# Sitecore Advanced Concepts V 8.0

User Guide

Douglas College 6/10/2015



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#### 1.0 Using the Content Editor

Unlike the basic user manual, the topics in this guide refer to using the Content Editor interface. The Content Editor is a more powerful interface, and provides another way of looking at the same content you see in the Page Editor interface. So while the look of Sitecore may be different, the content you access is the same.

#### 1.1 Log into the Content Editor interface

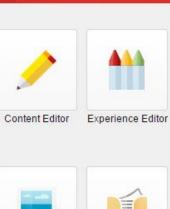
1. In your Web browser, open <a href="https://authoring.douglascollege.ca/sitecore/login">https://authoring.douglascollege.ca/sitecore/login</a>



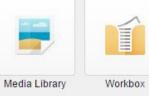
- In the User Name text field, put in your Douglas College login ID (do not include @douglascollege.ca at the end)
- 3. In the **Password** field, enter your Douglas College password. Click the blue Log in button. You will see the Sitecore Experience Platform:



# Sitecore Experience Platform







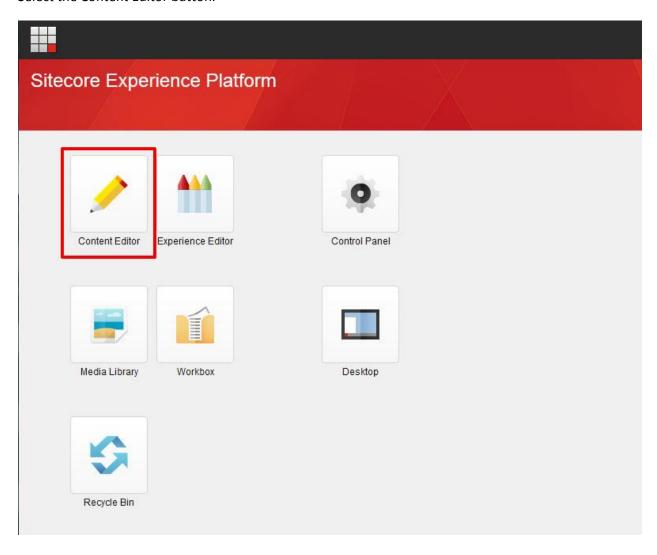




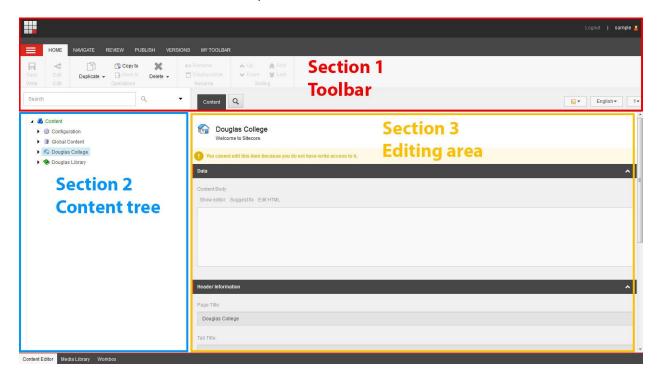
Recycle Bin

# 1.2 Basic Content Editing in the Content Editor

Select the Content Editor button.



The Content Editor is divided into three parts:



**Section 1** is the **Toolbar**. It contains the functions you can use on a specific page. Functions such as Edit and Publish are available in this tabbed toolbar.

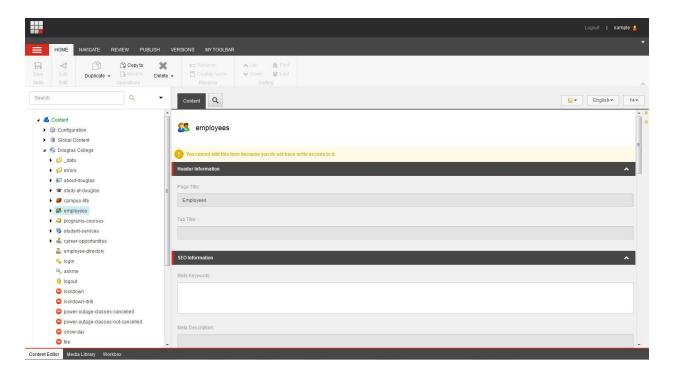
**Section 2 is the Content Tree**. This displays a hierarchical view of all the web pages in the Douglas College website. You may recognize this from creating links to other pages in Sitecore. In the Content Editor, it's used to navigate to the page you want to edit.

**Section 3 is the Editing Area**. When we navigate to a new page, this section will reload with the appropriate fields (Page title, Content, etc.) for that page.

#### 1.2.1 Editing a page in the Content Editor

To edit a page in the Content Editor, we need to navigate to the page using the Content Tree, and then we need to edit the appropriate fields.

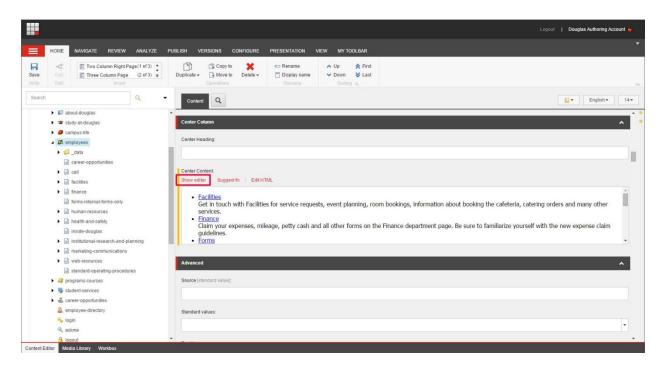
1. Use the Content Tree to navigate to the page you wish to edit, and select it by clicking on the page's name.



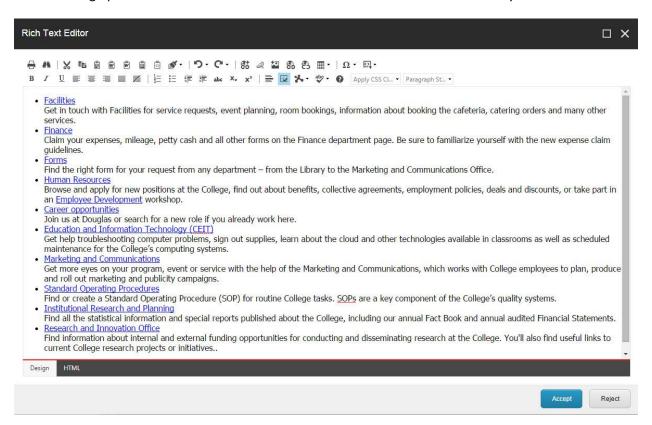
Note that when you select a page (in this example, **Employees**) by clicking on it, the right-hand Content Editing pane will reload.

- 2. In the toolbar, click **Edit** to begin editing the page you've selected. Alternatively, you can click **Lock and Edit** in the yellow highlighted box in the Content Editing pane.
- 3. The Content Editing pane is made up of fields. These fields make up the content of the page. The fields that are available for editing are:
  - a. Page title
  - b. Content heading
  - c. Centre heading
  - d. Centre content

To edit the main content of the page, click on **Show Editor** under the title of Center Column or Right Column.



This will bring up the Rich Text Editor window with the normal Sitecore functionality.



Once you have finished your edits, click on **Accept**. The Editing window will close. (For more explanation on the editing functions available in the Rich Text Editor, please refer to the *Sitecore Web CMS User Guide*.)

- 4. In the toolbar, click **Save** to save your changes.
- 5. Under the Review tab in the Toolbar, click either **Completed (publish to Authoring)** or **Completed (Publish to Production)**.
- 6. After the page reloads, click Immediate Publish (to Production).

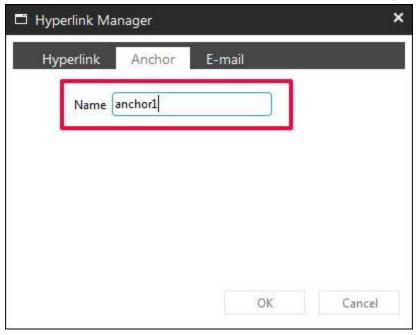
#### 1.3 Anchor links

Just as anchor links will allow you to jump between content on a page, they'll also allow you to jump to a specific spot on a page you're not currently on. This can be useful for longer pages of content, but as a rule try to keep pages of content short, breaking up content onto separate pages as needed. If you need a new page created in your section, contact webmaster@douglascollege.ca.

Anchor links consist of two parts: the anchor and the link itself that links to the anchor. The link points to a specific point on the page to be opened, and the anchor indicates where that specific point is.

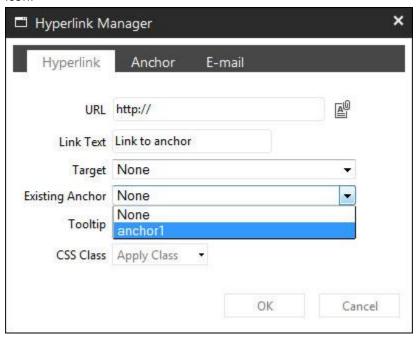
#### 1.3.1 Linking to an Anchor on the same page

- 1. Navigate to the page you wish to edit, and in the toolbar click the **Edit** button. Open the Content Editor by clicking **Show Editor** under the Center Column field.
- 2. To insert an anchor in the location you want to link to go to, put your cursor in that location, and click the **Hyperlink Manager** button in the Toolbar.
- 3. Click on the **Anchor** tab. In the **Name** text box, enter some descriptive text for your anchor.



4. Click OK.

5. Next, select the text that you want to be your link to the anchor. Click on Hyperlink Manager icon.

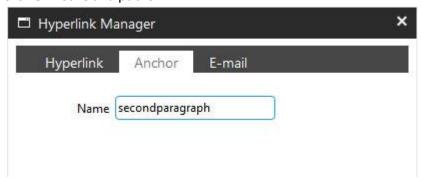


- 6. In the Existing Anchor box, find your anchor and select it. Click **OK**.
- 7. Click **Accept** in the Content Editor to commit your changes.
- 8. In the toolbar, click **Save** to save your changes.
- 9. Under the Review tab in the Toolbar, click either **Completed (publish to Authoring)** or **Completed (Publish to Production)**.
- 10. After the page reloads, click Immediate Publish (to Production).

#### 1.3.2 Linking to an Anchor on another page

Just as anchor links will allow you to jump between content on a page, they'll also allow you to jump to a specific spot on a page you're not currently on.

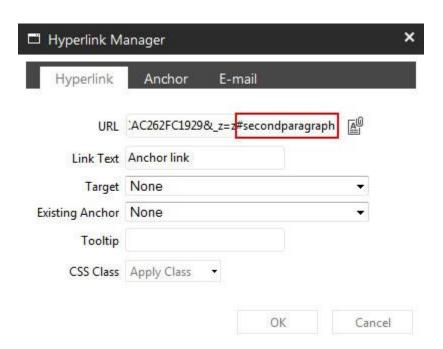
1. Go to the page you want to add the anchor to and insert it using the Hyperlink Manager, this time selecting the **Anchor tab**, and inserting the name in the **Name** field, without the #. Then click **OK**. Save and publish.



**Note:** an anchor link's name must be unique and can't start with a number or contain spaces or other special characters. Using an anchor link name that makes sense is also best practice.

- 2. Navigate to the page that you want the link on. Create a link using the **Insert Sitecore Link** button. Save your changes.
- 3. Highlight the link using your cursor, then use the Hyperlink Manager to edit the link, adding a # and the name of your anchor to the end of the url.

Example: #secondparagraph



- 4. Click Ok.
- 5. In the toolbar, click **Save** to save your changes.
- Under the Review tab in the Toolbar, click either Completed (publish to Authoring) or Completed (Publish to Production).
- 7. After the page reloads, click **Immediate Publish (to Production)**.

# 2.0 Using the Media Library

The Media Library is where Sitecore stores all files that you upload for use on webpages. This includes images, PDF files, documents and spreadsheets.

In Page Editor mode, the Media Library is only accessible when you upload files or images to your page. To manage the Media Library (i.e. add subfolders, delete or replace files), it's easier to do so using the Content Editor.

To access the Media Library, click the Launchpad icon in the upper left of every page:



Click the Media Library button. From this screen you can manage your Media Library items.

#### 2.1 Replacing PDFs and documents without altering the URL (web address)

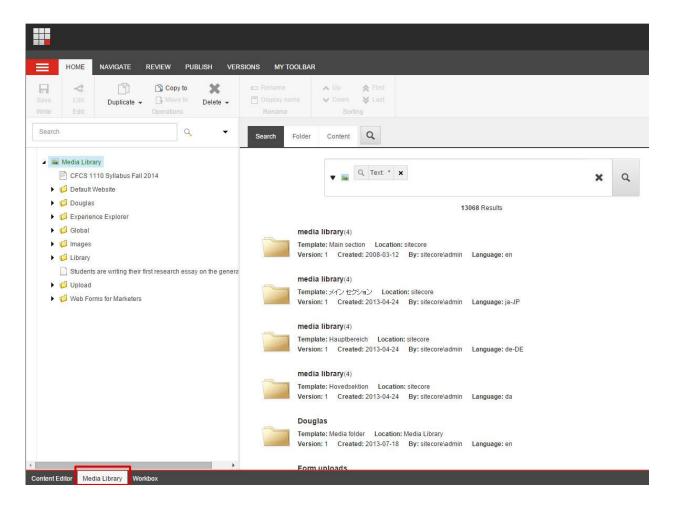
When you add a PDF, Word file or similar to a webpage in Sitecore, the CMS assigns a set of random letters and numbers to the file to use for the files' URL, or web address (i.e. http://douglascollege.ca/<file> or "C106690B3DF7443085BD4397D7E65C7F.ashx".)

When you upload a new version of a file, instead of outright replacing the file, Sitecore creates a new file with the same file name and a **new** set of random letters and numbers – effectively giving it a new URL and creating a new version of the same file.

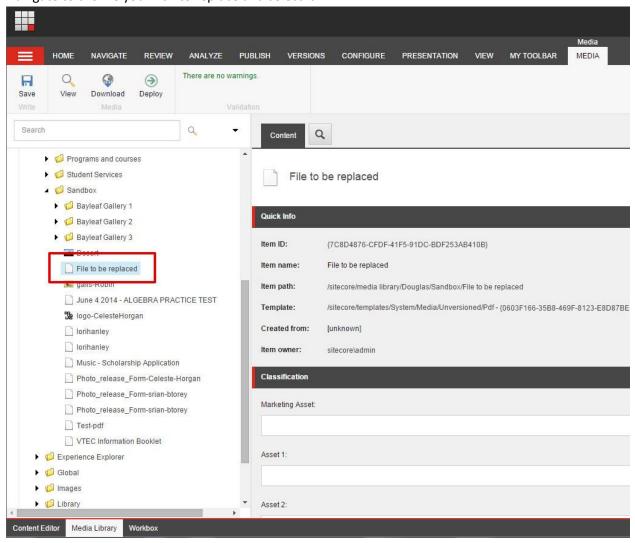
In the event that you want to replace a file **and** preserve its URL and all existing links then use the following steps.

**Note**: In general it's recommended to link users to *pages* that link a file instead of specific files. Use a direct link to a media item only in instances where linking to a page is impossible.

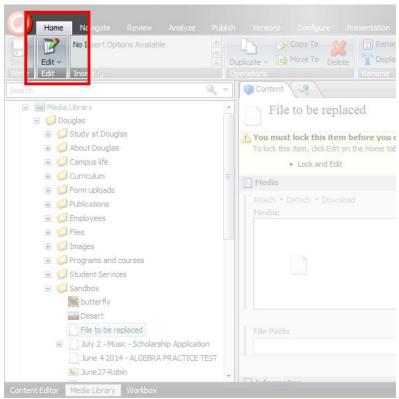
1. Open the Media Library by clicking the **Launchpad** icon in the upper left of every screen, or clicking on the **Media Library** label at the bottom of the screen.



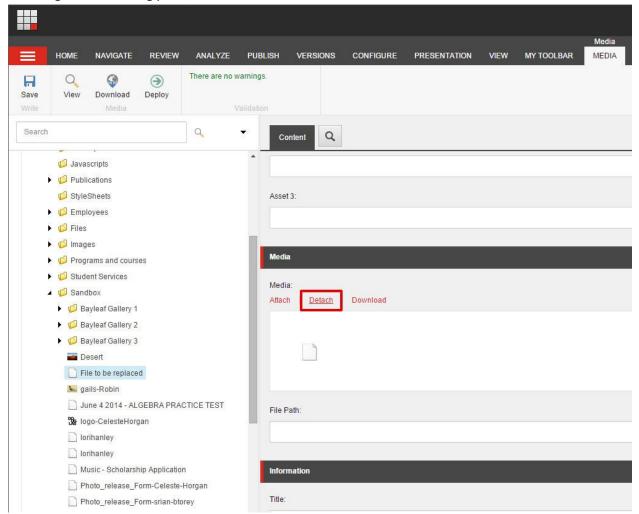
2. Navigate to the file you wish to replace and select it.



3. In the toolbar's **Home** tab, click **Edit**.

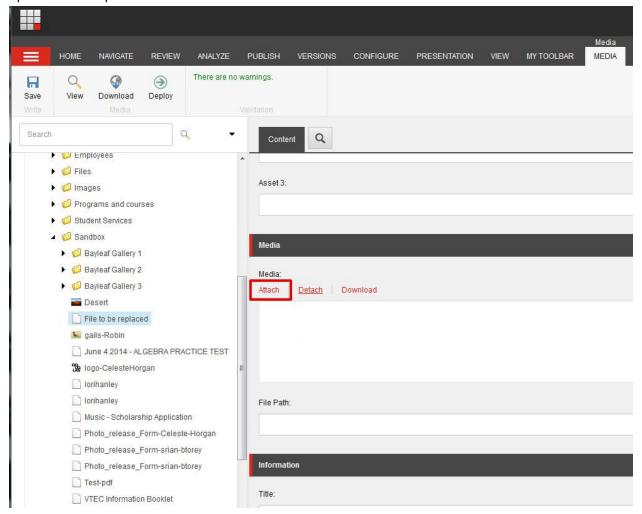


4. In the right-hand editing pane, click **Detach**.



5. When a pop-up asking "Are you sure you want to detach the file?" appears, click **OK**.

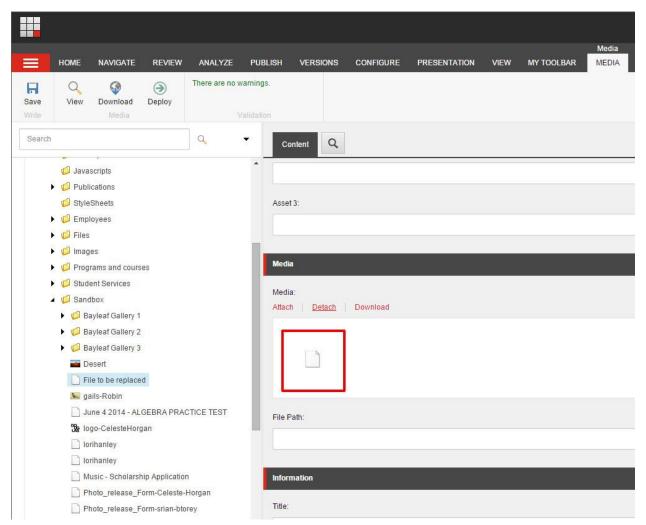
6. The paper (or similar) icon in the box below will disappear. Next, click **Attach** to begin the upload of the replacement.



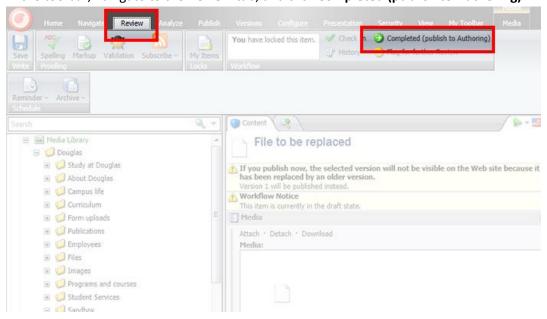
7. Select Browse to browse your computer (or your H:\ drive) to upload a new file.



8. Once you select your file, the upload will begin automatically. When the file upload finishes, the paper (or similar) icon will reappear in the box below, indicating that the replacement media item has been added.



9. In the toolbar, navigate to the Review tab, and click Completed (publish to Authoring).



- 10. When the interface reloads, click Immediate Publish (to Production).
- 11. Clear your Browser's cache.

Because we're replacing a file with an existing Sitecore URL as opposed to uploading a new one, there is a chance our web browser has stored a copy of the file locally, on our hard drives, for quick access. This can interfere with the updates we've just made because we've likely viewed the page in question many times, but shouldn't be a problem for everyday visitors to the site, or for colleagues – typically your browser's cache will be cleared when you shut down your computer automatically, though this behavior depends on your system settings and the browser you're using.

Clearing your browser's cache is slightly different in each web browser. We'll go through clearing Internet Explorer's cache here, but if you're using another web browser, then Google "clear browser cache << web browser name here, i.e. Mozilla Firefox>>".

- a. In Internet Explorer, under Tools in the menu bar, select Delete Browsing History
- b. Ensure that **Temporary Internet Files** is selected (with a checkmark). The other fields aren't as important.
- c. Click **Delete**.
- 12. On the live site, visit the webpage your file is linked on (no need to republish the webpage) and ensure that the replacement has gone through.

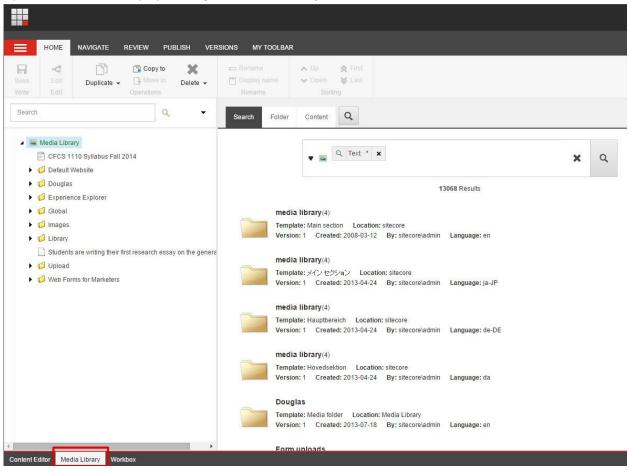
#### 2.2 Deleting items from the Media Library

There will be occasions when you need to delete a media item that is no longer needed. To do so, simply go to the appropriate folder under the Media Library, right-click the item in question and select the **Delete** option from the resulting menu.

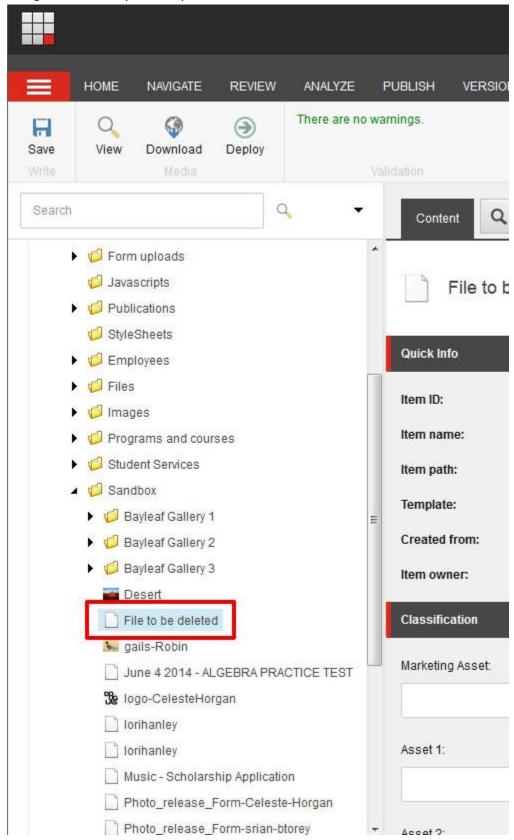
**Note:** You may need to go to the **Review** tab and **Publish** the folder where the item was located in order for the live page listing to be updated.

If you accidentally delete items from the media library, such as files (PDFs, documents, spreadsheets or images), you might be able to restore them using the Recycle Bin.

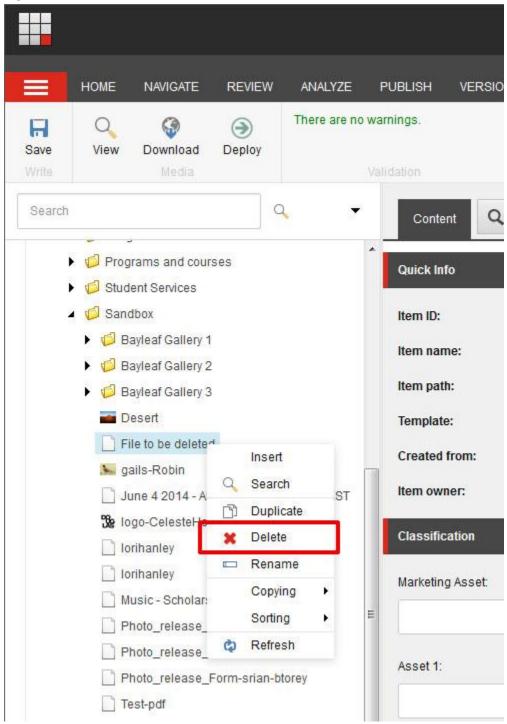
Open the Media Library by clicking the Media Library label at the bottom of the screen.



1. Navigate to the file you wish you delete and select it.



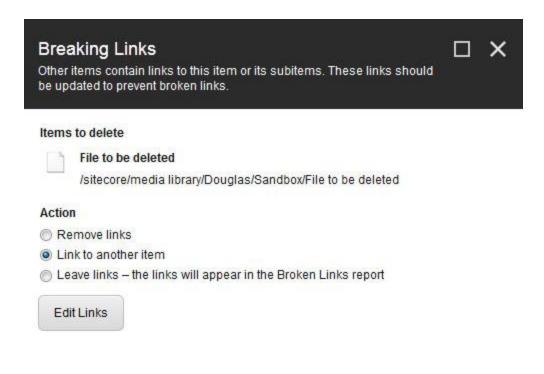
2. Right click the item and select **Delete**.

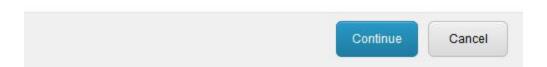


3. When prompted, click **OK** to delete the item.



4. If the item is not in use (i.e. linked or displayed) on any page, the item will be deleted from the Media Library. However, if the file *is* currently being used, you will be presented with the following screen, and the following options:





- a. **Remove Links:** Removes any hyperlinks on **any page of the website** (both pages you have access to and pages you don't) to the file. Linked text will simply become unlinked. If you are not replacing a file with another file that you've uploaded, this is the best option.
- b. **Link to another Item**: Allows you to change all hyperlinks to the item you're deleting to another item or page in Sitecore. If you are replacing a PDF file with a webpage you've created, for example, you could use this option to update links across the site. Similarly, if you were replacing a PDF you've uploaded with a .doc file or similar, use this option

and navigate to the file you'd like to link to.

- c. **Leave Links**: This leaves all links to the file you are deleting in place. When a visitor clicks the links, they will receive a "File Not Found" message. **Do not use this option.**
- 5. When you have selected the appropriate option, click Continue, and perform any other actions (i.e. selecting a new file to link to) as required. When you are done, the file will be deleted from Sitecore.

**Note:** If you delete a file accidentally, you can usually recover it by using the Recycle Bin. See **7.0 Recycle Bin** for more information.

#### 2.3 Organizing and maintaining the Media Library

The Media Library can get cluttered with old files if it's not maintained regularly. One way of avoiding multiple versions of the same PDFs is to follow the instructions in section **2.1 Replacing PDFs and documents without altering the URL**. This will have the benefit of only maintaining a single PDF file while also ensuring that links to the file are always valid.

It's also a good idea to periodically go through your media folder(s) and clean up old files, deleting those that are no longer in use, ensuring they're properly named and Alt tagged, and even adding subfolders to keep files nicely organized. Just remember that any new folders you create need to be saved and published, just like media files and web pages. You can use drag and drop to relocate files or folders, or right-click on them and choose the **Copying > Move to** option. You may then select the location where you want your files to be located.

**Note:** You'll only be able to move files between folders to which you have editing access.

#### 3.0 Right Rail Components

The body (main) content of your page typically occupies about 50% of the width of the website's layout – 25% goes to the menu on the left-hand side, and 25% goes to a column on the right. This right hand column (called the "right rail") can be filled with various types of content, from links or lists, YouTube videos, or navigation as required. The following section will go over the different types of Right Rail (right column) components available to you.

If you wish to add a right rail component to one of your pages, email webmaster@douglascollege.ca.

#### 3.1 Rich Text Component

Inserts a free-form text area into the right rail, in which you can put images, text, and links. Functions essentially like the main content area.

**Uses**: Rich Text Components are good for things like lists of links to files or PDF forms you have attached to your pages, or for highlighting small instances of content that don't necessarily need to be in the main "flow" of the page. The Rich Text Component is good for content you don't need to edit too often, but is

relatively important and might otherwise get lost on the page.



#### 3.2 HTML5 Video Callout

Embeds a video in the right rail that has been uploaded to the Media Library.

**Only for videos which cannot be uploaded to YouTube**. All videos are to be uploaded to YouTube unless otherwise discussed with webmaster at the time of implementation.



#### 3.3 Image Callout

Inserts an image into the sidebar, bounded by a solid gray border. The image itself can be directly linked and captioned.

#### **TEST PAGE**

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla efficitur nunc hendrent purus dignissim, et posuere erat lacinia. Nulla efficitur libero nec lorem rhoncus, interdum fringilla purus vestibulum. Vivamus et quam maximus felis suscipit portitior. Interdum et malesuada fames ac ante ipsum primis in faucibus. Quisque tempus nunc at vulputate viverra. Aliquam sodales nec augue non rutrum. Curabitur finibus sed est sed porta. Praesent pellentesque uma nec diam molestie, non maximus arcu lobortis. Mauris tempus fermentum fermentum. Sed consectetur massa eu commodo fringilla. Morbi eu leo suscipit, blandit metus ut, ullamcorper risus. Donec rutrum, leo sit amet laoreet cursus, odio nibh laoreet massa, eu viverra nisi mauris tincidunt mi.

Suspendisse potenti. Nullam dapibus fringilla dui, sit amet varius nisi semper ut. Phasellus ut posuere neque, nec ultricies erat. Quisque efficitur dolor vel vulputate dictum. Aliquam erat volutpat. Duis pulvinar magna id velit euismod, a cursus quam pretium. Aenean rutrum enim non neque porta, id pellentesque eros fermentum. Sed quis leo nulla. Donec rhoncus, mi eu blandit bibendum, magna nisi conque odio, condimentum ornare leo mi vitae nunc. Etiam gravida nunc dui, nec tincidunt nibh facillisis in. Morbi a dictum ipsum. Mauris bibendum cursus eleifend. Vivamus finibus augue vitae accumsan dapibus.

Integer elementum risus ac turpis scelerisque gravida. Nulla suscipit libero vel urna ultricies efficitur. Integer vitae elit id arcu vestibulum sagittis. Cras vel massa justo.



#### 3.4 Rail Navigation

Inserts navigation into the sidebar.

Navigation element is inserted on pages as required. Rail Navigation will be added by webmaster to any page that requires it (i.e. pages which are four levels deep or lower in the site hierarchy).

If you think Rail Navigation may be missing from a page which requires it, please email webmaster@douglascollege.ca.



#### 3.5 YouTube Video Callout

Embeds a YouTube video into the sidebar. Videos open in a full-sized "lightbox" player which overlays the screen and is closable at any time.

This is the preferred way for embedding YouTube videos into content.

# ies Douglas.

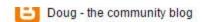
a high value on the Hudson's Bay became his life-long

ics, becoming the the province's



#### 3.6 Last Updated Date

Displays, in the sidebar, when the page was last published. Useful for pages with time-sensitive information.



ero vel urna nassa justo. t purus cursus

Last Updated: 13/11/2014 2:10:47 PM

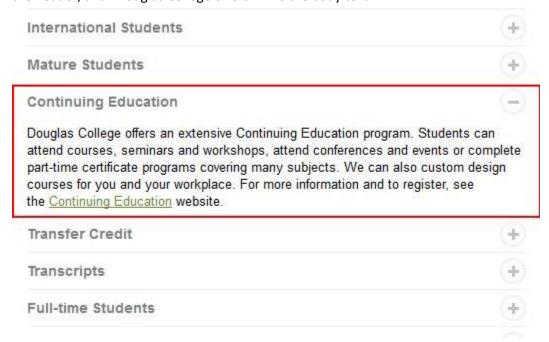
#### 4.0 Using Accordion Controls

Accordion controls can be inserted into pages and provide an open/close functionality that is useful for some content such as FAQs.

These accordion controls allow users to click to show or hide content. Accordion controls are useful for pages with lots of small sections of content. If you wish to add an Accordion control to one of your pages, email <a href="mailto:webmaster@douglascollege.ca">webmaster@douglascollege.ca</a>.

#### 4.1 Setting up and managing Accordion Controls

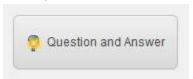
Contact webmaster@douglascollege.ca to request an accordion control. Pages are populated based on items in an associated "\_data" folder, which will be created for you when the accordion is requested. The folder is populated with Question items – nodes of content that contain a question (header) and an answer (body text). In this example, Continuing Education is the header, and "Douglas College offers....." is the body text.



2. We will also create a folder called \_data for you, and a subfolder within \_data called FAQs or Frequently Asked Questions.



3. Click on the FAQs folder which will be located below your FAQ web page. You will see an icon that says Question and Answer. Click on this icon to create a new question and answer (FAQ).



- 4. Each question must be named and names cannot include punctuation or other non-alphanumeric characters (hyphens are allowed). For example, use *Im calling on behalf of my sondaughter...* as opposed to *I'm calling on behalf of my son/daughter...*
- 5. Enter the question title as it should be seen on the page, for example, "I'm calling on behalf of my son/daughter, can you tell me about his/her application?"
- 6. The answer field is a regular HTML section so you will need to select Show Editor and enter your text in the Rich Text Editor, just as you would for a regular HTML page. Note that answers may contain tables, bold and italic text, etc.
- 7. When finished, click the **Accept** button.
- 8. In the toolbar, click **Save** to save your changes.
- 9. Under the Review tab in the Toolbar, click either **Completed (publish to Authoring)** or **Completed (Publish to Production)**.
- 10. After the page reloads, click Immediate Publish (to Production).
- 11. Select the Review tab and publish the FAQ.

**Note:** When creating a new question, sometimes Sitecore won't place items in the order in which they were created. If this happens, simply drag and drop the question to its correct location.

#### **4.2 Editing Accordion Controls**

Once a question and answer has been created, editing an accordion control is a simple matter.

- 1. Select the accordion you'd like to edit.
- 2. Click on **Lock and Edit** at the top of the page.
- 3. Follow steps in section 4.1 Setting up and managing Accordion Controls above.

# 5.0 Auto-populating pages using Media Directory Listings

Sitecore allows you to create pages with dynamically updated content, based on media folder content/listings. These are called Media Directory Listings. For example, the Policies page located at <a href="http://www.douglascollege.ca/about-douglas/governance/policies/administration">http://www.douglascollege.ca/about-douglas/governance/policies/administration</a>. Pages like these are useful for places where you have lots of files, such as the College Policies. In general you should avoid having too many PDFs, as content is more easily searchable when it's a webpage. Contact <a href="https://www.douglascollege.ca">webmaster@douglascollege.ca</a> if you are interested in this functionality.

#### 5.1 Setting up and managing auto-populated pages

Contact <u>webmaster@douglascollege.ca</u> to request an auto-populating page. Pages are
populated based on the folder structure of a specified Media Library folder. Pages display all the
subfolders as subheadings. In this example, **Administration** is the folder specified, and **A.01**General is a subfolder of that in the Media Library, containing the two files it lists below.

# ADMINISTRATION

Policies that are not linked are currently under review and will be available upon completion.

#### A01. General

A01.01.01 Douglas College Policies: Framework (pdf)

A01.01.02 Death of a Student (pdf)

#### A02. Personnel

A02.01.01 Conflict of Interest (pdf)

A02.01.02 Respectful and Inclusive Environment (pdf)

A02.01.03 Douglas College Protected Disclosure Whistleblower Policy (pdf)

A02.05.01 Compliance with the Freedom of Information and Protection of Privacy Act (pdf)

A02.05.02 Anti-Spam Policy (pdf)

A02.06.03 Health & Safety (pdf)

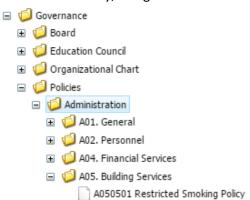
A02.06.04 Closure of College (pdf)

A02.07.01 Retirement Policy and Service Recognition (pdf)

#### 5.2 Managing files for auto-populated pages

Files you upload for auto-populated pages need to have a specified Display Title, as well as a specific order. Reordering items in Sitecore is covered in **Section 6.0 Sorting Pages and Files**. Setting the Display title for an item in the media library is covered below.

1. In the Media Library, navigate to the folder you wish.



- 2. Upload your PDF file to the folder as you would any other media item.
- 3. It's essential that you add a title in the PDF's **Title**: field under the Information section. This is what will display on the page when viewed, as in the example image under item 1.



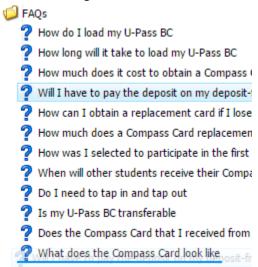
- 4. In the toolbar, click **Save** to save your changes to the file.
- 5. Under the Review tab in the Toolbar, click either **Completed (publish to Authoring)** or **Completed (Publish to Production)**.
- 6. After the page reloads, click **Immediate Publish (to Production)**.
- 7. Refresh your live page to ensure everything is being listed as expected.

#### 6.0 Sorting pages and files

As touched upon in section **1.6 Adding FAQs**, sometimes you will need to re-order items such as pages, FAQs and PDFs. The order they appear in Sitecore's interface is the order these items will appear on your website.

Note: Every time you move an item, you must Publish the item again so the changes will take effect.

1. Drag-and-drop to select an item and move it up and down above or below other items. You'll see a blue line appear when you're able to let go of the dragged item, at which point Sitecore will ask you whether or not you want to move the item. Selecting **OK** will relocate the item, while selecting **Cancel** will leave it in its current position.



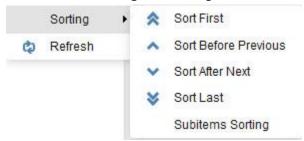
- 2. In the toolbar, click **Save** to save your changes.
- 3. Under the Review tab in the Toolbar, click either Completed (publish to Authoring) or Completed (Publish to Production).
- 4. After the page reloads, click **Immediate Publish (to Production)**.

#### 6.1 Using the Sorting Menu to reorder multiple items at once

You can also sort items using the **Sorting** menu options. This allows you to sort multiple items at the same time, or to sort items based on a criteria provided to you, such as alphabetical sorting.

- 1. Navigate to the item you wish to sort in the Content Tree. If you want to re-order an entire section say, <a href="http://www.douglascollege.ca/sandbox/">http://www.douglascollege.ca/sandbox/</a> and all of its child pages, click the parent page (/sandbox/) not one of the children.
- 2. Right-click the item.

3. Click the word **Sorting** from the right-click menu that appears.



- 4. Choose Sort First, Sort Before Previous, Sort After Next or Sort Last if you re sorting one item.
- 5. Chose **Subitems Sorting** if you wish to sort the child pages below the one you selected. Then, choose one of the following options from the **Sorting** drop-down, and click **OK.**:
  - a. **Created** sorts pages by the date they were created in Sitecore.
  - b. **Default** uses Sitecore's default sorting method, alphabetical. Symbols (\_, 0-9, etc.) are appear before pages starting with 'a'.
  - c. **Display Name** sorts items by their Sitecore Display Name. Typically (but not always) this is the same as the page title.
  - d. **Logical** sorts items alphabetically, with symbols (\_, 0-9) appearing below pages starting with a to z.
  - e. **Reverse** sorts items in reverse alphabetical order. Symbols appear above pages starting with 'z'.
  - f. **Updated** sorts pages by their last updated date.
  - g. [Reset to Standard Value] resets sort order to what its default/current state.
- 6. In the toolbar, click **Save** to save your changes to the file.
- 7. Under the Review tab in the Toolbar, click either **Completed (publish to Authoring)** or **Completed (Publish to Production)**.
- 8. After the page reloads, click **Immediate Publish (to Production)**.
- 9. Refresh your live page to ensure everything is being listed as expected.

**Note:** Using the **Sub items Sorting** option will override drag-and-drop sorting and use the sorting method you selected instead.

# 7.0 Recycle Bin

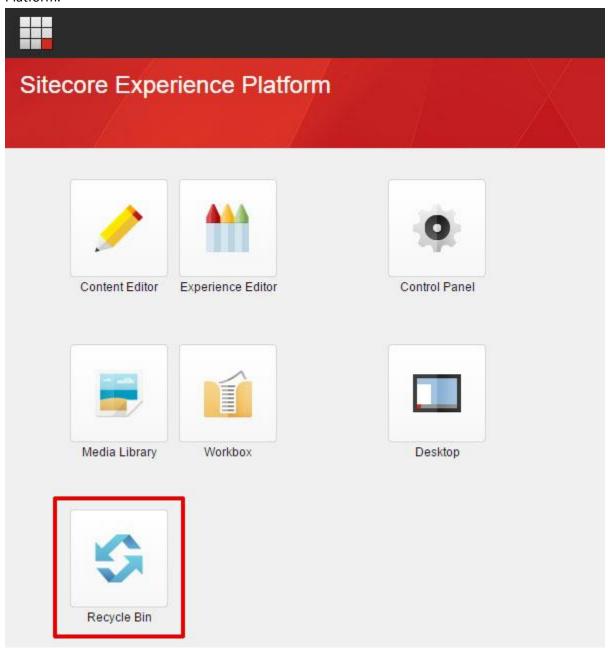
The Recycle Bin is used to hold deleted items, such as images, pages and files. If you delete a file, either by accident or otherwise, you can use the Recycle Bin to get it back.

#### 7.1 Restore deleted items

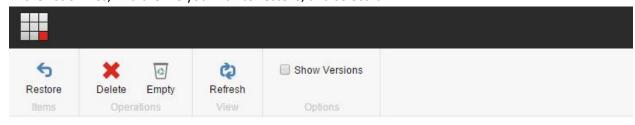
1. Click the Launchpad icon in the upper left of the screen. This will return you to the Sitecore Experience Platform screen.



2. Navigate to the Recycle Bin by clicking on the Recycle Bin button in the Sitecore Experience Platform.



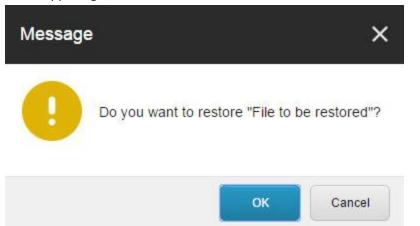
3. In the list of files, find the file you wish to restore, and select it.



Drag a column to this area to group by it.



4. In the upper right, click the Restore button. You will be asked to confirm the action:



5. Click OK. Your file will be restored to its original location and will be ready to use.