

# State of Illinois Web Content Management (WCM) Guide

For SharePoint 2010 Content Editors

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State of Illinois  
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## Logging into your site

Your site has two different URL's assigned to it, one for the public and the other for editing. Both of these URL's point to the same database, so they are in effect the same site, the only difference is one of the URL's requires you to login allowing you to edit.

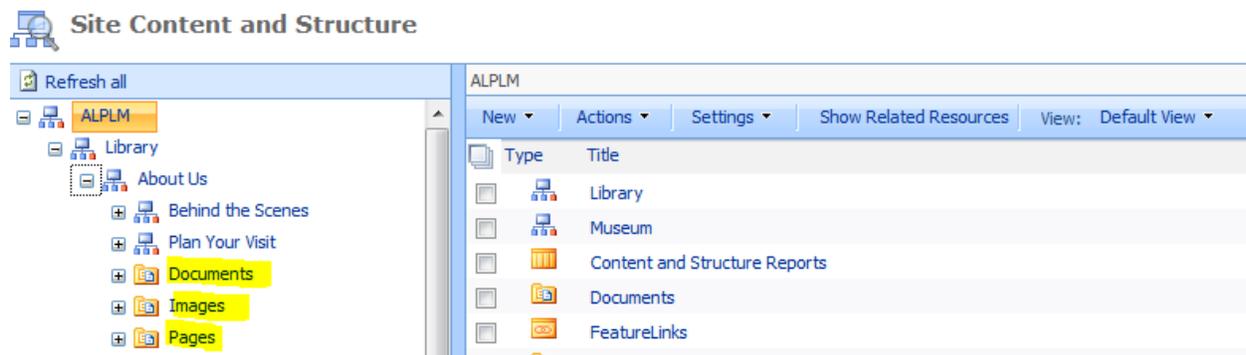
- <http://www.illinois.gov/yoursite> is an example of the URL the public will use to access your site.
- <http://wwwqa.illinois.gov/yoursite> is an example of what the URL will be in order to login and edit your site.

If your ID is the same as what you login to your PC with, you should automatically be logged in. You can tell you're logged in by seeing the welcome message in the top right hand corner of the screen.

## General Site Structure and Default Libraries

You can view your entire sites structure by going to Site Actions – Manage Content and Structure from anywhere within your site. This will show you the entire tree view structure of your site. From here you can do several things associated with global site management, like moving and approving content in mass.

This is a good place to see how content is organized within your site. You will note that every sub-site has its own Documents, Images, and Pages libraries. This allows you to better organize your content and to separate out your permissions. A group can be assigned permissions to only be able to edit content within a specific sub-site. From there they would have access to their own libraries to store any content that they need.

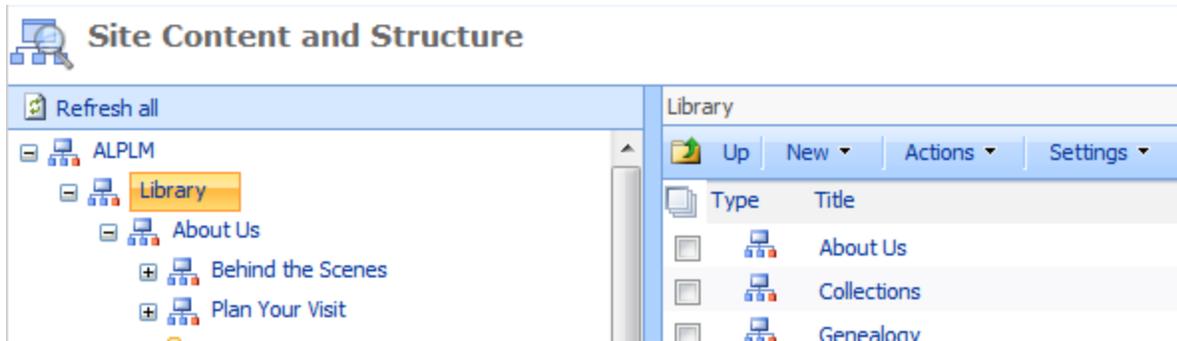


In the image above, the icon next to Library and About Us indicates a site, and the icon next to Documents and Images indicates a library.

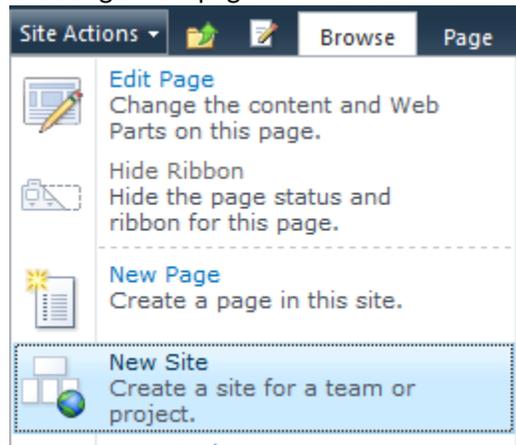
## Creating Sub-sites

As was described earlier, creating sub-sites is a good way to organize your content and to separate out your permissions. Sub-sites also play a big role in how your local navigation and breadcrumbs work.

In the image below, ALPLM is the root site, Library is a sub-site of ALPLM, and About Us is a sub-site of Library.



Creating a sub-site is similar to creating a new page. From the Site Actions Menu select New Site.



On the New SharePoint Site dialog select the SOI Publishing Web Template and fill in the following fields and click Create.

- **Title** – Short concise title for the site, this will show up at the top of the browser and in navigation.
- **URL Name** – This should be short and simple, without spaces or special characters. This is the URL that will be used to access your site.

### Understanding site permissions

Permissions within SharePoint can be assigned at any level within the site, from the top site all the way down to a specific page if you want. But to ease the management of permissions you should only assign them at the site level, and only when necessary. When you create a new site you can choose to inherit the parent sites permissions or to create unique permissions. You should only create unique permissions when they are necessary. For example, if you have a sub-site that you want to assign permission to a different group of users to manage, you would create unique permissions for that site.

### Standard Groups

There are three standard groups created when you assign unique permissions to a site, they are:

- **[Site Name] Visitors** – This group would give read permissions to a site, but because we normally have anonymous access enabled, it is of no value to us.

- **[Site Name] Members** – This group gives Contribute (edit) permissions to its members. These users will be able to create, edit, and delete content. They will not be able to approve content.
- **[Site Name] Owners** – This group gives Full permission to its members. These users will be able to do anything within the site that they have permissions.

### Site Collection Administrators

Users that are designated as Site Collection Administrators have full permissions to any site with the entire collection. There should be only a few users that have over all permissions to everything.

### Understanding Navigation

Navigation can be complex; there are various things that affect how navigation is controlled and displayed. I will only cover the basics of it here.

There are two different Navigation areas associated with most sites.

- **Global Navigation** – This is normally horizontally along the top of the page and remains consistent as you move through the site.
- **Current Navigation** – This is normally a vertical menu either on the left or right side of the page and will change based on what section of the site you are in. This is sometimes called the Quick Launch area in SharePoint.

Navigation is accessed via Site Action – Site Settings then selecting Navigation under Look and Feel.



From here you can decide whether pages and sub-sites automatically show up in Navigation, or if you will manually control them. You can also control the order or visibility of navigation items.

### Understanding Versioning and Approval

All items in a SharePoint WCM site have a minor and major version associated with them. A page with a version number of 5.2, would have a major version of 5 and a minor version of 2. Only approved major versions are available to the public to view. Minor versions can only be viewed by Content Editors. This allows you to make changes to a page or document and have other editors/approvers review your change prior to making a Major version and approving it for the public.

Content Type: Welcome Page  
Version: 2.2  
Created at 4/9/2013 12:46 PM by Seagle, Bill  
Last modified at 6/25/2013 12:27 PM by Seagle, Bill

Close

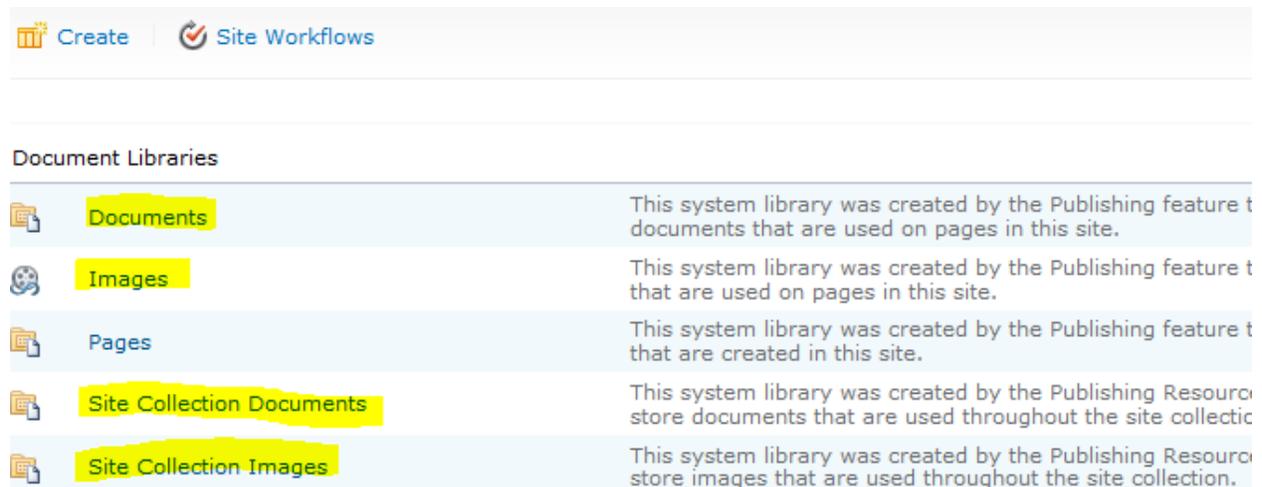
## Understanding check-in/check-out

In order to ensure that only one person is working on a particular page or document at a time, SharePoint will check-out an item to you when you editing it. That item will not be available to anyone else to edit while you have it checked out. Changes that you make to the item will not be visible to anyone until you check it back in.

## Uploading Documents and Images

Each sub-site has its own libraries to store documents and images in. You must first go to the sub-site that will be using the items, then click on Site Actions – View All Site Content and click on either Documents or Images depending on which one you are uploading.

If a document or image will be used in multiple sites, then you should store them in the Site Collection Documents or Site Collection Images libraries that are located at the root of your site.



The screenshot shows the top navigation bar with 'Create' and 'Site Workflows' options. Below is a 'Document Libraries' section with a table of libraries:

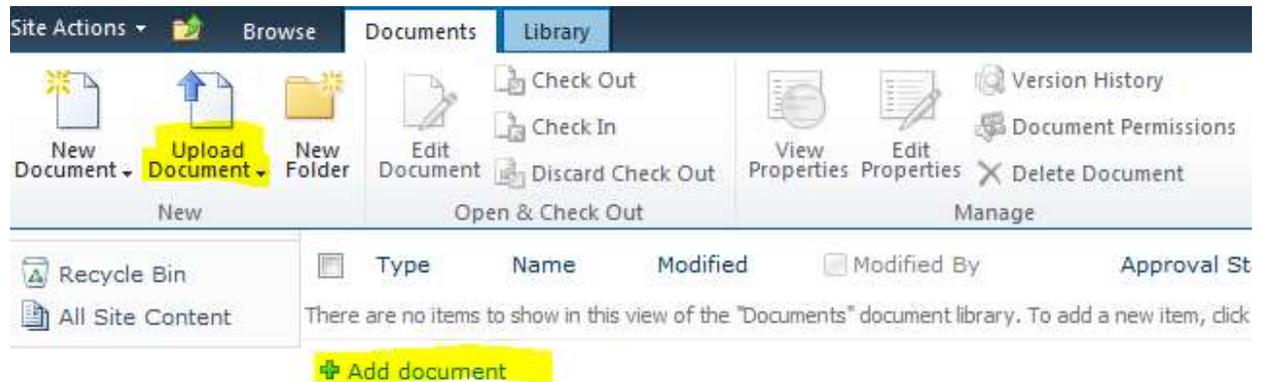
Library Name	Description
Documents	This system library was created by the Publishing feature that are used on pages in this site.
Images	This system library was created by the Publishing feature that are used on pages in this site.
Pages	This system library was created by the Publishing feature that are created in this site.
Site Collection Documents	This system library was created by the Publishing Resource store documents that are used throughout the site collection.
Site Collection Images	This system library was created by the Publishing Resource store images that are used throughout the site collection.

In order to get an approved document or image into SharePoint that is available to the public, there is a three step process.

1. Upload the document and check it in
2. Publish a major version
3. Approve the document

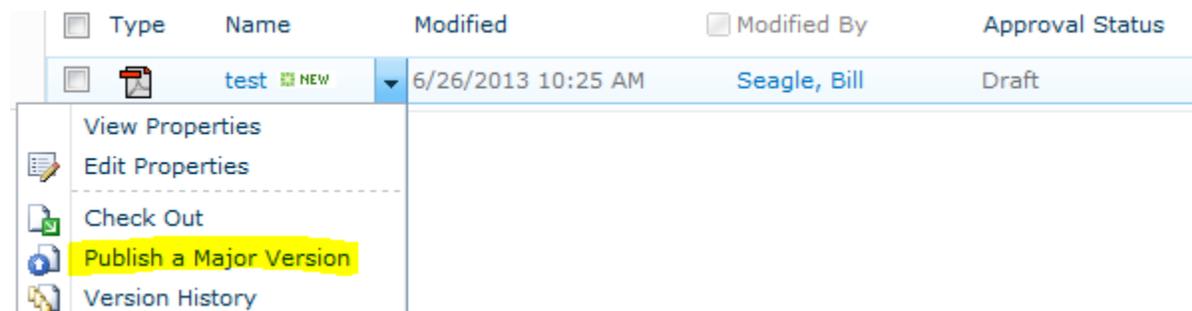
### Step 1 - Upload the document and check it in

From the library, click on Upload and you will be able to browse to the file that you want to upload. Once you have selected the document or image and have uploaded it, you will need to check it in.



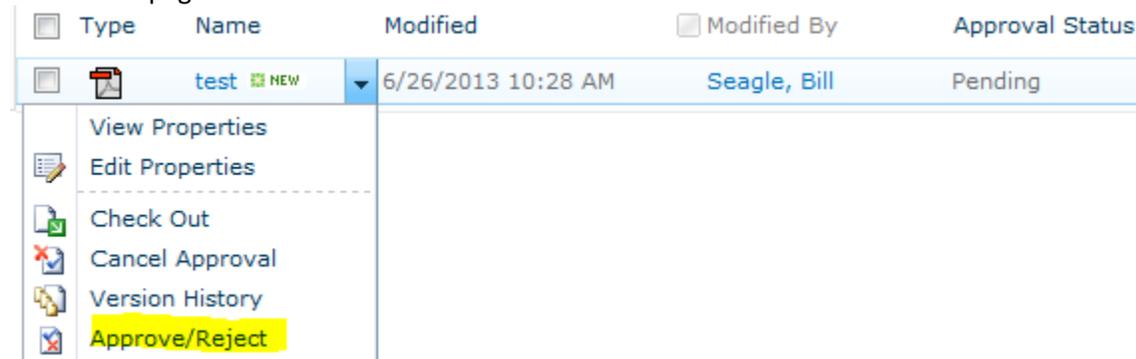
### Step 2 - Publish a major version

After the document is uploaded and checked in, it will be a draft version. If you mouse over the file name and click the dropdown arrow, you will see a menu of choices. One of those choices will be to "Publish a Major Version", select it. You can enter comments if you like, and then click OK. The document status will change to Pending; it is waiting on approval to become a major version.



### Step 3 - Approve the document

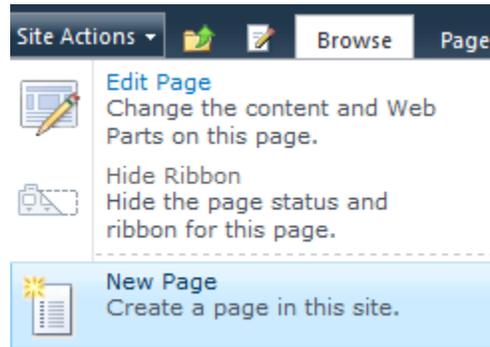
Now that the document is pending approval, you can approve it. Once again mouse over the file name and click the dropdown arrow. This time in the menu you will see a choice to "Approve/Reject", select it. You will be presented with options to Approve, Reject, or to leave the document Pending. Select Approved and click OK. The documents status will now change to Approved and is now available to the link to on a page.



## Creating new pages

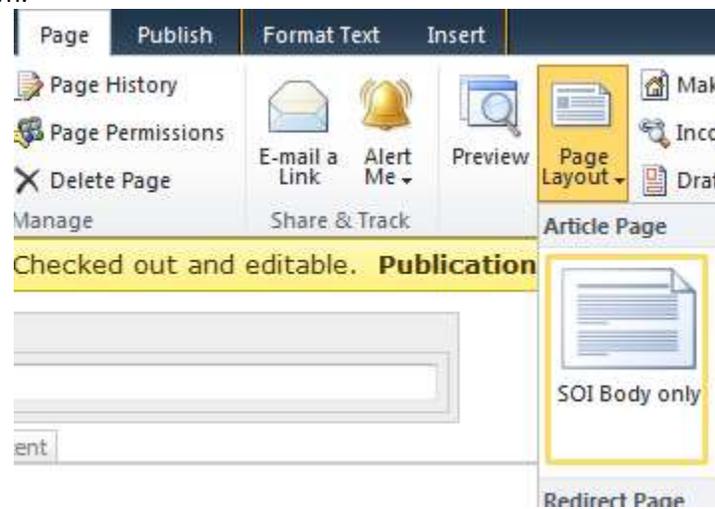
We work with pages differently than we do documents or images. Like documents or images, pages are stored in a Pages library located within the site that it is associated to. But unlike documents or images, we do not upload pages, or even do common page management from the Page library. Instead we create new pages from the Site Actions Menu.

To create a new page, click on Site Actions and then New Page.



After selecting New Page, a dialog box will appear asking you for the page name. Enter a page name and click on Create.

The new page will be created with the default page layout that is configured for that site. You can change the layout by first selecting the Page tab at the top of the page then selecting a layout from the Page Layout dropdown.



- **Page Layout** – Determines the layout of the page and whether you can add web parts or not. The common layouts are;
  - **SOI Body only** – This will be used 95% of the time. It does not allow web parts, and is used primarily for static content.
  - **SOI summary links** – This layout has a section for content, various web part zones and in addition has a right hand column for summary links.
  - **A SOI Web Part zone** – This layout also has a section for content and various web part zones, but does not have the right hand column.

- **SOI Splash page** – This layout is almost always used on the home page of a site. It will not display the site title, breadcrumbs, or local navigation.

**Note: SOI above stands for State of Illinois**

## Editing pages

In order to edit a page, the page must be first put into edit mode. You can do that by navigating to the page that you want to edit, and selecting Edit Page from the Site Actions Menu.

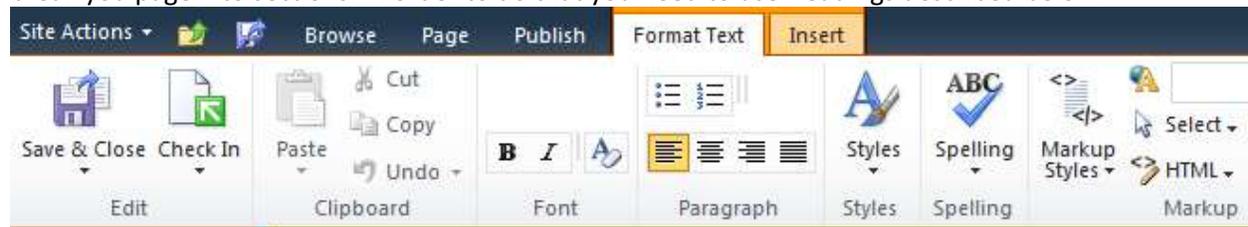


When you do this, the page will be checked out to you and you can make changes. Only one person can have a page checked out at a time, so while you have it checked out no one else can edit it.

## Ribbon Bar

SharePoint 2010 now uses a Ribbon Bar similar to other Office products that is used for various things, including editing page content. The Ribbon bar has common features that you would expect to see in other editors like Microsoft Word, but not all of them. Features that people initially look for that are missing are font type and font size. These features have intentionally been removed in order to ensure the site is consistent across all pages.

The default font type and size for your site has been determined by your agency during the design phase and should be the same for all pages. The most common reason to change font size on a page, is to help break your page into sections. In order to do that you need to use Headings described below.



## Using Headings to outline your page

When you put content on your page, you should organize your content into an outline. Most users of your site will not read all of the content on any of your pages. They will instead browse the heading to determine if the information that they are looking for is contained on the page or not. If they find a heading that may contain what they want, they will then scan the sub-headings of that section, and then finally read the content.

Most people will want to create this layout only using things like color, underline, and bold. If just did that, then a blind person would not be able to scan the page the same way that a sighted person does. The assistive technology that a blind person uses to read a page has the ability to scan headings that are

properly marked up. For this reason, and for site consistency, you will want to use the Markup Styles dropdown provided in the toolbar to mark up your outline.



The page title is automatically set to a Heading 1, so if you use an outline on your page you would start with Heading 2's, then Heading 3's if necessary for additional sections under a 2.

### Writing for the Web

When you are creating a page, don't get carried away with writing tons of content that users will most likely never read. A good reference guide to help you create your page can be found on the [Writing for the Web](#) page at [Usability.gov](#).

### Saving, Checking In, and Publishing Pages

When you have completed working on a page and are ready to save your progress, there are three things that can be done:

- **Save a page** – Just saves your work, but does not check the page in, so others will not be able to see your progress or edit the page.
- **Check In** – Saves your page as a minor version that others can see and work on the page. If the page is just checked in, the public will not see the changes yet.
- **Publish Page** – This will create a major version of the page and approve it. The public will be able to see any changes you have made.