



BCI.com

Sitecore Publishing Guide

November 2017

Table of contents

3	Introduction	63	Search
4	Sitecore terms	66	Change your personal settings
5	Publishing basics	69	BCI.com Publishing Guidelines
5	Log in to Sitecore Editing	69	All pages: External links
6	Navigating the user interface	70	All pages: Images
10	Create an item in the Content Editor	70	All pages: Naming convention
12	Edit the website content	71	Navigation bar and Footer
15	Lock and unlock an item	71	Beyondsoft logo
18	Delete an item	73	Home Page
21	Create an anchor and link to it	75	Solutions
23	Copy or duplicate an item	75	Industries
25	Preview a webpage	75	Company
26	Publish and unpublish an item	76	Insights
34	Work in workflows	76	Events
37	Move an item	81	Case studies
38	Insert an image	87	Data Sheets and White Papers
42	Upload a file to the Media Library	93	News
47	Edit a media item	100	Blogs
53	Carousels	107	Careers
56	Modals	108	Contact
57	Archive and restore an item	111	Fact Sheet
61	Restore or remove a deleted item		

Introduction

For this Sitecore instance, multi-tiered security roles for individual users to prevent publishing are not needed, as this Sitecore “organization” is small. If in the future, a larger number of people are publishing content to the Beyondsoft.com website, additional roles can be set up to limit/promote an individual’s ability to publish or edit items.

The “Simple workflow” will be implemented to regulate the publishing of items. This should cut down on the overall number of use cases needed when testing this Sitecore implementation.

Two roles have been established at the outset: admins and authors. The author role of a Beyondsoft Sitecore user will be referred to as a Content Publisher. This role will not be able to change design elements such as templates, renderings, components, or Standard Values. This role will be limited to content manipulation/publishing only.

In the BCI.com Publishing Guidelines section of this guide, best practices and other custom rules – specific to BCI.com – are discussed and explained. These instructions can be adapted as the site grows, but the basic style and formatting rules should be kept as close to the original information as possible.

Sitecore terms

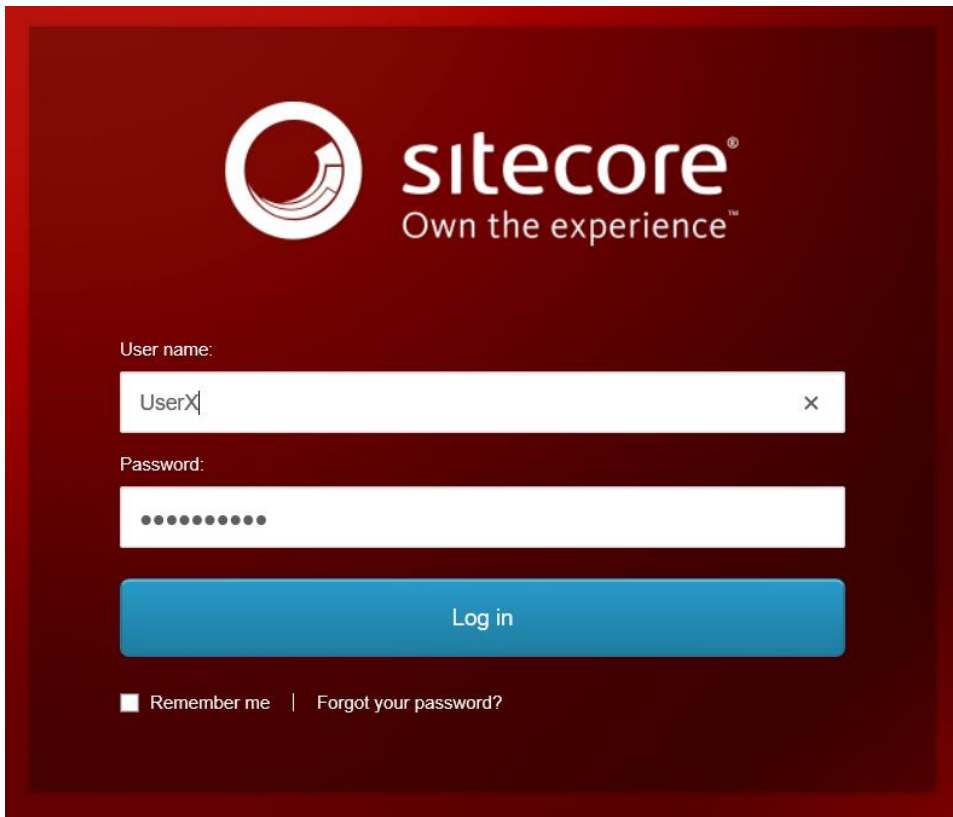
- **Content Publisher:** Responsible for manipulating, publishing, and reviewing content.
- **Content Editor:** An editing tool that you can use to manage and edit all the content on the website.
- **Items:** Items are the basic building blocks of the Sitecore website. An item can represent any kind of information that makes up a webpage. For example: a piece of text, a media file, a layout etc. An item always has a name – an ID that uniquely identifies the item – and it is based on a template that defines which fields the item contains. In addition, an item can have multiple versions and multiple language versions.
- **Media items:** A media item is composed of several fields and it always has a file attached to the Media field. A media item can be an image, a document, a video, or an audio file. In Sitecore, there is a difference between media files and media items. An image or video file that is stored on a local computer is called a media file. When a media file is uploaded to the Sitecore Media Library, the file is attached to a media item and is from then on referred to as a media item.
- **Media Library:** All media items can be managed from the Media Library, such as images that can be embedded in a webpage or made available for download by visitors. The Media Library contains all media items such as images, documents, videos, and audio files.

Publishing basics

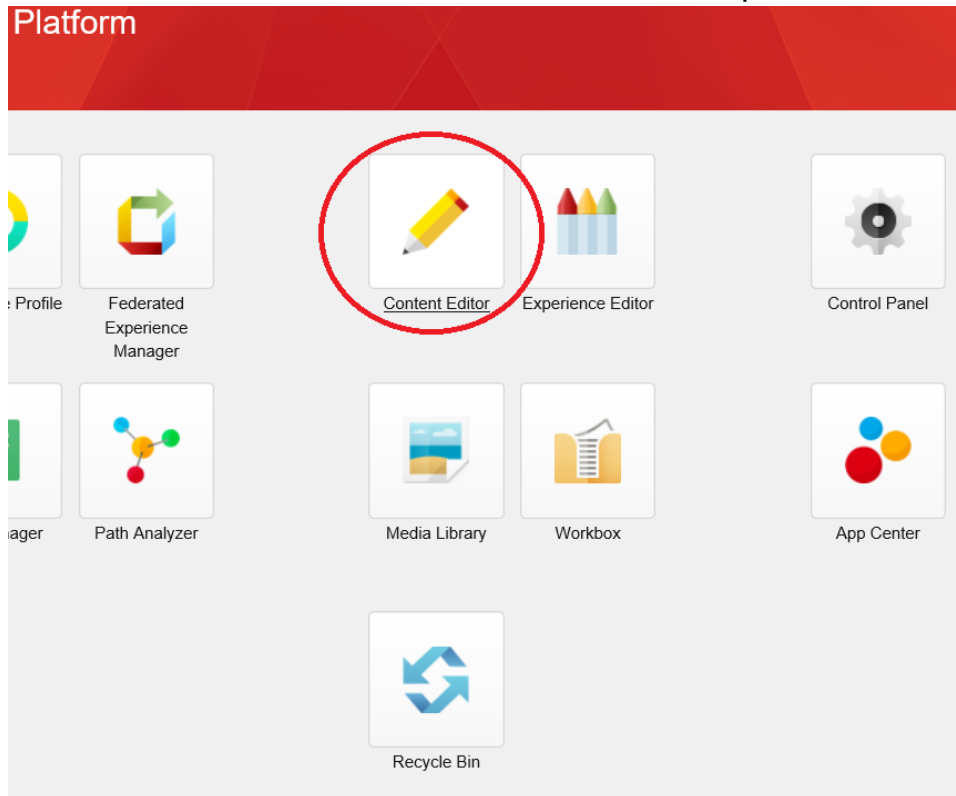
The Content Editor appearance and functionality vary depending on the user's roles, the local security settings, and the customizations that have been implemented on the Sitecore installation.

Log in to Sitecore editing

1. Log on to the Sitecore instance using the predetermined User name and Password.

The image shows a Sitecore login interface. At the top left is the Sitecore logo, a white circle with a stylized 'S' inside. To its right is the text 'sitecore' in a bold, lowercase sans-serif font, with a registered trademark symbol. Below this is the tagline 'Own the experience™'. The main form area has a dark red background. It contains two input fields: 'User name:' with a white text box containing 'UserX' and a small 'x' icon for clearing the field; and 'Password:' with a white text box containing ten black dots. Below these fields is a prominent blue button with the text 'Log in'. At the bottom left of the form area, there is a checkbox labeled 'Remember me' followed by a vertical line and the text 'Forgot your password?'.

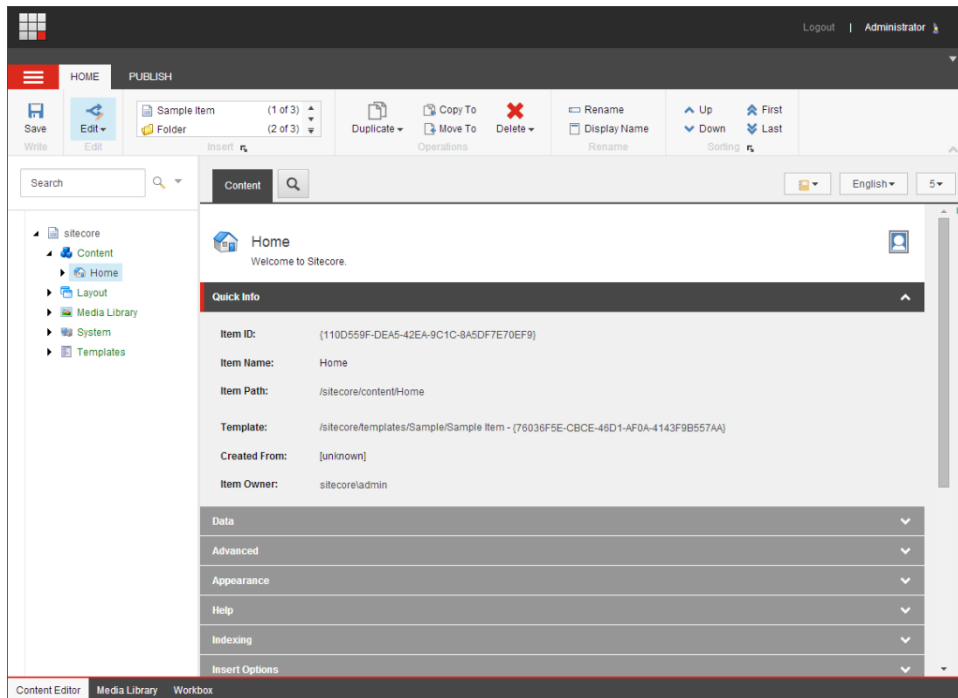
2. Select **Content Editor** in the Sitecore desktop.




Navigating the user interface

The Content Editor's user interface consists of three main areas that you can customize to fit your individual needs when you work in the Content Editor. The three areas are:

- **The ribbon** – the area where all the functionality is available.
- **The content tree** – the area where all the items are organized.
- **The content area** – the area where you can edit your items.



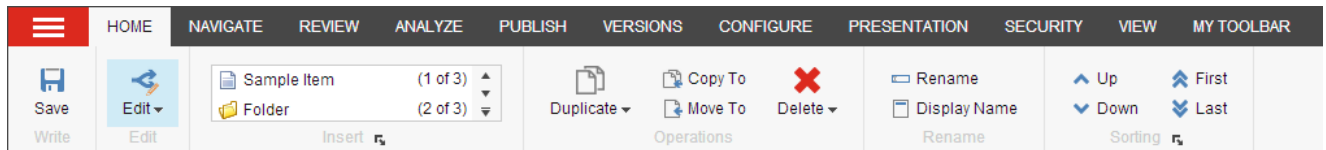
The ribbon

The ribbon consists of the **System menu**  and tabs where all the functionality that you can use in the Content Editor is available.

Depending on your access rights and security settings, the functionalities that are available to you in the ribbon can vary. As a minimum, you can expect to see:

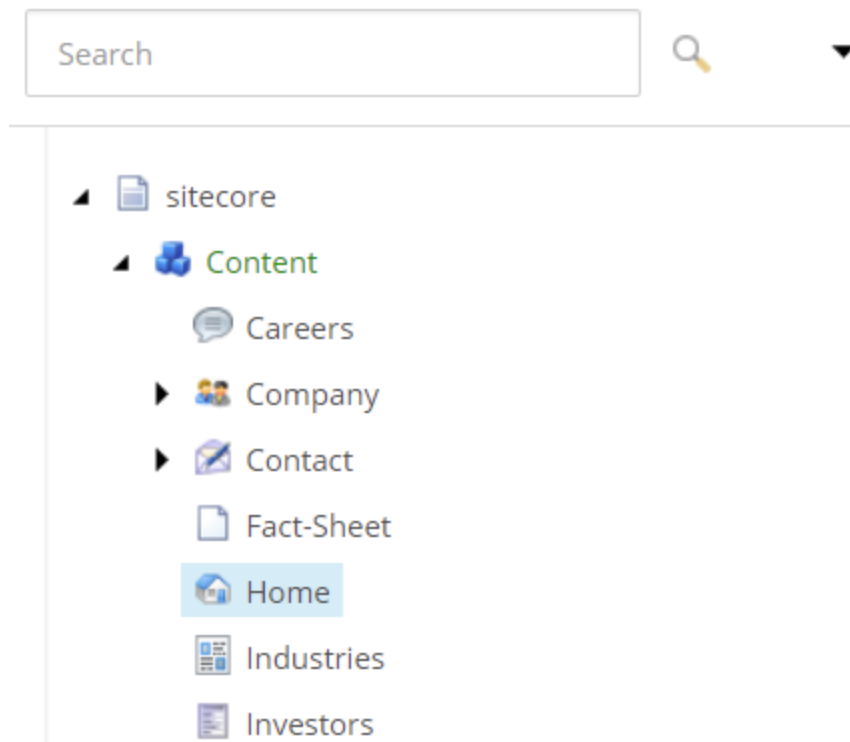


If you have more extensive access rights, you have access to more commands and more tabs. If you have complete access to the Content Editor or if you are a Sitecore administrator, you will see something like this:



The content tree

One of the main features of the Content Editor is the content tree, which presents all the items that are created in your Sitecore installation.



The Sitecore content tree has a similar structure to the one used in Windows Explorer. However, the Sitecore objects and groups are not represented by standard folder and file icons but by many different icons.

You can expand and open every group in the Sitecore content tree just as you can with the folders in Windows Explorer. When there is a plus '+' beside an icon, it contains subitems and can be expanded. When there is a

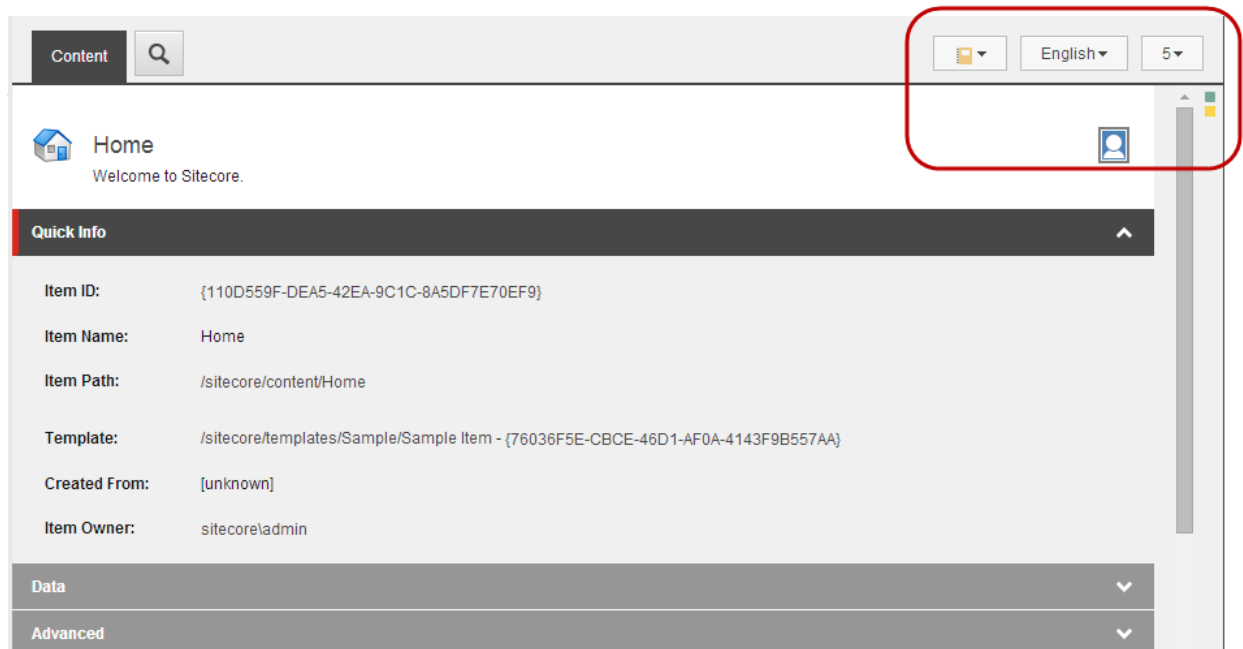
minus '-' beside an icon, it has already been expanded and when there is no symbol, the item contains no subitems.

The content area

The content area is where you edit an item. When you click an item in the content tree, two tabs appear in the content area:

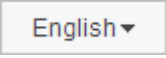



- The **Content** tab, where you can edit any of the item's field values.
- The **Search** tab, where you can search through the selected item.

In the top-right corner of the content area, additional functionality is available that is specific to the item that is selected.



The functionalities are:

- Navigate:**  navigate to a specific section or field in the list of field values.

- **Language:**  toggle between the language versions of the item or create a new language version.
- **Versions:**  toggle between versions of the item or create a new version.
- **Validation warnings:**  move your mouse over the individual icons to see the warnings related to the current item.
- **Edit Profile Cards:**  edit the profile cards that are associated to the item. This is mostly relevant if you are a marketing user.

Create an item in the Content Editor

**Note: This process may only be used to create blogs and news stories.*

When you create a new item in the Content Editor, you must first select an item in the content tree to indicate where you want the new item to be located. You can create a new item as a sibling or a subitem to the item that you select:

- A sibling is an item that you create at the same level as the selected item.
- A subitem is an item that you create under the selected item.

Insert an item

1. In the Content Editor, navigate to the item where you want your new item to be located.
 - Right-click the item in the content tree, click **Insert**, and then click one of the suggested item types.
2. Enter a name for the new item and click **OK**.


Every new item that you create automatically locks and opens in the Content Editor. You must unlock and save your items before other users can work on them.

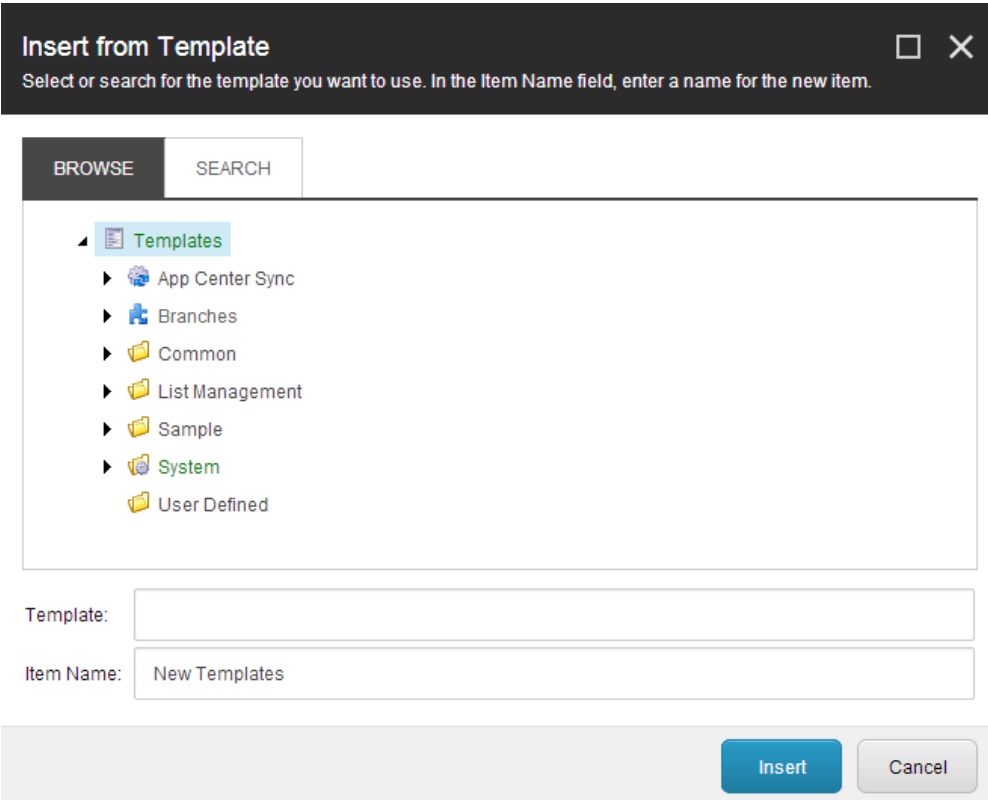
3. As appropriate, edit the new item or add subitems.

Insert an item based on a template

If you have sufficient access rights, you can create a new subitem from any template that is available in your Sitecore installation.

To insert an item from a template:

1. In the content tree, find and select the item that you want to create a subitem for.
2. On the **Home** tab, in the **Insert group**, click the drop-down arrow  and **click Insert from template**.
3. In the **Insert from Template** dialog box, navigate to the template that you want to base the new item on.



Insert from Template

Select or search for the template you want to use. In the Item Name field, enter a name for the new item.

BROWSE **SEARCH**

- ▶ **Templates**
 - ▶ App Center Sync
 - ▶ Branches
 - ▶ Common
 - ▶ List Management
 - ▶ Sample
 - ▶ System
 - ▶ User Defined

Template:

Item Name:

Alternatively, you can right-click the item in the content tree, click **Insert**, and then click **Insert from template**.

Note: To locate the template you can navigate through the content tree on the **Browse** tab, or you can use the **Search** tab to search for the item.

4. In the **Item name** field, enter a name for the new item and click **Insert**.
5. As appropriate, edit the new item, add subitems, or move it to another location.

Important: You can create an item in an item bucket in exactly the same way as you create a regular item. If the template that the new item is based on is bucketable or if you make the item bucketable, the item is hidden in the item bucket. If the item or the item's template is not bucketable, the item is visible in the item bucket. Consequently, you can have an item bucket that is a hybrid of hidden items and visible items.

Edit the website content

When you edit content in rich text fields, you can benefit from the advanced editing functionalities in the Rich Text Editor.

Note: For consistency purposes, **DO NOT** update the size or class of the font. This could cause sizing issues, when viewing from mobile devices.

The Rich Text Editor

The Rich Text Editor is the standard text editor in Sitecore. In this editor, you can edit all the content in a rich text field. In the Rich Text Editor, you can:

- Paste text from Microsoft Word.
- Find and replace text.

- Insert pictures or other media items.
- Insert and delete links to other parts of the website and to external websites.
- Insert symbols.

Note: *The Rich Text Editor is a standard word processing tool, but in Sitecore, most of the formatting functionality has been removed because the style sheets and templates for a website determine the format of the items that content authors create and edit.*

For consistency purposes, DO NOT update the size or class of the font. This could cause sizing issues, when viewing from mobile devices.

Microsoft Word

You can use Microsoft Word as your text editor in Sitecore and benefit from all the functionality that is available in Microsoft Word. You can open the Word field editor from the Content Editor.

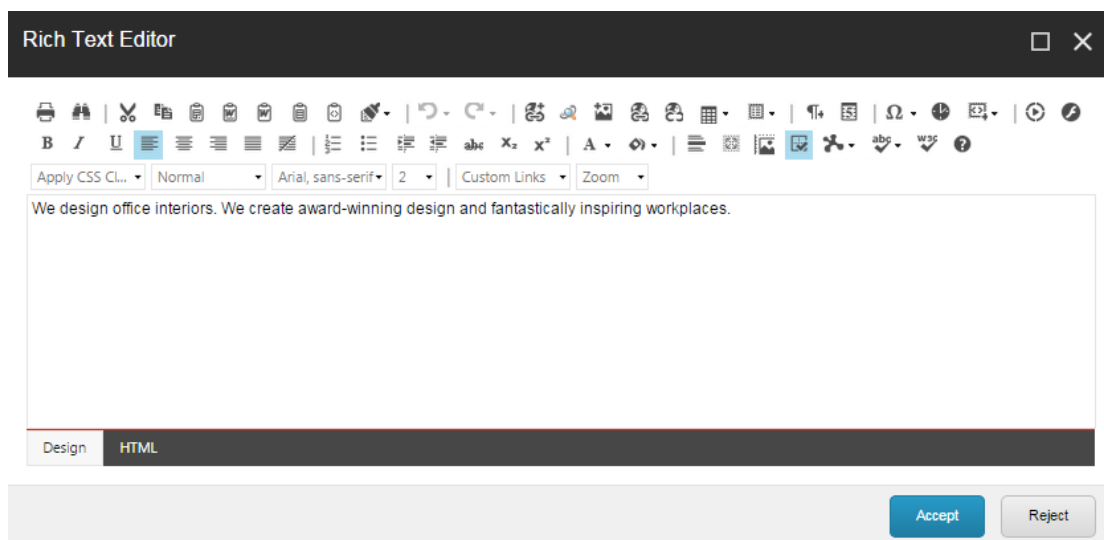
- Insert a link to an item in Sitecore.
- Insert an image from the Media Library.

Important: To edit a text field in the Word field editor, your administrator must set up the text field as a Word field. In addition, make sure to use Microsoft Word 2007 or later and if using Internet Explorer, use Internet Explorer 7 or later. If you use Internet Explorer 8, you must configure your security settings to support Word fields in Sitecore.

Edit a text field

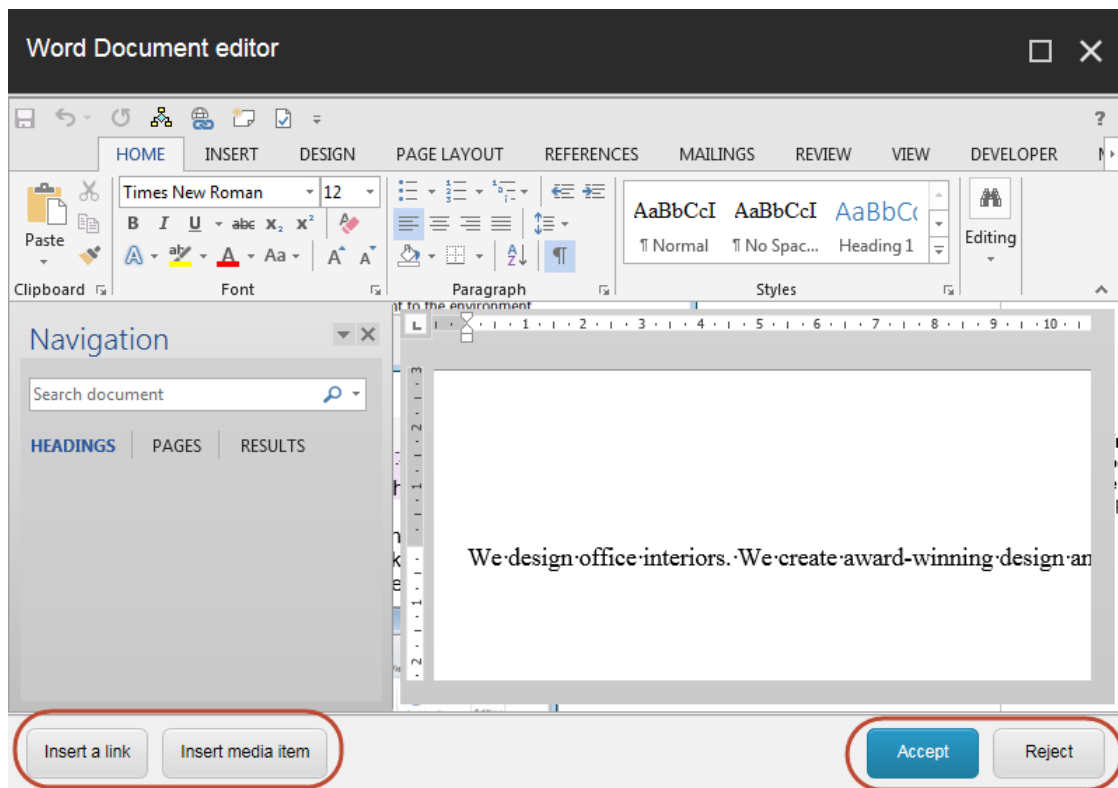
To edit a text field in the Content Editor:

1. In the Content Editor, navigate to the item or page that you want to edit. Make sure to select the relevant version and language of the item.
2. To open the text editor:
 - From the Content Editor – in the content area, locate the Rich Text field you want to edit and click **Show Editor**.
3. Make the appropriate changes to the content in the text field.
 - In the Rich Text Editor, if you prefer to edit the content in HTML format, click **HTML**.



Note: Your Sitecore system administrator controls the features that are available to you. If you need more features, ask your administrator to make them available.

- In a Word field, to insert a Sitecore link to another item on your website, click **Insert a link**. To insert an image from the Media Library, click **Insert media item**. If the image is not available in the Media Library, you can use the insert picture functionality in Microsoft Word.



Note: Images that you want to use regularly, you should upload to the Media Library.

4. When you are finished editing the content, click **Accept** to save your changes.

Lock and unlock an item

In Sitecore, you can lock the item you are working on to prevent other users from editing the same item at the same time. If the item that you want to edit is already locked, you cannot edit it. You can only view it.

When you have finished editing the item, you must unlock the item to make it available to other users again.

Depending on the setup of your Sitecore installation, you may be prompted to lock the item before you can edit it.

A Sitecore administrator can have the authority to edit another user's locked items. Therefore, an administrator and another user can edit an item at the same time. If a user saves changes to an item, and another user saves changes to the same item afterwards, a message box appears, asking the user if the previously saved changes should be overwritten.

Important: Locking an item does not keep it from being published. If you are working on an item and you want to keep it from being published, you need to set up the publishing restrictions for the item.

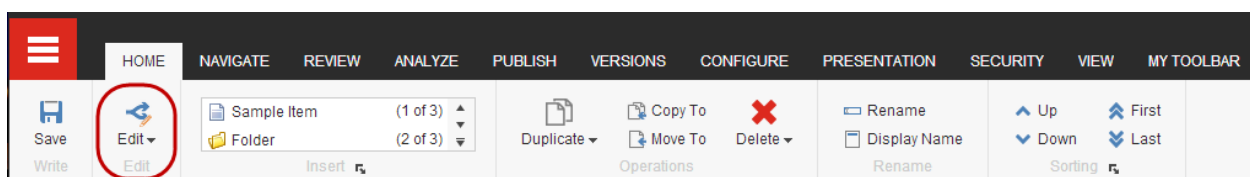
This topic outlines how to:

- [Lock an item](#)
- [Unlock an item](#)

Lock an item

To lock an item manually:

1. In the Content Editor, navigate to the item or page that you want to edit.
 - In the Content Editor, on the **Home** tab, click **Edit** to lock the item.



Note: In the content tree, you can use the Quick actions to see a quick overview of the items that you have locked. Right-click left of the content tree and select **My Locked Items**.

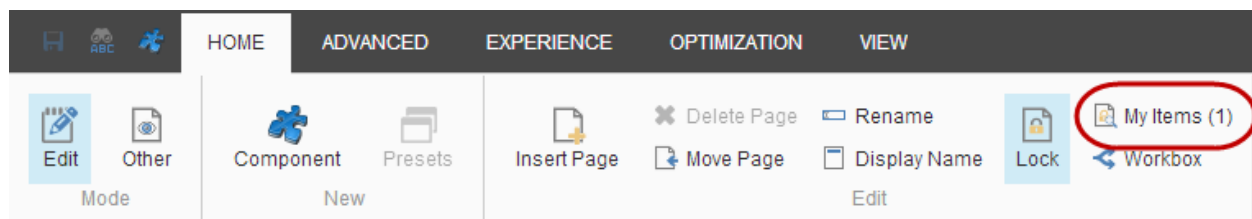
2. When you are finished editing the item, make sure to unlock the item again.

Unlock an item

If you have locked and edited numerous items, you can lose track of them. Sitecore keeps track of all the items that are locked, and by whom. In this way, you can easily lock one or more items at the same time.

To unlock an item:

1. To see a list of the items that are locked by you, or to unlock one or more items:
 - In the Content Editor, on the **Review** tab, in the **Locks** group, click **My Items**.



Note: The number next to the My Items button on the ribbon indicates the number of items that you have locked.

2. In the My Items dialog box, select the items that you want to unlock and click Unlock. To unlock all items at the same time, click Unlock All.

My items □ ×

View or unlock the items that are locked by you.

To group your items by column, drag and drop the column here. Search:

Name	Path
NavLinks	/sitecore/templates/Sample/NavLinks
My item	/sitecore/content/Home/My item

⏪ ⏩ ⏴ ⏵ Page 1 of 1 (2 items)

Unlock Unlock all Close

Delete an item

Inevitably, you will need to delete content items from time to time. In the Content Editor, you can delete an item and all of its versions and subitems, or you can delete a single version of an item.

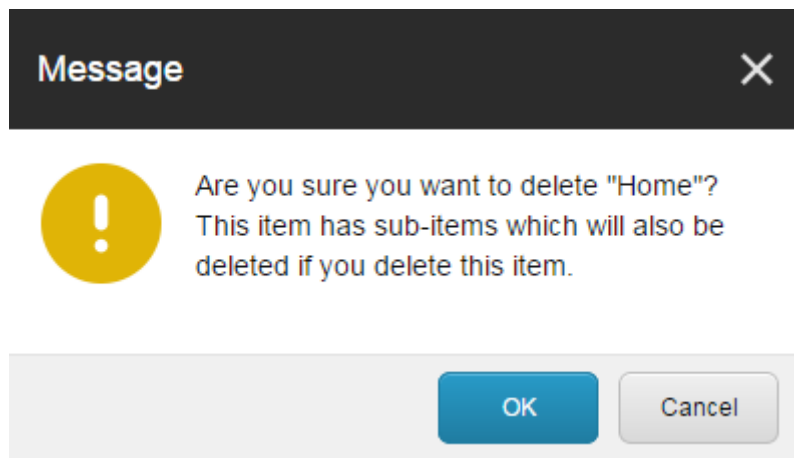
This topic outlines how to:

- [Delete an item and its subitems and versions](#)
- [Delete a version of an item](#)

Delete an item, its subitems and versions

To delete an item and all of its subitems and versions:

1. In the Content Editor, navigate to the item or page that you want to delete.
 - In the Content Editor, on the **Home** tab, in the **Operations** group, click **Delete**. Alternatively, you can right-click the item in the content tree, and click **Delete**.
2. If the item contains subitems, a message appears informing you that the item contains subitems and that these items will be deleted too.
 - To save any of the subitems, click **Cancel** and move them to another location.
 - To delete the item and its subitems, click **OK**. This deletes every version of the item in every language.



If there are links to the item you delete, you must decide how to deal with the broken links in the **Breaking Links** dialog box that opens.


1. In the **Breaking Links** dialog, you can:
 - **Remove links** – remove all the links that exist to this page.
 - **Link to another item** – change all the links to this page to link to another item.

- **Leave links** – manage the broken links in the Broken links report.

Breaking Links □ ✕

Other items contain links to this item or its subitems. These links should be updated to prevent broken links.

Items to delete

 **Sample Item**
/Home/Sample Item

Action

Remove links

Link to another item

Leave links – the links will appear in the Broken Links report

2. To open the item that links to the item you want to delete and edit the link directly from there, click **Edit Links**. In the **Edit Link** dialog box, click **Edit**.
3. In the **Breaking Links** dialog box, click **Continue**.
4. If you selected **Link to another item**, in the content tree, click the item that you want to link to instead. To update the link, click **OK**.

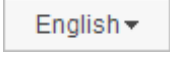
Delete a version of an item

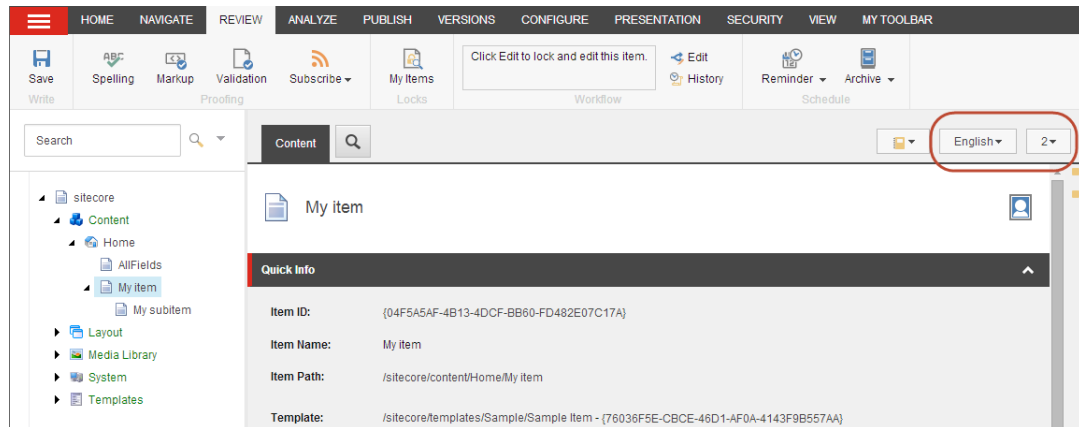
If you have created several different versions of an item, you can delete individual versions of the item without deleting the item or any of its other versions or subitems.


To delete a version of an item:

1. In the content tree, locate the item that has a version that you want to delete.

2. If the item is available in multiple languages or versions:

- Click the **Language** button  and select the language version that you want to delete.



- Click the **Versions** button  and select the version that you want to delete.

3. On the **Versions** tab, in the **Versions** group, click **Remove**. The version that you have selected is deleted.


Create an anchor and link to it

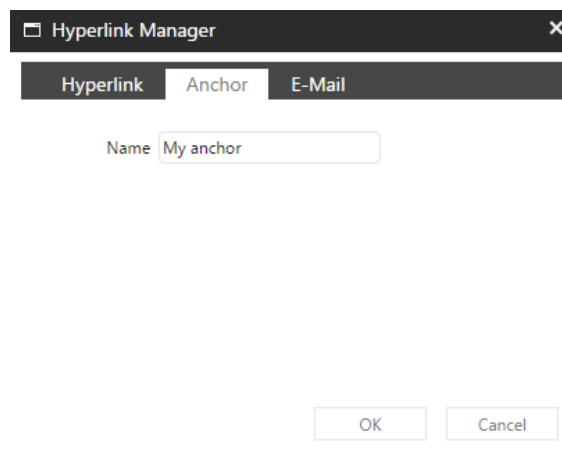
An anchor is an HTML code that is used as a bookmark to create a link to a particular section within a page, for example, it could be a *Back to top* link that takes the user to the top of the current page.

In Rich Text fields, you can use the Hyperlink Manager to create an anchor in your text, and then to create the link to your anchor.

Note: In Word fields, you cannot access the Hyperlink Manager. Instead, you must use the Hyperlink functionality within Microsoft Word.

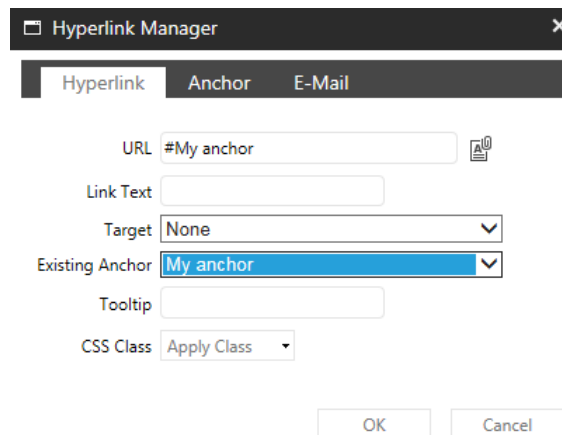
To create an anchor:

1. In the Content Editor, navigate to the item where you want to insert an anchor.
2. Open the Rich Text Editor and select the text or image that you want make an anchor.
3. Click the **Hyperlink Manager** .
4. In the **Hyperlink Manager dialog**, click the **Anchor** tab and in the **Name field**, enter a unique name for the anchor.



The screenshot shows the 'Hyperlink Manager' dialog box with the 'Anchor' tab selected. The 'Name' field is filled with the text 'My anchor'. There are 'OK' and 'Cancel' buttons at the bottom right.

5. Click **OK**.
6. To create a link to this anchor, highlight the text that you want to add the link to and click **Hyperlink Manager**. On the **Hyperlink tab**, in the **Existing Anchor** field, choose the anchor you created and click **OK**.



The screenshot shows the 'Hyperlink Manager' dialog box with the 'Hyperlink' tab selected. The 'URL' field contains '#My anchor'. The 'Existing Anchor' dropdown menu is open, showing 'My anchor' selected. There are 'OK' and 'Cancel' buttons at the bottom right.

Copy or duplicate an item

In the Content Editor, you can create a new item by copying or duplicating an existing item

Note: For items requiring a date stamp (blogs or other insights documents), creating NEW items is preferred to copying or duplicating.

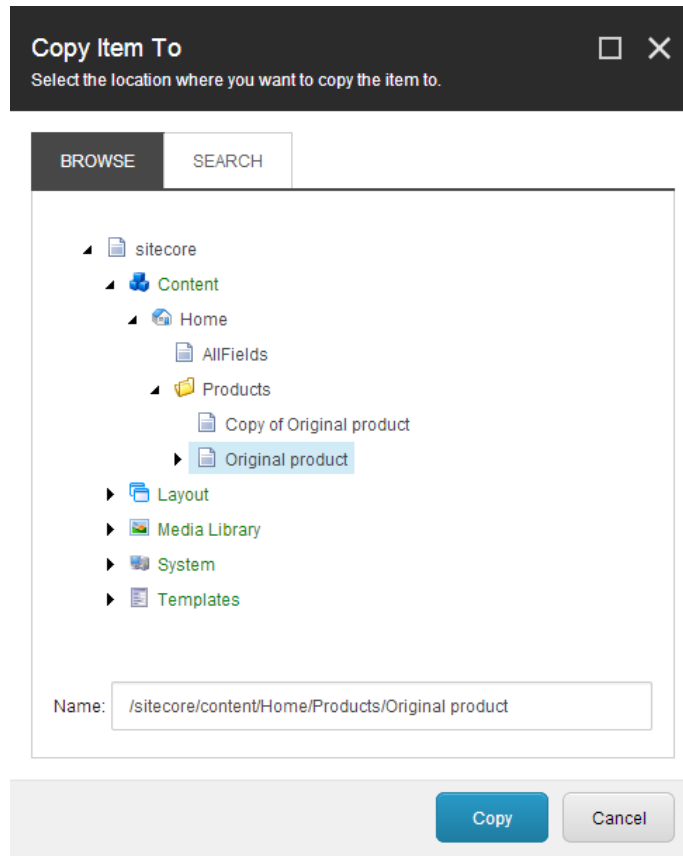
- **Copy an item** – copies the selected item and all its content and subitems to a location in the content tree that you specify.
- **Duplicate an item** – copies the selected item and all its content and subitems to the same location in the content tree.

Note: In Internet Explorer, you can also copy, cut, and paste items to and from the clipboard. The clipboard functionalities are available on the **Home** tab, in the **Clipboard** group, but due to JavaScript restrictions in other browsers, the **Clipboard** group appears only in Internet Explorer.

Copy an item

To copy an item to another location:

1. In the content tree, locate and select the item that you want to copy.
2. On the **Home** tab, in the **Operations** group, click **Copy to**.
Alternatively, you can also right-click the item in the content tree, click **Copying** and then **Copy to**.
3. In the **Copy Item To** dialog box, select the location where you want the copy the item to be stored.



Note: You can navigate to the location through the content tree on the **Browse** tab, or you can search for the location on the **Search** tab.

4. Click **Copy** to create a copy of the item in the specified location.

Now you can edit the new item, add subitems, or move the item to another location.

Note: To copy multiple items at the same time, you must **run a search** for all the items that you want to copy and use the Copy results to **search operation**.

Duplicate an item

To duplicate an item:

1. In the content tree, locate and select the item that you want to duplicate.
2. On the **Home** tab, in the **Operations** group, click **Duplicate**.
Alternatively, you can right-click the item and click **Duplicate**.
3. Enter a name for the new item and click **OK**.

Now you can edit the new item, add subitems, or move the item to another location.


Preview a webpage

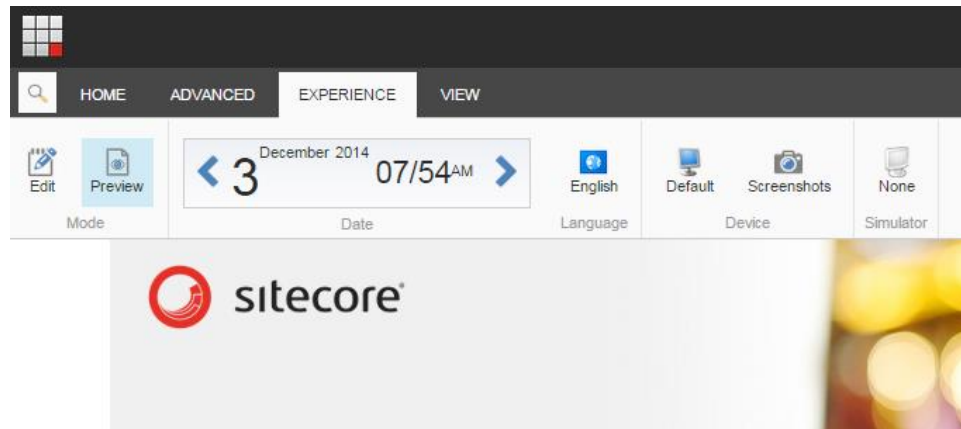
The preview functionality lets you preview all your items on your website without publishing them first.

The preview functionality lets you:

- Specify a preview date, so that you can view your website in the past or future, according to the **publishing restrictions** that are set up.
- See how a webpage looks in different language versions.
- Preview how the page displays on different devices.

To preview a webpage:

1. From the Content Editor, on the **Publish** tab, in the **Publish** section, click **Preview**.
2. On the **Experience** tab, select the preview parameters:
 - **Date** – to specify another date to preview the webpage, in the Date group, click the date, or click the blue arrows to select the previous day or the next day.
 - **Language** – to view the page in a different language, in the Language group, click **Language**  English.



Note: The Experience tab might not be available to you if you do not have the necessary security permissions. Also, if the navigation links are showing up but not the full ribbon, click the down arrow on the right.

3. Navigate through the pages to preview your whole website.

Tip: In the preview mode, you can also use the search functionality to navigate to a specific page that you want to preview.

Publish and unpublish an item

When you edit or create new items in Sitecore, they must be published before they appear on your website. This lets you save unfinished items and decide exactly when the items are launched to the website. Conversely, when an item needs to be removed from the site, it must be unpublished.

When you work in Sitecore, the items you save are saved to the Master database. When you publish items, the items are copied from the Master database to a publishing target, and from the publishing target, the website is launched. The default publishing target in Sitecore is the Web database.

You can choose to publish the entire website or a single item:

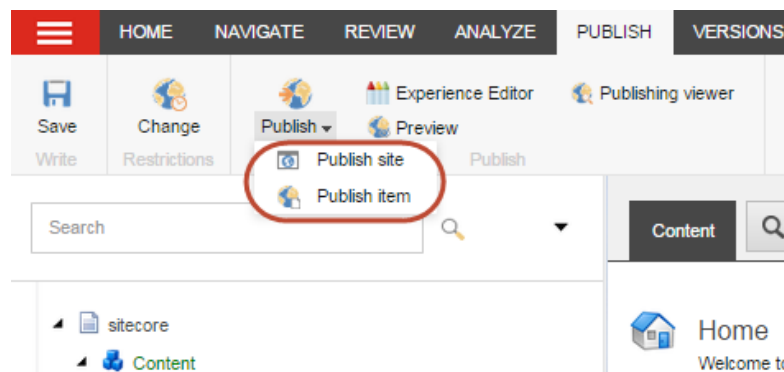
- **Site publishing** – publishes your entire website starting from the root of the content tree. You can publish a site from the Content Editor or from the Sitecore Desktop. **Only to be used if all changes in Sitecore should be published.**
- **Item publishing** – publishes the item you select in the Content Editor. The item can only be published if all its ancestors have been published. With item publishing, you can choose to include all of the selected item's subitems and related items.

Site publishing

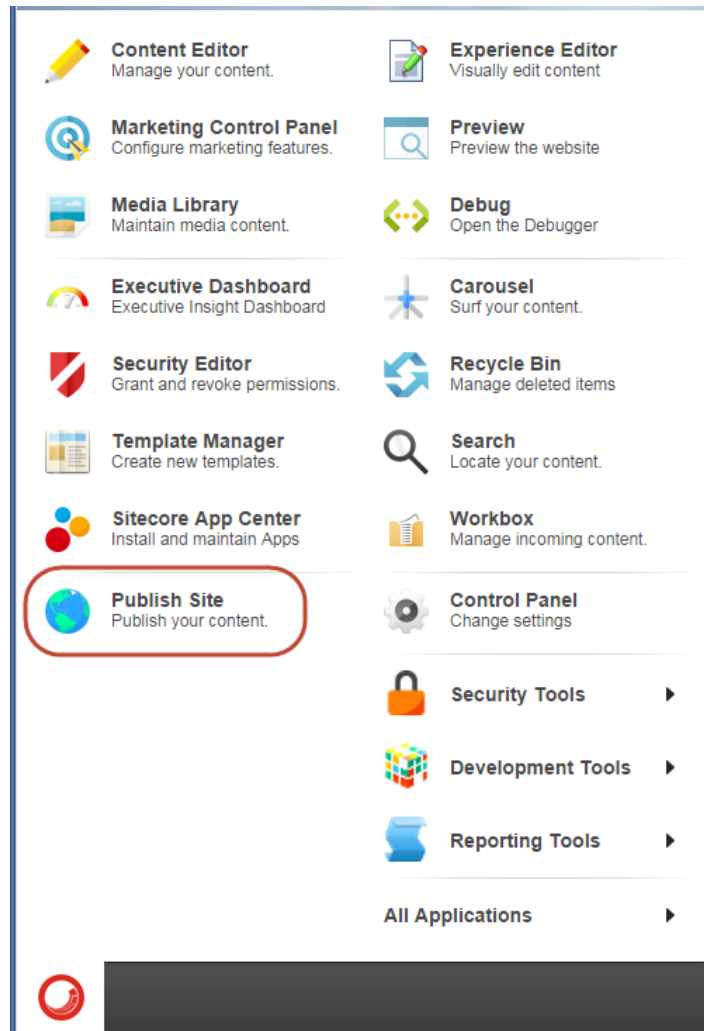
When you are ready to publish your website, you can run the publishing wizard, which guides you through the steps of publishing in Sitecore. You can run the publishing wizard from the Content Editor and the Sitecore Desktop.

To publish the entire website:

1. Open the **Publish Site** wizard from one of two locations in Sitecore:
 - From the **Content Editor** – on the **Publish** tab, in the **Publish** group, click the **Publish** drop-down arrow, and select **Publish site**.



- From the **Sitecore Desktop** – click **Sitecore Start** , and then click **Publish site**.



2. In the **Publish site** wizard, specify the publishing mode for the website you are publishing:

- **Incremental Publish** – publishes only items that are in the publishing queue. Every time you change an item, the item is automatically added to the publishing queue. If the changed item is part of a workflow, the item is added to the publishing queue when it reaches the final workflow state.

Incremental Publish is the fastest way of publishing because Sitecore does not use resources to compare versions of the items that are in the publishing queue before publishing them.

Note: *Incremental Publish is only available when you publish the entire website.*

- **Smart Publish** – publishes all items that have changed since the last publication. When you run a Smart publish, every item in the Master database is compared with the equivalent item in the target database and, if an item has changed, it is published.

Comparing all items in the database makes this a time-consuming way of publishing your entire website, particularly if the content tree contains many items.

- **Republish** – publishes everything. Republish overwrites every item in the target database with the equivalent item from the Master database, even if it has not changed. In this way, republishing removes all obsolete versions from the target database. You can use republishing to bring a new web database online, to restore a backup of the master database, and to add a new content language, a new publishing target, or other system items to the website.

Publish Site □ ×

Select the relevant publishing settings for your website

Publishing

Incremental publish - publish only changed items.

Smart publish - publish differences between source and target database.

Republish - publish everything.

Publishing language

Select all

English

Publishing targets

Internet (web)

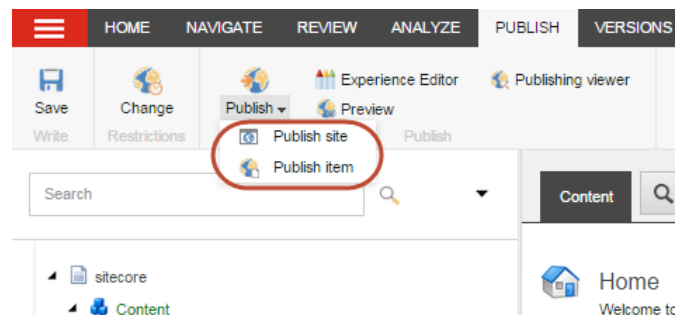
3. In the **Publishing language** section, specify the language versions that you want to publish.
4. In the **Publishing targets** section, specify the publishing targets that you want to publish to.
5. **Click Publish.** When the publishing completes, you can see how many items were processed during publishing and the number of items created.


Item publishing

When you are ready to publish an item to your website, you can run the publishing wizard, which guides you through the steps of publishing in Sitecore. You can run the publishing wizard from the Content Editor.

To publish a single item:

1. Open the **Publish Item** wizard from one of two locations in Sitecore:
 - From the **Content Editor** – select the item that you want to publish. On the **Publish** tab, in the **Publish** group, click the **Publish** drop-down arrow, and select **Publish item**.



Note: To publish the selected item in all languages to all publishing targets and avoid going through the steps of the **publishing** wizard, click **Publish** .

2. In the **Publish Item** wizard, on the **Settings** page, specify the publishing mode:

- **Smart publish** – publishes the selected item if it has changed since the last publication. When you run Smart Publish, the selected item in the Master database is compared with the equivalent item in the target database and, if the item has changed, it is published. When you are publishing single items, Smart Publish is a quick way to make sure that all changes to a specific item and its subitems are published.
- **Republish** – publishes everything. Republish overwrites the selected item in the target database with the equivalent item from the Master database – even if it has not changed. In this way, all obsolete versions are removed from the target database. You can use republishing to restore a backup of the master database and to add a new content language, a new publishing target, or other system items.

Publish Item □ ×

Select the relevant publishing settings for the item.

Publishing

- Smart publish - publish differences between source and target database.
- Republish - publish everything.

Publish subitems

Publish related items

Publishing language

- Select all
- English
- German (Germany)

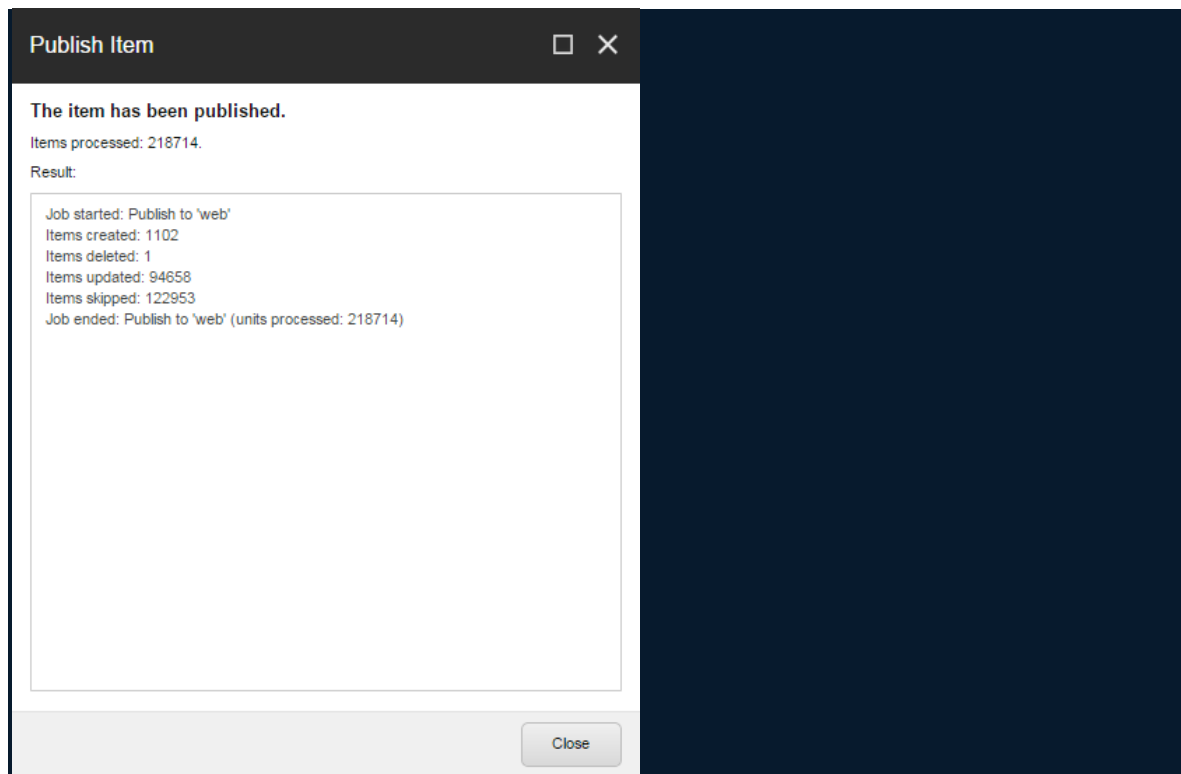
Publishing targets

- Embargo ()
- Internet (web)
- QA ()

Publish **Cancel**

3. To publish all the subitems of the selected item, select **Publish subitems**.

4. To publish all the related items to the selected item, select **Publish related items**. Related items can be:
 - Clone references – items that are clones of the selected item.
 - Media references – media items that are related to the selected item.
 - Alias references – items that are aliases of the selected item.
5. In the **Publishing language** section, specify the language versions that you want publish.
6. In the **Publishing targets** section, specify where you want to publish the items to.
7. Click **Publish**. When the publishing completes, you can see how many items were processed during publishing and the number of items that were created, deleted, or updated on the target database.

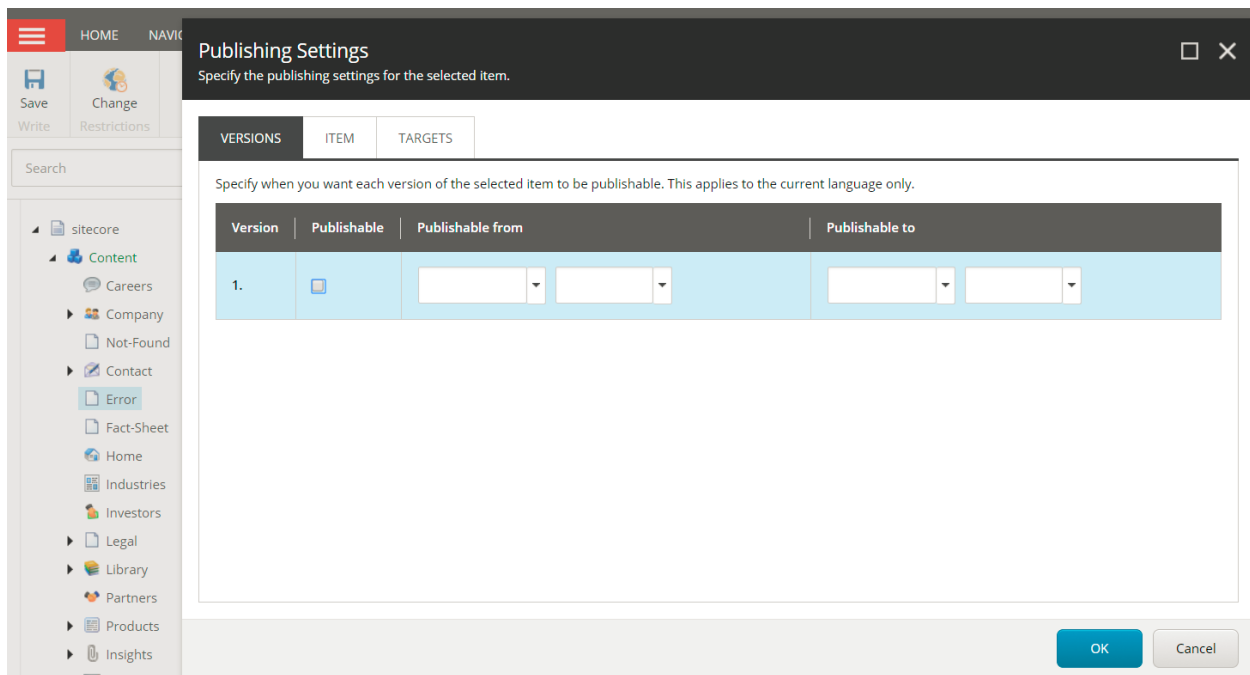


Unpublishing

If you decide to remove a page from the site, you will need to unpublish it, to make sure it cannot be discovered:

To unpublish a page:

1. In the **PUBLISH** tab, select **Change** and uncheck the box under **Publishable**, then click the **OK** button.



2. Follow the instructions in the [Item Publishing](#) section to complete the process.

Note: Using the dropdowns to determine unpublishing dates is not recommended. Manually unpublishing an item – as detailed above – is preferred.

Work in workflows

To ensure that only items that have been approved are published, you can use workflows to formalize and enforce your company processes and procedures.

A workflow is a series of states that reflects the work processes and procedures for creating web content in your organization. For example, your workflow states can correspond to the creation, review, and approval stages that items must go through before they are published on your website.

A workflow can contain any number of workflow states and be as simple or complex as required. Items do not necessarily have to move through all the workflow states that you have defined — some states can be optional or only applicable to certain kinds of content.

- [Edit an item and move it to the next workflow state](#)

Note: An administrator can overwrite any of these workflow states and move an item through the states or publish the item at any given time.

Furthermore, you can implement any number of different workflows. As a minimum, each workflow must contain two workflow states – one that is the initial workflow state and one that is the final workflow state. You can only publish an item in a workflow, if it is in the final workflow state.

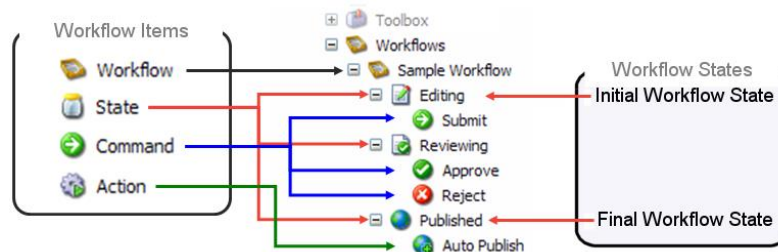
Typically, developers implement workflows, but it can be useful for content authors to understand how a workflow is constructed and implemented.

The following workflow items are stored in the content tree:

- **Workflows** – the main item that contains all the subitems that make up the workflow.
- **States** – the basic building blocks of the workflow. The workflow states represent the different stages in your content creation process.

- **Commands** – the actions that must be performed by contributors to move the items through the workflow states.
- **Actions** – the actions that are automatically performed on the items when they are in particular workflow states or when particular workflow commands are executed.

An example of a workflow:



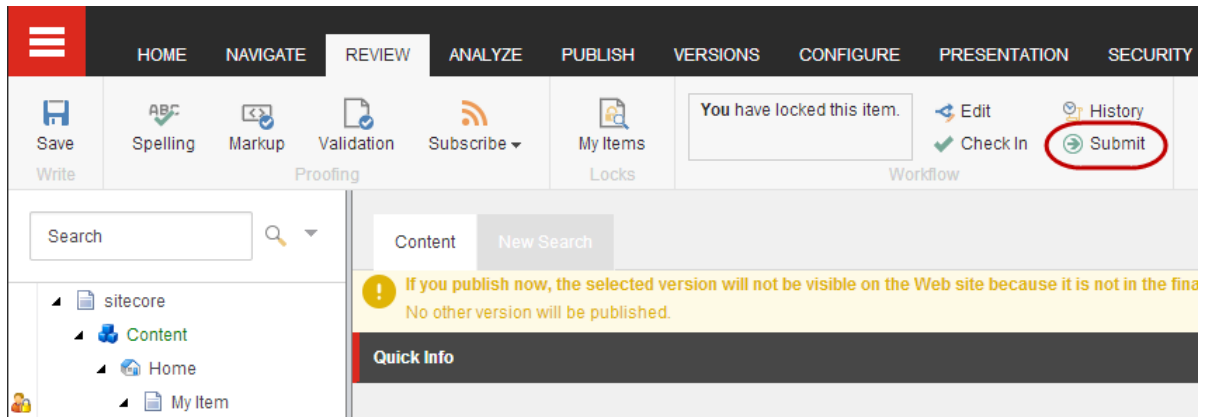
After the workflow has been defined, the developer specifies the item templates that are subject to the workflow. Every time a content author creates or edits an item that is based on one of these templates, the item is sent to the initial workflow state of the workflow.

Edit an item and move it to the next workflow state

To send a content item to the next workflow state:

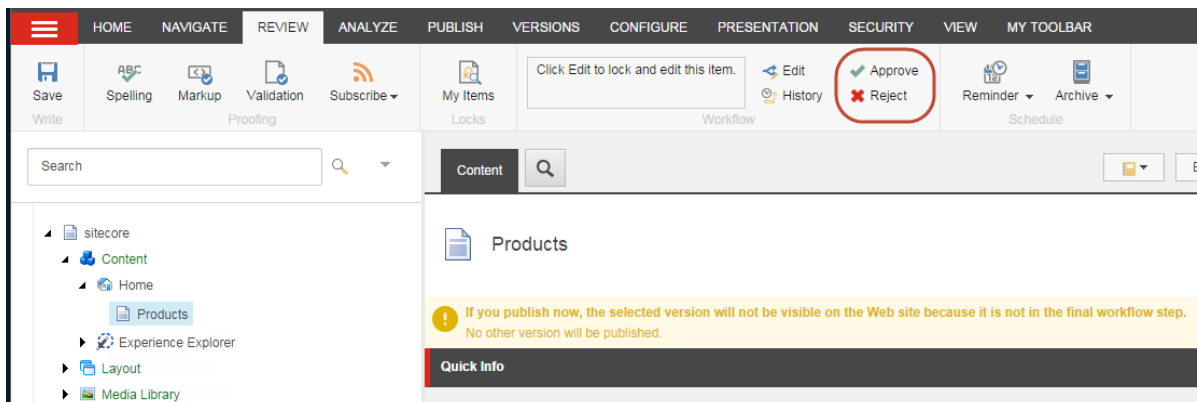
1. In the Content Editor, navigate to the relevant item or page.
2. Edit the item and save your changes.
3. If the item is in a workflow, you can see the available workflow commands:
 - In the Content Editor, on the **Review** tab, in the **Workflow** group.

In the following example, the workflow command *Submit* is displayed, and therefore this is the only workflow command that you can apply to this item in its current workflow state.



4. Click the relevant workflow command to send the item to the next workflow state.
5. In the dialog box that appears, you can enter a comment about the page you have edited, and click **OK**.

The item is now in the next workflow state and new workflow commands are available in the notification bar. If you do not have permission to edit the item in the current workflow state, you cannot lock the item for editing, and the workflow commands are not displayed.

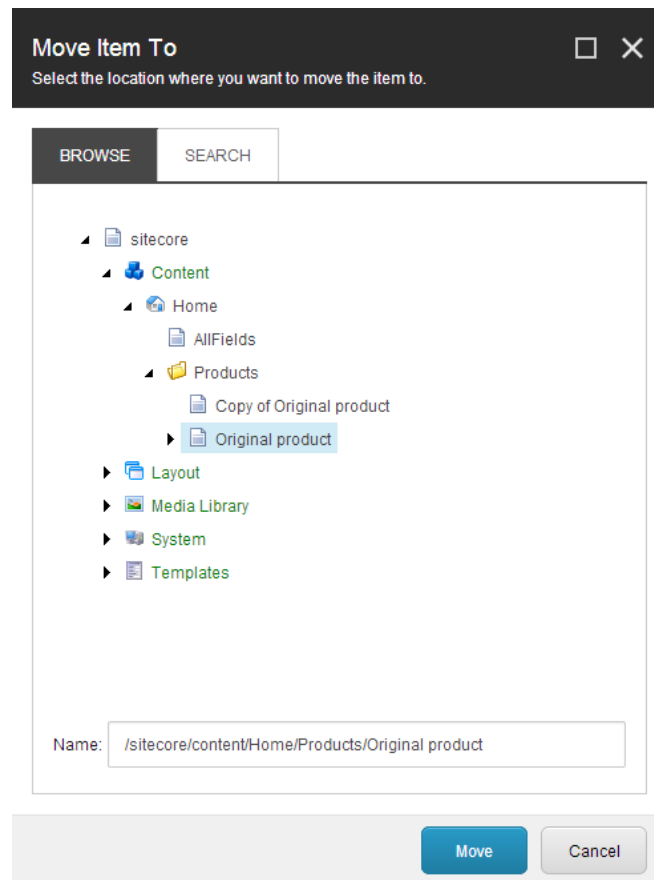


Move an item

You can move an item to a different location in the Content Editor.

To move an item:

1. In the Content Editor, navigate to the item or page that you want to move.
 - On the **Home** tab, in the **Operations group**, click **Move to**.
Alternatively, you can right click the item in the content tree, click **Copying** and then click **Move to**.
2. In the **Move Item To** dialog box, select the location that you want to move the item to. You can navigate to the location in the content tree on the **Browse** tab or search for the location on the **Search** tab.



3. Click **Move**.

Insert an image

In the Content Editor you can insert various types of media, typically images, into an image field, a Rich Text field, or a Word field. These media items can be images, animations, film clips, sound files, and so on.

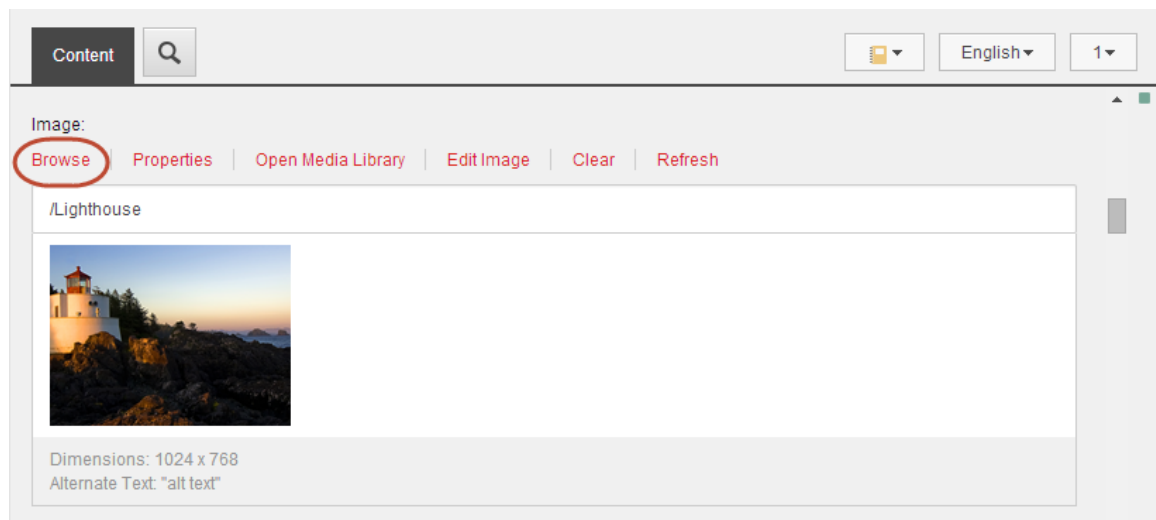
This topic outlines how to:

- [Insert an image into an image field](#)
- [Insert an image into a text field](#)

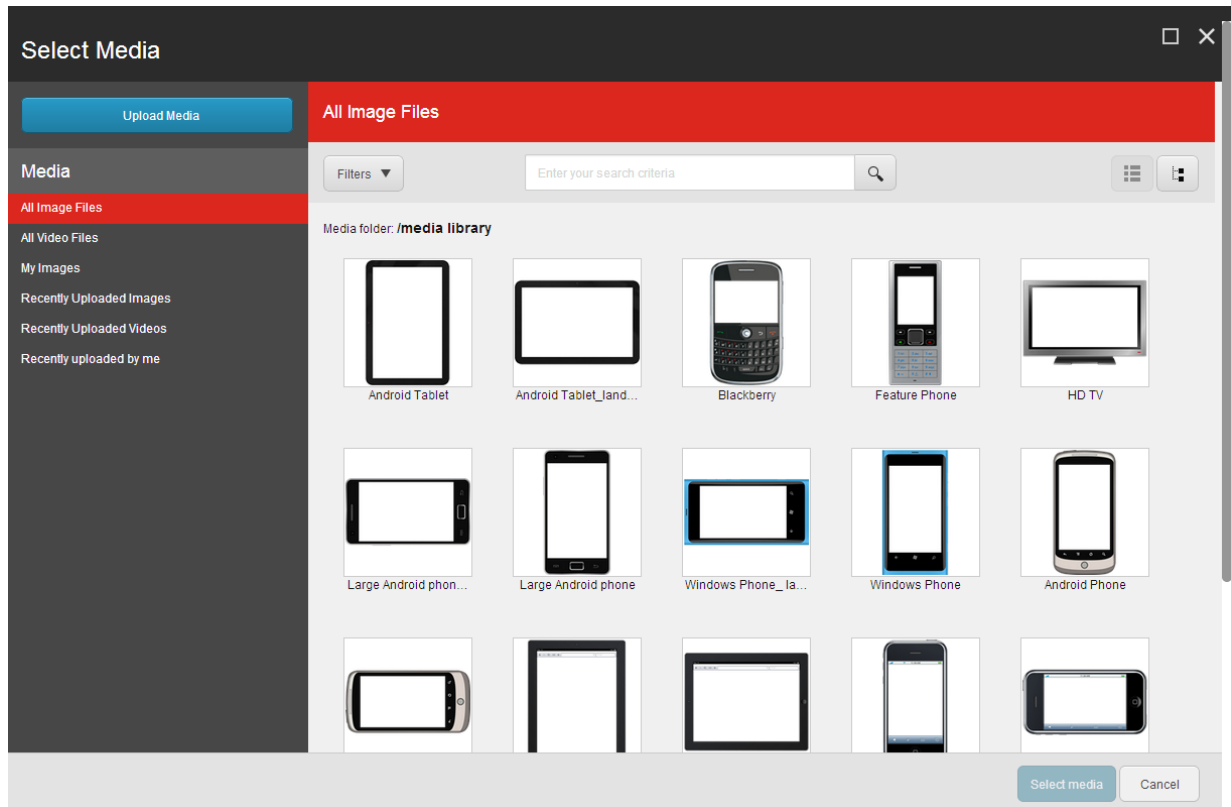
Insert an image into an image field

To insert or change an image in an image field:

1. In the Content Editor, navigate to the item or page that you want to edit:
 - In the Content Editor, click the **Content** tab, locate the image field where you want to insert an image and click **Browse**.

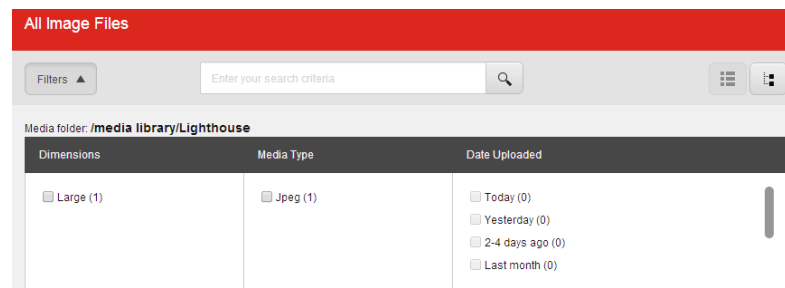




2. The **Select Media** dialog box displays all the items from the Media Library that are available for the image field you have chosen.



The items in the **Select Media** dialog box are not listed in any particular order, so use the search functionality or the predefined lists from the menu to find your image:

- In the **Media** menu, use the links to quickly get a complete list of All image files, All video files, My images, Recently uploaded images, and Recently uploaded videos.
- To filter the displayed media items according to specific metadata of the image, click the **Filter** drop-down arrow and select the required filters. The number in parenthesis indicates how many items are available for the filter.




- To search for a specific item, enter a search word in the **Search** field.
 - To navigate through the content tree to find the image that you want to use, click **Tree View**  in the upper right corner. To go back to the list view, click **List view** .
3. Select the image that you want to use, click **Select Media**, and the new image is inserted into the image field.

Note: *If the image that you want to use is not available, click **Upload media** to upload a new image to the Media Library.*

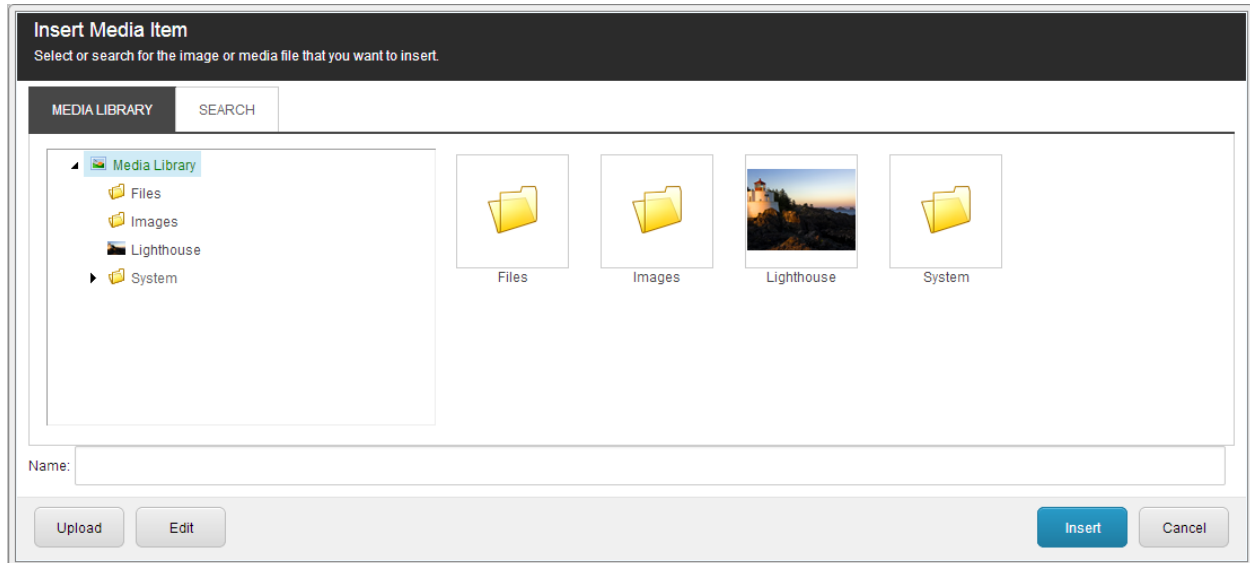
Insert an image into a text field

To insert a media item into a text field:

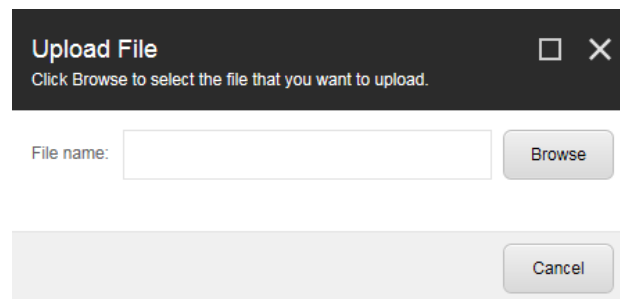
1. In the Content Editor, navigate to the text field, where you want to insert a media item.
2. You can insert the image in one of the following fields:
 - To insert the image in the Rich Text Editor, open the editor from a Rich Text field and click **Insert Sitecore Media** .
 - To insert the image in a Word field, open Microsoft Word from a Word field and **click Insert Media**.

Note: *If you do not see the **Insert Image** button in the floating toolbar, click the **More** drop-down arrow.*

3. If the image is already in the Media Library, in the **Insert Media Item** dialog box, find and select the image that you want to insert and then click **Insert**. To locate the image, you can navigate through the content tree on the **Media Library** tab, or you can search for the item on the **Search** tab.



4. If the image is not available in the Media Library, click **Upload**.
5. In the **Upload File** dialog box, click **Browse** and then select the image file that you want to use.



6. In the **Open dialog**, click **Open** to upload the image file to the Media Library.
7. The image file opens in the Content Editor. To save the new image and return to **the Insert Media Item** dialog box, click **Save/Close**.
8. To insert the image in the text field, click **Insert**.

Note: If you click **Cancel**, the **Insert Media Item** dialog box closes, but the new item remains in the Media Library.

Upload a file to the Media Library

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

- **[Upload files](#)** – use this option to upload a single file or multiple files from the same location.
- **[Upload files \(advanced\)](#)** – use this option to apply certain upload options. For example, you can upload a Zip archive or overwrite duplicates.
- **[Drag & Drop](#)** – use this option to upload a single file or multiple files by dragging them from Windows Explorer to the Sitecore Media Library.

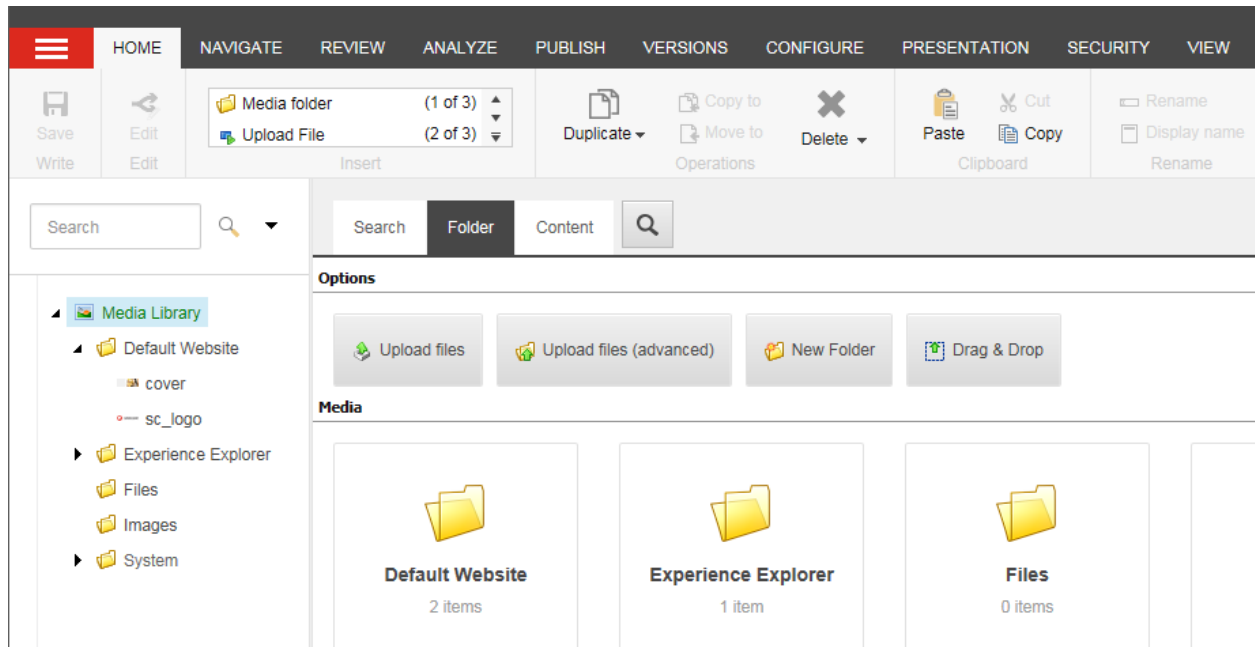
Note: *The drag-and-drop functionality is currently only supported in Internet Explorer 7 or later. If you use a different browser such as Mozilla Firefox, you must use the **Upload files** and **Upload files (advanced)** options to upload your files to the Media Library.*

Media files that you upload to the Media Library are not versionable by default. To make a media file versionable means that a new version of the media item is created automatically every time you edit it. In this way, after you have edited a media item, you have the option to revert back to an older version of the item. To make a media file versionable, you must either use the *Upload files (advanced)* option or set up the *Drag & Drop* option to make all media files that are uploaded that way versionable by default.

Upload files

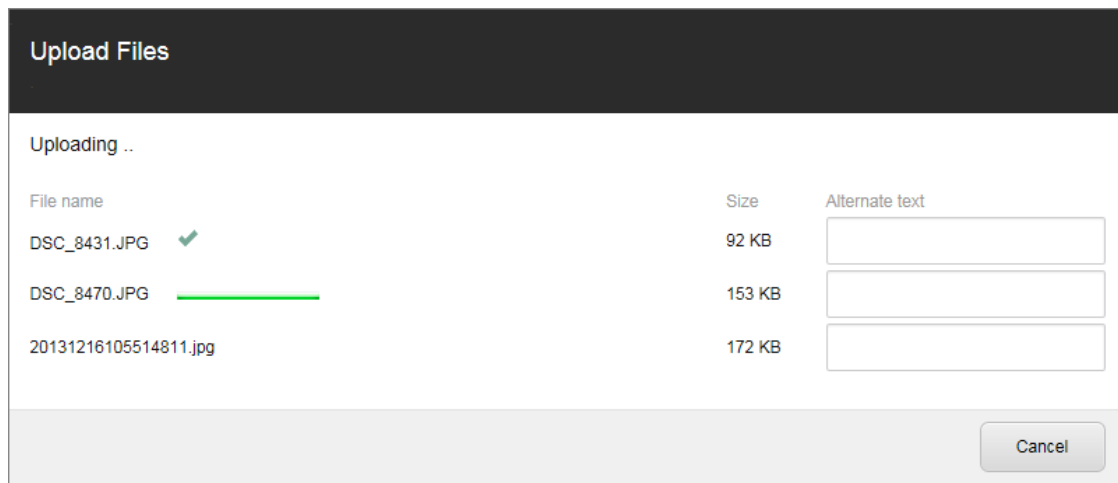
To upload a single media file:

1. In the Media Library, in the content tree, select the folder where you want to upload your media files to.
2. In the editing pane, on the **Folder** tab, click **Upload files**.



3. In the **Select file(s) to upload** dialog box, browse to and select the media file that you want to upload and click **Open**.

Note: To select multiple files, press and hold the **CTRL** key when you select the files.



In the editing pane, on the **Folder** tab and in the **Media** section, you can see the images that you uploaded. The new items may contain a warning that you can remove if you open the media item and enter an alternate text in the **Alt** field.

Upload files (advanced)

To upload files and apply certain upload options:

1. In the Media Library, in the content tree, select the folder that you want to upload your media files to.
2. In the editing pane, on the **Folder** tab, click **Upload files (advanced)**.
3. In the **Select file(s) to upload** dialog box, browse to the folder on your computer that contains the images you want to upload.

Note: To select multiple files, press and hold the CTRL key when you select the files.

4. Click **Open**.
5. In the **Upload Files** dialog box, enter an alternate text for each media file and select the relevant upload option check boxes.

Batch Upload □ ×

Choose the file that you want to upload. You can select as many files as you want.

Select the files to upload here:

No file chosen

Unpack ZIP archives Make uploaded media items versionable

Overwrite existing media items Upload as files

Uploaded media items:

Upload option	Description
Unpack ZIP archives	<p>Select this option to upload and extract a Zip archive to the Media Library.</p> <p>In the .zip file, you can include subfolders with files. The folder structure is re-created in the Media Library after the files are extracted.</p>
Make uploaded media items versionable	<p>Select this option to make the media file versionable. This creates the media file in the selected language only, and any other language version that you want you need to create manually.</p>
Overwrite existing media items	<p>Select this option to upload a file with the same name as a file that already exists in the Media Library, if you want to overwrite the existing file.</p> <p>If you do not select this option, a duplicate file is created in the Media Library.</p>
Upload as files	<p>Select this option to store the file in the file system rather than in the database.</p>

6. Click **Upload** and the uploaded images are available in the selected folder in the Media Library.

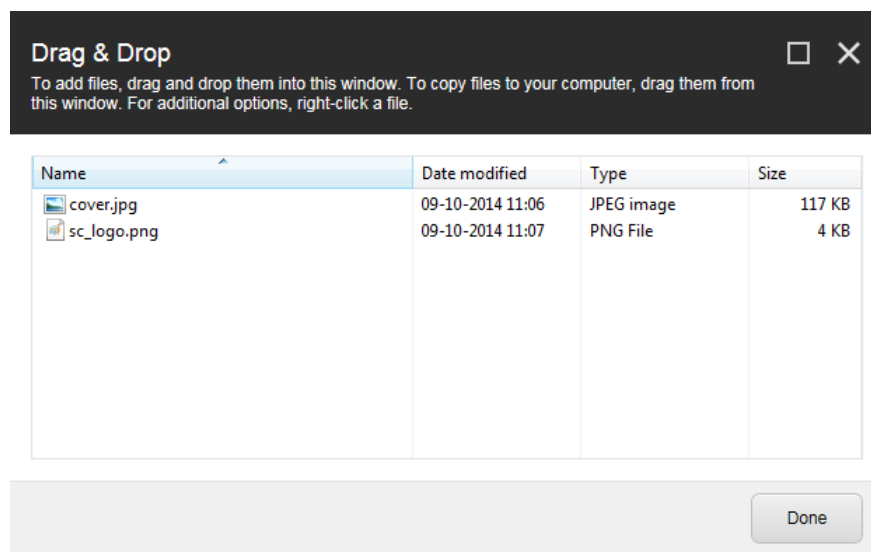
Drag & Drop

If you work in Internet Explorer 7 or later, the drag-and-drop option is the quickest and easiest way to upload media files to the Media Library. You can upload single or multiple files from your computer to the **Drag & Drop**

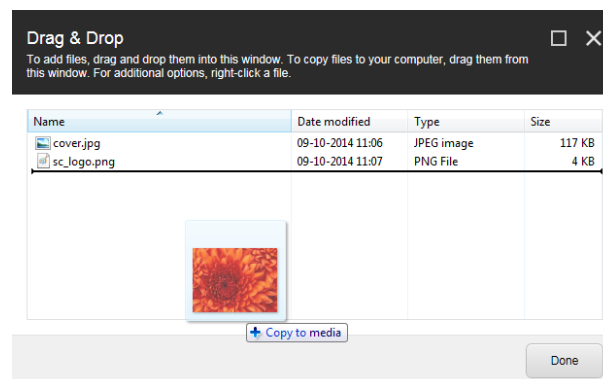
dialog box. This is especially useful when you want to upload many files to different locations in Sitecore or from different locations on your computer.

To drag and drop files to the Media Library:

1. In a Media Library, select the folder that you want to upload the files to.
2. To open the **Drag & Drop** dialog box, from the editing pane, on the **Folder** tab, click **Drag & Drop**.



3. Open Windows Explorer and navigate to the folder where the images are stored and select the images you want to upload.
4. Position Windows Explorer next to the **Drag & Drop** dialog box and drag the selected images from Windows Explorer to the **Drag & Drop** dialog box.



Note: *If you need to upload files to or from other locations, you simply navigate through the folder structure either in the **Drag & Drop** dialog box or in Windows Explorer. You do not have to close the dialogs and start over.*

5. When you have dragged and dropped all your media files, click **Done** to copy them to the Media Library.

Note: *If the folder you copy to already contains a media items with the same name, the **Copy File** dialog box opens, asking you to decide how to handle the duplicate media items.*

In the editing pane, on the **Folder** tab and in the **Media** section, you can now see the images that you uploaded and that each new item contains a warning.

6. To remove these warnings, open each media item and enter the alternate text in the **Alt** field.

Edit a media item

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

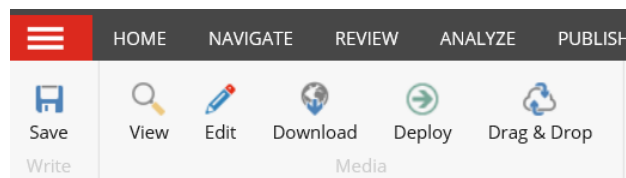
This topic outlines how to:

- [Edit a media item from the Media Library](#)
- [Open and edit an image from the Image Editor](#)
- [Edit an image in the image field](#)

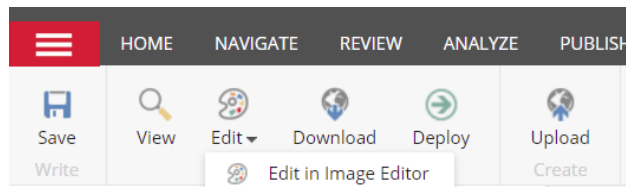
Edit a media item from the Media Library

To edit a media item from the Media Library:

1. In the **Media Library**, navigate to the item that you want to edit.
2. On the **Media** tab, in the **Media** group, click **Edit**. The icon changes depending on the type of media item selected. For example:
 - If the media item is a Word document, you see a pencil as the associated icon. This opens the document in Microsoft Word.



- If the media item is an image, you see an artist's palette. This opens the image in the Sitecore Image Editor by default.




3. For images, you can choose in which application you want to edit the image. Click **Edit** the drop-down arrow and select either:
 - Edit in Image Editor
 - Edit in Local Editor
4. When you have finished editing your media item, save your changes and close the editor.
5. In the Media Library, click **Save**.

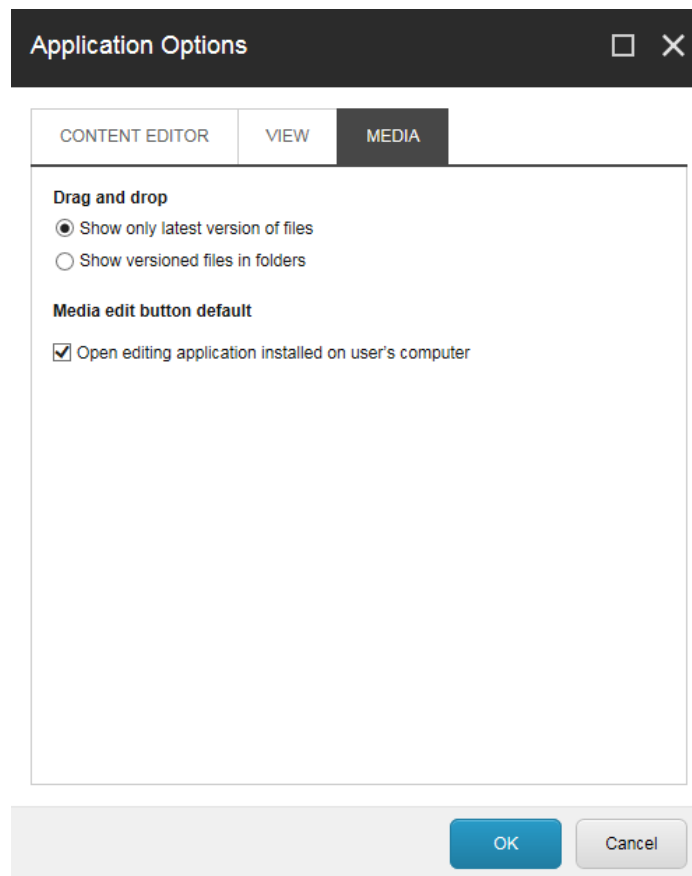
Note: If you edit the media item in a local editor, you must allow Sitecore to overwrite the original media item. In addition, if you have set up automatic versioning of media items, a new version of the media item is created only if you used a local editor.

Change the default image editor

When you edit an image, you can change the default image editor to one on your local machine. In this way, when you click the upper part of the **Edit** button, the image opens up in your local editor instead of the Image Editor.

To change you default image editor:



1. In the Media Library, click the **System menu**  and then click **Application Options**.
2. In the **Application Options** dialog box, click the **Media** tab.



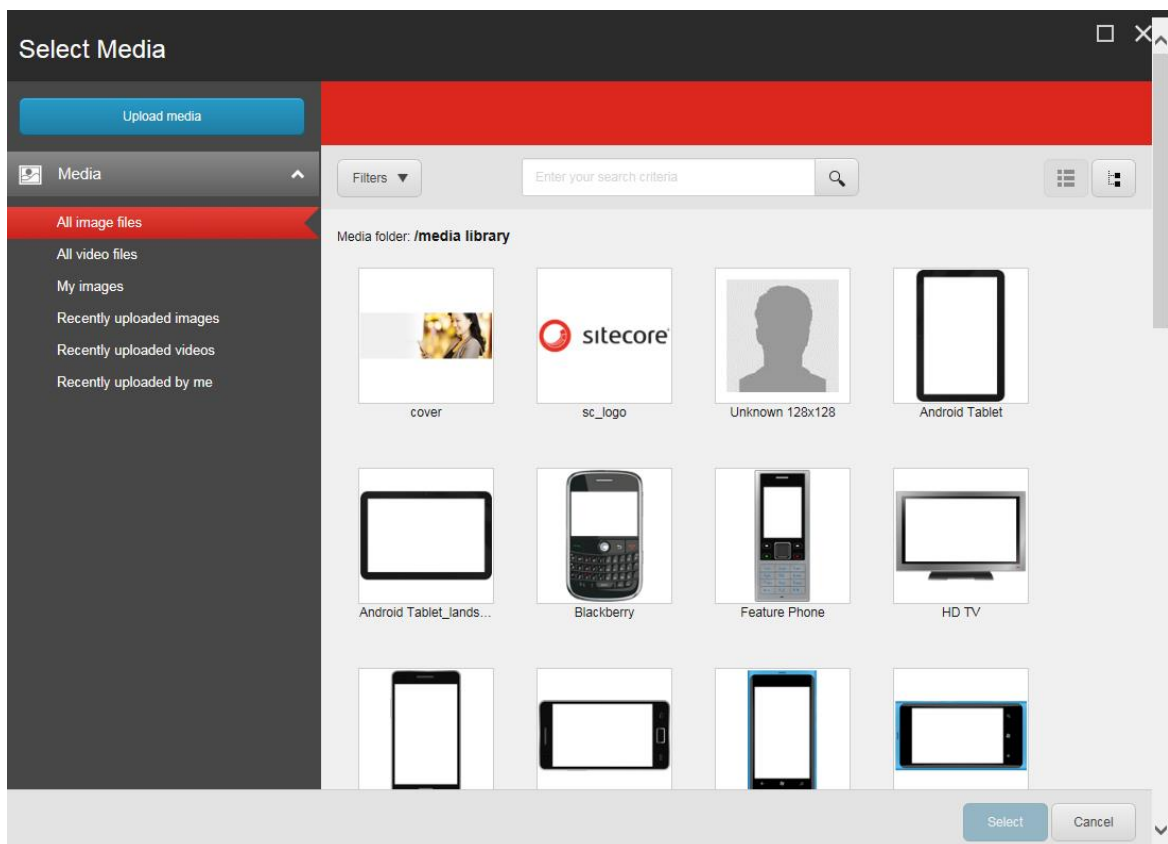
3. In the **Media edit button default** section, select the **Open editing application installed on user's computer** check box and click **OK**.

Open and edit an image from the Image Editor

To open an image for editing in the Image Editor:

1. Click the **Sitecore Launchpad icon**  at the top left of the page.
2. Click **Desktop** .
3. Click the **Begin icon**. .
4. Click **All Applications** and then click **Image Editor**.
5. In the Image Editor, in the ribbon, click **Open**.
6. In the **Select Media** dialog box, select the image that you want to edit and click **Select**.

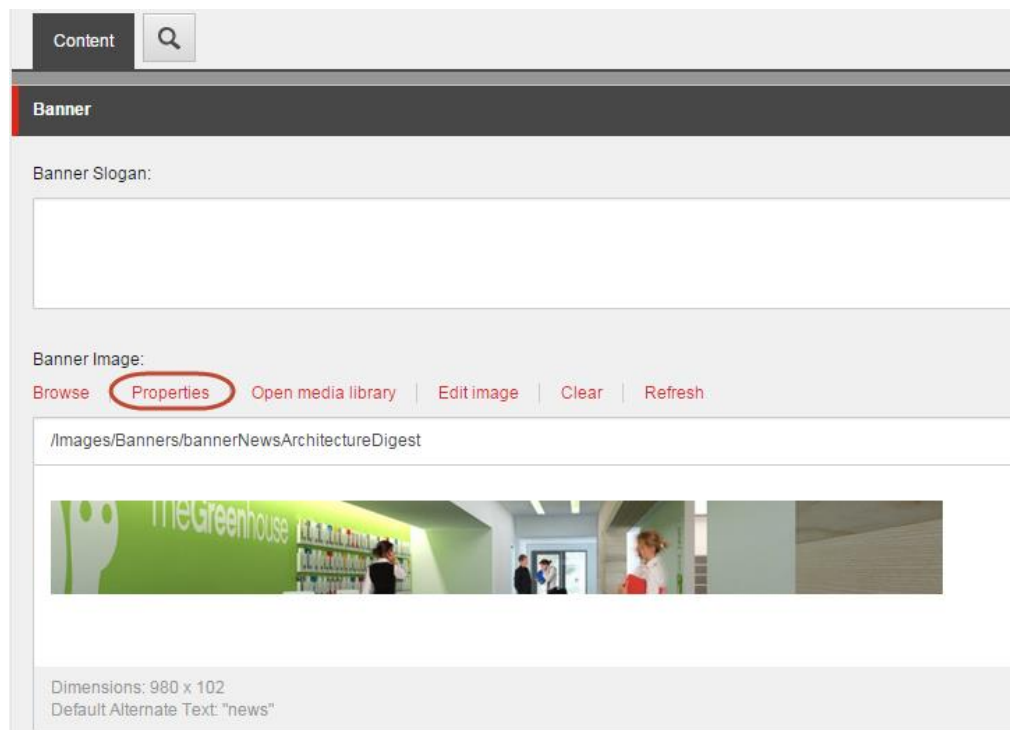
You can find the image that you want to edit in the left menu, or you can use the filters or the search functionality. Alternatively, you can click **Upload media** to upload a new image.



Edit an image in an image field

To edit an image in an image field:

1. In the Content Editor, navigate to the item or page that you want to edit. To edit the image properties:
 - In the Content Editor, on the **Content** tab, scroll to the field that contains the image and click **Properties**.



2. In the **Image Properties** dialog box make the relevant changes to:
 - The **Alternate Text** field - enter the text that you want to appear in the tooltip for the image.
 - The **Dimensions** section - specify the dimensions that the image should be displayed in, if they differ from the actual size of the image.
 - The **Space** section - specify how much space should be placed around the image.

Image Properties

Set the properties for the image here.

Text

Alternate Text:

Default Alternate Text: news

Dimensions

Enter the dimensions of the image if they are different than the dimensions of the original. This will only affect the reference and not the original image.

Width:

Height:

Keep Aspect Ratio

Original Dimensions: 980 x 102

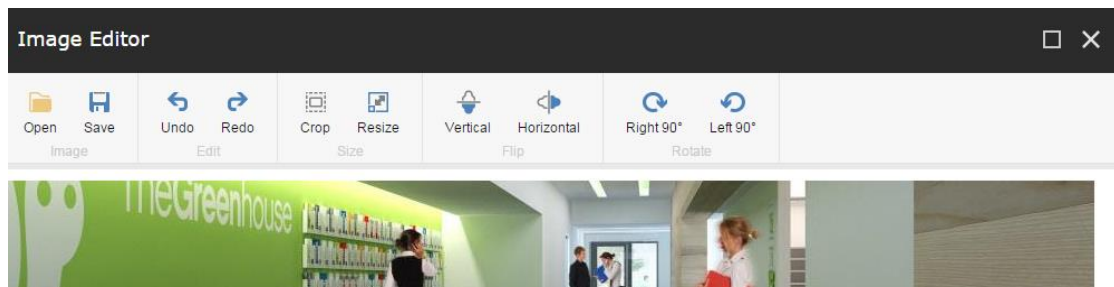
Space

Please provide the desired space to place around the image.

Horizontal Space:

Vertical Space:

- To edit the image itself, you must open the image in the Image Editor, where you can crop, resize, flip, and rotate the image. To open the Image Editor:
 - In the Content Editor, on the **Content** tab, scroll to the field that contains the image and click **Edit image**.



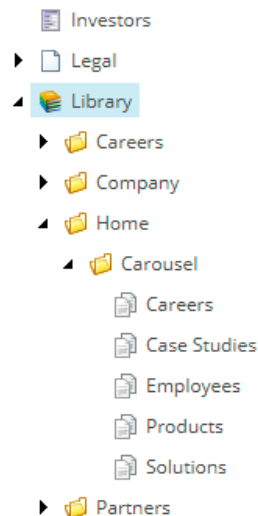
Note: You can also edit the image with any image editor that is available on your local computer.

4. When you have finished with editing the image, save your changes.
5. To see your changes to the image:
 - In the Content Editor, save your changes.

Important: All the changes that you make are applied to the version of the image that is stored in the Media Library and not just the copy that is shown on your web page.

Carousels

Carousels can be placed on several pages and on multiple locations on individual pages, but to edit the carousels you must find them in the **Library** section:

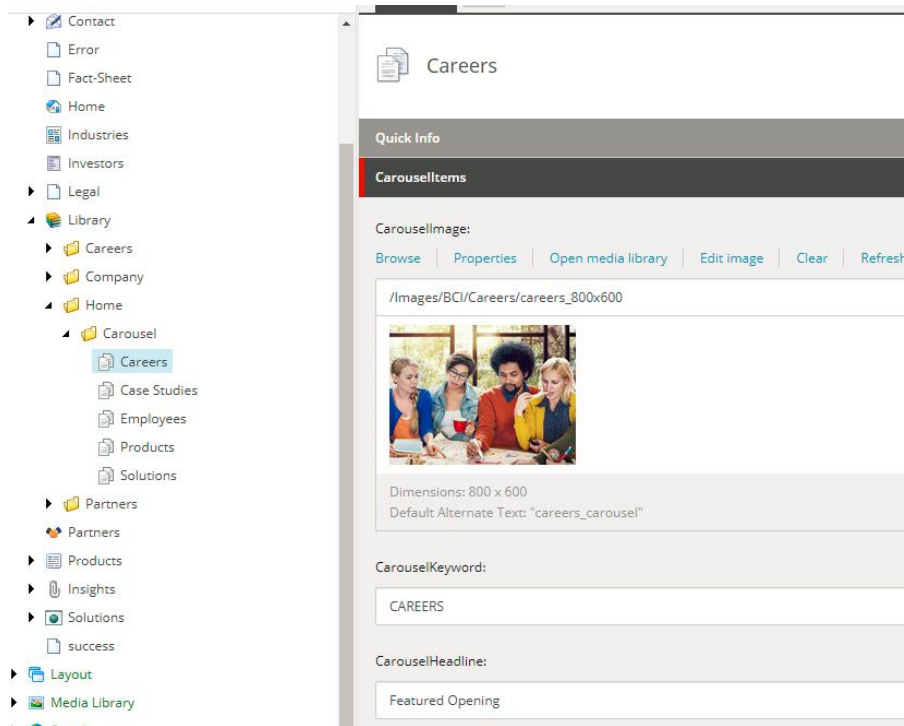


Each carousel lives within a carousel folder named for the page that hosts it.

To edit a carousel:

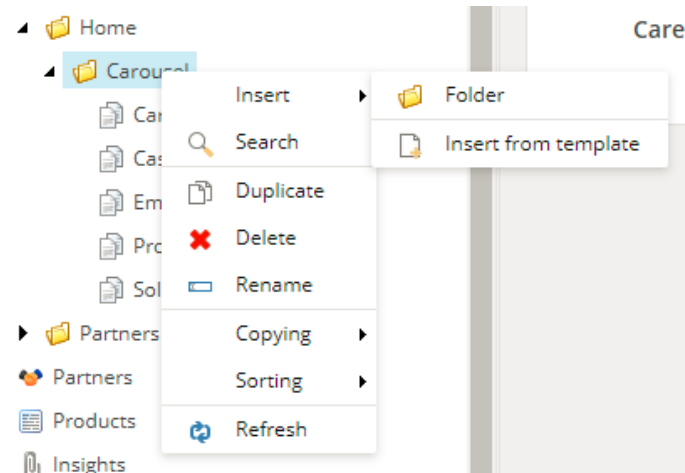
1. Open the specific carousel **page folder** in the **Library** section.
2. Select the **carousel item** and edit the following areas as needed:
 - CarouselImage

- CarouselKeyword
- CarouselHeadline
- CarouselCaption
- CarouselLink

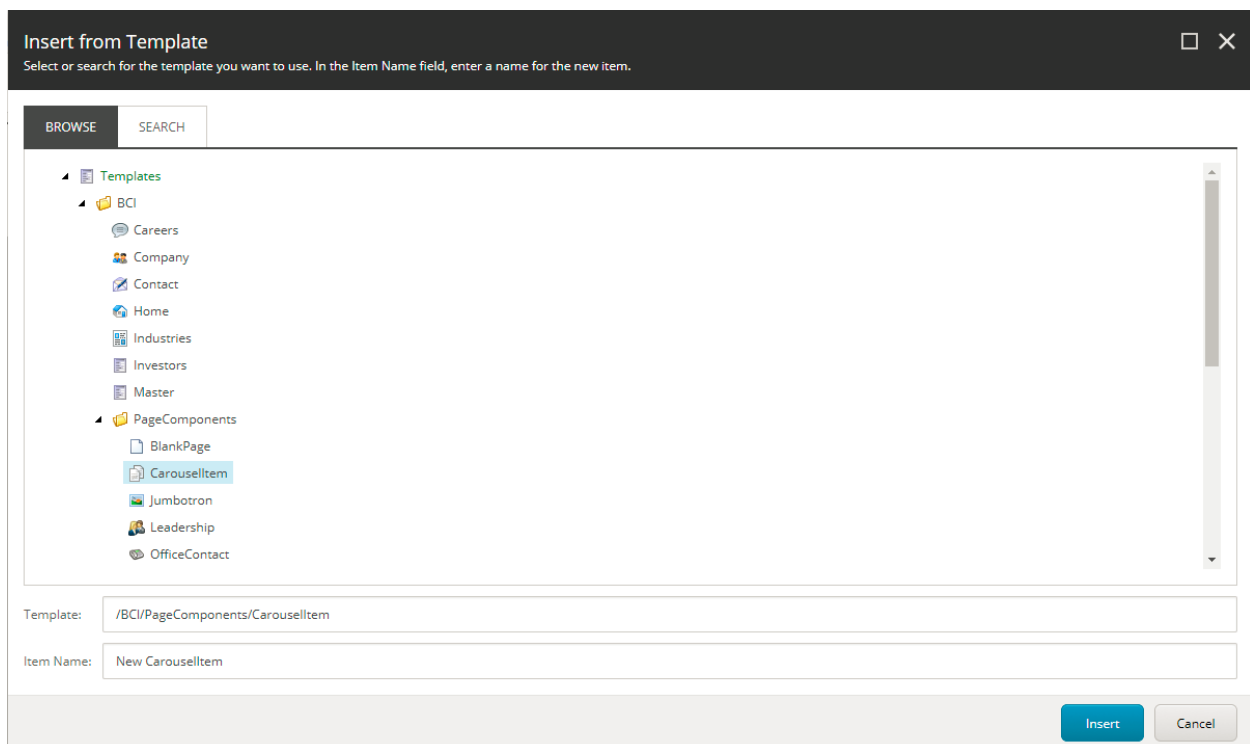


To add a **carousel item** to a carousel:

1. Open the specific carousel **page folder** in the **Library** section.
2. Right-click on the **page folder** and select **Insert from template**.



3. Confirm that **CarouselItem** is highlighted in the **PageComponents** folder. In the **Item Name** field, create a name for your carousel item then select the **Insert** button:



4. Select the **carousel item** and edit the following areas as needed:
 - CarouselImage
 - CarouselKeyword

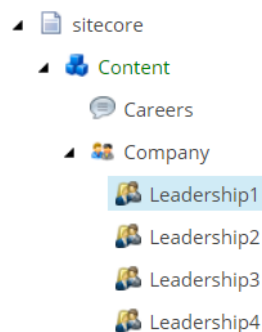
- CarouselHeadline
- CarouselCaption
- CarouselLink

5. Publish the carousel folder when complete.

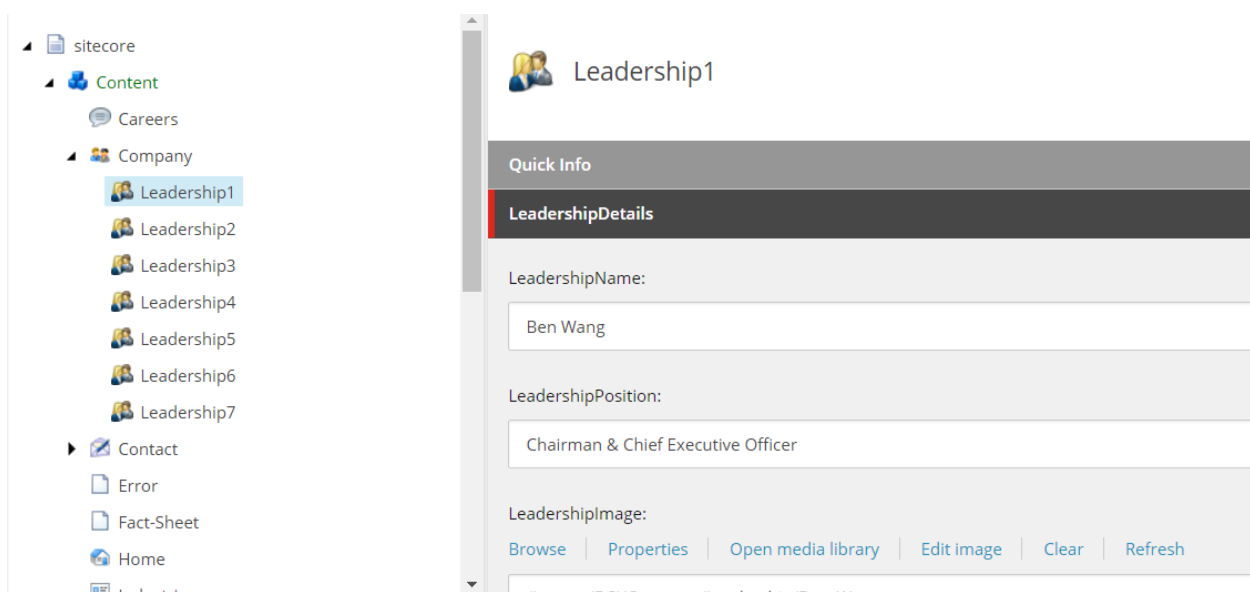
Modals

Modals (also called “pop ups”) are small windows of content that appear when a specific link is selected on a current page.

To edit, find the desired modal in the page on the **content tree**:



Fill out the desired fields as you would a page:



Archive and restore an item

You can archive items that you do not want to display on your website in the Content Editor. When you archive an item, it is not deleted but stored outside the content tree. Archived items can be restored at any time.

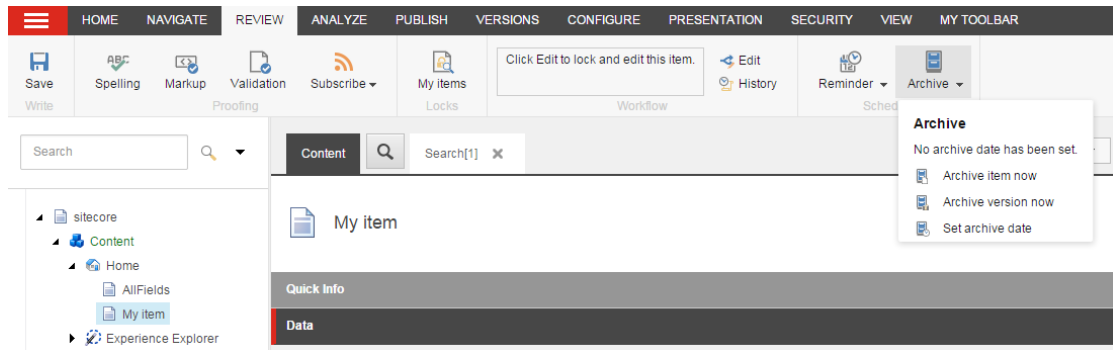
This topic outlines how to:

- [Archive an item immediately](#)
- [Archive an item at a later date](#)
- [Restore an archived item](#)

Archive an item immediately

To archive an item:

1. In the Content Editor, in the content tree, navigate to the item that you want to archive.
 - If you want to archive a version of an item, click the **Versions** button and select the relevant version.
 - If you want to archive an item in a specific language, click the **Language** button and select the relevant language.
2. To archive the item immediately, on the **Review** tab, in the **Schedule** group, click **Archive**:
 - To archive the item in all versions and languages, including all its subitems, click **Archive item now**.
 - To archive the current version and language of the item, click **Archive version now**.



3. Save your changes.

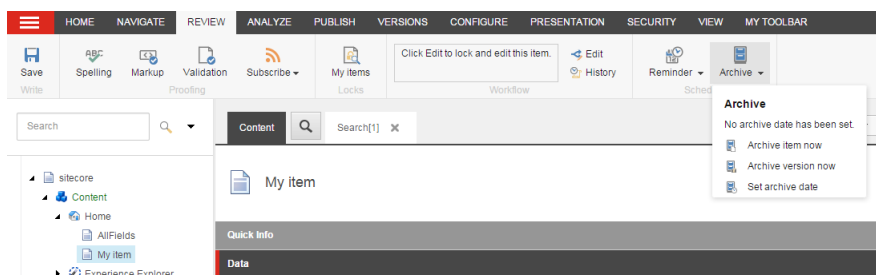
Note: When you archive an item, it is removed from the content tree, but it remains on the published website. Therefore, the best practice would be to:

1. Unpublish the item; then
2. Archive it.

Archive an item at a later date

To archive an item:

1. In the Content Editor, in the content tree, navigate to the item that you want to archive.
 - If you want to archive a version of an item, click the **Versions** button and select the relevant version.
 - If you want to archive an item in a specific language, click the **Language** button and select the relevant language.
2. To schedule the archive of the item on a different date, on the **Review** tab, in the **Schedule** group, click **Archive** and then click **Set archive date**.



3. In the **Archive Date and Time** dialog box, specify the date and time you want to archive the item.
 - In the **Archive item** section, specify the date and time that you want to archive the item including all its versions and subitems.
 - In the **Archive version** section, specify when you want to archive a specific version of the current item.

Set Archive Date □ ×

Specify when you want to archive the item or an item version.

Archive item

Date and time

Archive version


Language	Version	Date and time
en	1	<input type="text"/> <input type="text"/>

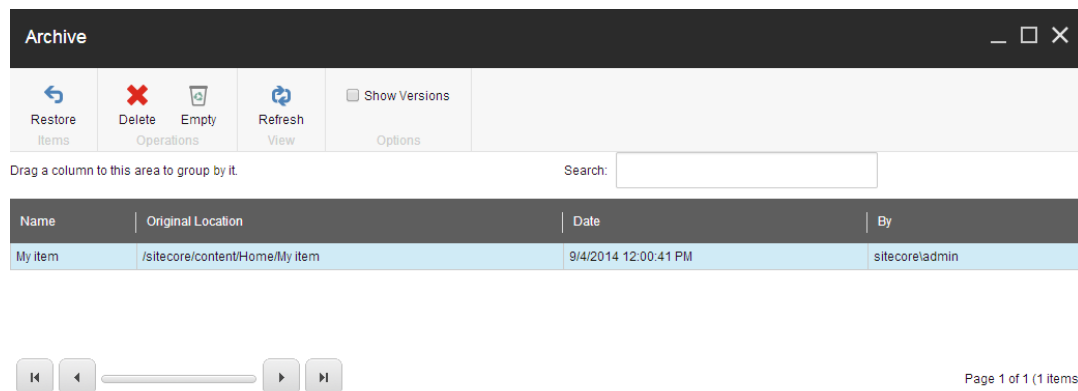
4. When you set a date and time, it is important to remember that:
 - If you only specify a date, the item is archived at 12:00 midnight on that date.
 - If you only specify a time, the item is archived at that time on the current date.
 - If you specify a date or a time that is in the past, the item is archived the next time that Sitecore checks for items to archive.
5. Click **OK** and save your changes.

Note: When you archive an item, it is removed from the content tree, but it remains on the published website. Therefore, you must republish your website to ensure that these changes are replicated on your website.

Restore an archived item

To restore a content item from the archive:

1. In the Sitecore Desktop, click the **Sitecore Start** button , **All Applications**, and then click **Archive**.
2. In the Archive dialog box, select the item that you want to restore.
 - To restore all versions and languages of an item, including the subitems, select the item from the list. You can only restore one item at a time.



- To restore a version of an item, in the **Options** group, select **Show Versions**, click the item that contains the version that you want to restore and in the lower pane that appears, select one or more versions to restore.

The screenshot shows the Sitecore Archive interface. At the top, there are navigation buttons: Restore (Items), Delete (Operations), Empty (Operations), Refresh (View), and Show Versions (Options). Below these is a search bar and a prompt to drag a column to group by it. The main table displays item details:

Name	Original Location	Date	By
My item	/sitecore/content/Home/My item	9/4/2014 12:00:41 PM	sitecore\admin

Below the table is a pagination control showing "Page 1 of 1 (1 Items)". At the bottom, there is a detailed table of versions:

Language	Version	Date	By
da	1	9/4/2014 12:00:41 PM	sitecore\admin
da	2	9/4/2014 12:00:41 PM	sitecore\admin
en	1	9/4/2014 12:00:41 PM	sitecore\admin
en	2	9/4/2014 12:00:41 PM	sitecore\admin
da	1	9/4/2014 12:00:41 PM	sitecore\admin
da	2	9/4/2014 12:00:41 PM	sitecore\admin
en	1	9/4/2014 12:00:41 PM	sitecore\admin
en	2	9/4/2014 12:00:41 PM	sitecore\admin

Note: You can select and restore as many versions of the same item as you want.

3. In the **Items** group, click **Restore** and the items are restored in the content tree.

Restore or remove a deleted item

When you delete an item, the item is moved to the Sitecore Recycle Bin from where you can:

- Restore an item or a version of the item.
- Permanently delete individual items.
- Empty the entire bin and permanently delete all items.

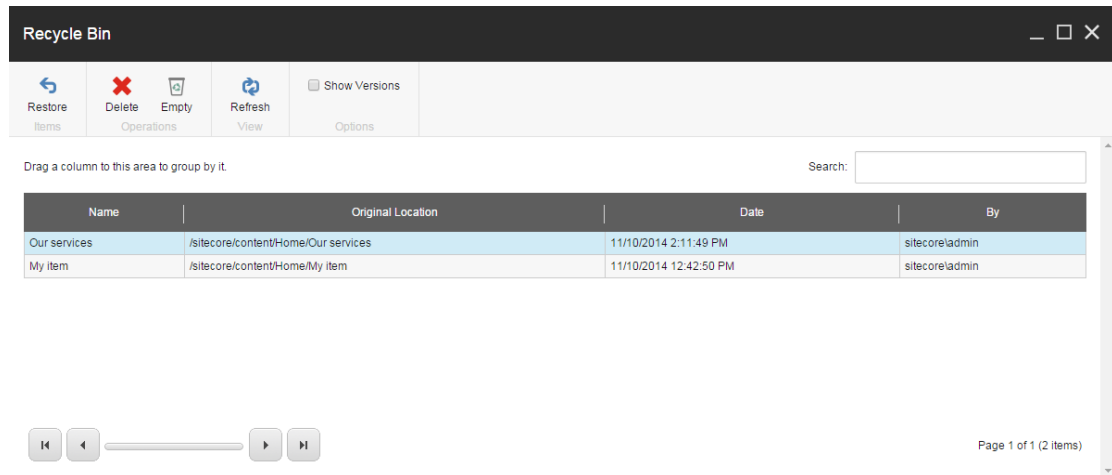
To restore or remove an item from the Sitecore Recycle Bin:

1. Open the Sitecore Launch Pad and click **Recycle Bin**.

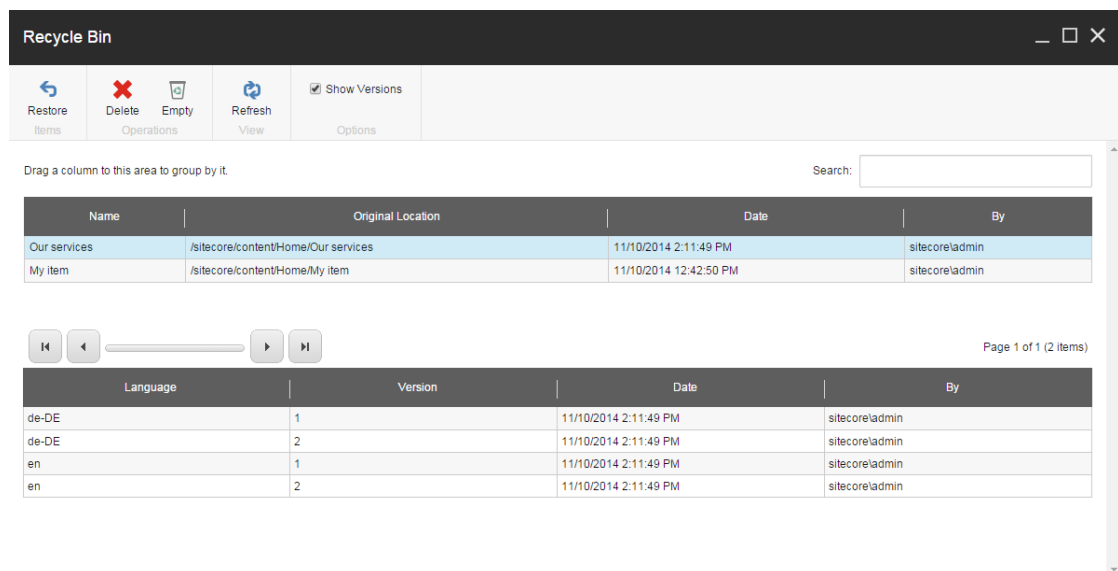
Alternatively, you can open the Recycle Bin from the Sitecore Start menu.

2. In the **Recycle Bin** dialog box:

- To restore a single item, select the item in the list and click **Restore**.



- To restore a version of the item, in the **Options** group, select the **Show Versions** check box to display all the deleted versions of the selected item. Then from the list of versions, select the version that you want to restore and click **Restore**.



Note: When you restore an item or a version of an item, it is restored to its original place in the content tree.


- To permanently delete an individual item, select the item that you want to delete and in the **Operations** group, click **Delete**.
 - To empty and permanently delete the entire recycle bin, in the **Operations** group, click **Empty**.
3. Click **OK**.

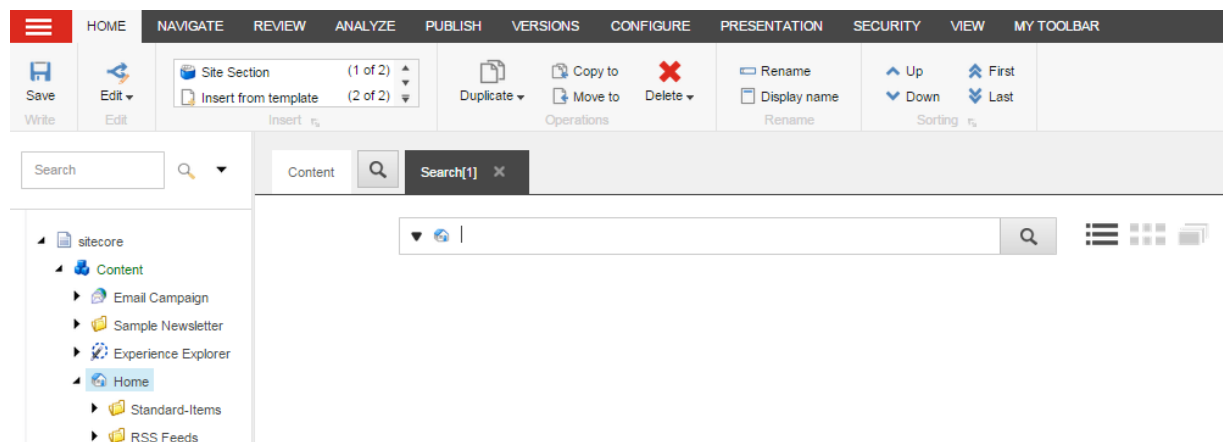
Search

The search engine in Sitecore lets you quickly search through all your items in the content tree. To help you locate exactly the item you are looking for, you can use the advanced search functionality, such as search filters and facets.

Note: *The search does not include your archived items.*

You can access the Sitecore search engine from every item in the content tree in the Content Editor. In the Content Editor, there is a **Search** tab next to the content tab of every item. Item buckets open directly on the **Search** tab because you need the search functionality to find and open hidden items in an item bucket.

To run a search on an item in the content tree, in the content area, click **Search**  and, in the new **Search** tab, enter your search criteria. The search runs through the selected item only.



If you want to run more than one search from the same item, you just open a new **Search** tab. You can open as many search tabs as you want. Each **Search** tab has a time stamp that gives you a reference to each specific search, for example, if you want to save a search.

The search interface

You also have the option to build a query, to view, and to filter the search results.

The screenshot displays the Sitecore search interface. At the top, there is a search bar with the text "Search[1]" and a magnifying glass icon. Below the search bar, there are several annotations: "The search field" points to the search bar itself; "More search options" points to a dropdown menu on the left; "View types" points to icons on the right; and "Facets" points to a sidebar on the right. The search results are listed below the search bar, showing 131 results. The results include items like "Home", "Case-Studies", "Contact-Us(2)", "Services", and "Standard-Items". A red arrow points to the "(2)" in "Contact-Us(2)" with the label "The number of languages that the item is available in". The "Facets" sidebar on the right shows a list of templates and their counts, such as "about us description" (6), "adcampaign" (1), "case study section" (1), "client description" (4), "contact category" (4), "contact location" (14), "contact section" (1), "copyright" (1), "folder" (12), "inspiration description" (4), "news article" (11), "news section" (1), "partner description" (2), "partner section" (1), "process description" (4), "process section" (1), "register form settings" (3), "rss feed" (2), and "service description" (20).

Search field


In the **Search** field, you enter the search query for your search. You can enter either free text, use the predefined search filters, or a combination of both. You can access the search options from the drop-down menu.

More search options

If you click the drop-down arrow to the left of the search field, you open a list of pre-defined search options that you can use to optimize and speed up your search. You can, for example, open an item from a list of the most recently modified or opened items, select one of the pre-defined search filters, or apply one of the search operations to all the items returned by the search.

Note: *The administrator sets up the search engine and determines, for example, which search views and facets are available to you and whether or not you are able to see media items in the search results.*

View types

The different views of the search results are available to the right of the search field. The default views are *List View*, *Grid View*, and *Image View* . If necessary, your administrator can activate several other views such as *Tag View* or *Table View*.

Note: *If you change the view, the search is launched again, based only on the keywords and filters in the Search field.*

Facets

A facet is a way of categorizing the items returned by a search. For example, the items can be classified by author, language, or by when they were created. Once you have a list of search results, you can use the facets to filter the results further.

Search results

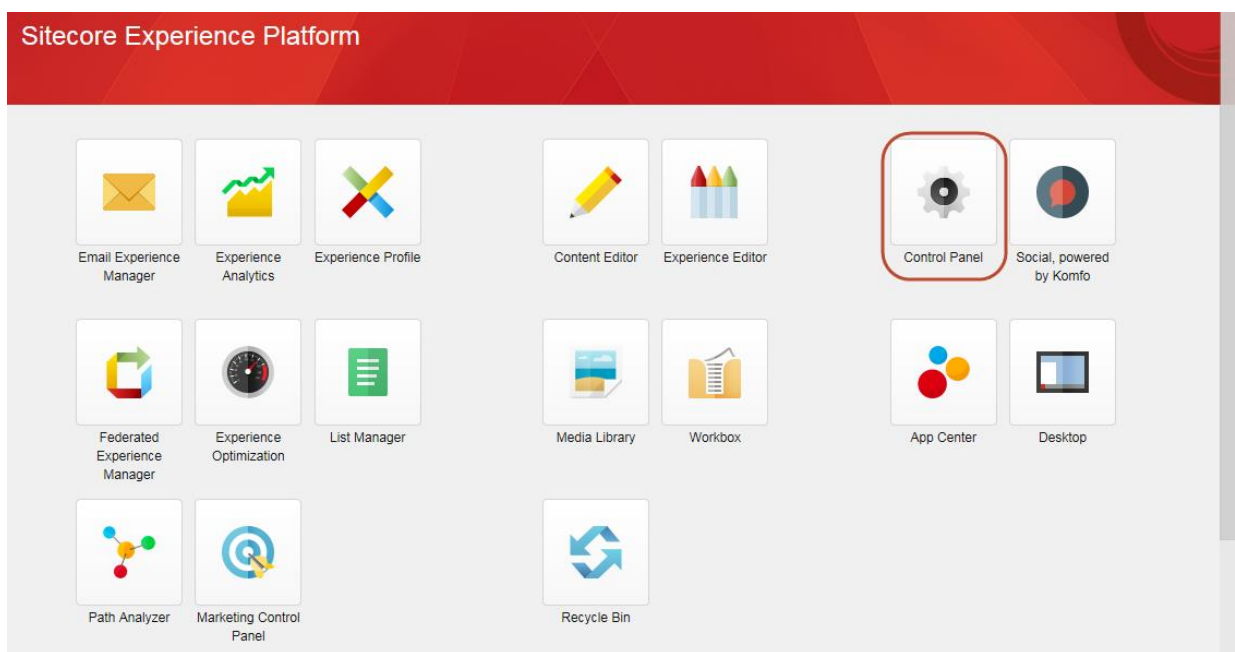
When you run a search, the results are listed below the search field. The search results contain basic information about the items returned, such as title, template, and version to give you a quick overview. From the list of search results, you can click an item to open it in the Content Editor.

Change your personal settings

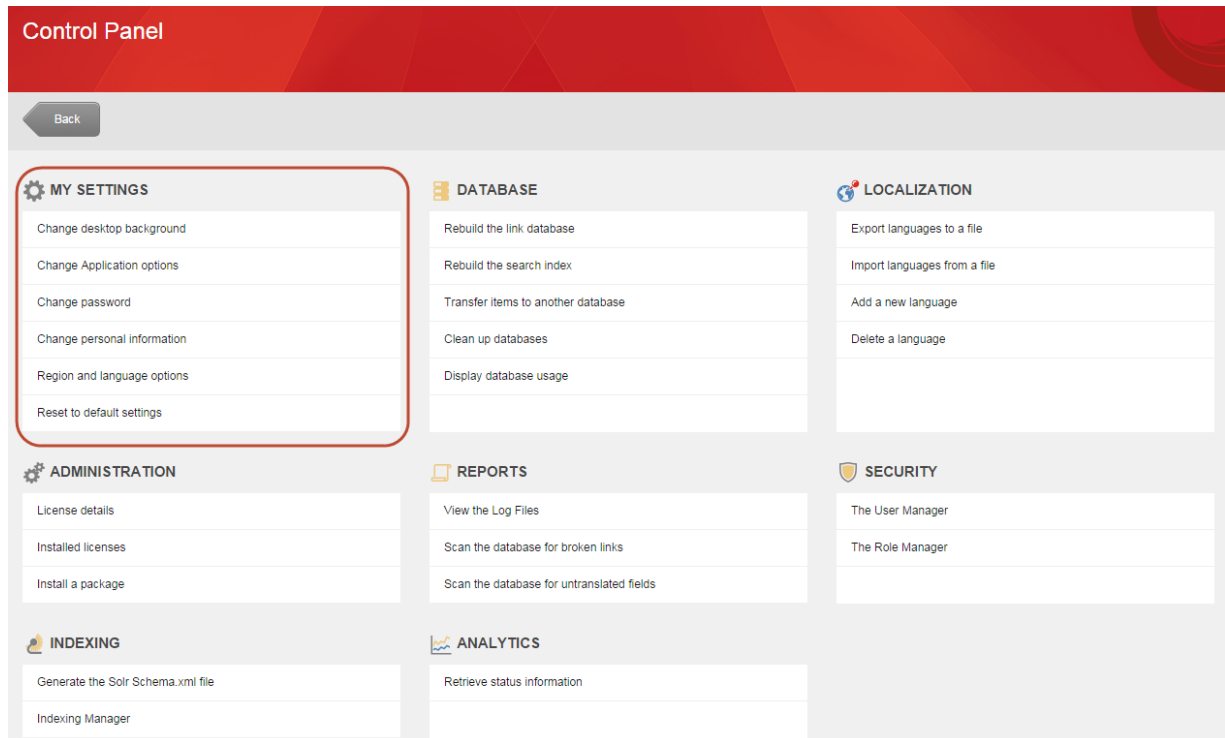
In the Sitecore Control Panel, you can set up your personal settings, for example your password or the region and language options, to make the application suit your needs.

To change your personal settings:

1. On the Sitecore Launchpad, click the **Control Panel**.



2. In the Control Panel, in the **My settings section**, you can change the following settings:



- **Change desktop background** – in the Background field, select the image that you want to use, specify the position of the image and the color that you want to surround the image if it does not fill the screen.
- **Change Application options** – in the Application Options dialog box, on the Content Editor tab, specify which elements you want to display on the Content Editor. On the View tab, you can customize the content tree.
- **Change password** – in the Change Password dialog box, enter your current password and then enter and confirm your new password.
- **Change personal information** – in the Personal Information dialog box, you can change your name, email address, and the image that you use as your portrait throughout Sitecore.
- **Region and language options** – in the Regional and Language Settings dialog box, you can specify the formats that you want to use for numbers, currencies, times, and dates. In addition, you can specify the language that you want the client application to use.

- **Reset to default settings** – click to reset all your personal settings to the default settings.
3. When you have finished setting up your personal information, click **Back** to return to the Launchpad.

BCI.com Publishing Guidelines

The following guidelines and best practices will help with specific BCI.com pages to keep the style consistent. These instructions can be adapted as the site grows, but the basic style and formatting rules should be kept as close to the original information as possible.

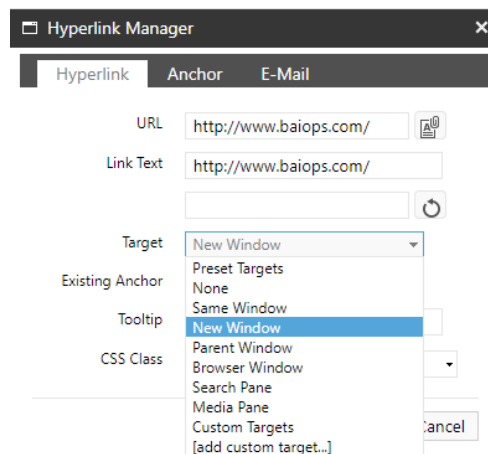
All pages: External links

All external links should open in a new tab:

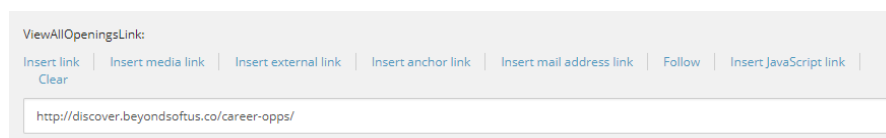
- Rich Text Editor
 1. Highlight the text to link and select **Hyperlink Manager** from the ribbon:



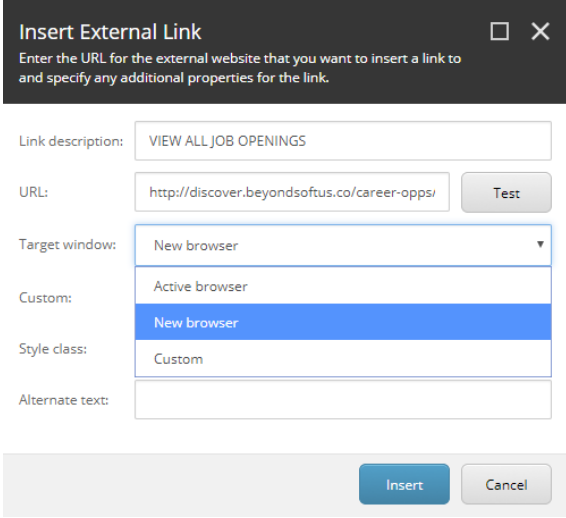
2. In the Hyperlink manager, insert the URL and select **New Window** from the **Target** drop down menu:



- Content editor
 1. Select **Insert external link**:



2. Insert Link description, URL and select **New browser** from the **Target** window drop down menu, then click on the **Insert** button:



Insert External Link □ ×

Enter the URL for the external website that you want to insert a link to and specify any additional properties for the link.

Link description:

URL:

Target window:

Custom:

Style class:

Alternate text:

All pages: Images

- Sizes
 - Unless otherwise noted, all images should have a 4:3 aspect ratio and sized at 800x600 pixels.
- Images with text overlay
 - Images that include text as an overlay should avoid white-to-bright colors. Most overlay text is white, and some subhead text is teal. In order to increase readability, white or any colors that lean toward the bright spectrum should be avoided.

All pages: Naming convention

Adhering to the suggested SEO naming form will not only provide higher search results but create consistency throughout the site. The following rules should be followed when naming folders, items, and subitems:

- Folders, items, and files in the Media Library that are already published should never be renamed. This could cause links to break. If renaming is necessary, follow the [unpublishing](#) rules.
- Spaces should never appear
 - Spaces are not recognized in search engines, so use hyphens between words.
- Hyphens not underscore
 - Per SEO suggestions, hyphens are used as word separators while underscores do not specify any function in search parameters.
- No upper case letters
 - Capital letters do not impact rankings. For consistency, avoid using upper case letters in URLs.
- Dates
- Blogs, news articles, and any other page or download that is related to a specific date should have the date entered at the end of the URL in DDMMYY format. EXAMPLES:

blog-beyondsoft-calendar-081717
case-study-cloud-dev-test-cloud
datasheet-martech-110917

Note: No date needed for case studies, as they aren't date-specific.

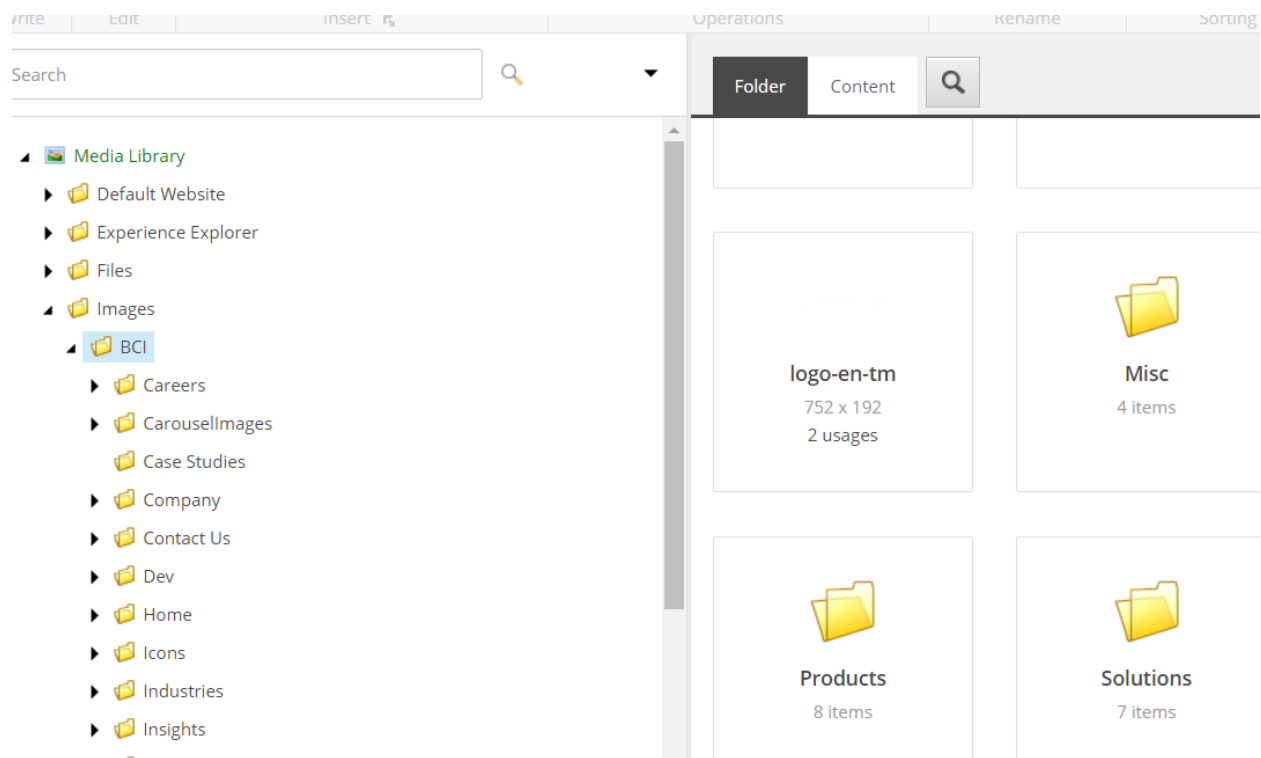
Navigation bar and footer

The navigation bar and footer can be edited on the Home page, under the Navbar and Footer sections, respectively.

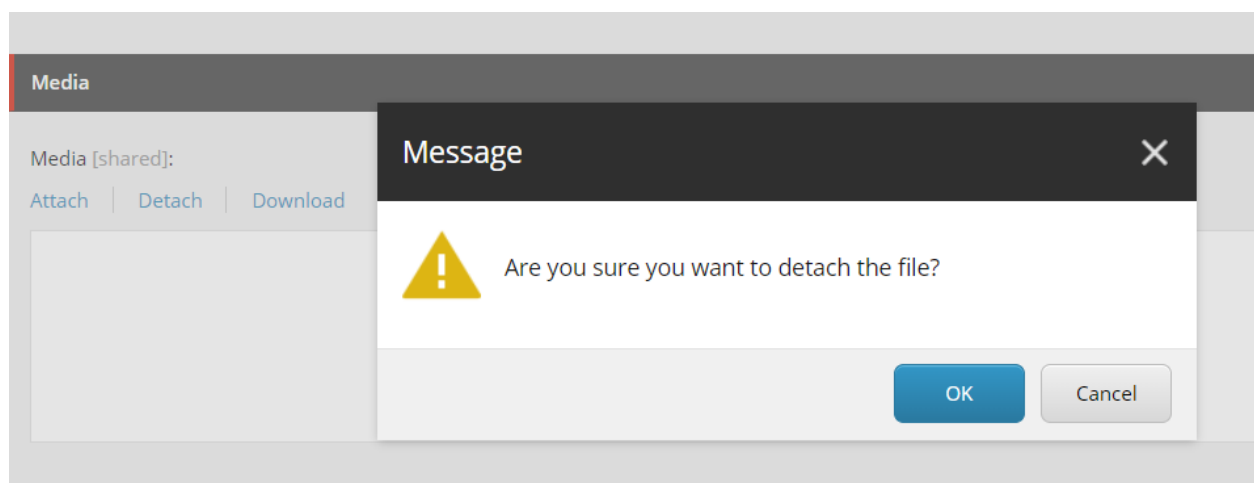
Beyondsoft logo

If the Beyondsoft logo needs to be updated and replaced at any time, the following steps should be followed:

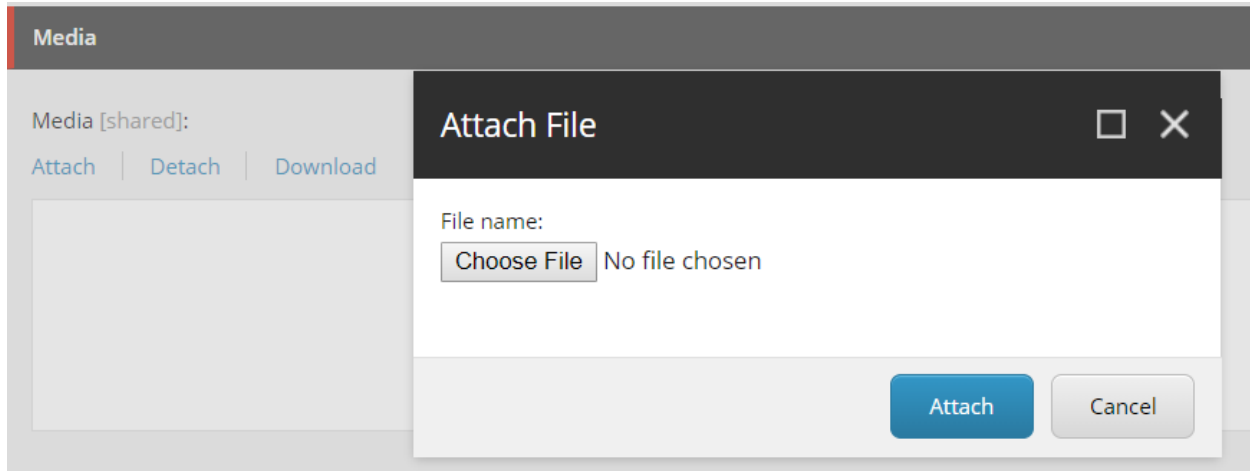
1. Go to the **Media Library** and select the BCI folder. Locate the **logo-en-tm** file and select it:



2. Once the file is selected, scroll down to the Media section and select **Detach**. A dialog box will ask if you are sure you want to detach the file. Selecting the OK button unlocks the current image from the logo:



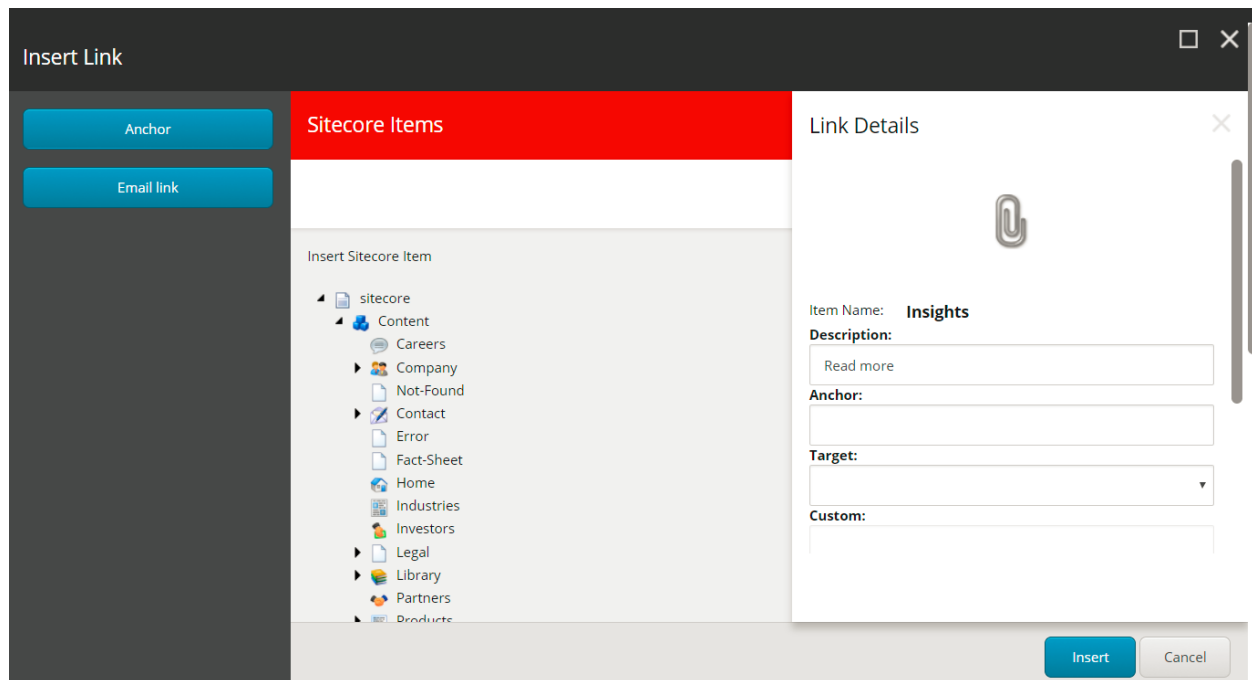
3. To add a new image to the logo, select **Attach** and choose the file from the location on your local drive:



4. When the file is uploaded, save and publish the image file from the Media Library.

Home Page

- Carousel
 - Images should be 800x600 pixels.
 - Copy should be no more than 75 words and be tested to see if the size of the font or amount of words affects the carousel size.
- News block (RelatedContent section)
 - EventHeadline:
 - Copy should be no more than 15 words and be tested to see if the size of the font or amount of words affects the box size.
 - EventImage
 - Image should be 800x600 pixels.
 - EventLink:
 1. Click on Insert link and navigate to the item
 2. Type "Read more" or "Learn more" in the Link Details box
 3. Select the Insert button



- NewsKeyword:
 - Insert “NEWS”

- NewsHeadline:
 - Copy should be no more than 10 words and be tested to see if the size of the font or amount of words affects the box size.

- NewsLink:
 1. Click on Insert link and navigate to the item
 2. Type “Read more” or “Learn more” in the Link Details box
 3. Select the Insert button

- CareersKeyword:
 - Insert “CAREERS”

- CareersHeadline:
 - Default copy: “Join our team”
 - Copy should be no more than 10 words and be tested to see if the size of the font or amount of words affects the box size.

- CareersBGImage
 - Image should be 800x600 pixels.
- CareersLink:
 1. Click on Insert link and navigate to the item
 2. Type “Read more” or “Learn more” in the Link Details box
 3. Select the Insert button

Solutions

- Case study image and copy
 - Image should be 400x200 pixels.
 - Copy should be no more than 10 words.

Solutions details pages

- Services images should be 800x600 pixels.

Industries

- Tiles
 - Images should be 800x600 pixels.
 - See [modals](#) section for content instructions.

Company

- Leadership
 - Images should be 170x170 pixels.
 - See [modals](#) section for content instructions.
- Awards and Certifications carousel
 - Images should be no more than 300 pixels wide and no more than 110 pixels tall.
 - See [carousels](#) section for content instructions.

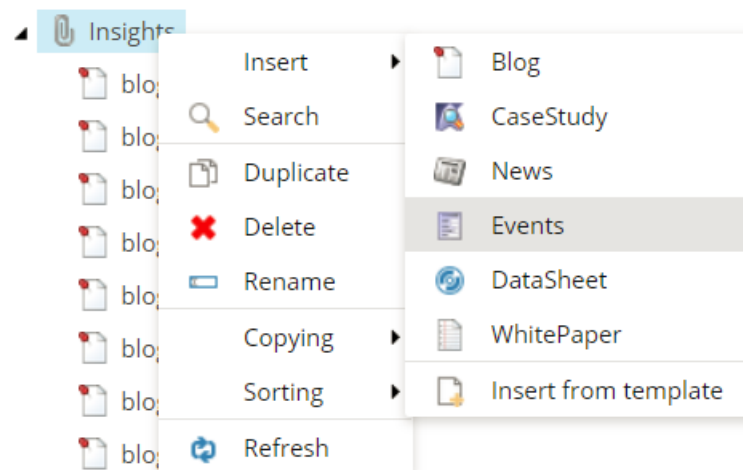
- Beyondsoft Family carousel
 - Images should be no more than 310 pixels wide and no more than 200 pixels tall.
 - See [carousels](#) section for content instructions.

Insights

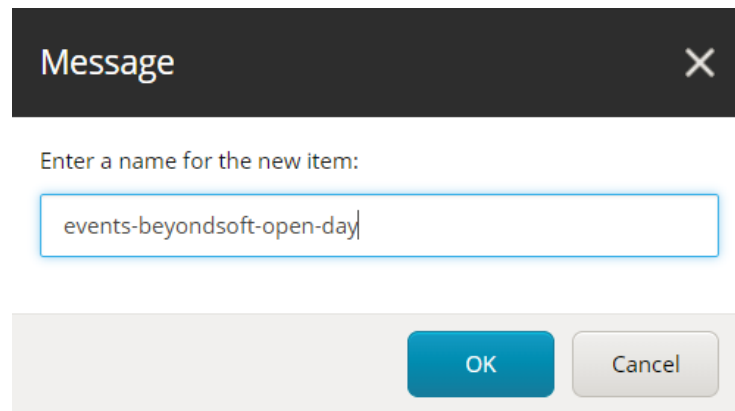
Events

To enter events content:

1. Right click on the **Insights** folder select **Insert** then select **Events**:

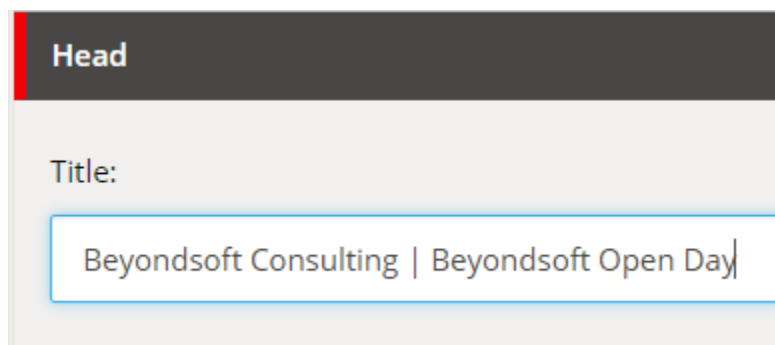


2. In the Message dialog box that appears, [use the naming convention style from above](#) to enter a name and date for the event:



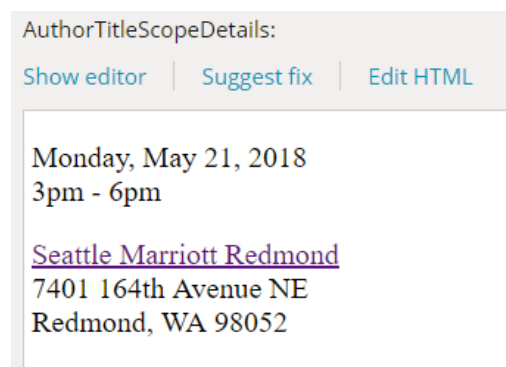
A dark grey dialog box titled "Message" with a close button (X) in the top right corner. Below the title bar, the text "Enter a name for the new item:" is displayed. A text input field contains the text "events-beyondsoft-open-day". At the bottom of the dialog, there are two buttons: a blue "OK" button and a grey "Cancel" button.

3. In **Head** section of the page, enter "Beyondsoft Consulting |" followed by the title of the event in the **Title** box:



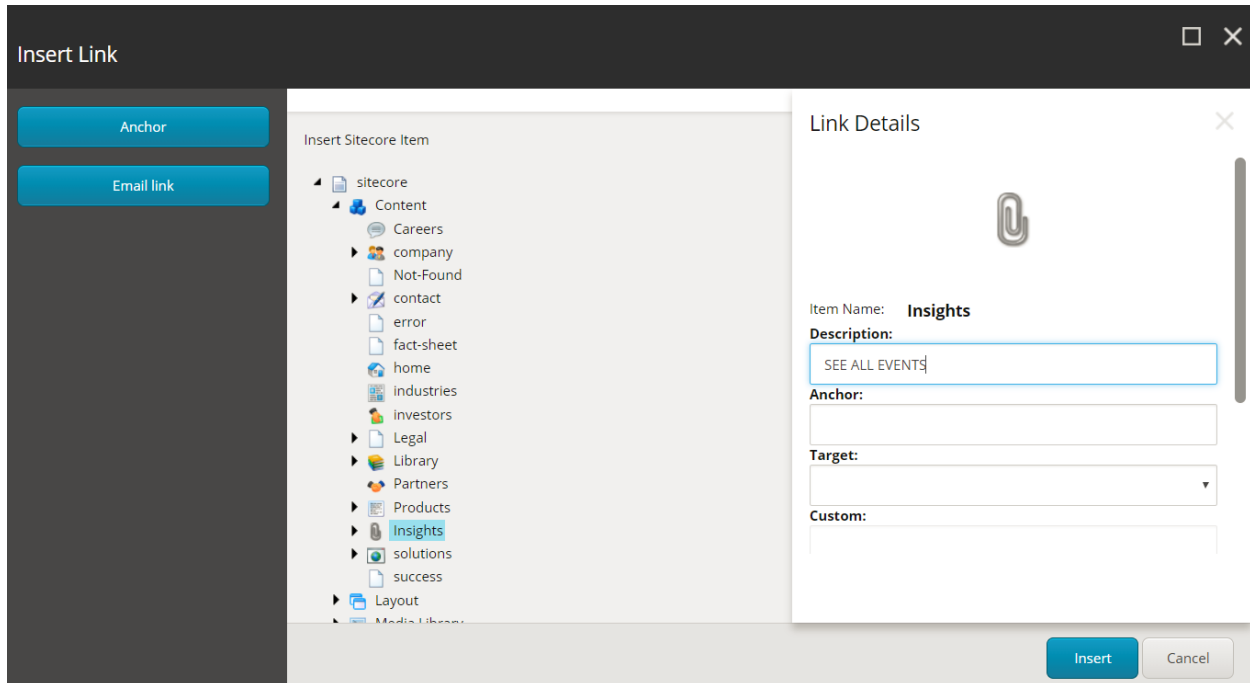
A form titled "Head" with a red vertical bar on the left side. Below the title, the label "Title:" is followed by a text input field containing the text "Beyondsoft Consulting | Beyondsoft Open Day".

4. Enter event details in the **AuthorTitleScopeDetails** box by selecting **Show editor** and entering content in the rich text editor:

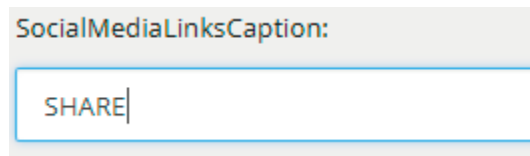


A form titled "AuthorTitleScopeDetails:" with three links: "Show editor", "Suggest fix", and "Edit HTML". Below the links, the text "Monday, May 21, 2018" and "3pm - 6pm" is displayed. Below that, the text "Seattle Marriott Redmond" is underlined and blue, followed by "7401 164th Avenue NE" and "Redmond, WA 98052".

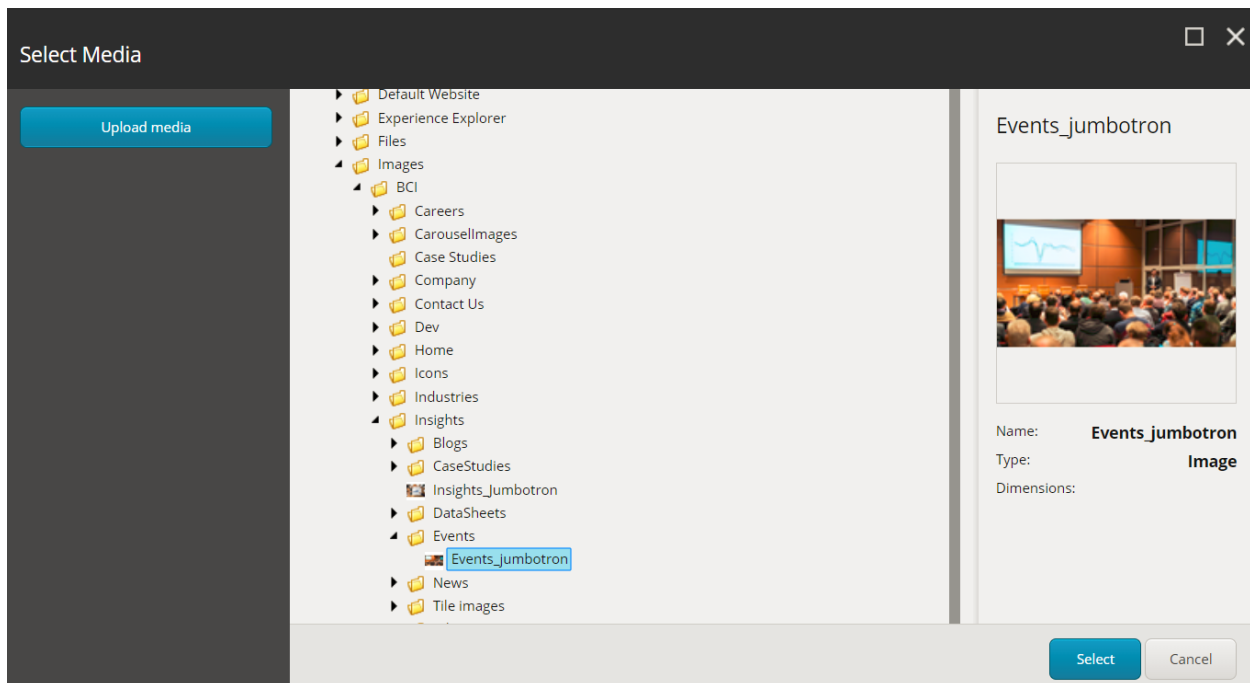
5. In the **Backlink** section, select **Insert link** then select Content>Insights. In the **Description** box, enter "SEE ALL EVENTS" then select the **Insert** button:



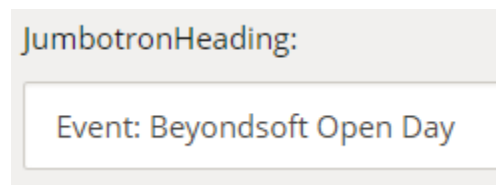
6. In the SocialMediaLinksCaption box, enter "SHARE:"



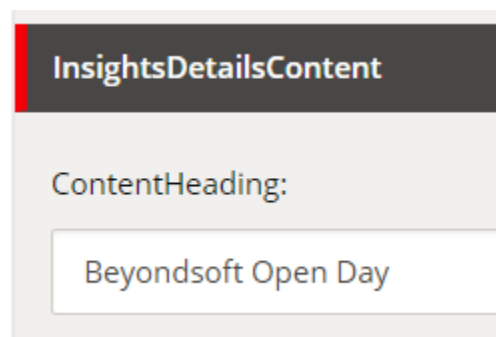
7. In the **JumbotronImage** section, select **Browse**, then find the case study image in the Insights/Events folder in the Media Library and click on the **Select** button:



8. Enter "Event:" and the related title in the **JumbotronHeading** box:



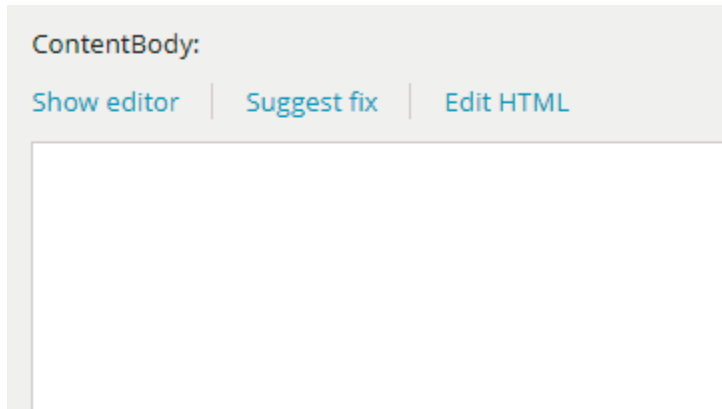
9. In the **InsightsDetailsContent** section, in the **ContentHeading** box, enter the title of the event:



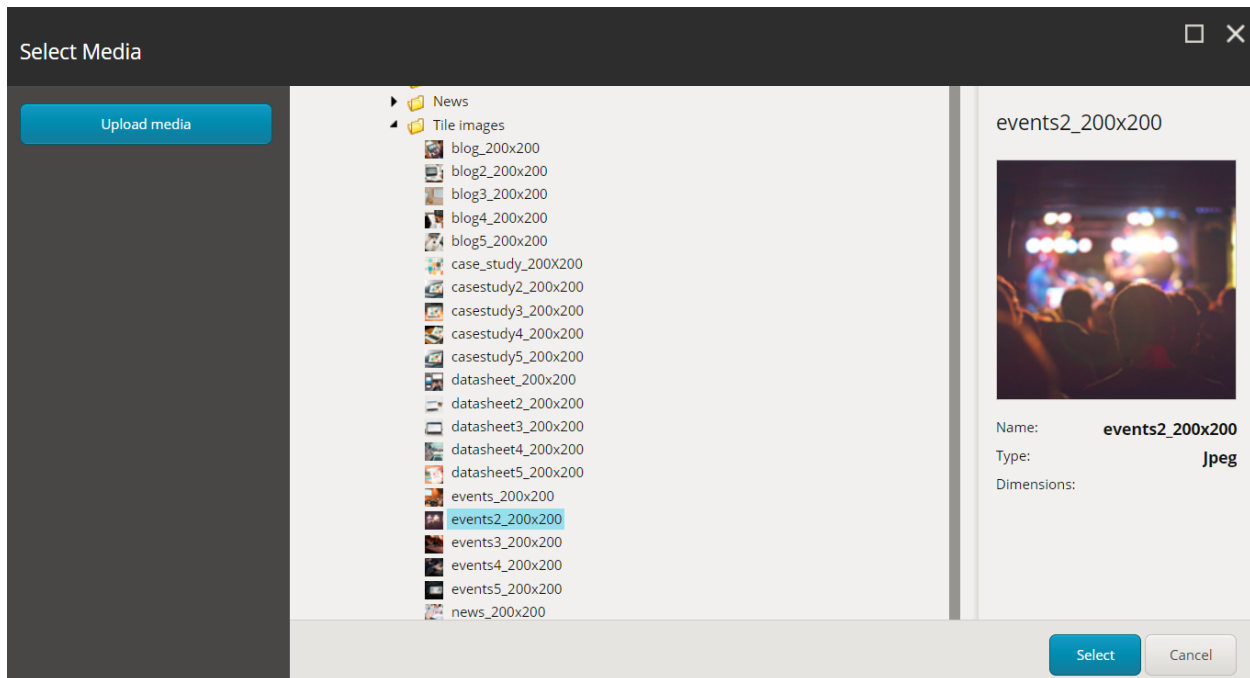
10. Enter the copy for the event in the **ContentBody** by selecting **Show editor** and typing in the rich text editor box:

Note: *If copying and pasting from an external source, the best practice for results is to paste the content into Notepad, then copying and pasting from Notepad to the rich text editor.*

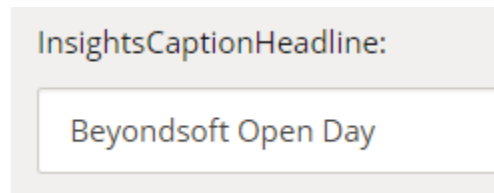
For consistency purposes, DO NOT update the size or class of the font. This could cause sizing issues, when viewing from mobile devices.



11. When content entry and formatting is completed, select **Accept**.
12. In the **InsightsSearchResultContent** section, under **InsightsCaptionImage**, select **Browse** and navigate to the **Media Library** to the **Images>Insights folder**. Expand the folder and in the **Tile images** sub folder, choose a 200x200 image that is associated with the event:



13. Add a headline in the **InsightsCaptionHeadline** text box:

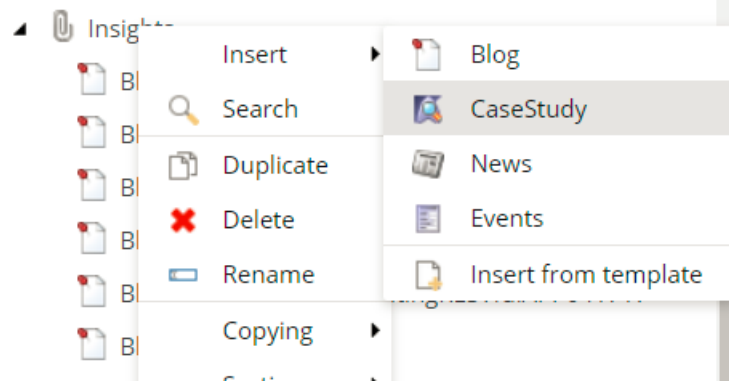


14. Save and preview the page before publishing.

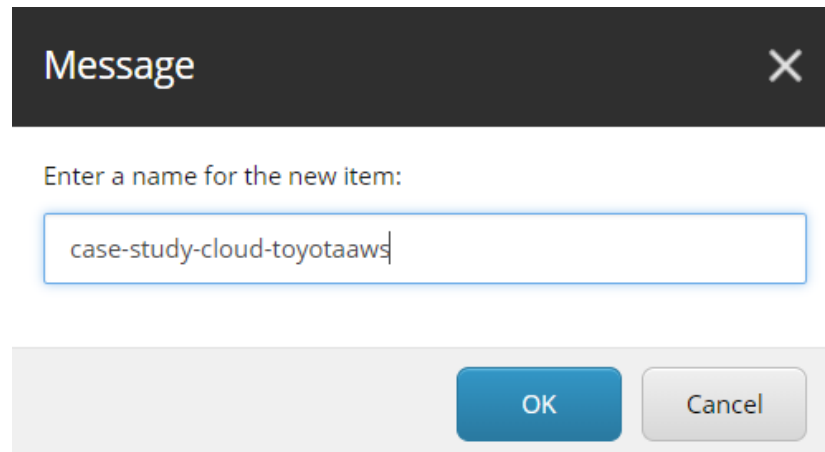
Case studies

To enter case study content:

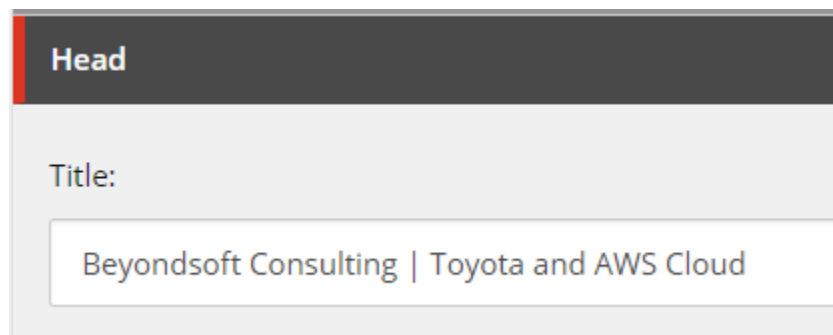
1. Right click on the **Insights** folder select **Insert** then select **CaseStudy**:



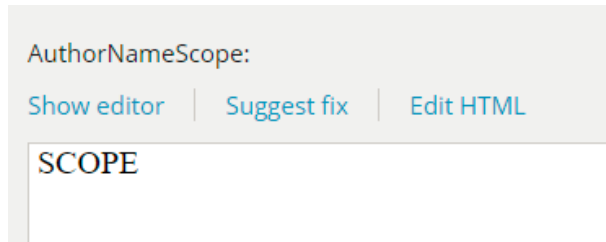
2. In the Message dialog box that appears, [use the naming convention style from above](#) to enter a name and date for the case study:



3. In **Head** section of the page, enter "Beyondsoft Consulting |" followed by the title of the case study in the **Title** box:



- In the **InsightsDetails** section enter "SCOPE" in the **AuthorNameScope** box by selecting **Show editor** and entering content in the rich text editor:



AuthorNameScope:

Show editor | Suggest fix | Edit HTML

SCOPE

- Enter scope details in the **AuthorTitleScopeDetails** box by selecting **Show editor** and entering content in the rich text editor:

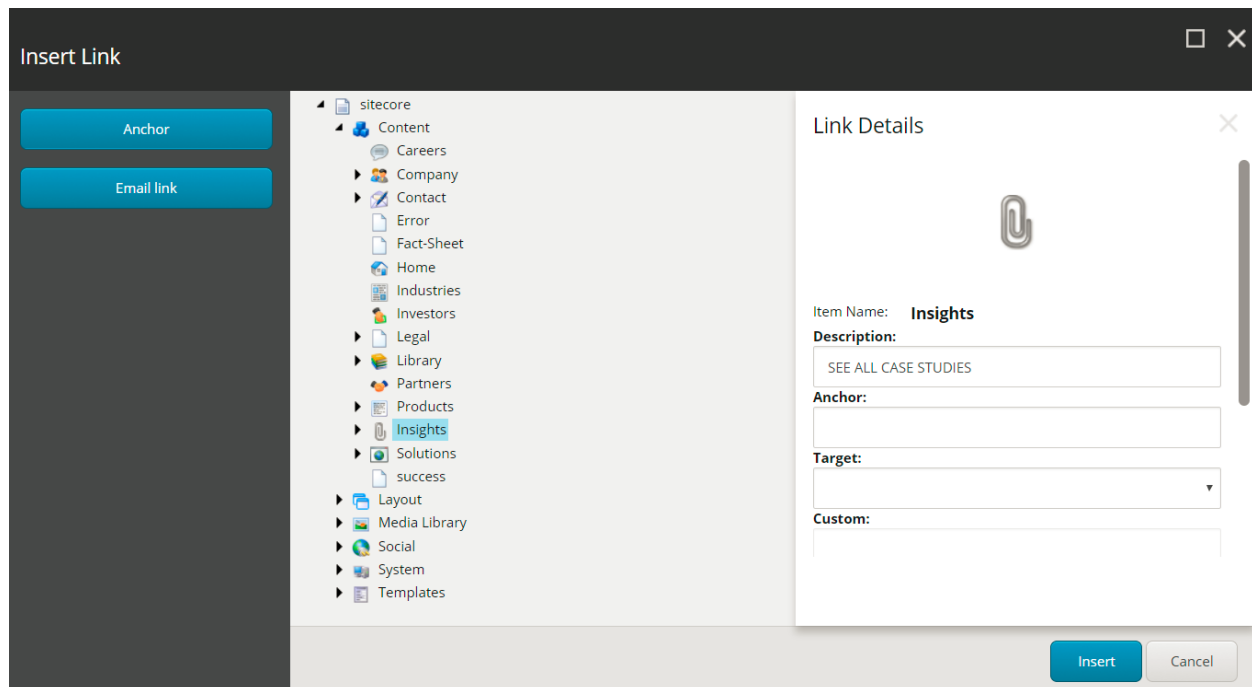


AuthorTitleScopeDetails:

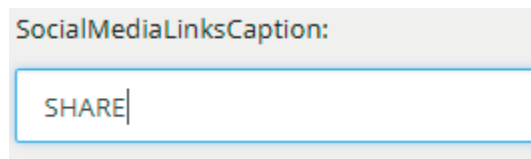
Show editor | Suggest fix | Edit HTML

Fortune 500 Company
Consulting/Project Management
Cloud Services
AWS Services
Azure Management

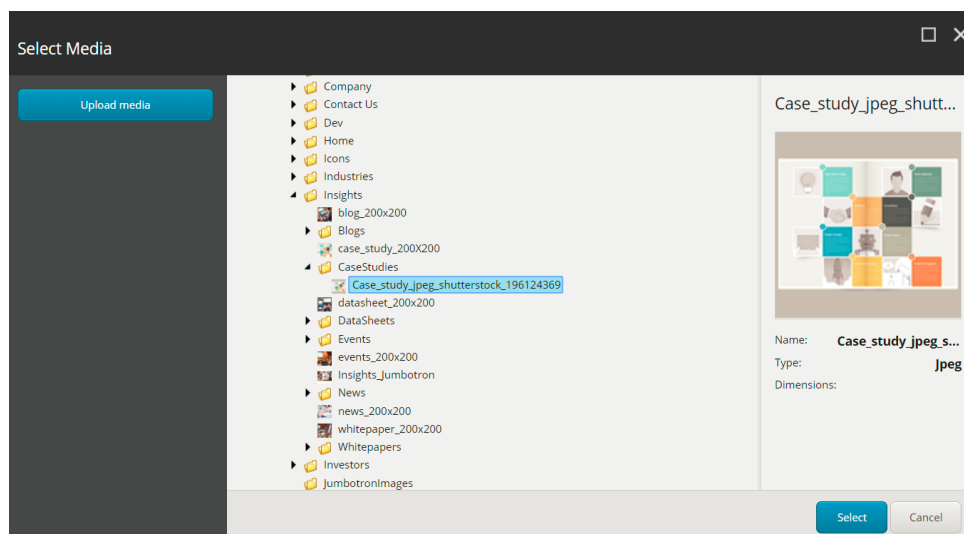
- In the **Backlink** section, select **Insert link** then select Content>Insights. In the **Description** box, enter "SEE ALL CASE STUDIES" then select the **Insert** button:



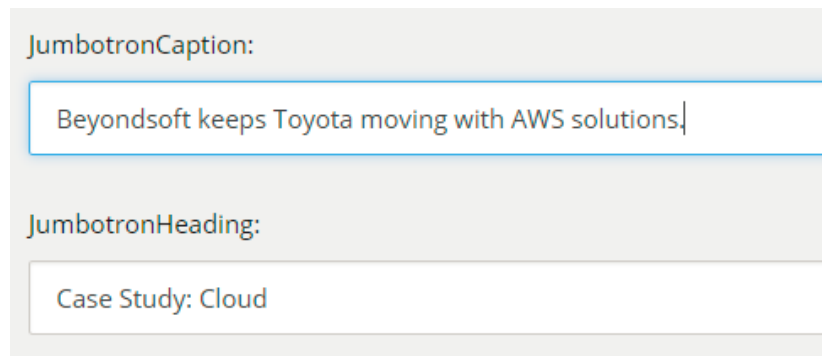
7. In the SocialMediaLinksCaption box, enter "SHARE:"



8. In the **JumbotronImage** section, select **Browse**, then find the case study image in the Insights/Case Studies folder in the Media Library and click on the **Select** button:



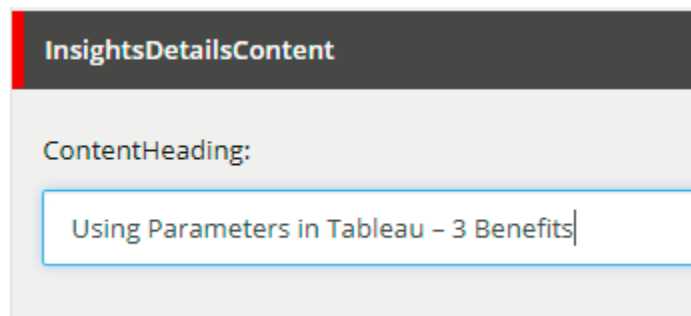
9. Enter copy into the **JumbotronCaption** and enter "Case Study:" and the related solution in the **JumbotronHeading** box:



JumbotronCaption:
Beyondsoft keeps Toyota moving with AWS solutions|

JumbotronHeading:
Case Study: Cloud

10. In the **InsightsDetailsContent** section, in the **ContentHeading** box, enter the title of the case study:



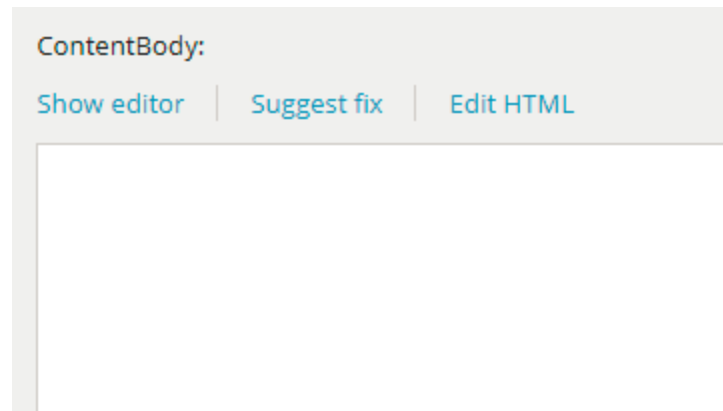
InsightsDetailsContent

ContentHeading:
Using Parameters in Tableau - 3 Benefits|

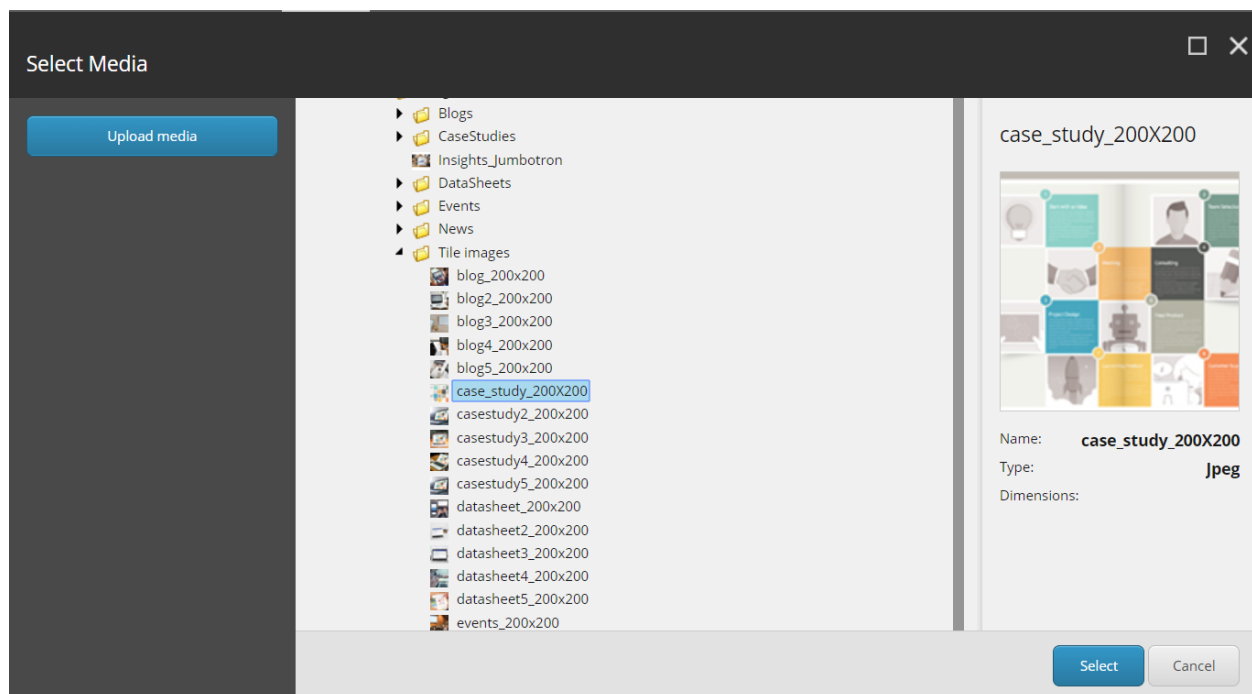
11. Enter the copy of the case study in the **ContentBody** by selecting **Show editor** and typing in the rich text editor box:

Note: *If copying and pasting from an external source, the best practice for results is to paste the content into Notepad, then copying and pasting from Notepad to the rich text editor.*

For consistency purposes, DO NOT update the size or class of the font. This could cause sizing issues, when viewing from mobile devices.



12. After content is entered and formatted, select **Accept**.
13. In the **InsightsSearchResultContent** section, under **InsightsCaptionImage**, select **Browse** and navigate to the **Media Library** to the **Images>Insights** folder. Expand the folder and in the **Tile images** sub folder, choose a 200x200 image that is associated with the case study:



14. Add a headline in the **InsightsCaptionHeadline** text box:

InsightsCaptionHeadline:

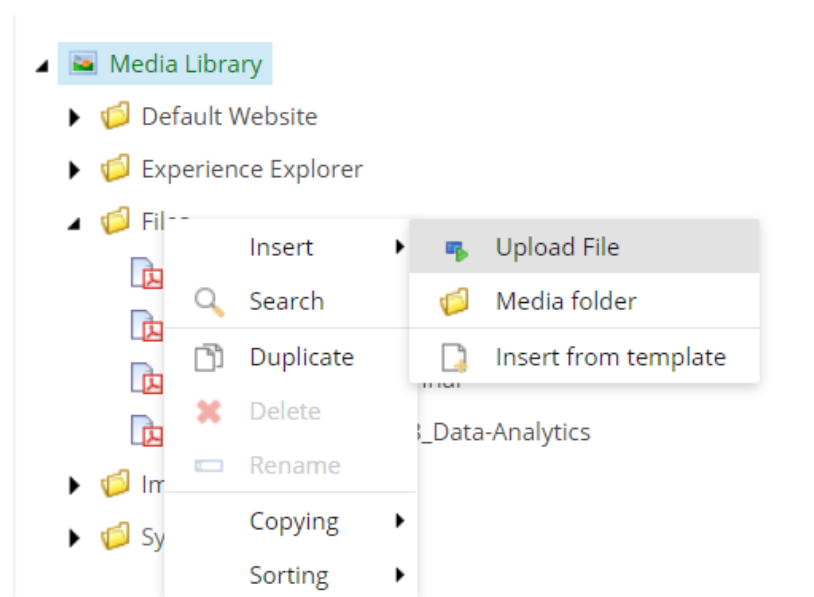
Toyota and AWS Cloud

15. Save and preview the page before publishing.

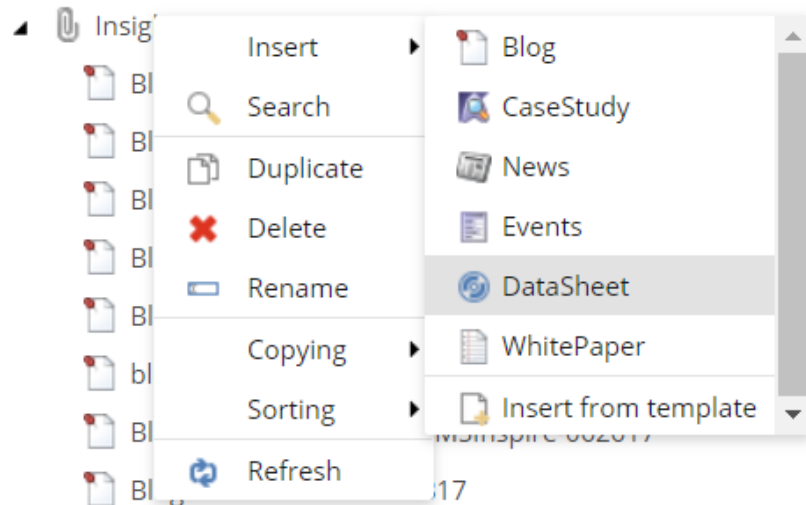
Data Sheets and White Papers

To upload Data Sheet or White Paper files and create a download page:

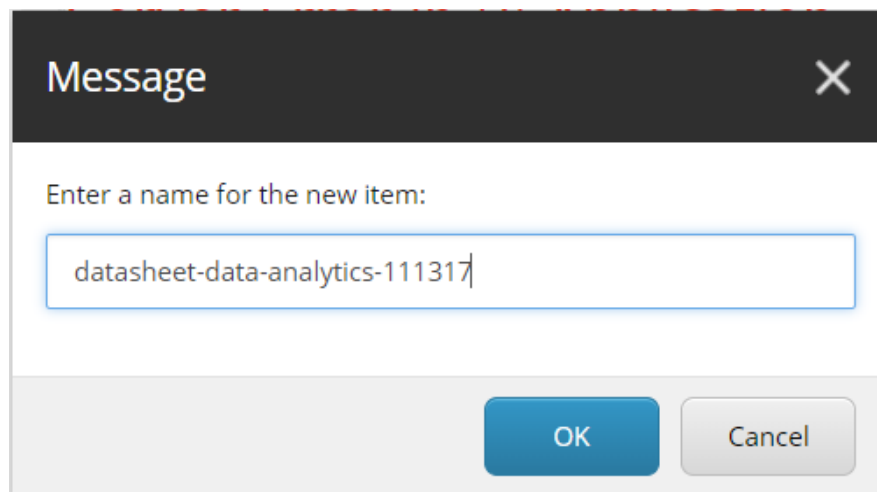
1. Go to **Media Library**, right-click the **Files** folder, select **Upload File** then select the desired file from your local drive:



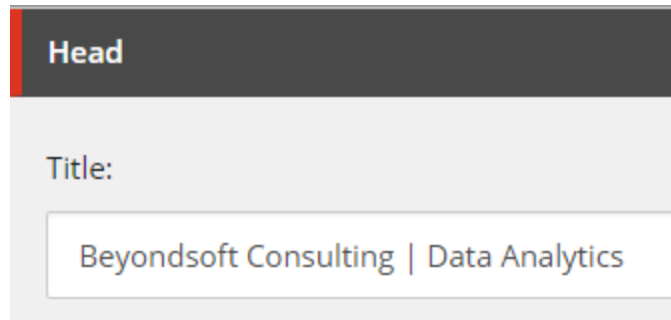
2. Go to **Content Editor**, right click on the **Insights** folder select **Insert** then select **DataSheet** or **WhitePaper**:



3. In the Message dialog box that appears, [use the naming convention style from above](#) to enter a name and date for the data sheet or white paper:



4. In **Head** section of the page, enter "Beyondsoft Consulting |" followed by the title of the data sheet or white paper in the **Title** box:

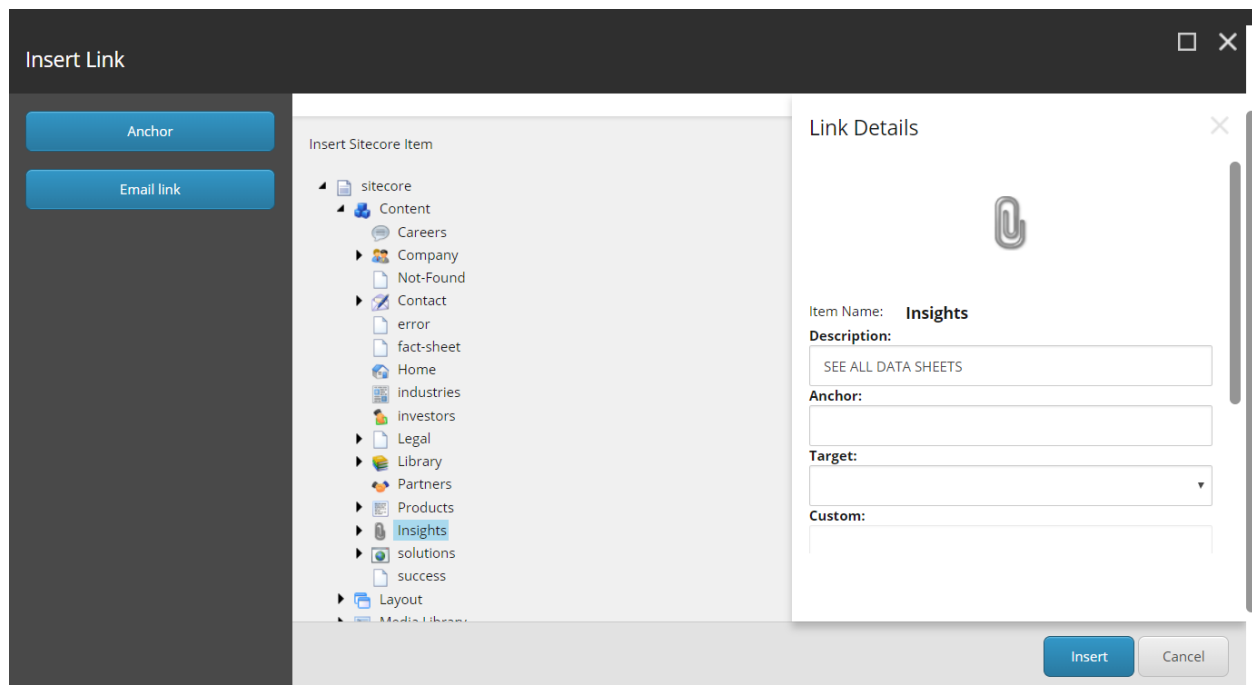


Head

Title:

Beyondsoft Consulting | Data Analytics

5. In the **Backlink** section, select **Insert link** then select Content>Insights. In the **Description** box, enter "SEE ALL DATA SHEETS" or "SEE ALL WHITE PAPERS" then select the **Insert** button:



Insert Link

Anchor

Email link

Insert Sitecore Item

- sitecore
 - Content
 - Careers
 - Company
 - Not-Found
 - Contact
 - error
 - fact-sheet
 - Home
 - industries
 - investors
 - Legal
 - Library
 - Partners
 - Products
 - Insights**
 - solutions
 - success
 - Layout
 - Media Library

Link Details

Item Name: **Insights**

Description: SEE ALL DATA SHEETS

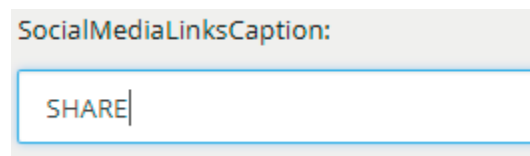
Anchor:

Target:

Custom:

Insert Cancel

6. In the SocialMediaLinksCaption box, enter "SHARE:"

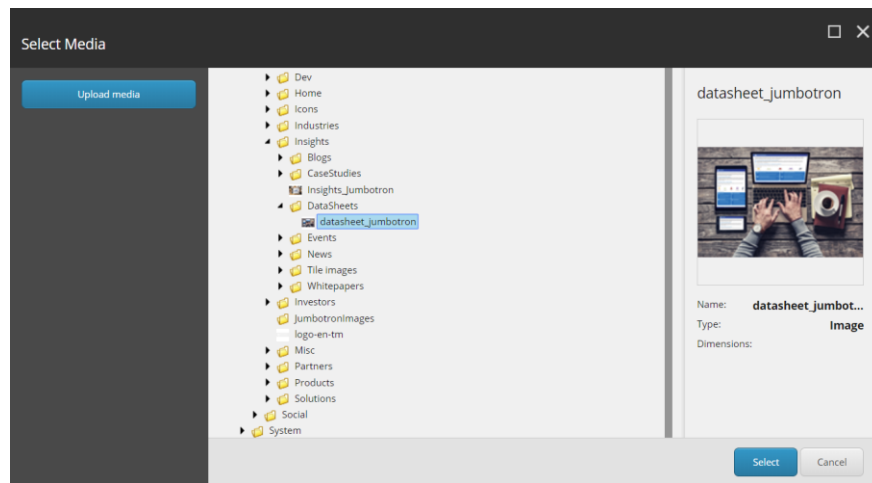


SocialMediaLinksCaption:

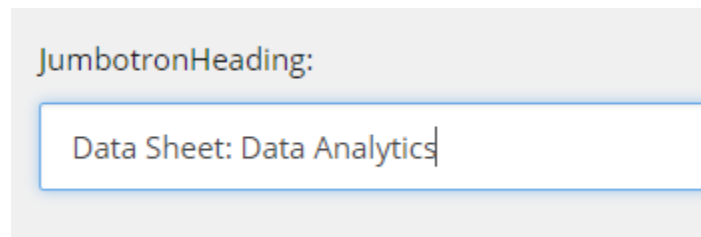
SHARE

7. In the **JumbotronImage** section, select **Browse**, then find the data sheets or white papers image in the Insights/DataSheets or

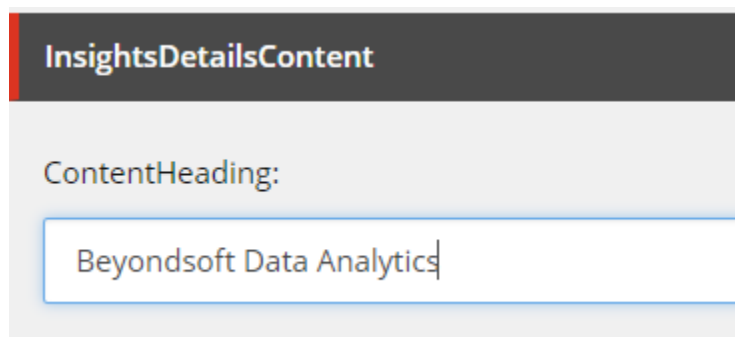
Insights/Whitepapers folder in the Media Library and click on the **Select** button:



8. Enter "Data Sheet:" or "White Paper:" and the related data sheet or white paper information in the **JumbotronHeading** box:



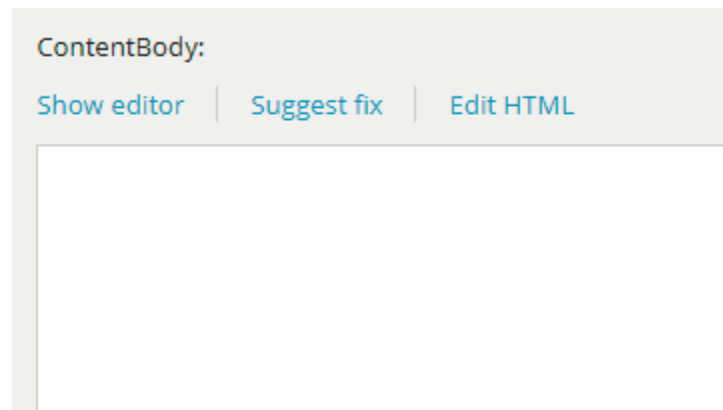
9. In the **InsightsDetailsContent** section, in the **ContentHeading** box, enter the title of the data sheet or white paper:



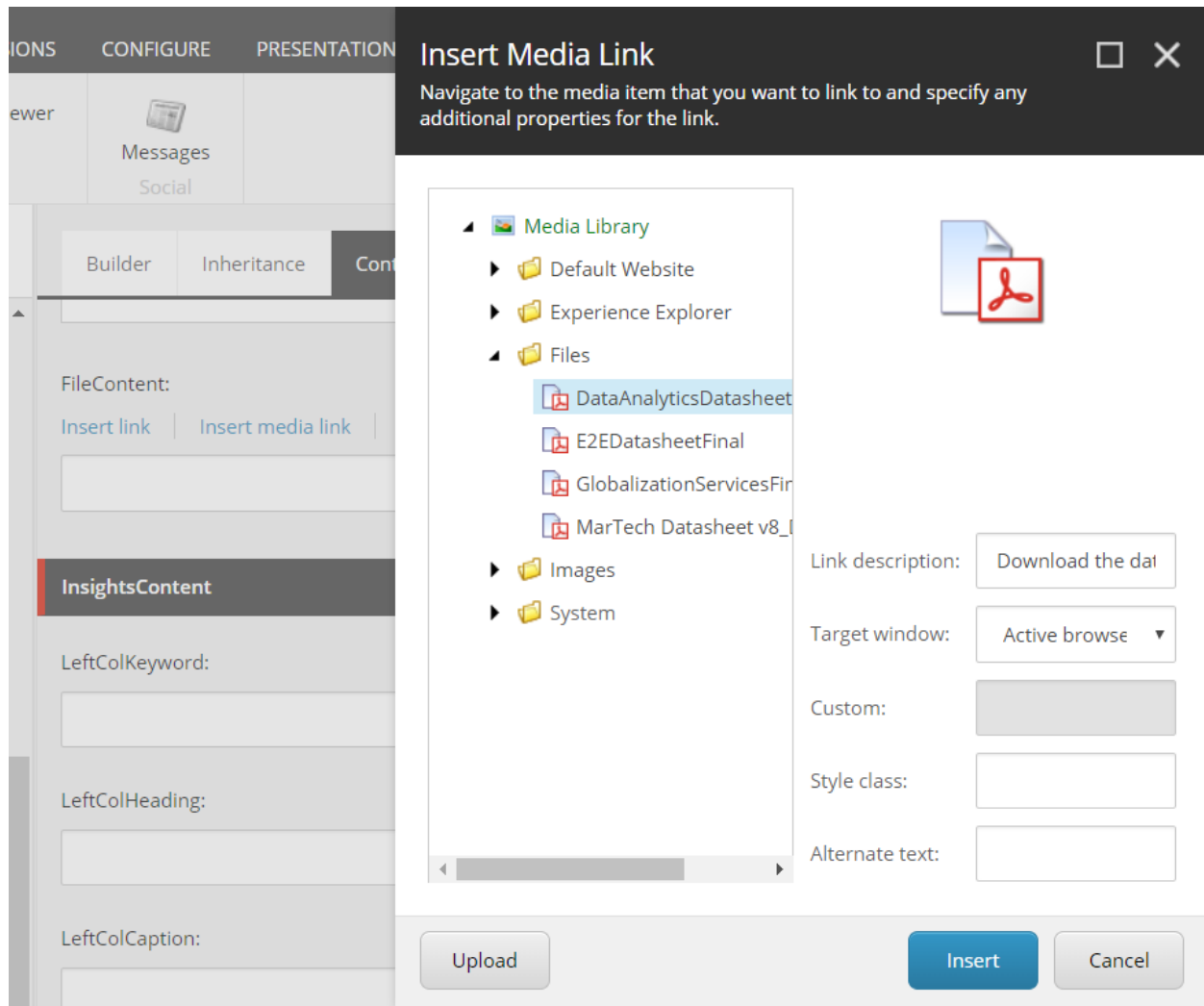
10. Enter the intro copy of the data sheet or white paper in the **ContentBody** by selecting **Show editor** and typing in the rich text editor box:

Note: *If copying and pasting from an external source, the best practice for results is to paste the content into Notepad, then copying and pasting from Notepad to the rich text editor.*

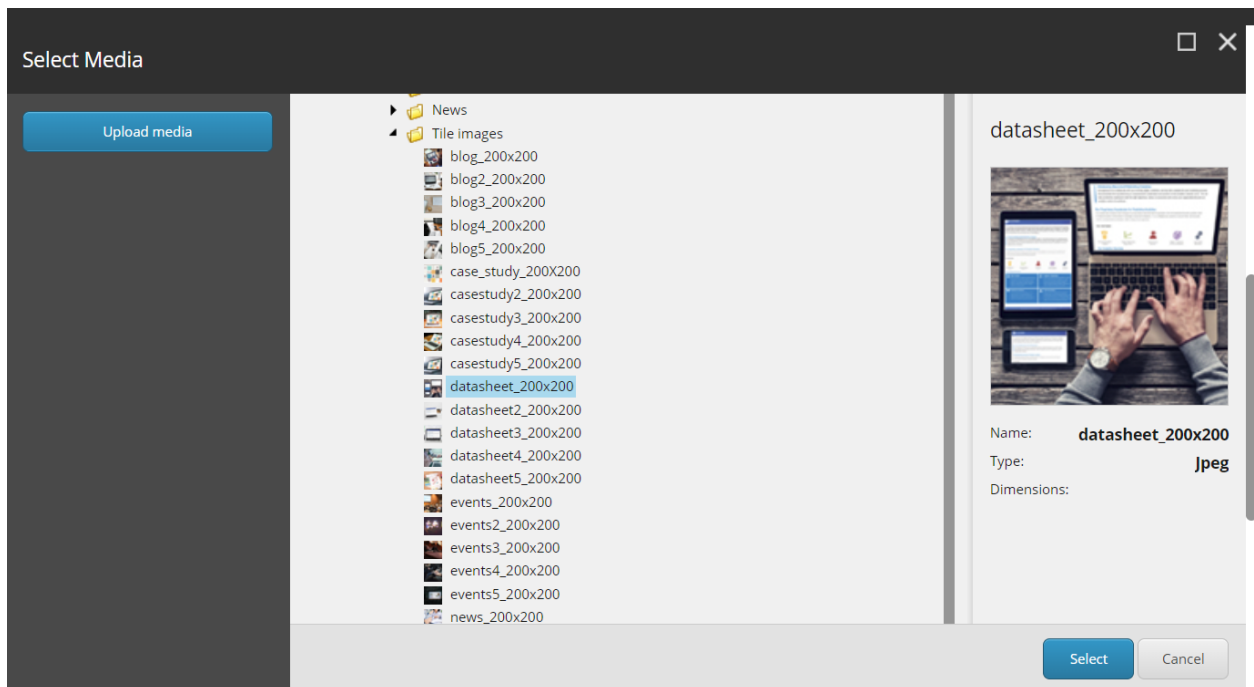
For consistency purposes, DO NOT update the size or class of the font. This could cause sizing issues, when viewing from mobile devices.



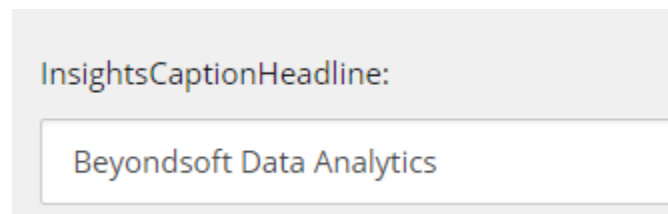
11. When content entry is complete, select **Accept**.
12. To add the file to the download page, select **Insert media link** in the **FileContent** section, then select the **Files** folder. Click on the data sheet or white paper you uploaded earlier and add "Download the data sheet" or "Download the white paper" to the **Link description** text block. Click the **Insert** button to link the file to the page:



13. In the **InsightsSearchResultContent** section, under **InsightsCaptionImage**, select **Browse** and navigate to the **Media Library** to the **Images>Insights** folder. Expand the folder and in the **Tile images** sub folder, choose a 200x200 image that is associated with the data sheet or whitepaper:



14. Add a headline in the **InsightsCaptionHeadline** text box:

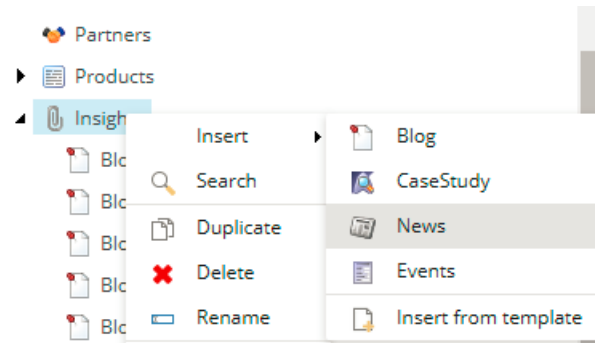


15. Save and preview the page before publishing.

News

To enter news content:

1. Right click on the **Insights** folder select **Insert** then select **News**:



2. In the Message dialog box that appears, [use the naming convention style from above](#) to enter a name and date for the news article:

A screenshot of the 'Message' dialog box in Sitecore. The dialog has a dark header with the title 'Message' and a close button (X). Below the header, it says 'Enter a name for the new item:'. There is a text input field containing the text 'news-release-datacenterawardstoyota-042117'. At the bottom of the dialog, there are two buttons: 'OK' and 'Cancel'.

3. In **Head** section of the page, enter "Beyondsoft Consulting |" followed by the title of the article in the **Title** box:

A screenshot of the 'Head' section of a page in Sitecore. The 'Head' section is highlighted with a dark background and a red vertical bar on the left. Below the 'Head' section, there is a 'Title:' label and a text input field. The text input field contains the text 'Beyondsoft Consulting | Datacenter Dynamics U.S and Canada Awards for Toyota Cloud Migrations and Securities Work'.

4. In the **InsightsDetails** section enter the author name information and publish date in the **AuthorNameScope** box by selecting **Show editor** and entering content in the rich text editor (If a press release, insert contact information):



The screenshot shows a web interface for editing content. At the top, there is a dark grey header with the text 'InsightsDetails' in white. Below this, there is a light grey box labeled 'AuthorNameScope:'. Inside this box, there are three buttons: 'Show editor' (highlighted in blue), 'Suggest fix', and 'Edit HTML'. Below the buttons, there is a text area containing the text 'Written by John Doe' and 'May 19, 2017'.

Note: To maintain consistent styling, the date should be set at font size 4. For contact information the format should be as in the following example:

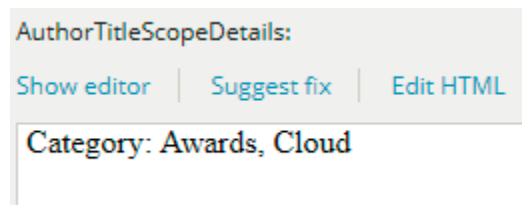
Contact: (size 2)

Macala Wright (with email link, size 4)

Marketing Operations Lead (size 2)

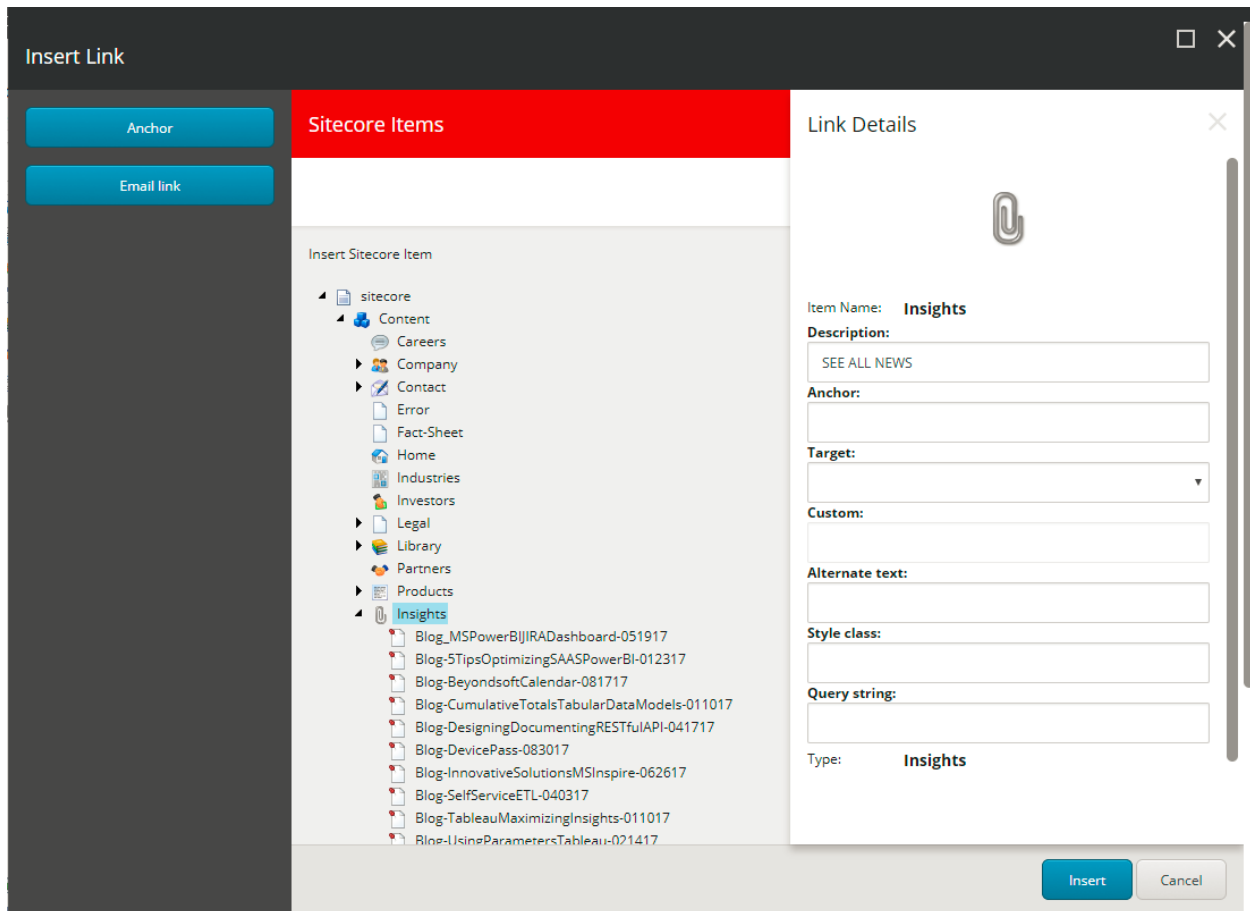
Beyondsoft NA (Size 2)

5. If needed, enter category information in the **AuthorTitleScopeDetails** box by selecting **Show editor** and entering content in the rich text editor:

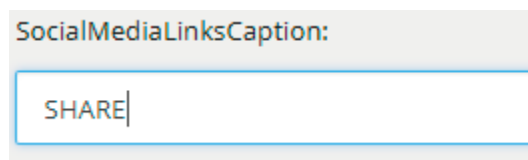


The screenshot shows a web interface for editing content. At the top, there is a light grey box labeled 'AuthorTitleScopeDetails:'. Inside this box, there are three buttons: 'Show editor' (highlighted in blue), 'Suggest fix', and 'Edit HTML'. Below the buttons, there is a text area containing the text 'Category: Awards, Cloud'.

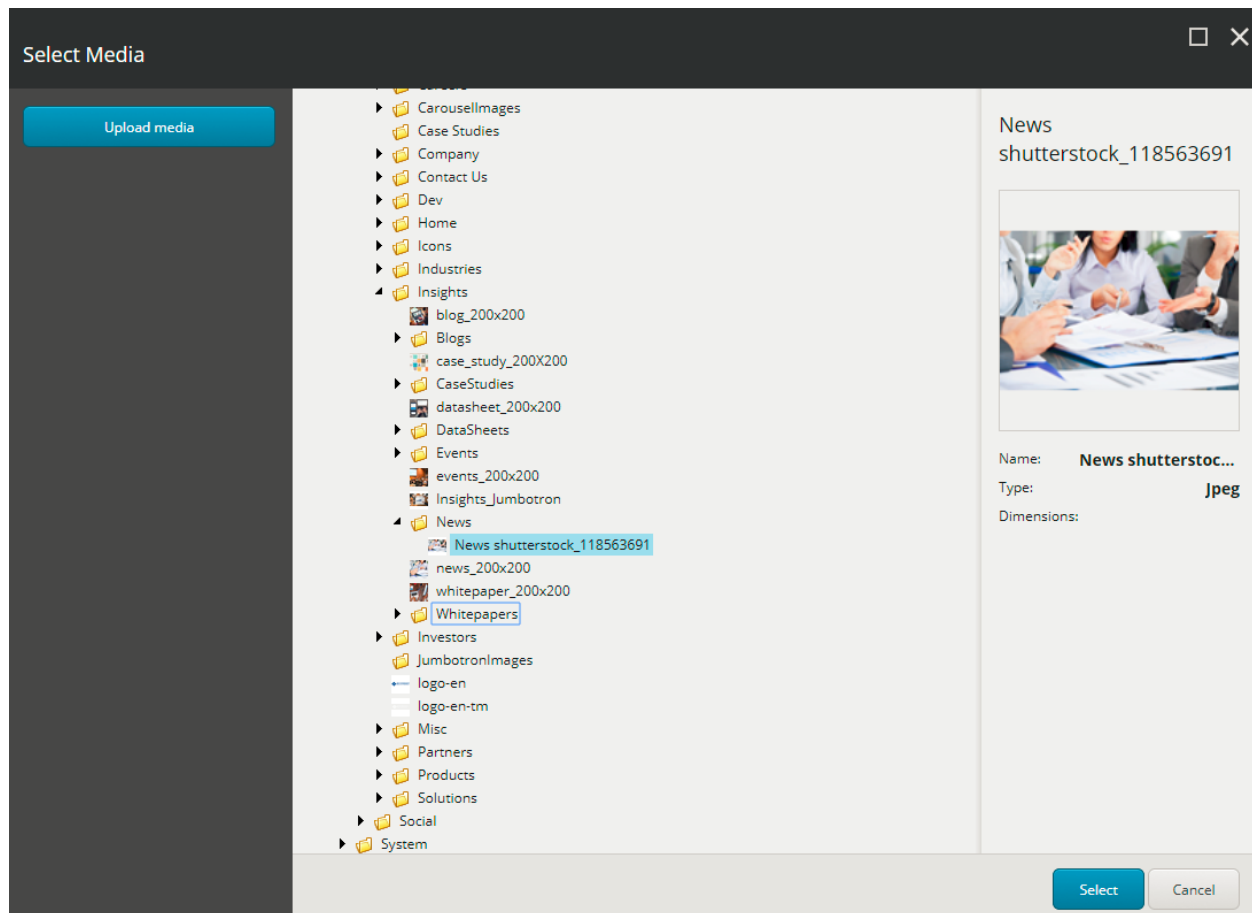
6. In the **Backlink** section, select **Insert link** then select Content>Insights. In the **Description** box, enter "SEE ALL NEWS" then select the **Insert** button:



7. In the SocialMediaLinksCaption box, enter "SHARE:"



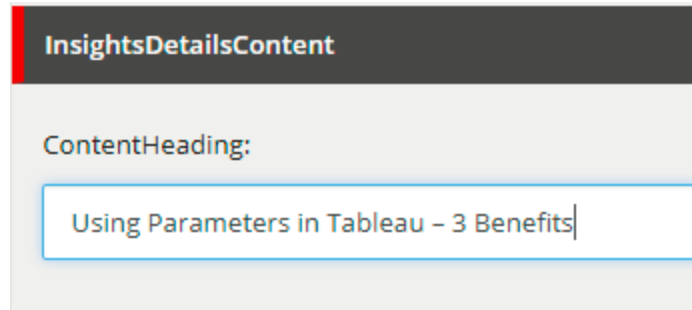
8. In the **JumbotronImage** section, select **Browse**, then find the news image in the Insights/News folder in the Media Library and click on the **Select** button:



9. Leave the **JumbotronCaption** blank (unless the article is a press release”) but enter “News” in the **JumbotronHeading** box:

JumbotronCaption:	<input type="text"/>
	<input type="text" value="Press Release"/>
JumbotronHeading:	<input type="text"/>
	<input type="text" value="NEWS"/>

10. In the **InsightsDetailsContent** section, in the **ContentHeading** box, enter the title of the article:

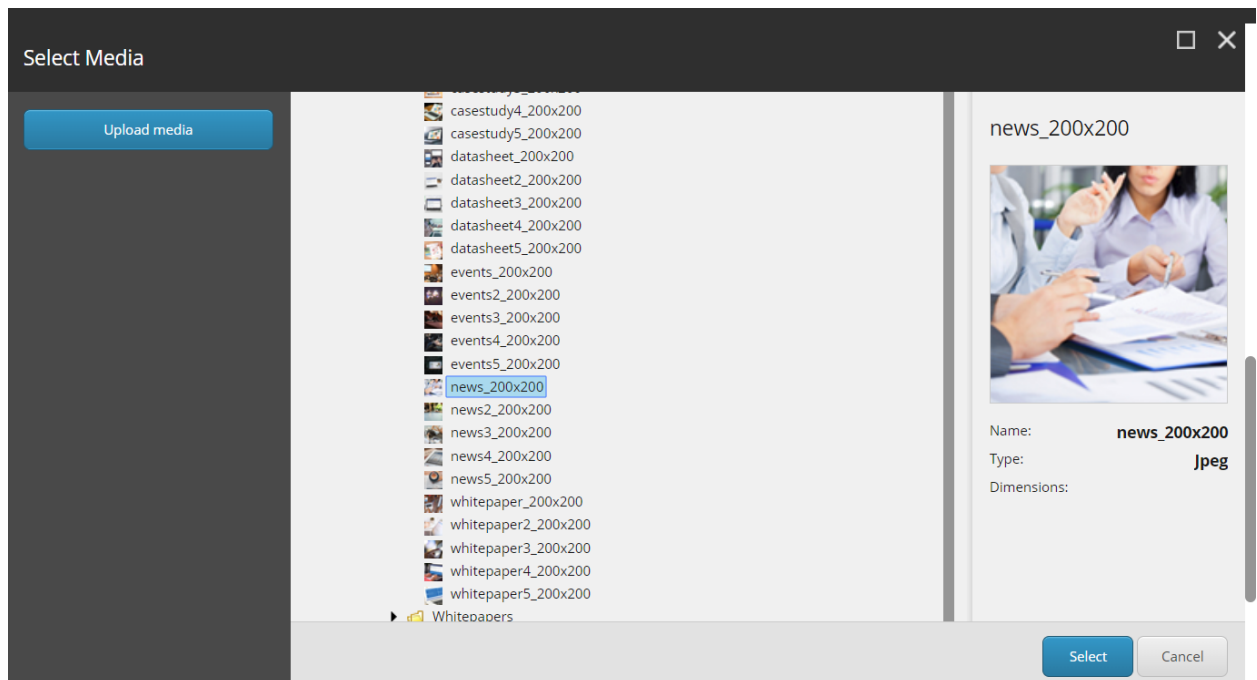


11. Enter the copy of the article in the **ContentBody** by selecting **Show editor** and typing in the rich text editor box:

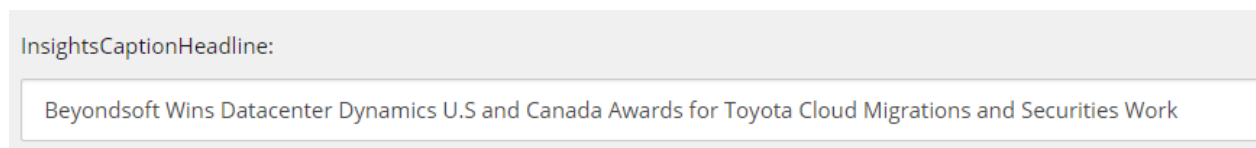
Note: *If copying and pasting from an external source, the best practice for results is to paste the content into Notepad, then copying and pasting from Notepad to the rich text editor.*

For consistency purposes, DO NOT update the size or class of the font. This could cause sizing issues, when viewing from mobile devices.

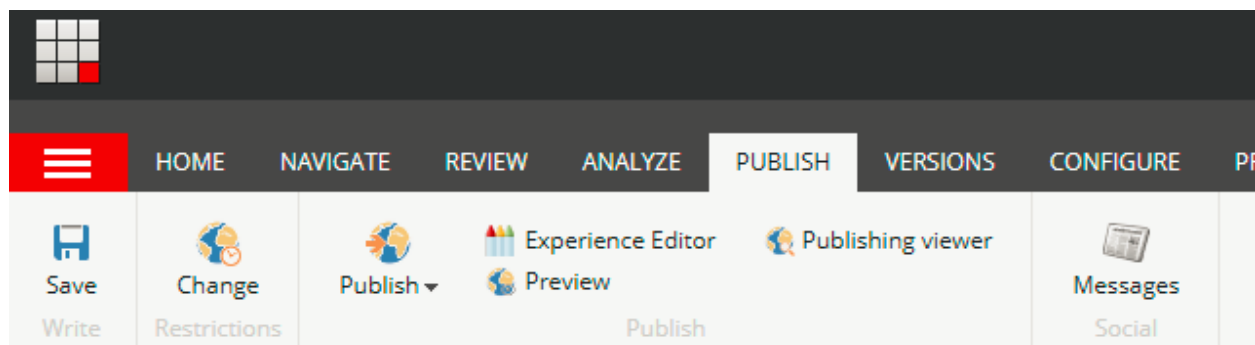
12. In the **InsightsSearchResultContent** section, under **InsightsCaptionImage**, select **Browse** and navigate to the **Media Library** to the **Images>Insights** folder. Expand the folder and in the **Tile images** sub folder, choose a 200x200 image that is associated with the news article:



13. Add a headline in the **InsightsCaptionHeadline** text box:



14. When content is complete, select **Accept** then enter **Publishing Settings** - Select the **PUBLISH** tab at the top of the page, then select **Change**:



15. In the pop-up window, select the **Publishable from** and **Publishable to** dates and times, then select the **OK** button. This will keep content from becoming old:

Publishing Settings □ ×
Specify the publishing settings for the selected item.

VERSIONS | ITEM | TARGETS

Specify when you want each version of the selected item to be publishable. This applies to the current language only.

Version	Publishable	Publishable from		Publishable to	
1.	<input checked="" type="checkbox"/>	10/26/2017	12:00 AM	4/26/2018	12:00 AM

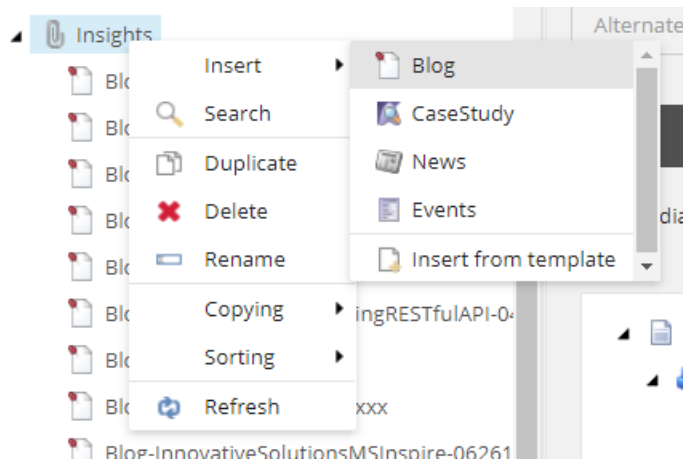
OK **Cancel**

16. When complete, save and preview the page before publishing.

Blogs

To enter blog content:

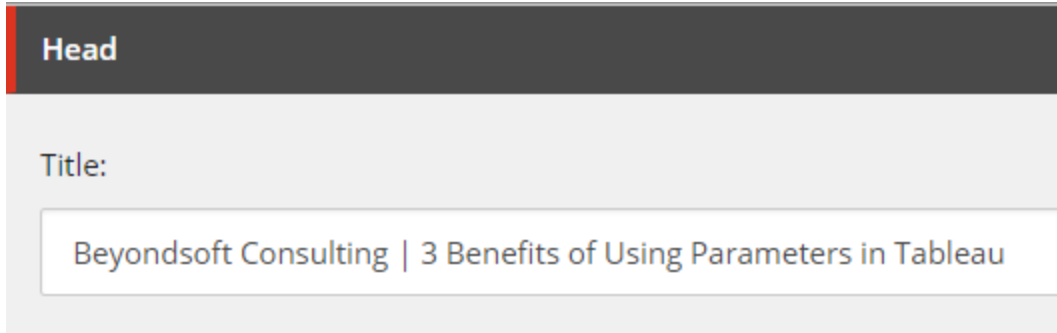
1. Right click on the **Insights** folder select **Insert** then select **Blog**:



2. In the Message dialog box that appears, [use the naming convention style from above](#) to enter a name and date for the blog:

A screenshot of the 'Message' dialog box in Sitecore. The dialog has a dark header with the title 'Message' and a close button (X). Below the header, there is a text prompt: 'Enter a name for the new item:'. A text input field contains the text 'blog-usingparameterstableau-021417'. At the bottom of the dialog, there are two buttons: 'OK' (blue) and 'Cancel' (grey).

3. In **Head** section of the page, enter "Beyondsoft Consulting |" followed by the title of the blog in the **Title** box:



Head

Title:

Beyondsoft Consulting | 3 Benefits of Using Parameters in Tableau

4. In the **InsightsDetails** section enter the author name information and publish date in the **AuthorNameScope** box by selecting **Show editor** and entering content in the rich text editor:



InsightsDetails

AuthorNameScope:

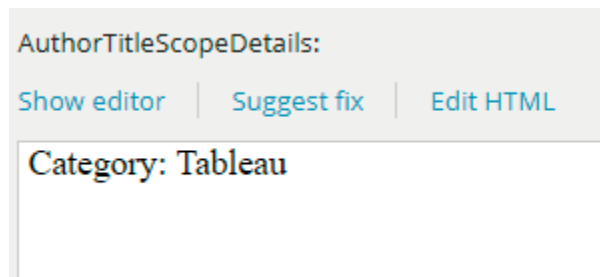
Show editor | Suggest fix | Edit HTML

Written by John Doe

May 19, 2017

Note: To maintain consistent styling, the date should be set at font size 4.

5. Enter category information in the **AuthorTitleScopeDetails** box by selecting **Show editor** and entering content in the rich text editor:

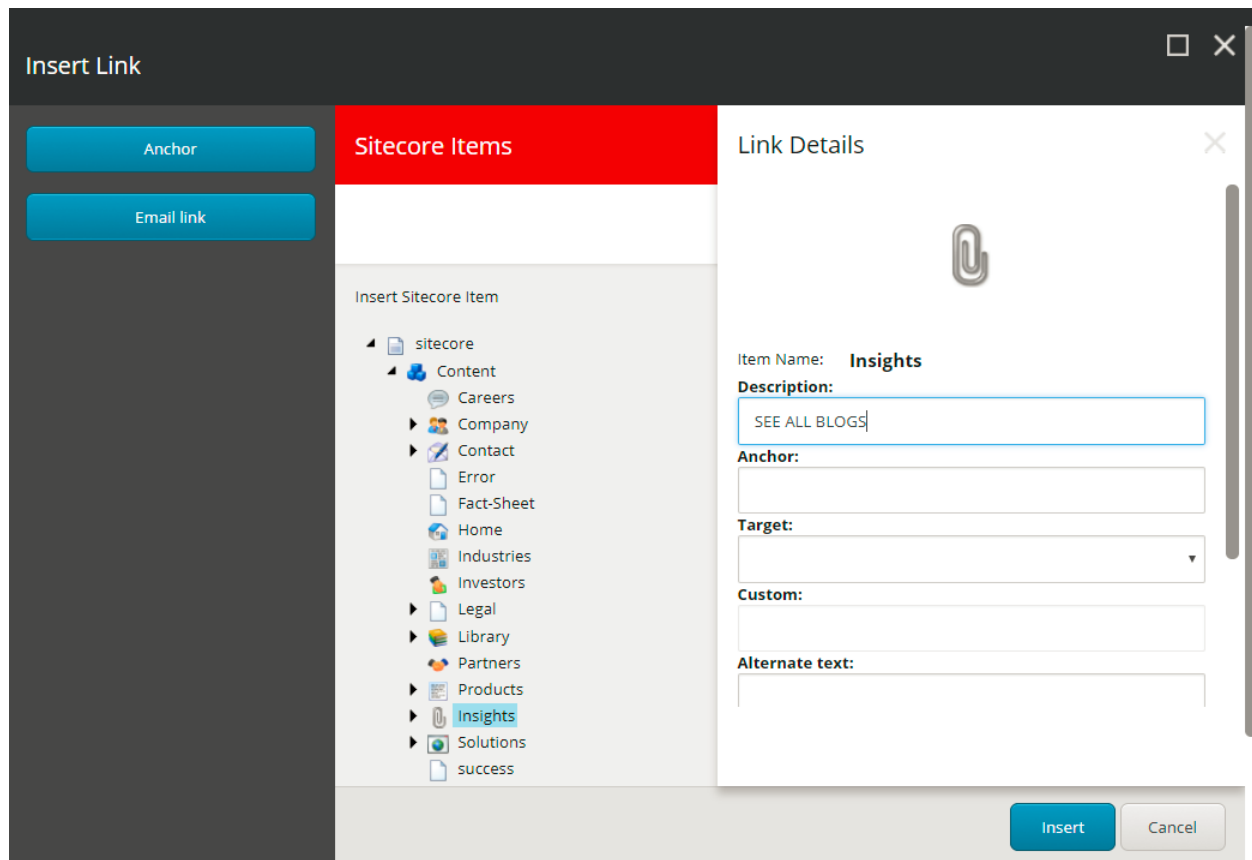


AuthorTitleScopeDetails:

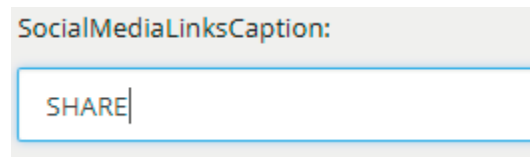
Show editor | Suggest fix | Edit HTML

Category: Tableau

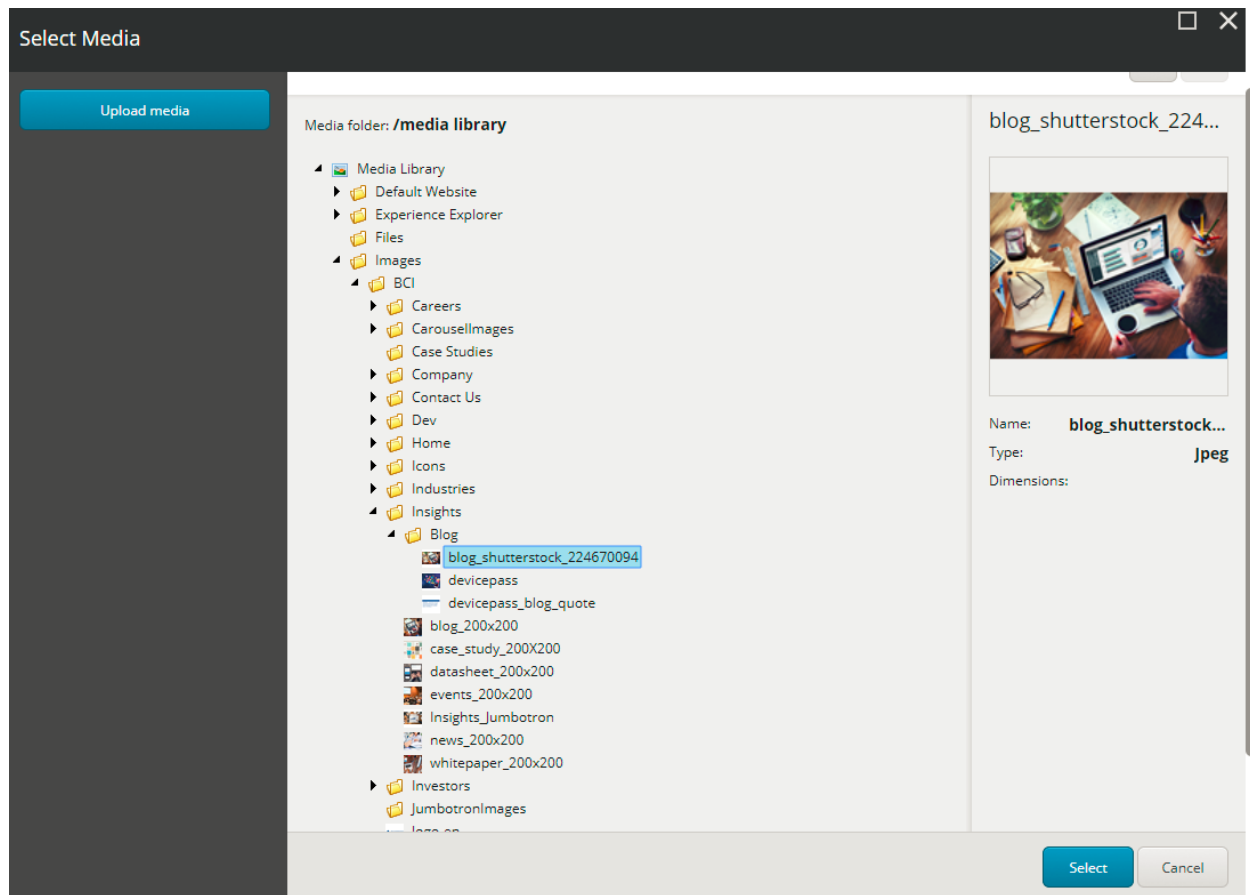
6. In the **Backlink** section, select **Insert link** then select Content>Insights. In the **Description** box, enter "SEE ALL BLOGS" then select the **Insert** button:



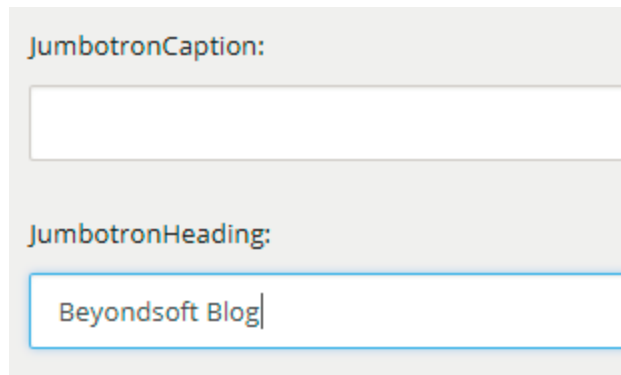
7. In the SocialMediaLinksCaption box, enter "SHARE:"



8. In the **JumbotronImage** section, select **Browse**, then find the blog image in the Insights/Blog folder in the Media Library and click on the **Select** button:



9. Leave the **JumbotronCaption** blank but enter "Beyondsoft Blog" in the **JumbotronHeading** box:

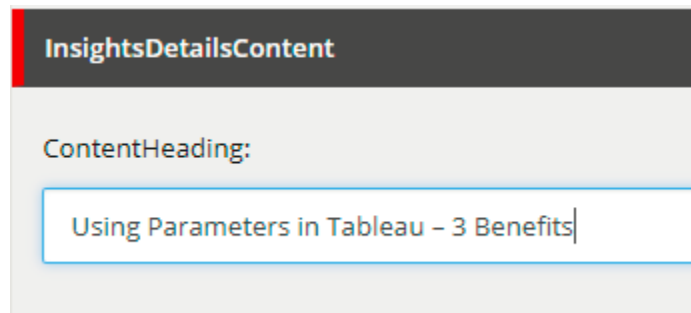


JumbotronCaption:

JumbotronHeading:

Beyondsoft Blog

10. In the **InsightsDetailsContent** section, in the **ContentHeading** box, enter the title of the blog:



InsightsDetailsContent

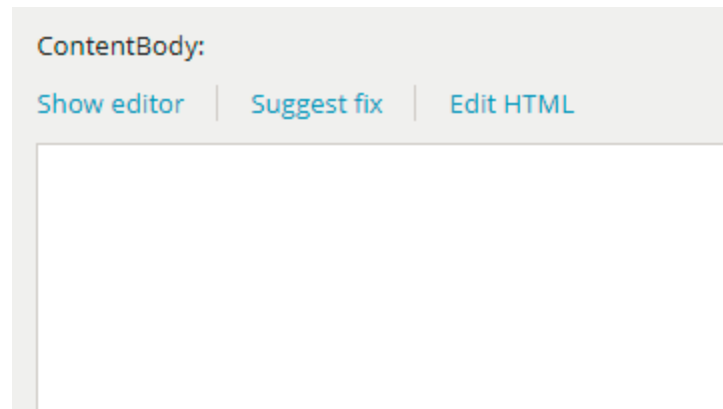
ContentHeading:

Using Parameters in Tableau - 3 Benefits

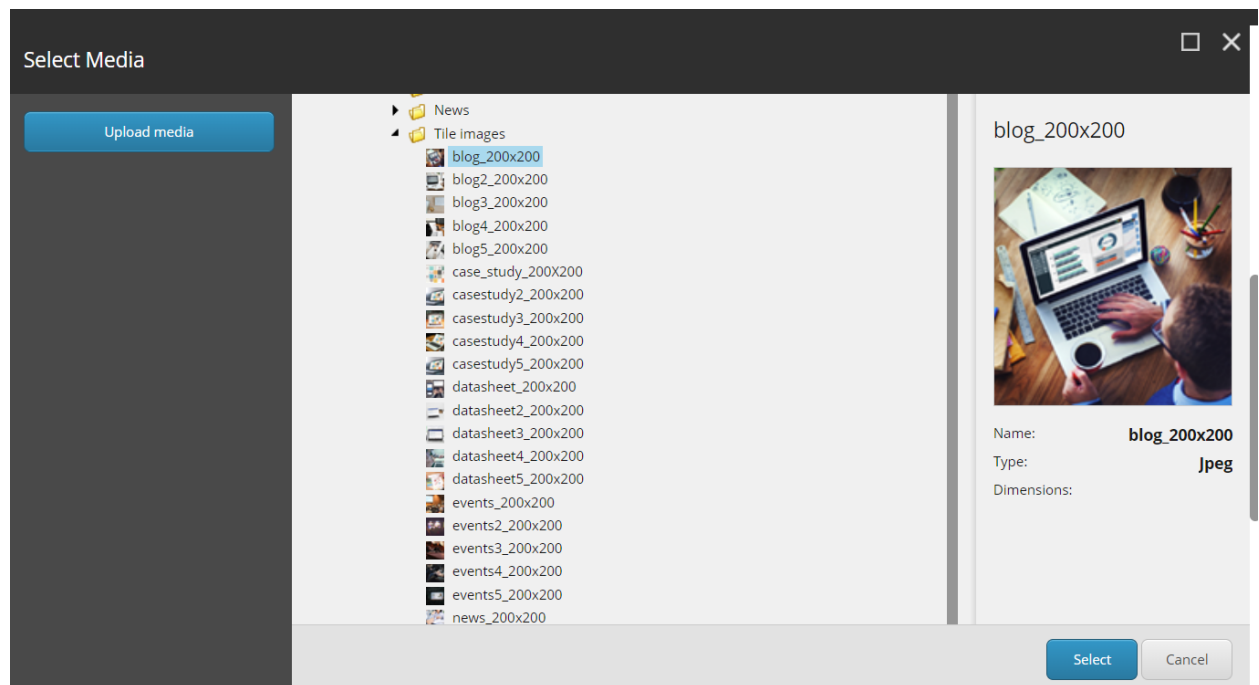
11. Enter the copy of the blog in the **ContentBody** by selecting **Show editor** and typing in the rich text editor box:

Note: *If copying and pasting from an external source, the best practice for results is to paste the content into Notepad, then copying and pasting from Notepad to the rich text editor.*

For consistency purposes, DO NOT update the size or class of the font. This could cause sizing issues, when viewing from mobile devices.



12. When content entry and formatting is complete, select **Accept**.
13. In the **InsightsSearchResultContent** section, under **InsightsCaptionImage**, select **Browse** and navigate to the **Media Library** to the **Images>Insights** folder. Expand the folder and in the Tile images sub folder, choose a 200x200 image that is associated with the blog:



14. Add a headline in the **InsightsCaptionHeadline** text box:

InsightsCaptionHeadline:

3 Benefits of Using Parameters in Tableau

15. Save and preview the page before publishing.

Careers

- Employee quote carousel
 - See the [Carousels](#) section for updating.
- Featured openings
 1. Go to the following URL for the most recent job listings:
<https://us-careers-beyondsoft.icims.com/jobs/search>
 2. In the **FeaturedOpenings** section, enter the relevant copy in the **FeatureOpeningHeading1** and **FeatureOpeningLocation1** text boxes:

FeaturedOpenings

FeatureOpeningHeading1:

Marketing Strategist

FeatureOpeningLocation1:

Bellevue, WA

3. In the **FeatureOpeningLink1** section, click on **Insert external link**. In the dialog box that pops up, enter “Learn more” in the **Link description** text box. Enter the URL of the specific job opening and select **New browser** in the **Target Window** drop down menu, then select the **Insert** button:

Note: You can select the **Test** button to see if the link is correct.

Insert External Link □ ×

Enter the URL for the external website that you want to insert a link to and specify any additional properties for the link.

Link description:

URL:

Target window: ▼

Custom:

Style class:

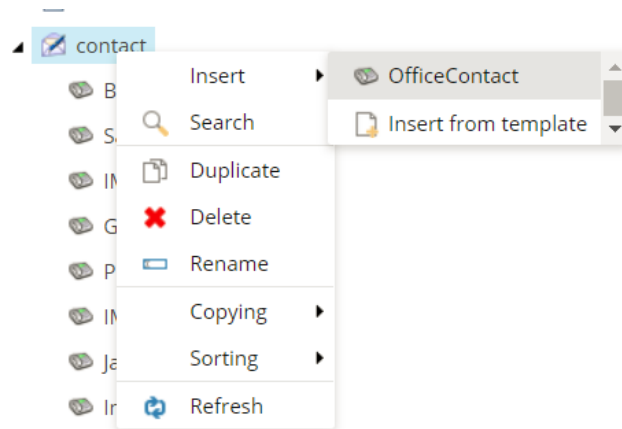
Alternate text:

Repeat the same steps for remaining **FeatureOpeningHeading**, **FeatureOpeningLocation**, and **FeatureOpeningLink** sections.

Contact

To enter contact content:

1. Right click on the **Insights** folder select **Insert** then select **OfficeContact**:



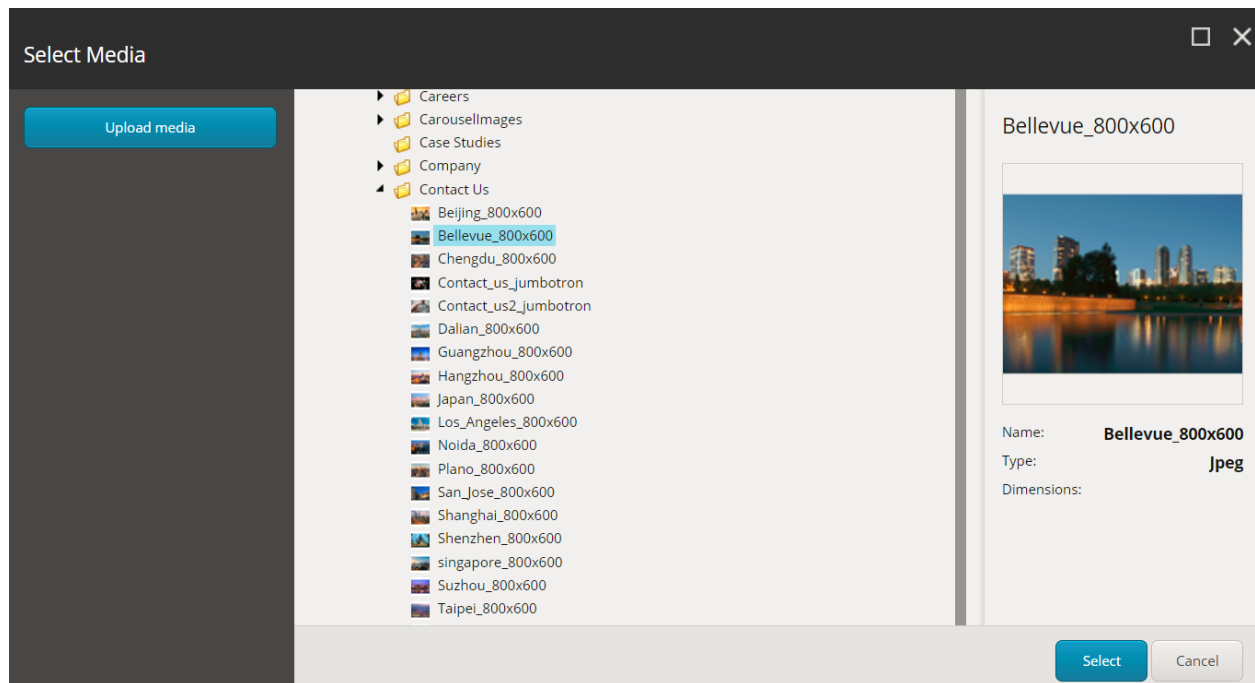
2. In the **Message** dialog box that appears, enter the city/state or location for the contact:

A screenshot of a 'Message' dialog box. The title bar is dark with the word 'Message' and a close button. Below the title bar, there is a prompt 'Enter a name for the new item:' followed by a text input field containing 'BellevueWA'. At the bottom of the dialog, there are two buttons: 'OK' and 'Cancel'.

3. In **OfficeContact** section of the page, enter the city information in the OfficeLocation section:

A screenshot of a form section labeled 'OfficeLocation:'. Below the label is a text input field containing the text 'Bellevue, WA'.

4. In the **OfficelImage** section, select **Browse**, then find the city image in the **Contact Us** folder in the **Media Library** and click on the **Select** button:



5. Enter the address and email link information in the **OfficeAddress** section by selecting **Show editor** and typing in the rich text editor box:

Note: *If copying and pasting from an external source, the best practice for results is to paste the content into Notepad, then copying and pasting from Notepad to the rich text editor.*

For consistency purposes, DO NOT update the size or class of the font. This could cause sizing issues, when viewing from mobile devices.

OfficeAddress:

Show editor | Suggest fix | Edit HTML

3025 112th Avenue NE, Ste 200 Bellevue, WA 98004

Tel: +1-425-242-5419

Fax: +1-425-298-4056

sales@us.beyondsoft.com

6. Add the country in the **OfficeCountry** text box:

OfficeCountry:

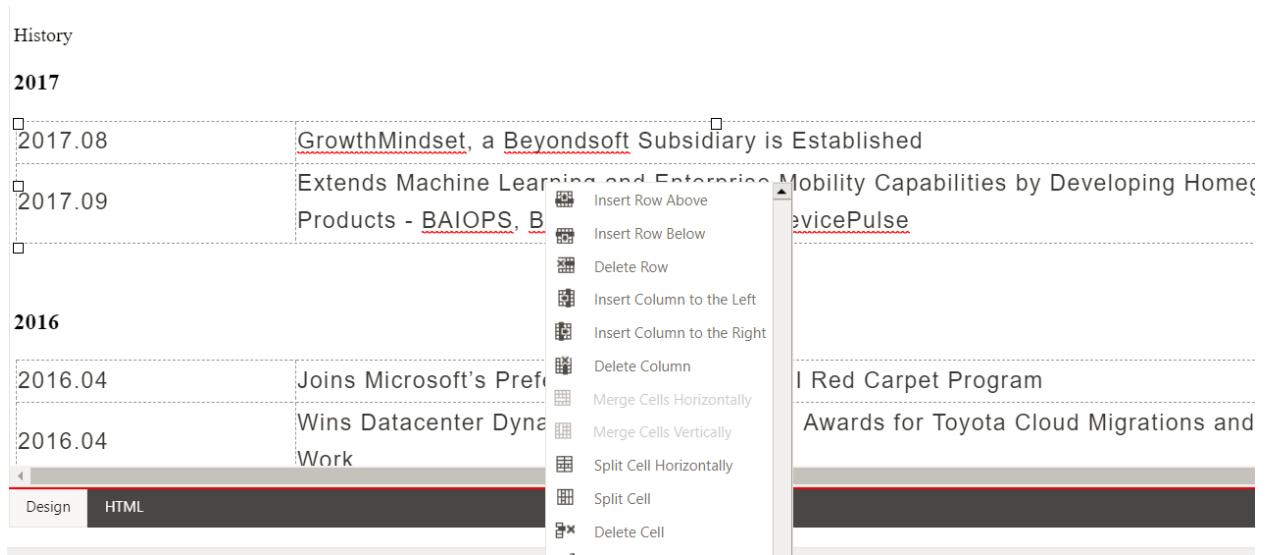
UNITED STATES

7. When content is complete, select **Accept** then save and preview the page before publishing.

Fact Sheet

To add content:

1. When adding a row or column to a table, select Rich text editor and right click within the table. A selection pop-up window will appear. Click on the action you want:



2. Enter the content in the selected cell.

NOTE: For consistency purposes, DO NOT update the size or class of the font. This could cause sizing issues, when viewing from mobile devices.