How to Update and Maintain a SharePoint Site

Updated: 12 Jul 2012

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NOTE: There are **three main folders** associated with your site: **Pages, Images, and Documents**.

- You may create sub folder in the Images and Documents folders
- SharePoint **does not support** sub folders in the Pages folder

Site Owner/Editor Tasks

Site Editors

Site editors can create, edit, change, delete and publish pages, images and documents within this site

Site Owners

Site owners have the same privileges as editors - they can also add editors and owners. They have full control of the site.

Adding Editors and Owners

1. Click the "**Sign in**" link at the bottom of the page (if you have not already done so).
2. Click **Site Actions** at the top of the screen.
3. Click **Site Settings | People** and Groups
4. Select the group you want to add someone to from the list of groups on the left
5. Click **New**. The add users dialog box will display
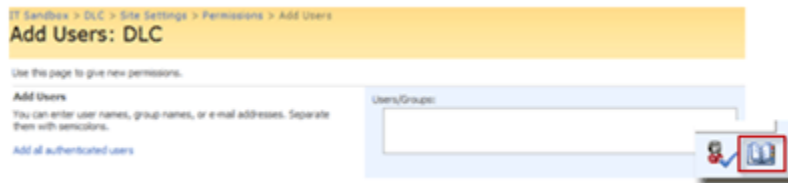
6. Click the **find names icon**.
7. Enter the person's name in this format, Last, First.
8. Select the *name* from the list displayed.
9. Repeat to add another, click **OK to finish**.
10. Leave the default settings in the **Give Permissions** section
11. Leave the default or uncheck "Send welcome e-mail to the new users" checkbox depending on how you want to notify the new users.
12. Click **OK**.

Navigation

Most sub sites in a site collection will use the top navigation menu from the parent. In the case of IT site collections HPIT/WW and HPIT/Sites (note: the top navigation menu for these collections is the same).

Each sub site can have its own left navigation menu. You can add headings (linkable or not) and links. Images cannot be added to the left or top navigation menus.

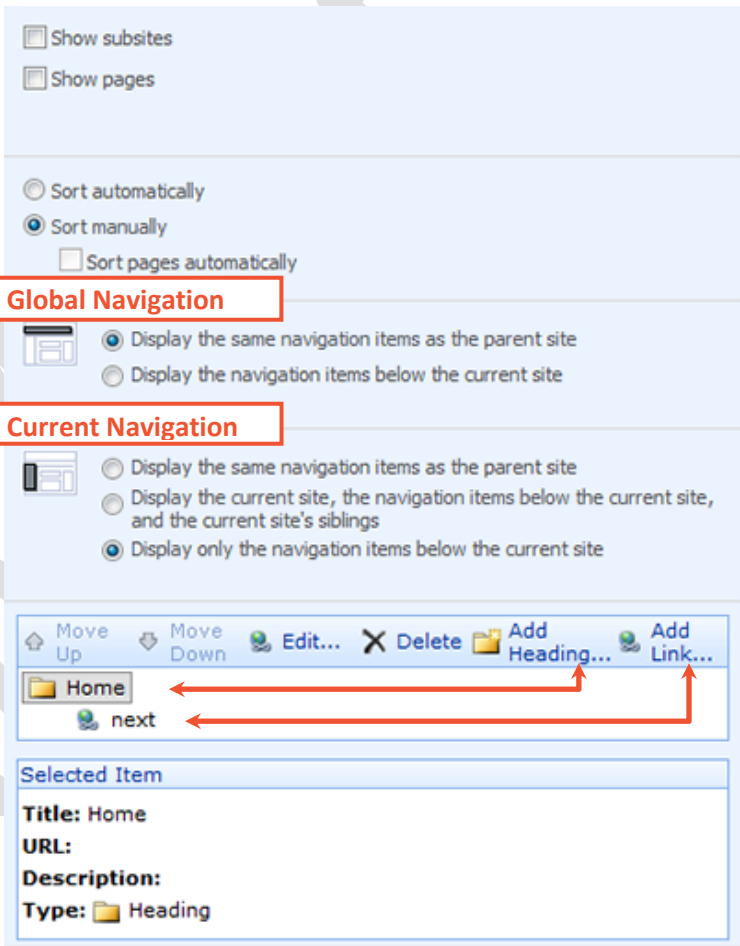## Understanding Global and Current Navigation Settings

Global Navigation is the horizontal navigation menu that appears across the top of the web site. It is usually the same for all sites in the collection.	
Current Navigation is the left-hand navigation menu. It can be unique for all sites.	
Add Heading allows you to add clickable (or not) section headings to your navigation menu. Headings can be repositioned by clicking on them to select and them using the Move Up and Move Down buttons.	
Add Link allows you to add link to the navigation menu. Links can be placed under a heading or used without headings. Links under headings will be indented.	
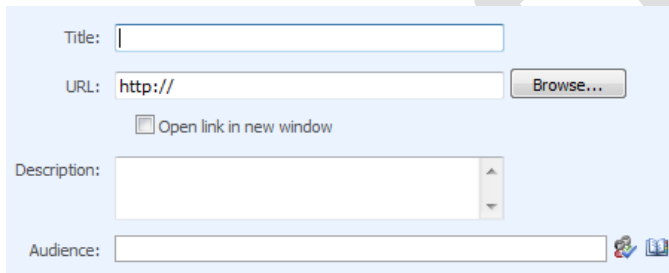
Modifying the Navigation Menu

Add a Menu Item

1. Click **Site Actions | Site Settings | Modify Navigation**.
2. Click **Add Heading** or **Add Link** to add an item to the menu.
3. **Browse** to a link within the site collection or **paste** a link to a site outside the collection or external to HP.
4. Click **OK**.

Edit a Menu Item

1. Click **Site Actions | Site Settings | Modify Navigation**.
2. Click on **a Heading or Link** to select.
3. Click **Edit** to change the text or link or click **Delete** to remove the item from the list.
4. **Browse** to a link within the site collection or **paste** a link to a site outside the collection or external to HP.
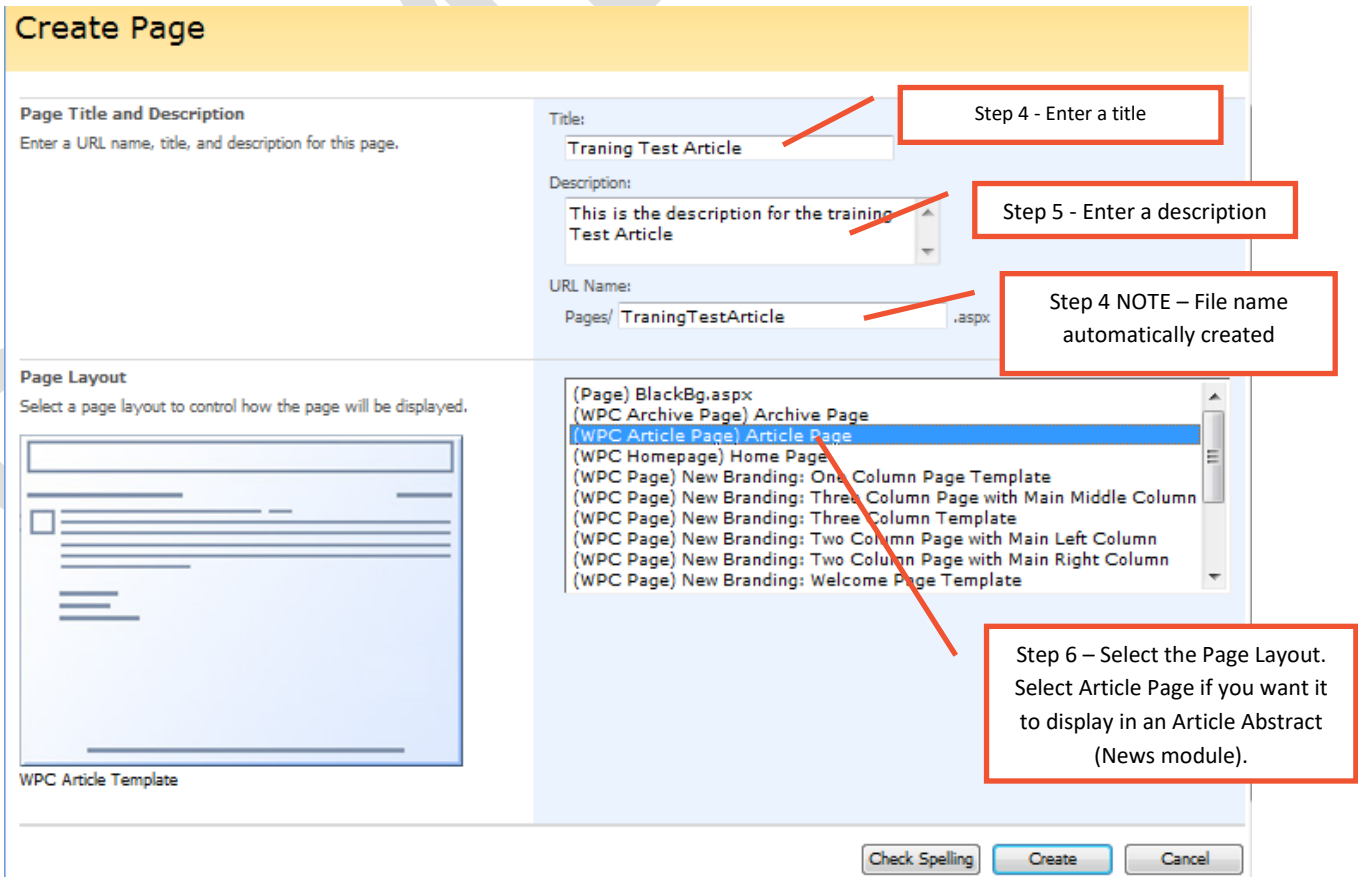
5. Click **OK**.

Move a Menu Item

1. Click **Site Actions | Site Settings | Modify Navigation**.
2. Click on **a Heading or Link** to select.
3. Click the **Move Up** or **Move Down** button to reposition the menu item.
    NOTE: As a link item moves up or down it will change indent position. Continue up or down until the link item is in the proper position in the list.

4. Click **OK**.

Pages - Creating and Editing

Creating New Pages

1. Click the "**Sign in**" link at the bottom of the page (if you have not already done so).
2. Click **Site Actions** at the top of the screen.
3. Click **Create Page.**
4. Enter a title in the Title field. NOTE - once you click out of this field, this title without spaces will be automatically populated as the file name. You may change the file name.
5. Enter a description - NOTE - this is what will display in search results in a Portal Search.
6. Select the appropriate layout template in the Page Layout section.
   - (WPC Archive Page) Archive Page
   - (WPC Article Page) Article Page
   - (WPC homepage) Home Page
   - (WPC Page) One Column Page
   - (WPC Page) Three Column Page
   - (WPC sitemap Page) Sitemap Page
   - (WPC Two Column Page) Two Column Page with 50%:50% layout
   - (WPC Two Column Page) Two Column Page with 66%:33% layout

7. Click the **Create** button.
8. The page will be saved and the browser will display the pages folder.
9. To edit this new page, follow the instructions in **Updating a New Page**.

Updating a New Page

After creating a page, the Pages folder will be displayed in the browser.
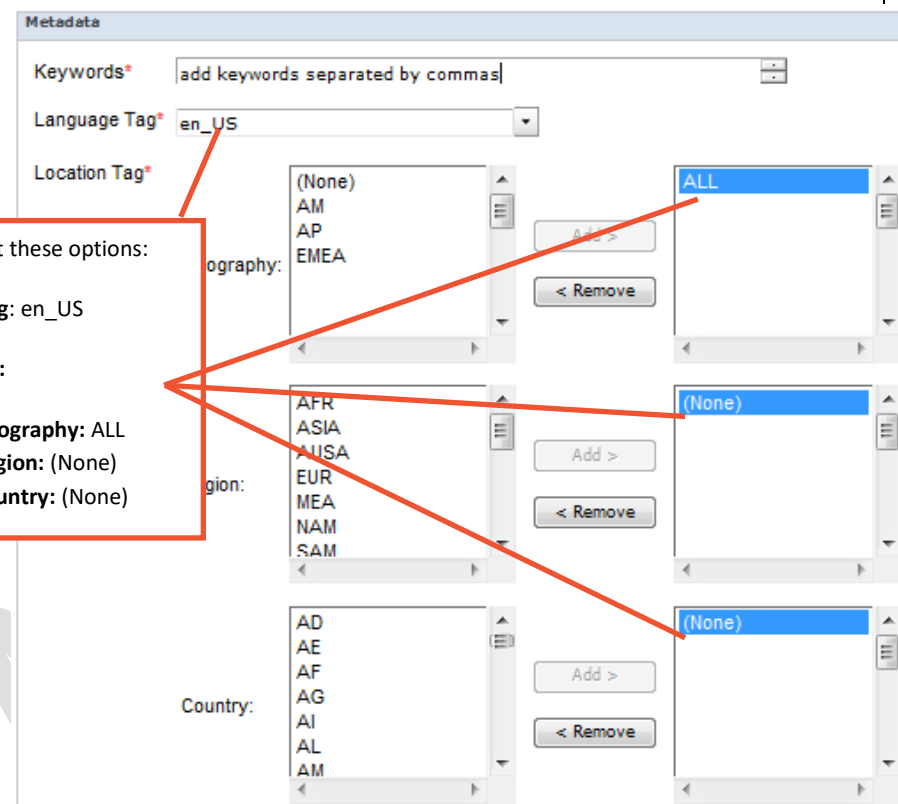
1. Locate the page you just created. (**TIP**: Sort the Modified Date column by Descending Date to display your new page at the top of the list.) **NOTE:** Your new page will be in Draft status AND checked out to you.

2. Click the file name to open the file for editing and begin with Step 6 in **Updating Existing Pages**.
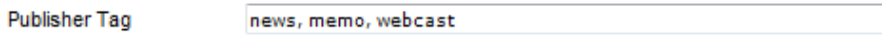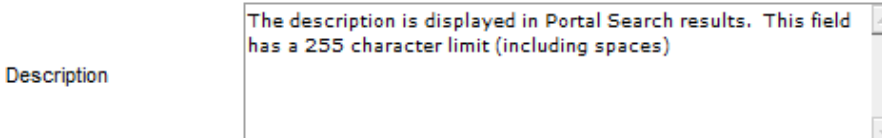
Required Content and Meta Data

Content or Meta Data	Where to add content
Title (Title must be unique and is displayed in search results) **Article Date** (Article Date is used in Query web parts)	

Content or Meta Data	Where to add content
Keywords **Language Tag** **Location Tag**	Metadata Keywords* — add keywords separated by commas Language Tag* — en_US Location Tag* Always select these options: **Language Tag**: en_US **Location Tag**: **Geography**: ALL **Region**: (None) **Country**: (None)
Feedback URL & **Support URL** (If blank and the Feedback and Support URLs are set in the Property Settings this info will be used in the Feedback and Support links at the bottom of every page in your site. If neither is completed, the links will not work.)	Feedback URL If the field is blank, the value will be retrieved from the site property. Support URL If the field is blank, the value will be retrieved from the site property. **TIP:** Setting to use here or in the Property Setting Mailto:Your.Email@hp.com?subject=Feedback for Site Name **Mailto:** is HTML code to generate an email to the fowllowing email address(es) **?subject=** is HTML code setting the subject that will automatically be filled in when the Outlook message is generated
Security label (Use Restricted unless your content is Confidential)	Security label* Restricted
Creator email Not required but a good practice to fill in)	Creator email lisa.urbani@hp.com

Content or Meta Data	Where to add content
Publisher Tag (Not required by WPC but if you want this page to be displayed in a query web part it is required. If using multiple tags, separate with commas and in the query web part specify contains rather than equals)	Publisher Tag news, memo, webcast
Description (Not required by WPC, but a best practice to complete. This content is displayed in the search results on a Portal search.)	Description The description is displayed in Portal Search results. This field has a 255 character limit (including spaces) Can be the same as the Article abstract on an Article page. Description displays in the search results, so it should be meaningful)

Updating Existing Pages

1. Click the "**Sign in**" link at the bottom of the page (if you have not already done so).
2. Click **Site Actions** at the top of the screen.
3. Click **Manage Content and Structure** at the bottom of the drop down menu.
4. Click on the **Pages** folder.
5. Click on the file for the page to be edited. This will open the page in your browser.
6. Click **Site Actions | Edit page.**

   Adding or updating content in the Introductory Text area

7. Add our update your content.
8. If done, go to step 12.

   Adding or updating content to an existing web part

9. Click **Edit** at the top of the web part
10. Select "**Modify Shared Web Part**" from the drop down menu.
11. Add or update your content.
12. Click the **Check in to Share Draft** button at the top of the screen when done.

Adding Web Parts

There are a variety of web parts you can add to your page. Some of the commonly used web parts are the Content Editor Web Part, Link List, Article Abstract

1. Click the Add a Web Part link in the area where you want to add a web part to display the list of available web parts.
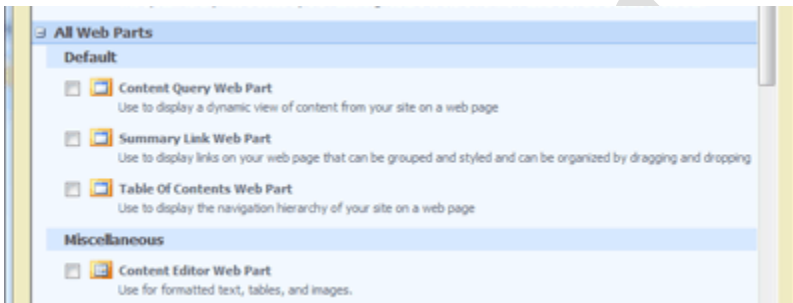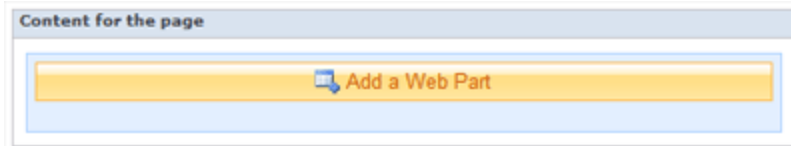
2. Click the check box to the left of a web part to select that web part.
3. Click the Add button at the bottom of the window.

Note: if you want to add HTML code you created in Dreamweaver, select the Content Editor Web Part under Miscellaneous.

Editing a New Web Part

Always change the title of a web part or change the chrome setting to none otherwise the name of the web part will display in the gray bar at the top of the web part on your web page.

1. Click **Edit** at the top of the web part
2. Select "**Modify Shared Web Part**" from the drop down menu.

3. Expand the **Appearance** heading to change the Title of the web part (the gray bar at the top of the web part).
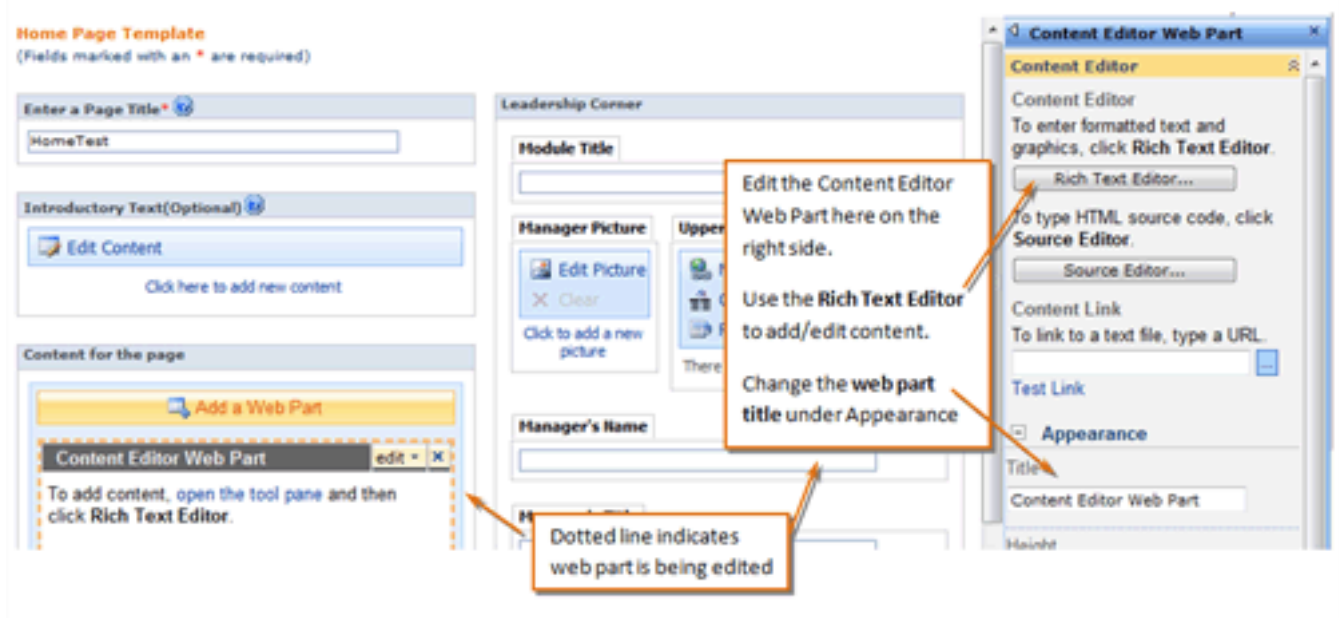
4. Click the **Rich Text Editor...** button when using the Content Editor Web Part to add or edit your content.
5. Click the **Check in to Share Draft** button at the top of the screen when done.

Adding HTML code created in Dreamweaver

1. Copy the HTML code in Dreamweaver.
2. Click the **Source Editor** button in WPC to display the HTML code in the CEWP.
3. Paste the code copied from Dreamweaver into the Source Editor. If you are replacing code, select all the code and then paste.

Adding a Link List Web Part
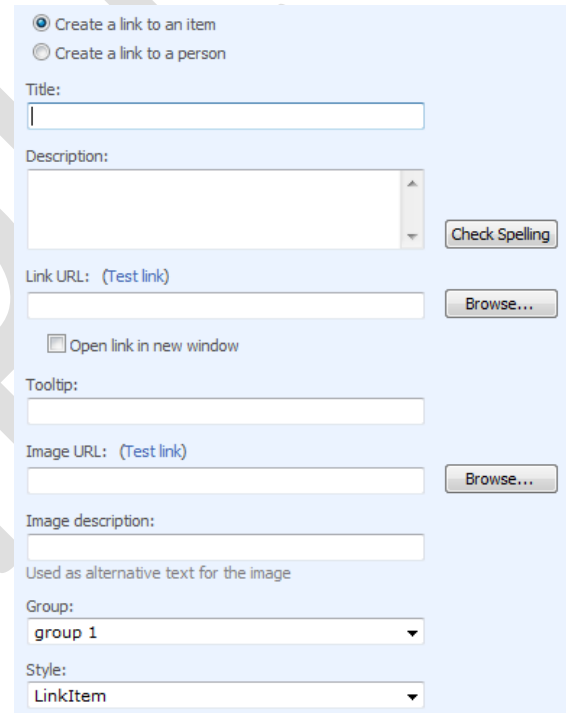
1. **Click** Add Web Part.

2. **Select** Link List **in the** Suggested Web Part for **section and click OK**.
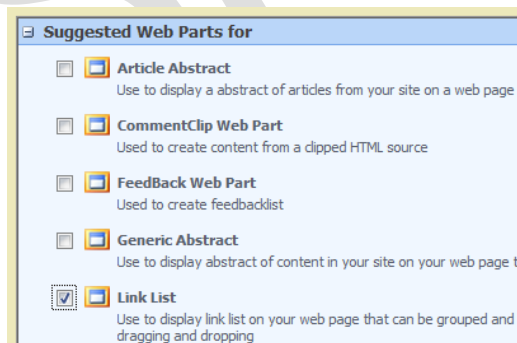
3. **Click** Edit | Modify Shared Web Part **after Link List has been added**.
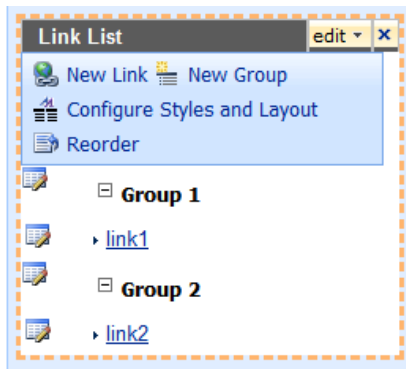
4. Determine the type of link list you want to add: simple list of links or collapsible groups of links. Note: You can setup groups after links are created. You would then modify the links to assign to a group.

5. OPTIONAL: Click **New Group** to create a group if you want the links to display in groups.

6. **Click New Link** to add a link

7. Select **Create a link to an item** (this is what you will use to create a kink to another page, document, or external link).

8. Enter the text for the link in the **Title** field.

9. Enter the URL for the link **URL field** (you can browse the Pages or Documents folder of your site or any other site in the site collection or past a link from an external site.)

10. OPTIONAL: Select a group from Group drop down menu.

11. Select the link **Style**. *NOTE:* If you entered data in the Description and/or Image fields you will need to select Full Abstract for these items to display. Otherwise select LinkItem or AbstractItem.

Examples of Link List Styles

LinkItem style adds a link is regular style font preceeded by an arrow bullet

AbstractItem style add a link in bold style font

FullAbstract style adds the link title in bold, abstract, a Read More link and an image. Linking to an image is not required.

Title and Description style adds the link to the title with the description below.
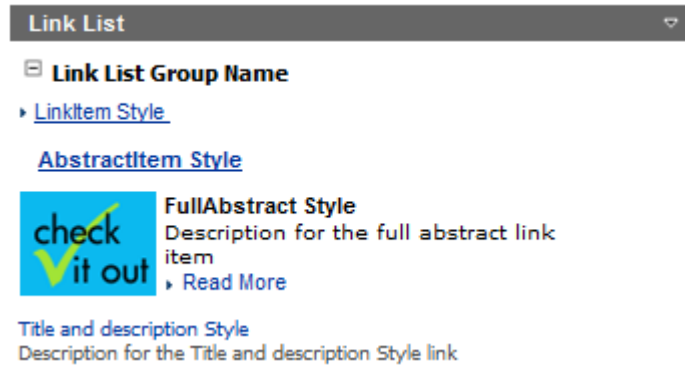
Notes:

- Font size cannot be adjusted on Link Lists
- Full Abstract and Title and Description style links will not collapse

Images – Uploading and Adding to a Page

Uploading Images to the Images folder

Best Practices:

Before you add images to your site's images folder, check the **Site Collection Images folder** - there are many images available and easily accessible from any site in the site collection. This saves disk space as we only need one copy of images that are frequently used by many web pages.

When **naming images or documents** for use on web sites, **do not include spaces** in the file name .

UseNoSpaces or Use_Underscores_for_spaces.

When **updating documents or images - always use the same file name,** this way you will not need to recreate the link to the document from the page(s) that link to it.

When **uploading revised documents or images** you will need to **check out the existing** document or image first.

1. Click the "**Sign in**" link at the bottom of the page (if you have not already done so).
2. Click **Site Actions** at the top of the screen.
3. Click **Manage Content and Structure.**
4. Click the **Images** folder link in the right pane.
5. Click **New | Item**.
6. Click **Upload Multiple Items** (you can use this option even if you are loading one or many images).
7. Navigate to and select the image(s) you want to upload.
8. Click the **OK** then click **Yes**.

   NOTE: Once the items are uploaded, you will need to **publish** them so that the **Approval Status is 'Approved'** to ensure everyone accessing the site can see them. If the **Approval Status** of an image is **Pending or Draft,** it **will not be accessible** to site visitors.

9. Click the **checkbox** to the left of the item(s) you added.
10. Click **Actions | Publish**.
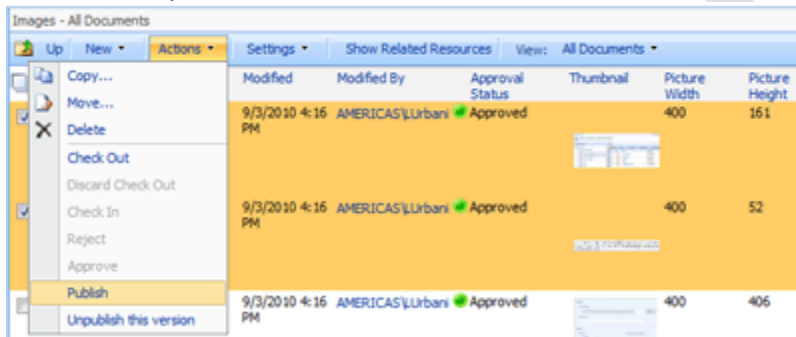
11. Click the **OK** button at the bottom of the Check In - Webpage Dialog box.

    Now you can add this image to a web page.
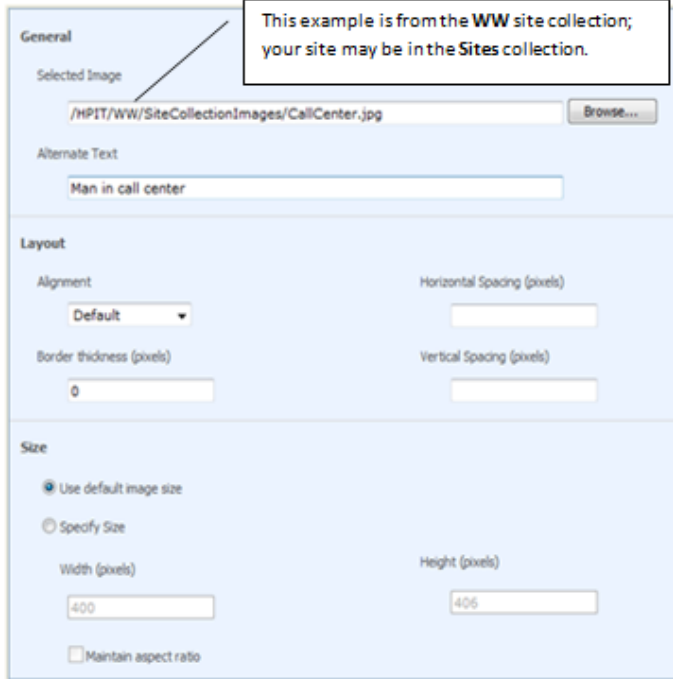
Adding Images to a Page

There is more information about images, where to find images and standard image sizes for image containers in the **Tips and Hints - Images** section below.

1. Navigate to the page you want to add the image to.
2. Click the "**Sign in**" link at the bottom of the page (if you have not already done so).
3. Click **Site Actions** at the top of the screen.
4. Click **Edit page.**
5. Place your cursor where you want the image.
6. Click the **image icon** on the editing ribbon at the top of the edit window. (if the page is long and you are working at the bottom, you can move this ribbon to the area where you are working).
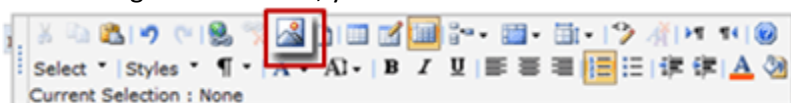
7. Click the **Browse** button and navigate to the image you want to add to the page.

> General
>
> This example is from the **WW** site collection; your site may be in the **Sites** collection.
>
> Selected Image
>
> /HPIT/WW/SiteCollectionImages/CallCenter.jpg   Browse...
>
> Alternate Text
>
> Man in call center
>
> Layout
>
> Alignment   Horizontal Spacing (pixels)
>
> Default ▼
>
> Border thickness (pixels)   Vertical Spacing (pixels)
>
> 0
>
> Size
>
> ◉ Use default image size
>
> ○ Specify Size
>
> Width (pixels)   Height (pixels)
>
> 400   406
>
> ☐ Maintain aspect ratio

8. Add a *brief description* of the image in the **Alt Text** field.
9. Set the image **Alignment** in the **Layout section** of the image settings dialog box.
10. Leave the *defaults* in the **Size section**.
11. Click **OK**.
12. Click **Check in to Share Draft**.

Documents - Uploading and Linking

Uploading documents to the Documents folder

Best Practices:

When **naming images or documents** for use on web sites, **do not include spaces** in the file name.

UseNoSpaces or Use_Underscores_for_spaces.

When **updating documents or images - always use the same file name** - this way you will not need to recreate the link to the document from the

1. Click the "**Sign in**" link at the bottom of the page (if you have not already done so).
2. Click **Site Actions** at the top of the screen.
3. Click **Manage Content and Structure.**
4. Click the **Documents** folder link in the right pane.
5. Click **New | Item**.

6. Click **Upload Multiple Items** (you can use this option even if you are loading one or many images).
7. Navigate to and select the document(s) you want to upload.
8. Click the **OK** then click **Yes**. Once the items are uploaded, you will need to publish them to ensure the others reviewing the site can see them.
9. Highlight the document you just added and click the dropdown arrow on the right.
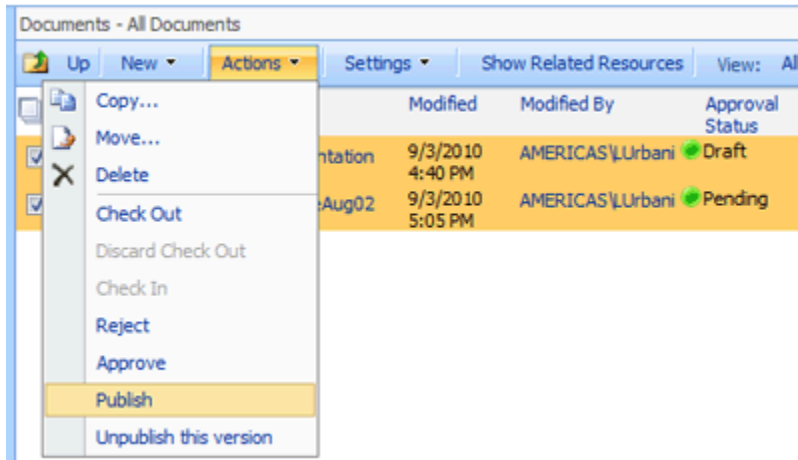
10. Click **Publish**.
11. Click the **OK** button at the bottom of the Check In - Webpage Dialog box.

    Now you can add links to this document from a web page.

Linking to documents stored in the Documents folder

1. Navigate to the page you want to add the image to.
2. Click the "**Sign in**" link at the bottom of the page (if you have not already done so).
3. Click **Site Actions** at the top of the screen.
4. Click **Edit page.**
5. Highlight the text that you want to link to a document.
6. Click the **link icon** on the editing ribbon at the top of the edit window. (if your page is long and your are working at the bottom, you can move this ribbon to the area where you are working).
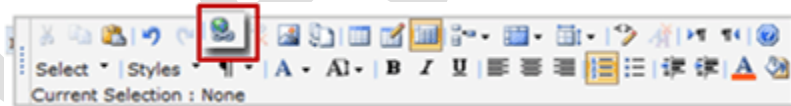
7. Click the **Browse** button and navigate to the document you want to link to.
8. Click **OK**.
9. Click **Check in to Share Draft**

Tips and Hints

Commonly Used Web Parts

Content Editor Web Part (CEWP)	This is a very versatile web part. You can use this web part to add lists of links, sentences/paragraphs, and images, tables for content or layout.
Article Abstract (a Query Web Part)	This is the web part used to create the News module. It will display content based on the criteria and appearance settings you set for the web part.
Link List	This web part is used to add a list of links. Link lists can be simple list of links or you can include descriptions and images.

Web Part Parts

Title

The content that displays in the gray bar (chrome) of the web part. When adding Web Parts, be sure to change the default title or set the chrome to none.

Edit the content that displays in the Chrome (gray bar) of the web part.

1. Click **Edit** in the upper right corner of the web part.
2. Click **Modify shared web part.**
3. Expand **Appearance.**
4. Enter a title or heading in the **Title** field.

Chrome

The gray bar at the top of all web parts.

You can turn off the gray bar (chrome) if you do not want it to display.
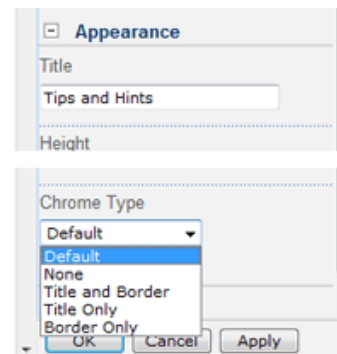
1. Click **Edit** in the upper right corner of the web part.
2. Click **Modify shared web part.**
3. Expand **Appearance.**
4. Click the down arrow under **Chrome Type.**
5. Select **None.**

Images

Images Folders

There are two main images folders available to you

- The images folder within your site.
- The Site Collection Images folder.

Where to find images

- There is a wide variety of images stored in the Site Collection Images folder of the HPIT/**WW** site collection and the HPIT/**Sites** site collection. The Site Collection Images folder is easily accessible (1) from any site's Select an Image – Webpage Dialog.
- You may use any image stored in the Site Collection Images folder.
- All IT management images (L2, L3, L4, Global Function Partners) should be stored in the Site Collection Images ITMgmt folder.
- Other images, specific to your site, can be stored in the Images folder for your site.
- You can link to images in any other site in the collection by navigating to another site's images folder. Use the Up button (2) to navigate up the collection

Selecting the Site Collection Images folder

1. Click the **image icon** on the editing ribbon at the top of the edit window. (if your page is long and you are working at the bottom, you can move this ribbon to the area where you are working).
2. Click the **Site Collection Images icon** (1) in the Look In column of the **Select an Image -- Webpage Dialog** window.
3. Select an image from the default Site Collection Images folder or one of the other folders.
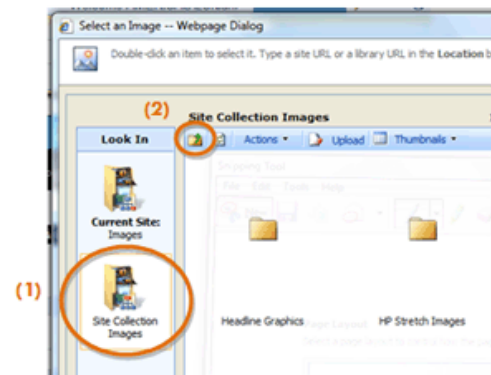
Finding an Image in the Images Folder

1. Click the Thumbnail dropdown and select All Documents.
2. From this view you can see the image size to the right of the thumbnail and you can sort images by:
   - name
   - date modified
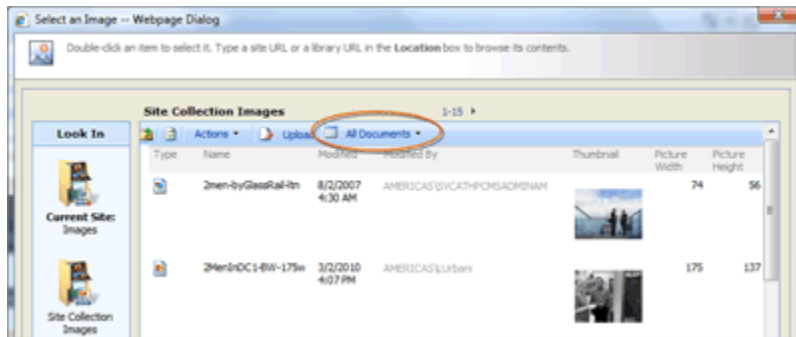
Finding Head Shot Images for IT Manager and Other IT People

All IT Management images (L2, L3, L4, Global Function Partners) should be stored in the Site Collection Images ITMgmt folder.

When creating images to use in the Leadership Corner of the Home Page template, use the standard portrait size of 60x83.

Manager images used on biography pages may be any size.

Home Page Leadership Corner Manager Picture container

Portrait only = 60x83

1. Click **Edit Picture**.
2. Click **Browse**.
3. Click the **Site Collection Images** folder icon on the left under **Look In**.
4. Open the **ITMgmt folder**.
5. Locate the *image of your executive*.
6. Click **OK**.

Thumbnail Image Sizes

Other images, specific to your site, can be stored in the Images folder for that site.

You can link to images in any other site in the collection by navigating to another site's images folder. Use the Up button (2) (see image in the **Selecting the Site Collection Images folder** section) to navigate up the collection.

Image Sizes for Specific Image Containers

The image containers on the Home Page template and the Article template and in Link Lists have a preset size. If the image used in the image container is a different size that the size of the container, the image will appear distorted when displayed on the page.

The sizes for these containers are shown in the format width x height.

Home Page Template – Leadership Corner image container is portrait only.

Portrait: 60x83

**Article page** image container image can be landscape or portrait.

Landscape: 74x56
Portrait: 56x74

 (**Note:** the image does not display on the article page when viewed in the browser – it displays in the Article Abstract or Query Web Part when Full Abstract is selected.)

Article Page 'Select Image' Container

1. Click **Edit Picture**.
2. Click **Browse**.
3. Click either the **Current Site Images** or the **Site Collection Images** folder icon on the left under **Look In**.
4. Locate the image.
5. Click **OK**.
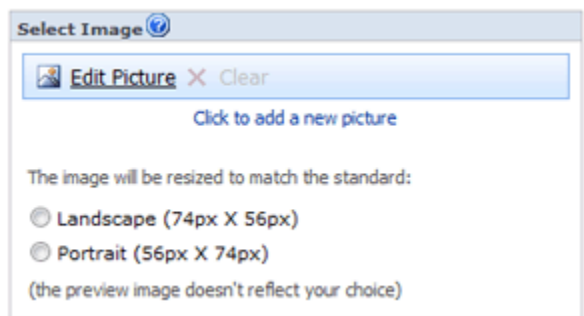
Link List Browse for Image

Landscape = 74x56 |
Portrait = 56x74

1. Click **Browse**.
2. Click either the **Current Site Images** or the **Site Collection Images** folder icon on the left under **Look In**.
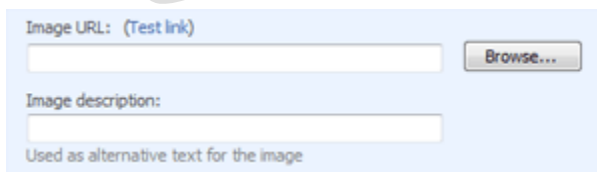3. Locate the image.
4. Click **OK**.

Creating Images - using the Snipping Tool available in Accessories

There is more information about images, where to find images and standard image sizes for image containers in the **Tips and Hints - Images** section below.

There are several ways to create images and this is an easy way if you do not have Adobe Photoshop or Paint.NET.

If you want to create an images from a PPT, web page, spreadsheet, Word doc…

1. Open your source file.
2. Click the **Windows Start button**.
3. Click **All Programs | Accessories | Snipping Tool**.
4. Place the **crosshairs** (+) where you want your image to start and click and drag to highlight what you want to be included in your image.
5. Release your mouse and a dialog box with the image will display.
6. Save the image to a folder or your desktop.
7. Follow the instructions below for **Uploading Images to the Images folder**.

Resizing images – using Microsoft Paint

There are several ways to resize or format images. This is an easy way if you do not have Adobe Photoshop or Paint.NET.

TIP: This works best for photos rather than images with text. If you need to resize text-heavy images, you will need to use Adobe Photoshop or Paint.NET.

TIP: Standard image sizes for thumbnails on Article templates are 74x56 or 56x74.
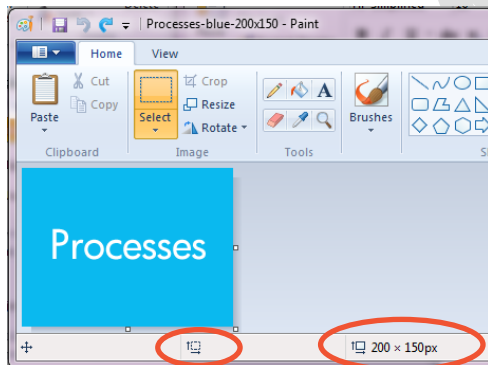
Resize a Snipped Image

To **resize the image you snipped** above:

1. Click the **Windows Start button.**
2. Click **All Programs | Accessories | Paint**.
3. Click **the Paste** button on the Home tab to paste the image you snipped into the work area.
4. Click **Resize** on the Home tab.
5. Ensure that Maintain aspect ratio is checked in the Resize section of the Resize and Skew dialog box.
6. Set the **Resize By** settings to either **Percentage or Pixels**.

7. Change the **Horizontal** or **Vertical** setting to the dimension you need. (Since maintain aspect ratio is set, changing one will change the other.)
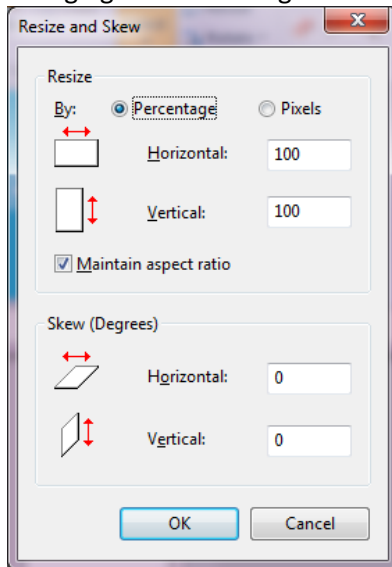
8. Click **OK**.
9. If you need to Crop the image, you can grab one of the handles and move in to crop. You can view the horizontal and vertical dimensions in the lower portion of the screen.
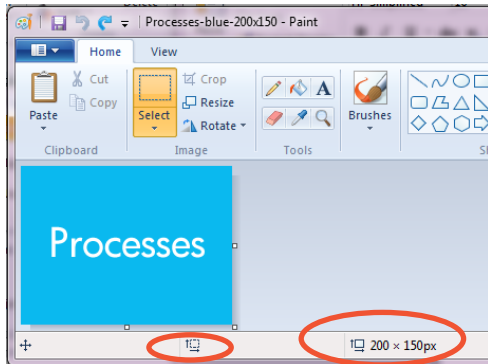

10. Click **File | Save As** and save the image to your local hard drive.
11. Follow the instructions below for **Uploading Images to the Images folder**.

Resize an Existing Photo or Image

To **resize a photo or image you already have** on your local or network drive, follow the steps below:

1. Click the **Windows Start button.**
2. Click **All Programs | Accessories | Paint**.
3. Navigate to the folder location of the photo or image to be resized.
4. **Double click** to open the image file.
5. Click **Resize** on the Home tab.
6. Ensure that Maintain aspect ratio is checked in the Resize section of the Resize and Skew dialog box.
7. Change the **Horizontal** or **Vertical** setting to the dimension you need. (Since maintain aspect ratio is set, changing one will change the other.)
8. Click **OK**.

9. If you need to Crop the image, you can grab one of the handles and move in to crop. You can view the horizontal and vertical dimensions in the lower portion of the screen.

10. Click **File | Save As** and save the image with *a new name*.
11. Follow the instructions above for **Uploading Images to the Images folder**.

How to capture a screen shot

The entire screen - You can capture then entire screen buy pressing the Alt +Print Screen buttons on your keyboard.

The dialog box or popup window only - You can capture the window only by pressing the Print Screen button on your keyboard.

You can then paste the captured image into Paint, Photoshop or Paint.NET.