

# Sitecore CMS 7.2 Content Author's Reference and Cookbook

A Conceptual Overview and Practical Guide to Using Sitecore



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# **Chapter 1**

# Introduction

The Content Author's Cookbook is designed to give content authors the information they need so that they can use Sitecore CMS to perform their day to day work. This cookbook is primarily aimed at introducing new content authors with limited computer skills to the tools that Sitecore contains. However, the procedures described in this document will also be beneficial for more experienced and technically skilled content authors who are unfamiliar with the tools that Sitecore contains.

Content authors must be able to update existing content on their corporate website or intranet as well as create new material. This cookbook explains how to perform both these tasks with the two editing tools that Sitecore contains — the Page Editor and the Content Editor — and demonstrates how to edit existing items and create new items with both of these tools. The cookbook also introduces some of the more advanced features and functionality that Sitecore contains.

This Content Author's Cookbook contains the following chapters:

• Chapter 1 — Introduction

This chapter is a description of the content, aims, and the intended audience of this manual.

- Chapter 2 Sitecore
   This chapter is an introduction to basic Sitecore functionality including item locking
   and formatting.
- Chapter 3 Managing Content in the Page Editor
   Step by step instructions for using the Page Editor to create and edit content.
- Chapter 4 Managing Content in the Content Editor
   Step by step instructions for using the Content Editor to create and edit content.
- Chapter 5 The Rich Text Editor Step by step instructions for editing text and links using the Rich Text Editor.
- Chapter 6 Item Buckets
   Step by step instructions for creating and using Item Buckets.
- Chapter 7 Searching in Sitecore Step by step instructions for using the search functionality in Sitecore.
- Chapter 8 The Media Library Step by step instructions for using the Media Library.
- Chapter 9 RSS Feeds Step by step instructions for creating RSS feeds.

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- Chapter 10 Workflows for Content Editors Step by step instructions for creating and using workflows.
- Chapter 11 Customizing the Interface Step by step instructions for customizing the Sitecore interface.



# Chapter 2

# Sitecore

This chapter introduces some of the basic Sitecore functionality. This chapter explains how to log in, how item locking works, and describes how roles affect the functionality that is available to you in Sitecore CMS.

This chapter contains the following sections:

- Logging In
- Roles and Functionality
- Item Locking
- Formatting
- Publishing



# 2.1 Logging In

You must log in to Sitecore before you can edit any of the content on a website.

To log in to Sitecore:

1. Enter Sitecore after the name of your website, for example http://www.mywebsite.net/sitecore and the Log in page appears.

Welcome to Sitecore	License Holder: Sitecore Corporation A/S License ID: 20111108023919
User Name: admin Password: Remember me  Login	Silecore NET 7.1 (rev. 130907)
Forgot Your Password Change Password	Browser Notes
Options ser Interface: Desktop Content Editor Page Editor Launch Pad	You are running Internet Explorer 10 in Compability View mode. Sitecore does not fully support this browser. You may experience some problems.
ser Interface Language:	
Close Options	

2. Select the user interface that you want to use, enter your user name and password, and click **Log in** to log in and to start working on the website.

#### Note

There are no applications available from the Launch Pad until you have manually installed them.

#### **Configuring Sitecore on Internet Explorer**

If you have any problems configuring your Sitecore client on Internet Explorer, see the *Internet Explorer Configuration Reference* manual.



# 2.2 Roles and Functionality

Sitecore contains tools that are suited to both experienced and inexperienced content authors. The Content Editor is the editing tool for experienced users. However, depending on the roles you have been assigned, the functionality that is available to you may differ from the functionality described in this guide.

For example, a user who has been assigned one set of roles may see the following ribbon in the Content Editor.

9)	Home	Publish	Versions	Configure	Presentat	ion	Security	View	
	722		Us Section	(1 of 9)	- <u>x</u>		📣 Up	🙊 First	
ive	Edit -	Contac	ct Section	(2 of 9)	▼ Delet	e	💙 Down	😻 Last	
rite	Edit	Insert 🕫			Oper	ations	Sorting To	and the second second	

While a user who has been assigned another set of roles may see much more functionality in the **Content Editor** ribbon.

	Home	Navigate Reviev	/ Publish \	ersions Co	nfigure Pre	sentation	Security	/ View	Developer		
H	1	About Us Section	(1 of 10)		🎲 Сору То	2	Ê	🥪 Cut	T Rename	📣 Up	🙊 First
Save	Edit 👻	Contact Section	(2 of 10)	Duplicate	🔂 Move To	Delete 👻	Paste	Copy	T Display Name	💙 Down	😻 Last
Write	Edit	Insert 🕫		Operation			Clipboar		Rename	Sorting To	

Furthermore, when you log in to the Sitecore Desktop, the set of applications shown in the Sitecore menu also depends on the roles that have been assigned to you. The following screenshots show the Sitecore menu for two users with different sets of roles:

Lonnie L			Content Editor Manage your content.	Page Editor	
sitecore Vonnie			Media Library Maintain media content.	Tebug	
Content Editor Manage your content.	Page Editor	3	Developer Center Create new functionality.	A Carousel	
Media Library Maintain media content.	Carousel	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	Template Manager Create new templates.	🥑 Recycle Bin	
	Recycle Bin		·	Search	
	Search			Workbox	
	🧐 Workbox			Control Panel	
	S Control Panel		II Applications	Development Tools	
All Applications	Reporting Tools	•		Reporting Tools	
	🧖 Log Of	ff		🎀 և	og Of



## 2.3 Item Locking

Sitecore uses item locking to ensure that two different users cannot edit the same item at the same time.

#### Note

A content administrator might have the authority to edit another user's locked items. So if it happens that a content administrator and another user manage to edit the same item simultaneously, only the changes that are made by the user who clicks **Save** last will be available. If a user saves changes to an item, and another user saves changes to the same item afterwards a message box does appear, asking if the user wants to overwrite previously saved changes to the item.

You lock the item that you are editing to prevent other users from editing this item at the same time. You unlock it again after you have finished editing the item.

Item locking works differently depending on the tools that you are using:

- In the **Page Editor**, you *can* lock an item before you start to edit it.
- In the **Content Editor**, you *must* lock an item before you can edit it.

## 2.3.1 Item Locking and Publishing

Be aware that locking an item does not keep it from being published. If you are working on an item and you want to keep it from being published you need to set the publishing restrictions for the item. This can only be done from the Content Editor.

To restrict an item from being published:

- 1. In the content tree, navigate to the item you want to restrict from publishing.
- 2. Click the **Publish** tab and, in the **Restrictions** group, click **Change** to open the publishing settings for the item.
- 3. Clear the **Publishable** check box for the version of the item that you do not want published and click **OK**.



# 2.4 Formatting

In Sitecore, the formatting of the content that is displayed on a website is generally controlled by the style sheets that have been defined for the website by the administrators, designers, programmers, and so on.

This means that as a content author, you do not have to worry about how the material you are responsible for is presented to the reader and can concentrate on the quality of the material.

You can influence the style by making some text bold or italic and so on. Furthermore, if you know how to write HTML code, you can edit the code and thereby influence the way that the content is presented. In general, you can concentrate on the material that is presented and ignore the way that it is formatted.



# 2.5 Publishing

When you edit or create new items in Sitecore, they must be published before they appear on your website. This allows you to save unfinished items and decide precisely when the items are launched to the website.

When you work in Sitecore, the items you save are saved to the Master database. When you publish items, the items are copied from the Master database to a publishing target and from the publishing target, the website is launched. The default publishing target in Sitecore is the Web database.

When you publish a new item, you can choose to publish the entire website or a single item:

- **Site publishing** publishes your entire website starting from the root of the content tree. You can publish a site from the Content Editor or from the Sitecore Desktop.
- **Item publishing** publishes the item you select in either the Content Editor or the Page Editor. The item can only be published if all its ancestors have been published. With item publishing, you can choose to include all of the selected item's sub items and related items.

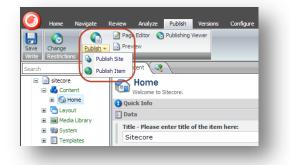
When you are ready to publish a website or an item, you can run the publishing wizard, which guides you through the steps of publishing in Sitecore.

## 2.5.1 Site Publishing

To publish the entire website:

1. Open the Publish Wizard from one of two locations in Sitecore:

**Content Editor**: On the **Publish** tab, in the **Publish** group, click the **Publish** drop-down arrow, and select **Publish Site**.





Sitecore Desktop: Click the Sitecore Start button, and then click Publish Site.



2. In the **Publish Wizard**, on the **Settings** page, specify the publishing mode for the website you are publishing.

Settings Select the publishing settings. Click P	Publish to publish.	
Publishing		
Incremental Publish - Publish Only	Changed Items.	
Smart publish - Publish Differences	Between Source and Target Datab	ase.
Republish - Publish Everything.		
-Publishing Language		(
Select all		
Danish		
🕑 English		
German (Germany)		
Cloud (web) Internet (web)		
	< Back Publish	> Cancel

**Incremental Publish** – publishes only items that are in the publishing queue. Every time you change an item, the item is automatically added to the publishing queue. If the changed item is part of a workflow, the item is added to the publishing queue when it reaches the final workflow state.

Incremental Publish is the fastest way of publishing because Sitecore does not use resources on comparing versions of the items that are in the publishing queue before publishing them.



#### Note

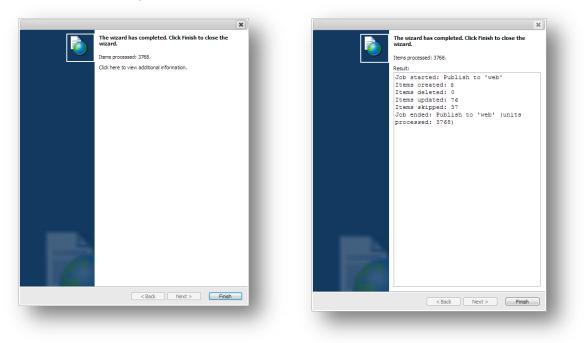
Incremental Publish is only available when you publish the entire website.

**Smart Publish** – publishes all items that have changed since the last publication. When you run a Smart Publish, every item in the Master database is compared with the equivalent item in the target database, and if an item has changed, it is published

Comparing all items in the database makes this a time-consuming way of publishing your entire website, particularly if the content tree contains many items.

**Republish** – publishes everything. Republish overwrites every item in the target database with the equivalent item from the Master database, even if it has not changed. In this way, republishing removes all obsolete versions from the target database. You can use republishing to:

- Bring a new web database online.
- Restore a backup of the master database.
- o Add a new content language, a new publishing target, or other system items.
- 3. In the **Publish Language** section, specify the language versions that you want to publish.
- 4. In the **Publishing Targets** section, specify the publishing targets that you want to publish to.
- 5. Click **Publish.** When the publishing completes, you can see how many items were processed during publishing. To see a detailed result of the publishing, such as the number of items created, deleted, or updated, click the link *Click here to view additional information*.



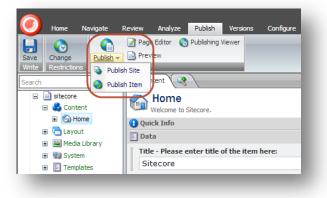
## 2.5.2 Item Publishing

To publish a single item:

1. Open the **Publish Item Wizard** from one of two locations in Sitecore:



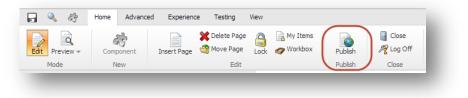
• **Content Editor**: Select the item that you want to publish. On the **Publish** tab, in the **Publish** group, click the **Publish** drop-down arrow, and select **Publish Item**.



#### Note

To publish the selected item in all languages to all publishing targets and avoid going through the steps of the **Publish Item Wizard**, click the icon on the **Publish** button.

• **Page Editor**: navigate to the page that you want to publish, and on the **Home** tab, in the **Publish** group, click **Publish**.





2. In the Publish Item Wizard, on the Settings page, specify the publishing mode:

Settings Select the publishing settings. Click	Publish to publish.	)
-Publishing		1
	es Between Source and Target Database.	
Republish - Publish Everything.	s between boarde and harger boabbaber	
Publish Subitems		
Publish Related Items		
Publishing Language		7
Select all		
Danish		
🕑 English		
German (Germany)		
Publishing Targets Cloud (web) Internet (web)		20
	< Back Publish > Cancel	]

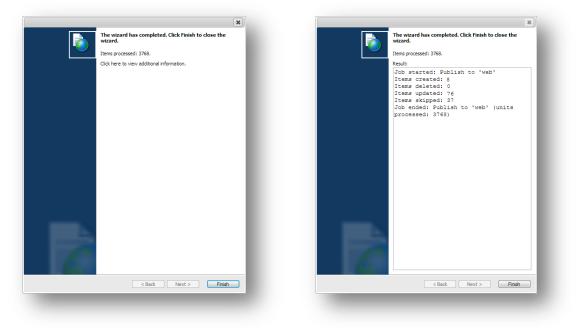
**Smart Publish** – publishes the selected item if it has changed since the last publication. When you run Smart Publish, the selected item in the Master database is compared with the equivalent item in the target database, and if the item has changed, it is published. When you are publishing single items, Smart Publish is a quick way to make sure that all changes to a specific item and its subitems are published.

**Republish** – publishes everything. Republish overwrites the selected item in the target database with the equivalent item from the Master database – even if it has not changed. In this way, all obsolete versions are removed from the target database. You can use republishing to:

- Restore a backup of the master database.
- Add a new content language, a new publishing target, or other system items.
- 3. To publish all the subitems of the selected item, select **Publish Subitems**.
- 4. To publish all the related items to the selected item, select **Publish Related Items**. Related items can be:
  - o Clone references items that are clones of the selected item.
  - o Media references media items that are related to the selected item.
  - Alias references items that are aliases of the selected item.
- 5. In the **Publish Language** section, specify the language versions that you want publish.
- 6. In the **Publishing Targets** section, specify where you want to publish the items to.



7. Click **Publish**. When the publishing completes, you can see how many items were processed during publishing. To see a detailed result of the publishing, such as the number of items created, deleted, or updated, click the link *Click here to view additional information*.



## 2.5.3 Setting up Publishing Restrictions

In Sitecore, you can restrict the publication of items using publishing restrictions. Publishing restrictions let you specify that a specific item or a version of an item is publishable or unpublishable either within a specific date range or indefinitely. This lets you control which items and pages are available for publishing at any given time.

For example, if you have set up Sitecore to periodically publish your entire site to make sure it is always up to date, you can create publishing restrictions on the items that you do not want to publish. This can be items that are still being created or finished items that you only want to publish when a certain campaign is rolled out. With publishing restrictions, you can easily manage if and when items are published, so that only the appropriate items are published.

## Publishing Restrictions for a Single Version of an Item

To set up publishing restrictions for one or more versions of an item:

- 1. In the Content Editor, select the item that you want to set up publishing restrictions for. Make sure that you select the appropriate language version of the item.
- 2. Click the Publish tab and in the Restrictions group, click Change.



In the **Publishing Settings** dialog box, on the **Versions** tab, the item versions in the current language are listed. By default, each version is publishable. If an item is not publishable, it is

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not published, even if you publish the entire website.

Restrict the publication of one or more versions of the current linem. This only affects the current language.     Version Publishable From     1.     I.     I. <th></th>	
. 🗹 1/20/2014 🛛 3:00 PM 🗹	

#### Note

Even if you have set an item as publishable in the **Publishing Settings** dialog, and if the item is in a workflow, the item is not publishable until it reaches the final workflow state.

- 3. To make the specific item version publishable, select the **Publishable** check box. To make the item version not publishable, clear the **Publishable** check box.
- 4. To specify a period for when the item version is publishable, select the **Publishable** check box, and then enter the dates and times in the **Publishable From** and **Publishable To** fields. You can choose to specify only the start date, the end date, or leave all the fields blank, in which case the item version is publishable from the current day until you change it.
- 5. When you are done setting up the publishing restrictions, click **OK**. In the Content Editor, a warning appears in the content area for the item informing you or other content editors that restrictions are set up for this item.

0	Home I	Navigate	Review	Analyze	Publish	Versions	Configure	Presentation
Save Write	Change Restrictions	Publish <del>-</del> Publish	-	e Editor 🛛 💽 view	Publishing	Viewer		
Search		Q	-	Content	3/			
8 (			2	Hom Welcome	e to Sitecore.			
	🖃 🙆 Hon	ne My test item		Publishing i	is restricte	d for this ite	em.	
G	-	20	•	Quick Info				
9	_			Item ID:	{110D559	-DEA5-42EA	-9C1C-8A5DF7	E70EF9}
E	🗑 🔛 System	1		Item Name:	Home			overences/c I.

After you have set up the publishing restrictions for your items, you can preview your website in the Page Editor to make sure that you have set up everything correctly. In the Page Editor, you can browse through the pages on your website and see how they look on upcoming dates or in different languages. For information on how to preview your website, see the section *Previewing Pages*.



## Publishing Restrictions for all Versions of an Item

To set up publishing restrictions for every version and in every language for an item:

- 1. In the Content Editor, select the item that you want to set up publishing restrictions for. Make sure that you select the appropriate language version of the item.
- 2. Click the **Publish** tab and in the **Restrictions** group, click **Change**.



3. In the **Publishing Settings** dialog, click the **Item** tab.

sions Item Target	20 1 1 1 1 1 1 1 2 1 1 2 1 1 1 2 1 1 2 1 1 2 1 1 2 1 1 2 1 1 2 1 1 2 1 1 2 1						Ē
strict the publication of	the current item. T	his affe	cts every ver	sion in ever	y language.		
Publishable		-		-			
Publishable From:	1/23/2014	~	1:00 AM	~			
Publishable To:	1/31/2014	~	1:00 AM	~			

4. To specify all the item versions as publishable, select the **Publishable** check box. To specify all the item versions as not publishable, clear the **Publishable** check box.

#### Note

If you clear the **Publishable** check box, this affects the item versions listed on the **Versions** tab. This means that if you specify an item as not publishable, you cannot make a version of that item publishable.

5. To specify a period for when the item version is publishable, enter the dates and times in the **Publishable From** and the **Publishable To** fields. You can choose to specify only the start date, the end date, or leave all the fields blank, in which case the item is publishable from the current day until you change it.

#### Important

If you specify a date range for when an item or item version is publishable, it does not mean that the item is published on the start date and removed again on the end date. Instead it means that the item is available for publishing and included if and when you publish that item or the entire website. To make an item appear on the website on the start date and removed again on the end date, you must run the **Publish Item** wizard on both days.

6. To restrict the item to be published only to certain publishing targets, select the appropriate publishing targets on the **Targets** tab. This applies to all versions of the item and all languages. If you do not specify a publishing target for the item, the item can be published to



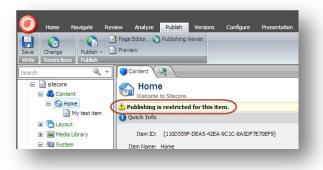
any publishing target you choose in the Publish Wizard.

ersons item   largets   ndicate the publication destinations for the current item. This affects every version in every language. —Publishing targets	Configure how the current item is published.	
-Publishing targets	ersions I Item Targets	affacts avery version in every language
∉ Embargo ∉ QA		inces every version in every language.
Web	2 QA	
	iii Web	

#### Note

The list of publishing targets contains both regular publishing targets and preview publishing targets. For more information on preview publishing targets, see the section *Creating Preview Publishing* Targets.

7. When you are done setting up the publishing restrictions, click **OK**. In the Content Editor, a warning appears on the **Content** tab of the item that informs you or other content editors that restrictions are set up for this item.



After you have set up the publishing restrictions for your items, you can preview your website in the Page Editor to make sure that you have set up everything correctly. In the Page Editor, you can browse through the pages on your website and see how they look on upcoming dates or in different languages. For information on how to preview your website, see the section *Previewing Pages*.

## 2.5.4 Creating Preview Publishing Targets

By default, items that are in a workflow can only be published if the items are in the final workflow state. However, in situations where you need to publish an item before it reaches the final workflow state, for example, if you want the item to be reviewed by a non-Sitecore user, you can publish the item to a preview publishing target.

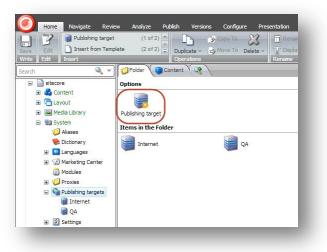
A preview publishing target is a publishing target that you can assign to one or more workflow states to allow items in that workflow state to be published. When you publish to a preview publishing target, all items that are in a workflow state with this preview publishing target assigned *and* all items that are in a final workflow state of any workflow are published.



In this way, items that are not in the final workflow state (and therefore cannot be published) can be published to an internal site for review or they can be published to a secure site with early release material that only certain partners or customers can access.

To create a preview publishing target:

- 1. In the content tree, click to expand **System**, and then select **Publishing Targets**.
- 2. To create a new publishing target, on the **Folder** tab, in the **Options** section, click **Publishing** target.



- 3. In the system dialog that appears, enter the name of the preview publishing target and click **OK**.
- 4. On the **Content** tab for the new publishing target, enter the name of your target database and select **Preview publishing target**.

#### Important

Make sure that the name of the target database is entered correctly to avoid getting an error when you try to publish to the preview publishing target.

Embargo	_
Quick Info	٠
Data	Ξ
Target database [shared]:	
web	
Preview publishing target - This publishing target can be assigned to workflow states that are not the final st	ate:

#### 5. Click Save.

To allow items in a workflow state to be published to a preview publishing target:

- 1. In the content tree, click to expand **System**, **Workflows**, and then select the workflow state that you want to assign a preview publishing target to.
- 2. In the **Data** section, select one or more preview publishing targets to assign to this workflow state. The list contains only the publishing targets that are specified as preview publishing

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targets.

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	Preview publishing targets - Items in this workflow state can be published to the selected preview publishing targets
Modules	Preview publishing targets - Items in this workflow state can be published to the selected preview publishing targets even though this state is not the Final workflow state:
<ul> <li>Modules</li> <li></li></ul>	Preview publishing targets - Items in this workflow state can be published to the selected preview publishing targets even though this state is not the Final workflow state:  Embargo
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<ul> <li>Modules</li> <li>Image: Section 2 (1)</li> <li>Proxies</li> <li>Image: Section 2 (1)</li> <li>Sectings</li> </ul>	Preview publishing targets - Items in this workflow state can be published to the selected preview publishing targets even though this state is not the Final workflow state:  Embargo
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<ul> <li>Modules</li> <li>♥ Proxies</li> <li>♥ Publishing targets</li> <li>♥ Settings</li> <li>♥ Tasks</li> <li>♥ Toolbox</li> <li>♥ Toolbox</li> <li>♥ Analytics Testing Workflow</li> </ul>	Preview publishing targets - Items in this workflow state can be published to the selected preview publishing targets even though this state is not the Final workflow state:  Embargo
Modules  Mo	Preview publishing targets - Items in this workflow state can be published to the selected preview publishing targets even though this state is not the Final workflow state: Embargo QA
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<ul> <li>Modules</li> <li>✓ Proxies</li> <li>✓ Proxies</li> <li>✓ Publishing targets</li> <li>✓ Settings</li> <li>✓ Tasks</li> <li>✓ Toolbox</li> <li>✓ Workflows</li> <li>✓ Analytics Testing Workflow</li> <li>✓ Analytics Testing Workflow</li> <li>✓ Analytics Workflow</li> <li>✓ Damber Workflow</li> </ul>	Preview publishing targets - Items in this workflow state can be published to the selected preview publishing targets even though this state is not the Final workflow state: Embargo QA
Modules       Image: Constraint of the state of the stat	Preview publishing targets - Items in this workflow state can be published to the selected preview publishing targets even though this state is not the Final workflow state: Embargo QA

3. Click Save.

Now, the items, that are in a workflow state with the preview publishing target assigned, appear with a notification to let you know which preview publishing targets the specific item can be published to.

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t in the final workflow step.
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#### Note

When you publish to a preview publishing target, any publishing restrictions that are set up on the items are still valid.

For more information on publishing restrictions, see the section *Setting up* Publishing Restrictions.

For more information about workflows, please see the section Workflows for Content Editors.



# **Chapter 3**

# Managing Content in the Page Editor

This chapter introduces the Page Editor and the functionality it contains. It contains detailed descriptions of how to edit an existing item including how to edit simple text fields and rich text fields. There is a description of how to manage images in the Page Editor. There are also detailed instructions on how to create new items.

This chapter contains the following sections:

- The Page Editor
- Editing an Item in the Page Editor
- Searching in the Page Editor
- Previewing Pages
- Creating a New Item in the Page Editor
- Deleting Content



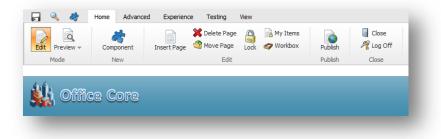
# 3.1 The Page Editor

Content authors are generally focused on the quality and accuracy of the material displayed on the website rather than on the design, style, and layout of the site. For this reason most content authors prefer to work in a program that is designed to meet their needs rather than those of the developers and designers who create the websites.

With this mind, Sitecore CMS allows content authors to edit and create items directly on the web page with the Page Editor. The Page Editor is the simplest of the editing tools that Sitecore provides. It is designed for inexperienced content editors who edit and write content items directly on the page. It is a WYSIWYG editor (what you see is what you get) that allows you to see the changes that you make directly on the page. Furthermore it limits the amount of functionality that is presented to the user.

When you log in to the Page Editor, the functionality that is available to you vary, depending on the security roles that you have been assigned and the customizations that have been carried out on the website that you are accessing.

When you log in to the Page Editor, the ribbon is displayed at the top of the web page. If you have been given full access to all functionality in the Page Editor, you have access to all five tabs in the ribbon, each with its own collection of commands.



As a minimum, you can expect to see the buttons shown in the following screenshot at the top of the web page.



Regardless of the ribbon that you use, there is always a Save button in the top-left corner.

When you are editing an item, you can click the **Toggle Ribbon** button A to temporarily hide the ribbon to give yourself some more space to work with or to view a less confusing layout. Click the **Toggle Ribbon** button A again to display the ribbon.



# 3.2 Locking Items in the Page Editor

Depending on your access rights and the setup of items you have the following options to lock items before editing the content in the Page Editor.

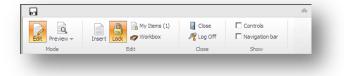
## 3.2.1 Locking in the Limited Page Editor

If you have access to the *Limited Page Editor*, you can edit an item directly on the page without locking it. When you save the item, Sitecore locks it for you. If the item that you want to edit is already locked, you cannot edit it, you can only navigate.

You can click Lock to manually lock an item before editing it.



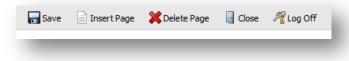
When you lock an item, it is noted in the **My Items** button on the ribbon. In the following screenshot, the user has locked one item:



When you have finished editing the item, remember to unlock it so that other users can edit it.

## 3.2.2 Locking in the Minimal Page Editor

If you only have access to the *Minimal Page Editor*, you do not have access to the ribbon and therefore you cannot manually lock an item before you edit it. If the item that you want to edit is already locked, you cannot edit it, you can only navigate.



If two editors with the same minimal access rights edit the same item, the editor who saves the item last is notified that changes have been made to the item and asked if the changes should be overruled.



# 3.3 Unlocking Items in the Page Editor

Once you are done editing the content in the Page Editor, you must remember to unlock the items that you have locked so that other users can edit them.

## 3.3.1 Unlocking in the Limited Page Editor

To unlock an item via the ribbon, select the item and click **Lock**.

If you have locked and edited numerous items, and maybe lost track of them all, you can see which items are locked by you if you click **My Items** in the **Edit** group.

Views the ite	ems that are locked by you.
Drag a column to thi	is area to group by it. Search:
Name	Path
Case-Studies	/sitecore/content/Home/Case-Studies
Our Rule of Thumb	/sitecore/content/Home/Standard-Items/Sidebars/Texts/Our Rule of Thumb
	Page 1 of 1 (2 items)
	Unlock All Page 1 of 1 (2 items)

The My Items dialog box lists all of the items that you have locked.

To unlock one or more items select them and click Unlock. To unlock all the items, click Unlock All.



# 3.4 Editing an Item in the Page Editor

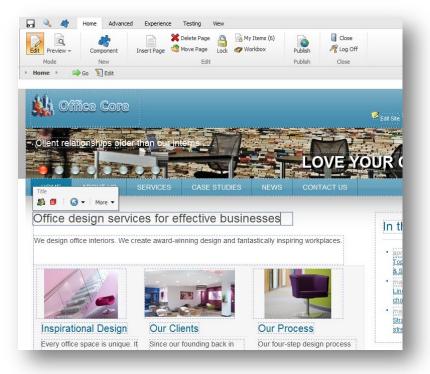
The Page Editor is designed for content authors who want to do their editing directly on the page.

The Page Editor is a WYSIWYG editor that allows you to see the changes that you make directly on the page. This helps the inexperienced users to control the changes that they make to the content items that they are responsible for.

In the Page Editor, you can edit:

- Simple text fields multi-line text fields, date fields and link fields.
- Rich text fields fields that you edit in the Rich Text Editor.
- Word fields fields that you edit in Microsoft Word.
- Media items any kind of graphical item or sound file.

In the Page Editor, you can edit not only the fields of the current item, but also the fields of any items rendered on the page. For instance, if the menu on the page consists of titles of the product items, you can edit the titles without navigating to the product items themselves.



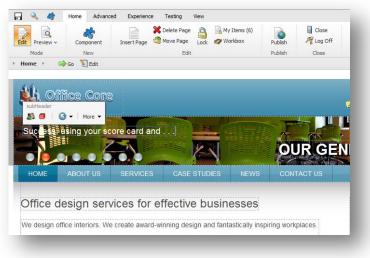
## 3.4.1 Editing a Simple Text Field

To edit a simple text field:

- 1. Log in to the Page Editor.
- 2. Navigate to the item that you want to edit.



3. In the item, select a simple text field that you want to edit.



- 4. Edit the text directly on the page. The text field automatically expands to fit the text you enter.
- 5. When you are finished editing the text, you can start editing another text block or click **Save** to save the changes and exit editing mode. You can also click **Close** to close the item. If you have made any changes on the page, you will see the following prompt dialog box:

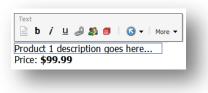
Window	rs Internet Explorer
i	Are you sure you want to leave this page?
	Message from webpage:
	There are unsaved changes.
	Leave this page
	Stay on this page

## 3.4.2 Editing a Rich Text Field Directly on the Page

A rich text field gives you more control over how the text appears on the web page.

To edit a rich text field:

1. Click a rich text field and Sitecore displays your options in a floating menu.



#### Note

The options available in the floating toolbar vary depending on which version of Sitecore CMS you have running and your access rights.

2. To edit the text in the **Rich Text Editor**, click the **Edit Text** button . For more information about the Rich Text Editor, see the section *The Rich Text Editor*.



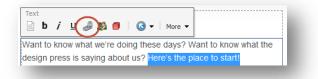
3. To edit the text directly on the page, just click the line that you want to edit and start typing.

When you edit a rich text field directly on the page, you can not only edit the text but also format it. You can make the text bold, italic, and underlined, or insert a link or an image.

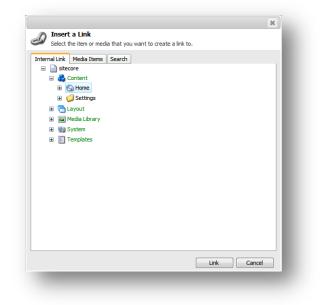
## **Inserting a Link**

To insert a link into a rich text field:

1. Select the text that you want to use as a link and click the Insert Link button 4.



- 2. In the **Insert a Link** dialog box, you can find the item that you want to link to by:
  - Navigating through the content tree on the Internal Link tab.
  - $\circ$  Navigating through the Media Library on the **Media Items** tab to link to an image or media file.
  - Searching for the item on the Search tab.



For more information about the Sitecore search functionality, see the section *Searching in Sitecore*.

3. When you have found the item that you want to link to, click Link.

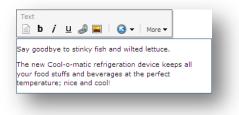
### Inserting an Image

You can insert various types of media into the item. These could be animations, film clips, sound files, and so on.



To insert an image into the rich text field that you are editing:

1. Click the **Insert Image** button .



#### The Insert Media Item dialog box opens.

Insert Media Item Select or search for the Image or media file the Media Library Media	t you want to insert.	Images	System	
ame: Upload Edit			Insert	Cancel



2. Navigate through the content tree on the **Media Library** tab and choose the image or media item that you want to insert. You can also click the **Search** tab and search for the item.

edia Library	Search				
	•	# Media Library   3d6658d8a0bf4e75b3e2d050fabcf4e1 ×	٩	₩₩	E
		Your search has returned <b>299</b> results in <b>00.0586</b> seconds under the <b>curre</b>	ent item item		
	$\square$	Android Phone Template: Image Location: Simulator Backgrounds Version: 1 Created: 2012-04-04 By: sitecore/admin Language: en	(4)	Template flash (2) image (127)	•
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		Android フォン Template: 画像 Location: シミュレーターの発表 Version: 1 Created: 2013-09-07 By: sitecore\admin Language: ja-JP	(4)	main section (4) media folder (38)	
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e:					

For more information about the Sitecore search functionality, see the section *Searching in Sitecore*.

3. Click Insert to insert the image into the rich text field.

### Uploading an Image or File

If the media file that you want to use is not available in the Media Library, you must upload it to the Media Library.

To upload an image or file to the Media Library:

1. In the **Page Editor**, click the **Insert Image** button **E**.





Sitecore opens the Insert Media Item dialog box.

edia Library Search	file that you want to insert.			
<ul> <li>■ Intela Locary</li> <li>⊕ IFles</li> <li>⊕ Images</li> <li>⊕ ISystem</li> </ul>				
	Files	Images	System	
e:				

2. In the Insert Media Item dialog box, click Upload to open the Upload a File dialog box.

	×
Upload a File Select a file	
Select a file	
ilename:	
	Browse
	Cancel

- 3. In the **Upload a File** dialog box, click **Browse** to locate the file that you want to use. Select the file and click **Open** to upload the item to the Media Library.
- 4. Sitecore opens the **Content Editor**, from where you *must* lock the item before you can edit the item and save it.

Sitecore - Sitecore Content Editor Webpage Dialog	X
Home Navigate Review Publish Versions My Toolbar Media	
T V V Edit - Download Drag & Drop	
Content ( )	►
Chrysanthemum	<u>^</u>
You must lock this item before you can edit it.	
To lock this item, dick Edit on the Home tab.	=
Lock and Edit	
Media	
Attach • Detach • Download Media:	
File Path:	
Image	
Alt	
	•
III III	



 Exit the Content Editor to return to the Insert Media Item dialog box. Now you can choose the item that you just uploaded and click Insert to create a link to the new item. If you click Cancel, the Insert Media Item dialog box closes, but the new item remains available for later use.

Insert Media Item Select or search for the image or media file	that you want to insert.
ledia Library Search	
🖃 🔤 Media Library	
🗉 💋 Files	
Images	
🗉 🥼 System	At later 170
	Chrysanthemum
	Chrysanthemum Alternate text:
	Alternate text:
	Alternate text: Width: 1024

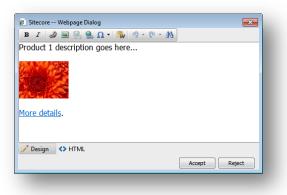
## 3.4.3 Editing a Rich Text Field in the Rich Text Editor

You can also edit rich text fields in the Rich Text Editor.

1. Select the rich text field that you want to edit.



2. Click Edit Text in the Rich Text Editor.





- 3. In the Rich Text Editor you can:
  - o Insert and delete links to other parts of the website and to external websites.
  - Insert pictures or other media items.
  - o Insert symbols into the text.
  - Paste text from Microsoft Word into the item.
  - Find and replace text in the item.
- 4. If you prefer editing the text in HTML format, click the **HTML** button to view and edit the item in that format.
- 5. Click Accept to save your changes and close the Rich Text Editor.

For more information about using the Rich Text Editor, see the section The Rich Text Editor.

#### Note

Your Sitecore system administrator controls the functionality that is available in the Rich Text Editor. If you need more functionality, ask your administrator to make it available to you.

## 3.4.4 Editing a Word Field in the Page Editor

Sitecore also supports using Microsoft Word as a text editor. People who are familiar with Word may prefer using this tool to edit lengthy pieces of content. These Word fields are defined in the template by the developer who creates the website. Consequently, you only come across Word fields if a developer sets them up in the template.

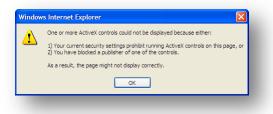
#### Important

You must have Microsoft Word 2007 or later installed on your computer to edit Word fields in Sitecore.

Sitecore Word fields are only supported on Internet Explorer 7 and later.

## **Configuring Word Fields**

If you are using Internet Explorer 8, the first time you access a Word field in Sitecore, you will receive an error telling you that your security settings will not let you run ActiveX controls on the page.



If this is the case, you must configure Internet Explorer to support Word fields in Sitecore.

To configure Internet Explorer to support the Word fields:

1. Ensure that you only have one instance of Internet Explorer open.



2. In Internet Explorer, click Tools (ALT+T), and then click Internet Options.



- 3. In the Internet Options dialog box, click the Security tab, and then click Trusted Sites.
- 4. In the Security level for this zone section, click Custom level, and the Security Settings -Trusted Sites Zone dialog box appears.

ttings	
ActiveX controls and plug-ins	<b>^</b>
Allow ActiveX Filtering	
<ul> <li>Disable</li> <li>Enable</li> </ul>	
	We have a set of the s
Allow previously unused Activ Disable	eX controls to run without prom
Disable     Disable	
Allow Scriptlets	
Allow Scriptiets Disable	
Enable	
Prompt	
Automatic prompting for Activ	/eX controls
<ul> <li>Disable</li> </ul>	
Enable	
Binary and script behaviors	
Administrator approved	
•	•
Takes effect after you restart Interne	et Explorer
eset custom settings	
eset to: Medium (default)	Reset
inculari (deridary	Rebeat
	OK Cancel

- 5. In the **Security Settings Trusted Sites Zone** dialog box, in the **Settings** section scroll down to the **ActiveX controls and plug-ins** node.
- 6. In the Automatic prompting for ActiveX controls section, click Enable.
- 7. Click **OK** to accept the changes that you made.



Now when you access a Word field in Sitecore, you are prompted to install an ActiveX component.



8. Click **Install** to install the component.

When the component is installed, you can edit the field in Word.

#### Note

After you have installed this ActiveX component, you should consider undoing these changes and going back to the original security settings.

### **Editing a Word Field**

To edit a Word field in the Page Editor:

1. In the **Page Editor**, move the mouse over a Word field and it displays a small Word icon.

Description	
l.	
If your organization s	ells products, create a Products Section to showcase them.
This demonstration se	ection shows how you can organize your products into Product Categories.
	ector shows now you can organize your products into product categories.

2. Click **Edit the** word **document** to open a new window that displays the content of this field in Word. You have access to all the functionality that Word contains.

B Sitecore Webpage Dialog	×
🚽 <sup>10</sup> ▼ (0   <del>-</del>	
Home Insert Page Layout References Mailings Review View	^ ?
$\begin{tabular}{ c c c c c c c c c c c c c c c c c c c$	
Clipboard 🗊 Font 🗊 Paragraph 🗊 Styles 🗊	
Want to know what we're doing these days? Want to know what the design press is saying about us? Here's the place to start! You can also subscribe to our Office Core News <u>RSS feed</u> .	
	-
	*
	-
4	- F
Insert a link Insert Media	ject

- To insert a Sitecore link to another item on your website, click **Insert Link**.
- To insert an image from the Media Library, click **Insert Media**.

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- $\circ$   $\,$  To insert an image that is not in the Media Library, use Word's functionality.
- You should upload any images that you want to use regularly to the Media Library.
- 3. Click **Accept** to save the changes you have made, and close the window.
- 4. To close the window without saving your changes, click **Reject**.
- 5. In the **Page Editor**, save your changes and unlock the item.

Depending on how your website has been configured, you can also edit Word fields directly on the page. If your website supports inline editing, all of the functionality of Word is available in the inline editing pane.

<u>~</u> x		Page Layou Roman		-		View L	eveloper	AbleBit	s.co At	3BYY Iran	: 🛆 🧃
		J - abe X				‡≣≁	Ŋ	A			
aste 🛷	🗛 - 🏜	• A • Aa	A A		- <u></u> ≹↓	¶	Quick Styles *	Change Styles *	Editing	9	
pboard 🖷		Font	Es.	Pa	agraph	- G	Style	es Gi			
1.1.1.1	· · · 1 ·		· · 2 · ·		· 3 · ·		• • 4		1.1.1.	· 5 ·	· · / P
fyour	raanizat	tion sells	produc	te creat	a a Dro	ducte	Sectio	n to el	howe	202	-
	ngamzai	non sens	produc	is, creat	c a FIO	uucis	Sectio	11 10 51	nowe	ase	
ham											
hem.											
				. 1					. da este		
`his der		ion secti	on show	s how y	ou can	ı orgai	nize yc	our pro	oduct	s into	-
'his der	nonstrat Categor		on show	s how y	ou can	ı orgaı	nize yo	our pro	oduct	s into	
			on show	's how y	ou can	ı orgaı	nize yc	our pro	oduct	s into	

When you are editing a Word field inline, you see the following additional buttons:

• Display Ribbon 🧼

To display or hide the ribbon in Word, click **Display Ribbon**.

Insert Link 🌌

To insert a Sitecore link to another item on your website, click **Insert Link**.

• Insert Image 🗎

To insert an image from the Media Library, click Insert Image.

For more information about configuring Word fields, see the *Presentation Component XSL Reference* manual.

# 3.4.5 Editing a Media Item

You can also use the Page Editor to edit any media items that are displayed on the website. When you select an image, you are presented with some additional options. Note that the options that are available to you vary depending on the installation and your access rights.

		<b>\$</b> 0	<b>W</b> -	More	•
		1.	¢.		
//	1	3.1			
1	1-		00		



You can:

- Select the image to be displayed.
- Modify the appearance of the image
- Remove the image.

#### Editing the Link in an Image

You can only edit links on images placed in Rich Text or Word fields, and only if you open the text editor.

From either the Rich Text Editor or the Word Editor you can:

- Change the link by inserting a new one.
- Remove the link.

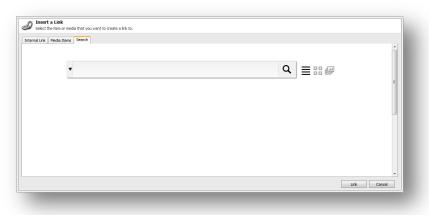
To change the link in an image:

1. If the image is a link, click **Insert Sitecore Link**.

The Insert a Link dialog box opens on the Media Items tab.

ternal Link Media Items Search	
🗷 🥥 Files	
B 💋 Images	
B Contraction of the second se	
B 🕼 Flash	
B OProcess	
B 剑 Sidebar	
B Services	
II Galacia	
Q Partners	
G Inspiration	
About	
B G News	
B Contractor	
iii 🥥 arcolaes	
- NewLogo	
- OfficeCoreLogo	-
	Upload

2. Click the Search tab to search for the content item you want to link to.



For more information about the Sitecore search functionality, see the section *Searching in Sitecore*.

3. If you want to link to a media item, click the **Media Items** tab and navigate through the media items tree.

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4. If you want to link to a page on your website, click the **Internal Link** tab, and navigate through the content tree.

#### Note

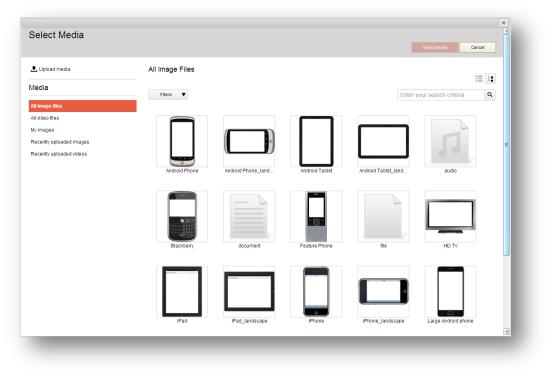
You can only link to another item in this website and not to another website.

5. Click Link.

### Changing the Image

To change the image that is displayed in the image field:

- 1. In the Page Editor, select the image field with the image that you want to change.
- Click the Choose an Image button let to open the Select Media dialog box. The Select Media dialog box opens and displays all the items from the Media Library that is available for the image field you have chosen.



#### Note

The items are not listed in any particular order in the **Select Media** dialog box, so use the search functionality or the pre-defined lists from the menu to find a particular item.

- 3. In the Media menu you can use the links to quickly get a complete list of:
  - o All image files
  - o All video files
  - My images this lists all the image files that have been updated by the current user.
  - o Recently uploaded images
  - o Recently uploaded videos
- 4. To filter the displayed media items according to the images' metadata, click the **Filters** dropdown arrow and select the appropriate filters. The number in parenthesis indicates how many

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items are available for the filter.

Dimensions	Media Type	Updated	
Huge (5) Large (112) Medium (3) Small (15)	Audio (2) Document (2) Flash (1) Image (66)	Today (1) Yesterday (0) Few days ago (0) Last month (0)	I

- 5. If you want to search for a specific item, enter a search word in the **Search** field.
- 6. If you want to navigate through the content tree to find the image that you want to use, click the **Tree View** button in the upper right corner of the **Select Media** dialog box. This displays the Media Library in a content tree. To go back to the list view, click the **List view** button

Select Media	
♠ Upload media	Media Media Library Giles Mages System

- 7. If you need to upload a new image to the Media Library, click **±** Upload media.
- 8. Select the image that you want to use, click **Select Media**, and the new image is inserted into the image field.

#### Modifying the Image Appearance

To modify the image appearance:

1. In the **Page Editor**, select the image.



2. Click Modify Image Appearance to open the Image Properties dialog box.

Image F	Properties		
Set the pr	operties for the image l	here.	
Text	-		
Alternate	Text:		
Default Alternate	Text: News		
Dimensions			
Enter the dimens will only affect the	sions of the image if the ne reference and not th	y are different than t	he dimensions of the original. This
minority direct d	ic reference and not a		
Width:		Keep Aspect Ra	atio
Height:			
	Dimensions: 450 x 310		
Unginal I	umensions: 450 x 510		
Space			
Please provide t	he desired space to pla	ce around the image.	
Horizontal Space			
norizontal space	•		
Vertical Space	:		
			OK Cancel

- 3. In the **Alternate Text** field, enter the text to be displayed when you move the mouse over the image.
- 4. In the **Dimensions** section, specify the dimensions that the image should be displayed in if they differ from the actual size of the image.
- 5. In the **Space** section, specify in pixels how much space should be placed around the image.



# 3.5 Searching in the Page Editor

In the Page Editor you can use the search functionality to search for a specific item and then redirect the Page Editor to that item. Also, if you are working on multiple websites, you can use the search functionality in the Page Editor to quickly move from one site to another.

	news	₩ 
	Your search has returned $4$ results in $00.0155$ seconds under the $\ensuremath{\textit{current}}$ item item	Template news article (2) news section (1)
Version: 1	ore-News E RSS Feed Location: RSS-Feeds Created: 2009-10-19 By: Slate(ja-JP) Translate(da-DK) Translate(de-DE) en	rss feed (1) Language english (3) japanese japan (1)
Version: 1	nes E: Neus Article Location: News Created 2013-02-21 By: altecor\admin Version @ Lock for Editing @ Open @ Page Editor @ Preview @ Publish @ Unlock from Editing Salet(da-DK) @ Translate(de-DE) @ on @]a-JP	(2) Author sitecoreadmin (4)
Version: 1	ews E: Hens Article Location: News Created 2013-02-23 By: altecore ladmin VersionLock for EditingOpenPage EditorPreviewPublishUniock from Editing satet(da-DK)Translate(de-DE)en)a-JP	(2) older (2) thismonth (2) thisweek (1) thisyear (2) today (1)

To redirect the Page Editor to a specific item using search:

1. In the Page Editor, click the **Search** icon in the menu of the Page Editor and the **Navigate to Item** dialog box opens.

An automatic search is run for all items across all your Sitecore sites, so the **Navigate to Item** dialog box displays a list of all the items that exist on your websites.

- 2. Narrow down the search to find the item.
- 3. Select the item that you are interested in from the list of search results and click OK.

#### Note

The search functionality is also available when the Page Editor is in preview mode.

For more information about the Sitecore search functionality, see the section Searching in Sitecore.



# 3.6 **Previewing Pages**

You can preview the website without publishing.

### 3.6.1 Previewing the Pages in the Page Editor

The Preview application supports the ability to specify a preview date, which allows you to view the site in the past or future, based on the publishing restrictions as they are currently set. Moreover, in the Preview mode you can see how a page looks in different language versions and how the page is displayed for different devices.

To preview a page in the Page Editor:

- 1. Open the Page Editor in preview mode:
  - From the Page Editor, in the **Mode** group, click **Preview**.
  - From the Content Editor, on the **Publish** tab, in the **Publish** section, click **Preview**.
- 2. On the **Experience** tab, select the preview parameters (Date and Language). This tab might not be available to you if you don't have enough security permissions.
- 3. Navigate through your website to preview the pages.

### 3.6.2 Previewing the Pages in the Device Simulator

The Device Simulator enables you to preview your website in a simulation of several different devices, such as an *iPhone*, *iPad*, *Android Phone*, and *Blackberry*.

The device simulator mimics the devices and the preview is not a pixel-perfect rendition of the website as it appears on each device. However, it gives you a good indication of how the device presents the website and allows content authors to quickly see how their pages look on mobile devices.

To preview a page in the **Device Simulator**:

- 1. On the Experience tab, in the Mode group, click Preview.
- 2. In the Simulator group, click the drop-down arrow and select a device.





All the navigation in the simulation remains fully functional.



3. Click **Services** to go to the Services page.



In the **Device Simulator** you can:

- Click **Rotate** to change the orientation of the device.
- Scroll up and down as well as left and right.



4. Click None to close the simulation and return to the default page preview.





# 3.7 Creating a New Item in the Page Editor

As a content author, you can create new content items and insert them into the web page where you want them displayed.

The ways in which you can create items in Sitecore can vary depending on the security roles that you have been assigned and the way your website has been customized.

### 3.7.1 Inserting Items

To insert a new item onto the page in the Page Editor:

- 1. Navigate to the page that you want to edit.
- 2. Click the **Edit** button at the top of the page.
- 3. On the ribbon, click Insert Page to open the Insert Page dialog box.

Sitecore Webpage Dialog Insert		<b>x</b>
	want to insert. You must give	the item a name.
4	<b>F</b>	
Product Category	Product Description	
item Name: Sports Products	Insert	Cancel

The type of item that you can create varies depending on where you are on the website. If you are on the front page, you can insert a new section and, depending on the type of section that you are working with, you can add appropriate items to that section.

- 4. Select the type of item that you want to insert. In this example, you insert a new section.
- 5. In the Item Name field, enter the name of the section that you want to insert.
- 6. Click **Insert** to create the new section and the section is added to the website and as you can see, the new section contains no items.



When you create a new item, it is automatically locked to prevent other users from editing it.



- 7. Now you can edit the item by adding text, images, sidebar text, and so on.
- 8. When you are finished editing the new item, click **Save** and then **Unlock** to make the item available to other content authors.

For more information about unlocking items, see the section Unlocking Items in the Page Editor.



# 3.8 Deleting Content

Content authors also need to delete items and content from time to time. This is a very simple task in the Sitecore Page Editor.

# 3.8.1 Deleting an Item

To delete an item from the Page Editor:

1. Navigate to the item that you want to delete.

If you want to delete an item, navigate to that item.

If you want to delete a subitem, navigate to the subitem in question and not just the link to it that is shown on another item.

2. On the ribbon, click Delete Page to remove the item or section.

Once again, depending on the customizations carried out on your website and the way the **Page Editor** has been configured, the **Delete Page** button may be located on the ribbon or at the top of the screen.

3. If you try to delete an item that contains subitems, a message appears informing you that that the section contains subitems and that these items will be deleted along with the section.

?	Are you sure you want to delete "Case-Studies"? This item has sub-items which will also be deleted if you delete this item.
	OK Cancel

- 4. If you want to save any of the items, click **Cancel** and then move them to another section.
- 5. Click **OK** to delete the item and its subitems.



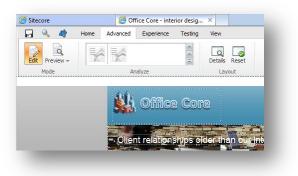
# 3.9 Assigning Profile Card to Items

When content authors use the Page Editor to create and edit the content items that make up the website, they can also assign profile cards to these items. Using profile cards is a way to consistently assign a specific set of profile values to items across the website. Note that content authors need the appropriate user access rights in order to be able to assign profile values and cards to items.

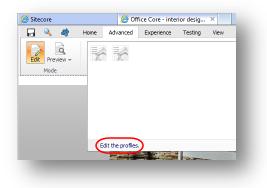
For more information about profile cards and values, see the Marketing Operations Cookbook.

To assign profile cards and profile values to an item in the Page Editor:

1. In the **Page Editor**, navigate to the page that contains the item that you want to assign profile values to and expand the ribbon.



2. In the **Advanced** tab, in the **Analyze** group, click the drop-down arrow and then click **Edit the profiles** to edit all profiles on this page.





3. In the **Profile Cards** dialog box, select one of the profile card that you are interested in and click **Edit** and the **Select Profile Card** dialog box appears.

Sitecore Webpa		×
Profile Care The profile care Click Edit to as	is ds that are assigned to the current item. sign a profile card or change the profile cards that are assigned	d.
Focus	Edit	
Function	Edit	
Persona	Edit	
Score	Edit	
	Close	Cancel

The **Select Profile Cards** dialog box looks different depending on which option you select in the **Authoring Selection** field in the **Profile Cards** item.

If you select the *Single* option in the **Authoring Selection** field, the **Select Profile Cards** dialog box looks like this:

rofile Cards	Profile Card Details Customize
ame	
Decision Maker	
	Profile Card Values
	Background
	0.80
	0.60
	0.40
	Scope 0.00 Practical
	Process

4. Click **Customize** if you want to assign custom profile values.



# **Chapter 4**

# **Managing Content in the Content Editor**

This chapter introduces the Content Editor and the functionality it contains. It contains detailed descriptions of how to edit existing items. There is also a description of how to manage images in the Content Editor. There are detailed instructions on how to create new items and how to delete items.

This chapter contains the following sections:

- The Content Editor
- Editing an Item in the Content Editor
- Creating New Items in the Content Editor
- Deleting Items in the Content Editor
- Archiving
- Cloning Items
- Setting Reminders



# 4.1 The Content Editor

The Content Editor has been designed for more experienced content authors who are familiar with Sitecore and the functionality that it contains.

The Content Editor is a large application but its appearance and the functionality that it contains varies depending on the roles that have been assigned to the user, the local security settings, and the amount of customizations that have been carried out on your installation.

The Content Editor gives the user access to an array of functionality that meets the needs of the more experienced content author.

The functionality that you have access to in the Content Editor can vary greatly. As a minimum you can expect to see:



If you have been given more extensive access rights, you will probably have access to more commands and more tabs:

H	ome	Navigate Review Publish Vers	sions				
Ed	<b>?</b> lit →	Contact Section (1 of 8) Executive Profiles Section (2 of 8)	Duplicate	X Delete 🗸	Paste Cut	🛄 Rename 🍸 Display Name	<ul> <li>∧ Up</li> <li>◆ First</li> <li>◆ Down</li> <li>◆ Last</li> </ul>
e Ed	it	Insert 🕫	Operations		Clipboard	Rename	Sorting To

If you have complete access to the Content Editor, it will look something like this:

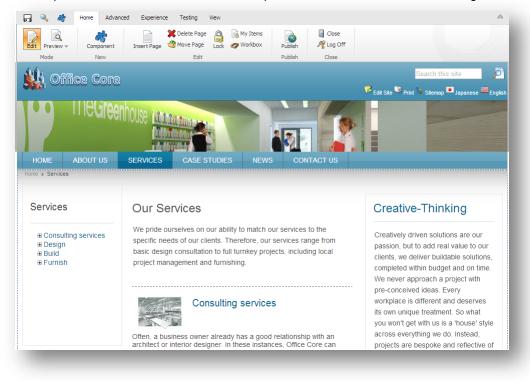
	Home	Navigate Review		sions Configure	Presentation	Security View	Developer	
		About Us Section	(1 of 10)	Cop		😭 🤣 Cut	TI Rename	∧ Up 🔗 First
ave /rite	Edit	Contact Section	(2 of 10) 👳	Duplicate Mov	/e To Delete -	Paste D Copy	T Display Name	💜 Down 😻 Last
/rite	Edit	Insert 🖻		Operations		Clipboard	Rename	Sorting To

# 4.1.1 The Page Editor vs. the Content Editor

When you log in to the Content Editor, the items that make up your website are presented to you in a very different way than they are in the Page Editor. In the Page Editor, you see the items as they are presented on the website. In the Content Editor, you see the items as objects in the content tree and when you select an item, it is presented to you as a list of fields that you can edit.



#### For example, the Services section of the sample website looks like this in the Page Editor:



You can edit all of the items that appear on the page — text, graphics, logos, links, and so on. When you open the *Services* section in the Content Editor, it looks like this:

e Edit - Edit Insert G	plate (2 of 2) Duplicate - A Move To Delete - Paste Copy Topplay Name Operations Sorting Copy
rdh 🔍 🔻	
istecore     definition     def	Services
Items	O Quick Info
🗷 🏭 About-Us	🕒 Meta Data 🔹
<ul> <li>Services</li> <li>Consult</li> </ul>	
🗉 🍓 Consult	Banner Slogan:
🗉 🛃 Build	
🗉 🔩 Furnish	
<ul> <li>Case-Studies</li> <li>News</li> </ul>	v
<ul> <li>Wews</li> <li>Contact-Us</li> </ul>	
📧 🔝 RSS-Feeds	Browse · Properties · Open Media Library · Edit Image · Clear · Refresh
🗉 🥥 Settings	Banner Image: /Images/Banners/bannerNewsArchitectureDigest
Media Library     Templates	
	Dimensions: 980 x 102
	Default Alternate Text: 'hews'
	E Menu 😑
	Menu Title:
	Services
	bernes
	Henu Tooltip [standard value]:
rent Editor Media Library Work	Henu Tooltip [standard value]:

As you can see, it is presented as a list of fields that you can edit. Furthermore, the fields that you are presented with are only those that belong to the *Products* item itself. The *Services* item, the *Home-Services* item, and so on are all separate items and must be edited independently of each other in the

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Content Editor. In the Page Editor, you are presented with the web page as you see it on the website and you can edit almost every page element even if it does not belong to the current item.

# 4.1.2 The Content Tree

One of the main features of the Content Editor is the content tree that is used to present all the items that have been created for the website.

Search	Q 🔻
😑 📄 sit	ecore
🖃 🛃	Content
	🙆 Home
	🗉 🧔 Standard-Items
	🗉 🊨 About-Us
	🗉 🌍 Services
	🗉 💑 Consult
	🗉 💑 Design
	🗉 💑 Build
	🗉 💑 Furnish
	🗉 🧾 Case-Studies
	🗉 📦 News
	E Contact-Us
	🗉 🔝 RSS-Feeds
÷	🧔 Settings
± 🔤	Media Library
± 🧾	Templates

The Sitecore content tree has a similar structure to the one used in Windows Explorer. In Sitecore, objects and groups are not represented by standard folder and file icons but by many different icons. You can expand and open every group in the Sitecore content tree just as you can with the folders in Windows Explorer. When there is a plus '+' beside an icon, it contains subitems and can be expanded. When there is a minus '-' beside an icon, it has already been expanded and when there is no symbol, the item contains no subitems.

# 4.1.3 Searching From the Content Tree

If you want to do a quick and simple search through the Content Tree, you can use the search function associated with the Sitecore content tree.

To search for an item using the Content Tree search:

1. In the content tree, select the object that you want to search from. This is the starting point for your search.

The Sitecore search engine searches the entire content tree. However, the search results found after this starting point is listed first.

- 2. In the **Search** field, enter the keyword that you want to search for. This can be any character, number, word, and so on.
- 3. Click **Search** <a> or press ENTER to perform the search.</a>



# Adding Search Criteria

If you need to search for more than just one item or keyword, you can do that by entering one or more criteria to the search.

To add a criterion to your search:

1. Click the drop-down arrow - to open an extra pane.

news	🤍 ◄
Name:	
💐 Add Criteria	

2. In the Name field, enter the name of the item you want to search for.

If you want to change the field that you search in, click the name of the field and a list appears displaying the names of all the fields in the current item.

	Breadcrumb Title	-
	Browser Title	
6	Full	1.000
🥭 Sitecc	Images	1.00
	Menu Title	
	Menu Tooltip	
	Meta Description	
Save	Meta Keywords	
Write	Overview Abstract	
Search	Overview Image Max Width	
	Related Items	
	Sidebar Text	
	Sidebar Title	
R 🌮	Text	
	Title	8
=	Archive Version date	
	Archive date	
	Boost	
	- r	1.0

3. To add an extra criterion, enter a name in the **Add Criteria** field and then click **Add Criteria**. Click the name of the criterion to change it to one of the pre-defined criteria.

natic		<ul><li></li></ul>
Name:		
💐 Add Criteria	my criterion	
😑 📄 sitecor	e	
🖃 💑 Cor	ntent	
± 🕤	Home	
🗉 🥎	Sample	
• 🕑	Help	
• 🧉	Meta-Data	
± 📁	Settings	
🖽 🔁 Lay		
🖃 🔤 Me		
	Files	
-	Images	
=	📁 Banners	
	<ul> <li>confused</li> </ul>	
	um crowd	

- 4. Now enter the value for the new criterion and press ENTER. The items found below the selected item in the content tree are displayed first.
- 5. Click a search result to open it in the editing pane.



# **Removing a Criterion**

To remove a criterion again, click the name of the criterion and then click **Remove** at the very bottom of the menu that appears.

# 4.1.4 Locking in the Content Editor

In the Content Editor, you *must* lock an item before you can edit it. And once you are done editing the item you must unlock it again to make it available for other content authors to work on.

### Locking an Item

To lock an item:

- 1. In the **Content Editor**, navigate to the item that you want to edit.
- 2. On the **Home** tab, click **Edit** to lock the item.

	Home	Navigate Review	Publish Vers	ions							
1	772	22 About Us Section	(1 of 8) 📩	B	Copy To	2	(chan)	Cut	TI Rename	🔥 Up	👷 First
			(0 -1 0)			~		Сору	T Display Name		😽 Last
	Edit 👻	Contact Section	(2 of 8) 👳	Duplicate	📥 Move To	Delete 🔻	Tuble		Display Name	💙 Down	Se Last
41	Edit	Insert 🕫		Operation	S		Clipboa	ard	Rename	Sorting To	

When you lock the item, the functions and commands that are available to you are activated in the **Content** pane.

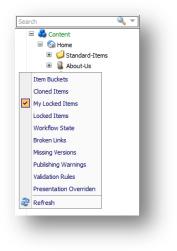
Candaaa	
Services	
Quick Info	
Meta Data	
l' Banner	8
Banner Slogan:	
	*
	2
/Images/Banners/bannerNewsArchitectureDigest	
Dimensions: 980 x 102 Default Alternate Text: "news"	
Dimensions: 980 x 102 Default Alternate Text: 'news'	
Dimensions: 980 x 102 Default Alternate Text: "news"	
Dimensions: 990 x 102 Default Alternate Text: "news" Percadcrumb Menu Menu Title:	
Dimensions: 980 x 102 Default Alternate Text: "news"	
Dimensions: 990 x 102 Default Alternate Text: "news" Percadcrumb Menu Menu Title:	

To get a quick overview of your locked items you can activate the quick action **My Locked Items** in the quick actions bar left of the content tree. Right-click left of the content tree and

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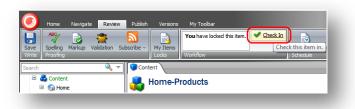
#### select My Locked Items.



### Unlocking an Item

When you have finished editing the item, you must remember not only to save the changes but also to unlock the item so that other users can edit it.

To unlock the current item, either click **Edit** on the **Home** tab or click **Check In** in the **Workflow** group on the **Review** tab.



### **Unlocking Multiple Items**

As a content author, you often have to make extensive changes to many items on the website. This can mean that you have to lock many items and keep them locked to ensure that your changes are implemented consistently across all the items.

Sitecore keeps track of all the items that are locked to ensure that nobody else can edit them. It also keeps track of all the items that have been locked by each individual user.

To unlock the items you have locked:

1. In the **Content Editor**, click the **Review** tab.





2. In the Locks group, click My Items.

oo My Ite	Webpage Dialog
	he items that are locked by you.
Drag a column i	to this area to group by it. Search:
Name	Path
RSS-Feeds	/sitecore/content/Home/RSS-Feeds
Copyright	/sitecore/content/Home/Standard-Items/Copyright
Statistics	/sitecore/content/Home/Standard-Items/Statistics
Services	/sitecore/content/Home/Services
II I	Unlock All
	Close

The **My Items** dialog box lists all of the items you have locked. You may have locked these items during the current session or during previous sessions.

3. Select the items that you are finished editing and click **Unlock** to unlock them, or click **Unlock All** to unlock all the items.



# 4.2 Editing an Item in the Content Editor

Experienced content authors might feel more at home with the advanced functionality that is available in the Sitecore Content Editor.

In the Content Editor, you can edit all of the fields that an item contains — rich text fields, Word fields, image fields, and so on.

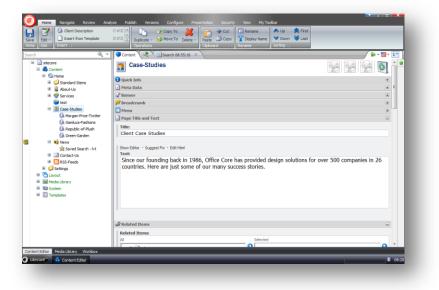
In all the procedures and tasks described in this chapter, it is assumed that you have already locked the item.

# 4.2.1 Editing a Rich Text Field in the Content Editor

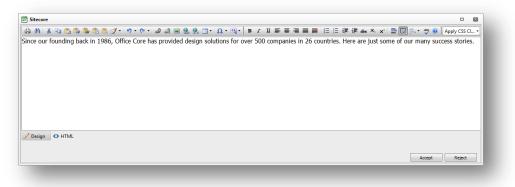
After you have selected an item in the content tree, you can edit it.

To edit a Rich Text field in the Content Editor:

1. In the **Content Editor**, locate the item that you want to edit in the content tree.



- 2. In the **Content** pane, locate the field that you want to edit.
- 3. Click Show Editor to open the Rich Text Editor.



The Rich Text Editor gives you access to more functionality than inline editing. You can:

• Insert and delete links to other parts of the website and to external websites.

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- Insert pictures or other media items.
- o Insert symbols into the text
- Paste text from Microsoft Word into the item.

If you prefer, you can use Microsoft Word to write the text that you want to use in the item and paste it into the **Rich Text Editor**.

• Find and replace text in the item.

#### Note

The functionality that is available in the Rich Text Editor is controlled by your Sitecore system administrator. If you need more functionality, ask your administrator to make it available to you.

Furthermore, you can also view the item in HTML format, if you have the necessary expertise and feel comfortable editing the text in that format.

- 4. When you are finished editing the item in the **Rich Text Editor**, click **Accept** to save the changes that you have made to the field.
- 5. To check the spelling, click the **Review** tab and, in the **Proofing** group, click **Spelling** to start the spell checker. The spell checker runs through all the text fields in the item.
- 6. When you have finished editing the item, click **Save** to save the changes you have made to the item and then click **Edit** to unlock the item so that other users can edit it if they need to.

#### Note

The spell checker only checks the current item. If you have edited several items, you must open them individually and run the spell checker.

For more information about using the Rich Text Editor, see the section The Rich Text Editor.

# 4.2.2 Editing a Word Field in the Content Editor

You can also edit Word fields in the Content Editor.

#### Important

You must have Microsoft Word 2007 or later installed on your computer to edit Word fields in Sitecore.

Sitecore Word fields are only supported on Internet Explorer 7 or later.

If you are using Internet Explorer 8, the first time you access a Word field in Sitecore, you will receive an error telling you that your security settings will not let you run ActiveX controls on the page.

For more information about how to configure Internet Explorer 8 to run this ActiveX control, see the section, *Configuring Word Fields*.

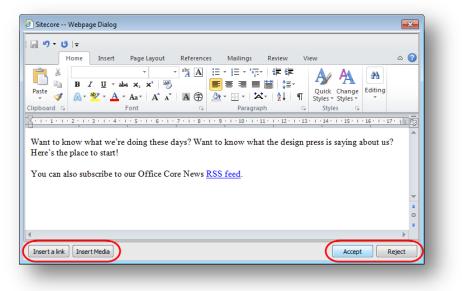


To edit a Word field:

1. In the **Content Editor**, open the item that you want to edit.

Search Content C	
News	
) Meta Data	
Banner	
Breadcrumb	۲
Menu	۲
) Page Title and Text	-
Title:	
In the News	
Show Edity - Suggest Fix - Edit Html Test: Want to know what we're doing these days? Want to know what the design press is saying about us? Here's the place to You can also subscribe to our Office Core News <u>RSS feed</u> .	> start!

2. Click Edit to open a new window displaying the content of this field in Word.



This window gives you access to all of the functionality in Word.

- 3. To insert a Sitecore link to another item on your website, click Insert Link.
- 4. To insert an image from the Media Library, click Insert Media.
- To insert an image that is not in the Media Library, use the functionality in Word.
   You should upload any images that you want to use regularly to the Media Library.
- When you are finished editing the Word field, click Accept to save your changes and close the window.
  - To close the window without saving your changes, click **Reject**.
- 7. In the **Content Editor**, save your changes and unlock the item.

For more information about Word, see Microsoft's documentation.



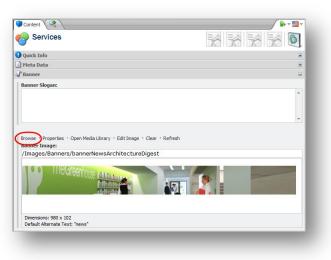
# 4.2.2. Working with Graphics

As a content editor, you may often have to change or edit the media items that are displayed on your website.

### Changing an Image in the Image Field

To change an image in the Image field:

1. In the Content Editor, locate the item that you want to edit in the content tree.



2. In the **Content** pane, click **Browse** to open the **Select Media** dialog box. The **Select Media** dialog box opens and displays all the items from the Media Library that is available for the image field you have chosen.

🚖 Upload media	All Image Files					
Vedia	, in integer nes				:=	:
	Fiters 🔻			Enter	your search criteria	2
All Indeo files All Indeo files My images Recently uploaded images Recently uploaded Mdeos	Android Phone	Android Phone_Jand	Android Tablet	Android Tablet_Jand	audio	Ш
	Blackberry	document	Feature Phone	Rie Rie	HD TV	
	iPad	iPad_landscape	iPhone	IPhone_landscape	Large Android phone	

#### Note

The items are not listed in any particular order in the Select Media dialog box, so use the search functionality or the pre-defined lists from the menu to find a particular item.

3. In the **Media** menu you can use the links to quickly get a complete list of:

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- o All image files
- o All video files
- o My images this lists all the image files that have been updated by the current user.
- Recently uploaded images
- Recently uploaded videos
- 4. To filter the displayed media items according to specific metadata of the image, click the **Filter** drop-down arrow and select the required filters. The number in parenthesis indicates how many items are available for the filter.

Dimensions	Media Type	Updated	
Huge (5)	Audio (2)	Today (1)	
Large (112)	Document (2)	Yesterday (0)	
Medium (3)	Flash (1)	Few days ago (0)	
Small (15)	Image (66)	Last month (0)	

- 5. If you want to search for a specific item, enter a search word in the **Search** field.
- 6. If you want to navigate through the content tree to find the image that you want to use, click the **Tree View** button in the upper right corner of the **Select Media** dialog box. This displays the Media Library in a content tree. To go back to list view click the **List view** button

Select Media		
🚖 Upload media	Media	
	▲ 🔤 Media Library ▶ 📁 Files	
	► 🥥 Images ► 🗐 System	

7. Select the image that you want to use, click **Select Media**, and the new image is inserted into the image field.

#### Uploading an Image

If the image you want to use is not available in the Media Library, you can easily make it available by uploading it to the Media Library.

To add an image to the Media Library:

1. In the **Content** pane, click **Browse** to open the **Select Media** dialog box.



2. Click **1** Upload media to upload a new media item to the library.

Back		1. Upload media Cancel
	Drag and drop files here	
	or	0 Bytes   0 files
	Browse for media files	o bytes formes

- 3. To add the new media items to the **Upload Media** dialog box, you can:
  - Click **Browse for media files** to navigate to the image that you want to add to the Media Library.
  - Drag and drop the images directly into the **Upload Media** dialog box.
- 4. Add as many media items to the **Upload Media** dialog box as you need and be sure to enter the appropriate name, description, and alternate text for each new media item.
- 5. When all the necessary media items have been added, click Upload media.
- 6. When the upload is completed, click **Back** to go back to the **Select Media** dialog box.

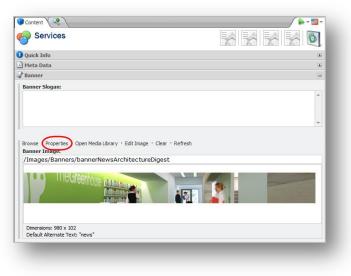
The image is now uploaded to the Media Library and you can use it on your website.

#### Editing the Properties of an Image

After you have added an image to an item in the Content Editor, you can edit the properties of the image.

To edit the properties of the image:

1. In the **Content** pane, scroll to the field containing the image.





2. Click **Properties** to open the **Image Properties** dialog box.

	e Webpage Dialog 🛛 💦
	nage Properties
Se	et the properties for the image here.
Text	
A	Nternate Text:
Default A	Alternate Text: News
Dimens	ions
Enter th	e dimensions of the image if they are different than the dimensions of the original. This
will only	affect the reference and not the original image.
Width:	Keep Aspect Ratio
Height:	
(	Driginal Dimensions: 450 x 310
Space	
Please p	rovide the desired space to place around the image.
	10
nunzonta	al Space:
Vertica	al Space:
	OK Cancel

- 3. In the Alternate Text field, enter the text that you want to appear in the tooltip for this image
- 4. In the **Dimensions** section, specify the dimensions that the image should be displayed in if they differ from the actual size of the image.
- 5. In the **Space** section, specify how much space should be placed around the image.

### **Editing an Image**

You can use Sitecore to edit the image if you need to.

To edit an image:

1. Scroll to the field that contains the image.

Services	
Quick Info	
Meta Data	
Banner	8
Banner Slogan:	
	A
	+ Refresh
Banner Image:	
Browse · Properties · Open Media Library Edit Image Clear Banner Image: /Images/Banners/bannerNewsArchitectureDiges	
Banner Image:	



2. Click **Edit Image** to open the image in the built-in Image Editor, where you can crop, resize, flip, and rotate the image.



#### Note

You can also edit the image with any image editor that is available on your local computer.

3. When you are finished editing the image, click **Save** and close the **Image Editor** to return to the **Content Editor**.

All the changes that you make are applied to the version of the image that is stored in the Media Library and not just the copy shown on your web page.

- 4. In the **Content Editor**, click **Refresh** to see the changes that you made.
- 5. If you want to remove the image, click Clear.



# 4.3 Creating New Items in the Content Editor

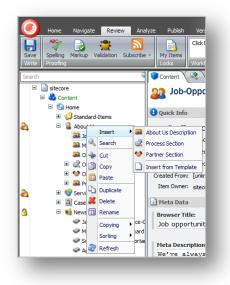
There are several ways to create new items in the Content Editor.

You can:

- Create a new item
- Duplicate an existing item
- Copy an item to another location.
- Create an item based on a template.

In the Content Editor, when you insert a new item, it is generally created as a sub item of the current item. However, you can also create a new item at the same level as the current item. You *cannot* create an item that is at a higher level than the current item.

The following sections describe how to use the Sitecore ribbon to create, copy, move, duplicate, and delete items. You can also access all of this functionality by right-clicking in the content tree.



# 4.3.1 Creating a New Item

You can easily create a new item as a subitem of the current item.

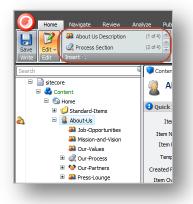
#### **Inserting a Subitem**

To insert a new subitem:

1. In the **Content Editor**, locate the item for which you want to create a new subitem.



2. In the **Insert** group, click one of the item types that is displayed, enter the name of the new item, and click **OK**.



3. If the item type you want to insert is not displayed, click the scroll arrows in the **Insert** group to find the type of item you want.

Alternatively, in the **Insert** group, click the drop-down arrow subscription and select the subitem from the list that appears.

$\bigcirc$	Home	Navigate	Review	Analyze	Pub
	<b>***</b>	Insert a New	v Subitem.		
Save	Edit -	🚨 About Us	Description		
Write	Edit	Recess 9	Section		
Search		💙 Partner S	Section		
	sitecor	Insert a Net	w Sibling.		1
		🗑 Site Sect	ion		N
	Ξ 🙆				- 11
					:1
<u>à</u>					er
					N
		Insert fr	om Template		F
		228			

4. In this drop-down list, you can select a subitem or a sibling. A sibling is an item on the same level as the current item.

To insert an item at the same level as the current item, in the **Insert a New Sibling** section, click **Site Section**.

In this example, we add a new product category to the list. This new category is a subitem of an item and can contain its own subitems.

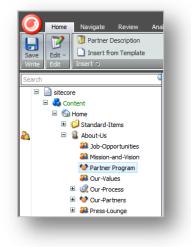
5. Select the type of subitem that you want to create and a dialog box appears prompting you to name the new item.

🗿 Sitecore Webpage Dialog	×
Enter the name of the new item:	
Partner Program	
	OK Cancel

6. Enter a name for the new item.



The new item is now added to your website.



As you can see, the new item has been created as a subitem and has been automatically locked.

Every new item that you create is automatically locked and opened for you. You must unlock them before other users are allowed to edit them.

7. Edit the new item. Scroll down through the fields and add an image, text, and so on.

When you have finished editing the item, you can add a new subitem to it.

# 4.3.2 Duplicating an Existing Item

Sitecore lets you duplicate existing items.

To duplicate an existing item:

- 1. In the content tree, locate the item that you want to duplicate.
- 2. On the **Home** tab, in the **Operations** group, click **Duplicate** and a dialog box appears prompting you to name the new item.
- Enter a name for the new item and it is added to the content tree. The duplicated item is added at the same level as the original item. It also contains all of the same text, images, and so on as the original item.
- 4. Edit the new item and enter the text, images, and so on that you want to be displayed in this item. When you have finished editing the item, you can move it to another location if necessary.

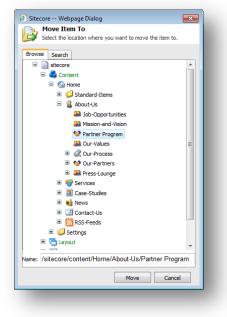
#### Moving an Item

To move an item:

1. In the content tree, locate the item that you want to move.



2. On the **Home** tab, in the **Operations** group, click **Move To**.



- 3. In the **Move Item To** dialog box, select the location that you want to move the item to. You can navigate to the location in the content tree on the **Browse** tab or search for the location on the **Search** tab.
- 4. Click **Move** to move the item to the new location.

For more information about the Sitecore search functionality, see the section Searching in Sitecore.

# 4.3.3 Copying an Item to another Location

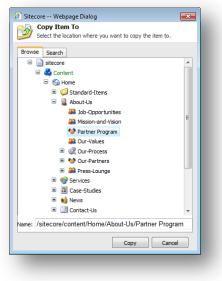
You can also create a new item by copying an existing item to the location where you want the new item to belong.

To copy an item to another location:

1. In the content tree, locate the item that you want to copy.



2. On the Home tab, in the Operations group, click Copy To.



- 3. In the **Copy Item To** dialog box, select the location that you want to copy the item to. You can navigate to the location in the content tree on the **Browse** tab or search for the location on the **Search** tab.
- 4. Click **Copy** and the item is copied to the specified location.
- 5. To rename the new item click Rename on the Home tab, in the Rename group.

ОК	Cancel
	ОК

6. Enter the new name of the item and click **OK**.

For more information about the Sitecore search functionality, see the section Searching in Sitecore.

#### **Copying Multiple Items to another Location**

If you want to copy multiple items to a specific place at the same time, you can use the search operations in the Sitecore search engine.

For more information on how to use the search operations, see section Searching in Sitecore.

# 4.3.4 Creating an Item Based on a Template

If you have been given sufficient access rights, you can also create an item based on a template. You can create a new item based on *any* template.

To create an item based on a template:

- 1. In the content tree, locate the item that you want to create a subitem for.
- 2. On the **Home** tab, in the **Insert** group click the scroll arrow and select **Insert from Template**.

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3. Navigate to the template in the content tree that you want to base the new item on or click the **Search** tab to search for the template.

						×
	ert from Template t or search for the template you want to	use. In the Item Name f	eld, enter a name for t	the new item.		
	earch					
	emplates					
	Branches					
± 🌜	Common					
E 🧯	Office Core					
H 🌜	Sample					
E 🌜	Starter Kit					
	System					
E 🧯	User Defined					
plate:						
n Name:	New Templates					
					Insert	Cancel

For more information on how to optimize your search, see the section Searching in Sitecore.

- 4. In the **Insert from Template** dialog box, select the template that you want to use to create the new item.
- 5. In the **Item Name** field, enter a name for the new item.
- 6. Click **Insert**, and the item is added to the content tree.
- 7. Now edit the item and save your changes.

### **Previewing Your Changes**

When you have finished editing all the new items that you have created you might like to see how these new items will look on your website.

To see a preview of your changes:

- 1. Click the **Publish** tab.
- 2. In the **Publish** group, click **Preview** to see how the item looks.

A new browser window opens displaying the current item. You can then browse the website to see all the changes that have been made.

When you are satisfied with all the changes that you have made, unlock all the items that were locked to make them available to other users.



# 4.4 Deleting Items in the Content Editor

Content authors must inevitably delete content items from time to time. When you delete a content item, you can delete the entire item including every version of the item and all of its subitems or just some individual versions of the item.

## 4.4.1 Deleting an Item

To delete an item from the website:

- 1. In the content tree, locate the item that you want to delete.
- 2. On the **Home** tab, in the **Operations** group, click **Delete**.

Alternatively, you can right-click the item in the content tree and click **Delete** in the shortcut menu that appears.

The entire item is deleted from the website — every version of the item in every language is deleted.

If you try to delete an item that contains subitems, a message appears informing you that the section contains subitems and that these items will be deleted along with the main item.

?	Are you sure you want to delete "Case-Studies"?
	This item has sub-items which will also be deleted if you delete this item.
	OK Cancel

If you want to save any of the subitems, click **Cancel** and then move the subitems to another part of the website before you delete the parent item.

3. Click **OK** to delete the item and its subitems.

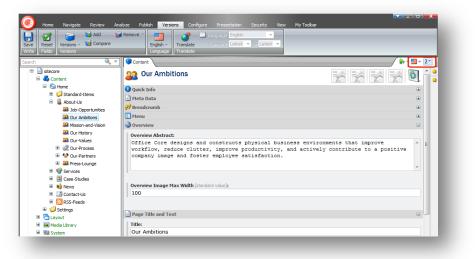
## 4.4.2 Deleting a Version of an Item

If you have created several different version of the same item, you can delete individual versions of the item without deleting the entire item or any of its subitems.



To delete a version of an item:

1. In the content tree, locate the item that has a version that you want to delete.



- 2. In the right-hand pane, on the **Content** tab, click the language button <sup>■</sup> and select the language version that you want to delete.
- 3. Click the Versions button and select the version in this language that you want to delete.
- 4. On the **Versions** tab, in the **Versions** group, click **Remove** and this version is deleted from the website and placed in the Recycle Bin.

## 4.4.3 Deleting Multiple Items

If you want to delete multiple items from Sitecore, it is recommended that you use the Sitecore search interface. On the **Search** tab, you can search for the items that you would like to delete.

To search for and delete multiple items:

1. In the **Search** field, enter your search keyword.

Use the necessary facets or filters to narrow down your search to list only the items that you want to delete.



2. On the left of the search field, click the drop-down arrow.

🖏 My Recent Searches - List of your ree	cont coarches	_
Recently Modified - List of recently m		
Recently Created - List of recently r		
Recent Tabs - List of tabs you have o		
🎙 Search Filters - List of available sear	ch filters.	
🛞 Search Operations - List of operation	s that you can perform on the results.	
Add Tag	🛃 Copy to Datasource Query	
Search And Replace	🖁 Apply Security Rule	
Clone Results To	🍓 Copy Results To	
Delete Results	🦆 Move Results To	
🔵 Publish Items	鞼 Serialize Items	
P Apply Campaigns Goals Events To AllItems	💄 Apply Profile Score To All Items	
E Apply Presentation To All Items		

3. Click Search Operations and then click Delete Results.

#### Warning

Once you click **Delete Results**, the result items are deleted without warning or confirmation.

For more information about using the Sitecore search functionality and the search operations, see the section *Searching in Sitecore*.

## 4.4.4 Removing Items from the Recycle Bin

When you delete a content item from the content tree, it is moved to the Sitecore Recycle Bin. In the Recycle Bin, you can permanently delete individual items or empty the bin completely.

To delete an item permanently, open the Recycle Bin, and in the Operations group, click Empty.

To delete individual content items, open the **Recycle Bin**, select the item that you want to delete and in the **Operations** group, click **Delete**.

## 4.4.5 Restoring a Version of an Item

After you have deleted an item, you can also restore the entire item or some individual versions of the item.



To restore a version of an item:

1. In the **Content Editor**, click the **Sitecore Start** button in the lower left corner and then click **Recycle Bin**.

Name	Original Location		Search:		
	engine coccorr	Date	Ву		
Our Ambitions	/sitecore/content/Home/About-Us/Our Ambitions	04-09-2012 13:44:49	sitecore\admin		
Our History	/sitecore/content/Home/About-Us/Our History	04-09-2012 13:44:43	sitecore\admin		

2. In the **Recycle** Bin, in the **Options** group, select the **Show Versions** check box and the **Recycle Bin** lists all the deleted versions of the current item.

Drag a column to	this area to group by it	t.		Sea	arch:
Name	Original Location	n		Date	By
Our Ambitions	/sitecore/conten	nt/Home/About-Us/Our Ambitions		04-09-2012 13:44:49	sitecore \admin
Our History	/sitecore/conter	nt/Home/About-Us/Our History		04-09-2012 13:44:43	sitecore\admin
I I	]				Page 1 of 1 (2 items)
	Version	Date	Бу		Page 1 of 1 (2 items)
Language en	1	Date 04-09-2012 13:44:49	sitecore\admin		Page 1 of 1 (2 items)
Language en en	1 2	Date 04-09-2012 13:44:49 04-09-2012 13:44:49	sitecore\admin sitecore\admin		Page 1 of 1 (2 items)
Language en en ja-JP	1 2 1	Date 04-09-2012 13:44:49 04-09-2012 13:44:49 04-09-2012 13:44:49	sitecore\admin sitecore\admin sitecore\admin		Page 1 of 1 (2 items)
Language en ja-JP pt-BR	1 2 1 1	Date 04-09-2012 13:44:49 04-09-2012 13:44:49 04-09-2012 13:44:49 04-09-2012 13:44:49	sitecore \admin sitecore \admin sitecore \admin sitecore \admin		Page 1 of 1 (2 items)
anguage en en a-JP	1 2 1	Date 04-09-2012 13:44:49 04-09-2012 13:44:49 04-09-2012 13:44:49	sitecore\admin sitecore\admin sitecore\admin		Page 1 of 1 (2 items)

3. Select the version of the item that you want to restore and then in the **Items** group, click **Restore** and the item is restored in the content tree.



# 4.5 Archiving

Sitecore also allows you to archive content that you do not want to display on your website. When you archive an item, it is not deleted but instead, it is stored outside the content tree and can be restored at any time.

The Sitecore archive functionality allows you to:

- Archive an entire content item including its sub items.
- Archive individual versions of a content item.
- Specify a date and time when a content item or individual versions of a content item should be archived automatically.
- Restore content items from the Archive.
- Restore individual versions of content items from the Archive.

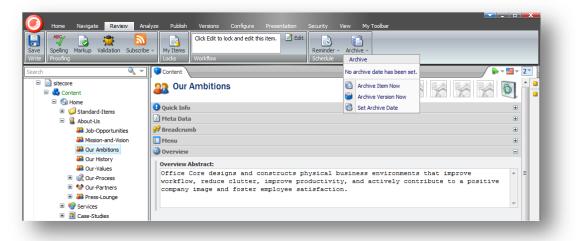
When you archive a content item, it is removed from the content tree, but it remains on the published website. Therefore you must republish the website to ensure that these changes are replicated on the website.

# 4.5.1 Archiving and Restoring a Content Item

In Sitecore, you can archive a content item and then restore it again when you need it.

To archive a content item:

1. In the content tree, navigate to the item that you want to archive.



On the Review tab, in the Schedule group, click Archive and then click Archive Item Now.
 The content item is moved to the Archive.



To restore a content item from the Archive:

1. In the Sitecore Desktop, click the Sitecore Start button and then click All Applications, Archive.

	te Empty rations View Options		
Drag a column to	this area to group by it.	Sea	rch:
Name	Original Location	Date	Ву
Our History	/sitecore/content/Home/About-Us/Our History	04-09-2012 15:23:34	sitecore \admin
Our Ambitions	/sitecore/content/Home/About-Us/Our Ambitions	04-09-2012 15:18:59	sitecore \admin

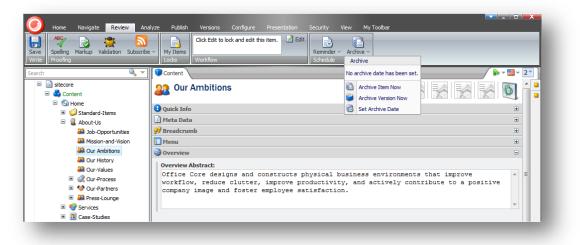
- 2. In the Archive, select the content item that you want to restore.
- 3. In the **Items** group, click **Restore** and the content item is restored in the content tree. You can only restore one item at a time.

## 4.5.2 Archiving and Restoring a Version of a Content Item

In Sitecore, you can archive and restore individual versions of content items.

To archive a version of a content item:

- 1. In the content tree, navigate to the item that you want to archive.
- 2. In the right hand pane, on the **Content** tab, click the **Language** button <sup>■</sup> if you want to archive a version in a particular language.
- 3. Click the **Version** button  $2^{-1}$  and select the version that you want to archive.



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4. On the **Review** tab, in the **Schedule** group, click **Archive** and then click **Archive Version Now** and this version of the current item is moved to the **Archive**.

To restore a version from the Archive:

- 1. In the **Sitecore Desktop**, click the **Sitecore Start** button and then click **All Applications**, **Archive**.
- 2. In the Archive, in the Options group, select the Show Versions check box.
- 3. Select the content item that contains the version that you want to restore and all the archived versions of this content item are displayed in the lower pane.

on age a condimiter to	this area to group by i	t.		Sea	arch:
Name	Original Location	n		Date	By
Our History	/sitecore/conter	nt/Home/About-Us/Our History		04-09-2012 15:23:34	sitecore \admin
Our Ambitions	/sitecore/conter	nt/Home/About-Us/Our Ambitions		04-09-2012 15:18:59	sitecore \admin
14 4	]				Page 1 of 1 (2 items)
	Version	Date	Ву		Page 1 of 1 (2 items)
Language en	1	Date 04-09-2012 15:18:59	sitecore\admin		Page 1 of 1 (2 items)
Language en en	1 2	Date 04-09-2012 15:18:59 04-09-2012 15:18:59	sitecore \admin sitecore \admin		Page 1 of 1 (2 items)
Language en en ja-JP	1 2 1	Date 04-09-2012 15:18:59 04-09-2012 15:18:59 04-09-2012 15:18:59	sitecore \admin sitecore \admin sitecore \admin		Page 1 of 1 (2 items)
Language en ja-JP pt-BR	1 2 1 1	Date 04-09-2012 15:18:59 04-09-2012 15:18:59 04-09-2012 15:18:59 04-09-2012 15:18:59	sitecore \admin sitecore \admin sitecore \admin sitecore \admin		Page 1 of 1 (2 items)
Language en en ja-JP	1 2 1	Date 04-09-2012 15:18:59 04-09-2012 15:18:59 04-09-2012 15:18:59	sitecore \admin sitecore \admin sitecore \admin		Page 1 of 1 (2 items)

4. Select the version that you want to restore and in the **Items** group, click **Restore** and this version of the content item is restored in the content tree.

You can select and restore as many versions of the same item as you want. However, you can only select one item and restore versions of that one item at a time.

## 4.5.3 Automatically Archiving a Content Item

You can also specify a date and time for when a content item should be archived automatically.

To specify when a content item should be archived:

1. Open the **Content Editor**, and in the **Content Tree**, locate the item that you want to archive.



2. On the Review tab, in the Schedule group, click Archive and then click Set Archive Date.

	Webpage Dialo			<b>×</b>
	ive Date and	Time. Ie when the current item w	il bo archivod	
		e when the current tell w	ni be archived.	
rchive Iter ate and time				
	*	~		
rchive Ver	sion			
anguage	Version Date			
en	1	~	~	
en	2	~	~	
en	3	<b>~</b>	~	
ja-JP	1	<b>~</b>	~	
pt-BR	1	~	~	
pt-BR	5	~	~	
zh-CN	1	~	~	
zh-CN	2	~	~	
zh-CN	4	~	~	
Clear all			ОК	Cancel

- 3. In the **Archive Date and Time** dialog box, in the **Archive Item** section, you specify the date and time when you want to archive the entire item.
- 4. In the **Archive Version** section, you specify when you want to archive individual versions of the current item.

The content item or the versions you select are archived on the date and time that you specify.

When you set a date and time, it is important to remember that:

- o If you only specify a date, the item is archived at 12:00 midnight on that date.
- o If you only specify a time, the item is archived at that time on the current date.
- If you specify a date or a time that is in the past, the item is archived the next time that Sitecore checks if there are any items that should be archived.



# 4.6 Cloning Items

Sitecore lets you create clones of items and branches of items. Clones are not just copies of the original item. The fields in clone items are updated when the corresponding fields in the original item are updated.

Cloning items is as a way of centralizing content items. It is a very useful way to place your items throughout the content tree, and then have the content controlled from one central location in the content tree. For example, when you have multiple sites in Sitecore – each for a different country, you can create a master site that contains the common content items for all the sites. Then for every country site, you create a clone of the master site, which means that when you update an item in the master site it is then automatically updated in all the country sites as well.

This section describes how to use the item cloning functionality. In this document, the item that is being cloned is called the *original item*.

# 4.6.1 Creating a Clone of an Item

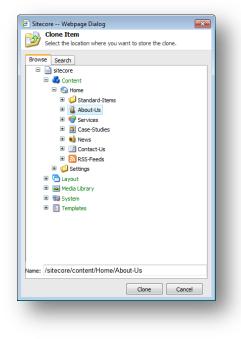
This section describes how to create a clone of an item.

To create a clone of an item:

- 1. In the content tree, select the item that you want to clone.
- 2. On the Configure tab, in the Clones group, click Clone.



3. In the **Clone Item** dialog box, select the location where you want to store the clone. You can navigate to the location in the content tree on the **Browse** tab or search for the location on the **Search** tab.





- 4. Click Clone.
- 5. Sitecore creates a clone item that is exactly the same as the original item.

If you select the clone item, you notice that the field titles have the *[original value]* text added. This means that these values match the corresponding values in the original item.

sitecore	() Quick Info
🖃 🛃 Content	A Breadcrumb
😑 🙆 Home	Menu
Standard-Items	
Products	Page Title and Text
🖃 🚜 Original Product	s Title original value]:
Red Laptop	Red Laptop
Cloned Products	
🚱 Red Laptop	Show Editor · Suggest Fix · Edit Html
Home-Products	Text [original value]:
🗉 💑 Office-Products	

If you select the original item and edit the **Title** field, Sitecore changes the same field in the clone item accordingly. You can create multiple clones of the same item.

For more information about the Sitecore search functionality, see the section Searching in Sitecore.

## **Cloning multiple items**

With the Sitecore search functionality, you are able to clone multiple items at the same time and place the clones in a specific location in the content tree. This can be done using the search operations in Sitecore search.

To clone multiple items using the search operations:

- 1. Click an item in the content tree from where you want to search for the items you want to clone.
- 2. In the editing pane click the **Search** tab.
- 3. In the **Search** field, enter your search keyword and press ENTER. Use the necessary facets or filters to narrow down your search to list only the items you want to clone.
- 4. Click the drop-down arrow to the left of the search field.
- 5. Click Search Operations and then click Clone Results To.

ổ My Recent Searches - List of your rec	ent searches.		
😵 Recently Modified - List of recently m	odified items.		
hecently Created - List of recently cr	eated items.		
🖗 Recent Tabs - List of tabs you have o	pened recently.		
የ Search Filters - List of available sear	ch filters.		
🗞 Search Operations - List of operation	s that you can perform on the	results	
Add Tag	没 Copy to Datasource Query		
Search And Replace	👌 Apply Security Rule		
Clone Results To	🍓 Copy Results To		
Delete Results	🍓 Move Results To		
Publish Items	🌄 Serialize Items		
Apply Campaigns Goals Events To AllItems	Score To All Item	5	
Apply Presentation To All Items			



6. The **Clone Item** dialog box opens, asking you to select the location in the content tree where you would like to clone all the search result items to.

Sitecore Webpage Dialog	<b>X</b>
Select the location where yo	u want to store the done.
Browse Search	
itecore	
🗏 📥 Content	
🗉 🏠 Home	
Gatandard-Item	s
About-Us     Services	
<ul> <li>Services</li> <li>Case-Studies</li> </ul>	
News	
Contact-Us	
E STREET	
Image: Settings	
🗉 🛅 Layout	
🗉 🔤 Media Library	
🗉 🗐 System	
🗉 🗾 Templates	
ame: /sitecore/content/Home/	/About-Us
	Clone Cancel
	Cione Cancel

7. To select the location, on the **Browse** tab, navigate through the content tree or on the **Search** tab to search for it.

For more information about using the Sitecore search functionality and how to clone multiple items, see the section *Searching in Sitecore*.

## 4.6.2 How Clones and Original Items Interact

When you create a clone, Sitecore establishes a connection between the clone and the original item. When you edit the fields of the original item, Sitecore updates the corresponding fields in its clones. If you edit a field in a clone item, and then edit the same field in the original item, a conflict occurs and Sitecore asks you how you want to resolve this conflict.

This section describes some common use cases that demonstrate how clones and original items interact.

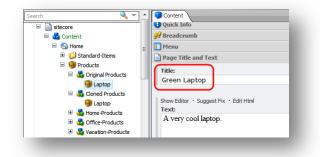
In these examples, we will work with an original item called *Laptop* and its clone. In this screenshot, the clone is selected.

sitecore		U Quick Info
🖃 💑 Content		🔗 Breadcrumb
🖃 🙆 Home	Ξ	🚺 Menu
🗉 🧔 Standard-Items		Page Title and Text
Gright Products     Gright Products     Gright Products     Goned Products		Tittle (original value): Laptop Show Editor · Suggest Fix · Edit Html Text (original value): A very cool laptop.



Now let's see how cloning works.

1. Edit a field in the original item and save it.

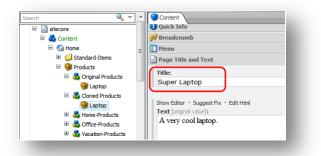


Sitecore updates this field in all the clones of this item.

🗉 📄 sitecore		😉 Quick Info
🖃 🚮 Content		🔗 Breadcrumb
🖃 🚳 Home	=	Menu
🗉 🥥 Standard-Items	-	Page Title and Text
		Title (original value): Green Laptop Show Editor · Suggest Fix · Edit Html Text (original value): A very cool laptop.

Notice the [original value] text on the right side of the field title.

2. Edit a field in the clone and save it. The [original value] text disappears from the title.



The original item has not changed.

3. Edit the same field in the original item.

itecore		U Quick Info
🖃 🚜 Content		🔗 Breadcrumb
🖃 🙆 Home	=	I Menu
🗉 🧐 Standard-Items	-	Page Title and Text
Products     Products		Title: Black Laptop Show Editor · Suggest Fix · Edit Html Text: A very cool laptop.



4. Select the clone. In the **Content** tab, Sitecore displays a message telling you that a field in the original item has been changed and gives you a number of options.

sitecore     Gontent	Laptop
	A field in the original item has been changed. The Title field in the original Laptop item has been changed. Do you want to accept the change?  Breview the original item. Accept the change. Reject the change.
Laptop	U Quick Info
B 👶 Home-Products	🔗 Breadcrumb 🗄
Office-Products	🚺 Menu 🗉
Vacation-Products Services	Page Title and Text
References	Title:
🗉 🥪 News	Super Laptop
🗄 🔳 People 🔹	

### You can:

### • Review the original item

Sitecore selects the original item and you can review the changes.

### • Accept the change

Sitecore copies the values from the fields in the original item to the corresponding fields in the clone item. The *[original value]* text appears next to the field titles.

### • Reject the change

Sitecore keeps the existing field value in the clone item and hides the message.

## 4.6.3 Cloning and Child Items

If you create child items under the original item, Sitecore helps you decide whether or not you want to create clones of these subitems.

To see how it works, let's consider the following scenario:

1. Select the original item and create a child item.





2. Select the clone item.

sitecore		C Laptop
🖃 💑 Content		- abrob
🖃 🙆 Home		A new subitem has been created.
🗉 🧔 Standard-Items		A new subitem has been created under the original item.
Products		Would you like to:
🖃 🚜 Original Products		<ul> <li>Review the new subitem.</li> </ul>
E 🚱 Laptop	=	<ul> <li>Create a done of the new subitem.</li> </ul>
Child Item		<ul> <li>Do not create a done of the new subitem.</li> </ul>
🖃 💑 Cloned Products		Quick Info
🚱 Laptop		<b>99</b> Breadcrumb
🗉 📸 Home-Products		Menu
🗉 💑 Office-Products		Page Title and Text
🗉 🛃 Vacation-Products		Page file and fext
🗉 🤱 Services		Title [original value]:
🗉 强 References		Red Laptop
+ Nown		

In the **Content** tab, Sitecore displays a message telling you that a new subitem has been created under the original item.

The options are:

### • Review the new subitem

If you click this option, Sitecore selects the new subitem and you can review it.

### • Create a clone of the new subitem

If you click this option, Sitecore creates a clone of the new subitem.

#### • Do not create a clone of the new subitem

If you click this option, Sitecore does not create a clone of the new subitem and it hides the message.

## 4.6.4 Cloning and Versioning

When you create a clone of an item that has multiple versions, only the latest version is copied to the clone. For example, if you clone an item that has three versions, the clone will have one version corresponding to version 3 of the original item. If you select the original item and edit version 2, the clone will not reflect those changes because it is connected to version 3.

If you select the clone and add a new version, the new version is connected to the same version of the original item as the previous version of the clone.

The following examples provide more details on how cloning works.

## Adding a New Version to the Original Item

This section describes what happens when you add a new version to the original item.

1. Select the original item and add a new version to it.



2. Select the clone item. Sitecore displays a message telling you that a new version of the original item has been created.

rch <u> </u>	Content Captop	· 2
	A new version of the original item has been created.     A new version (4) of the original item has been created. Do you want to update this done to the new version?     Review the new version.     Update to new version.     Do not update to the new version.	H
Child Item	🕒 Quick Info 🛛 🕀	
<ul> <li>Cloned Products</li> <li>Uptop</li> </ul>	🔗 Breadcrumb 🛨	ī   .
Generation	E Menu E	

The options are:

#### • Review the new version

If you click this option, Sitecore selects the original item.

### • Update to new version

If you click this option, Sitecore copies the new version of the original item and adds it to the clone.

### $\circ$ $\,$ Do not update to the new version

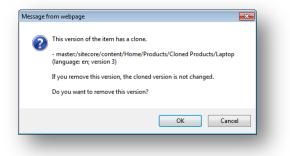
If you click this option, Sitecore does not copy the new version and hides the message.

### **Removing a Version of the Original Item**

This section describes what happens when you remove the version of the original item that is connected to the clones.

- 1. Select the original item.
- 2. Select the version that is connected to clones.
- 3. On the Versions tab, in the Versions group, click Remove.

Sitecore displays the message telling you that this version of the item has a clone.



If you click **OK**, Sitecore removes this version from the original item and unclones all the clone versions that were connected to this version of the original item.

### **Viewing Clones in the Search Results**

In the search results, a clone is represented with an indent and it is displayed at the end of the search results. Furthermore, the item has the **Go To Item Source** quick action assigned to it by default. This



is a shortcut to the original item.

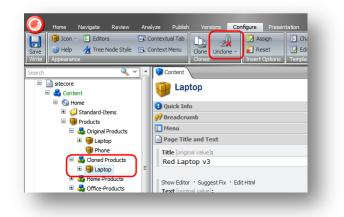
~	Alliance-with-Sheldon-Designs Template: News Article Location: News	
	Version: 1 Created: 2009-06-15 By: sitecore\admin Language: en	
	📑 Translate(ja-JP) en	
	Office-Core-in-Top-5 Template: News Article Location: Home Version: 1 Created: 2013-03-19 By: sitecore∖admin Language: en	
	📄 Go To Item Source 📑 Translate(ja-JP) en	

## 4.6.5 Uncloning an Item

If you no longer want to have a connection between the original item and the clone, you can unclone the clone item.

To unclone a clone item:

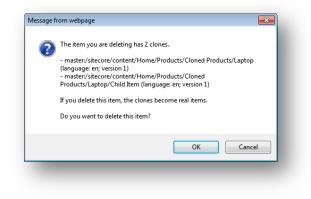
- 1. Select the clone.
- 2. On the Configure tab, in the Clones group, click Unclone.



Sitecore leaves all the fields in the clone as they are and removes the connection between the clone and the original item. The clone becomes a normal item.

## 4.6.6 Deleting an Original Item

If you try to delete an item that has clones, Sitecore displays a message.





In the message, Sitecore lists all the clones of the current item and the clones of its child items. If you click **OK** and delete the item, the clones keep their current field values and become normal items.

When you delete an original item, all its clones are uncloned.

## 4.6.7 Cloning and Workflows

If you clone an item that is in a workflow, the workflow and the Workflow state properties are copied to the clone item. After the workflow fields are copied, the workflow properties of the clone and the workflow properties of the original items are not connected any more. If you change the workflow state of the original item, the workflow state of the clone is not changed.

# 4.6.8 The <u>Source Field</u>

Each version of a clone is connected to a version of the original item. This is defined in the **Advanced** section in the **\_\_\_Source** field.

🗉 📄 sitecore		Advanced
😑 🛃 Content		
🖃 🚳 Home		Source:
Image: Image: Standard-Items		sitecore://master/{7ECB1FC2-911C-47C2-B439-81B81509DF3D}?lang=en&ver=3
Products		
🖃 🚜 Original Products		Standard values [shared, original value]:
🖃 🧐 Laptop		
Child Item		
🖃 🚜 Cloned Products		Profiles · Goals · Attributes
🗉 🧐 Laptop	=	Tracking [shared]:
🗉 🛃 Home-Products		
🗉 🛃 Office-Products		Sitecore Analytics is not enabled.
🗉 💑 Vacation-Products		
🗉 🤱 Services		
🗉 🧕 References		

To view this section, in the View tab, select the Standard Fields check box.



# 4.7 Setting Reminders

In Sitecore, you can send e-mail notifications to multiple users at a specified point in time in the future. This feature is particularly useful if you have time sensitive content on your website. For example, if your website contains a special offer that runs out on a certain time and date, you can use the Sitecore reminder feature to send yourself or others a reminder to remove the offer from the website at the appropriate time.

To set a reminder:

1. In Sitecore Content Editor, on the **Review** tab, in the **Schedule** group, click **Reminder**. In the list of options that opens, select **Set Reminder**.



The Set Reminder Wizard opens.

Welcome to the Set Reminder Wizard.
This wizard helps you:
Enter a text for the reminder.
Select a date and time for the reminder.
Specify who should receive the reminder.
Aways skip the first page of wzards
< Back Next > Cancel

2. In the **Set Reminder Wizard**, on the **Welcome to the Set Reminder Wizard** page, click **Next**, and the **Reminder Text** dialog box opens.

minder Text.			
Enter the text for the reminder. Click Next to	o continue.		ß
Reminder text:			
			^
			-
	< Back No	ext > C	ancel

3. In the **Reminder Text** dialog box, in the **Reminder text** field, enter the text that you want to be sent to recipients as a reminder, and then click **Next**. The **Date and Recipients** dialog box

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opens.

	ents. ate and time when the reminder will be sent. Enter the e-mail addre ick Next to set the reminder.	esses of the
Date:	11/22/2012 Y 8:00 PM Y	
Recipents:	personl@company.com person2@company.com	•
	You can seperate recipients with a semicolon, e.g. person1@company.com;person2@company.com	
	< Back Set	Cancel

- 4. In the **Date and Recipients** dialog box, in the **Date** fields, enter the date and time when the reminder e-mail must be sent. In the **Recipients** field, enter e-mail addresses of the recipients, and then click **Set**.
- 5. On the last page of the **Set Reminder Wizard**, click **Finish** and the reminder is configured.

You can verify when the reminder that you created is going to be sent to recipients. To do this, on the **Review** tab, in the **Schedule** group, click **Reminder**. The reminder details are displayed above the **Set Reminder** option.

teminde	r - Archive -
Remino	ler
A remind	er wil be sent Thursday, November 22, 2012 8:00 PM
	Set Reminder
•	Clear Reminder

To clear the reminder you configured, on the **Review** tab, in the **Schedule** group, click **Reminder**, and then click **Clear Reminder**.

### Note

Currently, you can only configure one reminder. If you already have one reminder, and want to set another reminder, you overwrite the earlier reminder.



# 4.8 Assigning Profile Values to Items

Profile cards are a convenient way of assigning profile values to content items.

After you have created the profile cards and assigned profile values to them, you can start assigning the profile cards to the content items that make up your website. Assigning profile cards to content items makes it easier for you to implement profile values consistently across your website.

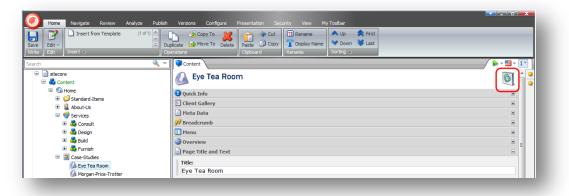
For more information about profile cards, see the *Marketing Operations Cookbook*.

### Note

You can either use the Page Editor or the Content Editor to assign profile cards to content items.

To assign profile values or profile cards to a content item:

1. In the **Content Editor**, navigate to the item that you want to assign a profile card to.



2. On the **Content** tab, click the profile card icon in the top right-hand corner and the **Profile Cards** dialog box appears.

Function Edit Persona Edit	The profile can Click Edit to as	rds that are assigned to the c sign a profile card or change	the profile cards that	at are assigned.	
Persona Edit	Focus	Edit			
	Function	Edit			
Score Edit	Persona	Edit			
	Score	Edit			

3. In the **Profile Cards** dialog box, select the profile that you are interested in and click **Edit** and the **Select Profile Card** dialog box appears.

The **Select Profile Cards** dialog box looks different depending on which option you select in the **Authoring Selection** field in the **Profile Cards** item.

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If you select the *Single* option in the **Authoring Selection** field, the **Select Profile Cards** dialog box looks like this:

rofile Cards	Profile Card Details Custor	nize
Decision Maker		
	Profile Card Values	
	Profile Card Values	
	Background	
	0.80	
	0.60	
	0.40	
	0.20	
	Scope 0.00 Practical	
	Process	

4. Click **Customize** if you want to assign custom values.

## 4.8.1 Assigning Profile Values to Items in Bulk

If you want to assign profile values to multiple items, you can do that based off a search.

For example, if you want to apply the *Focus* profile to all items that contain the word *History*, search for all items that contain the word 'History' and then apply the *Apply Profile Score To All Items* search operation.

For more information using the Apply Profile Score To All Items search operation, see the section Performing Operations on Search Results.



# Chapter 5

# The Rich Text Editor

The Rich Text Editor is the word processing tool that Sitecore uses. This chapter explains some of the functionality that it contains. The topics described in this chapter include inserting, removing, and managing links.

This chapter contains the following section:

• Using the Rich Text Editor

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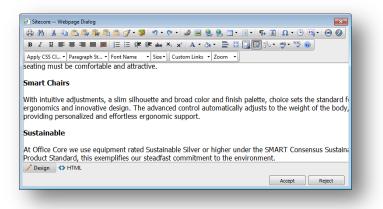


# 5.1 Using the Rich Text Editor

When you are editing a rich text field in the Page Editor or Content Editor, you use the Rich Text Editor. This is a standard word processing tool, but in Sitecore, we have removed most of the formatting functionality because the format of the items that content authors create and edit is determined by the style sheets and templates that have been implemented for your website.

# 5.1.1 Editing Text

To open the Rich Text Editor, place the cursor in a rich text field and Sitecore opens a floating menu, from where you click the **Edit Text** icon . The Rich Text Editor opens displaying the text from the field you clicked.



You can now edit the text and use the functionality that is available.

## Pasting Content from Word

As a content author, you might feel more comfortable writing your content in Microsoft Word. When you have written the text, you can paste it from Word and into the Rich Text Editor. Note that all the information about fonts, sizes, formatting, and so on, is removed once the text is pasted into the Rich Text Editor.

To paste content from Microsoft Word:

- 1. Select and copy all the text in Microsoft Word that you want to paste into a rich text field in Sitecore.
- 2. In Sitecore, place your cursor in the rich text field item that you want to edit and click **Edit Text** is to open the **Rich Text Editor**.
- 3. Click the **Paste Word** button and the text is pasted into the **Rich Text Editor**.

# 5.1.2 Inserting an Internal Link

An internal link is a link to another item on your website.

To add an internal link:

1. In the **Rich Text Editor**, select the image or text that you want to make into a link.



2. Click the Insert Sitecore Link button a.

ternal Link Media Items Search	
initia cirk Media Items Search     isiecore	
E Content	
Government     Government	
Gandard-Items	
H 🍇 About-Us	
🗉 😚 Services	
Case-Studies	
🗉 📦 News	
Contact-Us	
■ SS-Feeds	
🗉 🧐 Settings	
🗷 🖳 Layout	
🗷 🔤 Media Library	
🗷 🖏 System	
🗷 🧾 Templates	
	Link Cancel

- 3. In the **Insert a Link** dialog box, you can select the item that you want to create a link to:
  - By navigating the content tree on the Internal Link tab.
  - o By navigating the content tree on the Media Items tab if the item is a media item.
  - By searching for the item on the Search tab. This can be useful if for example the item is a hidden item in an item bucket. For more information on item buckets, see the section *Item Buckets*.
- 4. Click **Link** to create the link.

## 5.1.3 Inserting an External Link

An external link is a link to another website.

To insert an external link:

- 1. In the **Rich Text Editor**, select the image or text that you want to be a link.
- 2. Click the Insert Link button S.

Hyperlink	Anchor E-mail	
URL	http://	
Link Text	workplaces	
Target	None	
Existing Anchor	None	
Tooltip		
CSS Class	Apply Class 🔹	
	OK Cance	el

3. In the **Hyperlink Manager** dialog box, enter the information about the website that you want to link to.

Field	Value
URL	Enter the URL of the website.

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Field	Value
Document Manager 🗳	Opens the <b>Document Manager</b> dialog box from where you can choose the media item to link to.
Link Text	Enter or edit the link text.
Target	Specify the window in which the link should open.
Existing Anchor	Select an existing anchor. For more information on anchors see the following sections
Tooltip	Enter a tool tip that is displayed when you move the mouse over the link.
CSS Class	Specify the style sheet that the link should use.

# 5.1.4 Managing Hyperlinks

You can also use the **Hyperlink Manager** dialog box to edit existing links, create anchors, and create e-mail links.

## **Creating an Anchor**

An anchor is an HTML code that is used to create a link to another page or to a particular section within a page.

To create an anchor:

- 1. In the **Rich Text Editor**, select the image or text that you want to be an anchor.
- 2. Click the **Insert Link** button **S**.
- 3. In the Hyperlink Manager dialog box, click the Anchor tab.



4. In the **Name** field, enter the name of the anchor.



5. You can now create a link to this anchor by selecting it in the Hyperlink Manager dialog box.

Hyperlink Ma	Anchor E-mail	
URL	#My Anchor	
Link Text	Provide	
Target	None	
Existing Anchor	My Anchor	
Tooltip		
CSS Class	Apply Class 🔹	
	OK Cancel	

## Creating e-mail links

You can also use the **Hyperlink Manager** to create e-mail links. An e-mail link opens a new mail in the program that you use to send e-mail, for example, Microsoft Outlook. The e-mail will be sent to the e-mail address specified in the e-mail link.

To create an e-mail link:

- 1. In the **Rich Text Editor**, select the image or text that you want to be the link.
- 2. Click the Insert Link button S.
- 3. In the Hyperlink Manager dialog box, click the E-mail tab.

Hyperlink Ancl	nor E-	mail	
Address mail@	sitecore.net		
Link Text Conta	t us		
Subject			
CSS Class Apply	Class 🔻		
		ОК	Cancel

- 4. In the Address field, enter the e-mail address that the mail should be sent to.
- 5. In the **Subject** field, enter the text that you want to appear in the subject field in the e-mail.

## 5.1.5 Removing a Link

To remove a link, in the **Rich Text Editor**, select the link and click the **Unlink** button **S**. The link is removed and the text becomes ordinary text.

### Note

You can use the Hyperlink Manager to edit any links that exist on your website.



# **Chapter 6**

# **Item Buckets**

In the Sitecore Content Editor, you can see that all of your content items are stored in the content tree. As your website grows and you create more items, the size of the content tree grows. If you have a website that markets or sells innumerable products or uses an ever-increasing number of media files, the content tree will grow continually. As the content tree grows, it gets more difficult to locate individual content items, and performance can decrease.

Item buckets is a system that lets you store an unlimited number of content items in one container that you can then search in to find specific content items. The item buckets feature is primarily designed for storing content items that do not need to be stored in a hierarchy.

This chapter contains the following sections:

- Fundamental Concepts
- Working with Item Buckets



# 6.1 Fundamental Concepts

This section explains some of the basic concepts used in the item buckets feature.

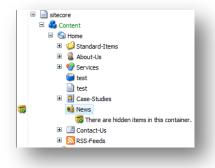
## 6.1.1 Item Bucket

An item bucket is a repository in the content tree that can store content items. The difference between an item bucket and a regular container in the content tree is that an item bucket can store a theoretically unlimited number of items without displaying them in the content tree.

The items in an item bucket are hidden in the content tree by default, which is why you cannot use the content tree to navigate and select these items. Instead, you can search for and open items that are stored in an item bucket.

The parent-to-child relationship between the content items in an item bucket is completely removed and the items are automatically organized in a folder structure. By default, the items are organized according to the date and time when they were created. However, you can configure your Sitecore solution to organize the bucketed items differently, for example by their globally unique identifier (GUID).

To get an overview of the containers that are item buckets in the Content Editor, right-click the Quick Action Bar to the left of the content tree and select Item Buckets. An icon is now displayed beside each item bucket in the content tree. Furthermore, if you expand an item bucket in the content tree, you will also see a visible cue that the container is an item bucket. If the items in an item bucket are hidden, a small notification tells you that there are hidden items in the container.



When you want to work with a specific item placed in an item bucket, you need to search for it and open it from the list of search results. The advanced Sitecore search functionality allows you to search among all the items in Sitecore using, for example, free text, search filters, or facets that make it easier for you to find exactly what you need.

For more information about using the search functionality, see the section Searching in Sitecore.

## Why Use an Item Bucket?

An item bucket addresses the problem of managing large numbers of items within the content tree, retrieving them, and working with them in a speedy and efficient manner.

Using item bucket has many advantages, including:

- All the content items in an item bucket are automatically organized in a logical format that increases the performance of the search engine.
- A single item bucket can contain millions of content items without slowing down the UI or congesting the content tree.
- You can have as many item buckets as you want. This is useful if you want to split up your item buckets into logical containers for example one for products and one for articles.

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To decide if you should turn an item into an item bucket, and in turn, hide all its descendants, you must ask yourself if you care about the structure of the data that is stored in the item bucket.

For example, if you have items that contain a large number of subitems it may be advantageous to turn these items into item buckets and thereby remove the need for hierarchically managing the content. The connection between two or more items does not necessarily have to be hierarchical.

## 6.1.2 Items in an Item Bucket

An item bucket can contain both normal content items and bucketable content items.

- Normal content items stored in item buckets are visible in the content tree and maintain their parent child relationship. A normal content item is based on a template that doesn't support item buckets.
- Bucketable items are hidden in the content tree and do not maintain their parent child relationship. A bucketable item is based on a template that supports item buckets.

### Note

You should not store both normal and bucketable items in an item bucket. This can introduce unnecessary complexities for the developers.

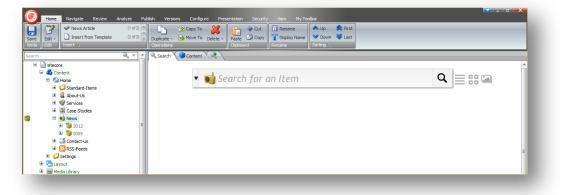
## Viewing Hidden Items

If you need to view the bucketable items that are hidden in an item bucket, in the Content Editor, on the **View** tab, in the **View** group, select the **Buckets** check box.

However, you should clear the **Buckets** check box when you work with item buckets. This prevents the system from unnecessarily loading all the items in the content tree and thereby slowing down performance. Remember that you can still work with the hidden content items by searching for them on the **Search** tab that is available for every item bucket.

# 6.1.3 Searching in Item Buckets

Once you start using item buckets, you will soon have buckets that contain hundreds if not thousands of hidden content items. When you convert a content item into an item bucket, the item displays the **Search** tab in the editing pane.



On the **Search** tab, you can search through all the items in an item bucket, whether they are hidden items (bucketable) or normal content items. Sitecore offers a wide range of search filters, search operations, and facets that can help you to quickly find the content item that you are looking for.

For more information about the search functionality, see the section Searching in Sitecore.



# 6.2 Working with Item Buckets

This section describes how to work with item buckets. You can create an item bucket from *any* item, whether it is a new content item or an existing content item that you convert into an item bucket.

Content items that are stored in item buckets are just like any other content items — you can create, edit, and delete them.

When you convert a content item into an item bucket, the item bucket organizes and hides all its descendants if they are bucketable items or based on templates that are bucketable. When you convert an item that contains many subitems into an item bucket, it can take a long time to organize the items. A progress bar appears displaying a running tally of the items being processed. During the bucketing process, you can cancel the construction of the item bucket before the organizing of the items is complete.

### Note

On a standard PC, organizing 1000 items into an item bucket takes approximately 5-10 mins.

# 6.2.1 Creating an Item Bucket

You can create an item bucket from a new content item or convert an existing item into an item bucket.

To create an item bucket:

1. In the **Content Editor**, in the content tree, create a content item, for example a folder, and give it a suitable name.

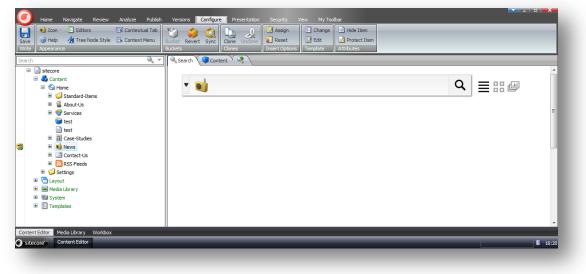
Alternatively, select an existing content item.

- 2. On the Home tab, click Edit to lock the item.
- 3. Click the **Configure** tab and then in the **Buckets** group, click **Bucket** to convert the item into an item bucket.





When you convert a content item into an item bucket, a new Search tab appears in the content area.



You use this tab to search for the content items in the item bucket.

For more information about the Sitecore search functionality, see the section Searching in Sitecore.

## Enabling the Item bucket Icon in the Quick Actions Bar

In the Quick Action Bar, you can enable the item buckets icon, to indicate which content items in the content tree are item buckets.

To display the item buckets icon, right-click the quick action bar to the left of the content tree, and select **Item Buckets**.

## 6.2.2 Reverting an Item Bucket to a Normal Container

After you have implemented an item bucket and stored some bucketable items in it, you may decide that this is not the correct structure for these items and want to turn the item bucket back into a normal content item.

To revert an item bucket to a normal container:

- 1. In the **Content Editor**, navigate to the item bucket that you want to convert into a normal container.
- 2. On the Configure tab, in the Buckets group, click Revert.

The item bucket reverts to being a normal container, and all of the subitems are displayed as normal structured items.

Structured items are listed hierarchically in the content tree and automatically maintain their parent-child relationship with their ancestors and descendants.

If you have many items stored in an item bucket, this may take some time.

## 6.2.3 Making a Content Item Bucketable

A bucketable item is an unstructured item that is stored and hidden in an item bucket.

Unstructured items are not listed hierarchically and do not maintain their parent-child relationship with their ancestors and descendants unless you specify that they should do so.

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There are two ways to make a content item bucketable. You can:

- Make the individual content item bucketable.
- Make the template that the content item is based on bucketable.

When you make the template bucketable, all the items that are based on this template are stored as unstructured, hidden items in *all the item buckets* that they are in after you synchronize each item bucket.

## Making an Individual Content Item Bucketable

You can store an individual content item as an unstructured item in an item bucket.

To make a content item bucketable:

- 1. In the **Content Editor**, select the content item that you want to store in an item bucket.
- 2. On the **Configure** tab, in the **Bucketable Settings** group, select the **Current Item** check box.

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8	sitecore	<u> </u>	enu ews									
E	E 🕤 Home		verview	-	-	-	-	-	-	-	-	_

3. In the content tree, select the item bucket that this item is stored in, and then in the **Buckets** group, click **Sync**.

This completes the process and hides this content item in the item bucket.

## Making a Bucketable Content Item into a Normal Content Item

Before you can turn a bucketable item into a normal content item, you must search for and select it.

To turn a bucketable item into a normal content item:

- 1. Select the item bucket that contains the item that you want to convert. On the **Search** tab, in the search field, enter a word that will identify the item.
- 2. In the search results, select the item.
- 3. On the **Configure** tab, in the **Bucketable Settings** group, clear the **Current Item** check box and then synchronize the item bucket.
- 4. Select the item bucket that this item is stored in and in the **Buckets** group, click **Sync**.

The item now appears as a normal content item in the content tree.

### Making a Template Bucketable

If you have a large number of similar content items that you want to hide in an item bucket, you should make the template that they are based on bucketable.

You can make a template bucketable in the Content Editor and in the Template Manager.

To make a template bucketable in the Content Editor:

- 1. In the **Content Editor**, navigate to one of the content items that you want to store in an item bucket.
- 2. On the **Configure** tab, in the **Bucketable Settings** group, select the **XXX Template** check box to make every item based on this template bucketable.

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This check box always displays the name of the template that the current content item is based on.

3. In the content tree, select an item bucket that contain items based on this template, and then in the **Buckets** group, click **Sync**.

The content items that are based on this template are now hidden in the item bucket.

4. Synchronize all the item buckets that contain items based on this template

To make a template bucketable in the Template Manager:

- 1. In the **Template Manager**, in the content tree, select the template that you want to make bucketable.
- 2. Expand the template and select the \_Standard Values item.
- 3. On the **Configure** tab, in the **Bucketable Settings** group, select the **Current Item** check box.

After you have made the template bucketable, you must synchronize every item bucket that contains content items that are based on this template. This updates their structure and hides the bucketable items in the content tree.

If you create any content items based on this template in another folder that is not an item bucket, these items are treated like normal content items and are displayed in the content tree.

## Changing a Bucketable Template into an Normal Template

You can also change a bucketable template back into a normal template. You can do this in the Content Editor and in the Template Manager.

To change a bucketable template back into a normal template in the Content Editor:

- 1. In the **Content Editor**, select an item that is based on the template that you want to change.
- 2. On the **Configure** tab, in the **Bucketable Settings** group, clear the **XXX Template** check box to change the bucketable template back to a normal template.
- 3. Select an item bucket that contains content items based on this template and on the **Configure** tab, in the **Buckets** group, click **Sync** to synchronize the item bucket.

When synchronization is complete, all the content items that are based on this template are displayed as structured items in the item bucket that you synchronized.

You must synchronize each item bucket that contains content items based on the template that you changed.

To change a bucketable template back into a normal template in the Template Manager:

- 1. In the **Template Manager**, in the content tree, select the template that you want to change.
- 2. Expand the template and select the \_Standard Values item.
- 3. On the **Configure** tab, in the **Bucketable Settings** group, clear the **Current Item** check box to change the bucketable template to a normal template.
- 4. In the **Content Editor**, select an item bucket that contains content items based on this template and on the **Configure** tab, in the **Buckets** group, click **Sync** to synchronize the item bucket.

When synchronization is complete, all the content items that are based on this template are displayed as structured items in the item bucket that you synchronized.

You must synchronize each item bucket that contains content items based on the template that you changed.

### Note

You can also make a template bucketable or unbucketable by selecting or clearing the **Bucketable** check box in the **Item Buckets** section of the \_*Standard Values* item for this template.

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## Synchronizing an Item Bucket

After you make an individual content item bucketable or make the template that the content item is based on bucketable, you must synchronize the item bucket.

Whenever you change the bucketable settings for the items in an item bucket, you must synchronize the item bucket to make sure that all the items are organized correctly.

You should synchronize an item bucket when you:

- Make a normal content item that is stored in an item bucket into a bucketable item.
- Make a bucketable content item into a normal content item.
- Make a template bucketable.
- Change a bucketable template into a normal template.
- Delete an item from the item bucket.

To synchronize an item bucket:

- 1. In the **Content Editor**, select the item bucket.
- 2. On the **Configure** tab, in the **Buckets** group, click **Sync**.

The structure of the contents in the item bucket is now updated:

- The bucketable items are organized and hidden.
- $\circ~$  All the content items in this item bucket that are based on bucketable templates are organized and hidden.
- The normal content items remain visible.

You can now search for all the content items in the item bucket. For more information about searching in Sitecore, see the section *Searching in Sitecore*.

If the process of making an item bucketable fails, synchronize the item bucket and the process will pick up where it left off.

## 6.2.4 Creating a Content Item in an Item Bucket

You create a content item in an item bucket in exactly the same way as you would create an ordinary structured content item.

To create a content item in an item bucket:

- 1. In the **Content Editor**, in the content tree, select the item bucket that you want to create an item in.
- 2. On the **Home** tab, in the **Insert** group, click the type of item that you want to create.
- 3. In the dialog box that opens, enter the name of the new item. Click **OK** and the content item is created in the item bucket and available in the search results of the item bucket.

The new content item is automatically selected in the Content Editor.

4. Save your changes.

If the template that the item is based on is bucketable or if the item itself is bucketable, the item is hidden in the item bucket and you cannot see it. If the item or the item's template is *not* bucketable, the item is visible in the item bucket.

Consequently, you can have an item bucket that is a hybrid of structured and unstructured content items.

For more information about making a content item bucketable, see the section *Making a Content Item* Bucketable.

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# 6.2.5 Tagging Items

Tagging items is a great way to categorize the potentially millions of items in an item bucket. If you tag your items, you get a quick way to search for specific categories of items in an item bucket.

The tags that are available to you are defined by your administrator, and you can add them in the tagging section on the Content tab of the item.

To add a tag to an item:

1. In the **Content** pane of the item, find and expand the **Tagging** section.

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nantics:		
	Selected	
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assic (Tag - TagRepository)	Contemporary (Tag - TagRepository) EcoDesign (Tag - TagRepository)	🕥
uturistic (Tag - TagRepository)	G EcoDesign (Tag - TagRepository)	
inimalistic (Tag - TagRepository)	5 ( 5 5 1 3)	
		·

- In the list on the left, you can either search for a specific tag in the search field or manually select a tag from the list of available tags. You can use SHIFT or CTRL to select multiple tags.
- 3. When you have selected the necessary tags, click the <sup>(c)</sup> arrow to move them to the **Selected** list.

To remove tags from the **Selected** list, click the G arrow or double-click a single tag to move it from one field to the other.

4. Click Save.

Now you can use the **Search by Tag** search filter when you search for items in an item bucket. For more information on using search filters, see section *Search Filters*.

## 6.2.6 Deleting a Content Item from an Item Bucket

As you work with your website, you will need to delete content items that are stored in an item bucket.

To delete a content item from an item bucket:

- 1. In the **Content Editor**, in the content tree, select the item bucket that contains the item that you want to delete.
- 2. On the **Search** tab, in the search field, enter a search term that will help identify the content item that you want to delete.



3. In the search results, click the content item that you want to delete and it is displayed in a new tab.

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earch	Q	V Search Dia Norman Content Co
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	<ul> <li></li></ul>	Image: Save Save/Close         Image: Save Save/Close         Image: Save Save/Close         Image: Save Save/Close         Image: Save/Save/Close         Image: Save/Save/Save/Save/Save/Save/Save/Save/
	<ul> <li>Case-Studies</li> <li>News</li> <li>Contact-Us</li> </ul>	Content Wy News Article
	RSS-Feeds     Settings     Media Library	Quick Info  Preadcrumb
		Menu News

- 4. On the tab that displays the content item, on the **Home** tab, in the **Operations** group, click **Delete** and the item is deleted.
- 5. In the content tree, select the item bucket that contained the item, and on the **Configure** tab, in the **Buckets** group, click **Sync.**

## 6.2.7 Restoring a Deleted Item to an Item Bucket

If you regret deleting an item from an item bucket, you can restore the item from the Sitecore Recycle Bin. Remember also to rebuild the search indexes to ensure that the restored items appear in the search results.

To restore a deleted item:

1. In the Sitecore Desktop, click Sitecore, Recycle Bin.

Recycle Bin       Restore       Delete       Empty       Coperations	Show Versions
Drag a column to this area to group by it.	
Name	Original Location
News Articles are Bucketable	/sitecore/content/Home/News/2012-10-17-10-56/News Articles are Bucketable

- 2. In the Recycle Bin, select the content item that you want to restore.
- 3. Click **Restore**, and the item is restored in the content tree in the item bucket from where you deleted it.

To rebuild search indexes:

- 1. In the Sitecore Desktop, click Sitecore, Control Panel.
- 2. In the **Control Panel**, click **Indexing**, **Indexing Manager** and the **Rebuild Search Index Wizard** opens.



This wizard guides you through the process of rebuilding the search indexes. There are three search indexes – one for each database in Sitecore:

- sitecore\_core\_index
- sitecore\_master\_index
- sitecore\_web\_index
- 3. When the wizard is finished, you can see the restored item in the search results for the appropriate item bucket.

#### Note

We recommend rebuilding indexes when you have made significant changes in Sitecore, such as adding or deleting thousands or millions of items. The purpose of rebuilding indexes for searching is to optimize the performance of the search.

For more information about rebuilding the search indexes, see the manual *Sitecore Search and Indexing*.

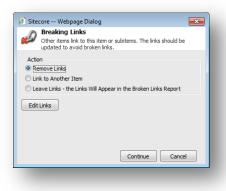
## 6.2.8 Deleting an Item Bucket

If you delete an item bucket, *all* the items in the bucket, whether they are hidden or visible, are deleted as well.

When you delete items in Sitecore, you need to decide what to do with the links that break when you delete the content item.

You can choose to:

- Remove the broken links
- Link to another item
- Leave the links and manage them via the broken links report



## 6.2.9 Restoring an Item Bucket and its Content Items

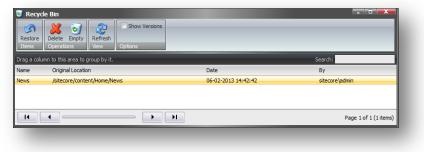
You can restore a deleted item bucket and the content items that it contains to the original location in the content tree. This can be done from the **Sitecore Recycle Bin**. Only by restoring the item bucket can you restore its subitems.

To restore an item bucket:

1. In the Sitecore Desktop, click the Sitecore Start button, and then click Recycle Bin.



2. Select the item bucket from the list of deleted items and click Restore.



- 3. To view the restored item bucket in the content tree refresh the node in which the bucket is located.
- 4. Rebuild the search indexes from the control panel, to make the restored items available for search again.

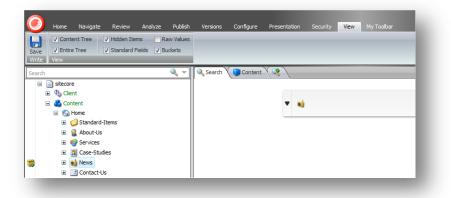
For more information about rebuilding indexes, see the section *Error! Reference source not found.* 

## 6.2.10 Showing and Hiding Bucketable Items

By default, every content item that is based on a bucketable template is hidden in the content tree. However, you can make these content items visible if you need to see them.

To view the bucketable items in the content tree:

- 1. In the Content Editor, click the View tab.
- 2. In the View group, select the Buckets check box.



Now, when you expand an item bucket, all of the items that it contains are displayed in the content tree in a folder structure that is based on the date and time when the items were created.

3. To hide the items again, clear the **Buckets** check box.

#### Note

We recommend that you hide the content items that are stored in the item buckets. This improves performance and ensures that your content tree is more manageable.

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# **Chapter 7**

# Searching in Sitecore

With the Sitecore search engine you are able to quickly search for items in Sitecore using advanced search functionality such as search filters and facets.

This chapter contains the following sections:

- Overview
- Basic Searching
- Pre-defined Search Options
- Using Item Quick Actions
- Using Special Characters in the Search Query
- Filtering Search Results Using Facets
- Search Filters
- Performing Operations on Search Results
- Saved Searches



# 7.1 Overview

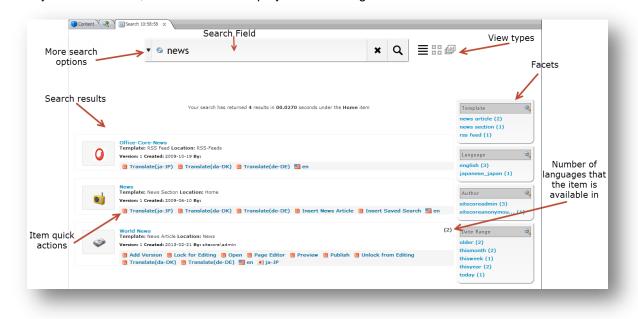
The Sitecore search engine can be accessed from every item in the content tree in the Content Editor or from the ribbon in the Page Editor. In the Content Editor, item buckets open directly on the search tab, because you need the search functionality to find and open the items that are hidden in an item bucket.

#### Note

The administrator sets up the search engine and determines, for example, which search views and facets are available to you and whether or not you are able to see media items in the search results.

## 7.1.1 Searching in the Content Editor

In the Content Editor a search tab is displayed next to the content tab of every item. When you click the search tab a new search tab opens displaying the time of the search. This gives you a nice reference to a specific search in case you open multiple search tabs or if you want to save a specific search. The search runs through the selected item only.



After you run a search, the **Search** tab displays the following elements:

#### Search Field

In the search field, you enter the search query for your search. You can either enter free text or use pre-defined search filters, or a combination of both. You can access the search options from the drop-down menu.

#### **Search Results**

When you run a search, the results are listed below the search field. The search results contain basic information about the items returned, such as title, template, and version to give you a quick overview. From the list of search results you can click an item to open it in a new tab in the editing pane.

#### **View Types**

There are several ways to view the search results and these views are available to the right of the search field. Note that if you change view types, the search is run again based only on the text and filters in the search field. The default views are List view, Grid view, and Image view  $\equiv \square \blacksquare \blacksquare$ . If necessary, your administrator can activate several other views such as Tag view or Table view.



### Item Quick Actions

There are a number of item quick actions available for each search result. These are shortcuts to the most common actions. For example, there is an item quick action that lets you publish an item directly from the list of search results. The Item Quick Actions are only available from a search you do from the Content Editor.

### Facets

A facet is a way of categorizing the items returned by a search. The items can be classified by for example author, language, or when they were created. Once you have a list of search results you can use the facets to filter the results further.

#### **More Search Options**

If you click the down-down arrow to the left of the search field, you open a list of pre-defined search options that you can use to optimize and quicken your search. You can for example open an item from a list of the most recently modified or opened items, select one of the pre-defined search filters, or apply one of the search operations to all the items returned by the search. These options are all described in detail in the following sections.

## 7.1.2 Searching in the Page Editor

In the Page Editor, click the search icon <sup>Sea</sup> in the ribbon to open a search window. When the **Navigate to Item** dialog box opens, the search interface displays a list of all the content items.

The Page Editor's search interface is almost identical to the one in the Content Editor. The only difference is that, after you have searched for and found the item you would like to work on, you must select the item and then click **OK** to navigate to the item in the Page Editor.

	Content   0de95ae441ab4d019eb067441b7c2450 ×		
	Your search has returned 4 results in $00.0155\ \text{seconds}$ under the $current\ \text{item}\ \text{item}$	Template news article (2) news section (1)	
0	Jiffee-Core-Hees Implet: RSS Feed Location: RSS-Feeds Arminn : Created: 2009-10-19 Byr B Translate(Ja-DP) B Translate(da-DK) B Translate(de-DE) B en	rss feed (1) Language english (3) japanese_japan (1)	
V V	Viorid Ress         (2)           Version 1 Costedin 2013-02-11 By staccoldarini         (2)           Add Version 2 Lock for Editing 2 Open 2 Page Editor 3 Preview 3 Publish 3 Unlock from Editing 7 Ironslate(de-DK) 1 Ironslate(de-DK) 2 Ironslate(de-DK) 2 Ironslate(de-DK) 3 Ironsl	Author sitecoreadmin (4)	Ĵ
V V	World News         (2)           Femplate Nac Article Location: News         (2)           Section 1 Createds 2013-02-23 By: sitescelulation         (3)           Add Version 2 Lock for Caliting 0 Open 0 Page Editor 0 Preview 0 Publish 0 Unlock from Editing         (3)           Translate(do:N) 0 T	Date Range older (2) thismonth (2) thisweek (1) thisyear (2) today (1)	



# 7.2 Basic Searching

To run a basic search:

- 1. In the Content Editor, navigate to the item in the content tree from where you would like to run your search.
- 2. For item buckets the **Search** tab opens by default.

```
If you choose a different item, in the editing pane, click the Add a Search tab tab <sup>(S)</sup> to open a search tab.
```

```
Note
```

You can also launch a new search tab by right-clicking an item in the content tree and then clicking **Search**.

3. In the **Search** field, enter the keyword you want to search for.

Tip

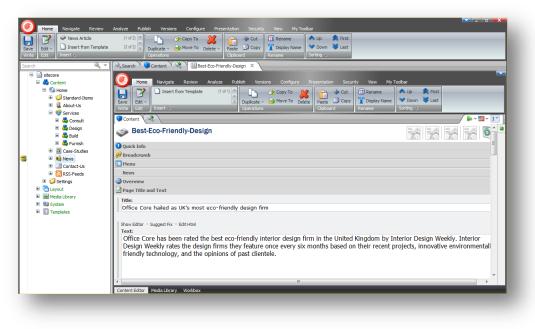
Enter \* in the **Search** field and the search returns all the items within the item you have selected.

4. Press **Enter** or click the search button  $\bigcirc$  and the search results are listed on the page.

If you want to change the view of the search results, click one of the view icons to the right of the **Search** field. If you change the view, it launches the search again, based only on the keywords and filters in the **Search** field.

## 7.2.1 Opening Items from the Search Results

To open an item that appears in the search results, simply click the title of the search result and it opens in a new tab in the Content Editor.





You can also use the item quick actions in each search result to, for example, open the item in a specific language, in the Page Editor, or to lock it for editing.

	study 3	<b>x</b> (	<b>२</b>	
	Your search has returned <b>3</b> results in <b>00.0158</b> seconds under the <b>Home</b> item			Template about us descrip (1) client descripti (1)
22	Brochure-Downloads Template: About Us Description Location: Press-Lounge Version: I Created: 2009-06-10 By: Translate(ja-JP) Translate(da-DK) Translate(de-DE) en			service descript (1) Language english (3)
	Republic-of-Plush Template: Clent Description Location: Case-Studies Version: 1 Created: 2009-06-14 By: Translate(dc-DE) Translate(da-DK) Translate(de-DE) en			Author sitecoreadmin (3)
<b>I</b>	Ergonomics Templet: Service Description Location: Consult Version : Created: 2009-06-10 By:		(2)	Date Range older (3)
	📑 Translate(ja-JP) 📑 Translate(da-DK) 🔄 en 💻 de-DE			

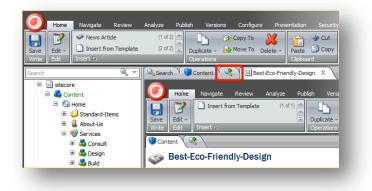
The options that are available in the item quick action bar are determined by the administrator. For more information about using the item quick actions, see the section *Using Item Quick Actions* 

## Working with Multiple Tabs

When you click an item in the list of search results, it opens on a new tab. This allows, you to work on one content item while having as many other tabs or items open in the editing pane as you need. For example, if you are working on several content items at the same time, you can now have them all open in the same editing pane. All the open tabs persist, even if you select a different item in the Content Tree.

Sitecore also supports multiple search tabs, which means that you can open multiple content items from a search tab in the same editing pane, while keeping the first search results available.

To open another **Search** tab, in the editing pane, click the **Add a Search Tab** 12 tab.



## Managing Multiple Tabs

When you are working with many tabs at the same time, Sitecore offers a quick way to close tabs, bookmark them, or refresh the content on a tab. Note that this functionality is only available on the search tabs that you open manually and are specified with a time stamp. You *cannot* use this functionality on the permanent **Search** tab that is displayed with an item bucket or the **Content** tab.



To manage multiple tabs:

1. Right-click a new search tab and a menu appears.

Content 🤇 🤻 🔟 Search	Close All
	Close All But This
•	Close Tabs To Right
	Bookmark All
	Refresh
L	

- 2. The menu contains the following options:
  - **Close All** closes all the extra search tabs. It does not close the **Content** tab or the permanent **Search** tab.
  - Close All But This closes all the extra search tabs except from the current tab.
  - Close Tabs to Right close all the extra search tabs to the right of the current tab.
  - Bookmark All saves all open tabs in the Recent Tabs drop-down menu on the Search tab.
  - Refresh refreshes the item in the tab. This is useful when an item has been modified, but the tab has not yet been updated. Use refresh if you, for example, add a new tag to the tag repository and you would like to use the new tag right away.



# 7.3 Pre-defined Search Options

To ease the everyday work in Sitecore, the search functionality collects information on your recent search activity and which items have been created or modified recently. With these pre-defined search options you can quickly get to the items that you regularly work on regardless of which content item is selected in the content tree.

• 🔰	Q	≡ :: @
🐝 My Recent Searches - List of your recent searches.		
😪 Recently Modified - List of recently modified items.		
Recently Created - List of recently created items.		
📁 Recent Tabs - List of tabs you have opened recently.		
🎙 Search Filters - List of available search filters.		
🗞 Search Operations - List of operations that you can perform on the results		

The pre-defined search options include:

- Your recent searches.
- Recently modified items.
- Recently created items.
- Your recently opened tabs.

To open items from a pre-defined search option:

- 1. Click the drop-down arrow on the left side of the Search field.
- 2. Expand one of the search options to see a detailed list of the content items that are listed for that specific search option.

	• 📦		×	Q
	🐝 My Recent Searches - L	ist of your recent searches		
Author	🞲 Recently Modified - List of recently modified items			
About Us Desc	📦 News	🏭 Corporate News		
News Article/ News Section/	🙆 Home	🖄 Corporate News		
	Latest News			
Template				
About Us Desc	Recently Created - List of recently created items			
News Article ( News Section	Second Tabs - List of tabs you have opened recently			
	🏆 Search Filters - List of	available search filters		
Language	Search Operations - List of operations to perform on the result/s			

3. Click the link to a content item to open it in a new tab in the editing pane.

However, if you click a search query under **My Recent Searches** the query is inserted in the search field, so that you can run the search again by clicking the search icon. You can enter more than one search query from **My Recent Searches**.

#### Note

The default options that are available in the drop-down menu can be customized by your administrator.



# 7.4 Using Item Quick Actions

When you have made a search, the list view displays the items with a number of item quick actions. These item quick actions are shortcuts to common tasks that you can perform when working with the items.

#### Note

The quick actions are only available in the Content Editor.

In the following screenshot, you can for example lock or unlock the item for editing, create a new version, preview the item, or publish the item directly from the search tab.

World News Template: News Article Location: News Version: I Created: 2013-02-21 By: sitecore\admin	(
Add Version Lock for Editing Open Page Editor Preview Publish Unlock from Editing Translate(zh-SG) Translate(de-DE) en ja-JP	

#### Note

The administrator determines which item quick actions are available. The item quick actions are set up on the item itself or on the template that the item is based on.

## 7.4.1 Manual and Dynamic Item Quick Actions

An item can have item quick actions that are set manually by your administrator on for example the item's template, or dynamic item quick actions that appear because of the nature or status of the item — a context aware item quick action.

For example, in the following screenshot, the *Sample Item* has the **Configure Standard Values** item quick action.

	Sample Item Template: Template Location: Sample	(4	
	Version: 1 Created: 2008-03-28 By: sitecore\admin		
_	📑 Configure Standard Values 📑 Insert Template section 📑 en 💽 ja-JP 💻 de-DE 🚼 da		

This item quick action is only relevant for template items. Another example is items that are part of a workflow for which there are item quick actions that you can use to push the items through the workflow.



# 7.5 Using Special Characters in the Search Query

An item bucket can contain thousands of items, and it is therefore important for content authors to know how to make accurate searches and limit the search results to the most relevant items.

As well as using quotation marks — "text" — to search for an exact word or phrase, Sitecore supports wildcards, replacements, and range searches.

## 7.5.1 Wildcards and Replacements

To help you search in Sitecore, you can use wildcards and replacements. The following symbols are supported by Sitecore and can be used in a basic search or within a pre-defined search filter as needed.

- The \* symbol is used to find every form of a word. You can use the symbol inside a word, at the beginning or end of the word, or a combination thereof. For example:
  - Searching for econom\* will find "economy", "economics", "economical", and so on.
  - Searching for \*graph\* will find "paragraph", "paragraphing", "graphic", and so on.
  - Using \* by itself brings up all items within the item you have selected.
- The ? symbol is used to replace any single character, either inside the word or at the beginning or end of the word. For example:
  - Searching for "t?re" will find "tire", "tyre", "tore", and so on.

## 7.5.2 Searching within a Range

If you need to search within a range, Sitecore supports both numerical and text range searches.

For example:

- price:[400 TO 500]
- title:[algeria TO bahrain]

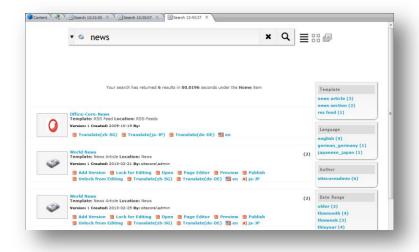
#### Note

A developer can add a slide control with a pre-defined range, which makes it easier for you to see and search within the accepted range.



# 7.6 Filtering Search Results Using Facets

If your search gives too many results, you can quickly refine the search by using the facets that are available on the right of the search pane.



A facet is a way of categorizing the items that are returned by a search. The items can be classified by for example author, language, or when it was created. There are several pre-defined facets and these can be applied directly to a content item, an item template, or to an item bucket by an administrator.

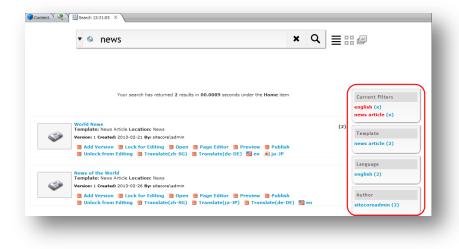
When you run a search, a search on the facets is also performed. All the facets that have been applied to the items returned by the search are listed on the right of the **Search** page.

#### Example:

In the previous screenshot, the facets show that for the six results returned by the search, three are based on the *news article* template, four are in English, and all are created by the user sitecoreadmin.

To sort the search results according to a facet, click a filter in the facet and the search results are filtered according to that facet. When you select a facet, it is marked in red and listed under **Current Filters**.

In the following screenshot, the *english* and *news article* facets have been selected, and only two items match that filter.





To clear a facet and remove the filter from the search results, in the **Current Filter** facet, click the facet you want to remove.



# 7.7 Search Filters

To limit the search results, you can insert one or more pre-defined search filters into the search field.

• 🖬	(
🐟 My Recent Searches - List of y	our recent searches
Recently Modified - List of rea	cently modified items
Recently Created - List of rece	ently created items
📁 Recent Tabs - List of tabs you	have opened recently
🂎 Search Filters - List of availab	le search filters
Search by Author	🔍 Search by a Field Value
濲 Log Search (1 is on)	🗿 Return Results up to Date
Filter by Extension	• Search by ID (Max 1 Result)
Search by Lanuage	🐌 Set Search Start Point (ID)
Search by Site	🍄 Sort by Field
🗓 Return Results starting Date	👗 Search by Tag
Search by Template	🎾 Search by Raw Text
🔚 Search by Version	
	erations to perform on the result/s

To use search filters:

- 1. Click the drop-down arrow on the left of the **Search** field.
- 2. Expand the Search Filters option and select the required filter.

The following search filters are available:

Search Filters	Description
Search by Author	Search for the items created by a specific author.
Log Search (1 is on)	Turn on logging for a single search query. This is only meant to be used by developers and administrators.
Filter by Extension	Search for items with a specific extension. This is useful when searching in the Media Library.
Search by Language	Search for items in a specific language.
Search by Site	Search for items on a specific site. Useful when you have multiple sites on the same Sitecore installation.
Return Results Starting Date	Search for items that were created on <i>or</i> after a specific date.
Search by Template	Search for items based on a specific template.
Search by Version	Search for items with a specific version number.
Search by a Field Value	Search for items with a specific value in a specific field. For example, to search for all the items that have the word <i>design</i> in the <b>Title</b> field, enter <i>custom:title</i> / <i>design</i> .
Return Results up to Date	Search for items that were created on <i>or</i> before a specific date.



Search Filters	Description
Search by ID (Max 1 Result)	Search for an item with a specific Item ID. You must enter the whole ID.
Set Search Start Point (ID)	Search for items from a specific location. Enter the specific content item ID where you want to start the search.
Sort by Field	Sorts the items based on the text in the field specified after the colon. For example, to sort the search results by item name you enter <i>sort:_name</i> . Click the sorting icon to revert the sorting.
Search by Tag	Search for items that have a specific tag.
Search by Raw Text	Search for items that contain a specific word.

3. The filter is then inserted into the **Search** field followed by a colon. After the colon, enter the search keyword for the filter. Sitecore auto-suggests the text or prompts you to enter a date. You must enter 1-3 characters before Sitecore makes any suggestions.

Save Vrite	icon ~ I Editors II Contextual Tab Icon ~ I Editors II Contextual Tab Help A Tree Node Style B Context Menu Appearance	Buckets Revert Sync Cone Undone Insert Options Template Attributes	
Searc	ch 🔍	Search Content C	
	a i stecore a di Content a di Content a di Home B di di standard-Items	🔻 📦 template:	× < < ≡ ::: @
	Services		
8			
	Contact-Us		

4. Press ENTER or click the **Search** button  $\square$ .

#### Note

Once you get familiar with the syntax for the different searches, you can type the search filter directly into the **Search** field, for example *author:*, *template:*, or *start:*. Sitecore still auto-suggests the text or prompts you to enter a date.

## 7.7.1 Combining Multiple Search Filters

You can combine multiple search filters to limit the search results even further and you can enter as many search filters as you need.

When you enter more than one search filter the search uses *or* logic by default. This means that the search returns items based on either the first filter *or* items based on one or more of the remaining search filters.

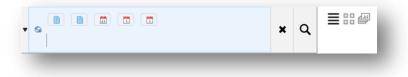


For example, in the following screenshot, a filter for version 2 and a filter for the Japanese language are inserted in the search query.

	v version: 2 × (> language: japanese_japan × ) × Q	
	Your search has returned <b>2</b> results in <b>00.0122</b> seconds under the <b>News</b> item	Author sitecoreadmin (2)
	Office-Core-in-Top-5 Template: News Article Location: News Version: 2 Created: 2013-03-06 By: sitecore\admin Lock for Editing Add Version Preview Translate(ja-JP) Translate(de-DE) Translate(da) en	Template news article (2)
	Jansson-Chooses-Office-Core Template: News Article Location: News (2) Version: 1 Created: 2013-03-07 By: sitecore\admin	Language english (1) japanese_japan (1)
*	🖪 Lock for Editing 📑 Add Version 📑 Preview 📑 Translate(de-DE) 📑 Translate(da) 블 en 🛛 ja-JP	Date Range

This returns two items — one item that has a version 2 and one item in Japanese. Neither of the search results matches both search filters.

If the query gets too big, the filters collapse but it still gives you with an overview of the search filters.

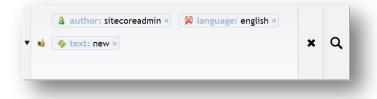


## Combining And and Not in a Search Query

To Perform complex searches for items that, for example, must contain or must exclude specific words, you must use *and*, *or*, and *not* to combine the search filters in the query.

When you enter a filter in the search field, you can click the icon for the search filter and toggle between *must* contain and *must not* contain.

- If you select  $\P$ , the items that the search returns *must* contain the value in the search filter.
- If you choose , the items that the search returns *must not* contain the filter value.
- If you choose to add neither s or to a search filter in a query with filters that are marked with either or the search filter with no marking determines which items are listed at the top of the search results.



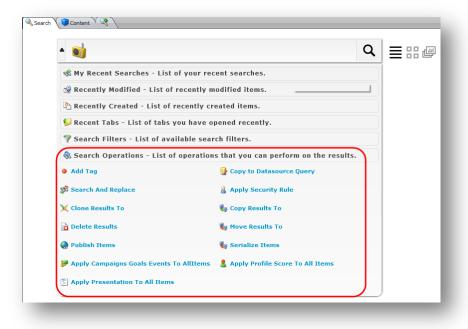
In the previous example, the search results *must* have the text *new* in the content, the results *cannot* be in the English language, and the items written by the sitecoreadmin user are listed at the top of the search results.



# 7.8 Performing Operations on Search Results

Search operations is a powerful feature that lets you run any operation on the search results. When you click **Search Operations**, a drop-down menu appears with several operations that you can perform on the results of the current search query.

The operations listed in this screenshot are the default search operations in Sitecore, but your administrator can create and add customized search operations.



To apply search operation to the search results:

- 1. After you have generated a list of search results, click the drop-down arrow to the left of the **Search** field.
- 2. Expand **Search Operations** and select the operation that you want to apply to the search results.

Depending on your access right, only some of the following operations are available. For a user with full access rights, the following search operations are available:

Search Operation	Description
Add Tag	Tag all the items in the search results with the same tag. To add tags to the items in the search result, click <b>Add Tag</b> and the <b>Item browser</b> dialog box opens. Find the tag you want to add to items in the search result, either from the <b>Items</b> option, where you can navigate to the tag in the content tree or from the <b>Search</b> option, where you can use the search interface to find the tag.



Search Operation	Description
Search And Replace	Replace a specific word in all the search result items with another word. When you click <b>Search and Replace</b> a dialog box appears. Enter the word you would like to replace, then enter a pipe ' ' followed by the word you want to insert instead. For example to replace the words 'Office Core' with 'Sitecore', enter: <i>Office Core Sitecore</i> in the text field.
	<b>Note</b> The search and replace functionality is case-sensitive. If you need to replace multiple words like 'Office Core', they are not replaced when they are joined by for example a hyphen — Office-Core.
Clone Results To	Clone all the items in the search results to a specific location in the content tree. When you click <b>Clone Results To</b> , the <b>Clone Item</b> dialog box opens. Here you specify the location for the new clones. You can either browse to the location through the content tree on the <b>Browse</b> tab or click the <b>Search</b> tab to search for the location.
Delete Results	Delete the items that appear in the search result. When you click <b>Delete Results</b> , the items are instantly deleted from Sitecore and a message appears telling you that the items have been deleted.
	Warning You are not presented with a warning or asked to confirm your choice before the items are deleted. Once you click <b>Delete Results</b> , all the search results are deleted from Sitecore completely and you are <i>not</i> able to restore them from the <b>Recycle Bin</b> .
Publish Items	Publish all the items in the search result at the same time. When the publishing job is finished, a message appears telling you that the items have been published.
Apply Campaigns Goals Events to All Items	Apply campaigns, events, or failure actions to the items in the search result. When you click <b>Apply Campaigns Goals Events To</b> the <b>Attributes</b> window opens from where you can specify the campaigns, events, failure actions, and settings for all the items in the search result. For more information about Sitecore campaigns, see the manual <i>Marketing Operations Cookbook.</i>
Apply Presentation To All Items	When you click <b>Apply Presentation To All Items</b> the <b>Layout Details</b> window opens. From here you can assign the same layout, controls, and placeholders to all the items in the search result.
Copy to Datasource Query	Create a text string that you can then paste into a "data source" field, so that the data source returns the items that match this search result. This operation is only relevant for developers and administrators.
Apply Security Rule	This operation should only be performed by security administrators. It allows them to change the security settings for the content items listed in the search results. When you click <b>Apply Security Rules</b> the Security Settings windows opens from where you can assign access rights to all the items in the search result for either a specific user or a specific role.
Copy Results To	Copy all the items in the search result to another folder. When you click <b>Copy Results To</b> , the <b>Copy Item To</b> dialog box opens, from where you can browse to or search for the folder that you want to copy the items to.



Search Operation	Description
Move Results To	Move all the items in the search result to another folder. When you click <b>Move Results To</b> , the <b>Move Item To</b> dialog box opens, from where you can browse to or search for the folder that you want to move the items to.
Serialize Items	Serialize all the items in the search results to files in the standard serialized files folder. When serializing an item, it is converted into a format that can be written into a file and imported again later into this or another Sitecore installation. When the operation is finished, a message appears telling you that the items have been serialized.
Apply Profile Score To All Items	Assign a profile card or a custom profile score to the items listed in the search result. When you click <b>Apply Profile Score To All Items</b> the <b>Profile cards</b> window opens from where you can select a profile card or set a customized profile score for the items in the search result.



## 7.9 Saved Searches

If you have a search query that you run regularly from the same item bucket, you might consider creating a saved search. A saved search allows you to save and run a specific search query within an item bucket without having to enter the filters every time.

#### Note

Although content authors do have the necessary access rights to set up saved searches that are unique to themselves, we recommend that an administrator sets up the saved searches. The administrator can choose whether the saved searches should be unique to each user or not.

To create a saved search:

- 1. In the content tree, navigate to the item bucket that you want to search in.
- 2. On the Home tab, in the Insert group, click Saved Search.
- 3. Give the saved search a suitable name and it is added to the content tree as a sub item of the item bucket.
- 4. Select the saved search item and on the **Content** tab scroll down to the **Item Buckets** section.

te Appearance	B. Context Menu Budet Revet Sync Cone Undone BarReset Cones Insert Options Template Attributes	
ch 🔍	Search Content & Search 12:04:51 ×	
<ul> <li>∃ itecore</li> <li>□ 4 Content</li> <li>□ 5 Home</li> <li>□ 9 Standard-Items</li> </ul>	My Saved Search     Multicketable Item stored in an Item Bucket	<u> </u>
About-Us	This item is stored in an item bucket. However, it is not hidden because its template is not bucketable. If you want to hide this item in an item bucket, you must make the template Quick Info	that is based on bucketable.
🗉 🞯 Services	Advanced	
Case-Studies	Appearance	
News W Naved Search	2 Help	
Contact-Us		
RSS-Feeds	insert Options	
🗉 🥥 Settings	a inset options	
🗉 🛅 Layout		
🗷 🚘 Media Library 🗷 😼 System	Bucket Parent Reference - Reserved for system use. Do not set manually [shared]:	<b>~</b>
	Bucketable - Can be stored as an unstructured item in an item bucket [plared]:  Lock child Relationship - Maintains the hierarchical relationship between this item and its children when this item is stored in an item bucket [plared]:  Buld Query - Paste Query - Caer Default Bucket Query [plared, standard value]:	
	text:" Build Query - Paste Query - Oear Persistent Bucket filter j/hared]: Ilocation: (A2F74500-C57-417A-B4BA-36DA1479EBE6)&-template: (98EC378F-BCA6-40C6-A772-5C52190EF205)	
	Select all + Deselect all	
	Enabled Views [shared]: All Selected	

#### You can build:

- A **Default bucket query** a query that appears in the search field every time you open the search tab, and you have the option to delete it from the search box if necessary. The default query is 'text:\*', which brings back everything.
- A Persistent bucket filter a query that appears in the search field every time you open it, but you *cannot* delete it from the search field. The default query consists of the 'location:{*ID of the parent item*}' which states the location from where the search should be run and the '-template:{*ID of the saved search template*}' which states that items based on the saved search template should *not* be displayed.

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5. Click the **Build Query** button to build the query from the search interface and click **OK**.

As an example, the search query in the screenshot below consists of the persistent bucket filters for location and template, but you can enter as many filters as you need.

	•	_	BCA6-40C6-A772-5C5219 CF57-417A-B4BA-36DA14	_	۹	∎∷₽		E
		Your search	has returned 13 results in 00.0433 :	seconds under the <b>current ite</b>	<b>m</b> item		Author sitecoreadmin (12) sitecoreaudrey (1)	
1	Redesign-of-NY-Offices         Template: News Article Location: News         Version: 1 Created: 2009-06-15 By: allocore ladmin         B Lock for Editing       Add Version         Preview       Translate(ja-JP)         Translate(de-DE)       Translate(da)			a) 🔚 en	Template news article (12) news section (1)			
	Version: 1 Create	Article Location: News d: 2009-06-15 By: sitecore	admin B Preview 📑 Translate(ja-JP)	📑 Translate(de-DE) 📑 Tr	ranslate(da	ā) 📕 en	Language chinese_simplifi (1) english (12)	

- 6. To remove any queries from the **Default Bucket Query** or the **Persistent Bucket Filter** fields, click the **Clear** button.
- 7. Click Save in the Content Editor ribbon to save your changes.

## 7.9.1 Run a Saved Search

Once you have saved a search, you can run it by clicking it in the content tree.

To run a saved search:

- 1. In the content tree, navigate to the saved search.
- 2. Click the saved search and it opens on the **Search** tab with the result of the pre-defined search criteria.

🔀 🔮 {AE/F45D0-	CF57-417A-B4BA-36DA1479	505(3		
Your search ha	s returned 13 results in 00.0488 seconds	under the My Saved Sea	rch item	Author sitecoreadmin (1)
Redesign-of-NY-Offices Template: News Article Locatio	n: News			Template
Version: 1 Created: 2009-06-15 B	<b>y:</b> sitecore\admin /ersion 📋 Preview 📑 Translate(ja·	JP) 📑 Translate(de-D	E)	saved search (1)
📕 Translate(da) 📲 en				Language
NY-Office-Redesign-Complete Template: News Article Locatio	n: News			english (1)
Version: 1 Created: 2009-06-15 B		10) <b>.</b>	- >	Date Range
🔄 Lock for Editing 🔮 Add v 📑 Translate(da) 📑 en	/ersion 🔋 Preview 📑 Translate(ja-	JP) 📕 Franslate(de-D	=)	thismonth (1)
				thisweek (1)
Modern-Design-Co-Award Template: News Article Locatio	n: News			thisyear (1) today (1)



The search field in the previous screenshot contains the following pre-defined search filters as described in section 7.9:

- The first filter returns everything from the item bucket. Because the filter is part of the default bucket query you can click the X and remove the filter from the query.
- The icon in the second filter tells the search *not* to bring back any items based on the specific template ID. Furthermore, you cannot remove the filter from the query because it is part of the persistent bucket filter.
- The third filter specifies the location ID from where the search should begin. This filter is also part of the persistent bucket query, which is why you are not able to remove it from the search query.



# **Chapter 8**

# The Media Library

This chapter describes the Sitecore Media Library and the functionality that it includes. It describes how you can use the Media Library to upload and edit different types of media items such as images, audio, and video. It also covers other more advanced options such as versioning.

This chapter contains the following sections:

- Overview
- The Media Library User Interface
- Uploading Media Files
- Editing Media Items
- Media Items and Versioning
- Media Library and Searching



## 8.1 Overview

You use the Media Library to store all the media files that you want to use on your website. You can embed media files, such as images, in a web page or make them available for download by visitors to your website.

The Media Library can contain:

- Images .jpg, .gif, .png and other formats.
- Word documents . doc and . docx files.
- PDF documents
- Videos . MPEG, . WMV and other formats.
- Audio files . MP3 and other audio formats.

Sitecore has an Image Editor that you can use to edit images.

The Media Library allows you to:

- Keep all your media files in one place and organize them in a folder structure similar to the content tree.
- Navigate the content tree or use Sitecore's search functionality to quickly find media items. For more information on Sitecore's search functionality, see the section *Searching in Sitecore*.
- Upload media files to the Media Library. You can use the upload buttons to browse your computer for images or simple use the drag and drop dialog box to add media files.
- Make every media content item and media file versionable. For more information about media items and versioning, see the section *Media Items and Versioning*.

## 8.1.1 Opening the Media Library

There are a number of ways to open the Media Library:

## **Content Editor**

- 1. Log in to the Sitecore Desktop.
- 2. Click the **Sitecore** menu, and then click **Content Editor**.
- 3. In the **Content Editor** content tree, click the **Media Library** node.

Alternatively, in the bar at the bottom of the **Content Editor**, click **Media Library**.

Content Editor	Media Library Wor box
sitecore	

### **Sitecore Menu**

- 1. Log in to Sitecore as admin and select **Desktop**.
- 2. Click the Sitecore menu, and then click Media Library.



# 8.2 The Media Library User Interface

The Media Library opens by default on the **Search** tab, with a search already run for all items in the Media Library.

Edit Insert	2 of 3     Depicter     De		
Media Lbray     Gries     Grie		K Q	u U
	Media Library Template: Main section Location: sitecore Version: I Created: 2004-91:2 By sitecore Jadmin Language: en Inscrit Hedia Tolder I sitecore Upload File I en el ja-JP de-DE 1 da	(4)	Language danish (30) english (165) german_germany (23)
	부분가 5-1751) Template: // / 선생 2/ Location: sitecore Version: 5 Created: 201-90-97 Byr sitecore/admin Language: ja-39 및 Tasert Hedia Folder 및 Insert Upload File 및 en @ ja-3P 및 de-DE 및 da	(4)	japanese_japan (85) Template
Int Editor Media Library Workbox	Hedien-Bibliothek           Template: Hauptbereich Location: sitecore           Version: 1 Created: 2013-09-07 By: sitecore/admin Language: de-DE	(4)	image (127) jpeg (136) main section (4)

The Media Library Folder tab consists of the following elements:

Ribbon Home Navigate Bare Part Edt Support	er (1 of 3) 🚔 📑 🎯 Copy To 🔀 😭 🤣 Cut 💷 R	ew My Toobar tename Kaplay Name Sorting
Box Box Content Tree (folder	Options Upload Files Upload Files (Advanced) Media	Options displays media item upload options: - Simple - Advanced - Drag & Drop
succure)	Files         Images           2 items         15 items           System         3 items	Media displays all media folders for a selected node
Content Editor Media Library	Workbox	

## The Ribbon

In the Media Library, you get the same set of options in the ribbon as you do in the Content Editor, although the **Insert** group allows you to create new media folders and upload media files.

If you select a media item in the content tree, the **Media** tab is displayed, which gives you two further groups of actions:

• Write — Save changes



• Media — View, Edit, Download, Drag & Drop

#### Note

The functionality in the ribbon depends on the user rights you have been assigned by the website administrator.

### The Content Tree

Use the content tree or the search box to find media items. Expand nodes in the content tree to see all sub-folders and close nodes to hide sub-folders.

You can view the Media Library content tree from the Content Editor or the Media Library.

#### Search

When you open the Media Library it opens by default on the **Search** tab with an already run search for all items in the Media Library. The **Search** tab offers an elaborate search functionality that can help you find very specific items among maybe thousands of items in the Media Library.

For more information about the Sitecore search functionality, see the section Searching in Sitecore.

#### Folders

The Folder tab displays the options and media contents for a selected folder in the Media Library.

You should store all your media items in folders and give folders meaningful names.

An easy way to organize your Media Library folder structure is to mirror the structure of your website. For example, if your site has four main sections; *Home, Products, Jobs* and *Contact Us* you could create four folders with the same names to store all your images and other media. This will make it easier to locate media items as your site grows and you need to update media items.

## 8.2.1 Creating New Folders in the Media Library

You can create new folders in the Media Library content tree and you can add further sub-folders if you wish to keep your folder structure as simple and uncluttered as possible.

To create a new folder:

- 1. Select the Media Library item in the content tree or another item under which you would like to create a sub-item.
- 2. On the Folder tab in the Options pane, click New Folder.
- 3. Give the new folder a name and click **OK**.
- 4. Select the new folder and you can see the **Options** section displayed in the **Folder** tab. The new folder has the same upload options as the other Media Library folders.

Now you can start uploading media items to the new folder.



# 8.3 Uploading Media Files

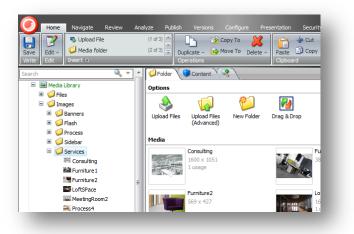
In the Media Library, there are three different ways to upload media files:

- Upload Files
- Upload Files (Advanced)
- Drag & Drop

## 8.3.1 Upload Files

Use the Upload Files button to add single or multiple files to the Media Library. To upload a single media file:

- 1. In the **Media Library**, in the content tree, select a destination folder.
- 2. In the right-hand pane, in the **Options** section, click **Upload Files**.



3. In the **Select Files to Upload** dialog box, browse to an image folder on your computer, and select the file that you want to upload.



4. Click **Open**.



During the upload process the following information is displayed:

Home Navigate Review Anal	yze Publish Versions Configure Presentation Security View My To (1 of 3) (2 of 3) Duplicate ~ Operations Copy To Delete ~ Paste Copy To Delete ~ Copy Copy Copy To Delete ~ Copy Copy Copy To Delete ~ Copy Copy Copy Copy Copy Copy Copy Copy
Search Media Library B Media Library B Fes G Independent B Manaers B Manaers B Manaers	Image: Solid Fields     Image: Solid Fields       Upload Fiels     Upload Fiels       Upload Fiels     New Folder       Drop
Process     Sidebar     Sidebar     Services     Consulting     Purniture1     Furniture2     Koala     LoftSPace     MeetingRoom2	P     Uploading       Filename     Size       Alternate Text       Penguins.jpg       10ghthouse.jpg       561 KB       11ulps.jpg       621 KB
Process4	*

5. When the upload is complete, the image is displayed in the destination folder in the **Media** Library.

## 8.3.2 Upload Files (Advanced)

Use the Upload (Advanced) button to upload single or multiple media files to the Media Library. With the advanced upload option, you have a range of upload options available. For example you can choose to overwrite duplicates or make the uploaded media files versionable.

To upload multiple files:

- 1. In the Media Library, in the content tree, select the destination folder.
- 2. In the right-hand pane, in the Options section, click Upload Files (Advanced).

Look in:	Sample Pictures		• G 🕫	₽
Recent Places		-	A State	(FAR)
Desktop	Chrysanthemum	Desert	Hydrangeas	Jellyfish
Computer	Rep		FR	
Network	Koala	Lighthouse	Penguins	Tulips
	File name:			• Open
	Files of type: All	Files (*.*)		▼ Cancel

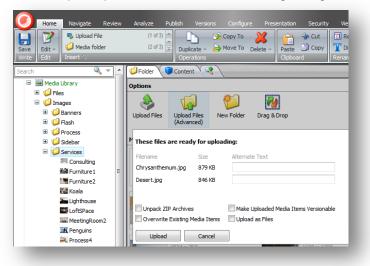
3. In the **Select Files to Upload** dialog box, browse to the folder on your computer that contains the images you want to upload.

To select multiple files, press the CTRL key while you select the files.

4. Click **Open**.



5. Before the upload process can start, the following dialog box is displayed:



This dialog box contains the following information and additional upload options:

Field	Description
Filename	Displays a list of the files to upload — file name and extension, such as, jpeg, gif, or png.
Size	Displays the size of each file in kilobytes.
Alternate Text	Enter an alternative description here if you are uploading an image.
Unpack Zip Archives	Select this option if you upload a Zip archive and want to unpack the files in the Media Library.
Overwrite Existing Media Items	Select this option if you upload a file with the same name as a file that already exists in the Media Library, and want to overwrite the existing file. If you don't select this option, a duplicate file is created in the Media Library.
Make Uploaded Media Items Versionable	Select this option if you want to make the file you are uploading versionable. If you don't select this option, versioning remains switched off.
Upload as Files	Select this option to store the file in the file system rather than in the database.

#### 6. Click Upload.

The uploaded images are displayed in the destination folder in the Media Library.

## To Upload Multiple Files in a Batch

1. Create a .zip archive on your local computer with the files you want to upload. You can include sub-folders with files.

The folder structure is recreated in the Media Library after the files are extracted.

- 2. In the Media Library, select the folder that you want to upload the files to.
- 3. In the right-hand pane, click the Folder tab and then click Upload Files (Advanced).
- 4. In the Select Files to Upload dialog box, browse to the .zip archive.



- 5. Click Open.
- 6. Select the **Unpack ZIP archives** checkbox.

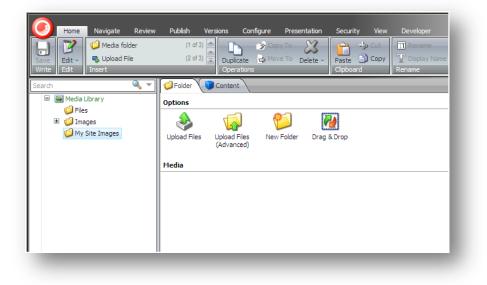
Upload Files	Upload Files (Advanced)	New Folder Dra	ag & Drop	
1edia		These files are read	ly for uploa	ding:
1 A	diver 132 x 200 1 warning	Filename Sitecore Images.zip	Size 584 KB	Alternate Text
		Unpack ZIP Archive		Make Uploaded Media Items Versionable
		Upload	Cancel	

7. Click Upload.

The archive is uploaded and extracted to the Media Library folder you selected.

## 8.3.3 Uploading Files with Drag and Drop

You can also use drag and drop to upload files to the Media Library. Drag and drop is the quickest and easiest way to upload media files to the Media Library. You can upload single or multiple files from your computer to the **Drag and Drop** dialog box.



To drag and drop files to the Media Library:

1. In a **Media Library**, select the folder that you want to upload the files to.



2. In the Folder tab, click Drag & Drop to open the Drag and Drop dialog box.

To add files, drag and drop them int this window. For additional options,		computer, drag them	from
lame	Date modified	Туре	1
GianlucaFashions1	20-04-2011 15:01	JPEG image	
GianlucaFashions2	18-04-2011 19:42	JPEG image	
GreenGarden2	18-04-2011 14:32	JPEG image	
🔄 GreenGarden3	20-04-2011 15:04	JPEG image	
🔄 GreenGarden4	20-04-2011 15:03	JPEG image	
GreenGarden5	20-04-2011 15:05	JPEG image	
GreenGardens1	20-04-2011 15:05	JPEG image	
MorganPriceTrotter1	20-04-2011 15:06	JPEG image	
MorganPriceTrotter2	20-04-2011 15:06	JPEG image	
RepublicPlush1	20-04-2011 15:07	JPEG image	
RepublicPlush3	20-04-2011 15:08	JPEG image	
RepublicPlush5	20-04-2011 15:07	JPEG image	
RepublicPlush7	20-04-2011 15:08	JPEG image	
			Þ

- 3. Open Windows Explorer.
- 4. In **Windows Explorer**, navigate to the folder where the images are stored and select the images you want to upload.

Look in:	Sample Pictures		- G 🕫 I	"
Recent Places				Contra Contra
Desktop	ACTING ST	24.405		
Libraries	Chrysanthemum	Desert	Hydrangeas	Jellyfish
Computer	37 8	The second		a Walter
	CA SEA	All all		A Carlo Carlo
Network	Koala	Lighthouse	Penguins	Tulips
	File name:			Open
	Files of type:	Files (*.*)		Cancel



5. Position the **Windows Explorer** window next to the **Drag and Drop** dialog box and drag the selected images from **Windows Explorer** to the **Drag and Drop** dialog box.

Name ^	Date modified	Туре
🕌 About	01-02-2010 11:17	File folder
🍌 Banners	14-04-2011 14:26	File folder
🐌 Brochures	01-02-2010 11:16	File folder
📙 Clients	14-04-2011 15:29	File folder
🍌 Flash	04-06-2009 09:29	File folder
퉲 Inspiration	01-02-2010 11:16	File folder
🍌 Logos	01-02-2010 11:16	File folder
News .	09-04-2011 13:18	File folder
🐌 Partners	01-02-2010 11:16	File folder
Process	01-02-2010 11:16	File folder
🐌 Register Form	01-02-2010 11:16	File folder
Services	01-02-2010 11:16	File folder
🖟 Sidebar	08-04-2011 16:29	File folder
Teasers	01-02-2010 11:17	File folder
Toolbox	01-02-2010 11:16	File folder
+ Copy te	o Toolbox	

#### Note

You have additional options to manage your media items in the Drag & Drop dialog box by right-clicking an item. However, it is recommended to primarily manage and organize the media items from the Media Library.

- 6. When you have dragged and dropped the files, click **Done** and they are copied to the **Media** Library.
- 7. If the folder you copy to already contains the same media items, the **Copy File** dialog box opens, asking you to decide how to handle the duplicate media items.

Copy File	×
There is alre Click the file yo	eady a file with the same name in this location. u want to keep
Copy an Replace the	d Replace e file in the destination folder with the file you are copying:
	Chrysanthemum.jpg Chrysanthemum (C:\Users\Public\Public Pictures\Sample Pictures) Size: 858 KB Date modified: 14-07-2009 07:32
Don't co No files will	PY I be changed. Leave this file in the destination folder:
	Chrysanthemum.jpg Chrysanthemum (\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\
	ıt keep both files u are copying will be renamed "Chrysanthemum (3).jpg"
Do this for a	Il conflicts Skip Cancel



8. In the **Media Library**, **Media** section, you can now see the images that you uploaded and that each item contains a warning.



9. Open the media item for each image and enter some text in the **Alt** field. This removes the warning from each item.

#### Note

Drag and drop functionality is currently only supported in Internet Explorer 7 or later. If you use a different browser such as Mozilla Firefox, you can only use the Upload Files and Upload Files (Advanced) options to upload files to the Media Library.



# 8.4 Editing Media Items

In the Media Library, you can edit media items such as images, documents and videos either using Sitecore tools such as the Image Editor for images or with other applications that you have installed on your computer such as Microsoft Word for documents or Photoshop for images.

## 8.4.1 Media Files and Media Items

Before we start to edit a media item, it is important to understand the difference between media files and media items. An image stored in *My Pictures* on your computer is called a media file. If you upload an image file from here to the Sitecore Media Library, it is attached to a media item and from then on is referred to as a media item.

In Sitecore, a media item is just another content item that is composed of several fields and always has a file attached to the **Media** field. To view a media item, click one of the images you uploaded earlier.

A Sitecore media item:



## 8.4.2 The Image Editor

To open an image for editing in the Image Editor:

- 1. Click the Sitecore menu.
- 2. Click All Applications and then click Image Editor.
- 3. In the **Image Editor** window, click **Open** to open the **Media Browser** window and select an image.



## The Media Browser

In the **Media Browser** window, you can view all the media items in the Media Library. You can expand or contract nodes in the Media Library content tree to find the media item you want to edit.

You can access the Media Browser from the Content Editor. In a content item, in an **Image** field, click **Browse** to open the **Media Browser** window.

earch Browse				
<b>₫</b> 3d66	58d8a0bf4e75b3e2d050fabcf4e1 ×	×	۹ ≣ ⊞ 🔒	
	Template Thumbnails Template: Media folder Location: System Version : Created: 2012-10-01700:00:00 By: sitecore\admin 을 해보 텔 en		Author defaultanonymous (10) sitecoreadmin (88) sitecoreanonymou (6)	
(()))	audio Template: Image Location: Template Thumbnails Version: 1 Created: 2012-10-01700:00:00 By: sitecore\anonymous ■ IRR ■ cn de-DE	(2)	Language danish (20) english (37) german_germany (25) japanese_japan (22)	
	audio	(2)	Template	-

## 8.4.3 Editing Options

You can also edit media items locally on your computer. For example, you may prefer to use another application to edit images and then upload them again to the Media Library.

When you click on a media item, the **Edit** icon in the **Media** group changes depending on the type of file you want to edit. For example, if you click a Word document, you see a pencil as the associated icon.



If you click on an image, you see an artist's palette.





If you select an image item and then click the top half of the Edit command, you open the image in the **Sitecore Image Editor** by default.



You can change the default setting and use a different image editing program.

To change you default image editor:

1. In the Media Library, click the Sitecore button 🥑 and then click Application Options.



- 2. In the Application Options dialog box, click the Media tab.
- 3. In the **Media Edit Button Default** section, select the **Open editing application installed on user's computer** check box.
- 4. Click **OK** to save your changes.

In the Media group, click the Edit arrow and a drop-down list appears.



- Edit in Image Editor
- Edit in Local Editor

These options allow you to override the default setting and select which editor you prefer to use.



## 8.4.4 Using Drag and Drop to Edit Media Items

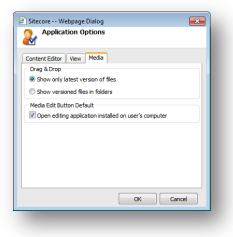
You can also use the Drag & Drop dialog box to select a file and edit it.

However, there are some application options that control how files are displayed and how editing works in the **Drag & Drop** dialog box.

#### The Drag & Drop Application Options

To set the Drag & Drop application options:

1. In the Media Library, click the Sitecore menu, and then click Application Options.



- 2. In the Application Options dialog box, click the Media tab.
- 3. In the **Drag & Drop** section, you can specify the display settings for the **Drag and Drop** dialog box.

There are two options:

• Show only latest version of files

If you select this option:

The Drag & Drop dialog box only displays the latest version of each media file.

When you open the **Drag and Drop** dialog box and delete the latest version of a media file from there, every version of the file is deleted.

When you open the **Drag & Drop** dialog box and edit a media file from there, a new version of the file is automatically created when you save your changes.

#### • Show versioned files in folders

If you select this option:

The **Drag and Drop** dialog box displays every version of the file in a folder. Different folders are created for each language that your website uses.

When you open the **Drag and Drop** dialog box and delete a version of a media file, Sitecore only deletes that version of the file.

When you open the **Drag and Drop** dialog box and edit a media item, you must click **Save As** to create a new version of the item.

4. In the **Media Edit Button Default** section, you specify which applications should be used to edit media files.

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If you select the **Open editing application installed on user's computer** check box, Sitecore uses the local image editing application that is associated with the different image file extensions on your computer. This is the default setting.

If you clear this check box, the Sitecore Image Editor is used.

For more information about Drag and Drop and versioning, see the section, *Making Drag and Drop Files Versionable*.

## Editing Files from Drag & Drop Window

You can also edit media items from the **Drag & Drop** dialog box.

- 1. Select a media folder and then open the **Drag & Drop** dialog box.
- 2. In the **Drag & Drop** dialog box, select the image you want to edit.
- 3. Right-click the image, click **Open With** and then select an image editing application from the menu displayed.
- 4. The image opens in the image editing program.
- 5. Edit the image and save your changes in the editing application.

If you click Save, the original image file is overwritten.

If you click **Save As**, you create a new image in the **Drag & Drop** dialog box. You do not have to upload the file again. All the changes you make to the image are saved in the **Drag & Drop** dialog box.

6. In the **Drag & Drop** dialog box, click **Done**.



## 8.5 Media Items and Versioning

In Sitecore, a website consists of multiple content items. Each content item is made up of fields which contain content such as text or images. The Media Library contains media items. Media items are just another kind of content item. However, media items have an additional field called *Media* which has an attached media file.

You can create multiple versions of any content item or media item. There are two types of versions you can create:

#### • Numbered versions

For example, you could create a second version of your products page that is to be used during a special promotion for a limited period. You could crop an image especially for this promotion and then revert back to the original image afterwards.

#### • Language versions

For example, you could create a page in Danish and then create a second version in English. You would therefore want an image to display Alt text in both languages.

As stated earlier, versioning can be applied to content items and media items in the same way. However, media files that you upload to the Media Library can also be made versionable.

#### Note

There is no limit to the number of versions you can create in Sitecore.

## 8.5.1 Versioned Media Items and Versioned Media Files

In Sitecore, there is an important difference between versioning media items and versioning media files. The following scenarios explain the difference:

#### Scenario 1

You have a media item called *diver*. In the Content Editor, you click the **Versions** tab and make a second version of this item.

The image file attached to the **Media** field (diver.jpg) in this item is **not** versionable by default.

You want to create a second version of this item with different Alt text for your company's spring promotion. The attached media file, diver.jpg is not versionable, so it remains unchanged when you create the new version. Only the information contained in item fields can be changed. Regardless of how many versions of this item you create, the attached media file (diver.jpg) remains unchanged.

#### Scenario 2

You have a media item called diver.jpg. In this scenario, before you upload the file to the Media Library, you decide to make it versionable. To do this, in the **Upload Files (Advanced)** dialog box,



#### select the Make Uploaded Media Items Versionable check box.

hese file	s are rea	dy for uploadi	ng:		
		Alternate Te:	xt	_	
liver.jpg	3 KB				_
					- 8
Unpack 2	ZIP Archive	es [	Make Uploaded Media	Items Versionab	/e
Overwrit	te Existing	Media Items	Upload as Files		- 8
		0.1	1		- 8
Uploa		Cancel			

Now when you create a second version of the item you can also keep any changes you make to the media file. For example, if you crop or edit the image you can create a second version each time you make a change to the file.

Note

When you upload new media files to the Media Library, they are unversioned by default.

## 8.5.2 Creating a Second Numbered Version of a Media Item

To make a second numbered version of a media item:

- 1. In the Media Library content tree, select a media item.
- 2. Click the Versions tab and in the Versions group, click Add, to add a new version.

In the top right of the *diver* media item, you can now see a number 2. This is the number of the new version of the item that you created.





To switch between versions:

1. Click the drop-down menu next to the version number and all versions of the selected item are displayed.

2. Modifie		/		2*
	ed 4/6/2009 11:43 A	API by sitecore (a	amin.	
1. Modifie	ed 4/6/2009 11:41 A	AM by sitecore\a	dmin.	
770-				
👸 Add Vers	ion			

2. Click the version number you want to view.

Both numbered and language versions are displayed here.

You can also click the Versions command in the Versions group to view different versions.

## 8.5.3 Working with Versionable Media Files

Media files that you upload to the Media Library are not versionable by default. However, media files can be made versionable after you have uploaded them to the Media Library.

Why make media files versionable? When you edit an image, you may want the option to revert back to an older version of the image.

There are two ways you can make a media file versionable:

- Drag & Drop
- Upload Files (Advanced)

#### Making Drag and Drop Files Versionable

To make all the media files that you upload to the Drop & Drag dialog box versionable:

- 1. Open the Media Library.
- 2. Click the **Sitecore** button and then click **Application Options**.
- 3. In the **Application Options** dialog box click the **Drag & Drop** tab and select the **Show only latest version of files** option.

You must also change a configuration setting in the web.config file.

- The web.config file is stored in the web root folder of your website: C:\Inetpub\wwwroot\YourSitecoreWebsite\Website
- 2. Right-click the web.config file, click Open With, and then click Notepad.
- 3. Locate the following setting:

<setting name="Media.UploadAsVersionableByDefault" value="false" />

To make every media file that you upload with the Drag & Drop functionality versionable, set this value to *true*. The default setting is *false*.

4. Save your changes and close the web.config file.



Changing this setting in the web.config file makes every file that you upload to the Drag & Drop dialog box versionable.

The way the **Drag & Drop** dialog box functions and displays media files is determined by the application options you select in the **Application Options** dialog box.

For information about the Drag & Drop application options, see the section *The Drag & Drop Application Options*.

#### Using Upload Files (Advanced) to Make Items Versionable

1. In the Upload Files (Advanced) dialog box, select the Make Uploaded Media Files Versionable check box.



#### 2. Click Upload.

This makes the files you are currently uploading versionable. You must select this check box every time you upload some files to the Media Library.



## 8.6 Media Library and Searching

In the Media Library, you can use the Sitecore search engine to search through the Media Library. Furthermore it can be set up to be able to search for specific words within the uploaded files. Whether it is a PDF file, DOCX or DOC file, Sitecore can automatically index all the content to make it searchable if you have an appropriate IFilter installed on the machine where the indexing is done. To set this up you need to consult your Sitecore Developer.

#### Note

An IFilter is a plugin that allows the search engine to index various file formats so that they become searchable. Without an appropriate IFilter, contents of a media file cannot be parsed and indexed by the search engine.

When you search in the Media Library, a few more facets, such as *File Size*, *Image Dimensions*, and *File Type*, are available and you can use these to further filter the search results.

Hone Navigste Review Al Media folder Generation of the transformer Berech Construction Generation of the transformer Generation of the transformer Ge	valyze Publish Versions Configure Presentation Security Vew MyToobar (1 d 3) Duckate - Move To Delete - Paste Corp Duckate - Move To Delete - Paste Corp Cobadd Remark Search Polder Content Conte	
		Language english (2) japanese_japan (1) Template jpeg (3) Image Dimensions extra large (3)
		File Type jpeg (3) File Size medium (1) small (2)
tent Editor Media Library Workbox x://sc7130220/sitecore/shell/Applications	/Buckets/ShowResult.aspx?id=%7b3D6658D	<b>E</b> 14:03



# Chapter 9 RSS Feeds

Sitecore supports RSS feeds. This chapter describes how to set up an RSS feed as well as how to subscribe to an RSS feed.

There is also a description of the client RSS feeds that Sitecore users can subscribe to.

This chapter contains the following sections:

- **RSS** Feeds
- Sitecore Client Feeds
- Security and Client RSS Feeds •

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## 9.1 RSS Feeds

An RSS (Really Simple Syndication) is a web feed that is used to publish frequently updated material — such as blogs, news headlines, audio, video, and so on — in a standardized format. An RSS feed can contain either the full text of the material or a summarized version, as well as metadata, such as, publishing dates, and authorship.

RSS feeds allow publishers to syndicate content automatically. Conversely, website visitors can subscribe to these feeds and automatically receive updates from their favorite websites.

Website visitor subscribes to a feed by clicking an **RSS** icon in a browser and this initiates the subscription process. The RSS reader checks the user's subscribed feeds regularly to see if there are any updates and then downloads the updates that it finds, and provides the website visitor with an interface to monitor and read the feeds.

## 9.1.1 Setting Up an RSS Feed

In Sitecore, you *must* use the Content Editor to set up an RSS feed.

You typically create RSS feeds for content items that are updated regularly — such as news items and blogs. In this example, you create an RSS feed for a news item.

Before you can create any RSS feeds, you must create a folder to store your feed items.

To create a folder for feed items:

- 1. In the **Content Editor**, in the content tree, select the **Home** item of the website.
- 2. On the **Home** tab, in the **Insert** group, click the drop-down arrow and select **Insert from Template**.
- 3. Click the Browse tab and navigate to Templates/Common/Folder

🕘 Sitecore Webpage Dialog		х
Insert from Template		
Select a template and enter a	a name for the new item.	
Search Browse		
🖻 🗾 Templates		
🗉 💏 Branches		
🗉 🧾 Common		
🗉 🧔 Office Core		
🗉 🧔 Sample		
🗉 🥥 Starter Kit		
🗉 🔞 System		
🗉 🥥 User Defined		
Template:		
Item Name: New Templates		-
item name: New Templates		
	Insert Cancel	
		_

4. Give the new folder a name — RSS Feeds.

Now that you have created a folder to store the RSS feeds in, you can create an RSS feed.

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To create an RSS feed in the Content Editor:

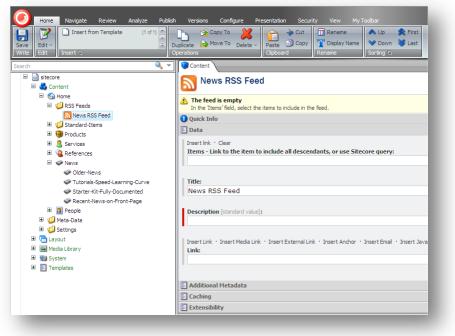
- 1. In the **Content Editor**, select the **RSS Feeds** folder that you just created.
- 2. On the Home tab, in the Insert group, click Insert from Template.

🔁 Sitecore Webpage Dialog	×
Insert from Template	
Select a template and enter a name for the new item.	
Search Browse	
ocardi	
E Templates     Branches	Â
Common	
Gine core     Sample	
🗄 🧔 Starter Kit	-
🖃 🄞 System	=
Alias	
🗉 🍯 Analytics	
🗉 🃁 🎜 Archiving	
🗉 🧔 Branches	
I Growsers	
Child Sorting	
Ú     Dictionary	
🖃 🃢 Feeds	
Feed Rendering Parameters	
S RSS Feed	
<ul> <li>United tor</li> <li>United tor</li> <li>United tor</li> </ul>	
I Item	
Gen	
Item section	
	-
Template: /System/Feeds/RSS Feed	_
Item Name: New RSS Feed	
Insert Cano	e

- 3. In the **Insert from Template** dialog box, navigate to <code>Templates/System/Feeds/</code>, and select *RSS Feed* to create a feed based on this template.
- 4. In the Item Name field, enter a name for the new feed News RSS Feed.



5. Click Insert and the new feed item is created and opened in the Content Editor.



The new feed displays a warning informing you that the feed is empty and that you must select an item to include in the feed.

- 6. In the **Items** field, click **Insert Link**.
- 7. In the **Insert Sitecore Item** dialog box, click **Sitecore**, **Content**, **Home**, and then select the **News** item.

nsert Sitecore Item		Insert item Cance	
Sitecore Items - @ secore - @ cronet - @ Stando Rema - @ AsoArds - @ AsoFeed - @ Series - @ Cronet-Un - @ Cronet-Un - @ Cronet-Un - @ Cronet-Un - @ Cronet-Un - @ Layou - @ Layou - @ Layou - @ System - @ System	Item details	News News Section Isitecore/contentHomeRiews	×

- 8. Click Insert item and the News item is included in the RSS feed.
- 9. On the **Content** tab, in the **Description** field, enter a description of the RSS feed.
- 10. Save the new item.

You have now created the News RSS Feed item.

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Now let's think about what the feed should contain. The feed should *not* tell subscribers that the **News** item has been updated; it should contain information about news articles that are created or updated.

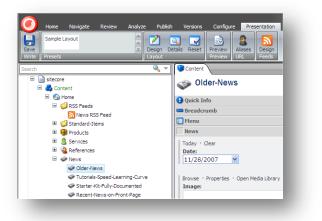
#### Note

You can only create an RSS feed to an item that has subitems. If you create an RSS feed to an item that does not have any subitems, Sitecore tells you that the feed is empty.

The next step is to configure how the news articles are presented in the RSS feed.

To configure how an RSS feed is presented:

- 1. In the Content Editor, expand the News item and select one of its subitems.
- 2. Click the Presentation tab.



3. In the **Presentation** tab, in the **Feeds** group, click **Design**.

	×
RSS Feed Design	
Specify how the item is presented in the RSS feed.	
These settings affect how items based on the 'News Article' template are show	n in the RSS feed.
Title Field:	
Title	•
Body Field:	
Title	-
Date Field:	
Date	•
Preview:	
Jansson Solar Energy chooses Office Core	
01-01-2011 00:00:00	-
Jansson Solar Energy chooses Office Core	
OK	Cancel

4. In the **Feed Presentation** dialog box, specify how the feed is presented to the user who subscribes to this RSS feed.

Field	Value	
Title Field	The item field that you want to appear in the title of the feed.	
Body Field	The item field that you want to appear in the body of the feed.	

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Field	Value
Date Field	The date field that you want to appear in the feed. This could be, for example, the date the item was created, updated, or the date from which the news applies.
Preview	A preview of the feed based on the selections above.

5. When you have filled in these fields, click **OK**.

In the **Feeds** group, you can see that the **Design** button now has a green check mark indicating that an RSS feed has been designed for this item.

6. In the **Content Editor**, save your changes.

#### Important

This item and all the other items based on the same template are presented in the same way in the feed.

If some of the subitems are based on a different template, you must also specify how those items should be presented in the feed.

When you have configured how the feed should be presented, the RSS feed item should no longer display any warnings.

## Identifying the Template that an Item is Based On

As a content author, you probably don't have access to the template in Sitecore. In fact, you may not be aware of the templates that the content items are based on.

But when you set up RSS feeds, it might be helpful to see which template the item is based on. This is because the way the items are presented in the RSS feed depends on the template that they are based on.

To see which template an item is based on:

1. In the **Content Editor**, click the **Sitecore** button **()**, and then click **Application Options**.

Sitecore Webpage Dialog
Application Options
Content Editor View Media
Show/Hide
V Item Title Bar
Field Section Titles
Fields from the Standard Template
Bucket Items
I Hidden Items
V Quick Info Section
Quick Action Bar
Seach Panel
Validator Bar
Use Smart Tags
Prefetch Collapsed Sections
Content Profiling
Field Values
Show Input Controls
Show Raw Values
Pages
Show Pages Bar
OK Cancel

2. In the Application Options dialog box, select the Quick Info Section option and click OK.

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- 3. In the Content Editor, select the item you are interested in.
- 4. The **Content** pane should now display a section called **Quick Info** at the top of the item.
- 5. Expand the **Quick Info** section.

istecore     Gontent	Morgan-Price-Trotter
🗉 🚳 Home	🕒 Quick Info
🗉 🧔 Standard-Items	
🗉 🧟 About-Us	Item ID: {3A870513-A1E2-417E-A05D-4E071228B663}
🗉 🌚 Services	Item Name: Morgan-Price-Trotter
Case-Studies	Item Path: /sitecore/content/Home/Case-Studies/Morgan-Price-Trotter
🙆 Morgan-Price-Trotter	
🙆 Gianluca-Fashions	Template: /sitecore/templates/Starter Kit/Content Templates/Client Description - {978EFD3B-AE58-45C9-9506-77FC3D803596
🙆 Republic-of-Plush	Created From: [unknown]
🙆 Green-Garden	Item Owner: sitecore\admin

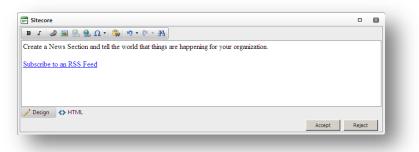
6. The **Template** field tells you which template the item is based on. If you click the link to the template Sitecore opens the template item.

## 9.1.2 Creating a Link to the RSS Feed

After you have defined the RSS feed, you must add a link to the parent content item so that users can subscribe to the feed.

To add a link to the content item:

- 1. In the Content Editor, open the News item.
- 2. Expand the Page Title and Text section and click Show Editor above the Text field.
- 3. In the editor, enter some text for the link.





4. Select this text and click the **Insert Sitecore Link** button **2**.

Internal Link Media Items Search		
😑 📄 sitecore		
🖃 💑 Content		
🖃 🙆 Home		
🎟 🥥 Standard-Items		
🗉 🤹 About-Us		
🗉 🥎 Services		
Case-Studies		
🗉 🐋 News		
III Contact-Us		
🗏 🔝 RSS-Feeds		
S Office-Core-News		
Up Settings		
🗉 🤄 Layout		
🗉 🚘 Media Library		
🖩 📷 System		
I E Templates		
		511
	Link Cancel	

- 5. In the **Insert a Link** dialog box, on the **Internal Link** tab, navigate to the RSS feed item that you created earlier, or search for the RSS feed on the **Search** tab.
- 6. Click **Link** to create the link.
- 7. In the Content Editor, save your changes.

For more information about the Sitecore search functionality, see the section Searching in Sitecore.

#### **Previewing the RSS Feed**

Now that you have created the RSS feed for the **News** item, you can preview it to ensure that it works and looks the way you want it to.

To preview the RSS feed:

- 1. In the Content Editor, open the News item.
- 2. Click the **Presentation** tab and then, in the **Preview** group, click **Preview**.

When the RSS feed works correctly, you can publish it on your website.

#### Note

You must publish all the changes that you made before they can be made available on your website.

## A More Complicated Scenario

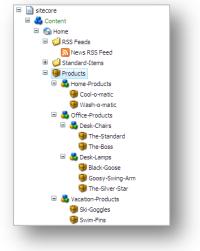
As we mentioned earlier, if the subitems are based on a different template, you must specify how each of these items should be presented in the feed. Let's look at such a scenario.

For example, if you use your website to promote your extensive range of products, you might want to create an RSS feed for your products page. This way customers can keep up to date with the latest changes to you product portfolio.

However, these products are divided into different categories and the website uses different templates.



The content tree might look something like this:



To create an RSS feed for your products:

- 1. Open the Content Editor.
- 2. Select the **Products** item and set up the RSS feed for this item it is the parent item.
- 3. In the **Products** item, insert a link to the feed item.
- 4. Select one of the product categories and click **Presentation**, **Design** to configure how the feed is presented for this item.

If the different product categories use different templates, configure one of each.

5. Select one of the product items and click **Presentation**, **Design** to configure how the feed is presented for one of the individual product items.

Again, if the different product items use different templates, configure one of each.

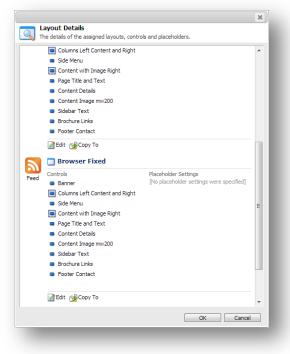
Now you need to make sure the rendering for all the templates used in under the Products item is set up correctly.

To set up the rendering for the feed:

- 1. Locate the templates that are used under the **Products** item.
- 2. Click on the \_Standard Values for a template.



3. Click the Presentation tab, and in the Layout section, click Details.



- 4. In the Layout Details dialog, scroll down to the Section, and click dialog.
- 5. In the Device Editor dialog, click Controls.

Device Ec		
	ditor outs, controls and placeholders for this device.	
Layout Controls Placeholder Settin	<ul> <li>Banner content-banner</li> <li>Columns Left Content and Right page-columns</li> <li>Side Menu column-deft</li> <li>Content with Image Right column-content</li> <li>Page Title and Text content</li> <li>Content Details content</li> <li>Content Image mw200 content-image</li> <li>Sidebar Text column-right</li> <li>Brochure Links column-right</li> <li>Footer Contact footer-right</li> </ul>	Add Edit Personalize Change Remove Test Move Up Move Down
	]	OK Cancel



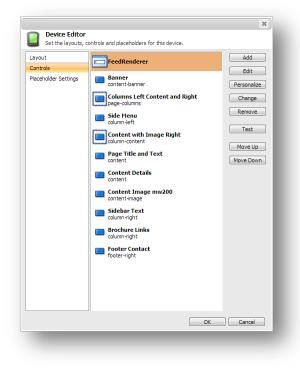
6. Click **Add** and in the **Select Rendering** dialog box, click *Renderings*, *System*, *Feeds*, and then *FeedRenderer*.

				×
🐁 Select a Rendering				
🍯 Select the rendering that you wa	nt to use. Click Sele	ect to continue.		
🖃 💣 Renderings				
<ul> <li>Image: Sample</li> </ul>				
<ul> <li>i i i i i i i i i i i i i i i i i i i</li></ul>				
FieldRenderer				
ItemRenderer				
Feeds				
E FeedRenderer				
DynamicFlashForMarketers				
<ul> <li>Up office Core</li> </ul>				
🗉 🧾 Starter Kit				
Sublayouts				
4 III				
d to Placeholder:				
Open the Properties dialog box imm	diatoly	Select	Cancel	
- Open the Properties tialog box initia	culately.	Select		

7. Click **Select** and the *FeedRenderer* now appears in the list of controls in the **Device Editor** dialog box.

In the **Device Editor** dialog box, you now need to move the *FeedRenderer* up to be the first item in the list.

8. Select the *FeedRenderer* item in the list and then click **Move Up** until it is at the top of the list.



9. Click **OK** and save your changes.



Now complete this setup for all the templates used under the parent item, in this case the *Products* item.

To preview the feed:

- 1. Select the *Products* item and click **Preview** to see a preview of the feed.
- 2. When you are satisfied with the feed, publish all the items that you have modified.

This RSS feed presents a list of all the product category items and product items listed according to date.

Products RSS Feed	Displaying	14/14
You are viewing a feed that contains frequently updated content. When you subscribe to a feed, it is added to the Common Feed List. Updated information from the feed is automatically downloaded to your computer and can be viewed in Internet Explorer and other	• 41	14
programs. Learn more about feeds.		
<b>&amp;</b> Subscribe to this feed	Sort by:	
A Subscribe to this reed	▼ Date	
	Title	
Swim Fins		
11. februar 2009, 15:09:52 🔶		
You'll be a fish in water with these speedy swim fins!		_
Ski Goggles		
11. februar 2009, 15:07:39 🔶		
ind your way down the slopes elegantly with these tinted ski goggles.		
Vacation Products		
11. februar 2009, 15:07:01 🔶		
Get ready to enjoy life! With our vacation products, you'll never want to return home.		
The Silver Star		
11. februar 2009, 15:06:32 🔶		
This elegant best seller looks great and shines bright!		
Goosy Swing-Arm		
11. februar 2009, 15:05:18 🔶		

## 9.1.3 Subscribing to an RSS Feed

When a visitor logs on to the website they can easily subscribe to the RSS feed.

To subscribe to the RSS feed:

1. Open your website in Internet Explorer.



2. Navigate to the item that you have created an RSS feed for — the News page.



3. In the *News* page, click the *Subscribe to an RSS Feed* link to open a new page displaying the RSS feed.

News RSS Feed	Displaying 4/4
You are viewing a feed that contains frequently updated content. When you subscribe to a feed, it is added to the Common Feed List. Updated information from the feed is automatically downloaded to your computer and can be viewed in Internet Explorer and other programs. Learn more about feeds.	• All 4 Sort by:
	Title
utorials Speed Learning Curve	
august 2009, 11:19:33	
e Starter Kit documentation includes many tutorials to help you get up and running quickly.	
ecent News Items Shown on Front Page	
. februar 2009, 15:22:08	
e Home page of you site automatically displays the first three recent news items (sorted by the news ticle date).	
tarter Kit Fully Documented	

4. In the RSS Feed page, click Subscribe to this feed.

<u>&gt;</u>	Subscribe to this Feed When you subscribe to a feed, it is automatically added to the Favorites Center and kept up to date.
Name:	News RSS Feed
Create in:	Feeds   New folder
	Add to Favorites Bar
<u>What is a F</u>	eed? Subscribe Cancel
	iter will periodically check online for updates to feeds, even when Internet Explorer is not running.

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- 5. In the **Subscribe to this Feed** dialog box, give the feed a name and specify where you would like to save it.
- 6. Click **Subscribe** to add the feed to your list of feeds.
- 7. You have now subscribed to this feed. When you open your browser, you can click **Favorites**, **Feeds**, and then click the **News RSS Feed** to see a list of all the news items on this website.



## 9.2 Sitecore Client Feeds

Sitecore also contains a number of client feeds that content authors and other users of Sitecore can subscribe to.

Sitecore contains the following client feeds:

- Content item feeds
- Workflow feeds
- Workflow state feeds

All of these client feeds are dependent on the items in question being subject to workflows.

For information about workflows, see the section Workflows for Content Editors.

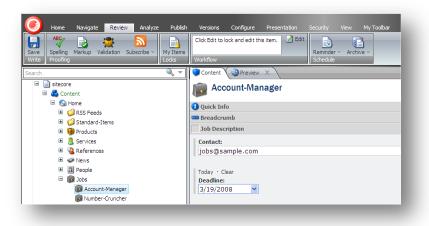
## 9.2.1 Item Feeds

To be informed about any changes that are made to an item in Sitecore, you can subscribe to an RSS feed for that item. You can subscribe to a feed for any item in the Content Editor content tree. However the feed will only contain useful information if the template that the item is based on is subject to a workflow.

To subscribe to a Sitecore item feed:

1. In the **Content Editor**, navigate to the item that you are interested in.

In this example, you are a HR manager who wants to ensure that the text in an item about a job vacancy is correct before it is published on your website. You therefore subscribe to an RSS feed for this particular item.





2. Click the **Review** tab, and then in the **Proofing** group, click **Subscribe**.

Updates to Account-Manager Sitecore item	Displaying	1/1
You are viewing a feed that contains frequently updated content. When you subscribe to a feed, it		
is added to the Common Feed List. Updated information from the feed is automatically downloaded to your computer and can be viewed in Internet Explorer and other programs. Learn more about feeds.	• All	1
Subscribe to this feed		
	Sort by:	
	▼ Date Title	
ew item created	nue	
januar 2008, 16:45:03 🔶		
rsion 1 was created in English language by [Unknown user]		
lome/Jobs/Account-Manager,		
iglish, Version 1		
hat do you want to do with Account-Manager:		
• Edit it		
eview the webpage		

3. In the web page that opens, click **Subscribe to this feed** and add this RSS feed to your favorites.

As you can see the RSS feed does not contain very much information at the moment. However, if a content author edits the item and moves it through the workflow, the feed becomes much more informative. When the item is edited by a content author, a new version is created and placed in the *Draft* workflow state.

After a couple of days, the HR manager decides to check the RSS feed.

In **Internet Explorer**, in the **Favorites** panel, click the **Feeds** tab, and then click the link to the item feed.

News ×						A
avorites Feeds History	Updates to 24. september 2009, 1	Account-Manager Sitecore item			Displaying	1/1
Sitecore Feeds Dupdate to Account-Manager Sitecore item	The Account-	Manager was moved to the Draft workflow	/ state		• All	1
News	24. september 2009, 3	Sort by:				
	The Account-Mar	nager item was moved from to Draft workflow state by <u>a</u>	udrey Normal Content Author Us	ier	- Date Title	
	/Home/Jobs/Acci English, Version				litie	
	What do you wa	int to do with Account-Manager:			View feed properties.	
	<ul> <li><u>Submit</u> or</li> <li><u>Edit it</u></li> </ul>	Submit & comment				
	Version changes					
	Field Title	Previous Version (1)	Current version (2)			
	Breadcrumb Title:	Sname	Sname			
	Contact:	jobs@sample.com jobs@sample.com				
	Deadline:	200910017112600	20091001T112900			
	Menu Title:	Account Manager	Account Manager			
	Title:	Account Manager Account Manager We're looking to expand operations and we want you We're looking to expand operations and we want you to				
	Text:	to help! We expect that you have several years of experience and a proven track record. We offer a fun, fast-pased workplace and competive salaries.	help! We expect that you have s	several years of experience offer a fun, fast-pased		
	Overview Abstract:	Experienced sales representive and partner manager.	Experienced sales representive a	and partner manager.		
	Overview Image Max Width:	100	100			
	Preview the web	2222				
	Workflow histor	y:				
	Date	User		Current Comment State		
	Thursday, Sept 11:08 AM	tember 24, 2009 audrey.normalcontentauthoruser	Esitecore.net	Draft created		
Turn on Suggested Sites_						

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This web page contains some information about the item, including:

- The name of the item.
- Its current workflow state.
- The workflow history of the item.
- A table showing the differences between the new version and the old version of the item.

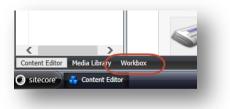
It also contains some workflow commands that let you move the item through the workflow — if you have the appropriate permissions.

#### **Sitecore Workflow Feeds**

Sitecore also contains some workflow feeds that you can subscribe to. For more information on workflows, see the section *Workflows for Content Editors*.

To subscribe to a workflow feed:

1. Open the **Workbox** from the **Sitecore Start** menu. Alternatively you can open the Workbox from the Pages bar at the bottom of the Content Editor.



2. To subscribe to a workflow feed, click the **RSS feed** button to the right of the workflow.

Sample Workflow Items per Page: 10 👻 🏖 Refresh	
/orkflows / View	
Sample Workflow	<mark>⋒</mark> ▲ x
Draft - (1 item)	5
Awaiting Approval - (none)	5
ontent Editor Media Library Workbox	
	S 11:57

For more information on the Workbox, see the section *The Workbox*.



This client feed keeps you up to date on the entire workflow and is useful for administrators and super users who have access to every workflow state that the workflow contains.

september 2009, 1	Sample Workflow workflow				Displaying	2/2
	r.2) has been moved to Awaiting Approval state				• All	2
14. september 2009, 1					Sort by:	
The Older-News It	tern was moved to Awalting Approval state by <u>Audrey Normal Content Auth</u>	tor User			Date	
Home/News/Old English, Version 2	ier-News,				Title	
What do you war	nt to do with Older-News:				View feed propertie	a
	Approve & comment Elect & comment					
/ersion changes:						
Reld Tible	Previous Version (1)		Eurrent version (2)			
Breadcrumb Title:	Older News Articles not Shown on Front Page		Older News Articles not S			
Menu Title:	Old News not on Front Page		Old News not on Front Pa			
Title:	Older News Articles not Shown on Front Page		Older News Articles not S			
Text	As you add more news items, older news automatically fails off the front page. Of course, if you have some "news" that tags hot long after you first reported it, you can add that to the Sidebar text for the front page. That way, visitors will always see it when the open the site.		have some "news" that s			
Date:	200711287120000		200711287120000			
Overview Abstract:	As you add more news items, older news automatically fails off the front p	iage.	As you add more news items, older news automatically fails off the front page.			
Overview Image Max Width:	100		100			
Preview the webox	202					
Workflow histor	y.					
Date	User	Previous Stat	e Current State	Comment		
Thursday, Septe	mber 24, 2009 11:48 AM Jonnie Jimitedcontentauthoruser@sitecore.net		Draft	Item created		
Thursday, Septe	mber 24, 2009 11:54 AM <u>audrey normalcontentauthoruser@sitecore ner</u>	5 Draft	Awaiting Approval	Ready for review		
Account-Man	ager (v.2) has been moved to Draft state					
24. september 2009, 1	10211 🤣					
The Account-Man	ager item was moved to Draft state by <u>Audrey Normal Content Author User</u>					
/Home/Jobs/Acco	unt-Manager,					
What do you war	nt to do with Account-Manager:					
<ul> <li><u>Submit</u> or <u>S</u></li> <li>Edit it</li> </ul>	ubmit & comment					

3. To subscribe to a workflow state feed, click the **RSS feed** button for the workflow state.

This client feed keeps you up to date on this particular workflow state. This client feed is useful for content authors and managers who only have access to particular workflow states.

	Draft state of the Sample Workflow workflow				Displaying 2/2
	ws' item has moved to the 'Draft' workflow state.				• All 2
24. september 2009, 1					Sort by:
/Home/News/Old English, Version 2					Date
-					Title
What do you war	nt to do with Older-News:				
<ul> <li><u>Submit</u> or <u>S</u></li> <li><u>Edit it</u></li> </ul>	ubmit & comment				View feed properties
Version changes:					
Field Title	Previous Version (1)		Current version (2)		
Breadcrumb	Older News Articles not Shown on Front Page		Older News Articles not Show	in on Front Page	
Title: Menu Title:	Old News not on Front Page		Old News not on Front Page		
Menu Title: Title:	Old News not on Front Page Older News Articles not Shown on Front Page		Old News not on Front Page Older News Articles not Shov	in an Event Dawn	
1102	As you add more news items, older news automatically fails off the front pa				
Text	if you have some "news" that stays hot long after you first reported it, you ci	an add that to	have some "news" that stays	hot long after you first reported it, you can add that to the Sidebar	
	the Sidebar text for the front page. That way, visitors will always see it when site.		text for the front page. That v open the site.	ay, visitors will always see the important news items when they	
Date	ste. 20071128T120000		open the site. 20071128T120000		
Overview	As you add more news items, older news automatically fails off the front oa			older news automatically fails off the front page.	
Abstract:					
Overview Image Max Width:	100		100		
Preview the webo					
Date	User	Previous Sta	ite Current State	Comment	
Thursday, Septe	mber 24, 2009 11:48 AM lonnie limitedcontentauthoruser@sitecore.net		Draft	Item created	
Thursday, Septe Thursday, Septe	mber 24, 2009 11:48 AM <u>ionnie limitedcontentauthoruser@sitecore net</u> mber 24, 2009 11:54 AM <u>audrey normalcontentauthoruser@sitecore net</u>	Draft	Draft Awaiting Approval	Item created Ready for review	
Thursday, Septe Thursday, Septe	mber 24, 2009 11:48 AM lonnie limitedcontentauthoruser@sitecore.net	Draft	Draft	Item created	
Thursday, Septe Thursday, Septe Thursday, Septe	mber 24, 2009 11:48 AM <u>ionnie limitedcontentauthoruser@sitecore net</u> mber 24, 2009 11:54 AM <u>audrey normalcontentauthoruser@sitecore net</u>	Draft	Draft Awaiting Approval	Item created Ready for review	
Thursday, Septe Thursday, Septe Thursday, Septe	mber 24, 2009 11-48 AM <u>forma limbedcontentauthouster@stectora.net</u> mber 24, 2009 11-54 AM <u>audien normalcontentauthouster@stectore.net</u> mber 24, 2009 11-29 M stectoreladmin Manager' Item has moved to the 'Draft' workflow state.	Draft	Draft Awaiting Approval	Item created Ready for review	
Thursday, Septe Thursday, Septe Thursday, Septe The 'Account- 24. september 2009, 1 (Home/Jobs/Acco	mber 24 2009 11-48 AM gond Immediometrachoused Batagos net mber 24 2009 11-54 AM auger normationerers shouse Batagos net mber 24 2009 11:54 AM auger normationerers shouse Batagos net mber 24 2009 11:54 M anager (Item has moved to the 'Draft' workflow state. Sing Immediate State	Draft	Draft Awaiting Approval	Item created Ready for review	
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Thursday, Septe Thursday, Septe Thursday, Septe The 'Account- 24. september 2009, 1 (Home / Jobs / Acco English, Version 2 What do you war	mar H. 2003 11-41 AM.         provide interconversion/transactifications and autors conversions.           mar H. 2003 11-24 AM.         provide interconversion.           provide 22.000 11-27 AM.         provide and provide and autors and provide and	Draft	Draft Awaiting Approval	Item created Ready for review	
Thursday, Septe Thursday, Septe Thursday, Septe The 'Account- 24 september 2000, 1 (Home/Jobs/Acco English, Version 2 What do you war Submit or 2	more 14. 2003 14.4 AM increases metro 24. 2003 14.4 AM increases metro 24. 2003 14.4 AM increases metro 24. 2003 14.1 AM increases metro 24. 2003 14.1 AM increases metro 24. 2003 14.1 AM increases Manager i teen has moved to the 'Draft' workflow state. Increases Manager i teen has moved to the 'Draft' workflow state. Increases Manager i teen has moved to the 'Draft' workflow state. Increases Manager i teen has moved to the 'Draft' workflow state. Increases Manager i teen has moved to the 'Draft' workflow state.	Draft	Draft Awaiting Approval	Item created Ready for review	
Thursday, Septe Thursday, Septe Thursday, Septe The 'Account- b4 september 2009, 1 (Home/Jobb/Acco English, Version 2 What do you war <u>Submit</u> or <u>§</u> <u>Editit</u> Version changes:	more 14. 2003 14.4 AM increases metro 24. 2003 14.4 AM increases metro 24. 2003 14.4 AM increases metro 24. 2003 14.1 AM increases metro 24. 2003 14.1 AM increases metro 24. 2003 14.1 AM increases Manager i teen has moved to the 'Draft' workflow state. Increases Manager i teen has moved to the 'Draft' workflow state. Increases Manager i teen has moved to the 'Draft' workflow state. Increases Manager i teen has moved to the 'Draft' workflow state. Increases Manager i teen has moved to the 'Draft' workflow state.	Draft Awalding Ap	Draft Awaiting Approval	Item created Ready for review	
Thursday, Septe Thursday, Septe Thursday, Septe Thursday, Septe The 'Account- S4, september 2000, 1 (Home/Jobb/ Acco English, Version 2 What do you was e. Submit or 5 . Sett it Version changes: Field Title	mere 24. 2003 11-44. Auf mere 24. 2003 11-24.	Draft Avvalding Ap	Draft Analting Approval proval Draft	Item created Ready for review	
Thursday, Septe Thursday, Septe Thursday, Septe The 'Account- 64. september 2009, 1 (Home/Jobs/Acco English, Version 2 What do you war 6. Submit of 5 7. Edit It	mere 24. 2003 11-44. Auf mere 24. 2003 11-24.	Draft Avvalding Ap	Draft Anating Approval Draft Draft	Item created Ready for review	

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## Using the RSS Feeds

When you have subscribed to a workflow feed, you can use the RSS Feed to perform the tasks that you have permission for.

For example, in the following feed:

Updates to Acco 24. september 2009, 14:07:2	ount-Manager Sitecore item	
The Account-Mana	ger was moved to the Awaiting A	pproval workflow state
24. september 2009, 14:07:2	2	
The Account-Manager it	em was moved from Draft to Awaiting Appr	oval workflow state by Audrey Normal Content Author User
-	lo with Account-Manager:	
<ul> <li><u>Approve</u> or <u>Appr</u></li> <li><u>Reject</u> or <u>Reject &amp;</u></li> <li><u>Edit it</u></li> </ul>		
Version changes:		
Field Title	Previous Version (1)	Current version (2)
Breadcrumb Title:	Sname	\$name
Contact:	jobs@sample.com	jobs@sample.com
Deadline:	20091001T112 <b>6</b> 00	20091001T112 <b>9</b> 00
Menu Title:	Account Manager	Account Manager

The user can:

- Approve or reject the item.
- Approve or reject the item and insert a comment.
- Edit the item.

If you click Reject & comment, the following page appears:

🙁 Reject		

Enter your comment and then click **Reject** to send the item back to the previous workflow state.

#### Important

You must select the **Remember me** check box on the Sitecore login page to perform these tasks without having to log in.

If you haven't selected the **Remember me** check box, you must log in before you are directed to the appropriate page.



## 9.3 Security and Client RSS Feeds

RSS technology is designed so that users who follow an RSS link can come directly to the item specified in the URL of the RSS feed. Most RSS readers do not support authentication. This means that users who subscribe to Sitecore client RSS feeds have direct access to the item specified in the URL of the RSS feed and do not have to identify themselves to the Sitecore security system when they view the RSS feed. However, the Sitecore security system verifies that they are authorized users when they try to perform any actions associated with the client feed.

If someone else gains access to the URL of the RSS feed:

- They *can* follow the link and view all the content contained in the RSS feed even though their own security permissions do not give them access to this item.
- They cannot perform any actions on the content.
- They cannot view any other content.
- They cannot gain access to the username or password of the original owner of the RSS feed.
- They cannot modify the link to gain access to any other content.

#### Important

Sitecore users should not share RSS feeds.

For more information about tightening security around RSS feeds, see the *Sitecore Security Hardening Guide*.



# Chapter 10

# **Workflows for Content Editors**

This chapter describes workflows, what you can use them for, and how they are implemented in Sitecore. There is also a description of the Workbox that reviewers use to move items through workflows.

- Workflows
- The Workbox



## 10.1 Workflows

Workflows are a system that you can use in Sitecore to control when a content item is published.

A workflow is a series of states that you define. These states should reflect the work processes and procedures that have been implemented in your organization for creating web content. These states can correspond to the creation, review, and approval stages that content items must go through before they are published on your website.

Workflows are a way of formalizing and enforcing these processes and procedures to ensure that only content items that have been approved are published.

A workflow can contain any number of different workflow states and be as simple or complex as required. Content items do not necessarily have to pass through all the workflow states that you have defined — some states can be optional or only applicable for certain kinds of content.

Furthermore, you can implement any number of different workflows. Each workflow must as a minimum contain two workflow states, one that has been defined as the initial workflow state and one that has been defined as the final workflow state.

Content items must pass through the appropriate workflow states and can only be published when they are in the final workflow state.

## 10.1.1 Implementing Workflows

Workflows are normally implemented by developers. It can however be useful for content authors to understand how they are constructed and implemented.

Workflows consist of special items that are stored in the Sitecore content tree.

A workflow consists of:

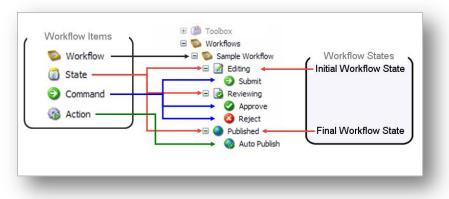
A Workflow — the main item that contains all of the subitems that make up the workflow.

**Workflow States** — the basic building blocks of the workflow. The workflow states represent the different stages in your content creation process. Content items that are sent through a workflow start in the initial workflow state and finish in the final workflow state.

**Workflow Commands** — the actions that must be performed by the various contributors to move the content items from one workflow state to another.

**Workflow Actions** — actions that are automatically performed on the content items when they are in particular workflow states or when particular workflow commands are executed.

Here is an example of a workflow:



After the workflow has been defined, the developer specifies which item templates are subject to the workflow. When they have done this, every time a content author creates or edits a content item that

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is based on one of these templates the content item is sent to the initial workflow state of this workflow.

#### Important

Content items can only be published when they are in the final workflow state.

## 10.1.2 Using Workflows

After the workflow has been implemented, content authors must send the content items they create or edit through the workflow before they can be published.

When you create a new content item, it is automatically placed in the initial workflow state. The content item remains in the initial workflow state until you use a workflow command to move it to another workflow state.

If you edit an existing content item that is subject to a workflow, Sitecore creates a new version of this content item and places it in the initial workflow state. If you edit this content item again later, you edit the version that is in the workflow unless you specify that you want to edit another version.

#### Important

Content items that are edited by administrators are not subject to workflows.

#### Moving Items through a Workflow in the Page Editor

When you have finished editing the content item, you can send it to the next workflow state.

To send a content item to the next workflow state:

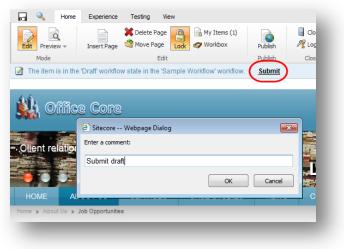
- 1. In the Page Editor, navigate to the page you want to work on.
- 2. Edit the page and save your changes. If the page you are editing is part of a workflow, you will see all workflow commands in the Page Editor.



In the Page Editor, there is a notification bar that displays a workflow command — *Submit*. This is the only workflow command that you can apply to the current page in its present workflow state.



3. Click **Submit** to send the content item to the next workflow state. Sitecore displays a dialog box for you to enter a comment.



4. Enter a comment and then the content item is moved to the next workflow state.

The workflow commands that are available in the Page Editor change to reflect the item's new status.



However, if you do not have permission to edit the content item in this workflow state, you cannot lock the item for editing and the workflow commands will not be displayed.

#### Moving Items through a Workflow in the Content Editor

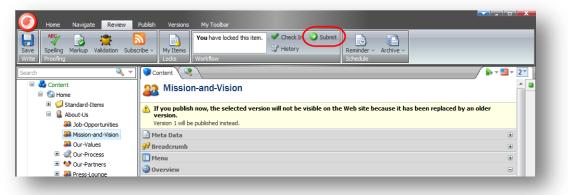
When you have finished editing the content item, you can send it to the next workflow state.

To send a content item to the next workflow state:

1. In the Content Editor, open the content item that you are working on.



2. When you are satisfied that it can be sent on through the workflow, click the **Review** tab.



As you can see, the **Workflow** group displays a workflow command — *Submit*. This is the only workflow command that you can apply to the current content item in its present workflow state.

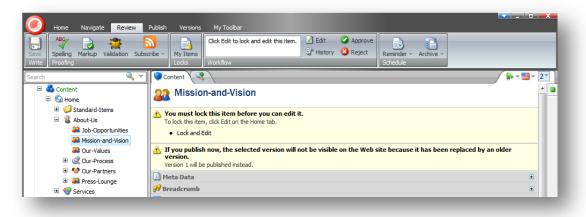
Furthermore, the content item also displays a message informing you that this version of the item cannot be published because it is not in the final workflow state.

3. Click **Submit** to send the content item to the next workflow state. Sitecore displays a dialog box for you to enter a comment:

	🗿 Sitecore Webpage Dialog	<b>—</b>
	Enter a comment:	
OK Cancel	Submit draft	
		OK Cancel

4. Enter a comment and then the content item is moved to the next workflow state.

The workflow commands that are available in the **Workflow** group change to reflect the item's new status.



However, if you do not have permission to edit the content item in this workflow state, you cannot lock the item for editing and the workflow commands will not be displayed.

Sitecore also contains a Workbox that been designed to give reviewers a greater overview of all the content items that are currently in workflows.

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## 10.2 The Workbox

The Workbox is a tool for reviewers and managers and gives them the overview they need to perform their tasks.

## **10.2.1 Using the Workbox**

When you need to review content items, you should use the Workbox to see all the content items that are currently in workflows and which workflow states they are in.

To use the Workbox:

- 1. Log in to the **Sitecore Desktop**.
- 2. Click the Sitecore Start button and then Workbox.

Workbox Analytics Wor Sample Workf orkflows	terms part ager as	-
San	nple Workflow	<mark>∭ ▲</mark> X
Draft	- (none)	<b>N</b> 📀
	ing Approval - (2 items) Iob-Opportunities - (English, version 2)	200
	ast change: audrey changed from Draft to Awaiting Approval on Thursday, February 28, 2013. More 🕶	
	🖻 Preview 🖻 Open 🔌 Diff 🥝 Approve 🔇 Reject	
E 🏭	fission-and-Vision - (English, version 2)	
L	ast change: audrey changed from Draft to Awaiting Approval on Thursday, February 28, 2013. More 🔻	
6	🗟 Preview 🗟 Open 🖏 Diff 🥝 Approve 🥸 Reject	
<b>•</b> •	e (selected) 🔮 Approve (all) 🥸 Reject (selected) 🥸 Reject (all)	

In the **Workbox**, you can see that the *Sample Workflow* has been selected and you can see all the relevant workflow states. You can also see that there is one content item in the *Awaiting Approval* workflow state.

3. In every workflow state, you can preview, open, compare, each content item as well as apply the workflow commands that have been defined for that workflow state.

In the Awaiting Approval workflow state, you can approve, or reject the content item.

#### **Previewing an Item**

To preview the version of a content item that is in a workflow state, click **Preview** and this version of the item is displayed in a new browser window.

#### **Opening an Item**

To open a content item, click **Open** and the item is opened in the Content Editor.



## Comparing an Item

To see the changes that have been made to a content item, click Diff.

ne Column				
2	▼ 1	•		
Meta Data	6			
Browser Title:				
Office Core Missio	on and Vision			
Meta Description:		E		
construct <del>s</del> physi	founded <mark>s ign \$1986</mark> and <b>w</b> e design and ical business environments that improve workflow, nd- improve productivity.			
Meta Keywords:				
	a design, services, service package, consulting, iishings, fittings, furniture, <del>accessories,</del> mission,			
Breadcrumb	0			
Breadcrumb Title:	0			
Breadcrumb Title:	ن ا			
Breadcrumb Title:	ි 1 ල	n		
Breadcrumb Title: Mission and Vision Menu Menu Title:	6	h		
Breadcrumb Title: Mission and Vision Menu Menu Title:	6	n		
Menu Mission and Vision Menu Menu Title: Mission and Vision	6	Ì		
Breadcrumb Title: Mission and Visior	6	)		
Menu Mission and Visior Menu Title: Mission and Visior Menu Tooltp:	6	Ŧ		

The **Compare Versions** dialog box lets you see the changes that have been made to this version of the item. You can select which versions to compare and whether you want them displayed in one or two columns.

#### Approving or Rejecting an Item

When you are finished reviewing the content item, click **Approve** or **Reject** to move it to the appropriate workflow state.

## 10.2.2 Several Workflows

If you have implemented more than one workflow, you can view them at the same time or switch between the different workflows in the Workbox.

Samola Workflow	N * X
Draft - (none)	S ()
Awaiting Approval - (2 items)	S @
32 Job-Opportunities - (English, version 2)	
Last changes audrey changed from Draft to Awaiting Approval on Thursday, February 28, 2013. More -	
🗟 Preview 🙆 Open 🖏 Diff 🥥 Approve 🥝 Reject	
Mission-and-Vision - (English, version 2)	
Last change: audrey changed from Draft to Awaiting Approval on Thursday, February 28, 2013. More +	
🗟 Preview 🙆 Open 🖄 Diff 🥝 Approve 🔇 Reject	
Approve (selected) 🖉 Approve (all) 🥝 Reject (selected) 🥸 Reject (all)	
Analytics Workflow	<mark>∑</mark> ≁ X
Draft - (none)	<b>N</b> 0

To display or hide a workflow in the **Workbox**, select or clear the check boxes in the **Workflows** group. You can also expand and collapse each workflow and workflow state.



# **Chapter 11**

## **Customizing the Interface**

You can change the interface in Sitecore. This chapter describes how to increase usable screen space, customize the interface in the Content Editor and in the Page Editor. There is also a description of how to customize the Sitecore Desktop.

This chapter contains the following sections:

- Working with the Browser
- Customizing the Content Editor
- Customizing the Page Editor



# 11.1 Working with the Browser

All of the interfaces and programs that Sitecore contains are displayed in a normal web browser.

## 11.1.1 Full Screen Mode

If you need to see more of the web page or item that you are editing because there are too many elements in the way or because you are using a computer with a small screen, you can gain some space by expanding the browser interface to full screen mode.

To enable full screen mode, press F11. This expands the browser window to fill the entire screen and hides the user interface elements of the browser — the title bar, menus, toolbar, and status bar.

To see some of hidden user interface elements, move your mouse to the top of the screen. Press F11 again to restore the hidden browser user interface elements and exit full screen mode.

## 11.1.2 The Sitecore Desktop

When you are using the Sitecore Desktop application you can change some of the settings that affect the way Sitecore looks and customize other settings to suit your needs.

In the Sitecore Desktop, you can:

- Change the desktop background.
- Change your password.
- Change the application options.
- Change your personal information.
- Change the language settings.

## **Changing the Desktop Background**

You can change the image displayed as your desktop background when you log in to the Sitecore desktop.

To change the desktop background:

- 1. Log in to the Sitecore Desktop.
- 2. Click the Sitecore menu and then click Control Panel, Preferences.

Preferences	🚮 Home
ick a task	
Change Your Desktop Background	
Change Your Application Options	
Change Your Password	
Change Your Personal Information	
Set Your Regional and Language Options	
2 Reset My Settings to Default Values	



3. In the Preferences dialog box, click Change Your Desktop Background.

Sitecore Webpage Dialog	×
Desktop Background Select a desktop background.	
	- o
Background:	
(None)	Position:
Blue	Center •
Building	Color:
Chameleon cape Keyboard	
Lighthouse	
Pine neddles	
Sparkle	
Stairs	
Sudak still rocky shore Working	
	Apply Cancel

- 4. In the **Background** field, select the image that you want to use.
- 5. In the **Position** field, use the drop-down arrow to select how you want to place the image on the desktop.
- 6. In the **Color** field, select the color you want to surround the image if it does not fill the screen.

#### **Changing Your Password**

To change your password:

- 1. In the **Sitecore Desktop**, click the **Sitecore** menu and then click **Control Panel**, **Preferences**.
- 2. In the Preferences dialog box, click Change Your Password.

Enter your curren	<b>rord</b> t and new password.		
Password: New Password: Confirm New Password:	1	Change Password	Cancel

3. In the **Change Password** dialog box, enter your current password and then enter and confirm your new password.



You can also change your password in the Sitecore log in page.

Welcome to Sitecore	
User name: minnie	
Password: •	
Remember me	
Login	
Forgot Your Password Change Password	

### **Changing your Personal Information**

To change your personal information:

- 1. In the Sitecore Desktop, click the Sitecore menu and then click Control Panel, Preferences.
- 2. In the **Preferences** dialog box, click **Change Your Personal Information**.

🚺 Cha	inge your pe	rsonal information.	
Full Name:	My New I	Name	
Email:	mynewna	me@address.net	
Portrait:	2	User1 User2.png Angel.png Astrologer.png Dude1 Dude2.png Dude3	
			OK Cancel

3. In the **Personal Information** dialog box, you can change your name, e-mail address, and the image that is used as your portrait throughout Sitecore.

#### **Changing Your Regional and Language Options**

To change your regional and language options:

1. In the Sitecore Desktop, click the Sitecore menu and then click Control Panel, Preferences.



2. In the Preferences dialog box, click Set Your Regional and Language Options.

🕘 Sitecore Webpage Dialog 🛛 🛃
Regional and Language Options Change your regional settings to reflect your preferences.
Standard and Formats: This option affects how numbers, currencies, dates and time are formatted.
Select an item to use its preferences.
Default
Samples:
Number: 123,456,789.00
Currency: ¤123,456,789.00
Time: 14:47
Short date: 01/18/2013
Long date: Friday, 18 January 2013
Client Language
Select the language to use in the client application.
English
Apply Cancel

- 3. In the Regional and Language Settings dialog box, you can:
  - o Select the formats that you want to use for numbers, currencies, times, and dates.
  - $\circ$   $\;$  Select the language that you want the client application to use.

#### **Using the Default Settings**

To use the default settings:

- 1. In the **Sitecore Desktop**, click the **Sitecore** menu and then click **Control Panel**, **Preferences**.
- 2. In the Preferences dialog box, click Reset My Settings to Default Values.



# **11.2** Customizing the Content Editor

The Content Editor contains a number of user interface elements that you can.

You can, for example, give yourself more room to work in by:

- Customizing the ribbon.
- Customizing the content tree.
- Resizing the editing pane.

## 11.2.1 Customizing the Ribbon

There are several ways in which you can customize the ribbon.

You can:

- Hide the ribbon.
- Hide the tabs.
- Create your own toolbar

## Hiding the Ribbon

To hide the ribbon in the Content Editor:

1. Double-click any tab to hide the ribbon.

Home Navigate	Review Publish	Versions Configure	View <u>Developer</u>	
arch	9	- Content		🔶 v 🛄 v 🚺 v
<ul> <li>sitecore</li> <li>Gontent</li> </ul>		🤦 Sidebar		

The ribbon is removed but the tabs are still displayed.

2. Click on a tab to open that tab and display the ribbon again.

## **Hiding Tabs**

You can also specify which tabs are displayed in the Content Editor.

To hide a tab:

1. Right-click anywhere on the ribbon to open a dialog box.

_		
~	Home	
~	Navigate	
~	Review	
~	Publish	
~	Versions	
~	Configure	
~	Presentation	
~	Security	
<b>~</b>	View	
<b>~</b>	My Toolbar	
	Developer	
	Reset	
	Customize	



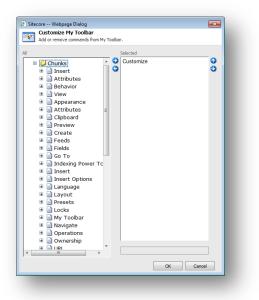
- 2. Select or clear the check boxes to decide which tabs you want displayed in the **Content Editor**.
- 3. Click reset to restore the default tab selection.

## Creating your own Toolbar

You can also create your own toolbar that only contains the tools and functionality that you need to do your work.

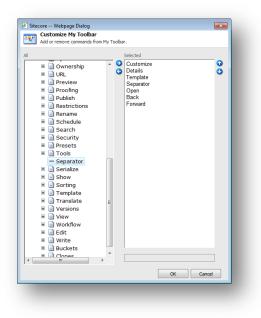
To create your own toolbar:

1. Right-click anywhere on the ribbon and click **Customize** to open the **Customize My Toolbar** dialog box.



2. In the All pane, expand the groups and select the commands that you want on your toolbar.

You can only select commands and not groups. You can however insert separators to divide them into groups and use the up and down arrows to place the commands in the order you want.





- 3. When you are finished, click OK.
- 4. Right-click on the ribbon to open the tabs dialog box and select the **My Toolbar** tab. The tab is added to the ribbon and contains all the command that you just selected.

1		(CA)	Сору	a About	Us Section	(1 of 10)	📩 🎹 Rename	ABC		
ve		Paste	ANTERN - 1993 (A	Contac	t Section	(2 of 10)	-	Spelling		
ite	My Buttons									

## **11.2.2** Customizing the Content Tree

In the Content Editor, you can easily resize the content tree pane or hide the content tree entirely if you prefer.

## Hiding the Content Tree

To hide the content tree:

1. In the **Content Editor**, click the **View** tab.

	Home Naviga	ite Review	Publish	Versions	Configure	Presentation	View
	Content Tree	Hidden It	ems	Raw Values			
<b>]</b> /e	Entire Tree	Standard	Fields				
ite	View						

- 2. Clear the Content Tree check box to hide the content tree.
- 3. Clear the **Entire Tree** check box to hide the root of the content tree (sitecore) and the Media Library. This view ensures that users can only see the items that are part of their website.
- 4. Clear the **Hidden Items** check box to hide some of the system items that are displayed in the content tree.

The other two settings — **Raw Values** and **Standard Fields** are only relevant for administrators.

#### **Resizing the Content Tree**

You can also resize the content tree. This can be useful when you need to find an item or when the pane takes up too much space.

To resize the content tree:

- 1. In the **Content Editor**, move the mouse over the bar between the Content Tree and the **Editing** pane.
- 2. Drag the bar to the left or right to resize the elements in the window.



## Configuring the Quick Action Bar

The Quick Action Bar runs down the side of the content tree and can be used to display information that can be useful to both the content author and the administrator.

	Search	Q +
Quick Action Bar ——	8 0 8 0 8 0 8 0 8 0 8 0 8 0 8 0 8 0 8 0	httent Sample Help Meta-Data Settings yout edia Library
		_

To configure the Quick Action Bar:

1. Right-click the Quick Action Bar to see a list of the elements that it can display.

~	Item Buckets
	Cloned Items
	My Locked Items
	Locked Items
	Workflow State
	Broken Links
	Missing Versions
	Publishing Warnings
	Validation Rules
	Presentation Overriden
ළ	Refresh

2. Click an item in the menu to hide or display an icon beside the item that is affected. You can select the following items:

Menu Item	Tells you
Item Buckets	Which items are item buckets.
Cloned Items	Which items are clones.
My Locked Items	Which items you have locked.
Locked Items	Which items have been locked by another user and who locked it.
Workflow State	The workflow state of the item.
Broken Links	Which items contains broken links.
Missing Versions	Which items are missing a version.
Published Warnings	Which items have published warnings.
Validation Rules	Which items contain validation errors.
Presentation Overridden	Which items have the layout settings that are defined in the template they are based on overridden by another layout.



#### Note

The items that are available in this menu in your Sitecore solution may vary from the ones shown here. This is controlled by your Sitecore system administrator.

You can select as many of these options as you like. There is a performance overhead to pay for each of these options.

#### Important

The Validation Rules and Broken Links options are the most costly of the Quick Action Bar options. Each time you open an item in the content tree the client must make a server call to refresh these options.

## 11.2.3 Changing the Application Options

When you are using the Content Editor, you can also specify which elements of the Content Editor application should be displayed.

To configure the Content Editor:

1. In the Content Editor, click on the Sitecore button in the top left-hand corner.



Alternatively, in the **Sitecore Desktop**, click the **Sitecore** menu and then click **Control Panel**, **Preferences**.

2. Click Application Options to open the Application Options dialog box.

Application Options	
Content Editor View Media	
Show/Hide	
V Item Title Bar	
Field Section Titles	
Fields from the Standard Template	
Bucket Items	
✓ Hidden Items	
Quick Info Section	
Quick Action Bar	
Seach Panel	
Validator Bar	
Use Smart Tags	
Prefetch Collapsed Sections	
Content Profiling	
Field Values	
Show Input Controls	
Show Raw Values	
Pages	
Show Pages Bar	
	OK Cancel

3. Select or clear any of the check boxes to hide or show the element in question.



The following screenshot points out where most of these elements are found in the Content Editor:

Home Navigate Review	Analyze Publish Versions Configure Presentation Security View My Toolbar		
The Section	(1 of 2) 🚖 📭 🌝 Copy To 💥 🔐 🏫 Cut 🔟 Rename 🔦 Up 🌲 First		
Save Edit Insert from Template	e (2 of 2) 👻 Duplicate 🗸 🔂 Move To Delete 🗸 Paste 🖾 Copy 🍸 Display Name 💙 Down 😻 Last		
Search Panel Write Edit Insert G	Operations Clipboard Rename Sorting F2		
Search 🔶 🔍 🗸	Content 3	→ + + + + + + + + + + + + + + + + + +	-
Item Title Bar 🛛 🖃 📄 sitecore	Home		on Bar
🖃 🍓 Content	The start page of a site. Also known as the Home page.		
□ G Home     □ G Standard-Items	Quick Info	Content P	rofilinc
Standard-Items     About-Us	Then TD: (managed and managed and managed)	=	-
🗉 🌚 Services	Item ID: {4E7AB8B1-6A39-4C8C-BF5B-816F8105BFFD}		
Quick Info Section 🗉 🖪 Case-Studies	Item Name: Home		
Tiews	Item Path: /sitecore/content/Home		
Quick Action	Template: /sitecore/templates/Starter Kit/Item Types/Site Root - {54C60AED-31AF-400E-8106-17C3BF28E3A1}		
Bar 🗷 🕅 RSS-Feeds	Created From: [unknown]		
Bettings     Bettings     Bettings     Bettings	Item Owner: [unknown]		
🖉 🔯 Mada Library	D Meta Data		
Hidden Items	anner		
🗉 🛃 Templates	Banner Slogan:		
	Office Core		
Field Section Titles			
		-	
	Browse · Properties · Open Media Library · Edit Image · Clear · Refresh		
	Banner Image:		
	/Images/Banners/bannerDesk2		
	Dimensions: 980 x 102		
	Default Alternate Text: "desk"		
Content Editor Media Library Workbox			
💽 sitecore 🚽 😽 Content Editor		<b>I</b> 4:47	

The remaining elements in the Show/Hide section are:

Section	Field	Description
Show/Hide	Bucket Items	Display the otherwise hidden items in an item bucket in a folder structure. It is recommended to clear this check box, because it will prevent the system from unnecessarily loading all the items in the content tree.
	Fields from the Standard Template	Display a large number of fields that are used internally by Sitecore. These are hidden to improve performance
	Use Smart Tags	An alternate way to show the commands associated with a field.
	Prefetch Collapsed Sections	The system fetches and keeps the fields from the Field Sections in memory before the section is even opened.
Field Values	Show Input Controls	Shows the field values as input controls. This is only relevant for administrators.



Section	Field	Description
	Show Raw Values	Shows the field values as raw values. This is only relevant for administrators.
Pages	Show Pages Bar	Determines whether or not the shortcuts to the Sitecore applications are displayed at the bottom of the Content Editor. Pages Bar Content Editor Workbox

4. Click the **View** tab of the **Application Options** dialog box for more options on what should be viewed in the Content Editor.



Section	Field	Description
Content Tree – Item Names	Display Name (language- specific name)	Select to show the language specific display name that you can give an item.
	Item Key	Select to show the item key in the content tree.
Content Tree Root	Show the Content Tree in the Content Editor	Show the content tree in the Content Editor.
	Show Entire Content Tree	Show the entire content tree in the Content Editor. Clear the check box to show only the Content node in the content tree.
Control Properties	Show the Personalization Section	To be used only in the Marketing Center.
	Show the Test Lab Section	To be used only in the Marketing Center.



5. Click the **Media** tab for what should be showed in the Drag & Drop dialog or whether to open the editing application available on the user's computer.

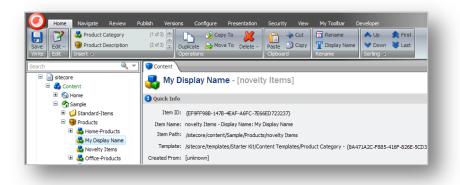


Section	Field	Description
Drag & Drop	Show only latest version of files	Select to show only the latest version of the media files in the Drag & Drop dialog box.
	Show versioned files in folders	Select to show all versions of a media file in the Drag & Drop dialog box.
Media Edit Button Default	Open editing application installed on user's computer.	Open the media items with the editing application that is installed on the user's computer.

## Setting the Display Name of an Item

To set the display name of an item:

- 1. In the **Content Editor**, select the item in the content tree.
- 2. On the Home tab, in the Rename section, click Display Name.
- 3. When you are prompted, enter the name that you want displayed in the dialog box that appears.
- 4. Refresh the content tree and the display name is visible.



In the **Content** pane, the key is shown after the display name.

Furthermore, the display name is also used for the item in the published website.



# 11.3 Customizing the Page Editor

You can customize the Page Editor. However, it has limited functionality available for you to change

## 11.3.1 Working with the Ribbon

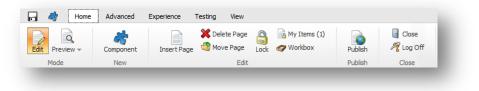
The functionality that is available to you in the Page Editor is determined by the roles that your site administrator has assigned to you.

### Hiding the Ribbon

If you only have limited access to the functionality contained in the Page Editor, you can hide the ribbon to give yourself more space to work with.

To hide the ribbon:

1. Log in to the **Page Editor**.



- 2. Click the **Toggle the ribbon** button at the top of the screen to hide the ribbon.
- 3. When you need to use the ribbon, click **Toggle the ribbon** button A and it appears again.

## Changing the Interface

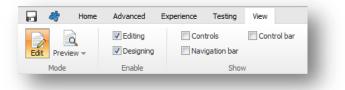
If you have access to more functionality in the Page Editor, you can also change the way the Page Editor presents editable items to you.

To change the interface:

1. Log in to the Page Editor.



2. In the Page Editor, click the View tab.



- 3. In the View tab:
  - To edit the page text, select the **Editing** check box.
  - To edit renderings and placeholders, select the **Designing** check box.

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- To show outlines of all the selectable objects on a page, select the **Controls** check box. Use this feature to understand how the page is organized.
- $\circ$  To display the Navigation bar, select the Navigation bar check box.