

Sitecore CMS 6.0 or later Package Designer Guide

An administrator's guide to creating and editing Sitecore packages



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Chapter 1

Introduction

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

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

This document contains the following chapters:

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



Chapter 2

Creating a Package

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

This chapter contains the following sections:

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



2.1 Creating a New XML Project

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

To create a new XML project:

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

🎾 Package Designe	
	Save As Security Accounts Items Dynamically Files Dynamically Add
Metadata	General Info Package Name Author Version Publishing Publisher License 📝
	Documentation Comment

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

Field Name	Required or Optional	Description
License		
License 🝞		
Publishing Publisher		
2.0		
Version		
John		
Author		
Themes		
Package Name		
General Info		



Field Name	Required or Optional	Description
Package Name	Required	In this field, you enter the name for the package that you are going to create. The package name can contain letters, numbers, underscore, hyphen, figures, spaces and periods. If you enter an invalid symbol, an error message appears.
Author	Optional	In this field, you can specify the author of the package.
Version	Optional	In this field, you can specify the version of the package.
Publisher	Optional	In this field, you can specify the name of the publisher of the package.
License	Optional	In this field, you can enter information about the license to the package. Click to attach the license to the package.
Comment	Optional	In this field, you can write a comment about the package that you want to create.
Read me	Optional	In this field, you can specify information about the readme file to the package. Click Consert the readme file.
Post Step	Optional	In this field, you can specify any post installation steps to the package that you want to create. See section <i>Chapter 5 Administrator's Notes</i> for more information about how to specify the post step to be performed at the end of the installation process.
Custom Attributes	Optional	In this field, you can specify any other attributes of the package that you want to create.

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

B) Sitecore Webpage	-	23
Save project Enter a name for		_
	tie project nie.	
🍣 Refresh 🔞 Upload	🔿 Download 💥 Del	ete
File name: Thernes		
	Save	Cancel

5. In the **File name** field, enter the name for the new XML project and click **Save**.

Now you can add files, items, or security accounts and create the package.

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

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

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

- Dynamic (based on search criteria)
- Static.

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

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

Adding Items Dynamically

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

To add items dynamically to a source:

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



The Add Dynamic Source Item Wizard opens.



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



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

Select the item where you want to star	rt the search	ć
Database: master		~
Name	Description	^
🖃 📄 sitecore	This is the root of the Sitecore content tree.	
🖃 💑 content	Web site content.	
🖃 🚳 Home	Welcome to Sitecore.	
🗉 📄 Breaking news		
😑 📄 Colors		
Cyan		
📄 Magenta		
Red		
Green		
📄 Blue		
🗉 📄 FAQ		
🗉 📄 Knowledge Base		
📄 Login		
My Item		
Popular Downloads		
E ScrapBook		
	< Back Next > Cancel	-

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

Specify the filters that y				
Item name filter				
All or part of the item na	ame:		Clear Fil	ter
Use:	Simple Search	•		
Creation date filter				
Within the past		days	Clear Fil	ter
Specify dates	m	~		
To		~		L
Modification date filter				
Within the past		days	Clear Fil	ter
© Specify dates To	m	*		
Publish date filter				
Publish date:	~		Clear Fil	ter
🗹 Take workflow into a	account		L	
Template filter				
All	Selected		Clear Fil	ter
🗆 🗐 Templat	es 🕤		0	

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

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Section	Field	Description
Item name filter	All or part of the item name	Filter items by name or by a part of the name.
	Use	 Select a lookup option. The lookup options are: Simple Search Simple substring search, no wildcards, not case sensitive Regular Expression Common regular expressions and regular .NET expressions are allowed. For more information about regular .NET expressions, read the official Microsoft documentation. Wildcards Common wildcards are allowed. A question mark (? stands for a single character An asterisk (*) stands for an number of characters. Any other character is matched as is. Search is not case sensitive.
Creation date filter	Within the past … days	Filters items by the date they were created. Note The <i>Within the past XX days</i> function is just a UI convenience; this is not a floating date. When a user enters a number of days, this value is converted to a static date range.
	Specify dates	Filters items by the date they were created.
Modification date filter	Within the past … days	Filters items by the date they were modified. Note The <i>Within the past XX days</i> function is just a UI convenience; this is not a floating date. When a user enters a number of days, this value is converted to a static date range.



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

6. Click Next.

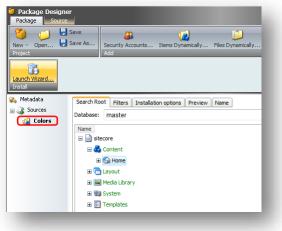
rce Name		~
Enter a name for the source	e. Click Add to add the dynamic item source.	6
Source name:		
Colours		
	< Back Add Car	ncel

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

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



Adding Files Dynamically

You can also add files dynamically to a source.

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

To add a dynamic file source:

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



The Add Dynamic Source Item Wizard opens.



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

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

elect Root Folder Select the folder where you want to start the search. Click Next to continue.	
sector and notice where you want to stall the search. Click Next to containde,	3
Website Website Website Wap_Browsers ApConfig Don Don Source Works Works	
< Back Next >	Cancel

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

Specify Source Specify the	Filters filters that you want to apply to the source. Click Next to continue.
File name fil	ter
All or part o	f the file name:
Ignore	filter for directory entries
Creation da	
Within	
Specify	dates
From To	¥
Modification	date filter
Within	the past days Clear Filter
Specify	dates
From	~

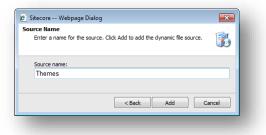
Section Name	Field Name	Description
Item name filter	All or part of the item name	Filters files by name or a part of the name.
Item name filter	Ignore filter for directory entries	Select the <i>Ignore filter for directory</i> <i>entries</i> checkbox if you don't want to include directories in the search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

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

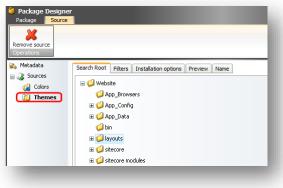
- 5. Fill in the fields with the filtering criteria that you want the **Package Designer** to use to filter the files of the selected folder.
- 6. Click Next.



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



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



Adding Items Statically

You can also add items statically to a source.

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

To add items statically to a source:

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



The Welcome to the Add Static Item Source Wizard opens.



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



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

🖉 Sitecore Webpage Dialog 📃	
Select Items Select the database and the items and subtrees that you want to include. Click Next to continue.)
Database: master 🗸	
Name Name	
Tetrahedron Triancie Add with some Add Item Selected items: single, master:/sitecore/content/Home/Shapes single, master:/sitecore/content/Home/Images	2
<back next=""> Cancel</back>]

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

rce Name Enter a name for the so	urce. Click Next to cor	ntinue.		
				~
Source name:				
Shapes				
			Next >	Cancel
		< Back		

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

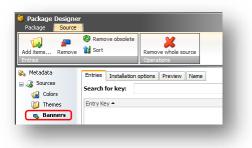
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10. Review the final screen and click **Finish**.

Sitecore Webpage Dialog	The static item source has been added successfully. Click Finish to close the wizard.	
R.		
	< Back Next > Finit	sh

The new static source is added:



Adding Files Statically

You can also add files statically to a source.

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

To add a file statically to a source:

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





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

🦲 Sitecore Webpage Dialog	
1	Welcome to the Add Static File Source Wizard.
	This wizard helps you:
	Select the directories and files to include in the source.
	 Specify the name of the source.
	Add the static file source.
	Always skip the first page of wizards
	< Back Next > Cancel

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

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

ect Root Folder	the search to start. Click Next to continue.	
Select the folder where you want	are search to start, click next to continue.	
Website App_Browsers	i 🕼 🖗 📢) ^
	App_Browsers App_Config bi	
Glayouts Glayouts	layouts sitecore sitec mod	
itecore_files) L
© upload ⊡ © xsl	xsi Default.aspx defaul	lt.css
Add path		Remove
Selected paths:		
	< Back Next >	Cancel

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

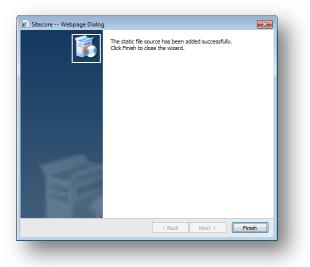
4. Click **Add path** to add all its subfolders and files to the source.



5. Click Next.

Irce Name Enter a name for the sourc	
Source name:	
Service files	
	Next > Cancel

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



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



Adding a Security Account to a Source

You can also add security accounts to a source.



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

To add a security account source:

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



The **Select Users** dialog box opens.

Select the users the	hat you want to include. Click Ne	ext to continue.	2
			Search:
Domain	Local Name	Full Name	Comment
			Page 1 of 0 (0 items
I4 4	Remove		



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

Sitecore Webpage Dialog	23
Select an Account	
Select a role or a user.	
Account Type	
Roles	
© Users	
0 03613	
Search:	
Role	
sitecore Analytics Content Profiling	
sitecore Analytics Maintaining	
sitecore Analytics Personalization	
sitecore \Analytics Reporting	
sitecore \Analytics Testing	
sitecore\Author	
sitecore \Designer	
sitecore \Developer	
sitecore \Sitecore Client Account Managing	
sitecore \Sitecore Client Authoring	
sitecore \Sitecore Client Configuring	
sitecore \Sitecore Client Designing	
sitecore \Sitecore Client Developing	
sitecore \Sitecore Client Maintaining	
sitecore \Sitecore Client Publishing	
	Page 1 of 2 (22 items)
ſ	OK Cancel
l	

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

Note

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

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

lect Users				_
Select the users t	hat you want to include. Click Nex	xt to continue.		2
				_
			Search:	
Domain	Local Name	Full Name	Comment	-
sitecore	sitecore \Sitecore Client (Configuring sitecore \Sitecore C	Client Con Role	
14 4]	- H	Page 1 of 1 (1 it	ems
	-			
Add	Remove			
			< Back Next > Cance	_

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

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

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To quickly add a role, double-click it.

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

	ect an Account			
Account				
Roles	rype			
Our Users				
			Sa	arch:
Domain	Local Name	Full Name	Email	Comment
default	anonymous	default\Anonymous		
extranet	🚨 Anonymous	extranet\Anonymous		
sitecore	a Admin	sitecore\Admin		Sitecore Administrator
14	•		M	Page 1 of 1 (3 items)

Note

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

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

Colored Realized Street	hat an an an the include . Cial Ma		(
select the users t	hat you want to include. Click Ne	xt to continue.	
			Search:
Domain	Local Name	Full Name	Comment
extranet	Anonymous	extranet\Anonymous	User
14]	→ ► ►	Page 1 of 1 (1 iter
	Remove		Page 1 of 1 (1 iter
Add	Remove		Page 1 of 1 (1 iter

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

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

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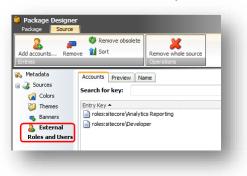


To quickly add the selected users, double-click the selected users.

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

Select Users	
Enter the name of the source	2
Source name:	
External Roles and Users	
	< Back Next > Cancel

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





2.2 Creating a ZIP Archive of an XML Project

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

To create a ZIP archive of a package:

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

	Welcome to the Build Package
	Wizard.
	This wizard helps you:
	 Enter a file name for the package.
	Build the package.
	 Download the package file.
1000	
	Always skip the first page of wizards
	< Back Next > Cancel

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

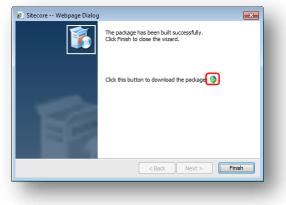
kage Name	-			
Enter a name for the pack	age. Click Next to	continue.		
Package name:				
Service Files Packag	e.zip			
		< Back	Next >	Cancel

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

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



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



2.3 **Previewing the Contents of a Package**

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

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

legenerate		
Preview		
arch for key:		🕨 Lookup
ntry Key 🔺	Source	Installation options
installer/version		Undefined
iles/files/	Useful Files	Undefined
files/files/code.txt	Useful Files	Undefined
files/files/colors.txt	Useful Files	Undefined
files/files/contract.doc	Useful Files	Undefined
files/files/diary.xml	Useful Files	Undefined
files/files/recent changes.txt	Useful Files	Undefined
items/master/sitecore/content/Home/Colors/Green/{B2FED519-AEAF-4ABF-A248-AA08B1D2CA1A}/en/1/xml	Colors	Undefined
items/master/sitecore/content/Home/Colors/Red/{7570162C-844E-4CF7-804E-2A4006FF05E1}/en/1/xml	Colors	Undefined
items/master/sitecore/content/Home/Popular Downloads/{FF15CA8E-2067-4DE9-9A6C-D70D30B61233}/en/1/xml	Shapes	Undefined
items/master/sitecore/content/Home/Shapes/{6683F9DF-17C6-47BB-B350-91DCA2C68590}/en/1/xml	Shapes	Undefined
items/master/sitecore/content/Home/Shapes/Circle/{3C4CE7A0-A095-4237-9AEC-8111053C3EB1}/en/1/xml	Shapes	Undefined
items/master/sitecore/content/Home/Shapes/Rhombus/{3298E700-C3CC-4102-A02B-7ECDF6447E5A}/en/1/xml	Shapes	Undefined
items/master/sitecore/content/Home/Shapes/Square/{B2567A54-B99D-4EFF-A3D7-F5FF5640F7A2}/en/1/xml	Shapes	Undefined
items/master/sitecore/content/Home/Shapes/Tetrahedron/{CB9AD1B9-F232-4DD2-8ABD-624176E7563F}/en/1/xml	Shapes	Undefined
items/master/sitecore/content/Home/Shapes/Triangle/{9B54372A-1699-416E-AABC-A95D8F0FB8CB}/en/1/xml	Shapes	Undefined
		>

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

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

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

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

A directory entry precedes any files in the directory.

A parent item precedes its descendants.

Item versions are grouped by item ID and language.



Chapter 3

Modifying a Package

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

This chapter contains the following chapters:

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



3.1 Modifying an Existing XML Project

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

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



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

	: Webpage oject	Dialog		23
	ect a project t	o open.		
2 Refres	h 🔞 Upload	🔿 Download ,	💢 Delete	
Themes.	ml			
				_
File name:				
		Open	Can	cel
le name:		Open	Can	cel

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

& Metadata ∃ 🌏 Sources 💩 security	General Info Package Name Themes
👞 Media Library	Author Version 1.0
	Publishing Publisher
	License 📝

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

Note

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

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3.1.1 Editing Dynamically Added Item Sources

You can edit the dynamical item sources that you created.

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

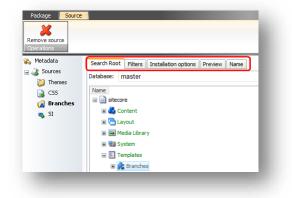
Remove source Operations	
Netadata Netadata Sources Themes SS Netadata SI SI	Search Root Filters Installation options Preview Name Database: master Name I installation options Preview Name Database: Content I installation options Preview Name I installatio options Preview Name I installation options Pr

Removing a Source

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

Editing the Source Items

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



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

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

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

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

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

Filters

Item name filter

All or part of the item name:		Clear Filter
Jse:	Simple Search 🗸	

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

All or part of the item na	ame:
Use:	Regular Expression
	Simple Search
Creation date filter	Regular Expression
Creation date filter	Wildcards

Simple Search

Simple substring search, no wildcards, not case sensitive.

Regular Expression

Common regular expressions and regular .NET expressions allowed.

For more information about regular .NET expressions, read the official Microsoft website.

Wildcards

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

Creation Date Filter

Within the past		days	Clear Filter
	From	~	
Specify dates	То	~	

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

Note

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

Modification Date Filter

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

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

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Publish Date Filter

Publish date:	v	Clear Filter
Take workflow into ac	rount	
	ounc	

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

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

Template Filter

	Selected	Clear Filter
 □ Templates ⊕ & Branches ⊕ Ommon ⊕ Common ⊕ Sample ⊕ System ⊕ User Defined 	0	0

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

Created by Filter

		Clear Filter
Add Remove		
Add Remove		

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

Updated by Filter

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



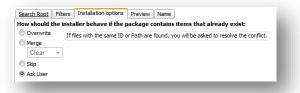
Language Filter

Danish German	Clear Filter	
English French (Canada)		
French (Canada)	×	

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

Installation Options

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



Field Name	Description
Overwrite	Items with the same ID (along with any existing children) are replaced by items from the package.
Merge	 When you merge items, you can choose between the following options: Specify behavior Sectify be
Skip	Items with the same ID from the target installation will remain unchanged; items from the package will be skipped.



Field Name	Description
Ask User (default)	A prompt window will appear if items with the same ID are found:
	🛽 Sitecore Webpage Dialog
	Item with the same id '{A7FBF2AB-02F1-48B0-80A3-88B6AB4944F0}' already exists in location '/stecore/content/home/Old Colors'. Choose the Overwrite option to remove the existing item and all of its subtems before proceeding. Choose the Merge option to merge the data from the package with the data of the existing item (without removing its subtems). Choose the Skip option to skip the item processing. Overwrite Overwrite Clear O skip Apply Apply to all

Preview

Entry Key Installation	options
items/master/sitecore/content/Home/Colors/Green/{B2FED519-AEAF-4ABF-A248-AA08B1D2CA1A}/en/1/xml Undefined	
items/master/sitecore/content/Home/Colors/Red/{7570162C-844E-4CF7-804E-2A4006FF05E1}/en/1/xml Undefined	

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

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

Entry Key 🔺					Installation op
items/master/sited	ore/content/Home/Co	lors/Green/{B2FED519-AE	AF-4ABF-A248-AA08B1D20	CA1A}/en/1/xml	Undefined

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

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

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

Note

Wildcards are not allowed.

3.1.2 Editing Dynamically Added File Sources

You can edit the dynamic file sources that you created.



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

Remove source Operations	
Metadata Jources Themes CS5 M Branches SI	Search Root Filters Installation options Preview Name

Removing the Source

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

Editing the Source Files

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

Package Source Remove source Operations	
Metadata Sources Themes CSS SI SI	Search Root Filters Installation options Preview Name

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

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

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

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

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



Filters

File name filter

or part of the file name:	
or part of the file fidiner	Clear Filt
	Cicarria
Ignore filter for directory entries	

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

Creation Date Filter

Within the past	days Clear Filter
Specify dates	
From	~
То	~

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

Note

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

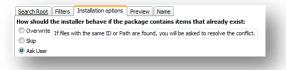
Modification Date Filter

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

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

Installation Options

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



Field Name	Description
Overwrite	The file in the target installation is replaced by a file from the package.
Skip	The file in the target installation remains unchanged; the file in the package is skipped.



Field Name	Description
Ask User (default)	A dialog box appears if identical files are found.

Preview

earch Root Filters Installation	n options Preview Name	
earch for key:		Lookup
Entry Key 🔺	Installation options	
📆 files/files/	Undefined	
files/files/code.txt	Undefined	
files/files/colors.txt	Undefined	
files/files/contract.doc	Undefined	
📷 files/files/diary.xml	Undefined	
files/files/recent changes.txt	Undefined	

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

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

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

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

Note

For this search, wildcards are not allowed.

3.1.3 Editing Statically Added Item Source

You can edit the static item sources that you created.



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

Add items Remove	 Remove obsolete Sort 	Remove whole source Operations	
‰ Metadata ∋ 🌛 Sources ਯੂ≏ Colors	Entries Installation of Search for key:	pptions Preview Name	
्युः Shapes	/master/sitecore/	content/Home/Shapes/{6683F9DF-17	F15CA8E-2067-4DE9-9A6C-D70D30861233}/invariant/0 7C6-4788-8350-91DCA2C68590}/invariant/0 7A0-A095-4237-9AEC-8111053C3E81}/invariant/0
	master (sitecore (content/Home/Shapes,Rhombud/ (32982700-C3CC-4102-A028-7ECDF647E5A)/nvviant/0 master (sitecore (content/Home/Shapes,Ribombud/ (32957A54-9990-4EFF-4307-F5FF5647FA2)/nvviant/0 master (sitecore (content/Home/Shapes,Ribombud/(C69A01B9F232-4002-8480-62176E7537)/nvviant/0		
	master/sitecore/content/Home/Shapes/Triangle/(9854372A-1699-416E-AABC-A95D8F0FB8CB)/Invariant/0		

Removing the Source

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

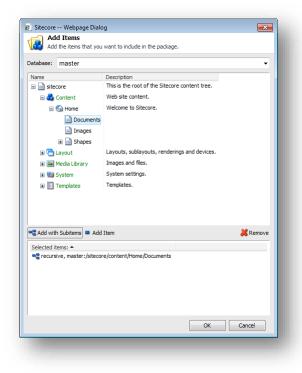
Editing the Source Items

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

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

Adding Items

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



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



Removing items

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

Removing obsolete items

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

Setting Installation Options

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

Renaming the source

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

3.1.4 Editing a Static File Source

You can edit the static file sources that you created.

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



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



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

Website Ø App_Browsers				Â
↓ App_browsers ★ Ø App_Config	App_Browsers	App_Config	bin	
🥵 bin				
⊕ layouts ⊕ sitecore	layouts	sitecore	sitecore modules	=
🗉 🥥 temp	sitecore_files	temp	upload	
💋 upload 🗉 💋 xsl			6	
1 V XSI	xsl	Default.aspx	default.css	
		3		
	default.htm	default.js	Design.config	
Add File	_	9	× R	emove
Selected paths:				

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

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

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

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

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

3.1.5 Editing a Security Account Source

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

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

dd accounts Remove 🛍	Sort Cperations
Metadata Cources Cources Action Actio	Accounts Preview Name Search for key:
Users	Entry Key

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



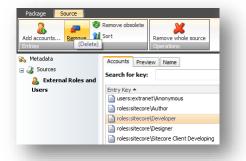
To add an account to the source, click Add account to open the Select an account dialog box.

Select an Account Select a role or a user.	
Account Type	
Roles Roles	
O Users	
	Search:
Role	
sitecore\Analytics Content Profiling	
sitecore \Analytics Maintaining	
sitecore Analytics Personalization	
sitecore (Analytics Reporting	
sitecore\Analytics Testing	
sitecore\Author	
sitecore\Designer	
sitecore\Developer	
sitecore \Sitecore Client Account Managing	
sitecore\Sitecore Client Authoring	
sitecore\Sitecore Client Configuring	
sitecore\Sitecore Client Designing	
sitecore \Sitecore Client Developing	
sitecore \Sitecore Client Maintaining	
sitecore \Sitecore Client Publishing	
	Page 1 of 2 (22 items)
	OK Cancel

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

To remove a role or a user from the source:

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



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

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

Previewing the security accounts

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



3.2 Modifying an Existing ZIP Package

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

To modify an existing ZIP package:

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



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

Sitecore We Package Select a pa		×
🤁 Refresh 🔞 U	Ipload 🌖 Download 💥 De	lete
Themes 2- 2.0.zip	Themes- 1.0.zip	
ile name:		
	Open	Cancel

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



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



Note

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



Chapter 4 Installing a Sitecore Package

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

The chapter consists of the following sections:

• Installing a Package



4.1 Installing a Package

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

To install the package:

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

🐞 Installation Wizard	
Select Package	~
Select a package to install.	5
Enter the name of the package:	
Click Browse to locate the package on the server. Click Uploa upload the package. Browse Upload	i to
< Back Next >	Cancel

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





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



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

🐞 Installation Wi	zard
Ready to install. The wizard is not	w ready to install the package. Click the Next button to begin.
Package name:	The new colors
Version:	1.0
Author:	ALL
Publisher:	ALL
	< Back Install Cancel

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



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

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Note

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

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

🐞 Installation Wizard	
	The wizard has completed.
R	Restart the Sitecore client.
	< Back Next > Finish
1100	

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

Note

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



Chapter 5

Administrator's Notes

This section contains some notes concerning Package Designer functionality.

Package folder location

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

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

System Items

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

Special Characters

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

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

Specifying the Post Step

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

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

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

For example: MyCompany.CustomPostStepAction, MyAssembly

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

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

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

public void Run(ITaskOutput output, NameValueCollection metaData);

Parameters:

o output

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Type: Sitecore.Install.Framework.ITaskOutput

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

o metadata

Type: System.Collections.Specialized.NameValueCollection

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

2. Implement a method that will perform post step action with the following signature: public void RunPostStep()