

Edit pages in Omnia using Quick Edit

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Introduction

Purpose of this document: Training material for editing and publishing pages in Omnia, mainly for self training.

Target group: Intended for editors of publishing pages (not applicable for collaboration sites or the portal start page).

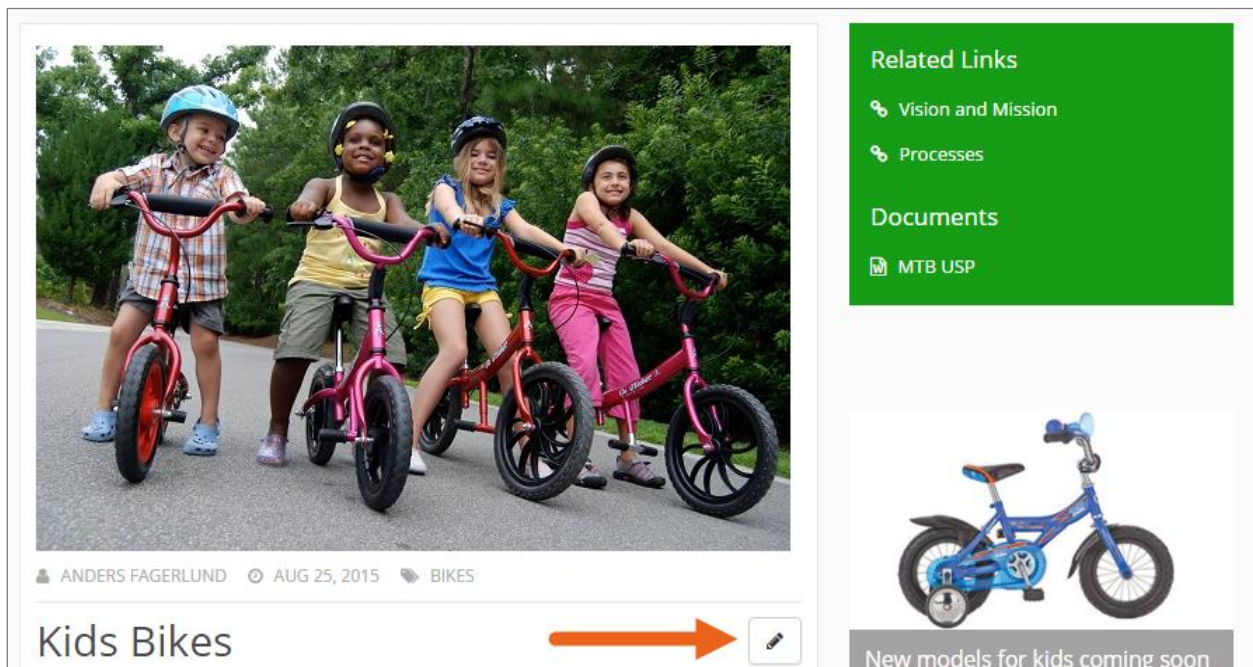
For instructions on how to create, move and delete pages, see the document *Creating, moving and deleting pages using Quick Edit*.

Note! This document explains how to edit the content of Quick pages. For instructions on how to edit the layout of a Quick Page, see *Working with Page Designer for Quick Pages*.

Edit a page

To edit a publishing page, do the following:

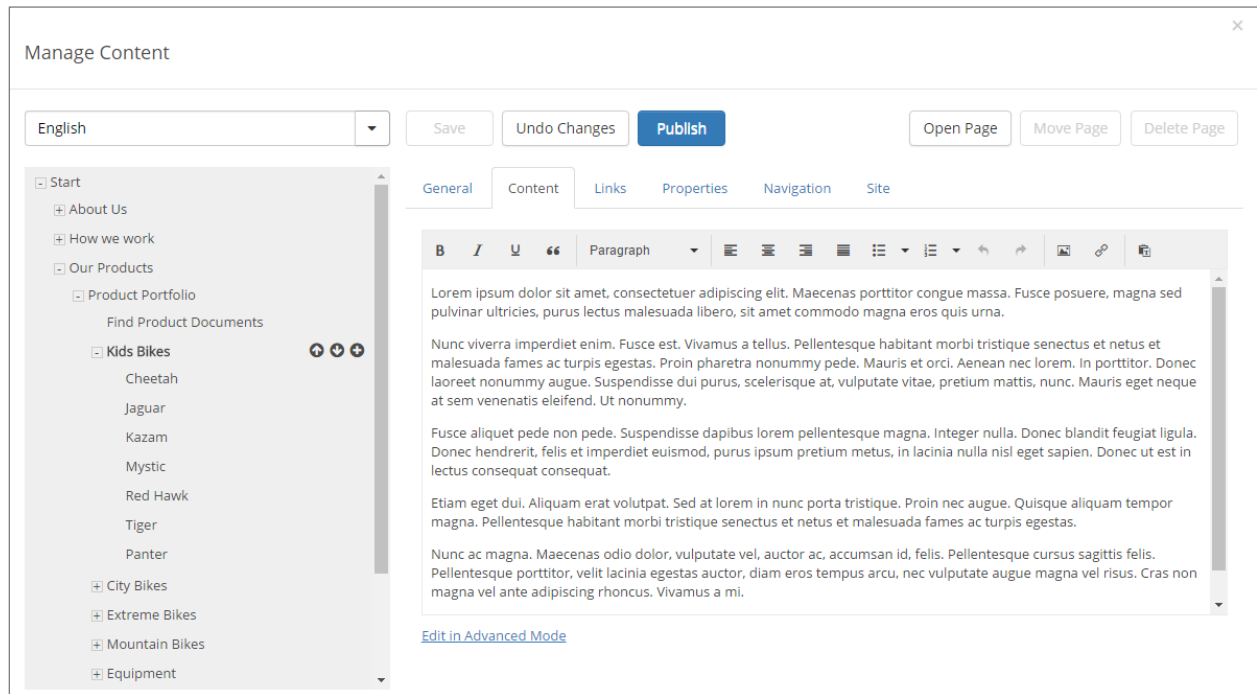
1. Go to the page you want to edit.
2. Click the **Quick Edit** icon.



The screenshot shows a web page titled "Kids Bikes" by Anders Fagerlund, dated August 25, 2015. The main image shows four children on bicycles. To the right is a green sidebar with "Related Links" (Vision and Mission, Processes) and "Documents" (MTB USP). Below the sidebar is a blue bicycle image with the text "New models for kids coming soon". An orange arrow points to a "Quick Edit" icon (a pencil in a circle) in the bottom right corner of the main content area.

If you don't see the Quick Edit icon, you don't have the permission needed to edit the page.

When Quick Edit starts, something like this is displayed:



You work with the content through the tabs. Don't miss the information on saving and publishing at the end of this document.

Note!

When Quick Edit is opened, the page is automatically checked out to you, meaning no other editor can edit the page until you either check in the page or publish.

An advice: always save when you're finished editing a tab.

The General Tab

The general tab has three fields:

The screenshot shows the 'General' tab of the 'Manage Content' interface. It has three main fields: 'Title' with the value 'Kids Bikes', 'Summary' with a text area containing Lorem Ipsum text, and 'Image' with a text field showing the path '/sites/vnext/SiteCollectionImages/Kids-bikes.jpg' and a 'Browse' button.

You use them the following way:

Title

You can change the title here. Normally the title for the page is the same as the title displayed in the navigation. If you want a different title in the navigation, see *Navigation Tab*, below.

Summary

Add text for the summary here. The summary is displayed under the title on the page.

Image

You can choose to place an image at the top of the page. The image will be placed over the page title.

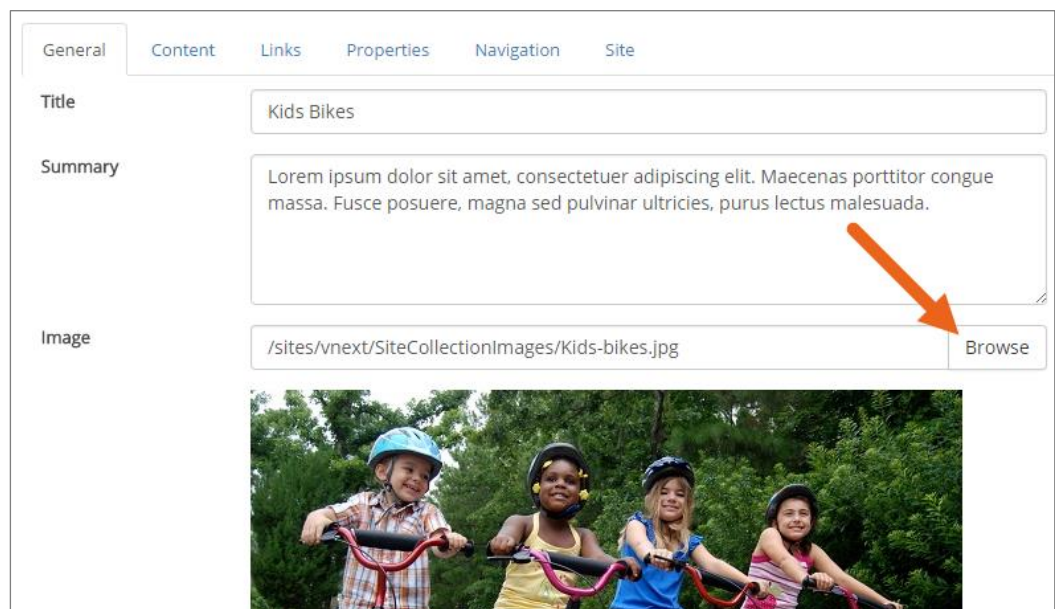
You can do that by either selecting an image that are stored somewhere in the portal (or upload the image you want to use), or by entering a Url (a web address) to an image stored or used somewhere else.

If you select an image that is stored in the portal, you can also choose an image rendering (we will soon see how that is done).

Selecting an image stored in the portal

Do the following:

1. Click **Browse**.

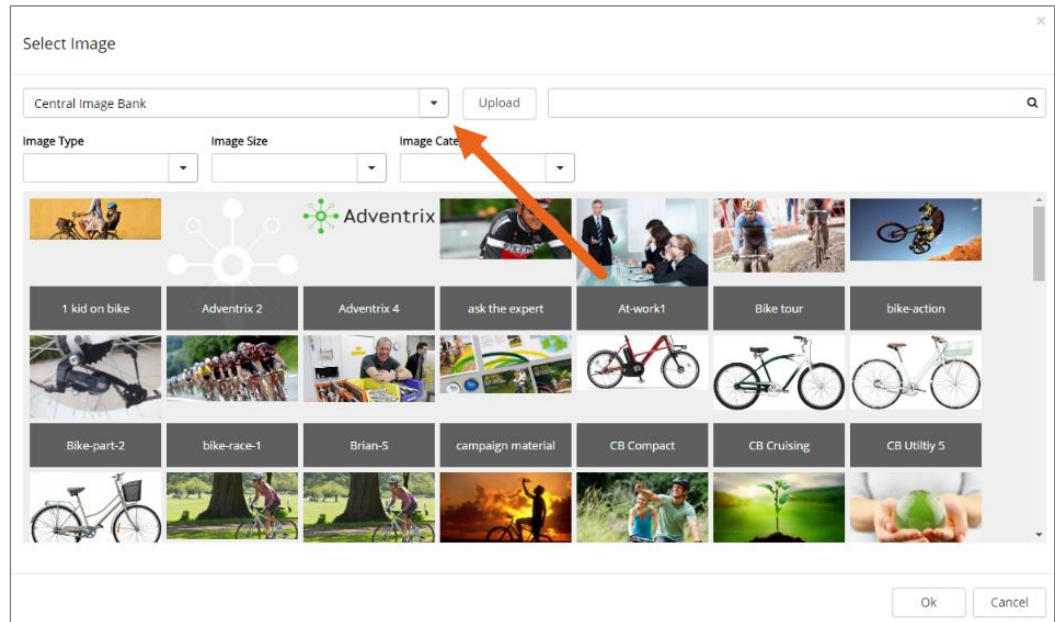


The screenshot shows a configuration interface with tabs: General, Content, Links, Properties, Navigation, and Site. The 'Content' tab is active. It contains three main sections: 'Title' with a text box containing 'Kids Bikes'; 'Summary' with a text box containing placeholder text 'Lorem ipsum dolor sit amet, consectetur adipiscing elit. Maecenas porttitor congue massa. Fusce posuere, magna sed pulvinar ultricies, purus lectus malesuada.'; and 'Image' with a text box containing the path '/sites/vnext/SiteCollectionImages/Kids-bikes.jpg' and a 'Browse' button. An orange arrow points to the 'Browse' button. Below the 'Image' section, there is a preview image of four children wearing helmets and riding bicycles.

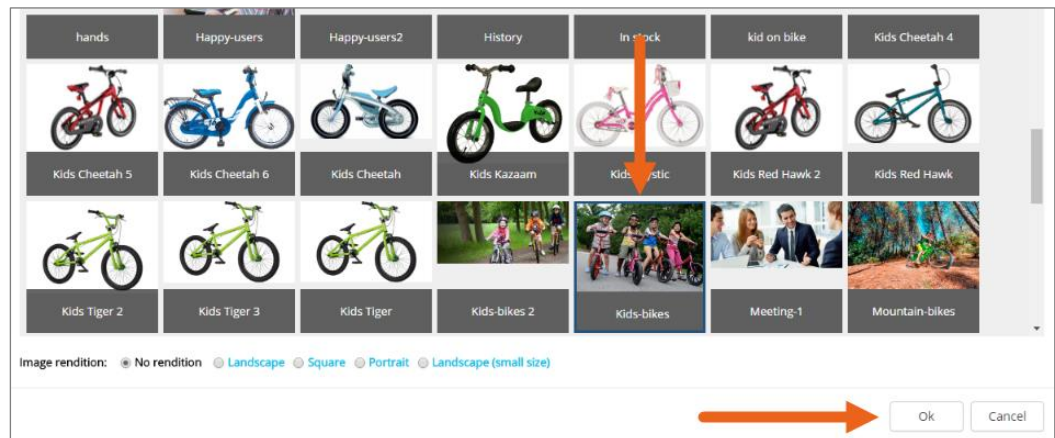
The Omnia Image picker opens. Use it this way:

2. Select image library in the top list.

Normally there will be one or several central image libraries, and one local, to choose from.



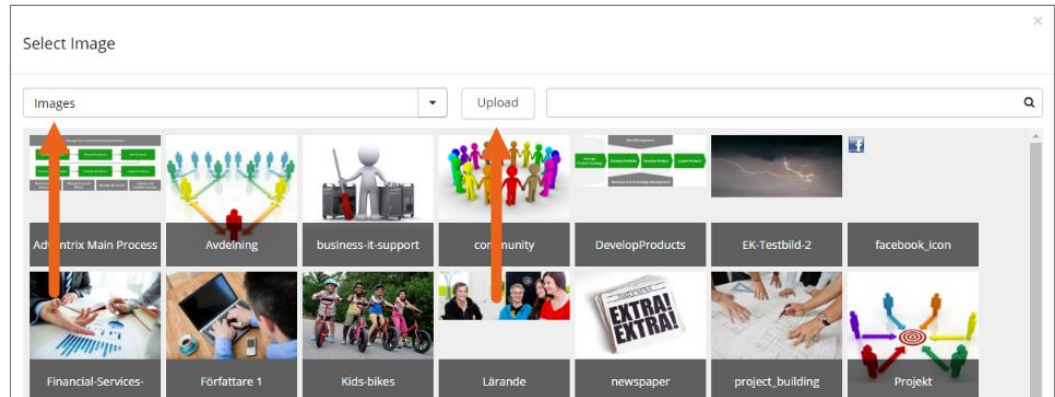
3. Find the image, select it, and click **OK**.



Upload an image

You can use an image from your computer, but you have to upload it first.

1. Select the local image library (normally you don't have permission to upload an image to any central image library).
2. Click **Upload**.



3. Find the image, select it, and click **OK**.

When the upload is finished, continue this way (the same way as above):

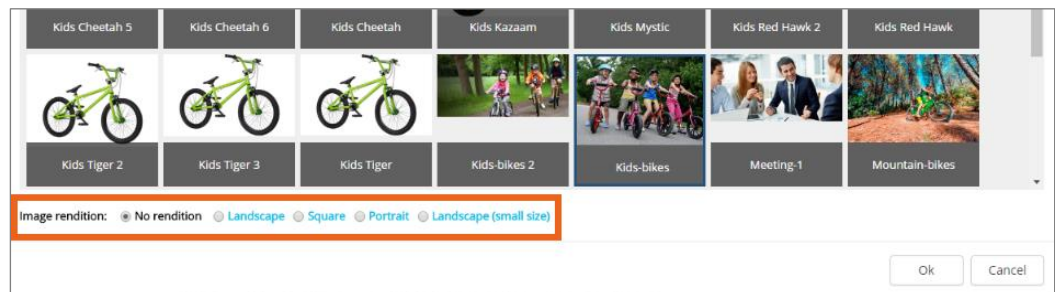
4. Select the image and click **OK**. (You can select image rendition, see below, but that is normally not needed for a landscape image.)

A preview of the image is shown so you can see that the image turned out as expected.

Image rendition (a bit technical)

Image rendition is a way of choosing different areas of an image for different purposes. Depending on settings for the portal, image rendition may not be activated for all image libraries, or you may not have the appropriate permissions.

If it's possible to select, or even change, image rendition for the selected image, something like the following is displayed at the bottom of the window:

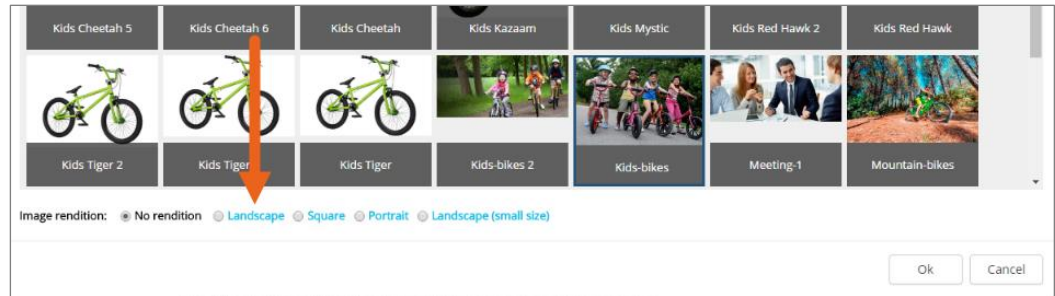


For a page image (displayed at the top of the page), **No rendition** or **Landscape** is normally the right choice. When you have selected rendition, keep an eye on the image. The preview of the image is shown with the selected rendition.

Edit a rendition

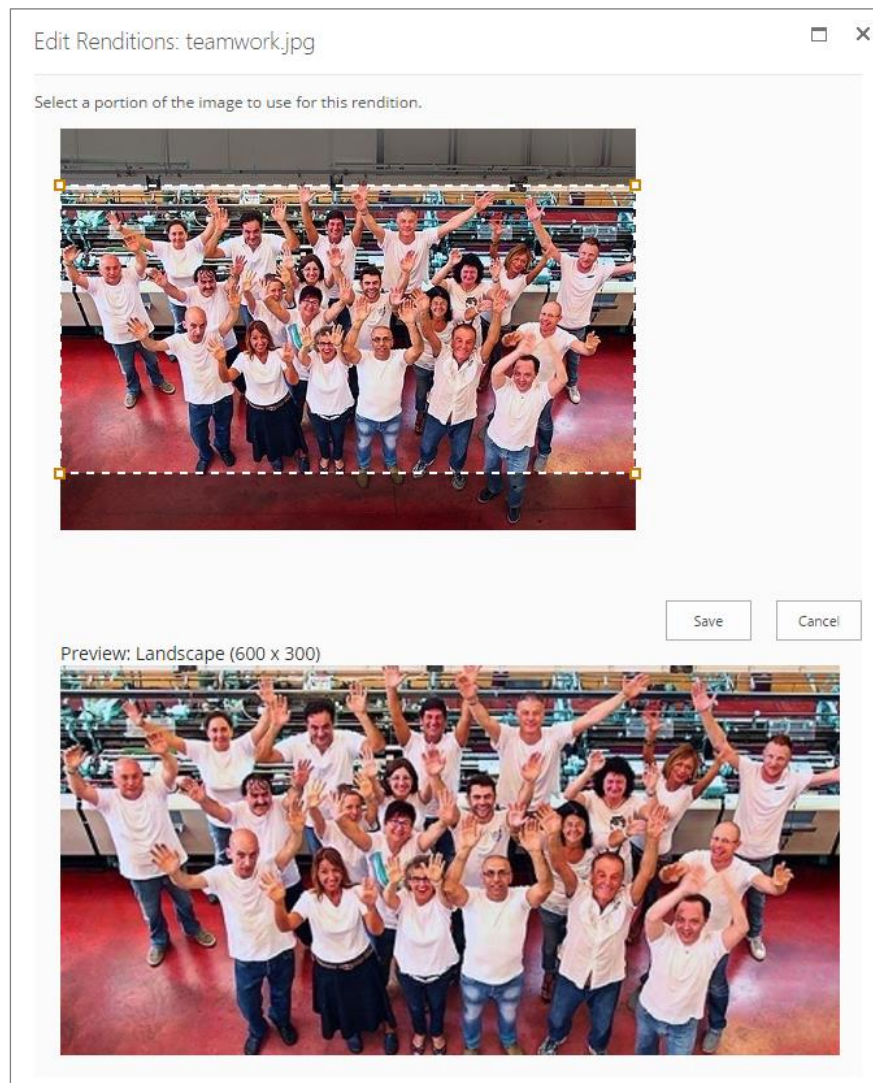
If you have appropriate permissions for the image library (and image rendition is activated there), you can select which part of the image that should be shown.

1. Click the link for the rendition:



(If the link is not clickable you most likely don't have the permission to change image rendition in the library.)

2. Move the dotted area at the top, or even change the size of the area (you can't change width/Height proportions) to select another part of the image.



3. Click **Save**.
4. Click **OK** in the next window, to go back to the image picker.

Important note!

There can be only one setting for each rendition for a physical image, so if several editors use the same image library, you have to decide on one setting to use. If one editor changes the rendition settings, it's implemented everywhere this rendition for that image is used. This is true for an image library, or for each folder, if folders are used in the library.

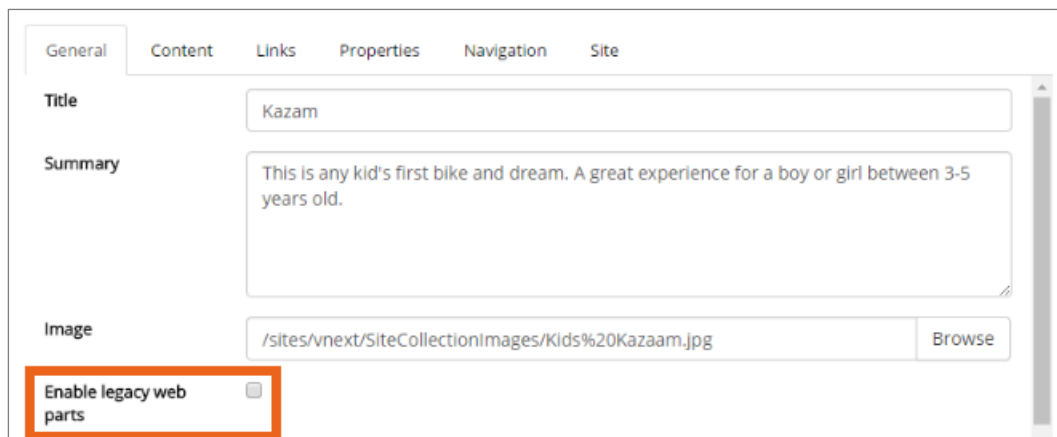
Url to an image

If you want to use an image that is stored somewhere else (not in the portal), you can add the Url in the field. The Url must start with either `http://` or `https://`. You can type the Url or copy and paste it.

Note that permissions apply here as well. Users of the portal must have at least View permission to the place where the linked image is stored, or they will not see the image.

Enable legacy web parts

If Quick Pages is activated, this check box is displayed:



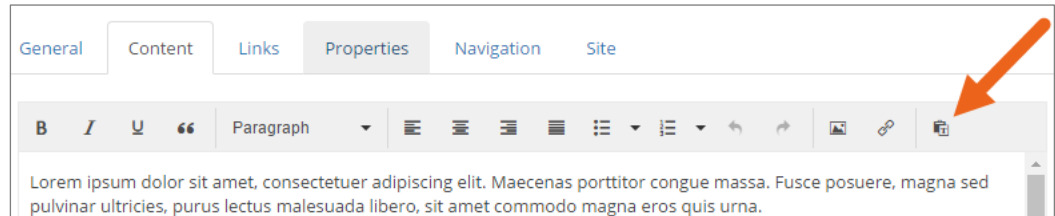
The screenshot shows a web page editor interface with several tabs: General, Content, Links, Properties, Navigation, and Site. The 'General' tab is active. It contains fields for 'Title' (Kazam), 'Summary' (This is any kid's first bike and dream. A great experience for a boy or girl between 3-5 years old.), and 'Image' (/sites/vnext/SiteCollectionImages/Kids%20Kazaam.jpg). A 'Browse' button is next to the image field. At the bottom, there is a checkbox labeled 'Enable legacy web parts' which is checked and highlighted with a red rectangle.

Quick Pages loads much, much faster, but legacy web parts can't be used on such pages. An administrator activates Quick Pages for the whole web site, and it's then up to you, and other editors, to set this for each page. The check box can be checked, or not checked as the default setting.

If you are about to add a banner or a quick poll to a page, you must see to that this check box is checked.

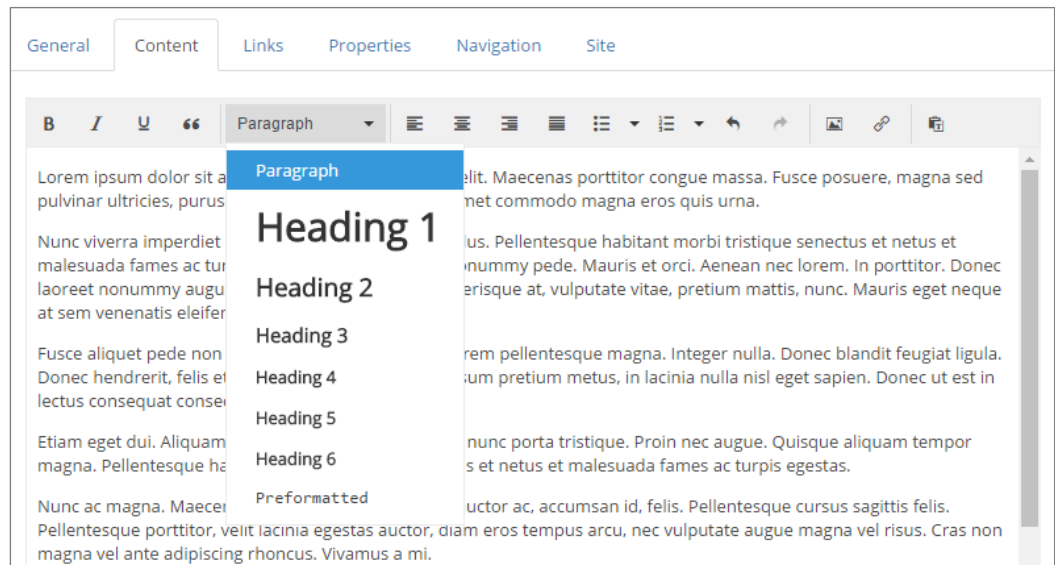
The Content Tab

Here you can type or paste text. If you paste text you very often paste the formatting for the text as well. If you don't want that, use the button **Paste as text**, to paste text you have copied from another source (for example a Word document).

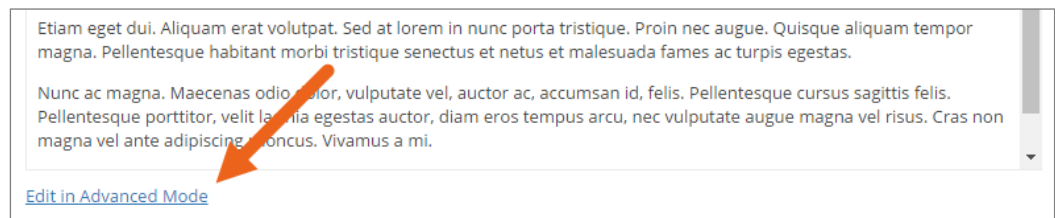


You can edit the text using the options here. They are quite simple, you will easily see what they do. Also: the normal Windows commands for cut, copy, paste and Undo works here as well.

Note the ready to use paragraph formats:



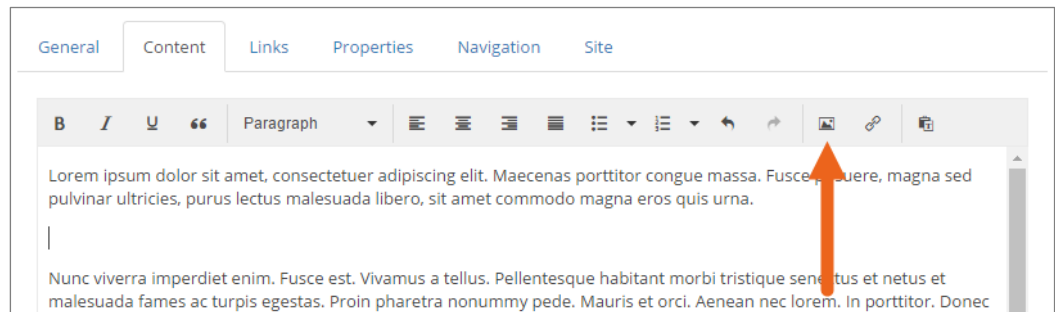
Edit in Advanced mode closes the Quick Edit and opens Sharepoint content editing, which is out of scope for this document.



Insert an image

You can insert images in the content. Here's how:

1. Click where you want the image inserted.
2. Click the Image button.



3. Use the image picker to select image (see above).

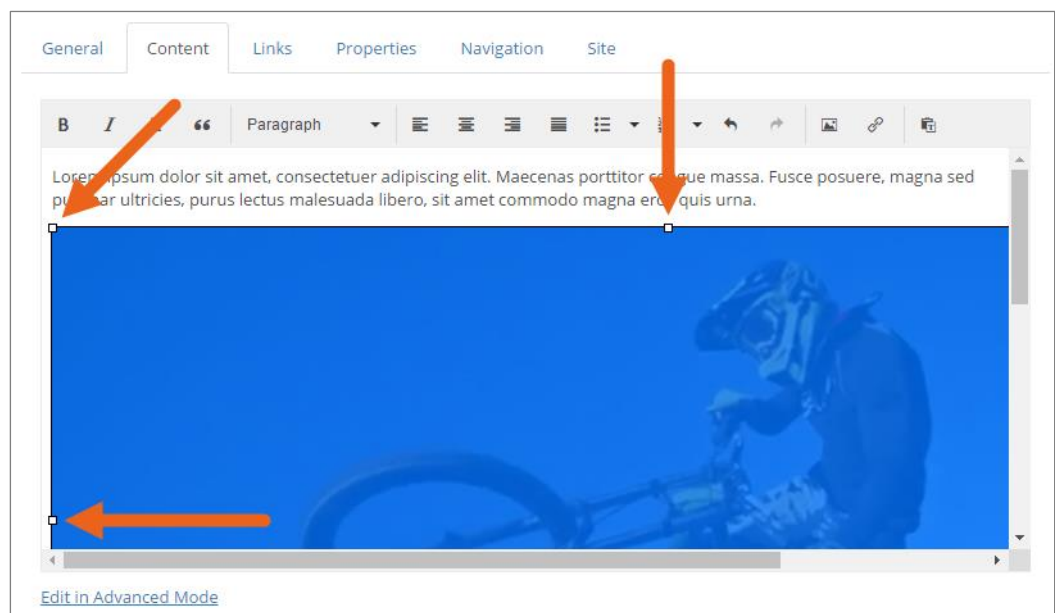
Note!

All users of the portal must have at least View permission to the image library. Otherwise they won't see the image. Image libraries in the publishing portal is normally not a problem, but you should probably not use an image library in a collaboration site, for example.

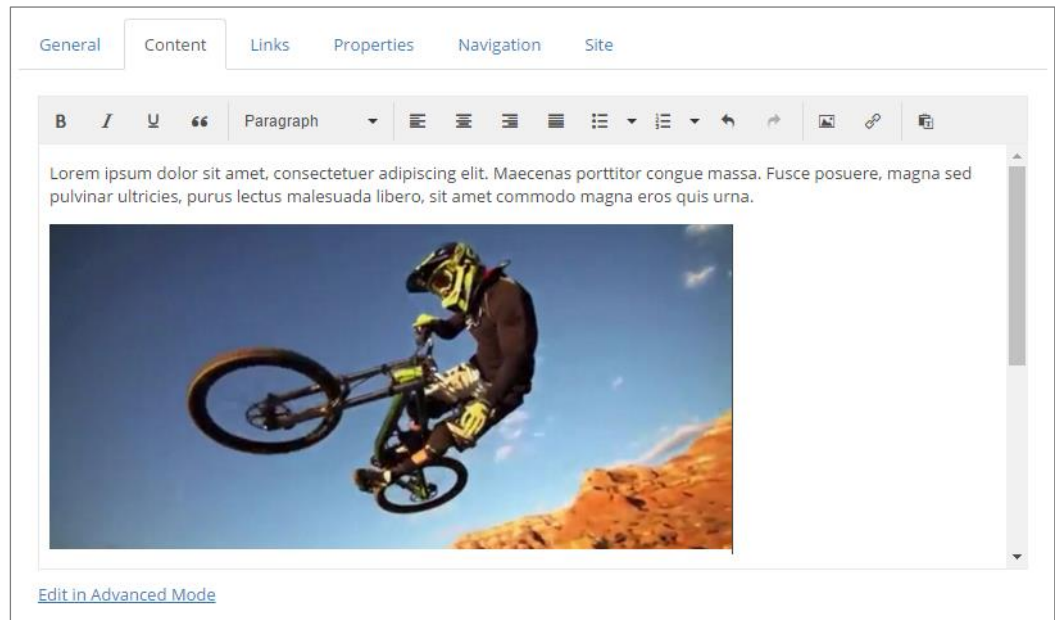
4. You can move the image using drag and drop, if needed.

If the image is too big, you change the size this way:

1. Click to select the image.
2. Grab any of the square "handles" and simply drag to the size you want.



The result could be something like this:

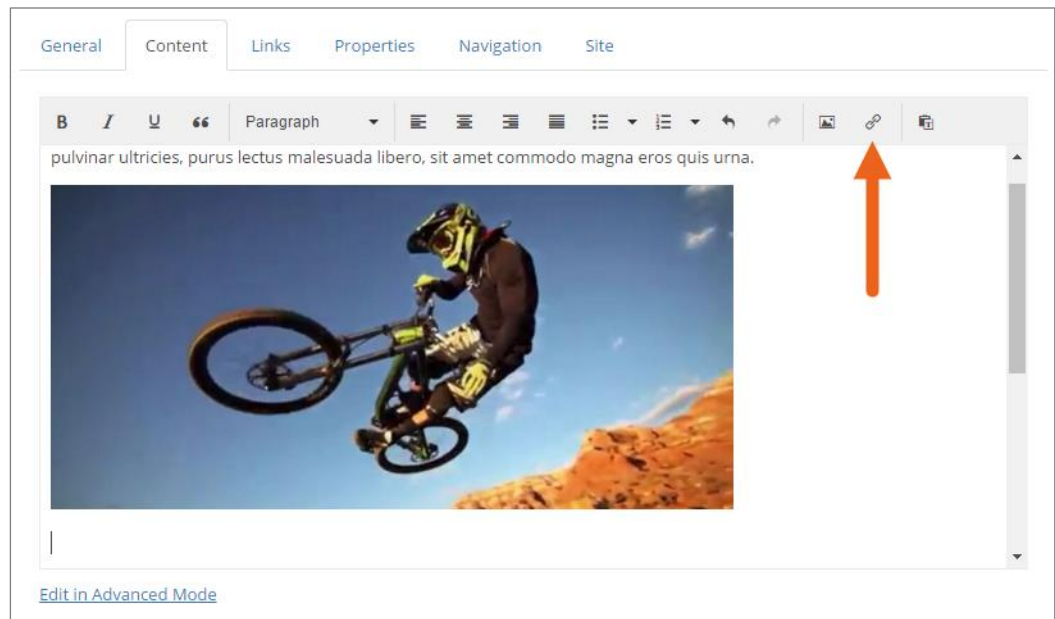


Insert a link

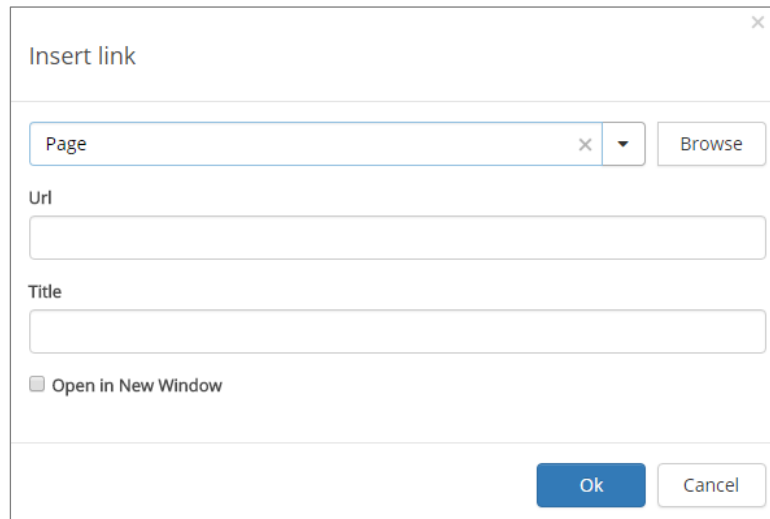
You can insert a link in the content but the recommendation is that, before you do, you have a closer look at what you can do on the Links tab.

To insert a link in the content, do the following:

1. Click where you want the link inserted.
2. Click the Links button.



The following is shown:

A dialog box titled "Insert link" with a close button (X) in the top right corner. It contains a dropdown menu with "Page" selected, a "Browse" button, a "Url" text field, a "Title" text field, a checkbox labeled "Open in New Window", and "Ok" and "Cancel" buttons at the bottom right.

Insert link

Page x ▾ Browse

Url

Title

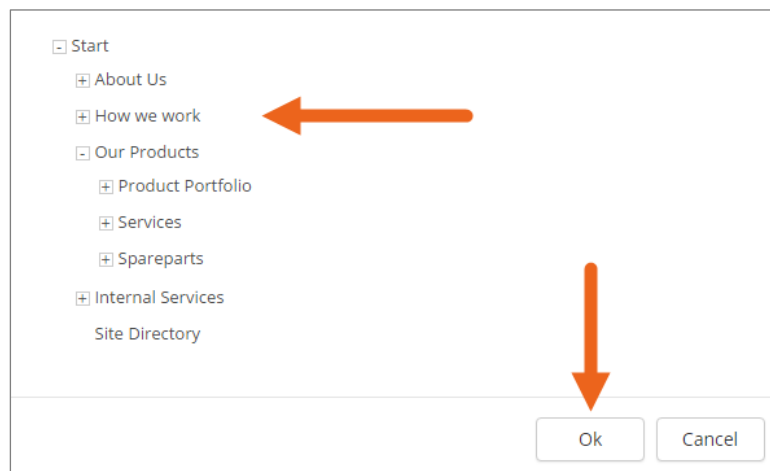
☐ Open in New Window

Ok Cancel

3. Select to link to a page or a document.
4. If you plan to link to a page or document inside the portal, click **Browse**.

If you have selected **Page**, do the following:

1. Use the navigation to find the page, select it and click **OK**.

A screenshot of a navigation pane. It shows a tree structure with "Start" expanded, containing "About Us", "How we work", "Our Products" (expanded), "Product Portfolio", "Services", "Spareparts", "Internal Services", and "Site Directory". An orange arrow points to "How we work". Another orange arrow points to the "Ok" button at the bottom right.

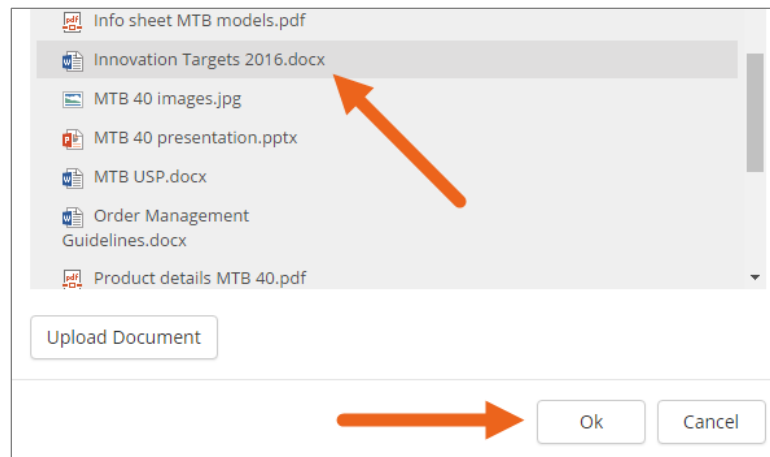
Start

- ⊕ About Us
- ⊕ How we work
- ⊖ Our Products
 - ⊕ Product Portfolio
 - ⊕ Services
 - ⊕ Spareparts
- ⊕ Internal Services
- Site Directory

Ok Cancel

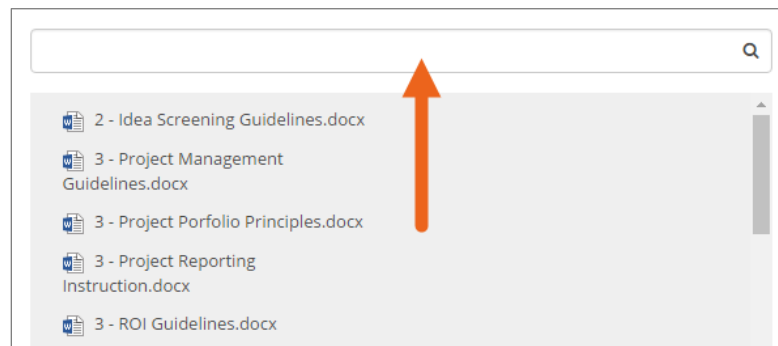
If you have selected **Document**, a list of all documents you have permission to see in the *Documents library* in the current site, is displayed.

2. Select the document and click **OK**.

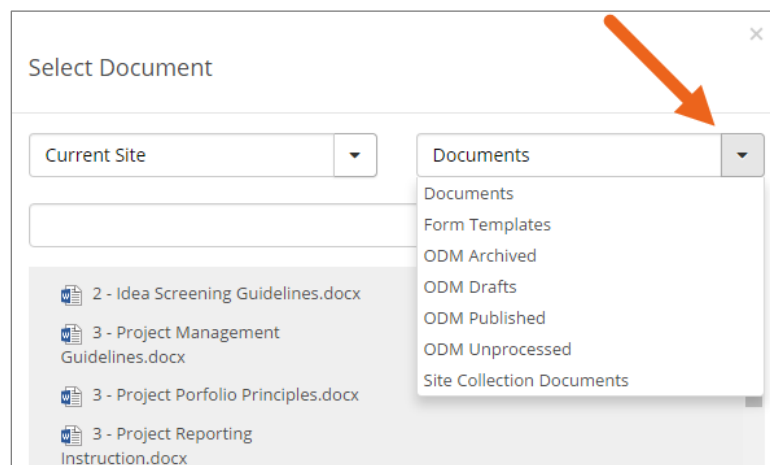


Find or upload the document

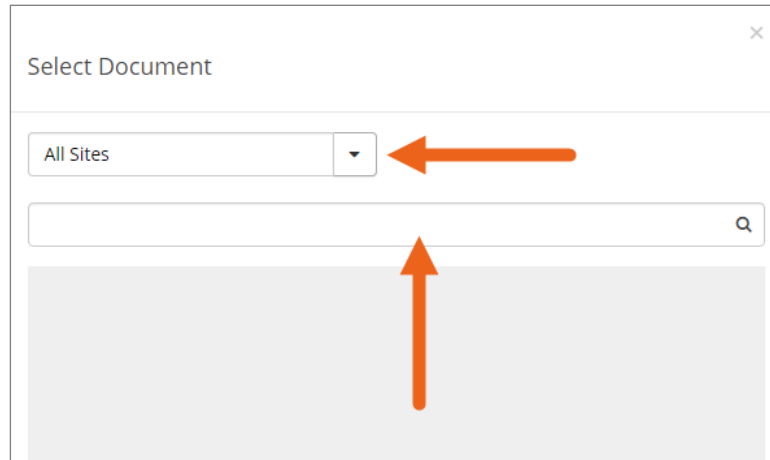
1. If the list of documents is very long, you can search for the document.



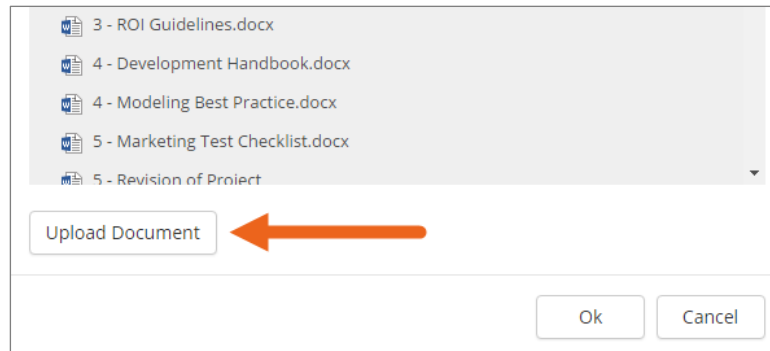
2. If the document you want to link to is in another library in the current site, select library.



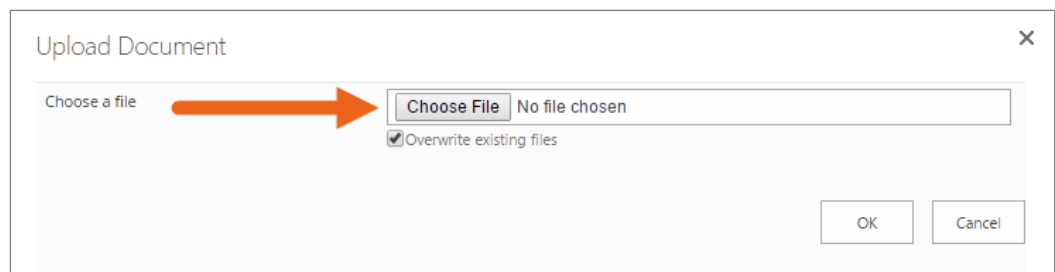
3. If the document is in another site, select **All sites** and search for the document.



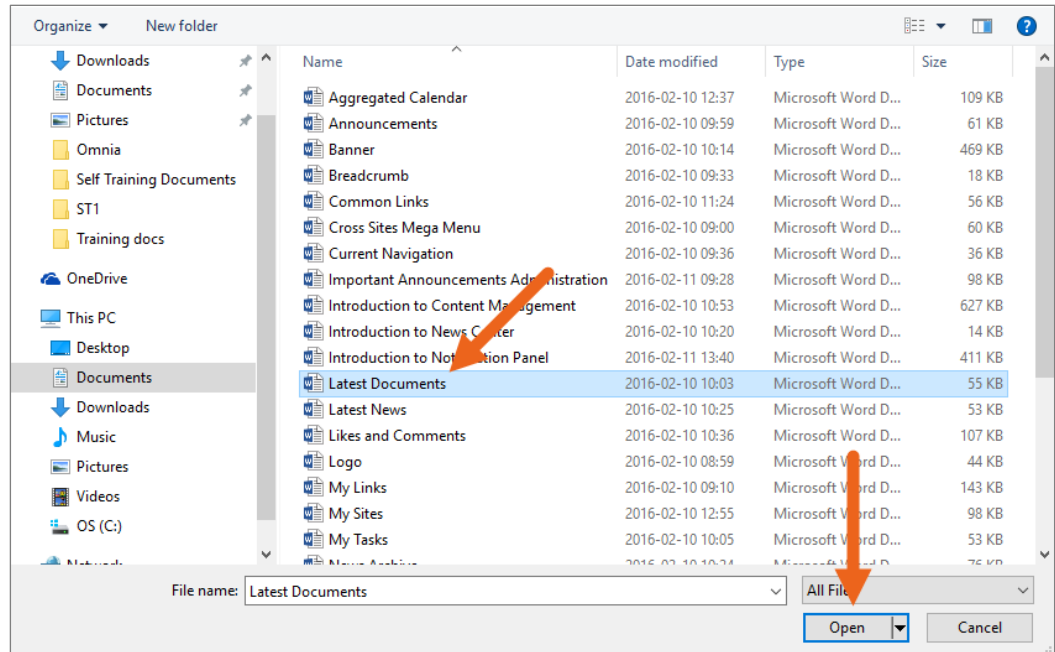
4. If the document still hasn't been uploaded to the site, click **Upload document**.



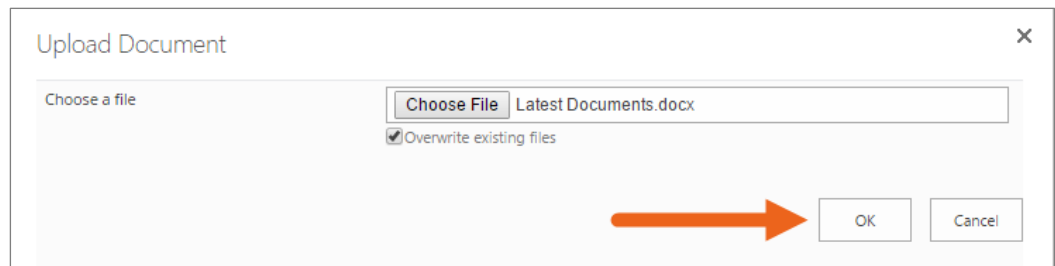
5. Click **Choose File**.



6. Find the document, select it, and then click **Open**.



7. Click **OK** here to start the upload:



When the upload is finished, you will find the document in the list of documents for the current site, and can select it there.

Note!

The document is uploaded to the **Documents** library in the current site.

8. When you see the document you want to link to in the list of documents, select it and click **OK**.

Note!

All users of the portal must have at least View permission to the document (it's normally set on the site or the document library). Otherwise they won't see and can't open the document.

Url to a page or a document

An alternative is to enter a Url to the page or document.

1. Type the link in the Url field or copy and paste it.

Note!

If it's an external link, it must always begin with `http://` or `https://`. Also note that all users, or the intended target group, must have access to the source you link to (it's not enough that you have access), or it will not work.

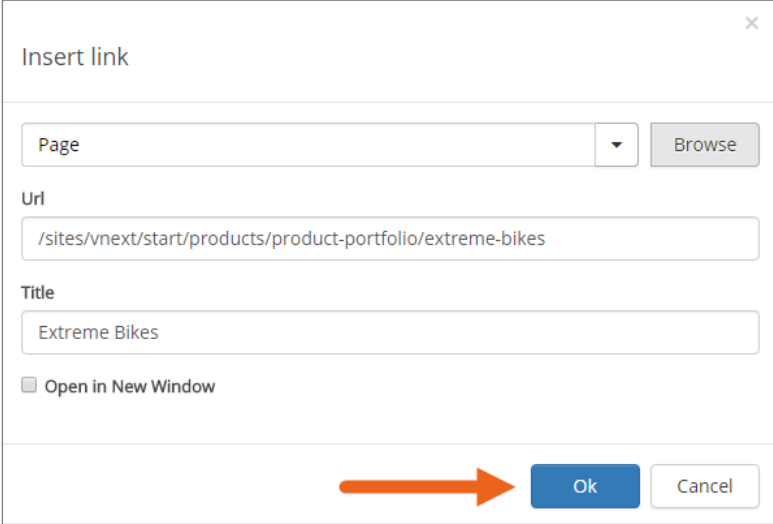
Title for the link and save

When all other settings for the link is done, do the following:

1. Add a title (the clickable text for the link).

You could also start by typing the text for the link in the content, and select that text. In that case, what you have selected is displayed in the **Title** field.

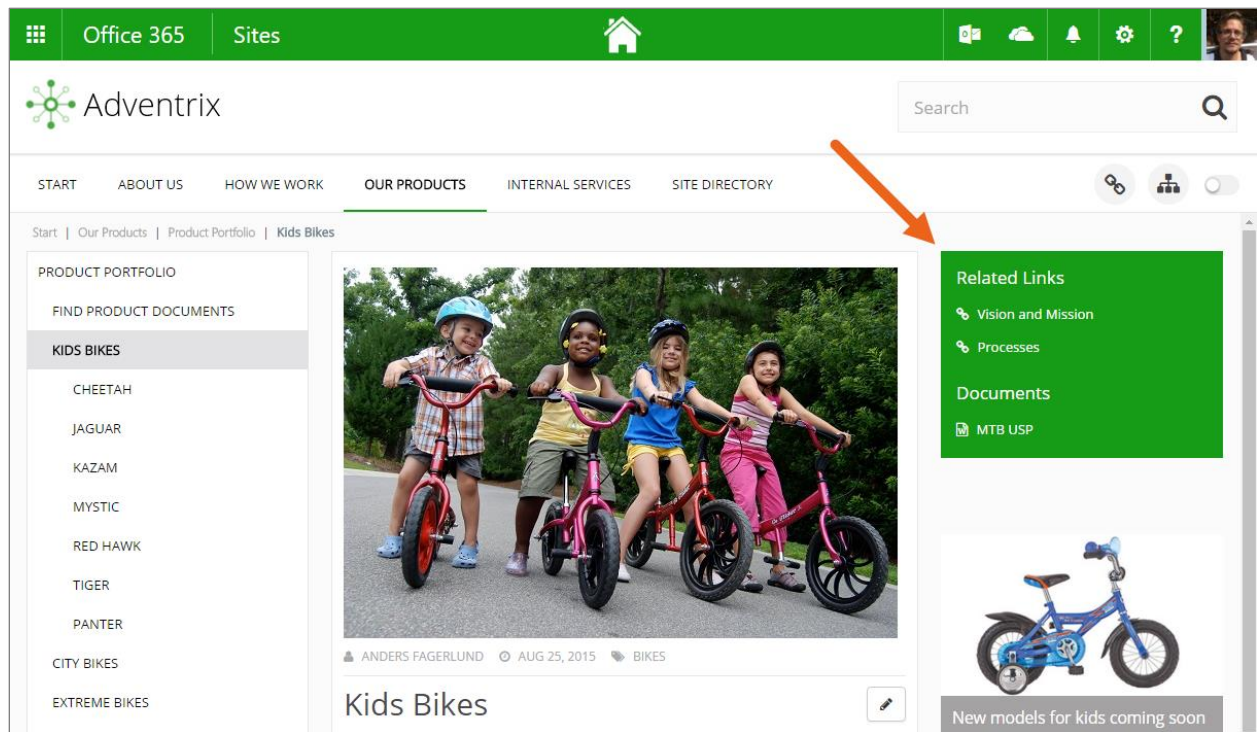
2. If you want the link to be opened in a new window (which is normally a good idea for external links and links to documents), select **Open in New Window**.
3. Click **OK** to create the link.



The Links Tab

It's most often better to have all links for a page in one list. You use the links tab for that purpose. You can create links to pages, documents, and to anything else you can reach through a link. You can add headings to group links, which is very useful if the list is long.

The links list you create here is normally placed in a fixed position at the top right of the page. Here's an example:



(In a custom page layout, or if you use advanced mode, the links list can be placed almost anywhere on the page).

If you have added links to the content, you will see that it works very similar here.

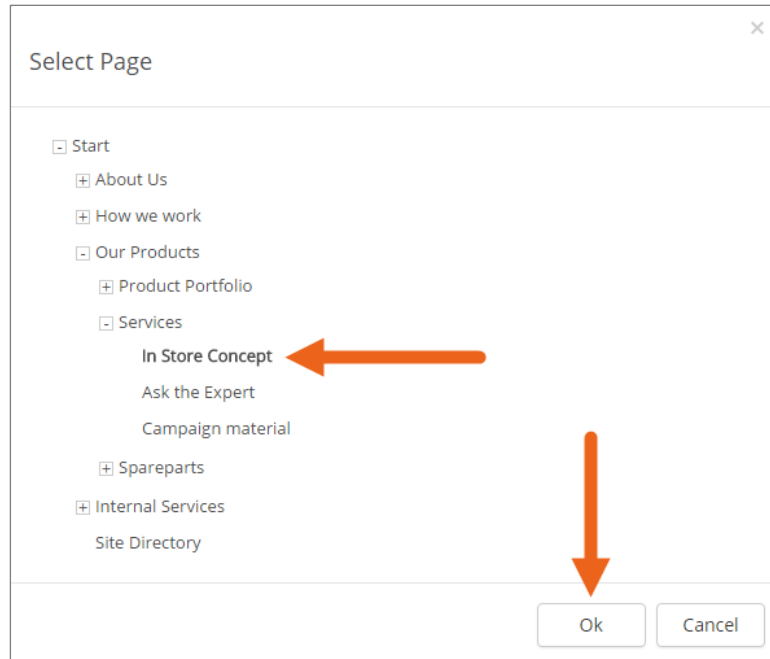
Linking to a page

Follow these steps to add a link to a page in the portal:

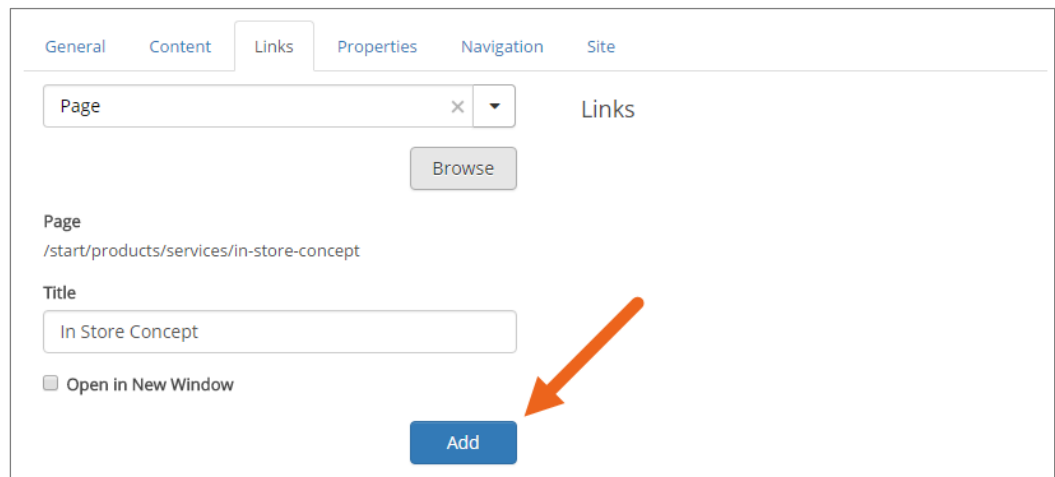
1. Select **Page** and click **Browse**.

The screenshot shows the 'Links' tab in the portal interface. It has a tab bar with 'General', 'Content', 'Links' (selected), 'Properties', 'Navigation', and 'Site'. Below the tabs is a form with a dropdown menu labeled 'Page' and a 'Browse' button. An orange arrow points to the 'Browse' button.

2. Use the navigation to find the page, select it and click **OK**.



3. Change the title (the clickable text for the link) if needed.
4. If you want the link to be opened in a new window, select **Open in New Window**.
5. Click **Add** to create the link.



The new link is now placed in the list to the right, for example:

General Content **Links** Properties Navigation Site

Page ▼

Browse

Page
/start/products/services/in-store-concept

Title
In Store Concept

☐ Open in New Window

Save

Links

Related Links

In Store Concept

Linking to a document

Follow these steps to add a link to a page in the portal:

1. Select **Document** and click **Browse**.

A list of all documents you have permission to see in the current site, is displayed.

If the list of documents is very long, you can search for the document.

Select Document ×

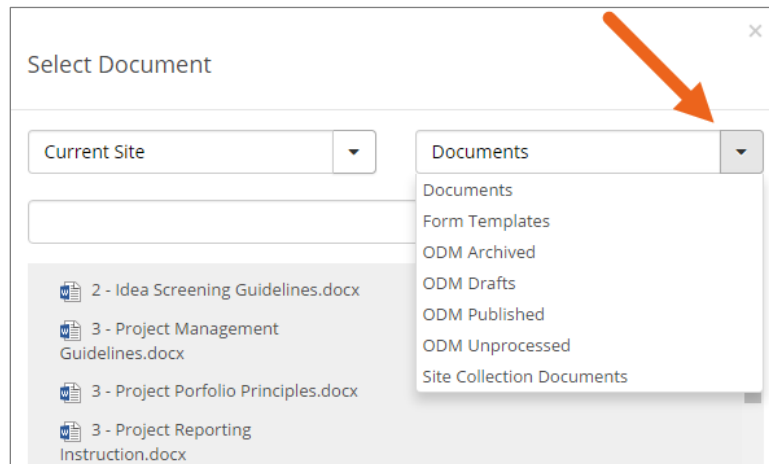
Current Site ▼ Documents ▼

- 2 - Idea Screening Guidelines.docx
- 3 - Project Management Guidelines.docx
- 3 - Project Portfolio Principles.docx
- 3 - Project Reporting Instruction.docx
- 3 - ROI Guidelines.docx
- 4 - Development Handbook.docx
- 4 - Modeling Best Practice.docx
- 5 - Marketing Test Checklist.docx
- 5 - Revision of Project

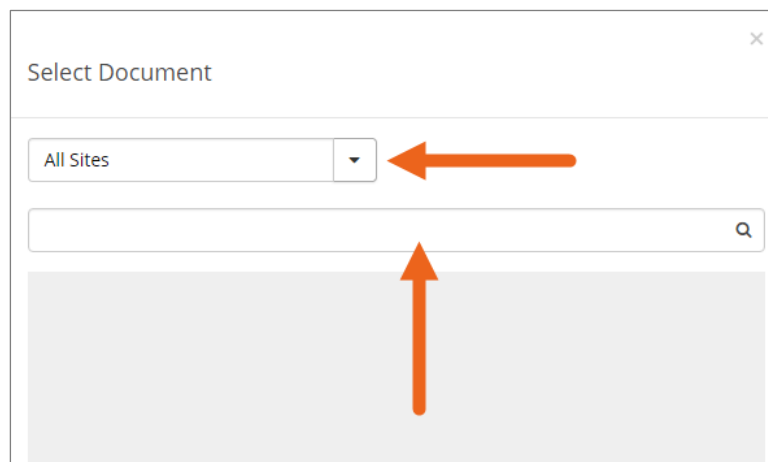
Upload Document

Ok Cancel

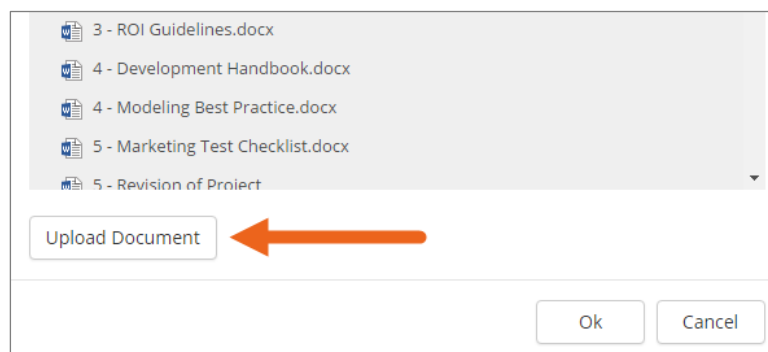
1. If the document you want to link to is in another library in the current site, select library.



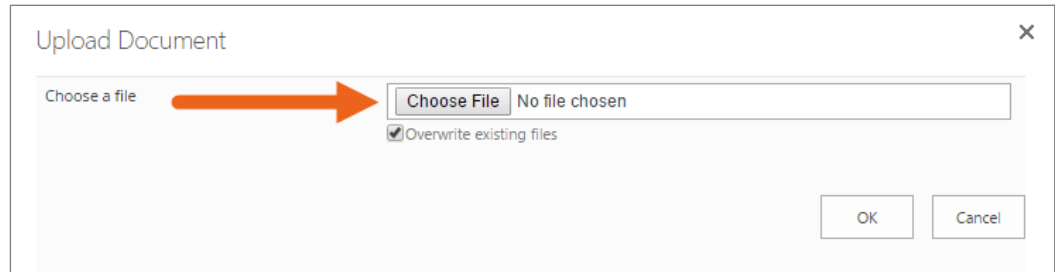
2. If the document is in another site, select **All sites** and search for the document.



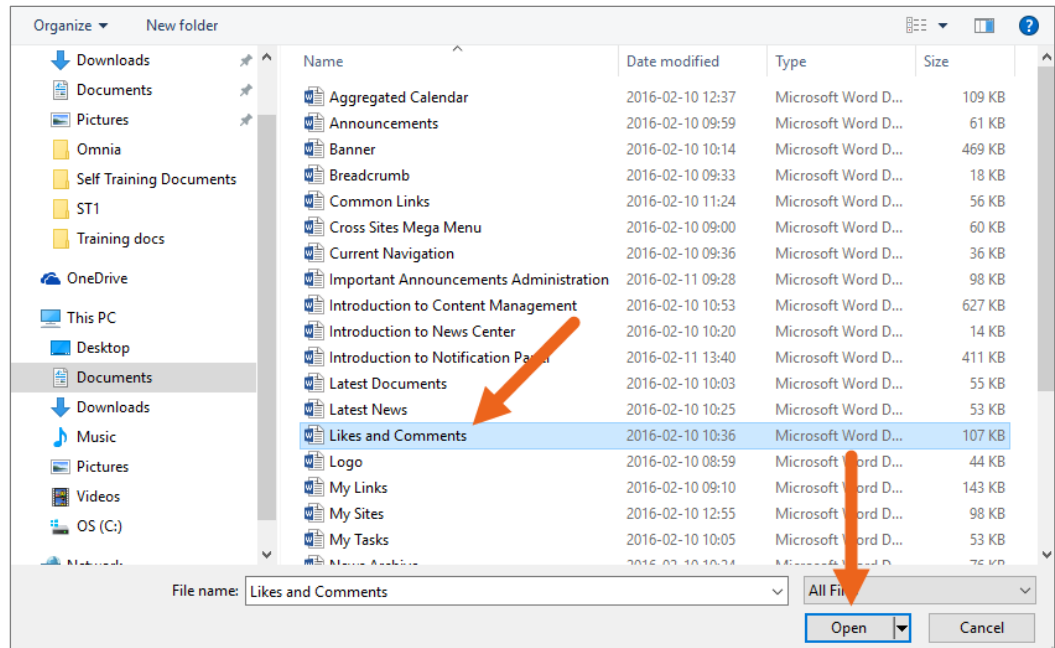
3. If the document still hasn't been uploaded to the site, click **Upload document**.



4. Click **Choose File**.



5. Find the document, select it, and then click **Open**.



6. Click **OK** here to start the upload:

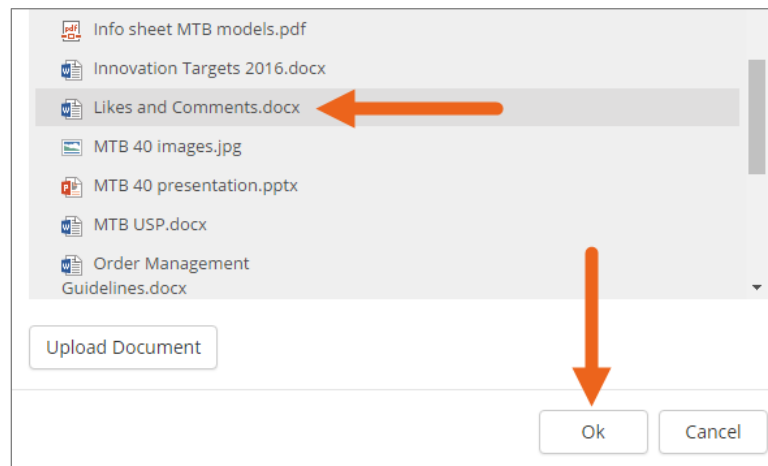


When the upload is finished, you will find the document in the list of documents for the current site, and can select it there.

Note!

The document is uploaded to the **Documents** library in the current site.

7. When you see the document you want to link in the list of documents, select it and click **OK**.

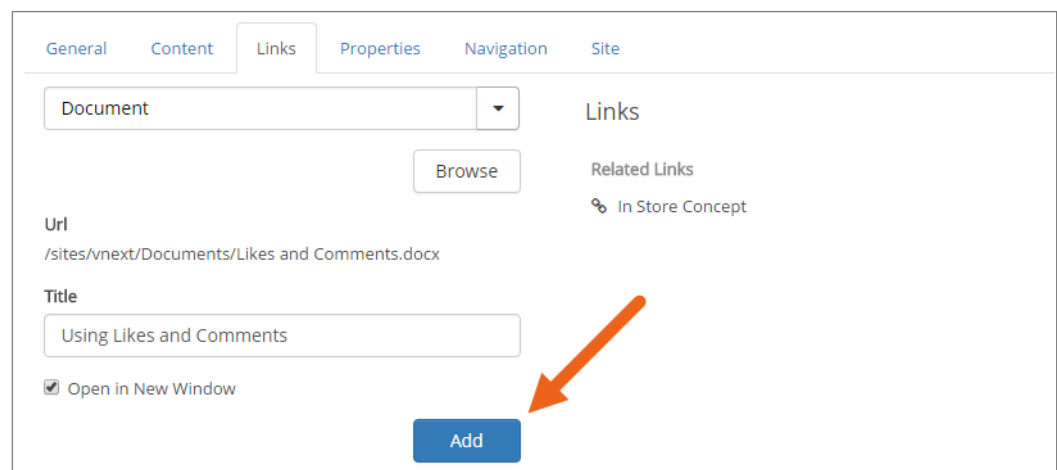


Note!

All users of the portal, or the intended audience for the document, if not all, must have at least View permission to the document (it's normally set on the site or the document library). Otherwise they won't see and can't open the document.

When the upload is finished, you will find the document in the list of documents for the current site, and can select it there.

8. Change the title (the clickable text for the link) if needed.
9. Select to open in new window, or not.
10. Click **Add** to create the link.



Creating a Custom Link

A custom link can open anything you can reach through a link (Permissions still apply, of course). Follow these steps:

1. Select **Custom Link**.
2. Type, or copy and paste, a Url.

If it's an external link (outside the portal), the link must begin with either `http://` or `https://`.

3. Change the title (the clickable text for the link) if needed.
4. If you want the link to be opened in a new window (which is normally a good idea for external links), select **Open in New Window**.
5. Click **Add** to create the link.

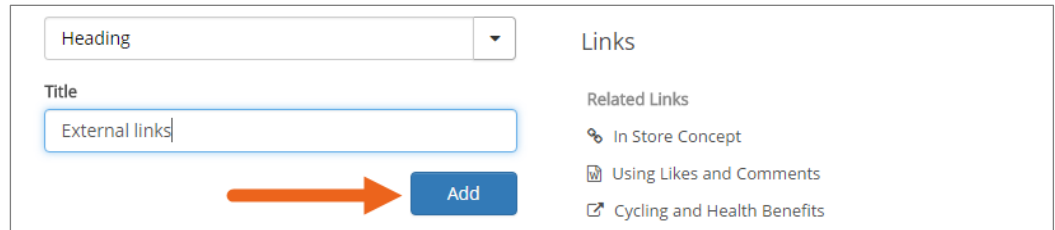
The screenshot shows a web application interface with a 'Links' tab selected. The 'Custom Link' dropdown is set to 'Custom Link'. The 'Url' field contains 'https://www.betterhealth.vic.gov.au/health/healthyliv'. The 'Title' field contains 'Cycling and Health Benefits'. The 'Open in New Window' checkbox is checked. An orange arrow points to the 'Add' button.

Adding headings

If the links list is long, it's a good idea to group links using headings. When the first link is added, the main heading **Related Links** is added automatically (you can edit the heading later, the same way as any heading). All other headings you have to add "manually".

Follow these steps to add a heading:

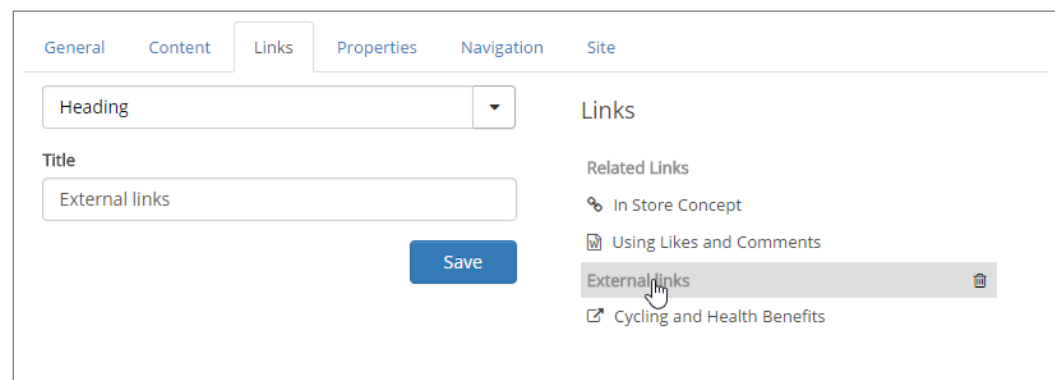
1. Select **Heading**.
2. Type the heading in the **Title** field.
3. Click **Add**.



Sort the list

When you have added all links and headings for the list, the list is most likely not in the best order. It's very easy to sort the list the way you want.

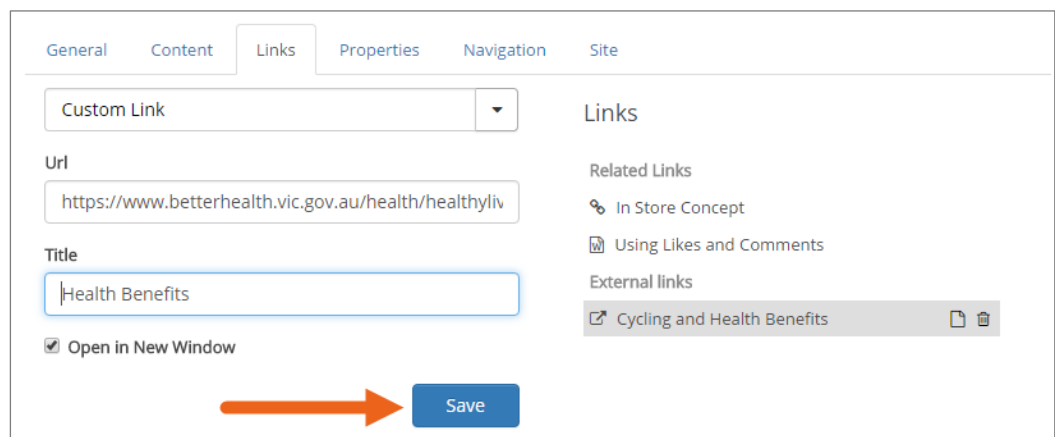
1. Use drag and drop to drag links and headings where you want them.



Edit, preview or delete a link or a heading

You can edit a link or a heading anytime, it's very easy to do.

2. Click the link you want to edit.
3. Make the necessary changes, and click **Save**.



4. To delete a link, click the dust bin – to preview the target of the link, click the “page” icon:

Note!

You have to save the page (and then for example click **Open Page**) to see the links list in its finished form.

The Properties Tab

The properties tab displays all page properties that have been configured as editable in the current publishing site. The available properties are configured by an administrator.

Here's an example:

In this example **Contact** and **Article date** will be displayed on the page, under the page image. Enterprise Keywords is primarily for searching (pages can normally be filtered on Enterprise Keywords in the search result). Note that a field such as Article date is not automatically updated when the page is edited. You have to update the date manually, if needed.

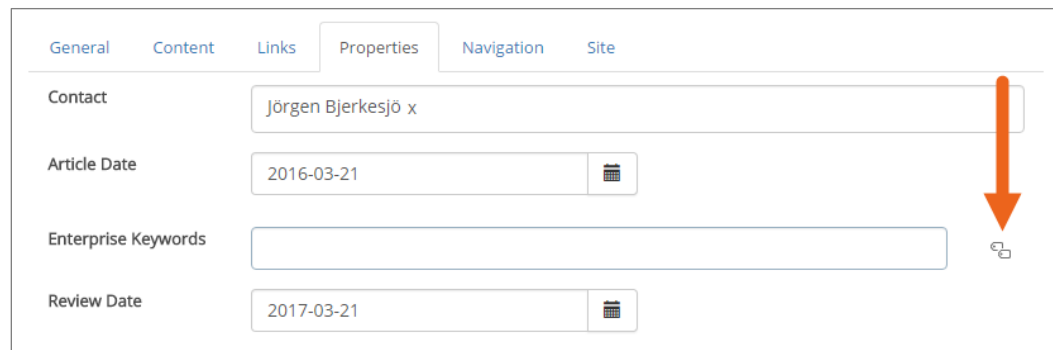
1. Enter or edit information in the fields as appropriate.

Adding Enterprise Keywords

Which properties that will be available for you will most likely differ, but **Enterprise Keywords** will probably be there.

You can add existing keywords to this page or create new ones. To add existing keywords, the easiest way is to choose from the list:

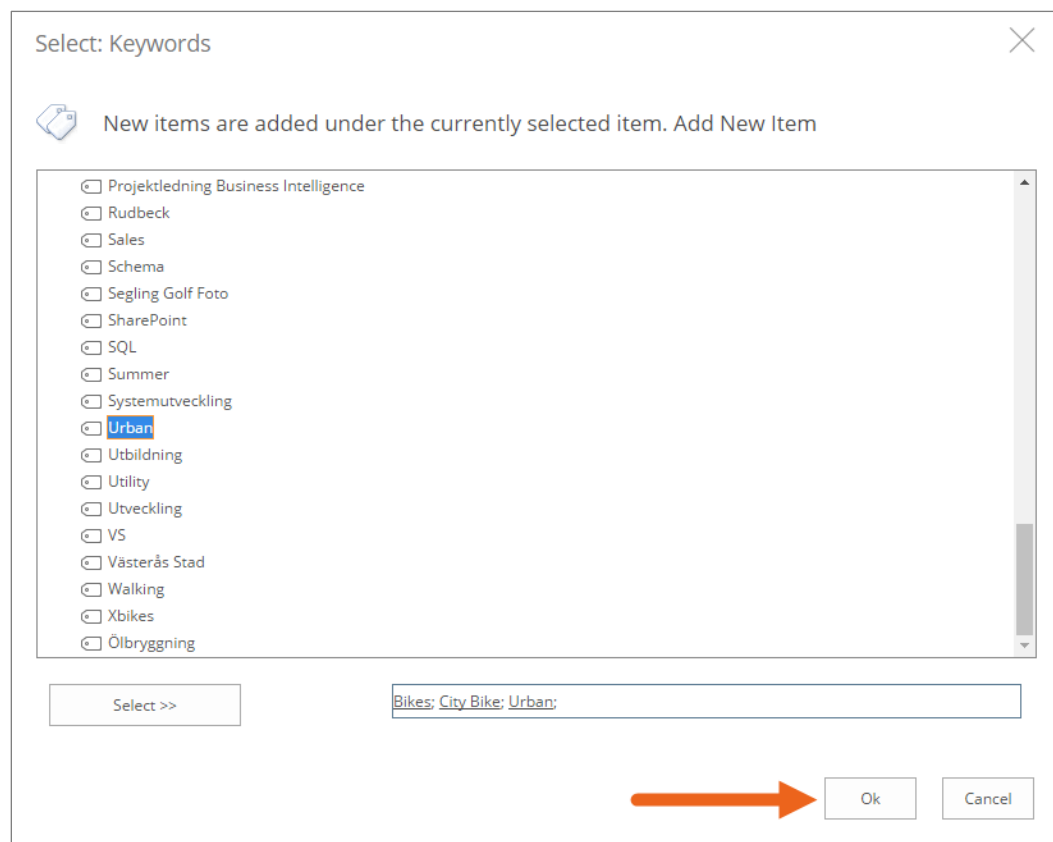
2. Click the icon to the right of the **Enterprise Keywords** field.



The screenshot shows a 'Properties' tab with several fields: 'Contact' (Jörgen Bjerkesjö x), 'Article Date' (2016-03-21), 'Enterprise Keywords' (empty), and 'Review Date' (2017-03-21). A red arrow points to a small icon to the right of the 'Enterprise Keywords' field.

The list of all existing keywords is shown.

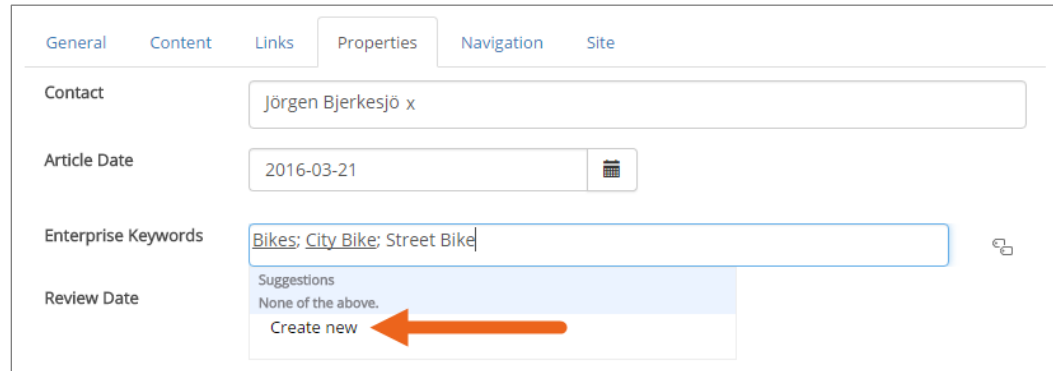
3. Double click all keywords you want to add to this page, and then click **OK**.



The 'Select: Keywords' dialog box shows a list of keywords: Projektledning Business Intelligence, Rudbeck, Sales, Schema, Segling Golf Foto, SharePoint, SQL, Summer, Systemutveckling, Urban (selected), Utbildning, Utility, Utveckling, VS, Västerås Stad, Walking, Xbikes, and Ölbrygning. A red arrow points to the 'Ok' button.

To add a new Enterprise Keyword, do the following:

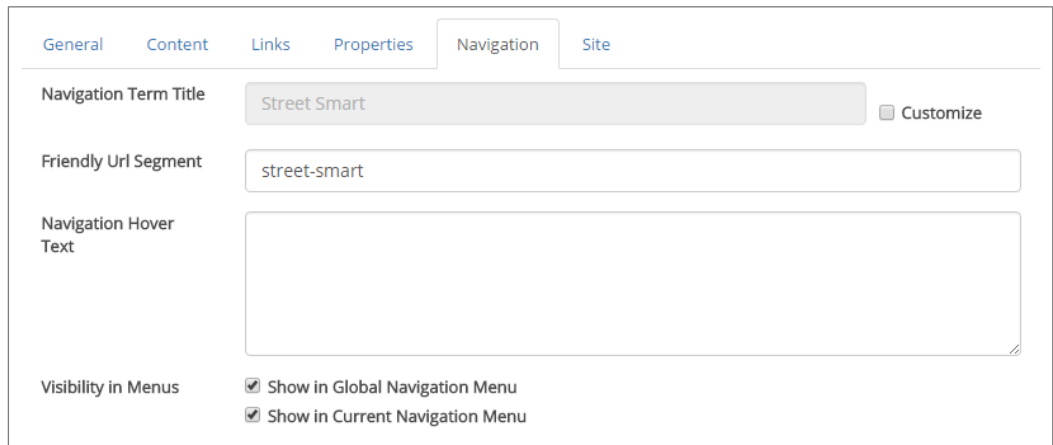
4. Type the keyword in the field.
5. Click **Create New**.



The screenshot shows the 'Properties' tab of a CMS interface. The 'Enterprise Keywords' field is active, displaying 'Bikes; City Bike; Street Bike'. A dropdown menu is open below it, showing 'Suggestions: None of the above.' and a 'Create new' option, which is highlighted by a red arrow.

The Navigation Tab

The navigation tab includes all settings related to the navigation. Very often there is no need to change anything here. The default works in most cases.



The screenshot shows the 'Navigation' tab of a CMS interface. The 'Navigation Term Title' field contains 'Street Smart'. The 'Friendly Url Segment' field contains 'street-smart'. The 'Navigation Hover Text' field is empty. The 'Visibility in Menus' section has two checked options: 'Show in Global Navigation Menu' and 'Show in Current Navigation Menu'.

By default, the navigation title will be the same as the page title. If you want a different navigation title, do the following:

1. Select **Customize**.
2. Enter a **Navigation Term Title**.

The friendly url to the page is built up of segments from all parent nodes in the navigation. The last segment in the url can be to edited. By default it is set to the title, excluding special characters.

It is also possible to set a hover text. The hover text will appear when the user holds the mouse over the node in the cross-sites-mega-menu and the current navigation. If you want to add a hover text, do the following:

1. Click in the field **Navigation Hover Text** and type the hover text.

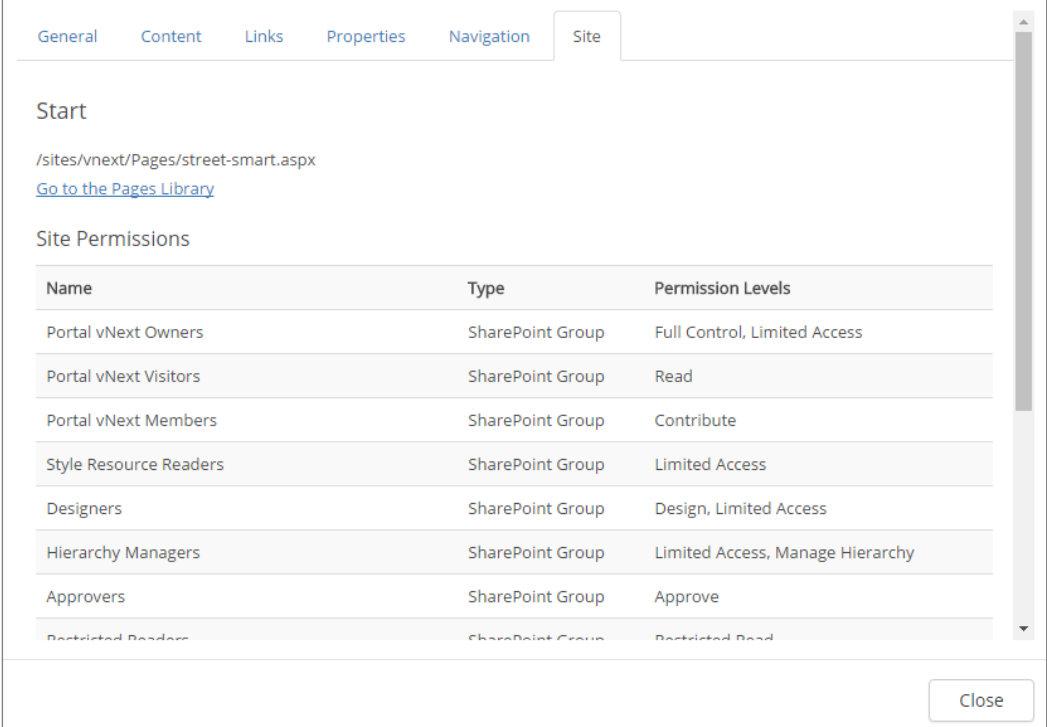
You can also set in which navigation the node for (=link to) this page should be visible.

1. Check **Show in Global Navigation Menu** if you want the navigation node to appear in the mega menu (the top menu for the portal).
2. Check **Show in Current Navigation Menu** if you want the navigation node to appear in the current navigation on the left-hand side of the page.

Note! The navigation node will always be visible in the breadcrumb.

The Site Tab

The site tab holds information about the current publishing site. It's normally used by an administrator.



General Content Links Properties Navigation Site

Start

/sites/vnext/Pages/street-smart.aspx

[Go to the Pages Library](#)

Site Permissions

Name	Type	Permission Levels
Portal vNext Owners	SharePoint Group	Full Control, Limited Access
Portal vNext Visitors	SharePoint Group	Read
Portal vNext Members	SharePoint Group	Contribute
Style Resource Readers	SharePoint Group	Limited Access
Designers	SharePoint Group	Design, Limited Access
Hierarchy Managers	SharePoint Group	Limited Access, Manage Hierarchy
Approvers	SharePoint Group	Approve
Restricted Readers	SharePoint Group	Restricted Read

Close

If you are familiar with working with the Pages library, you can use the link **Go to the Pages Library** to go there. In this documentation the Pages library is considered advanced functionality and is therefore not described.

If you have the permission to work with access permissions to the page, you can use the link **Edit Permissions**, below the site permissions list, to do that. But, working with permissions is truly advanced functionality. It is complex Sharepoint functionality and therefore not described in this document.

Document Management Document Authors	SharePoint Group	Limited Access
Start Document Readers	SharePoint Group	Limited Access
Start Document Authors	SharePoint Group	Limited Access
Edit Permissions		
<div>Close</div>		

Save and Publish

To make changes visible for all users, you always have to publish, even when you edit an existing page. A new page has to be published at least once for the navigation node to be visible.

When you edit a page, that page is automatically checked out to you and is ready for editing. The purpose of check out is to lock the page for editing for anyone else but you. To “release” a page for editing by someone else, you must either undo your changes, check in the page or publish the page.

If you go to a page using the navigation structure in Quick Edit and the page is not checked out to you, you must click **Edit** to start editing.

EditOpen PageDelete Page

GeneralContentLinksPropertiesNavigationSite

Title

Extreme Bikes


Summary

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Maecenas porttitor congue massa.

Image

/sites/vnext/SiteCollectionImages/CB%20Cruising.jpg

Browse



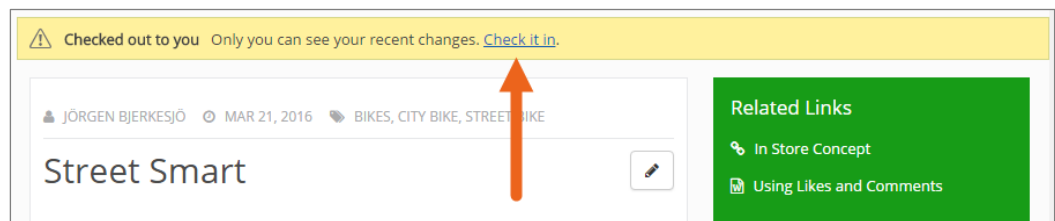
A recommendation is that you save (click the button **Save**) when you are finished editing a tab.

When you save, all changes since the last save are now saved, but the page will still be checked out to you.

Check in a page

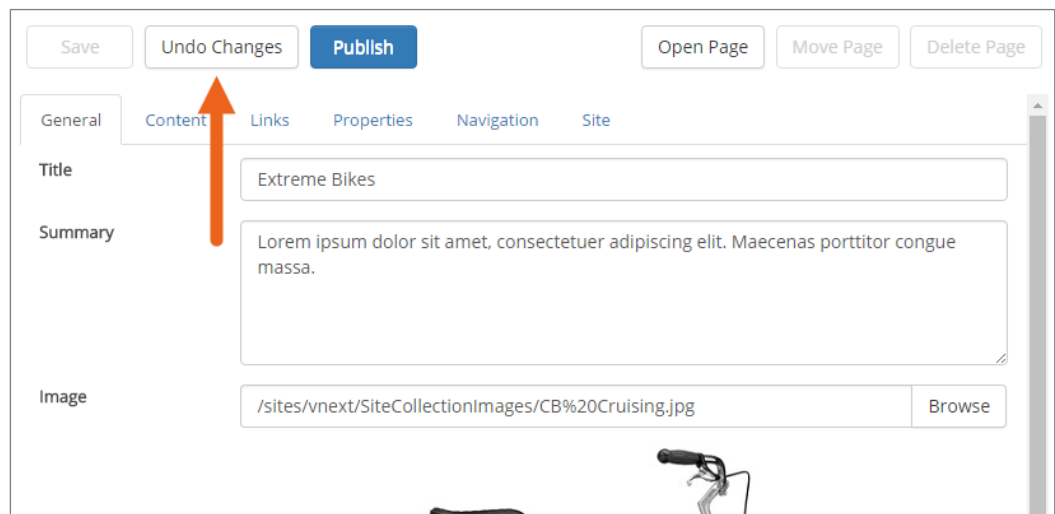
If another editor will edit a page you have started to work on, you must check in the page to make that possible. Here's how:

1. Go the page.
2. Click the **Check it in** link.



Undo changes

If you click **Undo Changes**, any changes made since the page was opened in Quick Edit (even saved changes) will be discarded and the page will be checked in.



Note!

If you just open a page with Quick Edit to just have a look or to just add pages, the page is always checked out to you and you must click Undo Changes to undo the check out.

Publish a page

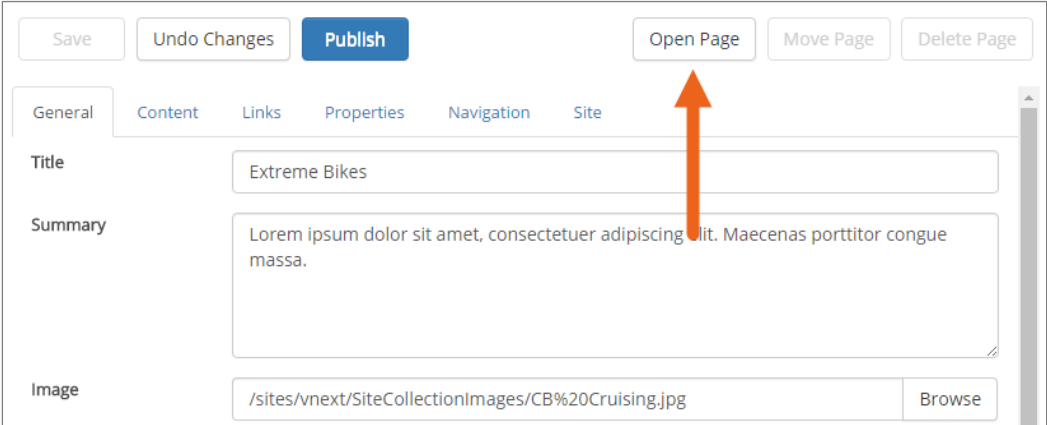
For a new page to be visible for users, you must publish the page. If you edit an existing page (an “existing” page is a page that has been published at least once), you must publish for the changes you have made to be visible.

Regarding what editors will see there is an important difference between Omnia Quick Pages and standard Sharepoint pages. (The end user will always see the same thing: the latest published version.)

- For a standard Sharepoint page (= Enable legacy web parts is checked), an editor will see the *latest edited version*, regardless of who made the changes, and regardless of whether that version is published or not.
- For a Quick Page (= Enable legacy web parts is NOT checked), an editor will always see the *latest published version* and must open the page for editing to see the latest edited version.

You can preview the page before you publish, do the following:

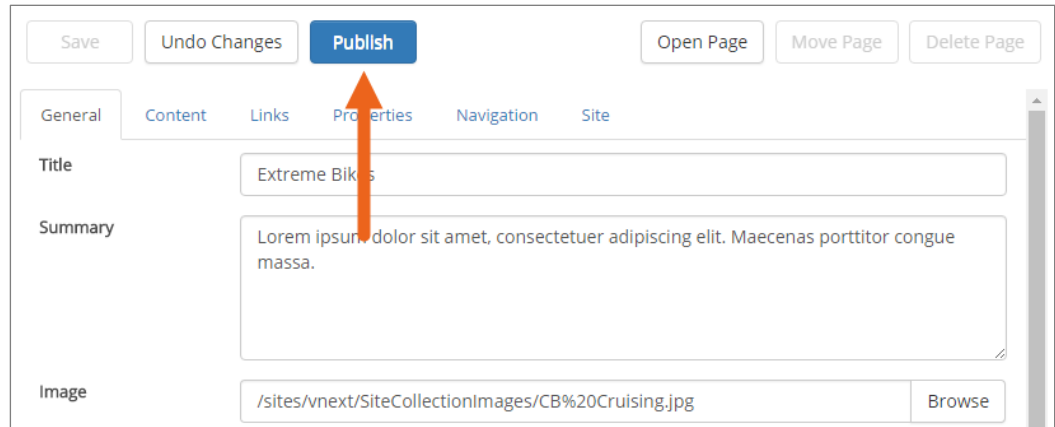
1. Save the changes you have made.
2. Click **Open page**.



The screenshot shows the SharePoint page editor interface. At the top, there are buttons for 'Save', 'Undo Changes', 'Publish', 'Open Page', 'Move Page', and 'Delete Page'. Below these are tabs for 'General', 'Content', 'Links', 'Properties', 'Navigation', and 'Site'. The 'General' tab is selected, showing fields for 'Title' (Extreme Bikes), 'Summary' (Lorem ipsum dolor sit amet, consectetur adipiscing elit. Maecenas porttitor congue massa.), and 'Image' (/sites/vnext/SiteCollectionImages/CB%20Cruising.jpg). An orange arrow points to the 'Open Page' button.

When it's time to publish the page, do the following:

1. Save the changes you have made.
2. Click **Publish**.



The screenshot shows a web page editor interface. At the top, there is a horizontal bar with five buttons: 'Save', 'Undo Changes', 'Publish', 'Open Page', and 'Move Page', followed by 'Delete Page'. The 'Publish' button is highlighted in blue. Below this bar is a tabbed interface with six tabs: 'General', 'Content', 'Links', 'Properties', 'Navigation', and 'Site'. The 'Content' tab is selected. The 'Content' tab contains three main sections: 'Title' with a text input field containing 'Extreme Bikes', 'Summary' with a text area containing 'Lorem ipsum dolor sit amet, consectetur adipiscing elit. Maecenas porttitor congue massa.', and 'Image' with a text input field containing '/sites/vnext/SiteCollectionImages/CB%20Cruising.jpg' and a 'Browse' button. A red arrow points from the 'Publish' button down to the 'Content' tab.

Note!

When you publish a page, you don't have to check in the page separately. Publish always mean both check in and publish.