Sitecore CMS 7.1

Content Author's Reference and Cookbook

A Conceptual Overview and Practical Guide to Using Sitecore

Table of Contents

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.
- **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:

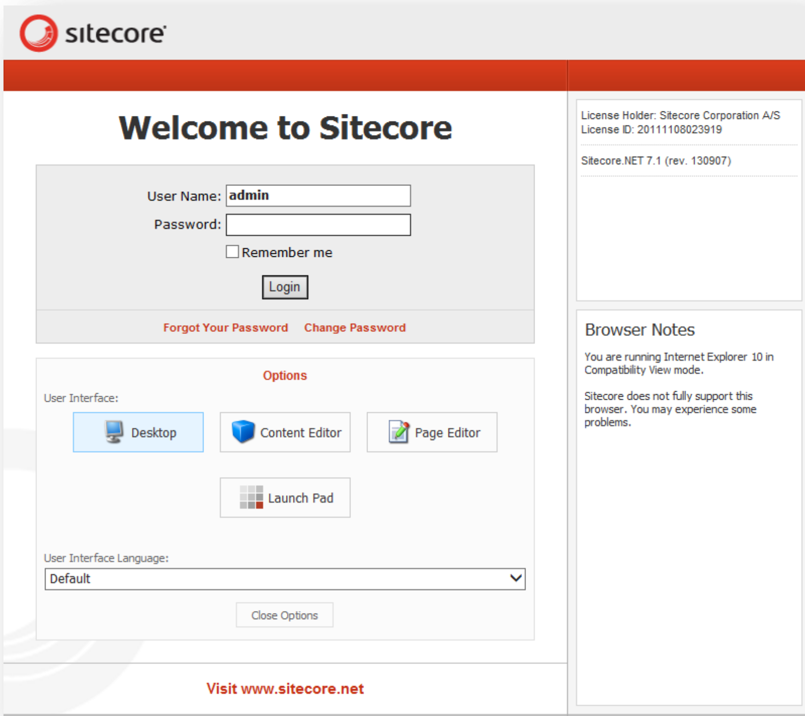
- Logging In
- Roles and Functionality
- Item Locking
- Formatting

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.



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.

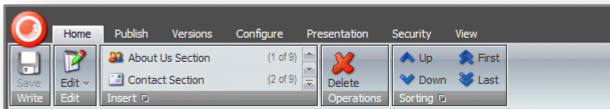
Configuring Sitecore on Internet Explorer

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

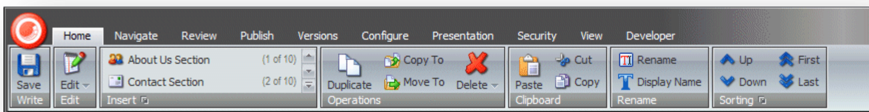
2.2 Roles and Functionality

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.

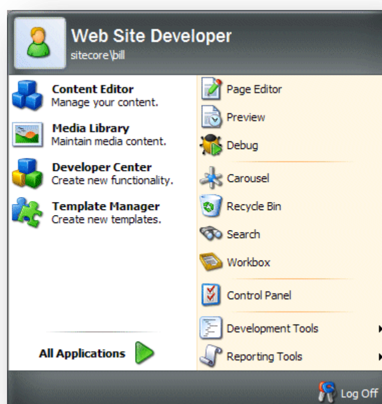
For example, a user who has been assigned one set of roles may see the following ribbon in the Content Editor.



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



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:



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.

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

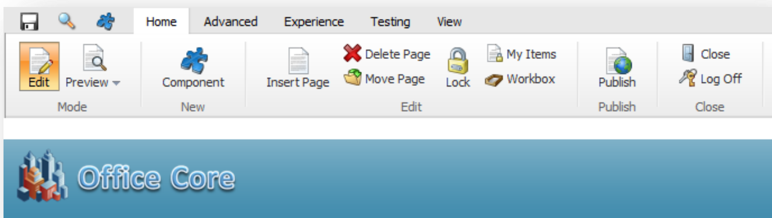
3.1 The Page Editor

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.

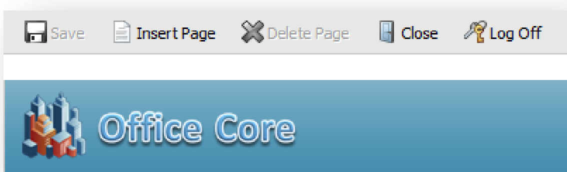
With this mind, Sitecore CMS allows content authors to edit and create items directly on the web page with the Page Editor. The Page Editor is the simplest of the editing tools that Sitecore provides. It is designed for inexperienced content editors who edit and write content items directly on the page. 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 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 again to display the ribbon.

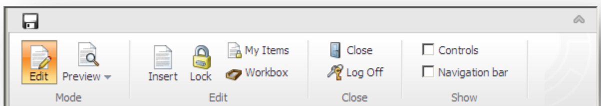
3.2 Locking Items in the Page Editor

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.

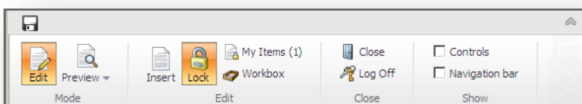
3.2.1 Locking in the Limited Page Editor

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.

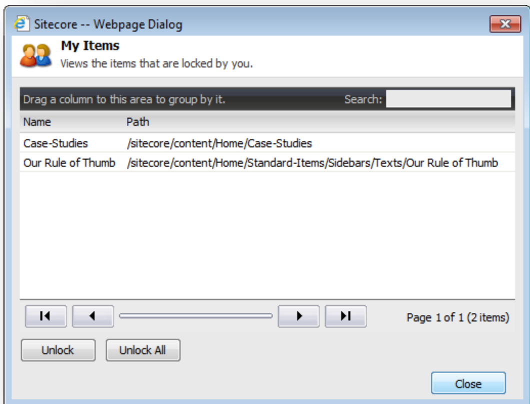
3.3 Unlocking Items in the Page Editor

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.



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

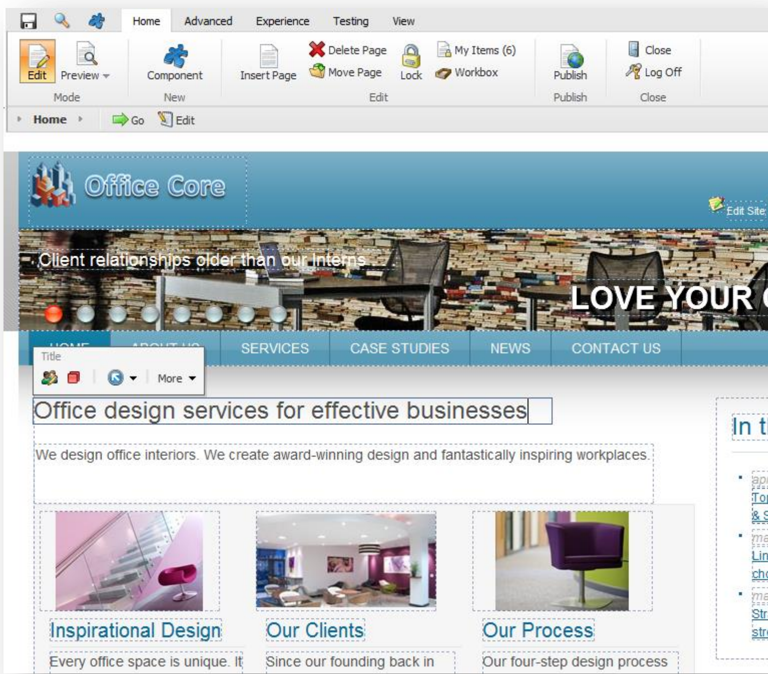
The Page Editor is designed for content authors who want to do their editing directly on the page.

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.

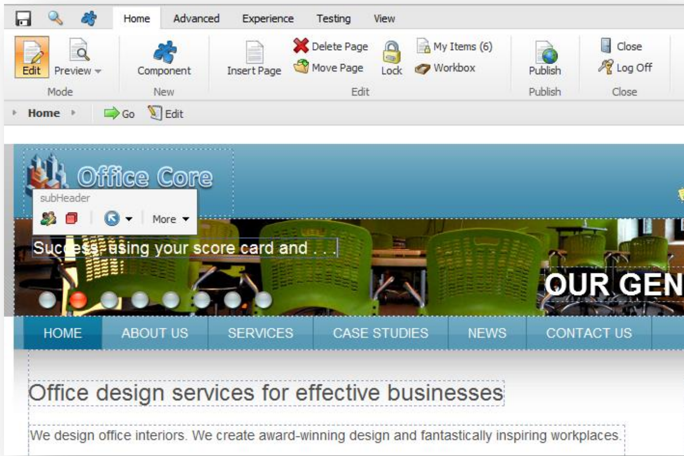


3.4.1 Editing a Simple Text Field

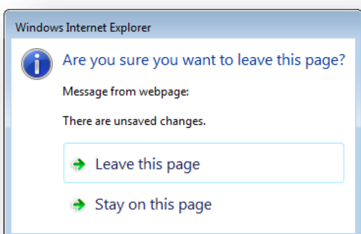
To edit a simple text field:

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:

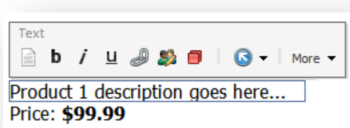


3.4.2 Editing a Rich Text Field Directly on the Page

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*.

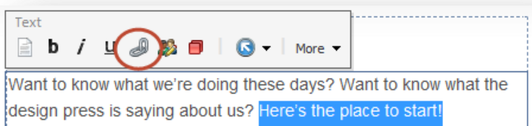
3. To edit the text directly on the page, just click the line that you want to edit and start typing.

   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.

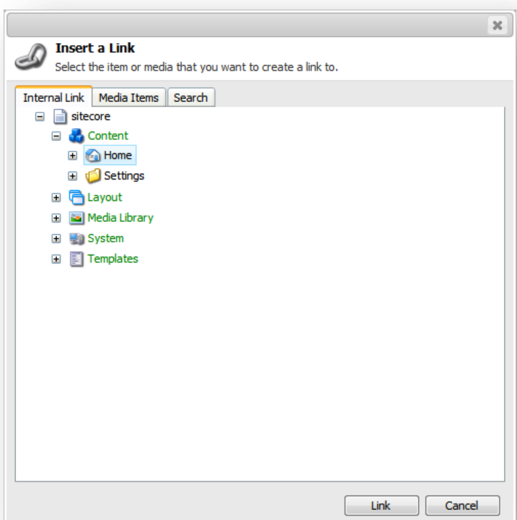
Inserting a Link

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.



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.
   - 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*.

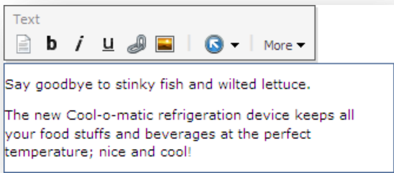
3. When you have found the item that you want to link to, click **Link**.

Inserting an Image

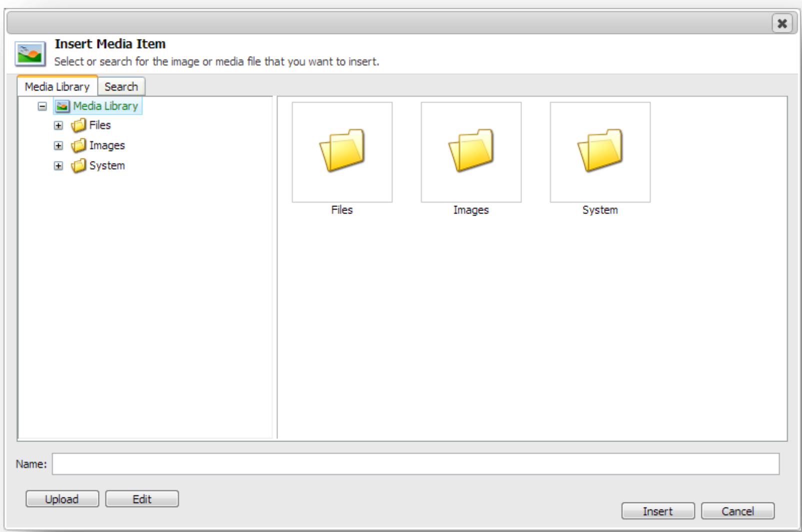
You can insert various types of media into the item. These could be animations, film clips, sound files, and so on.

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

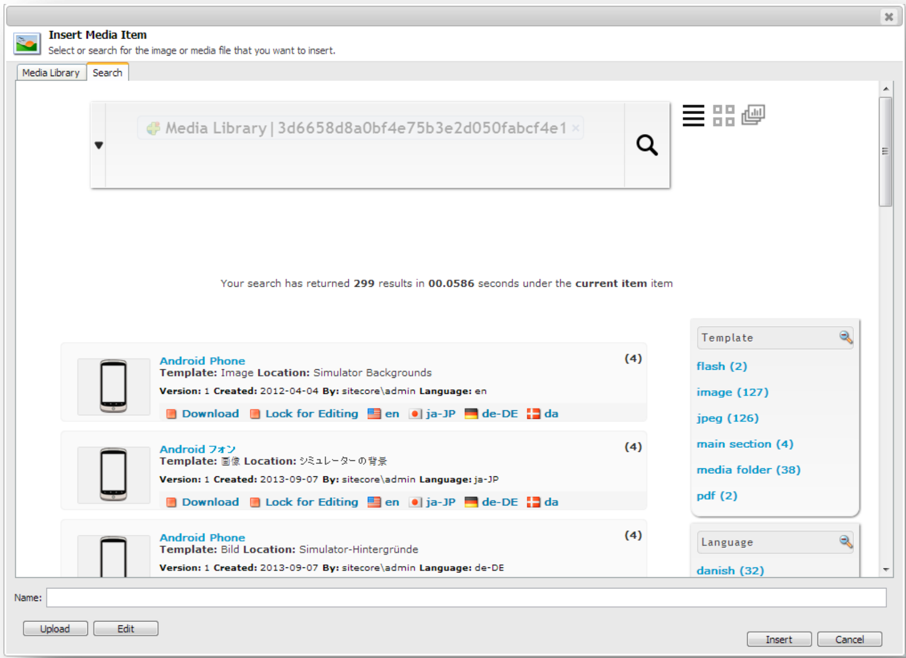
1. Click the **Insert Image** button.



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



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.



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

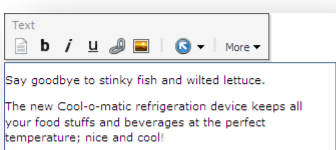
3. Click **Insert** to insert the image into the rich text field.

Uploading an Image or File

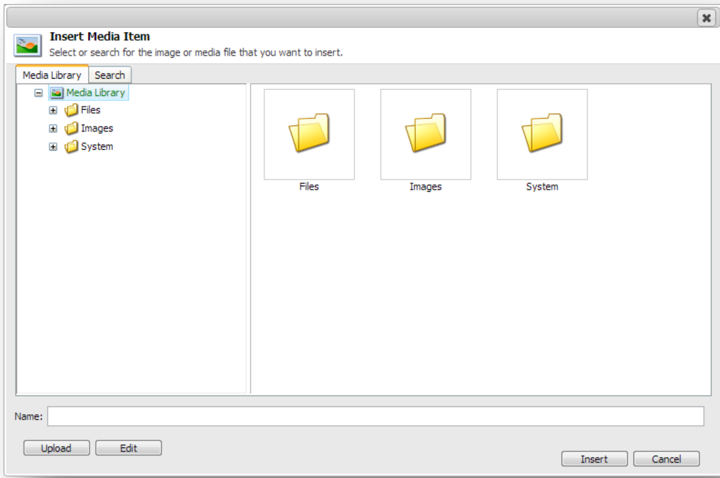
If the media file that you want to use is not available in the Media Library, you must upload it to the Media Library.

To upload an image or file to the Media Library:

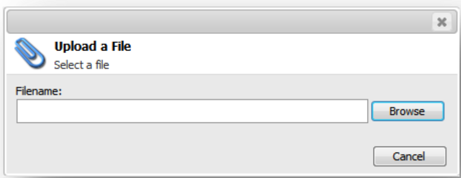
1. In the **Page Editor**, click the **Insert Image** button.



Sitecore opens the **Insert Media Item** dialog box.

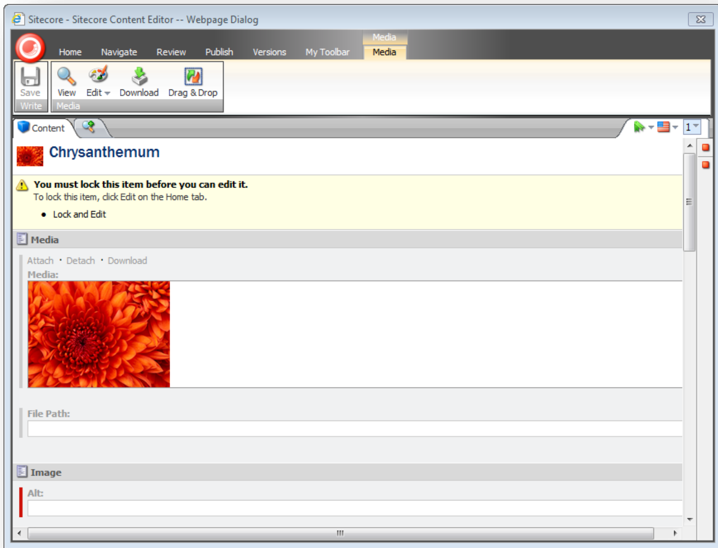


2. In the **Insert Media Item** dialog box, click **Upload** to open the **Upload a File** dialog box.

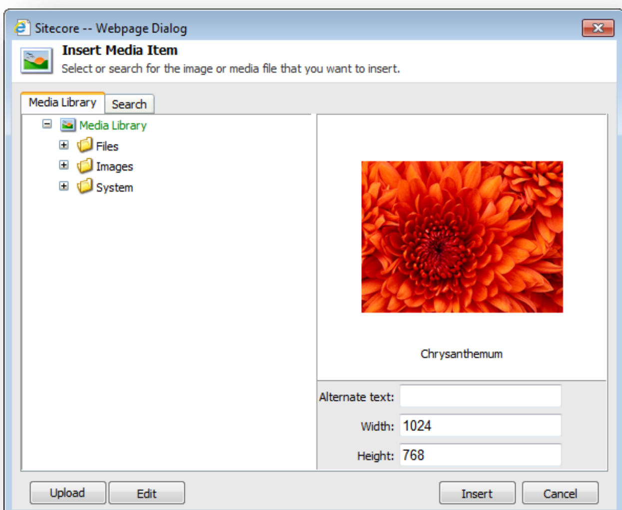


3. In the **Upload a File** dialog box, click **Browse** to locate the file that you want to use. Select the file and click **Open** to upload the item to the Media Library.

4. Sitecore opens the **Content Editor**, from where you *must* lock the item before you can edit the item and save it.



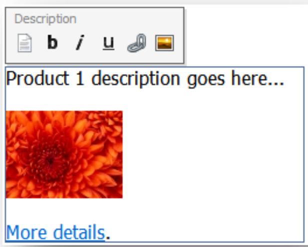
5. Exit the Content Editor to return to the **Insert Media Item** dialog box. Now you can choose the item that you just uploaded and click **Insert** to create a link to the new item. If you click **Cancel**, the **Insert Media Item** dialog box closes, but the new item remains available for later use.



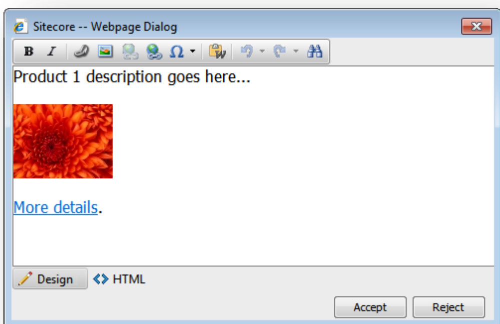
3.4.3 Editing a Rich Text Field in the Rich Text Editor

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** to open the text in the **Rich Text Editor**.



3. In the **Rich Text Editor** you can:
    - Insert and delete links to other parts of the website and to external websites.
    - Insert pictures or other media items.
    - 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

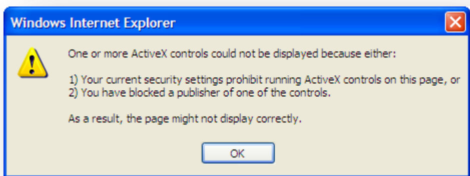
Sitecore also supports using Microsoft Word as a text editor. People who are familiar with Word may prefer using this tool to edit lengthy pieces of content. These Word fields are defined in the template by the developer who creates the website. Consequently, you only come across Word fields if a developer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

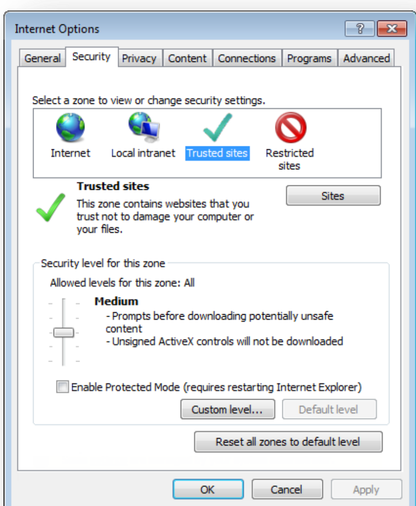
If you are using Internet Explorer 8, the first time you access a Word field in Sitecore, you will receive an error telling you that your security settings will not let you run ActiveX controls on the page.



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

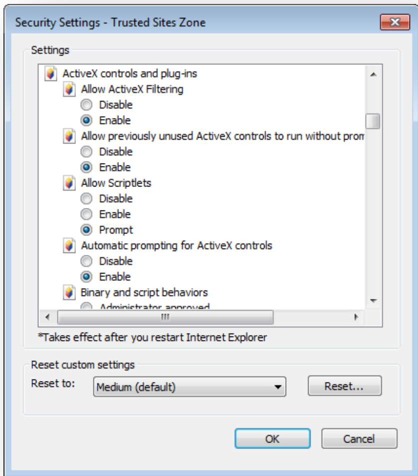
To configure Internet Explorer to support the Word fields:

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**.



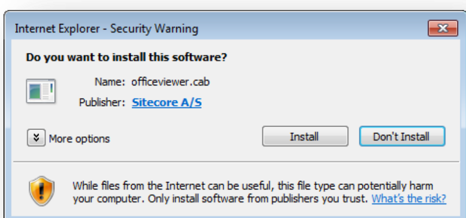
3. In the **Internet Options** dialog box, click the **Security** tab, and then click **Trusted Sites**.

4. In the **Security level for this zone** section, click **Custom** level, and the **Security Settings - Trusted Sites Zone** dialog box appears.



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.

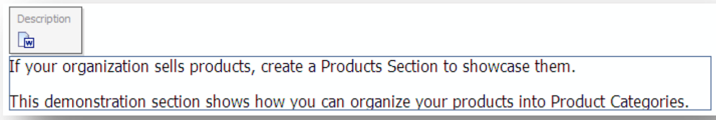
   When the component is installed, you can edit the field in Word.

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

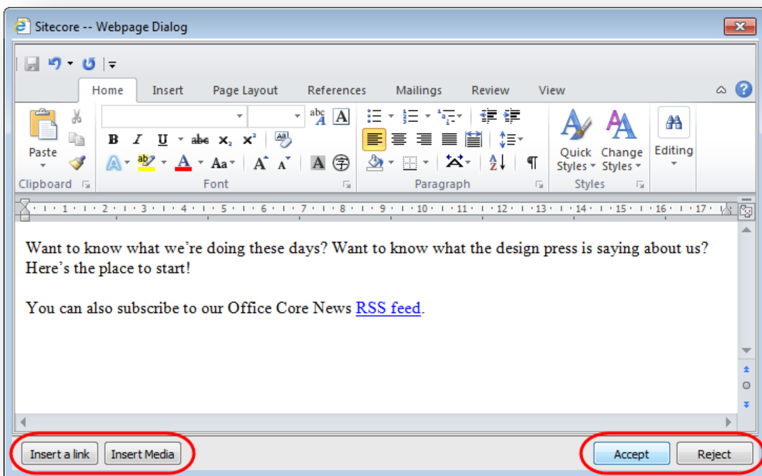
Editing a Word Field

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.



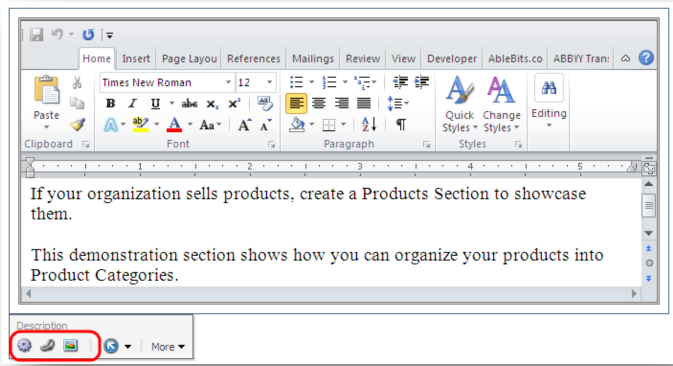
2. Click **Edit the** word **document** to open a new window that displays the content of this field in Word. You have access to all the functionality that Word contains.



- 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**.
- 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.



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**.

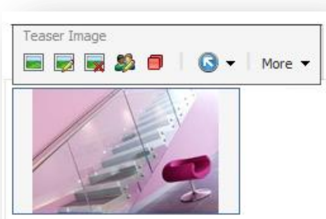
- **Insert Image**

  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.



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.

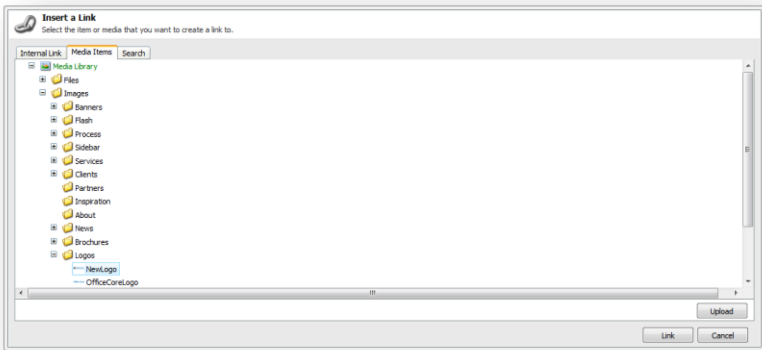
From either the Rich Text Editor or the Word Editor you can:

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

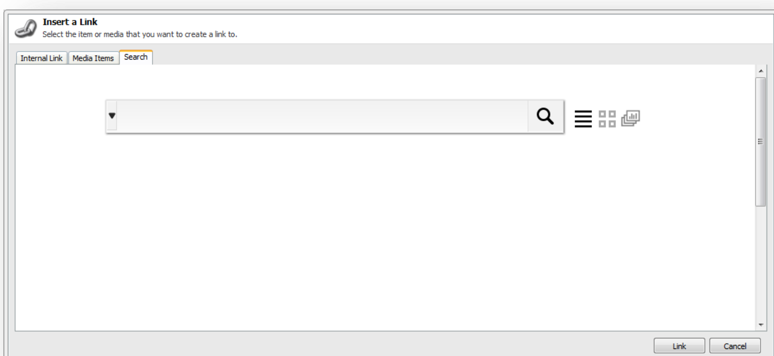
To change the link in an image:

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

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

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.
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.

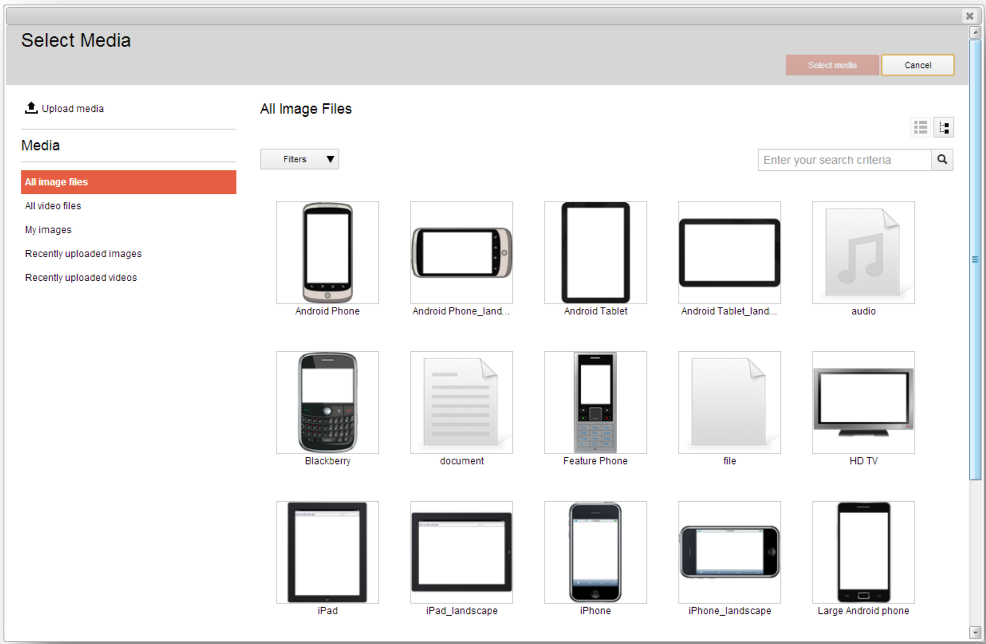
5. Click **Link**.

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.

2. Click the **Choose an Image** button 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.

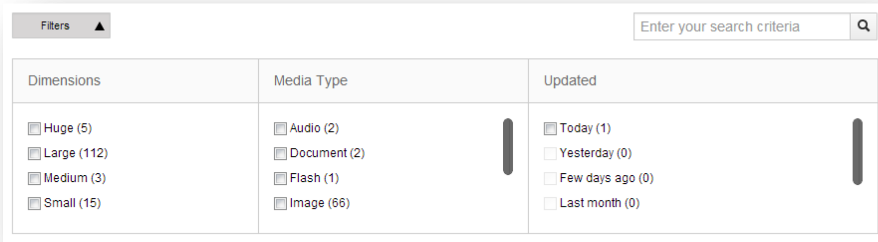


Note
The items are not listed in any particular order in the **Select Media** dialog box, so use the search functionality or the pre-defined lists from the menu to find a particular item.

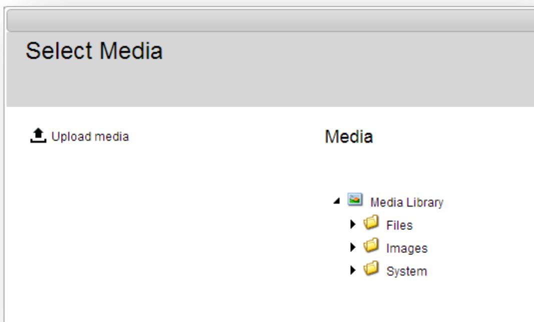
3. In the **Media** menu you can use the links to quickly get a complete list of:
   - All image files
   - All video files
   - My images – this lists all the image files that have been updated by the current user.
   - Recently uploaded images
   - Recently uploaded videos

4. To filter the displayed media items according to the images' metadata, click the **Filter** drop-down button and select the appropriate filters. The number in parenthesis indicates how many items are

available for the filter.



5. If you want to search for a specific item, enter a search word in the **Search** field.
6. Click **Upload media** to upload a new media item to the library.
7. 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



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

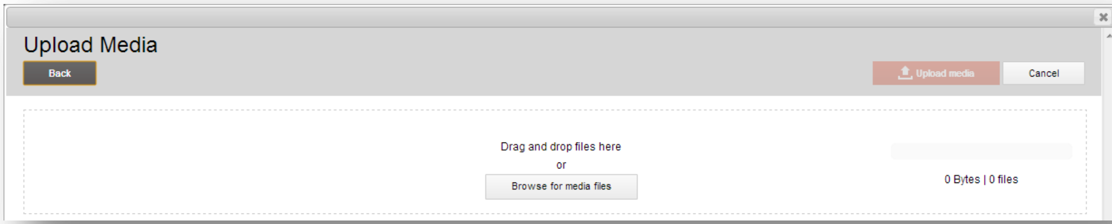
Uploading an Image

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 Upload media to upload a new media item to the library.



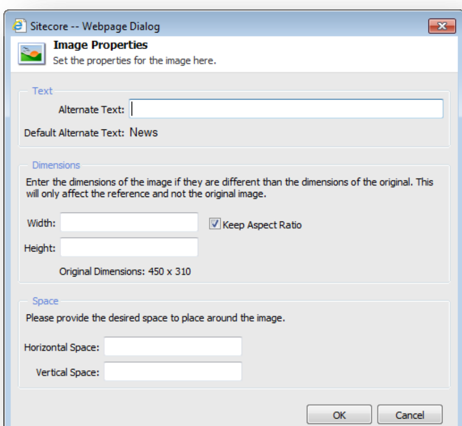
3. To add the new media items to the **Upload Media** dialog box, you can:
   - Click **Browse for media files** to navigate to the image that you want to add to the Media Library.
   - Drag and drop the images directly into the **Upload Media** dialog box.
4. Add as many media items to the **Upload 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.

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.

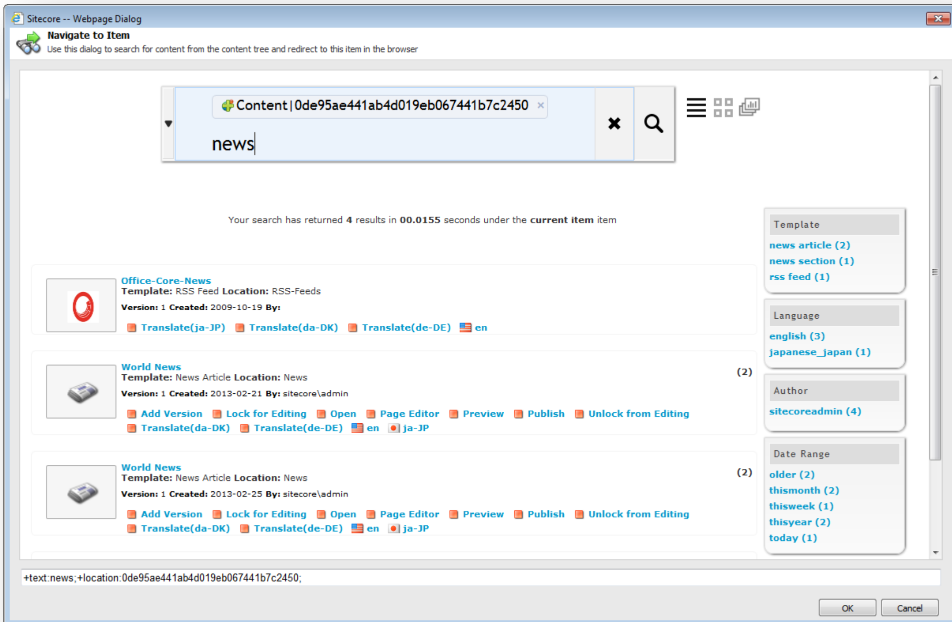


3. In the **Alternate Text** field, enter the text to be displayed when you move the mouse over the image.
4. In the **Dimensions** section, specify the dimensions that the image should be displayed in — if they differ from the actual size of the image.

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.



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 the page looks in different language versions and how the page is displayed for different devices.

1. In the **Page Editor**, in the **Mode** group, click **Preview**.
2. On the **Experience** tab, select 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

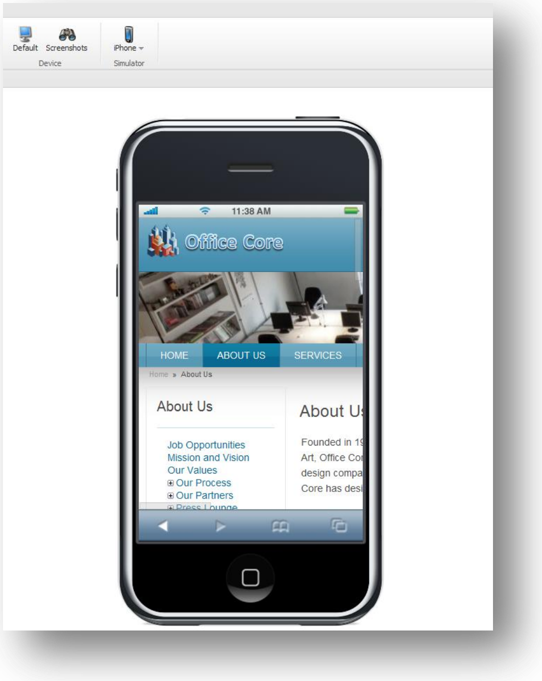
The Device Simulator enables you to preview your website in a simulation of several different devices, such as an *iPhone*, *iPad*, *Android Phone,* and *Blackberry*.

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.

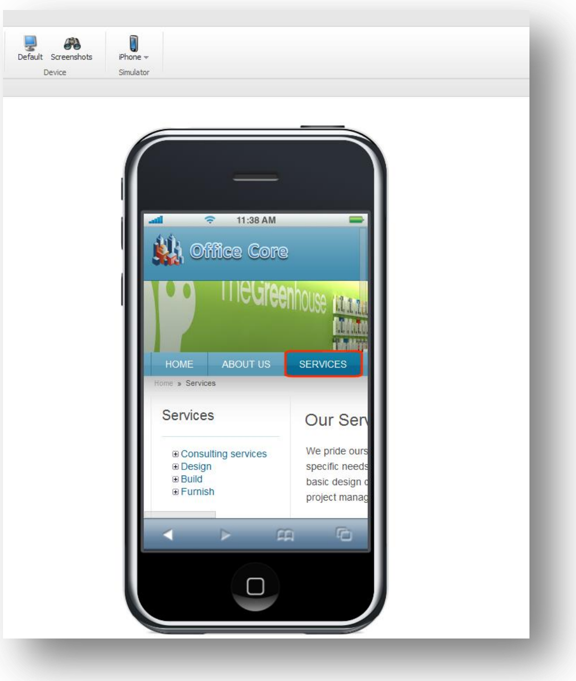
To preview a page in the **Device Simulator**:

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.

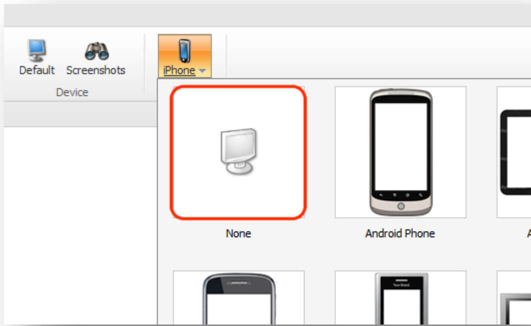


In the **Device Simulator** you can:

- 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

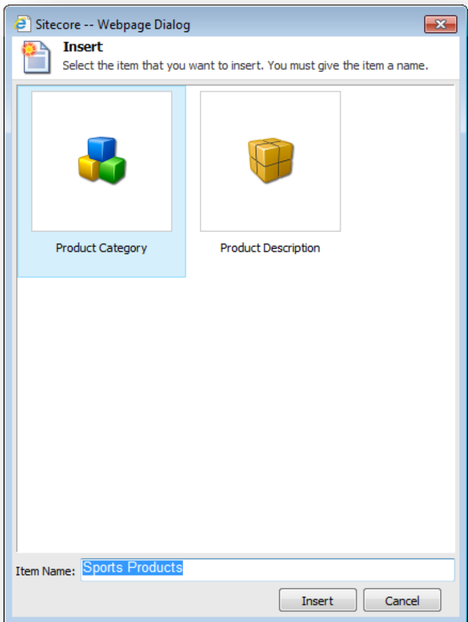
As a content author, you can create new content items and insert them into the web page where you want them displayed.

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:

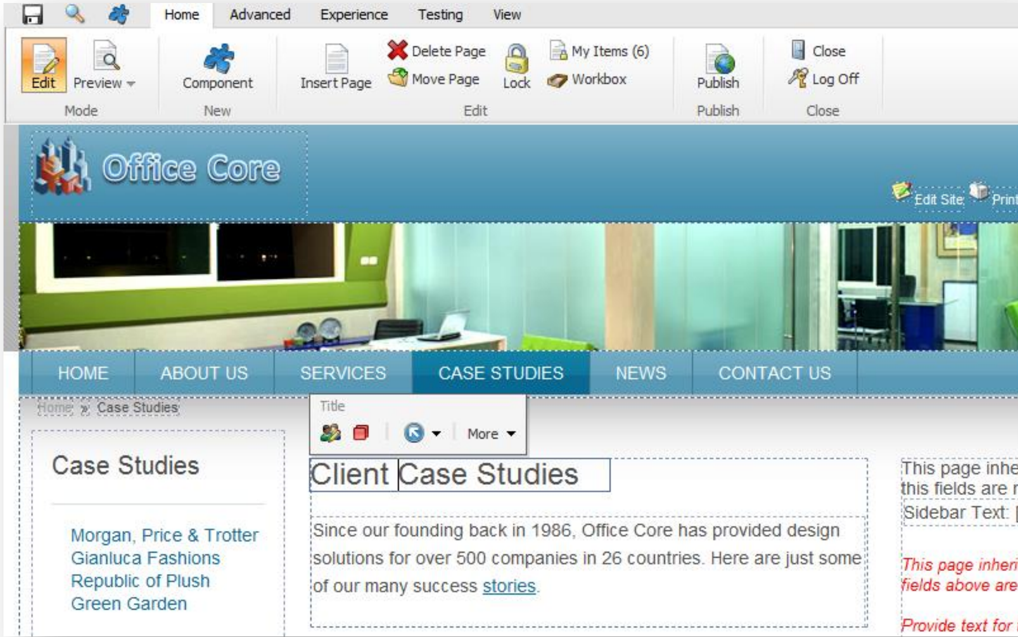
1. Navigate to the page that you want to edit.
2. Click the **Edit** button at the top of the page.
3. On the ribbon, click **Insert Page** to open the **Insert Page** dialog box.



   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.

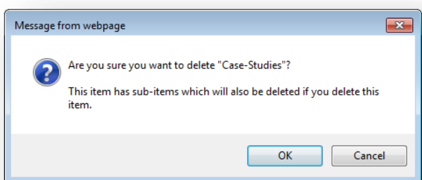
   If you want to delete an item, navigate to that item.

   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.



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.

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

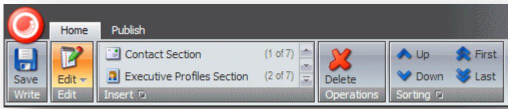
4.1 The Content Editor

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

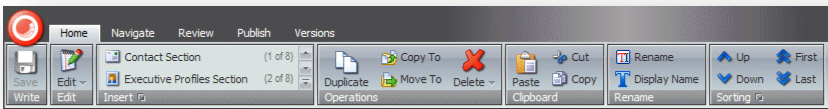
The Content Editor is a large application but its appearance and the functionality that it contains varies depending on the roles that have been assigned to the user, the local security settings, and the amount of customizations that have been carried out on your installation.

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

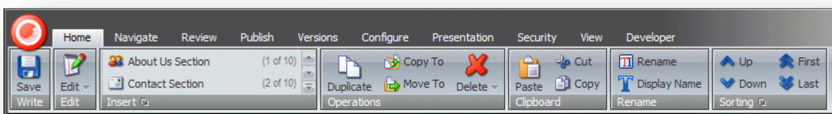
The functionality that you have access to in the Content Editor can vary greatly. As a minimum you can expect to see:



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



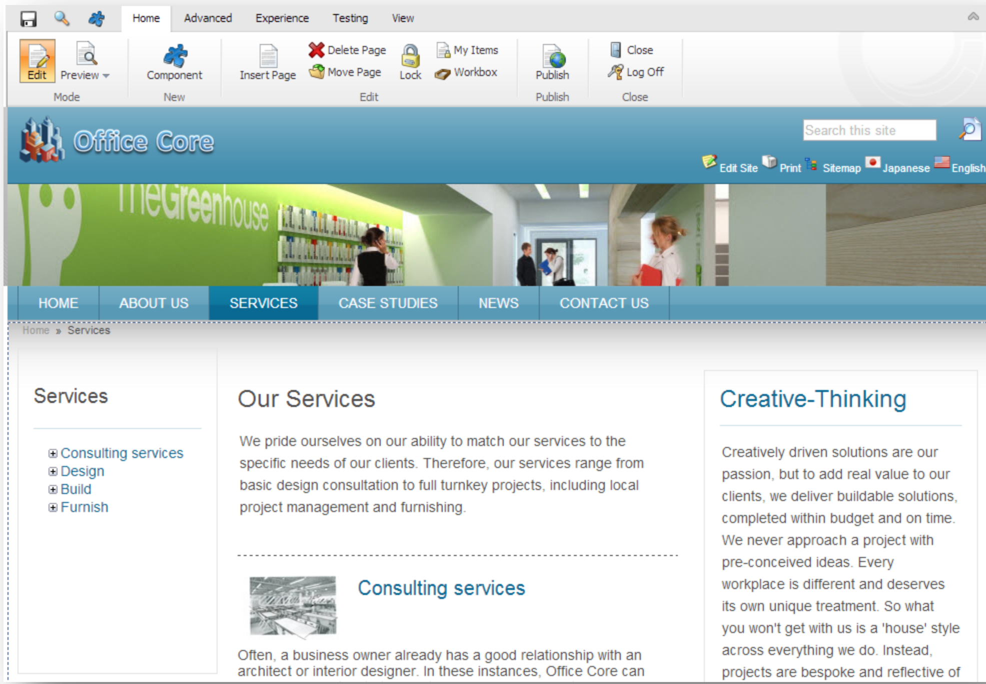
If you have complete access to the Content Editor, it will look something like this:



4.1.1 The Page Editor vs. the Content Editor

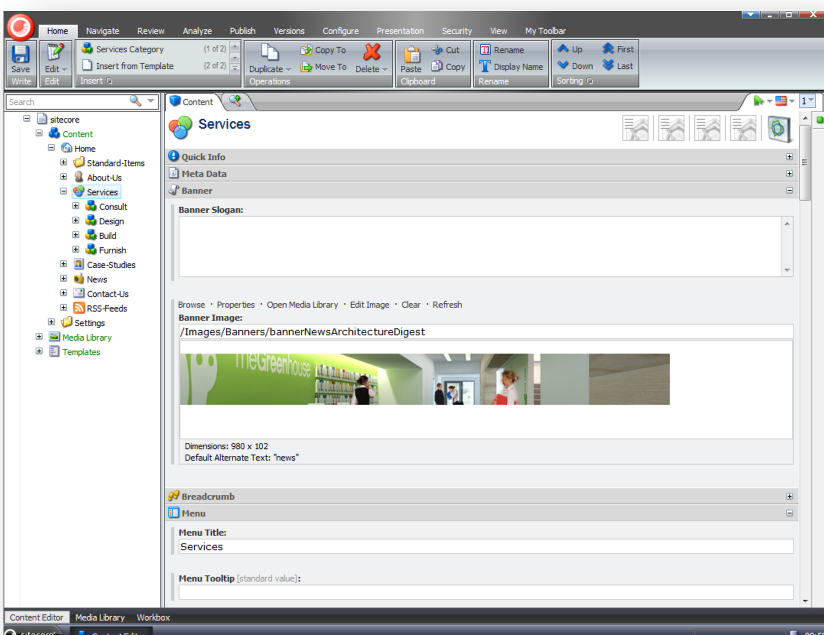
When you log in to the Content Editor, the items that make up your website are presented to you in a very different way than they are in the Page Editor. In the Page Editor, you see the items as they are presented on the website. In the Content Editor, you see the items as objects in the content tree 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.

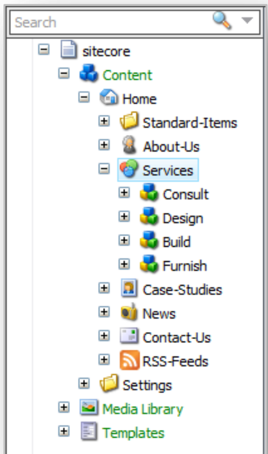
When you open the *Services* section in the Content Editor, it looks like this:



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 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.



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.

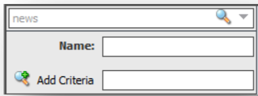
3. Click **Search** or press ENTER to perform the search.

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.

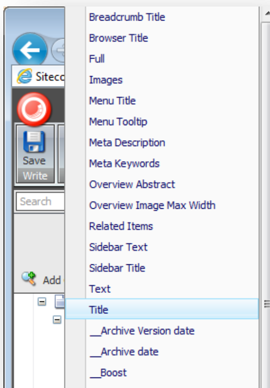
To add a criterion to your search:

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

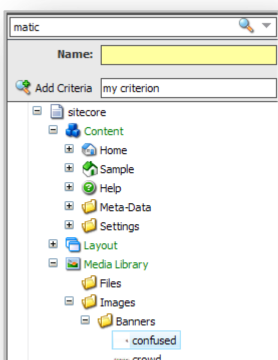


2. In the **Name** field, enter the name of the item you want to search for.

   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.



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.



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.

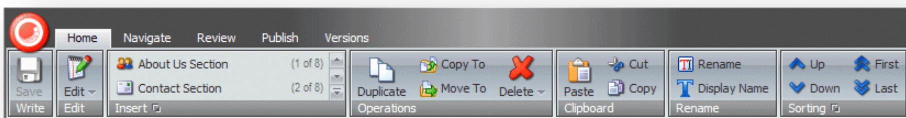
4.1.4 Locking in the Content Editor

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.

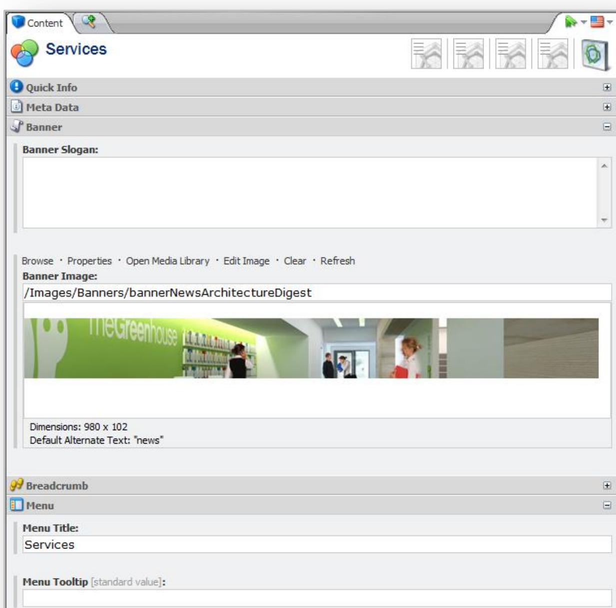
Locking an Item

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.

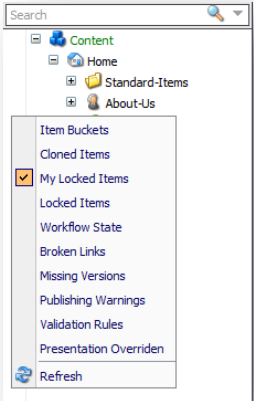


When you lock the item, the functions and commands that are available to you are activated in the **Content** pane.



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 select **My**

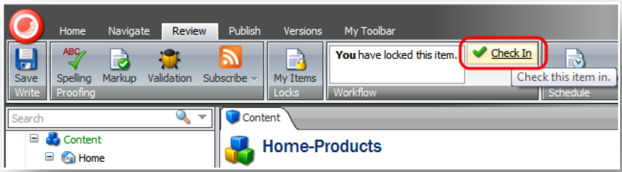
Locked Items in the floating menu.



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.



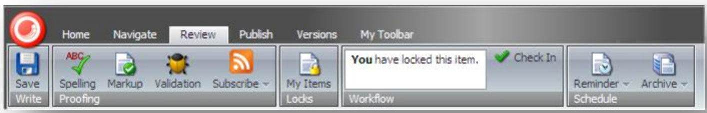
Unlocking Multiple Items

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.

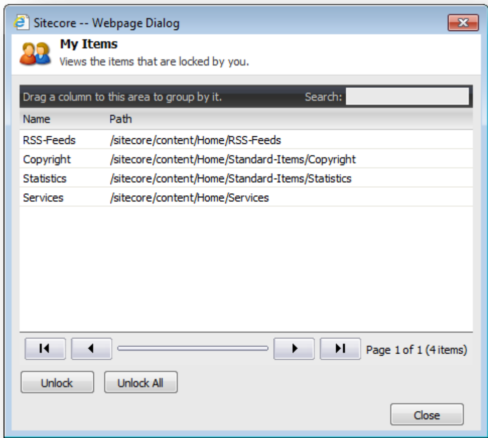
Sitecore keeps track of all the items that are locked to ensure that nobody else can edit them. It also keeps track of all the items that have been locked by each individual user.

To unlock the items you have locked:

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



2. In the **Locks** group, click **My Items**.



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.

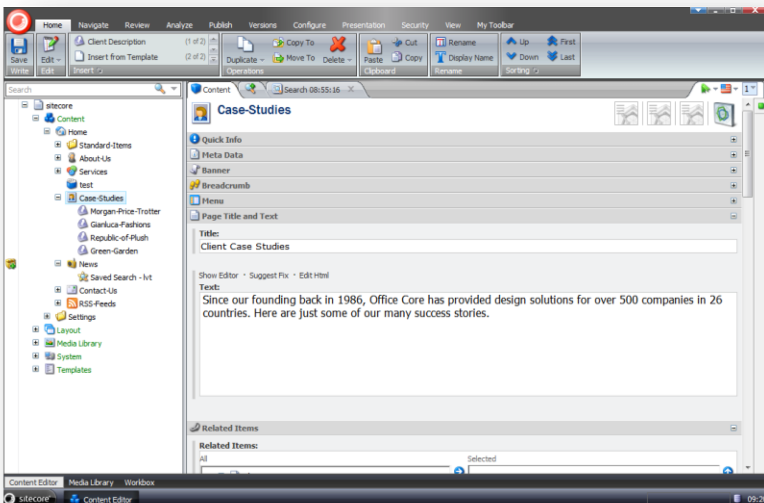
In all the procedures and tasks described in this chapter, it is assumed that you have already locked the item.

4.2.1 Editing a Rich Text Field in the Content Editor

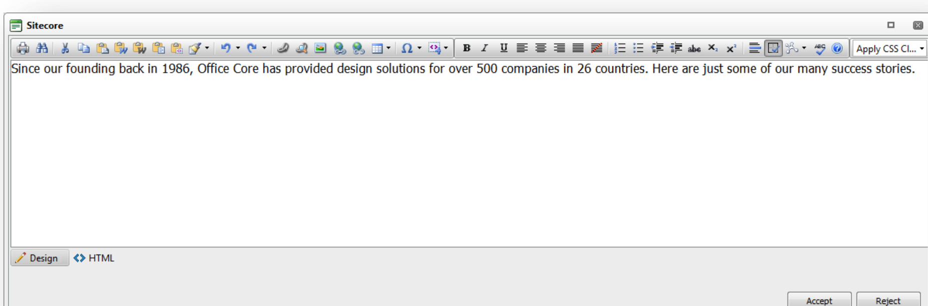
After you have selected an item in the content tree, you can edit it.

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.
- Insert pictures or other media items.
- 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.

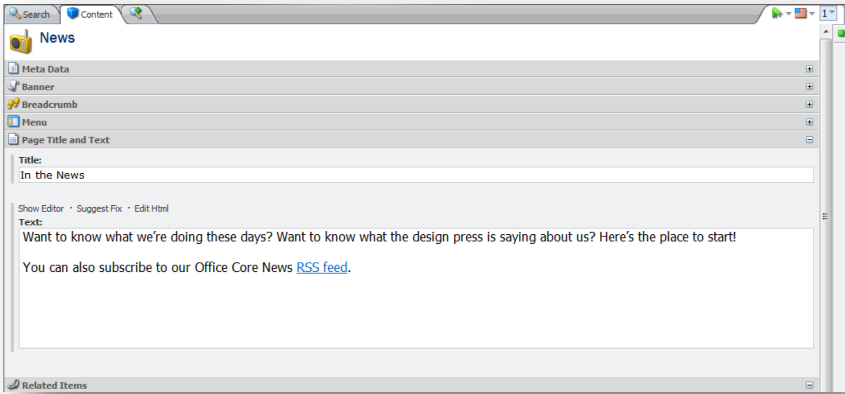
Sitecore Word fields are only supported on Internet Explorer 7 or later.

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.

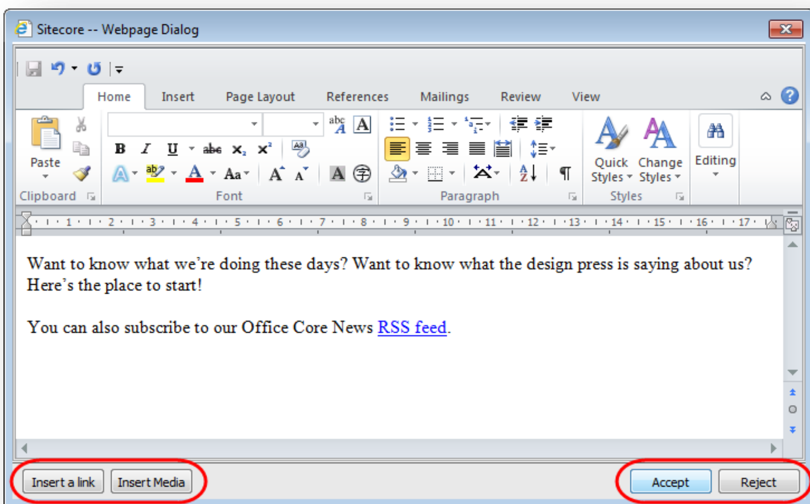
For more information about how to configure Internet Explorer 8 to run this ActiveX control, see the section, *Configuring Word Fields*.

To edit a Word field:

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



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**.
5. 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**.

6. 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.

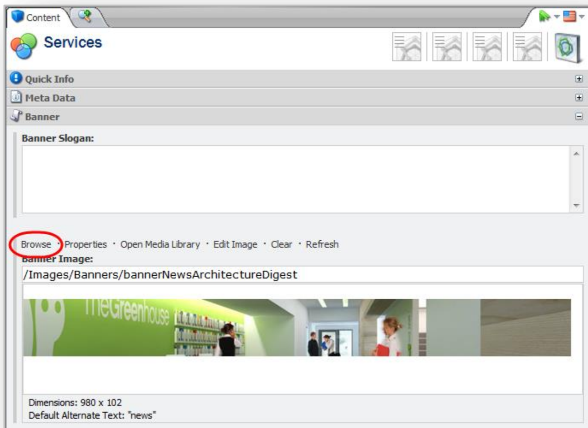
4.2.3 Working with Graphics

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

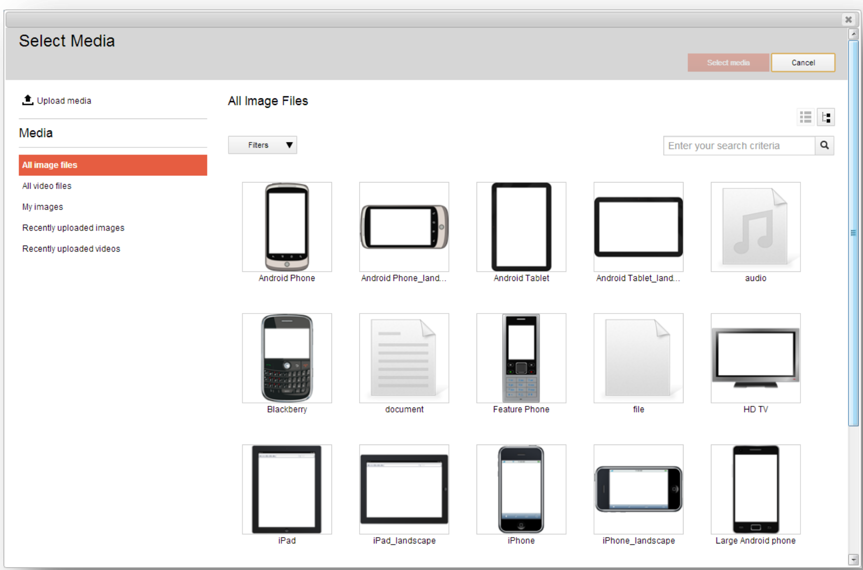
Changing an Image in the Image Field

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.

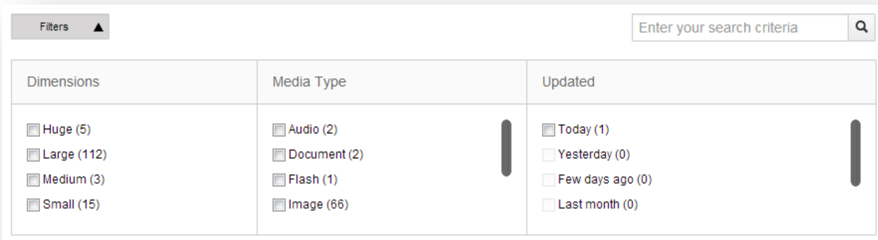


2. In the **Content** pane, click **Browse** to open the **Select Media** dialog box. The **Select Media** dialog box opens and displays all the items from the Media Library that is available for the image field you have chosen.

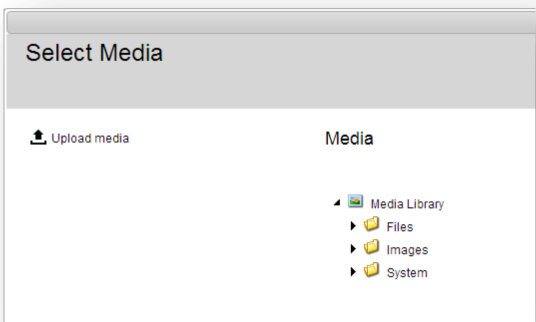


Note
The items are not listed in any particular order in the Select Media dialog box, so use the search functionality or the pre-defined lists from the menu to find a particular item.

3. In the **Media** menu you can use the links to quickly get a complete list of:
    - All image files
    - All video files
    - 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 button and select the required filters. The number in parenthesis indicates how many items are available for the filter.



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



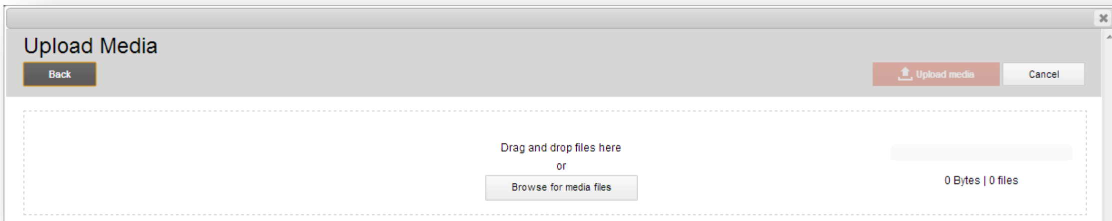
7. Select the image that you want to use, click **Select Media,** and the new image is inserted into the image field.

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 **Upload media** to upload a new media item to the library.



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.

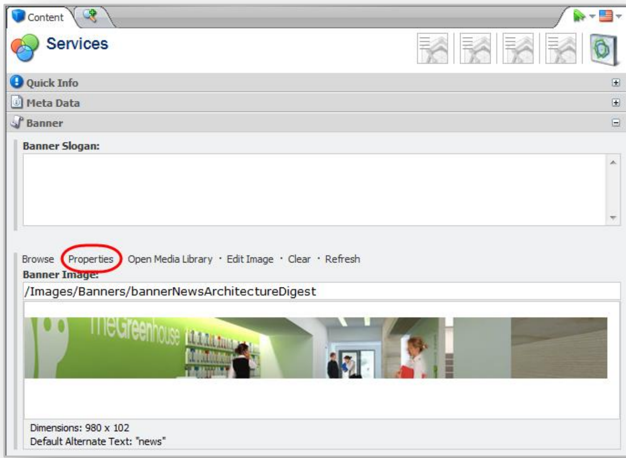
The image is now uploaded to the Media Library and you can use it on your website.

Editing the Properties of an Image

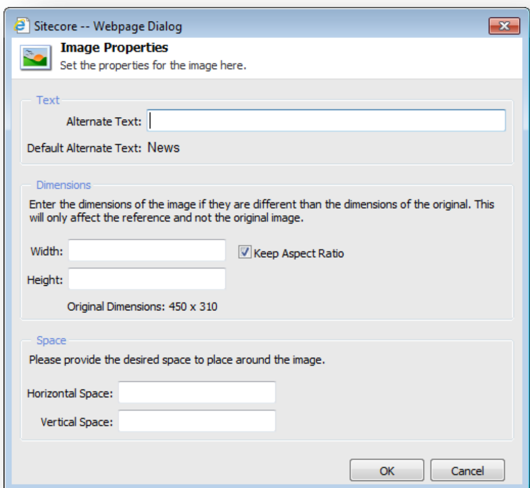
After you have added an image to an item in the Content Editor, you can edit the properties of the image.

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.



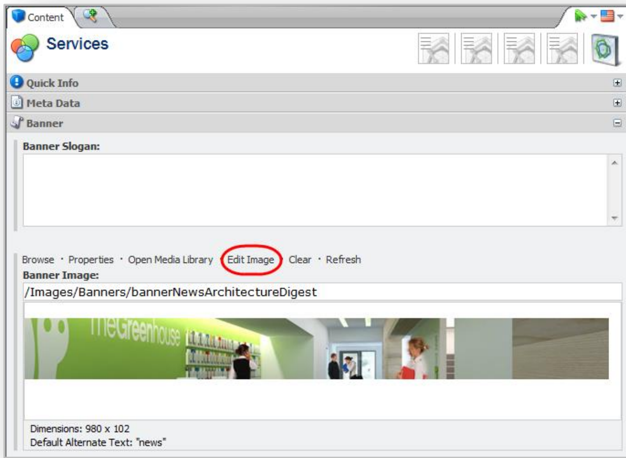
3. In the **Alternate Text** field, enter the text that you want to appear in the tooltip for this image
4. In the **Dimensions** section, specify the dimensions that the image should be displayed in — if they differ from the actual size of the image.
5. In the **Space** section, specify how much space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

Editing an Image

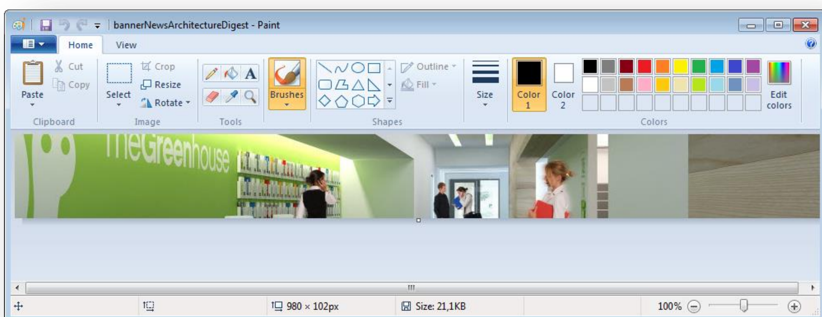
You can use Sitecore to edit the image if you need to.

To edit an image:

1. Scroll to the field that contains the image.



2. Click **Edit Image** to open the image. If you use Windows XP, Sitecore opens the built-in **Image Editor**. In the built-in Image Editor, you can crop, resize, flip, and rotate the image.



If you use Windows 7 or Windows Vista, Sitecore opens the image using the default image editor on your computer. You edit and save the image and then close the editor.

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

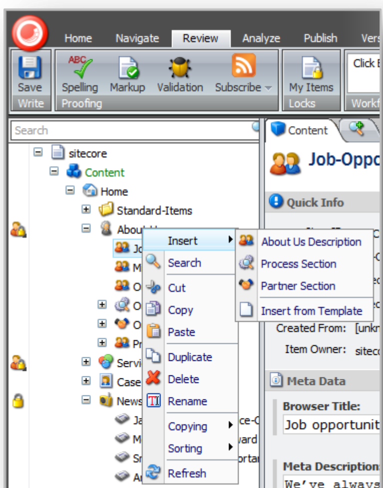
There are several ways to create new items in the Content Editor.

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

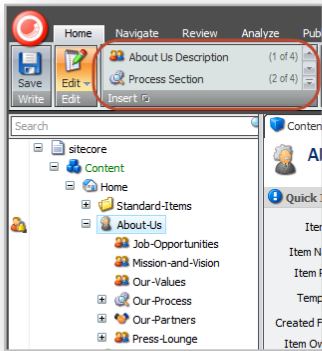
You can easily create a new item as a subitem of the current item.

Inserting a Subitem

To insert a new subitem:

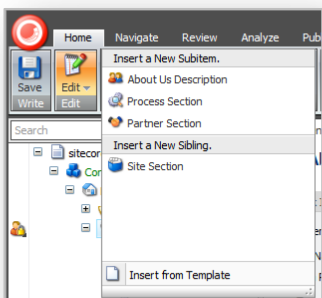
1. In the **Content Editor**, locate the item for which you want to create a new subitem.

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 and select the subitem from the list that appears.

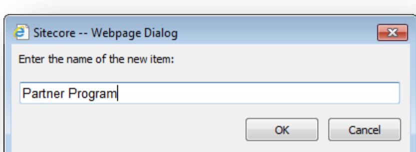


4. In this drop down list, you can select a subitem or a sibling. A sibling is an item on the same level as the current item.

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

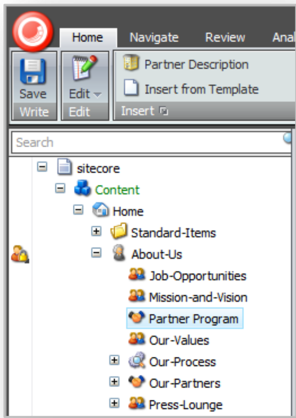
   In this example, we add a new product category to the list. This new category is a subitem of an item and can contain its own subitems.

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



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:

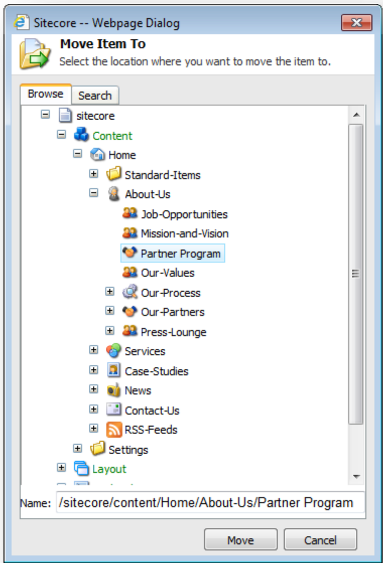
1. In the content tree, locate the item that you want to duplicate.
2. On the **Home** tab, in the **Operations** group, click **Duplicate** and a dialog box appears prompting you to name the new item.
3. Enter a name for the new item and it is added to the content tree.
   The duplicated item is added 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*.

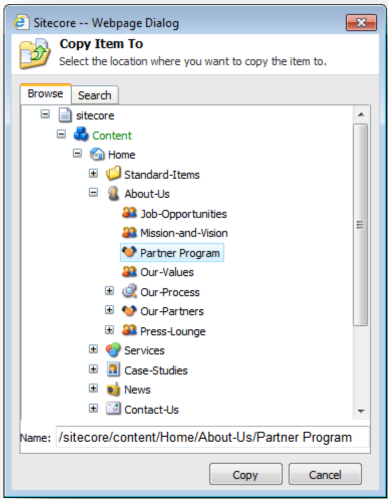
4.3.3 Copying an Item to another Location

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

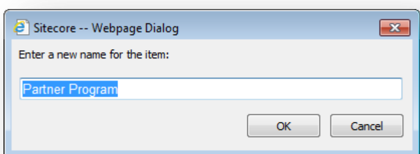
To copy an item to another location:

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.



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

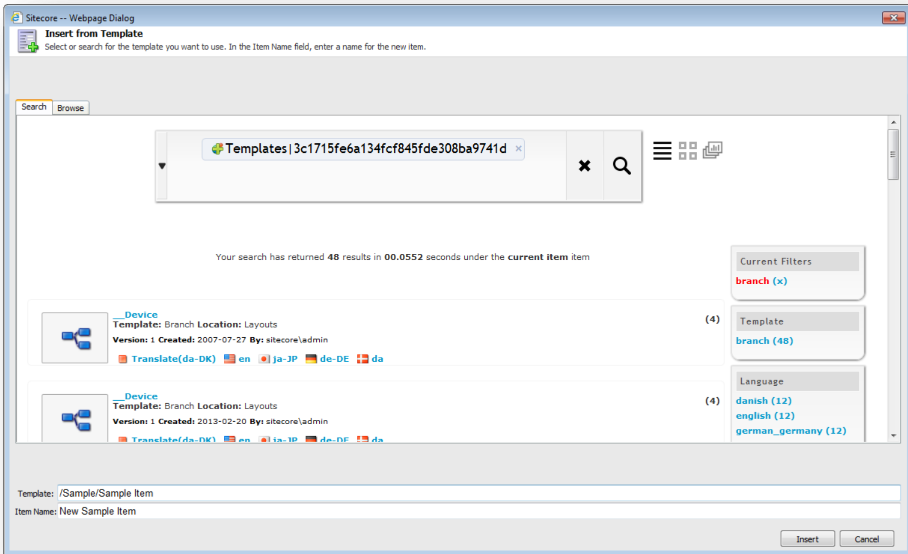
If you have been given sufficient access rights, you can also create an item based on a template. You can create a new item based on *any* template.

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**.

   The **Insert From Template** dialog box opens. The **Search** tab already contains a list of all the available templates.



   You can either search for the template you want to base the item on, or click the **Browse** tab and navigate to the item in the content tree.

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

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

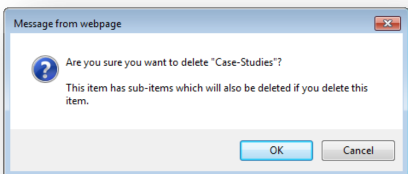
To delete an item from the website:

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.

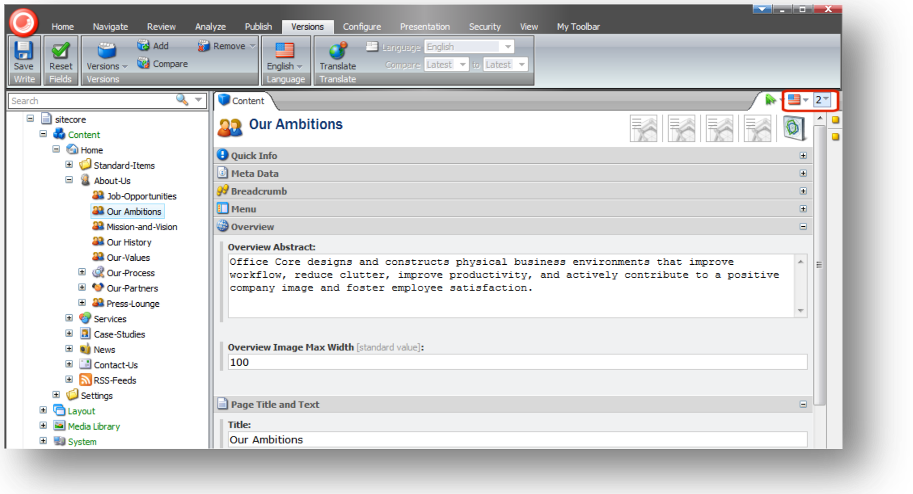
   If you want to save any of the subitems, click **Cancel** and then move the subitems to another part of the website before you delete the parent item.
3. Click **OK** to delete the item and its subitems.

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 and select the language version that you want to delete.
3. Click the **Versions** button 2 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

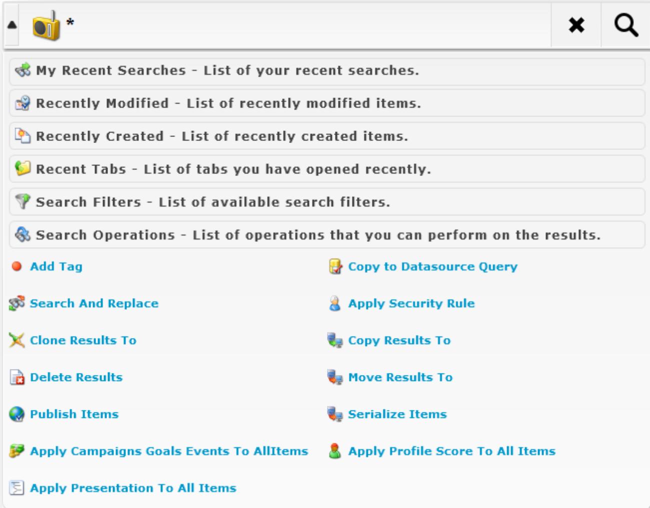
If you want to delete multiple items from Sitecore, it is recommended that you use the Sitecore search interface. On the **Search** tab, you can search for the items that you would like to delete.

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 button.



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**.

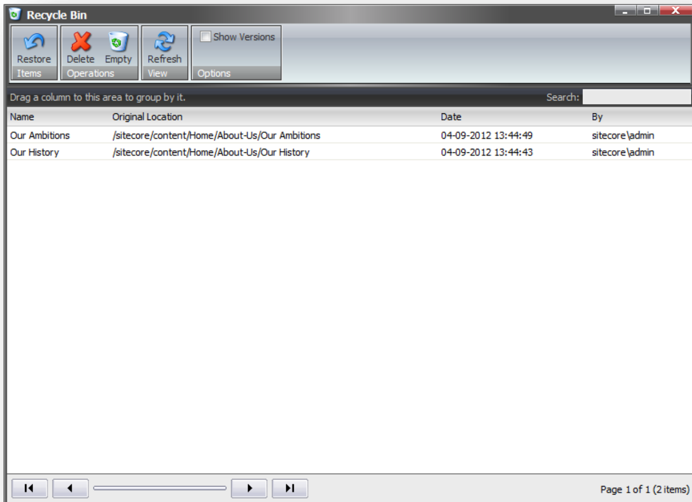
To delete individual content items, open the **Recycle Bin**, select the item that you want to delete and in the **Operations** group, click **Delete**.

4.4.5 Restoring a Version of an Item

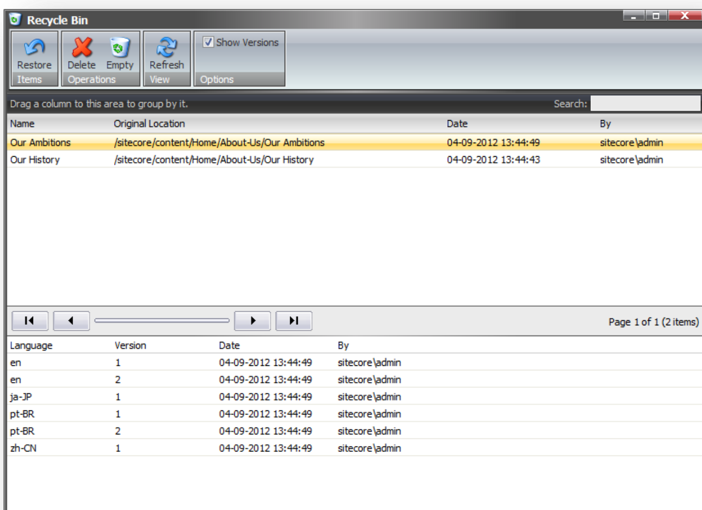
After you have deleted an item, you can also restore the entire item or some individual versions of the item.

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**.



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.



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.

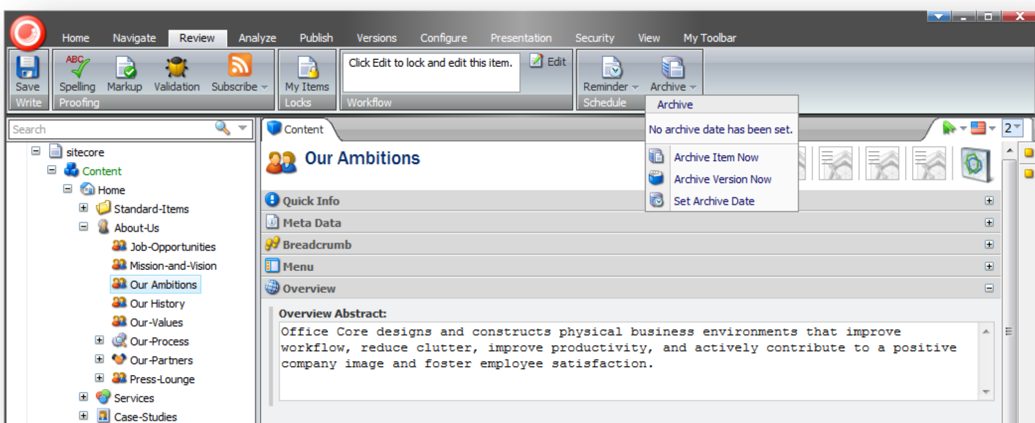
When you archive a content item, it is removed from the content tree, but it remains on the published website. Therefore you must republish the website to ensure that these changes are replicated on the website.

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.

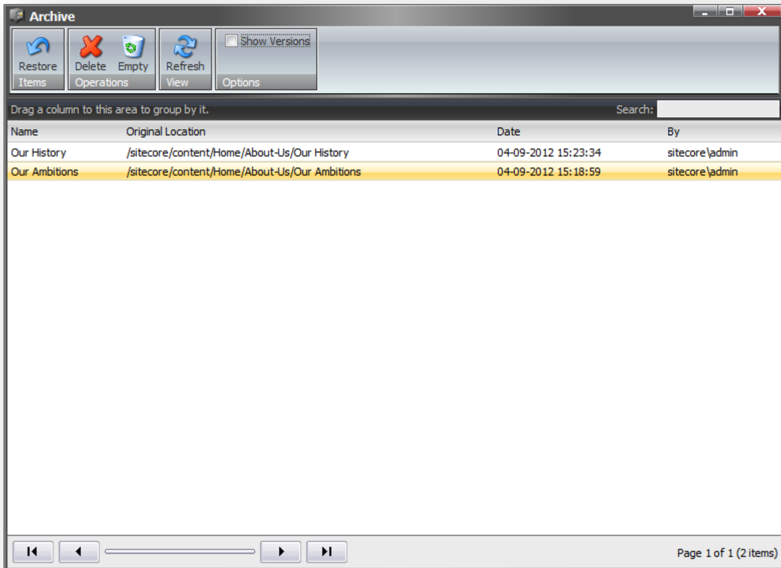


2. On the **Review** tab, in the **Schedule** group, click **Archive** and then click **Archive Item Now**.

   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**.



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.

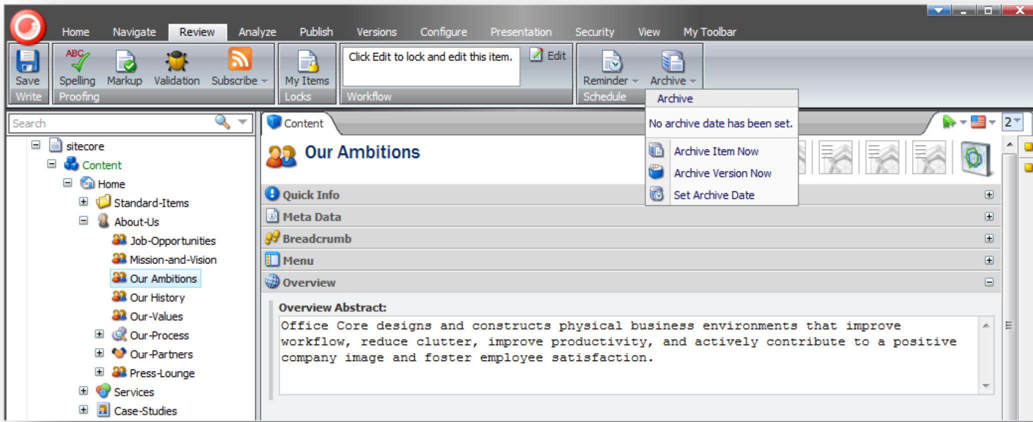
4.5.2 Archiving and Restoring a Version of a Content Item

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 if you want to archive a version in a particular language.

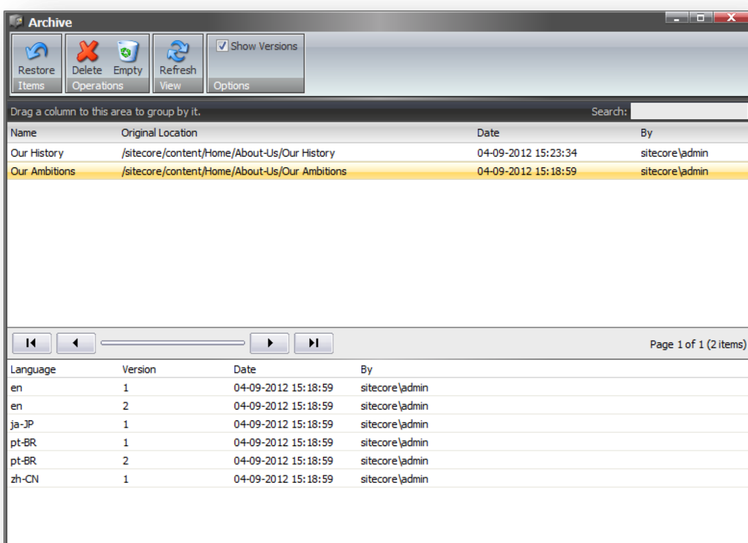
3. Click the **Version** button  and select the version that you want to archive.



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.



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.

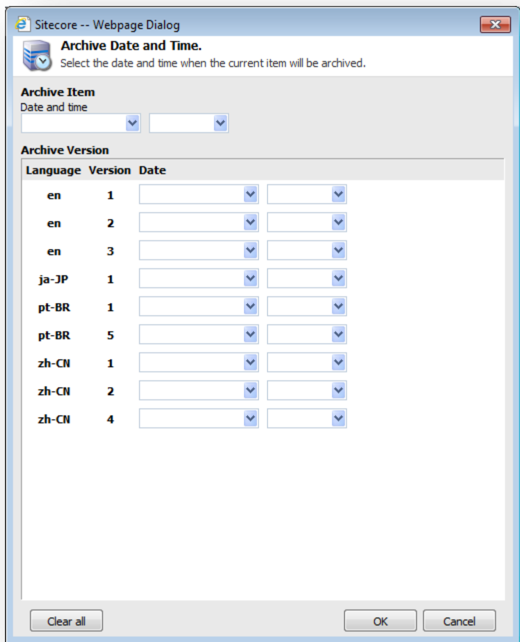
   You can select and restore as many versions of the same item as you want. However, you can only select one item and restore versions of that one item at a time.

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**.



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:

   - If you only specify a date, the item is archived at 12:00 midnight on that date.
   - 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.

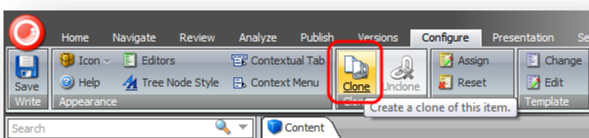
This section describes how to use the item cloning functionality. In this document, the item that is being cloned is called the *original item*.

4.6.1 Creating a Clone of an Item

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

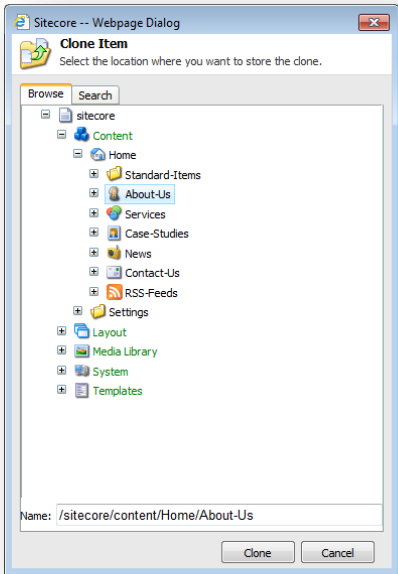
To create a clone of an item:

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



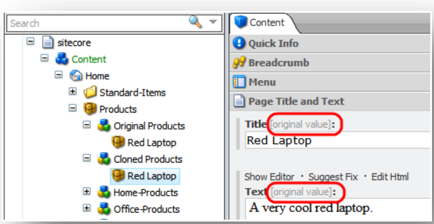
3. In the **Clone Item** dialog box, select the location where you want to store the clone. You can navigate to the location in the content tree on the **Browse** tab or search for the location on the

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.



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*.

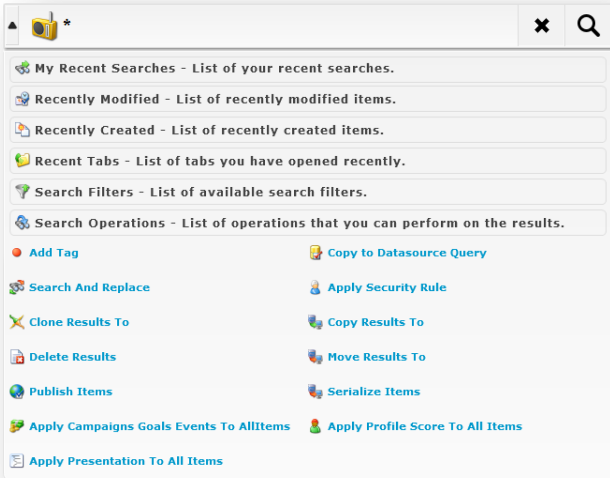
Cloning multiple items

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.

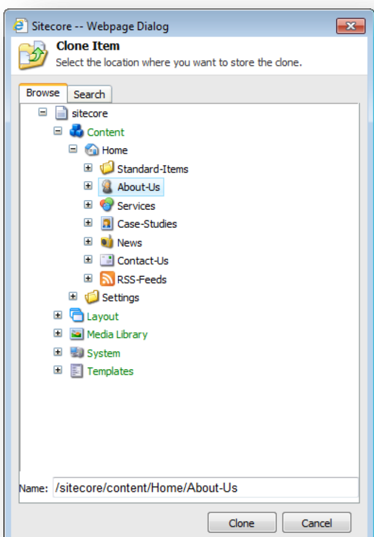
To clone multiple items using the search operations:

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**.



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.



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

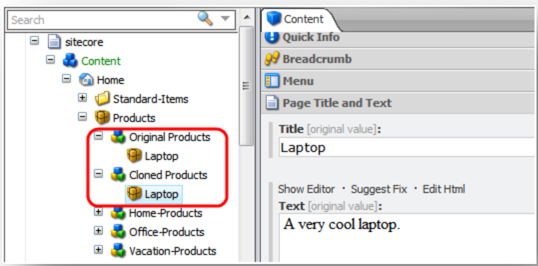
For more information about using the Sitecore search functionality and how to clone multiple items, see the section *Searching in Sitecore.*

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.

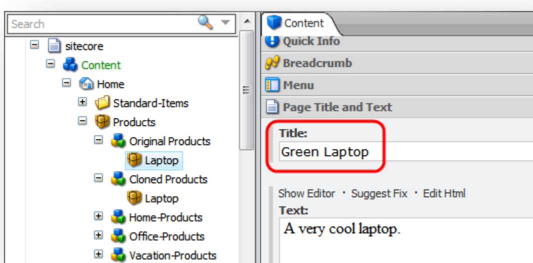
This section describes some common use cases that demonstrate how clones and original items interact.

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

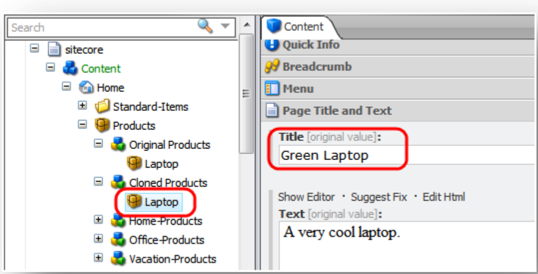


Now let's see how cloning works.

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

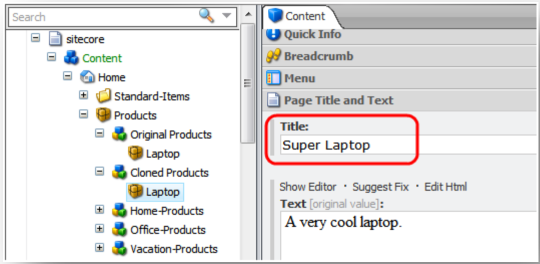


Sitecore updates this field in all the clones of this item.



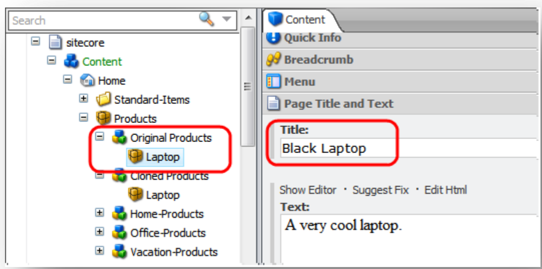
Notice the *[original value]* text on the right side of the field title.

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

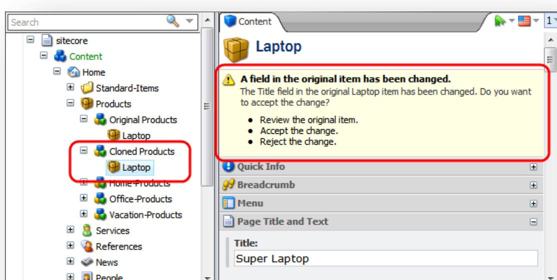


The original item has not changed.

3. Edit the same field in the original item.



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.



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**

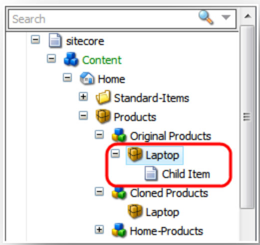
  Sitecore keeps the existing field value in the clone item and hides the message.

4.6.3 Cloning and Child Items

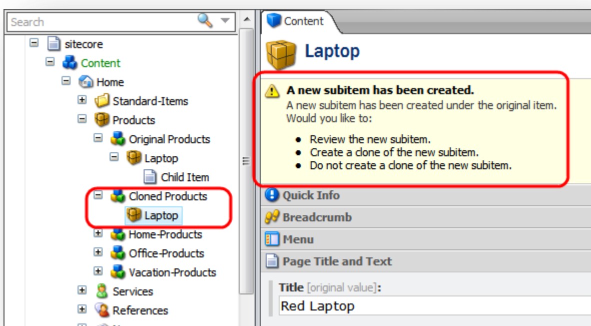
If you create child items under the original item, Sitecore helps you decide whether or not you want to create clones of these subitems.

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.



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.

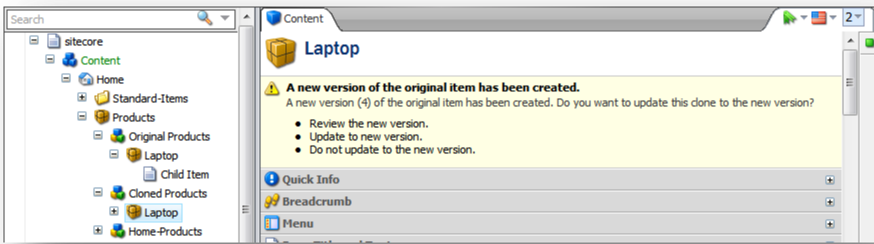
If you select the clone and add a new version, the new version is connected to the same version of the original item as the previous version of the clone.

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



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.

- **Do not update to the new version**

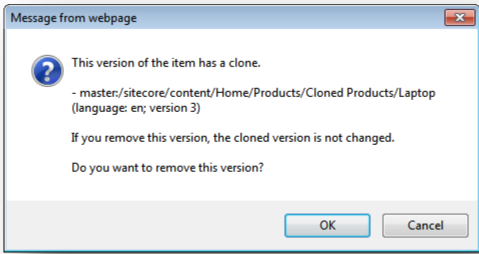
  If you click this option, Sitecore does not copy the new version and hides the message.

Removing a Version of the Original Item

This section describes what happens if 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**.

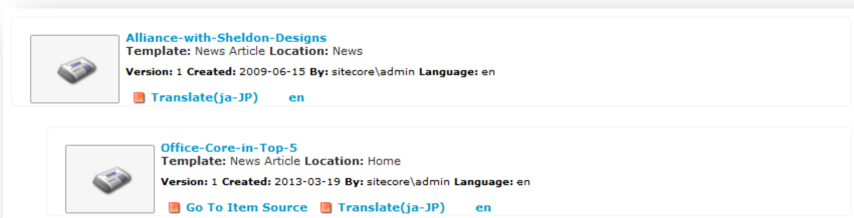
Sitecore displays the message telling you that this version of the item has a clone.



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.



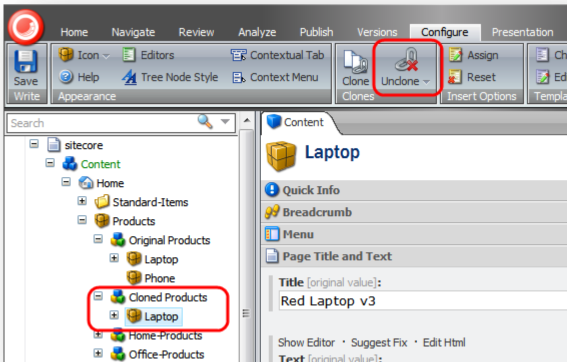
4.6.5 Uncloning an Item

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.

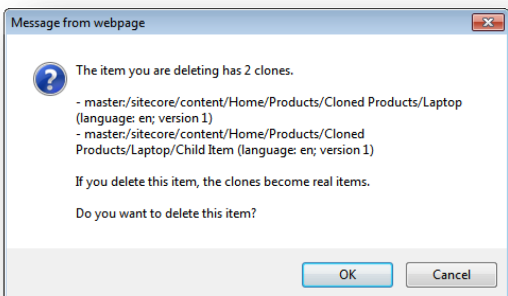
2. On the **Configure** tab, in the **Clones** group, click **Unclone**.



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.

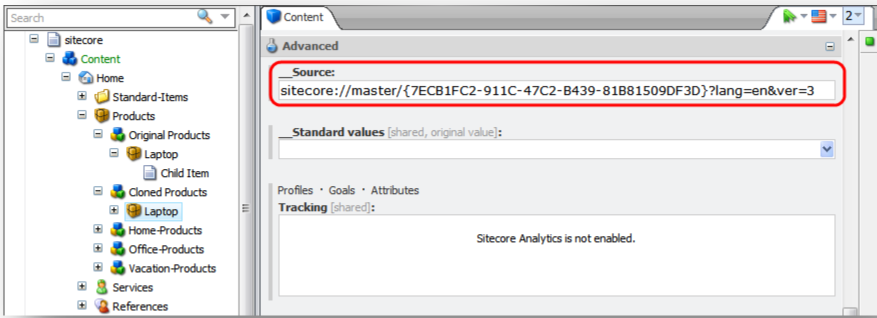
When you delete an original item, all its clones are uncloned.

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 __Source Field

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.



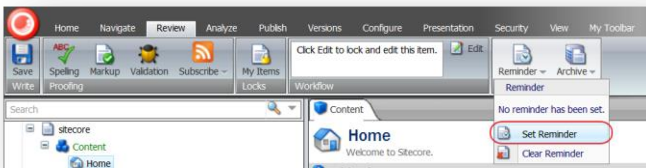
To view this section, in the **View** tab, select the **Standard Fields** check box.

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.

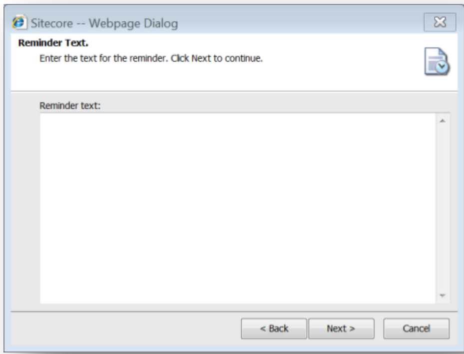
To set a reminder:

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**.

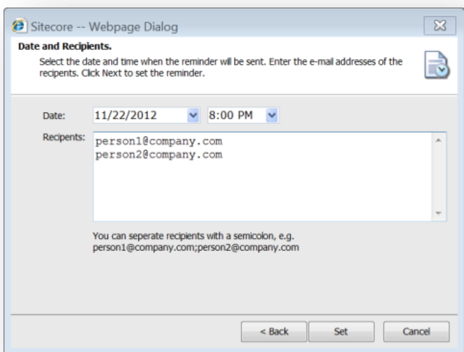


The **Set Reminder Wizard** opens.

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



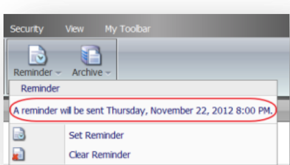
3. In the **Reminder Text** dialog box, in the **Reminder text** field, enter the text that you want to be sent to recipients as a reminder, and then click **Next**. The **Date and Recipients** dialog box opens.



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.



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.

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:

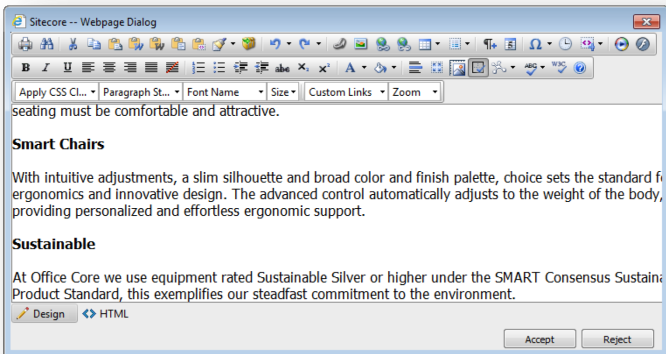
- Using the Rich Text Editor

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** to open the **Rich Text Editor**.
3. Click the **Paste Word** button and the text is pasted into the **Rich Text Editor**.

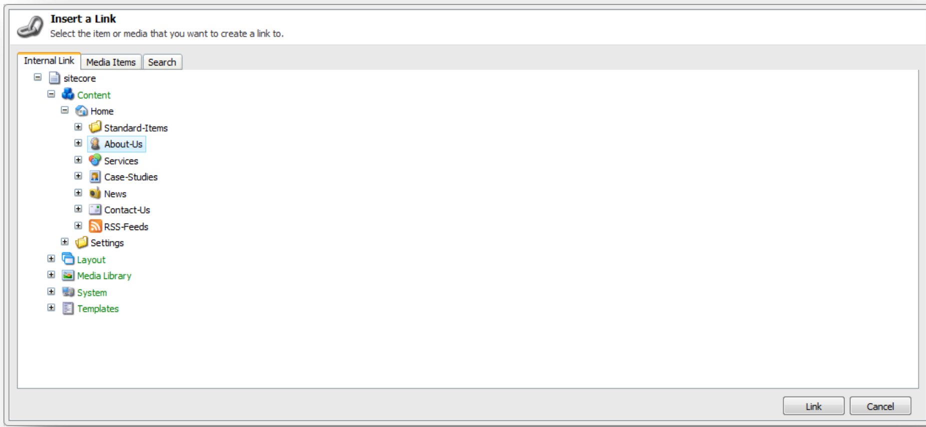
5.1.2 Inserting an Internal Link

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.



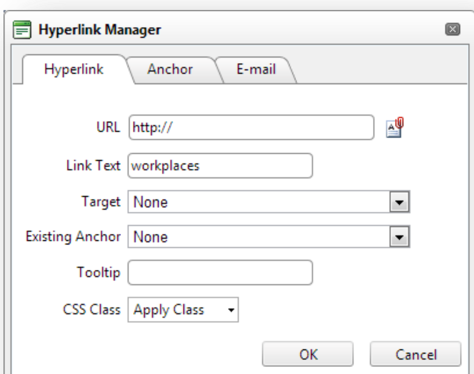
3. In the **Insert a Link** dialog box, you can select the item that you want to create a link to:
   - By navigating the content tree on the **Internal Link** tab.
   - By navigating the content tree on the **Media Items** tab if the item is a media item.
   - By searching for the item on the **Search** 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.



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.
Document Manager	Opens the **Document Manager** 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

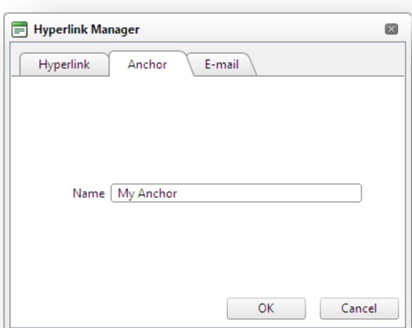
You can also use the **Hyperlink Manager** dialog box to edit existing links, create anchors, and create e-mail links.

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.

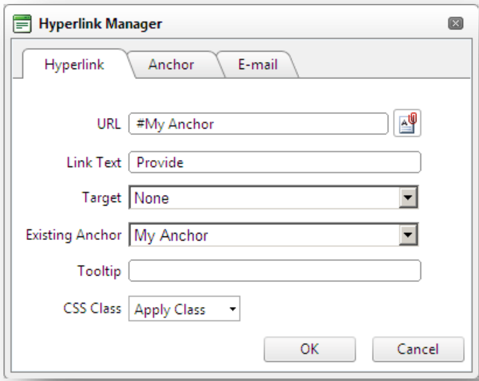
To create an anchor:

1. In the **Rich Text Editor**, select the image or text that you want to be an anchor.
2. Click the **Insert Link** button.
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.

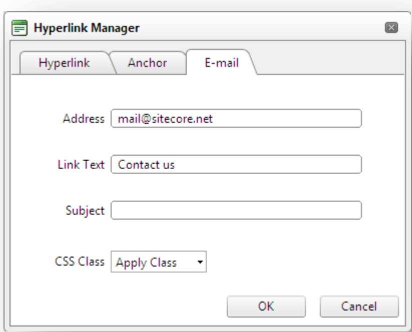


Creating e-mail links

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 .
3. In the **Hyperlink Manager** dialog box, click the **E-mail** tab.



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 . 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 amount of content items in one container that you can then search in to find specific content items. Item buckets is primarily targeted at storing content that does not need to be stored in a hierarchy.

This chapter contains the following sections:

6.1 Fundamental Concepts

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

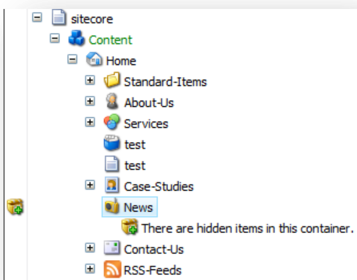
6.1.1 Item Bucket

An item bucket is a repository in the content tree that can store other 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 amount 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 via the Sitecore search engine.

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, you can 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. Additionally, 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 need 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 items in Sitecore using, for example, free text, search filters, or facets that makes 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 a 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 are automatically organized in an item bucket in a logical format, so that the performance of the search engine increases.

- 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 buckets as you want. This is useful if you want to split up your buckets into logical containers for example one for products and one for articles.

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 within the content tree that contains a large number of sub items such as products, media, or tags, it may be an advantage to turn these items into item buckets and thereby remove the need for hierarchically managing the content. Note that a connection between two or more items does not necessarily need to be hierarchically.

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
In an item bucket, we do not recommend using both non-bucketable and bucketable items. This can introduce unnecessary complexities for the developers.

Viewing Hidden Items

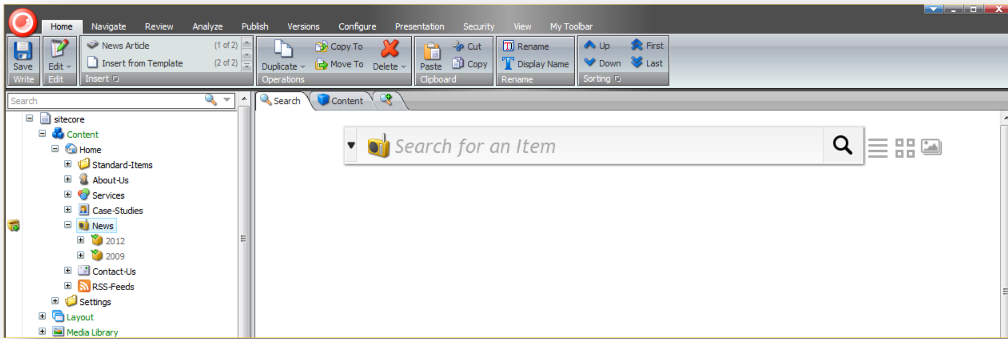
If you need to view the bucketable items that are hidden in the item bucket, in the Content Editor, on the **View** tab, in the **View** group, select the **Buckets** check box.

However, we recommend that you clear the **Buckets** check box when working with item buckets. This will prevent the system from unnecessarily loading all the items in the content tree and 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. This underlines the need for a search functionality that can help you to find specific content items that you need to edit. To this end, Sitecore has implemented a new search interface.

When you convert a content item into an item bucket, the item opens on 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 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 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 that already exists into an item bucket, the item bucket organizes and hides all its descendants if they are based on templates that are bucketable *or* if the item itself is set as bucketable. Depending on how many items it contains, it can take a considerable amount of time to organize the items after converting the item into an item bucket. A progress bar appears displaying a running tally of the items being processed. During the bucketing process it is possible to cancel the construction of the item bucket, in case you regret before the organizing of the items are complete.

Note
On a standard desktop PC we estimate that organizing 1000 items into an item bucket takes approximately 5-10 minutes.

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.

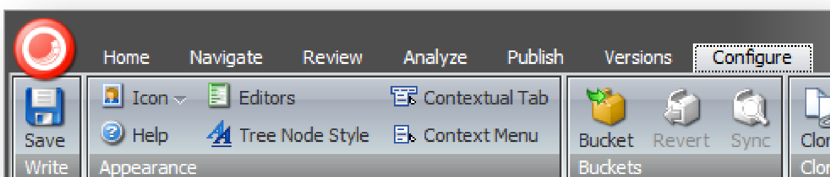
To create an item bucket:

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

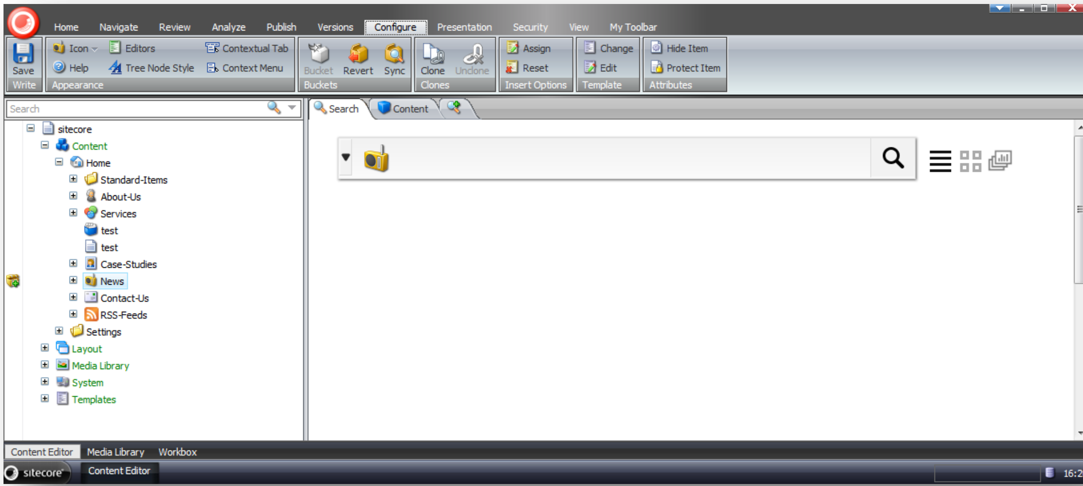
   Alternatively, select an existing content item.

2. In the content tree, select the content item and then 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 editing pane.



You use this tab to search for the content items that are otherwise hidden 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 an 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 left of the content tree**,** and select **Item Buckets**.

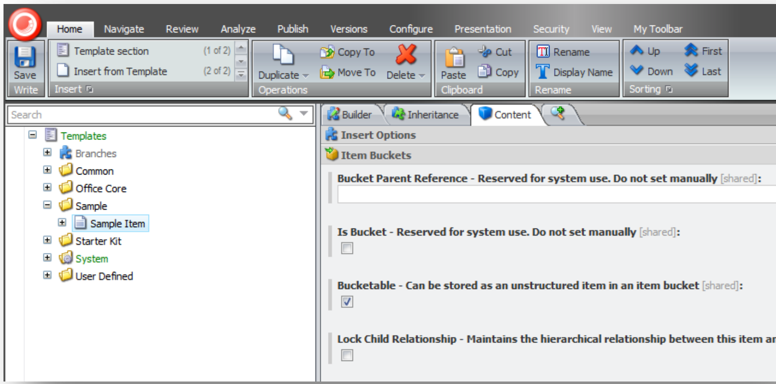
6.2.2 Making a Template Bucketable

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

To make a template bucketable:

1. In the **Content Editor**, on the **View** tab, in the **View** group, select the **Standard Fields** check box.
2. Select one of the content items that you want to make bucketable.
3. In the editing pane, on the **Content** tab, expand the **Quick Info** section.
4. Click the template link and the template that this content item is based on opens in the **Template Manager**.
5. In the **Template Manager**, in the content tree, expand the template in question and select the **_Standard Values** item.
6. In the editing pane, click the **Content** tab.

7. Scroll down and expand the **Item Buckets** section.



8. Select the **Bucketable** check box.
9. Save your changes.

   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.
10. In the **Content Editor**, select an item bucket that contains items based on this template.
11. On the **Configure** tab, in the **Buckets** group, click **Sync**.

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 to a Non-Bucketable Template

If you want to make a template non-bucketable again, you can clear the **Bucketable** check box. This however, does not make the items based on that template visible in the item bucket only by synchronizing the item bucket. To make the items that are based on the non-bucketable template visible again in the item bucket, you need to also revert the item bucket to a normal container and then make it bucketable again.

For more information about reverting an item bucket, see the section *Reverting an Item Bucket to a Normal Container.*

6.2.2. Synchronizing an Item Bucket

Whenever you make changes to the items in an item bucket you need to synchronize the item bucket to make sure all the items are organized correctly.

You should synchronize an item bucket when:

- Making the items in the item bucket bucketable.
- Making the items in the item bucket unbucketable.
- Updating the item bucket's template to be bucketable.
- Deleting an item from the item bucket.

- If the process of making an item bucketable fails during processing you can synchronize the item bucket after the process failed, and it will pick up from where it left off.

To synchronize an item bucket:

1. In the content tree, select the item bucket whose structure you want to update.
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.
   - All the content items that are based on bucketable templates are organized and hidden.
   - The normal content items remain visible.

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

6.2.3 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 new you want to create. Click **OK** and the content item is created in the item bucket and available in the search results of the item bucket.
4. The content pane of the new item opens from where you can further edit the item. As an example you can add tags to the new item, which is a great way to categorize your items and a quick way to search for the potentially millions of items in an item bucket.
5. 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 Template Bucketable*.

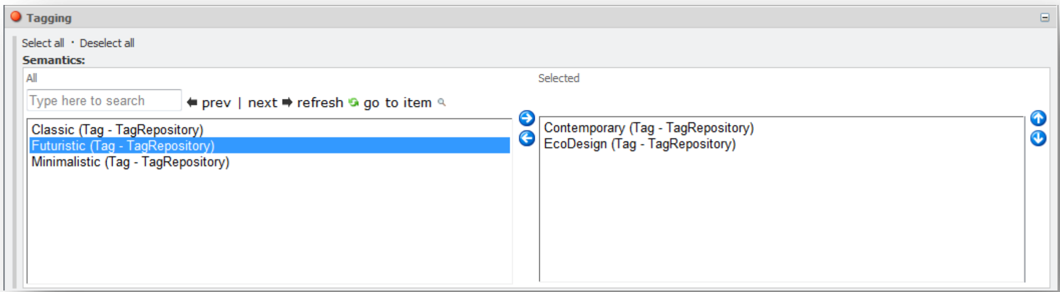
Tagging items

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



2. In the left field you can either search for a specific tag in the search field or manually select the tag that you want to add to the item. You can use SHIFT or CTRL to select multiple tags.

3. When you have selected the necessary tags, click the arrow to move the selected tags to the **Selected** field to the right.

   Use the arrow if you need to remove selected tags from the selected field or double-click a single tag to move it from one field to the other.

4. Click **Save**. Now you can insert and benefit from the search filter **Search by Tag** when searching for items in an item bucket. For more information on using search filters, see section *Search Filters.*

6.2.4 Deleting a Content Item from an Item Bucket

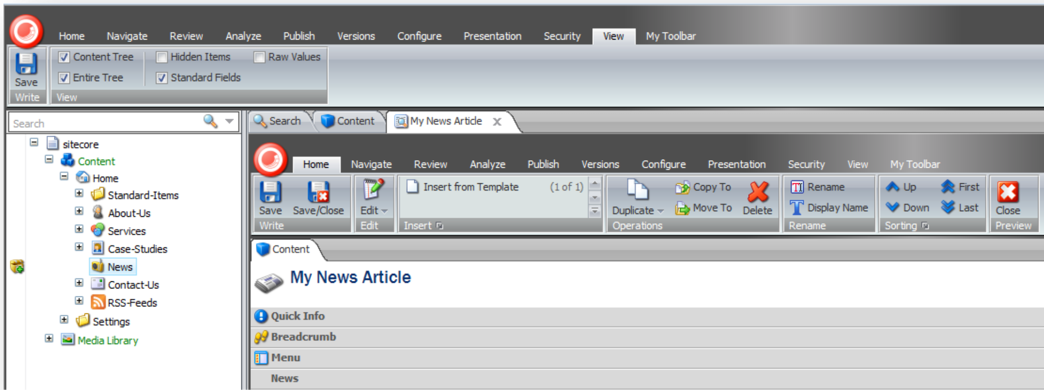
As you work with your website, you may need to delete a content item from an item bucket.

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 key word that will help identify the content item 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.



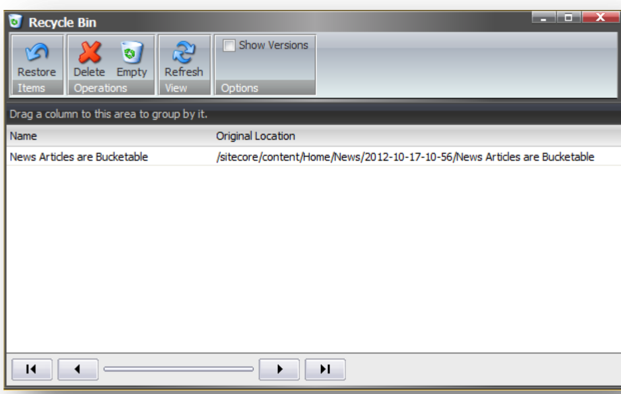
4. On the tab that displays the content item, on the **Home** tab, in the **Operations** group, click **Delete** and the item is deleted.
5. Sync the item bucket.

6.2.5 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 to also 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**.



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*.

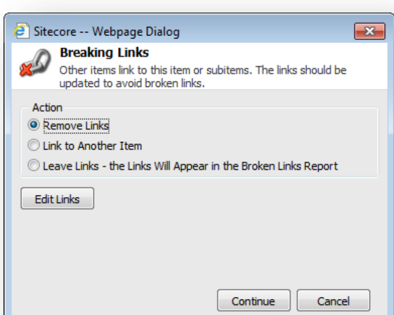
6.2.6 Deleting an Item Bucket

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 will break when you the delete the content item.

You can choose to:

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

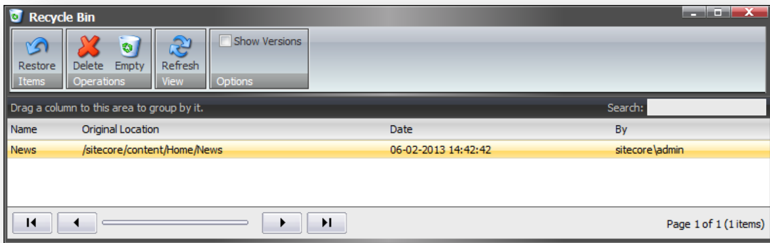


6.2.7 Restoring a Bucket and the Content Items

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 sub items.

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.

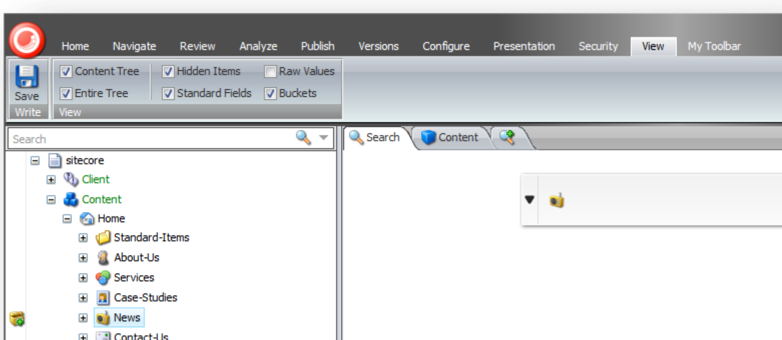
   For more information about rebuilding indexes, see the section *Restoring a Deleted Item to an Item Bucket*.

6.2.8 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 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 based on the date and time for when the item was 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.

6.2.9 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 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 revert to a normal container.
2. On the **Configure** tab, in the **Buckets** group, click **Revert**.

   The item bucket reverts back to being a normal container and all of the sub-items are displayed as structured items.

If you have lots of items stored in one bucket this may take some time.

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

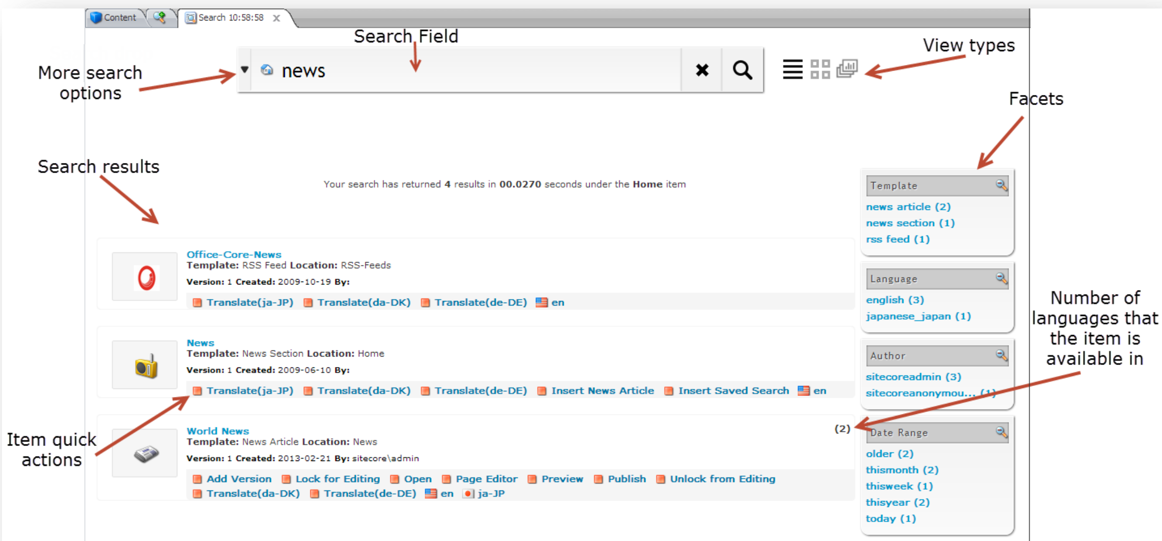
The Sitecore search engine can be accessed from every item in the content tree in the Content Editor or from the ribbon in the Page Editor. In the Content Editor, item buckets open directly on the search tab, because you need the search functionality to find and open the items that are hidden in an item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

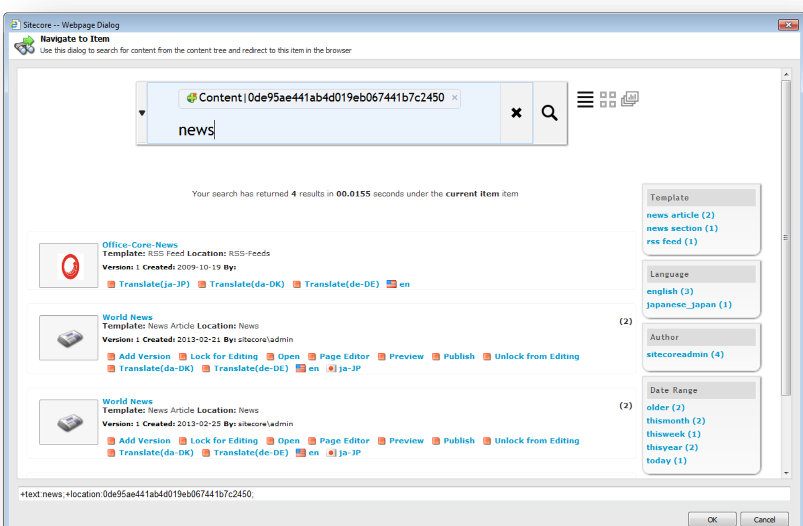
More Search Options

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 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.



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 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.

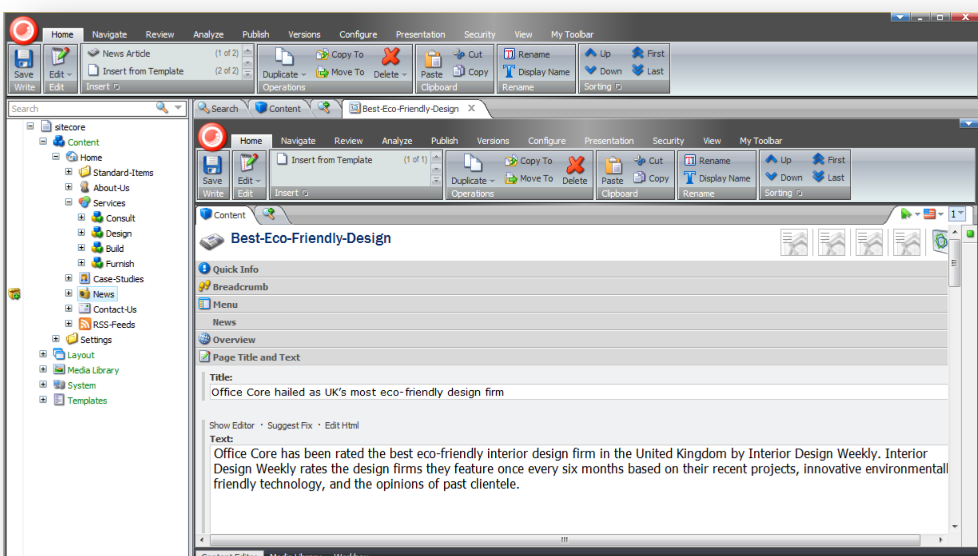
   Tip
   Enter * in the **Search** field and the search returns all the items within the item you have selected.

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

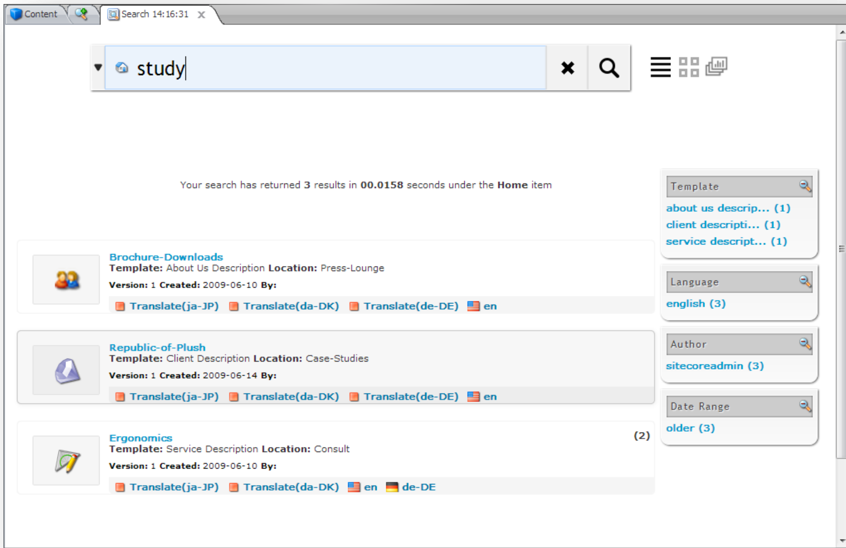
If you want to change the view of the search results, click one of the view icons to the right of the **Search** field. If you change the view, it launches the search again, based only on the keywords and filters in the **Search** field.

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.



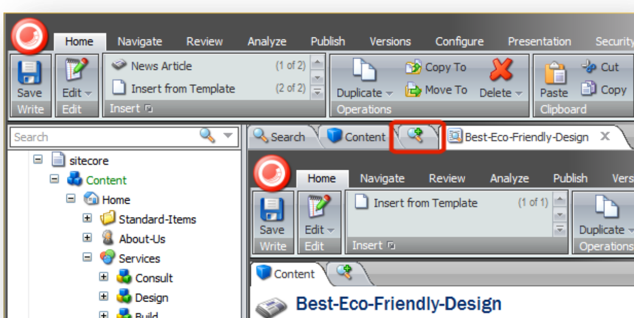
The options that are available in the item quick action bar are determined by the administrator. For more information about using the item quick actions, see the section *Using Item Quick Actions*

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**  tab.

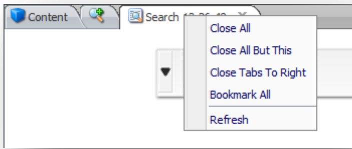


Managing Multiple Tabs

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:

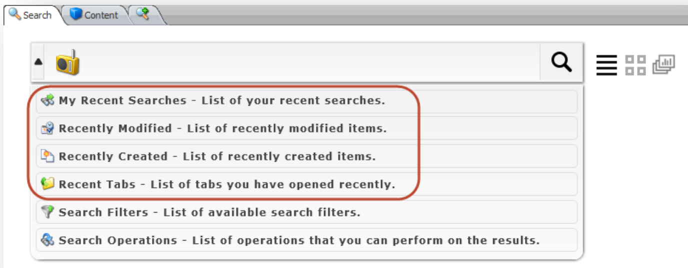
1. Right-click a new search tab and a menu appears.



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.

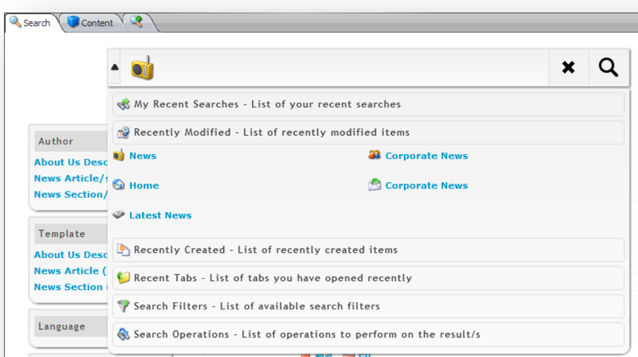


The pre-defined search options include:

- 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.



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**.

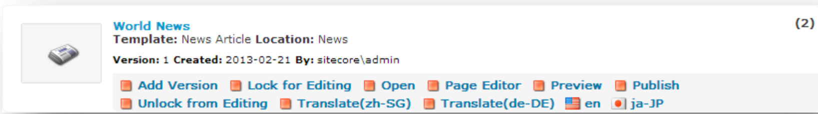
Note
The default options that are available in the drop-down menu can be customized by your administrator.

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.

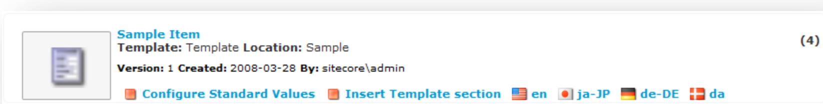


Note
The administrator determines which item quick actions are available. The item quick actions are set up on the item itself or on the template that the item is based on.

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.



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.

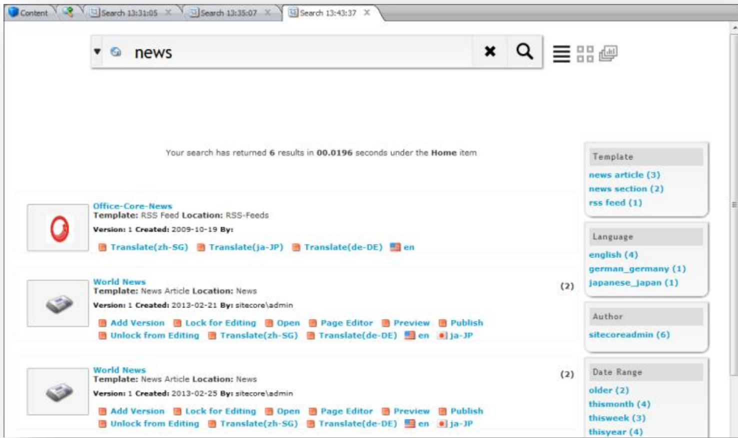
For example:

- 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.

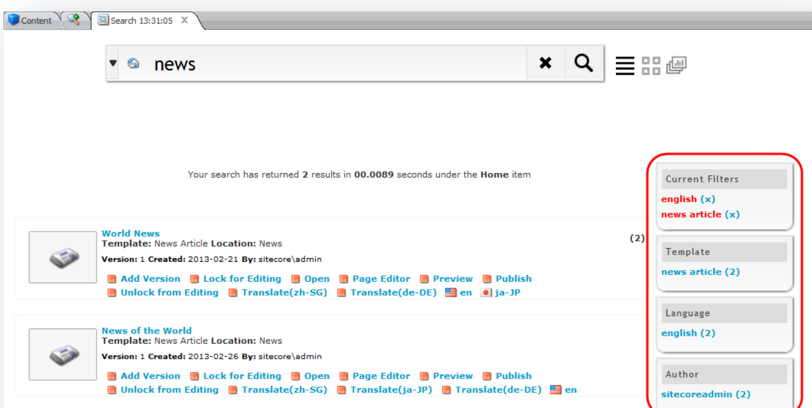
When you run a search, a search on the facets is also performed. All the facets that have been applied to the items returned by the search are listed on the right of the **Search** page.

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**.

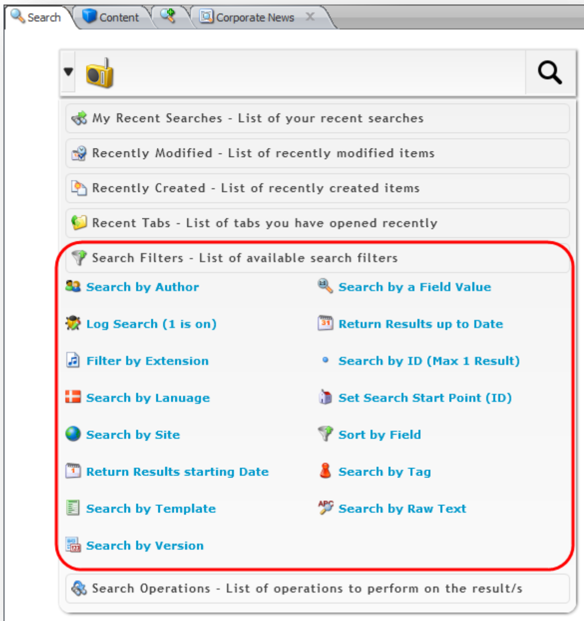
In the following screenshot, the *english* and *news article* facets have been selected, and only two items match that filter.



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.



To use search filters:

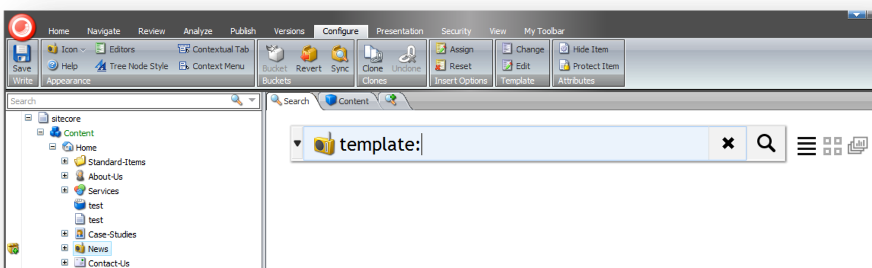
1. Click the drop-down arrow on the left of the **Search** field.
2. Expand the **Search Filters** option and select the required filter.

   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 *or* 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 Filters	Description
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 *design* in the **Title** field, enter *custom:title|design*.
Return Results up to Date	Search for items that were created on *or* before a specific date.
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 *sort:_name*. 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.



4. Press ENTER or click the **Search** button .

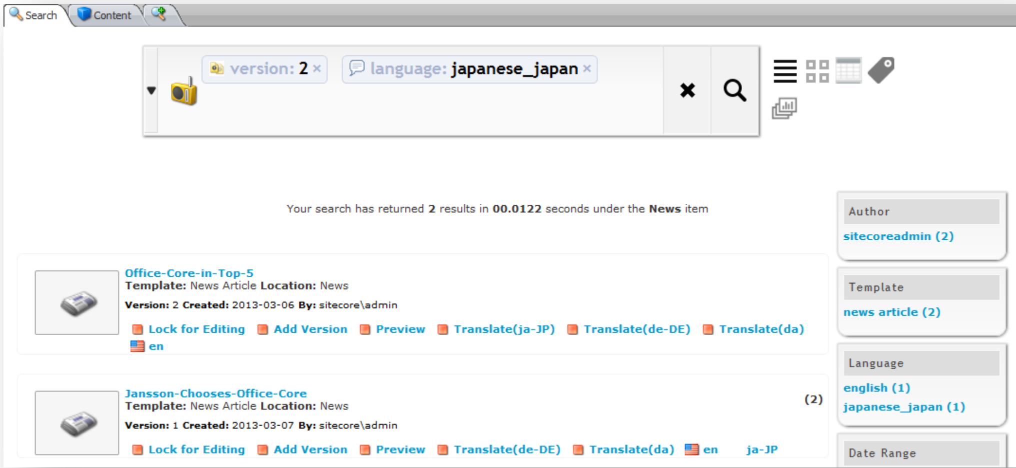
Note
Once you get familiar with the syntax for the different searches, you can type the search filter directly into the **Search** field, for example *author:*, *template:*, or *start:*. Sitecore still auto-suggests the text or prompts you to enter a date.

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.

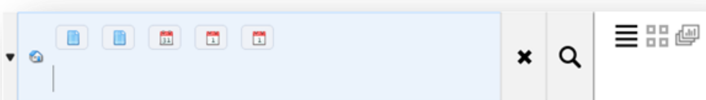
When you enter more than one search filter the search uses *or* logic by default. This means that the search returns items based on either the first filter *or* items based on one or more of the remaining search filters.

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



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.

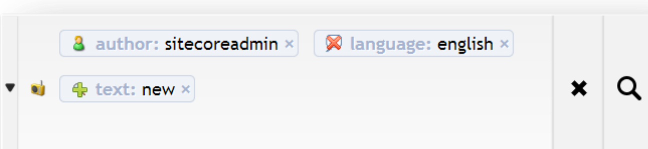


Combining *And* and *Not* in a Search Query

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 , 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 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.

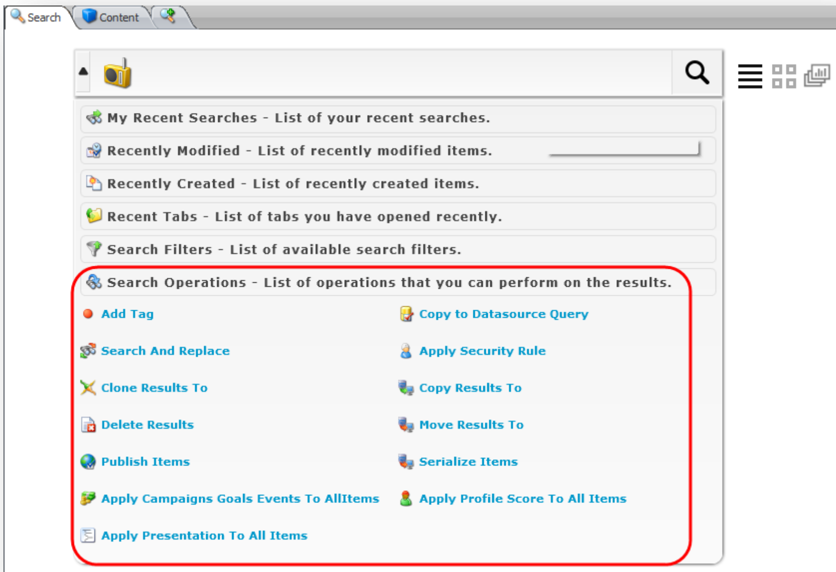


In the previous example, the search results *must* have the text *new* in the content, the results *cannot* be in the English language, and the items written by the sitecoreadmin user are listed at the top of the search results.

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 **Add Tag** and the **Item browser** dialog box opens. Find the tag you want to add to items in the search result, either from the **Items** option, where you can navigate to the tag in the content tree or from the **Search** 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 **Search and Replace** 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: *Office Core*|*Sitecore* in the text field. **Note** 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 **Clone Results To**, the **Clone Item** 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 **Browse** tab or click the **Search** tab to search for the location.
Delete Results	Delete the items that appear in the search result. When you click **Delete Results**, 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 **Delete Results**, all the search results are deleted from Sitecore completely and you are *not* able to restore them from the **Recycle Bin**.
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 **Apply Campaigns Goals Events To** the **Attributes** 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 *Marketing Operations Cookbook.*
Apply Presentation To All Items	When you click **Apply Presentation To All Items** the **Layout Details** 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 **Apply Security Rules** 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.

Search Operation	Description
Copy Results To	Copy all the items in the search result to another folder. When you click **Copy Results To**, the **Copy Item To** dialog box opens, from where you can browse to or search for the folder that you want to copy the items to.
Move Results To	Move all the items in the search result to another folder. When you click **Move Results To**, the **Move Item To** 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 **Apply Profile Score To All Items** the **Profile cards** window opens from where you can select a profile card or set a customized profile score for the items in the search result.

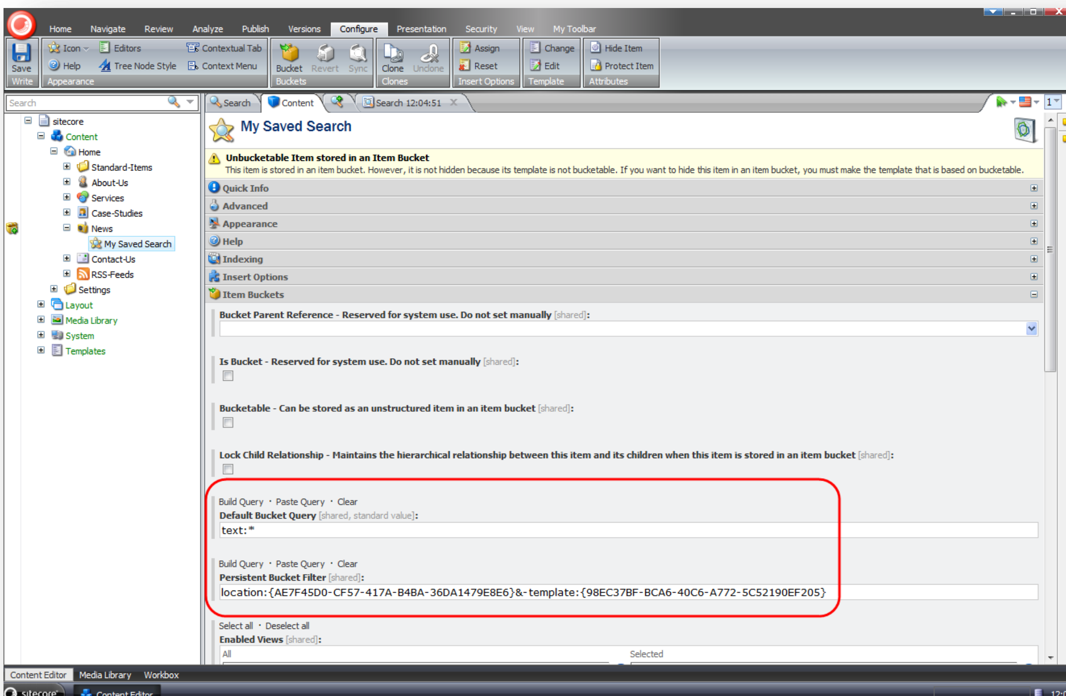
7.9 Saved Searches

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.



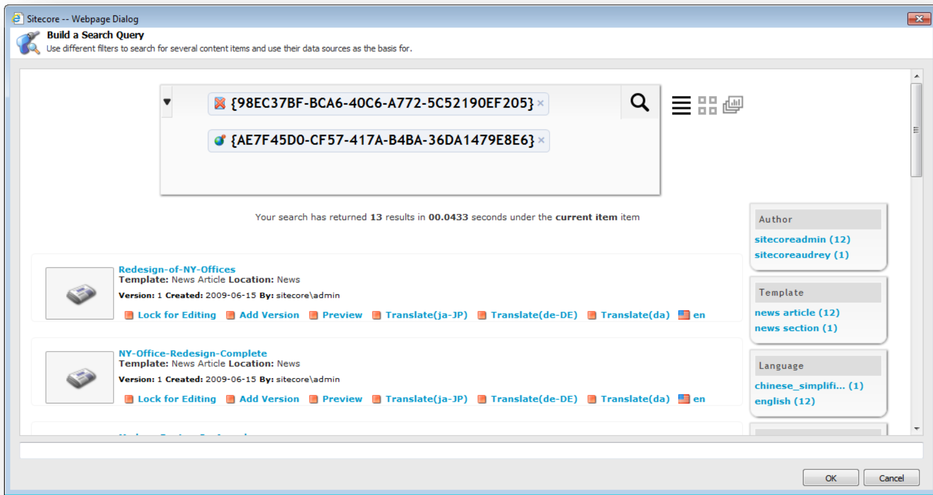
You can build:

- 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.

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.



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.

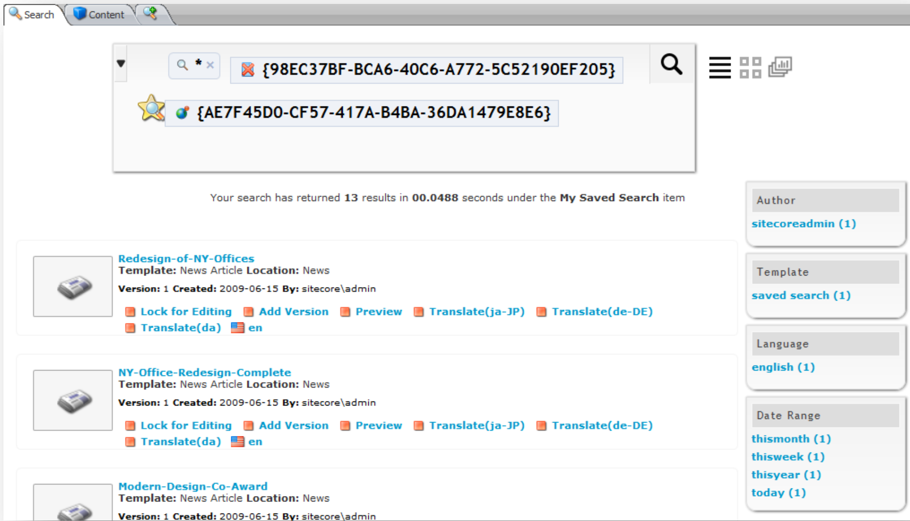
7.9.1 Run a Saved Search

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.



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*.

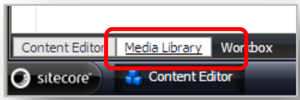
8.1.1 Opening the Media Library

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**.

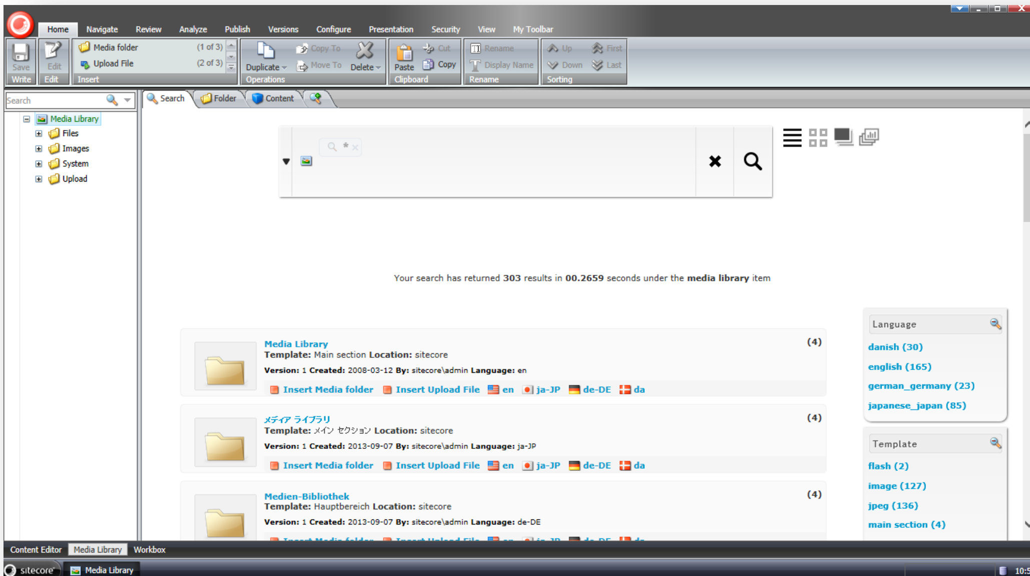


Sitecore Menu

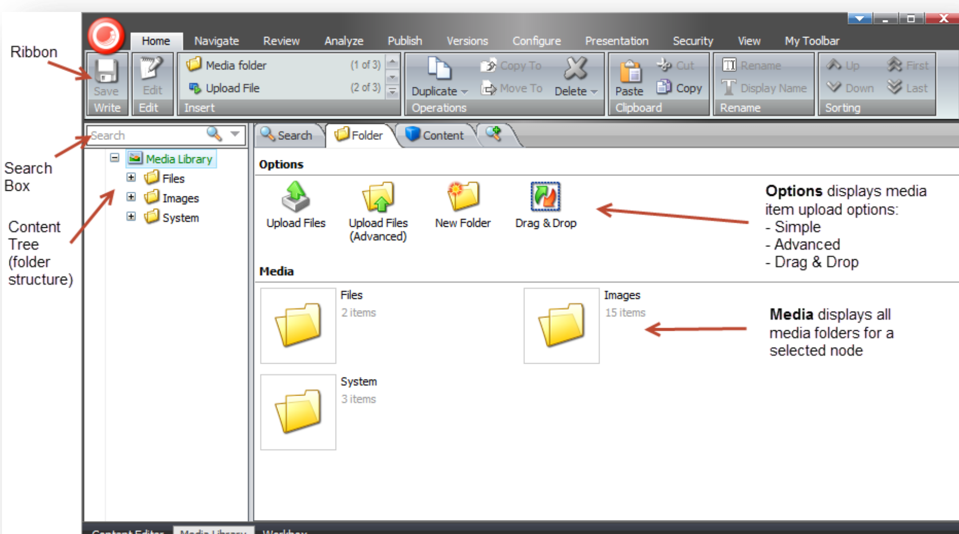
1. Log in to Sitecore as admin and select **Desktop**.
2. Click the **Sitecore** menu, and then click **Media Library**.

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.



The Media Library Folder tab consists of the following elements:



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:

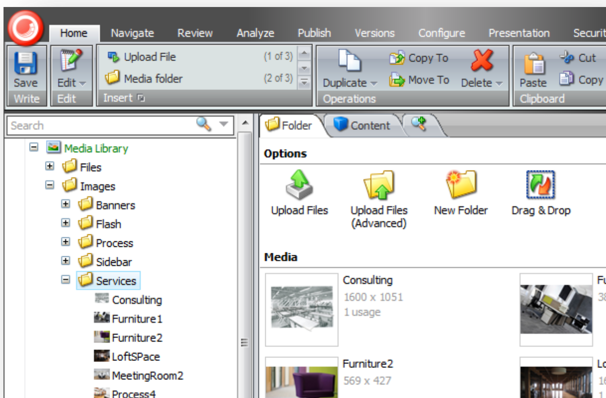
- Upload Files
- Upload Files (Advanced)
- Drag & Drop

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:

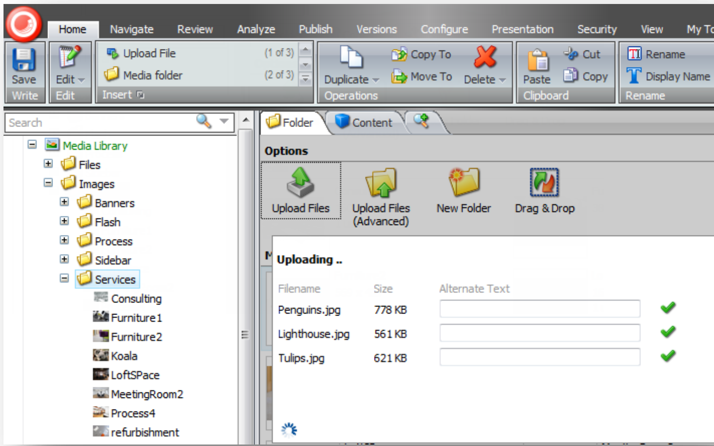
1. In the **Media Library**, in the content tree, select a destination folder.
2. In the right-hand pane, in the **Options** section, click **Upload Files**.



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:



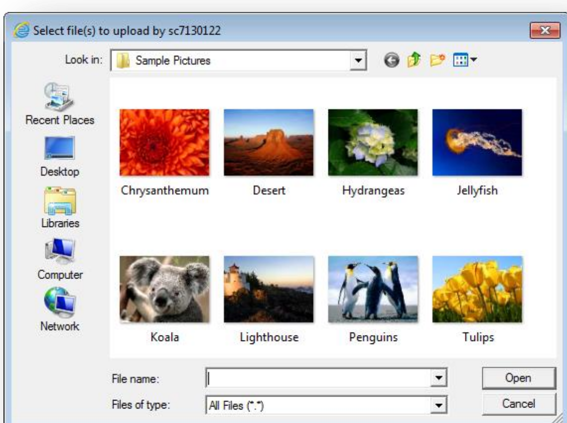
5. When the upload is complete, the image is displayed in the destination folder in the **Media Library**.

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:

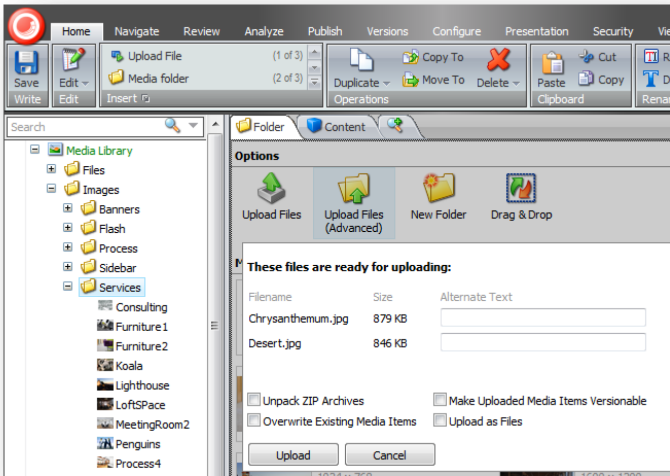
1. In the **Media Library**, in the content tree, select the destination folder.
2. In the right-hand pane, in the **Options** section, click **Upload Files (Advanced)**.



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**.

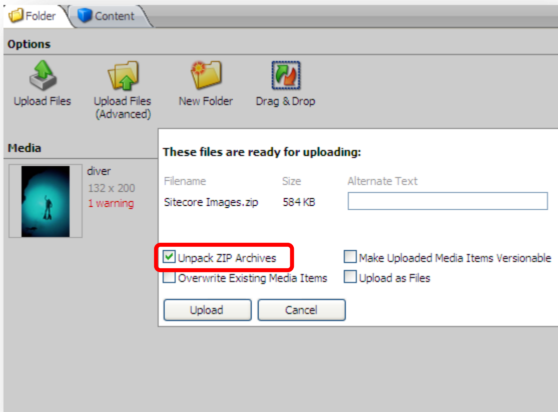
The uploaded images are displayed in the destination folder in the Media Library.

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.

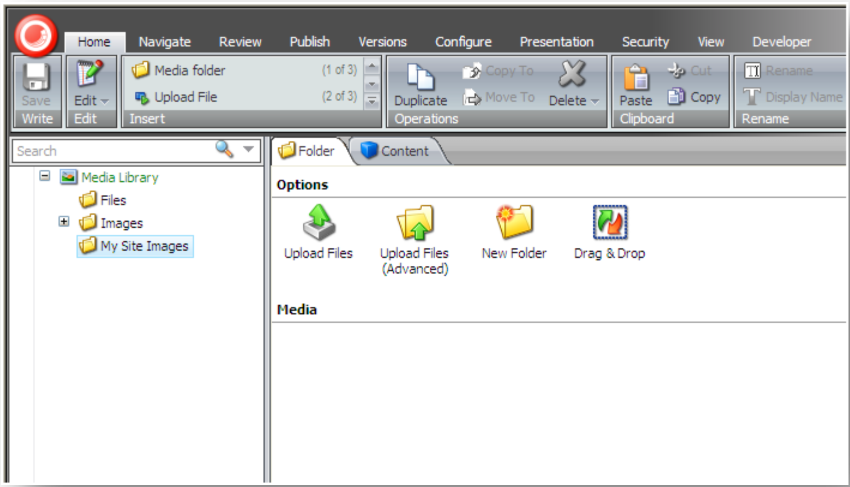


7. Click **Upload**.

   The archive is uploaded and extracted to the Media Library folder you selected.

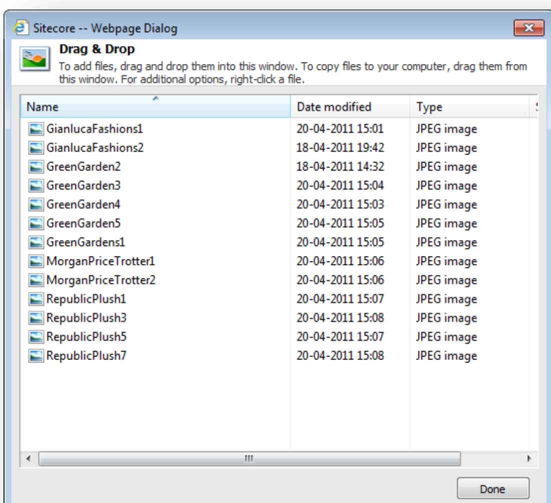
8.3.3 Uploading Files with Drag and Drop

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:

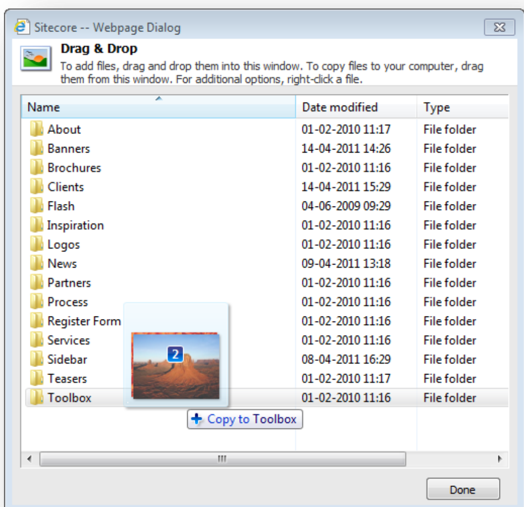
1. In a **Media Library**, select the folder that you want to upload the files to.
2. In the **Folder** tab, click **Drag & Drop** to open the **Drag and Drop** dialog box.



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.

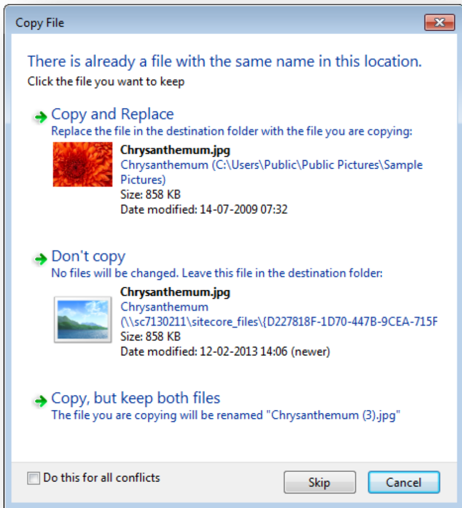
5. Position the **Windows Explorer** window next to the **Drag and Drop** dialog box and drag the selected images from **Windows Explorer** to the **Drag and Drop** dialog box.



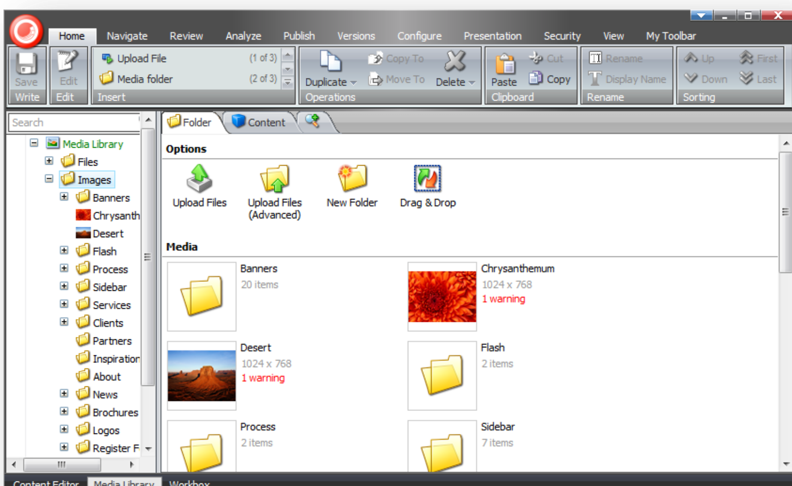
Note
You have additional options to manage your media items in the Drag & Drop dialog box by right-clicking an item. However, it is recommended to primarily manage and organize the media items from the Media Library.

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.



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

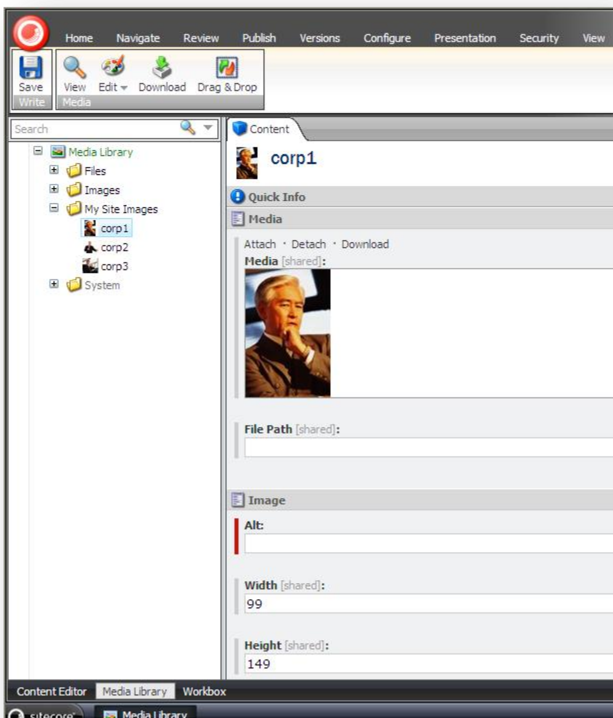
In the Media Library, you can edit media items such as images, documents and videos either using Sitecore tools such as the Image Editor for images or with other applications that you have installed on your computer such as Microsoft Word for documents or Photoshop for images.

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

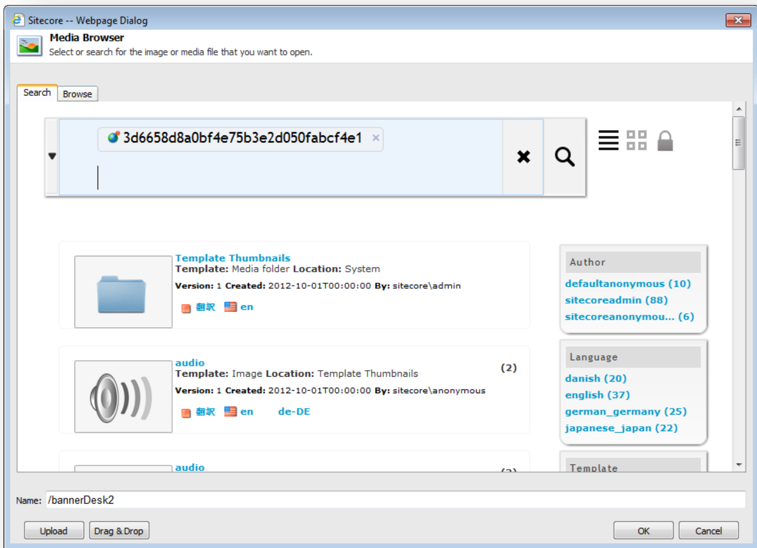
To open an image for editing in the Image Editor:

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.

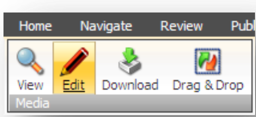
You can access the Media Browser from the Content Editor. In a content item, in an **Image** field, click **Browse** to open the **Media Browser** window.



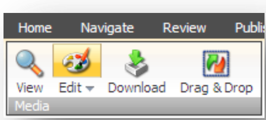
8.4.3 Editing Options

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.

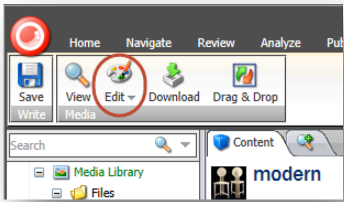
When you click on a media item, the **Edit** icon in the **Media** group changes depending on the type of file you want to edit. For example, if you click a Word document, you see a pencil as the associated icon.



If you click on an image, you see an artist's palette.



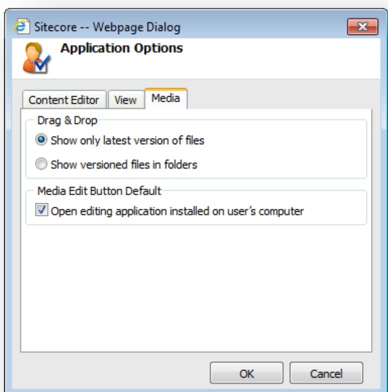
If you select an image item and then click the top half of the Edit command, you open the image in the **Sitecore Image Editor** by default.



You can change the default setting and use a different image editing program.

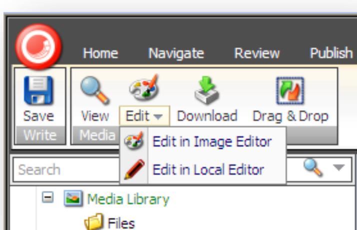
To change you default image editor:

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

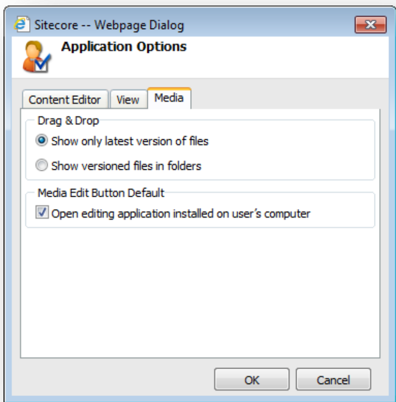
You can also use the Drag & Drop dialog box to select a file and edit it.

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.

   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

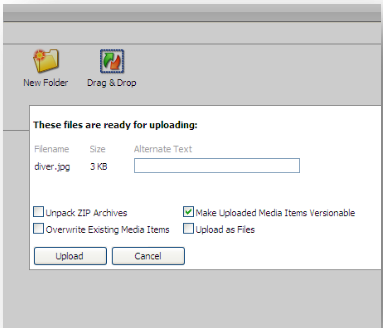
You have a media item called *diver*. In the Content Editor, you click the **Versions** tab and make a second version of this item.

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.



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.

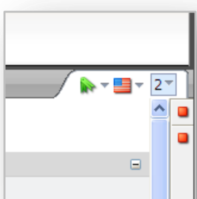
Note
When you upload new media files to the Media Library, they are unversioned by default.

8.5.2 Creating a Second Numbered Version of a Media Item

To make a second numbered version of a media item:

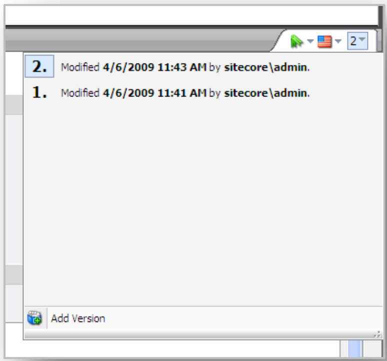
1. In the Media Library content tree, select a media item.
2. Click the **Versions** tab and in the **Versions** group, click **Add**, to add a new version.

   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. 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.

1. 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.

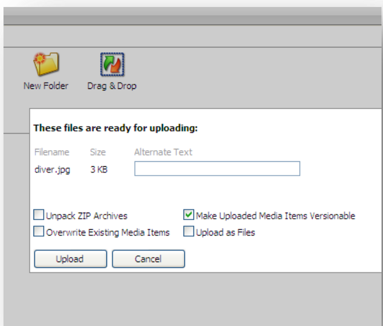
Changing this setting in the `web.config` file makes every file that you upload to the **Drag & Drop** dialog box versionable.

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**.

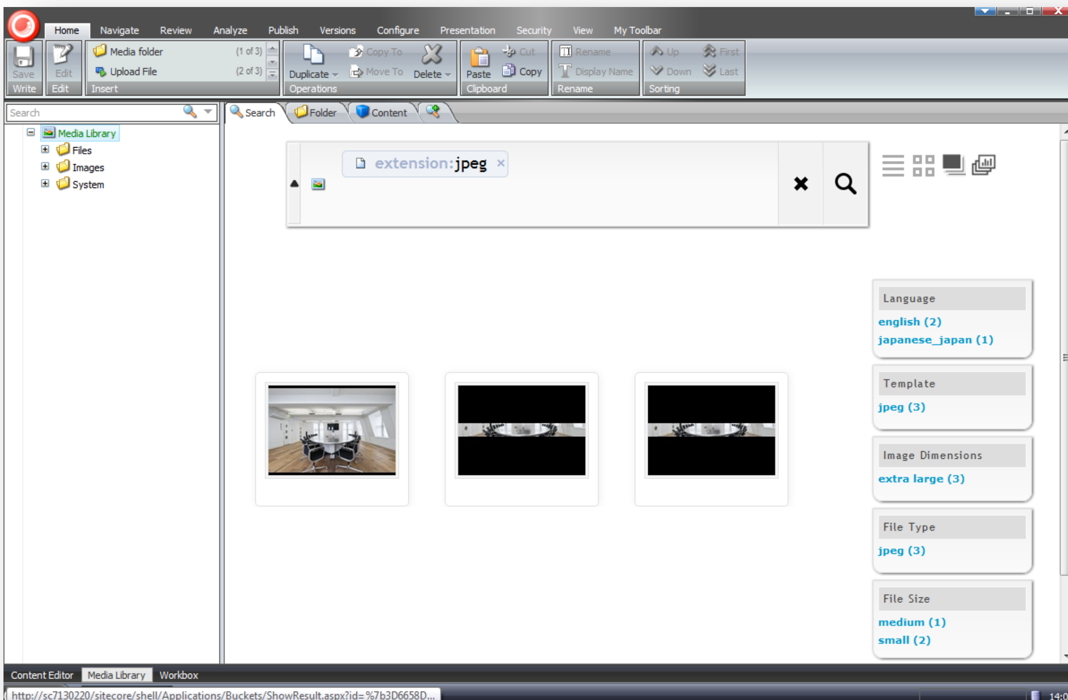
This makes the files you are currently uploading versionable. You must select this check box every time you upload some files to the Media Library.

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.



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

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

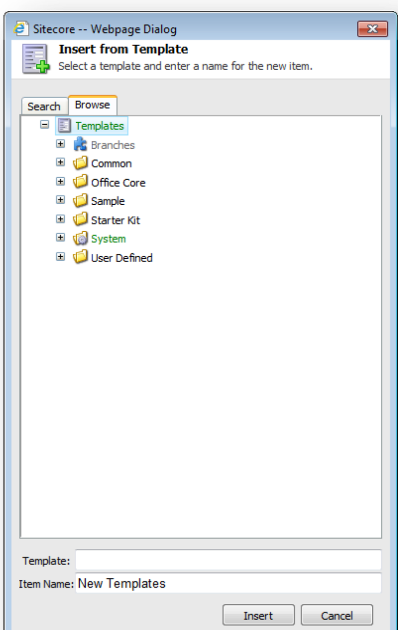
In Sitecore, you *must* use the Content Editor to set up an RSS feed.

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`

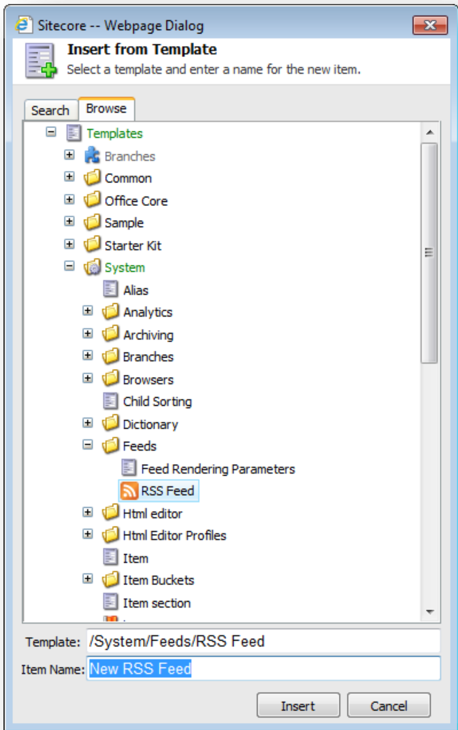


4. Give the new folder a name — *RSS Feeds*.

Now that you have created a folder to store the RSS feeds in, you can create an RSS feed.

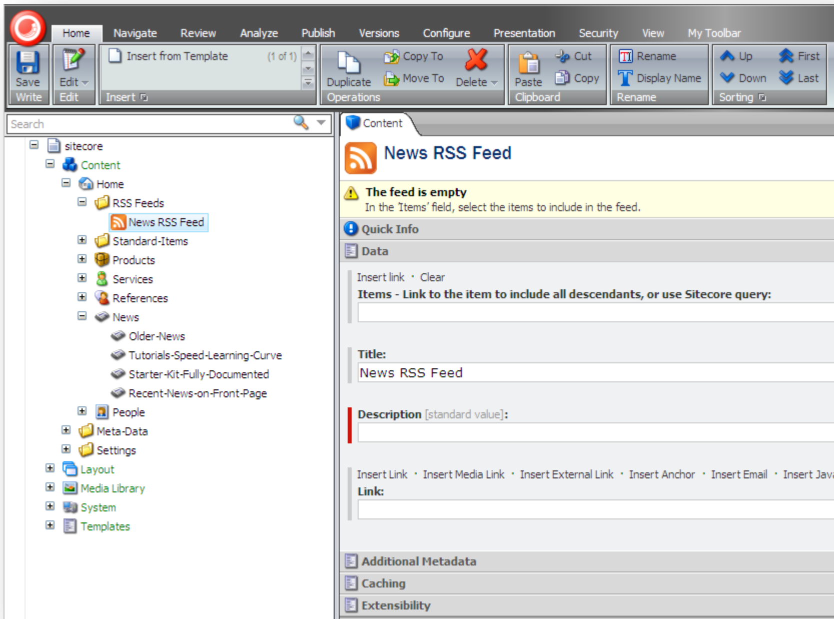
To create an RSS feed in the Content Editor:

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**.



3. In the **Insert from Template** dialog box, navigate to `Templates/System/Feeds/`, 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.*

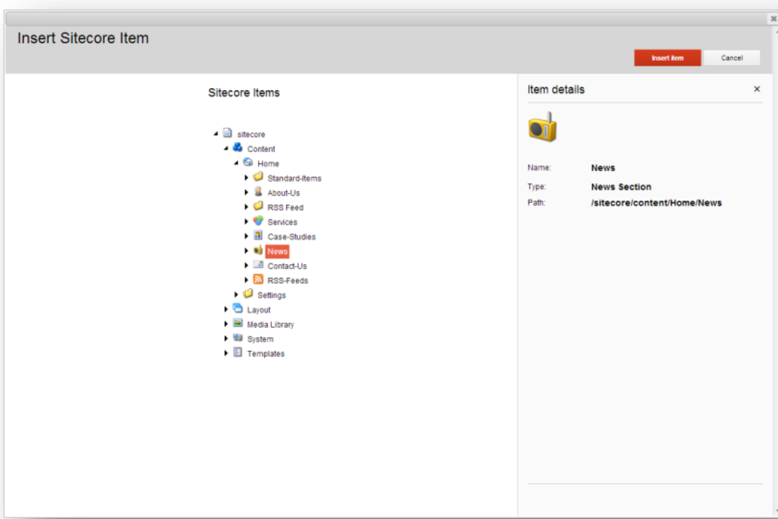
5. Click **Insert** and the new feed item is created and opened in the **Content Editor**.



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.



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.

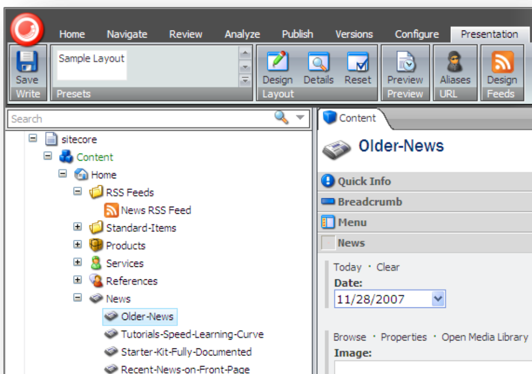
Now let's think about what the feed should contain. The feed should *not* tell subscribers that the **News** item has been updated; it should contain information about news articles that are created or updated.

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.

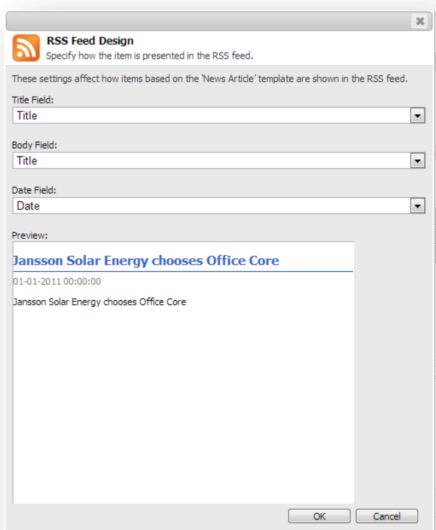
The next step is to configure how the news articles are presented in the RSS feed.

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**.



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.
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.

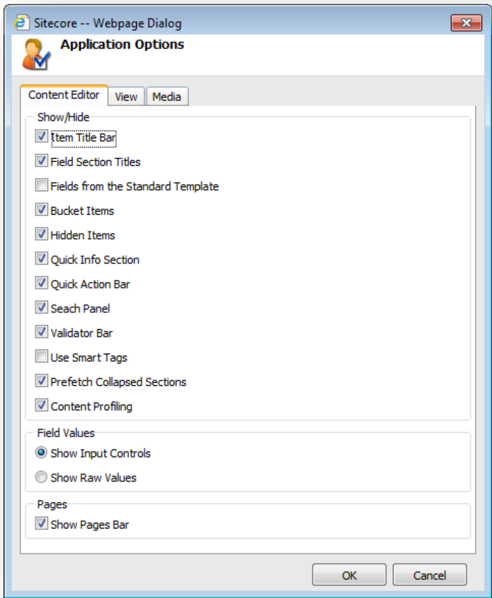
Identifying the Template that an Item is Based On

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.

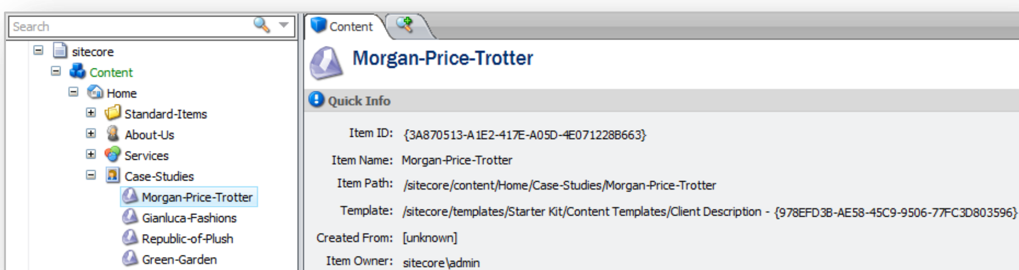
But when you set up RSS feeds, it might be helpful to see which template the item is based on. This is because the way the items are presented in the RSS feed depends on the template that they are based on.

To see which template an item is based on:

1. In the **Content Editor**, click the **Sitecore** button, and then click **Application Options**.



2. In the **Application Options** dialog box, select the **Quick Info Section** option and click **OK**.
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.



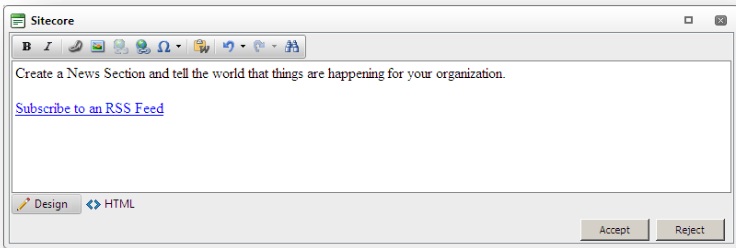
6. The **Template** field tells you which template the item is based on. If you click the link to the template Sitecore opens the template item.

9.1.2 Creating a Link to the RSS Feed

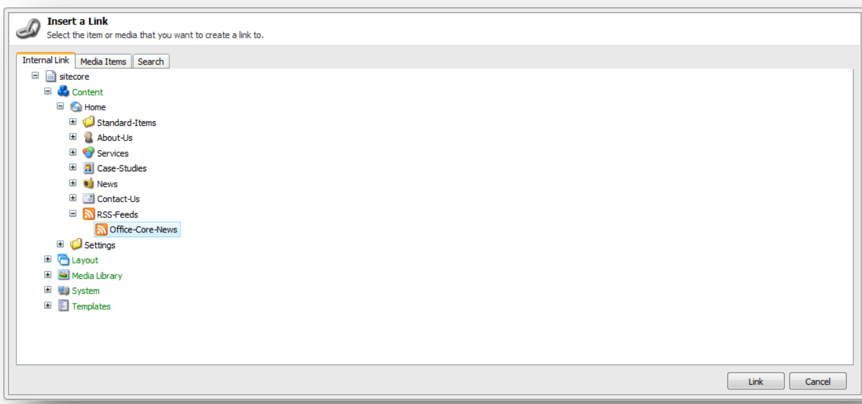
After you have defined the RSS feed, you must add a link to the parent content item so that users can subscribe to the feed.

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.



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.

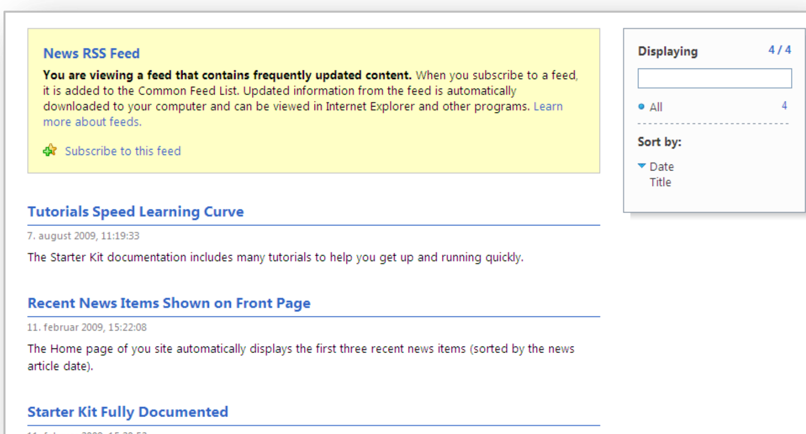
9.1.3 Subscribing to an RSS Feed

When a visitor logs on to the website they can easily subscribe to the RSS feed.

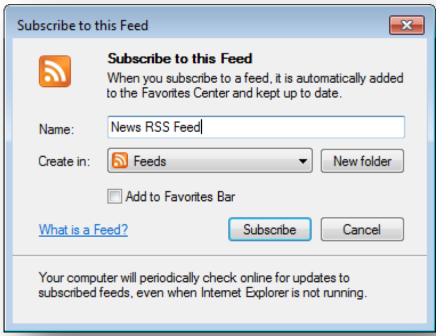
To subscribe to the RSS feed:

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.



4. In the *RSS Feed* page, click **Subscribe to this feed**.



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*.

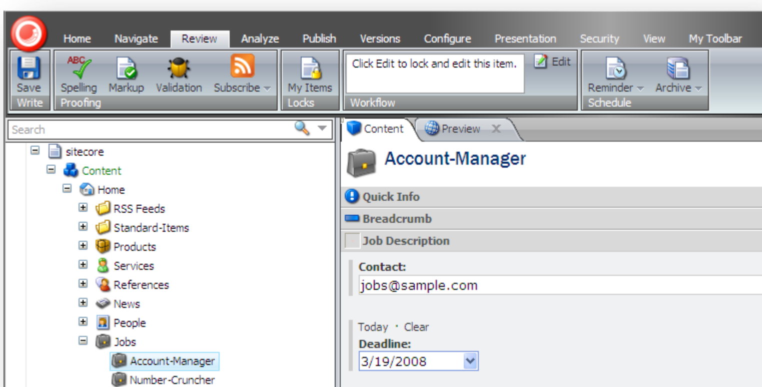
9.2.1 Item Feeds

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.

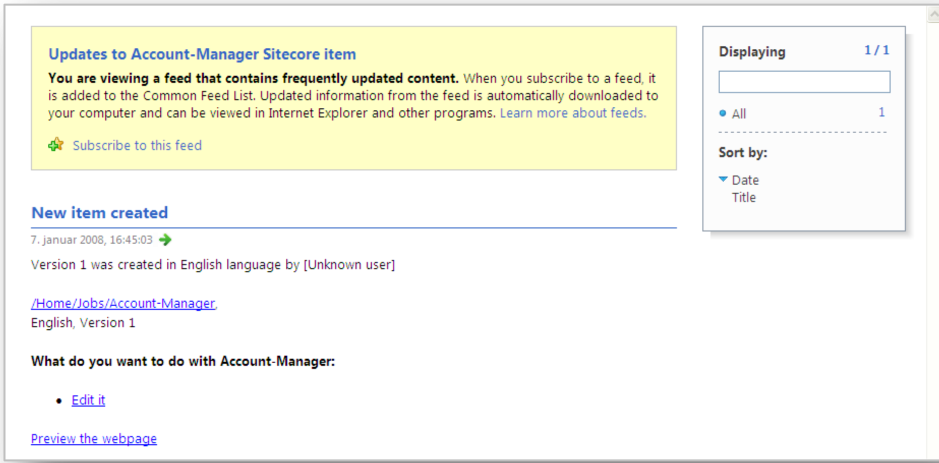
To subscribe to a Sitecore item feed:

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**.

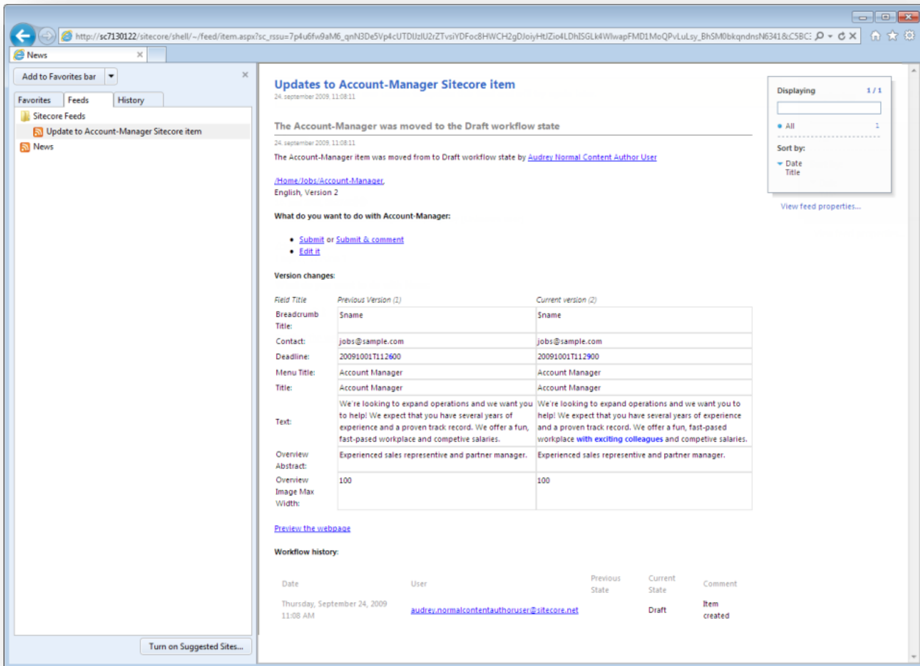


3. In the web page that opens, click **Subscribe to this feed** and add this RSS feed to your favorites.

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.



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.

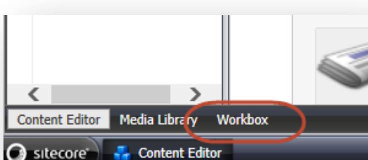
It also contains some workflow commands that let you move the item through the workflow — if you have the appropriate permissions.

Sitecore Workflow Feeds

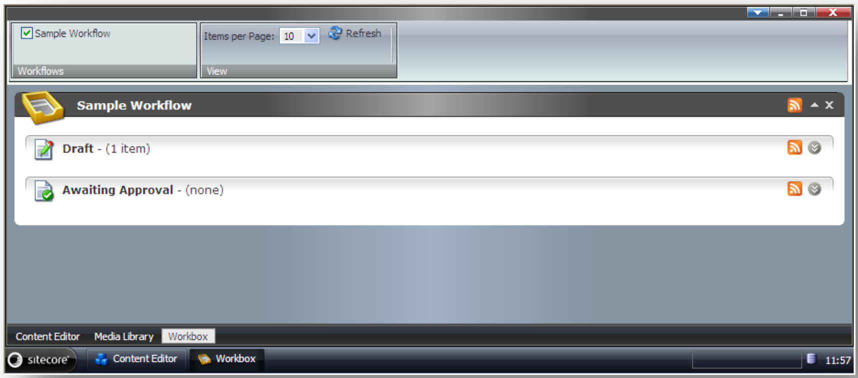
Sitecore also contains some workflow feeds that you can subscribe to. For more information on workflows, see the section *Workflows for Content Editors*.

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.

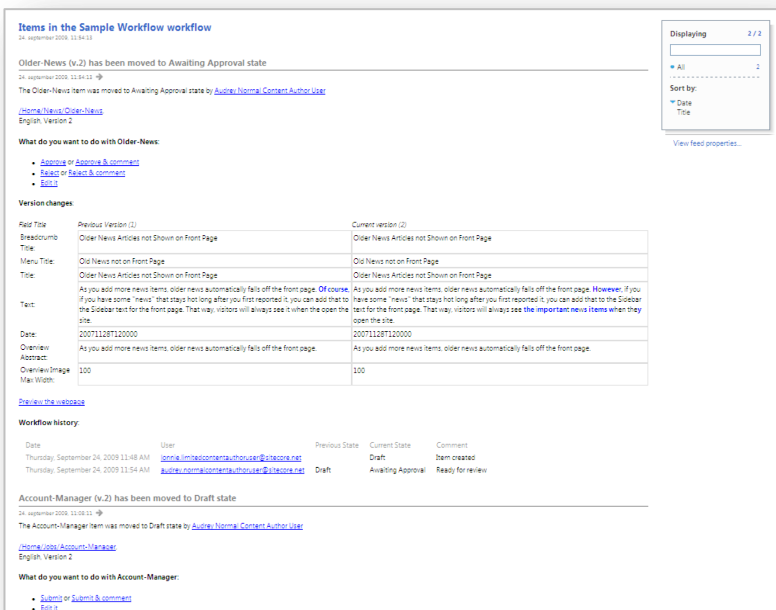


2. To subscribe to a workflow feed, click the **RSS feed** button to the right of the workflow.



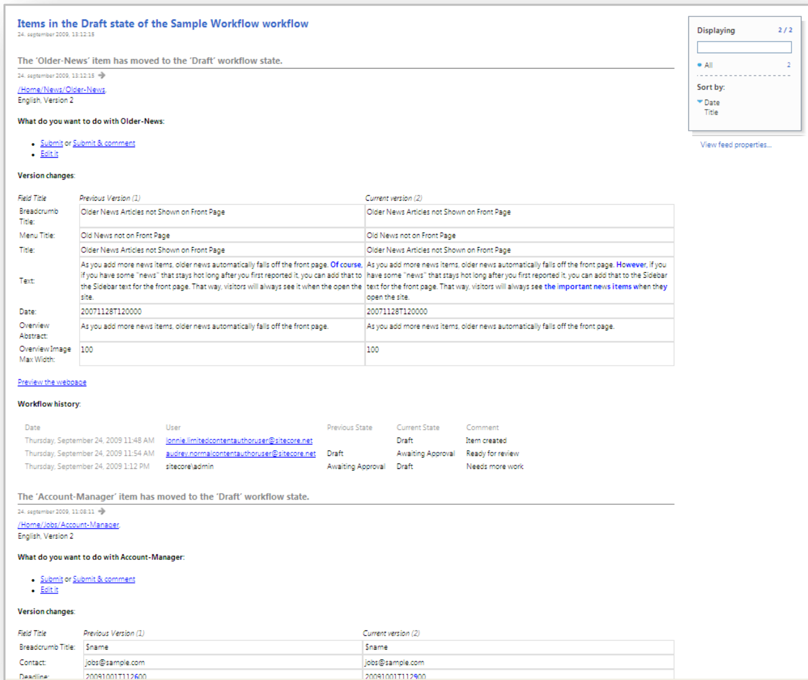
For more information on the Workbox, see the section *The Workbox*.

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.



3. To subscribe to a workflow state feed, click the **RSS feed** button for the workflow state.

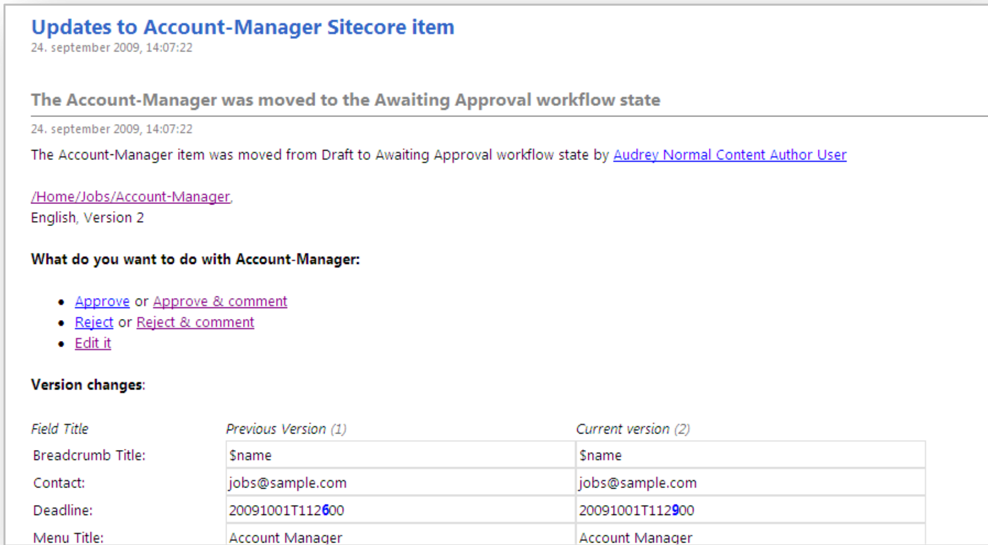
This client feed keeps you up to date on this particular workflow state. This client feed is useful for content authors and managers who only have access to particular workflow states.



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.

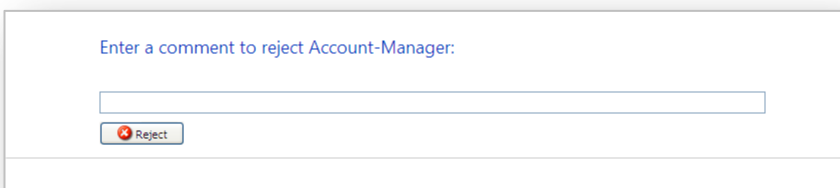
For example, in the following feed:



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:



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:

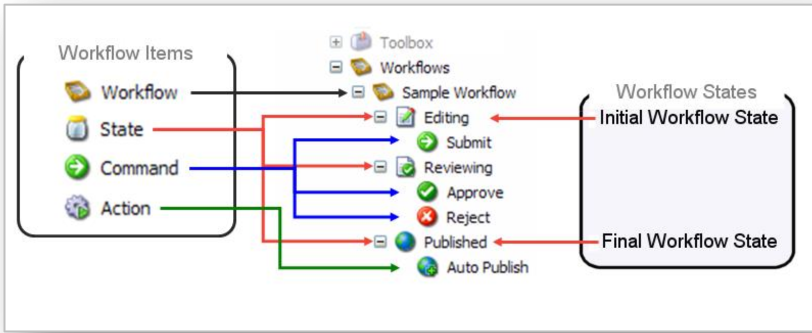
A Workflow — the main item that contains all of the subitems that make up the workflow.

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 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.

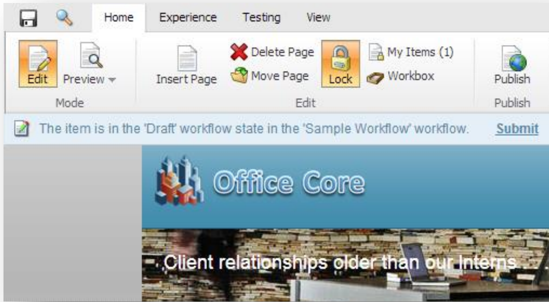
Moving Items through a Workflow in the Page Editor

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:

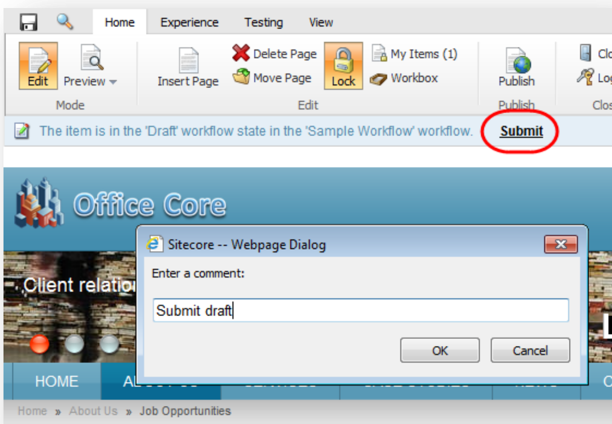
1. In the **Page Editor**, navigate to the page you want to work on.

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.



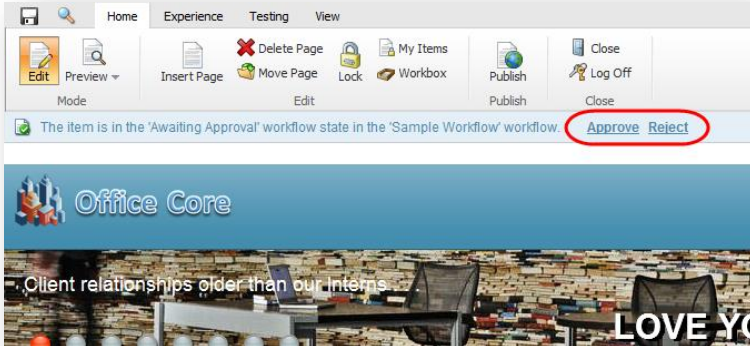
In the Page Editor, there is a notification bar that displays a workflow command — *Submit*. This is the only workflow command that you can apply to the current page in its present workflow state.

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.



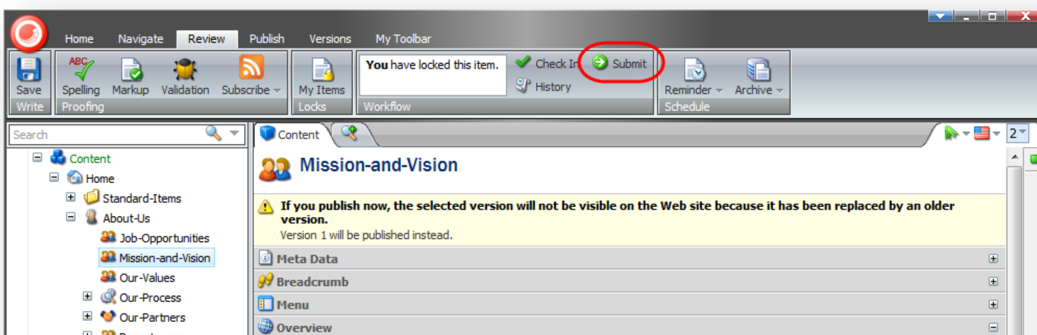
However, if you do not have permission to edit the content item in this workflow state, you cannot lock the item for editing and the workflow commands will not be displayed.

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:

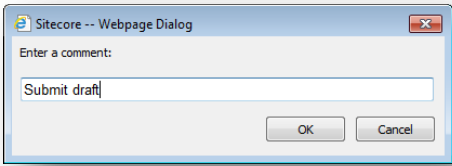
1. In the **Content Editor**, open the content item that you are working on.
2. When you are satisfied that it can be sent on through the workflow, click the **Review** tab.



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.

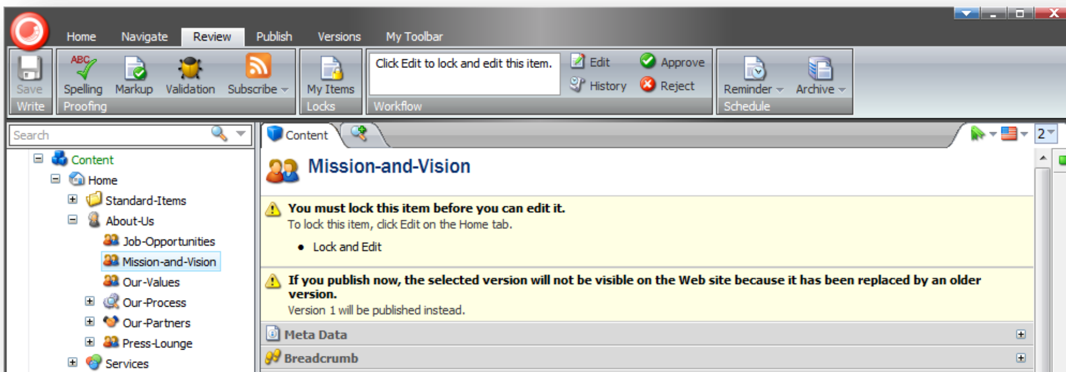
Furthermore, the content item also displays a message informing you that this version of the item cannot be published because it is not in the final workflow state.

3. Click **Submit** to send the content item to the next workflow state. Sitecore displays a dialog box for you to enter a comment:



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.

10.2 The Workbox

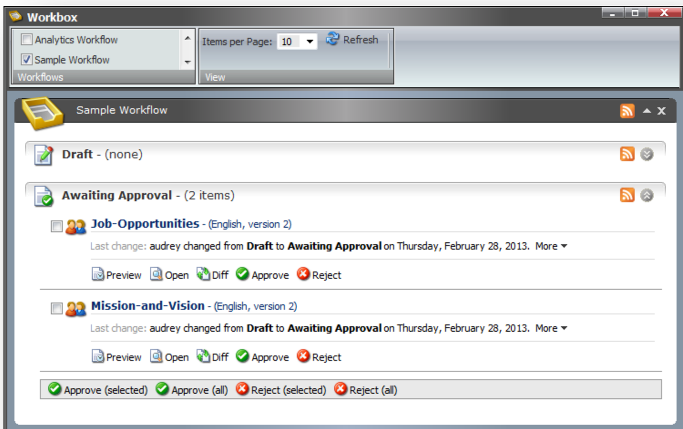
The Workbox is a tool for reviewers and managers and gives them the overview they need to perform their tasks.

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**.



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

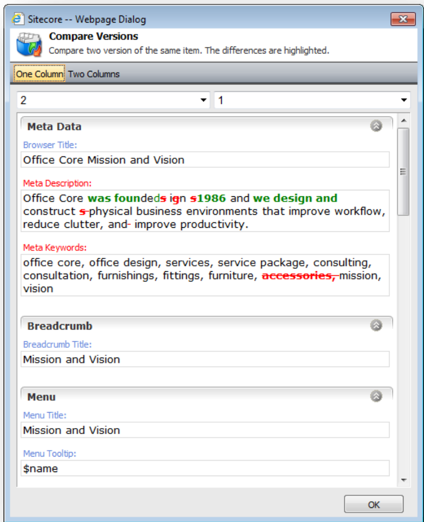
To preview the version of a content item that is in a workflow state, click **Preview** and this version of the item is displayed in a new browser window.

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**.



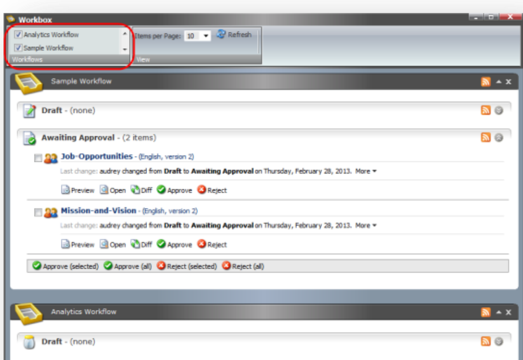
The **Compare Versions** dialog box lets you see the changes that have been made to this version of the item. You can select which versions to compare and whether you want them displayed in one or two columns.

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.



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.

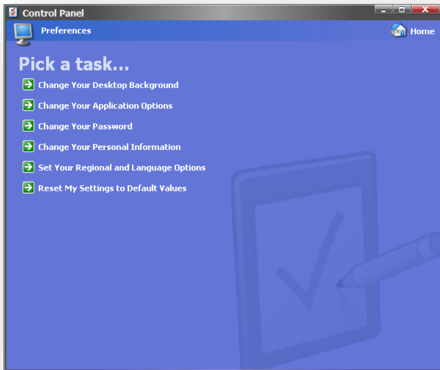
Changing the Desktop Background

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**.



3. In the **Preferences** dialog box, click **Change Your Desktop Background**.

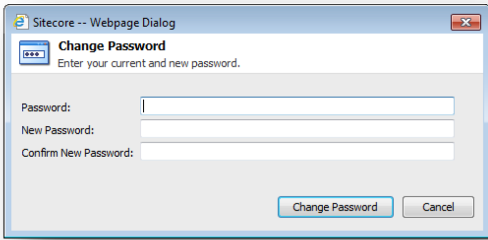
4. In the **Background** field, select the image that you want to use.
5. In the **Position** field, use the drop down arrow to select how you want to place the image on the desktop.
6. In the **Color** field, select the color you want to surround the image if it does not fill the screen.

Changing Your Password

To change your password:

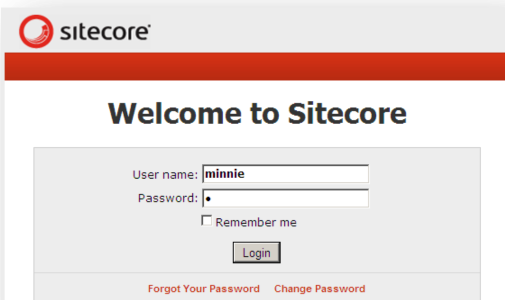
1. In the **Sitecore Desktop**, click the **Sitecore** menu and then click **Control Panel**, **Preferences**.

2. In the **Preferences** dialog box, click **Change Your Password**.



3. In the **Change Password** dialog box, enter your current password and then enter and confirm your new password.

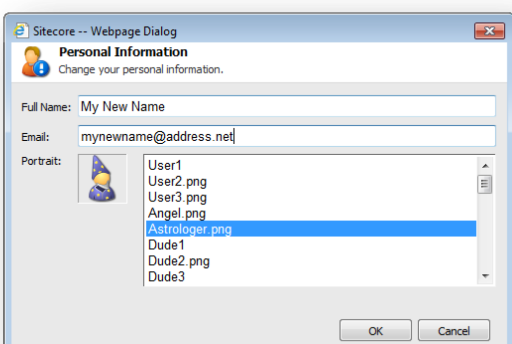
You can also change your password in the Sitecore log in page.



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**.

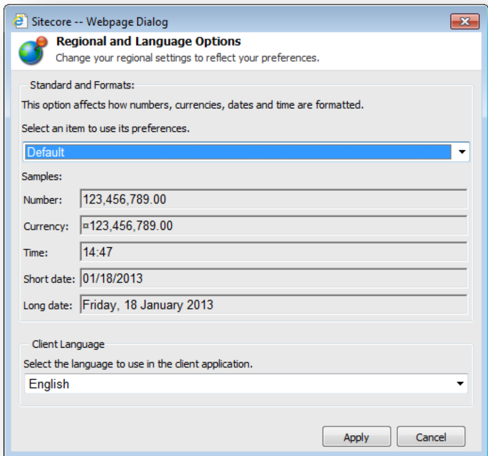


3. In the **Personal Information** dialog box, you can change your name, e-mail address, and the image that is used as your portrait throughout Sitecore.

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**.



3. In the **Regional and Language Settings** dialog box, you can:
   - Select the formats that you want to use for numbers, currencies, times, and dates.
   - 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.

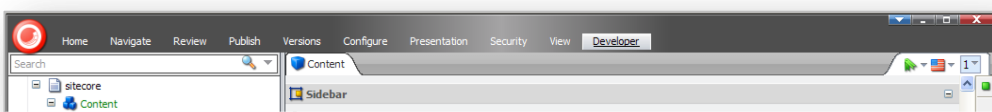
You can:

- 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.



   The ribbon is removed but the tabs are still displayed.

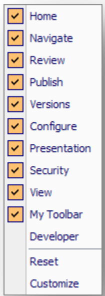
2. Click on a tab to open that tab and display the ribbon again.

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.



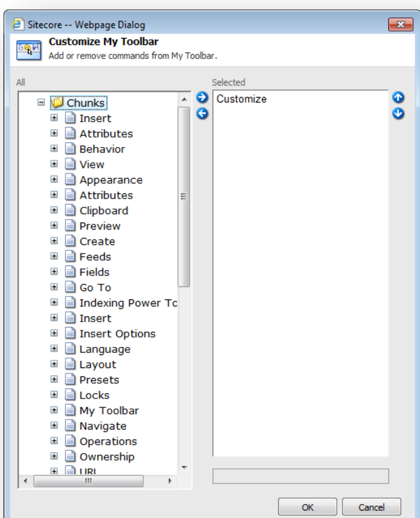
2. Select or clear the check boxes to decide which tabs you want displayed in the **Content Editor**.
3. Click reset to restore the default tab selection.

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.

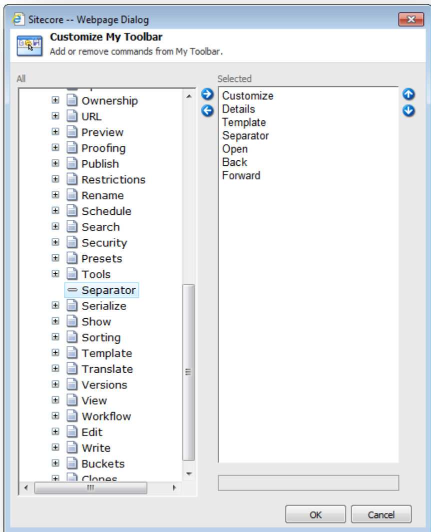
To create your own toolbar:

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.

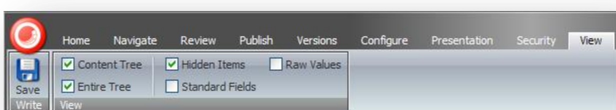
11.2.2 Customizing the Content Tree

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.



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

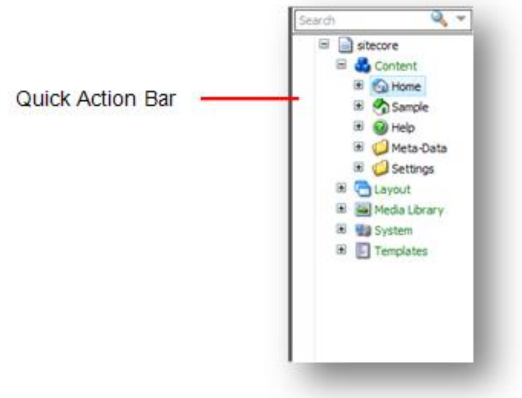
You can also resize the content tree. This can be useful when you need to find an item or when the pane takes up too much space.

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.

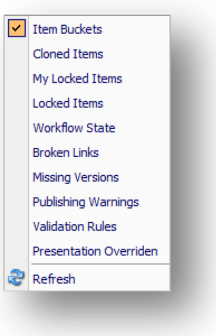
Configuring the Quick Action Bar

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.



To configure the Quick Action Bar:

1. Right-click the Quick Action Bar to see a list of the elements that it can display.



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.

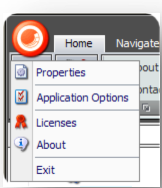
Important
The *Validation Rules* and *Broken Links* options are the most costly of the Quick Action Bar options. Each time you open an item in the content tree the client must make a server call to refresh these options.

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.

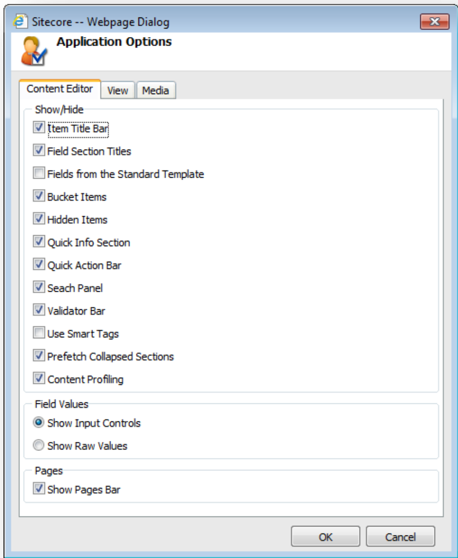
To configure the Content Editor:

1. In the **Content Editor**, click on the **Sitecore** button in the top left-hand corner.



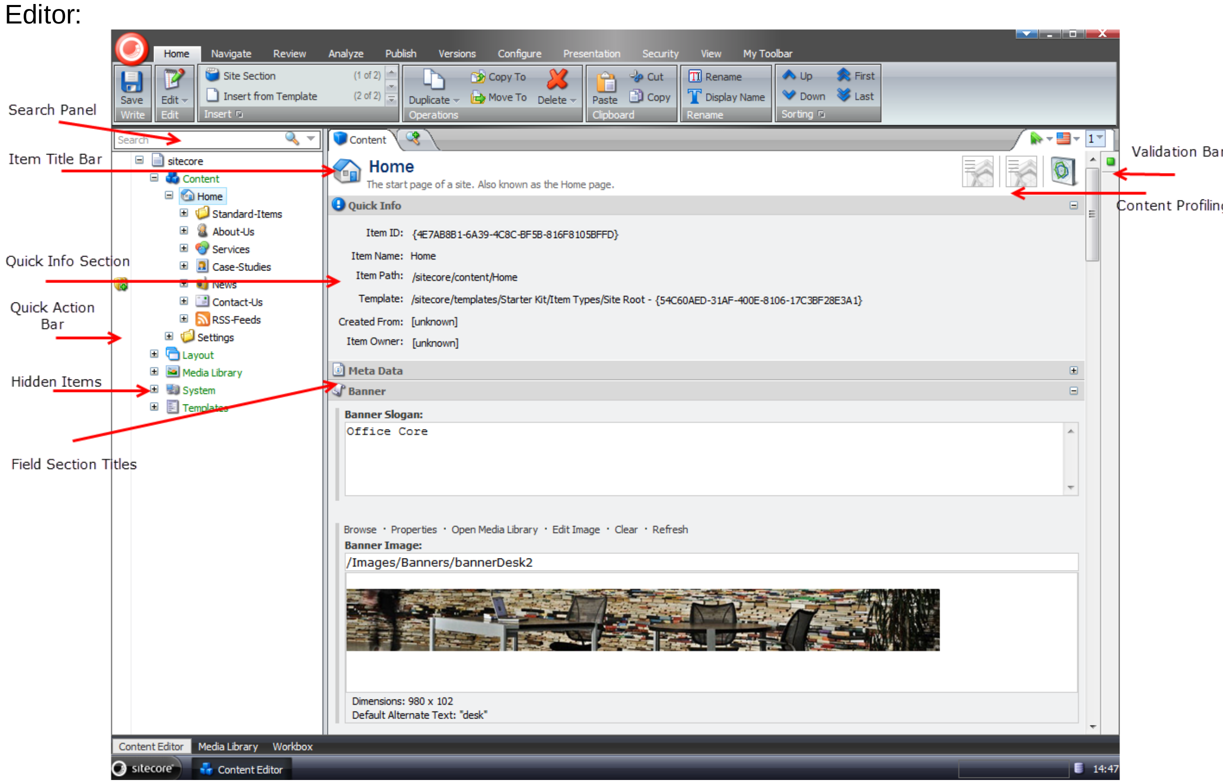
Alternatively, in the **Sitecore Desktop**, click the **Sitecore** menu and then click **Control Panel**, **Preferences**.

2. Click **Application Options** to open the **Application Options** dialog box.

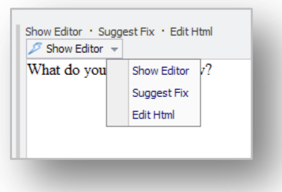


3. Select or clear any of the check boxes to hide or show the element in question.

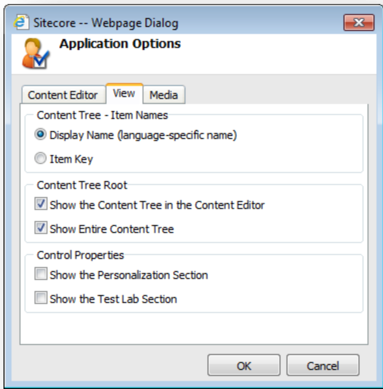
   The following screenshot points out where most of these elements are found in the Content Editor:



The remaining elements in the **Show/Hide** section are:

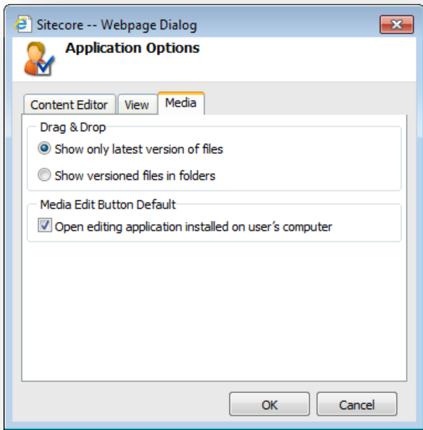
Section	Field	Description
Show/Hide	Bucket Items	Display the otherwise hidden items in an item bucket in a folder structure. It is recommended to clear this check box, because it will prevent the system from unnecessarily loading all the items in the content tree.
	Fields from the Standard Template	Display 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.
	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. 

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.

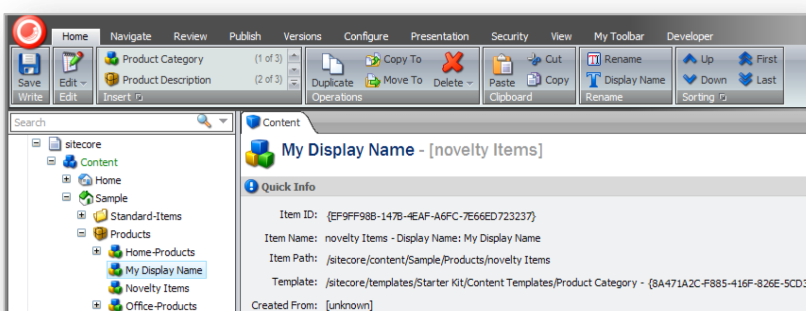


Section	Field	Description
Drag & Drop	Show only latest version of files	Select to show only the latest version of the media files in the Drag & Drop dialog box.
	Show versioned files in folders	Select to show all versions of a media file in the Drag & Drop dialog box.
Media Edit Button Default	Open editing 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

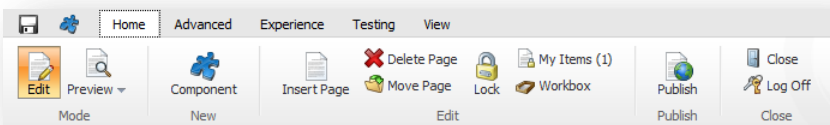
The functionality that is available to you in the Page Editor is determined by the roles that your site administrator has assigned to you.

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**.



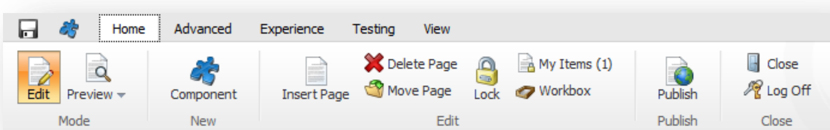
2. Click the **Toggle the ribbon** button at the top of the screen to hide the ribbon.
3. When you need to use the ribbon, click **Toggle the ribbon** button and it appears again.

Changing the Interface

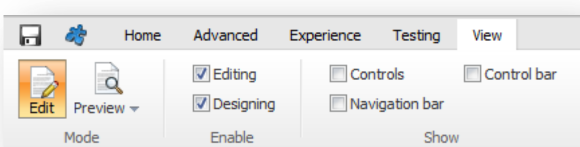
If you have access to more functionality in the Page Editor, you can also change the way the Page Editor presents editable items to you.

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.
   - 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.
   - To display the Navigation bar, select the **Navigation bar** check box.