



Sitecore CMS 6.0-6.2 Content Cookbook

Tips and Techniques for CMS Editors and Authors

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Chapter 1

Introduction

This cookbook contains tips and tutorials for Sitecore CMS content editors. The document consists of the following chapters:

- Chapter 1 – Introduction
- Chapter 2 – Managing Content
- Chapter 3 – Managing Languages
- Chapter 4 – Publishing Content
- Chapter 5 – Maintaining Search
- Chapter 6 – Administrator's Notes

1.1 Accessing Sitecore

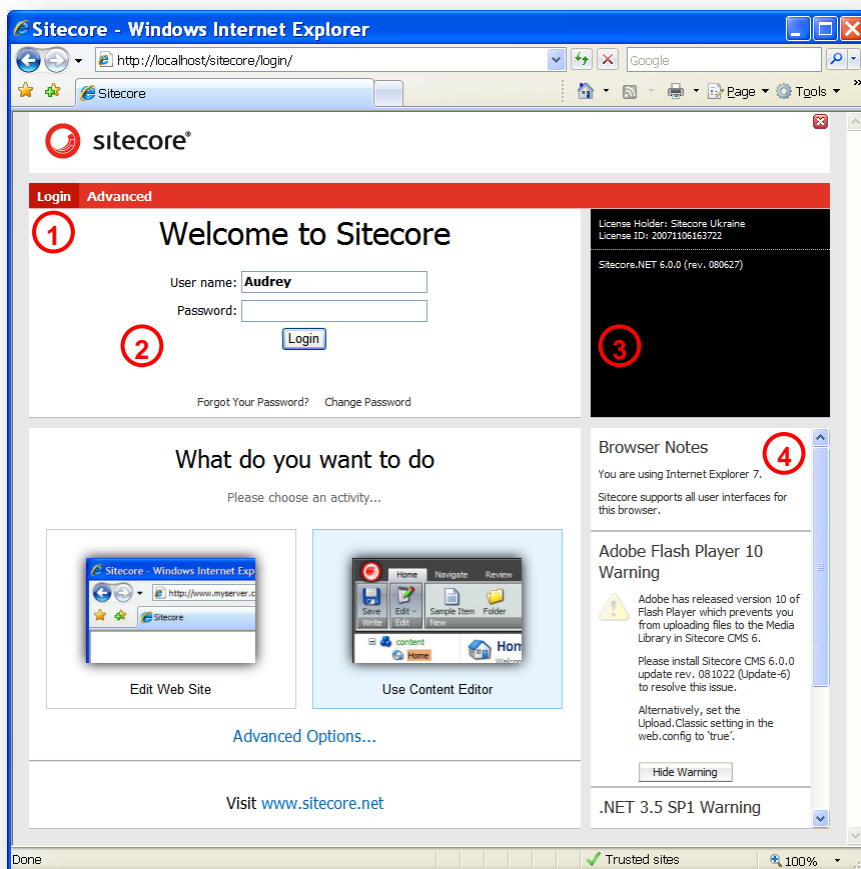
Users access the Sitecore web interfaces via the Sitecore login page. Access the login page by typing “sitecore” at the end of the base URL for the site. For example, if the site URL is:

`http://www.mysite.com/`

then you can access the Sitecore login page via:

`http://www.mysite.com/sitecore`

The login page is shown in the following image:



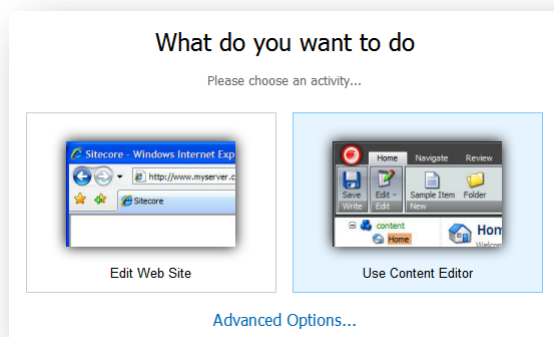
Choose the login options (described below), enter your user name and password and click “Login” to login.

The following paragraphs describe the controls and areas of the login page.

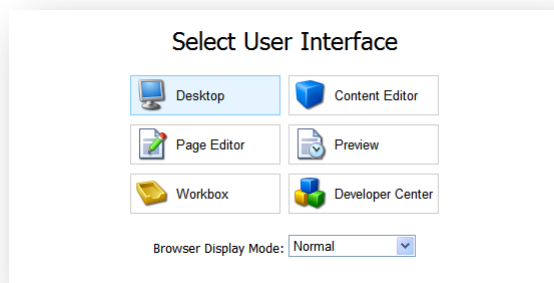
1. Login/Advanced links.

Use these links to switch between the advanced and the simple login views. The simple login view allows to choose between the Page Editor and the Content Editor while the Advanced view provides more options which determine which interface a user will see after logging in. Take a look:

Login view



Advanced view



The Advanced View is described in detail in a section further in this document.

2. Login Form.

Enter your login and password here and click the Login button to login.

Note: The username is case insensitive, while the password is case sensitive. It means that if your username is Claire, you will be successfully logged in as claire. However, if your password is MyPassword, then mypassword will not work.

Sitecore will remember the last username and other options provided.

The *Forgot Your Password* and *Change Password* links allow to retrieve a forgotten password and change your password (you need to enter the current password in order to change it).

3. License and version information.

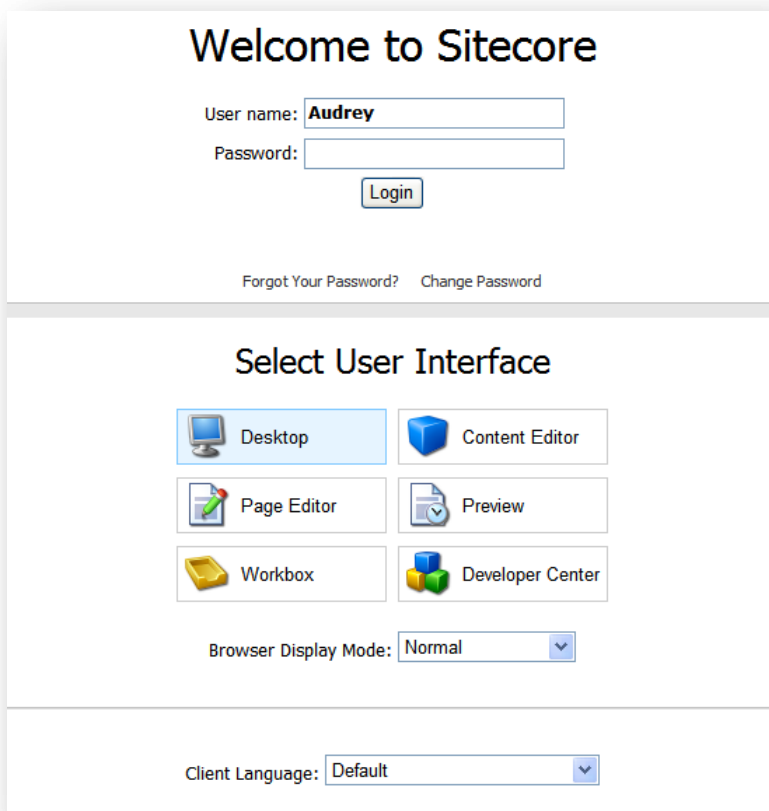
View the information about the current installation, including the exact release of Sitecore that is running.

4. Browser notes.

View the important notes concerning the browser used and other important notices.

1.1.1 Advanced Login Mode

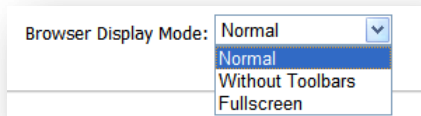
In the *Advanced Login Mode* users can select which interface to display after the username and password have been validated.



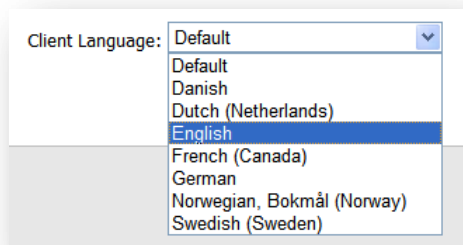
Note: Administrators may override this option for certain users, thus forcing these users to always start in a specific interface.

The Advanced mode also provides the following settings:

- Browser Display Mode.
This setting has three options: Normal, Without Toolbars, Fullscreen.



- **Client Language.**
The Client Language setting allows selecting the language in which the client functionality is displayed.



The client language selection affects only the language in which buttons and descriptions are displayed in the interface. The content language, however, is managed separately. Administrators can specify the default content language on a per-user (via the Edit User dialog) or per-site basis (via the shell site element in the web.config file).

If some of the languages do not have complete translations, English versions will be shown for items where a translation is unavailable.

“Default” means that the client language set in the User Properties for a username provided is set. The default client language for all users in Sitecore is English. However, it is possible to change the default language for a certain user.

Chapter 2

Managing Content

This chapter contains tips on managing items in the content tree, using media library, uploading files and using item versioning features.

2.1 Managing Items in the Content Tree

First off, in general, there are several ways to move/create/edit/etc items in the content tree:

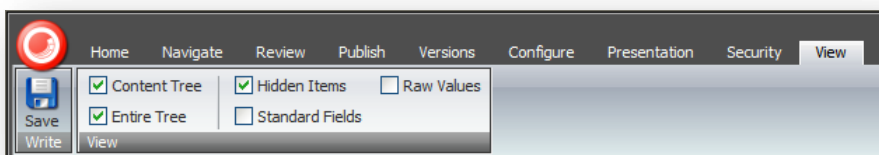
1. Use the appropriate groups and buttons on the **Home** tab.
2. Use the context menu (right-click an item).
3. Use the drag&drop feature.
4. Use the **Clipboard** group in the **Home** tab to cut/copy and paste items.

In this document, each action is usually described using the first approach in detail with some brief explanations of the other approaches.

Note:

Some parts of the Content Tree may be hidden due to the Content Editor settings.

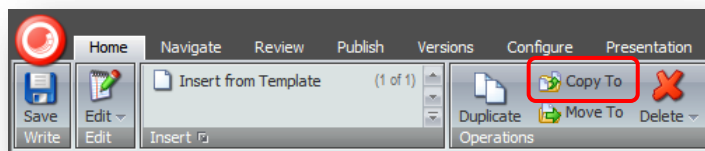
You should check the Hidden Items checkbox in the View tab to see the Layout, System and Templates items. If you do not see the Media Library in the Content Editor, check the Entire Tree checkbox.



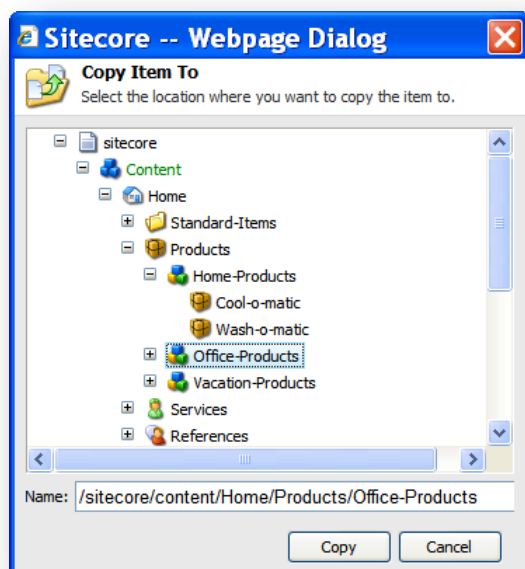
2.1.1 Copying an Item to another Location

To copy an item to another location:

5. In the content tree, select the item that you want to copy.
6. On the **Home** tab, in the **Operations** group, click **Copy To**.



7. In the **Copy Item To** dialog box, select the location that you want to copy the item to.

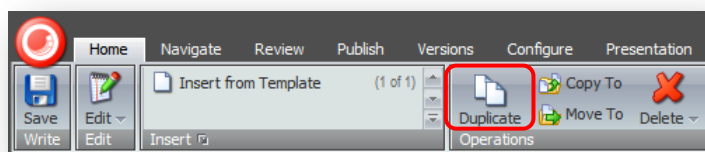


8. Click Copy and the item is copied to the specified location.

2.1.2 Duplicating an Item

To duplicate an existing item:

1. In the content tree, select the item that you want to duplicate.
2. On the **Home** tab, in the **Operations** group, click **Duplicate** and a dialog box appears prompting you to name the new item.



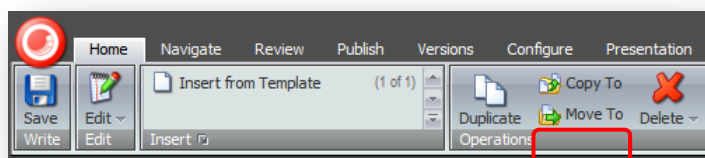
3. Enter a name for the new item and it is added to the content tree at the same level as the item you duplicated. It also contains all of the same text, images and so on as the original item.

2.1.3 Moving an Item

To move an item:

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

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

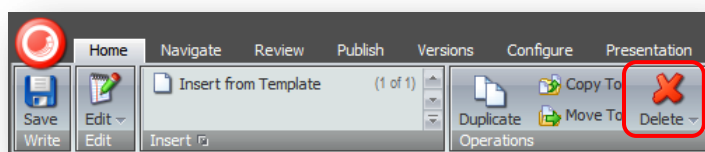


- In the **Move Item To** dialog box, select the location that you want to move the item to.
- Click Move to move the item to the new location.

2.1.4 Deleting an Item

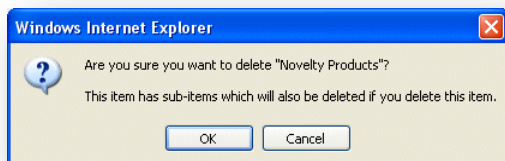
To delete an item from the Web site:

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



The item is deleted from the Web site.

If you try to delete an item that contains sub-items, a message will appear informing you that that the section contains sub-items 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 Web site. Click OK to delete the item and its subitems.

If you want to delete only the subitems of the selected item, click the *triangle* next to the *Delete* button and select the **Delete Subitems** button.



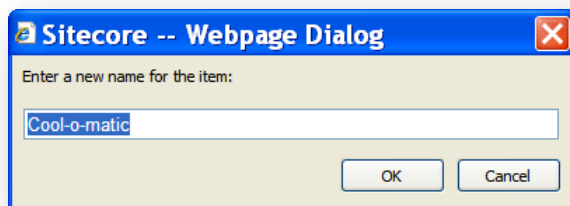
2.1.5 Renaming an Item

To rename an item:

1. In the content tree, select the item that you want to rename.
2. On the **Home** tab, in the **Rename** group, click **Rename**.



3. In the prompt dialog enter the new name and click OK.

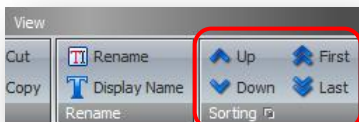


The item is renamed.

Using the **Rename** group you can also change the **Display Name** of an item.

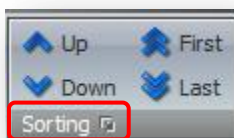
2.1.6 Sorting Items

To sort items in the content tree, use the **Sorting** group on the **Home** tab.

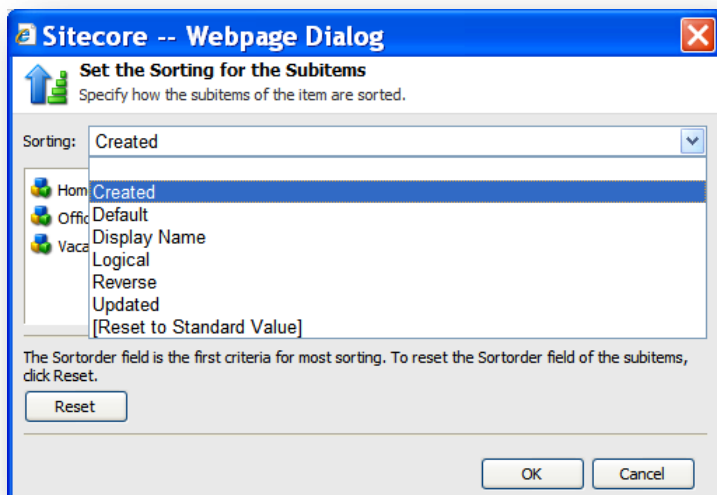


- Click **Up** to move the selected item before the previous one.
- Click **Down** to move the selected item after the next one.
- Click **First** to make the item first.
- Click **Last** to make the item last.

Click the advanced options icon to use the subitem sorting options.

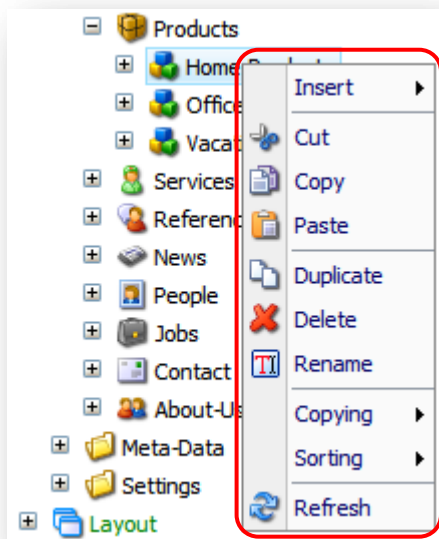


You will see the following window:



2.1.7 Using the context menu (right-click)

Right-click an item to access the context menu which allows to perform various actions:



2.1.8 Using the drag&drop feature.

Just click an item and drag it to move this item to another location.

Drag the item with Ctrl pressed to copy the item.

2.1.9 Using the Clipboard

Use the **Clipboard** group in the **Home** tab to cut/copy and paste items.



Select an item, click **Cut**, navigate to the item where you want to paste it and click **Paste** - the item you cut will be created as a child of the selected item and the original item will be removed.

Copy-Paste works in the same way but the original item is not removed.

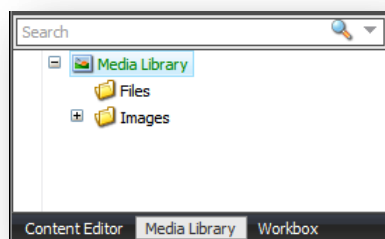
2.2 Media Library

This section describes how to access the Media Library and upload files to it.

2.2.1 How to Access the Media Library?

You can access the Media Library in the following ways:

- From the Desktop, select **Sitecore » Media Library**.
- In the Content Editor, select Media Library in the bottom bar:

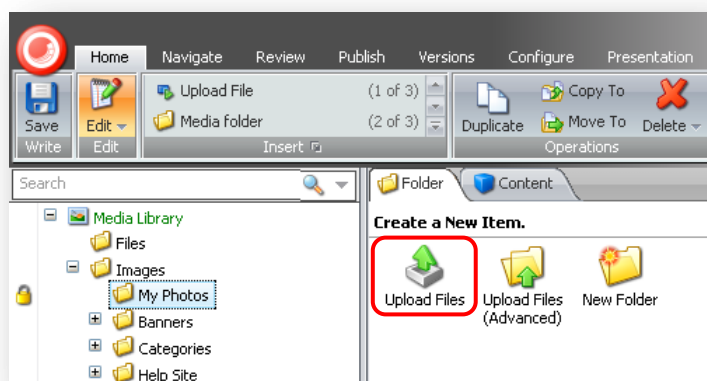


- In the Content Editor, navigate to Media Library folders in the content tree ("Hidden Items" and "Entire Tree" checkboxes must be checked in the View tab).

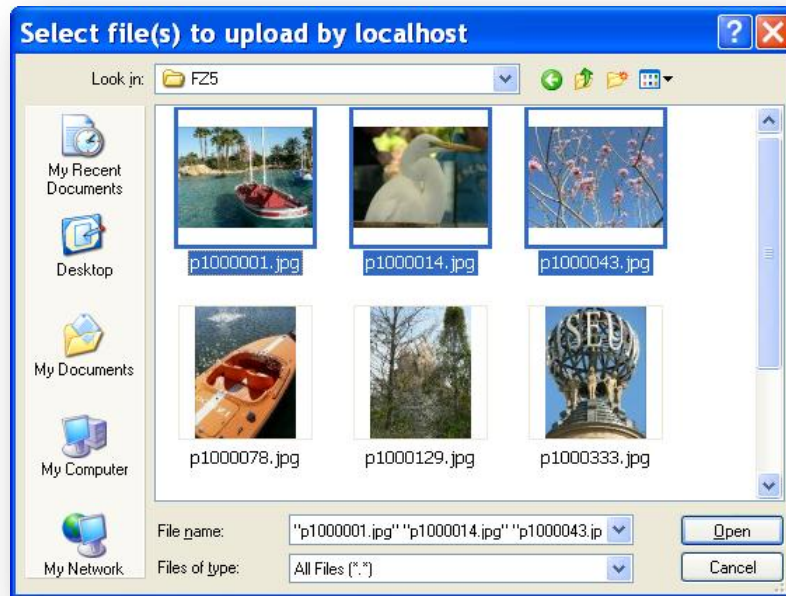
2.2.2 Uploading Files to the Media Library

To upload files to the Media Library:

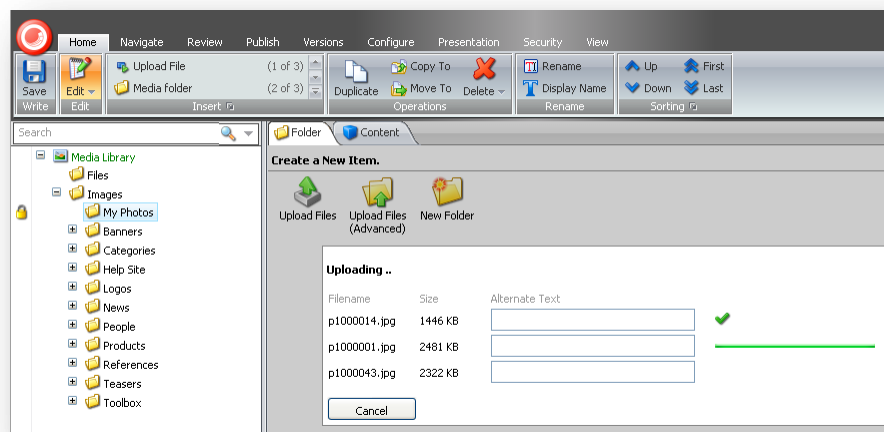
1. Navigate to a folder in the Media Library. In the right part of the screen you will see the following menu:



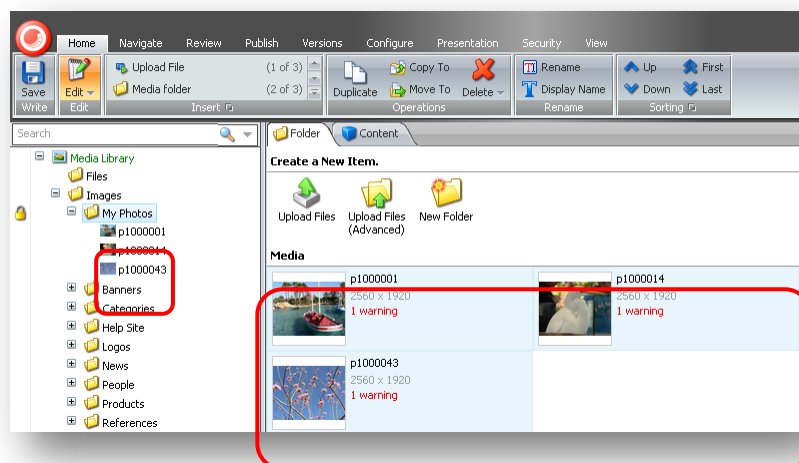
2. Click **Upload Files**. In the prompt dialog select the files you want to upload; you can select multiple files (by holding Ctrl while selecting or drawing the selection area):



Click **Open** when done, the upload process will start and you will see a similar screen:

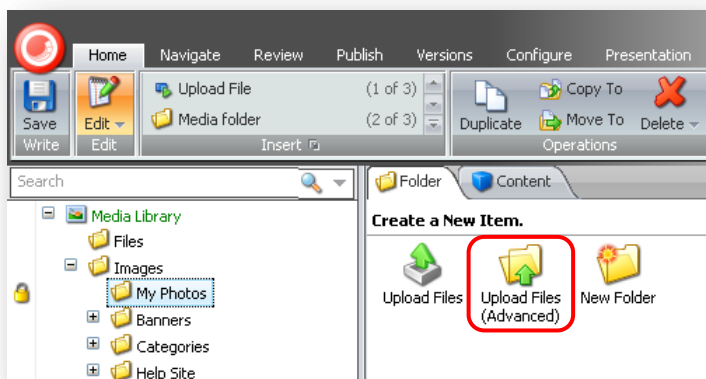


3. When the upload process finishes, review the uploaded files:

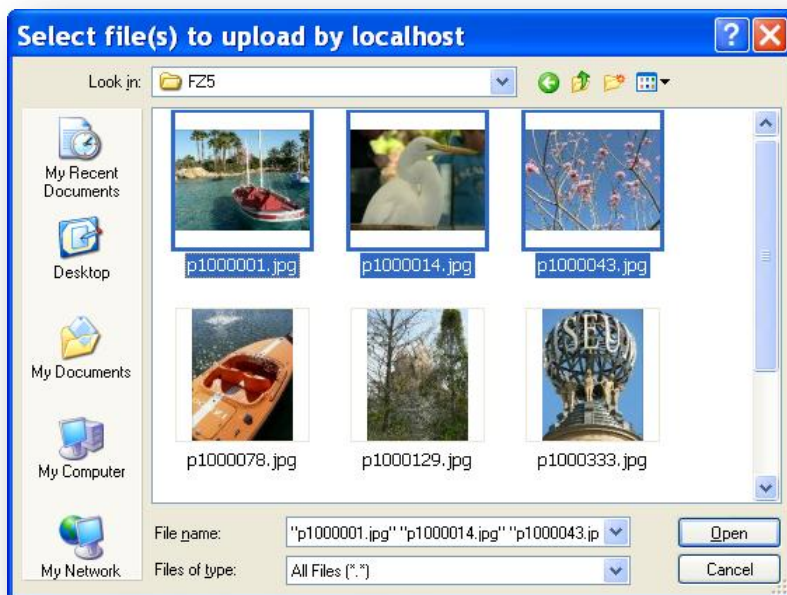


2.2.3 Advanced Upload Options

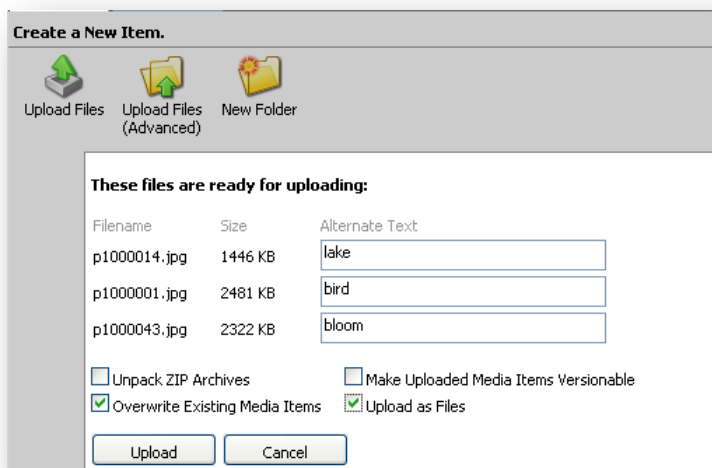
To use the advanced upload options, select the **Upload Files (Advanced)** button.



Select the files you want to upload; you can select multiple files (by holding Ctrl while selecting or drawing the selection area):



Click **Open**. The following dialog will appear:



This dialog provides the following advanced options:

Alternate Text

Use the *Alternate Text* field to enter the text for the alt tag for an image.

Unpack ZIP Archives

Use this checkbox to unpack ZIP archives after they are uploaded. The archives themselves are deleted after unpacking. If the archive contains folders, such folders will be created in the Media Library as well. This feature is extremely useful if you need to upload a big number of files.

Overwrite Existing Media Items

Check this checkbox if you want to overwrite an existing item if you upload an item with the same name. If the checkbox is not checked and the name of the file you upload coincides with the name of some item which already exists in the folder you upload to, then another item with the same name will be created.

Make Uploaded Media Items Versionable

Check this checkbox if you want to make the media items you upload versionable. By default, media items are uploaded as non versionable (as determined by the *Media.UploadAsVersionableByDefault* setting in web.config).

2.2.4 How to Upload Multiple Files in a Batch?

To upload multiple files in a batch, you should do the following:

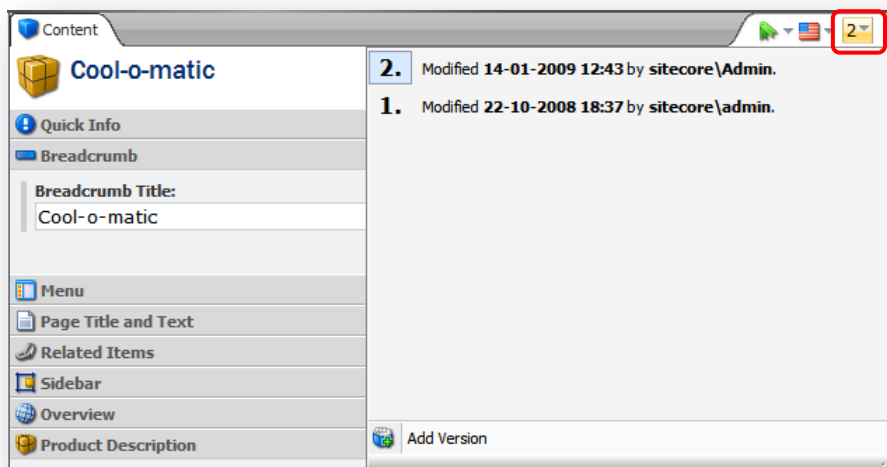
- Create a .zip archive with files you intend to upload on your disk. You can include folders with files – the folder structure will be preserved in the media library after extraction.
- In a media library folder, click the **Upload Files (Advanced)** button and select your .zip archive using the Browse button.
- Check “Unpack ZIP archives” checkbox.
- Click the Upload button. The archive will be uploaded and extracted in the currently selected media library folder.

2.3 Versioning

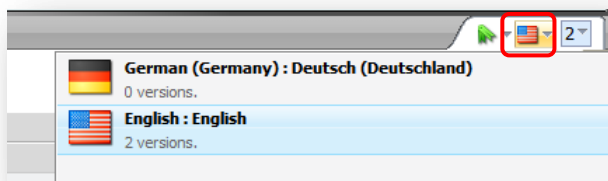
This section describes how to work with versions in Sitecore CMS.

2.3.1 How to Switch Between Versions?

To switch between numbered versions, click the numbered version button in the Content Editor and choose a version:



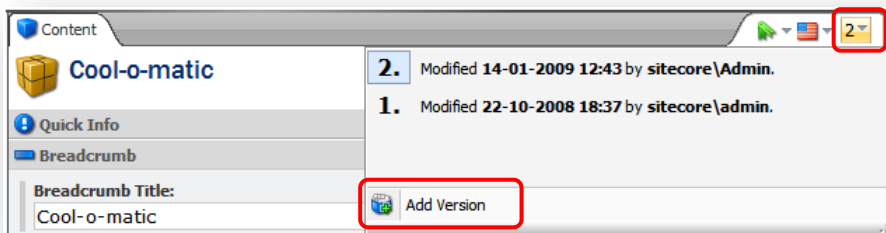
To switch between language versions, click the language version button in the Content Editor and choose a language:



2.3.2 Adding a New Numbered Version

Follow the steps below to add a new numbered version to the currently selected item.

In the Content Editor, click on the version number mark in the upper right corner of the content area. The list of versions will appear:



Click the Add Version button in the bottom of the list. The new version in the current language will be added.

Note

A new version is added by copying the currently selected version. All field values are copied.

Adding a New Numbered Version via the Ribbon

- Select the item for which you want to add a new version.
- Select the Versions tab in the ribbon.

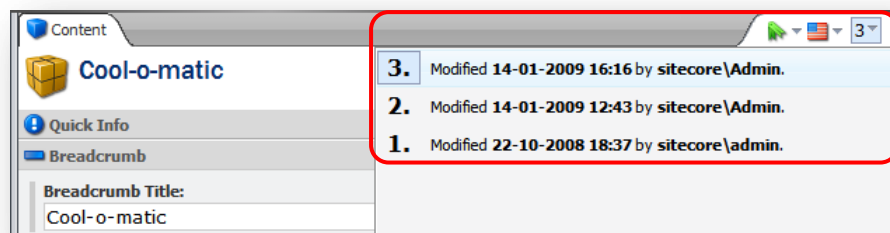


- Click the Add button in the Versions group. The new version in the current language will be added.

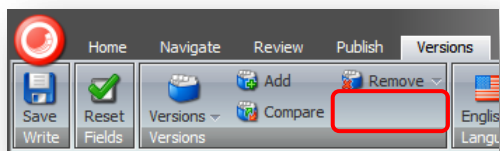
2.3.3 Removing a Numbered Version of an Item

To remove a numbered version of an item:

- Select an item.
- Select the version you want to remove.



- Click the Remove button in the Versions group of the Versions tab.

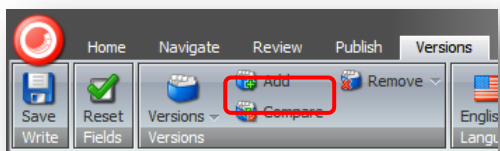


The currently active version will be removed.

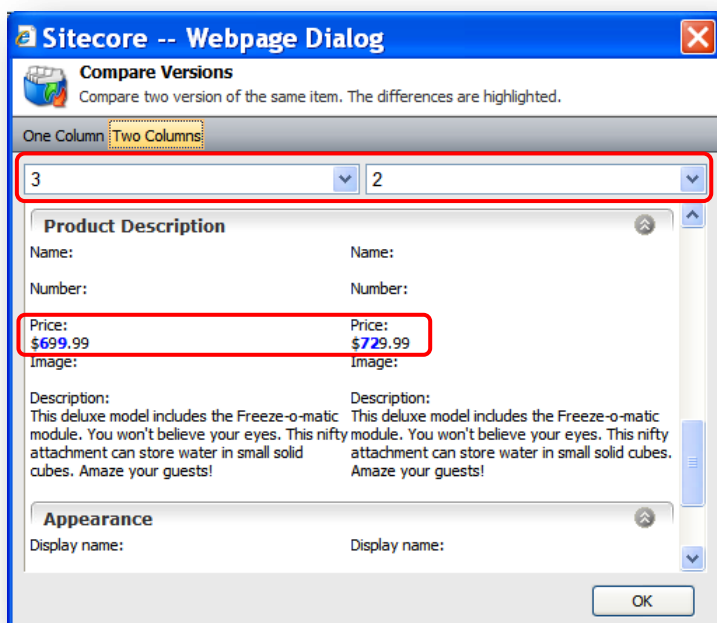
2.3.4 Checking What Has Changed Between Two Versions of an Item

To check what has changed between two versions of an item:

- Select an item in the Content Editor.
- On the **Versions** tab, in the **Versions** group, Click **Compare**.

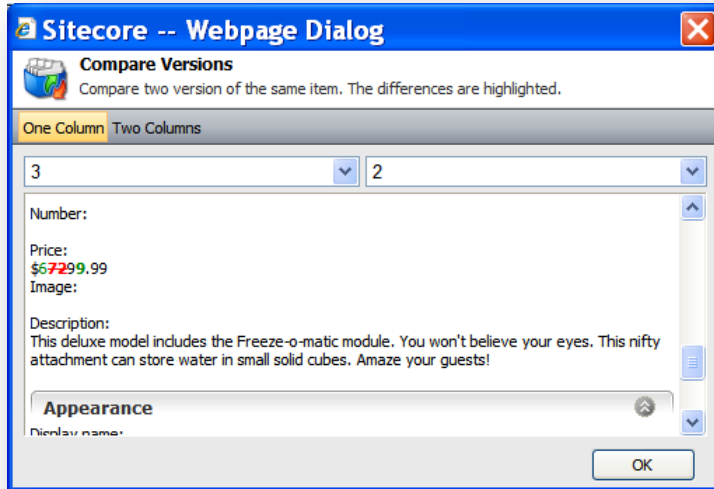


You will see the following dialog:



The dialog above shows differences between versions two and three. Changes in fields are marked with blue color.

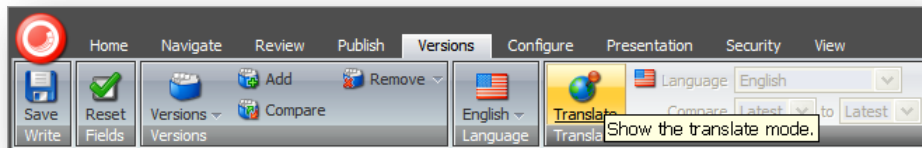
In the image above you see the two column mode. One column mode looks like this:



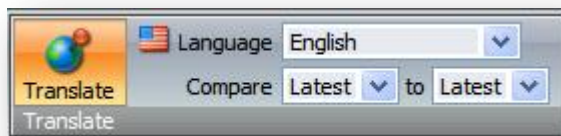
2.3.5 Translating Item Content into a Different Language

To translate an item content into a different language:

- Select an item you want to translate.
- On the **Versions** tab, in the **Translate** group, Click **Translate**.

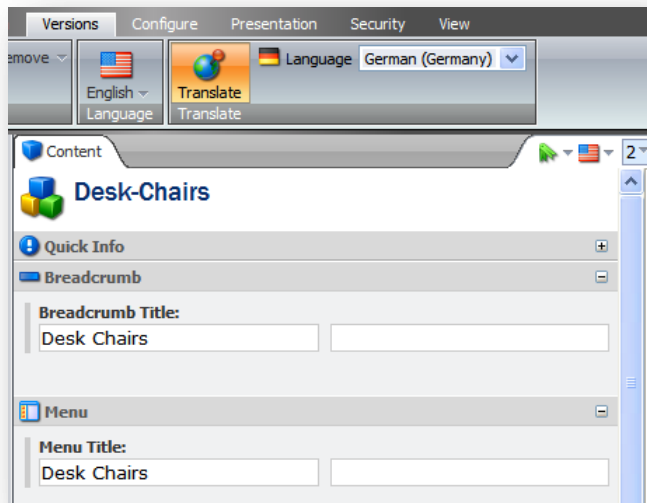


Once Translate is clicked, the Translate group options becomes active:



- Choose a language in the **Language** field. You will see the fields in this language in the right column (see the image below):





Enter the translated text in these fields.

In the Translate group you can also see the **Compare** fields. You can use these fields to compare different versions of the item right in the Content Editor window, but as against to the Compare button in the Versions group, this feature does not highlight the differences.

2.3.6 How is a New Language Version Created?

To add a version in a different language, you should switch to this language in the **Language** group of the **Versions** tab and add a numbered version. This numbered version will be created in the currently selected language.

The following chapter describes how to add a new language.

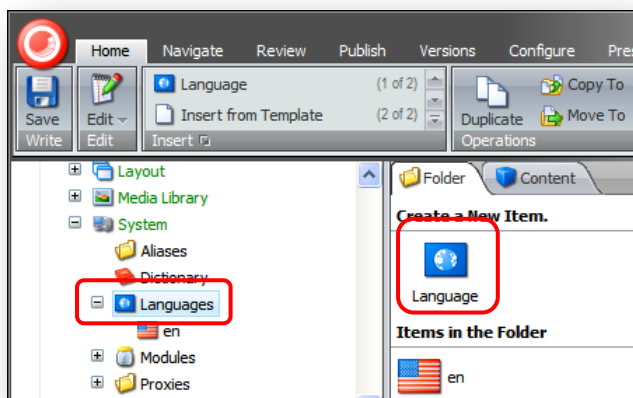
Chapter 3

Managing Languages

This chapter describes how to add and remove languages in Sitecore CMS.

3.1 How to Add a New Language?

To add a new language, select the **/sitecore/system/Languages** item and add a new language using the Language template:



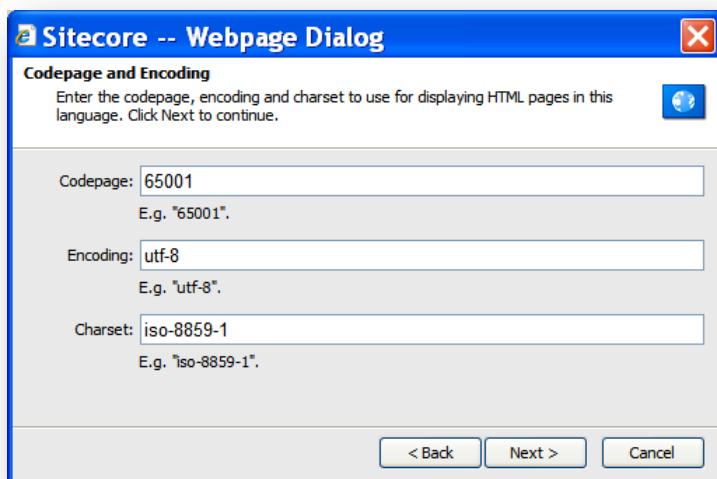
When you select the **Language** template, the following dialog appears:



In the topmost field select the language you want to add, when you do this all other fields except for the Custom Code field will be filled automatically.

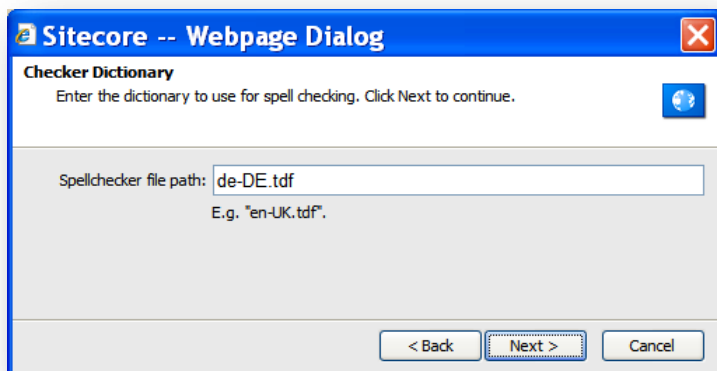
Click **Next**.

The Codepage and Encoding dialog will appear with the default settings for the selected language entered:

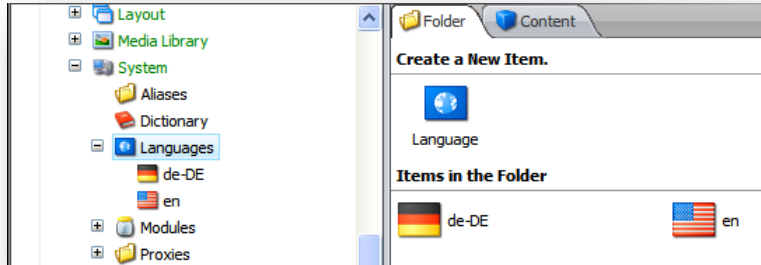


Click **Next**.

The **Spellchecker Dictionary** dialog will appear with the default setting entered:



Click **Next**, view the final window and click **Finish**. The language is added:



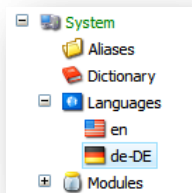
Alternatively you can add a language via the **Control Panel**:

- Open **Sitecore » Control Panel » Globalization » Add a New Language**. This will start the same dialog as described above.

3.2 How to Remove a Language?

To remove a language from a Sitecore CMS solution:

1. Under the **/sitecore/system/Languages** item, select a language you want to remove.



2. Select **Delete** in the **Home** tab, just like you would do with a usual item.
3. In the prompt dialog, confirm that you want to delete the item and the following dialog will appear:



Click OK to proceed. The language and all content in this language will be removed.

Note

Removing a language from a Sitecore CMS solution will remove all the content in this language from every item.

Alternatively you can remove a language via the Control Panel.

- Open **Sitecore » Control Panel » Globalization » Delete a Language**. This will start the same dialog as described above.

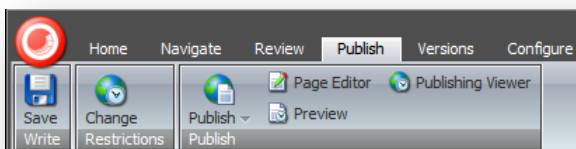
Chapter 4

Publishing Content

This section provides instructions on various actions related to publishing.

4.1 How to Publish an Item or a Whole Site?

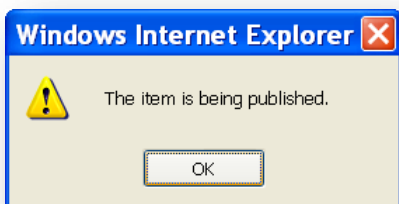
To publish an item, on the **Publish** tab, in the **Publish** group, click **Publish**.



The following dialog will appear:

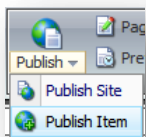


Click OK. The following dialog will appear:



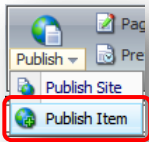
Click OK, the publishing process will run in the background and in a short period of time (the period depends on the current publish queue and server performance, but generally the published content appears in the target database within a few seconds).

The Publish button has a submenu which provides additional options described in the following sections:

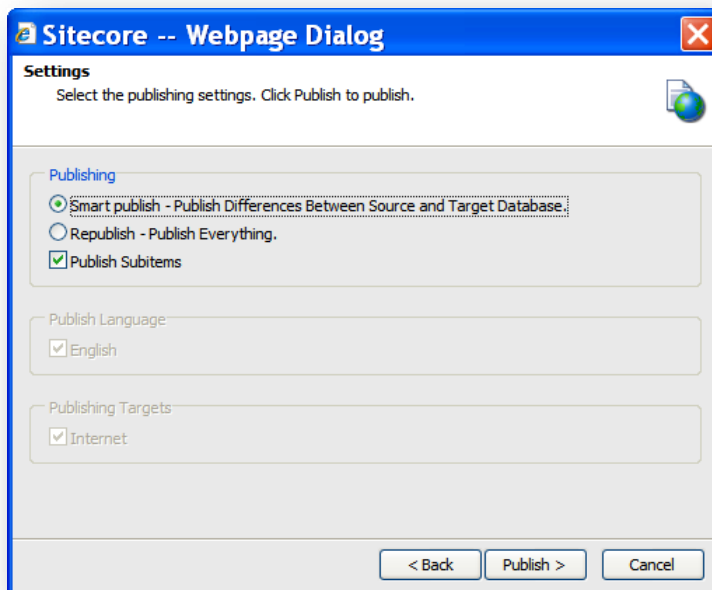


4.1.1 Publishing an Item with Advanced Options

To publish an item with advanced options, select the **Publish Item** sub option:



The following dialog will appear:

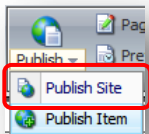


Choose the options necessary and click **Publish**.

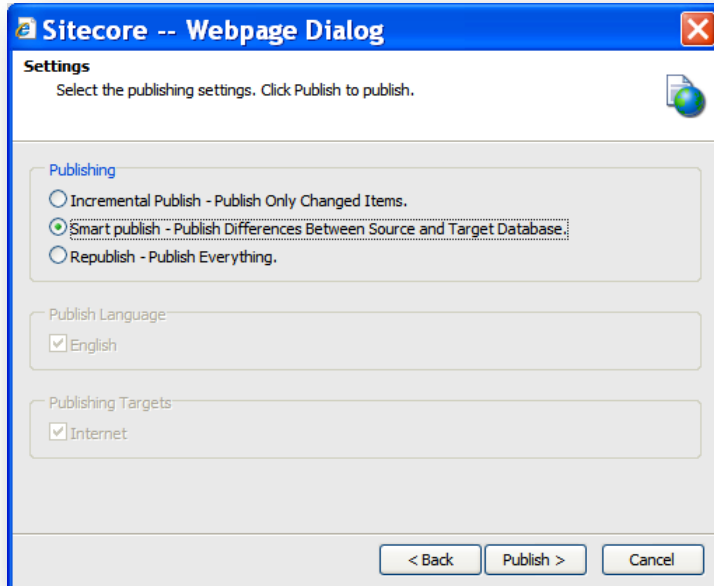
Review the summary dialog and click **Finish**.

4.1.2 Publishing the Whole Site

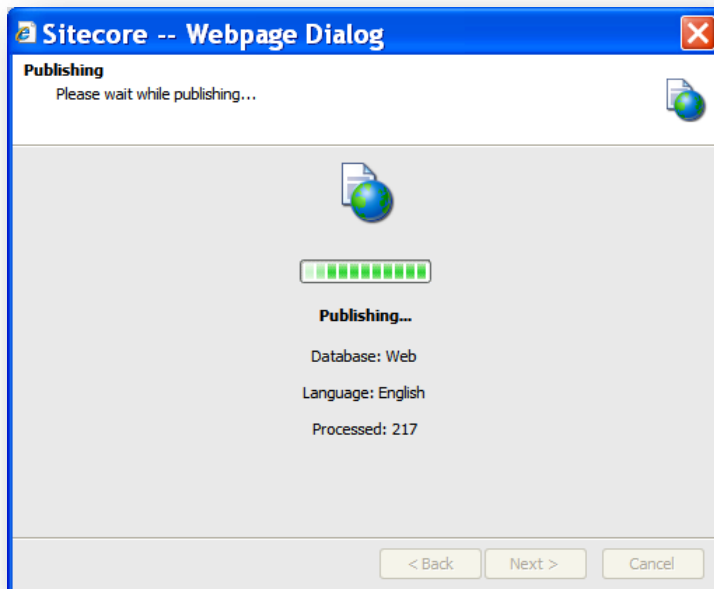
To publish the whole site, select the **Publish Site** sub option:



The following dialog will appear:



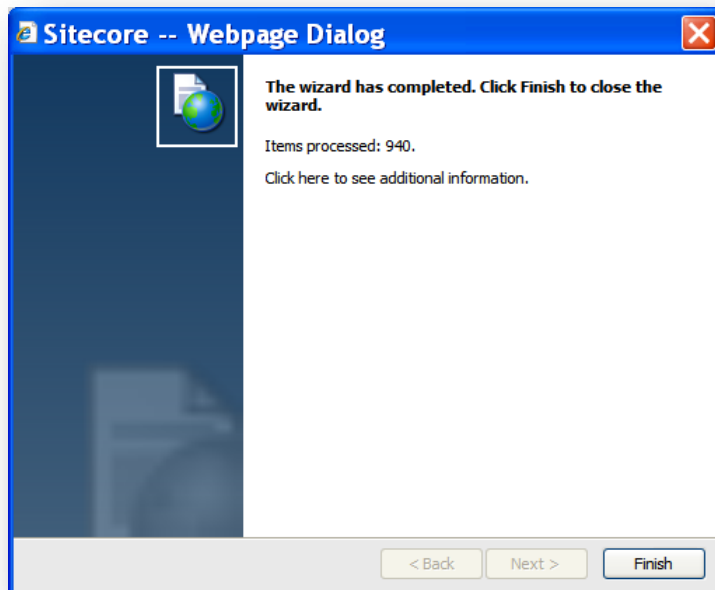
Choose the options necessary and click **Publish**. The following window will appear:



Note

You may close the publishing dialog before the process is completed. The publishing will continue anyway, but you will not see the summary window.

When the publishing process will be completed, the summary window will appear.



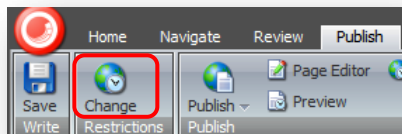
Review the window and click **Finish**.

4.2 How to Hide a Version of an Item?

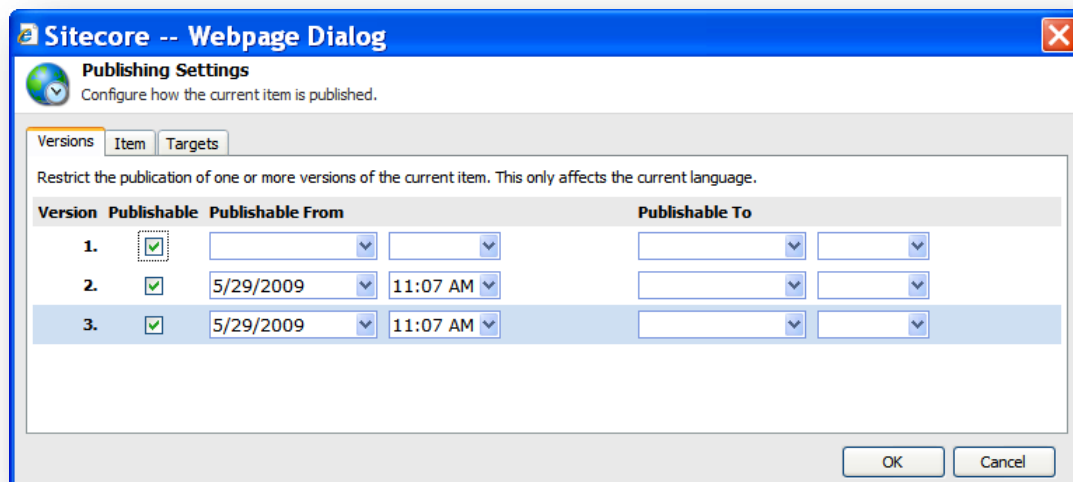
If an item has multiple versions, the last version by number is published unless it is hidden or has other publishing restrictions.

To hide a version of an item:

1. On the **Publish** tab, in the **Restrictions** group, click the **Change** button:



2. The following window will appear:

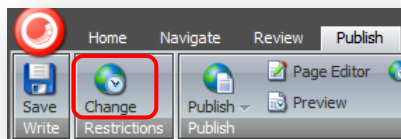


3. To hide a version of the item, clear the checkbox in the **Publishable** column next to the version number.
 If you want to hide the version of the item **until a certain date**, check the Publishable checkbox and set the appropriate date and time in the **Publishable From** field.
 If you want to hide the version of the item **after a certain date**, check the Publishable checkbox and set the appropriate date and time in the **Publishable To** field.
4. Click **OK**.
5. Save the item.
6. The appropriate version will be put into the web database when the next publishing operation is performed. For instance, if you have cleared the Publishable checkbox for version 3, version 2 will be put into the web database (if it does not have restrictions in one's turn).

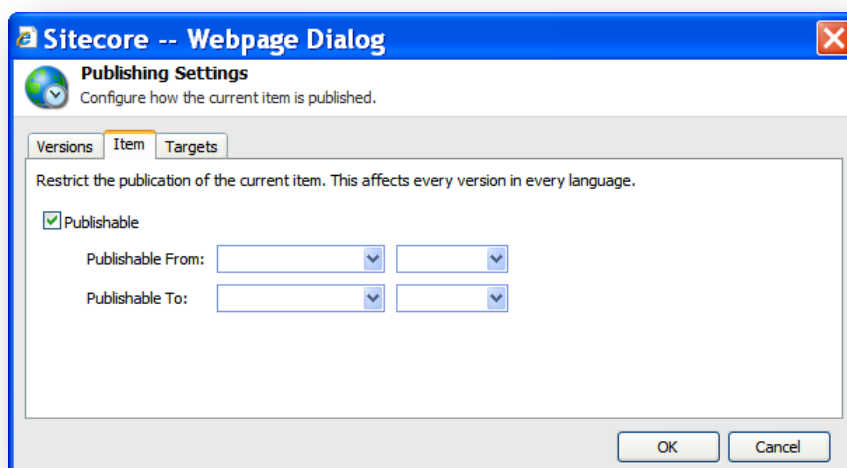
4.3 How to Unpublish an Item?

To unpublish an item and all of its versions:

1. On the **Publish** tab, in the **Restrictions** group, click the **Change** button:



2. In the prompt window select the **Item** tab:



3. To unpublish the item, clear the **Publishable** checkbox.
If you want to unpublish the item **until a certain date**, check the Publishable checkbox and set the appropriate date and time in the **Publishable From** field.
If you want to unpublish the item **after a certain date**, check the Publishable checkbox and set the appropriate date and time in the **Publishable To** field.
4. Click **OK**.
5. Save the item.
6. The item will be removed from the web database when the next publishing operation is performed.

4.4 How to Schedule Item Publication?

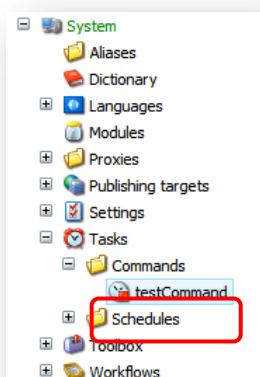
Scheduling an item publication is implemented using the Sitecore Scheduled Tasks functionality and requires some coding. The following example shows how to set up a sample scheduled task which starts on a certain time and writes a message to file. In order to publish an item using such approach you should write a class which implements publishing instead of the class shown in the example.

The following steps describe how to configure such a task:

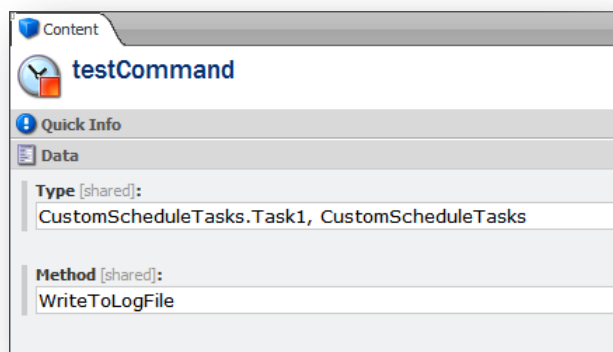
1. Create your own class. This class must implement at least one public method with the following parameters:

```
using System;
using Sitecore.Data.Items;
using Sitecore.Tasks;
namespace CustomScheduleTasks
{
    public class Task1
    {
        public void WriteToLogFile(Item[] itemArray, CommandItem
commandItem, ScheduleItem scheduledItem)
        {
            Sitecore.Diagnostics.Log.Info("Test Scheduled task:
"+DateTime.Now, this);
        }
    }
}
```

2. Compile this assembly and put the resulting file, for example: CustomScheduleTasks.dll, into the /bin folder under the Sitecore web root.
3. In the Content Editor navigate to the System item, locate the **/System/Tasks/Commands/** folder and create a new item based on the **/sitecore/templates/System/Tasks/Command** template.



- Fill in the fields of the command item:

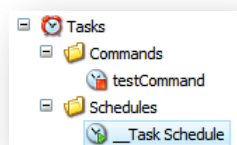


The screenshot shows the 'testCommand' item in the Sitecore Content Editor. The 'Data' tab is active, displaying the following fields:

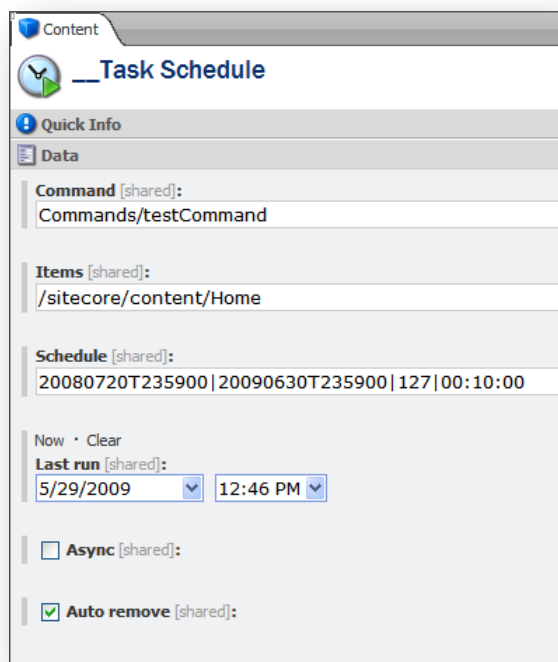
- Type [shared]:** CustomScheduleTasks.Task1, CustomScheduleTasks
- Method [shared]:** WriteToLogFile

The Type field holds the %namespace.class%, %assembly name% value. The Method indicates the method to call from the specified class. Your command is now ready to use as a scheduled task.

- Navigate to the **/System/Tasks/Schedules/** folder and create the new item based on the **/sitecore/templates/System/Tasks/Schedule** template.



- Fill in the fields of the schedule item:



The screenshot shows the configuration for a new '__Task Schedule' item in the Sitecore Content Editor. The 'Data' tab is active, displaying the following fields:

- Command [shared]:** Commands/testCommand
- Items [shared]:** /sitecore/content/Home
- Schedule [shared]:** 20080720T235900|20090630T235900|127|00:10:00
- Last run [shared]:** 5/29/2009 12:46 PM
- Async [shared]:** ☐
- Auto remove [shared]:** ☒

Command: select command created in the previous step.

Items: if you want to pass an array of items to your method you can place any XPath expression here. Multiple items can be divided by the pipe separator. For example:
/Sitecore/content/Home/Globals/Item1/Sitecore/content/Home/Globals/Item2.

Schedule: 20080720T235900|20090630T235900|127|00:10:00.

In this example, the task will be executed from 2008.07.20 23:59:00 to 2009.06.30 23:59:00, every day (as specified by the number 127) and every 10 minutes (as specified by 00:10:00).

In the Schedule field you can place 4 parameters divided by pipe separators:

From Date|To Date|Day of the Week|Period of time

For the day of the week DaysOfWeek enumeration is used. For example for Monday and Friday you should write 34 (2+32)

```
public enum DaysOfWeek
{
    None = 0,
    Sunday = 1,
    Monday = 2,
    Tuesday = 4,
    Wednesday = 8,
    Thursday = 16,
    Friday = 32,
    Saturday = 64,
}
```

Period of time has the following format: hh:mm:ss.

Auto Remove: if this field is checked, then the schedule item will be removed (deleted) after it is completed.

7. Set the necessary frequency and interval parameters in the web.config:

```
<scheduling>
  <!-- Time between checking for scheduled tasks waiting to execute -->
  <frequency>01:00:00</frequency>

  <!-- Agent to process schedules embedded as items in a database -->
  <agent type="Sitecore.Tasks.DatabaseAgent" method="Run"
interval="01:00:00">
    <param desc="database">master</param>
    <param desc="schedule root">/sitecore/system/tasks/schedules</param>
    <LogActivity>true</LogActivity>
  </agent>
  ...
</scheduling>
```

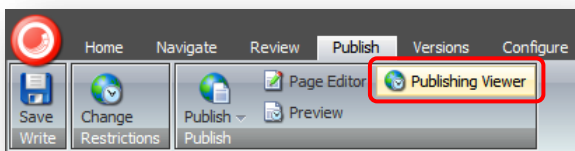
Note

In the environments with many instances, this task will be performed on each instance that is connected to the database that contains the item task. This can lead to unexpected results, such as wrong publishing or republishing of the same items if the task is designed for publishing operations. Additional checks must be added to ensure that the task runs only on one instance.

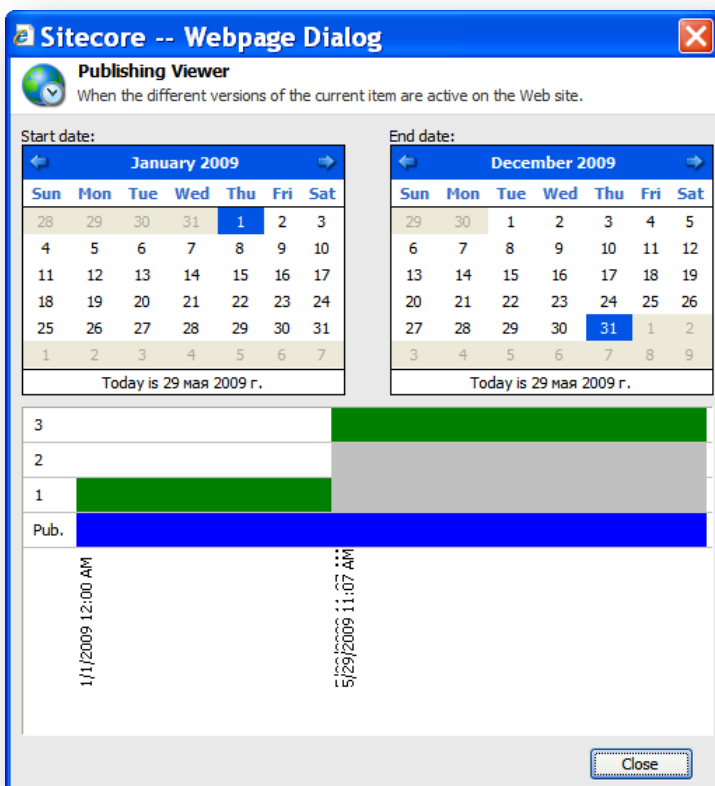
4.5 How to See Which Version of an Item Will be Published?

To see which version of an item will be published on a certain time you should open the Publishing Viewer application.

On the Publish tab, in the Publish Group, select the Publishing Viewer application:



The following window will appear:



Use the **Start Date** and **End Date** calendar fields to select the time span you want to view.

The bars in the lower part of the window indicate whether the item or its versions can be published.

The bar coloring follows the code:

- Green: The version is active and valid for publish.
- Gray: Inactive. The version is typically superseded by a newer version.
- Blue: The period where the item is valid. It is not necessarily published.

Chapter 5

Maintaining Search

This chapter contains notes about maintaining the search functionality in Sitecore CMS.

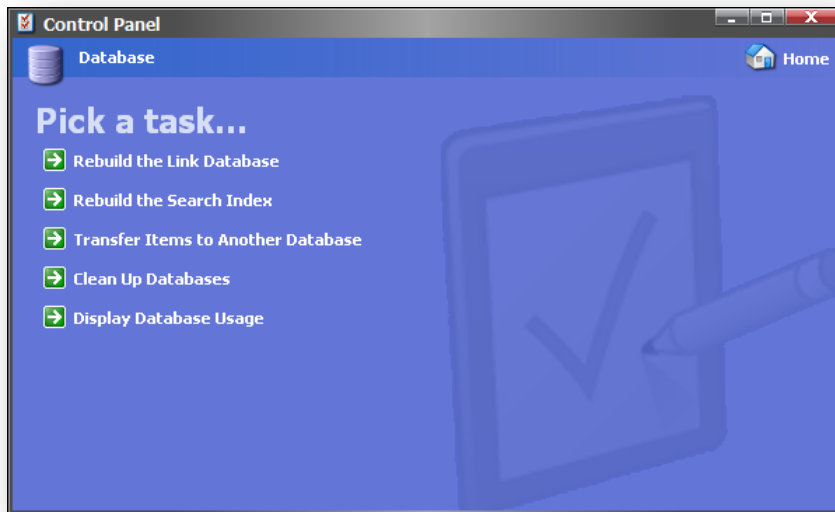
5.1.1 How to rebuild the Search Index and the Link Database?

The Search Index and the Link Database can be rebuilt via the Control Panel.

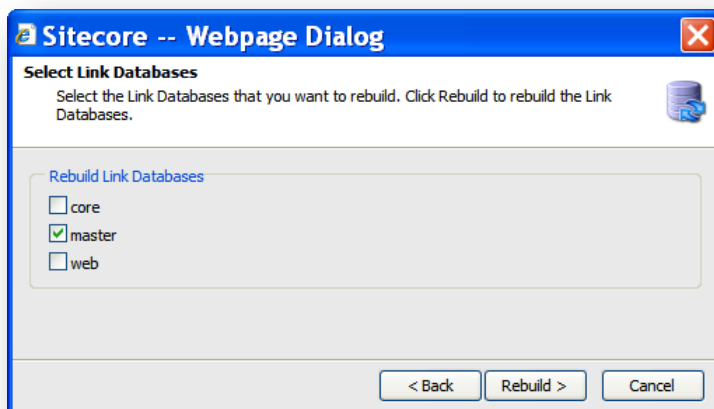
Open the Control Panel (**Sitecore » Control Panel**):



Select the **Database** section:

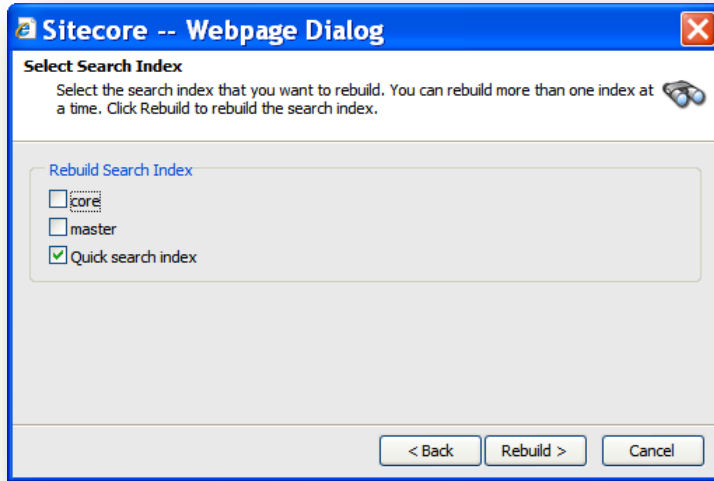


Select the Rebuild the Link Database link to rebuild the Link Database:



Choose the databases where the Link Databases should be rebuilt and click Rebuild.

Select the Rebuild the Search Index link to rebuild the Search Index:



Choose the databases where the indexes should be rebuilt and click Rebuild.

Chapter 6

Administrator's Notes

Useful tips and notes for administrators.

6.1 Customizing Login Page

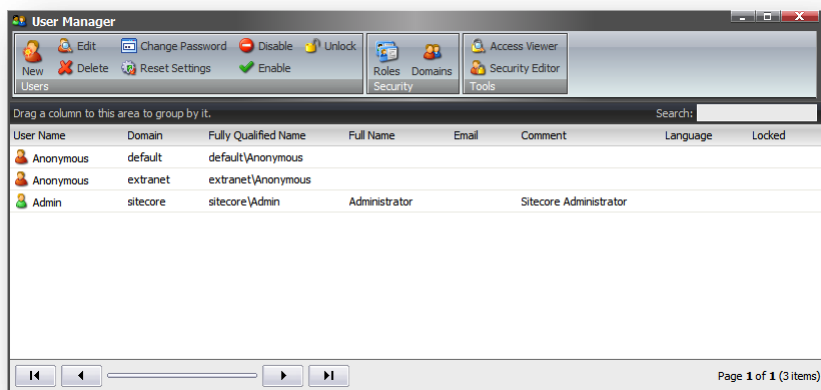
Developers may choose to customize the login page for your site. Therefore, the login page you see may differ from the one shown in the screenshot above. Developers can choose simple changes, such as changing the “Welcome to Sitecore” title or provide additional text by modifying the “WelcomeTitle” and “WelcomeText” settings in the web.config.

Developers may also choose to make more significant changes to the login page by modifying the associated .aspx, .js, .css, or image files associated with the page. The source of these related files is under the Sitecore web root in the **/sitecore/login** folder.

6.2 Changing the Default Client Language

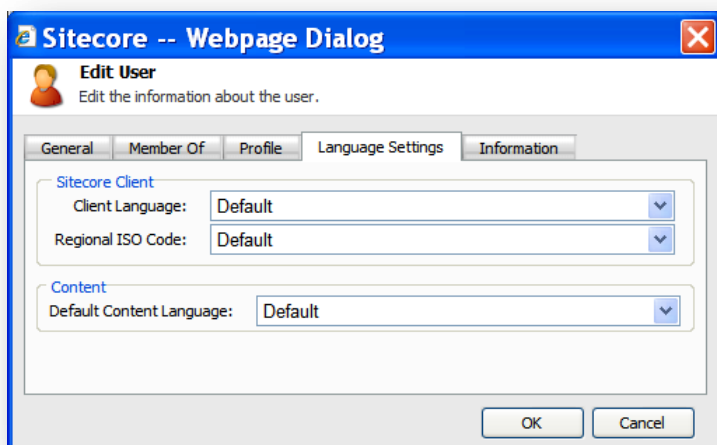
The default client language for all users in Sitecore is English. However, it is possible to change the default language for a certain user. To do that, follow the steps below:

Start the User Manager application: **Sitecore » Security Tools » user Manager**.



Select the user for whom you want to change the client language and click **Edit** in the Users group.

The Edit User window will appear. In this window select the Language Settings tab:



In the Client Language field set the needed value.