

STUDENT LAB GUIDE

Sitecore Web Experience Management

Sitecore version 9

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Welcome!

Welcome to *Sitecore Web Experience Management course*! This one-day, hands-on training is designed to give you the understanding that you will need to work with a project using Sitecore as a Content Management System. By working through guided student labs, live demonstrations, and question and answer sessions, you will learn how to deliver personalized experiences to your customers in the context of their previous interactions with your company.

We hope you enjoy the course!

The Training Site

To train business users in Sitecore XP, we have created a website for a fictional company called *Habitat Home*. This website promotes smart home systems, kitchen appliances, health products, gaming devices and handheld, mobile and desktop computing devices.

The strategic theme of the Habitat Home website is to increase the revenue of online sales. Students in the Sitecore Web Experience Management course will use the Habitat Home website to complete labs during the training course. When you log in to Sitecore XP, you will be using the credentials of a Sitecore user, each of whom will have different permission levels as well as different tasks to complete depending on their role.

Guidance

Be sure to follow the lab steps in this guide in the order they are presented and use the exact file names listed in each lesson. This will ensure that your lab work matches the expected results and will enable a trainer to troubleshoot, if required.

Course Materials

You will receive a *Sitecore Web Experience Management Student Guide* from your trainer before the course.

Software, Setup and Tools

Sitecore Training Website

For this course, students will be working the Habitat Home website, which is a website for a fictional company used specifically for Sitecore training purposes.

Sitecore VM or Local Install

You should connect to the training site either through a VM provided by Sitecore or with a local install depending on your location.

Prerequisites

No prerequisites are required for this course.

Module 1: Understanding Sitecore Experience Platform

This module provides a high-level overview of Sitecore XP and an introduction to the xManagement (XM) features.

By the end of this module, you will be able to:

- Explain the purpose and benefits of the Sitecore Experience Platform (XP).
- Describe Sitecore Experience Management (xManagement or XM).
- Describe XM and how it relates to XP.
- Describe how Sitecore defines content.

Discovering the Sitecore Experience Platform



Caroline the Content Author, and Diego the designer, work for Habitat Home—a website using Sitecore XP. Caroline and Diego use the XP features to create and edit content. Their website promotes home appliances, health, gaming and smart-home installation. It includes news articles and guides. Caroline and Diego browse the website as visitors to verify that the content is displayed correctly. The strategic intent of the Habitat Home website is to increase revenue for the online business.

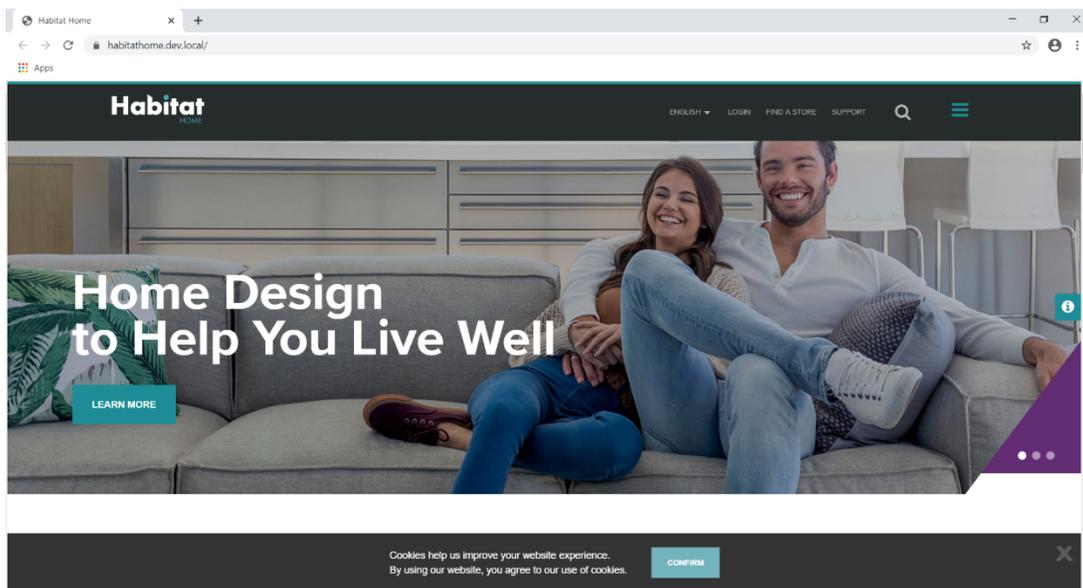
Lab 1.1: Browsing the Website as a Visitor

In this lab, you will browse the Habitat Home website as a visitor and learn about content, functionality, and presentation.

NOTE: This lab takes approximately 10 minutes.

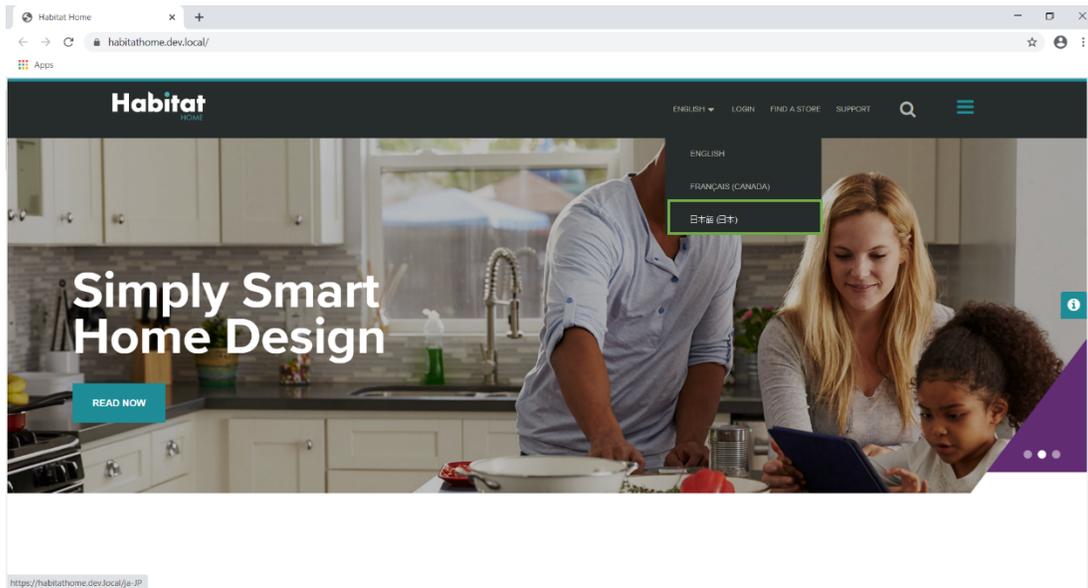
NOTE: Your Instructor will provide you with the URL for the training sample site.

1. Open your **browser**. In the address bar, type *https://habithome.dev.local*, then press the **[Enter]** key to display the Habitat Home website. Alternatively, you can use the shortcut on the Windows Desktop to open the website.

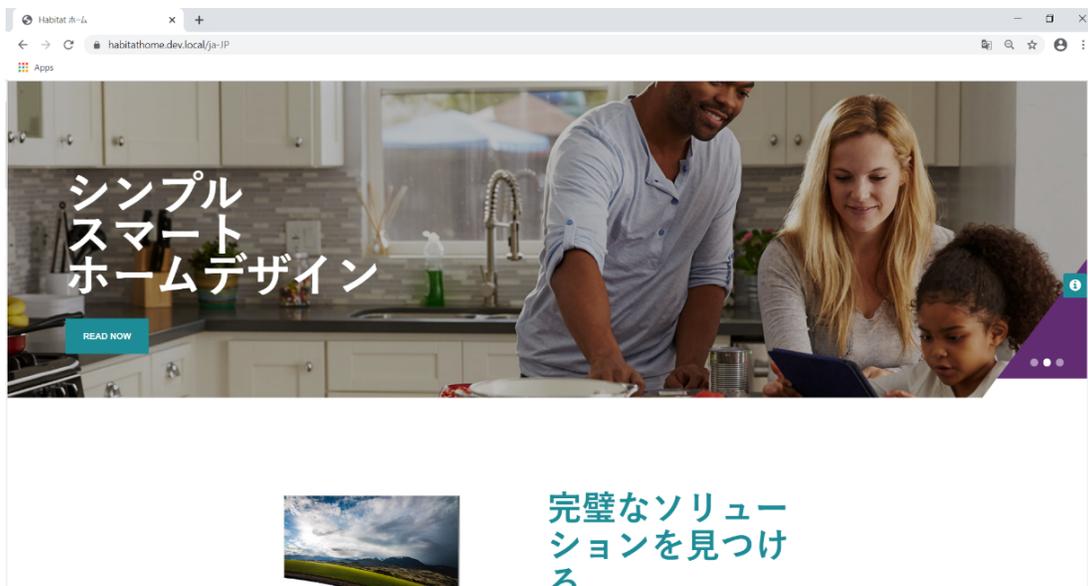


The Home page displays a banner and links to Design Your Connected Home page, which is personalized to the targeted visitors. The image and text you see here are examples of content, which includes text, images and links.

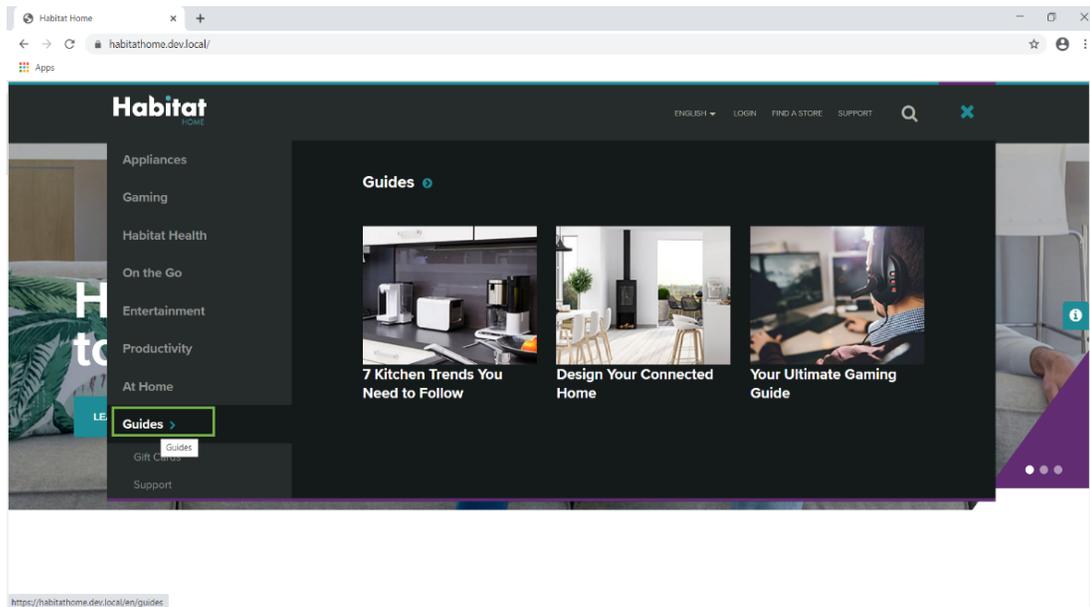
- The top menu is available at all times. Click English to display the language menu and select Japanese from the list.



The site now displays in Japanese. Click the **language menu** again and select **English** from the list. The language changes back to English.



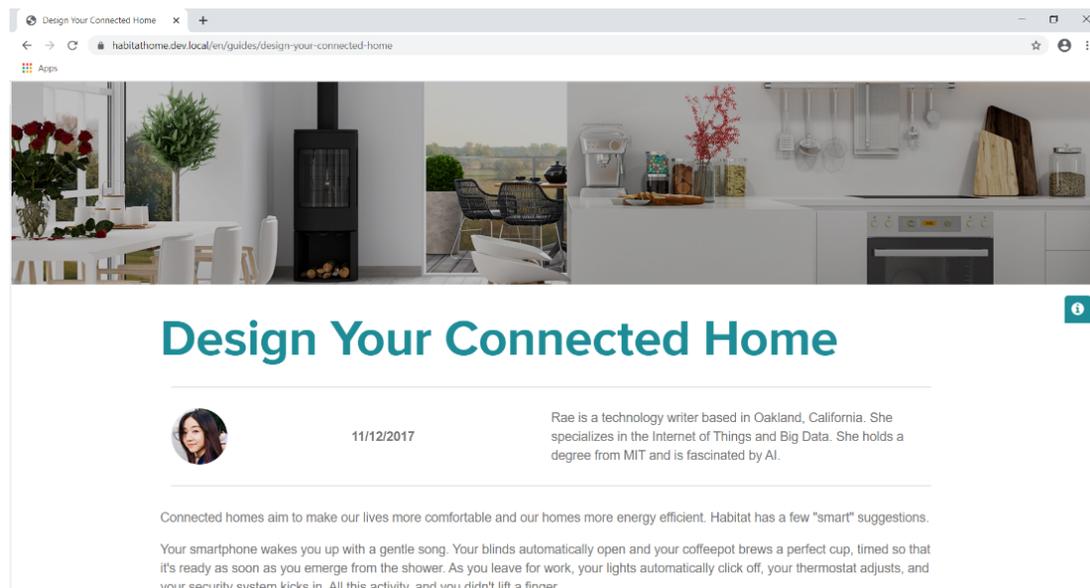
- Click to show the navigation menu, which can take you to other content in the website. Click **Guides**.



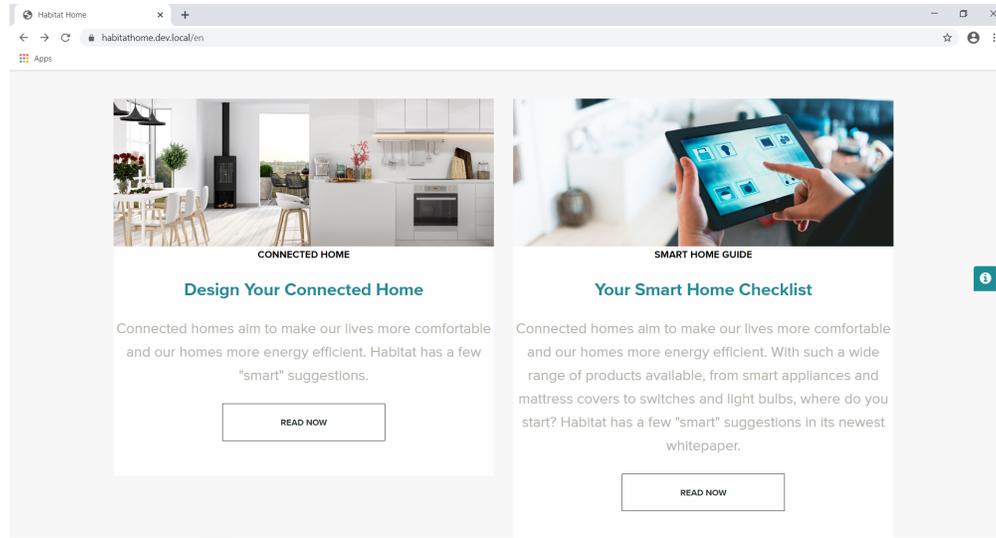
Site navigation, forms, and links are considered functionality. Where and how items display on the web page is presentation.

Next you will look at how content can be reused and repurposed on multiple pages.

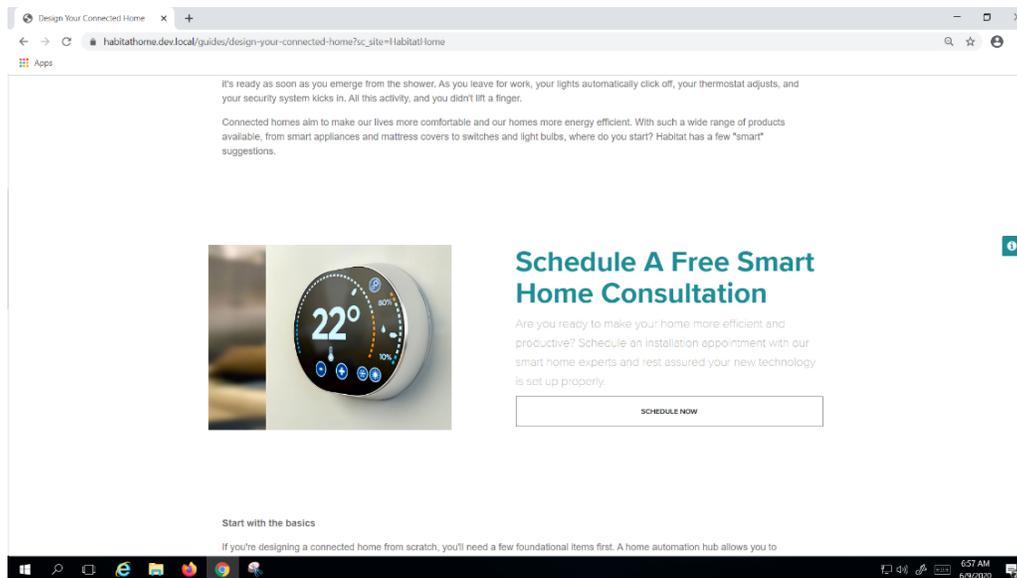
- From the Guides, select the **Design Your Connected Home** article. Note the title and date of the article.



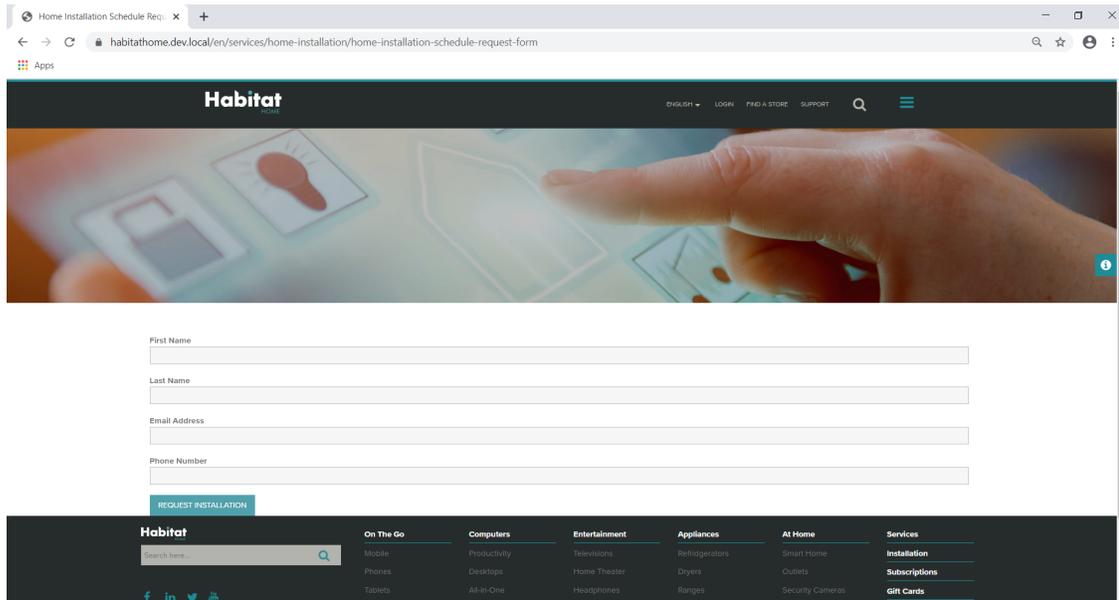
- The article displays on your screen. Look at the URL in the browser's address bar. This is the actual article location. The Home page displays some of this information, but the content you see here is coming directly from the article itself.



- Scroll further down the page and click on **Schedule Now**.



7. Fill out the form and click **Request Installation**.



8. One of the main objectives of the website is to get visitors to sign up for smart home installation consultation; therefore, each guide page will display information about relevant calls to action (such as subscribing to the newsletter or requesting a consultation) or suitable suggestions (such as the fitness program or trainer finder). Return to the Home page.

STOP HERE

Exploring the Launchpad



At Habitat Home, the marketing team uses different access and permission levels for different users. The IT Administrator has identified four user types: Content Author, Marketer, Webmaster and Global Administrator.

Each of these user types sees a slightly different Launchpad when they log in. For example, Caroline, the Content Author, sees all the editing applications on her Launchpad, while Emma, the Marketer, sees all the Experience Marketing applications on her Launchpad.

Lab 1.2: Logging in and Viewing the Launchpad

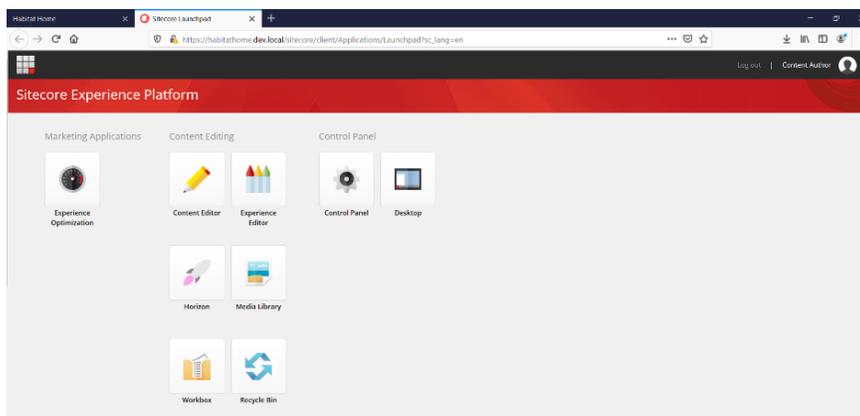
In this lab, you will learn how to navigate to the Login screen, log in to the Sitecore Launchpad, and see different user's access rights.

NOTE: This lab takes approximately 5 minutes.

1. To access the company's Launchpad, in your browser's address bar, type the name of the website followed by */Sitecore* (for example, *https://habitathome.dev.local/sitecore*). Or click the shortcut on Windows Desktop. The Launchpad displays.
2. Log in as Content Author with username: **Content Author**, and password: **c**.

NOTE: Usernames are not case sensitive, but passwords are.

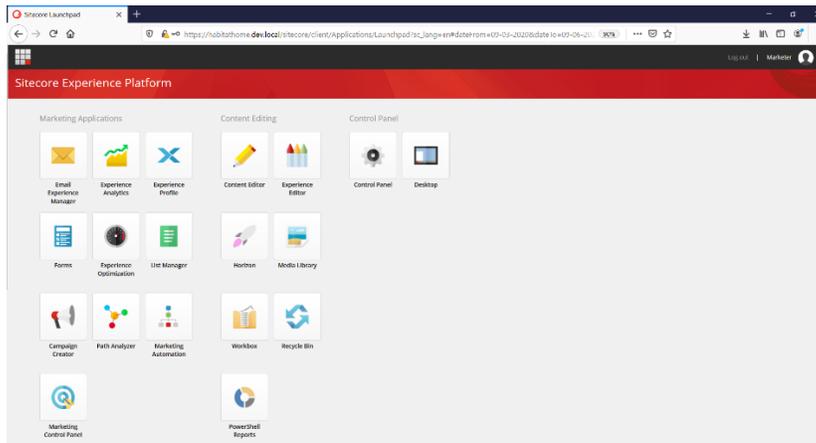
The Launchpad displays applications that are available to the Content Author: the Experience Editor, the Content Editor, Media Library, Workbox and Recycle Bin. Horizon, the next generation of Sitecore Experience Editor, is available with separate installation for Sitecore XP9.3 or later.



3. In the top-right corner, click **Log out** to sign out from the Content Author account.

- Now, log in as a Marketer with username: **Marketer** and password: **m**.

The Launchpad displays applications that are available to the Marketer. Notice the additional applications that the Marketer has access to: Experience Analytics, Experience Profile, Experience Optimization, Campaign Creator, Path Analyzer, Marketing Automation, and the Marketing Control Panel.



- To sign out of the Marketer account, click **Log out** in the top-right corner.

STOP HERE

Using the Control Panel



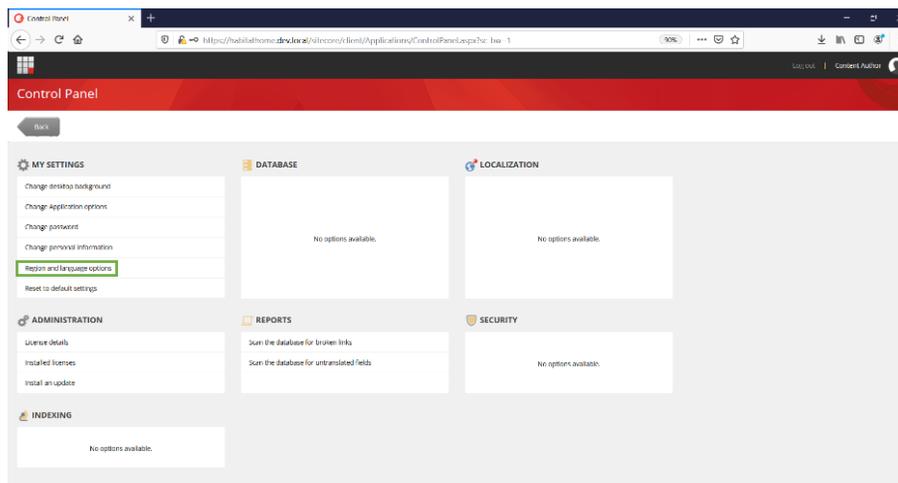
Caroline, the Content Author, logs in to Sitecore for the first time and needs to change her password. Frank informs Caroline that since Habitat Home's Sitecore solution is not integrated with Microsoft Active Directory (AD), she can use Control Panel to change her password as well as her region and language.

Lab 1.3: Changing Region/Language Settings

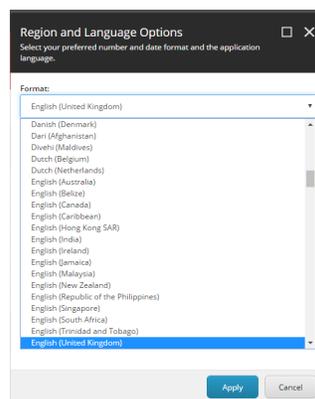
In this lab, you will log in as Content Author, navigate to the Control Panel, change the password, log out to try the new password, and then change it back.

NOTE: This lab takes approximately 3 minutes.

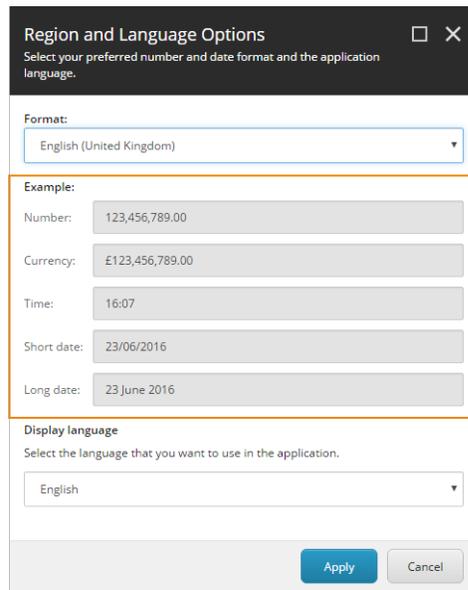
1. Log in as Content Author with username: **Content Author**, and password: **c**.
2. From the Launchpad, click **Control Panel**.
3. From the Control Panel, in the My Settings section, select **Region and language options**. The Region and Language Options dialog box displays.



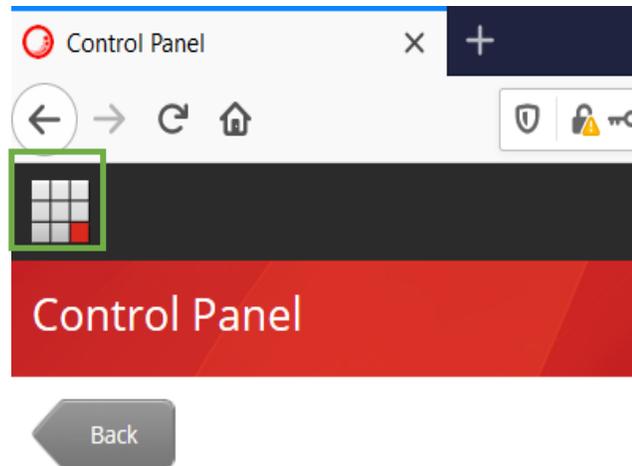
4. In the Region and Language Options dialog box, use the Format drop-down menu to select **English (United Kingdom)**.



- The Example displays how the format will look with the new language setting. Click the **Cancel** button.



- In the top left corner, click the **Launchpad** icon.



- Click **Log out** to sign out from the Content Author account.

STOP HERE

Questions

Q1: What part of Sitecore does xManagement (XM) represent?

Q2: What is an item?

Q3: How do you access the login screen for Sitecore?

Q4: Which application is used for updating regional and language preferences?

Apply What You Learned

When you begin to work on your Sitecore instance:

- Browse your new website as if you were visiting the website for the first time.
- Look at the structure of the website: headings, navigation, page layouts, and content. Note which content has been reused on different pages.
- Find out whether or not you are using Active Directory.
- Log in to your Launchpad.
- Change your password.
- View and list the applications that you have access to.
- Set up your regional and language preferences.

Review

In this module, you learned about Sitecore XP and the xManagement features. You learned about the Launchpad, access rights, how to log in and how to set up your region and language preferences. You also learned how to change your password if Active Directory is not integrated.

Module 2: Using the Experience Editor

This module introduces the Experience Editor. You will use the Experience Editor in Editing mode to create, edit and modify website content. In Designing mode, you will create a new version of an item, and modify the look and feel of the page. Finally, you will be introduced to presentation and where presentation is set up in the Experience Editor.

By the end of this module, you will be able to:

- Summarize the use of the Experience Editor.
- Use the Experience Editor to modify content and presentation.
- Preview content and use the Device Simulator.

Editing in the Experience Editor



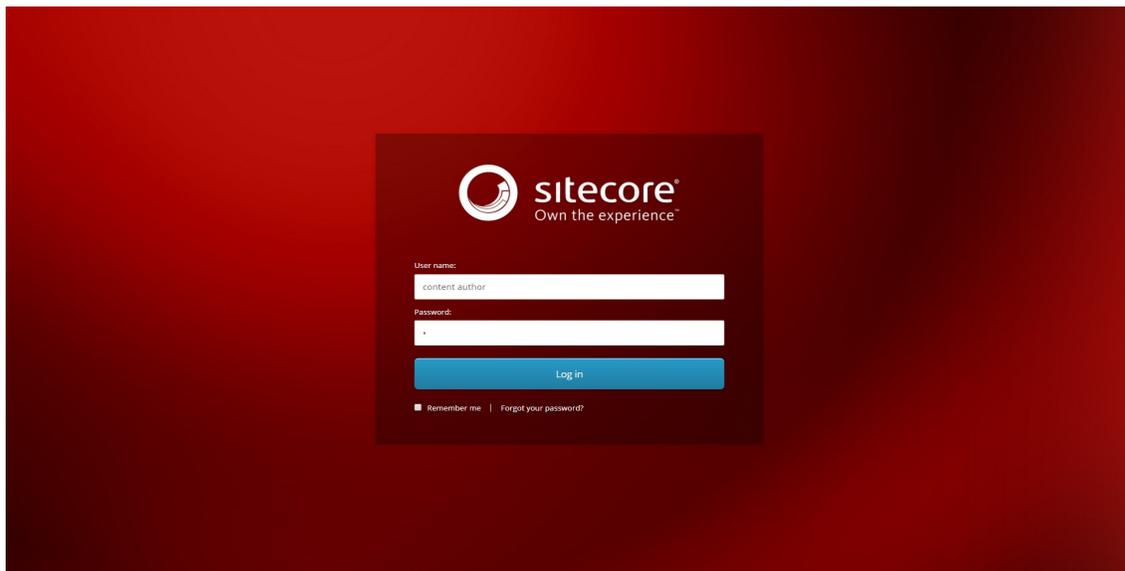
The Content Author begins creating new items in the Experience Editor. She adds and edits a guide article item, noticing how Sitecore automatically locks the item. As she finishes editing, she unlocks the item to make it available to other users.

Lab 2.1: Creating and Editing a Guide Article

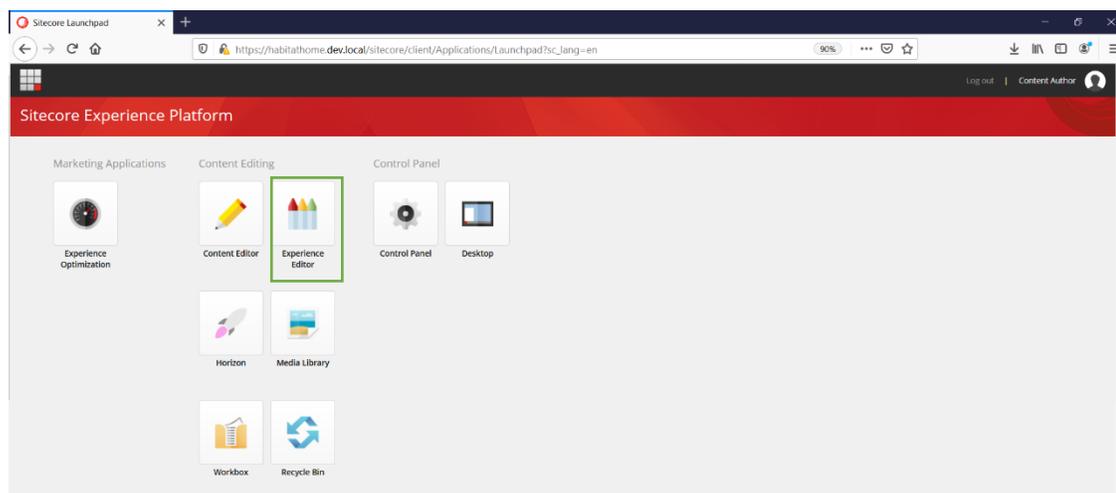
In this lab you will explore the Experience Editor and discuss editing mode. You will then create new content, a new guide article.

NOTE: This lab takes approximately 20 minutes.

1. On the Sitecore login screen, log in as Content Author, with username: **Content Author**, and password: **c**. The Content Author has permissions to edit content.

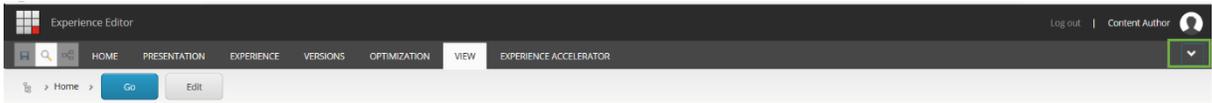


2. The Launchpad displays. To start editing click the **Experience Editor**. The Experience Editor displays.

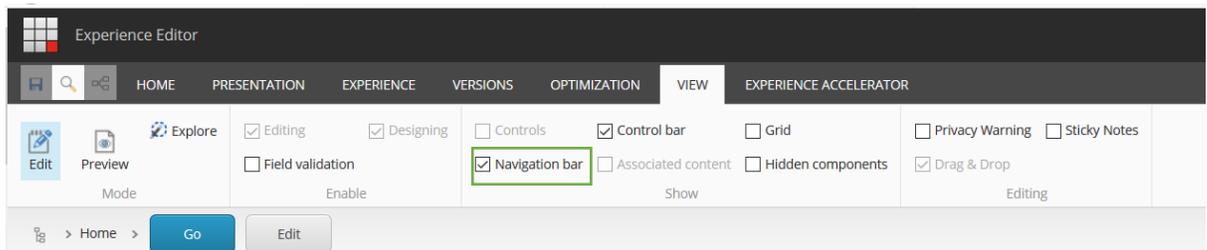


The Experience Editor is the simplest of the editing tools that Sitecore provides. The Experience Editor is a WYSIWYG editor. It allows you to easily make changes to items directly on the page. All the items that are visible on the page including text, graphics, logos, and links can be edited.

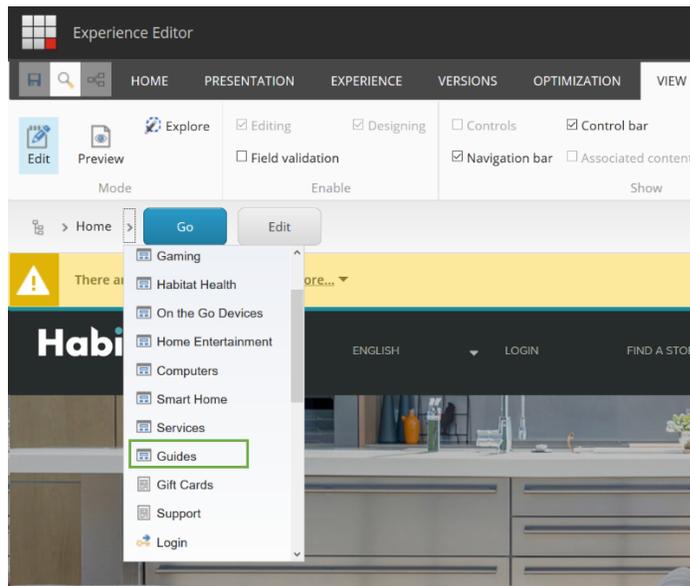
- By default, the ribbon is collapsed. On the top-right corner of the menu, click the **toggle ribbon arrow** to expand the ribbon.



- On the ribbon, select the **VIEW** tab and then select the **Navigation bar** check box, to turn on the Navigation bar.



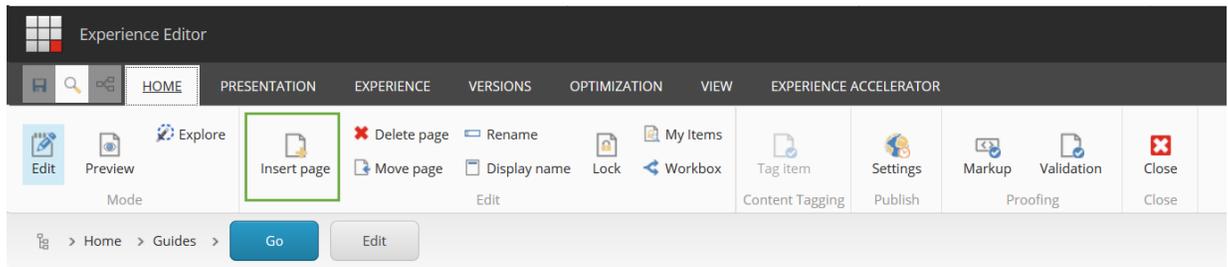
- Use the Navigation bar, click the **Home arrow** and select **Guides** from the list.



- Click **Go** to navigate to the Guides page.

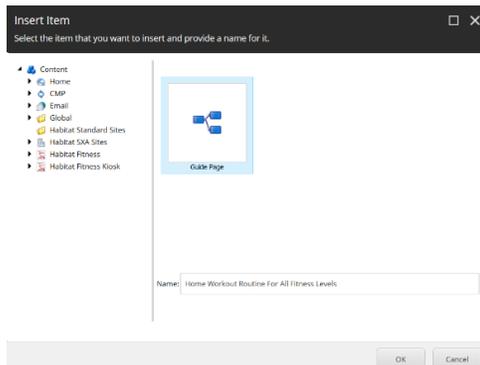
NOTE: Hyperlinks can be used to navigate link text or images when in Editing or Designing mode. Hold the **[Ctrl]** key while clicking the link text or image.

- Next, create a new guide article. Select the **HOME** tab, then choose **Insert page**.



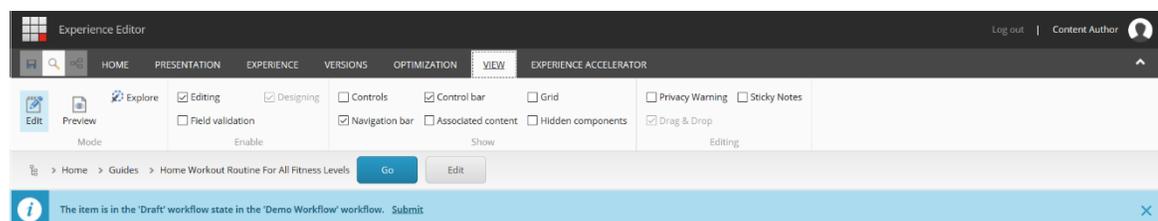
NOTE: The type of item that you can create varies depending on where you are on the website. Item type availability is also based on user permissions.

- The Insert Item dialog box displays. Select the **Guide Page** template.



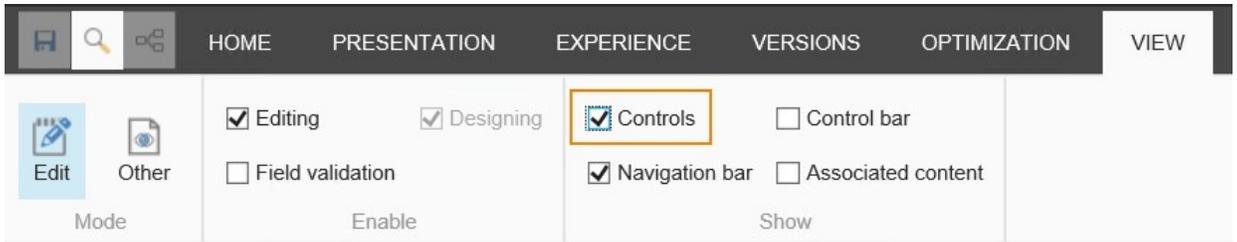
- In the **Name** field, type *Home Workout Routine For All Fitness Levels* and then click **OK**. The new "Guide Page" item appears.

- Select the **VIEW** tab, and then selected the **Editing** check box (if it is not already selected) to turn on editing mode.



NOTE: Before you can edit website content, Editing mode needs to be turned on.

- In the **VIEW** tab, select the **Controls** check box. In Editing mode, with controls selected, all editable objects on the page are visible at once.



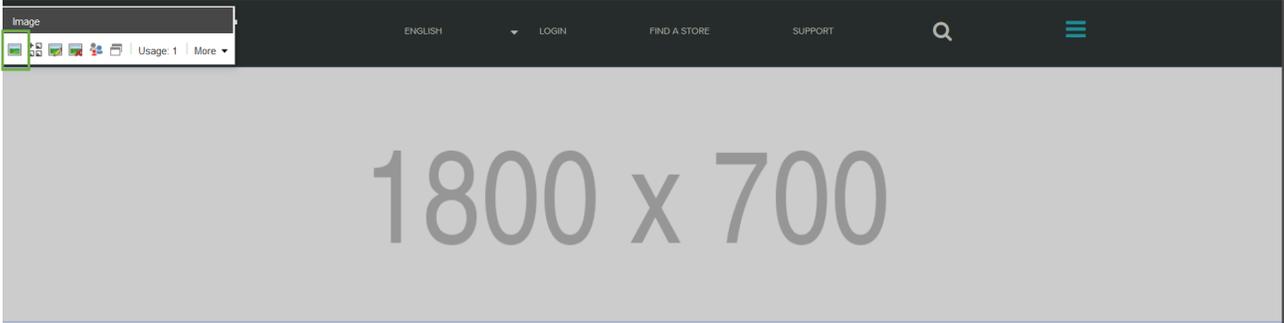
NOTE: Objects can be edited with Controls turned off. On the page hover over a text field. The text field displays with a dotted line. These are editable objects.

NOTE: When Editing is turned on, text and images that act as links may not function properly. Hold the **[Ctrl]** key down while clicking these links to navigate.

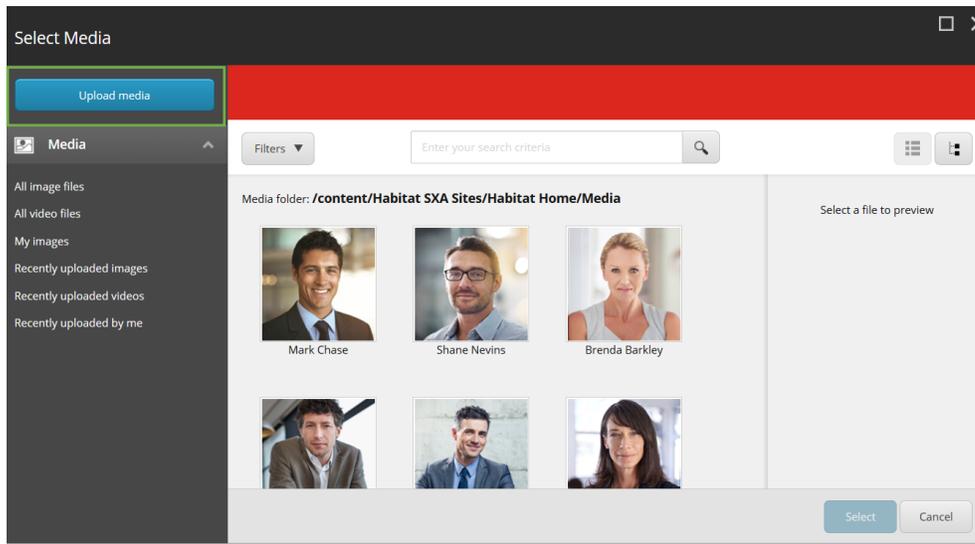
To edit the item:

The new "Guide Page" item has been created. Notice that many fields still need content. Empty text, number or date fields will display the message, "No text in field". Images that have not been assigned will display a generic image icon. These labels and icon will only appear in editing mode, not in preview or on your live site.

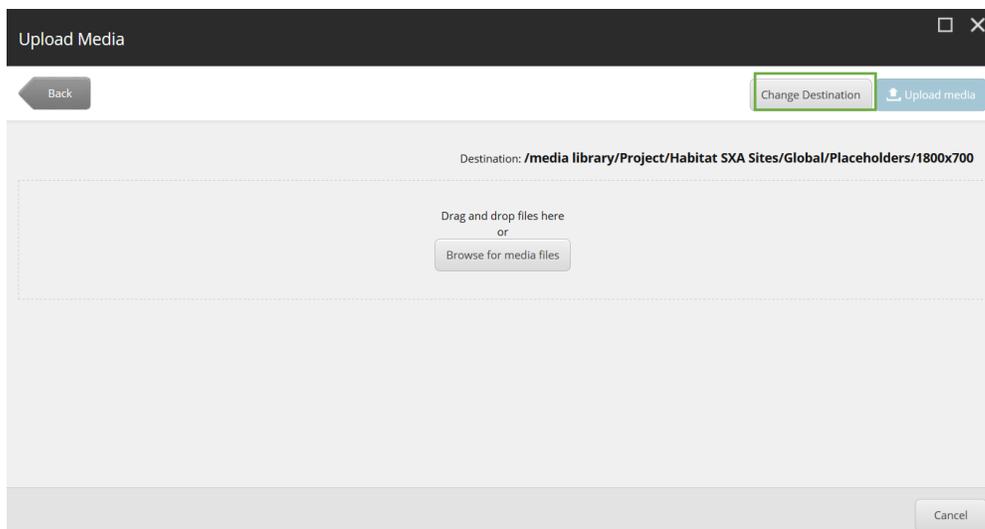
- Click **Image** on the floating toolbar, then click the **button** to choose an image.



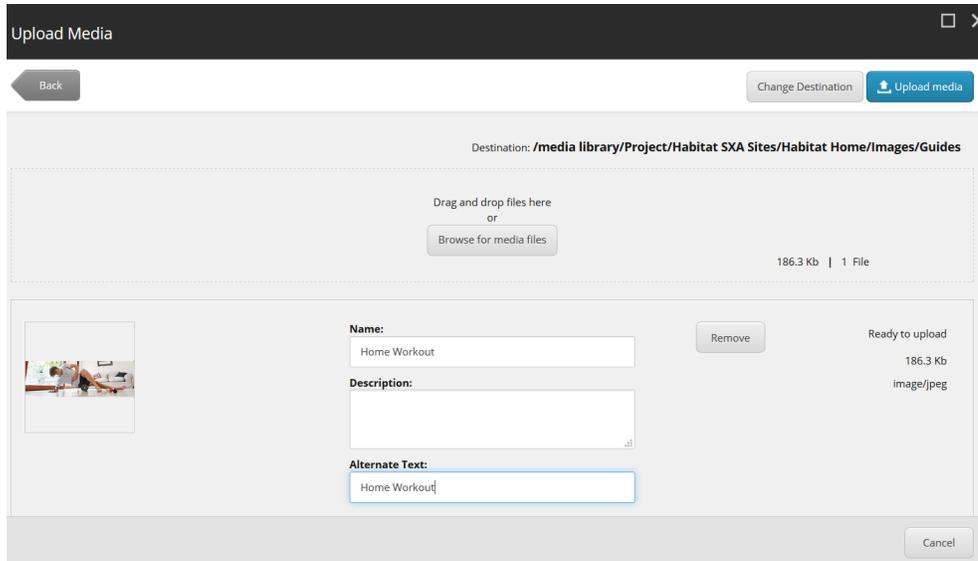
- In the Select Media dialog box, click the **Upload media** button to upload a new image.



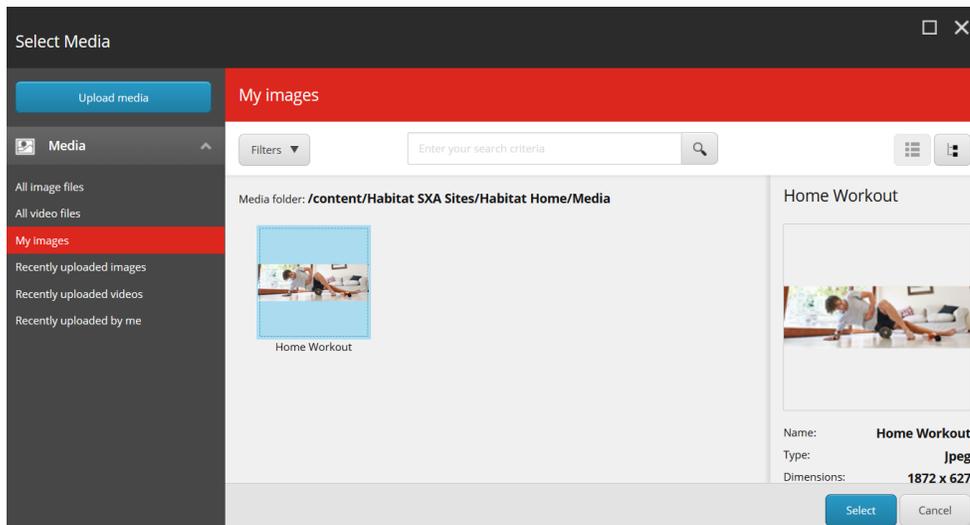
- In the Upload Media dialog box, click the **Change Destination** button and select **Media>>Habitat Home>>Images>>Guides**.



- Click **Browse for media files** and select **c:\Training\Student Resources\Home Workout.jpg**. Enter *Home Workout* in the Alternate Text field, then click **Upload media** to upload the image to the selected location.



- Navigate back to the Select Media dialog. Click **My images** and choose the **Home Workout** image you just uploaded. Click **Select**.



6. Select the **Publish Date** field, on the floating toolbar, then click on the **calendar** icon. The Select a Date dialog box displays the current date and time. Click **OK**.

Home Workout Routine For All Fitness Levels



7. Click the **Title** field, change the title to *A Simple Home Workout Routine for All Fitness Levels*. The updated title displays.



8. Click the **Introduction** field. The floating toolbar displays.
9. Click the **pencil** icon. The Rich Text Editor (RTE) displays.

The RTE provides most of the commonly used functions from desktop editors like Word. Using the RTE, you can write and format text, create tables, and much more.



10. From the **student resources** folder, open the Word document, "A Simple Home Workout Routine."

Home Workout

A Simple Home Workout Routine for All Fitness Levels

Introduction field:

If the idea of a home workout makes you yawn, think again! When executed correctly, using just your body weight can give you a run for your money. So, whether the gym isn't your thing or you're short on time, clear out a space in the living room and prepare to sweat.

The bodyweight moves we've detailed below can be scaled for beginner, intermediate, and advanced exercisers, so start where you feel ready and progress from there.

Content field:

1 Squats

- Stand with your feet about shoulder-width apart and slightly turned out with your weight in your heels.
- Hinge your hips to sit your butt back and bend your knees until your thighs are parallel to the ground.
- Drive through your heels to stand back up straight. Squeeze your butt and keep your core tight as you stand.

2 Reverse Lunges

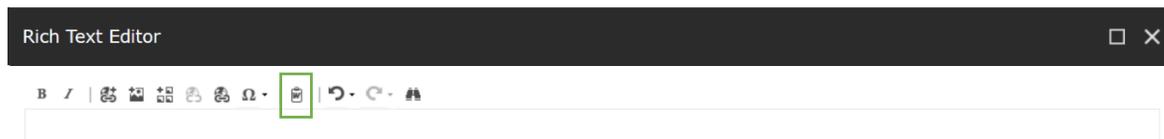
- Start standing with your feet about shoulder-width apart.
- Step backwards with your left foot, landing on the ball of your foot and bending your knees to create two 90-degree angles.
- Push through your right heel to return to standing.
- Repeat on the other side.

NOTE: In preparation for creating a new guide article for the website, the Content Author typed up the story in a Word document. You need to open the Word document on your computer and locate the file on your computer to open it.

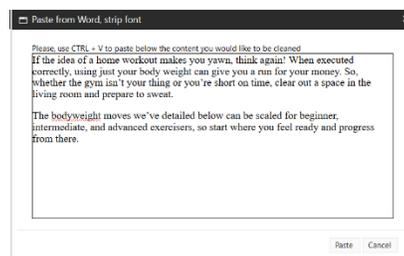
11. Copy the Introduction paragraph by selecting the text and then pressing **[Ctrl]+ [C]** keys.

12. In the Rich Text Editor (RTE), select the **clipboard W** icon, which displays the **Paste from Word** strip font box. This feature allows the RTE to clean the formatting from Word and allows the website to format the text.

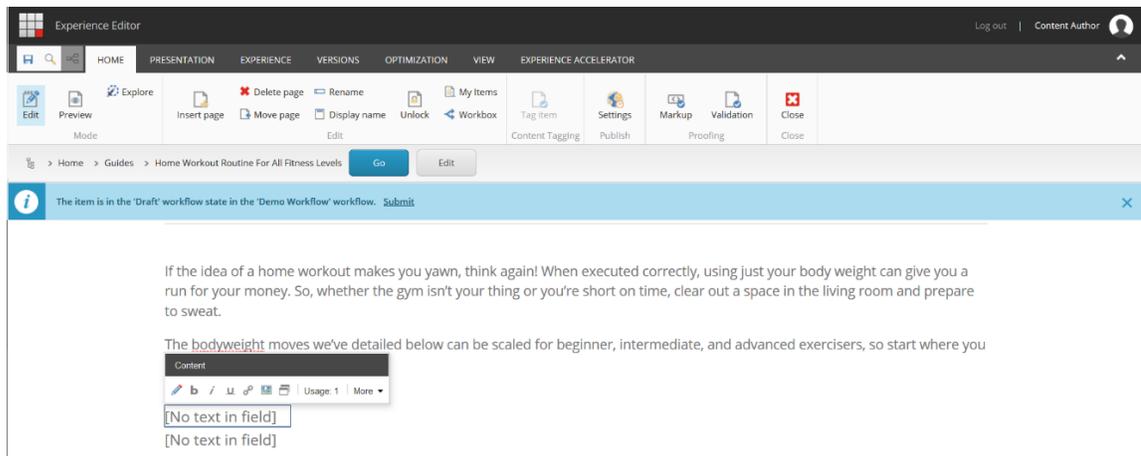
13. In the **Paste from Word** strip font box, press **[Ctrl]+ [V]** keys to paste the text.



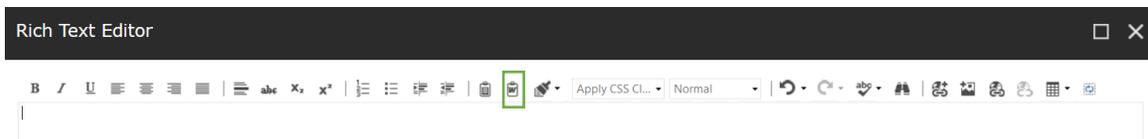
14. Click **Paste** to display the text in the RTE.



- Click **Accept** to close the RTE. The change displays in the Guides Introduction field. Now, add a new paragraph and include a link to another page to get started.
- Select the **Content** field to display the floating toolbar.

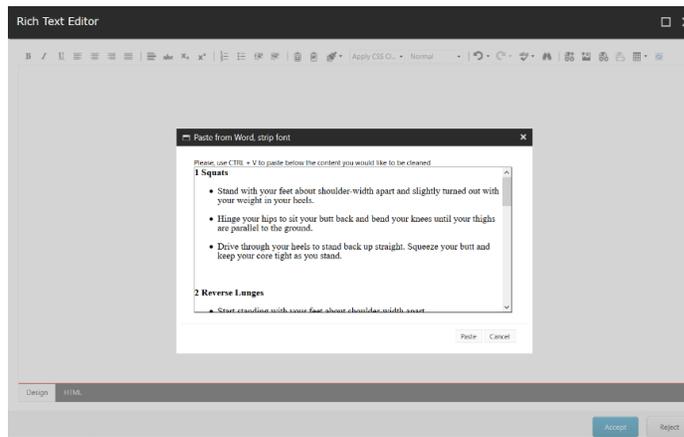


- Click the **pencil** icon to display the RTE.
- Copy the Body paragraph from the Word document by selecting the text and then pressing **[Ctrl]+ [C]** keys.
- In the Rich Text Editor (RTE) select the **clipboard W** icon. The **Paste from Word, strip font** box displays.



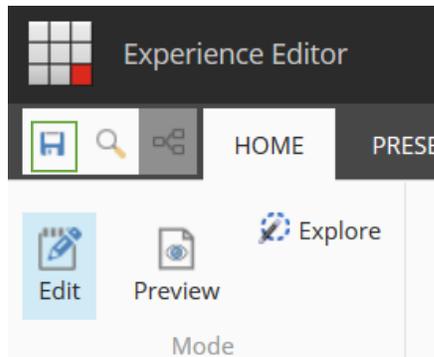
- In the **Paste from Word, strip font** box, press **[Ctrl]+ [V]** keys to paste the text.

21. Click **Paste** to display the text in the RTE.



22. Click **Accept** to close the Rich Text Editor. The change appears in the **Content** field.

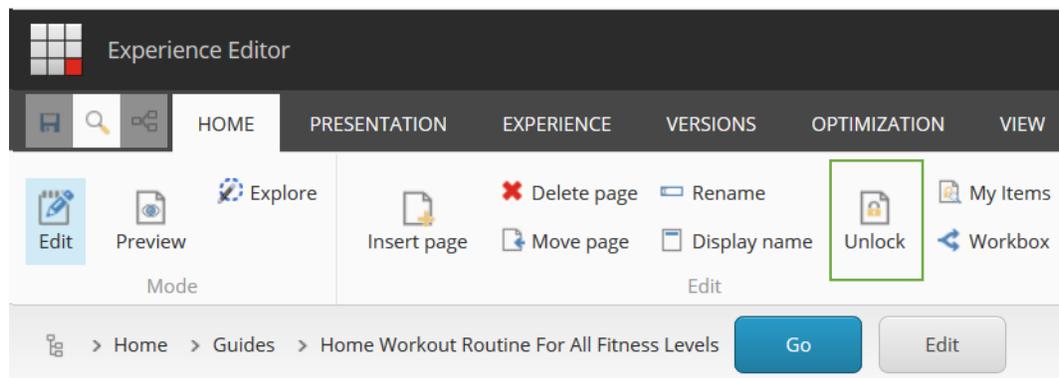
23. To save your work, click the **floppy disk icon**.



Use the **Save** command on the ribbon to save your changes.

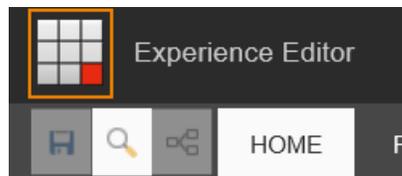
NOTE: Sitecore does not automatically save changes.

24. On the HOME tab, click **Unlock**. The page can now be edited by another person.



When all edits are complete, unlock the page.

25. Click the **Launchpad** button, then click **Log out** to exit.



STOP HERE

Designing in the Experience Editor



Using the Experience Editor, the front-end developer can quickly change page designs. He creates a new version of the **Gear** item to try out the designing functionality in the Experience Editor.

Lab 2.2: Designing in the Experience Editor

In this lab, you will use the Experience Editor Designing mode to make changes to the look and feel of a page. You will add a banner component, move the About Us content, and add and remove components from the page.

NOTE: This lab takes approximately 10 minutes.

To add a new page version:

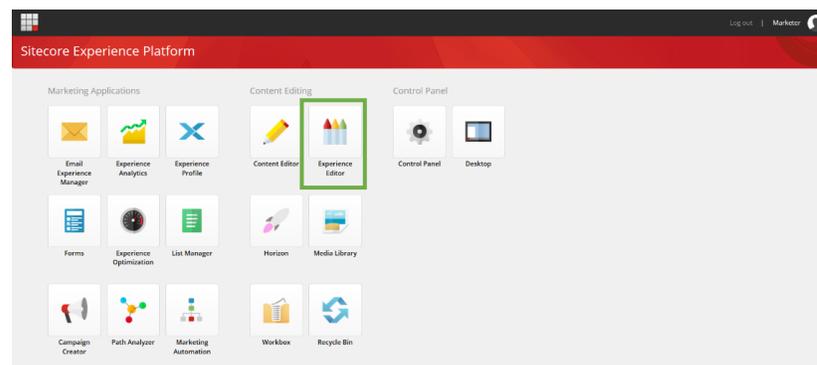
1. On the Sitecore **login** screen, log in as the Marketer with username: **Marketer**, and password: **m**. The Marketer has permissions to use Designing mode.

NOTE: Access to Experience Editor Designing can be granted to any user.

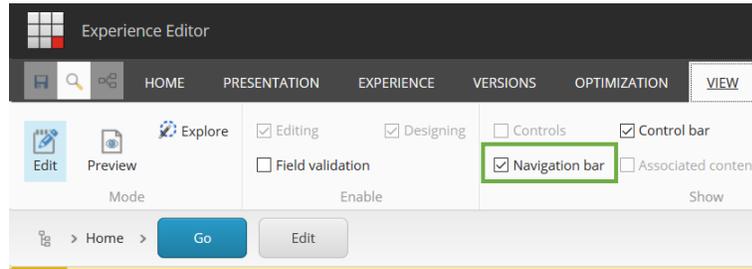


The image shows the Sitecore login interface. At the top left is the Sitecore logo with the tagline "Own the experience". Below the logo are two input fields: "User name:" containing the text "marketer" and "Password:" with a single character "m" and a password toggle icon. A blue "Log in" button is positioned below the password field. At the bottom left, there are two links: "Remember me" (with an unchecked checkbox) and "Forgot your password?".

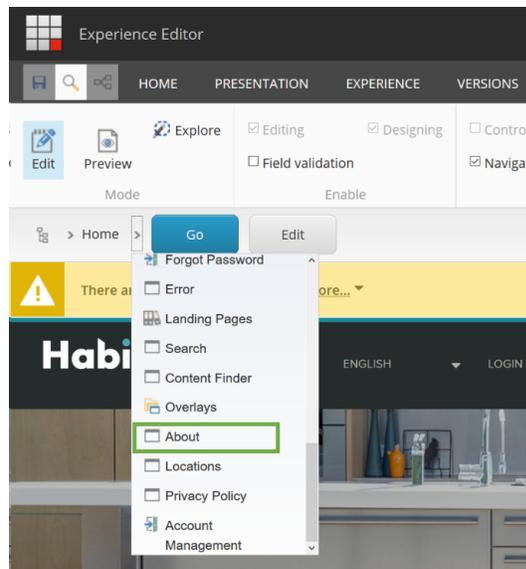
2. The Launchpad appears. Click the **Experience Editor** icon.



3. Select the VIEW tab, then select the **Navigation bar** check box to display the Navigation bar.

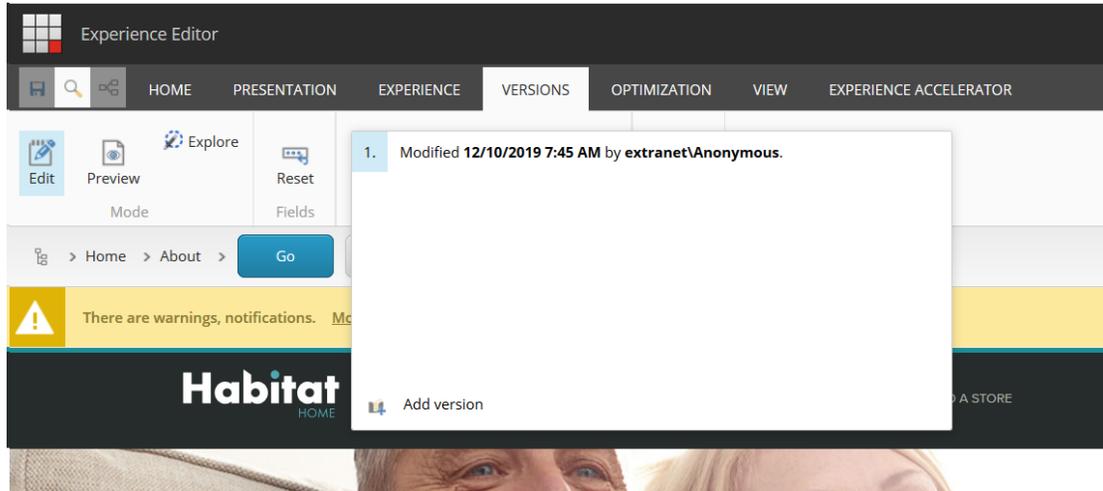


4. To navigate to the About page, use the Navigation bar. Click the **Home arrow**. From the list select **About**, then click the **Go** button.

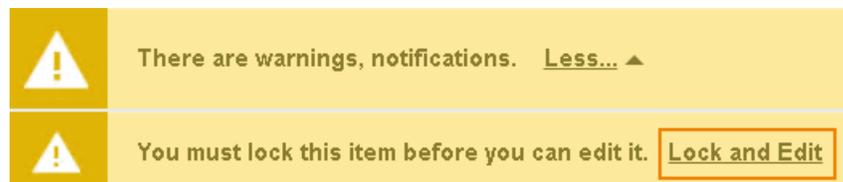


- On the ribbon, select the **VERSIONS** tab and click **version 1** to display the drop-down.

We are going to create a new version of the About page based on version 1. **Do not** click the *Add version*. We'll create version 2 by using the workflow associated with the item.

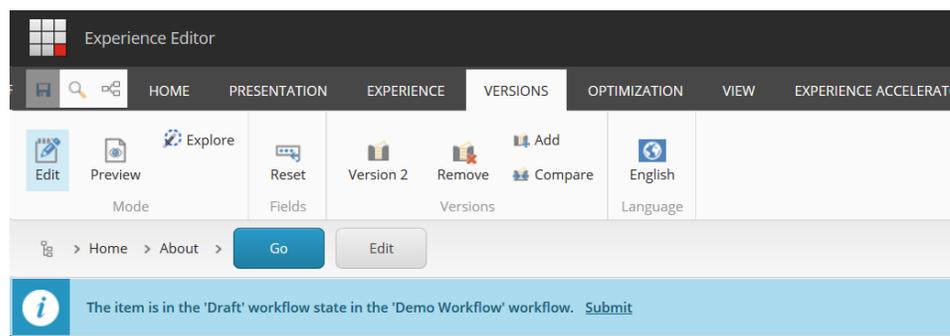


- Click **More...** to expand the yellow notification bar, then click the **Lock and Edit** link to lock the page.



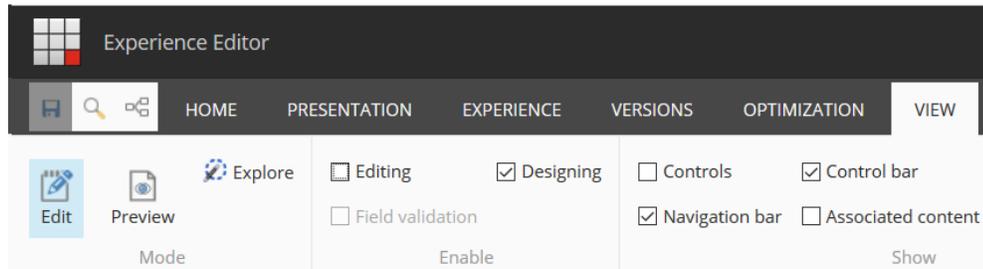
NOTE: Before a page can be edited it must be locked. The **About** item is in a final workflow state. Workflows are Sitecore's content approval process. When an item in a final workflow state is locked, a new numbered version is created.

- The **VERSIONS** tab now displays version 2. Noticed the item is in “Draft” state of the “Demo Workflow.” The new version has been added.



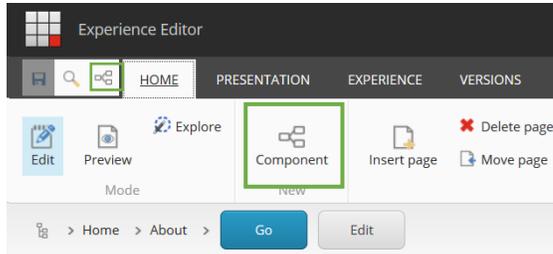
You can also use the Add command on the VERSIONS tab to add a new numbered version manually

- On the ribbon, select the **VIEW** tab, then select the **Designing** mode check box and deselect **Editing** (if selected).



To add a component to the page:

1. On the ribbon, click the **Add a new component** icon or the **Component** command.



+ Add Here buttons display anywhere a component can be added on a page. These mark placeholders on the page—named areas where components can be added, moved, or removed.

2. Below the Promo component, click the + **Add Here** button. The Select a Rendering dialog box displays.



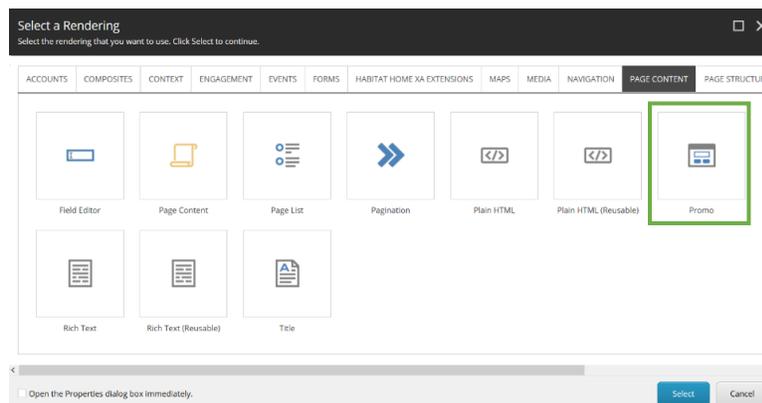
Habitat makes life easier for you e
electronics and appliances have :
innovative "smart" features to help
fuss. Elegant designs blend seam
well, live simply, stay connected. `

[No text in field]

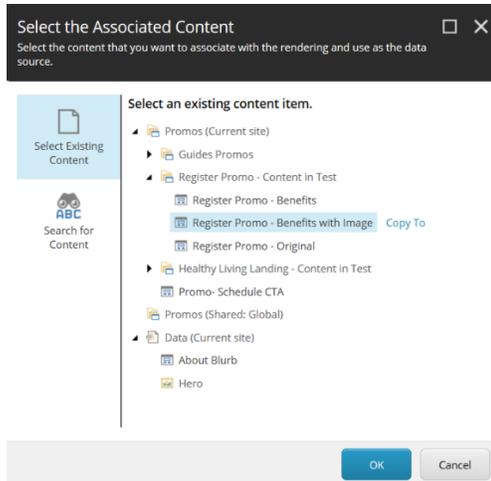


3. In the Select a Rendering dialog box, under the PAGE CONTENT tab choose **Promo**, and then click **Select**. This will display the Select the Associated Content dialog box.

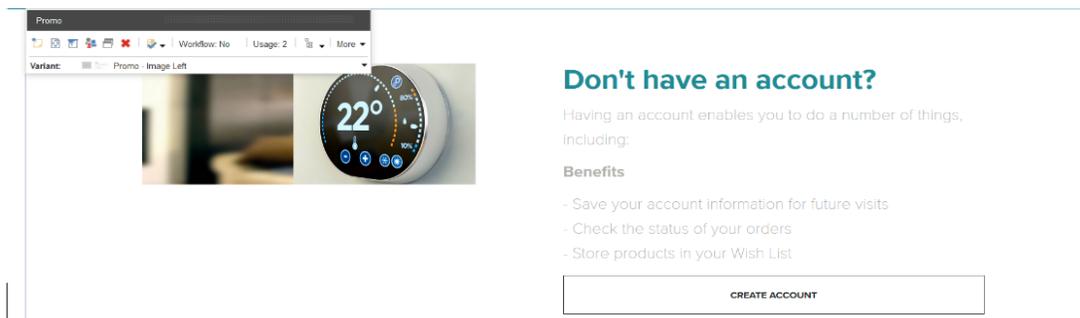
NOTE: Associated content is explained in more detail in Module 4.



- From the “Select an existing content item” list, choose **Register Promo – Benefits with image** and click **OK**.



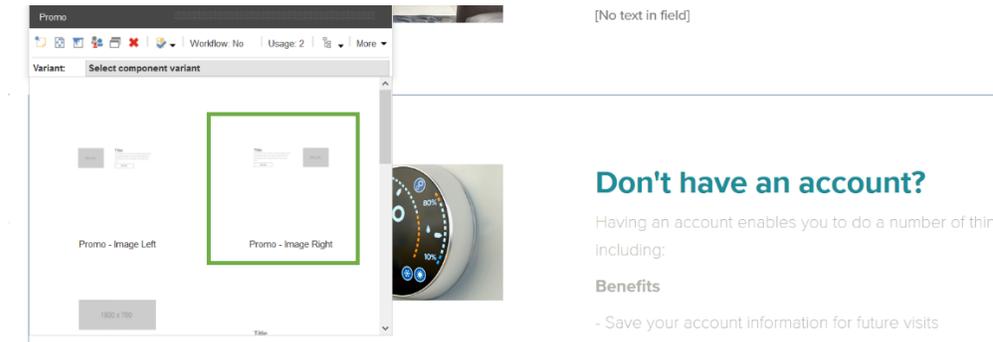
- The Promo component with the content “Register Promo-Benefits with image” floating toolbar display.



Change the style variant of the component:

Components, presentations, or styles can be modified depending on the designs implemented by Developers for reusability purpose.

1. On the Promo component floating toolbar, select **Promo- image right**.



2. Notice that the Promo component image is updated and now displays on the right side.

Don't have an account?

Having an account enables you to do a number of things, including:

Benefits

- Save your account information for future visits
- Check the status of your orders
- Store products in your Wish List

[CREATE ACCOUNT](#)



Move component:

Components can also be moved within the allowed placeholders. Try it on your own.

1. Move the **Register Promo-Benefit with image** component to right below the page hero banner.



Don't have an account?

Having an account enables you to do a number of things, including:

Benefits

- Save your account information for future visits



2. Hint: look for the **Move** icon on the floating toolbar.

Move to here buttons will appear anywhere on the page this component is allowed.

3. Finally undo the move. We preferred the previous design.
4. **Save** your changes.

STOP HERE

Lab 2.3: Previewing in Sitecore

In this lab, you will preview the changes that have been made to the site. You will also use the Sitecore Device Simulator.

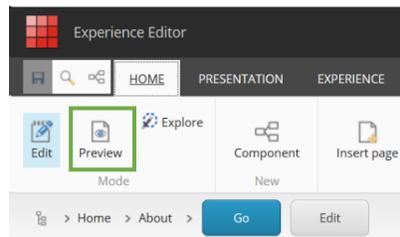
NOTE: This lab takes approximately 8 minutes.

To preview in Preview mode:

1. Log in as a Content Author with username: **Content Author**, and password: **c**.



2. On the Launchpad, click the **Experience Editor** icon.
3. On the ribbon, select **HOME**, then **Other**, and then choose **Preview**.

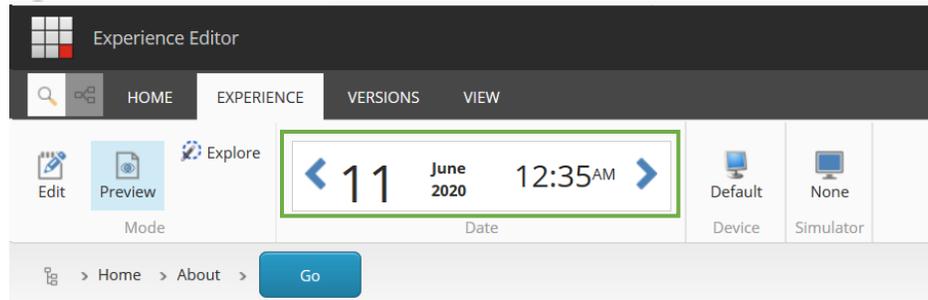


Preview mode lets you preview your content without having to publish it first.

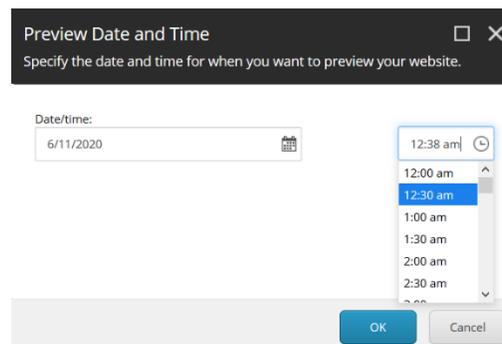
4. Using the links at the top of the page, navigate to the About page.

When you preview a site, you do not need to use the Navigation bar. Instead you should preview it as if you were a normal site visitor.

- On the ribbon, select the **EXPERIENCE** tab, then click the **date**.



- Use the Preview Date and Time dialog box to change the date and time so that you see all versions of the item: version 1 (the original), and version 2 (from today with the changes you just made). To apply the date change, click **OK**.



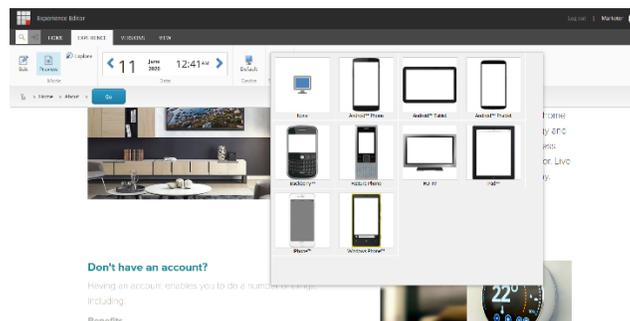
NOTE: If you are unsure of the dates each version becomes publishable, click **Settings** on the Home tab to see the publishable dates for each version.

- Verify that you see both numbered versions of the **About** item.
- When finished previewing, set the date to tomorrow's date to view the latest version.

To preview using the Device Simulator:

The Device Simulator enables you to preview your website in a simulation of several different devices, such as an iPhone, iPad, Android Phone, and Blackberry.

1. On the ribbon, select the **EXPERIENCE** tab, then choose **None**.
2. On the EXPERIENCE tab, click the **Simulator** command (it currently says None).
3. On the drop-down menu, select **iPhone**.

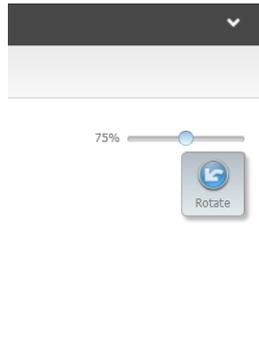


The Device Simulator mimics devices. The preview is not a pixel-perfect rendition of the website as it appears on each device, but it gives you a good indication of how the device presents the website and allows Content Authors to quickly see how pages look on mobile devices.

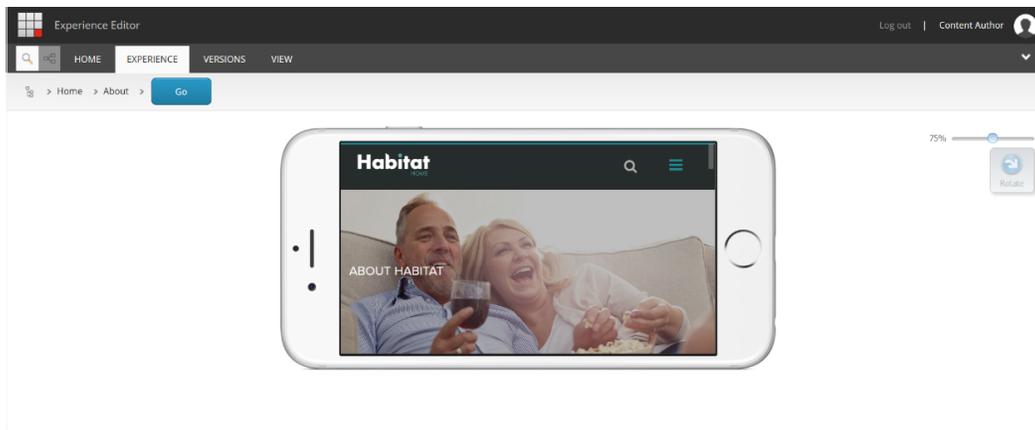
4. Use the scroll bar inside the iPhone to **scroll down** on the page and see a representation of how this page should look on an iPhone.



- In the top-right corner of the Editor, click **Rotate**. This will put the page in landscape view.

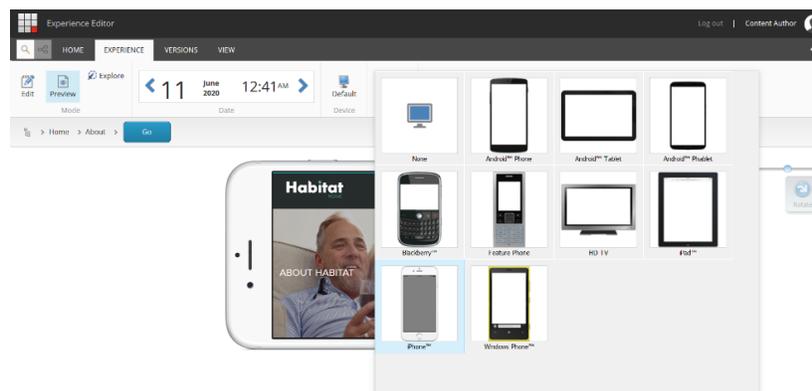


- On the ribbon's EXPERIENCE tab, on **Simulator**, click **iPhone**.



To turn off the simulator, select the **iPhone** command on the ribbon.

- On the drop-down menu, select **None**.



- Return to the Launchpad and **Log out**.

STOP HERE

Questions

Q1: What function must you enable to edit your website content in the Experience Editor?

Q2: What types of fields can you modify in the Experience Editor by default?

Q3: When are changes in the Experience Editor displayed on the Live website?

Q4: What is the purpose of locking?

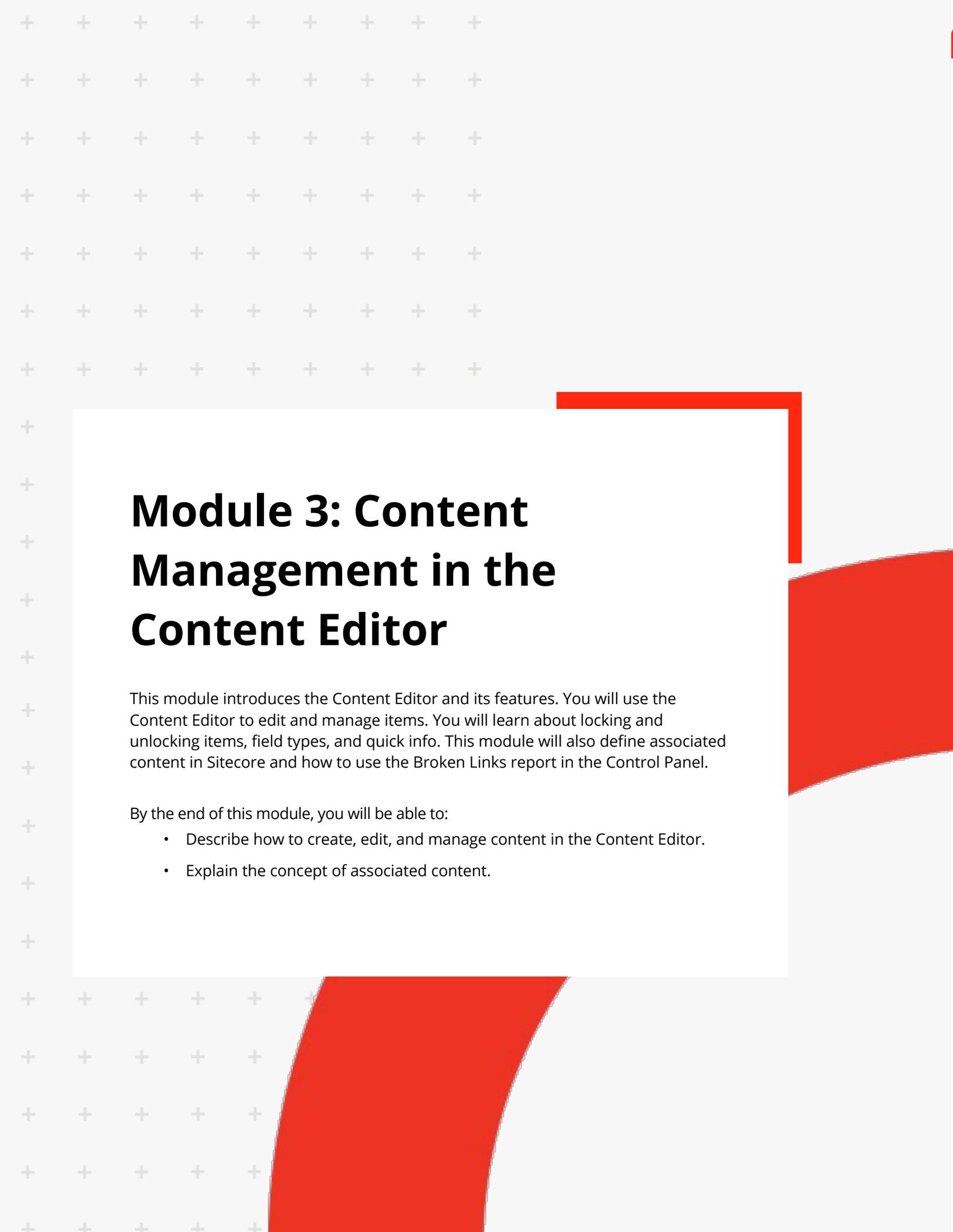
Apply What You Learned

When you begin to work on your Sitecore instance:

- Identify what type of permissions you have. Can you use both Editing and Designing modes?
- Create and edit content in the Experience Editor.
- Check to see if the default item locking strategy is in place or if it has been modified.

Review

In this module, you learned how to create, edit, and modify website content in the Experience Editor in Editing mode. In the Experience Editor's Designing mode, you modified the look and feel of the page. You also learned how to create and delete item versions. Finally, you saw how to preview content before it goes live.



Module 3: Content Management in the Content Editor

This module introduces the Content Editor and its features. You will use the Content Editor to edit and manage items. You will learn about locking and unlocking items, field types, and quick info. This module will also define associated content in Sitecore and how to use the Broken Links report in the Control Panel.

By the end of this module, you will be able to:

- Describe how to create, edit, and manage content in the Content Editor.
- Explain the concept of associated content.

Introducing the Content Editor



The marketing team at Habitat Home gets together to learn about the Content Editor. They figure out how and when they will be using the application. They also learn how to view detailed information about an item and what an item looks like in the Content Editor.

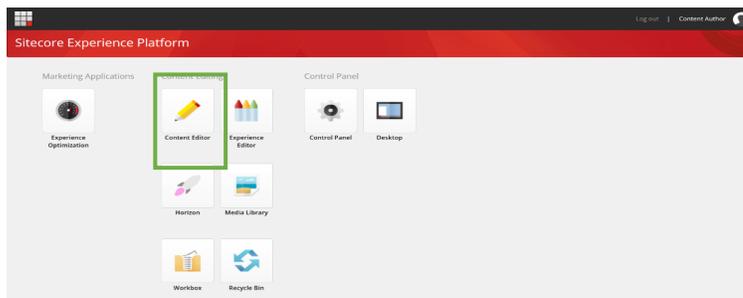
Lab 3.1: Introducing the Content Editor

In this lab, you will learn about the Content Editor and its functionality. The Content Editor is a more advanced editing tool than the Experience Editor.

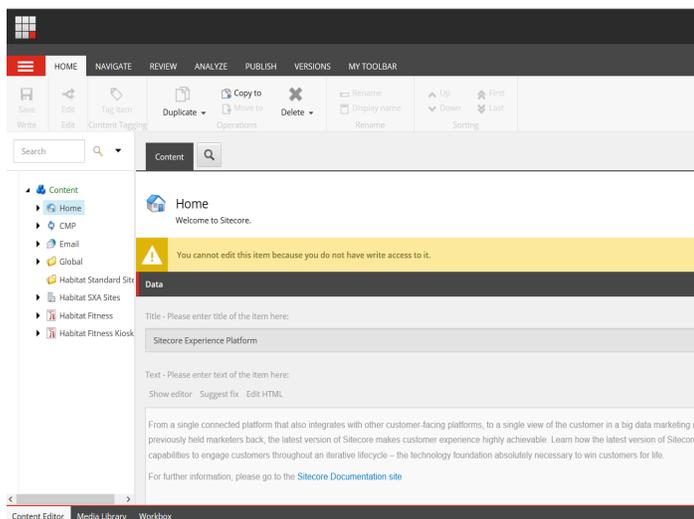
1. Log in as the Content Author with username: **Content Author**, and password: **c**.



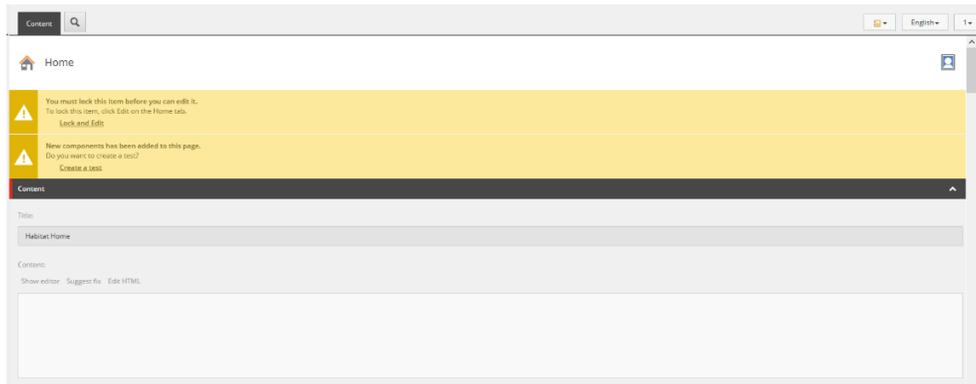
2. In the Launchpad, click the **Content Editor** icon.



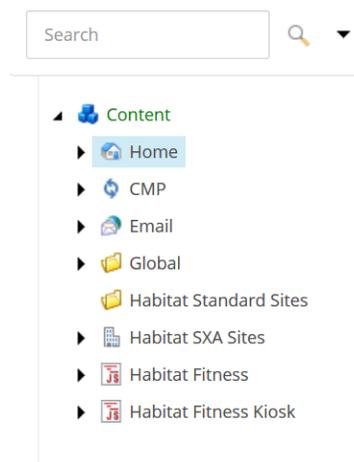
3. The ribbon in the Content Editor makes contains different tabs than in the Experience Editor.



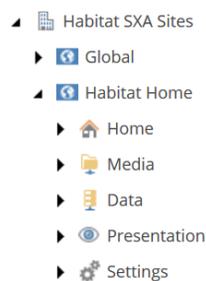
- The CONTENT tab is where you edit an item.



- The content tree displays all the items that are created in the Sitecore installation and has a similar structure to the one used in Windows Explorer. The content tree has a root and then each item has parent. A parent item always displays with an arrow that can be expanded to view children of that item.

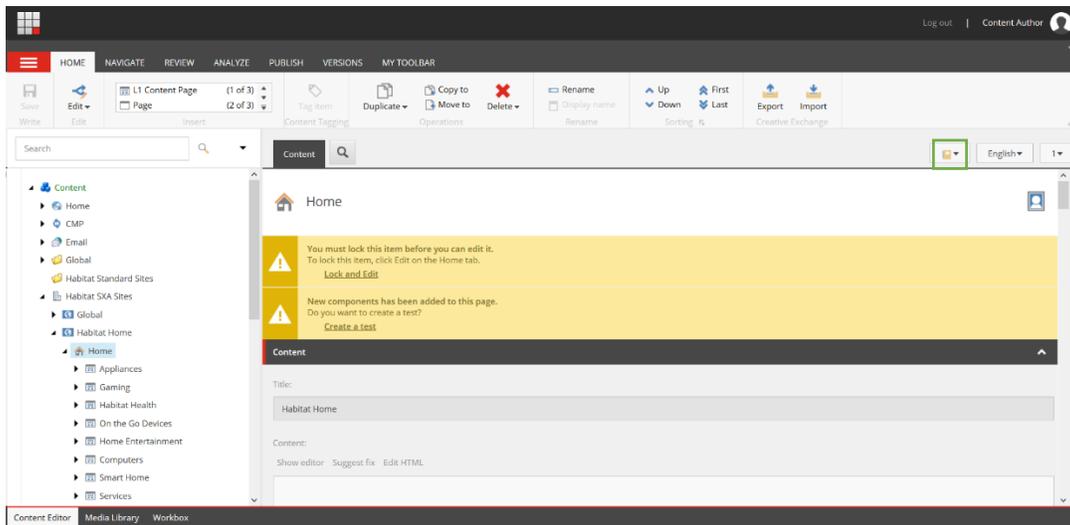


- The content tree displays the site infrastructure. Click the **arrow** to the left of the “Habitat Home” item to expand the content tree. In this case, Habitat Home is the parent. All items below are child items.

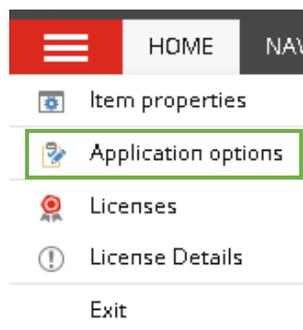


NOTE: There may be multiple sites in your own Sitecore instance.

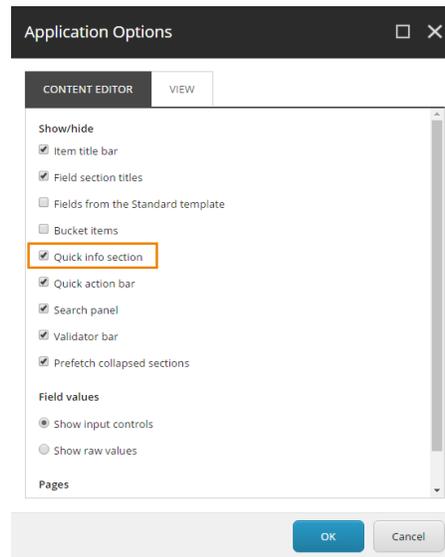
7. Select the **Home** item in the **Habitat Home** site folder. On the right, you'll find the content editing pane showing the content of the selected item. Click the **Lock and Edit** hyperlink. Now that you have unlocked the item (page), all fields can be edited.



8. In the content tree, click the **Home arrow** to display all the site contents.
9. The Home page was version 1. When an item belongs to a workflow (as this item does), and the item is in the final workflow state (which this item is), and a content editor locks it for editing, a new numbered version is created. Notice how the numbered version has changed to version 2.
10. Click Launchpad's **menu**, then select **Application options**. The dialog box opens, allowing you to customize the Content Editor environment.



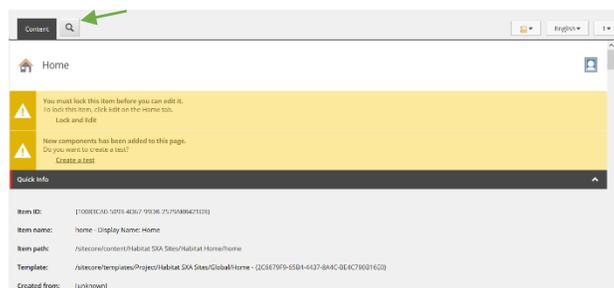
- The **CONTENT EDITOR** tab lists features of the Content Editor that you can turn on and off. Select the **Quick info section** check box and then click **OK**.



- Click the **Quick Info drop-down arrow** to expand the section to display information about the item, including: name, unique ID, the item's path, and which template defines the fields the item contains.



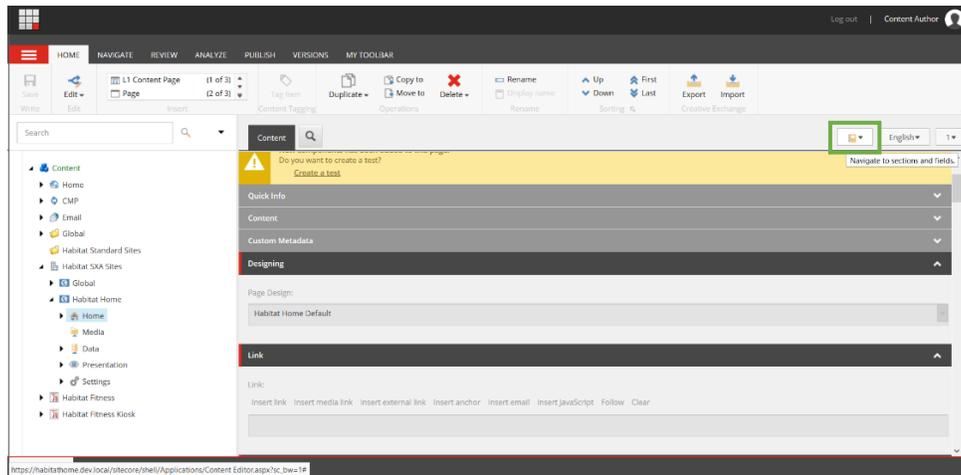
- To quickly find an item click the **magnifying glass** icon. The Search tab displays, allowing you to quickly search the parent item and its children.



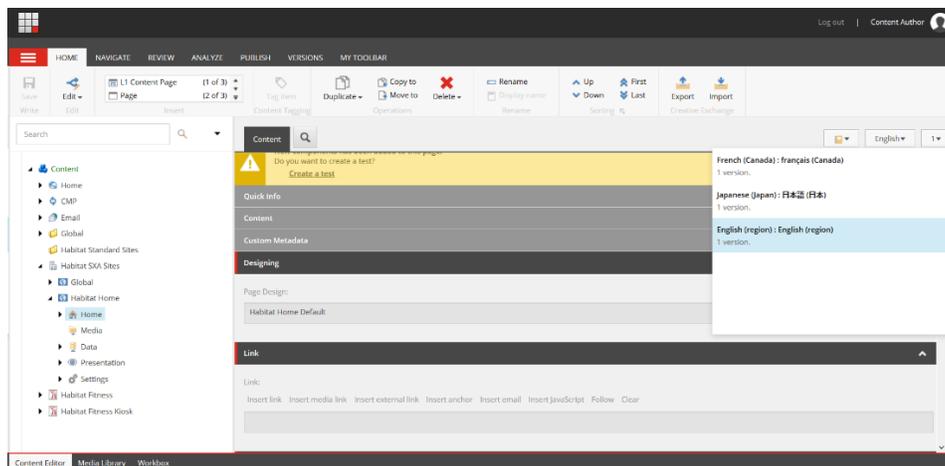
14. Click the **X** to close the Search tab.



15. Another useful feature of the Content Editor is the field selector, which allows you to quickly locate a specific item field. To access the field selector, click the **Notebook** icon. The field list displays in bold and shows the fields under each section. Click a field to navigate right to it.

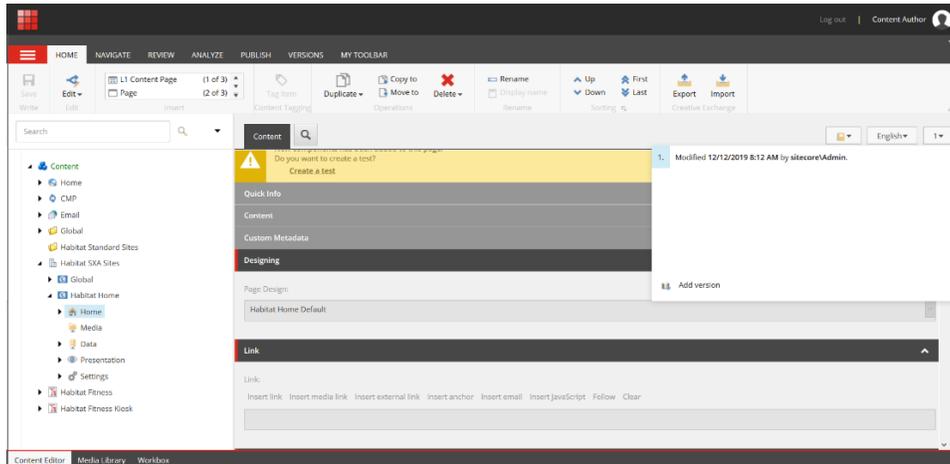


16. The language drop-down allows you to quickly switch between language versions. Habitat Home is a multilingual site. To switch the site from English to Japanese click **English**, then select **Japanese** from the list. Notice the field contents have changed.



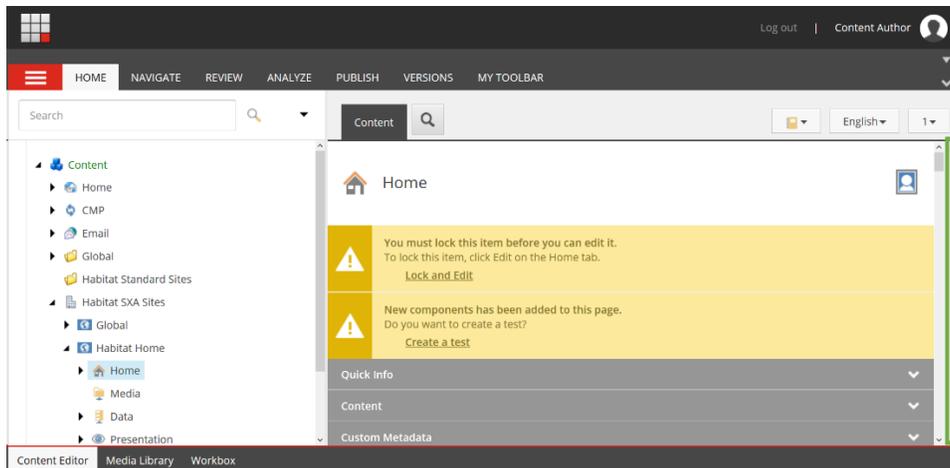
17. Switch the language back to **English**.

18. The version number displays next to the language list. To switch between numbered versions of an item, click the **number drop-down**, then select another **numbered version** from the list.

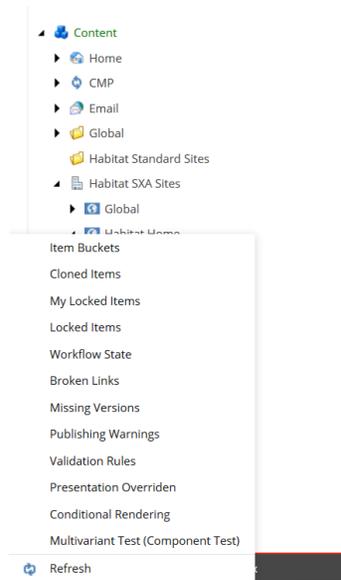


Numbered versions can either be created manually by Authors or automatically by a Sitecore workflow.

19. The Validation bar displays any potential warnings and errors. In this example, there are no validation warnings so the icon displays green. Depending on the issue's severity, it could display as yellow or red warning markers.

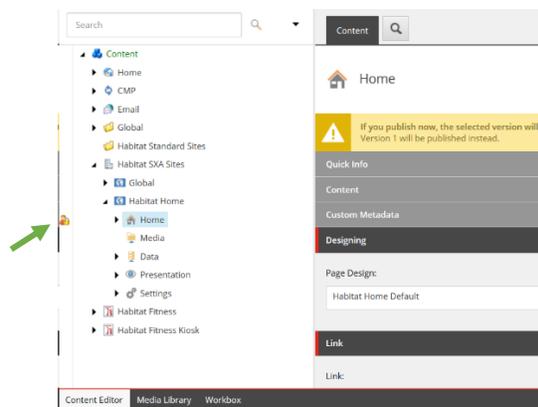


20. The Quick Action bar shows icons that store information about items in the tree. To bring up the Quick Action bar, **Right-click** the bar to left side of the content tree.



21. From the list, select the **My Locked Items** icon. An icon appears in the Quick Action bar to the left of the Home item indicating this item is locked.

22. To unlock the Home item that we locked earlier in this lesson, click the **lock** icon in the Quick Action bar.



23. The Home page is now unlocked. To make further changes, lock the item again.

24. Click the **Launchpad** icon to return to the Launchpad.

STOP HERE

Editing in the Content Editor



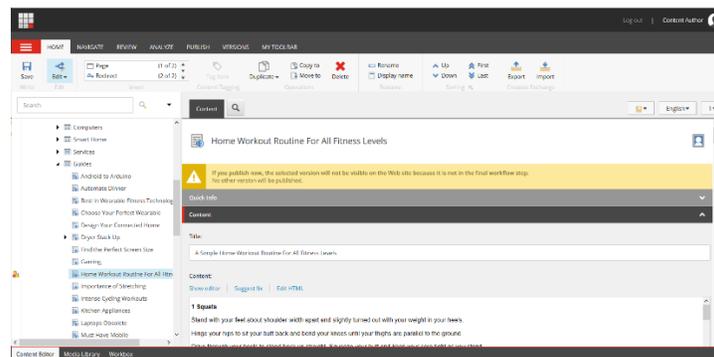
The Content Author uses the Content Editor to edit and manage items. She also looks at different ways to create and edit new items in the Content Editor. After using spell-check, she validates her content and unlocks the items she has edited.

Lab 3.2: Creating, Editing, and Validating an Item

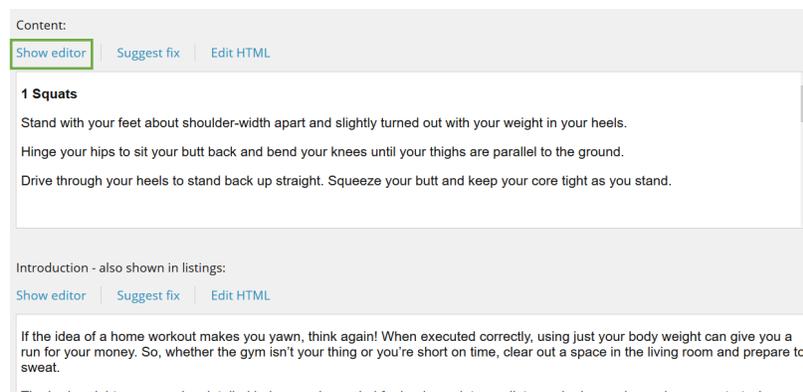
In this lab, you will edit existing item and create a new content item using the Content Editor, then you will validate, and spell check the item. You will also edit associated content using the Experience Editor and the Content Editor.

NOTE: This lab takes approximately 12 minutes.

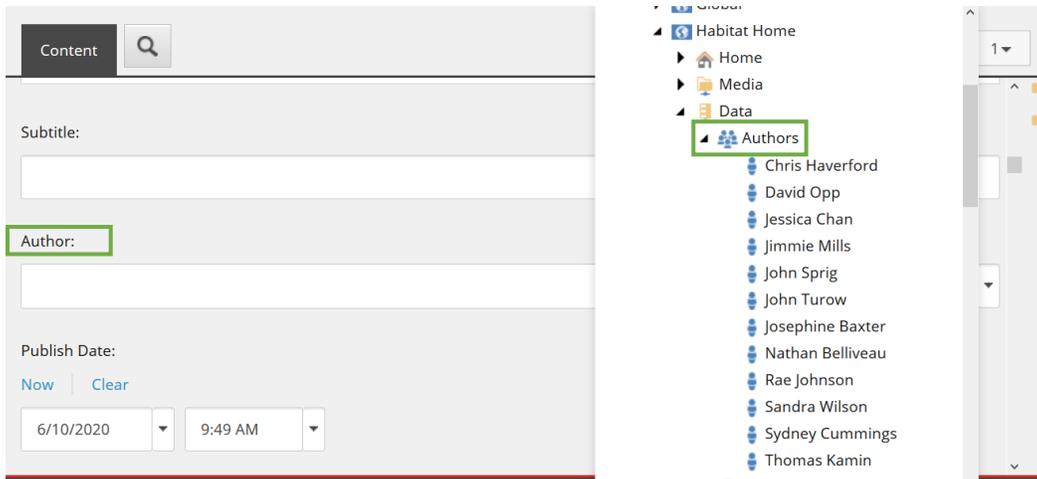
1. Log in as a Content Author with username: **Content Author**, and password: **c**.
2. From the Launchpad, open the **Content Editor**.
3. In the content tree, select **Content/Habitat SXA Sites/Habitat Home/Home/Guides**.



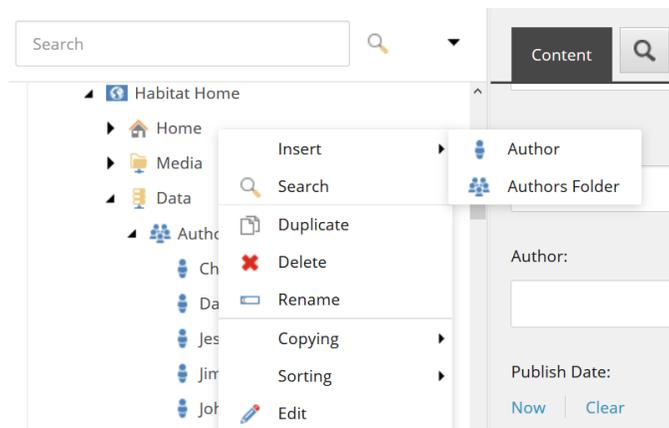
4. In the content tree select the **Home Workout Routine for All Fitness Levels** item created previously.
5. Notice that the **Content** field and the **Introduction** field contain the content entered earlier. If you need to edit the content, click the **Show editor** link to bring up the Rich Text Editor.



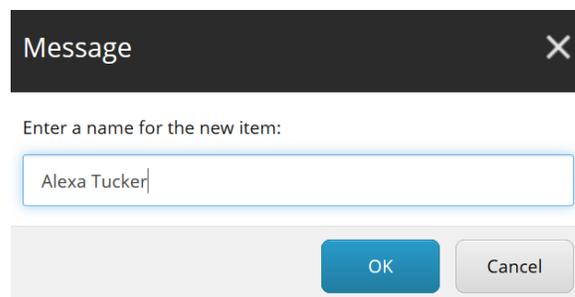
6. Scroll to the **Author** field and provide the Author who wrote the guide. Click the **drop-down list** and navigate to *Habitat Home>>Home>>Data>>Authors* to look for Alexa Tucker. There's no such Author name listed.



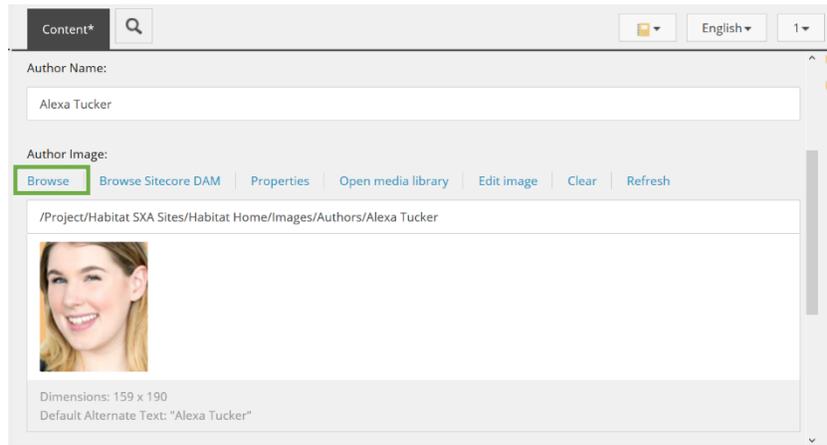
7. Since she's a new Author, you'll need to create the Author details. In the content tree, navigate to *Habitat Home>>Data>>Authors*. Right click on the **Author** item, then click **Insert>>Author**.



8. Enter the name *Alexa Tucker* and click **OK**.

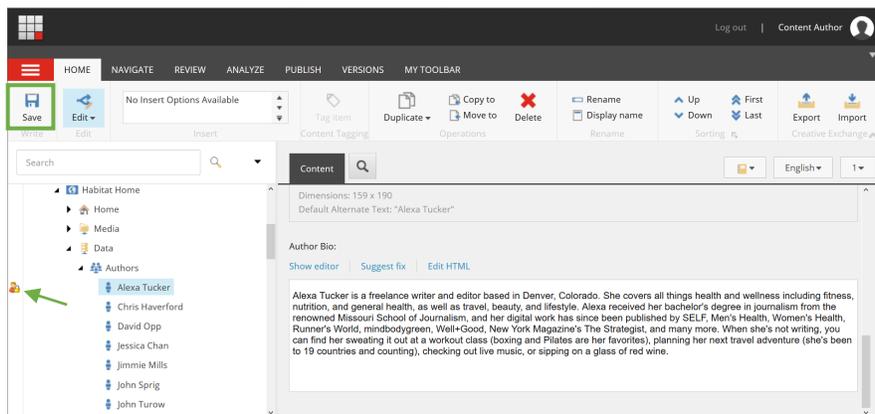


- In the Author section of the Content tab, upload her profile picture by clicking the **Browse** link. (Refer to the previous lab on how to upload an image to the proper destination.)

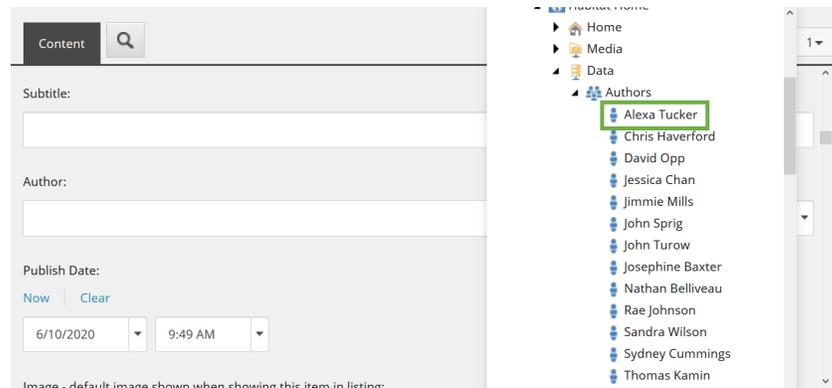


- Enter her bio by copying and pasting the content from the Word document. (Refer to previous lab for adding content using the RTE.)

- Save and unlock the Author item.



12. Navigate back to the Home Workout Routine for All Fitness Levels item to complete the Author field.

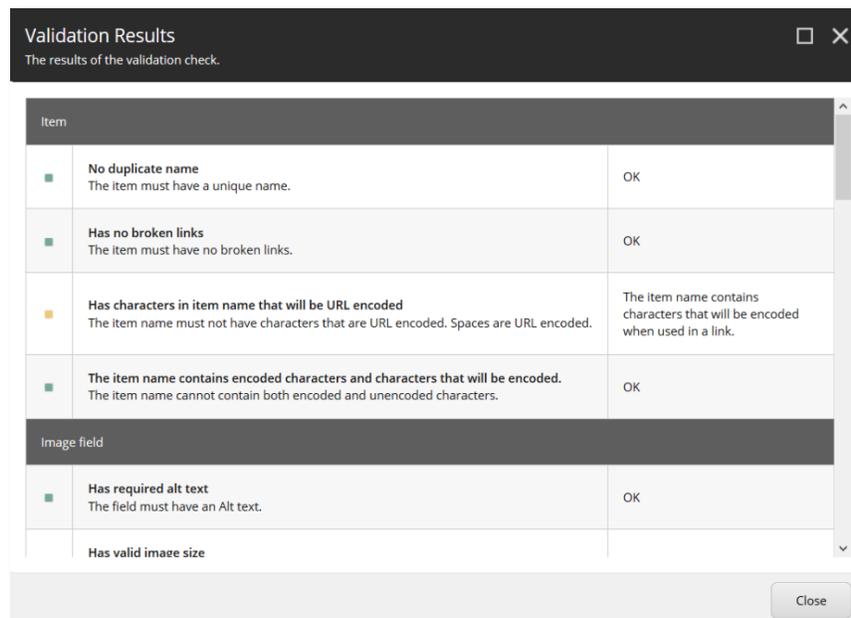
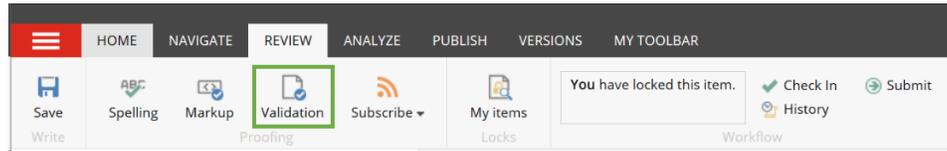


13. **Save** and **unlock** the Home Workout Routine for All Levels item.

To validate and spell check the item:

The Content Editor REVIEW tab contains commands to validate and spell check items.

1. On the ribbon, click the **REVIEW** tab and click **Validation**.

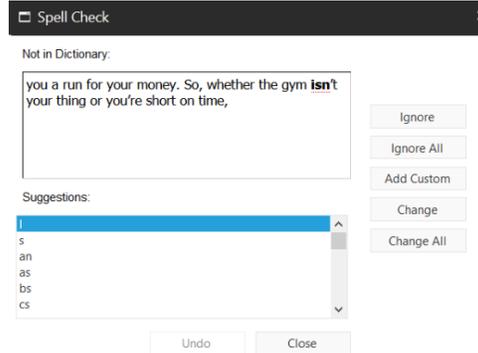


What validation warning is shown? Answer:

How would you fix what is invalid? Answer:

2. Click **Close** (depending on which browser you are using, you may be clicking **OK** instead of Close).

- On the ribbon, in the REVIEW tab, click **Spelling**. The Spell Check dialog box opens.



The spell checker that is used by the Content Editor differs from that used by the Experience Editor. The Experience Editor uses the spell checker that comes with the browser, while the spell checker in the Content Editor is an integrated tool.

- Click **Close**.
- Click the floppy disk icon to **Save** the item and then return to the Launchpad.

STOP HERE

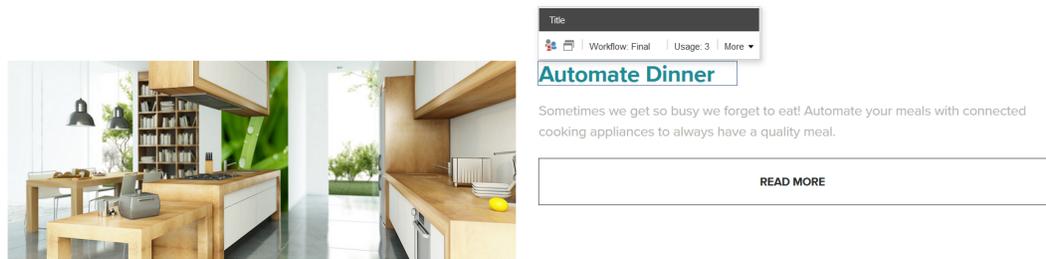
Lab 3.3: Associated Content

To edit associated content in the Experience Editor

You have seen that Sitecore can show content from items on any page. The list of guide articles on the Guides page is a great example of content reuse. In Sitecore reusable content is called associated content.

In this section, you will edit the Summary field of Gear Category items. The content is stored on Gear Category items but displayed on the Gear page and is considered associated content.

1. From the Launchpad, open the **Experience Editor**.
2. Use the Navigation bar to navigate to the **Guides** page.
3. Expand the **Notification bar** and lock the item for editing.
4. Scroll down the page and select the **Title** field of the Automate Dinner item.



On the floating toolbar, you can see that the field is being used in three places.

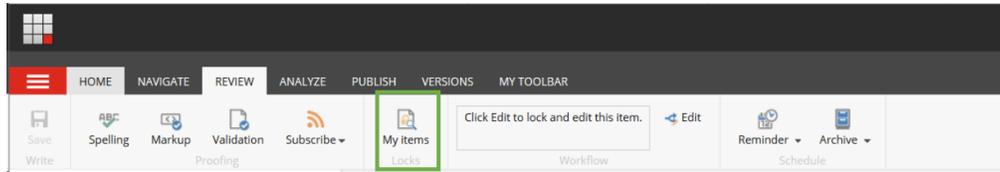
General information	
Property	Value
Item path:	/sitecore/content/Habitat SXA Sites/Habitat Home/home/guides/au...
Version:	1 of 1
Workflow:	Demo Workflow
Workflow state:	Approved
Locked by:	Not Locked
Last modified:	12/10/2019 07:45

Items that use this associated content		
Webpage	Path	Last modified
Automate Dinner	/sitecore/content/Habitat SXA Sites/Habitat...	12/10/2019 07:45
Guides	/sitecore/content/Habitat SXA Sites/Habitat...	12/10/2019 07:45
Habitat Health	/sitecore/content/Habitat SXA Sites/Habitat...	12/12/2019 08:12

5. In the Message dialog, click **OK**.
6. Return to the **Launchpad**.

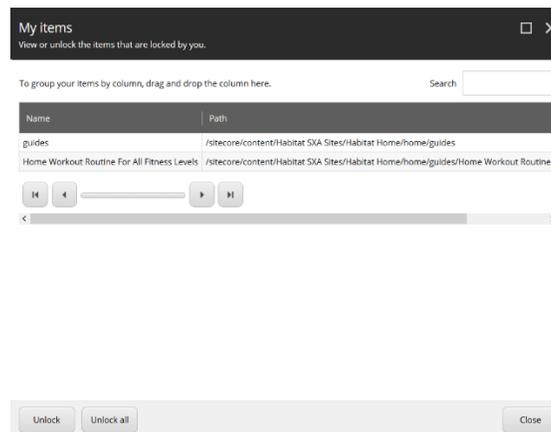
To unlock locked items in the Content Editor

1. On the ribbon, select the REVIEW tab, and choose **My items**.



We have locked a number of items in the last few sections. Use the **My items** command on the REVIEW tab to unlock them.

2. In the My items dialog box, click **Unlock All**, then click **OK**.



A Sitecore recommended practice is to automatically lock or unlock items when you are finished working on them. There are two configuration settings that enforce this behavior. Talk to your Sitecore Partner or Sitecore Certified Developer about how to enforce automatic locking or unlocking of items when items are saved.

3. Click the **Close** button.

STOP HERE

Questions

Q1: What is the Validation bar?

Q2: What is the Quick Action bar?

Q3: How do you access the Media Library from the Content Editor?

Apply What You Learned

When you begin to work on your Sitecore instance:

- Identify the type of permissions you have and what you can access in the Content Editor.
- Customize the ribbon and the Content Editor to make it easier to use.
- Unlock items on completion of editing.

Review

In this module, you learned about the Content Editor and its features. You used the Content Editor for managing your website and item locking. You also learned what associated content is and how to edit and manage it.

Module 4: Managing Media

In this module, you will learn about the Media Library, the types of media that can be uploaded, and how to search and edit media items. You will learn about recommended practices for the Media Library and how to add Alt text. This module will also cover how you can add images to image fields in both the Experience Editor and the Content Editor.

By the end of this module, you will be able to:

- List the different types of media files that can be uploaded to Sitecore.
- Demonstrate how to edit a media item.
- Summarize recommended practices for working with the Media Library and media items.

Applying Recommended Practices to Media Items



The Designer wants to upload images and banners to the Habitat Home website, so he explores the Media Library in Sitecore. He begins by reviewing the recommended practices for the Media Library.

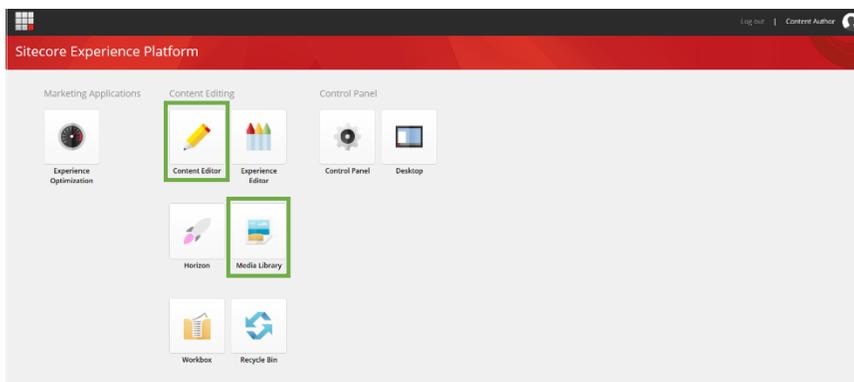
Diego supports Caroline, the Content Author, in sourcing and adding images to her new Guides article. He learns how he can add images by using both the Experience Editor and Content Editor. Emma, the Marketer, will add the promo to the “Guide” item that Diego has created.

Lab 4.1: Uploading a Media File and Editing a Media Item

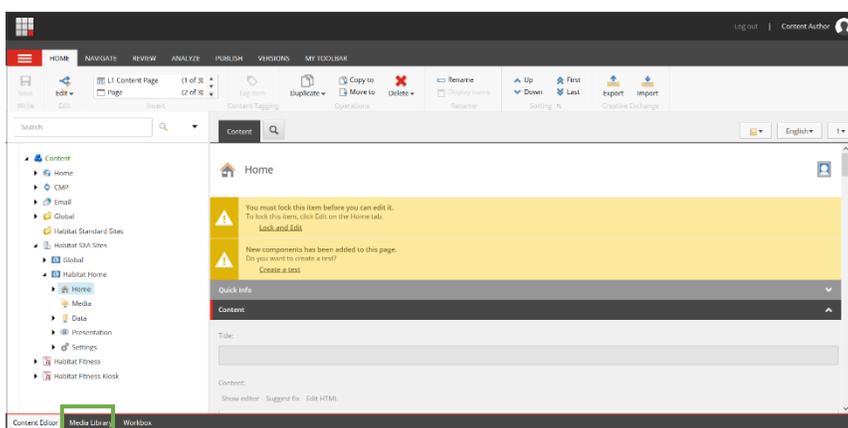
In this lab, you will open the Media Library, upload an individual media file and edit the media item that contains the media file. You will also upload media while editing an item.

Uploading a Media File and Editing a Media Item

1. On the Sitecore login screen, log in as Content Author with username: **Content Author**, and password: **c**.
2. The Launchpad is displayed. There are multiple ways to access the Media Library. The Launchpad has a link to the Media Library. The Media Library can also be accessed from the Content Editor. Click **Content Editor** to start editing.

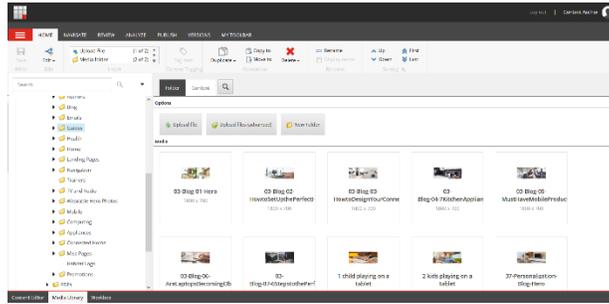


3. The Content Editor is displayed. Application tabs are located at the bottom left corner of the window. Click the **Media Library** tab.

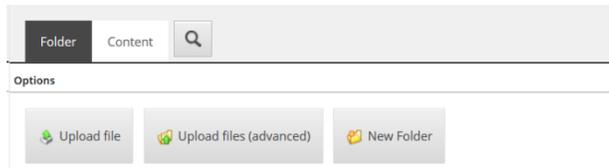


4. The Media Library content tree is displayed. All media items are managed from the Media Library, including images and documents for download by visitors, as well as videos and audio files. In the content tree click the arrow to expand **Media Library>>Project>>Habitat SXA Sites>>Habitat Home** folder.

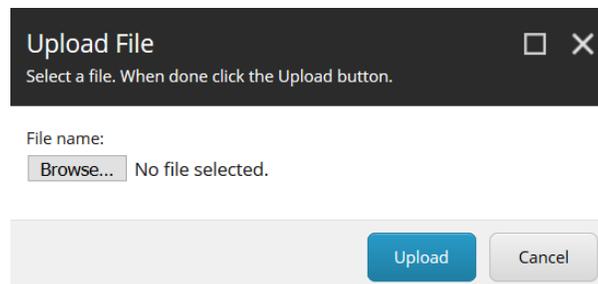
- Habitat Home media folders display. Select the **Images>>Guides** folder.



- The Guides folder contents display. Next, add a new media item to the library. In the Options section, click the **Upload file** button.



- The **Upload File** dialog box displays. Click the **Browse** button to browse the computer and locate the Student Resources folder.



- Select the **Man working out in Gym.jpg** image file.
- Click the **Open** button, then click **Upload** to upload the image.

Media items have many fields where information can be added about the item, including taxonomies, descriptions, keywords, copyrights, artists, and more.

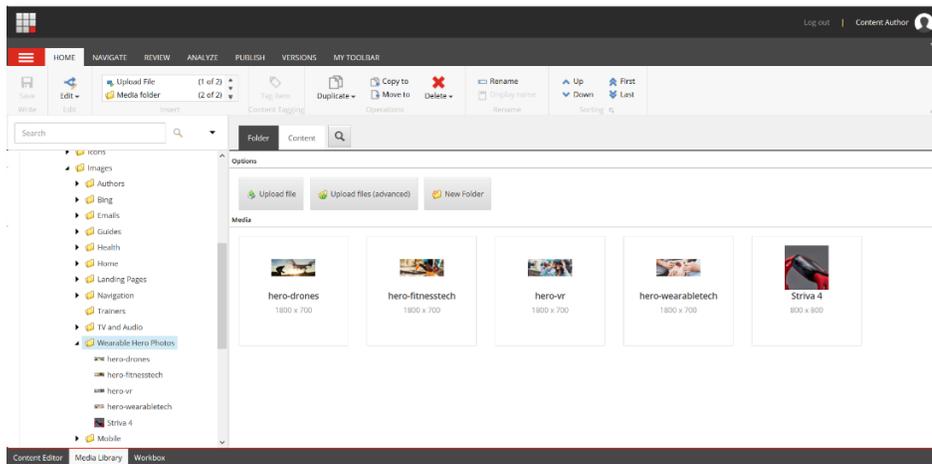
STOP HERE

Lab 4.2: Upload Files (Advanced)

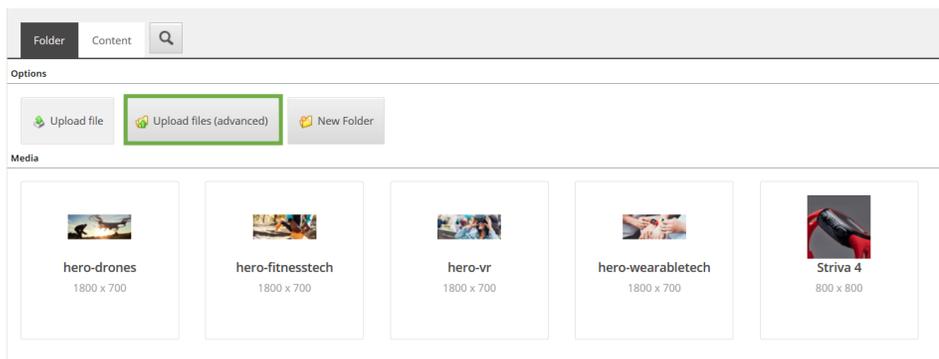
Now that you know how to add images using the Upload file option, you can upload multiple media files in zip format to speed up the process. This lab uses your knowledge of the Media Library to upload zipped media files using the Upload Files (Advanced) option.

NOTE: This lab takes approximately 5 minutes.

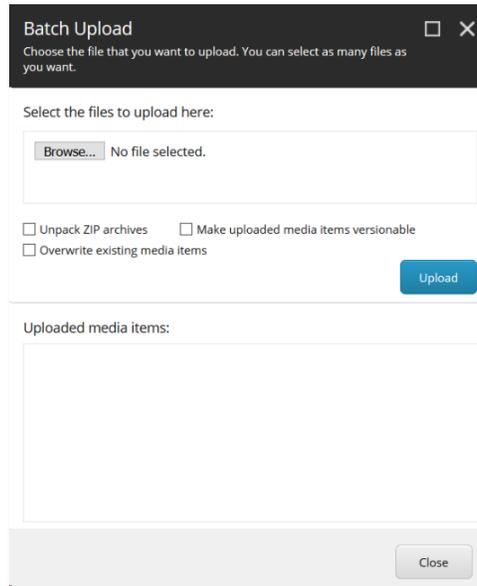
1. In the Media Library, Select the **Images>>Wearable Hero Photos** folder.



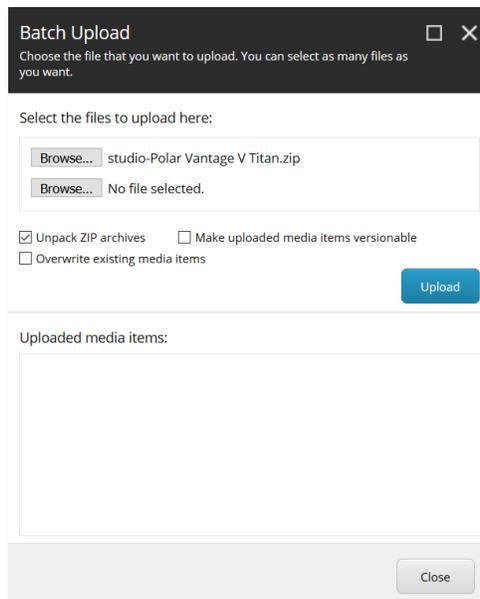
2. The “Wearable Hero Photos” folder contents display. Next, add new media items to the library. In the Options section, click the **Upload files (advanced)** button. Noticed that currently there are only five image items in the folder.



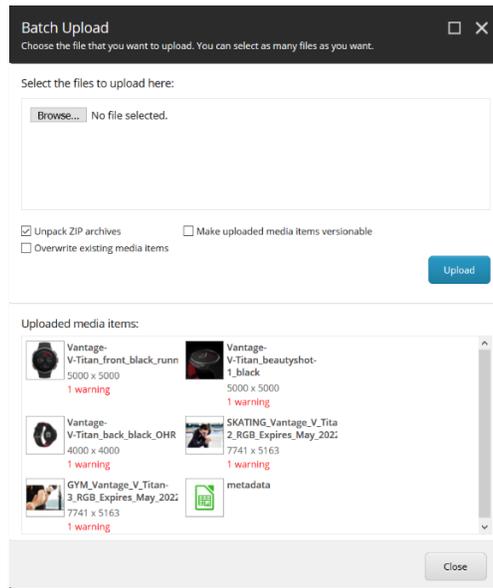
- The Batch Upload dialog box displays. Click the **Browse** button to browse the computer and locate the "Student Resources" folder.



- Select the **studio-Polar Vantage V Titan.zip** file. Check the **Unpack Zip Archives** option.



5. Click **Upload**. The new images are uploaded to the Wearable Hero Photos folder.



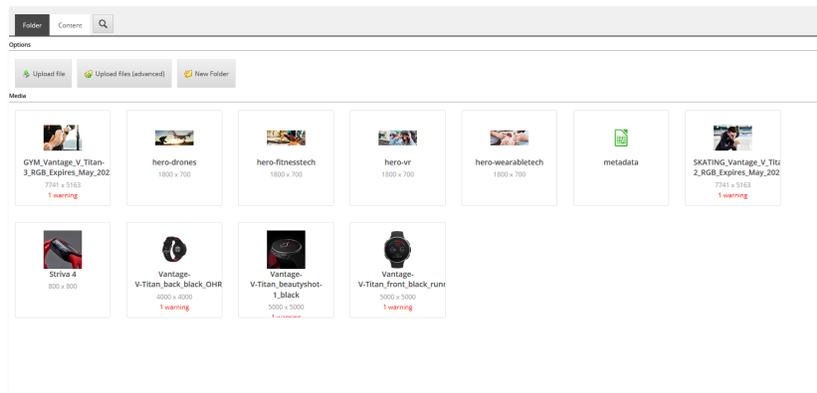
6. Click **Close**.

Lab 4.3: Edit Media Item

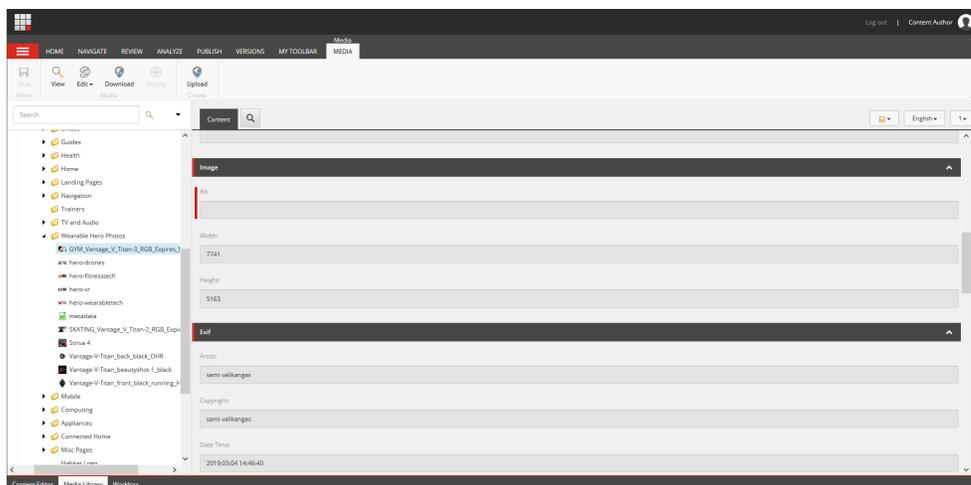
Now that you have uploaded media files, it's time to edit those items where needed. In this lab you will edit the content of the media item just like editing any item in Content Editor.

NOTE: This lab takes approximately 5 minutes.

1. In the Media Library, Select the **Images>>Wearable Hero Photos** folder to display the contents.



2. There are **warning** notifications on newly uploaded images. Click on any of the images with warnings to open. Click the **Lock and Edit** link to start editing.



3. What was the reason for the warning?

4. Correct the validation warning and save and unlock the item.

STOP HERE

Questions

Q1: Name at least two types of files that can be uploaded to the Sitecore Media Library.

Q2: Name at least two ways of uploading media files to Sitecore.

Q3: Can the Media Library be opened from the Launchpad?

Q4: What is *Alt text*?

Apply What You Learned

When you begin to work on your Sitecore instance:

- Explore your Media Library to understand its folder structure and contents.
- Investigate your permission level. Can you create new folders or structure the media items?

Review

In this module, you learned about the Media Library, media items types, and how to search and edit the media items. You also learned how to add images in the Experience Editor and the Content Editor.

Module 5: Publishing in Sitecore

This module covers publishing in Sitecore. You will set up publishing restrictions, preview your items before publishing, and learn about item and site publishing.

By the end of this module, you will be able to:

- Explain the difference between site publishing and item publishing.
- List the different types of site publishing.
- List the different types of item publishing.
- Recall when to use publishing settings on an item and versions of an item.
- Preview the content before publishing.
- Demonstrate how to use the publishing facilities in Sitecore.

Publishing with Sitecore



The Marketer needs to publish items that are not a part of a workflow; therefore, she needs to learn about publishing and publishing restrictions in Sitecore.

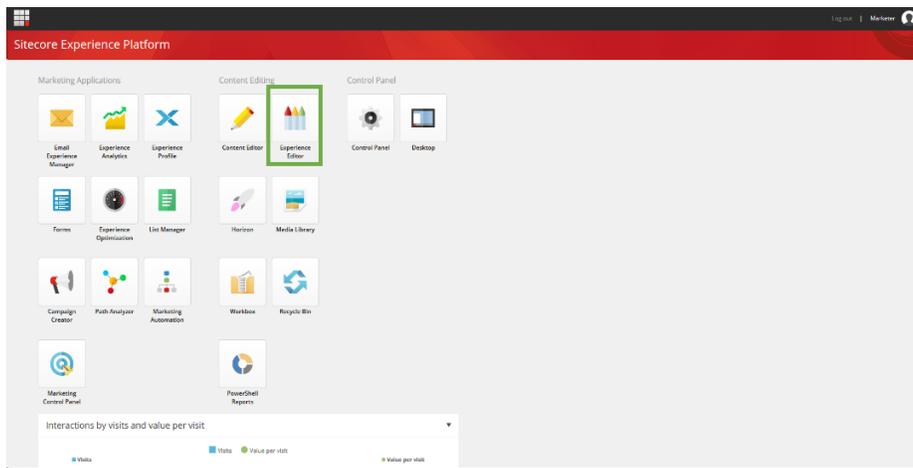
Lab 5: Publishing an Item, Publishing Restrictions, and Publishing the Site

In this lab, you will learn how to publish the guide article item. Most likely, your Sitecore instance will have workflow associated with the item for auto or scheduled publishing, as it's the recommended best practice. But for the purpose of the lesson, item will need to be published manually. You will view the published item on the live site.

NOTE: This lab takes approximately 15 minutes.

To create a new item version:

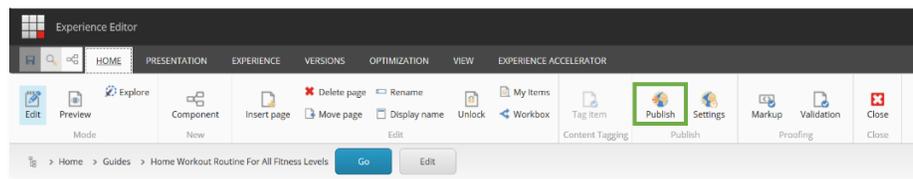
1. Log in as the Marketer with username: **Marketer**, and password: **m**.
2. On the Launchpad, click **Experience Editor**.



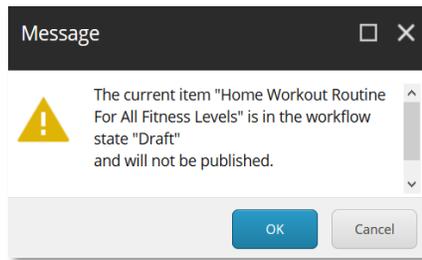
3. Navigate to the "Home/Guides/ Home Workout Routine for All Fitness Levels" guide article.



4. On the ribbon, on the HOME tab, click **Publish**.



You are manually publishing this item, which is still in the “Draft” state of a workflow. Sitecore will not publish the item until it reaches the final state.



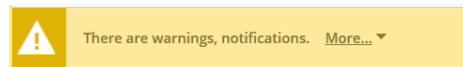
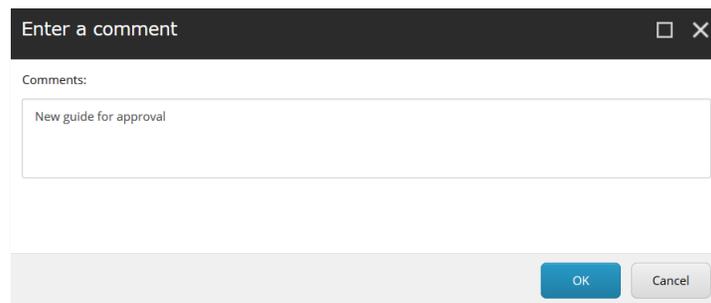
5. Click **Cancel** to dismiss the message. (If you click OK, a publishing dialog box appears, but we will not be publishing.)
6. In order to publish the item, it has to be submitted for approval. The workflow design dictates the item may be published immediately or held for a regular schedule.

To Submit the item for approval:

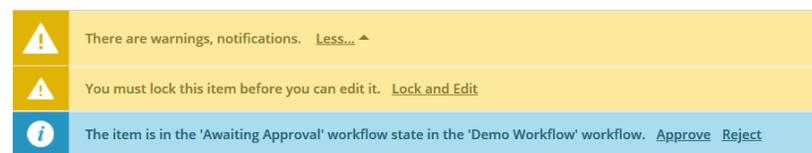
1. Click **Submit** on the notification bar.



2. In the Enter a comment dialog box, enter *New guide for approval* and click **OK**.



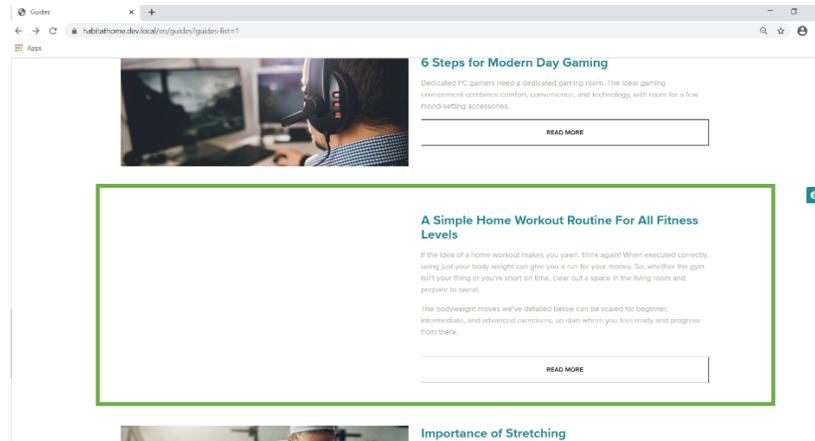
3. Click **More** on the notification bar, then click **Approve**.



4. Click **OK** to dismiss the comment dialog box. The item will now be published immediately.

To verify that the changes are live:

1. To view your published content in a different browser, navigate to the Guides page <https://habitathome.dev.local/guides>.
2. Verify that you see the new title of the guide article, *"A Simple Home Workout Routine for All Fitness Levels."*



3. Hold on! Why is the Image missing from the guide article?

Leave this browser open. You will return to it in the next section.

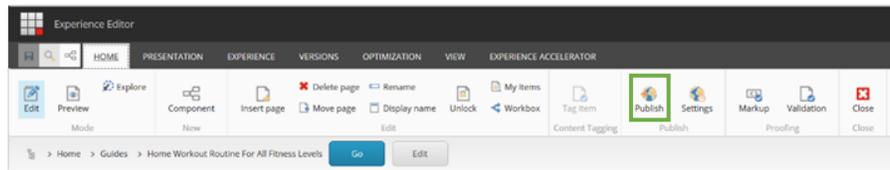
To publish a related item or items

Because normal Authors and Marketers may have restricted access to publishing commands, you will log in as the Admin user to see all the publishing options available.

1. Log in as Admin with username: **admin**, and password: **b**.
2. On the Launchpad, click **Experience Editor**.
3. Navigate to the *Home/Home/Guides/Home Workout Routine For All Fitness Levels*.

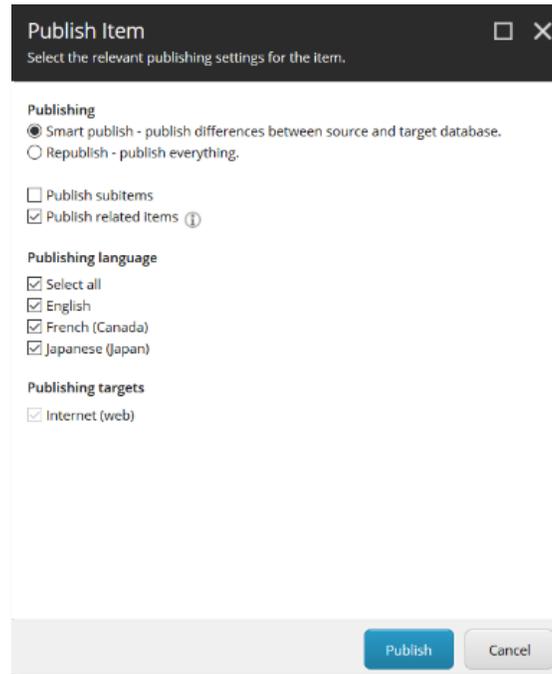


4. On the HOME tab, click **Publish**.



5. In the Publish Item dialog:
 - **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; if the item has changed, it is then published.
 - **Republish:** Publishes everything. Republish overwrites the selected item in the target database with the equivalent item from the Master database, whether it has changed or not.

6. Leave **Publish related items** checked. Deselect **Publish subitems** if selected.



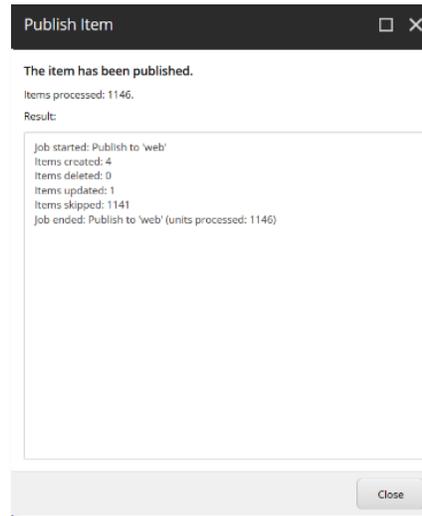
- **Related items:** References for Clones, Media, and Aliases.
- **Publish subitems:** Child items of the selected item.

We uploaded a new media item and needed to select related items; if related items was not selected, then you will see a guide article without the image.

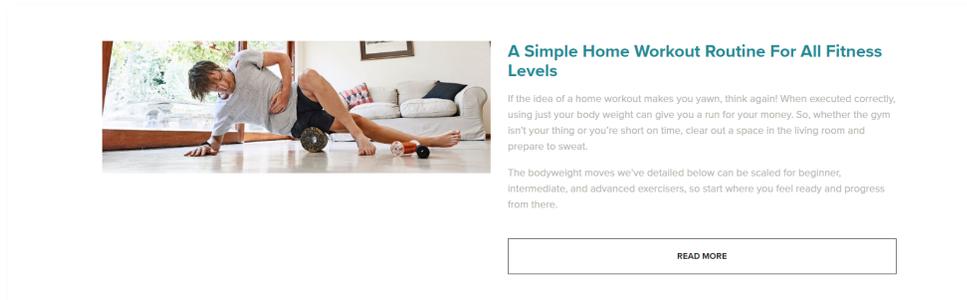
6. Select all Publishing Languages if appropriate.

7. Click **Publish**.

8. In the dialog box, click **OK** and then **Close**.



9. Return and reload the browser you used to verify the Guides page, making sure it has been updated.

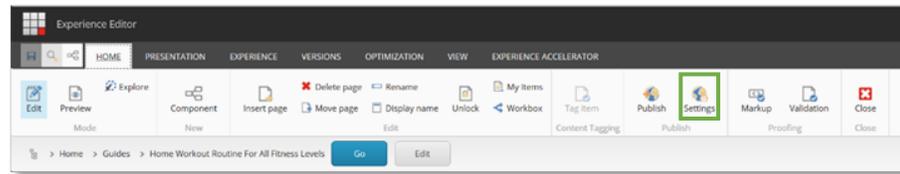


To configure publishing restrictions:

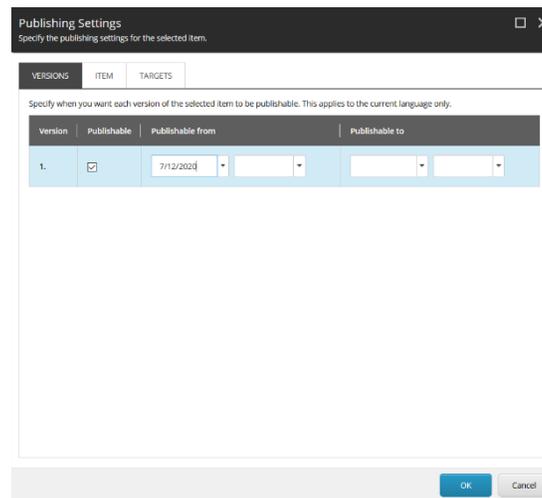
1. On the Sitecore **login** screen, log in as Marketer with username: **Marketer**, and password: **m**.
2. Navigate to the *Home/Home/Guides/Home Workout Routine For All Fitness Levels*.



3. On the HOME tab, click **Settings**.



4. In the Publishing Settings dialog, on the VERSIONS tab, make version 1 available starting on the first day of the next month.



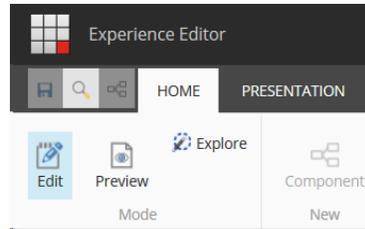
In the Publishing Settings dialog, you can specify when you want each version of the selected item to be publishable. Settings, on the Versions tab, apply to the current language only. Use this to ensure that items that are not published before they are ready—in this case, version 1 of the guide article.

5. Click **OK**.

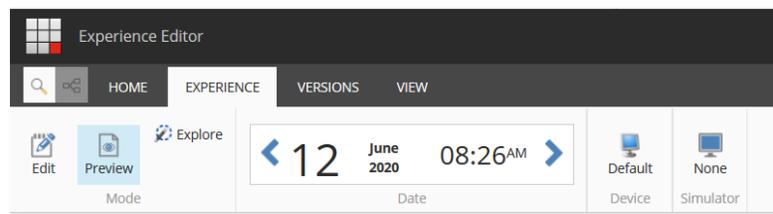
Save changes to the item.

To preview the publishing restrictions:

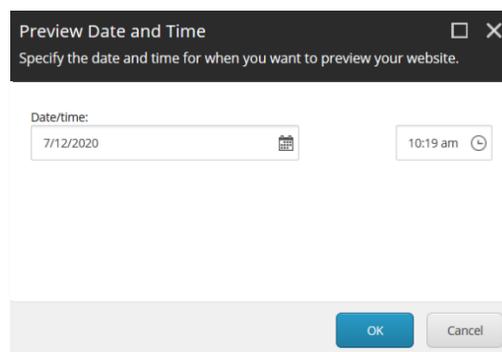
1. On the ribbon, on the HOME tab, click **Preview**.

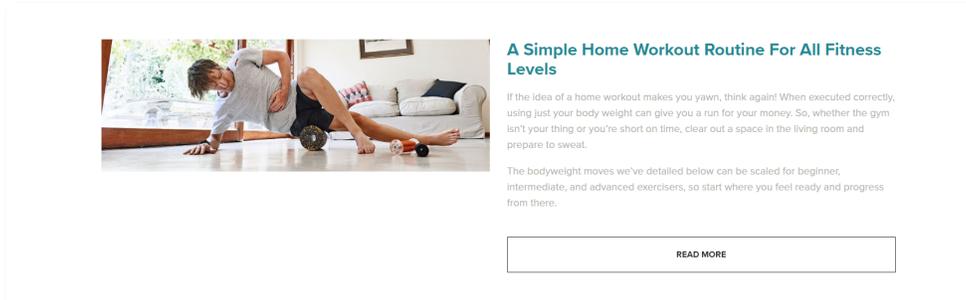


2. Navigate to *Home/Guides* and verify that version 1 of the “Home Workout Routine For All Fitness Levels” guide article is **NOT** displayed.
3. On the EXPERIENCE tab, click the **Date** command.



4. Use the dialog to change the date past the first day of next month, so that you see version 1 of the “A Simple Home Workout Routine For All Fitness Levels” guide article reappear on the page.

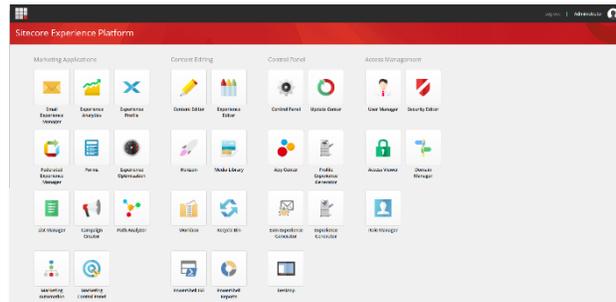




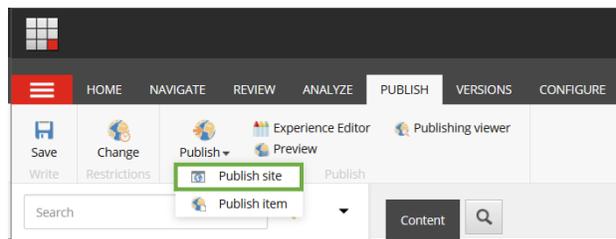
5. Return to the Launchpad and **Log out**.

To publish the site:

1. Log in as Admin with username: **Admin**, and password: **b**.
2. On the Launchpad, open the **Content Editor**.

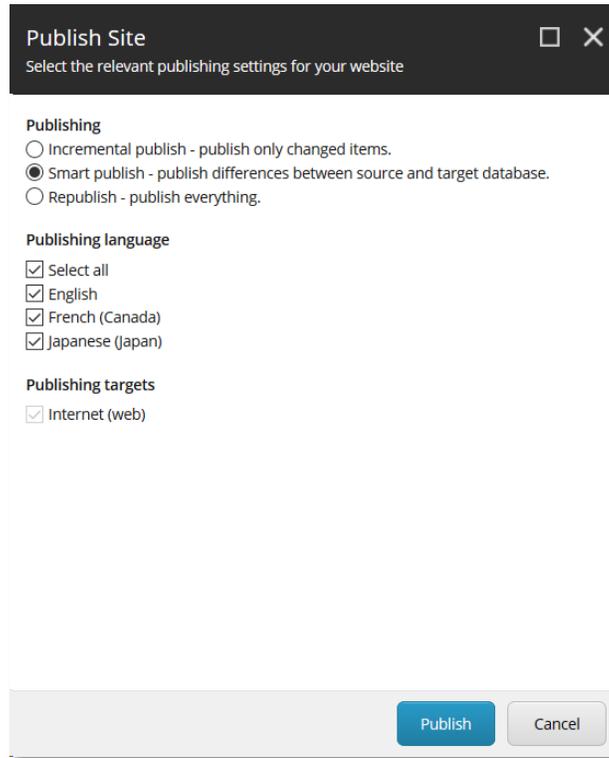


3. Go to the **PUBLISH** tab on the ribbon, then to the Publish drop-down menu, and Select **Publish site**.



The Publish site wizard is only available in the Content Editor and from the Sitecore Desktop.

- In the Publish Site dialog box, select **Smart publish**. Under Publishing language, check the box to **Select all**, then click **Publish**.



- **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. Incremental publishing 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.
- **Republish:** 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.

- Click **Close**.
- Return to the Launchpad and click **Log out**.

STOP HERE

Questions

Q1: Name the two databases involved in publishing.

Q2: What is the difference between incremental publishing and republishing?

Q3: Can you publish the site from the Experience Editor?

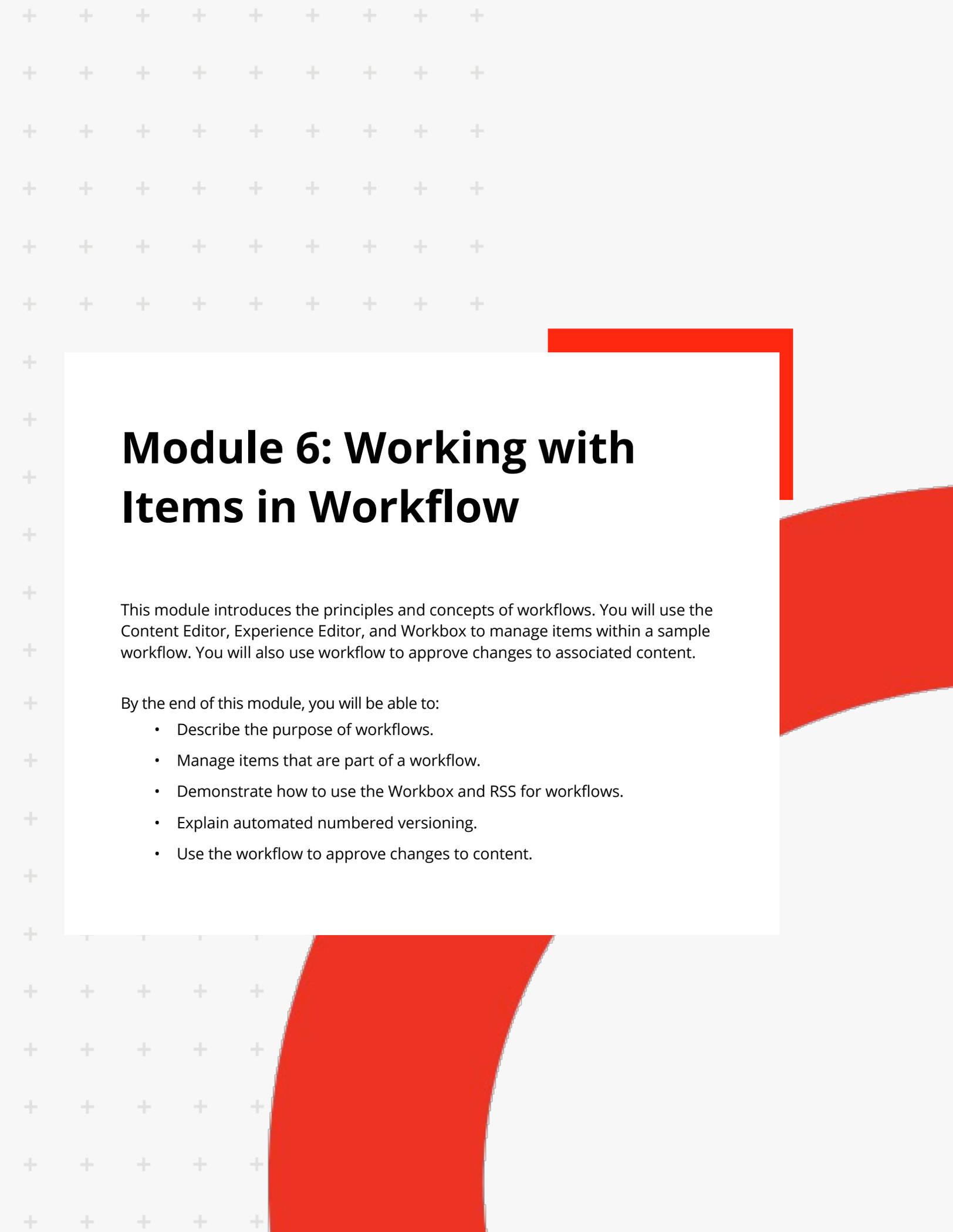
Apply What You Learned

When you begin to work on your Sitecore instance:

- Find out whether you are using publishing or workflows.
- Understand your permissions and whether it is your job to publish.

Review

In this module, you learned about item and site publishing. You learned how to set up publishing restrictions and preview your website items before publishing.



Module 6: Working with Items in Workflow

This module introduces the principles and concepts of workflows. You will use the Content Editor, Experience Editor, and Workbox to manage items within a sample workflow. You will also use workflow to approve changes to associated content.

By the end of this module, you will be able to:

- Describe the purpose of workflows.
- Manage items that are part of a workflow.
- Demonstrate how to use the Workbox and RSS for workflows.
- Explain automated numbered versioning.
- Use the workflow to approve changes to content.

Managing Items in Workflow



The Content Author creates and edits an item and associated content. She then submits the items for approval because she does not have permission to approve.

One of the Marketer's tasks is to approve all content that has been submitted, including associated content. Before she begins to approve submitted items, she reviews the fundamentals of workflows in Sitecore.

Lab 6: Moving Items through Workflow

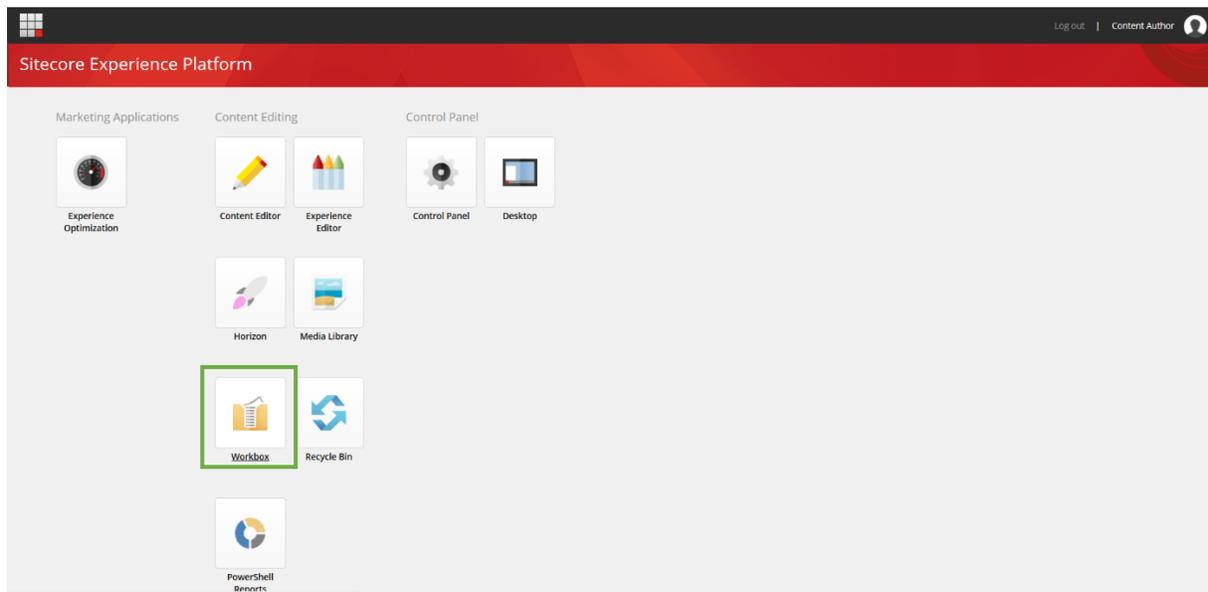
In this lab, you will examine items in various workflow states using the Workbox.

NOTE: This lab takes approximately 5 minutes.

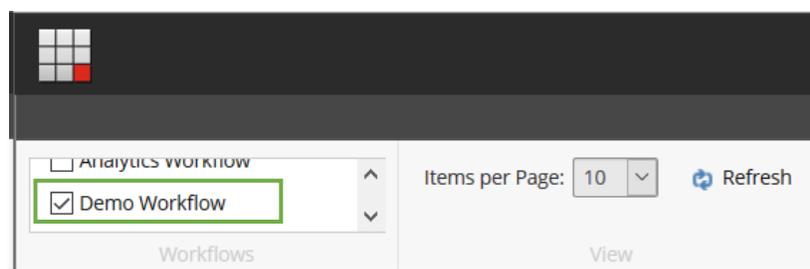
To examine and submit an item for approval in the Workbox:

1. On the Sitecore login screen, log in as Content Author with username: **Content Author**, and password: **c**. All content contributors should have the ability to submit their content for approval.

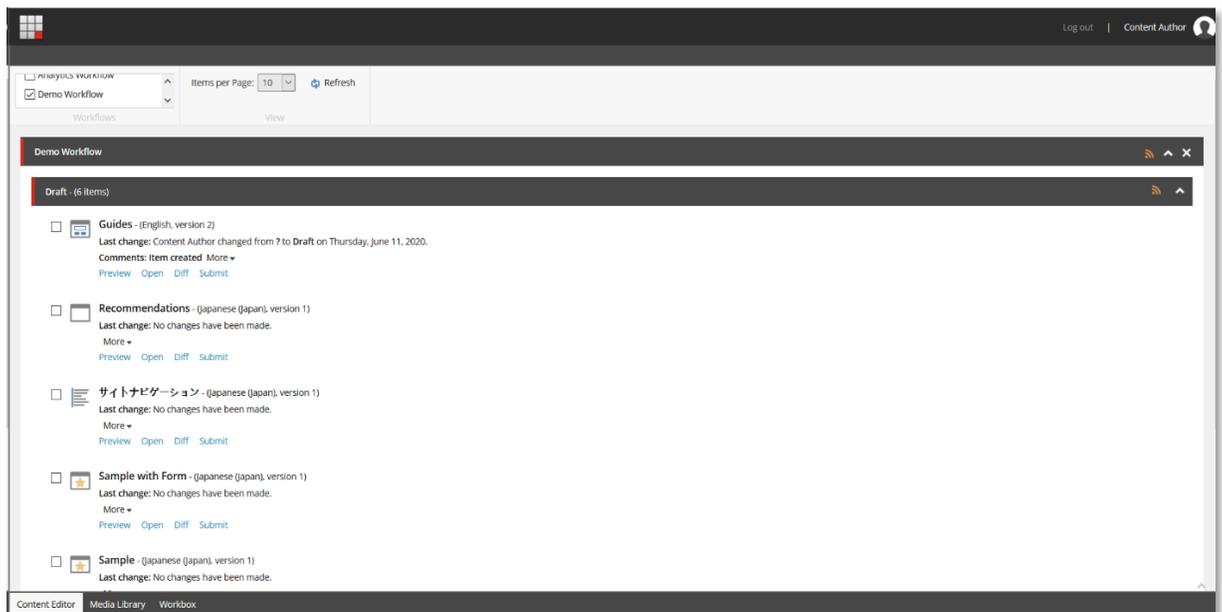
On the Launchpad, click **Workbox**. The benefit of the Workbox is that it is easy to verify that you have submitted item(s) in a specific workflow. It also shows the current state of the item(s) in the workflow.



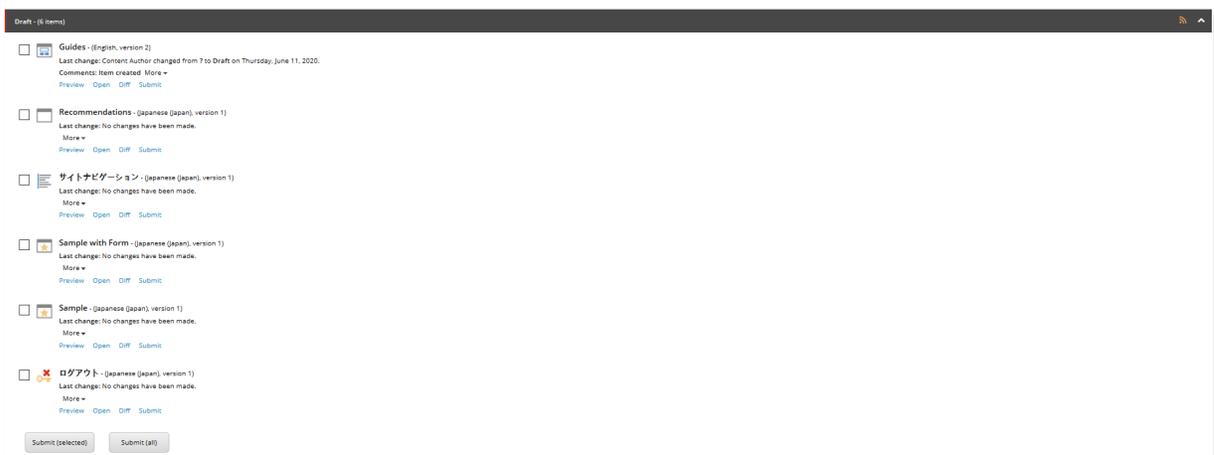
2. Check the **Demo Workflow** in the Workflows group, to examine items in the specific workflow.



- The **Demo Workflow** shows there are 6 items in **Draft** state; expand **Draft** by clicking the down arrow.



- The item(s) can be submitted individually using the **Submit (selected)** or **Submit (all)**. Note: These items may also be submitted for approval using Experience Editor as in earlier lab.

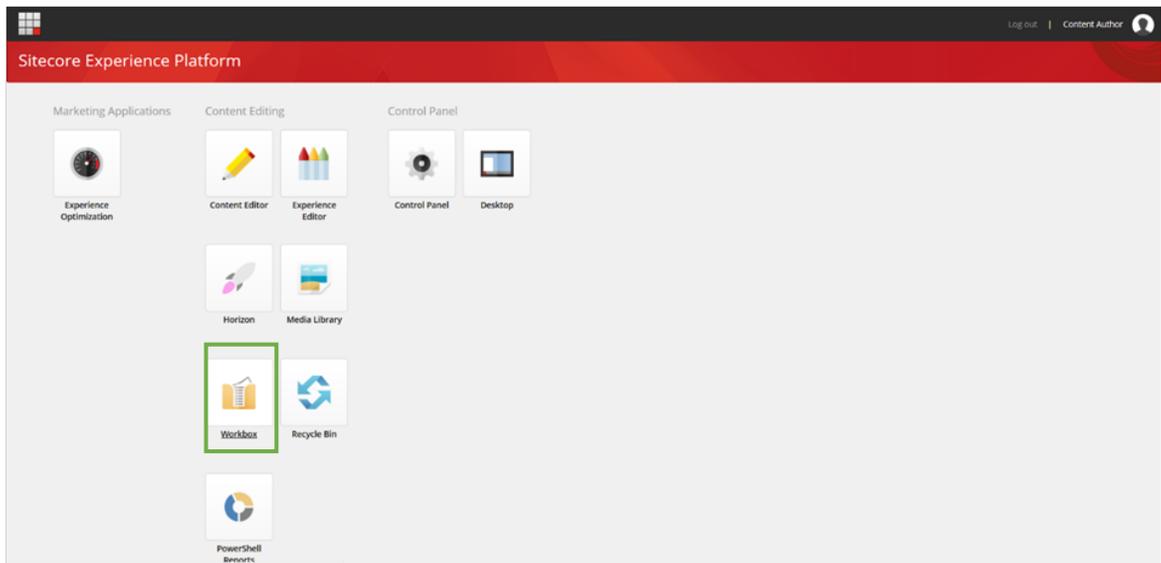


- Click **Submit (all)** to submit all items for approval. Notice that all the items are moved to Awaiting Approval state. When you submit the item for approval, the item will automatically be unlocked.
- Return to the **Launchpad** and click **Log out**.

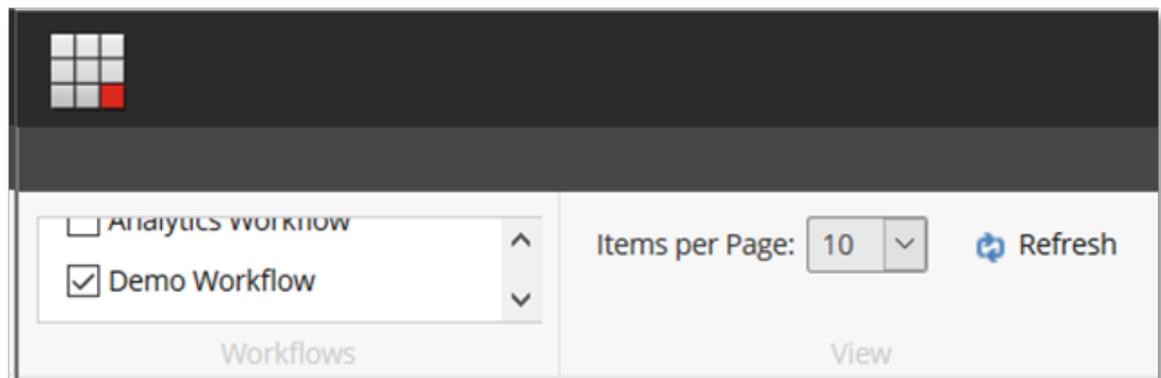
To approve a single item:

In this section, you will learn about approving an item in the awaiting approval state using the Workbox and RRS feed. You will also view the item on the live site.

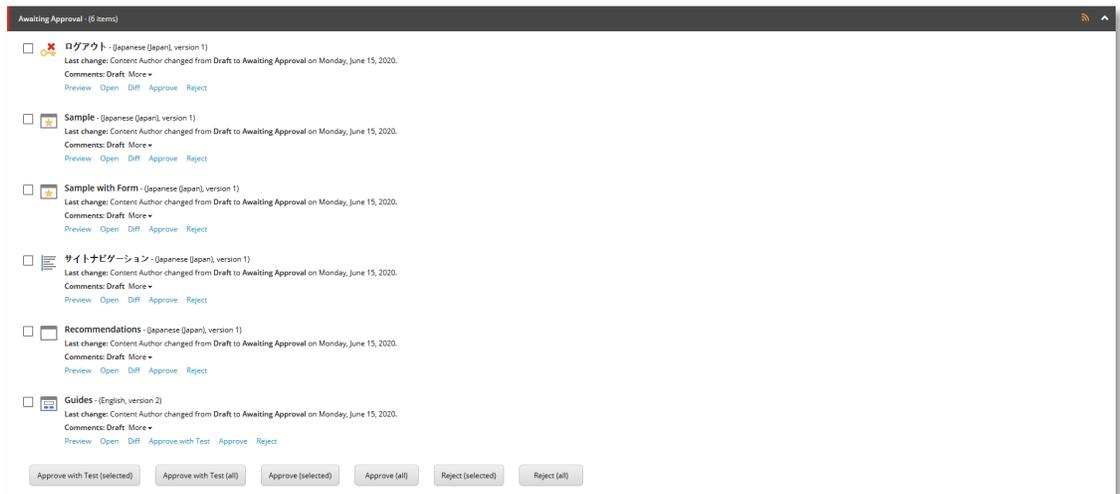
1. Log in as a Marketer with username: **Marketer**, and password: **m**.
2. On the Launchpad, click **Workbox**.



3. In the Workflows group, scroll down and select the **Demo Workflow**.

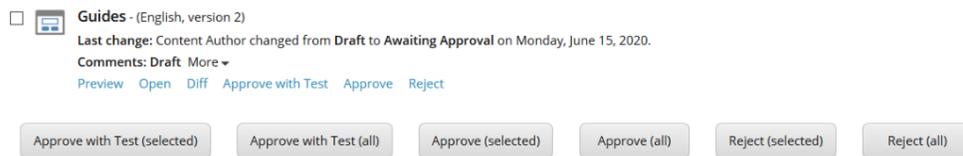


4. Explore the options available under the items in the workbox.



Here you can click **Preview** to preview the item, click **More** to see the version history and comments, click **Open** and the item will open in the Content Editor, or click **Diff** to compare the differences between two versions.

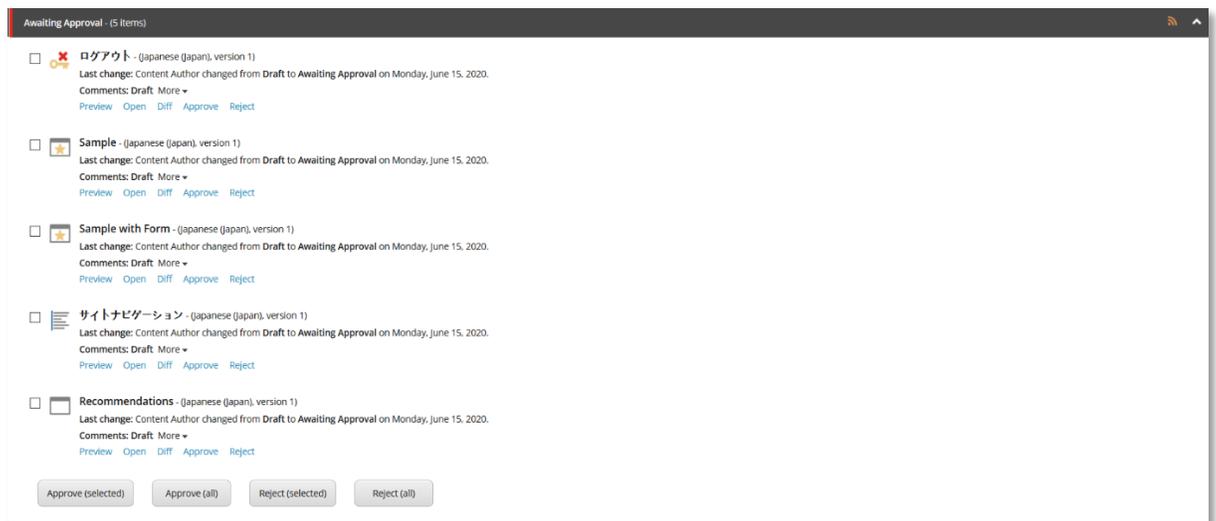
5. Select the **Guides** item, then click **Approve (selected)**.



To approve items in bulk:

In an earlier lab you submitted all the selected items for approval. Now you will select them all and move them through the workflow together along with any other items ready to be published.

1. In the Awaiting Approval state, click **Submit (all)**.



2. Return to **Launchpad** and click **Log out**. As soon as you approve the changes, the changes will be live on the website.

STOP HERE

Questions

Q1: What tool allows you to view all items in a workflow?

Q2: What does a workflow command do?

Q3: What happens when you lock and edit an item that is in a final workflow state?

Apply What You Learned

When you begin to work on your Sitecore instance:

- Find out which workflows you will be using.
- Understand what role you have and whether you will be approving content of other users.

Review

In this module, you learned about the principles and concepts around workflows. You also learned how to manage items within the sample workflow and how to approve associated content.