



orchestraCMS™

OrchestraCMS Installation, Configuration and Administration

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Administrator Training Overview



This document is intended to prepare Salesforce Administrators, or other users familiar with the Salesforce platform, to manage an OrchestraCMS installation.

OrchestraCMS is a Content Management System that can be installed into the Salesforce.com platform to allow non technical users to manage the day to day modifications of content on a website, community or intranet hosted on Salesforce.com.

Acquiring an ORG for training

Your instructor will supply logins and passwords for each attendee to use for their own Salesforce training instance. This training instance will last 28 days and cannot be extended.














The collateral files for this course (**User Code Samples.zip**) can be downloaded from <http://www.stantive.com/TrainingCollateral>.

Note	Some of the steps in these exercises can only be performed by users who have been assigned the Salesforce System Administrator profile. If you choose to do these steps in an Org that is not yours, you may not be able to complete these exercises.
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OrchestraCMS Extensions

Stantive offers an add on package that extends the core content types within OrchestraCMS to include:

- Bookmarks
- Ideas
- User Stories
- Salesforce Library Content
- Salesforce Chatter
- Salesforce Records listing and details
- RSS Feeds
- Google Searching (a search box that lets users issue a search to Google)
- Articles
- Taxonomy filtered content search
- Slider Carousel

Setup	Content Types
Core Types	
Name	Label
Carousel	Carousel
Data	Data
Form	Form
List (Dynamic)	List (Dynamic)
List (Fixed)	List (Fixed)
Media	Media
Menu	Menu
Portal	Portal
Search	Search
Taxonomy	Taxonomy
Text	Text
Utility	Utility
Custom Content Types New Content Type	
Name	Label
 Article	Article
 Bookmarks	Bookmarks
 GoogleCustomSearch	Google Custom Search
 Languages	Languages
 ListView	List View
 RSSFeed	RSS Feed
 SalesforceChatter	Salesforce Chatter
 SalesforceContent	Salesforce Content
 SalesforceDashboard	Salesforce Dashboard
 SalesforceIdeas	Salesforce Ideas
 Slider	Slider
 Taxonomy-filteredContentSearch	Taxonomy-filtered Content Search
 UserStory	User Story

Applying Updated Packages

The following packages will need to be applied to the org you are supplied in order to bring the software to the current release. The patch process is straightforward and all the default options can be used. Do not apply these packages in a production org without first consulting with Stantive Customer Support. To apply the package **make sure you are logged into the training image organization and not your company's Salesforce org** and then paste the below URL into the address bar of your browser and press Enter. You will receive an email notification when the updated package installation is complete. Once you get the notification you can update the OrchestraCMS Extensions package in the same fashion.

OrchestraCMS

<https://login.salesforce.com/packaging/installPackage.apexp?p0=04t2E0000016HJU> (Build 8.231)

OrchestraCMS Extensions

<https://login.salesforce.com/packaging/installPackage.apexp?p0=04t1Y000001I9N8> (Build 3.4.4)

Upgrade OrchestraCMS
By Stantive Technologies Group Inc.

i An earlier version is installed. It can be upgraded while preserving the existing data.
Installed: Spring '15 7.1 (7.89) New Version: Summer-15 7.2 (7.124)

☒ Install for Admins Only ☐ Install for All Users ☐ Install for Specific Profiles...

Upgrade **Cancel**

App Name	Publisher	Version Name	Version Number
OrchestraCMS	Stantive Technologies Group Inc.	Summer-15 7.2	7.124

Description
Create and manage your communities, intranets, portals and websites with OrchestraCMS - the premier web content management system for Salesforce.

Additional Details [View Components](#) [API Access](#)

When applying updates select the **Install for Admins Only**. OrchestraCMS will handle assigning permission sets to users who are provisioned access to the application. Package update URLs can be requested from Stantive support. When requesting a package update please let support know the currently installed version so they can schedule an upgrade if any

manual intervention is required to update from your current version to the latest package. This is not usually required for minor updates.

Updated packages cannot be rolled back. It is recommended that you apply any updated packages to your sandbox first before applying them to your production organization. Testing the updated package should primarily involve ensuring the visitor experience to your site is not impacted by the updated package. This includes a full slate of UAT testing of the visitor experience to your websites managed by OrchestraCMS.

Initial Salesforce Configuration for OrchestraCMS

While waiting for the OrchestraCMS installation acknowledgement email, you can perform the following steps in Salesforce:

1. In Setup, expand **Security Controls**.
2. Click on **Remote Site Settings**.
3. Click the **New Remote Site** button.

Note

Use of these specific name is not required but will assist support if future troubleshooting is required.

4. Set the Remote Site Name to **OrchestraCMSSync**.
5. Set the Remote Site URL to <https://stantive.secure.force.com> .
6. Ensure the **Active** checkbox is selected.
7. Click **Save**.

Note

This setting is used to authorize calls to the Stantive licensing service. Without this setting you cannot activate licenses other than the initial 30 day trial package within OrchestraCMS. At the end of thirty days the sites created continue to function but you can no longer access OrchestraCMS to make site updates.

Setting up sites for use with OrchestraCMS

OrchestraCMS supports three types of sites for use with Salesforce.com:

- Intranets accessible only from within Salesforce to users who have a Salesforce login that allows them access to the Salesforce org
- Force.com sites which are publicly accessible but do not offer authentication
- Communities which provide both internal Salesforce.com users and Salesforce community licensed users a shared space for accessing pages and content, in addition to public access for non authenticated pages and content.

Note

Salesforce licensed users cannot use their credentials to log into or be authenticated by a force.com site. This means none of the features of OrchestraCMS that take advantage of authenticating users can be applied to Salesforce users via a force.com site. (ie. Chatter, Targeting, Sharing...)

Note

OrchestraCMS does not support converting one type of site into another type of site. Additionally no method is currently provided for copying or moving content and pages from one site to another. If you incorrectly select the wrong kind of site and create the pages and content, you will need to recreate them if you need to switch the type of site later.

An additional consideration in selecting the type of site to use is the concept of Salesforce Page Views. Salesforce allows for a certain number of page views depending on the Edition of Salesforce you have subscribed to.

The key to page views is that any **unauthenticated** request for a page or resources on the page counts against your Salesforce organization's Page View Limit. Requests exceeding this limit may be billable by Salesforce. This means that OrchestraCMS Intranets do not count against your Salesforce page view limit since they are only accessed by authenticated users.

Additionally, any pages visited by users who have been authenticated with a Customer Community or Partner Community Salesforce license also do not count against your Salesforce page view limit.

For more information on Salesforce page views, you can visit https://help.salesforce.com/HTViewHelpDoc?id=sites_limits.htm&language=en_US.

For the purposes of these exercises we will set up one of each type of site.

Configuring a force.com site for use with OrchestraCMS

The key to having a site managed by OrchestraCMS is to set the Active Site Home Page to the “Main” page in the cms namespace. This page is part of OrchestraCMS and allows OrchestraCMS to handle requests to the site.

1. In Salesforce Setup, expand **Develop**.
2. Click on **Sites**.
3. Because this org is created from an image the domain field will be prepopulated with a unique auto generated value, click the **Check Availability** button.
4. Accept the **Site Terms of Use** and click the **Register My Force.com Domain** button.
5. When the domain is registered, you will be directed to the Sites screen, where you can create a force.com site. This is typically accessed in Salesforce Setup by expanding Develop and clicking **Sites**.
6. Click **New**.
7. Select the **Guest User License** option.
8. Press Continue.
9. Enter the following details for the Site Edit dialog:

- Site Label : Site1
- Site Name : Site1

Note

Make sure you have the Site Name you want as you cannot change it later. Renaming it will invalidate your site records in OrchestraCMS. The domain name can be changed at any time but the Site Name should not be changed.

- Site Description : Public Website managed by OrchestraCMS
- Site Contact : Leave as your username
- Default Web Address : Leave as default
- Active : Selected
- Active Site Home Page : Main

Note

The Visualforce page Main is provided as the incoming point to handle page requests for sites managed by OrchestraCMS

- Inactive Site Home Page : ErrorMaintenance
- Site Template : *Clear this field*

- Site Robots.txt : OrchestraCMSRobots

Note	This sets the Visualforce page OrchestraCMSRobots as the robots.txt file for the site. The rules in this file instruct the search engines to index all areas of your site. You can use a custom page if you want different rules.
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- Site Favorite Icon : *Leave blank*
- Analytics Tracking Code : *Used for Google Analytics. Leave Blank.*
- URL Rewriter Class : OrchestraCMSRewriter

Note	Without the OrchestraCMSRewriter enabled on the site the URL would be http://domain.com?cms__Main&sname=sitename&name=pagename . Enabling the OrchestraCMSRewriter modifies the URL for your site to the expected format of http://domain.com/pagename .
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- Enable Feeds : Unselected
- Clickjack Protection Level : Allow framing by same origin only
- Require Secure Connection : Unselected

10. Click **Save**.

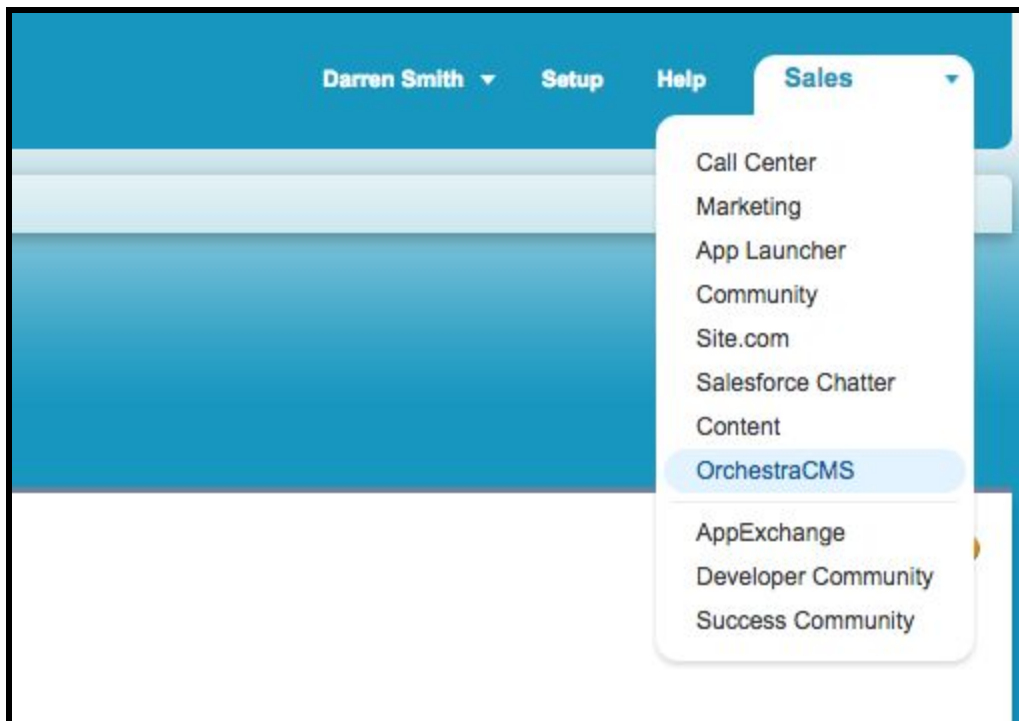
11. On the Site Details screen, scroll down to the Error Pages section.

12. Click the **Page Assignment** button. For each of the error pages listed, in order to have OrchestraCMS show your branded error pages, you need to set the associated page as indicated in the list below, and then click **Save**.

- Authorization Required Page : ErrorAuthorizationRequired
- Limit Exceeded Page : ErrorLimitExceeded
- Maintenance Page : ErrorMaintenance
- Page Not Found Page : ErrorFileNotFound
- Generic Error Page : ErrorGeneric

Note	The Service Not Available error page cannot be served by OrchestraCMS as it is served up when Salesforce is in a maintenance window. You must create a Static Resource in Salesforce to provide this page. Salesforce provides instructions for this.
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At this point the site is ready to be added to the OrchestraCMS application. From the Salesforce App menu, choose:



You will be presented with the screen below. Any user trying to access the application who has not been added as a licensed OrchestraCMS user (covered later) will be presented the same screen excluding the set up new site wizard link.



1. Click the **set up new site wizard** link.
2. Since you are adding a site that will be hosted on a Force.com site, it is considered to be an external website. Click the **Salesforce Site** link.
3. From the Site Label drop down, choose the site you have just configured.
4. When creating a site, you must set a Default Language for the site even if you are not using the Multilingual features of OrchestraCMS.

- The list of languages presented comes from the languages configured in Salesforce Setup, under Company Profile, in Language Settings. Choose English from the list of languages and in the blank label field enter **English**. The Default Language can be changed later in the site's configuration if needed. Additional languages can also be defined at a later time.
5. Click **Install**.
 - This will take you to the OrchestraCMS user interface. Use of this interface is covered in the OrchestraCMS User Training package.

Configuring a Salesforce Intranet for use with OrchestraCMS

An intranet is the OrchestraCMS term for a site accessible solely through Salesforce via a tab within a Salesforce application. There is no force.com site or community associated with an OrchestraCMS Intranet. When creating an OrchestraCMS site that will only ever be accessed by users who have access to Salesforce it is an Intranet that you should create. To make it available you should

- Create a Salesforce App
 - The Salesforce App exposes a Salesforce Tab
 - The Salesforce Tab points to a Visualforce page (required)
 - The Visualforce page calls an Apex class (required)
 - The Apex class redirects to the OrchestraCMS Main page to display the site (required)
1. From within OrchestraCMS, click the globe icon in the top right of the screen and select **Create New Site**.
 2. Select the **Salesforce Intranet** link.

Note

Site names cannot be changed later. Once assigned a site name cannot be reassigned. Content and pages created within a site cannot currently be migrated to another site.

3. Set the Site Label and Site Name fields to **Intranet**. These can be any label but should:
 - Contain only letters, numbers and underscores.
 - Begin with a letter.
 - Cannot contain two consecutive underscores.
 - Cannot end with an underscore.
 - Cannot contain spaces.
 - Must be unique from any other sites, intranet or otherwise.
4. Set the Default Language to **English**.
5. Click **Install**.

6. You will be taken back into OrchestraCMS. In order to configure access to the Intranet site from within Salesforce, you will need to select **Back To Salesforce** from the user icon in the top right of the screen. This will open Salesforce in a new browser window or tab.
7. Close the OrchestraCMS tab or window and switch to the Salesforce tab or window.
8. In Salesforce Setup, expand Develop.
9. Click on **Apex Classes**.
10. Click **New**.
11. Copy the code from the IntranetClass.txt file from the User Code Samples.zip and paste it into the dialog in Salesforce. You need to replace **SiteName** with the name you assigned your Intranet. In this case the value would be **Intranet** . It needs to exactly match the the name you assigned the intranet site you just created in OrchestraCMS.
12. This redirects requests for the Intranet to the Main page in the OrchestraCMS package much as we did by assigning the Main page in the site details for our force.com site.
13. **Save**.
14. It is now necessary to create the Visualforce page that will call the class. In Salesforce Setup, expand **Develop**.
15. Click on **Visualforce Pages**.
16. Click **New**.
17. This can be any name or label supported by Salesforce. Assign the Label and Name as **IntranetRedirect**.
18. Copy the code from the IntranetPage.txt file from the User Code Samples.zip and replace the code displayed in Salesforce with what you copied.
19. Click **Save**.
20. Now we want to create the tab users will use to access the Intranet we will create. In Salesforce Setup, expand **Create** and click on **Tabs**.
21. Click **New** in the **Visualforce Tabs** section.
22. From the Visualforce Page drop down, select the **IntranetRedirect** page you just made.
23. For the **Tab Label** and **Tab Name fields**, you can enter any value. Whatever you enter here will be what is displayed to the users. For these exercises, please enter the value **Intranet**.
24. Pick any tab style and click **Next**.
25. On the next screen you would select the Salesforce profiles that the Intranet would be available to. For these exercises, please leave it as **Default On** for all profiles and click **Next**.
26. In the next screen you would select which Salesforce Apps this tab will be available from. For these exercises, we are going to assign it to a specific App that we have not yet created, so we will uncheck the **Include Tab** box at the top, which should uncheck all the options in the list.
27. Click **Save**.
28. Now we need to create the Salesforce App to host our new Tab. In Salesforce Setup, expand **Create** and click on **Apps**.
29. Click **New** in the Apps section.

30. Set the App Label and App Name as **Intranet**. Again, this is just a label and could be anything you want, but will be exposed to users. Click **Next**.
31. We are going to leave the default logo. Our users will never actually see it, since they will be redirected into the site managed by OrchestraCMS.
32. Click **Next**.
33. The **Selected Tabs** column needs to contain your Intranet tab and the Home tab. Set the Default Landing Tab to your Intranet Tab and click **Next**.
34. You can pick and choose **Profiles** if it is only going to be available to specific users. For these exercises, please select the **Visible** checkbox at the top of the column to make this App available to all Salesforce user profiles.
35. Click **Save**.

You should now have an option in the Salesforce App menu called Intranet. It will not currently go anywhere because no pages have been added to the site in OrchestraCMS.

At this point you have an Intranet just waiting to have pages and content added in OrchestraCMS.

Configuring a Salesforce Community for use with OrchestraCMS

A Salesforce community combines the features of an Intranet and a force.com site. It can be accessed from inside Salesforce and also from an externally facing force.com site.

1. In Salesforce Setup do a **Quick Find** for **All Communities**.
2. Click **New Community**.
3. Choose the **Salesforce Tabs + Visualforce** template. We will use this option because the templates for community design will be provided by OrchestraCMS.
4. Click **Get Started**.
5. Enter **OCMSCommunity** as the Community name. This can be any label that meets Salesforce's criteria, but we will use OCMSCommunity for the name for these exercises.
6. Click **Create**.
7. Once completed click **Community Workspaces** at the top left and select **Salesforce Setup** from the drop down.
8. In Salesforce Setup, expand **Develop**.
9. Select **Sites**.
10. Click the **OCMSCommunity** Site Label link. This site was created automatically when you created the Community in Salesforce.
11. Click **Edit** in the Site Detail section.
12. Enter the following details for the Site Edit dialog:

- Active Site Home Page : Main

Note

The page Main is provided as the incoming point to handle page requests for sites managed by OrchestraCMS.

- Inactive Site Home Page : ErrorMaintenance
- Self Registration Page : *Clear this field*
- Change Password Page : ChangePassword

Note

Make sure to select the one from the cms namespace using the search icon. Otherwise you may end up using the default Salesforce ChangePassword.

- Site Template : *Clear this field*
- Site Robots.txt : OrchestraCMSRobots

Note

This sets the Visualforce page OrchestraCMSRobots as the robots.txt file for the site. You can use a custom page if you want different rules. The

	OrchestraCMSRobots file provides rules for indexing the whole site to search engines.
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- Site Favorite Icon : *Leave blank*
- Analytics Tracking Code : *Used for Google Analytics. Leave Blank.*
- URL Rewriter Class : *OrchestraCMSRewriter*

Note	The OrchestraCMSRewriter handles converting the default URL format of <code>http://domain.com/cms__Main?sname=OCMSCommunity&name=HomePage</code> to <code>http://domain.com/HomePage</code> .
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- Clickjack Protection Level : *Allow framing by same origin only*
- Require Secure Connection : *Unselected*

13. Click **Save**.

14. On the Site Details screen scroll down to the Error Pages section. Click the **Page Assignment** button. For each of the error pages listed in order to have OrchestraCMS show your branded error pages you need to set the associated page to as indicated in the list below and then click the **Save** button.

- Authorization Required Page : *ErrorAuthorizationRequired*
- Limit Exceeded Page : *ErrorLimitExceeded*
- Maintenance Page : *ErrorMaintenance*
- Page Not Found Page : *ErrorFileNotFound*
- Generic Error Page : *ErrorGeneric*

Note	The Service Not Available error page cannot be served by OrchestraCMS as it is served up when Salesforce is in a maintenance window. You must create a Static Resource in Salesforce to provide this page. Salesforce provides instructions for this.
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15. In Salesforce Setup search for and select **All Communities**.

16. Click the **Workspaces** link beside the OCMSCommunity.

17. Click **Administration**.

18. Select the **Login & Registration** option.

19. The Login Page and Change Password Page fields should be filled in with the values shown. The Allow internal users to log in directly to the community field is selected if your Salesforce users need to be able to log into the community.

The screenshot shows the 'Login' section of the Salesforce Community Setup page. It includes a 'Choose a login page' section with a 'Page' dropdown set to 'Visualforce Page' and a 'Main' button. Below this is a checkbox 'Allow internal users to log in directly to the community' which is checked. The 'Select which login options to display' section has a checkbox 'Stantive Technologies username and password' which is also checked. A link 'To configure more login options, go to Single Sign-On Settings or Auth. Providers.' is provided. The 'Logout' section has a 'URL' field. The 'Password' section has a 'Choose the default or a custom password management page:' section with two rows: 'Forgot Password' and 'Change Password', both with 'Visualforce Page' selected in the dropdown and 'ChangePassword' in the text field.

Login

Choose a login page.

Page Visualforce Page Main

☒ Allow internal users to log in directly to the community

Select which login options to display

☒ Stantive Technologies username and password

To configure more login options, go to [Single Sign-On Settings](#) or [Auth. Providers.](#)

Logout

Enter a URL for your logout page.

URL

Password

Choose the default or a custom password management page:

Forgot Password Visualforce Page ChangePassword

Change Password Visualforce Page ChangePassword

20. Make sure you searched for and selected the ChangePassword page in the cms namespace.
21. Click **Save**.

Note	You can also fill in the Logout -> URL field with the full URL of where you want users to be taken should they log out of the community website.
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22. Click **Preferences**.
23. Select the **Use custom Visualforce error pages**.
24. Click **Save**.

If this is not selected then users will get the default Salesforce error pages when an error condition is encountered, instead of your branded error pages.

The community is now configured for access by users in either of those two profiles. The community also needs to be activated.

1. Click **Pages**.
2. Set the Community Home to **Visualforce Page**.
3. Set the field to **Main**.
4. Click **Save**.
5. Click **Settings**.
6. Click **Activate Community**.
7. Click **Salesforce Setup** from the user drop down in the top right of the Communities screen.
8. Choose **OrchestraCMS** from the Salesforce App menu.
9. Choose **Create New Site** from the globe icon in the top right corner of OrchestraCMS.
10. Communities function as force.com sites with regard to OrchestraCMS, so click the **Salesforce Site** link.
11. Choose the **OCMSCommunity** from the Site Label.
12. Set the Default Language to **English**.
13. Set the Label to **English**.
14. Click **Install**.

The community site is now configured for use with OrchestraCMS.

OrchestraCMS Licensing

OrchestraCMS and OrchestraCMS Extensions are by default installed as a thirty day trial. When a license expires, the sites managed by OrchestraCMS will continue to function as sites, but the feature will no longer be enabled in OrchestraCMS, or access to OrchestraCMS will no longer be available, and you will be presented with a dialog to provide updated license keys.

When license keys are provided by Stantive, you can add them to OrchestraCMS in Setup under Licenses. The license keys are entered into the License Key and Secret Key fields in OrchestraCMS and the Check Now button can be pressed. This will cause OrchestraCMS to verify the licenses against <https://stantive.secure.force.com>. This means if that site was not added to your Remote Site Settings in Salesforce, your licenses will not activate.

Once the verification is made, OrchestraCMS will activate the features assigned to your org. These keys can be used in any Salesforce organization assigned to your company. In order for the licenses to activate, they must be associated with the organization in Stantive's records. This means if you need to add the licenses to a Salesforce organization (for instance a new Sandbox or Developer Org) you must first provide the Organization ID value from Salesforce Setup -> Company Profile -> Company Information -> Salesforce.com Organization ID to Stative support via customer-support@stantive.com.

Note

Please send the Salesforce Org ID to customer-support@stantive.com and mention it is a Stantive Training Org or have your instructor provision your licenses before continuing.

OrchestraCMS licences fall into two categories, Feature Licenses and User Licenses. Feature Licenses determine some of the additional functionality available within your OrchestraCMS instance. The current feature licenses are:

- **OrchestraCMS Email Distribution** – Enables users to subscribe to categories defined in Taxonomies within OrchestraCMS. OrchestraCMS can then be used to send HTML email notifications and publications to users based on the subscribed categories.relevant
- **OrchestraCMS AmazonS3 Library** – Provides the ability to configure an OrchestraCMS media library to be connected to and hosted on AmazonS3. An AmazonS3 account is separately required for this feature and does not come with OrchestraCMS.
- **OrchestraCMS Google Cloud Storage Library** – Provides the ability to configure an OrchestraCMS media library to be connected to and hosted on Google Cloud Storage. A Google Cloud Storage account is separately required for this feature and does not come with OrchestraCMS.

- **OrchestraCMS Private Sharing** – Allows OrchestraCMS to take advantage of Salesforce record sharing giving the ability to restrict access to pages and content based on Salesforce credentials.
- **OrchestraCMS Targeting** – Enables OrchestraCMS to filter content shown on to authenticated visitors to a site on a page based on field matching on their user record. For example filtering on the Department field of the user record in Salesforce in such a way that one menu is shown to users who have their department set to Information Technology and a different menu is shown to users who have their department field set to Marketing.
- **OrchestraCMS Multilingual** – Enables OrchestraCMS users to author content in multiple languages and serve up pages in multiple languages.
- **OrchestraCMS Extensions** – OrchestraCMS extensions provide additional separately licensed content templates that can be used to generate content types not available with a default installation of OrchestraCMS. The following is the list of Content Types that can be licensed with an installation of OrchestraCMS Extensions.
 - Salesforce Chatter
 - RSS Feed
 - Taxonomy Filtered Content Search
 - Languages
 - Dashboard
 - Salesforce Content
 - Salesforce Files
 - Slider
 - Google Custom Search
 - List View
 - Article
 - Salesforce Ideas
 - User Story
 - Bookmarks

User Licenses determine the maximum permissions that can assigned to a user within OrchestraCMS.

- **OrchestraCMS System Administrator** – Cannot be assigned to users. It is assigned automatically to the user who created the site within OrchestraCMS.
- **OrchestraCMS Site Administrator** – Can be assigned to users. Allows all available OrchestraCMS permissions to be assigned to an user.
- **OrchestraCMS Editor** – Allows users to create, edit and publish Content, Media and Pages.
- **OrchestraCMS Author** – Allows users to create, edit and publish Content and Media.
- **OrchestraCMS Publisher** – Allows users to publish Content and Pages.

- **External User Preview** – Allows Salesforce Portal User accounts to preview pages as read only.

In OrchestraCMS you can view the licenses used and available In Setup under Licenses.

1. Click the gear icon in the top right of OrchestraCMS to access setup.
2. Click **Licenses** from the list of options on the left.
3. Note the Status as **Active** for your licenses and the expiry date 30 days post-install.
4. Click the **License Detail** link beside OrchestraCMS Extensions to see the list of content types that can be activated.
5. Click the **Content Templates** link on the left and note that the first content template available is Available Subscriptions.
6. Click the **Licenses** link on the left.
7. Click the **License Detail** link beside OrchestraCMS Extensions.
8. Click the **Install** link to the right of the Article content type. Note that the Status Column now switches to Active.
9. Click the **Content Templates** link to the left. Note that the first four content templates are now from the newly activated Article element of OrchestraCMS Extensions. These have just been made available to users to use when creating new content.
10. Click the **Licenses** link to the left.
11. Click the **License Detail** link beside OrchestraCMS Extensions.
12. Click the **Install All** button at the top right of the list. Note all of the licenses are made active. If a license expires, content using that template will continue to display on the website; but users will be unable to use that content template to make any more of that type of content until the license is renewed.
13. Using the license keys provided below, copy the License Key value to the License Key field.
14. Click the Show link in the Secret Key field and copy in the License Secret Key value.
 - **License Key:** G+7HT7xC8uF3vmEkxiLEFA==
 - **License Secret Key:** 6/Bw1gtaum4LPMt4mfE79RV5BqakHJD0ZO6VoU4bj04=
15. Click **Save**.
16. Click **Check Now**. The licenses will be updated to those assigned to the organization ID you sent in. In order for this to work you must have registered your Salesforce Org ID with Stantive.

Provisioning User's Access to OrchestraCMS

OrchestraCMS makes use of OrchestraCMS generated Salesforce permission sets to grant access to Salesforce users who need to use the OrchestraCMS application. Once OrchestraCMS is installed a permission set called **OrchestraCMS** is created.

This permission set will be assigned to all users who are provisioned access to the OrchestraCMS application. It needs to be edited after installation by a Salesforce administrator to have the OrchestraCMS tab made available within the permission set.

1. In Salesforce Setup, expand **Manage Users**.
2. Click **Permission Sets**.
3. Click the **OrchestraCMS** permission set.
4. Click on **Object Settings**.
5. Click **OrchestraCMS** in the list of objects.
6. Click **Edit**.
7. Select the **Visible** and **Available** checkboxes.
8. Click **Save**.

OrchestraCMS will assign this permission set along with other configured permission sets to users who are assigned to profiles within OrchestraCMS. This is discussed later in this chapter.

OrchestraCMS has a variety of Salesforce custom objects included in the managed package. These objects do not count against the Salesforce limits imposed on specific Salesforce license types. Any users who need to use either the OrchestraCMS application or a site hosted by OrchestraCMS will need access to certain of these objects and the fields contained within them.

You can view the custom objects belonging to OrchestraCMS in Salesforce Setup by navigating to Objects under Create in the Setup menu. Any object with OrchestraCMS listed in the Installed Package column would need to have access granted manually if you were not using the permission sets.

Any custom objects or fields would need to have a custom permission set created to provide the users access to them. For example OrchestraCMS Extensions objects will need to have a custom permission set created to provide access to them. If this is not done user would be unable to create or edit content templates associated with OrchestraCMS Extensions.

Extensions Objects (only present if OrchestraCMS Extensions is installed) Note: These objects do count against Salesforce object limits
User Story
Content Anchor
Bookmark

1. In Salesforce Setup, expand **Manage Users**.
2. Click **Permission Sets**.
3. Click **New**.
4. Assign the label **OrchestraCMS Extensions**.
5. The API Name field should auto populate.
6. Do not select a user license. This will enable this permission set to be applied to any Salesforce user regardless of license type.
7. Click **Save**.
8. Click **Object Settings**.
9. For the User Stories, Content Anchors and Bookmark objects repeat the following steps.
10. Click the name of the object.
11. Click **Edit**.
12. Assign Read, Create, Edit and Delete Object Permissions.
13. Assign Edit and Read Field Permissions for each field that you can.
14. Save.
15. Click the arrow to the right of Object Settings and choose **Visualforce Page Access**.
16. Click Edit.
17. Move all the pages starting with ocms_socfp. from the Available Visualforce Pages column to the Enabled Visualforce Pages Column.
18. Click **Save**.

For each site in OrchestraCMS that a user will need access to, an OrchestraCMS System or Site Administrator will need to define the roles that will control who can do what within OrchestraCMS. This is a critical step that should be well considered as it will affect the user experience within OrchestraCMS. The steps included are:

- Create an OrchestraCMS profile assigned to the appropriate license type
- Modify the permissions of the profile to reduce permission levels if necessary
- Add users who need that level of licensed access, to that OrchestraCMS profile

Note	The user who creates an OrchestraCMS site is automatically assigned to the OrchestraCMS System Administrator profile within that OrchestraCMS site. Any
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	other users who need to administer that site will need to be added to a new OrchestraCMS profile that is assigned the Site Administrators license.
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First we want to create a user in Salesforce that we can assign to a profile within OrchestraCMS. Before creating the new user you will want to note the Salesforce Org portion of the username on your account. For example the bolded section of the following user name: darren.smith@**5orchestracms.com** . You will want this portion for your new user name.

1. In Salesforce Setup, expand **Manage Users**.
2. Click **Users**.
3. Click **New User**.

Set the user properties as listed below and click Save	
First Name:	Sample
Last Name:	User
Email:	<i>your email address</i>
Username:	format the user name after the user name you were assigned for the training org. For example sample.user@5orchestracmstraining.com
Nickname:	SampleUser
User License:	Salesforce
Profile:	Standard Platform User

To create an OrchestraCMS profile

1. In OrchestraCMS click the gear icon in the top right to access **Setup**.
2. Click **Profiles** from the options on the left.
3. Click the **New Profile** button.
4. Enter **Editors** in the Name field.
5. Enter **Users can Create, Edit and Publish Pages and Content** in the description field.
6. Select **OrchestraCMS Editor** as the OrchestraCMS User License. This establishes the maximum permissions that can be assigned to users added to this OrchestraCMS profile. Note that once you choose the license type the permissions available for assignment appear below.

7. Try to click the Setup checkbox or any of the subitems of the Setup branch. Note that you cannot. The OrchestraCMS Editor license is limited to Managing Pages, Content and Libraries.
8. Try clicking the Manage Libraries box towards the bottom of the list. Note that you can de-select this box. Please re-select the box.

Note

The OrchestraCMS User License assigned to an OrchestraCMS profile establishes the maximum permissions that can be assigned to that profile. The permissions can be reduced but not added to. For example if you wanted a particular group of editors to be able to create, edit and publish just Articles you could deselect all the other types of content for that profile.

9. Click **Save**.
10. Your new OrchestraCMS profile is now listed in the list of available profiles for user assignment.
11. Click **Edit** beside your Editors profile.
12. You can now assign the permission sets that will be associated with users added to this OrchestraCMS profile. Click **Manage Permissions**.

OrchestraCMS automatically generates a permission set for each OrchestraCMS profile you create. The naming convention is `ocms_ProfileName_Sitename`. Using the Manage Permissions interface you can assign any Salesforce permission set to the users in an OrchestraCMS Profile. By default OrchestraCMS will automatically assign the **OrchestraCMS** permission set and the auto generated permission set associated with that profile. You can also add any custom permission sets. For example we defined the OrchestraCMS Extensions permission set in a previous step so that OrchestraCMS users would have access to Extensions provided Content Templates. In any solution where your users would need access to other Salesforce features, objects or fields not provided as part of OrchestraCMS you would need to create permissions sets. You can then have those same permissions sets assigned as part of this process.

13. Select the **OrchestraCMS Extensions** permission set we created earlier from the Available Permission Sets column.
14. Click **Add**.

The OrchestraCMS Extensions permission set should be moved to the Applied Permission Sets column. Now when a user is added to this OrchestraCMS profile that account will be assigned all of these permission sets.

15. Click **Done**.
16. Click **Manage Users**.
17. Click the **Add User** button.

18. A search box is provided to allow you to find any users who are in Salesforce but may not be listed. By default OrchestraCMS will only list 25 users. If you have more than that you will need to search for the user. Select the checkbox for the additional user you created earlier and click **Save**.
19. Click the **Done** button.

The selected user has now been provisioned to this newly created OrchestraCMS profile.Ex

We can verify this in Salesforce.

1. Choose **Back To Salesforce** from the user icon in the top right of OrchestraCMS.
2. In Salesforce Setup, expand **Manage Users**.
3. Click **Users**.
4. Click the username for the sample user we created.
5. Scroll down to the Permission Set Assignments section and you should see the three permission sets configured in OrchestraCMS.

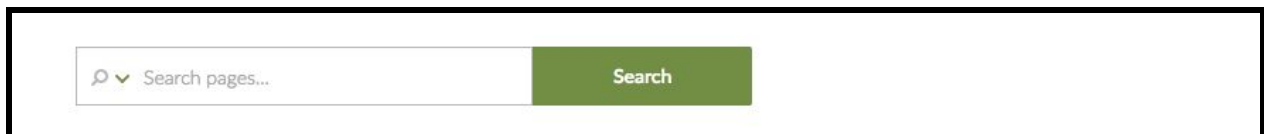
OrchestraCMS provides the following settings within an OrchestraCMS Profile.

Workspace: There are two options available, OrchestraCMS Workspace and Simplified Authoring Workspace. The Simplified Authoring Workspace removes a few of the buttons from the header at the top of the OrchestraCMS UI as illustrated in the screenshots below. If the use of these options proves confusing for your user base you can use the OrchestraCMS profile to remove them.

OrchestraCMS Workspace



Simplified Authoring Workspace



Disable Page Editor Panel Tooltips:

The current user interface no longer makes use of this option. Always leave this as Enable.

Open Page Behaviour:

When a page is opened for editing in OrchestraCMS there are two options that can be used. The first is Layout Mode which is the default and represents the screenshot above where users are given a panel layout view of the page and can add manage the content on the page as widgets. This mode is used in older versions of OrchestraCMS.

The second is Rendered Mode which provides a view of the page that looks more like the actual rendered page on the site. This provides the users context while editing the page so that they can select the content as it looks live on the site instead of using widgets that represent the content.

You can use these options in the profile to set the default mode to use when opening a page for editing. Users can switch the mode in their personal preferences.

Administrative Permissions:

Each of the permissions listed in this section controls the access to one of the Administrative options in the list on the left of the OrchestraCMS Setup interface. Disabling one of these checkboxes means that those users will not have that option displayed in their administrative menu. Only users who have been assigned an OrchestraCMS profile provisioned with the OrchestraCMS Site Administrators license can be assigned these permissions.

Page Permissions:

Pages in OrchestraCMS correlate to pages on your site. This section is used to grant OrchestraCMS users the ability to create, edit and publish pages in the site as well as editing and publishing the OrchestraCMS Site Map which is a logical organization of the pages. Access to specific pages that have already been created is controlled through the use of OrchestraCMS Private Sharing. The profile must be assigned either OrchestraCMS Site Administrator or OrchestraCMS Editor licenses to create, edit and publish pages. OrchestraCMS Publisher license can be used to provision a profile with permission to publish pages and the sitemap but not to edit or create.

Content Permissions:

Each content type can have create, edit, publish or translate permission individually assigned or removed. Users who have a profile containing create for a specific content type can create new content and view existing content of that type. Users who have a profile containing edit for a specific content type can view and edit existing content of that type. Users who have a profile containing publish for a specific content type can view and publish existing content of that type. Permission to specific content that has already been created is managed through the use of OrchestraCMS Private Sharing.

Library Permissions:

Media Libraries in OrchestraCMS are used to store content such as images, PDFs, videos and other collateral used on the website. The Library Permissions section can be used to control the ability of members in a user profile to view files in a library, upload new files to the library, edit existing files within the library, delete files from the library, expire files in the library and create folders within the library. Granular permission to individual files or folders within a media library is not currently available as a feature of OrchestraCMS.

Approval Process Permissions:

OrchestraCMS provides support for the use of Salesforce Approval Processes to control if users in an OrchestraCMS profile are able to publish pages and content. Even if a profile has been given the ability to publish pages or content, if an approval process is enabled in OrchestraCMS then the menu option to Publish in the content or page editor is replaced with an option labelled Send For Approval. If the OrchestraCMS profile has **Allow users with this profile to publish independently of the approval process** enabled, the users in that profile will have the Publish option instead of the Send For Approval. By default Site Administrators and System Administrators can publish without sending for approval.

Note

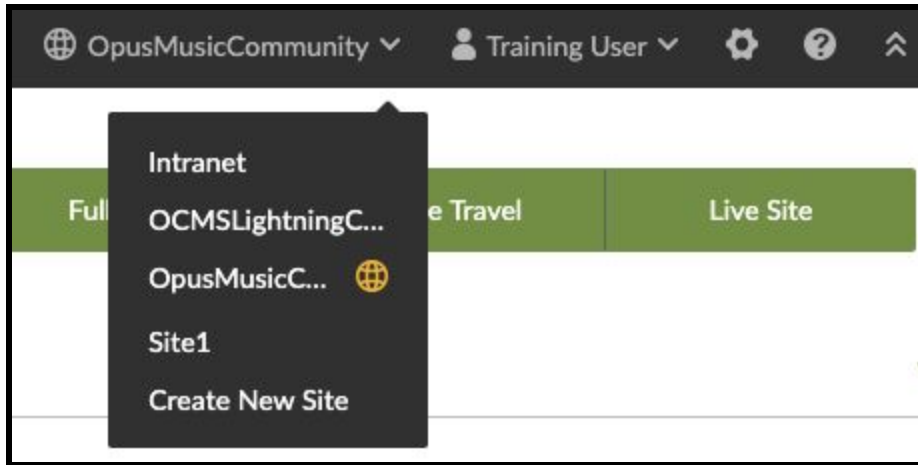
Stantive recommends ensuring you have a few users in a special profile that can publish outside the normal approval process as situations may arise where your approvers are not available and something needs to be published immediately.

Permissions for Site Visitors

For users that will need to access the site that is managed by OrchestraCMS there is an additional permission set provided. The ocms_SiteViewer permission set can be applied to any user in Salesforce that needs to be a visitor to a site hosted by OrchestraCMS. OrchestraCMS will automatically assign the permission set in Setup -> Site Details within OrchestraCMS to the guest user account used for anonymous user access. Any users who are authenticated in Salesforce will need to have the permission set assigned programmatically or manually via Salesforce as OrchestraCMS will not do this. Alternatively you can manually assign Read permission to the OrchestraCMS objects and fields using the Salesforce profiles of the site visitors if that is easier than assigning the ocms_SiteVisitors permission set. Keep in mind that any custom permissions required to objects, fields or files in Salesforce as part of your solution will not be covered by OrchestraCMS permission sets and you will need to construct permission sets to cover those objects for your site visitors if required.

Initial OrchestraCMS Configuration

You now should have three sites available within OrchestraCMS. You can switch between these sites using the globe icon shown below. Please complete the remaining exercises in the OCMSCommunity site.

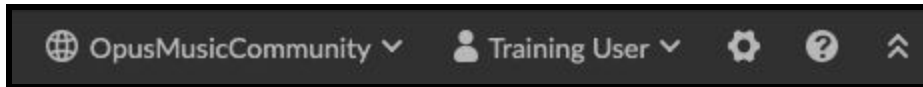


Once your sites have been setup to use OrchestraCMS, there is some initial configuration to be done within OrchestraCMS.

OrchestraCMS Scheduler

One of the key components of OrchestraCMS is the Scheduler. The scheduler is an OrchestraCMS component responsible for generating page and content cache files and handling distribution of email publications and notifications created in OrchestraCMS. This process is not specific to any site within OrchestraCMS and the configuration and management of this component can be done from within any site in OrchestraCMS. Similarly, any changes made to the scheduler in one site will be reflected in all sites in that Salesforce organization. This must be configured as it provides key functionality for OrchestraCMS.

Administration options in OrchestraCMS are accessed from the gear icon in the top right of the OrchestraCMS UI.



1. Click the gear icon.
2. Click the **Scheduler** option from the list on the left.
3. Click the **Start Scheduler** button. The Scheduler process is going to be launched and then run as your user account. The Status should change to Running.

The practical effect of having this process run as your account is

- If your Salesforce password changes, the scheduler will not function until you come to this screen and click the **Stop Scheduler** button, then click **Start Scheduler** and supply your new password. If your Salesforce org is set to expire passwords frequently, it may be worth setting up a service account without this limitation that can be used to start the scheduler, so you do not need to restart the scheduler every x number of days.
- If the account used to start the scheduler is disabled in Salesforce, this process will no longer run and a new user will have to come into this screen and Stop Scheduler and Start Scheduler in order to have the process run under their account.
- If Private Sharing is enabled in OrchestraCMS then pages and content will need to be shared with this account or the scheduler will not be able to generate cache files for items it cannot access. One workaround would be to assign the account View All Data and Modify All Data permissions to the OrchestraCMS custom objects in Salesforce.

Every time an item is published, an entry will be added to the OrchestraCMS Job Item object in Salesforce. Job Items are also created when emails are generated by the email distribution process in OrchestraCMS. The Scheduler attempts to process these Job Item records immediately. In the event it cannot, as outlined below then the scheduler process will scan the Job Item object in Salesforce once every hour and process the items found there. It then creates Apex batch jobs for processing the creation of the cache files or the sending of email. These jobs can be monitored in Salesforce Setup under Monitor -> Jobs -> Apex Jobs.

The scheduler has two limitations:

- If there are three batch Apex jobs already started by OrchestraCMS, the fourth job will not be started immediately and will wait for the next Scheduler run.
- Other Salesforce processes or applications can also run Apex batch jobs. Salesforce has a limit of five running jobs. If there are already five batch Apex jobs running in Salesforce, the next job will not be started until the next Scheduler run.

When a Job Item record has been processed by the Scheduler the status field of that record is set to Completed. The records are not removed. A maintenance task for administrators would be to periodically remove the Completed Status records from the Job Item object.

Site Details

In the OrchestraCMS Setup, the Site Details need to be configured. This will need to be done for each site added in OrchestraCMS. The screenshot below illustrates the options available.

Setup > Site details

Edit

Site name
OpusMusicCommunity

Site domain
ocmstrain.force.com

Site secure domain

Site prefix

Site URL
http://ocmstrain.force.com/

Site secure URL

Site guest user
OpusMusicCommunity Site Guest User

☐ Enable targets for Site Guest User

Package prefix
cms

Salesforce instance
na103

Model version
2

URL options

☐ Enable unique URLs

☐ Enable Case-sensitive URLs

Search engine options

☐ Enable Server Side Cache Injection (experimental)

Master Page preview

☒ ON Use unpublished Master Page when previewing a page.

The Site Name field is populated from the Site Name you specified when you added the site to OrchestraCMS. This field is not editable.

Note	Stantive recommends you do NOT change the site name in Salesforce once you have created the matching OrchestraCMS site.
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The Site Domain and Site Secure Domain fields contain the domain names that will be used to access your site via HTTP and HTTPS respectively. If you have a custom domain for your website, you will need to ensure the DNS setup has been done in Salesforce via the Salesforce process for custom domains and/or custom secure domains; then you can enter those custom URLs here in OrchestraCMS.

For our purposes, we will use the domain names we assigned the sites when we created them in Salesforce. The Site Domain field is automatically populated with the Salesforce domain of the site and only needs to be edited if we have a custom domain we are going to use with the site. The Site Secure Domain needs to be filled in initially for each site.

When a site visitor tries to access a page on the website that has had the “Force SSL” option enabled in its properties, OrchestraCMS serves up the page using the Site Secure Domain.

1. Click the **Edit** button on the Details screen.
2. Copy the Site Domain Field.
3. Paste the copied value into the Site Secure Domain field.

Note	The values of the Site Domain and Site Secure Domain may be different. For example if you have a customer domain name like <code>www.mydomain.com</code> but you have not enabled secure custom domains in Salesforce then your Site domain field would be <code>www.mydomain.com</code> , but your Site Secure Domain field would be <code>mydomain.secure.force.com</code> . Any HTTPS requests to your site would end up being redirected to <code>https://mydomain.secure.force.com</code> .
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4. The Site Prefix field is blank unless your site is a subsite of the main domain. For example if your domain is `www.mydomain.com` but your site is hosted at the URL `www.mydomain.com/mysite` then the Site Domain field would be `www.mydomain.com` and the Site Prefix field would have the value `mysite`. Our site in Salesforce does not have a prefix so we will leave this field blank.

5. The Site URL field is auto populated based on the value initially assigned to the site in Salesforce when you created the site in OrchestraCMS. This only needs to be changed if you are
 - Using a custom domain
 - Have made a Salesforce Sandbox
 - Your Salesforce org has undergone a split in Salesforce and you are assigned a new Salesforce Pod.
6. The Site Secure URL field should be the same as the Site URL field except it should start with https:// instead of http:// unless you are using a custom domain but have not signed up for secure custom domains in Salesforce as indicated above. Copy the value of the Site URL field and paste it into the Site Secure URL field. Change the http to https.
7. The Site Guest User field is used to assign permissions to anonymous visitors to your site, this encompasses any user who does not sign in. By default, when you create a force.com site, Salesforce creates a user account named *nameofsite* Site Guest User. This does not affect Intranets, since all users must be authenticated to Salesforce in order to access an Intranet. Click the **Change User** button and select the user account appropriate to the site you are editing. Click the **Select** button.
8. The Package Prefix, Salesforce Instance and Model Version fields are exposed for the use of Stantive support and are not editable.
9. If enabled, the Enable Unique URLs feature will change the behaviour of the URLs for the pages within your site. This feature is intended to address SEO concerns about pages being accessible via multiple URLs. By default, this feature is not enabled, and pages in the sitemap and unmapped pages folder are accessible by any URLs assigned in their properties. The location of a page within the sitemap tree has no effect on the URL that can be used to access that page.

If you enable the Enable Unique URLs option:

- Pages in the Unmapped Pages folder cannot be accessed by their default URLs and **MUST** have an additional URL assigned in their properties in order to be accessible from the site.
- Pages in the sitemap are accessible by their path within the sitemap and any additional URLs they have been assigned in their properties.

For example, if the Site URL is <http://www.mydomain.com>, using the screenshot below with Enable Unique URLs turned on:

- The page HomePage is assigned the URL / so can be reached by the URL <http://www.mydomain.com/>
- The page Catalog is accessible via the URL <http://www.mydomain.com/Catalog>
- The page Radios is accessible via the URL <http://www.mydomain.com/Catalog/Radios>



However, if you turn off the Enable Unique URLs feature:

- The page Home is accessible via the URL <http://www.mydomain.com> and <http://www.mydomain.com/Home>.
- The page Catalog is accessible via <http://www.mydomain.com/Catalog>
- The page Radios is accessible via <http://www.mydomain.com/Radios>

We are going to leave the Enable Unique URLs feature turned off.

10. The Enable Case-sensitive URLs option does **not** allow you to have a page with the URL www.mydomain.com/Radio and another page with the URL www.mydomain.com/radio. Instead it allows OrchestraCMS to serve only one case sensitive URL for a page and return a “404 page not found” message if the incorrect case is specified. For example, based on the screenshot above, if the Enable Case-sensitive URLs option is enabled, the page Radio is accessible via the URL <http://www.mydomain.com/Radios>; but if a user tries to access the URL <http://www.mydomain.com/radio> they will get a “404 page not found”. This feature was also included for SEO purposes for sites where it is felt returning the same page via different case of the lettering would be counted as two different URLs with the same page by a search engine. We are going to leave this option disabled.

11. The Enable Server Side Cache Injection should only be enabled at the recommendation of Stantive support. Please leave this option unselected and click the **Save** button to save the change we have made.

Note

When creating a Salesforce sandbox you will need to edit the Site Details so that the URLs and domains can be repointed from your production domain to appropriate values that coincide with the URLs for the sites in your sandbox.

Overture Tab

The first tab presented to users when they start an OrchestraCMS session is called the Overture tab. This tab provides the users a workspace from which they can

- View messages from the OrchestraCMS System Administrator
- Create new content and access content they have recently edited
- Create new pages and access pages they have recently edited
- Upload new media and locate media they have recently uploaded

As an Administrator you can access the Overture Tab configuration through the OrchestraCMS Setup and modify the default settings in addition to limiting the customization users can do on this tab. You can also rebrand the tab by changing the tab label and icon.

1. In OrchestraCMS Setup, click **Overture**.
2. In the **Name** field of the **General Settings** section, change the value to **Recent Items**.
3. Click **Save**.
4. Reload your browser window.

Hovering over the music note icon should now display the hover label **Recent Items**.

5. In OrchestraCMS **Setup**, click **Overture**.

Each OrchestraCMS Profile can have a different configuration for the Overture tab. For example, if you had an Authors profile that could not edit pages then there would be no point in having a Recent Pages panel on their Overture tab.

6. Pull down the **OrchestraCMS Profile** dropdown. You should see a list of the profiles you created previously. You can then configure the settings for the tab and clone the settings to another profile or each profile can have different settings.
7. Select the **Editors** profile you created.
8. Deselect the **Display in Overture** checkbox in the **Recent Pages List** section.
9. Click Save.

Users in the OCMS Editors profile will now not see a Recent Pages panel on their Overture tab. Additionally you can control

- The visibility of each panel
- The title of each panel
- The number of recent items to be displayed
- Whether the user can change any of the settings
- The data displayed about each column
- The Administrator message displayed
- A custom Help and Advice panel that can contain a published Text content created in OrchestraCMS.

The custom Help & Advice panel can be used to display a list of best practices, naming conventions, tag values or other custom instructions your users should have access to, to perform their daily tasks. Let's take a look at the process to add this custom panel.

The first step is to create a piece of content in OrchestraCMS that contains the custom text you want displayed.

1. Click **Create New Content** on the Overture tab (not in Setup).
2. Select **Text** as the Content Type and **Document Style 1** as the Content Template.
3. Assign a name to the content and click **Finish and Edit**.
4. Enter some text representing instructions for your users into the rich text editor.
5. Click the Save action.
6. Click the Publish action.

Now that the content has been created we can assign it to the Overture Tab.

1. Return to the Overture Tab option in OrchestraCMS Setup.
2. In the Help & Advice section deselect the **Display on Overture tab** for the **Text Area** and select the same option for the **Content Area**.
3. Click **Add** and select the content you just published.
4. Click **Save**.

Now you can view the Help & Advice by selecting the Help and Advice action from the Actions panel on the Overture tab.

Languages

If the Multilingual Sites license is assigned, OrchestraCMS supports translating a single page or piece of content in multiple languages. When a user creates a page or content item one of the initial steps is for the user to define what languages that page or content will be made available in. The list of languages available to the user for selection is defined by the OrchestraCMS Administrator in Setup under Languages. The list of languages available to the OrchestraCMS Administrator is based on the languages exposed as Displayed Languages by the Salesforce Administrator in Salesforce Setup, under Company Profile, in Language Settings.

Prior to the creation of any pages or content, the decision should be made by the design team about what languages the site should be available in. Languages can be added at any time, up to a limit of 20 per site. If languages are added after the site's pages are already created then existing pages and content would then need to have those languages and translations added as new versions of each page and piece of content.

Note

You cannot add languages to a new revision of a piece of content. You must create a new version of a piece of content to add languages.

The language used to present the site to a visitor is determined in the following order

- If the OrchestraCMS option to **Always use Salesforce User Language to determine language** is turned on, the Language setting from the Salesforce user record of any authenticated user will be used to determine the language to display. For unauthenticated users, this is ignored and the rest of this process is used.
- If the URL contains the parameter `ocmsLang=langcode`, this will set the displayed language. OrchestraCMS does not set this parameter. It only uses it. The parameter would need to be added by customized code from your design team. For example, if the URL were <http://www.stantive.com/contactus?ocmsLang=fr>, the page would be displayed in French.
- If there is no URL parameter, OrchestraCMS will look for a cookie called `apex__ocmsLang`. The value of the cookie will be the language code. OrchestraCMS does provide a Language Selector drop down that can be placed on a page to set the cookie. The Enable Language Cookie for this site, option should be enabled in Languages for the cookie to be set.
- If there is no cookie set, OrchestraCMS will query the Accept-Language header from the browser to get the list of browser configured languages.
- If no match can be found in the list of browser configured languages, the default language configured in OrchestraCMS is used to deliver the page and content.

To add a language to the site

1. In OrchestraCMS **Setup**, under **Languages**, the Default Language that was defined when the site was created will be listed.
2. Click **Add**.
3. From the Language Selection list, choose **French**.
4. Enter **French** in the Name field.
5. Set the Priority to **1**. The priority does not determine how languages are displayed to site visitors. It is used to determine the order the languages are displayed in all lists where languages are listed within OrchestraCMS.
6. Leave the Fall back to English as selected.
7. Click **Save**.

The Fall back option does not fall back to English. It falls back to the default language. The fall back option determines what happens when a page has more languages defined then a piece of content placed on a page. For example,

- A page is defined as available in English, French and Spanish
- A block of text content placed on the page is only defined in English and French.
- When a Spanish visitor looks at the page what do they see?
 - If Spanish is configured to fall back to the default language then the Spanish visitor sees the English text block.
 - If Spanish is not configured to fall back to the default language then the visitor sees an empty spot where the content would have been.

This is only configurable at the language level and not on the piece of content itself. This decision should be made in conjunction with the design team.

8. Click **Add**.
9. From the Language Selection list choose **Spanish**.
10. Enter **Spanish** in the Name field.
11. Set the Priority to **2**. The priority does not determine how languages are displayed to site visitors. It is used to determine the order the languages are displayed in all lists within OrchestraCMS.
12. Leave the Fall back to English as selected and click **Save**.

The OrchestraCMS application does not translate the pages and content automatically. Translations must be manually entered by your OrchestraCMS users. In order for a user to be able to translate a piece of content into a specific language, an OrchestraCMS Administrator must add them to the translation group for that language. If they are not added to the translation group for that language then they will be able to see the content in that language but not to edit it.

Note

A symptom that may be encountered is that a newly added user is unable to edit content. This is usually because the new user has not been added to any translation groups.

Translation groups are created automatically when you add a new language to OrchestraCMS. Users in the OrchestraCMS System Administrators profile can translate in any language without being added.

1. In OrchestraCMS Setup, select **Translation Groups**.
2. Click the **Edit** button beside English.
3. Add yourself and click **OK**.
4. Click the **Edit** button beside French.
5. Add yourself and the additional user you created.
6. Click **OK**.
7. Click the **Edit** button beside Spanish.
8. Add yourself and the additional user you created.
9. Click **OK**.

Based on this configuration you could edit any translation, but the additional user can only edit French and Spanish translations on pages and content.

Enabling Page Templates for OrchestraCMS

OrchestraCMS enables users to create pages and content for your site. Pages for your site are based on page templates created by OrchestraCMS developers in Salesforce. These page templates provide the structure and layout of a page. In order for OrchestraCMS users to be able to select a template when creating a page the page template must be added to the OrchestraCMS site by an administrator. Page templates can be reused between different OrchestraCMS sites or different for each site.

1. Click the **Create New Page** action in the Overture icon.
2. The Select Page Template section is blank. In order for a page template to appear here they must first be installed to OrchestraCMS. Click **Cancel** to close the dialog.
3. Click the gear icon in the top right of OrchestraCMS to access Setup.
4. Click the **Page Templates** link from the list on the left.
5. The items shown in the Auto Discovered Pages list are Salesforce Visualforce pages that have been configured for use with OrchestraCMS. How to add custom developed page templates to the Auto Discovered Pages list is covered in the OrchestraCMS Developer Training package. The page templates displayed by default are packaged with the OrchestraCMS and OrchestraCMS Extensions installations as samples.
6. Click the **Install** link next to the **EverreadyForm** template.
7. When installing a page template, you are presented with some options that should be discussed with the team who will be developing your custom page templates.
 - **Label:** This is the name that will be shown to users when they select the page template when creating a page. It should be short and descriptive of the function of the layout. For example ProductPages, ProfilePages, Level1LandingPages...
 - **Description:** This field is not exposed to users but should be used to contain information about the purpose of the page template that would be relevant to OrchestraCMS Administrators. For example Template used for pages with forms or Template used for loading dynamic content.
 - **Doc Type:** Used to define a custom HTML Doc Type tag to be inserted into pages based on that template. Do not fill in this field without recommendations from your development team. A sample value would be **html-5.0**.
 - **Page Caching Enabled:** If this is enabled then any page based off this template will have the markup prerendered by OrchestraCMS and stored as an OrchestraCMS cache. This typically improves the performance for serving up pages based on that template. It should only be disabled upon request from your development team who may need it turned off for use with dynamic content.
 - **Disable OrchestraCMS Scripts:** This is deselected by default and should only be enabled at the request of your development team as it will require that the

scripts you are disabling be manually included from the code of the Visualforce page this template represents.

- **Custom HTML Tag:** This allows a custom HTML tag to be specified for use in the page markup. A sample value might be **<HTML custom="parameterValue">**
- **Custom Body Tag:** This allows a custom Body tag to be specified for use in the page markup. A sample value might be **<BODY custom="parameterValue">**

These options can be edited at any later point by clicking the **Edit** link next to an Installed Page Template.

8. Fill in the Label field with **EverreadyForm** and click **Install**.
9. Click on the **Manage Site** tab in OrchestraCMS.
10. Click the **Pages** icon if it is not already selected.
11. Click **Create New Page** from the list of Actions.
12. You should now have the EverreadyForm page template to choose from. If it is not already selected click on it to select it.
13. Name the page Sample and click **Finish**. The page has now been created using the page template selected. We will look at the page creation process in detail during the OrchestraCMS User Fundamentals course.
14. Click on the **Setup** tab in OrchestraCMS. If you closed the tab then click the gear icon to reopen it.
15. Click the **Page Templates** link from the list on the left.
16. Click the **Install** link next to the **Everready** page template.
17. Leave the defaults as selected and click **Install**.
18. Click the **Page Templates** link from the list on the left.
19. Click the **Install** link next to the **EverreadyThreeColumn** page template.
20. Leave the defaults as selected and click **Install**.
21. Click the **Page Templates** link from the list on the left.
22. Click the **Install** link next to the **HarmonyFullWidth** page template.
23. Leave the defaults as selected and click **Install**.

You now have four page templates to select from when creating pages: HarmonyFullWidth, Everready, EverreadyThreeColumn and EverreadyForm.

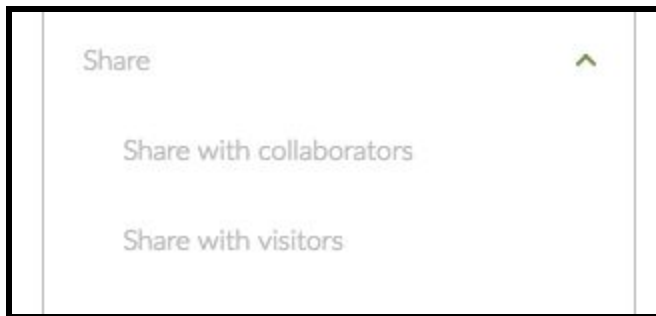
Note

A page template cannot be Uninstalled if it is in use by any existing pages. Those pages would first need to be assigned a new page template.

Access Control in OrchestraCMS

The ability to create or edit a specific type of content is controlled by the OrchestraCMS profile assigned to a user. Once created users will, by default have access to edit all types of content that their OrchestraCMS profile allows them to edit. To control access to specific pieces of content or pages you need to have the OrchestraCMS Private Sharing license enabled in your site. With that license you can configure OrchestraCMS to restrict access to individual pages and pieces of content. This is not a mandatory step but is something you can choose to enable if you want to be able to secure content or pages to specific teams within your implementation.

1. Open the **Sample** page from the Pages icon to open the page in the Page Editor.
2. The Actions panel should look like the screenshot below. The Share options are greyed out and unavailable.



3. From the User icon in the top right choose **Back to Salesforce**. This should open Salesforce in a new browser tab or window.
4. In Salesforce navigate to **Setup -> Security Controls -> Sharing Settings**.
5. Click the **Edit** button.
6. Locate each of the objects listed below and set the Default Internal Access to Private.
 - **Access Level Rule**: Required if enabling security in OrchestraCMS.
 - **Content**: Only used if you want to be able to restrict access to content items. If this is enabled then for every piece of content created the user who created it would have to share it with any other users that needed to be able to edit it as "Collaborators". It would also need to be shared with any visitors who should be able to see it on the site as "Visitors".
 - **Content Layout Instance**: Only used if you want to further granulate access to specific templates for specific content. For example you could grant access to a piece of Text content but only the Document Style 1 content template and not to the Text Block template of the same content. A sample use case might be where a user should be able to see the headlines for all articles but when they click through the headline to view the article they cannot see it because they have not been granted access.

- **License Profile Sharing Restriction:** Only used if you want to control which users a specific OrchestraCMS profile can share content and pages with. Setting this to Private will add a Sharing Permissions section to each OrchestraCMS Profile. A sample use case would be where you have a group who creates and edits regional content and they should only be able to share with other users in their regional editing group.

Sharing Permissions

Use this section to restrict which collaborators or visitors users in this profile can share pages and content. Leave blank to allow unrestricted sharing.

Add Collaborators

Action

Type

Name

Add Visitors

Action

Type

Name

- **Page:** Used if you want to be able to restrict access to pages.

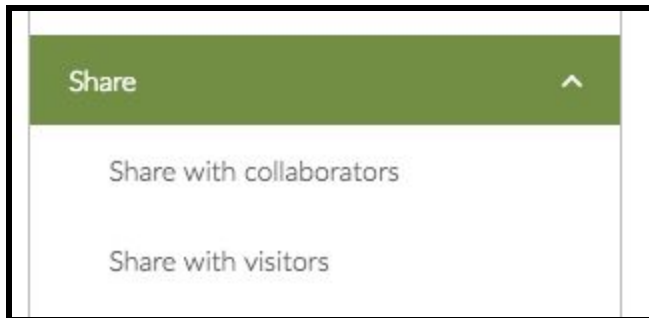
Note	These can be enabled at any time. If at any point you disable these sharing settings or modify them, any sharing you have already done within OrchestraCMS will be lost.
------	--

7. After setting each of the five objects to Private, click the **Save** button.

Note	If you enable sharing it affects all sites in OrchestraCMS and is not site specific. You can configure sharing rules in Salesforce to automatically share pages or content with certain users based on criteria, for example the Site Name field on the records.
------	--

8. You will receive an email from Salesforce when the sharing on these objects has been calculated by Salesforce. How long the process takes depends on how many records need to be processed by Salesforce. Please do not continue the steps until you have received this email.
9. Once the email is received return to your OrchestraCMS browser tab or window.
10. Click the gear icon in the top right.
11. Click the **Access Levels** link from the options listed on the left.
12. Click the **Activate** button.
13. Click the **Pages** tab on the Manage Site master tab.

14. Open your test page for editing. You should now see the Share option enabled in the Actions list for the page.



15. On the **Setup** tab in OrchestraCMS click the **Profiles** item from the list on the left.
16. Click the **Edit** link next to your Editors profile.
17. Scroll down and you will now see a new Sharing Permissions section. An OrchestraCMS Administrator can limit which users/groups members of this profile can share content and pages with by adding them in this section.

OrchestraCMS supports two types of sharing: visitors and collaborators.

- **Visitors:** Adding a user or group to the Visitors sharing will share that page or content with visitors to the end site produced by OrchestraCMS.
- **Collaborators:** Adding a user or group to the Collaborators sharing controls that user's ability to access the page or content within OrchestraCMS. 0

If an item is not shared with anyone, it is only visible to the user who created it and any user who has View All Data and/or Modify All Data permissions in Salesforce. For example, if a user is defined in Salesforce as a member of the System Administrator profile, OrchestraCMS sharing restrictions would not apply to them either as collaborators or, in the case of an Intranet, as visitors.

Note

Sharing applies to content and pages separately. Sharing a page does not automatically share all the content on that page.

We want to add some public groups to Salesforce to allow the users to assign permissions to them within OrchestraCMS during the User course exercises.

1. In Salesforce Setup, expand Manage Users.
2. Select **Public Groups**.
3. Click the **New** button.
4. Set the Label to **Team Leads**.
5. Click **Save**.
6. Click the **New** button.
7. Set the Label to **Department Heads**.
8. Click **Save**.
9. Click the **New** button.
10. Set the Label to **Executive**
11. Click **Save**.

Configuring OrchestraCMS for Email Distribution

In addition to using pages for presentation of content in a website, OrchestraCMS also provides functionality that allows users to subscribe to categories of interest. Those categories can then be assigned to content and pages using an OrchestraCMS taxonomy. Those pages and content can then be distributed via HTML email to the users who have subscribed to the relevant categories.

There are two email scenarios enabled by OrchestraCMS.

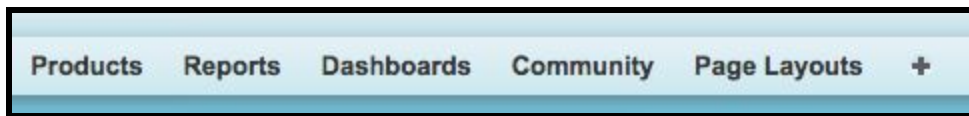
Publications allows users to pick a page in OrchestraCMS and send it at any time. The recipients are dynamically determined based on users who have subscribed to the topic(s) that that page is tagged with. An example of this might be a newsletter.

Notifications allows a generic page to be defined and emailed out automatically on a defined schedule. The content of the page is based on tagged content the users have subscribed to. Content added since the last scheduled mail out is then sent to the subscribed users on the next scheduled mail out. An example of this might be a weekly digest email containing the latest news headlines for the week.

To enable a page template to be used for email distribution in OrchestraCMS you must first make a modification to the Page Layout record for that template in Salesforce. Each Page Template has a corresponding Page Layout record in Salesforce. To view these records the Salesforce Administrator can expose the OrchestraCMS Page Layouts object via a tab in Salesforce.

1. From the User icon in the top right, choose **Back to Salesforce**. This should open Salesforce in a new browser tab or window.
2. In Salesforce **Setup**, expand **Create**.
3. Select **Tabs**.
4. In the **Custom Object** Tabs section, click the **New** button.
5. From the **Object** drop down, choose the **Page Layout** object.
6. Select any Tab Style and click **Next**.
7. You could now set the Salesforce profiles that the tab would be available to. We are going to leave them all as Default On.
8. Click **Next**.
9. You could then select specific Salesforce applications the Tab would be shown in. We are going to leave them all selected.
10. Click **Save**.

11. You should now have a Page Layouts tab in the Salesforce tab bar near the top of the Salesforce interface.
12. Click **Page Layouts**.



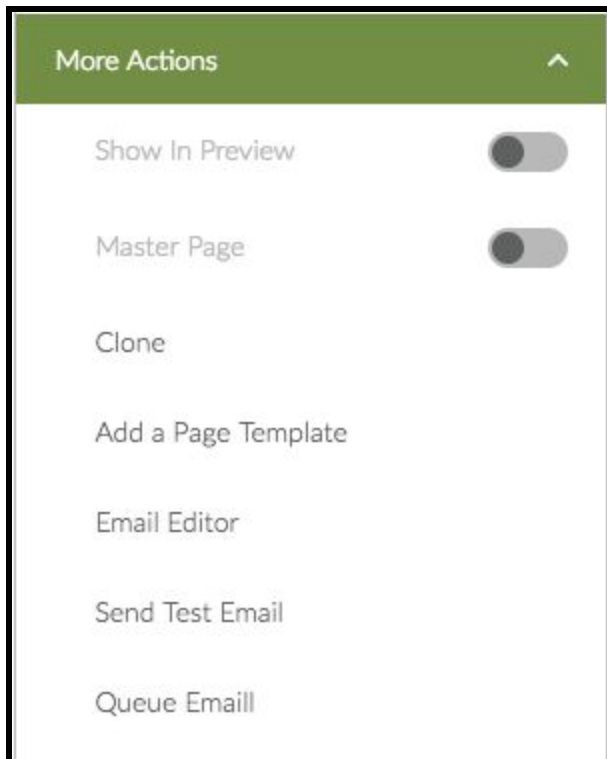
13. Click the **Go** button to view the complete list of Page Layouts.
14. You should see the EverreadyForm layout listed along with the others that have been installed to OrchestraCMS. As page templates are installed in OrchestraCMS, they will appear in this list. This list encompasses the page templates from all your OrchestraCMS sites. For example, if you added the EverreadyForm template to one of the other sites we created, you would see two EverreadyForm entries in this list. You can use the Site Name column to differentiate which template is related to which site. Click the **Edit** link next to the **EverreadyForm** page layout record.
15. You should see a Visualforce Email field. This field needs to be populated with the name of the Visualforce page you want to use for your email template. We will use the same template for our webpage as we would for our email template. Copy the value in the Visualforce View field and paste it into the Visualforce Email field.
16. Click **Save**.
17. In order for emails to be sent from OrchestraCMS, a “from” address for the email needs to be configured in Salesforce. In Salesforce Setup, expand **Email Administration** and select **Organization-Wide Addresses**.
18. There are no email addresses defined as “from” addresses by default in a clean Salesforce organization. In a production organization, you would need to determine ahead of time what email address(es) you would want your publications to come from.
19. Click **Add**.
20. Set the Display Name to your name.
21. Set the Email Address field to your email address.
22. You can also limit the profiles that can be used to send emails from this address. If you were going to limit it, you would need to include the Salesforce profiles of any user who was going to send emails as well as the Salesforce profile of the user account who was used to start the OrchestraCMS Scheduler. We are going to set this as **Allow All Profiles to Use this From Address**.
23. Click **Save**.
24. You also want to ensure that the Salesforce org is configured to allow email to be sent. To do this, in Salesforce Setup, expand **Email Administration** and select **Deliverability**. Ensure the Access level field is set to **All email**.
25. Click **Save**.

Note

When adding an email address as an Org Wide address Salesforce will send a verification email to that address. Unless the link in the verification email is

followed Salesforce will not send any emails from that address. Ensure you click the link in the email.

26. Go back to the OrchestraCMS browser tab or window.
27. Click the **Pages** icon on the Manage Sites master tab.
28. Open your Sample page for editing.
29. In the **Actions** panel click the **More Actions** option.
30. You should now see an option to **Send Test Email**. If the page is published, you will also see an option to **Queue Email** as shown in the screenshot below. This option enables OrchestraCMS users to send this page as an email to subscribed users.



31. In order for OrchestraCMS to compile and send the emails the OrchestraCMS Administrator must first establish schedules for the emails to be sent. Click the gear icon in the top right of OrchestraCMS.
32. Click **Scheduler** from the list of options on the left.

33. Click **New**.

There are two types of schedules that can be created:

- **Manual Mail-out** - These are used for publications. Publications are topical emails that are manually sent out by an OrchestraCMS user using the Queue Email function available on the Actions panel of a page. This would be configured for newsletters you wanted to manually send.
- **Automatic Mail-out** - These are used for automated notifications containing updated content. They are mailed to subscribed users on a predefined schedule. This would be used for the weekly digest example mentioned.

34. Set the name of the Schedule to **Publications**.

35. Leave the Type as **Manual Mail-out**.

36. Note that the **Email From Address** is populated from the list of addresses you configured in Salesforce. If you have more than one, you can use the drop down to select the email address to send your publications. You do not need to create more than one manual mail-out no matter how many different publications you might have. They will all use the same manual mail-out.

37. Click **Save**.

38. Since automatic mail-outs are automated, you will need to specify a page to be mailed when setting up the automatic mail schedule.

39. Click the **Pages** icon on the Manage Site master tab.

40. Click **Create New Page**.

41. Set the Name to **DailyDigest** and select all the available languages.

42. Set the Title to **Daily Digest**. The title will be used as the Subject line of the outgoing email.

43. Set the Description to **Page for use with new subscribed content notifications email**.

44. Select the **EverreadyForm** template if it is not already selected and click **Finish**.

45. Click the gear icon in the top right of OrchestraCMS.

46. Click **Scheduler** from the list of options on the left.

47. Click **New**.

48. Set the Name to **Morning Digest**.

49. Set the Type to **Automatic Mail-out**

50. Click in the Email Page field and choose the **DailyDigest** page.

51. Click **Select**.

52. The Recurs field allows you to set the intervals at which the emails containing the updated content will be generated. The Immediately option tries to send the notification email as soon as new content in the relevant category is published. We are going to choose **Daily**.

Note	<p>This is NOT when the emails will be sent. It is the time the process to compile the emails will be started. The scheduler must first compile all the matching subscriptions and users into distribution lists. Emails containing the relevant content are then created and assigned as attachments to the distribution lists. Once complete, the scheduler tries to create Apex jobs for sending the emails. If an error is encountered during the processing due to limits on the number of Apex jobs, an attempt will be made at each of the subsequent scheduler runs to create and process the Apex jobs until they are successfully sent.</p>
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53. Set the time to **09:00 a.m.** This is based on the Salesforce timezone of the Salesforce account used to create the Schedule item.
54. Select the **Every Weekday** option.
55. Click **Save**.
56. The schedule then needs to have the content type and content template set of the content that will be included in the emails associated with it. For example are you sending Article Summaries, Headlines, News Captions. This needs to be configured. Select the checkbox associated with **Morning Digest**.
57. Click **Edit Options**.
58. Select **Article** from the Content Type drop down.
59. Select **Article Summary** from the Content Template drop down.
60. Click **Add**.
61. Click **Close**.
62. To offer subscription choices to the end user, we will create one more automatic mail-out option. Click the **New** button.
63. Set the Name to **Evening Digest**.
64. Set the Type to **Automatic Mail-out**
65. Click in the Email Page field and choose the **DailyDigest** page.
66. Click the **Select** button.
67. Choose **Daily** for the Recurs field.
68. Set the time to **8:00 p.m.**
69. Select the **Every Weekday** option.
70. Click **Save**.
71. Tick the checkbox associated with **Evening Digest**.
72. Click **Edit Options**.
73. Select **Article** from the Content Type drop down.
74. Select **Article Summary** from the Content Template drop down.
75. Click **Add**.
76. Click **Close**.

At any point you can change the options in one of the existing schedules or delete it and the subscriptions users have to those items will no longer be valid and they will stop receiving those email notifications.

Configuring Targets

OrchestraCMS provides a license to activate a feature called targeting. Targeting provides the ability to control the visibility of content items on a page based on the values of chosen fields from a user's Salesforce record. This allows you to dynamically personalize pages on your site by filtering which content is displayed to a visitor based on these criteria.

OrchestraCMS allows you to select up to 20 fields from the Salesforce User object to filter on as shown in the image below.

User Edit
Darren Smith

User Edit [Save] [Cancel]

General Information

First Name: Darren
Last Name: Smith
Alias: DSmit
Email: darren.smith@stantive.c
Username: darren.smith@5orchestr
Nickname: darren.smith1.4794009f
Title: Trainer
Company: Stantive Technologies
Department: Executive
Division:

Setup > Targets > Select Targeting Fields

Before creating targets, you must select the target filter criteria fields. These are the fields that will be used for ad hoc targets. Only fields from the User object with data type Text, Picklist or Multi-Picklist can be selected. You can select one (1) field and a maximum of twenty (20).

Once saved you can add fields and omit fields. Omitted fields will not appear in new targets or when editing an existing target.

[Save and Close] [Cancel]

Field	Omit
1	<input type="checkbox"/>
2	<input type="checkbox"/>
3	<input type="checkbox"/>
4	<input type="checkbox"/>
5	<input type="checkbox"/>
6	<input type="checkbox"/>
7	<input type="checkbox"/>
8	<input type="checkbox"/>
9	<input type="checkbox"/>

- ✓ Default Notification Frequency when Joining Groups
- Chatter Email Highlights Frequency
- SAML Federation ID
- Portal Role Level
- Employee Number
- Language
- User Type
- Email Encoding
- Locale
- Time Zone
- Nickname
- Alias
- Stay-in-Touch Email Note
- Stay-in-Touch Email Signature
- Stay-in-Touch Email Subject
- Email Signature
- Email Sender Name
- Country
- Zip/Postal Code
- State/Province
- City
- Title
- Department
- Division

Note

Once these fields are selected they cannot be unselected. Since there are only twenty slots available and you cannot remove a field once it has been assigned to a slot you must carefully plan with your design team which fields you will use for filtering.

We are going to create some targets based on the Department field of the user record in Salesforce.

1. In Salesforce Setup, expand **Manage Users** and select **Users**.
2. Click the **Edit** link for your user account.
3. Enter the value **Executive** into the Department field. This is case sensitive, so please use the case as shown.
4. Click **Save**.
5. In OrchestraCMS Setup, select **Targets**.
6. Click the **Select Fields** button.
7. From the first drop down field, select the **Department** field.
8. From the second drop down, choose the **Country** field.

Note

The Omit checkbox is used when you no longer want a field to be available for users to select for creating or editing targets. Any targets already created that contain a field subsequently marked as Omit will retain the field until edited.

9. Click **Save and Close**.

Now that we have made the Department and Division fields available to targets, we need to create a target the user could apply. We could use varying combinations of values for department and country to control who could view which content. For example with the Country set to **Canada** and the Department set to **IT** only users in the Canadian IT department would be able to see the content. With the Country set to **United States, Canada, Mexico** and the Department set to **Marketing** only North American Marketing users would be able to see the content.

10. Click **Add Target**.
11. Assign the name **Executive** in the Name field.
12. Set the Description field to **Where department is Executive**. You can establish a date where the target can no longer be applied to pages and content. We will leave this field blank.
13. From the Field drop down, select **Department**.
14. Enter the Value as **Executive**. Keep in mind the value is case sensitive and must be in the same case it appears in the Department field of the User record in Salesforce in order to match.
15. Click **Save**.
16. Click **Clone** next to the Executive target.
17. Change the Name to **Team Leads**.
18. Change the Description to **where Department is Team Lead or Department Head**.

19. Change the Value to **Department Head, Team Lead**. The comma is used between values when there is more than one possible value that should match this target.

You could also use the + sign next to the values to add an additional filter to the target. For example if you added Country you could then set the value as Canada. When this is done both sets of values specified must be matched for the target to be valid and have the content displayed on the site.

The two targets created are predefined targets. Meaning you, the administrator, have set the values to be matched. The alternative is not to fill in a value to match and then save the target as an Ad Hoc target. An Ad Hoc target allows the OrchestraCMS user to specify the value to match at the time they apply the targets to the content or pages.

[illegible]

When users place that article on a page, they are prompted for a content template to use. The content template determines which markup is inserted into the resulting page. For example, if the user places the article on the page using the Article Summary, as shown:



Then the markup shown below is inserted into the HTML page.

```
<span>
  <script>
    LazyLoad.css('/resource/1425066724000/ocms_socfp__ocms_Article/css/styles.css');
    LazyLoad.js('/resource/1425066724000/ocms_socfp__ocms_Article/js/main.js');
  </script>
  <div id="a05i000000WJrPtAAL" class="media article article-summary">
    <div>
      <h2 class="media-heading article-title"><a class="article-link ocms-title-taxonomy-detail-link"
        data-content="a0Ci000000PA5GrEAL" href="">>Grocery Inc adding 5,000 in-store jobs in
        $1.2-billion expansion</a></h2>
      <p class="article-summary">Grocery Inc, Canada's largest grocer, said on Monday that it
        would open more than 50 stores and renovate more than 100 in 2015, creating 5,000 jobs</p>
    </div>
  </div>
</span>
```

However, if the user had placed the same content on the page using the Article Detail content template, as shown,



the markup inserted into the HTML page would be:

```
<span>
  <script>
    LazyLoad.css('/resource/1425066724000/ocms_socfp__ocms_Article/css/styles.css');
    LazyLoad.js('/resource/1425066724000/ocms_socfp__ocms_Article/js/main.js');
  </script>
  <div id="a05i000000WJrPuAAL" class="article article-detail">
    <div class="media article-detailMain clearfix">
      <div class="pull-left media-object article-image"></div>
      <div>
        <h2 class="media-heading article-title">Grocery Inc. adding 5,000 in-store
jobs in $1.2-billion expansion</h2>
        <div class="article-body">
          <p>Grocery Inc., Canada's largest grocer, said on Monday that it
would open more than 50 stores and renovate more than 100 in
2015, creating 5,000 in-store jobs.</p>

          <p>The company, which operates under various banners had
announced earlier that it would invest more than $1.2 billion in its
domestic business this year.</p>

          <p>The investment will also stimulate about 15,000 construction
and trade jobs, said the Mark Markson, Grocery Inc's vice
president of corporate affairs and communication.</p>

          <p>Toronto, Ont.,-based Grocery Inc. has about 192,000 full- and
part-time employees.</p>
        </div>
      </div>
    </div>
  </div>
</span>
```

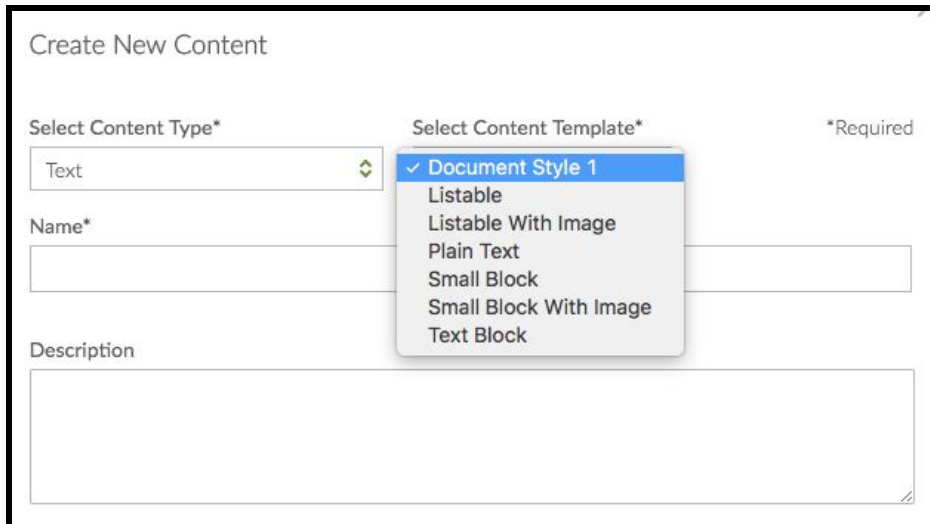
Content Templates can have a Connected Taxonomy assigned. Connected Taxonomies allow developers to read an additional attribute of the content called renderTagPath. Developers can then use this property to identify the taxonomy paths a content is tagged with, if required. This should only be enabled if required by your design team.

Content Types

Content Types are groupings of Content Templates. For example, there is a Text content type. The Text content type has seven associated content templates. Each has a different layout for displaying the text contained in the content.

- Document Style 1
- Listable
- Listable With Image
- Plain Text
- Small Block
- Small Block With Image
- Text Block

When users create a piece of content in OrchestraCMS, they are first prompted for a Content Type and then, based on the content type selected, they need to pick from one of the associated Content Templates to finish creating the content, as illustrated below.



OrchestraCMS provides for the fact that the layouts provided out of the box may not meet all needs. To this end, a Salesforce developer can create custom content templates to meet any requirements not covered by the out-of-the-box content templates that come with OrchestraCMS.

The process of creating custom content templates is covered in the OrchestraCMS Development Concepts course. When a custom content template is created, it will need to either be associated with an existing content type, or a new content type will need to be created to encompass it. Creating a new content type is covered in the OrchestraCMS Development Concepts course.

We will edit an existing content type and add a Content Template so it is available for users. For example in a social intranet we might want to allow users to comment on articles on a page. To do this, we would need to associate the Salesforce Chatter Content Feed content template with the Article content type.

1. In OrchestraCMS Setup, select **Content Types**.
2. In the Additional Content Types section, select the **Article** content type.

You will see four content templates already assigned to this content type. When a user creates a piece of content they are prompted to select a content template to use for the content. A piece of content can have multiple content templates associated with it. For example when creating an article you might use the Article Summary in a list of articles. When the user clicks the article summary the full content of that article needs to be loaded, that would be the Article Detail template of the same article content item. If the situation exists where you know that every time a particular type of content is created you want to have particular templates added to it you can mark those templates as **Auto Create** in the content type. You can only mark one of the content templates in a content type as the Default. This is the one that will be displayed when a user opens a piece of content with multiple content templates assigned to it.

Note

The Content has a parent/child structure box of a content type is only configured at the request of your development team. This option should not be enabled otherwise as they require coding within the custom content type.

3. Click the **Add Templates** button.
4. Choose the **Content Chatter Feed** template and click **OK**.
5. Select the **Auto Create** box next to the Salesforce Chatter Content Feed item in the list of Content Templates assigned to the Article Content Type.
6. Click **Save**.

OrchestraCMS provides users the ability to preview a page before the page is published so that a user can see how the page would look live before it is available publicly. Content can be previewed as well, but it needs context to be viewable. For example, I cannot preview an Article without having it on a page so that CSS and scripting from that page can be applied to the article. To prepare this, the administrator needs to assign preview pages for any content templates that a user would expect to be able to preview. The page assigned needs to have a

special content placeholder called a **Content View** put on it in the spot where the content would appear.

1. On the Manage Site tab click the **Pages** icon.
2. Click **Create New Page**.
3. Assign the page the name **FormPreview** and select all three defined languages.
4. Select the **EverreadyForm** page template and click **Finish and Edit** which should open the page in page editor mode.
5. In the three columns of panels, click in the top panel in the middle column and choose **Add New Content**.
6. From the Content Type drop down, choose **Utility**.
7. From the Content Template drop down choose **Content View**.
8. Set the Name as **FormPlaceholder** and select all three defined languages.
9. Set the Description as **Place holder for form content on the preview page**.
10. Click **Finish**. There are no options to configure in this content, so we do not need to Finish and Edit.
11. Click the **Page Specific Properties** option from the content item's menu as indicated below and set the Content Type and Content Template drop downs to **Form**.



12. Click the **Save** button.
13. Save and close the **FormPreview** page editor tab.
14. At this point we have created the page we will assign for previewing forms. We have added the placeholder Content View item on the page and configured it for loading forms. Now we can assign this page as the page to be used when users have created a form and want to see how it would look before putting it on a page.
15. In OrchestraCMS setup, select **Content Types**.
16. In the Core Types section, click the **Form** content type.
17. Click in the **Preview Page** field.
18. From the list, choose the **FormPreview** page.
19. Click the **Select** button.
20. Click **Save**.

At this point, if a user creates a form and clicks the preview button on the content, that form will open in a pop up window on the page you just created showing them what the form will look like in the context of that page.

Caching

OrchestraCMS can serve up cache files for pages and content on the site. Cache files are pre-rendered markup so the file does not need to be generated on the fly when requested. This means that it is possible the markup stored in the cache does not accurately reflect the updates to content made by users in OrchestraCMS. Users can generate new cache files for pages and content by using the Refresh Cache option of the Actions panel on the page/content editor of published pages and content.

In the event that all of the caches need to be refreshed – for example, a site-wide rebranding or changes to the underlying visualforce page template code, an OrchestraCMS administrator can also refresh all the page or content caches on the site. To refresh caches, follow these steps.

1. In OrchestraCMS Setup, click **Page**.
2. Select the **Email me when cache refresh has completed** check box.
3. Click the **Refresh Cache** button.

This will initiate a cache refresh for all pages. This will not include pages based off templates where the Page Caching Enabled box is not selected. Those pages do not have cache files and are rendered on the fly anyway, so changes should be immediate for those pages. It will also not include markup for content items which are not marked as IsPageCacheable (covered in Development Concepts course). The cache refresh creates entries in the OrchestraCMS Job Item object for each page to be refreshed. The OrchestraCMS scheduler then processes those job items as Apex Batch jobs in Salesforce.

Note

If the OrchestraCMS Scheduler is not running, the cache refresh will not complete.

The Apex Batch jobs may have hit limits in Salesforce of more than five currently running jobs. If this is the case the refresh needs to wait for available slots in the queue in order to process the refresh. The length of time the cache refresh takes depends on factors including

- Number of pages to be processed
- Complexity of the markup for the pages
- Available Apex Batch job slots in Salesforce

Selecting the box to be notified by email when the batch job is completed means you do not have to monitor the batch job in Salesforce to identify when it is complete, you will receive an email instead.

1. In OrchestraCMS Setup, under **Cache**, select **Content**.
2. In all cases you would likely need to refresh both the Level 1 and Level 2. There is no practical distinction unless otherwise recommended by your development team or by Stantive Technical Support. Select both of the **Email on Completion** boxes.
3. Click both of the **Refresh** buttons.

Content Cache refreshes regenerate the markup files attached to all currently published content items marked with `IsContentCacheable` on their Content Layout record (covered in the Development Concepts course). The process is the same as the page cache refresh process.

OrchestraCMS also supports the Salesforce Platform Cache feature. Salesforce Platform Cache enables session information and cached object data for better performance of your site and the OrchestraCMS application.

The installation of OrchestraCMS creates a platform cache partition called OrchestraCMS in Salesforce. You can allocate space to this partition in Salesforce Setup by selecting Platform Cache under the Develop option. There are two caches, session and org. OrchestraCMS only uses the session cache for user targeting information. If you are not using the Targeting feature of OrchestraCMS you do not need to allocate space to the session cache.

Once you have allocated space you must then enable which options you will cache in OrchestraCMS Setup under the Platform Cache option.

There are five options you can enable for caching.

Site Object:

This information is used by every OrchestraCMS transaction and live site request. It is recommended that this be enabled.

User Object and Targeting Filters:

This is used by the OrchestraCMS targeting feature. It is used only by the live site. If you are not using the targeting feature of OrchestraCMS you should not enable this one.

Site Language Maps:

This is used by multilingual sites during live site rendering. Even if you do not use the multilingual feature of OrchestraCMS you should enable this cache.

Page Version Index:

This is used by the live site. It is recommended this cache be enabled.

User Profile Permissions and Feature Licenses:

This is used by the OrchestraCMS application and not the live site. Every action taken by a user in OrchestraCMS must be verified to ensure they have permission. It is recommended this be enabled.

Customer Portal

OrchestraCMS supports authenticated web sites. This includes Salesforce portals and communities. Salesforce intranets do not require authentication pages in OrchestraCMS because users have to log into Salesforce first in order to access them.

OrchestraCMS does not perform the authentication for these sites. The authentication is handled by Salesforce. OrchestraCMS just allows you to create the branded pages to manage the login and user processes. We are currently working in the OCMSCommunity site, so we will setup branded authentication functions for this Community.

1. In OrchestraCMS Setup, select **Customer Community**.
2. Each of the pages used to manage the default user processes of logging in, changing their password and managing their settings need to be created here before they can be managed in the Manage Pages tab. Once they are created here, they can be found by default in the Pages icon. Click the **Create** link for the **Default Login Page**.

Setup > Customer Portal

Default Login Page

[Create](#) No Page Exists

Once you've created a Customer Portal from Customize > Customer Portal > Settings you must associate the customer portal with your Salesforce Site.

1. Go to Develop > Sites > Login Settings.
2. Select the customer portal from the Enable Login For picklist.

Change Password Page

[Create](#) No Page Exists

After associating the customer portal with your Salesforce Site as described above you can enable the Change Password page within OrchestraCMS, to be used in your portal.

1. Go to Develop > Sites > Login Settings.
2. Select the OrchestraCMS ChangePassword Page from the Change Password Page lookup.

Once these steps are complete launch the Create wizard using the link to the left.

My Profile Page

[Create](#) No Page Exists

After associating the customer portal with your Salesforce Site as described above you can enable the My Profile page within OrchestraCMS, to be used in your portal.

1. Go to Develop > Sites > Login Settings.
2. Select the OrchestraCMS MyProfile Page from the My Profile Page lookup.

Once these steps are complete launch the Create wizard using the link to the left.

3. The Create New Page Wizard will start. Set the name to **SiteLogin**. Any name can be assigned this is just the value we will use in the exercises.
4. Set the Title to **Login Page**.
5. Set the Description to **User Login Page for Authentication to Site**.
6. Select all three of the available languages.
7. Expand Advanced Properties and ensure **Force SSL** is checked. This must be enabled in order for the page to accept user credentials. It prevents the credentials from being submitted as clear text.

Note

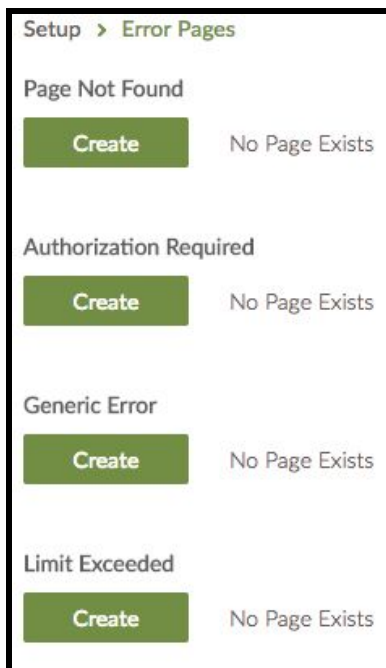
You cannot set Force Login on this page. Enabling Force Login in any page's properties causes a user to be redirected to the login page you are defining now if they try to access that page and are not already logged in. If you enabled Force Login on the login page then users will be unable to access it for logging in.

8. Select the **EverreadyForm** page template and click **Finish**.
9. The Default Login Page now exists and can be edited by OrchestraCMS users in the Pages icon. Click the **Create** link for the **Change Password Page**.
10. The Create New Page Wizard will start. Set the name to **ChangePassword**. Any name can be assigned this is just the value we will use in the exercises.
11. Set the Title to **Password Reset**.
12. Set the Description to **Password Reset Page** and select all three languages.
13. Expand Advanced Properties and ensure **Force SSL** is checked. This must be enabled in order for the page to function. It prevents the credentials from being submitted as clear text.
14. Select the **EverreadyForm** page template and click **Finish**.
15. The Change Password Page now exists and can be edited by OrchestraCMS users in the Pages icon. Click the **Create** link for the My Profile Page.
16. The Create New Page Wizard will start. Set the name to **MyProfile**. Any name can be assigned this is just the value we will use in the exercises.
17. Set the Title to **User Profile**.
18. Set the Description to **User Profile Page** and select all three languages.
19. Expand Advanced Properties and ensure **Force SSL** and **Force Login** are checked. Force Login is checked because users must be logged in to use this page.
20. Select the **EverreadyForm** page template and click **Finish**.
21. The My Profile Page now exists and can be edited by OrchestraCMS users in the Pages icon.
22. Select the **Pages** icon in OrchestraCMS on the Manage Site master tab.

You should now see the SiteLogin, ChangePassword and MyProfile pages listed. These pages would then be edited by your page editors to add the proper content to ensure they could perform their functions.

Error Pages

When the site was configured in Salesforce for use with OrchestraCMS, we defined cms error pages in the site details for Salesforce to serve up. Those selections were just redirectors, these pages also need to be created in OrchestraCMS. Error pages need to be defined for each site in OrchestraCMS and created by an Administrator in much in the same fashion we created the Customer Portal pages, after which they can be edited by your page editors from the Manage Pages tab. This process allows you to provide custom branded error pages for your site. If this is not done then any error condition will result in a Salesforce branded error page being served to your site visitors.



1. In OrchestraCMS Setup, select **Error Pages**.
2. Click the **Create** link next to Page Not Found.

Set the page properties as listed below and click Finish	
Name:	PageNotFound
Title:	404 - PageNotFound
Description:	Error page served up when a requested page cannot be found
Page Template:	EverreadyForm
Languages:	English, French, Spanish

3. Click the **Create** link next to Authorization Required.

4. Set the page properties as listed below and click Finish	
Name:	AuthReqd
Title:	401 - Authorization Required
Description:	Error page served up when credentials must be provided to access the resource
Page Template:	EverreadyForm
Languages:	English, French, Spanish

5. Click the **Create** link next to Generic Error.

6. Set the page properties as listed below and click Finish	
Name:	GenericError
Title:	GenericError
Description:	Error page
Page Template:	EverreadyForm
Languages:	English, French, Spanish

7. Click the **Create** link next to Limit Exceeded.

8. Set the page properties as listed below and click Finish:	
Name:	LimitExceeded
Title:	ServerError
Description:	Page presented when Salesforce org limits have been exceeded
Page Template:	EverreadyForm
Languages:	English, French, Spanish

On the Pages icon you should see the error pages you just created listed here. Your editors should now be able to configure these pages to be branded for your site. Once they are published, these branded pages will be served up by Salesforce for the appropriate errors when encountered by your site visitors.

Manage Libraries

OrchestraCMS provides media libraries for storing site collateral such as images for use on pages and files such as PDFs and other file types for download. By default when you create an OrchestraCMS site a media library is created and hosted on Salesforce. This does not create a Salesforce Library, it is an OrchestraCMS construct. There are three possible media library types for use with OrchestraCMS.

Salesforce

- Created by default when you create an OrchestraCMS site.
- Maximum size per file of 25MB.
- Counts against file storage limits in Salesforce.
- When a page that contains items from one of these libraries is viewed by an unauthenticated website visitor each of the items used counts as an additional page view towards your Salesforce Pageviews limit. For example one page with three images would count as four pageviews.
- Anyone with the URL of the file can download the file.
- Files stored in an OrchestraCMS Salesforce based media library are stored in Salesforce as record attachments. This means all the considerations for attachments in Salesforce will apply to these files.

Google Cloud

- Requires separate feature license within OrchestraCMS.
- Need to have a Google Cloud Storage account independant of OrchestraCMS.
- Collateral stored here does not count against Salesforce limits for File Storage or Page Views.
- Can provide secure links for files.

Amazon Cloud

- Requires separate feature license within OrchestraCMS.
- Need to have a Amazon Cloud Storage account independant of OrchestraCMS.
- Collateral stored here does not count against Salesforce limits for File Storage or Page Views.
- Can provide secure links for files.

You can control a user's ability to perform the following actions in each media library through the user's OrchestraCMS profile.

- View files in
- Upload files to
- Create folders in
- Edit files in
- Delete files from
- Expire files in

Media libraries can be shared between sites managed by OrchestraCMS. This allows you to store collateral in a single library and use it in multiple sites negating the need to duplicate the content for multiple sites. Once shared you cannot unshare a library. This is done to prevent orphaned content in other sites that may have used the shared library.

The screenshot shows the 'Edit Library' form within the OrchestraCMS interface. The breadcrumb navigation at the top reads 'Setup > Libraries > Edit Library'. The form contains the following fields and options:

- Repository ***: A dropdown menu with 'Salesforce' selected.
- Name ***: A text input field containing 'OCMSCommunity Media'.
- Description**: A text area with the placeholder 'OrchestraCMS Media library' and a note 'Maximum 255 characters'.
- Sharing**: A section with the text 'Share this library with the other Sites in your Salesforce.com organization? Once shared, it cannot be unshared.' and two radio buttons: 'Yes' (unselected) and 'No' (selected).
- Allow Uploads**: A checkbox that is checked.
- Publish on Upload**: A section with a radio button for 'Automatic' (selected).
- Buttons**: 'Save' and 'Cancel' buttons at the bottom.

The user interface in OrchestraCMS for each media library is the same so users will not be able to tell the difference between each of the types. If you have a business requirement for collateral to be hosted in a specific type of library you may want to name it in a fashion that represents the business case to users. For example Real Estate Images Library.

Setting up a Google or Amazon library requires an account with the appropriate provider.

To identify the steps for configuring an Amazon or Google library please consult the Manage Media Libraries User Guide available via the Stantive.com portal at <https://thepulse.stantive.com/Resources>.

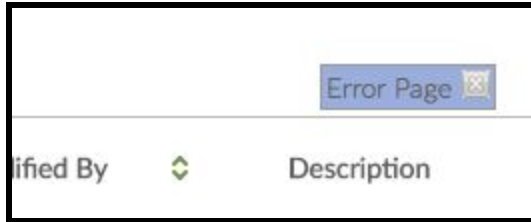
Since the user interface is the same for all library types users will be using a Salesforce library for the User Fundamentals exercises.

Note	Salesforce does not support streaming videos stored in Salesforce. For media streaming files consider hosting them on an Amazon based library.
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Best practices for media libraries involve carefully planning a naming convention for your files and folders to make it easier for your users to navigate. It is also recommended that you limit which OrchestraCMS profiles have access to making folders and deleting files as it is difficult to recover files from the media library if they are deleted.

OrchestraCMS tagging provides the ability for users to assign custom metadata to pages and content for the purpose of filtering content and page listings. This makes it much easier for your users to locate the pages and content they need to work on within the OrchestraCMS application. Tagging has no effect on the pages and content of a site for visitors. Personal Tags are visible only to the user that set them. Public Tags are visible to all users of OrchestraCMS.

1. In OrchestraCMS Setup, select **Tags**.
2. Enable **Personal Tags**.
3. Enable **Public Tags**.
4. Click **Save**.
5. Refresh your browser window to pick up on the change.
6. Select the **Pages** tab under the Manage Site tab.
7. Click the **Unmapped Pages** node. There should now be a tags column visible in the listing.
8. Click the **LimitExceeded** page to open it.
9. On the LimitExceeded edit page tab, expand the More Actions in the **Actions** panel and choose **Tags**.
10. In the **Public Tags** field enter the value **Error Page** and click **Save**.
11. Close the LimitExceeded edit page tab in OrchestraCMS.
12. Click the **AuthReqd** page to open it.
13. On the AuthReqd edit page tab, expand the More Actions in the **Actions** panel and choose **Tags**.
14. In the **Public Tags** field enter the value **Error Page** and click **Save**.
15. Close the AuthReqd edit page tab in OrchestraCMS.
16. Click the **PageNotFound** page to open it.
17. On the PageNotFound edit page tab click the **Actions** button and choose **Tags** from the drop down.
18. In the **Public Tags** field enter the value **Error Page** and click **Save**.
19. Close the PageNotFound edit page tab in OrchestraCMS.
20. Return to the **Pages** tab.
21. The Tags column should now display the Error Page tags you assigned. Click on one of the Error Pages Tags and the view will refresh to only show pages with that tag.
22. You can switch back to the unfiltered view by clicking the x on the filter shown in the screenshot below. Do that now.



As a best practice, similar to having an effective naming convention for pages and content, you should consider defining a tagging system users can use to effectively locate content and pages within the OrchestraCMS interface. Tags are freeform so there is no method available to the Administrator to enforce a predefined list of tags. The Overture tab provides an ideal place to list an approved list of tags that your users can use when tagging content and pages. This would allow them to consult a list of tags they should be using within your implementation as an internal best practice.

Approval Process

Many organizations have a need for governance processes around their website content. It is possible to enable a Salesforce approval process so that OrchestraCMS users cannot publish content or pages directly but must first have them approved by another OrchestraCMS user in order to be made live on the website. This is not a requirement of OrchestraCMS and only needs to be implemented if you want review control over what authors and editors will be publishing. This is accomplished by creating an Approval Process in Salesforce. OrchestraCMS does have some required steps. You can however modify the approval process(es) to match the governance logic required by your organization.

The recommended first step is to create a queue for the approvals to be held in until users have a chance to accept the approval. You do not have to use a queue if you have specific approvers however a queue provides the most flexibility in terms of responsibility assignment.

1. In Salesforce Setup, under **Manage Users**, select **Queues**.
2. Click **New**.
3. In the Label field, enter **OchestraCMSApprovers**.
4. Click in the Queue Name field and it should populate with the same value as the Label field.
5. Move the **Approval** object from the Available Objects column to the Selected Objects column.
6. Move your user account from the Available Members column to the Selected Members column. In a production org you would include any users that would need to approve items for publishing in OrchestraCMS. Then click **Save**.

Although approvals can be configured to send emails to queue members when a record is assigned to the queue it is recommended not to select this option but instead to save the sending of the email from the approval process itself.

Note

OrchestraCMS does not support users added to the queue via Public Group or Role. Any user added needs to be a licensed OrchestraCMS user as approving requires access to the pages/content in OrchestraCMS.

The second step is to create an email template that will be used to notify users that an item has been created and is awaiting approval. This email will be sent out when a user sends an item for approval.

7. In Salesforce Setup, under **Communication Templates**, select **Classic Email Templates**. Click the **New Template** button.
8. Leave the email template type as **Text**. Any option is valid as OrchestraCMS is agnostic to the format of the notification email.
9. Click **Next**.

10. For the email template set the details as	
Folder:	Unfiled Public Classic Email Templates
Available for use:	Selected
Email Template Name:	OrchestraCMSApprovalNotifications
Unique Template Name:	OrchestraCMSApprovalNotifications
Description:	Approval Notifications for OrchestraCMS
Subject:	{!cms__Approval__c.OwnerFullName} has submitted a new item for approval
Email Body:	There is a new OrchestraCMS item awaiting approval. Please follow this link to review the item: {!cms__Approval__c.Link}

11. Click the **Save** button.

The format of the subject line and body of the email is not a requirement of OrchestraCMS. These are only suggested values. The OwnerFullName field provides a way to identify who sent the item for approval and the Link field provides something in the email for the approver to click on that will take them directly into OrchestraCMS to the item to be approved.

The next step is to create the approval process itself. The steps that follow create a basic approval process. The approval process in Salesforce can be customized with additional steps to meet requirements you may have. Two points to note are:

- An approval process cannot be recalled through the OrchestraCMS interface.
- A user cannot select a specific user to perform the approval process through the OrchestraCMS interface.

12. In Salesforce Setup, expand **Create**.
13. Under **Workflows & Approvals**, select **Approval Processes**.
14. From the Manage Approval Processes drop down, choose the **Approval** object.
15. From the Create New Approval Process drop down, choose **Use Jump Start Wizard**.
16. Set the Name field to **OrchestraCMSApprovals**.
17. Click in the Unique Name field. It should auto-populate with the value from the Name field.
18. Select the email template you just created from the Approval Assignment Email Template field.
19. We will leave the Entry Criteria blank. This section would be used if you needed to only initiate approvals for specific kinds of content or under specific circumstances. Entry Criteria is also essential to the use of multiple approval processes.
20. Select the Queue you just created in the Automatically assign to queue field.
21. Click **Save**.
22. Click the **View Approval Process Detail Page** button.

The following steps are the bare minimum to have the approval process function. The steps can be customized to reflect the business logic of your approval requirements. Keep in mind the OrchestraCMS interface will not expose the underlying approval process functionality from Salesforce. OrchestraCMS only exposes functions to approve or reject the awaiting content or page. Any additional functions requiring interaction would need to be accommodated for at the Salesforce level.

23. In the Final Approval Actions section of the Approval Details click the **Add New** button and select the **Field Update** option.
24. Set the Name and Unique Name to **Publish**.
25. Set the Field to Update to **Status**.
26. Set the Specific value to **Approved**.
27. Click **Save**.
28. In the Final Rejection Actions section of the Approval Details click the **Add New** button and select the **Field Update** option.
29. Set the Name and Unique Name to **Reject**.
30. Set the Field to Update to **Status**.
31. Set the Specific value to **Rejected**.
32. Click **Save**.
33. Click the **Activate** button in the approval process' details screen.

Note

The users who will be performing the approvals need to have the appropriate OrchestraCMS permissions to view and publish the content. If Sharing is enabled the user needs to be added to the Collaborator share for the page or content in order to see it and approve it.

The final step is to enable the approval process in OrchestraCMS.

34. In OrchestraCMS Setup, select **Approval Process**.
35. Click the **Check Now** button. This checks for the approval process enabled on the Approval object in Salesforce.
36. Once the Approval Process is detected it can then be enabled on a site by site basis for each site you want to prevent users from directly publishing in. Toggle the switch at the bottom. It should switch to green meaning the process is enabled.

You may get an email telling you there is something to approve. This email can be safely ignored and is just a byproduct of enabling the process for the first time.

To view the working approval process you can log in as the user who was provisioned earlier as an OrchestraCMS Editor, access OrchestraCMS as that user, and create and submit a new piece of content. These steps are also covered in the OrchestraCMS User Fundamentals course.

At this point users who do NOT have the **Allow users with this profile to publish independently of the approval process** permission in their profile will see the Send for Approval Option when trying to publish content instead of the Publish option.



You can create multiple approval processes on the Approval object with different entry criteria so that you can meet requirements for different circumstances. For example

- Have different approvers for different OrchestraCMS sites
- Have different approval processes for pages vs. content

The Approval object has a limited set of fields. If you need additional criteria for approvals you can add custom formula fields to the Approval object for use in the entry criteria of the approval process.

Non-OrchestraCMS Pages

Sometimes developers may wish to expose Visualforce pages coded for use within Salesforce that they are not intending to use as templates within OrchestraCMS. OrchestraCMS provides the ability to expose Visualforce pages from within Salesforce via your site. The page is not exposed within the OrchestraCMS user interface for linking or management and is available only to site visitors for viewing using the Visualforce page name as the URL.

Keep in mind that OrchestraCMS will respect Salesforce licensing and permissions, so if the page contains elements that cannot be exposed to the visitor for Salesforce reasons, the visitor will not see that page. You would also need to ensure that the Visualforce page you are trying to expose has been added to either the public access settings or Salesforce profile of the site visitor who needs to see the page.

Typically adding a page here is only done for pages outside of OrchestraCMS at the request of your design team.

To enable this select Non-OrchestraCMS Pages from OrchestraCMS and use the Add button to get a list of available pages from Salesforce. Once the page is selected click Add. The page is now accessible by its name and the URL. For example

<http://mydomain.com/VFPageName>

Priority Levels

OrchestraCMS provides the ability to create dynamic lists of content through the use of a taxonomy. This is described in detail in the OrchestraCMS User Fundamentals course. These lists can be sorted alphabetically, by publish date or by priority. The OrchestraCMS administrators have the ability to define priorities and priority durations. The priorities are levels of importance and the durations are how long the priority will be applied to the content item. The priorities are defined through the Priority Levels option in OrchestraCMS Setup as shown.

Setup > Priority Levels

Priority Levels

Add, rename, delete and reorder Priority Levels.
None (Lowest) can be renamed but not deleted.
New levels are added at the end of the list.
Rank (1 - 99, where 1 is highest) is used in conjunction with duration to calculate priority weight.

Level Name	Rank	+
1	1	×
2	2	×
3	3	×
4	4	×
None		

Priority Expiry Durations

Define the expiry duration that can be applied to any priority level except None (Lowest). There must be one priority expiry duration.

Quantity	Unit of Time	+
6	Hours	
12	Hours	×
1	Day	×
2	Days	×
3	Days	×
4	Days	×
5	Days	×
6	Days	×
7	Days	×

When the priorities are defined authors and editors can apply those priorities in the properties of content in order to control the order in which dynamically loaded content is displayed. An example of this might be a list of corporate news articles loading on the company website by publish date. You then want to publish a tornado warning article informing you employees of the emergency procedures for the situation. You need to have that article appear at the top of the list without being pushed down by newly published content for the next 24 hours. The author would then assign it a priority of 1 and a duration of 24 hours.

Content Properties

Description

Start Date

Time

Priority

02/16/2017

03:45

PM

1 (Highest)

End Date

Time

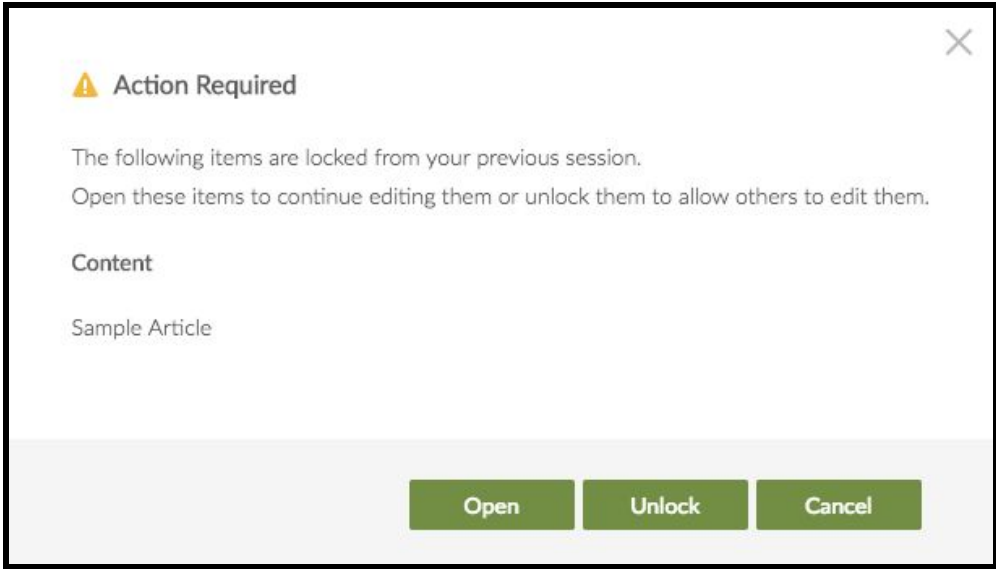
This priority expires

AM

24 Hours

Content and Page Locking

OrchestraCMS places a lock on pages and content when opened by an OrchestraCMS user to prevent other users from editing that page or content at the same time. The lock is released only when the user saves and closes the OrchestraCMS tab for that content or page in the OrchestraCMS user interface. If a user logs out or closes their browser tab the content will remain locked and the user is prompted to open or unlock the content the next time they open OrchestraCMS as shown below.



Users who view the page or content in listings will see the item listed with a status indicating it is locked and by which user.

<input type="checkbox"/>	Sample Article	1.0	Locked by Sample User
--------------------------	----------------	-----	-----------------------

If another user needs to get the item unlocked and the user who has the item locked is unavailable an OrchestraCMS Administrator can unlock the page or content in OrchestraCMS Setup, under Utilities, then Unlock, by selecting the item to be unlocked and clicking the Unlock button.

Setup > Unlock

Filter Options

Type

All

Locked Since

AM

Name

Start typing to filter the list

Locked By

Start typing to filter the list

Unlock

<input type="checkbox"/>	Name	Type	Locked Date	Locked By
<input type="checkbox"/>	Sample Article	Article	22 November, 2016	Sample User

Unlock

<input type="checkbox"/>	Name	Type	Locked Date	Locked By
<input type="checkbox"/>	DailyDigest	Page	22 November, 2016	Sample User

Unlock

If a user has an item open when it is unlocked by an administrator, the user will receive an error message, when trying to save changes, that the item is currently locked by another user and the changes will be lost.

As a best practice anything listed with a Locked Date older than 24 hours can safely be unlocked because the user's session should have been over hours before. However if it is under 24 hours every effort should be made to contact the user so they do not lose their changes.

Sandbox Refreshes

OrchestraCMS can be newly installed on any sandbox with Force.com Sites functionality. If you are going to refresh a sandbox from a production Salesforce instance that already has OrchestraCMS installed only a Full Sandbox refresh is supported. OrchestraCMS stores all of its supporting data including users, licenses, pages and content as records in Salesforce. If you do not do a full sandbox refresh then these records are not copied from production to the sandbox and your sandbox instance of OrchestraCMS will not be functional.

When creating a full sandbox from your production Salesforce organization the following list of tasks will need to be performed in the sandbox in order to have the sandbox instance of OrchestraCMS function correctly.

- The Remote Site Setting in Salesforce will need to be updated to reflect the sandbox Salesforce pod. ie.
 - The <https://login.salesforce.com> would need to be switched to <https://test.salesforce.com>
- The URLs in OrchestraCMS Setup listed under Site Details would need to be switched from the production org values to the sandbox org values
- You need to send the Salesforce Org ID for the sandbox and the Salesforce Org ID of the parent production org to customer-support@stantive.com so that Stantive can link your licenses to the sandbox org.
- Stop and Start the OrchestraCMS scheduler in one site to pick up on the new Salesforce User ID.
- Refresh your Page and Content Caches on all sites in OrchestraCMS to pick up on the sandbox URL changes.

For any sandbox that is not a full sandbox Stantive has a tool available called OrchestraCMS Shift that can be used to export data from a production site and import that data into a sandbox. For more information on OrchestraCMS Shift please contact Stantive support at customer-support@stantive.com.

Support for OrchestraCMS

Stantive technical support can be contacted via customer-support@stantive.com or by logging into the Stantive customer portal at <https://thepulse.stantive.com/>.

When logging cases with Stantive support, it is helpful to be able to identify a few key settings.

- **Salesforce Org ID** - This can be found in Salesforce Setup by expanding **Company Profile** and selecting **Company Information**. The required field is highlighted below.

The screenshot shows the Salesforce Setup interface. On the left, the 'Administer' sidebar is expanded to 'Company Profile', and 'Company Information' is selected. The main content area shows the 'Organization Detail' page for 'Stantive Technologies'. The 'Salesforce.com Organization ID' is highlighted with a red box.

Expand All | Collapse All

Salesforce1 Setup **New!**

Force.com Home

Administer

- Manage Users
- Manage Apps
- Manage Territories
- Company Profile**
 - Company Information**
 - Fiscal Year
 - Business Hours
 - Holidays
 - Language Settings
- Security Controls
- Domain Management
- Communication Templates
- Translation Workbench
- Data Management
- Mobile Administration
- Desktop Administration
- Email Administration

The organization's profile is below.

User Licenses (23) | Permission Set Licenses (3) | Feature Licenses (13) | Usage-based Entitlements (BETA) (0)

Organization Detail

Edit

Organization Name	Stantive Technologies	Phone	
Primary Contact	Darren Smith	Fax	
Division		Default Locale	English (Canada)
Address	unknown CA	Default Language	English
Fiscal Year Starts In	January	Default Time Zone	(GMT-05:00) Eastern Standard Time (America/New_York)
Allow Support to Activate Multiple Currencies	<input type="checkbox"/>	Currency Locale	English (United States)
Newsletter	<input checked="" type="checkbox"/>	Used Data Space	3.2 MB (64%) [View]
Admin Newsletter	<input checked="" type="checkbox"/>	Used File Space	23 KB (0%) [View]
Hide Notices About System Maintenance	<input type="checkbox"/>	API Requests, Last 24 Hours	0 (15,000 max)
Hide Notices About System Downtime	<input type="checkbox"/>	Streaming API Events, Last 24 Hours	0 (10,000 max)
		Restricted Logins, Current Month	0 (0 max)
		Salesforce.com Organization ID	00Dj0000001nmmp


- The build of OrchestraCMS currently installed - This can be found in Salesforce Setup by selecting Installed Packages, as highlighted below.

The screenshot shows the Salesforce Setup interface. On the left is a navigation sidebar with sections: 'Salesforce1 Setup' (with a 'New!' badge), 'Force.com Home', 'Administer' (containing links like Manage Users, Manage Apps, etc.), and 'Build' (containing links like Customize, Create, etc.). The main content area is titled 'Installed Packages'. It includes introductory text about AppExchange packages and a table of installed packages. The table has columns: Action, Package Name, Publisher, Version Number, Namespace Prefix, Status, Allowed Licenses, and Used Licenses. Two packages are listed: 'OrchestraCMS' (version 6.114.7) and 'OrchestraCMS Extensions' (version 2.25). The 'Version Number' for OrchestraCMS is highlighted with a red box. Below the table is a section for 'Uninstalled Packages' which currently shows 'No uninstalled package data archives'.

Action	Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed Licenses	Used Licenses
Uninstall	OrchestraCMS	Stantive Technologies Group	6.114.7	cms	Active	Unlimited	0
Uninstall	OrchestraCMS Extensions	Stantive	2.25	ocms_socfp	Free	N/A	N/A
Description OrchestraCMS Extensions Feature Pack							


- Granted Login Access - In order to troubleshoot some issues, it may be necessary for Stantive to access the instance of OrchestraCMS in your Salesforce org. This can be arranged by having an account with the necessary access grant login access within Salesforce, as shown below.


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[Grant Account Login Access](#)

Grant Account Login Access

Help for this Page 

To assist with support issues, you may grant your administrator or support personnel the ability to login as you and access your data.

My Username: **darren.smith.train20@stantive.com**

Grant Access To	Access Duration
Your Company's Administrator	--No Access-- 
Salesforce.com Support	--No Access-- 
Stantive Technologies Group Inc. Support 	1 Week (exp. 26/01/2015) 

Save

Cancel