Microsoft SharePoint 2010

8 – Creating and editing pages

CORPORATE LEARNING & DEVELOPMENT

CREATING AND EDITING PAGES

INFOCUS

All new SharePoint sites have only one page that you can edit – the home page. And this page needs to be edited to make it appropriate and relevant for your business needs.

As well as editing the home page, you can also create as many new pages in your site as desired, adding content and links to them.

In this booklet, we're assuming that you have the default *Contribute* permission levels which allow you to both edit the home page and create new wiki pages. This default permission level doesn't allow you to create other types of pages.

In this booklet you will be shown how to:

- ✓ place a page in edit mode
- ✓ insert and format text
- ✓ insert tables
- ✓ insert pictures
- ✓ insert hyperlinks
- ✓ insert list and library web parts
- ✓ create new wiki pages
- ✓ link to an existing wiki page
- ✓ link to a new wiki page
- ✓ delete a wiki page

PLACING A PAGE IN EDIT MODE

The individual web pages in a SharePoint site comprise various components, such as the welcome text, Shared Documents web part, stock image and the Getting Started links on a default team site's home page.

If you have the correct permissions, you can edit some of these components. But before you can do this, you must first display the page and place it in edit mode.

Example:

1 We displayed the Home page, then clicked on **[Site Actions]** in the ribbon and selected **Edit Page**

Two blue boxes will appear on the page to show both the editable areas and its current text layout, and two Editing Tools tabs will display…

2 Then we clicked on the **Insert** tab

This tab has the tools for inserting content into a page…

3 Then clicked on the **Format Text** tab

This tab contains the tools for formatting text, applying styles and saving your changes.

To switch to normal mode without saving any changes…

4 We clicked on the arrow below **Save & Close** and selected **Stop Editing**
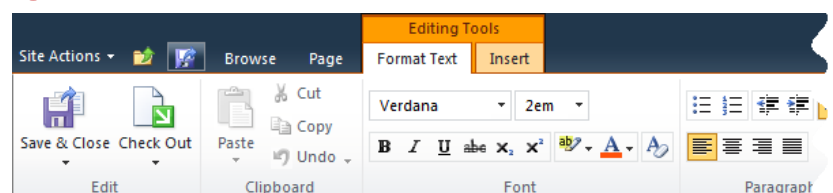
The page will switch back to normal mode
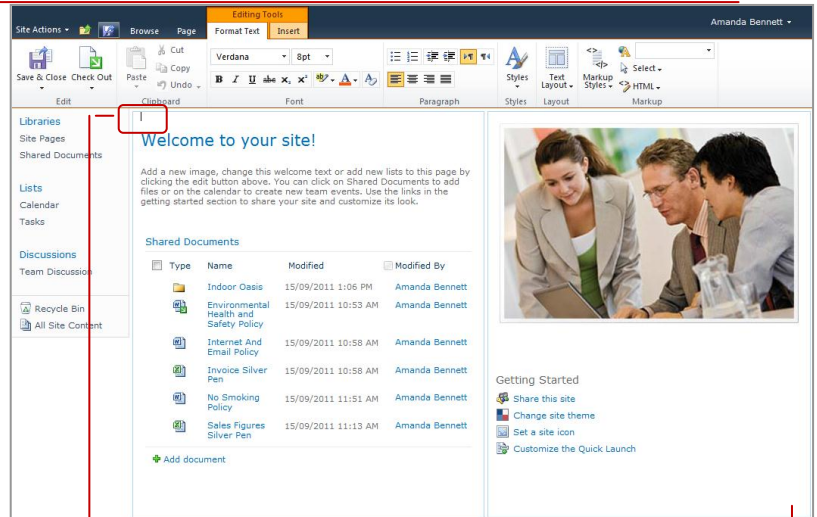
1

Notice that the cursor appears at the top of the page in edit mode. Notice also that the Quick Access bar is not editable in edit mode, only the content surrounded by the blue boxes.

2

3
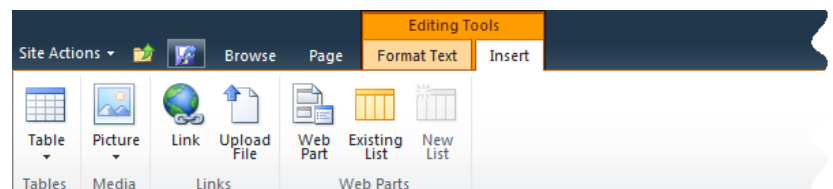
For Your Reference…

To **place** a **page** in **edit mode**:
1. Display the page
2. Click on **[Site Actions]** and select **Edit Page**

To **close** a **page without saving** the **changes**:
1. Click on the arrow below **Save & Close** in the **Edit** group on the **Format Text** tab and select **Stop Editing**

Handy to Know…

- You can also place a page in edit mode by clicking on **Edit**, which is located to the left of the **Browse** tab in the ribbon.

INSERTING AND FORMATTING TEXT

You can insert text into a page by clicking in the desired location and typing as if you were using Word. The text will be formatted using the default settings. You can change this formatting by selecting the text and using the formatting tools or one of the style options to quickly apply a style. Note that you cannot edit text in a web part like the **Shared Documents** web part on our home page.

Example:

1 We placed the Home page in edit mode

To edit some text…

2 We clicked to the left of **your** in the heading, then dragged to select the text **your site!**

3 Next we typed **the Finance Team**

To format some text now…

4 We clicked in the grey paragraph beneath the heading, then clicked on **Select** in the **Markup** group and selected **Paragraph**

This will select all text in the paragraph…

5 Then we clicked on **Markup Styles** to see a list of default HTML styles that have been defined for pages in this site

6 We clicked away from the menu to close it, then clicked on **Styles** to see a list of other quick styles that you can apply, then closed this menu

You can also use the more typical formatting tools…

7 Finally we clicked on **8pt** in **Font Size**, typed **9pt**, pressed `Enter` to increase the font size by 1pt, then clicked away from the text to see the result

8 Then clicked on **Save & Close**

2

Welcome to your site!

Add a new image, change this welcome text or add new lists to this page by clicking on the edit button above. You can click on Shared Documents to add files or on the calendar to create new team events. Use the links in the getting started section to share your site and customize its look.

3

Welcome to the Finance Team

Add a new image, change this welcome text or add new lists to this page by clicking the edit button above. You can click on Shared Documents to add files or on the calendar to create new team events. Use the links in the getting started section to share your site and customize its look.

4

Welcome to the Finance Team

Add a new image, change this welcome text or add new lists to this page by clicking the edit button above. You can click on Shared Documents to add files or on the calendar to create new team events. Use the links in the getting started section to share your site and customize its look.

*There is a second option available under the **Select** drop-down menu – Text division. If you had selected Text division rather than Paragraph, all of the content in the left content block (and SharePoint has named this the Text division by default) would have been selected rather than just the paragraph which is what we wanted.*

Notice that as you hover over a selection in the drop-down menu, SharePoint displays a red dashed box to show what will be selected if you choose the option.

7

Welcome to the Finance Team

Add a new image, change this welcome text or add new lists to this page by clicking the edit button above. You can click on Shared Documents to add files or on the calendar to create new team events. Use the links in the getting started section to share your site and customize its look.

For Your Reference…

To **insert** and **format text**:
1. Display the page and place it in edit mode
2. Click where you want to insert the text
3. Type the text
4. If desired, select the text and click on a tool or command on the **Format Text** tab

Handy to Know…

- You can change how a page is laid out by using the **Text Layout** command on the **Format Text** tab. From this drop-down menu, you can change the layout to two columns (which is the layout for a default team site's home page), two column with header and footer, three columns, and more.

INSERTING TABLES

You can insert a table into a page just like you do in Word. And once inserted, you can edit a table by clicking in it to display the two contextual tabs and then selecting the desired options. The **Layout** tab lets you alter the table's layout (inserting and removing rows and columns, specifying row height, etc) while the **Design** tab lets you apply styles, select header rows and more.

Example:

1 We placed the Home page in edit mode

2 Then we clicked between the image and the Getting Started information

To insert a table in this blank paragraph…

3 We clicked on the **Insert** tab, then clicked on **Table** to display the **Insert Table** grid

This command operates very similarly to Word…

4 Next we clicked on the second square in the top row to insert a table with one row and two columns

You can insert text into this table just as you do in Word. Two Table Tools tabs will also open which let you format the table…

5 Then we clicked on the **Design** tab to see the available options, then clicked on **Styles** and selected **Table Style 3 – Medium Two Tones** to apply this style

To delete it…

6 We clicked on the **Layout** tab, then clicked on **Delete** and selecedt **Delete Table**

7 Finally we clicked on **Save & Close** on the **Format Text** tab

---
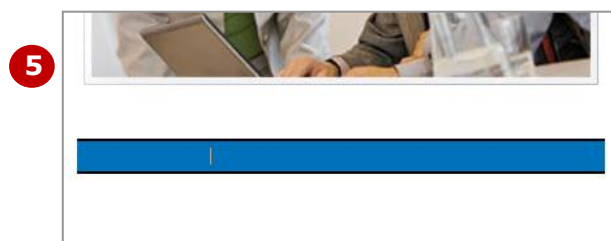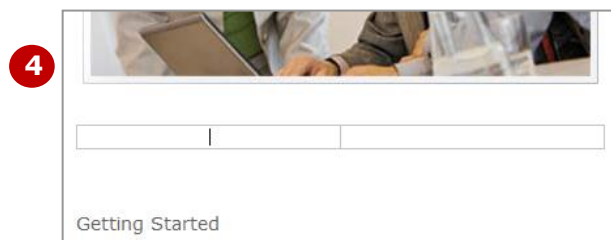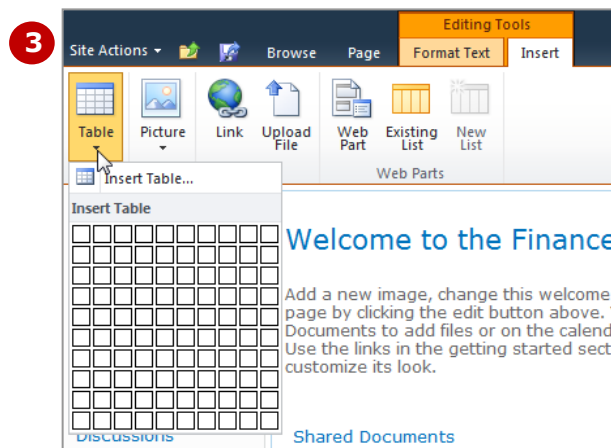
For Your Reference...

To *insert* a *table*:
1. Display the page and place it in edit mode
2. Click where you want to insert the table
3. Click on **Table** on the **Insert** tab
4. Select the number of rows and columns
5. Format the table as desired

Handy to Know...

- If you don't want to select the number of columns and rows for your table by clicking on the squares in the quick grid option, you can click on **Insert Table**. This will open a dialog box into which you can type the required number of columns and rows for your table.
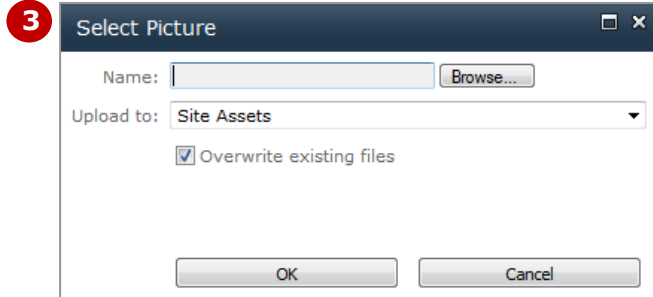

INSERTING PICTURES

You can insert images into a page by clicking in the desired location and selecting the *Picture* command on the *Insert* tab. Once inserted, you can format the picture using the *Design* tab.

For example, you can set alternate text for the image (this text can be read by visually impaired people using screen reader applications), apply an image style border and resize the image.

Example:

1 We placed the Home page in edit mode

To replace the stock image with our own…

2 We clicked on the image to select it, then pressed `Del` to delete it

3 Then we clicked on the *Insert* tab, then clicked on the lower half of *Picture* and selected **From Computer** to open the *Select Picture* dialog box

4 Next we clicked on **[Browse]**, navigated to the course files folder, clicked on *Team Image*, and clicked on **[Open]**

By default, the image will be uploaded to the Site Assets library in your site…

5 Then we clicked on **[OK]** and then clicked on **[Save]** to insert the image into the page

To resize it…

6 We ensured that the image was selected and that *Lock Aspect Ratio* was ticked on the *Picture Tools: Design* tab, then selected *800 px* in *Horizontal Size*, typed **395 px** and pressed `Enter` to resize the image

7 Finally we clicked on *Save & Close* on the *Format Text* tab

3

Select Picture

Name: [   ] [Browse...]

Upload to: [Site Assets   ▼]

☑ Overwrite existing files

[OK   ] [Cancel   ]

5

6

For Your Reference…

To *insert* a *picture* into a page:
1. Display the page and place it in edit mode
2. Click where you want to insert the picture
3. Click on *Picture* on the *Insert* tab
4. Browse to the image and click on **[Open]**
5. Format the picture as desired

Handy to Know…

• Rather than deleting the picture and inserting a new one, you could have *changed* it. To do this, click on the image, click on the lower half of *Change Picture* and select **From Computer**, browse to the folder, click on the image, click on **[Open]** and then click on **[Save]**.
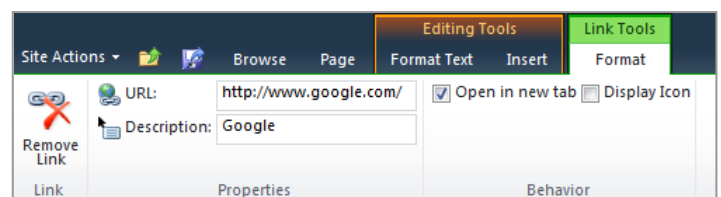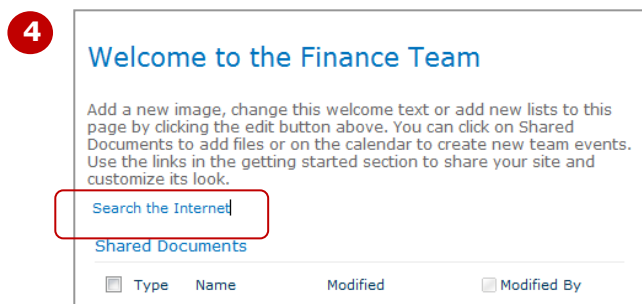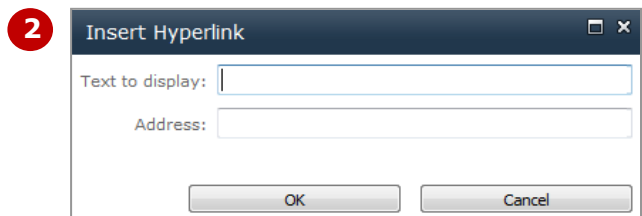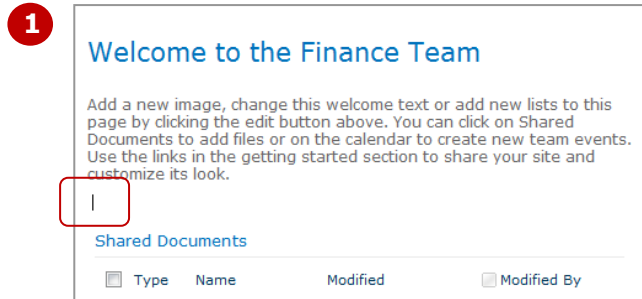

INSERTING LINKS

If you have internet sites that your users regularly visit, such as suppliers or clients, you can insert hyperlinks into a page that, when clicked, will open their sites in the browser. You can either insert new text or select existing text for the hyperlink. After inserting a link, you can modify its properties by clicking on the link and opening the *Link Tools: Format* tab.

Example:

1 We placed the Home page in edit mode, then clicked in the blank area between the Welcome text and the *Shared Documents* web part

2 Then we clicked on the *Insert* tab, then clicked on *Link* to open the *Insert Hyperlink* dialog box

To insert a link to a well-known search engine (as an example)…

3 We typed **Search the Internet** in *Text to display*

4 Then typed d**http://www.google.com/** in *Address*, then clicked on **[OK]** to insert the link and open the *Link Tools: Format* tab

5 Next we typed **Google** in *Description*, then clicked on *Open in new tab* in the *Behaviour* group

The Description will appear when you hover over the link…

6 Then clicked on *Save & Close* on the *Format Text* tab

To test the link…

7 We clicked on *Search the Internet*

Google will open in a new window or tab…

8 Close the new browser window or tab to return to SharePoint

1

Welcome to the Finance Team

Add a new image, change this welcome text or add new lists to this page by clicking the edit button above. You can click on Shared Documents to add files or on the calendar to create new team events. Use the links in the getting started section to share your site and customize its look.

Shared Documents

Type   Name   Modified   Modified By

2

Insert Hyperlink

Text to display:

Address:

OK   Cancel

4

Welcome to the Finance Team

Add a new image, change this welcome text or add new lists to this page by clicking the edit button above. You can click on Shared Documents to add files or on the calendar to create new team events. Use the links in the getting started section to share your site and customize its look.

Search the Internet

Shared Documents

Type   Name   Modified   Modified By

Site Actions ▾   Browse   Page   Format Text   Insert   Editing Tools   Link Tools   Format

Remove Link

URL: http://www.google.com/
Description: Google

☑ Open in new tab ☐ Display Icon

Link   Properties   Behavior

5

INSERTING LIST AND LIBRARY WEB PARTS

A web part is a server control that serves a particular purpose, such as the **Shared Documents** web part on the home page that displays the data in this document

library. Users with the default **contribute** permissions can insert only a few web parts, but you can insert web parts for all lists and libraries that exist in your site.

Example:

1 We placed the Home page in edit mode, then clicked in the blank area beneath the image

2 Then we clicked on the **Insert** tab, and clicked on **Web Part** to open the **Web Parts** panel across the top of the page

This panel shows all web parts grouped into categories…

3 We ensured that **Lists and Libraries** is selected under **Categories**, then click on **Announcements** under **Web Parts** and click on **[Add]**

The Announcements web part inserted into the page, ready for you to insert new items…

4 Next we clicked to the right of the **Announcements** title to select the web part and open the **Web Part Tools: Options** tab, then clicked on the **Options** tab to see the available options

5 We clicked on **Minimise**, then clicked on **Save & Close** 🖼 in the ribbon

To restore the web part again…

6 We clicked on **Edit** 📝, clicked on the blue line under **Announcements** to select the web part, then clicked on **Restore** on the **Options** tab

7 Finally we clicked on **Save & Close** 🖼
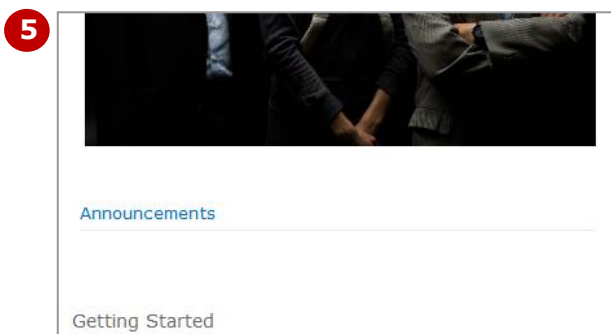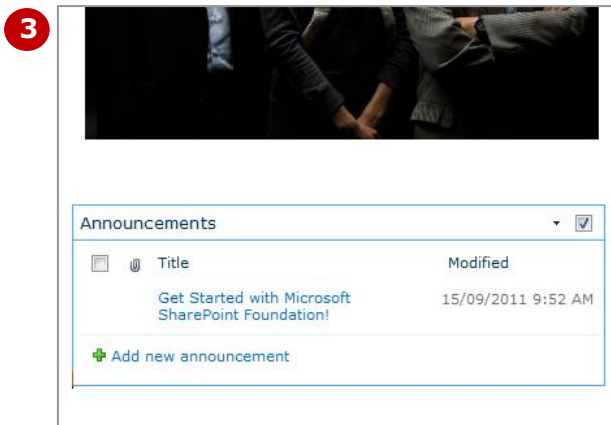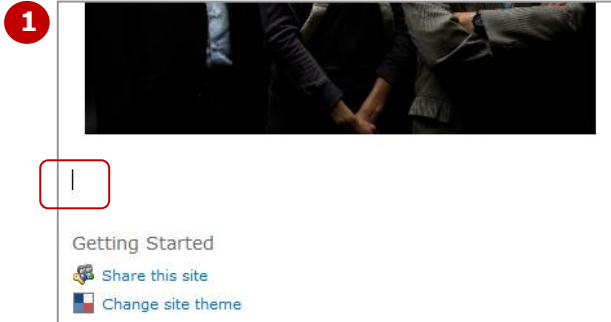
For Your Reference...

To **insert** a **list** or **library web part**:

1. Display the page and place it in edit mode
2. Click where you want to insert the web part
3. Click on **Web Part** on the **Insert** tab
4. Click on the desired web part, then click on **[Add]**

Handy to Know...

- Because we were inserting a web part for a list or library in this exercise, we could have also clicked on **Existing List** on the **Insert** tab at step **2**. The **Existing List** option shows only the web parts that belong to the **Lists and Libraries** category in the dialog box rather than showing all categories.
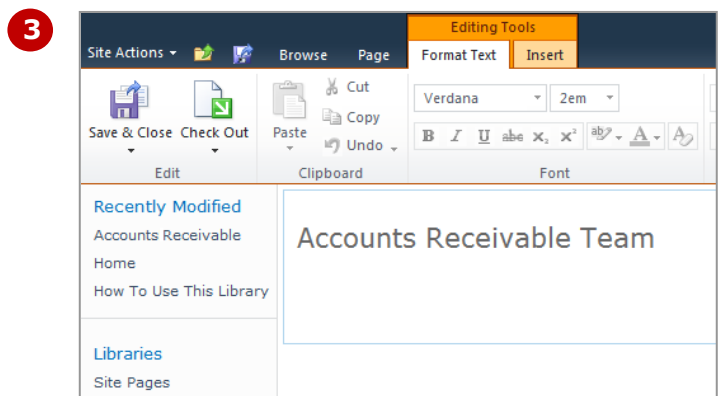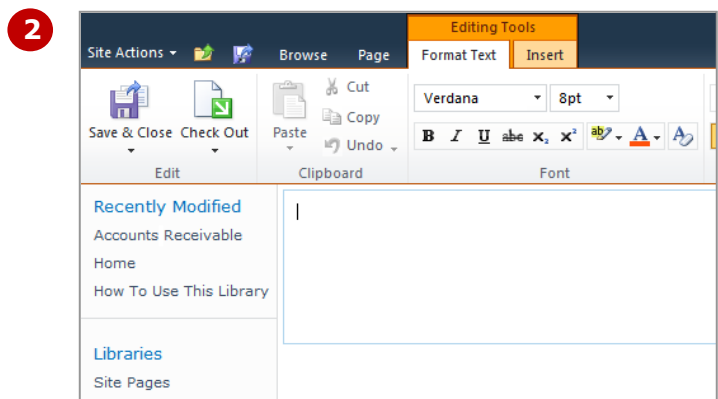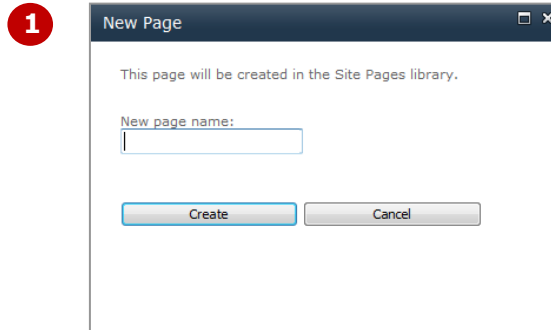
CREATING A NEW WIKI PAGE

Wiki pages are very simple web pages into which you can insert content such as text, images, videos, hyperlinks and more. When you create a wiki page, you may be prompted to create two new libraries for the site if they don't already exist: *Site Pages* (for the wiki pages) and *Site Assets* (for any images and other files – these are known as assets – that you upload into the page).

Example:

1 We clicked on **[Site Actions]** and selected **New Page** to open the **New Page** dialog box

It's important to name the file carefully – make it short but meaningful. This name becomes both the file's name (used in the URL) and title (appears in the breadcrumb)…

2 Then typed **Accounts Receivable** in **New page name**, then clicked on **[Create]**

The new wiki page will open in edit mode ready for you to add content into the blue box…

3 We typed **Accounts Receivable Team**, then selected the text, clicked on **Markup Styles** and selected **Heading 1** to apply this style. We clicked away from the text to see the result

4 Next we clicked on the **Insert** tab to see that we can insert the same type of content just as we could when we edited the Home page

5 Finally we clicked on **Save & Close** to save the page

The page is called Accounts Receivable in the breadcrumb trail…

1

New Page

This page will be created in the Site Pages library.

New page name:

Create   Cancel

2

3

For Your Reference…

To *create* a *new wiki page*:

1. Click on **[Site Actions]** and select **New Page**
2. Type a page name
3. Click on **[Create]**
4. Edit the page as desired

Handy to Know…

- You can rename a wiki page if necessary. To do this, open the page by clicking on its link in the *Site Pages* document library (on the *All Site Content* page). Switch to edit mode, then click on *Rename Page* on the *Page* tab. Note, however, if you rename a page, you will break any links that point to this page.
- permission other types of pages

LINKING TO AN EXISTING WIKI PAGE

Wiki syntax lets you create links to existing pages on the fly. You can display a pop-up menu listing all pages in the site by typing *[[*. After selecting the page and typing *]]*, the page's name will be automatically converted to a link. You can't change this link text so it's important that wiki pages are named appropriately when they're created (which is why we included a space in our wiki page name).

Example:

1 We placed the Home page in edit mode, then clicked in a blank area below the ***Shared Documents*** web part

To add some text and link it to the wiki page that we created …

2 We typed **For extra team information:** then pressed Enter to create a new paragraph

3 Then we clicked on ***Bullets*** in the ***Paragraph*** group to convert this paragraph to a bullet list item, then typed **[[**

A pop-up menu will appear displaying the pages in the site. If the menu doesn't appear, press Ctrl *+* Space *…*

4 We clicked on ***Accounts Receivable*** and typed **]]** to complete the link

The page's name will display as the link text…

5 Then clicked on ***Save & Close*** to save the page

The link will be purple indicating that it links to an existing page. To test it…

6 We clicked on the ***Accounts Receivable*** link to display the ***Accounts Receivable*** wiki page, then navigated back to the Home page

---
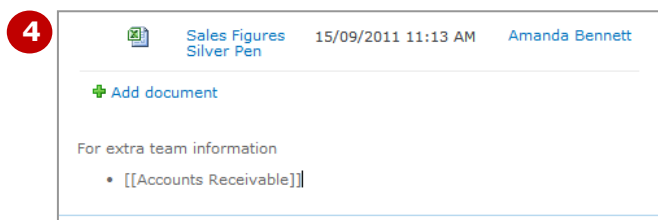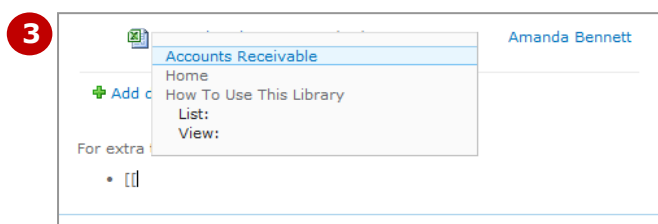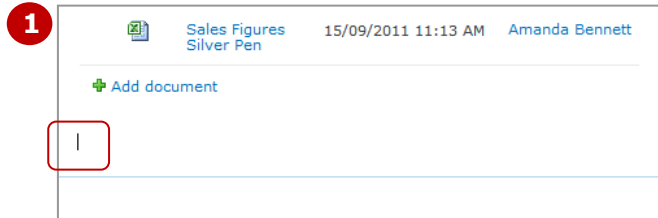
For Your Reference...

To ***create*** a ***link*** to an ***existing page***:

1. Display the page and place it in edit mode
2. Click where you want to insert the link
3. Type **[[**
4. Select the desired page and type **]]**

Handy to Know...

- You can link existing text to a page. To do this, select the text to be linked, then click on ***Link*** on the ***Insert*** tab. The selected text will appear in ***Display***. Type the URL to the wiki page in ***Address*** – for example: ***/sites/london/train1/ sitepages/accounts receivable.aspx***.
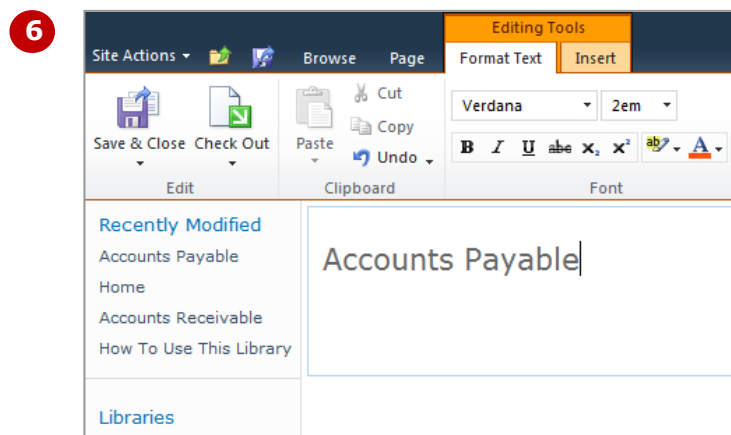

LINKING TO A NEW WIKI PAGE

If you want to link text to a page that doesn't exist, you don't need to stop and create the page first. Using wiki syntax, you can type the text that you want to be converted to a link inside double square brackets and it will be saved as a link. The link will appear with a black dotted underline showing that the page doesn't exist. Clicking on this link will then let you create the new page.

Example:

1 We placed the Home page in edit mode, then clicked at the end of the ***[[Accounts Receivable]]*** link and pressed Enter

2 We typed **[[Accounts Payable]]**

As you are typing, a message will appear informing you that the item doesn't exist…

3 Then we clicked on **Save & Close**

The link will be blue with a black dotted underline. To create the page…

4 We clicked on the ***Accounts Payable*** link to open the ***New Page*** dialog box

5 Then clicked on **[Create]** to create the ***Accounts Payable*** page and open it in edit mode

6 Next we typed **Accounts Payable**, then selected the text, clicked on ***Markup Styles*** and selecedt **Heading 1** to apply this style. We clicked away from the text to see the result

7 Finally we clicked on **Save & Close**, then navigated to the Home page

The link is purple now showing that the linked page exists

2

Sales Figures Silver Pen   15/09/2011 11:13 AM   Amanda Bennett

➕ Add document

For extra team information:
- [[Accounts Receivable]]
- [[Accounts Payable]]

3

Sales Figures Silver Pen   15/09/2011 11:13 AM   Amanda Bennett

➕ Add document

For extra team information:
- Accounts Receivable
- Accounts Payable

6

| Site Actions ▾ | Browse | Page | Editing Tools — Format Text | Insert |

Save & Close | Check Out | Paste | Cut | Copy | Undo | Verdana | 2em | **B** *I* U abc x₂ x² | A

Edit | Clipboard | Font

Recently Modified
Accounts Payable
Home
Accounts Receivable
How To Use This Library

Libraries

Accounts Payable

7

Sales Figures Silver Pen   15/09/2011 11:13 AM   Amanda Bennett

➕ Add document

For extra team information:
- Accounts Receivable
- Accounts Payable

For Your Reference…

To **link** to a **new page**:
1. Display the page and place it in edit mode
2. Click where you want to insert the link
3. Type **[[new page name]]**, then click on **Save & Close**
4. Click on the new link and click on **[Create]** to create the new page

Handy to Know…

- If you don't have time or the information to create all pages to which you have linked, other people can come along at a later date and create the pages for you. The dotted underlines and blue colouring clearly highlight links to non-existent pages.

DELETING A WIKI PAGE

Because it's so easy to create and populate wiki pages, if you add a lot of content to a page and then decide that it needs a lot of editing, you may find that it's actually quicker and easier to delete the page and start again. Wiki pages are usually stored in the **Sites Pages** document library so to delete an unwanted page, you simply select it in this library and click on **Delete Document**.

Example:

1 We selected **Site Actions** > **New Page** to open the **New Page** dialog box, typed **Test** in **New page name** and clicked on **[Create]**

To see how easy it is to delete an unwanted page…

2 We clicked on **All Site Content** in the Quick Launch bar to opened the **All Site Content** page

3 Then we clicked on **Site Pages** under **Document Library** to display all pages stored in this library

The Test, Accounts Payable and Accounts Receivable pages are listed, as well as two other pages…

4 We hovered over **Test**, then clicked on its check box to select the page and opened the **Documents** tab

5 Then clicked on **Delete Document** in the **Manage** group – a message box will display

6 Finally we clicked on **[OK]** to delete the page
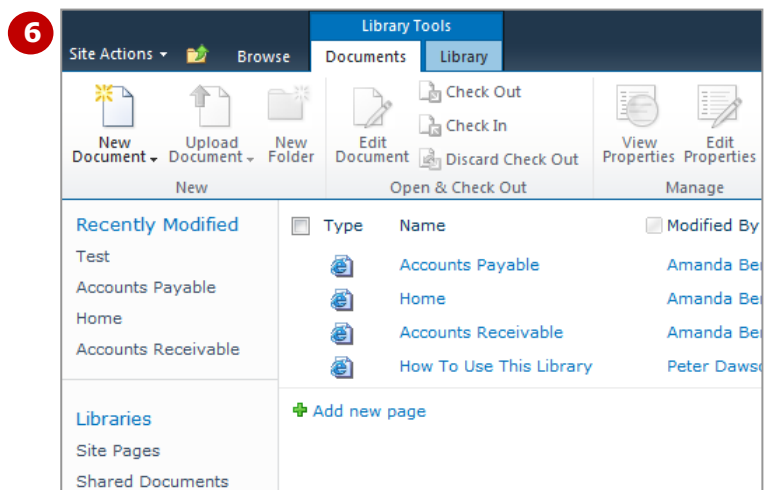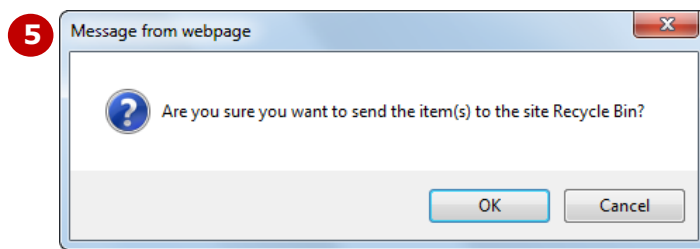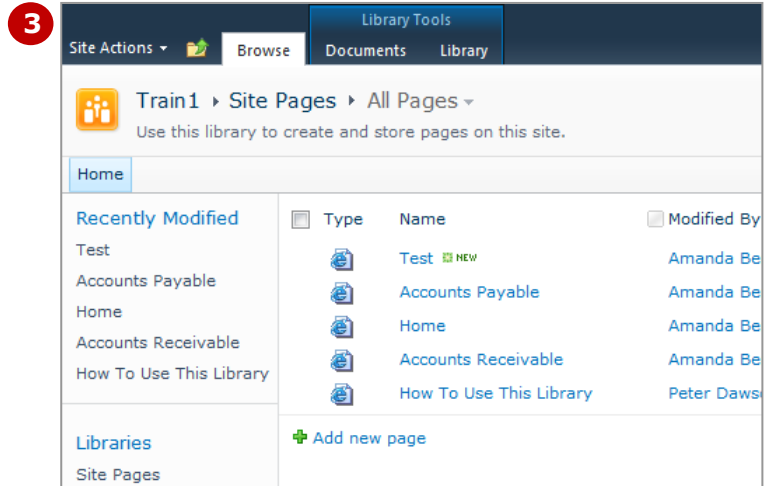
For Your Reference…

To **delete** a **wiki page**:

1. Click on **All Site Content** in the Quick Launch bar, then click on **Site Pages**
2. Select the desired page
3. Click on **Delete Document** in the **Manage** group on the **Documents** tab, then click on **[OK]**

Handy to Know…

- If you have existing links to a deleted page, the linked text will change from purple to blue with a black dotted underline.

CONCLUDING REMARKS

Congratulations!

You have now completed the **Creating and editing pages** booklet. This booklet was designed to get you to the point where you can competently perform a variety of operations as listed in the objectives on page 2.

We have tried to build up your skills and knowledge by having you work through specific tasks. The step by step approach will serve as a reference for you when you need to repeat a task.

Where To From Here...

The following is a little advice about what to do next:

- Spend some time playing with what you have learnt. You should reinforce the skills that you have acquired and use some of the application's commands. This will test just how much of the concepts and features have stuck! Don't try a big task just yet if you can avoid it - small is a good way to start.

- Some aspects of the course may now be a little vague. Go over some of the points that you may be unclear about. Use the examples and exercises in these notes and have another go - these step-by-step notes were designed to help you in the classroom and in the work place!

Here are a few techniques and strategies that we've found handy for learning more about technology:

- visit CLD's e-learning zone on the Intranet

- read computer magazines - there are often useful articles about specific techniques

- if you have the skills and facilities, browse the Internet, specifically the technical pages of the application that you have just learnt

- take an interest in what your work colleagues have done and how they did it - we don't suggest that you plagiarise but you can certainly learn from the techniques of others

- if your software came with a manual (which is rare nowadays) spend a bit of time each day reading a few pages. Then try the techniques out straight away - over a period of time you'll learn a lot this way

- and of course, there are also more courses and booklets for you to work through

- finally, don't forget to contact CLD's IT Training Helpdesk on **01243-752100**