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Introduction

The college has adopted a Content Management System (CMS) called Sitecore. One of the benefits of Sitecore is that it allows us to produce a dynamic website. This is a vast improvement over the previous CMS, which provided a static website.

Static vs. dynamic
A static website consists of a series of HTML files, each representing an entire page of a website. Every page on the old site was a separate HTML file that was produced and placed on the server. When a user visited the page, the entire static page is called by the browser and displayed.

For a dynamic site like the current CCBC site, the CMS builds pages on the fly. Rather than having a prefabricated page, Sitecore stores all of the components for a page in its database. When the page is visited by a user it builds it just in time from all of these components and displays it to the user.

The dynamic approach has many advantages. Most notably, it allows us to manage a given piece of content as a single item, yet have it display on any number of pages throughout the site. Any time that single item is edited, the changes are reflected everywhere it is displayed on the site.

Your role
As a Sitecore user, you are part of a college-wide team of contributors and owners making updates within the CMS. As a contributor, you will be able to edit, add or delete content within the website. As an owner, you can access Sitecore to provide departmental level approval of content. The Web Management team is here to support and guide your efforts according to the established Web Content Standards and Management Procedures.

How to Use this Manual
This training manual is designed to provide a framework for using Sitecore to manage content on the CCBC website. It provides instructions for core tasks that the typical Sitecore user must be familiar with to manage his or her designated content. It is not a comprehensive user manual; however, the fundamental concepts and procedures explained here provide a foundation for new Sitecore users and serve as a reference guide for them in the future.

Getting Started: Concepts and Definitions
This section covers concepts and definitions that are foundational to working in CCBC’s Sitecore Page Editor Environment. Pages, media, user interface, content fields, and terminology are explained in this section.

**Tutorials**

Included here are user tutorials that cover what you need to know from logging in to Sitecore to editing items and updating media content.

**How to get help**

Online resources are available at [http://www.ccbcmd.edu/sitecore-resources](http://www.ccbcmd.edu/sitecore-resources). Here we have some additional documentation as well as video tutorials. These resources are hidden from public view so they will not appear in the general site search.

Since updating the website is part of a larger integrated communications strategy, it is important for your team to work closely with the College Communications Web Management Team when making significant updates to the website.

**Examples of significant updates include (but are not limited to):**

- Adding a new section to the website
- Adding new pages within and existing area
- Other changes to the information architecture, such as renaming or moving pages
- Adding video, multimedia and events
- Adding or editing a form
- Requests for additional page features, including image carousels and calls to action
- Requests for abbreviated URLs or redirects
- Requests for additional functionality requiring development work

**Who to contact**

Please contact Vanessa Pratnicki at vpratnicki@ccbcmd.edu or Melanie Myers at mmyers3@ccbcmd.edu for day to day assistance with content maintenance and Sitecore troubleshooting.

For projects such as adding a new section to the website or new functionality to a page, please contact the Web Producer, Moneca Pinkett at mpinkett2@ccbcmd.edu.
Getting Started: Concepts and Definitions

Elements of a Sitecore Page

While there are a handful of specialized pages on the site, most of pages have a standardized underlying structure. Within this basic structure are many options for how a page can be configured. The image and descriptions below explain the most prevalent elements that can exist on a typical page, including navigation types and content items.
1. **Page header**: The page header appears at the top of every page on the site. It includes the following components

   - **Utility navigation**: One click access to registration information, the CCBC Library, catalog, faculty and staff directory and frequently used student web services. This section loads on every page of the CCBC site.
   - **CCBC logo**: Official college logo linked to homepage
   - **Site search box**: Allows users to use the website's internal general site search feature
   - **Primary navigation**: Contains the highest level organizational categories for content on the site. Each tab links to a landing page and reveals a mega navigation dropdown for direct access to important content and tasks in the section.

2. **Breadcrumb navigation**: A type of secondary navigation that traces the current page back to the CCBC homepage. This helps to create a sense of "place" for the current page.

3. **Page title**: Displays the name of the current page. The page title plays an important role in optimizing the page for both internal and external search.

4. **Left navigation**: Located in the left-hand column, contains links to the main sections of the CCBC website and provides easy access to this section of the website no matter what page you are viewing.

5. **Carousel**: Displays slides containing images with optional captions above the main content area. If multiple slides are present, users can move back and forth between the images by clicking left/right arrows.

6. **Subtitle**: Is a visual queue to users regarding the content of the current page. Also important for search optimization.

7. **Main content area**: Unique content for the page exists here. **This is the center area on a page, where the majority of updates are made by content contributors/owners**. There are multiple content items ("renderings") that can be placed in the body, such as:

   - **Body copy field**: The default field for placing content at the top of the main content area. The body copy field plays an important role in search engine optimization.
   - **Accordion**: These ‘drop downs’ allow you to display a large amount of information, in a clean and space-saving arrangement.
**Orange border blocks:** Are a great way to group related, but separate, chunks of information on a page. [http://www.ccbcmd.edu/About-CCBC/Administrative-Offices/Enrollment-and-Student-Services.aspx](http://www.ccbcmd.edu/About-CCBC/Administrative-Offices/Enrollment-and-Student-Services.aspx)

**Chunk:** Similar to the body copy field, a content chunk allows copy to be placed after other renderings. For example, you would use a chunk when content is needed below an accordion.

8. **Right rail:** Located in the rightmost column of the page, this area is designed to provide a place for additional resources to supplement the primary content and tasks in the main content area. The right rail can include:

**Contact us block:** Used to display contact information for one point of contact.

**Connection block:** This block has a similar look as the Contact us block, and is primarily used to display multiple contacts within one block. Additionally the Connection block is a way to feature other content in the right rail, such as maps/directions.

**Call to Action (CTA):** Help you drive users to relevant tasks and related resource information by providing a prominent visual element. [Learn more about CTA's.](#)

**Event block:** All events created in Sitecore are tagged. Event blocks can be configured to display events on pages on the site based on these tags.

In the example below, all of these events have the tag **financial aid.** Therefore all events with that tag will show in this block. As the dates pass, the events will drop off. Typically event blocks are configured to display 4 events at any given time, but if you click on the “**financial aid tag,**” it will open a search results page including **ALL** events with this tag.
Note: Clicking on a tag will only show events with said tag.

9. **Footer**: The footer appears on every page on the site and includes links to maps, directions and general contact information, social media links and links to other important resources for various audiences.
Important Sitecore concepts and definitions

**Alias** – Provides an alternative (shorter) URL for a page.

**Content Item** – A Sitecore item that contains information or media that will appear on the published website.

**Content Tree** – The Content Tree is a hierarchical view of the content in the Sitecore system that shows child items grouped under their parents. The Content Tree Structure is displayed by default and contains the hierarchy of folders and content items comprising the site.

**Content Tree in the Page Editor**

The content tree is located in the top-left of the browser window when you log in to Sitecore. From there, you can view the information architecture for the CCBC website including your own department’s items.

Everything in the red square is part of the mega navigation. The items you will be editing will fall into one of these categories.

For more information about how to navigate through the Content Tree, view the tutorial on [Navigating using the Content Tree](#).
**Item Locking** – Prevents multiple users from editing the same item at the same time. If two or more users manage to edit the same item simultaneously, they could overwrite one another’s changes. Always be sure to check that an item is locked before editing. For more information, view the tutorial on [Locking/Unlocking the Page](#).

**Media Library** – The media library is used to store and manage media files (images and PDFs).

Similar to the structure of web pages in Sitecore, the media library has a content tree with parent/child relationships. These folders are used to house collections of individual media items (photos and PDFs) for areas of the website.

The media library is made up of several primary folders. Each major division of the site structure has its own dedicated folder nested below the CCBC parent folder. The folders are organized in the same order as the website’s main navigation. Starting with ‘Get Started’ and ending with ‘About CCBC.’

![Media Library Diagram]

It is critical that contributors keep the media library organized in a way that parallels the structure of the content tree. This allows you to keep related items grouped together and organize your media content in a way that will make it easier to retrieve or update later. In addition, always keep PDF’s and images in separate subfolders within a given section folder. For more information about the media library, view the tutorial on [Using the Media Library](#).
Page Editor – The Page Editor is a “What You See Is What You Get” (WYSIWYG) editor that allows you to see the changes that you make directly on a page. Always choose Page Editor as you are first logging into Sitecore. The tutorials in the next section of this manual, teach you how to use the Page Editor.

Rendering – A generic Sitecore term used to refer to any of the “elements” or “modules” that we can put on a page to display content. For example, Event Blocks, Orange Border Blocks, Carousels, Chunks, Contact Us blocks etc.

Ribbon – The topmost part of the Content Editor is called the ribbon. It provides access to Sitecore editing functionality. The ribbon is comprised of tabs that are segmented into groups.

Rich Text Editor – The interface that allows you to enter or modify text and links without having to use programming code.

For a complete list of Sitecore concepts and definitions, please visit the Concepts and Definitions page within our Sitecore Knowledge Base.
Page Relationships and Left Navigation

Relationships are defined by the location of a page within the content tree. The left navigation is constructed through these relationships. The terms used are parent, child and sibling pages.

Parent (landing) pages are hubs for related subject area information. They represent thematically related content in broad categories.

Child pages provide focused information detail beneath an area landing page.

Sibling pages provide related information that is relevant to other child pages within a parent page hub.

In the example above, Applying to CCBC, which is highlighted in red, is the parent page and everything beneath it (inside the red square) is a child page within the Applying section.

All of the ‘child’ pages under Applying to CCBC are siblings of each other. From Current High School Student down to Admissions Office.
Main Content Area

All templates have a body copy area for adding text, images, and links. The body copy is where the majority of the work takes place in Sitecore. The Rich Text Editor (RTE) provides controls for editing images, links, and text. These controls appear on a ribbon at the top of the RTE window and will appear familiar to users of Microsoft Office.

From left to right

- Print
- Find and Replace: search and replace functionality that is very similar to Microsoft Word
- Cut
- Copy
- Paste Plain Text: removes all formatting when pasting content into Sitecore. This functionality is intentionally designed to remove formatting that could break website styles. See tutorial below for more information about pasting content into Sitecore.
- Undo
- Redo
- Insert Sitecore Link: creates an internal link to another Sitecore page or an item in the Media Library. This is the preferred linking method for Sitecore, since it is more resilient and will maintain links if content is moved, renamed, or otherwise updated.
- Media Library: media that was previously uploaded within the Sitecore Media Library.
- Hyperlink Manager: creates/manages links to websites outside of Sitecore (including other web properties within www.ccbcmd.edu), on the page links, and email.
- Remove Link
- Insert symbol:
  - Bold
  - Italic
  - Underline
• Align Left
• Align Center
• Align Right
• Justify
• Remove Alignment
• Numbered List
• Bulleted List
• Indent
• Outdent
• Strikethrough
• Subscript
• Superscript
• Select all
• Spellchecker: spell checks text in the body copy
• Help: opens window with RTE function descriptions
• Apply CSS: where you can add pre-styled headers and intro text

• Size
• Zoom
Call to Action

A great feature of the website is the ability to incorporate a Call to Action (CTA). These renderings can be used to drive users to relevant tasks and related resource information by providing a prominent visual element on the page.

1. Graduate on time with DegreeWorks!

2. Request more information

3. Additional advising resources
   - Take the placement test
   - Plan for transfer
   - Get your transcript
   - Earn academic credit for work and life experience

4. Apply now

Types of CTA’s:

1. Red CTA w/image
2. Red CTA without an image
3. Yellow list CTA
4. Yellow CTA

To add a call to action to a page you are editing, contact the Web Management Team for assistance.
Sitecore Tutorials

Logging into Sitecore

Sitecore is a web application, the only software that you need to have installed on your computer is a supported web browser. **Compatible browsers are Google Chrome or Firefox.** Do **not** use Internet Explorer – this browser is not compatible.

1. **Access the Sitecore editor:** [https://cwscprcm1.ccbc.ccbcmd.edu/sitecore/login](https://cwscprcm1.ccbc.ccbcmd.edu/sitecore/login)
2. Enter your **CCBC** username (include ccbcmd\) and password.
3. Select the **Options** link and then select **Page Editor** and then select **Login**.

**Please Note:** The above URL links to the production server. In order to be granted access to this server, you will need to successfully complete the CCBC Sitecore Training and pass the assessment.

**Always remember to logout of Sitecore when you are done.** Our Sitecore license allows only a limited number of concurrent users. If you do not logout, you are potentially keeping another user from accessing the system.
Navigating using the Content Tree

The first page to load is the CCBC homepage. You will need to navigate using the content tree to the items that you are responsible for editing.

**Note:** Even though you will see all items in the tree, you are only able to make edits to the content items for which you have designated responsibility.

1. Expand the ribbon and check off ‘navigation bar’ in the View tab in order to see the Content Tree.

2. To locate the page that requires edits, select the arrow next to ‘CCBC’. From the drop down select the appropriate section.

3. Continue this process until you locate the desired page.
4. Select ‘Go’ once you have located the page containing the item that requires edits.
How to edit the page

After navigating through the content tree to the desired page, you can begin your edits. Most of your edits in Sitecore will consist of editing the existing “body copy” field of a typical page.

The areas of the page that you can edit will be highlighted with a border when you hover your mouse over the field (as noted in the image below). When you click inside the box, you can make changes to the existing content.

Locking/unlocking a page

Before you begin editing a page in Sitecore, you first must lock the page. This ensures that while you are editing this page, no one else can make edits. In situations where multiple contributors have access, this means that another contributor can’t work on the same page simultaneously and overwrite any updates you have made.

To lock the page, select the lock icon. You will notice that when a page is locked, the lock icon is highlighted in orange.
When a page is unlocked, the icon is **not** highlighted.

To unlock a page, select the **lock** icon. To unlock the other items on the page, such as CTA’s, contact us blocks, or accordions, select **My Items** in the ribbon.

A new dialog window will appear. If additional item are locked, they will display here. Select **unlock all** and then **close**.
Once you have completed all of the changes needed to a page, you must **unlock** the page before logging out of Sitecore. Simply logging out of Sitecore does **not** unlock the page.

This is especially critical if there are multiple contributors to one page. If a page is locked by a user, that means no one else other than the user who locked the page can make any edits.

**Making changes to the body content**

There are two ways in which you can edit the content in the body field.

**Option #1:** Place your cursor in the body field to type, edit, or delete any of the content directly on the page. You will also be able to bold, italicize, underline words or add a hyperlink with this option.

![Rich Text Editor (RTE)](image)

**Option #2:** Select the paper icon on the far left (in red below). Clicking on this icon will prompt the **Rich Text Editor (RTE)**.

![Rich Text Editor (RTE)](image)
The Rich Text Editor will open with all of its controls for pasting, modifying text, links, and media. All of the tools you can utilize are in the ribbon at the top of the RTE. Once finished with editing, click on ‘Accept’ in the lower right-hand corner to close the window.

Use the ‘Reject’ option if you do not wish to apply your changes.

**Note:** Clicking on ‘Accept” does not save your work. You will still need to select save in the ribbon located on the top-left.
Pasting text

Sitecore has a function in the Rich Text Editor (RTE) called “Paste Plain Text” that removes all formatting for pasted text. Formatting must be completed within Sitecore using the RTE for the content to display properly.

Pasting as plain text is designed to remove formatting that will cause your content to display incorrectly or in some cases not display at all.

Follow these steps to paste text from another source, such as a Word document:

1. Copy the text from your source.
2. Navigate to the page and lock the page.
3. With your cursor, click on the text field you wish to edit.
4. Select the paper icon to open the RTE.
5. Place your cursor where you want to paste in the RTE window.
6. Click on the paste as plain text icon.

7. In the new dialog window, follow the instructions to paste text, and then select paste.
8. Use the RTE ribbon controls to create any other necessary formatting.
9. Select Accept in the lower right corner of the RTE window.
10. Select the save icon on the top left corner on the ribbon.

Paste as plain text feature does not work in Internet Explorer. You must use Chrome or Firefox.

Do not paste text intended for a print document directly into a web page and leave it at that. Writing for the Web is very different from writing for print. A web user needs concise, scannable copy. Refer to the CCBC Web Content Standards for guidelines on developing web content.
Creating internal and external links

When setting up a link, you need to know whether the link is to an item within Sitecore or to another website outside of Sitecore.

**Internal links** are those that point to pages on the CCBC website that live within the content tree in Sitecore. All web pages with URLs that begin with ‘www.ccbcmd.edu’ are Sitecore pages.

**Links to Sitecore pages must be configured as internal links.** Sitecore has the ability to manage its internal links. If an item is deleted, we will be notified which links are affected. This helps to insure that no broken links are on the site. However, if you create an external link to a Sitecore page and this page is subsequently deleted by someone else, Sitecore will have no way of alerting us that the link is now broken.

**External links** connect to pages that are not part of the CCBC website and do not ‘live’ in Sitecore.

Refer to the [CCBC Web Content Standards](#) for guidelines on how to use, maintain and label links.

**Follow these steps to set up an internal Sitecore link:**

1. Know what page you would like to link and where it is in the content tree.
   
   If you’re unsure where on the content tree the page lives, you can always refer to the breadcrumb navigation on the website for help. The breadcrumbs are always located above the page title.

   ![Breadcrumb Navigation](#)

   *In this example, the Ask an Advisor page is within the Resources for Students section and then Academic Advisement.*

2. Let’s setup an internal link to Get Started. Select the **paper** icon to open the rich text editor.

3. Highlight the text you wish to link with the cursor.
4. Click on the ‘Insert Sitecore Link’ icon in the RTE.

5. In the new dialog window, navigate to the page in the content tree and select the item to highlight.

6. After selecting the page you wish to link to, select Link in the bottom right hand corner of the window.

7. The link will display in the body copy. Click on Accept in the bottom right corner of the RTE window.

8. Select the save icon on the top left corner on the ribbon.
External links connect to pages that are not part of the CCBC website and do not “live” in Sitecore. Even though a URL may include CCBC web properties, these are still considered external sites, such as:

- SharePoint (https://ccbcsharepoint.ccbc.edu)
- myCCBC (https://myccbc.ccbc.edu)
- Blackboard (https://ccbcmd-bb.blackboard.com)
- SIMON (https://simon.ccbc.edu)

Follow these steps to set up an external link:

1. Open the website you wish to reference on your page and copy the entire URL.

![Image of copied URL]

2. Select the paper icon in the body field to open the Rich Text Editor (RTE).

![Image of RTE]

3. Highlight the text you wish to link with the cursor.

4. Select the Hyperlink Manager icon in the RTE.

![Image of Hyperlink Manager]

5. In the new window, paste the address of the website you want to link in the URL field.

![Image of Hyperlink Manager window with URL pasted]
6. In the Target field, select **New Window** from the drop down.

7. Select **OK**

8. The link will now show in the body copy. Click **Accept** in the lower right corner of the RTE.

9. Select the **save** icon on the top left corner on the ribbon.

If you add external links to your content, you should be diligent in checking to make sure that source has not been deleted or moved.

**Removing links in Sitecore**

**To remove a link** (internal or external), place your cursor within the link text and right click to choose **Remove Link** in the RTE.

**Creating a link to an email address**

You can also create email links which will open up a blank email addressed to a predesignated address. Setting up a link to an email address in the RTE is very similar to creating external links.

**Follow these steps to add an email link:**

1. Know the email address you wish to link on the page. For example, `yname@ccbcmd.edu`

2. Select the **paper** icon in the body field to open the Rich Text Editor (RTE).

3. Highlight the text you wish to link with the cursor.

4. Select the ‘Hyperlink Manager’ icon in the RTE.
5. In the new dialog window, choose the “E-mail” tab.

6. In the Address field, type or paste email address.

7. Select OK

8. The link will now show in the body copy. Select Accept in the lower right corner of the RTE.

9. Select the save icon on the top left corner on the ribbon.
Using the Media Library

The Media Library is used to store and manage media files (images and PDFs).

Similar to the organization of web pages in Sitecore, the media library has a content tree with parent/child relationships. These folders are used to house collections of individual media items (images and PDFs) for areas of the website.

The media library is made up of several primary folders. Each major division of the site structure has its own dedicated folder nested below the CCBC parent folder. The folders are organized in the same order as the website’s main navigation. Starting with ‘Get Started’ and ending with ‘About CCBC.’

![Media Library Structure]

It is critical that contributors keep the library closely organized in a way that parallels the structure of the content tree. This keeps related items grouped together and organized so that media is easier to locate. In addition, always keep PDF’s and images in separate subfolders within a given section folder.
In the example below Campus Life & Activities is expanded on both the content tree (left) and media library (right). There is a subfolder for all of the parent pages within Campus Life & Activities.

Each folder from Get Started through About CCBC contains folders for the parent and child pages within each respective section. As the side-by-side image shows, the media library does closely mimic the content tree.

If a folder is needed in the media library or an item needs to be removed/deleted, please contact The Web Management Team for assistance.
How to manage PDF’s

When it comes to managing/maintaining PDF’s in Sitecore, it’s important to understand two separate processes: *uploading a new PDF and replacing an existing PDF.*

The process for each is quite different and it is important to know the difference between the two processes. If done incorrectly, it may cause multiple versions of the same PDF to be placed in the media library.

**Upload a PDF when** the PDF is not currently on the CCBC site. Only after you have verified that the PDF is not in the media library you can upload the PDF. Never upload a PDF into the media library without first checking to make sure a version of it doesn’t already exist, skipping this step can lead to having multiple versions of the same PDF on the site.

**Replace a PDF when** you have an updated version of a PDF that is currently on the CCBC site. Replacing this PDF will ensure that the PDF is updated no matter where it is linked from. Replacing this one PDF will update it throughout the entire site.

Updates to the PDF will not be published/visible to the live site until the Web Management Team approves the PDF. Please allow for 2-3 business days.

How to access the Media Library to determine if a PDF is already in the Media Library

Before uploading or replacing a PDF, *always* check to make sure there is not already an existing PDF. Do not upload multiple versions of the same PDF.

**Follow these steps to access the Media Library:**

1. Navigate to any page that you have permission to edit in the content tree.
2. With your cursor, click on any text field.
3. Select the **paper** icon to open the Rich Text Editor (RTE).
4. Select the **Media Library** icon in the RTE

![Media Library Icon](image)

5. This opens the Media Library. Expand the folders to locate the PDF that needs updating.

   If the PDF **IS NOT** in the Media Library, you can proceed with uploading a new PDF.

   If the PDF **IS** in the Media Library, follow the instructions for replacing an existing PDF.
How to upload a new PDF and link it from a page

Once you have determined that the PDF does not live in Sitecore, you may follow the steps to upload the PDF.

Before following these steps, make sure the file name of the PDF you will be uploading is concise, has no spaces and does not include years in the title. The name of the PDF in Sitecore will be the same as it is named on your machine.

Follow these steps to add a new PDF to the page:

1. Follow the steps the [access the media library to determine if the PDF already exists](#). If the PDF is not in the media library, continue to step 2.

2. Navigate to the appropriate page in the content tree and lock the page.

3. With your cursor, select on the text field you wish to edit.

4. Highlight the text you wish to link.
   
   a. Skip this step if you do not wish to link to the PDF

5. Next, select the [Insert Sitecore link](#) icon

6. Select the [Media Items](#) tab and expand the [CCBC](#) folder.
7. Continue to expand the folders until you get to the desired location to place the PDF. Select **Upload**. Make sure you select the **folder** of where you are placing the PDF. Do not select a PDF.

![Insert a Link](image1.png)

8. Select ‘**Choose File**’ and locate the PDF saved on your computer.

![Upload a File](image2.png)

9. The file is now ready. Select **Upload**.

![Upload a File](image3.png)
10. In the dialog window, select **Lock and Edit** and then **Save/Close**.

11. You will now see the PDF you just uploaded highlighted in blue. You can now select **Link** if you wish to create the link to the PDF. If you are not creating the link you can select **Cancel** to close the dialog window.

12. If you are in the RTE, click **Accept** in the lower right corner of the RTE.

13. Select the **save** icon on the top left corner on the ribbon.
Replacing an existing PDF file

Sitecore makes it easy to update your current media items with new versions. Rather than have two copies of the same PDF in the media library — making it difficult for visitors and other contributors to know which one is correct — you can replace the old one seamlessly, while ensuring that links in Sitecore are also up to date.

**Note:** Follow these steps regardless of where the PDF is located on the page. So for example, if you are replacing a PDF located in a CTA, you still follow these steps.

Follow these steps to update an existing PDF to the page:

1. Navigate to any page that you have permission to edit in the content tree.

2. With your cursor, click on any text field.

3. Select the **paper** icon to open the Rich Text Editor (RTE).

4. Select the **Media Library** icon in the RTE.

5. Locate and select the PDF that you are replacing.
6. Click 'Edit.'

7. In the dialog window, select **Lock and Edit** at the top of the window.

Do **not** click on upload. If you need to [link to or upload a new PDF](#), close this window and select the **Insert Sitecore link** icon.
8. In the Media section select, **Detach** to remove the old PDF file from the media item.

![Detach screenshot]

9. Select **OK**. This is removes the current PDF.

Do not close the dialog window yet. You need to **Attach** a PDF first.

10. Now select ‘**Attach**’
11. Select Choose File

12. Locate the updated PDF on your computer and select **Open**.

13. The PDF is ready to be attached. Select **Attach** to complete the process.

14. Select **Save and Close** to close the dialog box.
You have updated the PDF. Select ‘Cancel’ to exit the Insert Media Item dialog box.

Select ‘Accept.’ Clicking accept does not save your work. Before exiting Sitecore, click on the save icon in the ribbon of the Page Editor.

Updates to the PDF will not be published/visible to the live site until the Web Management Team approves the PDF. Please allow for 2-3 business days.
How to edit other items on the page

There are some Sitecore pages that feature one or more additional content renderings on the page. These might be accordions, contact us blocks, calls to action, carousels and so on. Not all pages have—or need to have—every rendering on them. Renderings can only be added or removed from a page by the Web Management Team as content, architecture and user experience concerns dictate.

In some cases, for technical reasons, only the Web Management Team can make edits to certain types of renderings, such as the carousel (1), but there are other items that contributors maintain. These include the contact us block (3), accordion (2), red CTA (4) or yellow list CTA (5).

Additional renderings that may be on a page:

- Orange Border Block
- Connection Block
- Chunk (2nd Body field)
- Youtube video*
- Facebook feed*
- Events*

* indicates that only the Web Management Team can edit and manage these items
Edit a Contact Us Block

Some contributors will be designated to maintain one or more Contact Us blocks as part of their assignment. You will be able to edit the person’s name, their title at CCBC, the phone number and the email address.

To make an edit to this block, click on the field you wish to change.

You will see a text cursor indicating you can begin editing the content. In the example below, we’ve deleted the word ‘Manager’ and added ‘Test.’

There’s no need to use the Rich Text Editor since the formatting for this block is specified.

If the office location needs to be updated, contact the Web Management Team for assistance. Since this field is tied to Google Maps, we will have to make the adjustment.
**Edit an accordion**

Making content edits to an accordion is very much like editing the body field. Select the accordion to expand it and then click anywhere within the text to begin editing.

You can also edit the accordion in the Rich text Editor as well (again just like the body field). Select the paper icon to open the editor.

In the Rich Text Editor, make all of your edits. Select **Accept** (bottom right) when you are finished updating content. Remember to save your work!
Edit a Call to Action (CTA)

A useful feature of the website is the ability to incorporate a Call to Action (CTA). These renderings can be used to drive users to relevant tasks and related resource information by providing a prominent visual element on the page. This feature provides great flexibility for content contributors and an improved user experience. Many pages have a CTA of some kind. Typically a Red CTA or Yellow List CTA.

**Edit a link label in a CTA**

1. Click on the text to place your cursor. Delete or edit the existing text.

**Edit an external link in a CTA**

1. Click on the text of the CTA.
2. Select More, then select Edit the related item.

This will split the screen.
3. Select **Lock and Edit**.

4. Scroll down to the **Links** section to edit the link.

![Image of the interface with a red box highlighting the area for selecting a link.]

**Note:** you can toggle the up/down arrows (red box to the left in image below) to make the screen larger.

5. In the **Links** section, select **Insert External Link**.

![Image of the interface with a red box highlighting the area for inserting an external link.]

6. In the URL field, type or paste the web address of the website you want to link. Leave link description blank.

![Image of the interface with a red box highlighting the area for inserting an external link.]

You must include 'http://' otherwise it is possible the link will not work. In the Target field, select **New Window** from the drop down and select **OK**.
7. Select **Save/Close** at the top of the screen. This will save your work and close the split screen to take you back to the Page Editor.

![Save/Close button](image)

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**Edit an Internal link in a CTA**

In some cases you will want to edit a link to another page on the CCBC website.

**Follow these steps:**

1. Click on the text within the CTA.
2. Select **More**, then select **Edit the related item.**
3. Select **Lock and Edit** at the top of the page.
4. Find the **Links** section (you will need to scroll down).
5. Select **Insert Link**.
6. In the new dialog window, expand **Sitecore, Content** and then **CCBC**. Continue expanding until you get to the page you wish to link to.
7. Select the desired page and then select **Insert Link** in the top right corner.

8. Select **Save/Close** at the top of the screen. This will save your work and close the split screen to take you back to the Page Editor.

9. Save as you normally would in the Page Editor (save icon, top left).

**Edit a link to a PDF in a CTA**

You may need to change a link to point to a different PDF that already exists in the Media Library.

**Follow these steps:**

1. Click on the text within the CTA.

2. Select **More**, then select **Edit the related item**.

3. Select **Lock and Edit** at the top of the page.

4. Find the **Links** section (you will need to scroll down).

5. Select **Insert Sitecore Link**
6. In the new dialog window expand **CCBC**. Continue expanding until you location the appropriate section.

![Image of CCBC expansion]

7. Select the **PDF** and set the **Target window** to **New browser**.

8. Select **OK** in the bottom right.

9. Select **Save/Close** at the top of the screen. This will save your work and close the split screen to take you back to the Page Editor.

![Image of Save/Close button]

10. Save as you normally would in the Page Editor (save icon, top left).
**Edit an Orange Border Block**

An Orange Border Block is another rendering we use in some cases to provide visual separation between related content. These renderings have an orange border around the text and a pale blue header.

Editing the Orange Border Block is exactly the same as editing an accordion or body text field.

Click anywhere on the text with your mouse and you will immediately be able to edit the content right there, or use the Rich Text Editor.
How to edit a Connection Block

The connection block is close in appearance to the contact us block. The connection block is used to display multiple contacts or other, more complex content within one block.

In the example below, we list out various locations on each campus for Tutoring Services. Note that the blue title for Contact Us looks identical to the contact us block. The Web Management Team can assist you in changing this label as necessary.

Editing one of these blocks is very similar to editing a body field, accordion, or orange border block. Click on the text and begin editing right on the item, or as indicated below, select the paper icon to pull up the Rich Text Editor.
How to submit your page for approval

Once you are satisfied with all of your edits to an item, you will need to submit it through the designated workflow for approvals. There are two workflow roles to which users will be assigned in the Sitecore CMS.

A **content contributor** - can access Sitecore to add, edit, or delete content.

A **content owner** - can access Sitecore to provide departmental level approval of content.

In some cases, these roles may be the same person, but typically as a contributor, there is a designated content owner who will need to approve your work first before it’s sent to the Web Management Team for final approval and publication to the website.

When you select ‘approve’ on a page it is **not** published on the website until it comes to the Web Team for final approval. Even though Sitecore will send out email notifications to members of a workflow, know who your content owners are and communicate with them as well especially if you have a page that needs to be published quickly.

**Be absolutely sure that your page is ready for publication.** Once submitted to the workflow, you will not be able to edit it again until it is either sent back to you for revision by an approver or published to the website as you initially submitted it.

**Steps to get your content published:**

1. If you have access to a page, you will see a message similar to the one in blue below. It will indicate that you can begin editing.

2. As you work on your content, save periodically.
3. After the first save, you will notice a new **workflow state**. The message will be unique to your department. There is now also an **Approve** option. You can continue editing and tweaking the content as long as you want.

4. Once you have completed all of the edits, [unlock the page](#), and then select **Approve**. This will push it to the next step in the approval process.

5. A window will pop-up after clicking on Approve. You can enter a comment if you want, but it is not required. This comment will be included in the notification email sent to the next approver. Select **OK**.

   *If you clicked approve by accident, please click Cancel to opt out.*

6. Now your item is in the hands of the content owner to approve. You will see a blue message similar to the image below. While the page is in this workflow state, you **cannot** continue to make edits.
An email will be sent to the content owner informing them of a page that needs their approval. He/she will need to login, navigate to the page and review the changes, then either approve or deny (reject it for further editing).

Once the content owner approves an item, it is pushed to the final approval step and the Web Management Team is sent a notification email. The workflow state will again change, this time indicating its awaiting final approval.

The Web Team will review and either approve or deny the item. If the item is approved, then it will be published to the live website. An email will also be generated to let the contributor and owner know of the approved item.

If a page is denied, then the contributor and owner will be notified via email with corrections to be made. The contributor or owner will be able to make any additional edits and then submit for approval again.

Once the page is approved, it is published onto the live website. Now that the item has been published, the workflow is reset and you will be able to make edits again as necessary.
Sitecore notification emails are sent from CCBCWorkflow@ccbcmd.edu. Do not reply to these email. This is an automatically generated email by Sitecore. If you reply, the Web Team will not receive the message.