

# State of Illinois Web Content Management (WCM) Guide

For SharePoint 2013 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.

- <https://www2.illinois.gov/sites/yoursite> is an example of the URL the public will use to access your site.
- <https://www2qa.illinois.gov/sites/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.

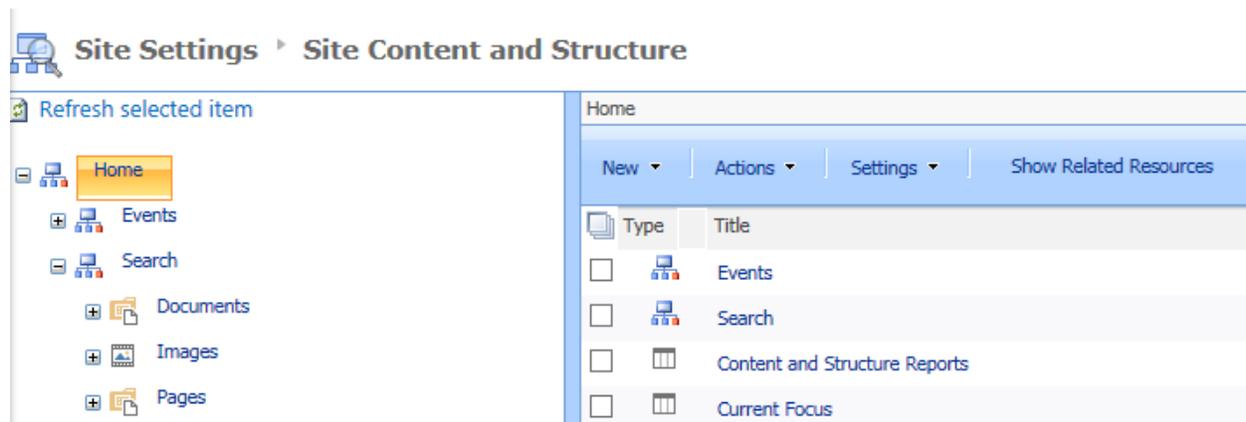
## General Site Structure and Default Libraries

You can view your entire sites structure by doing the following:

1. From anywhere within your site click **Settings**  in the top right corner and select **Site Settings**
2. Click on the "Content and structure logs" link under Site Administration

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 subsite 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 subsite. From there they would have access to their own libraries to store any content that they need.

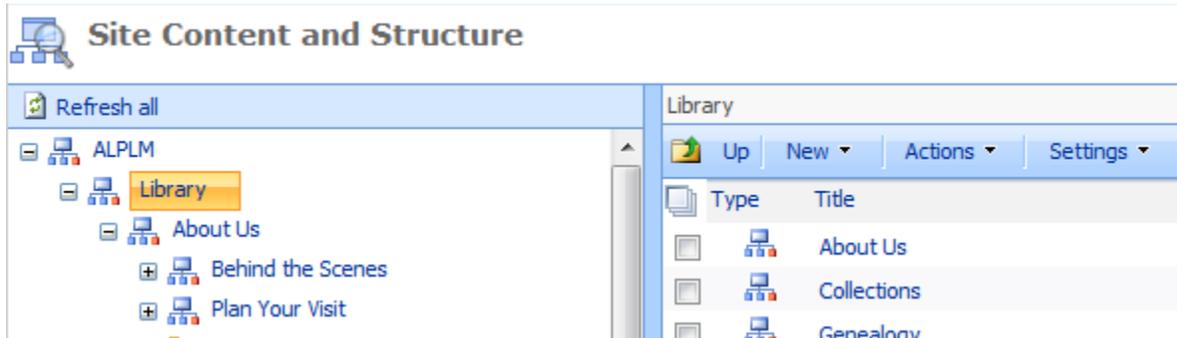


In the image above, the icon next to Events and Search indicates a site, and the icon next to Documents and Pages indicates a library.

## Creating Subsites

As was described earlier, creating subsites is a good way to organize your content and to separate out your permissions. Subsites 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 subsite of Library.



Creating a sub-site in SharePoint 2013 is a little different than previous versions of SharePoint. Here are the steps:

1. Make sure you are on a page within the site you want to make a subsite under.
2. Click **Settings**  in the top right, then select **Site contents**
3. Scroll down to the bottom of the page and click **new subsite**

### Subsites

 new subsite

 Events

 Search

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.
- **User Permissions** – Leave this as Use same permissions as parent site, unless you have a need to have different content editors for this subsite. This is explained in the next section.
- **Navigation inheritance** – Change this to Yes.

## 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 subsite 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 to.

### 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.

### More information regarding permissions

If you would like additional information about how configuring permissions within SharePoint 2013, please visit the [Understanding permission levels in SharePoint](#) page.

## 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, and show our recommended navigation configuration.

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 can be edited as follows:

1. Make sure you are on a page within the site you want to edit Navigation on. In most sites the Global Navigation is only configured from the root site.
2. Click **Settings**  in the top right, then select **Site settings**
3. Click **Navigation** under Look and Feel.

Users and Permissions

- People and groups
- Site permissions
- Access requests and invitations
- Site collection administrators
- Site app permissions

Web Designer Galleries

- Site columns
- Site content types
- Web parts

Look and Feel

- Design Manager
- Master page
- Title, description, and logo
- Page layouts and site templates
- Welcome Page
- Device Channels
- Tree view
- Change the look
- Import Design Package
- Navigation
- Image Renditions

From here you can decide whether pages and subsites automatically show up in Navigation, or if you will manually control them. You can also control the order or visibility of navigation items. We recommend that you select “Structural Navigation” for both the Global and Current Navigation options at the root. This will allow you to manually configure your navigation for your site. When you are on a subsite, we recommend that you set Global Navigation to “Display the same navigation items as the parent site.

When configuring your Structural Navigation, you can use Headings to separate out groups of links if you like. Many sites will just use a single heading with the same name as the subsite it is representing.

### 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

### More information regarding versioning

If you would like additional information about how versioning works within SharePoint 2013, please visit the [How does versioning work in a list or library](#) page on Microsoft Support.

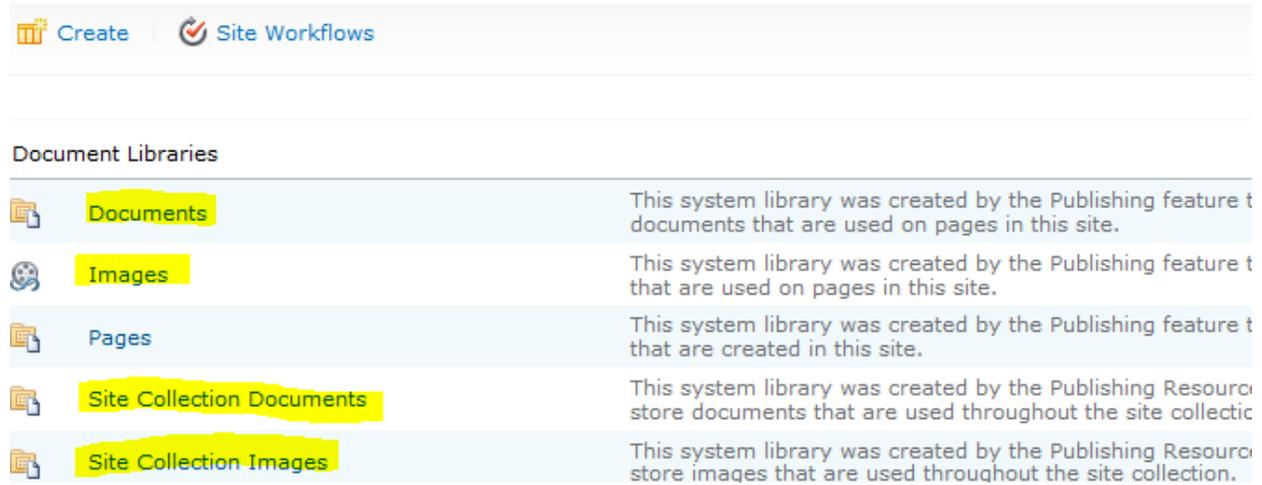
### Understanding check-in/check-out

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 subsite has its own libraries to store documents and images in. You must first go to the subsite that will be using the items, then click **Settings**  – **Site contents** 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 section titled 'Document Libraries' containing a table of system libraries.

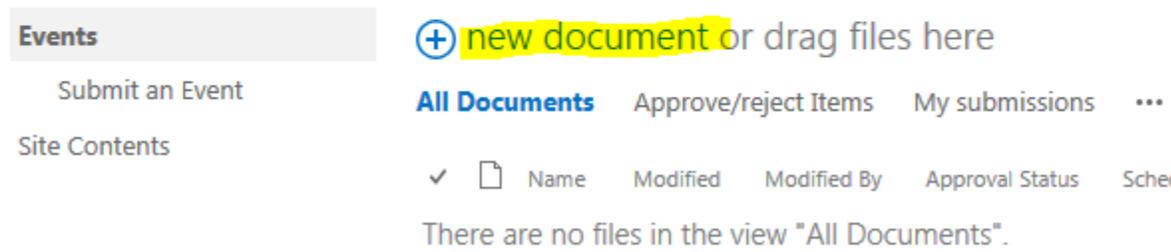
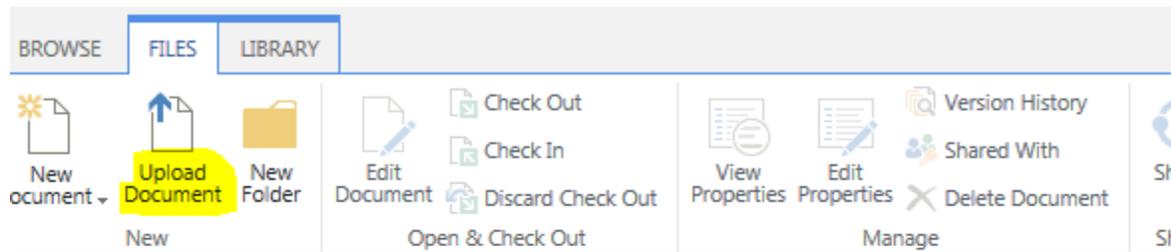
| Library Name              | Description  |
|---------------------------|--|
| Documents                 | This system library was created by the Publishing feature to store documents that are used on pages in this site.                  |
| Images                    | This system library was created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

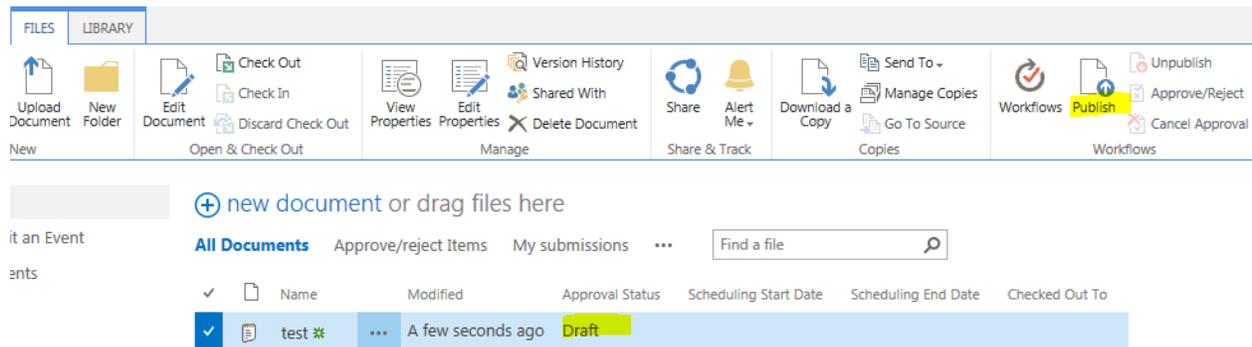
### Step 1 – Upload the document and check it in

From the library, ensure the “Files” tab is selected then click on Upload Document or “new document” 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. Alternatively, you can drag and drop files onto the page.



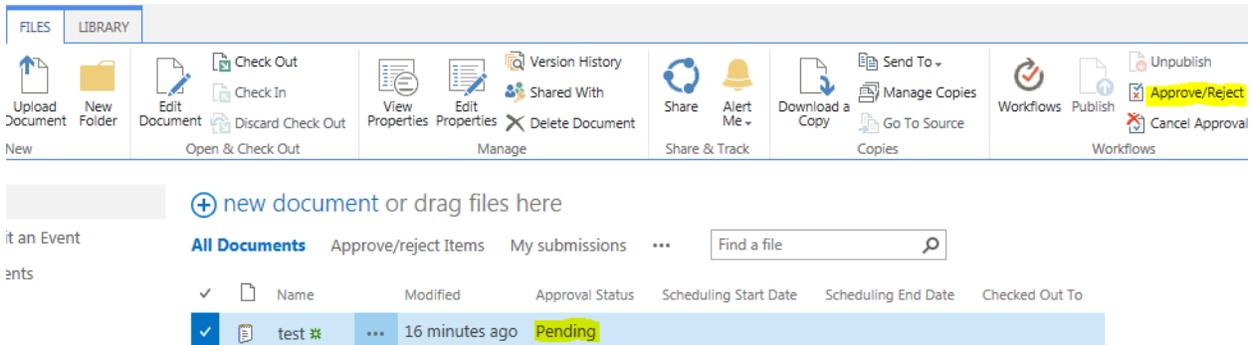
### Step 2 – Publish a major version

After the document is uploaded and checked in, it will be a draft version. Click on the document to select it, then click **Publish** in the Ribbon. 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

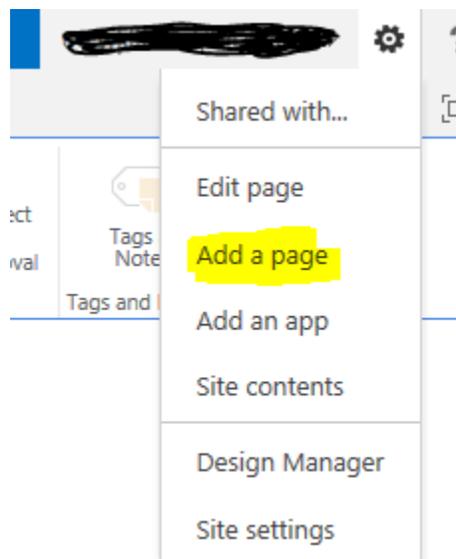
Now that the document is pending approval, you can approve it. Once again click on the document to select it. This time in the Ribbon you will see a choice to “Approve/Reject”, select it. You will be presented with options to Approve, Reject, or to leave the document Pending. Select Approved and click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



## Creating new pages

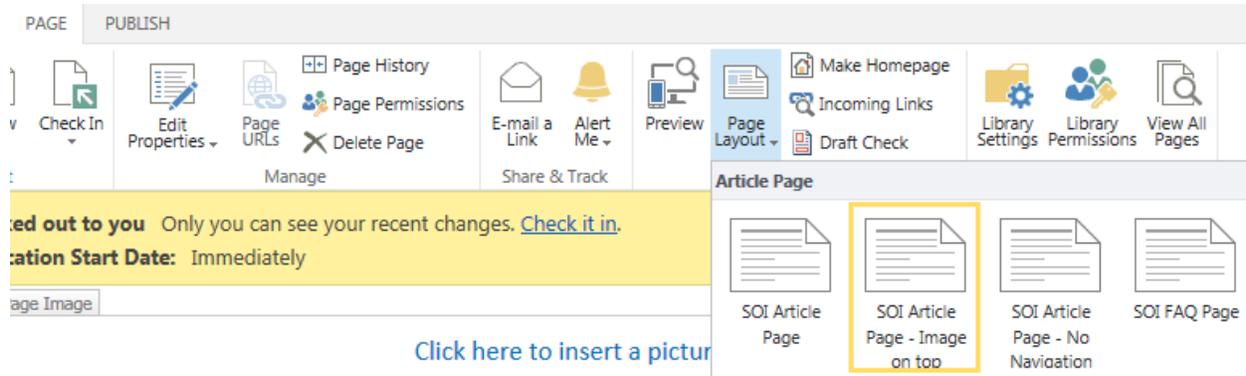
We work with pages differently than we do documents or images. Like documents or images, pages are stored in a Pages library located within the site that it is associated to. But unlike documents or images, we do not upload pages, or even do common page management from the Page library. Instead we create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

To create a new page, click **Settings**  and then **Add a page**.



After selecting **Add a 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.

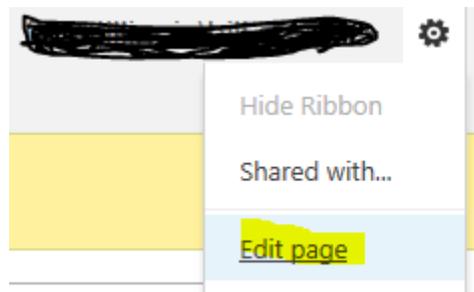


- **Page Layout** – Determines the layout of the page and whether you can add web parts or not. The common layouts are;
  - **SOI Article Page:** This will be used 95% of the time. It has a few web part zones, and is used primarily for static content. It will display the current navigation in the side bar.
  - **SOI Article - No Navigation:** Same as the Article Page, but will not display the column for Current Navigation.
  - **SOI Article Page – Image on Top:** Same as the Article Page, but in addition it provides a place for the Page image to exist on top. Primarily used for major landing pages within the site.
  - **SOI FAQ Page:** Use this page to create a Frequently Asked Question page. Index will be created for you.
  - **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 **Settings**  Menu.

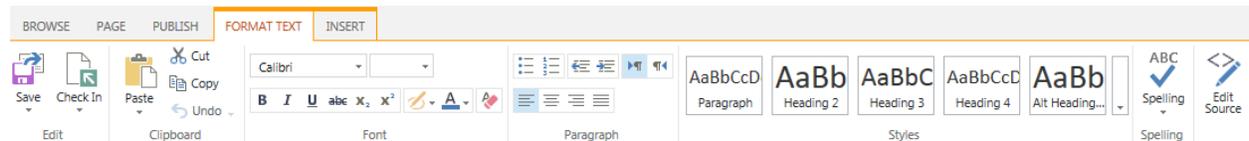


When you do this, the page will be checked out to you and you can make changes. Only one person can have a page checked out at a time, so while you have it checked out no one else can edit it.

## Ribbon Bar

SharePoint 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.

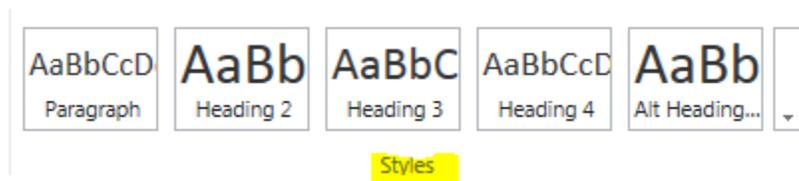
The default font type and size for your site has been determined by your agency during the design phase and should be the same for all pages. The most common reason to change font size on a page, is to help break your page into sections. In order to do that you need to use Headings described below.



## 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 Styles options 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.

### Web Parts

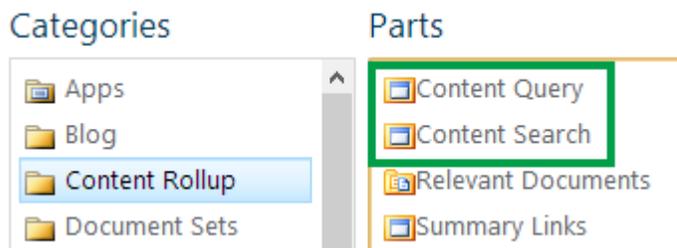
Within SharePoint Web Parts are used to primarily provide dynamic data to a page. As an example the Content Query Web Part allows us to provide a Rollup of all the Events Pages within a site to the main landing page. Web Parts should only be added to Web Part zones on a page, and not within the content area, otherwise you will get undesirable affects.

Web Parts for the site are typically determined and configured when the site is first setup, but occasionally new functionality is needed.

We will explain below some of the most common Web Parts that are using on a Public Facing site.

### Content Query Web Part / Content Search Web Part

There are two Web Parts that can be used to search data on a SharePoint site. They are very similar: the Content Query Web Part (CQWP) and the Content Search Web Part (CSWP). Just by looking at their names, it's not clear to distinguish the difference between the two.



You should use these Web Parts to rollup data from within your site to common landing pages, as provided earlier in my example of Events.

Please reference this article for more information regarding these web parts, and how to configure them: [When to use the Content Query Web Part or the Content Search Web Part in SharePoint](#)

### SOI Feedback Form

The SOI Feedback Form is used to gather information from an anonymous user and store that information within any of our SharePoint farms as List data. The data can then be used as needed from the business unit. A common use of the Feedback Form is a Contact Us form.