MODULE 9 Creating Publishing Sites

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Module Overview

This module explains how to use the publishing features of SharePoint 2016 to create rich content pages, as well as the features that limit the types of layouts, images and templates available to users. While some organizations need the document storage and dashboard capabilities SharePoint can offer, others may need a centralized way to distribute informational content to users, who will not otherwise interact with SharePoint in a more robust way.

After completing this module, students will be able to:

• Enable web content management

• Create a Managed Metadata navigation site

• Implement image constraints

• Define the structure of pages

• Implement a publishing workflow

Lesson 1: Enabling Web Content Management

Web content management (WCM) is a set of tools that enable individuals with little technical knowledge to create and author web pages on a public website or company portal. SharePoint 2016’s web content management capabilities include page authoring and publishing which gives companies the ability to create a more robust company portal similar to a public website. In order to use the web content management feature, the SharePoint Publishing feature must be activated. This feature is automatically activated on sites created using a Publishing template. On other sites, the Publishing feature may be manually activated.

Master Pages, Page Layouts, Pages and Field Controls

The following table defines key terms related to web content management.
<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Master Page</td>
<td>A master page defines the share structural and functional elements across pages in a site. Content placeholders are initially defined in the master page(s) of a site and are analogous to regions in page layouts that use a particular master page.</td>
</tr>
<tr>
<td>Page Layout</td>
<td>Page layouts further define content placeholder regions by designating the layout, configurations and functionality of sites for end-users to place content.</td>
</tr>
<tr>
<td>Page</td>
<td>Pages represent published contents from the end-user experience. End-users have the ability to add content to column, fields and field controls within page layouts.</td>
</tr>
<tr>
<td>Field Control</td>
<td>Display templates control the layout of search results and any elements common to all results such as paging, sorting, and other links. Item display templates control how each search result is displayed and repeated for each result.</td>
</tr>
</tbody>
</table>

Every page in SharePoint uses these three basic elements to render the final to the end-user.

- The **Master page** contains all the common elements and functionality of a site. This includes the branding elements, navigational elements and placeholders for content regions that are further defined in a page layout.
- The **Page layout** contains discreet functionality for certain types of pages in a site and contain the specific content regions available when authoring a page such as images or rich text fields.
- **Pages** are then generated from page layouts that the end-users use to author content. Multiple pages can be created within a SharePoint site using a variety of page layouts.

![Diagram of components of a page]

**Components of a page**

**Master Pages**

SharePoint master pages contain all the persistent elements of a site. These include navigation, footer content, site settings, editing content, and references to any global customizations. Master pages relate to page layouts by defining the regions that the page layout can influence in the rendered page. The master page does this by using content placeholders. Although additional content placeholders exist and can be created, this illustration shows how the default content place holder (**PlaceholderMain**) partitions a specific region of the rendered page for editing interactions.
Content regions and content placeholders

In the previous image, the green region labeled Page layout, is appearing within the defined region called PlaceHolderMain in the master page for the site.

Page Layouts

Layout templates are designed for specific classes of pages within a site. These templates can be changed while editing pages within a Publishing site. Page layouts designate the organization and layout of page field controls.

Page Field Controls

Page field controls allow for further control of page elements. For example, the Content Search Web Part can specify control templates that manage the appearance of elements within that particular field control, as in the following illustration.
Activating the Publishing Features and Creating a Web Content Management Site

In order to leverage SharePoint’s web content management features, the SharePoint Publishing Feature must be active at the site and site collection levels.

1. Navigate to the top level site of the site collection.

2. Click **Settings > Site settings**.

3. Click **Site Collection Administration > Site collection features**.
Site collection features

4. Click **Activate** next to the **SharePoint Server Publishing Infrastructure** item. Now that the **Publishing Infrastructure Feature** is active for the site collection, a new site template is available to site and site collection administrators.

5. Click **Settings > Site contents**.

6. On the **Site Contents** page, click **new subsite**.

7. Enter a **Title** and **URL** name for the site.

8. Select the **Publishing Site with Workflow** template found underneath the **Publishing** tab.

9. Click **Create**.
Lesson 2: Managing the Structure of Web Content

Enabling web content management gives site administrators and content contributors the ability to create and publish web pages within an intranet site. This introduces a new challenge for site administrators around maintaining structure and consistency in the presentation of content. Site administrators have the ability to create multiple web pages within their site as well as leverage the web content management tools such as inserting images, formatting text and tables.

Working with Pages

SharePoint 2016 offers a set of predefined web page templates, which are listed in the following table.

<table>
<thead>
<tr>
<th>Template Name</th>
<th>Description and use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Body Only</td>
<td>This article style page layout contains a large content region.</td>
</tr>
<tr>
<td>Image on left</td>
<td>This article style page layout contains a large content region and an image placeholder that is positioned on the left of the template</td>
</tr>
<tr>
<td>Image on right</td>
<td>This article style page layout contains a large content region and an image placeholder that is positioned on the right of the template</td>
</tr>
<tr>
<td>Summary Links</td>
<td>An article style page layout that contains a large content region and a summary links web part that is positioned on the right of the template.</td>
</tr>
<tr>
<td>Blank Catalog Item</td>
<td>This page layout for creating welcome pages contains a title and page content populated by way of the content index and a remote catalog item.</td>
</tr>
<tr>
<td>Catalog Item Image on Left</td>
<td>This catalog item page with image on left contains an image field and a rich text field which are both populated by way of the content index and a remote catalog item.</td>
</tr>
<tr>
<td>Basic Page</td>
<td>A wiki style layout used within a publishing site or wiki site. It includes a category field based upon the Managed Metadata service.</td>
</tr>
<tr>
<td>Error</td>
<td>The error page is used for 404 HTTP errors.</td>
</tr>
<tr>
<td>Basic Project Page</td>
<td>A wiki-style page layout used in conjunction with a project site. It includes a category field based on the Managed Metadata service, a URL field, a contact field and a status list.</td>
</tr>
<tr>
<td>Redirect</td>
<td>This page layout contains a redirect control for automatically directing readers to any specified URL.</td>
</tr>
<tr>
<td>Blank Web Part page</td>
<td>A welcome page style layout containing a content region and several web part zones. Often used as a home page for a site.</td>
</tr>
<tr>
<td>Splash</td>
<td>A welcome page style layout containing an image placeholder, several web part zones and two summary links web parts and is often used as a home page for a site.</td>
</tr>
<tr>
<td>Summary Links</td>
<td>A welcome page style layout containing an image placeholder, content region, several web part zones and two summary links web parts. Often used as a home page for a site.</td>
</tr>
</tbody>
</table>

Controlling the List of Available Page Layouts

Module 4 covered the option to control the list of available site templates and page layouts within a site. Site administrators may want to restrict the list of page layouts available to content contributors in order to control the structure of the site and create consistency in the presentation of content.

1. Navigate to the News site and click Settings > Site Settings > Look and Feel > Page layouts and site templates.
Accessing page layouts and site templates

2. In the Page Layouts section, select Pages in this site can only use the following layouts option.

3. Double-click the page layouts to be removed from the list of available templates.

Choosing available page layouts

4. In the New Page Default Settings section, select the Image on Right layout as the default by selecting it within the scrolling textbox.

The Default Page needs to be one of those included in the Page Layouts section.

5. In order for all subsites that are created to inherit these new page settings, click the Reset all subsites to inherit these new page settings checkbox.

6. Be sure to check the box that reads, Convert blank spaces in the page name to ‘-‘. This will ensure that the ‘-‘symbol will replace any spaces that are inadvertently added to a page file name.
New page default settings

7. Click OK.

Configuring Image Renditions

Image renditions are predefined settings for resizing uploaded images. This allows site and site collection administrators to use the same image and display it at different sizes throughout a publishing site. When creating an image rendition, the site or site collection administrator specifies the width and/or height for all images that use that image rendition.

As content contributors upload images to a library in the site collection they are presented with a set of available image renditions to select in order to automatically create a variation of the image. Additionally, content contributors have the ability to crop the image and control the portion of the image that is used in the image rendition.

In order to use image renditions the SharePoint server administrator must confirm that disk-based BLOB cache is enabled for the web application and the SharePoint Server Publishing must be active under Site Features.

1. In the site, click Settings > Site Settings > Look and Feel > Image Renditions.

Accessing image renditions

2. Review the set of predefined image renditions.

3. Click Add new item.
Adding an image rendition

4. Type a descriptive name for the image rendition in the **Name** box.

5. Type the width and height.

6. Click **Save**.

**New image rendition**

When enabling the SharePoint Server Publishing feature, an Images library is created automatically within the site.

Adding Content to Pages

1. In the site, Go to **Settings > Edit page**.

**Editing a page**

Notice the expanded ribbon and the page status message indicating that the page is checked out.
Check out message

2. Click in the Page Content region and type Sample News Heading.
3. Highlight the text with the cursor.
4. Click Format Text > Styles > Heading 1 in the ribbon. Notice the selected text updates to reflect the style.
5. Rollover any other styles in this menu and notice the selected text renders a preview below on the selection.
6. Click Save to keep the changes.
7. Click Published to check in and make all changes visible to all users.

Inserting Images into a Content Region and Applying Image Renditions

1. Go to Settings > Edit page.
   1. Click in the Page Content region.
   2. Click the Insert > Picture from the Media section > From Computer.
   3. Click Browse.
   4. Locate the photo on the computer and double-click to select the picture.
6. Select the **Images** library from the **Destination Library** drop-down menu.

7. Click **OK**.

8. Type a **Title** for the image.

9. Click **Save** to proceed with uploading the image to SharePoint.

10. While the picture is selected within the content region, click **Image > Pick rendition** from the **Select** section. Notice the photo is automatically updated based upon the selected rendition.

11. To adjust the cropped portion of the image, click **Edit Renditions**.

12. Below the image to adjust, click **Click to change**.

13. Use the mouse to move the crop placement as well as adjust the crop area by clicking on the corners of the crop selection.

14. Review the new cropped photo in the **Preview** box.
Cropping a rendition

15. Click **Save**.

16. Click **OK**.

When changing a cropped area, it may take a few minutes before the change is propagated throughout the site.

17. Continue authoring the page adding the desired content to the rest of the page.

18. Click **Save** to keep the changes.

19. Click **Published** to check in and make all changes visible to all users.

Inserting Images into an Image Placeholder and Applying Image Renditions

1. Navigate to the site.

2. Click **Edit** in the global toolbar.

3. Click in the **Page Image** placeholder to insert a picture from SharePoint.

4. Click **Browse** to locate an image within a SharePoint image library.
Inserting an image

5. To navigate to a different site or library, click the name of the site then library in the left navigation.

6. Click the file in the right panel to select it.

7. Click Insert.

8. Select the desired image rendition from the **Image Rendition** drop-down menu.

Choosing a rendition

9. Type a descriptive sentence for the image in the **Alternate Text** box.

   It is a best practice to always describe what the photograph is in the alternate text box for users who have visual accessibility requirements and use readers to interact with web sites.

10. Leave the remaining fields with the default values and click **OK** to insert the picture into the page.

11. Click **Save** to keep the changes.

12. Click **Published** to check in and make all changes visible to all users.

Changing Page Layouts
During the content creation process, a page author may decide that the current layout is not suited for the content being added to the site. A content author has the flexibility to change page layouts to one of the alternate layouts without losing content, images or web parts already added to the page.

1. Click Settings > Edit page.

![](image)

**Editing a page**

2. Click the Page > Page Layout in the Page Actions section.

![](image)

**Choosing a page layout**

3. Click an alternate layout. Notice the content and images shift to the new designate content regions.

> Alternate page layouts may contain more or fewer content regions (i.e. web part zones, image or content placeholders). When changing a layout to one with fewer content regions defined in the template, the information stored in the original layout is not deleted. Rather it is simply hidden in the new layout because the template does not have that region defined in the template.

Swapping a layout back to the original layout will make the content visible again.
4. Click **Save** to keep the changes.

5. Click **Published** to check in and make all changes visible to all users.

**Lesson 3: Navigating a Site using Managed Metadata**

In a previous module, the Managed Metadata service was introduced as a method to tag documents in order to increase the findability of content. In SharePoint 2016, the Managed Metadata service can also be used to provide an alternative to the traditional structural SharePoint navigation feature. Using the Managed Metadata service, navigation can be driven by a taxonomy. This service also offers a framework for dynamically generating pages while providing SEO friendly URLs. As pages are created within a publishing site using the Managed Metadata navigation, they are represented in the navigation hierarchy. Additionally, in circumstances where companies need to share or publish content across multiple department sites, the Managed Metadata navigation supports the ability to connect a single page to multiple terms instead of requiring separate pages to be authored. A good example of where this may be applicable is on summary style pages that contain a query web part that renders announcements or events from multiple sources.

**Enabling Managed Metadata navigation on a Publishing Site**

1. Navigate to the **News** site within the **Learning Lake** site.

2. Click **Settings > Site Settings > Look and feel > Navigation**. The Managed Metadata navigation settings can be applied to global navigation, current navigation or both.

3. Click **Managed Navigation**: The navigation items will be represented using a Managed Metadata term set.

4. In the **Managed Navigation: Term Set** section, click **Create Term Set**.
Creating a term set

A new term set is created under the **Site Collection** group and is given the same name as the site.

Verifying creation of a term set

5. Click **OK**. Notice the left navigation is updated removing the structural navigation.

6. Click **Settings > Add a page**.
7. Type the text **Recent News** as the name for the new page. Notice the URL for the page shows in the **Add a page** box.

![Add a page]

**Naming a page**

8. Click **Create**. Notice the newly created page is added to the left navigation.

![As pages are created in a site using the Managed Metadata navigation feature the page name is automatically added to the term set.]

9. Continue authoring the content on the page. Then, click **Publish > Publish** in the **Publishing** section to save and published the page. Notice the URL of the page is in a friendly format and does not contain additional text such as /pages/news.aspx.

10. Create a second page by clicking **Settings > Add a page**.

11. Type **Press Releases** as the page name.

12. Click **Create**.

13. Continue entering text and click the **Publish > Publish to save and publish the page** from the **Publishing** section.

14. Notice the newly created page also appears in the left navigation and is at the same level as **Recent News**.

**Controlling the Navigation and Page Structure**

Having a site based upon the Managed Metadata navigation means that all pages reside within a single pages library. The appearance of a hierarchy structure is based upon the structure of the terms within the sites navigational term set. This method gives site owners the ability to easily reorganize their site’s structure by updating the order and sorting of terms within a term set.

1. Click **Settings > Site Settings > Site Administration > Term Store Management**.

2. Click to expand the **Site Collection Group**.

3. Locate the **News Navigation Term Set**.

4. Right-click **Press Releases**.

5. Select the option to **Move Term**.
Moving a term

6. Click Recent News in the window.

7. Click OK to move the term under Recent News.

Verifying the move

8. Navigate back to the Learning Lake News site.

9. Notice that Press Releases is indented and is now a child page under Recent News.

Noting the change in the Quick Launch

Advanced Properties for Managed Metadata Navigation

The Managed Metadata Service provides flexibility to control the behavior of terms and their associated pages. This is beneficial in cases where two terms need to point to the same content page.

1. Click Settings > Site Settings > Site Administration > Term Store Management.

2. Click to expand the Site Collection group.

3. Locate the News Navigation Term Set.
4. Click **Recent News**.

5. Click the **Navigation** tab.

The following table describes the configuration options on the **Navigation** tab.

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Navigation Node Title</td>
<td>This is the name of the title as it appears in the navigation menu.</td>
</tr>
<tr>
<td>Navigation Hover Text</td>
<td>Alternate text appears when the mouse is placed over the navigational link.</td>
</tr>
<tr>
<td>Visibility In Menus</td>
<td>Shows the link in the global navigation or current navigation menus.</td>
</tr>
<tr>
<td>Simple Link or Header</td>
<td>Gives site administrators the ability to associate a term to a specific page.</td>
</tr>
<tr>
<td>Term-Driven page with Friendly URL</td>
<td>Gives site administrators the ability to leverage the friendly URLs including associating terms to a specific page.</td>
</tr>
<tr>
<td>Associated Folder</td>
<td>Gives administrators the ability to associate a term with a folder. When a visitor navigates to the page, the folder appears as a selected node.</td>
</tr>
</tbody>
</table>

**Managed Metadata navigation**

**Term-Driven Pages**

The following table describes the configuration options on the **Term-Driven Pages** tab.

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Target Page Settings</td>
<td>Change Target Page for this term</td>
</tr>
<tr>
<td>Used to specify the page that loads when this term is selected. Otherwise, it will be determined by the parent term.</td>
<td></td>
</tr>
</tbody>
</table>
### Configuring term-driven pages

To associate more than one term to one page, update the Target Page for this item to point to the same page. Doing so will add an additional status indicator on the page to notify the content author of the association.

#### Name | Description
--- | ---
Change Target Page for children of this term | Used to specify the page that loads when the child term is selected. Individual terms can override this setting.
Category Image | Used to select an image that is associated with this term. The image can be displayed using the Term Property web part.
Change Catalog Item Page for this category | Used to specify the page that loads when a catalog item under this category is selected. Otherwise, it will be determined by the parent category.
Change Catalog Item Page for children of this category | Used to specify the page that loads when a catalog item under a child category is selected. Individual categories can override this setting.

---

**Configure Friendly URL for this term**

This term defines a friendly URL:

```
/#press-releases
```

**Target Page Settings**

This is the page that loads when the Friendly URL is accessed. The term content passed to this page can be used to drive dynamic controls on the page.

- Change target page for this term
  - You can specify the page that loads when you navigate to this term’s friendly URL. Otherwise, it will be determined by the parent term.

- Change target page for children of this term
  - You can specify the page that loads when you navigate to a child term’s friendly URL. Individual terms can override this setting.

**Category Image**

Select an image that’s associated with this term. The image can be displayed using the Term Property Web Part.

**Catalog Item Page settings**

If this term is used as a catalog category, these settings define pages used to render catalog data for items under this category.

- Change Catalog Item Page for this category
  - You can specify the page that’s loaded when you navigate to a catalog item under this category. Otherwise, it will be determined by the parent category.

- Change Catalog Item Page for children of this category
  - You can specify the page that’s loaded when you navigate to a catalog item under a child category. Individual categories can override this setting.

---

**Edit Page**

You’re about to edit a page that’s used for multiple URLs.

**Edit Page Template**

Any changes you make will affect all the URLs that point to this page.

**View Affected URLs (2)**

**Edit Page for Single URL (2013)**

Create a copy of the page for the URL you were just on to edit it independent of other URLs.
Lesson 4: Configuring a Publishing Approval Workflow

Publishing Approval Workflow

The Publishing Approval workflow is the primary workflow for approving and publishing content such as documents, images and pages in a SharePoint publishing site. The benefit of the Publishing Approval workflow is that it can easily and efficiently route pages to others for approval and then immediate publishing. The publishing workflow must be manually started by the content author, and upon starting, emails are sent out to the responsible parties. Via email, the document, image or page can be approved or rejected. The email also provides the ability to request permission to view the document.

The Publishing Approval workflow is the only workflow that cannot be configured to start automatically upon an item being added or modified in a library.

Before configuring the Publishing Approval workflow, it is important to understand versioning in SharePoint.

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Minor Versioning</td>
<td>This allows content authors to check in a draft version of a page, document or image. Draft (or minor) versions are visible by the content authors, content approvers and site owners. Draft versioning must be enabled in order to leverage content scheduling of pages. On a list or library, a site administrator may configure the number of minor versions that need to be retained.</td>
</tr>
<tr>
<td>Major Versioning</td>
<td>This allows content authors to check in a major or publish a major version of a page, document or image. Major versions are visible to anyone that has access to read the contents of a site. On a list or library, a site administrator may configure the number of major versions that need to be retained.</td>
</tr>
</tbody>
</table>

Adding the Publishing Approval Workflow

Depending upon the site template used when provisioning the publishing site, the Publishing Approval workflow may already be configured on all lists and libraries throughout the site. If the workflow is not enabled the following steps will help site and site collection administrators enable the Publishing Approval workflow on a list or library.

1. Navigate to the pages library within the publishing site and click Library > Page Library > Library Settings.
2. Click Workflow Settings under Permissions and Management.
3. Keep the default option This List in the Show workflow association of this type drop-down menu.
4. Click Add a workflow.

5. Select the Publishing Approval workflow from the Select a workflow template section.

6. Type Pages Approval in the workflow name box.

7. Keep the default values under the Select a task list.

8. Keep the default values under the Select a history list.

9. Click the box next to Start this workflow to approve publishing a major version of an item. Observe the other options for starting a workflow. In this graphic, they are currently greyed out.
Choosing a start option

10. Click **Next**.

11. In the **Assigned To** box, enter the name, names or groups for those individuals that should approve the content prior to publishing a major version.

12. In the **Order** drop-down menu, select **serial** or **parallel** as the workflow path.

Choosing workflow approvers

When choosing the **One at a time (serial)** option, place the participants in the **Approvers** field in the order that they should receive the tasks.

13. If a group is selected for Approvers, then decide how SharePoint should treat the group. Either the group can be assigned the task, or each individual within the group can receive the task.

14. Type the default message the approvers will receive in the email message in the **Request** text box.

15. In the **Due Date for all Tasks** box, set a specific date if **All at once (parallel) Order** has been chosen.

16. If **One at a time (serial) Order** was chosen, then set the **Duration Per Task** and then **Duration Units** sections.
Other workflow settings

17. Select the box **Automatically reject the document if it is rejected by any participant.** This is important because the workflow will not continue to the rest of the individuals listed in the Assigned To box upon one person’s rejection.

18. Select the box **Automatically reject the document if it is changed before the workflow is completed.** This is important because the workflow will end if any changes are made to the document before the workflow is completed.

19. Select the box **Enable Content Approval** to automatically update the approval status after the workflow is completed. This will mark the content as approved and published.

20. Click **Save**.

21. Navigate to the **News** publishing site.

22. Click **Publish > Publishing > Submit** to start the Publishing Approval workflow.

23. On the workflow start page, review the message and duration per task, then click **Start**. Notice the page status indicates the page is waiting for approval.

24. Click the **Publish** tab. Notice the options to **Approve or Reject** the page request in the ribbon.
25. Click **Approve** to open the task.

![Image](2022-02-23T14:00:00Z/content)

**Setting workflow status**

- The list of approvers cannot be changed at the time of workflow initiation.

26. Click **Approve** or **Reject** to complete the task.

27. To reassign the task to a different approver, click **Reassign Task**. If approve was selected, the page status should be removed indicating it has been approved and published.

### Lab 1: Creating a Rich Publishing Site

To create a more efficient communication environment, Learning Lake would like to decrease the amount of company-wide email messages and move to a central repository within SharePoint for global communications. The Marketing Department's concerns about moving to SharePoint is the presentation of the pages. They would like the news site to be similar to a public website with rich content pages and images.

As a site owner, you are responsible for setting up a publishing site that contains all news postings for Learning Lake. Marketing has given you a specific set of sizes for images and a sample page layout that looks like the (Article Page) Image on right layout available within SharePoint.

After completing this lab, you will be able to:

- Create a web content management site for publishing news
- Set up and use image renditions for faster image management

**Estimated time to complete this lab:** 30 minutes

**Exercise 1: Creating a Web Content Management Site**
Before creating the site to contain news within the Learning Lake site, the SharePoint publishing feature must be activated at the root site collection.

2. Click Settings > Site settings.
3. Click Site Collection Administration > Site collection features.
4. Scroll down the list of features. If not already activated, click Activate next to SharePoint Server Publishing Infrastructure.
5. While on the Site Collection Features page, click Activate next to Publishing Approval Workflow.
6. Now that the Publishing Infrastructure feature is active for the site collection, a new site template is available to site collection administrators and site owners.

Exercise 2: Creating a News Site

Now that the publishing feature is activated, employees will have the new ability to publish their news story.

1. Click Settings > Site contents.
2. On the Site Contents page, scroll down to Subsites and click new subsite. Enter the following:
   a. Title: News
   b. Description: All the news that's fit to tell
3. Enter news for the URL for the new site.
4. Under Select a template, select the Publishing Site template found on the Publishing tab.
5. Select Yes for Use the top link bar from the parent site in the Navigation Inheritance section.

6. Click Create. (This will take a moment.)

7. Click Publish > Publish in the Publishing section to make the News site home page visible to others.

Exercise 3: Setting the Default Page Layout

The Marketing Department at Learning Lake would like the news pages to contain a title, image and date in addition to a rich text area. The (Article Page) Image on right page layout will meet the Marketing Department's needs and will be the default layout for all news.

1. From within the News site, click Settings > Site settings.

2. Click Look and Feel > Page layouts and site templates.
3. In the Page Layouts section, select Pages in this site can only use the following layouts.

4. Double-click each of the page layouts to remove them, leaving the (Article Page) Image on right page layout as the only page layout available.

5. In the New Page Default Settings section, select the (Article Page) Image on right layout as the default page layout.

6. Be sure to check the box that reads, Convert blank spaces in the page name to ‘-‘. This will use the ‘-‘ symbol to replace any spaces that are inadvertently added to a page file name.

7. Click OK.

Exercise 4: Configuring Image Renditions

The Marketing Department at Learning Lake wants to maintain consistency in the images size that are added to the page.

1. From within the Site Settings page of the News subsite, click Look and Feel > Image Renditions.
2. Click Add new item.

3. Type Display Template Picture Feature Image in the Name box.

4. Enter a Width of 250 and a Height of 200.

5. Click Save. You will use this template in the next exercise.

Exercise 5: Creating News Pages

Now that the News site is in place, the Marketing Department can start populating the News site with content.

1. From within the News site, click Settings > Add a page.
2. Type **Regional Sales Update** as the name of the page and click **Create**.

3. If you receive a prompt, **Do you want AutoComplete to**, click **No**.

4. In the **Article Date** box, type today's date.

5. In the **Byline**, type **Information on Quarter Sales Against Projected Goals**.

6. In the **Page Image** placeholder, click the link **Click here to insert a picture from SharePoint**.

7. Click **Browse** in the **Selected Image** field.

8. Click **Site Collection Images**.

9. The photo you want is not in SharePoint. Select **Click to add new item** to upload your photograph first.

10. Click **Choose File** (or **Browse**, depending on the browser).

11. Navigate to \C:\Labfiles\Media and select **CorporateHero.jpg**.

12. Click **Open**.

13. Click **OK** then click **Edit > Commit > Save** on the ribbon to upload the file.

14. Double-click the newly uploaded photo to insert it.

15. From the **Image Rendition** drop-down menu, select **Display Template Picture Feature Image (250 x 200)**.
16. In the **Alternate Text** box, type **Corporate Hero**. By doing this, you add a tool tip that is seen when the mouse is hovering over the image on the published page.

17. Click **OK** to insert the picture. (This may take a moment to show the picture.)

18. Click in the **Image Caption** placeholder and type **First Quarter Regional Sales Increase**.

19. Click in the **Page Content** region and type the following sample paragraph:

   *Learning Lake’s regional sales numbers have increased 30% over the projected amount. Because of everyone’s hard work, Learning Lake is honoring its promise to take all employees on a company-paid cruise. Look for additional information in the next few weeks regarding travel details.*

20. At the bottom of the page, in the **Rollup Image** placeholder, click the link **Click here to insert a picture from SharePoint**.

21. In the **Selected Image** field, click **Browse**.

22. Click **Site Collection Images**.

23. Double-click the **CorporateHero** photo.

24. From the **Image Rendition** drop-down menu, select the **Display Template Picture 3 Lines (100 x 100)**.
25. In the **Alternate Text** box, type **Corporate Hero**.

26. Click **OK** to insert the picture.

27. On the ribbon, click **Publish > Publish** in the **Publishing** section to save and publish the page.

28. On the pop-up window, type the following comment: **Added pictures and text to new site**.

29. Click **Continue**.

**Lab 2: Configuring a Publishing Approval Process**

The Marketing Department still would like to maintain control over reviewing and approving news items prior to them being published for the rest of the company to view. As a site owner, you must set up a publishing approval workflow on the News site, so the Marketing Department can review and approve all news items.

After completing this lab, you will be able to:

- Add an approval process to your publishing site

Estimated time to complete this lab: 30 minutes

**Exercise 1: Adding a Publishing Approval Workflow**

1. Navigate to the **News** site.

2. From within the **News** site, click **Settings > Site contents**.

3. Click the **Pages** library.
4. In the **Pages** library, on the ribbon, click **Library**. Click the Workflow Settings icon from the **Settings** group and select **Add a Workflow**.

5. In the **Workflow** section, under **Select a workflow template**, select the **Publishing Approval** workflow.

6. In the **Enter a unique name for this workflow** box, type **News Approval**.

7. In the **Task List** section, keep the default value under the **Select a task list**.

8. In the **History List** section, keep the default value under the **Select a history list**.

9. In the **Start Options** section, click the checkbox **Start this workflow to approve publishing a major version of an item**.

10. Click **OK** to turn on content approval.
11. Click Next.

12. In the **Assigned To** box, click the browse icon to the right.

13. In the **Find** box, type **Owners** and press [Enter].

14. Double-click **Learning Lake Intranet Owners** and click **OK**.

15. In the **Order** drop-down, select **All at once (parallel)** as the workflow path.

16. Because a group is selected for approvers, clear the checkbox **For each group entered, assign a task to every individual member and to each group that it contains**. By clearing this, only one task is created for the group and any person in that group can claim the task and complete it.

17. In the **Request** box, type **Please review the page and approve it for publishing**.

18. Type the number 3 in the **Duration Per Task** box.

19. Keep the **Duration Units** set to **Day(s)**.

20. Select the checkbox **Automatically reject the document if it is rejected by any participant**. This is important, so that the workflow does not continue to be assigned to the rest of the individuals listed in the **Assigned To** box upon one person’s rejection.
21. Select the checkbox **Automatically reject the document if it is changed before the workflow is completed.** This is important, so that the workflow ends if any changes are made to the document before the workflow is completed.

22. Select the checkbox **Update the approval status after the workflow is completed (use this workflow to control content approval).** This will mark the content as approved and published.

23. Click **Save.**

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**Exercise 2: Testing the Workflow**

1. From within the **News** site, click **Settings > Add a page.**
2. Type **Upcoming Open Enrollment** as the page name and click **Create.**
3. In the **Article Date** field, type today's date.
4. In the **Byline** field, type **Don't forget to review your benefit elections.**
5. In the **Page Image** placeholder, click the link **Click here to insert a picture from SharePoint.**
6. Click **Browse.**
7. Click **Site Collection Images.**
8. Double-click **Open Enrollment.**
9. Select the **Display Template Picture Feature Image (250 x 200)** from the **Image Rendition** drop-down menu.
10. In the **Alternate Text** box, type **Open Enrollment Picture.**
11. Click **OK.**
12. Click the **Image Caption** placeholder and type *Annual Open Enrollment Review Period*.

13. Click the **Page Content** region and enter the following notice:

   *September is open enrollment month. Be sure to get your forms turned in by September 30. If you have any questions, please contact Human Resources for assistance.*

14. At the bottom of the page in the **Rollup Image** placeholder, click the link **Click here to insert a picture from SharePoint**.

15. In the **Selected Image** field, click **Browse**.

16. Click **Site Collection Images**.

17. Double-click the **Open Enrollment** photo.

18. From the **Image Rendition** drop-down menu, select the **Display Template Picture 3 Lines (100 x 100)**.

![Image Rendition Options]

19. In the **Alternate Text** box, type **Open Enrollment Picture** as the text. This will add a drop-down note when the mouse is placed over the image in the published page.

20. Click **OK** to insert the picture.

21. On the ribbon, click **Page > Save** in the **Edit** section to save the page. Notice the page is still checked out.

22. On the ribbon, click **Publish > Submit** in the **Publishing** section to start the Publishing Approval workflow.

23. In the **Submit for Approval** comments, type **Ready for review** and click **Continue**.

24. Review the workflow options. To start the workflow, click **Start**. (This may take a moment.)

25. Once the page has been submitted, notice that it is waiting for approval. Click **Settings > Site contents**.

26. Click **Workflow Tasks** to review the workflow tasks.

27. Notice the task has been assigned, but it has not been completed. Click the task.

28. Notice the options available. Click the **Approve** button to approve the submitted article.
29. In the Quick Launch, click **Upcoming Open Enrollment**. Notice that the article has been approved, and there is no highlighted bar asking for the page to be approved.

### Lab 3: Implementing a Managed Navigation Site

The Marketing Department does not like how the navigation appears within the **News** site, and is interested in organizing the navigation by a set of categories.

After completing this lab, you will be able to:

- Set up and use the Managed Metadata navigation

Estimated time to complete this lab: 40 minutes

**Exercise 1: Enabling the Managed Metadata Navigation**

1. Navigate to the **News** site.
2. From within the **News** site, click **Settings > Site settings**.
3. Click **Look and Feel > Navigation**.
4. The Managed Metadata navigation settings can be applied to both the global navigation and the current navigation. In the **Current Navigation** section, click **Managed Navigation**: The navigation items will be represented using a Managed Metadata term set.

5. In the **Managed Navigation: Term Set** section, click **Create Term Set**.

![Managed Navigation: Term Set](image1)

A new term set is created under the **Site Collection** group and is given the same name as the site.

![Managed Metadata Service](image2)

6. Scroll to the bottom and click **OK**.

Notice the left navigation has been updated to remove the structural navigation.

**Exercise 2: Creating Navigation Terms**

Now that the News site is configured to use the Managed Metadata navigation, the links to the existing pages have been removed. As a site owner, you need to build out the initial term set that will map the existing pages to a set of terms. The appearance of a hierarchy structure is based upon the structure of the terms within the sites navigational term set. This method gives site owners the ability to easily reorganize their site's structure by updating the order and sorting of terms within a term set.

1. Click **Settings > Site settings > Site Administration > Term store management**.
2. Click to expand the group **Site Collection – intranet.learninglake.com**.
3. Locate the **News Navigation** term set.
4. Right-click **News Navigation**.
5. Click **Create Term**.
6. Type **Benefits** and press [Enter].

7. Right-click **News Navigation** to create a second term at the same level.

8. Click **Create Term**.

9. Type **Sales** and press [Enter].

![Image of News Navigation terms]

10. Click **Benefits** and click the **Term-Driven Pages**.

11. Click the checkbox **Change target page for this term** under **Target Page Settings**.

12. Click **Browse** to locate the page.

![Image of selecting an asset]

13. In the **Select an Asset** window, navigate to **News > Pages** and click **Upcoming-Open-Enrollment.aspx**.

14. Click **Insert**.

15. Back on the **Term Store Management** page, click **Save**. (It is saved when the Save button is grayed-out.)

16. Click **Sales** and click the **Term-Driven Pages**.

17. Select **Change target page for this term**.

18. Click **Browse** to locate the page.

19. In the **Select an Asset** window, navigate to **News > Pages** and click **Regional-Sales-Updates.aspx**.

20. Click **Insert**.

21. Back on the **Term Store Management** page, click **Save**. (It is saved when the Save button is grayed-out.)

22. Navigate back to the Learning Lake **News** site from the global navigation link at the top of the page.

   Notice that **Benefits** and **Sales** appear in the left navigation and go to the proper page layouts.

**Exercise 3: Creating Additional News Pages**

https://skillpipe.com/#/reader/urn:uuid:9e691a33-42d3-4176-b322-412dee76a30f@2022-02-23T14:00:00Z/content
1. Navigate to the **News** site using the link at the top of the page.

2. Click **Settings > Add a page**.

3. Type **New Insurance Carriers** as the name for the new page. Notice the URL for the page appears in the **Add a page** box.

4. Click **Create**. Notice the newly created page is added to the left navigation at the same level as **Benefits** and **Sales**.

5. Continue authoring the content on the page.

6. On the ribbon, click **Publish > Submit** in the **Publishing** section to submit the page for approval.

7. Put in a comment in the **Submit for Approval** window.

8. Click **Continue**.

9. Click **Start** to trigger the workflow.

10. In the Quick Launch, click **New Insurance Carriers**.

    Notice the URL of the page is in a friendly format and does not contain additional text, such as `/pages/insurance-carriers.aspx`. 
Exercise 4: Controlling the Navigation and Page Structure

Having a site based on the Managed Metadata navigation means that all pages reside within a single pages library. The appearance of a hierarchy structure is based upon the structure of the terms within the sites navigational term set. The Marketing Department would like all of the pages related to the Benefits page to reside under the parent term.

1. Navigate to the News site.
2. From the News site, click Settings > Site settings.
3. Click Site Administration > Term store management.
5. Right-click New Insurance Carriers.
6. Select Move Term.
8. Click OK to move the term (New Insurance Carriers) under Benefits.
9. Click **Save**.

10. Navigate back to the **Learning Lake News** site.

Notice that **New Insurance Carriers** is now available and indented as a child page under **Benefits**.