**Sitecore Training Exercises**

Content Author

Family Zoo Website

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# MODULE 1: Experience Editor Overview

## Classroom Exercise 1

### Activate the Navigation Bar

1. Log in to Sitecore.
2. Select the down arrow  icon on the far-right corner of the Ribbon to expand the tab.
3. Select the **View** tab in the Ribbon.
4. Select the **Navigation Bar** checkbox.



The Navigation Bar will now display the next time you log into Sitecore.

# MODULE 2: Create a Page

## Classroom Exercise 2

### Create a Page

1. **Navigate to the Family Zoo > Group 1** folder from the Navigation Bar.
	1. Select the carrot  icon after the **Family Zoo** title to display the drop-down of folders.
2. Select the **Go** button once it’s active.



1. Select the **Edit**  icon in the Experience Editor Ribbon to activate the ribbon functions.
2. Select the **Insert Page**  icon.
3. Select the **DSF Legacy** template.
4. In the Name field, enter your full name.
	1. Example: Jane Doe Page
	2. **NOTE: Special characters are NOT allowed**
5. The Page will open in **Edit** mode, already **Checked Out** and locked.



# MODULE 3: Edit a Page

## Classroom Exercise 3

### Edit Page Properties

#### Show and Change the Page Title

1. Select the **Toggle Show Page Title** link
2. Select the **edit**  icon.
3. Select the **Show Content Title** checkbox.
4. Select **OK**.
5. Select the **Title** text to display the toolbox.
6. Make your change to the title.
7. Select the **Save**  icon.

#### Edit Meta Data Title

1. Select the **Add/Edit Meta Data** link.
2. Select the **edit**  icon.
3. Update the Meta Title text.
4. Select **OK**.
5. Select the **Save**  icon.

#### Edit Page File Name

1. Select the **Rename ** icon in the ribbon from the Home tab.
2. Edit the file name.
3. Select **OK**.
4. Select the **Save**  icon.

#### Add a Teaser

1. Select the **Add/Edit the Teaser** link.
2. Select the edit  icon.
3. Enter a description of the page you have created that will display under the title in your website.
	1. Example: Summer 2019 Train Ride Schedule of Events.
4. Select **OK**.
5. Select the **Save**  icon.

## Classroom Exercise 4

### Enter in Content

#### In-Page Editing

1. On the page, select the **[No text in field]** text to display the toolbox.
2. Enter in some content.

#### Rich Text Editor

1. Select the **Editor**  icon to launch the Rich Text Editor.
2. Enter a sub-title. Example: 2019 Train Rides and Schedule
	1. Add a **Heading 4** to the sub-title.
		1. Highlight the text you want made into a header.
		2. Select the Header drop down andchoose the **Heading 4** option.
	2. Create a **bulleted list** of items.
		1. Place the cursor where you want the bulleted list to start.
		2. Select the **bullet list**  icon.
		3. Enter in these two section titles.
			1. Train Rides
			2. Schedule
	3. Further down the page, enter the two section titles again, hitting the “enter” key 4-5 times in-between.
		1. Highlight **Train Rides** and selectthe **Heading 5** option in the heading dropdown.
		2. Repeat step on each section title.

#### Create Anchor Links

1. Place your cursor in-front of **Train Rides** (do NOT highlight the text **Train Rides**).
2. Select the **Hyperlink Manager **icon.
3. Select the **Anchor** tab.
4. Enter a **name** for the anchor.
5. Example: rides
6. Select **OK**.
7. You will not see the anchor you just created next to the section title on the page.
8. Repeat steps 1 - 5 again for each section title, but name the anchor the same as the section title name.
9. Highlight the bullet at the top of the page named **Schedule**.
10. Select the **Hyperlink Manager **icon.
11. Under the **Existing Anchor** field**,** select **rides** (the anchor name you just created) from the drop-down options.
12. Select **OK**.
13. Repeat step 7 – 10 again for each **bullet**, but select the relevant anchor name from the dropdown.
14. Select the **Accept** button to exit out of the Rich Text Editor.
15. Select the **Save**  icon.

#### Create Internal Links

1. Under the Train Rides sub-title, type in “This is an internal Sitecore link”.
2. Highlight a couple words in the paragraph to hyperlink to the **Family Zoo homepage**.
3. Select the **Sitecore Link **icon.
4. Select the arrows to expand the **Portal > Training-Sites > Family Zoo** folders.
5. Select the **Family Zoo** title. (This is the homepage)
6. Select **Insert**.
7. Select the **Save**  icon.

#### Link to a Document File

1. After the internal link text, type in “This is a link to a document file”.
2. Highlight a word to link to a document file.
3. Select the **Sitecore Link **icon.
4. Select the **Media Items** tab.
5. Select **Family Zoo > Documents** folder.
6. Choose any one of the document files (pdf, word, excel) listed in that folder.
7. Select **OK**.
8. Select the **Save**  icon.

#### Create External Links

1. After the document file text, type in “This is a link to an external site”.
2. Highlight the text you want to hyperlink.
3. Select the **Hyperlink Manager ** icon.
4. Enter a web address in the URL field.
	1. Example: <http://www.google.com>
5. Select **New Window** in the Target drop down field.
6. Select **OK**.

#### Create an Email Link

1. After the external link text, type in “This is a link to an email address”.
2. Highlight the text you want to hyperlink.
3. Select the **Hyperlink Manager **icon.
4. Select the **e-Mail** tab.
5. Enter an **email address** in the Address field.
	1. Example: contact@email.com
6. Select **OK**.

#### Create a Phone Link

1. After the external link text, type in “This is a link to phone number 555-555-5555”.
2. Highlight the phone number to hyperlink.
3. Select the **Hyperlink Manager **icon.
4. Enter **tel:** and the phone number in the hyperlink field.
	1. Example: tel:5555555555
5. Select **OK**.
6. Click the **Accept** button at the bottom of the Rich Text Editor screen.
7. Select the **Save**  icon.

#### Insert an Image

1. Place cursor where you want to insert an image.
2. Select the **Image** icon.
3. Navigate to **Family Zoo** > **Images** folder (if not there already).
4. Select an image from the options shown.
5. Enter in an **Alt Text** (if not there already).
6. Select **Insert**.
7. Select the **Accept** button at the bottom of the Rich Text Editor screen.
8. Select the **Save**  icon.

#### Insert a table

1. Place your cursor after the last title.
2. Select the **Editor**  icon to launch the Rich Text Editor.
3. Select the **Table Wizard** from the Tableicon.
4. Set 4 columns and 3 rows in the **Table Design** tab.

5. Next to **Width**, type “**100**”.
6. Using the dropdown, change “**px**” to “**%**”



1. Select the **Accessibility** tab.
2. Set **1** row and **1** columns.
3. Enter a **Table Caption**.
	1. Example: Table Caption Here
	2. Select the **Caption Align** option to change the position of the title. It aligns center by default.
4. Check the **“Associate cells with headers”** box.

5. Select **OK**.
6. Select the first cell on the top, left and begin entering the content as shown below.
	1. Select the Tab key to jump to the next cell.
	2. As you enter content, the table will increase in width.



1. Select the **Accept** button.
2. Select the **Save**  icon.

The finished table should look like this.



# MODULE 4: Lock (Check Out) and Unlock (Check In) Pages

## Classroom Exercise 5

### Lock (Check Out) Individual Pages

To edit a page, it must be locked (checked out).

**NOTICE:** No one else can edit a locked page besides the Content Author who locked the page. The page can be unlocked by the Content Author who locked it or a System Administrator.

1. Navigate to the page you wish to Lock (Check Out).
2. If the page is not already in Edit mode, select the **Edit** icon from the Experience Editor Ribbon on the Home tab. The page will refresh with a yellow message bar below the ribbon.

3. Select the **More** link in the yellow message bar.

 

1. Select the **Lock and Edit** link in the yellow message bar. The page will refresh and the message bar will disappear.



OR

Select the **Lock**  icon from the Experience Editor Ribbon on the Home tab,


The page is now **Locked** and ready to be edited.

## Classroom Exercise 6

### Unlock (Check in) Individual Pages

1. Select the page you wish to unlock.
2. Select the **Unlock**  icon from the Experience Editor ribbon on the Home tab. The page will refresh with the yellow message bar again.



## Classroom Exercise 7

### Unlock (Check in) Multiple Pages

1. Select the **My Items**  icon from the Experience Editor Ribbon on the Home tab.

2. The **My Items** dialog box will appear.

3. Select the pages you wish to **Unlock**. Selected pages will have a blue highlighted background.
4. Select the **Unlock** button to Unlock only those pages selected.
5. Select the **Unlock All** button to unlock all pages listed.
6. Select the **Close** button or the **X** at the top right of the dialog box to exit.

**TIP:** If the dialog box continues to show pages in the list after you have selected them to be unlocked, select the Close button, then reopen the My Items dialog box. There should be no pages listed now.

# MODULE 5: Submit a Page for Approval

## Classroom Exercise 8

### Submit Page for Approval

1. Select the **Unlock**  icon in the ribbon on the Home tab.
2. Select **Submit** in the blue message bar for approval.

3. The **Comment** dialog box wil appear.



Add a comment noting changes made to the page.

**OR**

1. To submit multiple pages, select the **Workbox** icon in the ribbon on the **Home** tab.

2. The **Workbox** dialog box will appear.

3. Select the pages you wish to **Submit** by checking the box.
4. Select the **Submit (selected)** button.
	1. Select the **Submit (all)** button to submit all pages.

Note: When submitting multiple pages for approval using the **Workbox**, there is no option to add a comment.

Once submitted, the Content Approver will receive an email notification of the content change(s) with your comment.

**TIP:** If the dialog box continues to show pages in the list after you have selected them to be submitted, select the Close button, then reopen the Workbox dialog box. There should be no pages listed now.

# MODULE 6: Upload Images and Document Files

## Classroom Exercise 9

### Upload an Image

1. Right-click the **Platform**  icon in the upper left part of your screen to prompt a dropdown.
	1. Select **Open Link in a New Tab**.
	2. The **Sitecore Experience Platform** screen will display.
2. Select the **Media Library**  icon.
3. Select the **Family Zoo** folder from the Content tree in the left pane.
	1. **Media Library** > **Family Zoo > Images**
4. Select the **Images** folder.
5. Select the **Upload file (advanced)** button in the right pane.

6. Select the **image file** on your computer desktop.
7. Ensure the following checkboxes **are selected**:
	1. “Make uploaded media items versionable”
	2. “Overwrite existing media items”
8. Select **Upload**.

#### Add an Alt Text to the Image

1. Select the **image file** from the right pane to open its properties.
2. Select the **Lock and Edit** link from the yellow message bar.
3. Scroll down to the **Image** section and view the **Alternate Text** field.
4. Enter a description that describes the image.
	1. Example: “Image 1”.
5. Select the **Save**  icon.
6. Select the **Edit**  icon to prompt a dropdown.
7. Select the  **Check In** option.

## Classroom Exercise 10

### Upload a Document File

1. Select the **Family Zoo** folder from the Content tree in the left pane.
	1. **Media Library** > **Family Zoo > Documents**
2. Select the **Documents** folder.
3. Select the **Upload file (advanced)** button in the right pane.

4. Select a **document file** on your computer desktop.
	1. The page will refresh with the file displaying.
5. Ensure the following checkboxes **are selected**:
	1. “Make uploaded media items versionable”
	2. “Overwrite existing media items”
6. Select **Upload**.

#### Modify the Document File name

1. Select the **document file** from the right pane to open its properties.
2. Select the **Lock and Edit** link from the yellow message bar.
3. Select the **Display name** from the ribbon on the **Home** tab.
4. A dialog box appears with the original the file name
5. Modify the file name.
6. Select OK.
7. Select the **Save**  icon.
8. Select the **Edit**  icon to prompt a dropdown.
9. Select the  **Check In** option.

#### Add a Content Title and Teaser

1. Select the **document file** from the right pane to open its properties.
2. Select the **Lock and Edit** link from the yellow message bar.
3. Scroll down to the **Base Data** section and view the **Content Title** field.
4. Enter a new name for the document file.
	1. This new name will display in the website search results
5. Enter a Teaser (a brief description) that describes the document.
	1. This teaser will display in the website search results
6. Select the **Save**  icon.
7. Select the **Edit**  icon to prompt a dropdown.
8. Select the  **Check In** option.

# MODULE 7: Over-write a Media Library item

## Classroom Exercise 11

### Over-write a Document File

1. Navigate to the original document file you wish to overwrite with the new document file.
2. Select the document file to view its properties.
3. Select the **Lock and Edit** link from the yellow message bar (if applicable).
4. Scroll down to the **Media** section and select the **Detach** link.

5. A pop up window will appear, select **OK**.

6. Now, select the **Attach** link.
7. A pop up window will appear, select the **Choose File** button to browse for the new document file.

8. Select the **Attach** button.
9. Select the **Save**  icon.
10. Select the **Edit**  icon to prompt a dropdown.
11. Select the  **Check In** option.