update a Step Planer Widget instance with the correct plan id see:<https://community.akumina.com/knowledge-base/step-planner-administrators-guide/>for additional information.Add the Step Plan widget to the appropriate page on your site the page must exist in the site in which you created the plan |  |  |
| 36 | Navigate to the front-end page, bring up the debug pane and clear all cacheAnd do a CNTRL+F5 |  |  |
| 37 | **Step Plan Manual Configuration use SharePoint Retention Policy** For clients that want to have completed plans deleted automatically, set up a retention policy on the content type so that the plans can be deleted by upon completion automatically by SharePoint.* Navigate to Site Settings > Site Content Types
* Select content type = **AkuminaStepPlanInstance**
* Click on the “**Information management policy settings**”
* Click on “**Enable Retention**”
* Click on “**Add A retention stage…”**

Note: For ING they want items deleted 1 day after the instance is complete* Set the following:
* Event = “**This stage is based off a date property on the item**”
* Time Period = ExpiresOn + 1 days
* Action = Permanently Delete
* Click OK (on Edit Policy screen)

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