Sitecore CMS 6.4

Content Author's Reference and Cookbook

A Conceptual Overview and Practical Guide to Using Sitecore

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Chapter 1

Introduction

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

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

This Content Author's Cookbook contains the following chapters:

- **Chapter 1 — Introduction**
  This chapter is a description of the content, aims, and the intended audience of this manual.
- **Chapter 2 — Sitecore**
  An introduction to some 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 creating several versions of the same item as well as creating different language versions of the same item.
- **Chapter 6 — The Media Library**
  Step by step instructions for using the Media Library.
- **Chapter 7 — RSS Feeds**
  Step by step instructions for creating RSS feeds.
- **Chapter 8 — Workflows for Content Editors**
  Step by step instructions for creating and using workflows.

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- **Chapter 9 — Customizing the Interface**
  Step by step instructions for publishing content on your website.

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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

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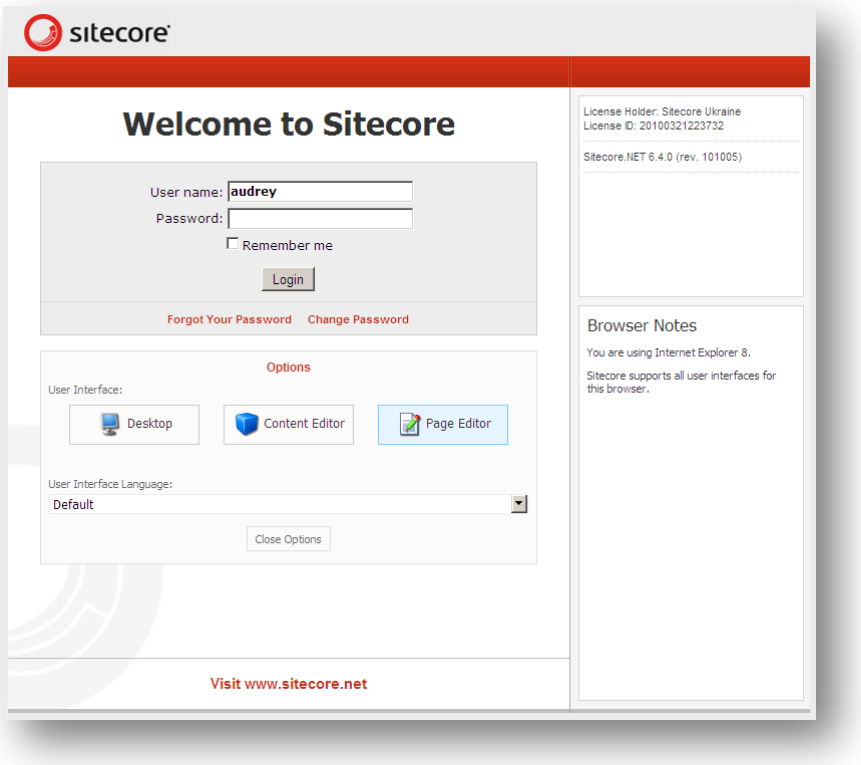
2.1 Logging In

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 task you want to perform, enter your user name, password, and click **Log in** to log in and start editing the website.
3. Select the User Interface that you want to use, enter your user name, password, and click **Log in** to log in and start editing the website.

Note
In this manual, we use the Sitecore Training Sample Site as our demonstration site.

Configuring Sitecore on Internet Explorer

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

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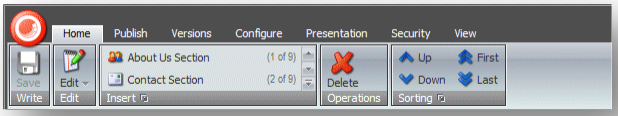
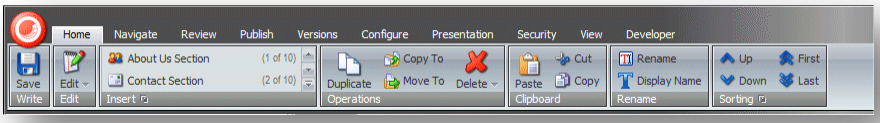
2.2 Roles and Functionality

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.

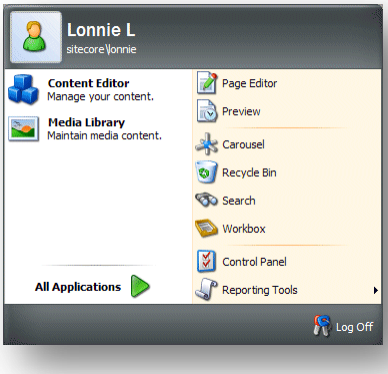
For example, a user who has been assigned one set of roles may see the following ribbon in the Content Editor:

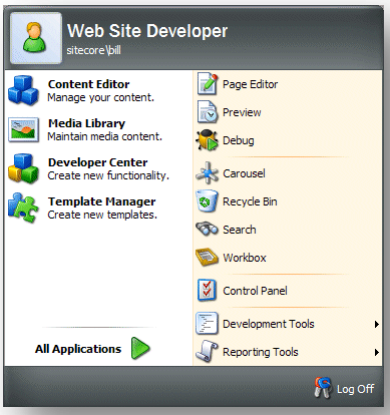


While a user who has been assigned another set of roles may see much more functionality in the **Content Editor** ribbon:



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:





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2.3 Item Locking

Sitecore uses item locking to ensure that two different users cannot edit the same item at the same time. If two or more users manage to edit the same item simultaneously, only the changes that were made by the user who clicks **Save** last will be available. All the other changes will be lost.

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 in the Page Editor

In the Page Editor, the way that item locking works depends on the access rights that you have been assigned.

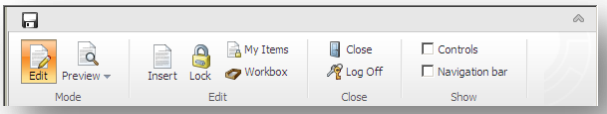
Minimal Page Editor

If you only have access to the *Minimal Page Editor*, you do not have access to the ribbon and 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.

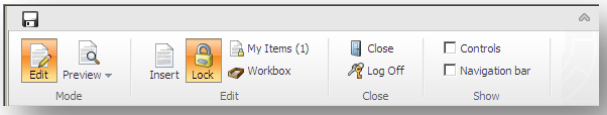
Limited Page Editor

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, you must remember to unlock it so that other users can edit it.

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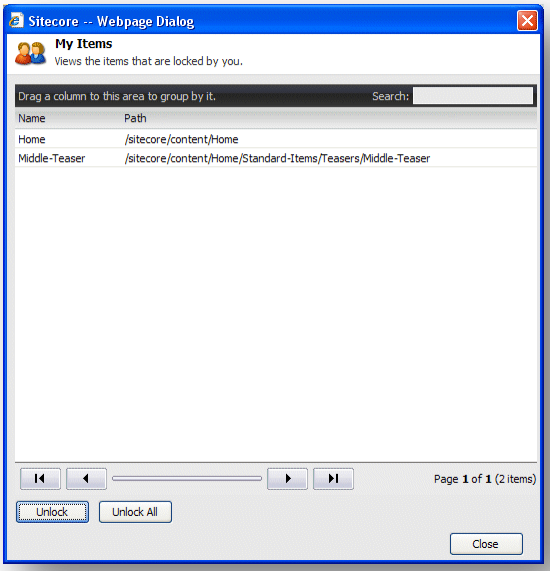
Unlocking Items

You must remember to unlock items that you have locked. To unlock an item, select the item and click **Lock**. If you have locked and edited numerous items, you can easily lose track of them all. To see which items are still locked by you, in the **Edit** group, click **My Items**:



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

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

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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.

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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
- Creating a New Item in the Page Editor
- Deleting Content

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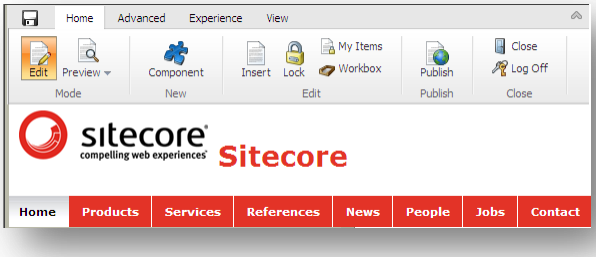
3.1 The Page Editor

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.

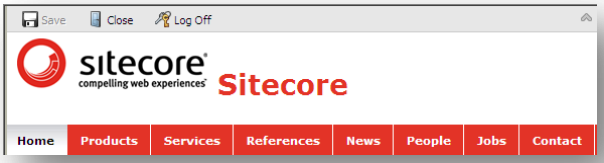
With this mind, Sitecore CMS allows content authors to edit and create items directly on the web page with the Page Editor. The Page Editor is the simplest of the editing tools that Sitecore provides. It is designed for inexperienced content editors who edit and write content items directly on the page.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

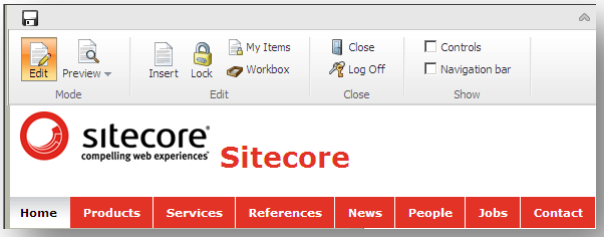
When you log in to the Page Editor, the ribbon is displayed at the top of the web page:



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



If you have been given more access rights, you might be able to use a ribbon of commands. The ribbon that you are presented with could look something like this:



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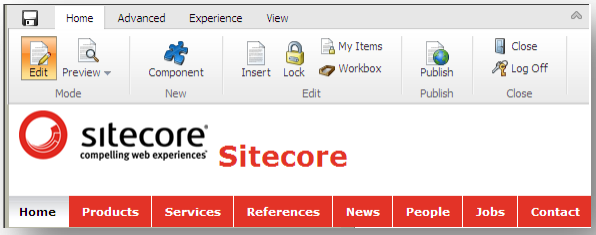
Regardless of the ribbon that you use, there is always a **Save** button in the top-left corner.

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.

If you have been given full access to the all the functionality contained in the Page Editor, you will be able to use all the tabs in this ribbon:



This ribbon consists of four tabs, each with its own collection of commands.

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3.2 Editing an Item in the Page Editor

The Page Editor has been 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 makes it easier for 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:

Note
In all of the procedures described in this manual, we use the Sitecore Training Sample Site as the demonstration website.

3.2.1 Editing a Simple Text Field

To edit a simple text field:

1. Log on to the **Page Editor**.
2. Navigate to the item that you want to edit.

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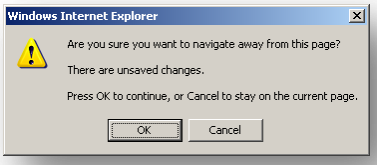
3. In the item, select a simple text field that you want to edit.

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:



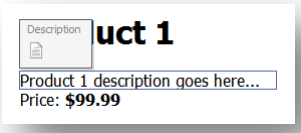
3.2.2 Editing a Rich Text Field

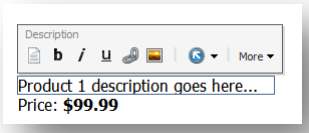
A rich text field gives you more control over how the text appears on the web page.

To edit a rich text field:

1. Select a rich text field and Sitecore displays some extra options.

   Depending on your installation, the options can vary:





   You can either edit the text directly on the page or in the **Rich Text Editor**.

   To edit the text directly on the page, just click the line where you want to edit it and start typing. To edit the text in the **Rich Text Editor**, click the **Edit Text** button .

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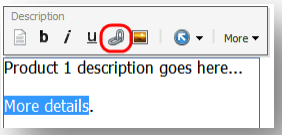
2. When you edit a rich text field directly on the page, you can not only edit the text but also format it. You can make the text bold, italic, and underlined.

You can also insert a link or an image into the item.

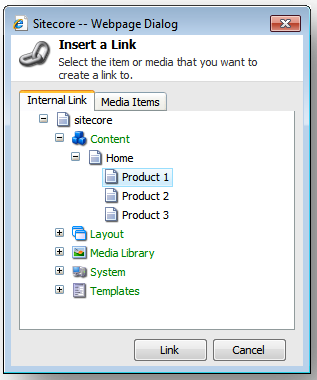
Inserting a Link

To insert a link into a rich text field:

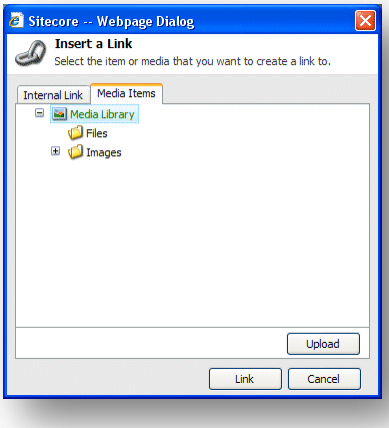
1. Click the **Link** button .



Sitecore opens the **Insert a Link** dialog box.



2. In the **Insert a Link** dialog box, expand the content tree and select the item that you want to create a link to.
3. Click **Link** to create the link.
4. If the item that you want to link to is an image or media file, click the **Media Items** tab.



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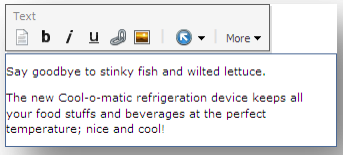
5. Expand the content tree and select the media item that you want to link to.
6. Click **Link** to create the link.

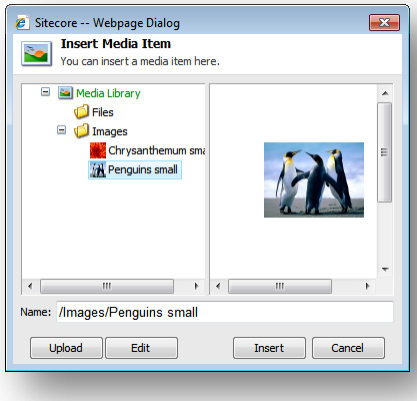
Inserting an Image

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

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



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



2. Expand the content tree and select the image or media item that you want to insert.

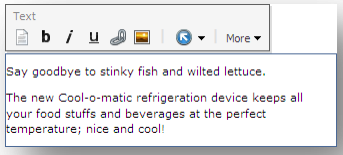
   You can insert various types of media into the item. These could be animations, film clips, sound files, and so on.
3. Click **Insert** to insert the image into the rich text field.

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 .



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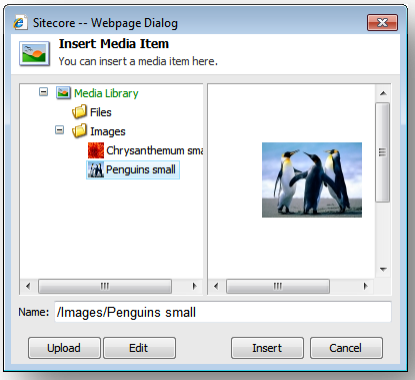
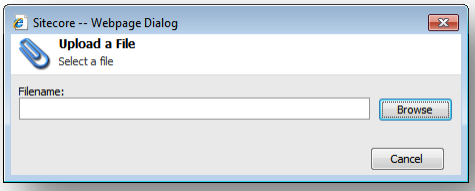
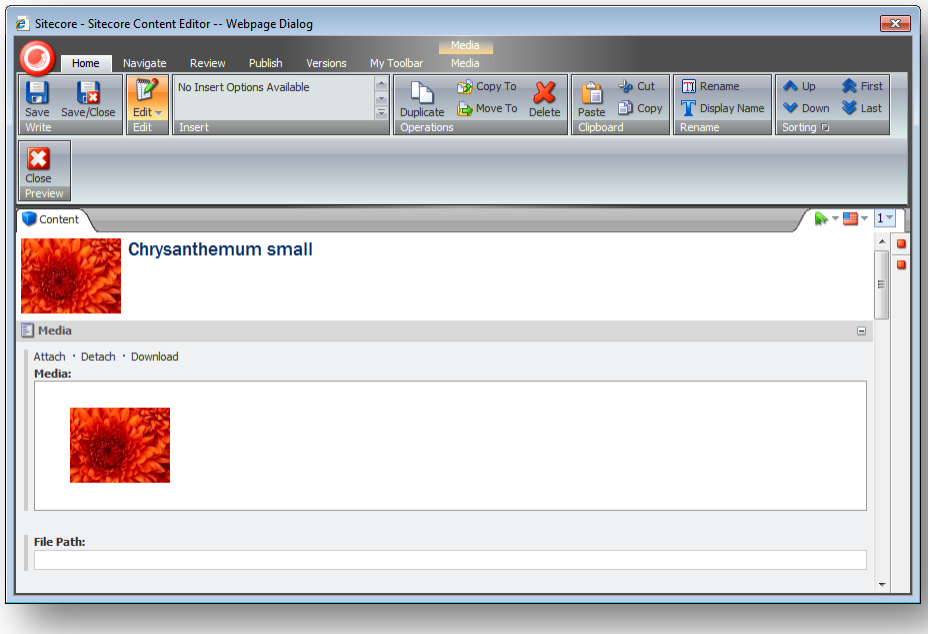
Sitecore opens the **Insert Media Item** dialog box.



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**. Sitecore starts the **Content Editor** dialog box. In this dialog box, you must lock the image (like any other item you edit) and save it.



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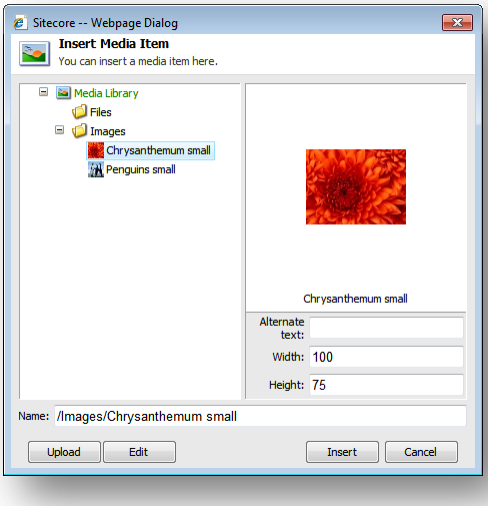
4. After you click **Save/Close**, the media item is uploaded to the **Sitecore Media Library**.

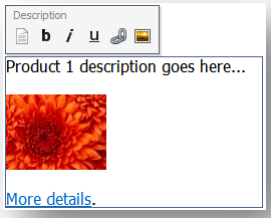


When the media file is available in the Media Library, you can create a link to it or use it to illustrate your website.

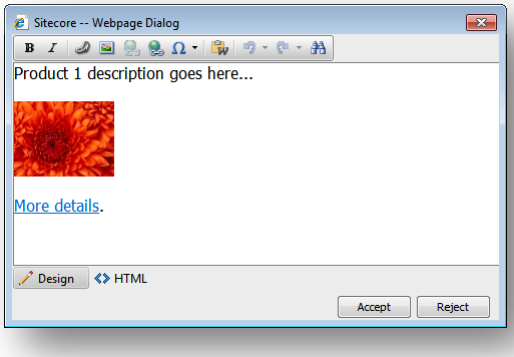
3.2.3 Editing a Rich Text Field in the Rich Text Editor

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. You can now edit the item in this window.

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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.
- Undo and Redo the actions you did before.

4. When you are finished editing the item in the **Rich Text Editor**, click **Accept** to save your changes.

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.

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.

For more information about using the Rich Text Editor, see *Chapter 5, The Rich Text Editor*.

3.2.4 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.

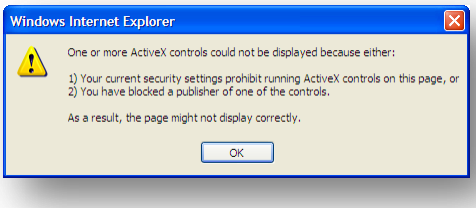
You can edit Word fields in the Page Editor.

Important
You must have Microsoft Word 2007 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.

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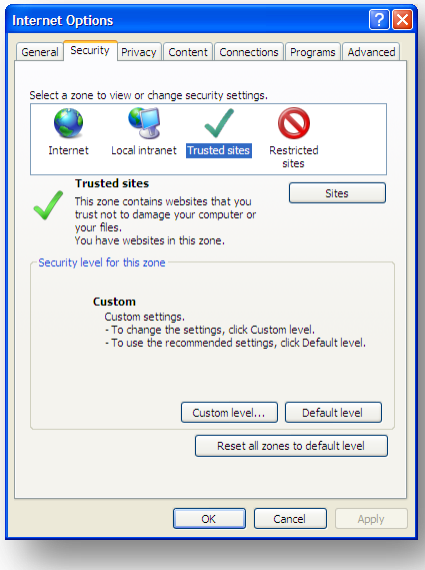
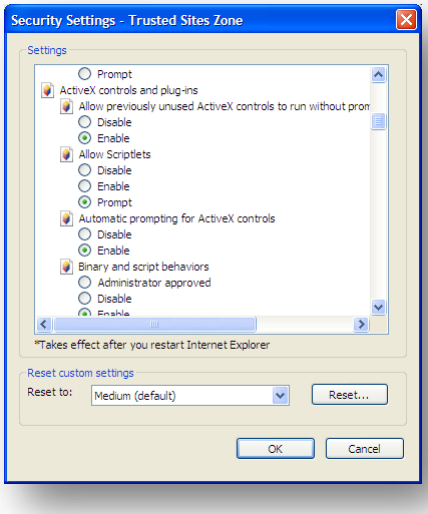
To configure Internet Explorer to support the Word fields:

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.

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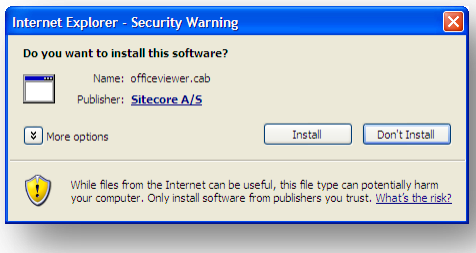
Now when you access a Word field in Sitecore, you are prompted to install an ActiveX component.



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

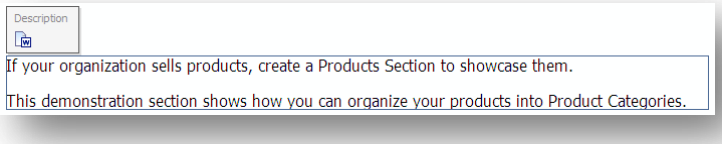
   When the component is installed, you can edit the field in Word.

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

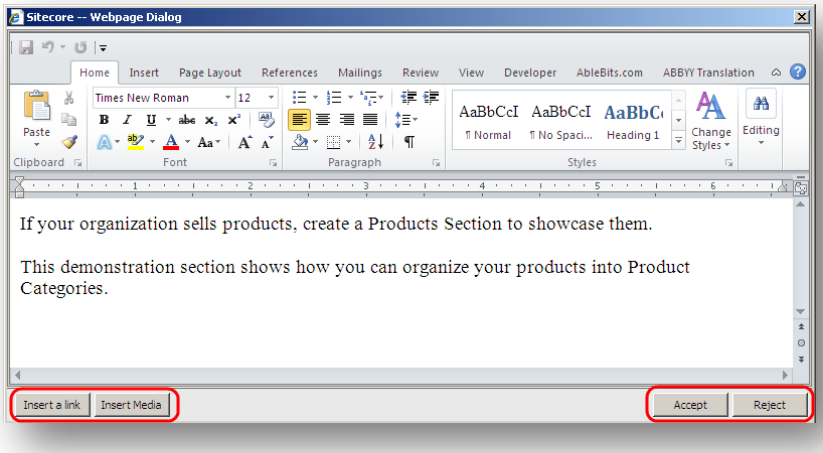
Editing a Word Field

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** to open a new window that displays the content of this field in Word.



   You have access to all the functionality that Word contains.

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

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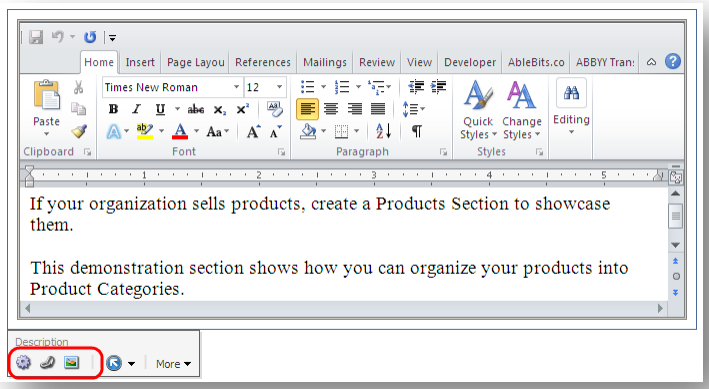
4. To insert an image from the Media Library, click **Insert Media**.
5. To insert an image that is not in the Media Library, use Word's functionality.

   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.
7. To close the window without saving your changes, click **Reject**.
8. In the **Page Editor**, save your changes and unlock the item.

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

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.

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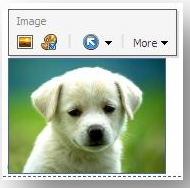
3.2.5 Editing a Graphical Item

You can also use the Page Editor to edit any graphic items that are displayed on the website. When you select an image, you are presented with some additional options:



You can:

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

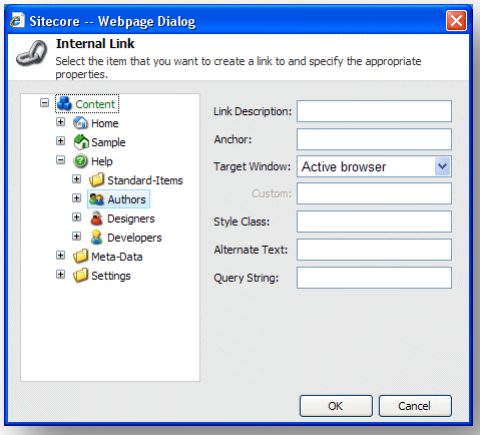
The options that are available to you can vary from installation to installation.

Editing the Link in an Image

Note
Only the images placed in Rich Text and Word fields can have links.

To edit the link in an image:

1. If the picture is a link, click **Edit Link**:



2. In the left-hand pane of the **Internal Link** dialog box, select the item that the link opens.

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

3. The **Internal Link** dialog box contains the following fields:

Field	Value
Link Description	A description of the link.

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Field	Value
Anchor	The name of the anchor on the page that you want to link to. The browser will scroll directly to this point on the page.
Target Window	Here you specify whether the link should use the same browser window, another browser window, or a custom window.
Custom	If you select Custom in the target Window field, you specify the custom window here.
Style Class	The style class that you want to use.
Alternate Text	An alternative text that will be displayed when you move the mouse over the image.
Query String	A query that will be added to the link.

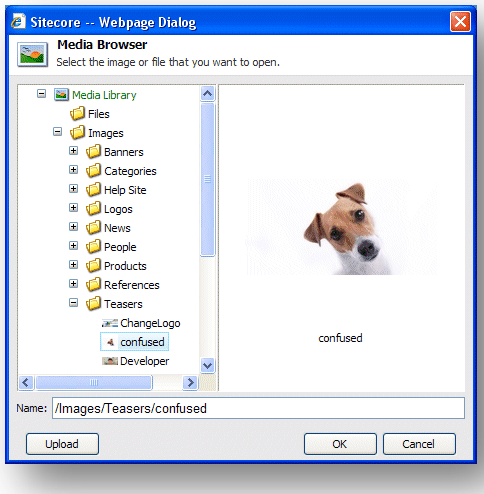
4. Fill in the fields with the appropriate information.

Changing the Image

Changing the image varies depending on the field type.

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

1. In the **Page Editor**, select the image that you want to change.
2. Click **Choose an Image** to open the **Media Browser** dialog box:



The **Media Browser** dialog box lets you view all of the items that are currently available in the Sitecore Media Library.

3. Select the image that you want to use and click **OK**.

   This new image is inserted into the current item.

4. In the **Page Editor**, click **Save** to save the changes, **Save & Close** to save the changes and exit edit mode, or **Close** to close the item and exit edit mode without saving the changes.

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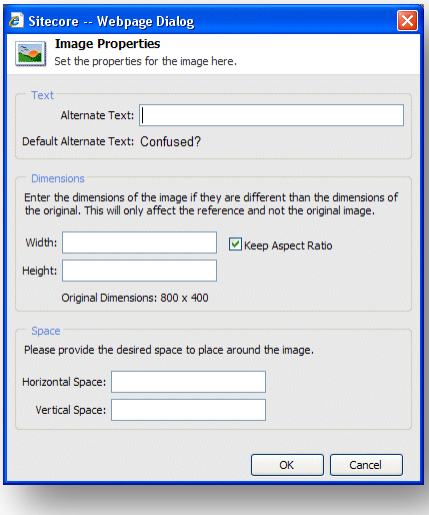
Modifying the Image Appearance

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 how much space should be placed around the image.

3.2.6 Previewing Pages

You can preview the website without publishing. 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 displayed for different devices.

To preview a page:

1. In the **Page Editor**, on the **Mode** chunk, click **Preview**.
2. On the **Experience** tab, select preview parameters. This tab might not be available to you if you don’t have enough security permissions.

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3. Navigate your website and see how the pages look.

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3.3 Creating a New Item in the Page Editor

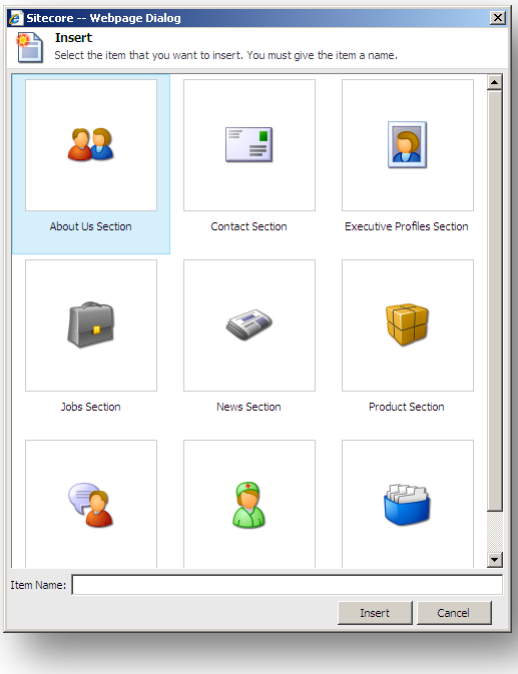
As a content author, you not only edit content but you also create new content items and insert them into the web page where you want them displayed.

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.

3.3.1 Inserting Items

You can insert new items in the Page Editor. To insert a new item onto the page:

1. Navigate to the page that you want to edit.
2. Click the **Edit** button at the top of the page.
3. Click **Insert** to open the **Insert** 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.

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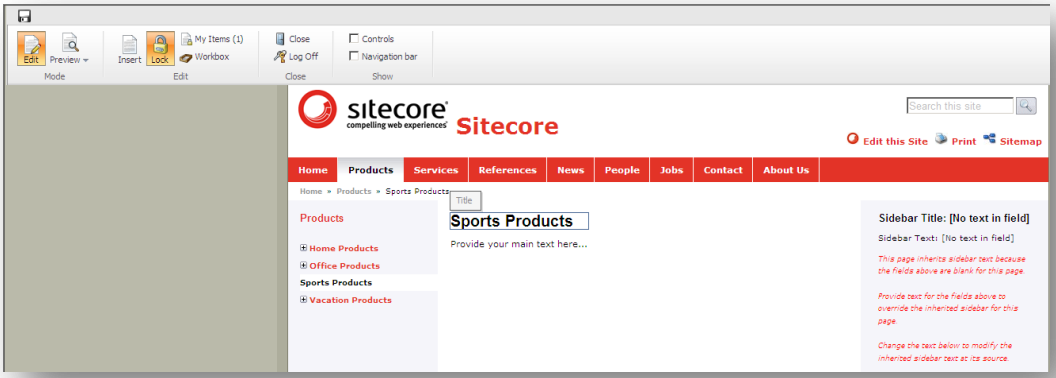
6. Click **Insert** to create the new section and a section is added to the website:



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. You can now edit the item that you have inserted by adding text, images, sidebar text, and so on.

When you are finished editing the new item, you must unlock it. For more information about unlocking items, read the *Unlocking Items* section.

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3.4 Deleting Content

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

3.4.1 Deleting an Item

To delete an item from the website:

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

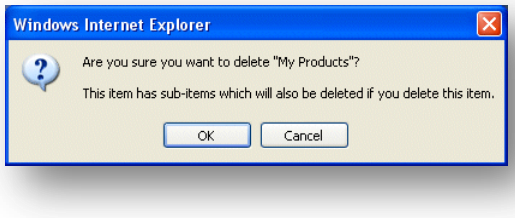
   If you want to delete an item, navigate to that item.

   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. Click **Delete** 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 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 will appear informing you that that the section contains subitems and that these items will be deleted along with the section.



   If you want to save any of the items, you must move them to another section.

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

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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

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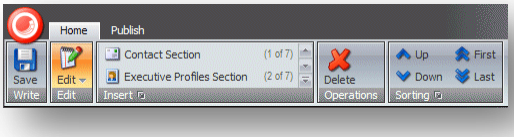
4.1 The Content Editor

The Content Editor has been designed for more experienced content authors who feel comfortable working with a computer, Microsoft Word, and are familiar with Sitecore and the functionality that it contains.

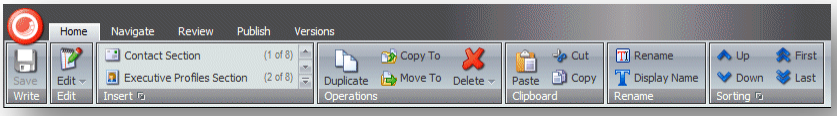
The Content Editor is a large application but its appearance and the functionality that it contains varies depending on the roles that have been assigned to the user, the local security settings and the amount of customizations that have been carried out on your installation.

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

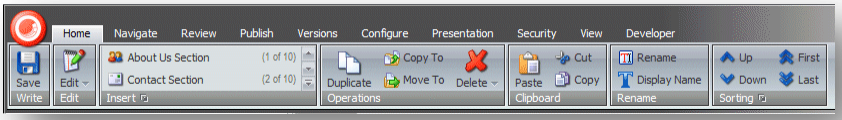
The functionality that you have access to in the Content Editor can vary greatly. As a minimum you can expect to see:



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.

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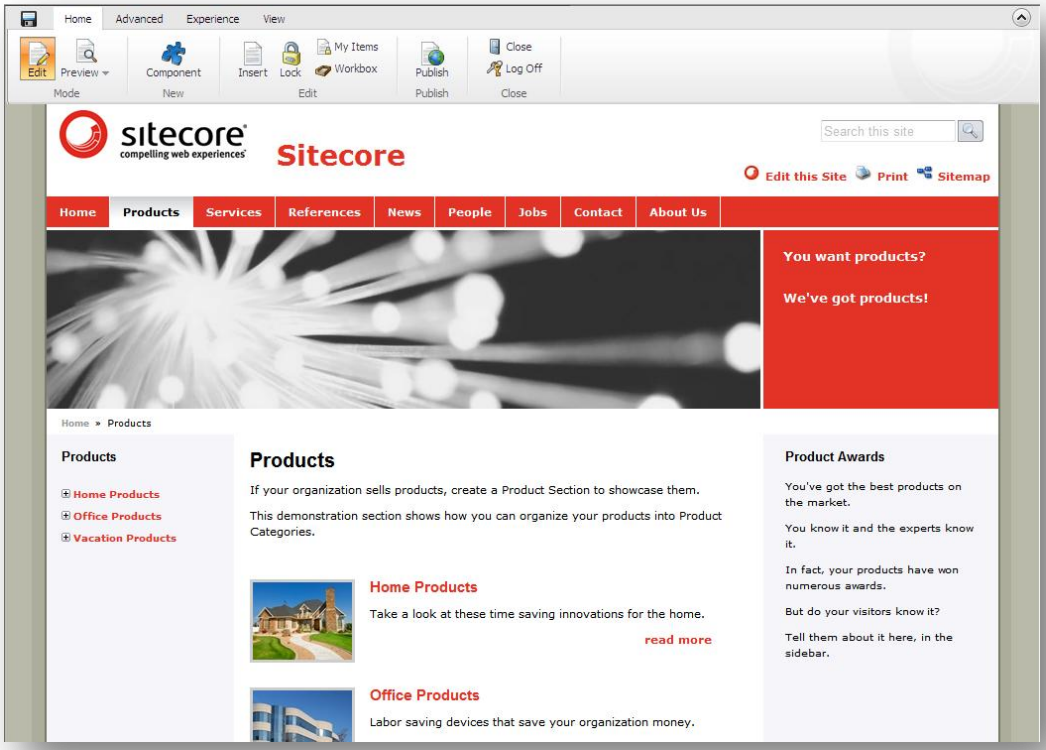
For example, the *Products* section of the sample website looks like this in the Page Editor:



You can edit all of the items that appear on the page — text, graphics, logos, links, and so on.

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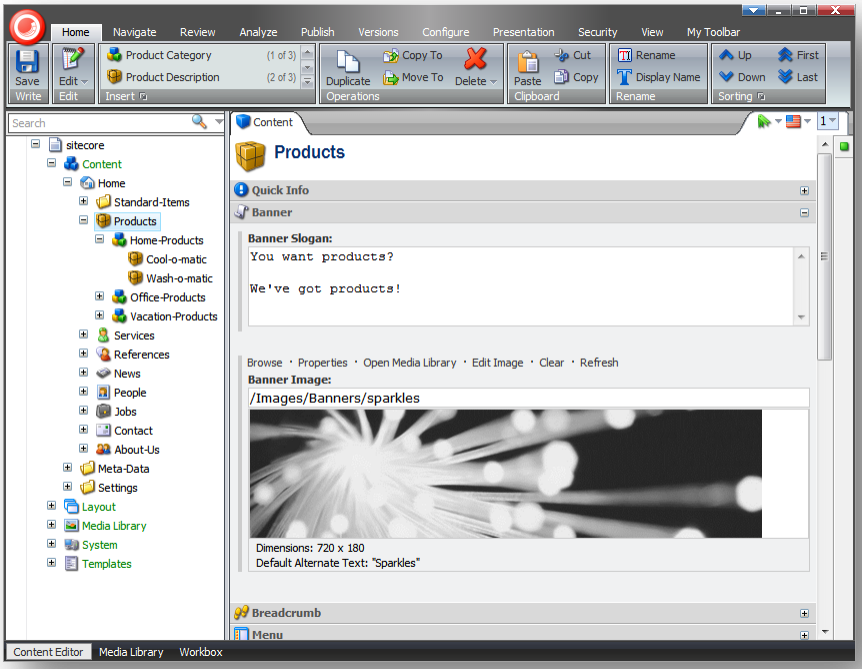
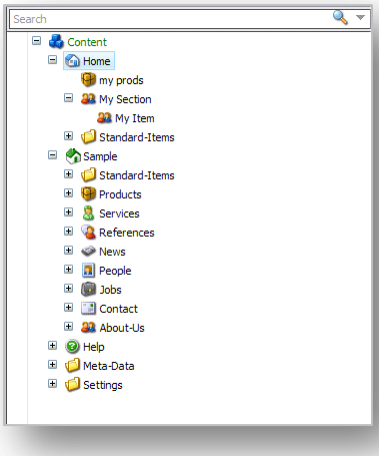
When you open the *Products* section in the Content Editor, it looks like this:



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 *Products* item, the *Home-Products* 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 it uses to present all the items that have been created for the website.



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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 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.

Searching in the Content Tree

There is a search function associated with the Sitecore content tree. This helps you find items quickly and can be particularly useful in very large websites and in sites that you are unfamiliar with.

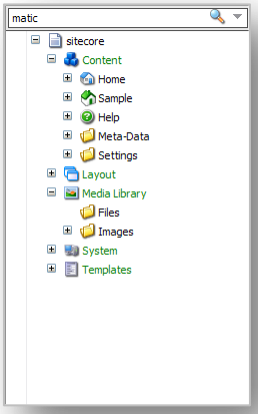
To search for an object:

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

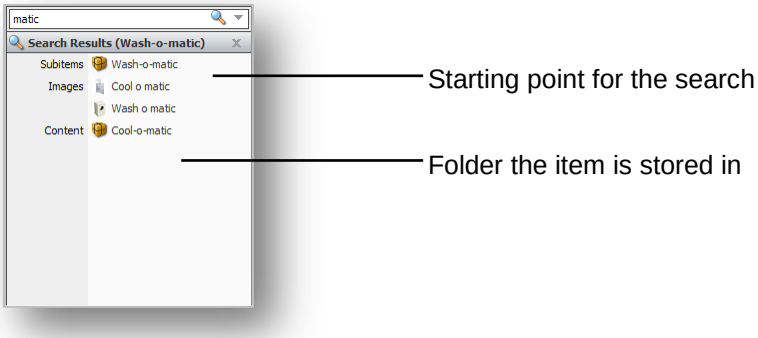
   The Sitecore search engine searches the entire content tree. However, the search results list the items that are found after this starting point above the items that are found before this starting point.

   The Sitecore search engine does not support wildcards.

2. In the **Search** field, enter the value 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 and the results are displayed.



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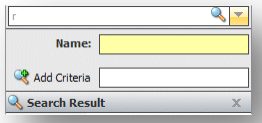
Adding an Extra Criteria

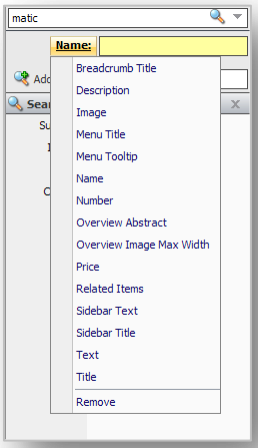
Sometimes you might need to refine your search by entering extra criteria.

To add extra criteria to your search:

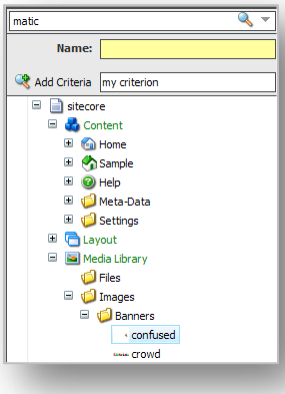
1. Click the drop-down arrow to open an extra pane:



2. If you want to search for an object by its name, enter the value in the **Name** field.
3. 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.



4. To add an extra criterion, in the **Add Criteria** field, enter the name of the criteria.



5. Click **Add Criteria** to add the new criterion to the list.
6. You can then click the name of the new criteria and select a field name from the list that appears.

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The results of the search are displayed in the **Search Results** pane. The items that were found below the current item are displayed first.

Removing the Extra Criteria

To remove the extra criterion, click the criterion you want to remove and then click **Remove** at the bottom of the menu that appears.

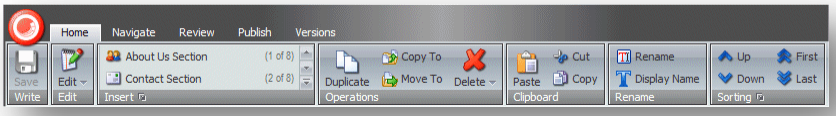
4.1.3 Locking in the Content Editor

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

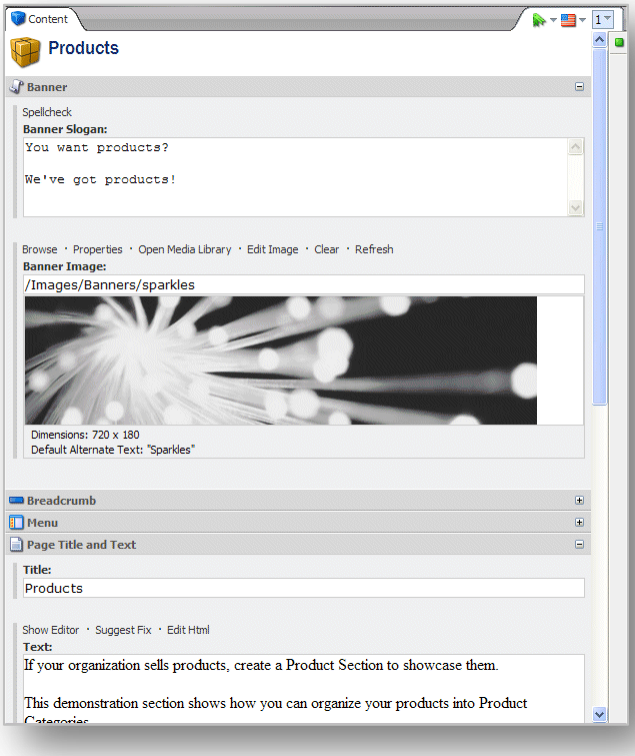
Locking an Item

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.



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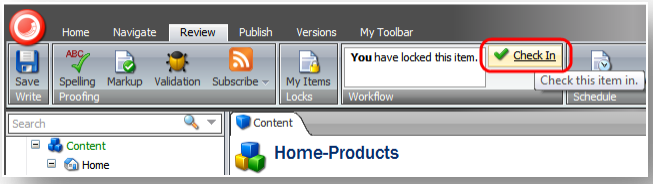
You can now start editing the item.

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.



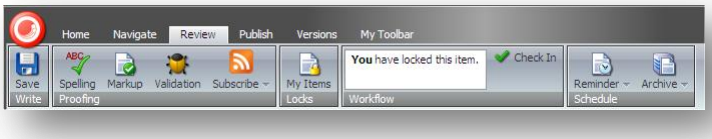
Unlocking Multiple Items

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.



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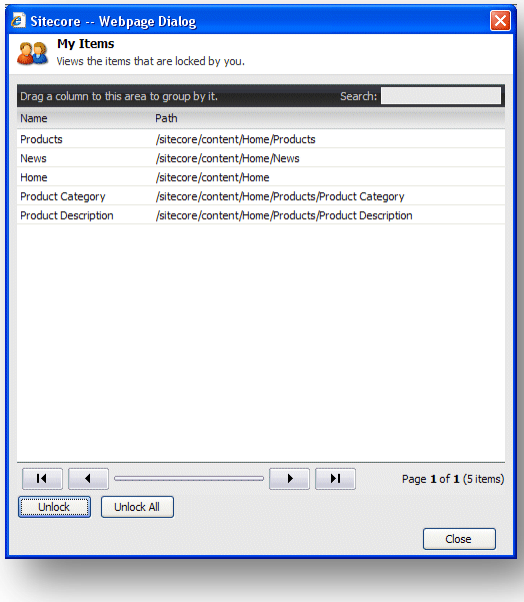
2. In the **Locks** group, click **My Items**:



   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.

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4.2 Editing an Item in the Content Editor

Experienced content authors 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.

Note
You must lock an item before you can edit it in the Content Editor.

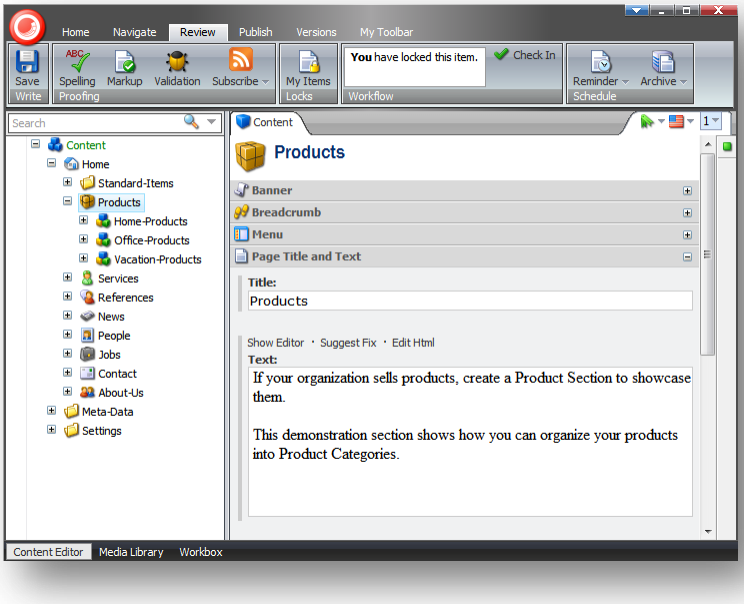
In all the procedures and tasks described in this chapter, it is assumed that you have already locked the item.

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.

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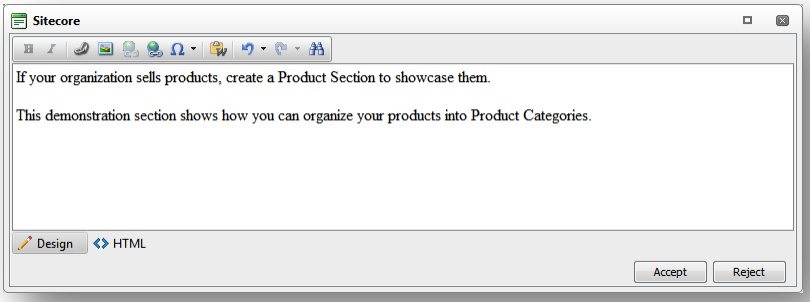
3. Click **Show Editor** to open the **Rich Text Editor**:



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.
- Undo and Redo the actions you did before.

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. If you want 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 *Chapter 5, 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.

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

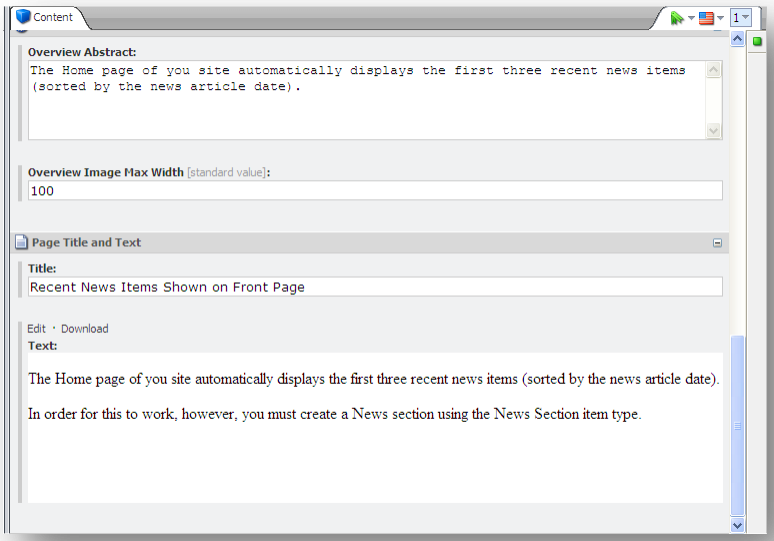
Sitecore Word fields are only supported on Internet Explorer 7 or later.

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.

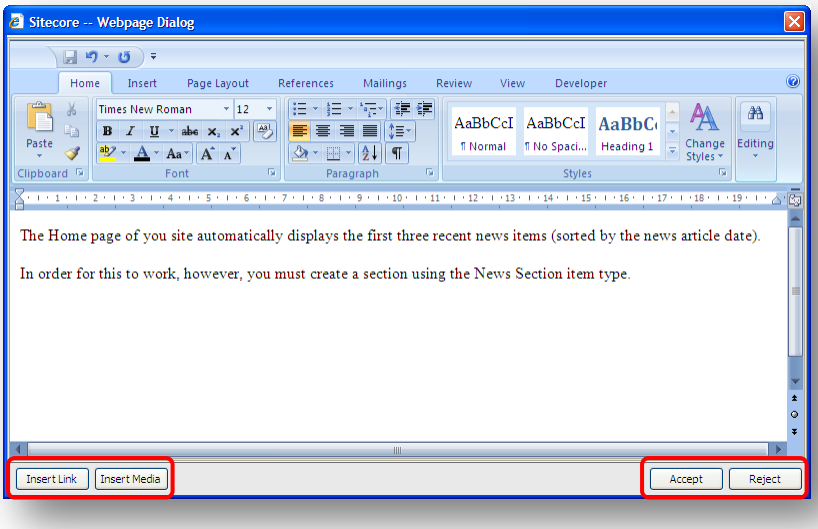
To learn how to configure Internet Explorer 8 to run this ActiveX control, see the section, *Configuring Word Fields* on page 22.

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.



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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 documentation.

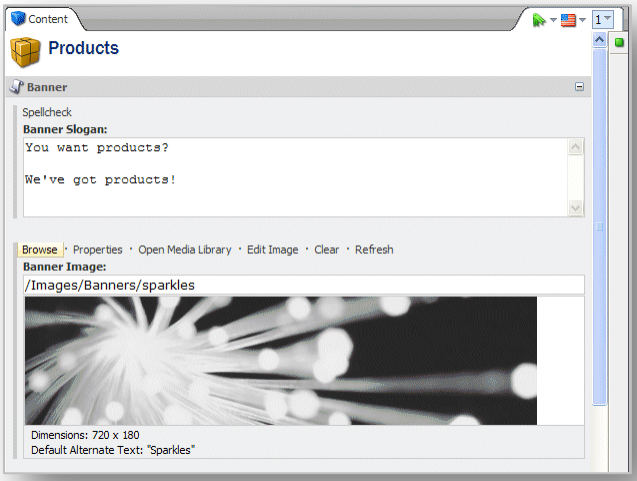
4.2.3 Working with Graphics

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.



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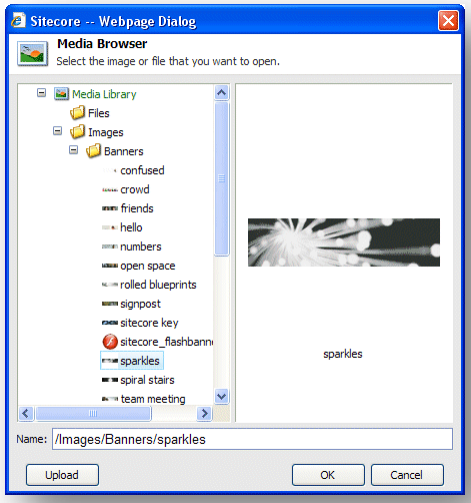
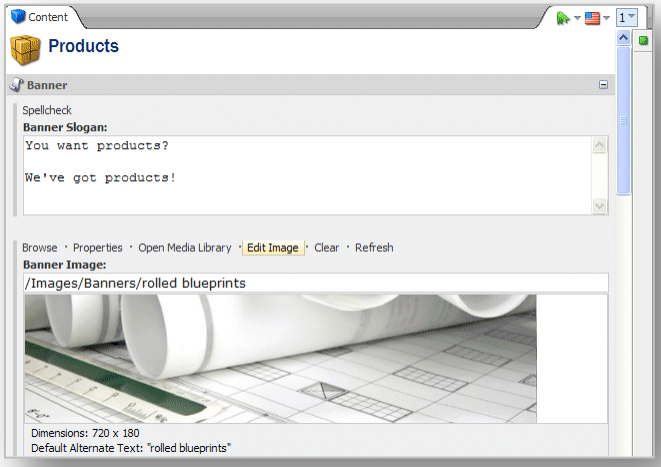
2. In the **Content** pane, click **Browse** to open the **Media Browser** dialog box:



When the **Media Browser** opens, it displays the image that appears in the item you are editing.

3. Locate the image that you want to use, select it, and click **OK**.
4. The image you selected now appears in the item you are editing.



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 **Media Browser** dialog box**.**

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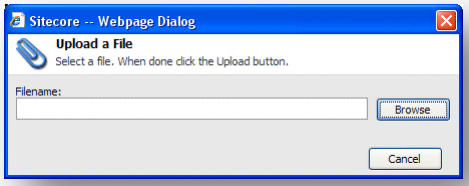
2. In the **Media Browser** dialog box, click **Upload**:



3. In the **Upload a File** dialog box, click **Browse** and navigate to the image that you want to add to the Media Library. Click **Open**.
4. Sitecore uploads the image and opens the **Content Editor** dialog box. In this dialog box, you must lock the image (like any other item you edit) and save it.

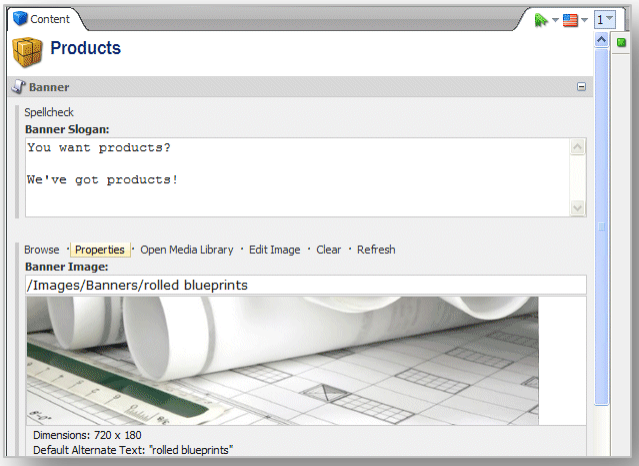
The image is now uploaded to the Media Library and you can use it on your website.

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.



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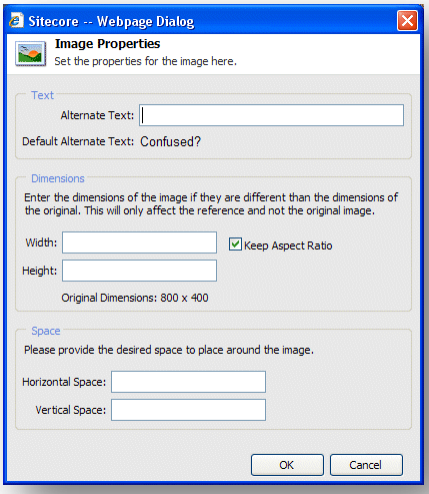
2. Click **Properties** to open the **Image Properties** dialog box:



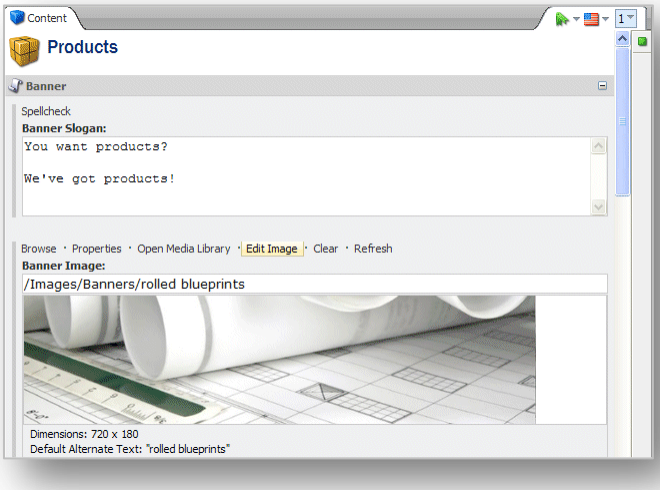
3. In the **Alternate Text** field, enter the text that you want to appear in the tooltip for this image
4. In the **Dimensions** section, specify the dimensions that the image should be displayed in — if they differ from the actual size of the image.
5. In the **Space** section, specify how much space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



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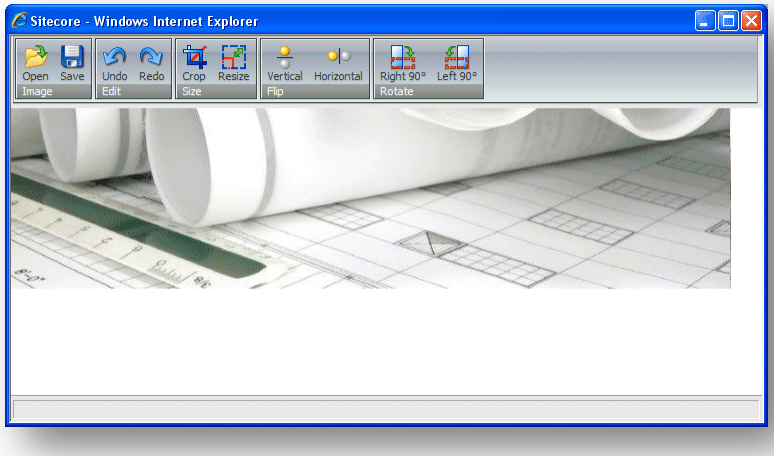
2. Click **Edit Image** to open the image. If you use Windows XP, Sitecore opens the built-in **Image Editor**. In the built-in Image Editor, you can crop, resize, flip and rotate the image:



   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**.

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4.3 Creating New Items in the Content Editor

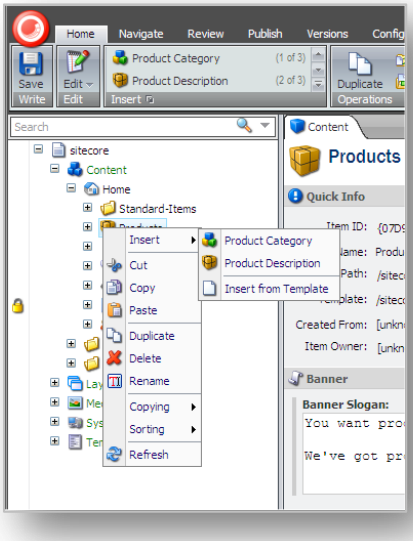
There are several ways to create new items in the Content Editor.

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.

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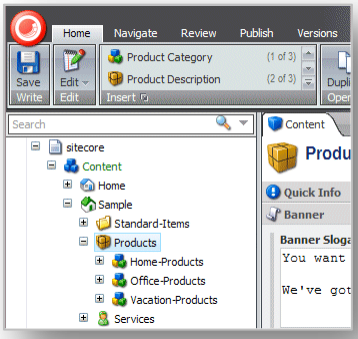
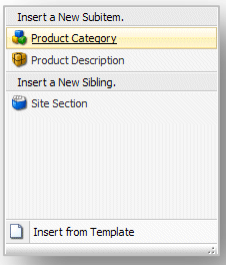
2. In the **Insert** group, click one of the item types that is displayed:



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:

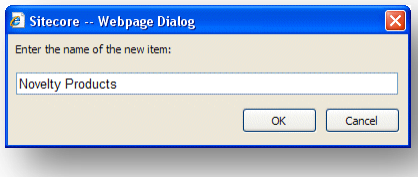


4. In this drop down list, you can select a subitem or a sibling. A sibling is an item on the same level as the current item.

   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 Products 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.

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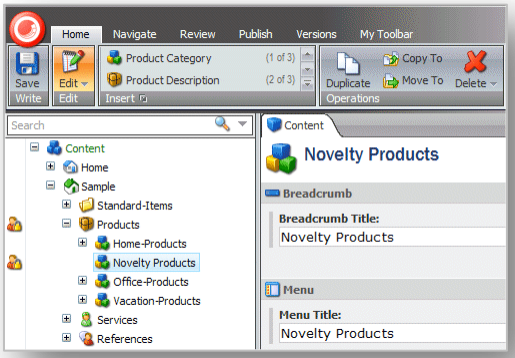
The new item is now added to your website.



As you can see, the new item has been created as a subitem of products 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.

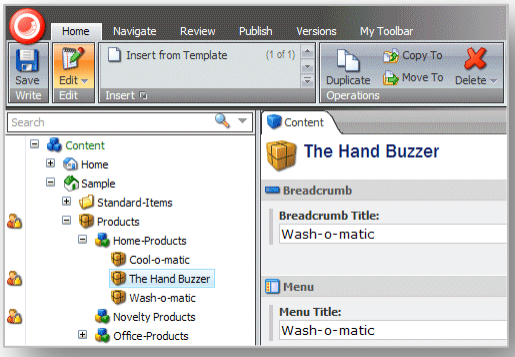
To duplicate an existing item:

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

   In this example, we will duplicate the *Wash-o-matic* product and then move it to the new product category that we just created.

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:



As you can see, the new item has been added at the same level as the item you duplicated. It also contains all of the same text, images, and so on as the original item.

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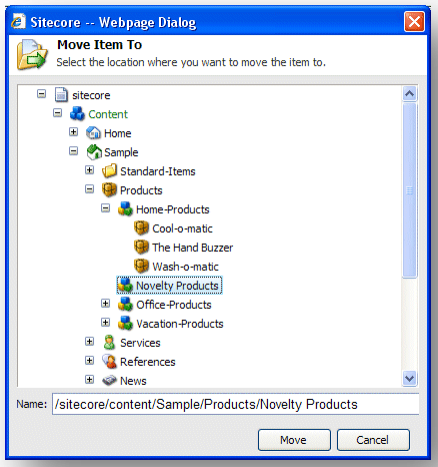
4. Edit the new item and enter the text, images, and so on that you want to be displayed in this item.

When you have finished editing the item, you can move it to the correct location.

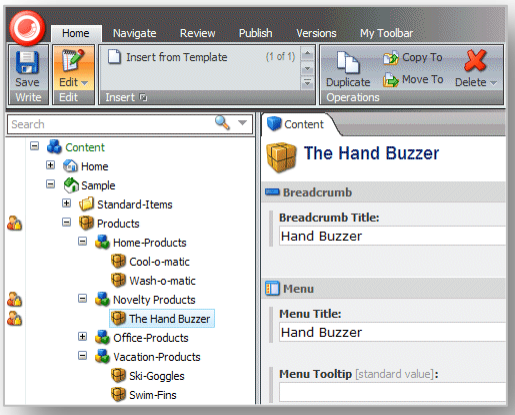
Moving an Item

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.
4. Click **Move** to move the item to the new location.



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.

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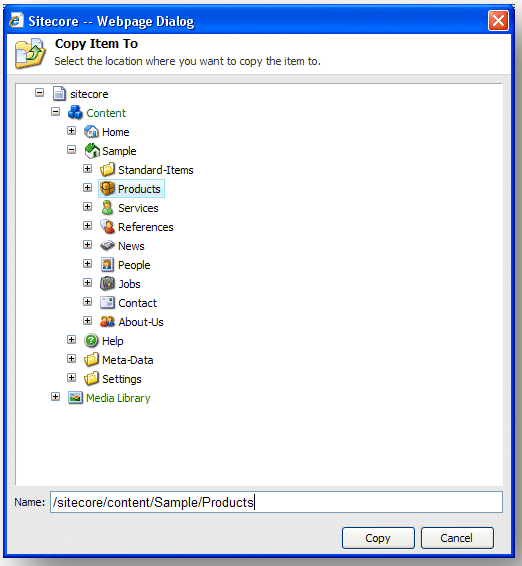
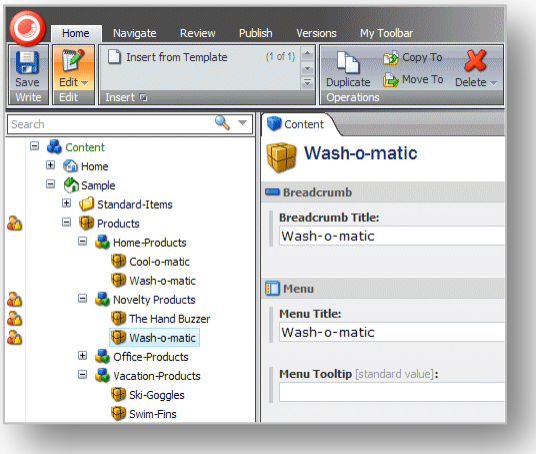
To copy an item to another location:

1. In the content tree, locate the item that you want to copy.
2. On the **Home** tab, in the **Operations** group, click **Move To**.



3. In the **Copy Item To** dialog box, select the location that you want to copy the item to.
4. Click **Copy** and the item is copied to the specified location.



5. Edit the new item.

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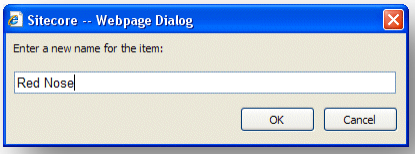
6. On the **Home** tab, in the **Rename** group, click **Rename**:



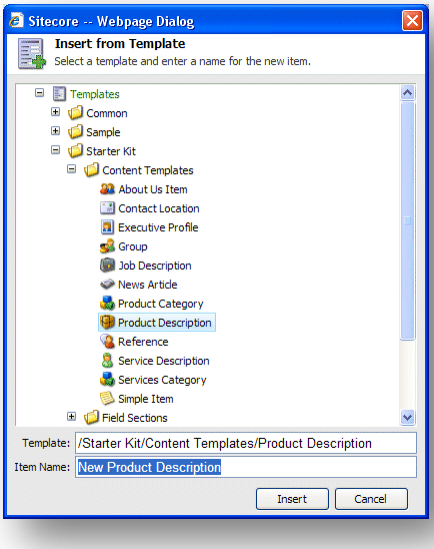
7. Enter the new name of the item.

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.

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.



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.

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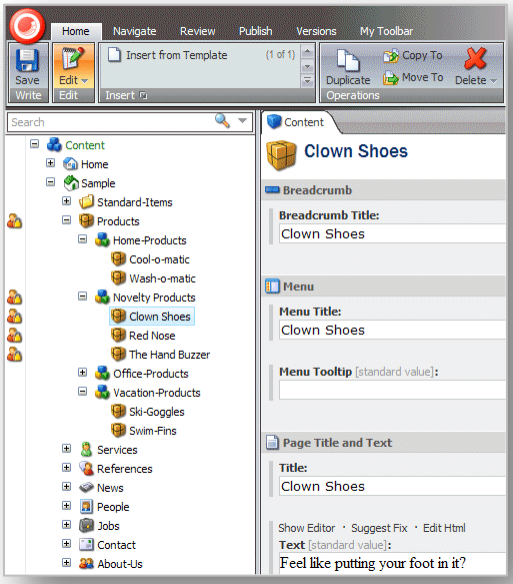
5. Click **Insert** and the item is added to the content tree.



6. Edit the item.
7. 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.

The following changes have been made to the sample site:

- The *Novelty Products* category has been added to the product category list. The *Products* page contains a *Novelty Products* entry.
- The novelty items, Clown Shoes, and so on, have been created in the novelty products category. The *Novelty Products* page lists all of the products that we created items for.
- Each of the products that you created has its own page in the website.

When you are satisfied with all the changes that you have made, unlock all the items that have been locked during this session.

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4.4 Deleting Items in the Content Editor

Content authors must delete items and content from time to time. This is a simple task in the Content Editor.

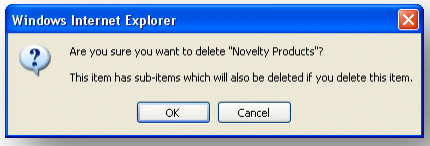
4.4.1 Deleting an Item

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 item is deleted from the website.
3. If you try to delete an item that contains subitems, a message will appear informing you that 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 items, you must move them to another part of the website.
4. Click **OK** to delete the item and its subitems.

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4.5 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.

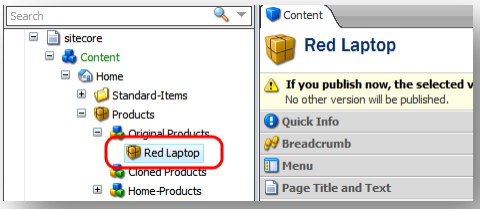
This section describes how to use the item cloning functionality. In this document, the item that is being cloned is called the *original item*.

4.5.1 Creating a Clone of an Item

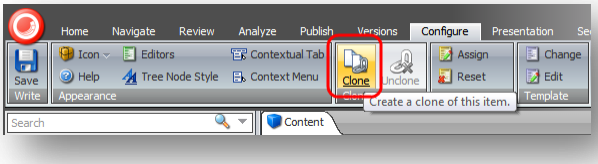
This section describes how to create a clone of an item.

To create a clone of an item:

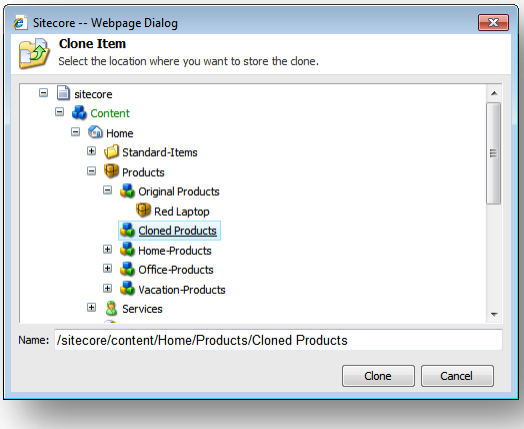
1. In the content tree, select the item that you want to clone.



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 and then click **Clone**.



4. Sitecore creates a clone item that is exactly the same as the original item.

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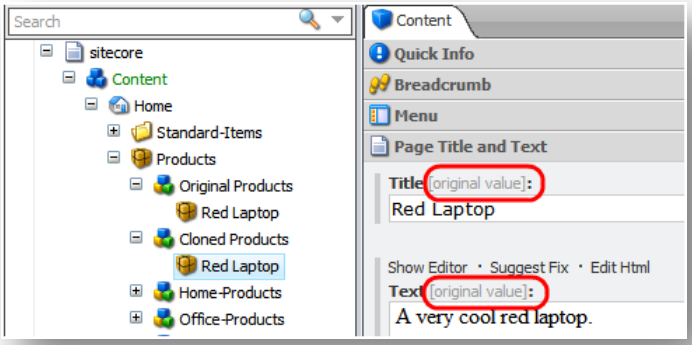
If you select the clone item, you notice that the field titles have the *[original value]* text added. This means that these values match the corresponding values in the original item.



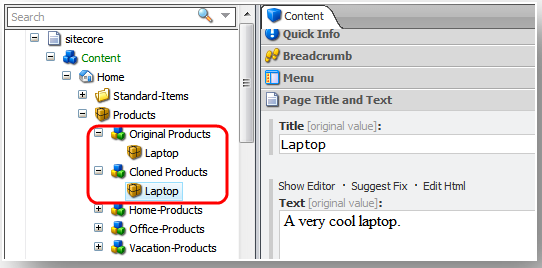
If you select the original *Red Laptop* item and edit the **Title** field, Sitecore changes the same field in the clone item accordingly. You can create multiple clones of the same item.

4.5.2 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.

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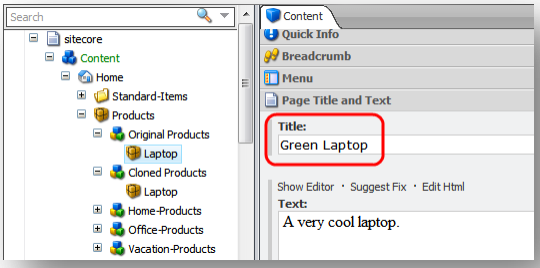
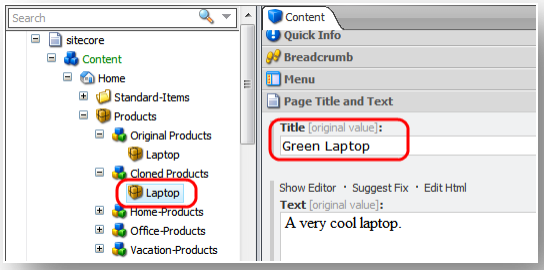
1. Edit a field in the original item and save it:

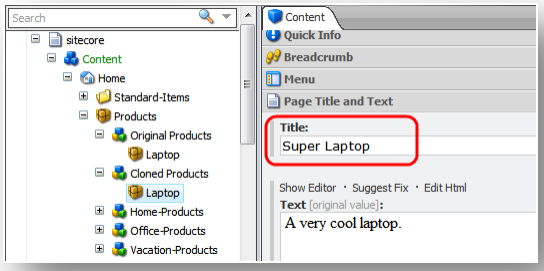


Sitecore updates this field in all the clones of this item:



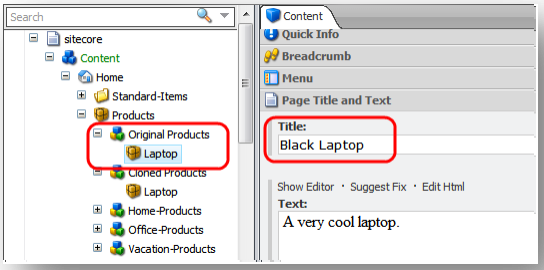
Notice the *[original value]* text on the right side of the field title.

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.



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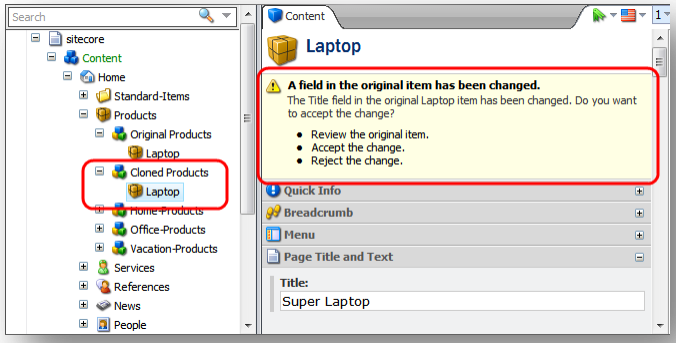
4. Select the clone. In the **Content** tab, Sitecore displays a message telling you that a field in the original item has been changed and gives you a number of options:



You can:

- **Review the original item**

  If you click this option, Sitecore selects the original item and you can review the changes.

- **Accept the change**

  If you click this option, 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**

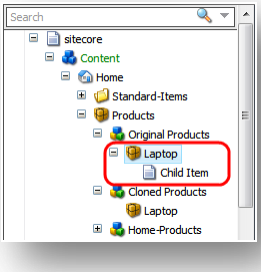
  If you click this option, Sitecore keeps the existing field value in the clone item and hides the message.

4.5.3 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:



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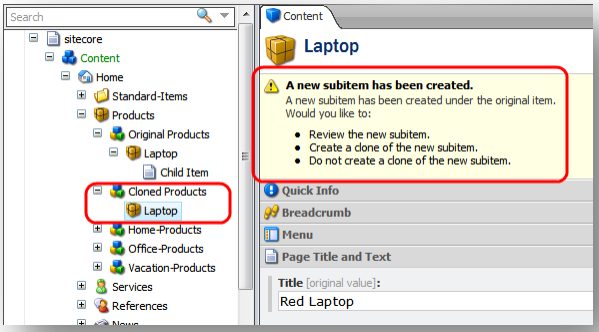
2. Select the clone item. In the **Content** tab, Sitecore displays a message telling you that a new subitem has been created under the original item.



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.

4.5.4 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.

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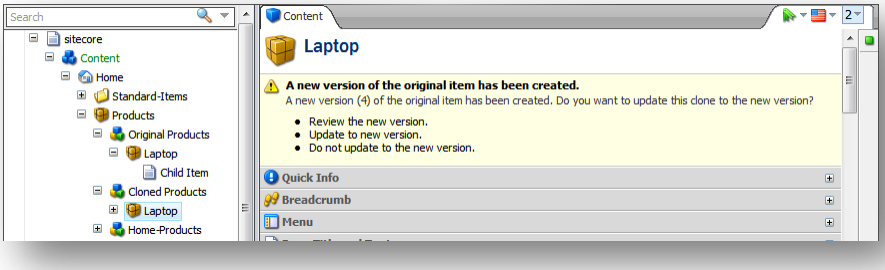
2. Select the clone item. Sitecore displays a message telling you that a new version of the original item has been created.



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**

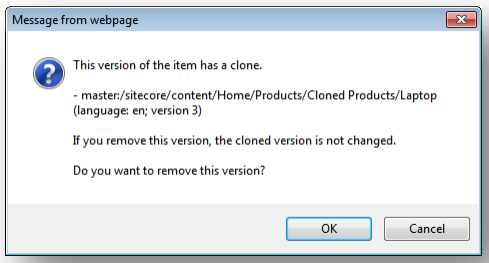
  If you click this option, Sitecore does not copy the new version and hides the message.

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.

4.5.5 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.

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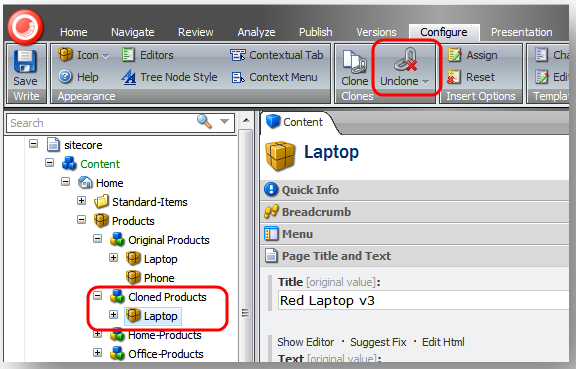
To unclone a clone item:

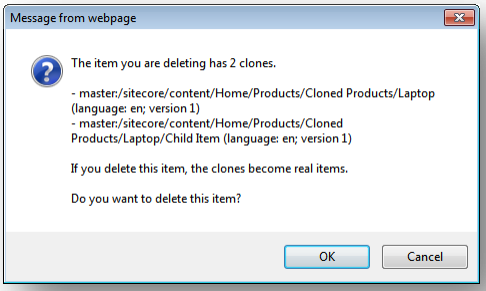
1. Select the clone.
2. On the **Configure** tab, in the **Clones** group, click **Unclone**.



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.

4.5.6 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.

4.5.7 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.

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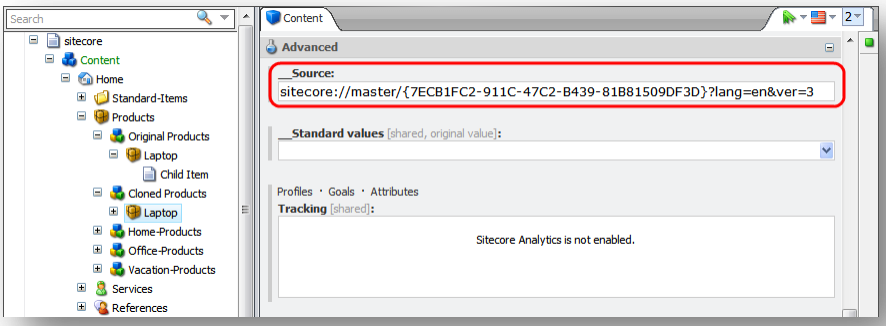
4.5.8 The __Source Field

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.

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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 sections:

- Using the Rich Text Editor

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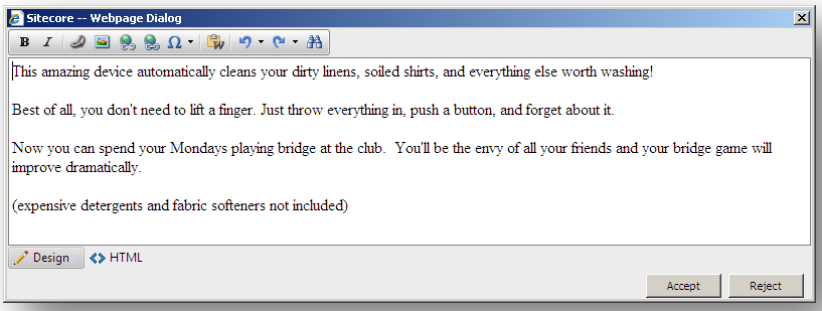
5.1 Using the Rich Text Editor

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

5.1.1 Editing Text

When you open the **Rich Text Editor**, the text in the field that you are editing is displayed:



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 are satisfied with the text, you can paste it 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, select the item that you want to edit and open the **Rich Text Editor**.
3. Click the **Paste Word** button and the text is pasted into the **Rich Text Editor**.

   When the text is pasted in, all of the information about fonts, sizes, formatting, and so on is removed.

5.1.2 Inserting, Removing, and Managing Links

As a content author, you will have to manage links in your content. The Rich Text Editor lets you insert, remove, and edit the links in your content.

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 be a link.

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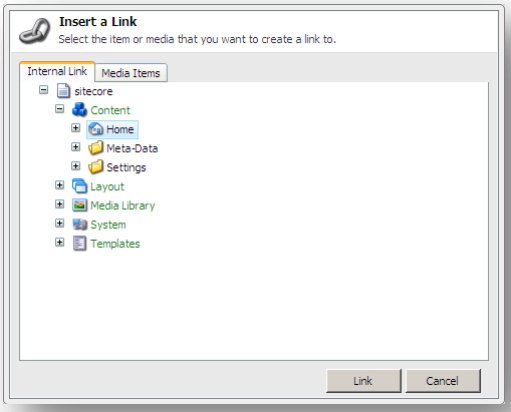
2. Click the **Insert Sitecore Link** button .



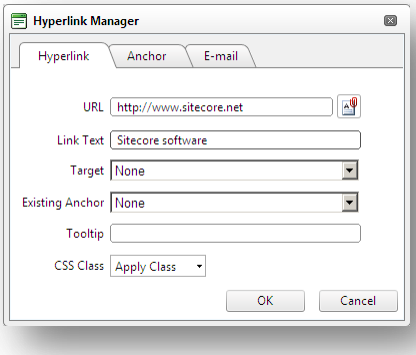
3. In the **Insert a Link** dialog box, in the **Internal Link** tab, expand the content tree and select the item that you want to create a link to.
   Alternatively, if the item that you want to create a link to is an image or media file, click the **Media Items** tab.
4. Click **Link** to create the link.

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	The URL of the website.
Document Manager	The media item to link to.

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Field	Value
Link Text	The text in the link. You can edit this text here.
Target	The window that the link should open.
Existing Anchor	Specifies whether there is an anchor already.
Tooltip	A text box that is displayed when you move the mouse over the link.
CSS Class	The style sheet that the link should use.

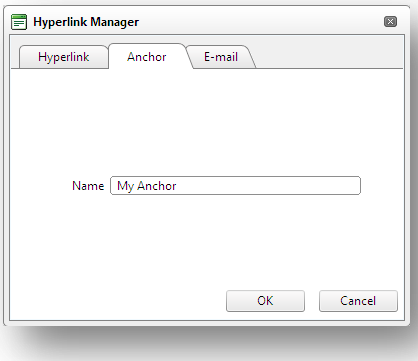
Managing Hyperlinks

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

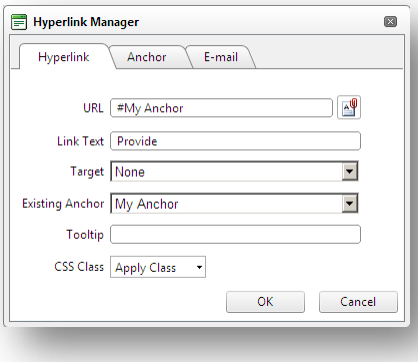
An anchor is a HTML code that is used to create a link to another page or to a particular section within a page.

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:



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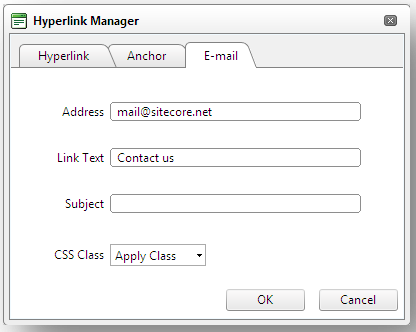
You can also use the **Hyperlink Manager** to create e-mail links. An e-mail link opens a new mail in the program that you use to send e-mail, for example, Microsoft Outlook. The e-mail will be sent to the e-mail address specified in the e-mail link.

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.

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.

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Chapter 6

The Media Library

This chapter introduces 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

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6.1 Overview

You use the Media Library to store all the media files that you want to use on your website. Media files, such as images, can be embedded in a web page or made available for download by visitors to your website.

The Media Library can contain the following:

- 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 you can use to edit images or you can use your own preferred image editing software.

The Media Library has the following benefits:

- You can keep all your media files in one place and organize them in a folder structure similar to the content tree.
- You can navigate the content tree or use Sitecore's search functionality to quickly find media items.
- It is easy to 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.
- You can make every media content item and media file versionable.

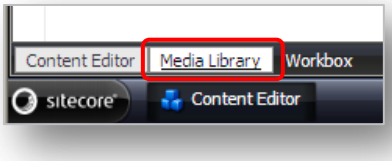
6.1.1 Opening the Media Library

There are a number of ways to open the Media Library:

Content Editor

1. Log in to Sitecore as admin and select Desktop.
2. Click the **Sitecore** menu, and then click **Content Editor**.
3. In the **Content Editor** content tree, click the **Media Library** node.

   Alternatively, click **Media Library** in the bar at the bottom of the **Content Editor**.



Sitecore Menu

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

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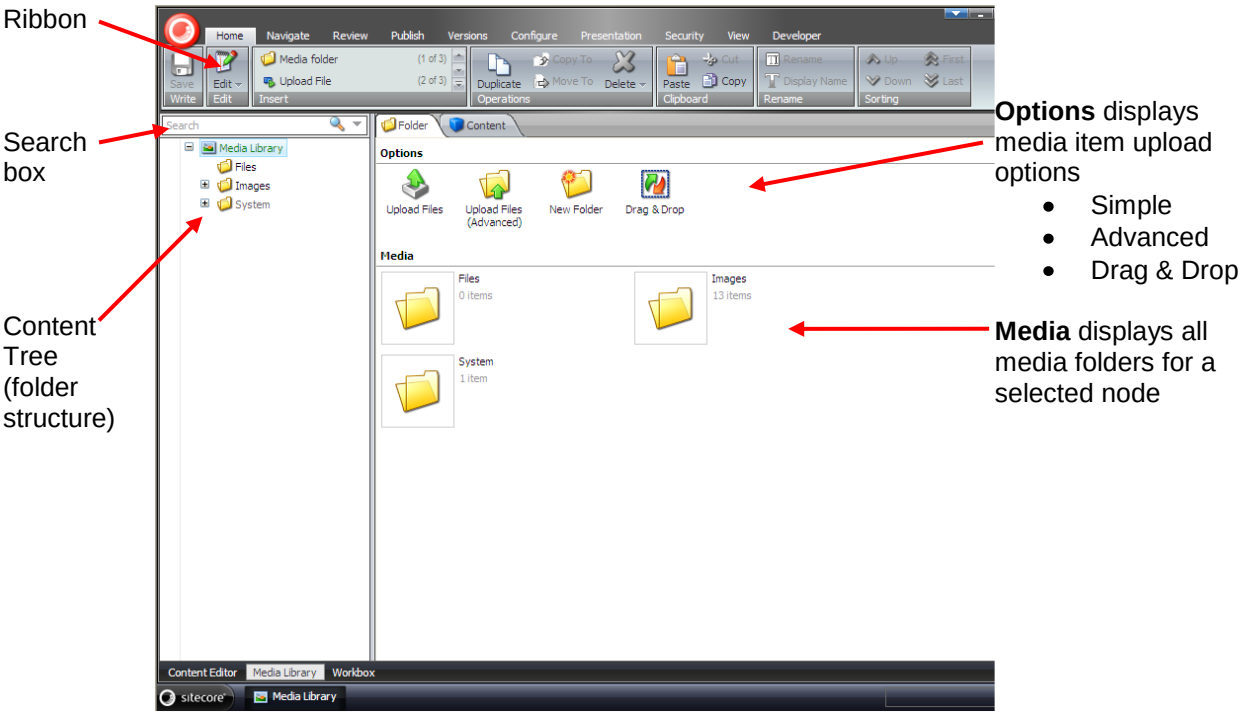
6.2 The Media Library User Interface

The Media Library user interface 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 that you get 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.

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.

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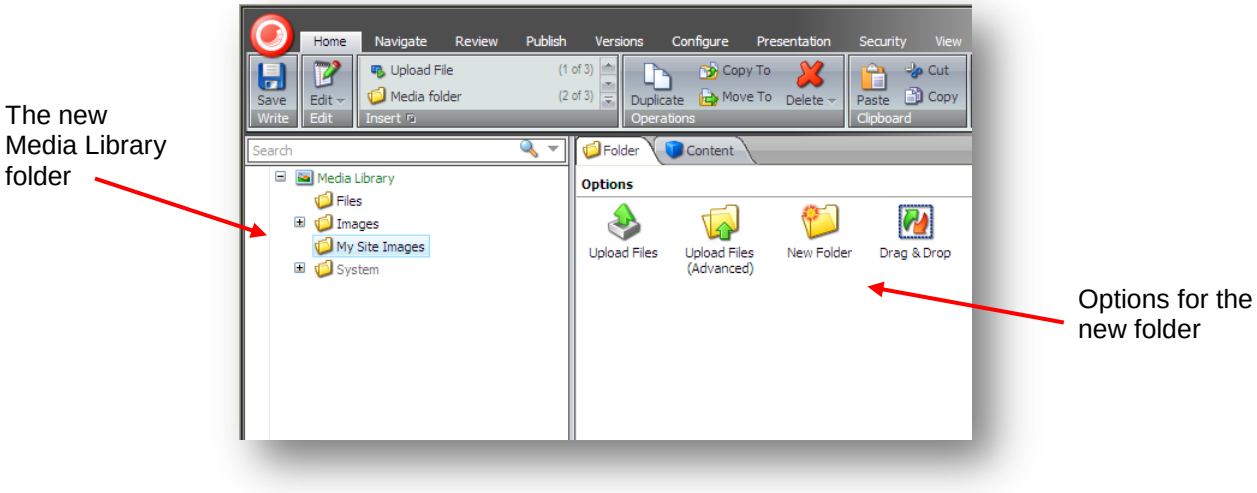
An easy way to organize your Media Library folder structure is to mirror the structure of your website. For example, if your site has four main sections; *Home*, *Products*, *Jobs* and *Contact Us* you could create four folders with the same names to store all your images and other media. This will make it easier to locate media items as your site grows and you need to update media items.

6.2.1 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 but try to keep your folder structure as simple and uncluttered as possible.

To create a new folder:

1. In the **Options** pane, click **New Folder**.
2. Give the new folder a name such as, *My Site Images*.
3. The new folder is displayed at the same level as the other folders in the content tree.



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.

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6.3 Uploading Media Files

In the Media Library, there are three different ways to upload media files:

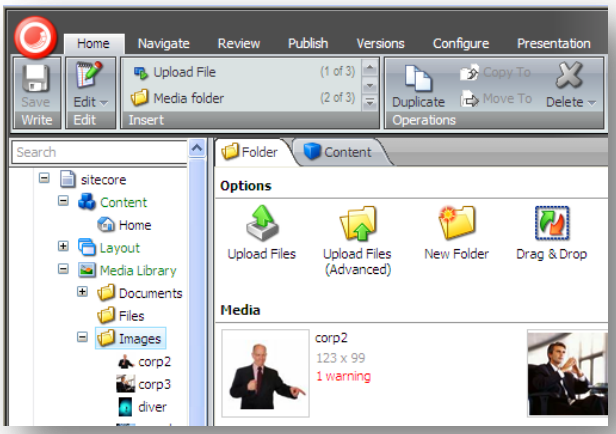
- Upload Files
- Upload Files (Advanced)
- Drag & Drop

6.3.1 Upload Files

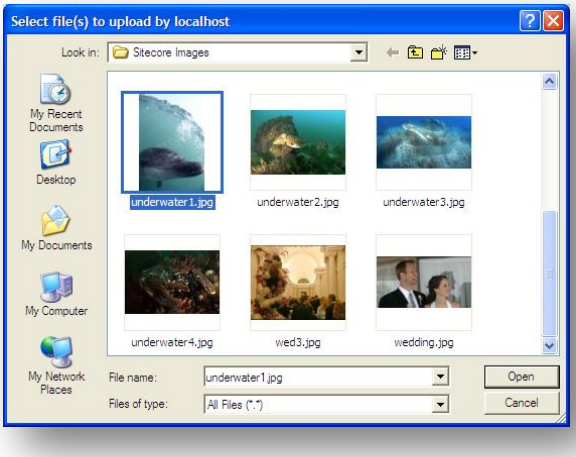
Use the Upload Files button to add single or multiple files to the Media Library.

To upload a single media file:

1. In the **Media Library**, in the content tree, select a destination folder, such as the *Images* 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.



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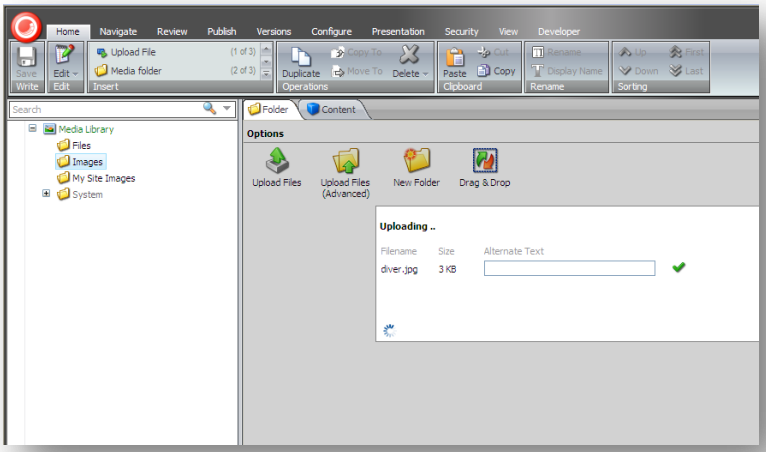
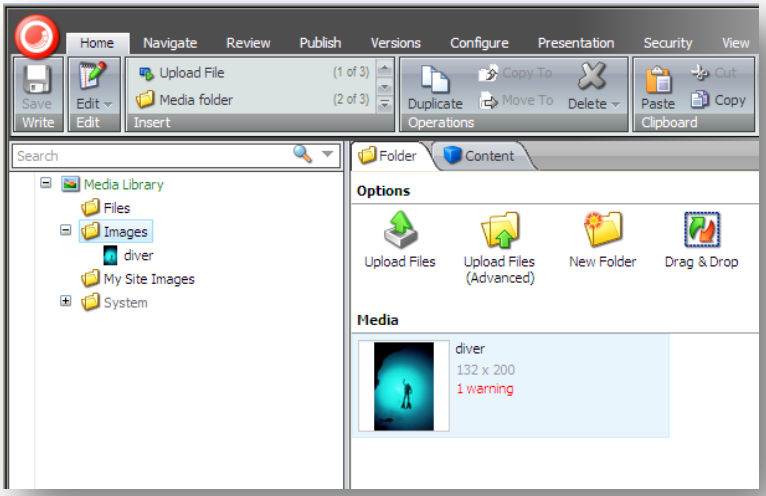
4. Click **Open**.

   During the upload process the following information is displayed:



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



6.3.2 Upload Files (Advanced)

Use the Upload (Advanced) button to upload single or multiple media files to the Media Library.

To upload multiple files:

1. In the **Media Library**, in the content tree, select the *Images* folder.

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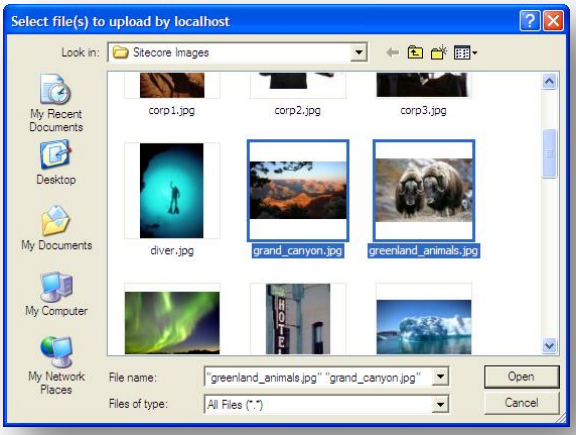
2. In the right-hand pane, in the **Options** section, click **Upload Files (Advanced)**.

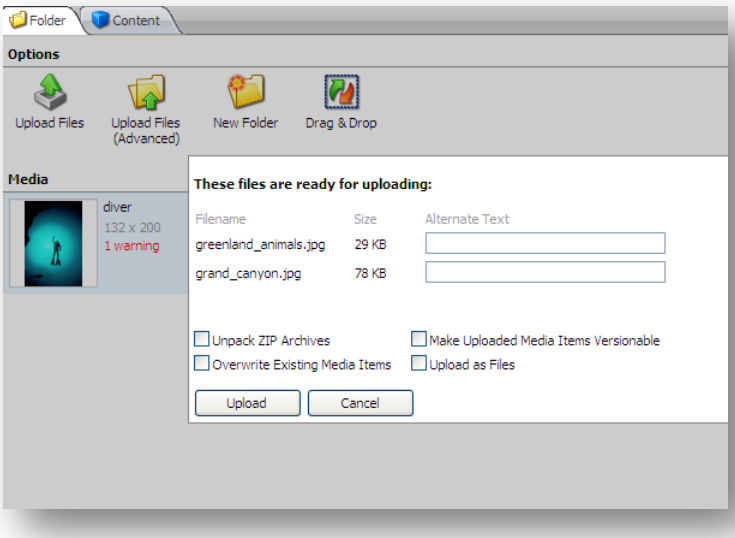


3. In the **Select Files to Upload** dialog box, browse to the folder on your computer that contains the images you want to upload.

   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.

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Field	Description
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.

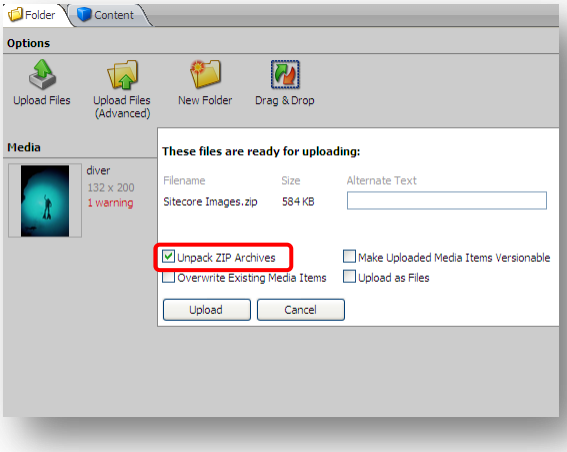
6. Click **Upload**.

   The uploaded images are displayed in the *Images* 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 a **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**.

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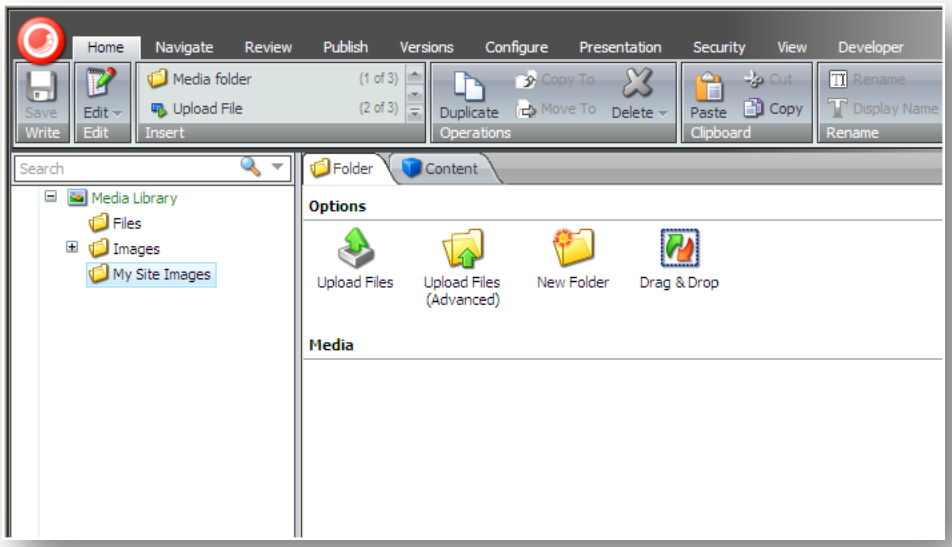
The archive is uploaded and extracted to the Media Library folder you selected.

6.3.3 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.

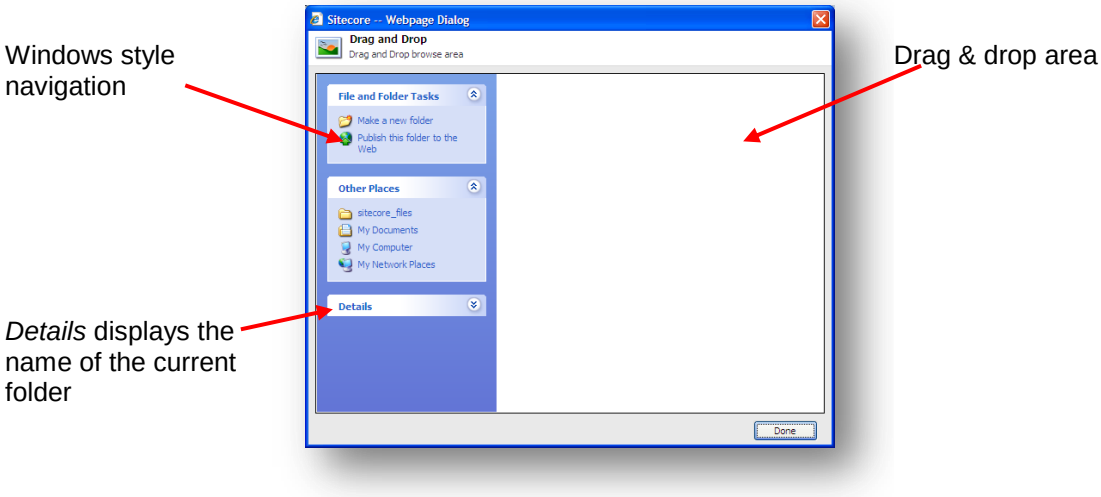


To drag and drop files to the Media Library:

1. In a **Media Library**, select the folder that you want to upload the files to.

   For this exercise, we have created a new folder called *My Site Images*.

2. In the **Folder** tab, click **Drag & Drop** to open the **Drag and Drop** dialog box.



3. Open Windows Explorer.

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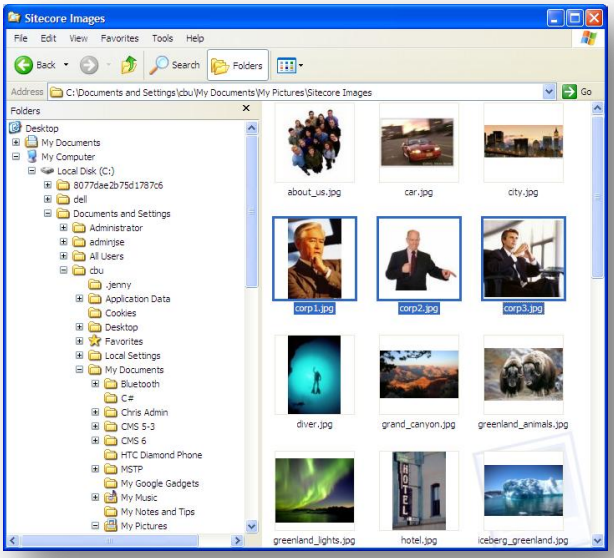
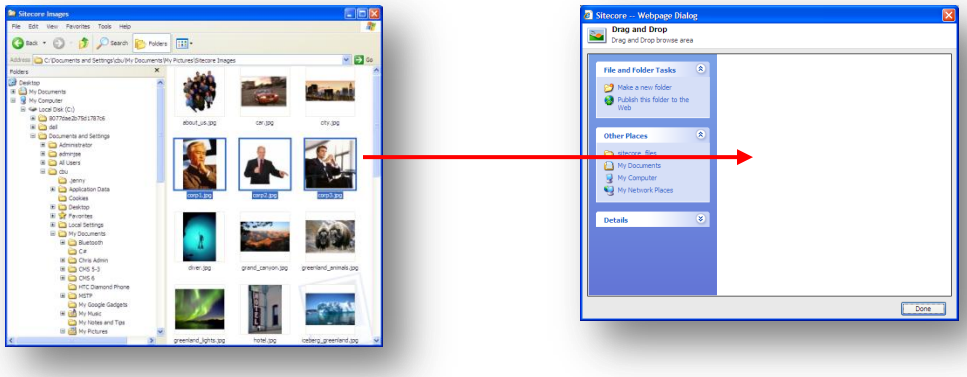
4. In **Windows Explorer**, navigate to the folder where the images are stored and select the images you want to upload.



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



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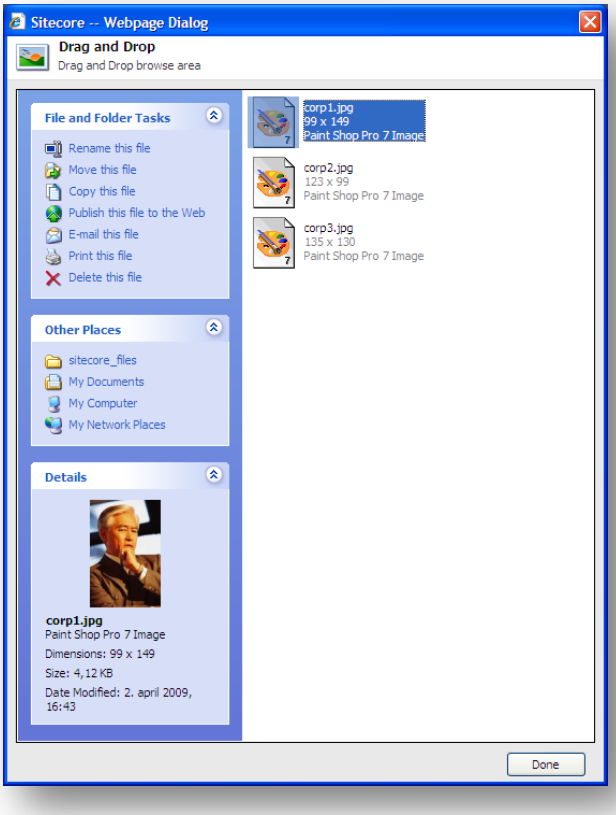
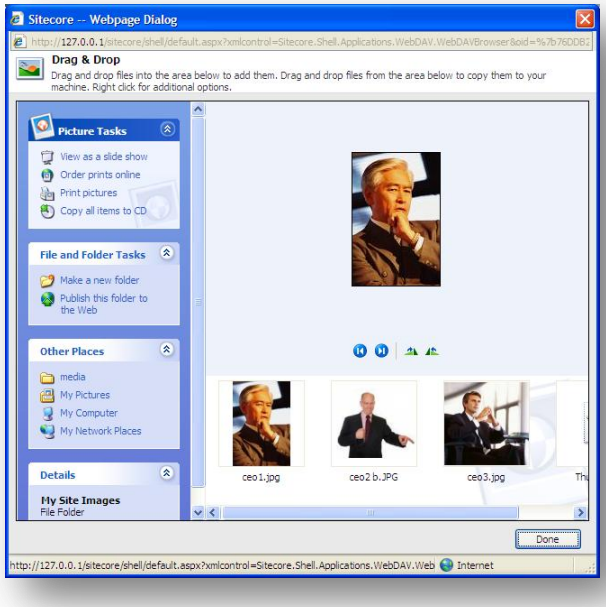
7. The **Drag and Drop** dialog box displays the images that you want to upload.



8. If the folder already contains images, you must drag the new images to the row of thumbnails displayed at the bottom of the dialog box.



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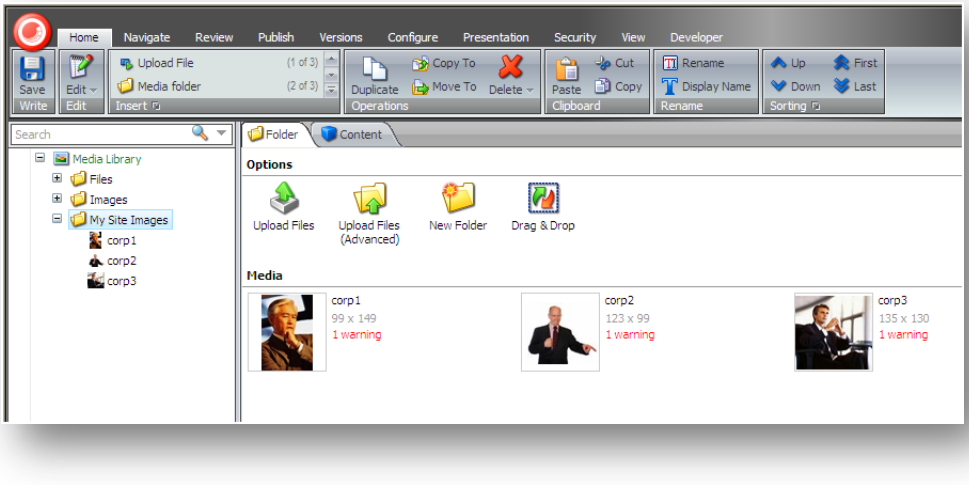
9. When you have dragged all the images to the **Drag and Drop** dialog box, click **Done** and they are copied to the **Media Library**.
10. In the **Media Library**, **Media** section, you can now see the images that you uploaded and that each item contains a warning.



11. 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.

For more information about configuring Internet Explorer to support Drag and Drop, see the *WebDav Configuration* documentation that is available on the Sitecore Developer Network.

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6.4 Editing Media Items

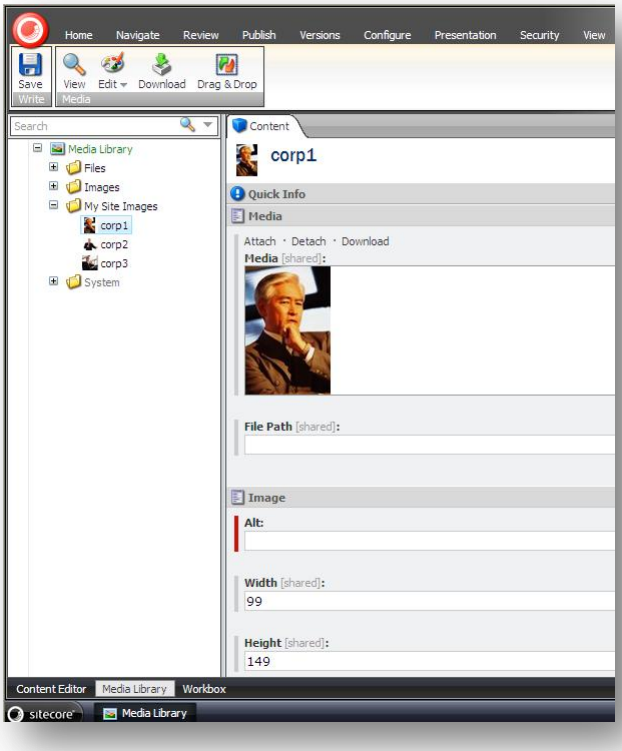
In the Media Library, you can edit media items such as images, documents and videos either using Sitecore tools such as the Image Editor for images or with other applications that you have installed on your computer such as Microsoft Word for documents or Photoshop for images.

6.4.1 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:



6.4.2 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.

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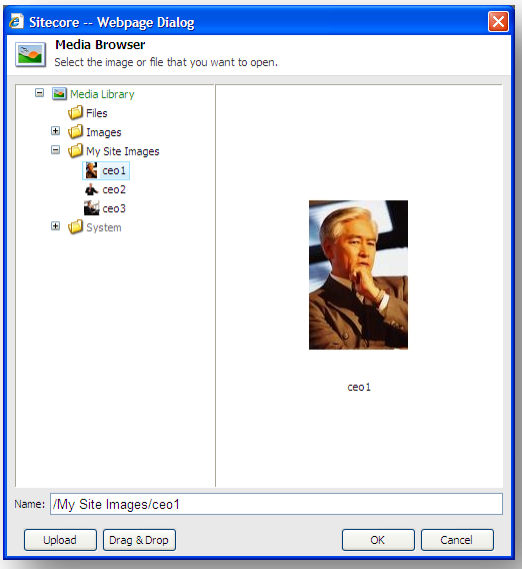
The Media Browser

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.

To upload new media items from the **Media Browser** window, click **Upload** or **Drag & Drop**.

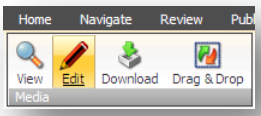


Note
You can also access the Media Browser from the Content Editor. In a content item, in an **Image** field, click **Browse** to open the **Media Browser** window.

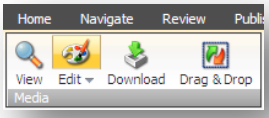
6.4.3 Editing Options

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.



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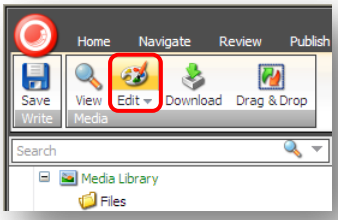
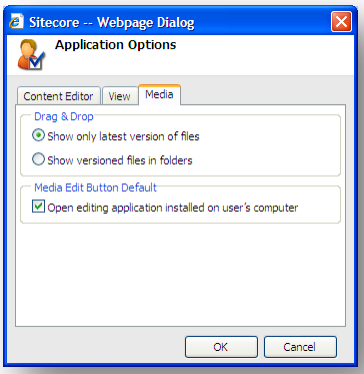
If you select an image item and then click the top half of the Edit command, you open the image in the **Sitecore Image Editor** by default.



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

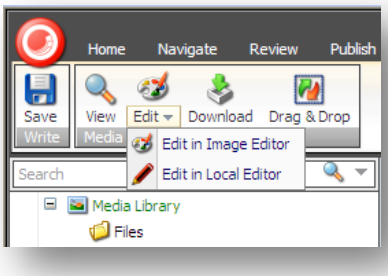
To change you default image editor:

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

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These options allow you to override the default setting and select which editor you prefer to use.

6.4.4 Using Drag and Drop to Edit Media Items

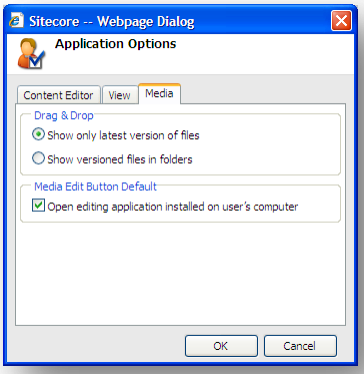
You can also use the Drag & Drop dialog box to select a file and edit it.

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.

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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* on page 90.

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**.

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6.5 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.

6.5.1 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

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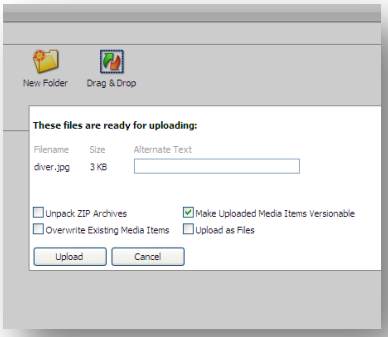
the **Make Uploaded Media Items Versionable** check box.



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.

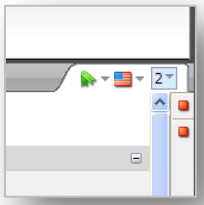
Note
When you upload new media files to the Media Library, they are unversioned by default.

6.5.2 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.



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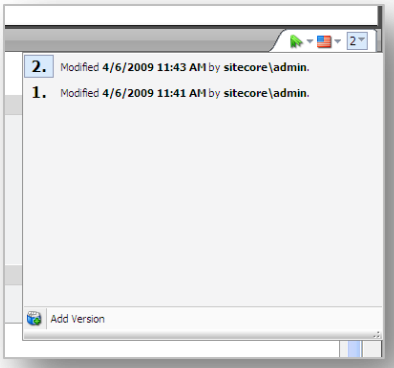
To switch between versions:

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.

6.5.3 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" />
```

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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.

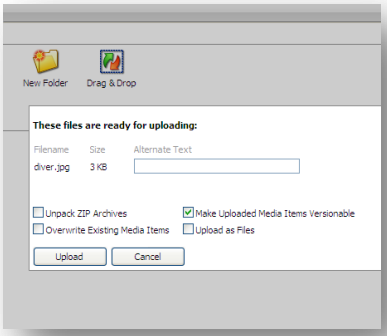
Changing this setting in the `web.config` file makes every file that you upload to the **Drag & Drop** dialog box versionable.

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* on page 86.

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.

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Chapter 7

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:

- Security and Client RSS Feeds
- RSS Feeds
- Sitecore Client Feeds
- Security and Client RSS Feeds

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7.1 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.

7.1.1 Setting Up an RSS Feed

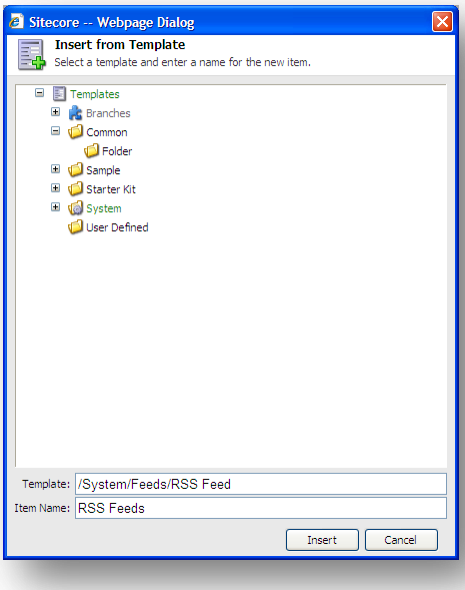
In Sitecore, you *must* use the Content Editor to set up an RSS feed.

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. In the **Insert from Template** dialog box, 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.

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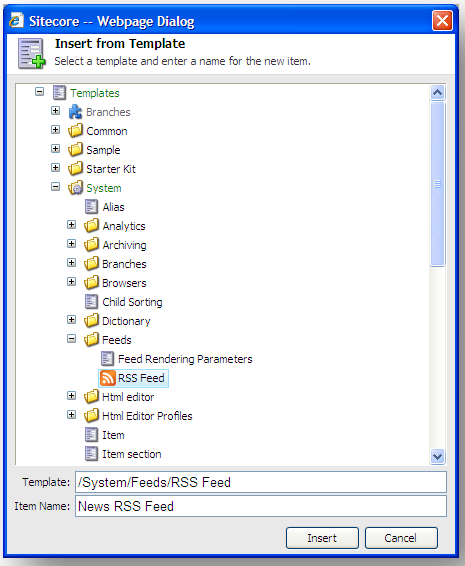
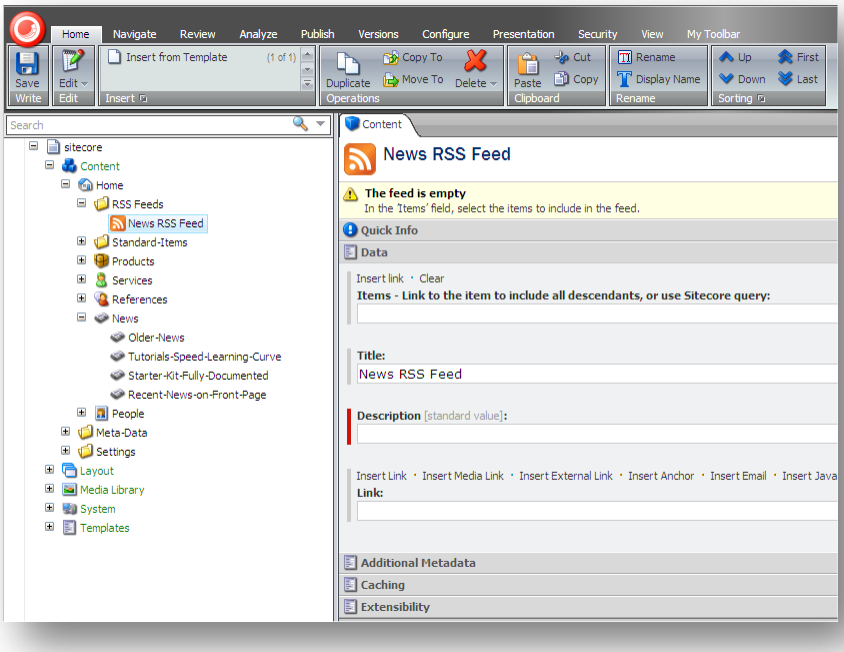
To create an RSS feed in the Content Editor:

1. In the **Content Editor**, select the *RSS Feeds* folder that you just created.
2. In 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**.



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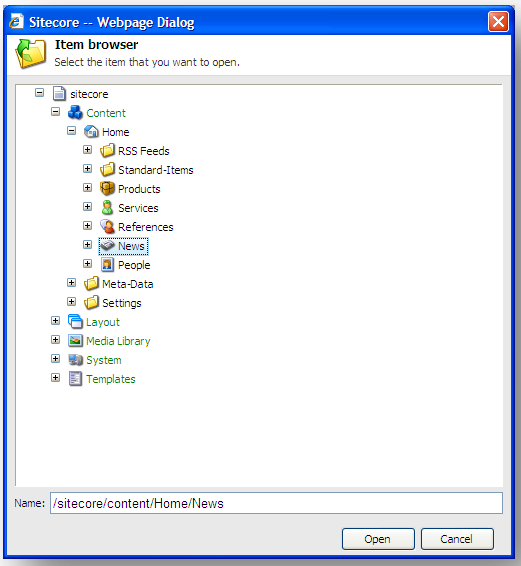
The new feed displays a warning informing you that the feed is empty and that you must select an item to include in the feed.

6. In the **Items** field, click **Insert Link**.



7. In the **Item Browser** dialog box, expand the *Home* item and select the *News* item.

   The *News* item is included in the RSS feed.

8. In the **Description** field, enter a description of the RSS feed.
9. 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.

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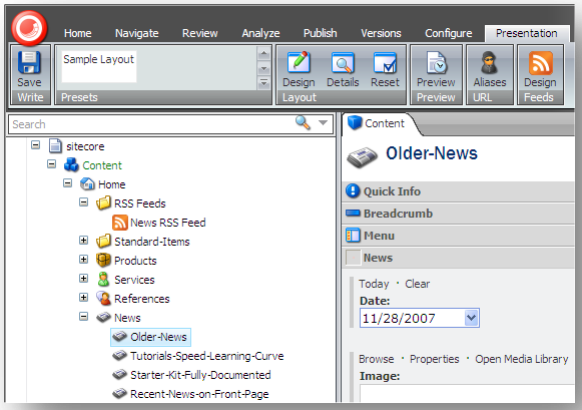
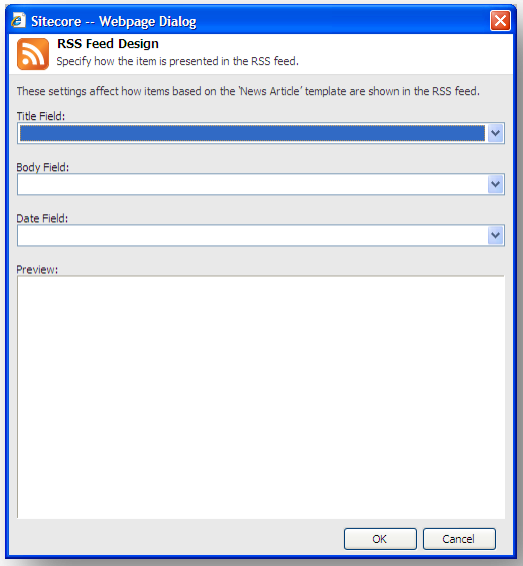
2. Click the **Presentation** tab.



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.

5. When you have filled in these fields, click **OK**.

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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.

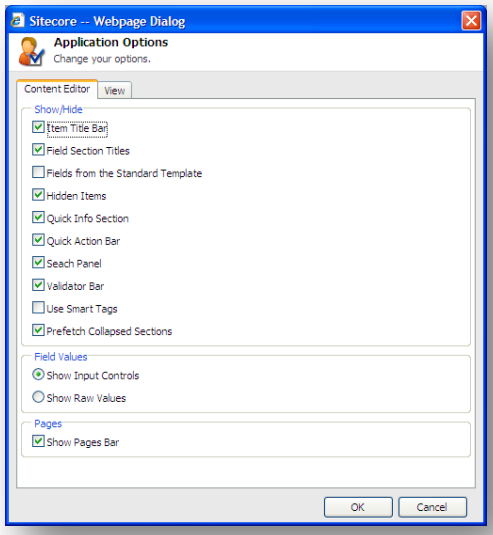
When you have configured how the feed should be presented, the RSS feed item should no longer display any warnings.

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.

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.
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.

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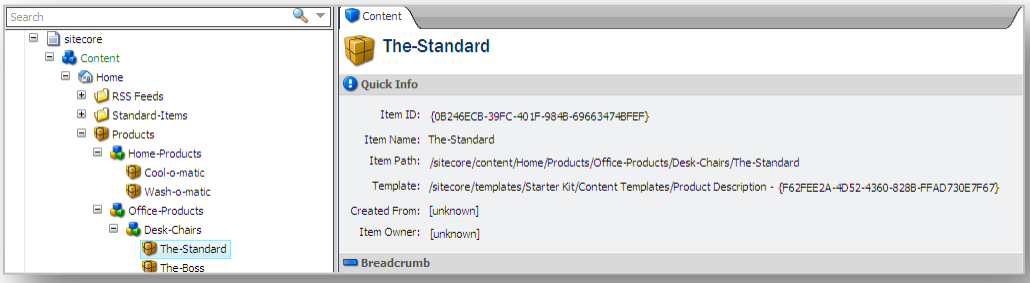
5. Expand the **Quick Info** section.



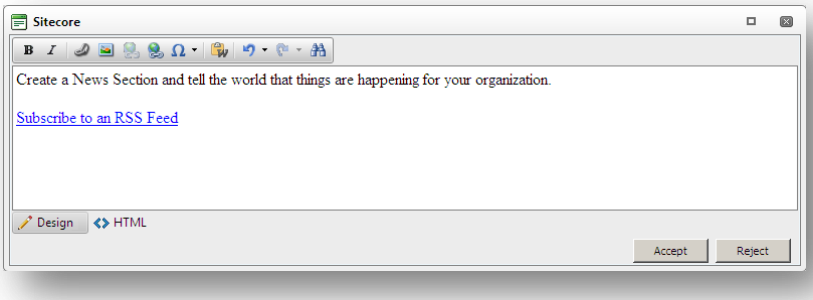
6. The **Template** field tells you which template the item is based on.

7.1.2 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. Scroll down to the **Text** field and click **Show Editor**.
3. In the **Rich Text Editor**, enter some text for the link.



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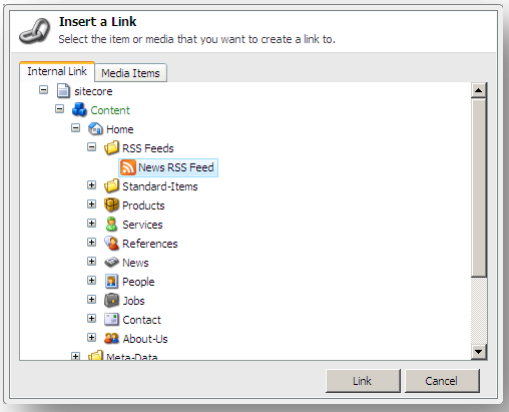
4. Select this text and click the **Insert Sitecore Link** button .



5. In the **Insert a Link** dialog box, navigate to the RSS feed item that you created earlier.
6. Click **Link** to create the link.
7. In the **Content Editor**, save your changes.

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 you are satisfied that the RSS feed works correctly, you can publish it on your website.

Note
You must publish all the changes that you made before they can be made available on your website.

A More Complicated Scenario

As we mentioned earlier, if the subitems are based on a different template, you must specify how each of these items should be presented in the feed. Let's look at such a scenario.

For example, if you use your website to promote your extensive range of products, you might want to create an RSS feed for your products page. This way customers can keep up to date with the latest changes to you product portfolio.

However, these products are divided into different categories and the website uses different templates.

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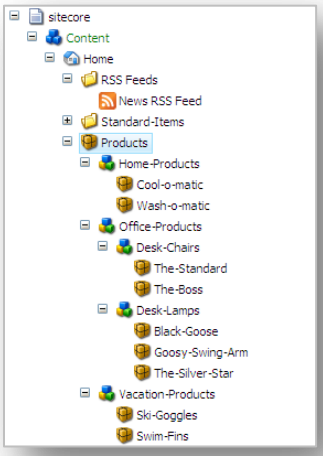
The content tree might look something like this:



To create an RSS feed for your products:

1. Open the **Content Editor**.
2. Select the *Products* item and set up the RSS feed for this item — it is the parent item.
3. In the *Products* item, insert a link to the feed item.
4. Select one of the product categories and click **Presentation**, **Design** to configure how the feed is presented for this item.

   If the different product categories use different templates, configure one of each.
5. Select one of the product items and click **Presentation**, **Design** to configure how the feed is presented for one of the individual product items.

   Again, if the different product items use different templates, configure one of each.
6. Select the *Products* item and click **Preview** to see a preview of the feed.
7. When you are satisfied with the feed, publish all the items that you have modified.

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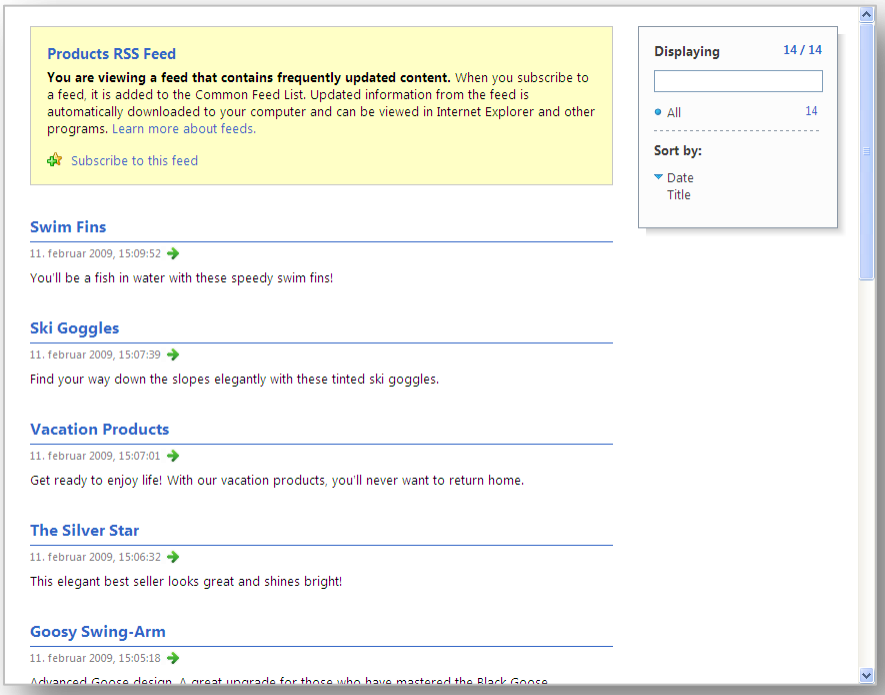
This RSS feed presents a list of all the product category items and product items listed according to date.



7.1.3 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.

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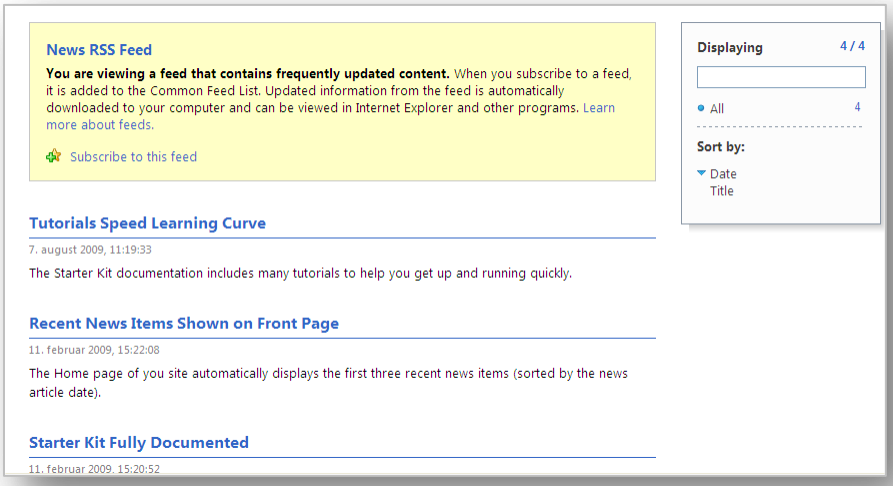
2. Navigate to the item that you have created an RSS feed for — the *News* page.

3. In the *News* page, click the *Subscribe to an RSS Feed* link to open a new page displaying the RSS feed.



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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.

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7.2 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 *Chapter 8, Workflows for Content Editors*.

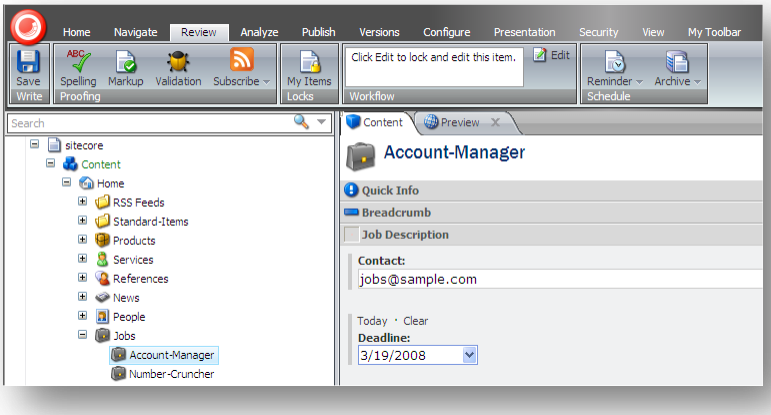
7.2.1 Item Feeds

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.



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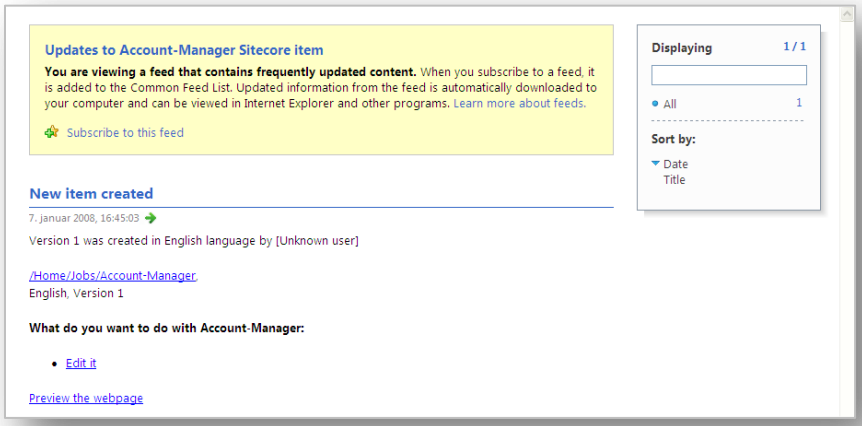
2. Click the **Review** tab, and then in the **Proofing** group, click **Subscribe**.



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.

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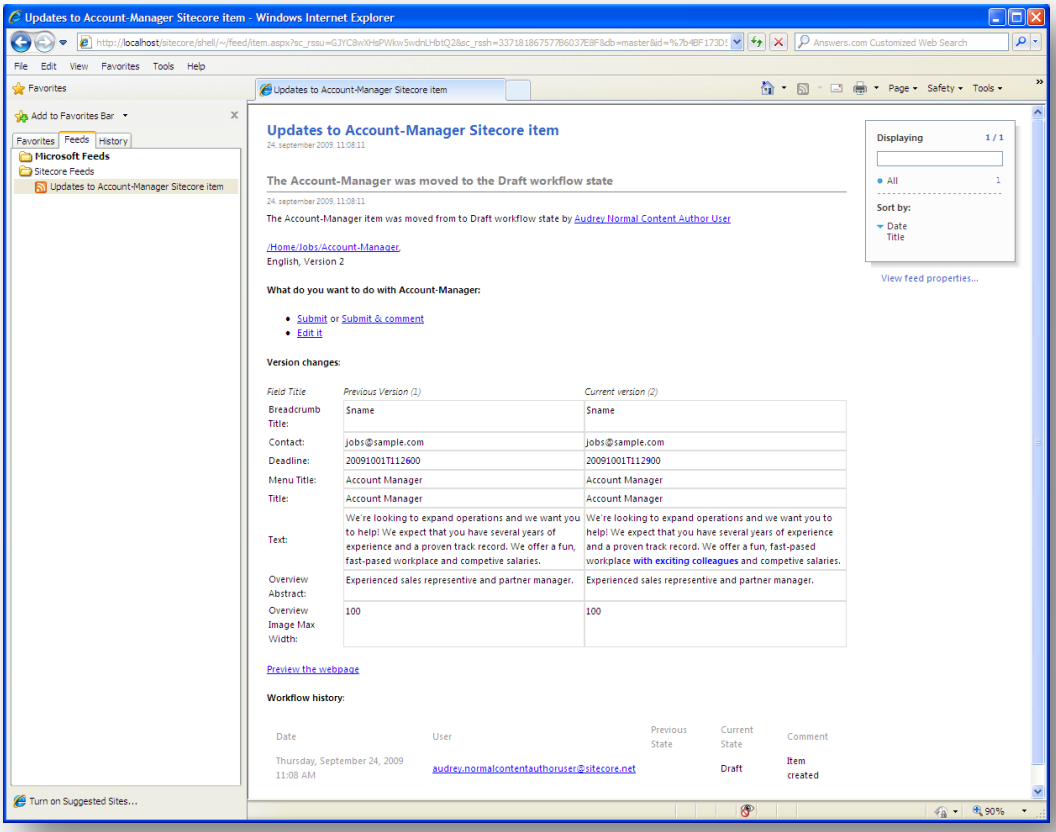
In **Internet Explorer**, in the **Favorites** panel, click the **Feeds** tab, and then click the link to the item feed.



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.

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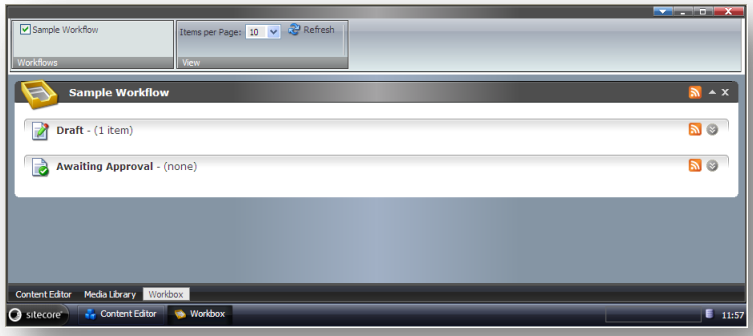
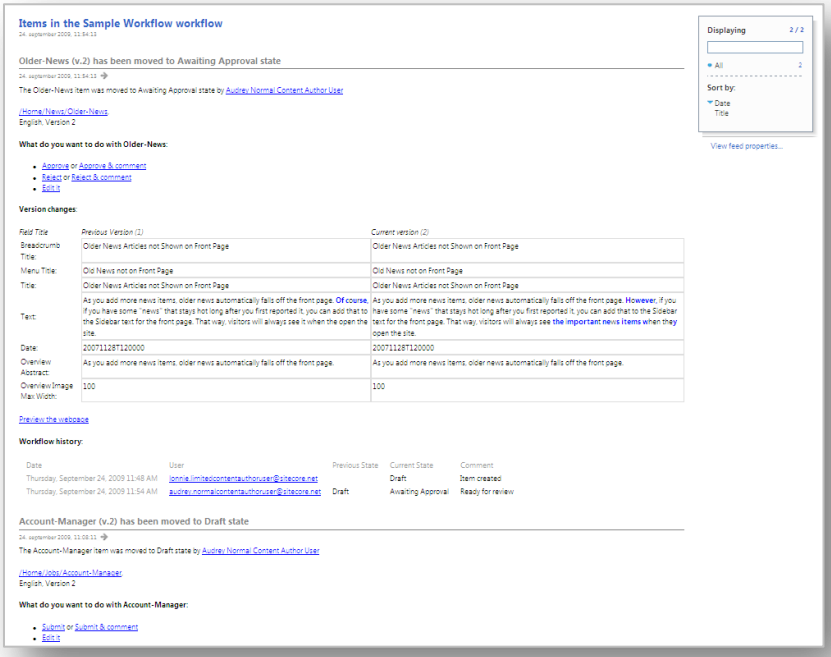
To subscribe to a workflow feed:

1. Open the Workbox.



2. To subscribe to the workflow feed, click the **RSS feed** button for the workflow.

   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.

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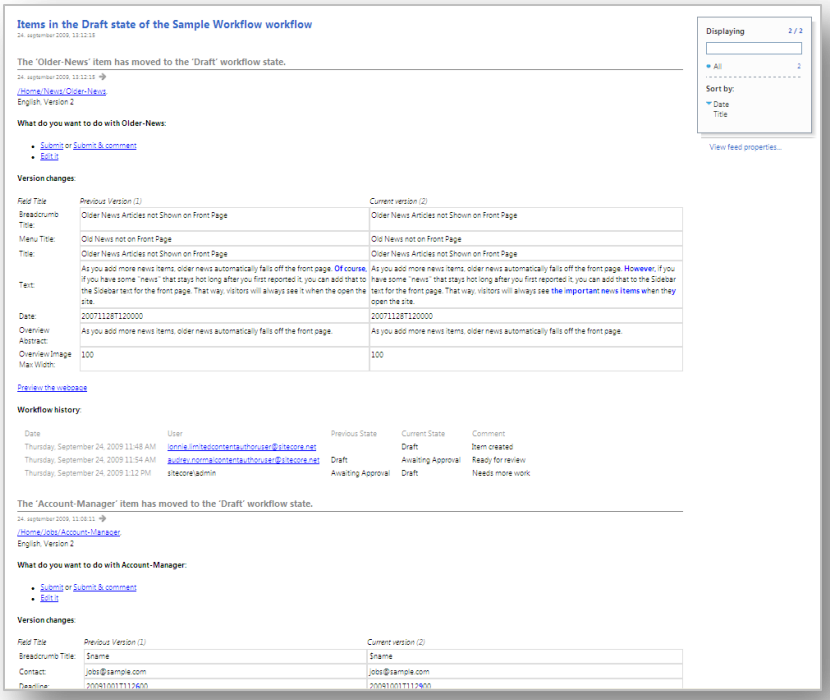
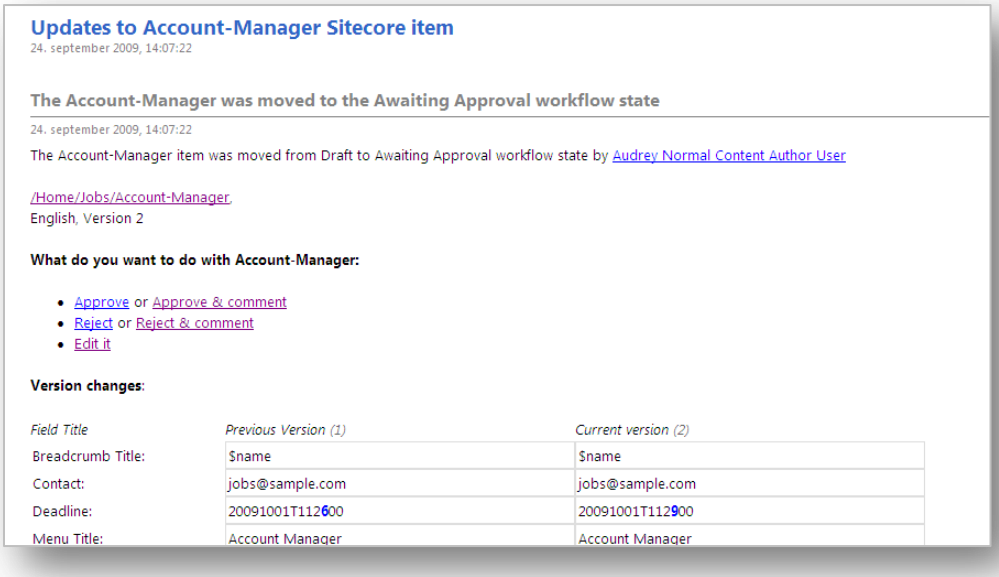


Using the RSS Feeds

When you have subscribed to a workflow feed, you can use the RSS Feed to perform the tasks that you have permission for.

For example, in the following feed:



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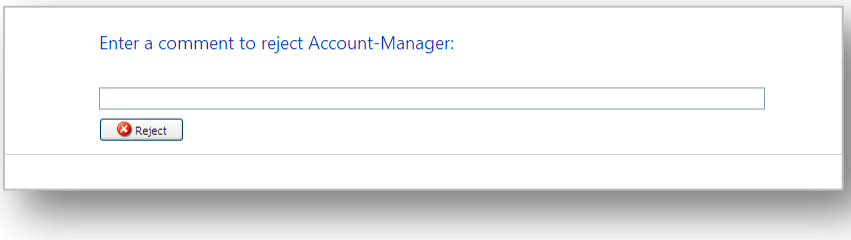
The user can:

- 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.

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7.3 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.

To learn how to tighten security around RSS feeds, see the *Sitecore Security Hardening Guide*.

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Chapter 8

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

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8.1 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 contain one workflow state 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.

8.1.1 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:

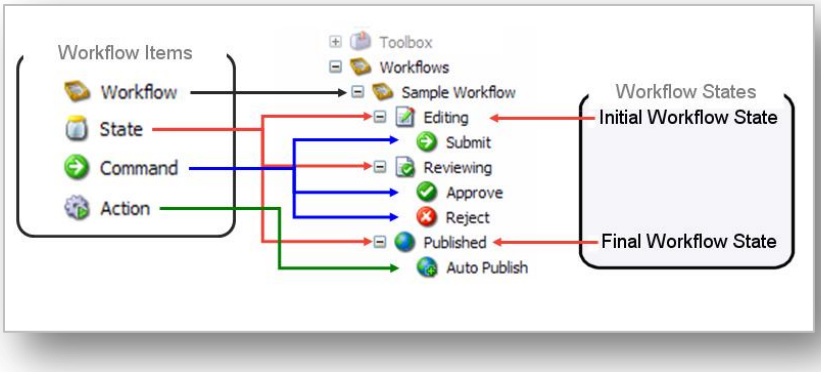
A Workflow — the main item that contains all of the subitems that make up the workflow.

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:



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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.

8.1.2 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.

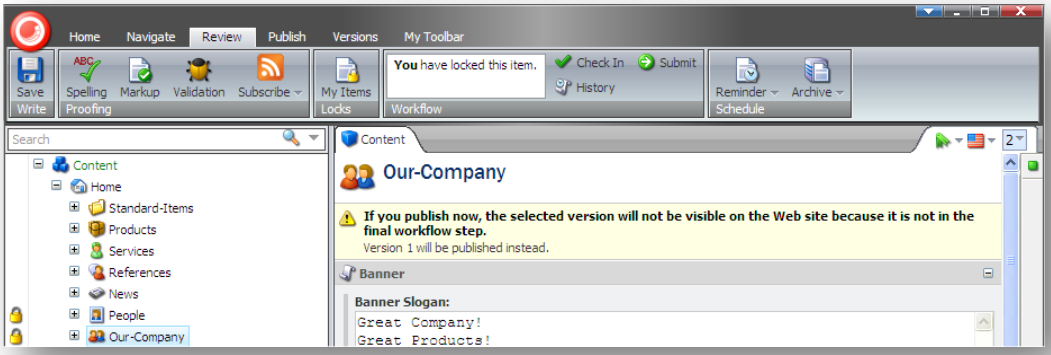
Important
Content items that are edited by administrators are not subject to workflows.

Sending Content Items through Workflows

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.

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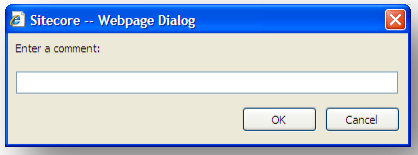
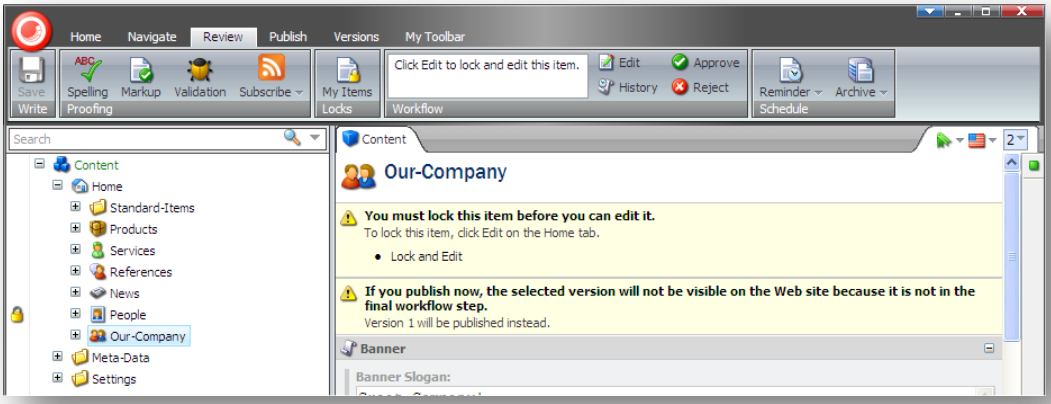
3. Click **Submit** to send the content item to the next workflow state. Sitecore displays a dialog box for you to enter a comment:



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.

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8.2 The Workbox

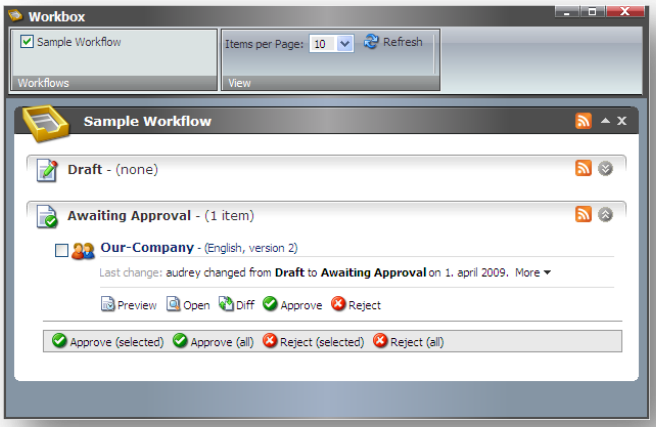
The Workbox is a tool for reviewers and managers and gives them the overview they need to perform their tasks.

8.2.1 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 **Sitecore, 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.

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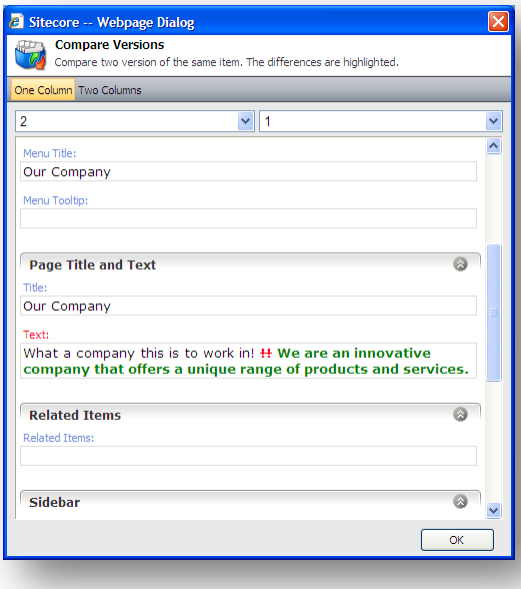
Comparing an Item

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.

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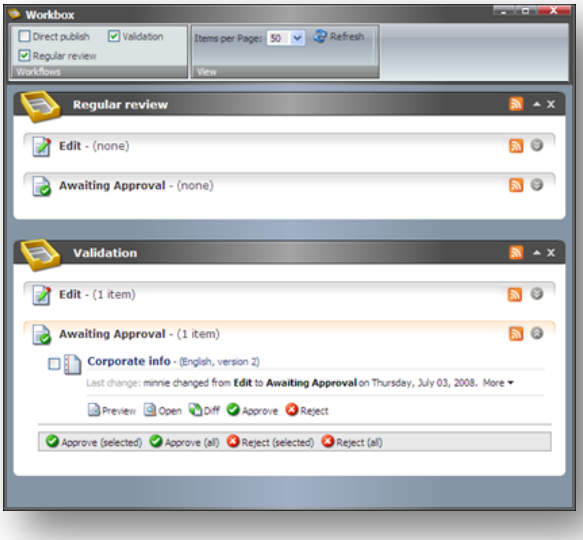
8.2.2 Several Workflows

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.

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Chapter 9

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

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9.1 Working with the Browser

All of the interfaces and programs that Sitecore contains are displayed in a normal web browser.

9.1.1 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.

9.1.2 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 Desktop.

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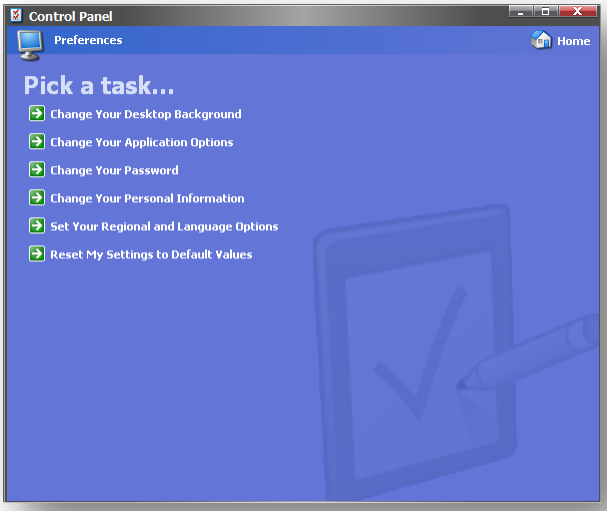
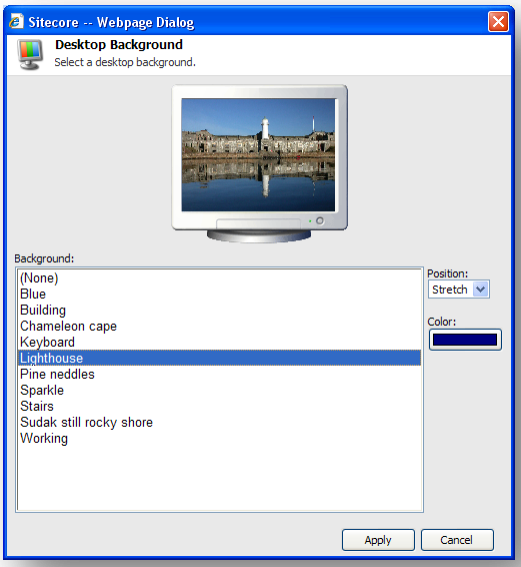
2. Click the **Sitecore** menu and then click **Control Panel, Preferences**:



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**.

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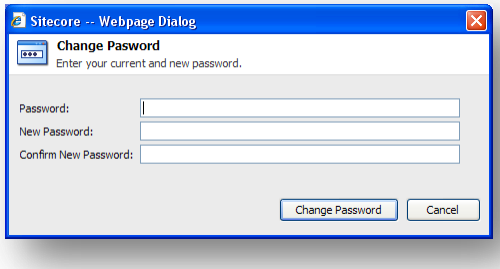
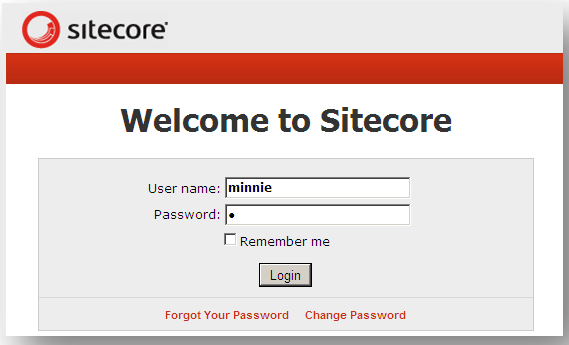
2. In the **Preferences** dialog box, click **Change Your Password**.



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**.

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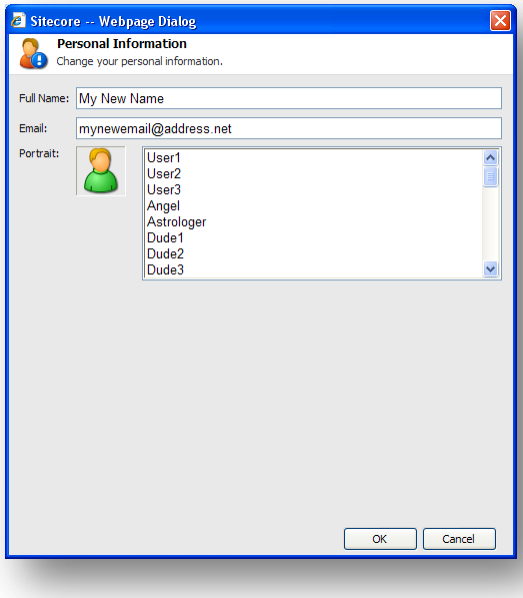
2. In the **Preferences** dialog box, click **Change Your Personal Information**.

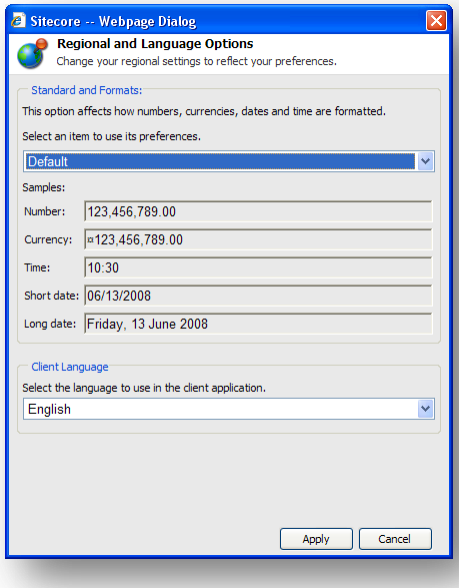


3. In the **Personal Information** dialog box, you can change your name, e-mail address, and the image that is used as your portrait throughout Sitecore.

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**.



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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**.

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9.2 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.

9.2.1 Customizing the Ribbon

There are several ways in which you can customize the ribbon.

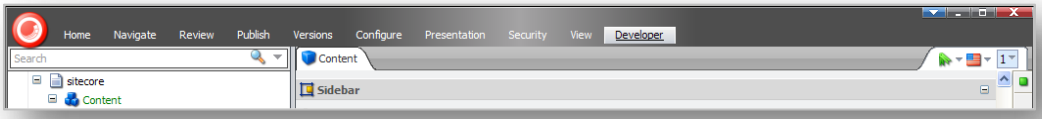
You can:

- 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.

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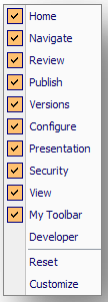
To hide a tab:

1. Right-click anywhere on the ribbon to open a dialog box:



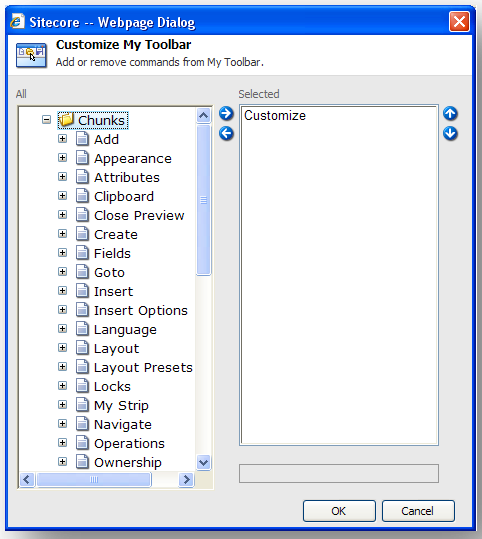
2. Select or clear the check boxes to decide which tabs you want displayed in the **Content Editor**.
3. Click reset to restore the default tab selection.

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.



1. In the **All** pane, expand the groups and select the commands that you want on your toolbar.

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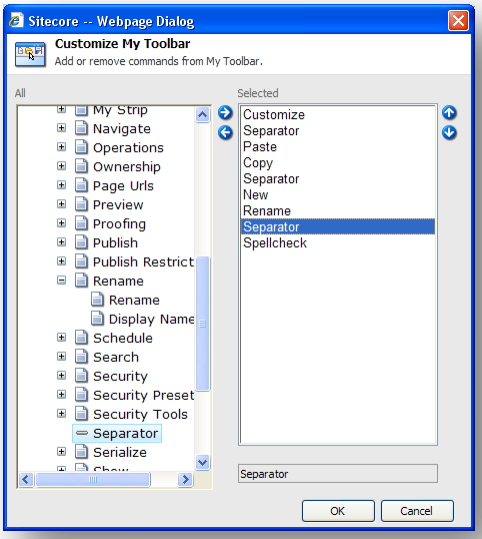
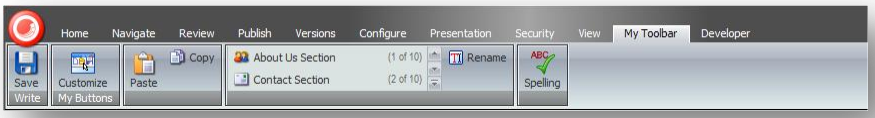
You can only select commands and not groups. You can however insert separators to divide them into groups and use the up and down arrows to place the commands in the order you want.



2. When you are finished, click **OK**.
3. 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.



9.2.2 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.

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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

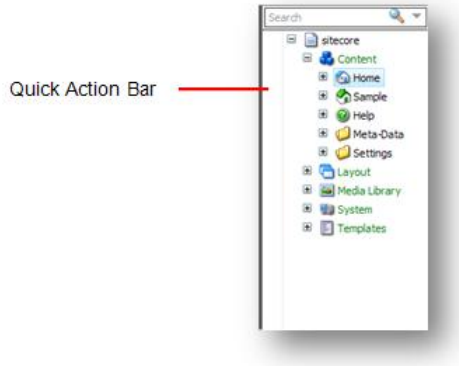
You can also resize the content tree. This can be useful when you need to find an item or when the pane takes up too much space.

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.

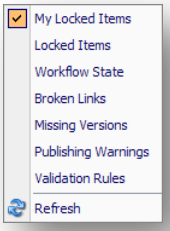
Configuring the Quick Action Bar

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
My Locked Items	Which items you have locked.
Locked Items	Which items have been locked by another user and who locked it.

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Menu Item	Tells you
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.

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.

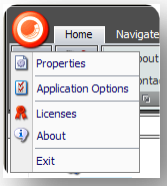
Important
The *Validation Rules* and *Broken Links* options are the most costly of the Quick Action Bar options. Each time you open an item in the content tree the client must make a server call to refresh these options.

9.2.3 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**.

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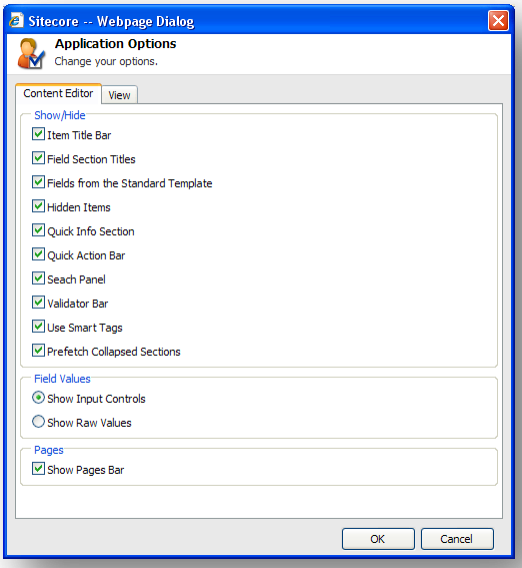
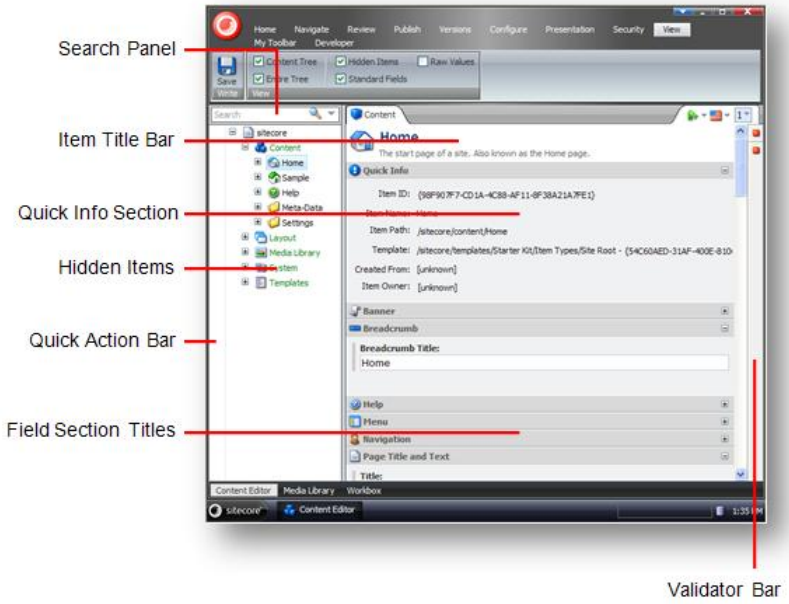
2. Click **Application Options** to open the **Application Options** dialog box.



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:

- Fields from Standard Template — selecting this option will display a large number of fields that are used internally by Sitecore. These are hidden to improve performance.

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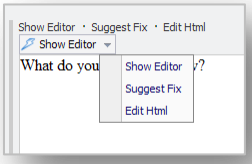
- Use Smart Tags — an alternate way to show the commands associated with a field.

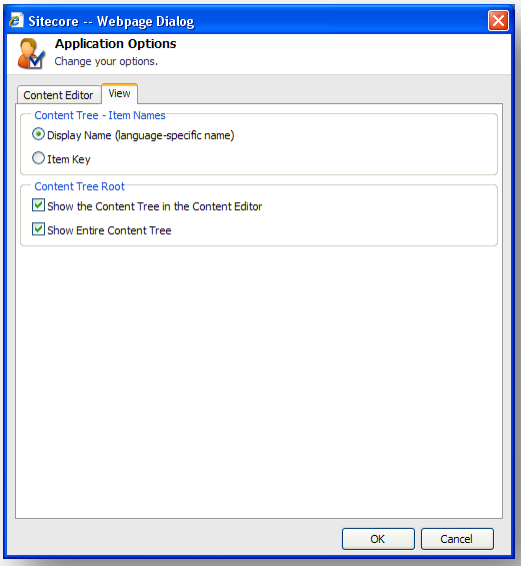


- Prefetch Collapsed Sections — the system fetches and keeps the fields from the Field Sections in memory before the section is even opened.

The other important option on the **Content Editor** tab is in the **Pages** section — Show Pages Bar.

This option determines whether or not the shortcuts to the Sitecore applications are displayed at the bottom of the screen.

The **View** tab of the **Application Options** dialog box contains a few more options.



In the **Content Tree – Item Names** section, you can specify whether you want the content tree to show the key that each item has or to show the language specific display name that you can give an item.

In the **Content Tree Root** section, you can specify whether or not you want the content tree shown in the Content Editor and whether or not you want the entire content tree shown.

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.

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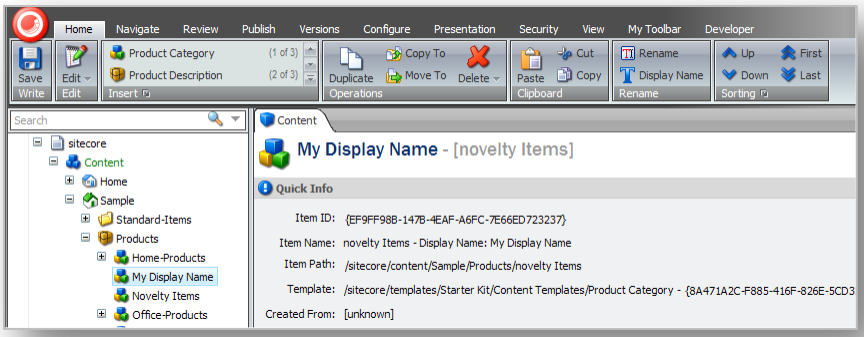
2. On the **Home** tab, in the **Rename** section, click **Display Name**.
3. When you are prompted, enter the name that you want displayed in the dialog box that appears.
4. Refresh the content tree and the display name is visible:



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.

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9.3 Customizing the Page Editor

You can customize the Page Editor, however, it has limited functionality available for you to change

9.3.1 Working with the Ribbon

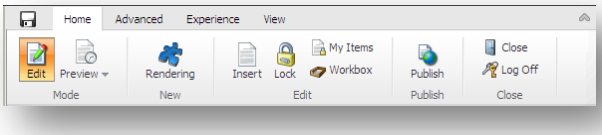
The functionality that is available to you in the Page Editor is determined by the roles that your site administrator has assigned to you.

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**.



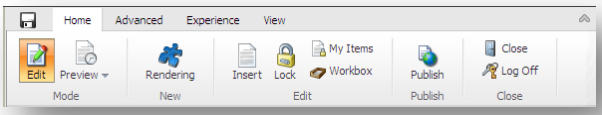
2. Click the **Toggle the ribbon** button at the top of the screen to hide the ribbon.
3. When you need to use the ribbon, click **Toggle the ribbon** button and it appears again.

Changing the Interface

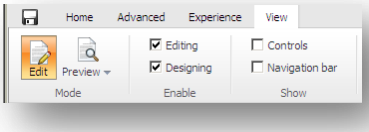
If you have access to more functionality in the Page Editor, you can also change the way the Page Editor presents editable items to you.

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.

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- 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.

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