**Sitecore testing – Manual updates needed:**

|  | Item | Update Needed | Responsible |
| --- | --- | --- | --- |
| A. | Security warning pop ups – should be during training only – put into the manual (appendix item) how users can stop this for the training if it bothers them | 1. Click on “continue to this website” 2. Click the “Certificate error” (red) at top 3. Click “view certificates” 4. Click “Install certificate” 5. In the certificate import wizard pop up – click “Next” 6. Select “place all certificates in the following store” 7. Click the browse button 8. Select “trusted root certificate authorities” – OK 9. Click “Next” 10. Click “Finish” 11. Close and Restart your browser   \*NOTE: Note: there is text and images in the attached document (sitecore5 training manual appendix) | Janet/Christina |
| B. | Training manual and topics need to be tested in a *MAC environment and safari browser* | 1. Mac computer | Christina |
| C. | We went through the manual and tested the following items (in IE and Chrome – PC machines only). It seems a few things are very browser specific and perhaps we should put a comment about that at the beginning of the manual. | 1. Logging in to PE (page editor)    1. Issues with security pop ups in IE only | Peter/Kal |
| 1. Editing a page in PE |  |
| 1. My items – locking and unlocking \*this must be added to the manual | Janet/Christina |
| 1. NO SUBMIT button available – once it is we have to add this step/information to the manual \*as per Peter’s recent email – we will have to put into the manual that they must go to the workbox to submit their edits (after they unlock) | Peter  Janet/Christina |
| 1. Chrome – rich text editor scrolling issue | Peter |
| 1. Pasting text – chrome pop up but IE NO pop up – will have to fix this in the manual since it seems different for the browsers | Janet/Christina |
| 1. Add pic/logo of google chrome to manual for the “choosing a web browser” part | Christina |
| 1. In IE the edit button on the navigation bar (pg. 2) seemed to come and go – therefore take it out of the manual – remove the arrow on the screen capture as it is confusing and caused more confusion when we used it with preview | Christina |
| 1. Editing a page in PE (pg. 3) – we must put in information about unlocking and my items after the bit about saving. Once the user saves their edit, if they are done, they need to go to “my items” and unlock the item (and then go to the workbox to submit). This needs to be explained here as part of this first step of editing. | Christina |
| 1. Unlock and submit through workbox – throughout the manual we should look to putting in a one liner about: remember after you press save you need to unlock the page and then proceed to the workbox to submit your edits before logging off. i.e. at the end of the sentence on pg 4 after the part about pasting from word. | Christina/Janet |
|  | 1. Internal Links: we need to add after the internal link explanation (after …”Click save to save your changes”)… information about how they can view the link to make sure it works by going to the experience tab on the ribbon and clicking the Preview button. Here they will be taken to the linked internal page and will have to navigate back to where they were. By pressing preview they are taken out of edit mode so they have to press edit again to get out of preview mode and then they can use the navigation bar to click on their pages (sub pages) and then press the GO button to get back to where they were. Do not click the edit button – too confusing. No edit button in IE anyway. Will need a screen capture of this. | Christina |
| 1. External links: change “document icon” to “edit the text” – 2 instances 2. External Links: add a picture of the hyperlink manager button – link button with globe on it (I think I made one for the pptx that you can copy and paste) 3. External Links: …”in the image below, we are creating a hyperlink”… change that to …”we are creating an external link” 4. External Links: change the screen capture (pg. 7) to one that shows the target as “new window” | Christina |
| 1. Email Links: remove the first paragraph and simply just say to open up the hyperlink manager and out in the information…then press ok etc. The part about mail to: is confusing since it puts it in behind the scenes and the user does not have to type it. Also we can say a sentence about putting something in the subject box as well if they wish. | Christina |
| 1. Uploading images to media library: we found this part very confusing. All we need to say here is very simply upload and insert all at once – go to your page – click where you want to insert the picture – then talk about uploading to media library as this must be done first – so show them how to upload and then directly after that show how to insert the picture. Felt that this was the most common thing they would do – go to the page – click their cursor – then have to upload to ML and then insert the pic all in one step. Also this seemed to have some pop up blocker/browser issues. So keep this simple – have to upload to ML first (this is how) then insert. Then press lock and edit and put in the ALT and then talk about changing W and H. We can discuss this over the phone.   Also delete pic of jeff about scale size(pg. 10) | Christina/Janet |
| 1. Scaling images by dragging: chrome cannot drag to resize in RTE or PE. Seems browser specific. So might have to mention this or keep it simple. | Christina |
| 1. Alternate text: remove this section – not needed as we previously told them to insert the ALT as soon as we insert the pic. | Christina |
| 1. Changing/replacing images in PE: remove this whole section. Works differently for browsers and users will simply be able to delete the one photo and insert the new one the way we just told them to above. | Christina |
| 1. Saving, submitting and publishing changes: highlight or make stand out the fact that the user must make sure they have unlocked all their pages now that they are done editing and are ready to submit. 2. Saving, submitting and publishing changes: remove the line “Your changes will not be visible right away”….change to: “your changes do not show on the public website right away.” 3. Saving, submitting and publishing changes: Make sure it is very clear about submitting here as this is the only way now to submit their edits 4. Saving, submitting and publishing changes: Remove the screen capture and info about accessing the workbox from content editor view 5. Saving, submitting and publishing changes: remove the sentence (pg. 16) …”sitecore publishes items ready for publishing at 12pm and 5pm every day” | Christina |
| 1. Versions: remove this whole section from the manual – mainly for administrators and not needed for basic user (just confusing) | Christina |
|  |  | 1. Appendix: make an appendix section at the end of the saving, submitting publishing section which will include: The content editor view, creating a page, changing your password, editing images, and the addition of the security warning. | Christina |
| 1. Advanced tips: remove the part about closing and reopening the page editor for faster browsing AND quickly accessing the content editor | Christina |
| 1. Creating a page: we did not test this as Kal and Peter were going to look into it a bit - also we felt it was not a basic user feature. Will revisit. |  |
|  | Other | 1. Headings drop down list – Peter and kal to look into removing all the other heading styles besides p, normal, 3, 4 | Peter/Kal |
|  |  | 1. Workbox – peter and kal to look into changing the size of the scroll box | Peter/Kal |
|  |  | 1. Make sure the PPTX stack reflects the above changes/additions | Janet/Christina |

\*note – the page references refer to the printed (from Chrome) copy of the current online manual.