



Sitecore CMS 6.0 or later

# Package Designer Guide

*An administrator's guide to creating and editing Sitecore packages*

## Table of Contents

Chapter 1	Introduction .....	3
Chapter 2	Creating a Package .....	4
2.1	Creating a New XML Project .....	5
2.1.1	Adding Items, Files and Security Accounts to an XML Project .....	6
	Adding Items Dynamically .....	7
	Adding Files Dynamically .....	11
	Adding Items Statically .....	14
	Adding Files Statically .....	16
	Adding a Security Account to a Source .....	18
2.2	Creating a ZIP Archive of an XML Project .....	22
2.3	Previewing the Contents of a Package .....	24
Chapter 3	Modifying a Package .....	25
3.1	Modifying an Existing XML Project .....	26
3.1.1	Editing Dynamically Added Item Sources .....	26
	Removing a Source .....	27
	Editing the Source Items .....	27
	Filters .....	28
	Installation Options .....	30
	Preview .....	31
3.1.2	Editing Dynamically Added File Sources .....	31
	Removing the Source .....	32
	Editing the Source Files .....	32
	Filters .....	32
	Installation Options .....	33
	Preview .....	34
3.1.3	Editing Statically Added Item Source .....	34
	Removing the Source .....	34
	Editing the Source Items .....	34
	Adding Items .....	35
3.1.4	Editing a Static File Source .....	35
3.1.5	Editing a Security Account Source .....	36
3.2	Modifying an Existing ZIP Package .....	39
Chapter 4	Installing a Sitecore Package .....	40
4.1	Installing a Package .....	41
Chapter 5	Administrator's Notes .....	44

# Chapter 1

## Introduction

You use the Package Designer to create packages with Sitecore items that can be easily transferred, for example from one Sitecore website to another and opened in Sitecore.

You can use Package Designer to create or modify packages that could contain dynamically or statically created item, or files. Packages that you create with the Package Designer can also contain security accounts.

This document contains the following chapters:

- **Chapter 1 – Introduction**  
A brief introduction to what Package Designer is.
- **Chapter 2 – Creating a Package**  
This chapter explains how you create a ZIP package from an XML package and how you preview the contents of the ZIP package in the Package Designer.
- **Chapter 3 – Modifying a Package**  
This chapter explains how you modify the contents of an XML package and ZIP package in the Package Designer.
- **Chapter 4 – Installing a Sitecore Package**  
This chapter explains how you install a ZIP package with Sitecore Installation Wizard.
- **Chapter 5 – Administrator's Notes**  
This chapter contains information for developers.

## Chapter 2

# Creating a Package

This chapter describes how to create a Sitecore ZIP package that contains items, files and security accounts from an XML project and how to preview the content of the package.

This chapter contains the following sections:

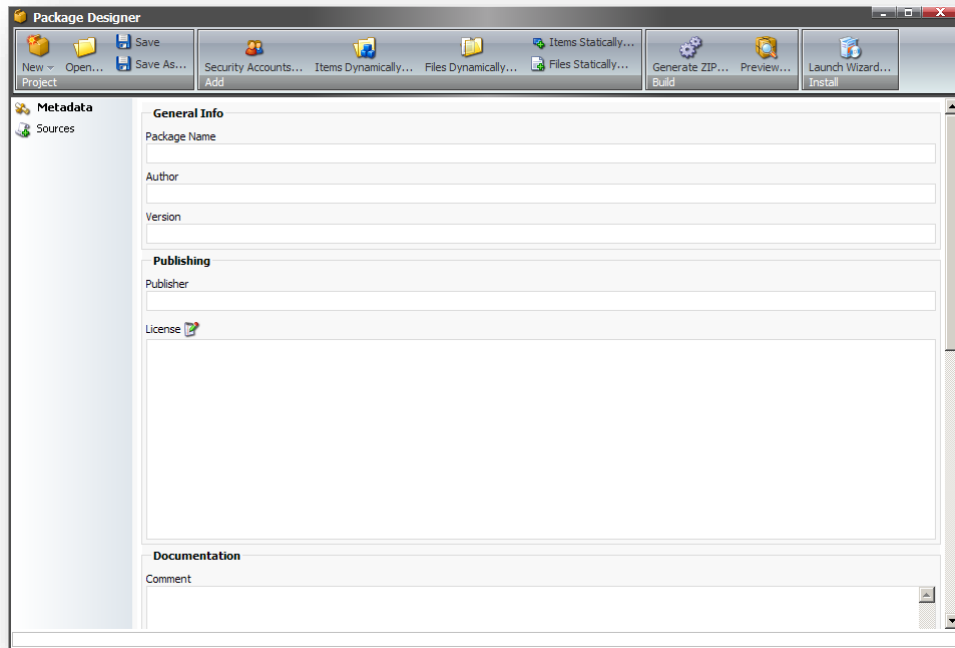
- Creating a New XML
- Creating a ZIP Archive of an XML Project
- Previewing the Contents of a Package

## 2.1 Creating a New XML Project

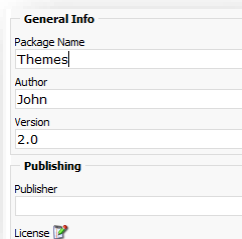
Before you create a ZIP package, you must create an XML project. The XML project can contain files and/or items that are added statically and/or dynamically, as well as security accounts. The content of the XML package is saved as an XML file in the Package Designer.

To create a new XML project:



1. In the Sitecore Desktop, click **Sitecore**, and then click **Development Tools** to open the Package Designer. The Package Designer displays a blank project.



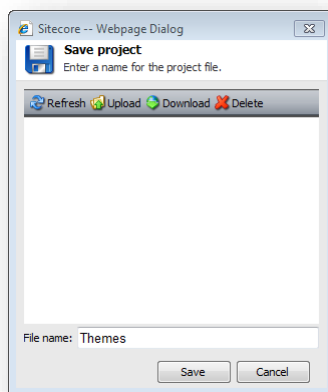
2. The Package Designer can contain the last package that you created. In this case, in the **Project** group, click **New**. The Package Designer displays a blank project.
3. When you create a new XML project, **Metadata** is selected and you can enter details about the package you are about to create.



Field Name	Required or Optional	Description
<b>Package Name</b>	Required	In this field, you enter the name for the package that you are going to create. The package name can contain letters, numbers, underscore, hyphen, figures, spaces and periods. If you enter an invalid symbol, an error message appears.

Field Name	Required or Optional	Description
<b>Author</b>	Optional	In this field, you can specify the author of the package.
<b>Version</b>	Optional	In this field, you can specify the version of the package.
<b>Publisher</b>	Optional	In this field, you can specify the name of the publisher of the package.
<b>License</b>	Optional	In this field, you can enter information about the license to the package. Click  to attach the license to the package.
<b>Comment</b>	Optional	In this field, you can write a comment about the package that you want to create.
<b>Read me</b>	Optional	In this field, you can specify information about the readme file to the package. Click  to insert the readme file.
<b>Post Step</b>	Optional	In this field, you can specify any post installation steps to the package that you want to create. See section <i>Chapter 5 Administrator's Notes</i> for more information about how to specify the post step to be performed at the end of the installation process.
<b>Custom Attributes</b>	Optional	In this field, you can specify any other attributes of the package that you want to create.

- After you finished editing the metadata, click **Save** or **Save As** to save the XML project. The **Save project** dialog box is displayed.



- In the **File name** field, enter the name for the new XML project and click **Save**.  
Now you can add files, items, or security accounts and create the package.

## 2.1.1 Adding Items, Files and Security Accounts to an XML Project

An XML project consists of metadata information about the package and one or more sources. Sources contain the items, files, and security accounts that make up the package.

Sources that contain items, files, and security accounts can be:

- Dynamic (based on search criteria)
- Static.

You should use static sources when you want to include all the items or files that are stored under a specific node or folder in the content tree or if you only want to include a few specific items or files.

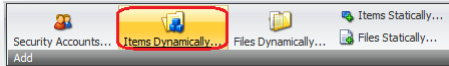
You should use dynamic sources when the items or files that you want to include cannot be easily selected, for example, if you want to include everything created after a certain date.

## Adding Items Dynamically

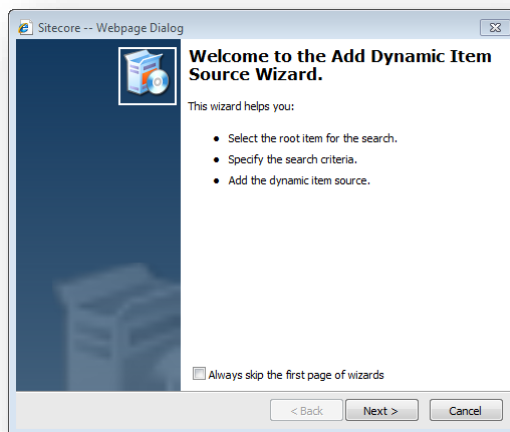
When you add items dynamically to an XML project, you are adding them to a source.

To add items dynamically to a source:

1. In the **Package Designer**, in the **Add** group, click **Items Dynamically**.

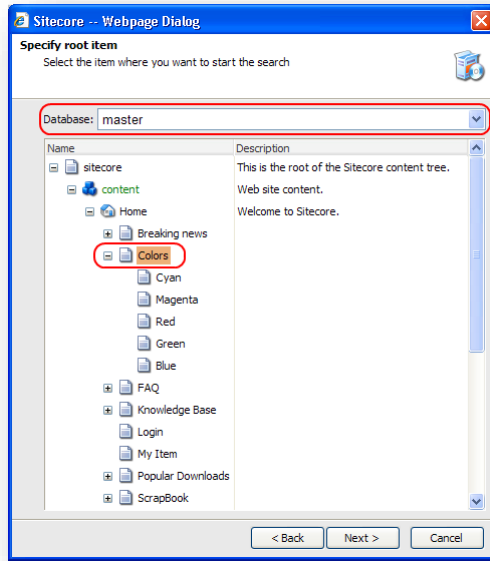


The **Add Dynamic Source Item Wizard** opens.

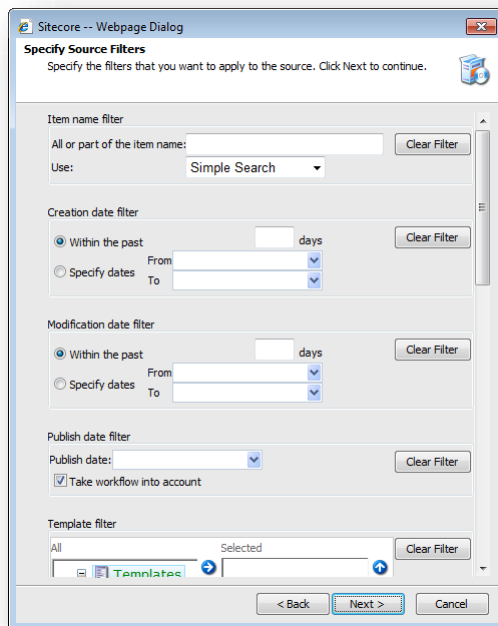


This wizard will guide you through the process of adding a dynamic item source.

2. Click **Next**. The **Specify root item** dialog box opens.



3. In the **Specify root item** dialog box, in the **Database** field, use the drop-down list to select the database you want to create a source from.
4. Expand the content tree and select the item that you want to be the source item for your package.
5. Click **Next** and the **Specify Source Filters** dialog box opens.



Now you can filter the items that you want to include in the package.

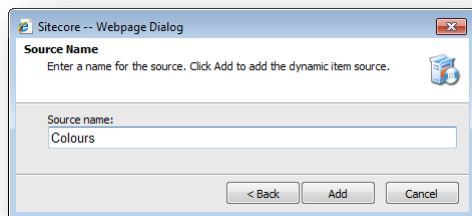
Section	Field	Description
---------	-------	-------------



Section	Field	Description
<b>Item name filter</b>	<b>All or part of the item name</b>	Filter items by name or by a part of the name.
	<b>Use</b>	<p>Select a lookup option. The lookup options are:</p> <ul style="list-style-type: none"> <li>• <i>Simple Search</i> Simple substring search, no wildcards, not case sensitive.</li> <li>• <i>Regular Expression</i> Common regular expressions and regular .NET expressions are allowed. For more information about regular .NET expressions, read the <a href="#">official Microsoft documentation</a>.</li> <li>• <i>Wildcards</i> Common wildcards are allowed. A question mark (?) stands for a single character. An asterisk (*) stands for any number of characters. Any other character is matched as is. Search is not case sensitive.</li> </ul>
<b>Creation date filter</b>	<b>Within the past ... days</b>	<p>Filters items by the date they were created.</p> <p><b>Note</b> The <i>Within the past XX days</i> function is just a UI convenience; this is not a floating date. When a user enters a number of days, this value is converted to a static date range.</p>
	<b>Specify dates</b>	Filters items by the date they were created.
<b>Modification date filter</b>	<b>Within the past ... days</b>	<p>Filters items by the date they were modified.</p> <p><b>Note</b> The <i>Within the past XX days</i> function is just a UI convenience; this is not a floating date. When a user enters a number of days, this value is converted to a static date range.</p>
	<b>Specify dates</b>	Filters items by the date they were modified.

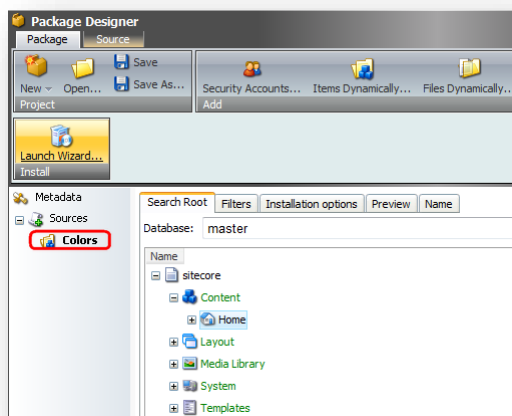
Section	Field	Description
<b>Publish date filter</b>	<b>Publish date</b>	Includes only those items which are publishable on a specific date. You will get only those items from the source, which appear in the web database if you perform republishing on the <i>Publish date</i> .
	<b>Take workflow into account</b>	Select the <i>Take workflow into account</i> checkbox if you want to apply workflow restrictions to publishing when filtering.
<b>Template filter</b>		Filters items by templates that the items are based on. Only the items which are based on at least one of the templates from the list are added.
<b>Created by filter</b>		Filters items by the users who created them and/or by the roles which the users who created the items belong to. Click <b>Add</b> to display the list of users or roles and add them to the filter.
<b>Updated by filter</b>		This filter works in a similar way as the <b>Created by Filter</b> one. It filters by users who updated an item last and/or by roles which those users belong to.
<b>Language filter</b>		Select the checkboxes you want to make only the items in the selected languages added.

6. Click **Next**.



7. In the **Source Name** dialog box, enter a name for the source and click **Add**.

- Click **Finish**. The new dynamic item source is added to *Metadata / Sources*.



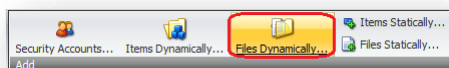
## Adding Files Dynamically

You can also add files dynamically to a source.

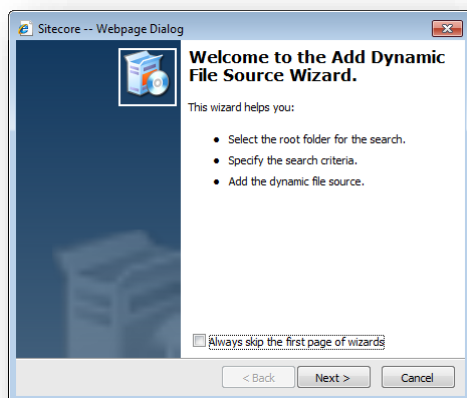
After you add the files to a source, you give a name to this source.

To add a dynamic file source:

- In the **Project Designer**, in the **Add** group, click **Files Dynamically**.

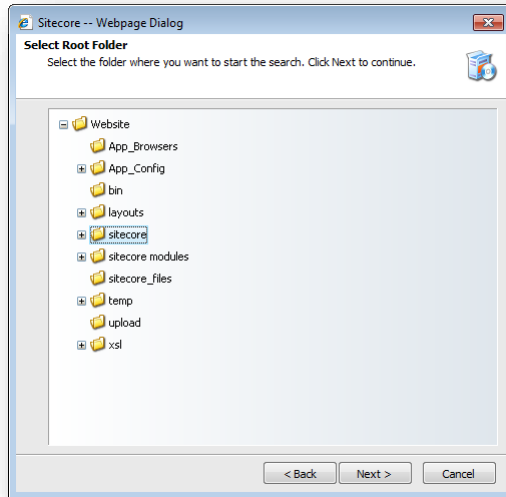


The **Add Dynamic Source Item Wizard** opens.

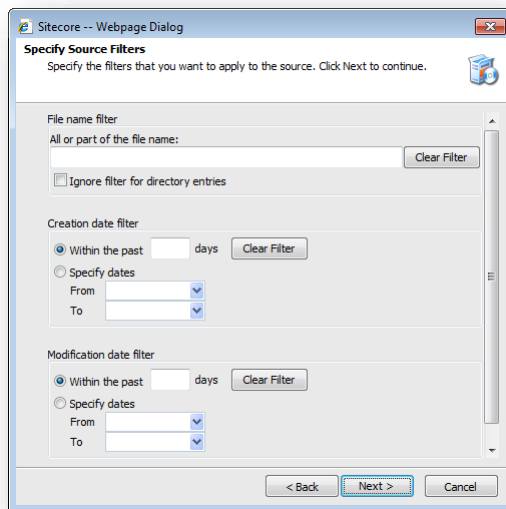


This wizard will guide you through the process of adding a dynamic item source.

2. Click **Next**. The **Select Root Folder** dialog box opens.



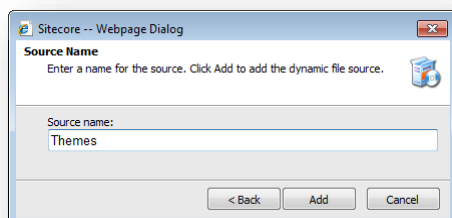
3. Select the folder whose files you want to be added dynamically to the source.
4. Click **Next**. The **Specify Source Filters** dialog box is displayed.



Section Name	Field Name	Description
Item name filter	All or part of the item name	Filters files by name or a part of the name.
Item name filter	Ignore filter for directory entries	Select the <i>Ignore filter for directory entries</i> checkbox if you don't want to include directories in the search results.

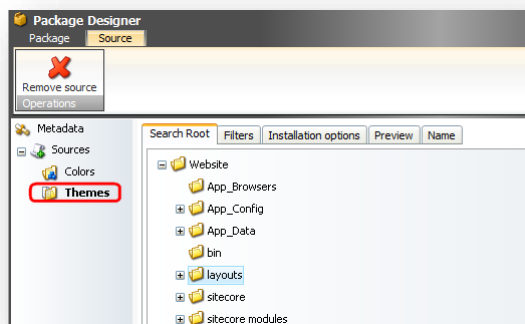
Section Name	Field Name	Description
Creation date filter	Within the past ... days	Filters files by the date they were created.  <b>Note</b> The <i>Within the past XX days</i> function is just a UI convenience; this is not a floating date. When a user enters a number of days, this value is converted to a static date range.
Creation date filter	Specify dates	Filters files by the date they were created.
Modification date filter	Within the past ... days	Filters files by the date they were modified.  <b>Note</b> The <i>Within the past XX days</i> function is just a UI convenience; this is not a floating date. When a user enters a number of days, this value is converted to a static date range.
Modification date filter	Specify dates	Filters files by the date they were modified.

- Fill in the fields with the filtering criteria that you want the **Package Designer** to use to filter the files of the selected folder.
- Click **Next**.



- In the **Source Name** dialog box, enter a name for the source and click **Add**.
- Click **Finish**.

9. The new dynamic file source is added to *Metadata/Sources*.



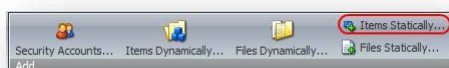
## Adding Items Statically

You can also add items statically to a source.

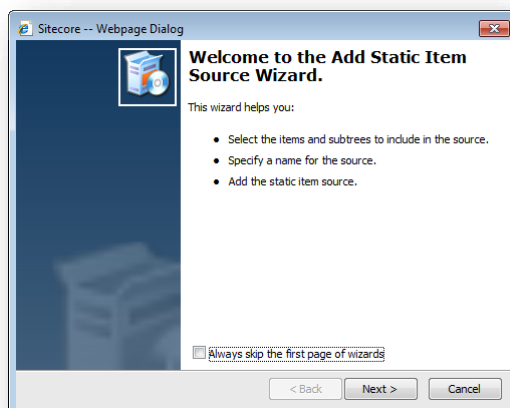
After you add the items to a source, you give a name to this source.

To add items statically to a source:

1. In the **Package Designer**, in the **Add** group, click **Items Statically**.

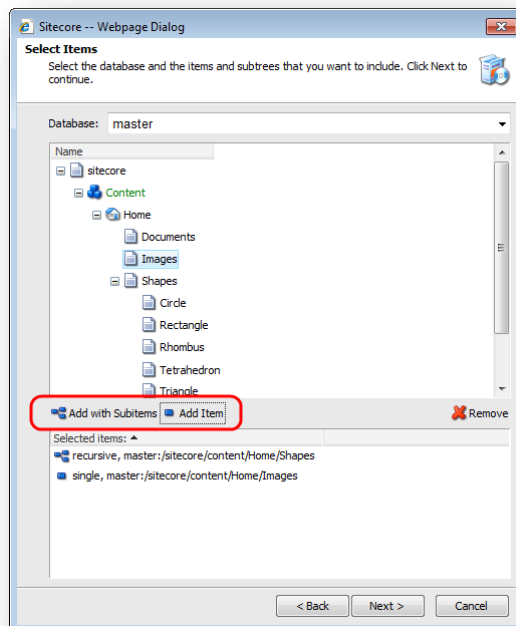


The **Welcome to the Add Static Item Source Wizard** opens.

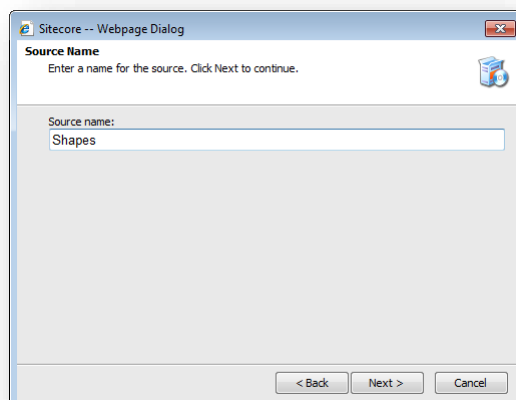


This wizard will guide you through the process of adding a static item source.

2. Click **Next**.
3. In the **Select Items** dialog box, select the item that you want to include in the source.

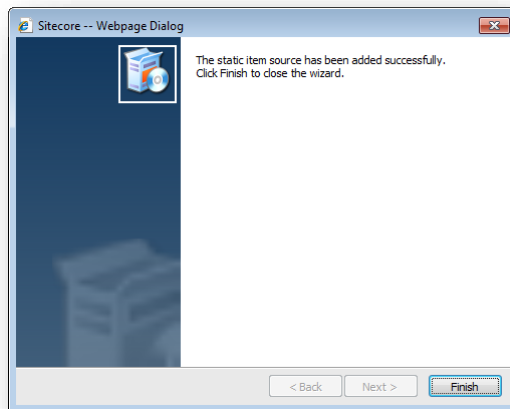


4. In the **Database** field, select the database you want to use. In the content tree, select the item that you want to add to the source.
5. To add an item and all its subitems, click **Add with Subitems**.
6. To add a single item (without its subitems), click **Add item**.
7. To remove one of the selected items, in the **Selected items** field, select it and click **Remove**.
8. Click **Next**.

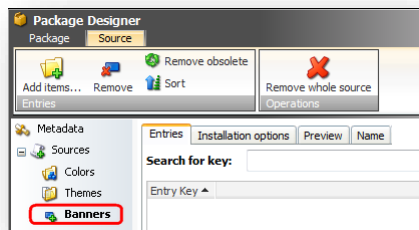


9. In the **Source Name** dialog box, in the **Source name** field, enter a name for this source.

10. Review the final screen and click **Finish**.



The new static source is added:



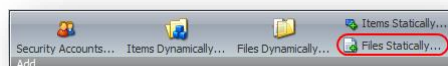
## Adding Files Statically

You can also add files statically to a source.

After you add the files to a source, you give a name to this source.

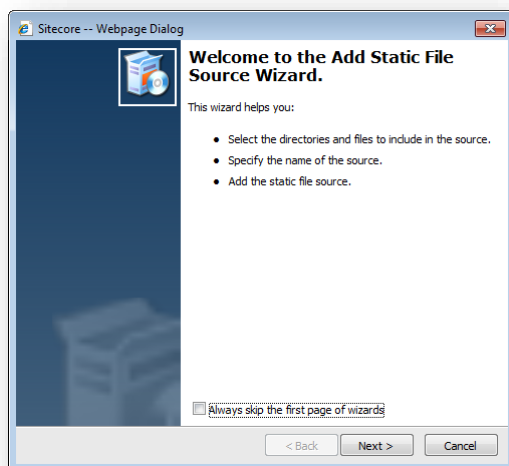
To add a file statically to a source:

1. In the **Package Designer**, in the **Add** group, click **Files Statically**.



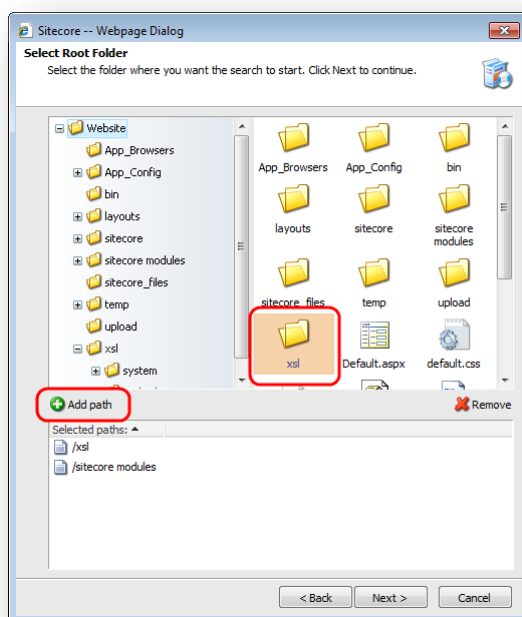


The **Welcome to the Add Static File Source Wizard** dialog box opens.



This wizard will guide you through the process of adding a static file source.

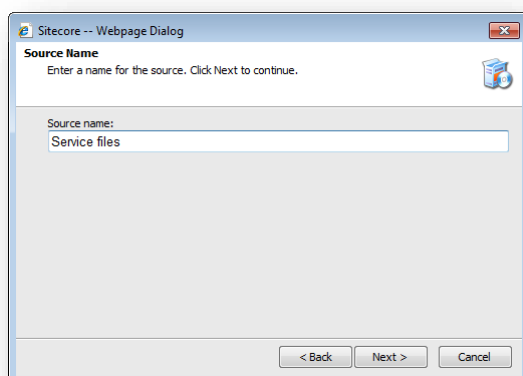
2. Click **Next**.
3. In the **Select Root Folder** dialog box, select the folder or file that you want to include in the source.



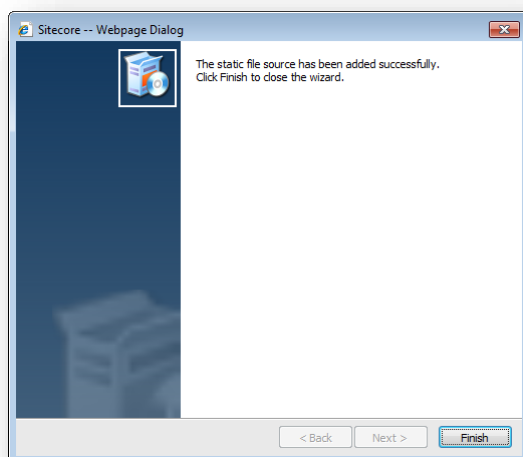
You can add several folders and its content to the source.

4. Click **Add path** to add all its subfolders and files to the source.

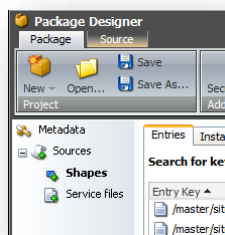
5. Click **Next**.



6. In the **Source Name** dialog box, in the **Source name** field, enter a name for the source.
7. Click **Next**.



8. Click **Finish**. A new static source is added to the *Sources* list.



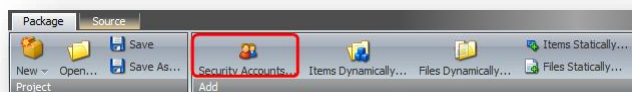
## Adding a Security Account to a Source

You can also add security accounts to a source.

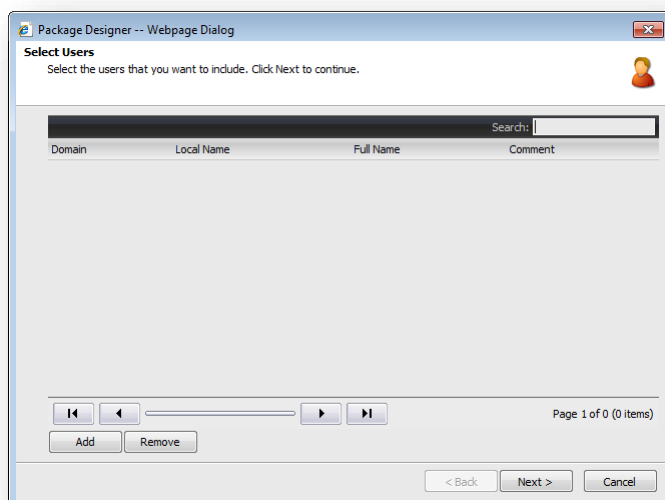
In Sitecore, a security account can either be a user or a role.

To add a security account source:

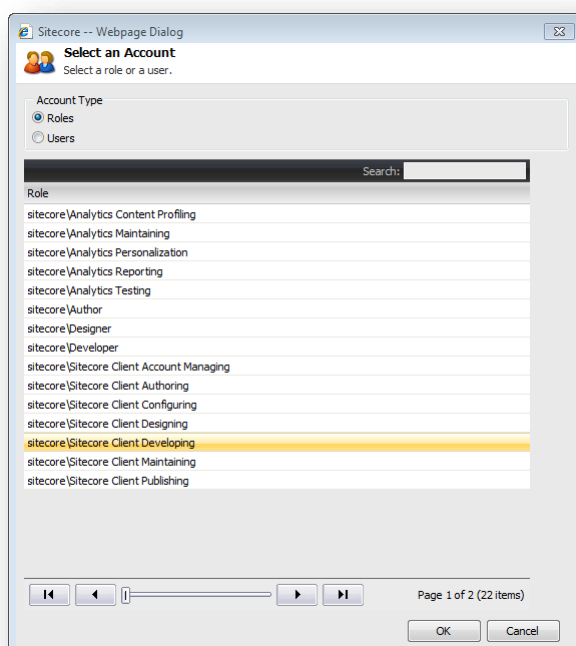
1. In the **Package Designer**, in the **Add** group, click **Security Accounts**.



The **Select Users** dialog box opens.



2. In the **Select Users** dialog box, click **Add** and the **Select an Account** dialog box is displayed.

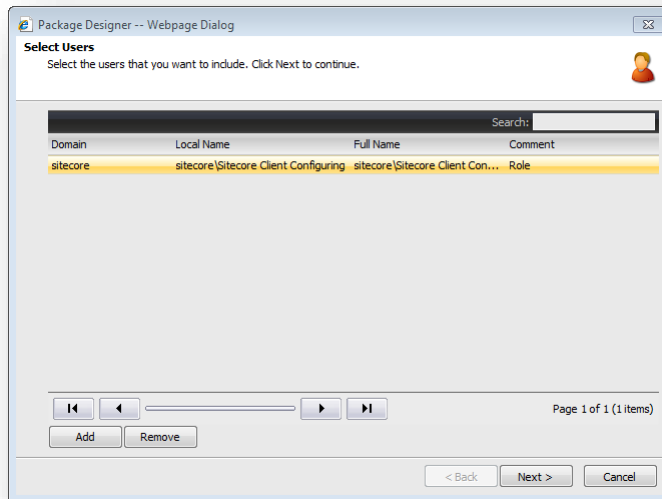


3. To select a role, in **Account Type** section, select the **Roles** option. Only roles from the current domain are displayed.

#### Note

The list of the available roles displays roles from all the domains available on your computer.

- Click the role you want, and then click **OK**. The role is added.

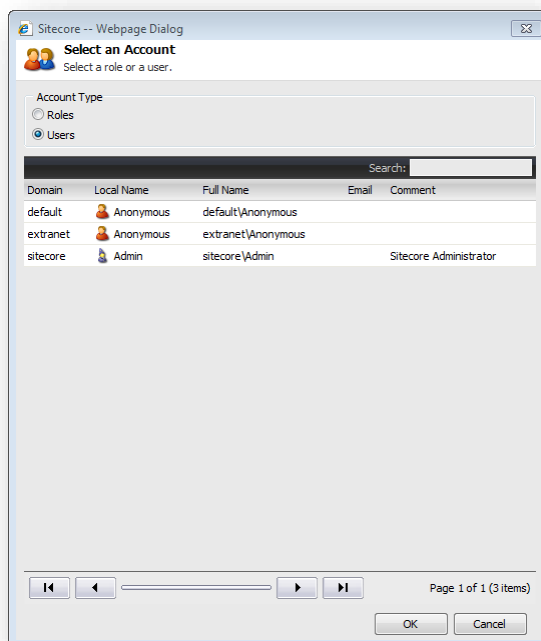


You can use the **Search** field to quickly find the role you want.

To select several roles at a time, press and hold CTRL+SHIFT while you click the required roles.

To quickly add a role, double-click it.

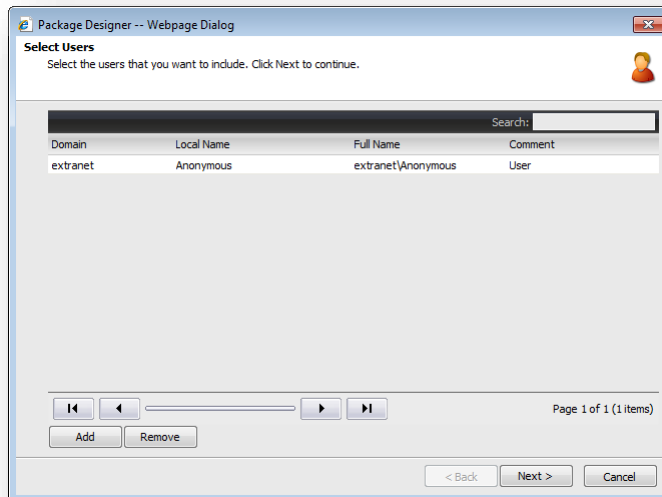
- To select a user, in **Account Type** section, select the **Users** option. The list of available users for current domain is displayed.



**Note**

The list of the available users displays the users from all the domains available on your computer.

- Click the user you want to add, and then click **OK**. The user is added.

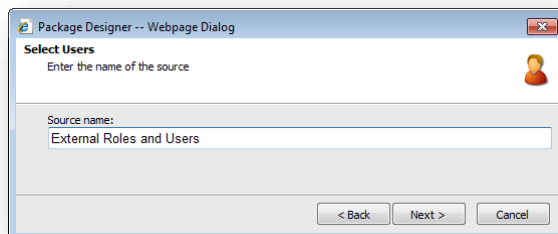


You can use the **Search** field to quickly find the user you want.

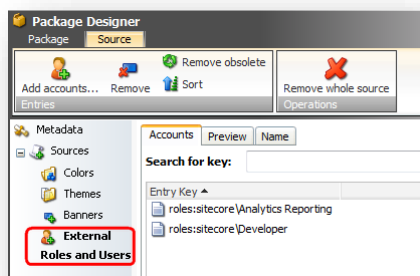
To select several users at a time, press and hold CTRL+SHIFT while you click the required users.

To quickly add the selected users, double-click the selected users.

- When you are finished adding roles and users, click **Next**.
- In the **Select Users** dialog box that opens, in the **Source name** field, type in the name for this security accounts package.



- Click **Next** and the new security accounts source is added.

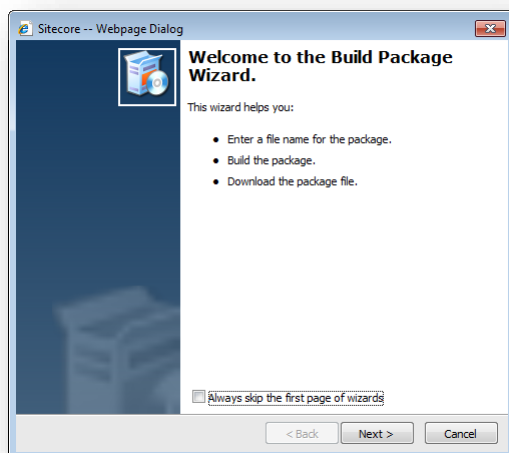


## 2.2 Creating a ZIP Archive of an XML Project

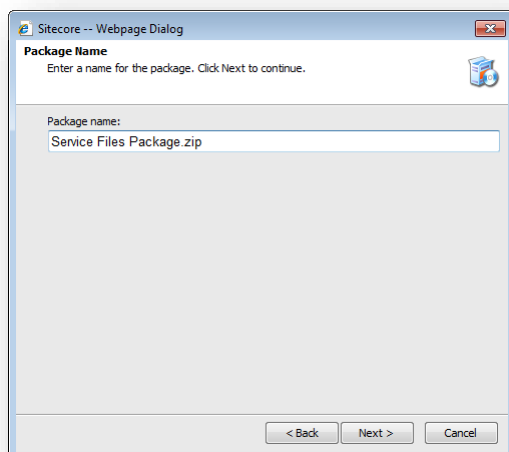
You can use Sitecore ZIP packages to transfer Sitecore content from one installation to another. The format of Sitecore ZIP packages differs from the standard zip archives.

To create a ZIP archive of a package:

1. Make sure that all the items that are referenced by static sources exist. To do this, on the **Source** tab, in the **Entries** group, click **Remove obsolete**.
2. In the **Package Designer**, in the **Build** group, click **Generate ZIP** and the **Build Package** wizard opens.

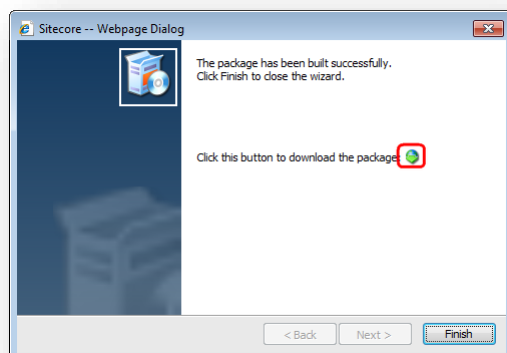


3. Click **Next** and the **Package Name** dialog box is displayed.



4. In the **Package name** field, enter a name for this package.

5. Click **Next** and the package is created.

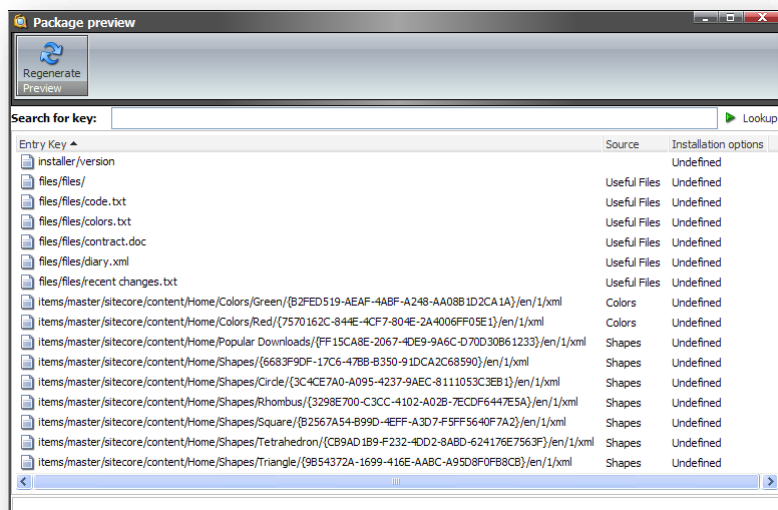


6. Click the **Download the package** button if you want to download the package:
7. Click **Finish** to close the wizard.

## 2.3 Previewing the Contents of a Package

You can preview the package that you created to see its content.

To preview the package, in the Package Designer, in the **Build** group, click **Preview**. The **Package preview** window is displayed.



To display all the entries in the package, click **Lookup**.

To search for a specific entry, enter its key in the **Search for key** field and click **Lookup**.

In the **Package preview** window, the contents of the package are sorted in the following order:

- internal service entry (version of the installer that generated the package)
- metadata
- files
- items
  - templates
  - other items
- security accounts

A directory entry precedes any files in the directory.

A parent item precedes its descendants.

Item versions are grouped by item ID and language.



## Chapter 3

# Modifying a Package

You can modify the content of the Sitecore ZIP packages that you create. You can modify all of the information in a package including the metadata and the files, items and security accounts in the sources.

This chapter contains the following chapters:

- Modifying an Existing XML Project
- Modifying an Existing ZIP Package

### 3.1 Modifying an Existing XML Project

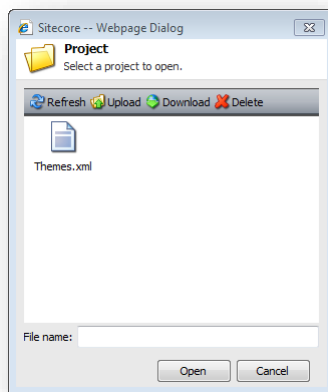
After you compiled a package, it is saved as an XML project. You can modify your saved XML projects.

To modify an existing XML project:

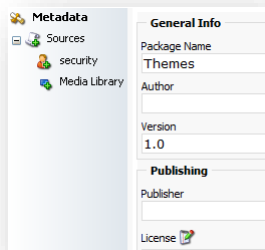
1. In the **Project Designer**, in the **Project** group, click **Open**.



The **Project** dialog box with the existing XML project is displayed.



2. Select the project you want to edit and then click **Open**. The metadata and the content of the **Sources** section are displayed.



3. Now you can add, edit, or delete entire sources or the files, items, and security accounts in these sources.
4. After you make changes to the package, click **Save** or **Save As**.

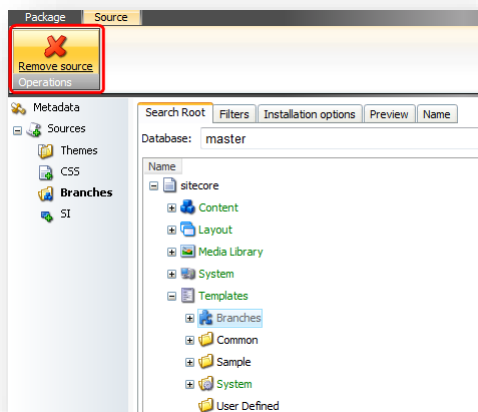
#### Note

When you click **Save** or **Save As**, Sitecore saves the package as an XML file. If you want to export or install the package, you must create a ZIP archive of the XML file. For more information about how to create a ZIP archive of the package, see the section *Creating a ZIP Archive of an XML Project*.

#### 3.1.1 Editing Dynamically Added Item Sources

You can edit the dynamical item sources that you created.

To edit a dynamical item source, click the source item that you want to edit. The **Source** tab is displayed to the right of the **Package** tab.

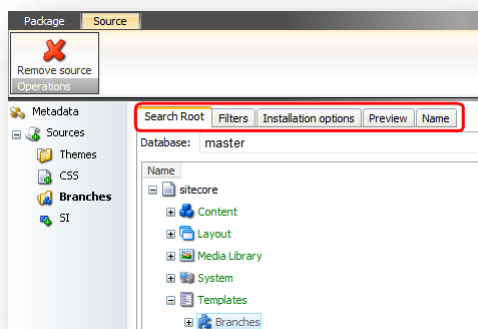


## Removing a Source

To remove a whole source, click **Remove source**.

## Editing the Source Items

On the **Source** tab, a set of tabs is displayed on the right-hand side of the dialog box.



In the **Search Root** tab, you can change the folder in the root item, from which your source items of files are dynamically taken.

In the **Filters** tab, you can change the filter options. For more information about the **Filters** tab, see the section *Filters*.

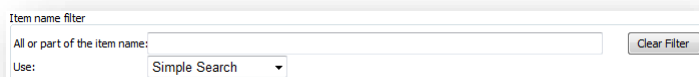
In the **Installation options** tab, you can change the installation options. For more information about the installation options, see the section *Installation Options*.

In the **Preview** tab, you can view the items, files, and so on that are included in the current source. For more information about the **Preview** tab, see section *Preview*.

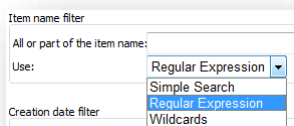
In the **Name** tab, you can rename the source dynamically generated item or file.

## Filters

### Item name filter



Use this filter to filter items by name or a part of the name. The **Use** field allows you to select different lookup options:



### Simple Search

Simple substring search, no wildcards, not case sensitive.

### Regular Expression

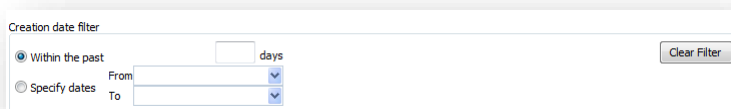
Common regular expressions and regular .NET expressions allowed.

For more information about regular .NET expressions, read the [official Microsoft website](#).

### Wildcards

Common wildcards are allowed. A question mark (?) stands for a single character. An asterisk (\*) stands for any number of characters. Any other character is matched as is. Search is not case sensitive.

### Creation Date Filter



Use the **Creation Date Filter** to filter items by their creation date.

#### Note

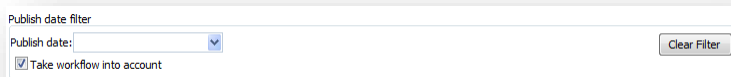
The *Within the past XX days* function is just a UI convenience; this is not a floating date. When a user enters a number of days, this value is converted to a static date range.

### Modification Date Filter

Use the **Modification Date Filter** to look for the date when the source was modified.

The **Modification Date Filter** is the same as the **Creation Date Filter**, but in this case the modification dates are used.

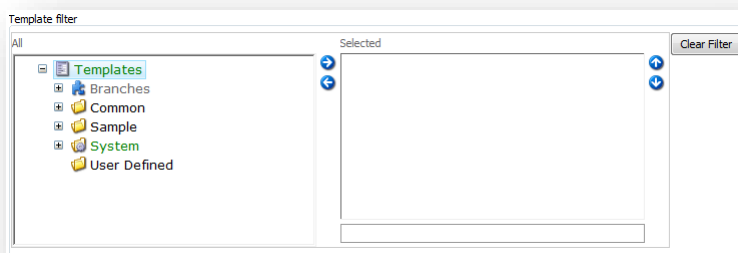
## Publish Date Filter



This filter allows you to include only those items which are publishable on a specific date. In other words, you will get only those items from the source, which appear in web database if you perform republishing on the *Publish date*.

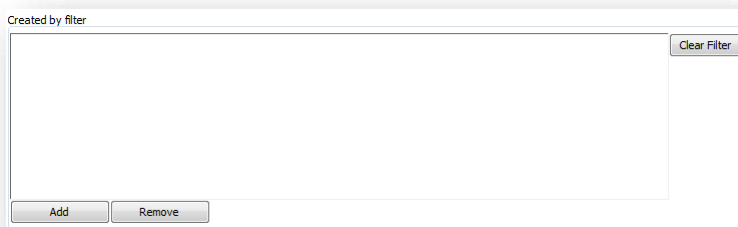
Select the *Take workflow into account* checkbox if you want to apply workflow restrictions to publishing when filtering.

## Template Filter



Use the **Template Filter** to filter items by templates that the items are based on. Only the items which are based on at least one of the templates from the list are added.

## Created by Filter

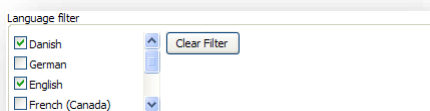


Use the **Created by Filter** filter to filter items by the users who created them and/or by the roles which the users who created the items belong to. Click **Add** to display the list of users or roles and add them to the filter.

## Updated by Filter

This filter works in a similar way as the **Created by Filter** one. It filters by users who updated an item last and/or by roles which those users belong to.

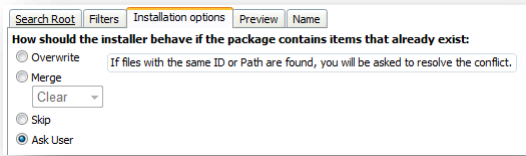
## Language Filter

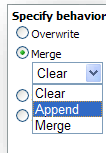


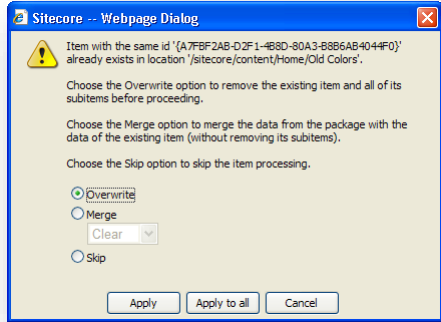
Select the checkboxes you want to make only the items in the selected languages added.

## Installation Options

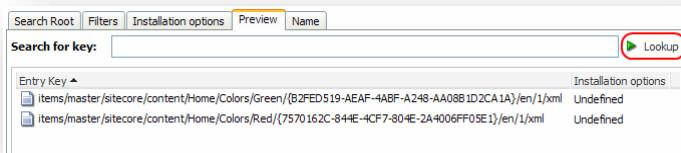
On the **Installation options** tab, you define how the system acts if the item being installed already exists in the target installation. The items are compared by their ID.



Field Name	Description
<b>Overwrite</b>	Items with the same ID (along with any existing children) are replaced by items from the package.
<b>Merge</b>	<p>When you merge items, you can choose between the following options:</p>  <ul style="list-style-type: none"> <li>• <i>Clear</i> – All the existing version of the item in the language that you specify are replaced by the new versions.</li> <li>• <i>Append</i> – item versions from the package are added on-top of the existing versions of the item. This preserves the history, but gives a higher number to the new package version than the existing version number. A user can merge information between versions afterwards.</li> <li>• <i>Merge</i> – if there is a version with the same number in the item, the Installation Wizard will overwrite it, otherwise a new version with the specific number is added. This makes it possible to replace specific versions of items.</li> </ul>
<b>Skip</b>	Items with the same ID from the target installation will remain unchanged; items from the package will be skipped.

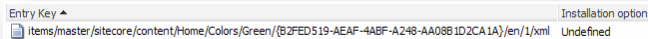
Field Name	Description
<b>Ask User (default)</b>	<p>A prompt window will appear if items with the same ID are found:</p> 

## Preview



In the **Preview** tab, you can see what is included in the current source.

When you select the **Preview** tab for the first time, it is empty. If you click **Lookup**, the list field shows all of the items that the currently selected source will include in the package. The items are presented in the following way:



```
path / ID / language / version /xml
```

The XML marker at the end means that this is an item, not a file.

The *Installation options* column shows the installation options defined for the source.

You can search for the items which contain a particular string in their entry key by using the **Search for key** field.

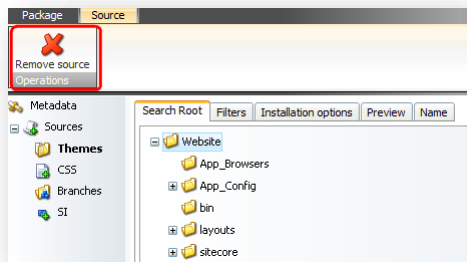
### Note

Wildcards are not allowed.

## 3.1.2 Editing Dynamically Added File Sources

You can edit the dynamic file sources that you created.

To edit a dynamic file source, click the source file that you want to edit. The **Source** tab is displayed to the right of the package tab.

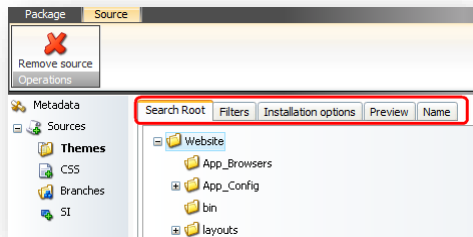


## Removing the Source

To remove the whole source, click **Remove source**.

## Editing the Source Files

On the **Source** tab, a set of tabs is displayed on the right-hand side of the dialog box.



In the **Search Root** tab, you can change the folder in the root item, from which your source files will be dynamically taken.

In the **Filters** tab, you can change filtering options. For more information about the **Filters** tab, see section *Filters*.

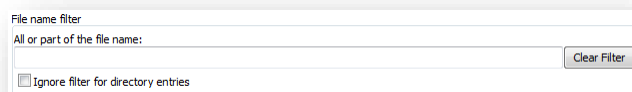
In the **Installation options** tab, you can change the installation options. For more information about installation options, see section *Installation*.

In the **Preview** tab, you can view what will be included in the current source. For more information about the Preview tab, see section *Preview*.

In the **Name** tab, you can rename the source of the dynamically generated file.

## Filters

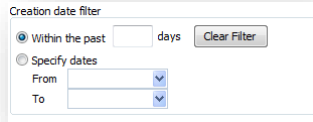
### File name filter



Use the **File name filter** to filter items by name. Select the *Ignore filter for directory entries* checkbox if you don't want to include directories in the search results.



### Creation Date Filter



Use the **Creation date filter** to filter items by their creation date.

**Note**

The *Within the past XX days* function is just a UI convenience; this is not a floating date. When a user enters a number of days, this value is converted to a static date range.

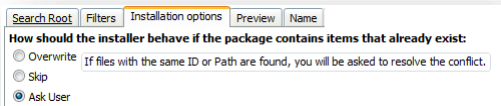
### Modification Date Filter

Use the **Modification Date Filter** to look for the date when the source was modified.

The **Modification Date Filter** is the same as the **Creation Date Filter**, but in this case the modification dates are used.

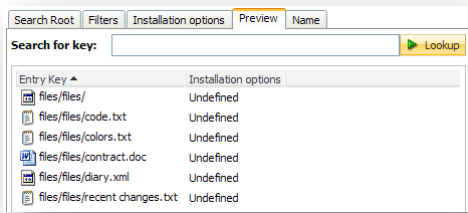
### Installation Options

On the **Installation options** tab, you define how the system acts if the file being installed already exists in the target installation.



Field Name	Description
<b>Overwrite</b>	The file in the target installation is replaced by a file from the package.
<b>Skip</b>	The file in the target installation remains unchanged; the file in the package is skipped.
<b>Ask User (default)</b>	A dialog box appears if identical files are found. <div style="text-align: center;"> </div>

## Preview



On the **Preview** tab, you can see what is included in the current source.

When you select the **Preview** tab for the first time, it is empty. Don't type anything in the *Search for key* field yet, and click **Lookup**. A list of files of the currently selected source with filters applied in the *Entry Key* column is displayed.

The *Installation options* column shows the installation options that are defined for the source.

You can search for files that contain a particular string in their entry key by using the *Search for key* field.

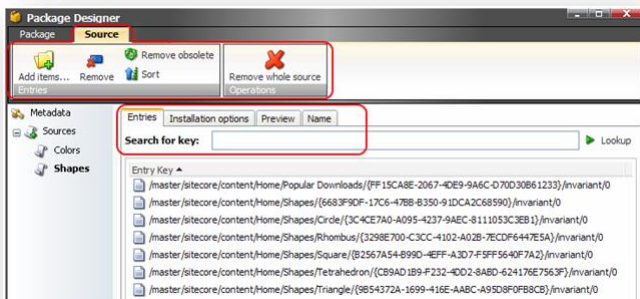
### Note

For this search, wildcards are not allowed.

### 3.1.3 Editing Statically Added Item Source

You can edit the static item sources that you created.

To edit a static item source, click the source item that you want to edit. The **Source** tab is displayed to the right of the package tab.



### Removing the Source

To remove the whole source, on the **Source** tab, in the **Operations** group, click **Remove whole source**.

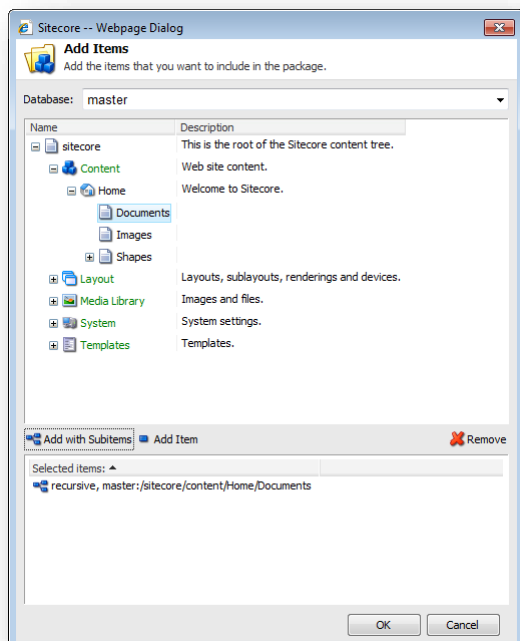
### Editing the Source Items

You can edit the source items on the **Source** tab, in the **Entries** group.

On the **Source** tab, a set of tabs is displayed on the right-hand side of the dialog box.

## Adding Items

To add an item to the source, click **Add items** to open the **Add Items** dialog box.



In this dialog box, select the item that you want to add and click **Add with Subitems** or **Add Item**.

## Removing items

To remove an item from the source, select an entry in the **Entry Key** list and click **Remove**.

## Removing obsolete items

To remove references to items that have been removed from the installation, click **Remove obsolete**.

## Setting Installation Options

You can set installation options to define what to do if the item that is being installed already exists in the target installation. The items are compared by their ID. For more information about installation options, see the *Installation Options* section.

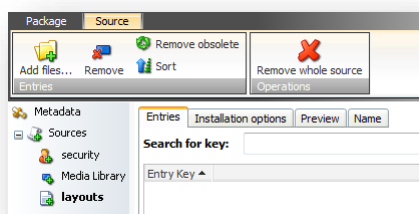
## Renaming the source

To rename the source, on the **Name** tab, in the Source name field enter the new name.

### 3.1.4 Editing a Static File Source

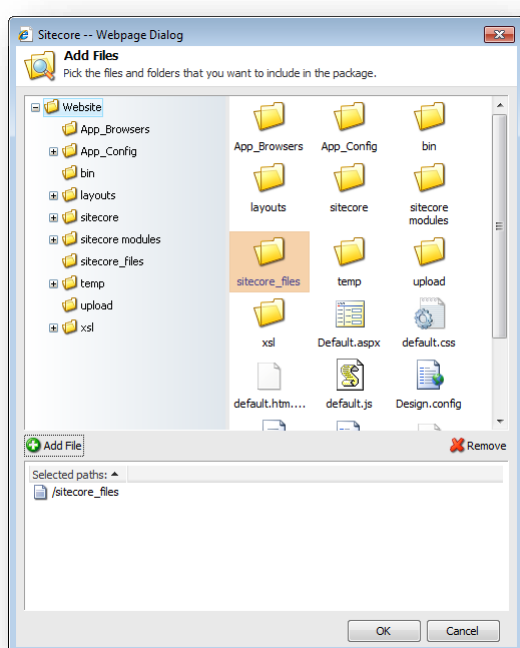
You can edit the static file sources that you created.

To edit a static file source, click the source file that you want to edit. The **Source** tab is displayed to the right of the package tab.



To remove the whole source, on the **Source** tab, in the **Operations** group, click **Remove whole source**.

To add a file to the source, click **Add files** to open the **Add Files** dialog box.



In this dialog box select the folder from where you want to add files and click **Add File**.

To remove a file from the source, select an entry in the **Entry Key** list and click **Remove**.

To remove references to files that have been removed from the installation, click **Remove obsolete**.

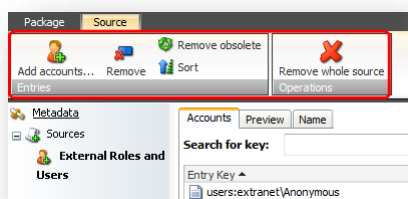
You can set installation options to define what to do if the file that is being installed already exists in the target installation. The files are compared by their ID. For more information about installation options, see the *Installation Options* section

To rename the source, on the **Name** tab, in the **Source name** field enter the new name.

### 3.1.5 Editing a Security Account Source

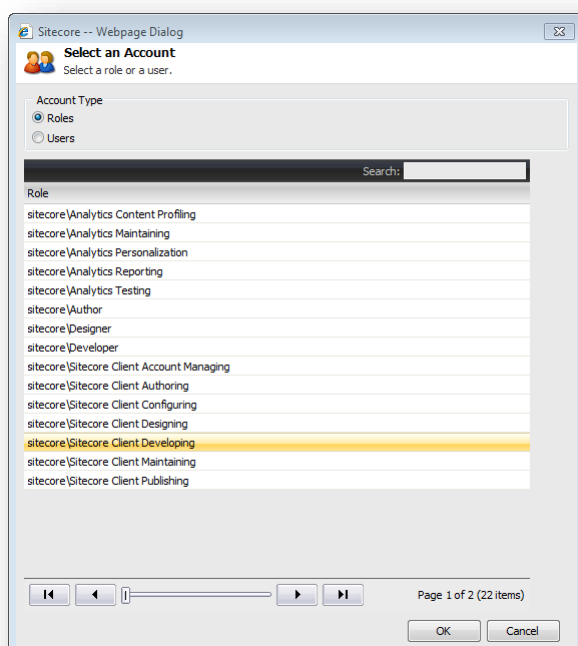
You can also edit any security account sources that you created.

To edit a security account source, click the source item that you want to edit. The **Source** tab is displayed to the right of the package tab.



To remove the entire source, click **Remove whole source**.

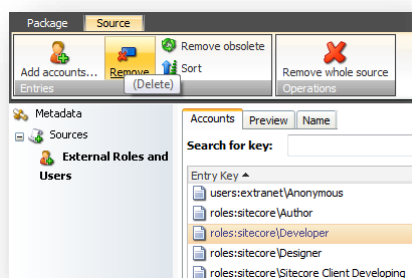
To add an account to the source, click **Add account** to open the **Select an account** dialog box.



For more information about how to add roles or users to the security accounts source, see section *Adding a Security Account to a Source*.

To remove a role or a user from the source:

1. Click the source in which you want to remove a role or a user.
2. On the **Accounts** tab, in the **Entry key** section, click the role or the user that you want to delete. On the **Source** tab, click **Remove**.



You can remove references to the roles or users that have been removed from the installation. To do so, click **Remove obsolete**.

You can sort roles and users alphabetically. To sort roles and users, click **Sort**. Inverted sorting order is not available.

### **Previewing the security accounts**

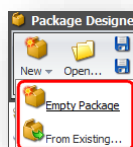
You can preview the content of the security accounts source. To do so, click the **Preview** tab in the right-hand pane.

## 3.2 Modifying an Existing ZIP Package

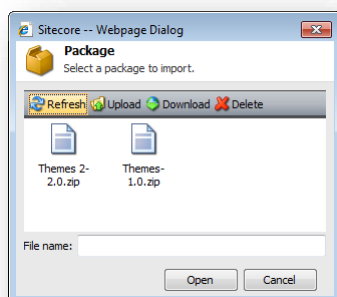
You can change the content of a package that you archived. The Package Designer will automatically extract the content of the package and turn it into an XML project. You can then modify the metadata and sources of this XML project.

To modify an existing ZIP package:

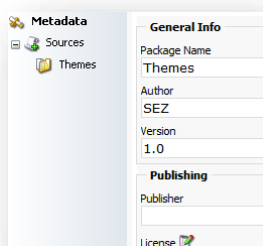
1. In the **Project Designer**, in the **Project** group, click the small triangle under **New** and a list of options is displayed.



2. Select the **From existing** option. The **Package** dialog box with the existing ZIP packages is displayed.



3. Select the package you want to modify and then click **Open**. The *Metadata* and the content of the *Sources* section are displayed.



4. Now you can add, edit, or delete the entire sources or the files, items, security accounts in these sources.
5. After you make changes to the package, click **Save/Save As**.

### Note

Clicking **Save** or **Save As** saves your package as an XML file. However, you will need to create a ZIP archive of the XML file, if you want to export or install the package. For more information about how to create a ZIP archive of the package, see the section *Creating a ZIP Archive of an XML Project*.

## Chapter 4 Installing a Sitecore Package

This chapter explains how to install a Sitecore ZIP package that was created with the Package Designer.

The chapter consists of the following sections:

- Installing a Package

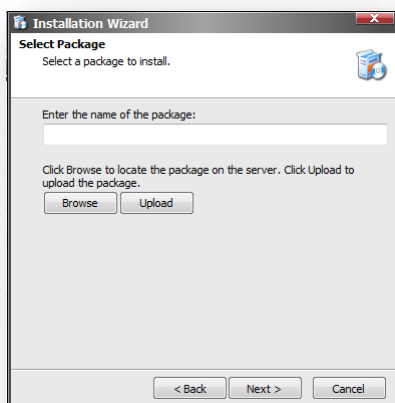


## 4.1 Installing a Package

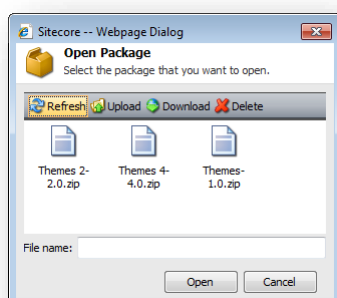
After you created the package, you may want to test it to find out if the package that you created is created correctly and contains all the items that you specified.

To install the package:

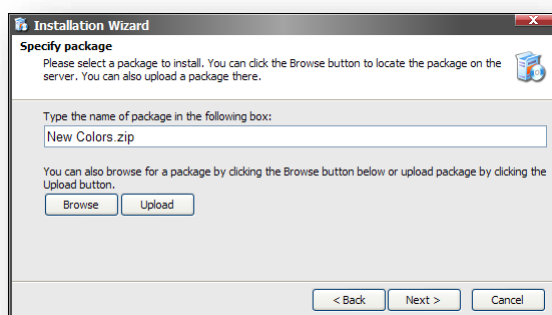
1. In the **Package Designer**, in the **Install** group, click **Launch Wizard**. The **Installation Wizard** is displayed.
2. In the **Select Package** dialog box, click **Browse**.



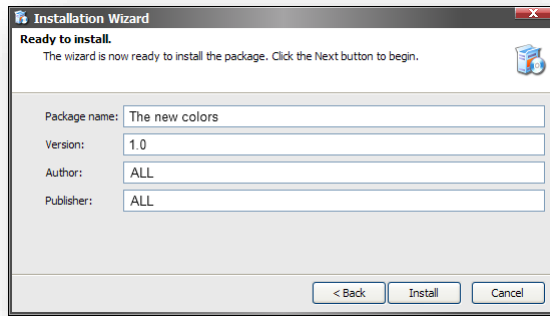
3. The **Open Package** dialog box appears.



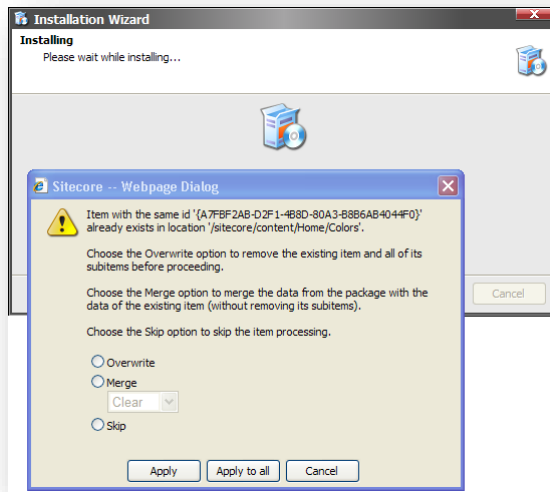
4. In the **Open Package** dialog box, click the ZIP package you want to install. Click **Open**. The selected package appears in the **Specify package** dialog box.



- In the **Specify package** dialog box, click **Next**. The **Ready to install** dialog box is displayed.



- Review the package information and click **Install**. The Installation process begins.

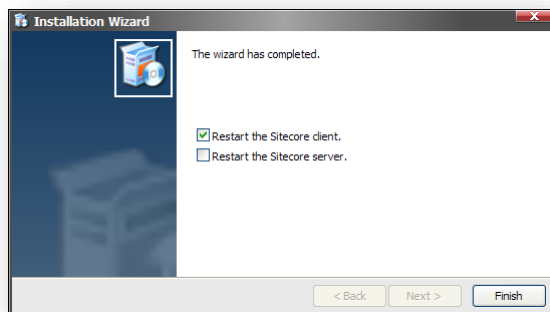


If there are items with the same ID in the package and in the target installation, you see a webpage dialog in which you can choose how to resolve this issue. The collision is resolved automatically if the **Installation options** were set for the items during the package creation.

**Note**

If a parent for an item that you are installing with the package does not already exist, it is created. The new parent item is based on the *Folder* template and does not contain any fields.

- If you did not define the **Installation options** when you create the package, click either **Apply** or **Apply to all** to proceed with the installation. The final dialog box is displayed.



8. Select the *Restart the Sitecore client* check box to restart the Sitecore client, and then click **Finish**.

**Note**

The passwords of the users who are transferred are changed randomly. As a result, these users become locked. After you install the package, you must modify the settings of the transferred users: change the users' passwords and unlock the users.

## Chapter 5

# Administrator's Notes

This section contains some notes concerning Package Designer functionality.

### Package folder location

Sitecore stores ZIP packages in the folder that you can specify in the `web.config` file, in the following setting:

```
<setting name="PackagePath" value="$(dataFolder)/packages" />
```

### System Items

We recommend that you do not set the **Overwrite** installation option for critical system items, such as database sections — content, layouts, templates, masters, and so on — and system items such as, system/languages, system/workflows, and so on.

### Special Characters

If a package contains items with names which don't meet the item name rules, the installer will create these items without any warnings.

If you include items with names that do not meet the item name rules, the installer process these items normally. When the installation is completed, you might need to rename those items before you can work with them.

### Specifying the Post Step

You can specify a post step action that is performed at the end of the installation process.

Use the following signature in the Post Step field of the Metadata section:

```
<Namespace>.<Class name>, <Assembly name>
```

For example: `MyCompany.CustomPostStepAction, MyAssembly`

The `MyCompany.CustomPostStepAction` class must implement one of the following approaches:

1. Implement the `Sitecore.Install.Framework.IPostStep` interface from the `Sitecore.Kernell` assembly.

According to the `IPOstSteps` Interface, implement the method with the following signature:

```
public void Run(ITaskOutput output, NameValueCollection metaData);
```

Parameters:

- o output

Type: `Sitecore.Install.Framework.ITaskOutput`

The instance of the basic methods to work with UI in another thread:

- o metadata

Type: System.Collections.Specialized.NameValueCollection

Collection with project metadata values, such as Attributes, Author, Comments, License and etc.

2. Implement a method that will perform post step action with the following signature:

```
public void RunPostStep()
```