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Introduction

Intended Audience
This document is intended for IT and Office 365 Tenant administrators.

Overview
Integrity Policy Management requires some minor configuration of your SharePoint Online tenant in order to get the full benefit of platform features of your SharePoint Online subscription.

If you require assistance configuring your tenant, Tallan offers support services at a standard hourly rate, and provides installation service for an affordable flat fee. Please contact Tallan Support at 860-368-3010 for assistance.

Installation Steps
Step 1: Retrieve Your Azure Active Directory Keys
Integrity Policy Management has a built in User Profile service that scans your Azure AD directory actively to detect changes in group membership. This allows Integrity Policy Management to automatically distribute policies and procedures to new employees as they are added to groups assigned to groups that are designated as required audiences for your policies and procedures.

In order to grant read access to Integrity Policy Management for your Azure AD directory, you must generate a client ID and key and supply them to the application. Note: this is not the only way to get to your Azure AD portal. If you are already inside the Azure AD portal, skip ahead to step 4.
Method 1: Access your AD Tenant

1. Log into your SharePoint Tenant

2. Click the app drawer at the top left of the window and select Admin

3. On the left navigation pane, expand Admin centers and select Azure AD
4. Click **Active Directory** in the left pane of the Azure Management site. Click the arrow next to your Active Directory domain.

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**Method 2: Access Your AD Tenant through the Azure Management Portal**

1. Navigate to [https://portal.azure.com](https://portal.azure.com)

2. On the left hand panel, click **More Services**, then select Active Directory.
Create and Retrieve your Azure AD Client ID and Key

3. Click **Applications** on the top toolbar

4. Click **Add** on the bottom toolbar.
7. Select Add an application my organization is developing.

8. On the Tell us about your application pane, enter “Integrity Policy Management”. Ensure Web Application and/or Web API is selected. Click the arrow at the bottom right.

9. In both the Sign-On URL and App ID URI enter https://policy.integrity.tallan.com and click the checkbox on the bottom right.

10. In the resulting screen, click configure on the top toolbar

11. Scroll down to the ClientId field and copy this value. This will be required when you register your tenant.

12. Scroll down to the Keys section. In the Select Duration dropdown, select 2 years.
13. Click the **Save** button at the bottom of the screen.

14. After clicking **Save** your key will appear in the **Keys** section. Click the **Copy** button next to the key to copy it. Copy this into Notepad or a text editor for entry into the app setup form. **Note:** Once you leave this page you will not be able to retrieve the App Key again. Make sure you save this value in a safe place. Losing the value will result in needing to re-generated another key and updating the Integrity Policy Management app accordingly.

15. After obtaining both the keys, scroll to the bottom of the page if not already there to the section **Permissions to Other Applications.** Hover/Click **Windows Azure Active Directory** to expose the input
fields and check **Read directory data** under **Application Permissions**.

16. Click **Save** once more.

Step 2: Register your Tenant

**Before proceeding, it is recommended to activate the “Document Id Service” Site Collection Feature in your site collection. This should help quicken the installation process. (Note: The application will automatically activate this feature, however, it could take up to 24 hours for SharePoint to provision the necessary infrastructure the Document Id Service requires. Enabling this feature manually has yielded much quicker results.)**

1. Log into your site collection and navigate to the ‘Site Settings’ page.

2. Under “Site Collection Administration”, click the “Site Collection Features” link

   ![Site Collection Administration](image)

3. Enable the “Document ID Service” feature
4. After the feature is enabled, you should see the “Document ID settings” link in the “Site Collection Administration” section. Click this link.

5. If the field “Begin IDs with the following characters” has been generated with a random string, SharePoint has provisioned the necessary infrastructure. If this field is blank you can still proceed with the installation noting that the provisioning can take up to 24 hours. (More information on the how the Document ID service is provisioned can be found here.)

After configuring your environment, you must register your tenant through the wizard in the Integrity Policy Management application.

1. Access Integrity Policy Management by navigating to the site collection the application was installed it and launching it. If Integrity Policy Management is not currently in your left navigation, it can be launched via Site Contents.
2. The application will present you with a registration wizard, as seen in the screenshot below. Click Next.

3. On the Step 1 screen, enter your Customer ID if you have been provided with one. To start a new Trial without a Customer ID, click Start Trial.
4. For Step 2, enter information for your company name and primary customer contact information.
5. **For Step 3**, enter in your company address information.
6. For Step 4:

   a. For Azure AD Tenant enter the domain you use for Azure Active Directory. If you are using DirSync, this will likely be your company domain, i.e. contoso.com. If you are using an Azure AD tenant without DirSync, this will likely be tenantname.onmicrosoft.com.

   b. For Owner, enter the login name of a Site Collection Administrator for the SharePoint site. (Login name is most commonly the user’s email address)

   c. For Azure AD Client ID enter the ClientId value obtained in Step1: Retrieve Your Azure Active Directory Keys above.

   d. For Azure AD Key enter the key value obtained from the Keys section in Step1: Retrieve Your Azure Active Directory Keys above.

   e. When done, click Submit
Your tenant will begin provisioning immediately. Note: While your tenant is provisioning, Integrity Policy Management will show a wizard window to all users attempting to access the system. Once the app is finished installing users will automatically be able to access the home page and the wizard will no longer appear. (See Below)

Step 3: Monitor Tenant Provisioning

While your tenant is provisioning, you can monitor provisioning progress by accessing the administration page.

1. Access Integrity Policy Management through your SharePoint portal.
2. Once in the application, navigate to the admin page using the following URL:

https://policy.integrity.tallan.com/home/admin

3. Expand the provisioning log by clicking the expansion error next to the date. On the left pane, monitor the provisioning status. When the status is “Provisioned” the tenant has been provisioned. Additionally, the provisioning wizard will disappear on the main page of the site once the tenant provisioning has completed.

4. After the site has been provisioned, the next step in the installation will be a synchronization of the user profiles followed by the activation of the Document ID Service discussed above. Once everything has finished, the Installation Summary will show all steps as completed.
Note: if your tenant takes more than 24 hours to provision, please contact Tallan Integrity Support.

Step 4: Configure Managed Metadata
Integrity Policy Management uses Managed Metadata to support tagging your policies and procedures with categories that aid end users in finding policies quickly and efficiently. Some configuration is required prior to launching Integrity Policy Management in your organization.
Create Term Sets

1. Log into your SharePoint Tenant

2. Click the app drawer at the top left of the window and select Admin

3. On the left navigation pane, expand Admin Centers and click SharePoint

4. On the left navigation pane, click Term Store
5. Right-Click the top node under **Taxonomy Term Store** and click **New Group**. Name your new group something recognizable like **Integrity Policy Management**.

6. Right-Click the term group folder created in the step above and select **New Term Set**. Name your term set.

7. Right-Click the term set you created to begin adding your categories. You should add items here that describe the departments and types of documents you will be storing in Integrity Policy Management. The term set should be hierarchical in nature to group together terms by department or document type. (See below for example).

8. Click the term group folder in the left hand pane. In the General tab on the right, add the account names of the users in your organization you would like to grant edit rights to into the **Group Managers** view and click **Save**. These people will have the ability manage the term set from the
site collection where you have installed integrity policy management, and they will have the ability to add contributors who can edit the term set as well. For detailed instructions, see Grant Permission to Term Group Managers below.

Attach Term Sets to Category Fields

1. Log into the SharePoint site where you have deployed Integrity Policy Management.

2. Click the gear icon at the top right and click Site Settings

3. Under Web Designer Galleries, select Site Columns
4. **Under the Blueprint Core Columns category, select PnP Category**

5. **Scroll down to Term Set Settings** and select the term set you created in the steps above:

6. **Scroll to the bottom of the page and click OK.**
Step 5: Configure Search

Minor configuration of the Search Service is required to enable your users to filter policies and procedures by tags or categories.

Step 5.1: Upload Test Documents

Upload at least one document and publish it using the instructions as detailed in the User Guide.

Wait approximately 15 minutes for search to crawl the document content.

Step 5.2: Configure Managed Properties

Navigate to Search Schema settings

1. **Log into your SharePoint Tenant**

2. **Click the app drawer at the top left of the window and select Admin**

3. **On the left navigation pane, expand Admin Centers and click SharePoint**
4. On the left navigation pane, click **Search**

5. Click **Manage Search Schema**

*Configure Category Refiner*

1. In the **Filter** group, enter **RefinableString00** into the **Managed Property** text box and click the green arrow.
2. Find **RefinableString00** under **Property Name** and click it.

3. Scroll down to **Mappings to crawled properties** and click **Add a Mapping**

4. In the **Crawled Property Selection** dialog, type **pnpcategory** into the **Search for a crawled property name** textbox and click **Find**.
crawled property selection

SharePoint admin center

Select crawled properties to map to RefinableString00(Text)

Filter on a category:

Search for a crawled property name:

Find

Select a crawled property:

ows_PnPCategory
ows_taxid_PnPCategory
PnPCategory
5. Select ows_taxid_pnpcategory from the displayed list then scroll to the bottom of the dialog and click OK.

6. Scroll to the bottom of the window and click OK.

Configure Title Property

1. In the Find group type “title” into the managed property textbox and hit enter.

2. Click title in the results list below.
3. Scroll to the **Mappings to Crawled Properties** section. If the two entries for **MetadataExtractorTitle** are not at the bottom of the listbox, select each and click **Move Down** until they are at the bottom.

4. Scroll to the bottom of the window and click **OK**

**Force a Recrawl**

1. Log into the site where you deployed Integrity Policy Management.

2. Click the gear icon at the top right and click **Site Settings**

3. Under **Search** select **Search and Offline Availability**
4. **Under Reindex Site** click the **Reindex Site** button. Click **Reindex Site** on the resulting dialog. Wait approximately 10 minutes for search to crawl the content.

5. **Launch the application and click Search** on the left navigation. **You should see the category filters underneath Policy and Procedure**.
Application Administration

Add a Landing Page and Link to the Application

Upon installing the app, the app icon will be available in the Site Contents of your SharePoint site. Clicking the app icon will launch the app. However, if you prefer to avoid the extra step of navigating to the Site Contents page, this section will describe one way to create a landing page with a link to the app. The steps could differ depending on the Site Template you used when creating the Site Collection. (The following steps are assuming the use of a standard Team Site.)

1. (If you are already on your home page, you want to modify skip to step 3.) Navigate to the Site Contents of your web and click into the "Site Pages" document library.
2. Depending on if you modified your Site Pages library, your results may be slightly different. This guide will use the "Home" page as the landing page, but you can choose whichever page works best for your purposes.

3. Once on the landing page, click into the Page tab and click 'Edit'. This will turn the page into edit mode.

4. For the sake of this walkthrough, we have deleted any default content such that we have a blank page. After deleting any default content, we have added some sample text which will include the hyperlink to the app. Feel free to customize this page and text in any way that works best for you.
5. Once you have some content in place we will convert a section of the text to a hyperlink. To point this text to the app, we will turn our sample text "Click here to launch the app" to a hyperlink. Highlight your text as shown above and click into the "Insert" tab and click the "Link" option. Select "From SharePoint"

6. A popup should appear showing the contents of the SharePoint site. Find the app in the list and select the app by clicking it. The "Location (URL)" should change to something of the effect /sites/YourSiteName/IntegrityPolicyManagement. Click "Insert"

7. If done successfully, you should see the link styled as a hyperlink similar to the image below. (The styles may differ depending on how you have branded your SharePoint Site.)

Tallan's Integrity Policy Management
Click here to launch the app.
8. Once you are finished editing the page, click the "Page" tab in the top left and click "Save"

9. Once the page has been saved, click the link and confirms it navigates to the app correctly.

Configuring Default Task Completion Times by Term

1. Log into the site where you have deployed Integrity Policy Management.
2. Click the gear icon at the top right and click Site Contents
3. To define default schedules for policies, select **PnP Policy Notification Schedules**. To define default schedules for procedures, select **PnP Procedure Notification Schedules**.

4. Click **New** to add a new schedule.
   a. In the **Title** field, add the name for the schedule.
   b. In the **Period** field, add the number of days, weeks, or months you’d like to default to.
   c. In the **Units** field, select Days, Weeks, or Months
   d. In the **PnP Category** field, select the category you’d like to assign the default schedule for.
   e. Click **Save**.

**Force User Profile Synchronization**

1. Log into the SharePoint site where you’ve installed Integrity Policy Management and launch the application.
2. Once launched, navigate to the administrator screen by manually navigating to the following URL:

   https://policy.integrity.tallan.com/home/admin


4. Refresh the page. The Last Synced indicator will change when the sync has completed.

Force a Recrawl

   1. Log into the site where you deployed Integrity Policy Management.

   2. Click the gear icon at the top right and click Site Settings
3. Under **Search** select **Search and Offline Availability**

4. Under **Reindex Site** click the **Reindex Site** button. Click **Reindex Site** on the resulting dialog. Wait approximately **10 minutes** for search to crawl the content.
5. Launch the application and click **Search** on the left navigation. You should see the category filters underneath **Policy** and **Procedure**
Grant Permissions to Term Group Managers

In order to allow term group editors to edit managed term sets through the site collection where Integrity Policy Management is installed, you must add users to the Group Managers field in the Term Store section of the SharePoint Online administration site.
1. Log into your SharePoint Tenant

2. Click the app drawer at the top left of the window and select **Admin**

3. On the left navigation pane, expand **Admin Centers** and click **SharePoint**

4. On the left navigation pane, click **Term Store**
5. Under **Taxonomy Term Store**, click the Integrity Policy Management term group folder.

6. In the right hand pane, add users to the **Group Managers** section that you would like to administer the term set.

7. When done, click **Save**.