



Onboarding FAQs - Stage 3: Content Creation

Introduction

Welcome to the *Content Creation* section of the Claromentis onboarding FAQs. This section is designed specifically for customers who are currently going through onboarding or about to begin the process.

Here, you'll find answers to common questions about creating and organising content, populating your site, and preparing engaging resources and information for your end users.

You'll also note that these questions are separated into 5 sections for each stage of Claromentis onboarding:

1. [Kick Off & Install](#)
2. [Basic Training & Build](#)
3. [Content Creation](#)
4. [Pre-Launch](#)
5. [Go Live](#)

Content Creation

Who should complete the intranet build against the Minimum Requirements Checklist? How do we split the build between us?

- It's up to you to decide who should take the lead on this. We recommend everyone does the training at the very least, however on the actual build itself, it usually works best if 1-2 people work on this together.
- We've seen it working before with customers - where the team have decided amongst themselves who has the most capacity, and who will be actually overseeing the intranet and later taking the lead and managing the site once it is all set up.
- Our suggestion would be that this individual takes the lead on going through the steps in the first instance, and then they can explain to the others what they have done, and what they might be stuck on, so they can work through it together.
- However it is up to you how you would like to divvy this up, if you have 5 people who can be really engaged and take responsibility then great!
- Obviously it may not be possible for your whole team to do everything at the same time, so we've had some clients start the build together on a zoom call, or share recordings of them building it out for others to watch and stay updated.

What is the purpose of the "Minimum Requirements Checklist"? Is it just to get us to test things out, or is this part of the final build/content creation process?

- In the first instance, the purpose of the checklist is to encourage you to try things out, familiarise yourself with the system, and get used to the set up.
- We do it this way to ease you into the system slowly, and ensure that you do not get overwhelmed by all the information.
- As such, we recommend starting this off just for testing. If we take the News Application as an example, you don't need to create 3 perfect news articles, you can just create 3 test ones, and delete them, to ensure you know how to do so when you know what content you want to add.
- However, if you feel confident with it and want to start fully building out the site with content that you will use when the site goes live, we would encourage you to! Some elements on the checklist, like "set up Holiday Planner", or adding in useful buttons/links will be the foundation of the final version of your site.
- Any outstanding steps on the checklist can be discussed in the next Onboarding Call, which will focus on Content Creation and a Q&A specifically

for this.

How do we contact you if we have any questions about the minimum requirements checklist and the content creation process?

- Please feel free to ask any questions on the "Topics" section of your Onboarding Project Dashboard.
- We will be able to respond either by replying to your comment with an explanation, sharing Knowledgebase articles, creating video demos, or scheduling a call to explain.

I can't tick off everything on the checklist in the timeframe, what do you suggest?

- If you are having trouble getting through the checklist, we'd suggest delaying the 3rd Onboarding Call, so that you have more time to build and play around with the system.
- If we need to move forward, please come to the call prepared with a list of questions or steps you are struggling with, so we can address this on the call. We'd recommend sending us a list of what you've had issues with beforehand, so we can ensure we have the best possible explanations for you on the call.

Can we integrate our existing document storage solution?

- Yes, we can do this by offering a couple of solutions to integrate your existing document storage systems with our platform:
 - **Fast Access Buttons:** Use our fast access buttons to link files from your existing document storage solution, providing quick and seamless access to your documents.
 - **Microsoft OneDrive Integration:** You can allow Microsoft OneDrive links in the Document Management System (DMS) by setting up API configuration between the two systems. While these documents won't be previewable due to security measures, they will link directly to the correct document in OneDrive. For detailed instructions, see here: [OneDrive Integration](#).
 - **Google Drive Integration:** Similarly, you can enable Google Drive links in the DMS by configuring the API between the two platforms. For guidance, view our Knowledge Base article: [Google Drive Integration](#).

How do I hide certain features from the intranet such as applications that are not being utilised?

- Go to Admin > Menu builder > Applications.
- Click the Hide 'eye' icon next to the applications you wish to hide.
- This will streamline the user experience and make the intranet more intuitive for your team.

How do I set up notifications for users to be notified of changes or announcements?

- The intranet provides configurable notification options that vary by application. Here's how you can set up notifications:
- Go to Communication > Notification preferences.
- Configure the notification settings for each application, choosing between in-system notifications, email notifications, or none.
- For email notifications, you can opt to send a digest, offering users a summarised overview of the notifications being pushed.
- For detailed guidance on setting up and managing notifications, please refer to this Knowledge Base article: [notification preferences](#).

We are about to start adding content, so how secure is our data, where is our data held and how long do you hold it for?

- For SaaS system customers, your data is securely retained throughout the duration of your contract tenancy. To ensure reliability and protection, your data is backed up each night.
- In the event of contract termination, your data will be retained for an additional 30 days after contract closure, after which it will be permanently deleted. This process ensures that your data is managed securely and in compliance with our data retention policies.

[Click here to access 4. Pre Launch FAQs](#)