OrchestraCMS User Fundamentals

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OrchestraCMS User Fundamentals Training

This document is intended to prepare web developers, content authors, content editors and other team members involved in the day to day updating of website content with the basic usage of the OrchestraCMS application.

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.

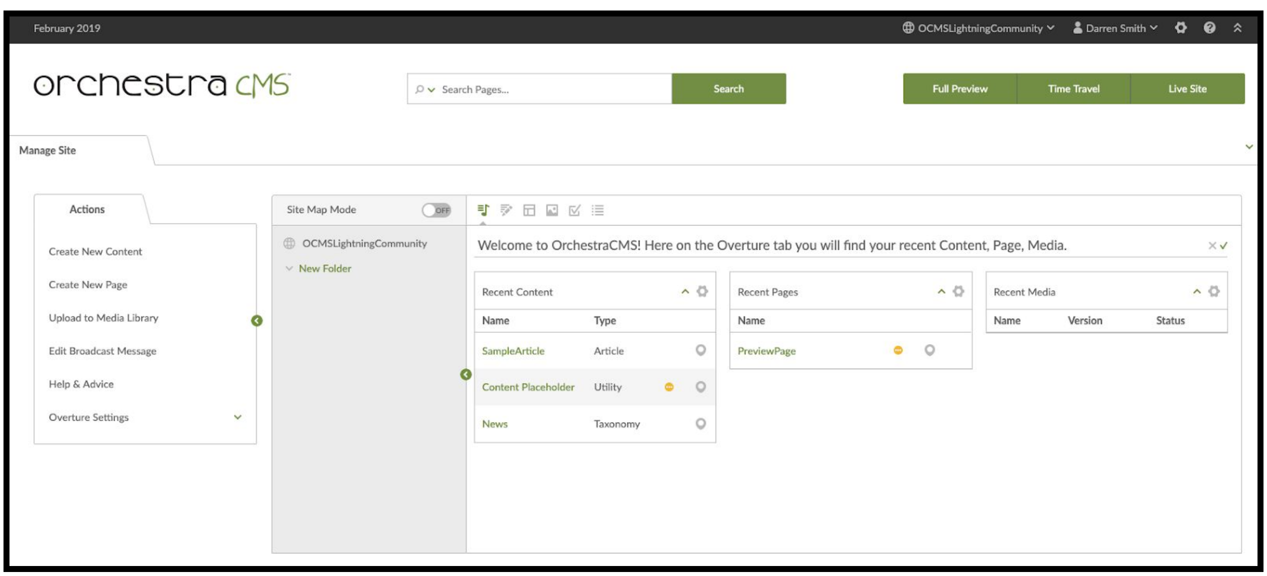
The collateral files for this course (**User Code Samples.zip**) can be downloaded from http://www.stantive.com/TrainingCollateral.

Basic User Interface

Once installed the OrchestraCMS application is available through your Salesforce instance. There are several common access methods and your organization may vary the access method based on configuration requirements.

- If Single Sign On is configured for your organization then you may simply access the application through a bookmark in your web browser.
- Some organizations require the users to log in to Salesforce and then drop them directly in the OrchestraCMS application
- Some organizations require the users to log in to Salesforce and then provide them an application launcher screen from which they can choose the OrchestraCMS icon.
- Some organizations may provide access to the Salesforce interface from which you need to select the OrchestraCMS application from the Salesforce App menu or the OrchestraCMS tab from any other application

Whichever the method, once you access the OrchestraCMS application you will be presented with an interface similar to the image below.



- OrchestraCMS version - Above the OrchestraCMS logo at the top you will see the version of OrchestraCMS currently in use by your organization
- User Icon - The top right corner of the application contains a user icon that offers the choices
    - Customize - Allows you to set some application behaviour preferences for your user account including Preview behaviour and page editor behaviour.

    - Logout - Logs you out of Salesforce and OrchestraCMS.
    - Back to Salesforce - Opens a new browser tab to display the Salesforce interface.
- Globe Icon - This allows you to select the site you are currently in when creating pages and content. The current site is indicated by a yellow globe.
- Gear Icon - This is only displayed if you are an application administrator and allows you to access OrchestraCMS Setup options.
- Minimize Arrow - This allows you to increase your workspace real estate by minimizing the application header containing the logo, search box and mode buttons.

Note	Sites are segregated. This means pages and content created in one site can only be accessed in that site. You may not have permissions to all of the configured sites. Access to sites is granted by your OrchestraCMS administrator.

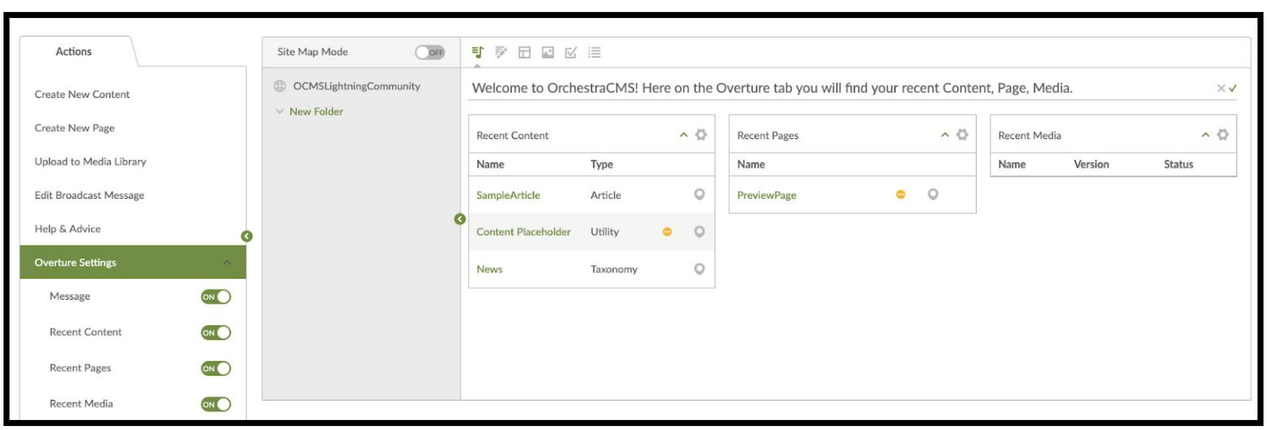
- Search - Located below the icon bar. This can be used to search for pages or content within the current site by name.
- Full Preview - Will open the Full Preview tab.
- Time Travel - Will open the Time Travel tab.
- Live Site - Will open a new browser tab directed to your live website.
- Manage Site Tab - Contains the following sub tabs.
    - Overture - Displays all of your recently edited content, pages and media along with any messages or instructions from the application administrator.
    - Pages - Access to page listings and the site map.
    - Content - Access to content listings.
    - Media - Access to files and folders in the media libraries.
    - Tasks - May be present and provides access to items awaiting approval for publishing.
- Actions Panel - This provides a context sensitive list of actions that can be performed for the content of the tab to the right.
- Site Map Mode - This toggle turns on / off the view of the OrchestraCMS Site Map
- New Folder - This allows users with the appropriate permissions to create folders for storing pages, content and media. The list of created folders will be displayed here as well.

OrchestraCMS divides the user manageable elements of a site into three components.

The elements of a site	
Pages	These make up the end result seen by users of your website, community or intranet. They are based on a Page Template developed by a design team and presented as a wireframe template onto which content can be added. Pages equate to the URLs of your website.
Content	These are the individual elements that can be placed on a page such as menus, logos, text, images and more. OrchestraCMS is content centric, meaning that a content item such as a menu may exist on many pages and editing the menu on the home page would reflect that update anywhere on the site that the menu is used.
Media	The displayable (images, video) and downloadable (PDF, audio) collateral offered on your site.

All of the exercises in this guide are to be performed in the **OpusMusicCommunity** site unless otherwise specified. Once you access OrchestraCMS, ensure you have selected the OpusMusicCommunity site from the globe icon in the top right.

When launching OrchestraCMS the tab that initially opens is referred to by OrchestraCMS as the Overture tab. Your Overture tab may have been renamed by your administrator. The options available to you in the Overture tab may also have been modified by your administrator so the view you see in your production instance may differ from the screenshot. The default configuration is described below.



The message line at the top of the Overture tab provides a method for the OrchestraCMS Administrator to post system messages to all users of OrchestraCMS. The **x** can be used to remove the message and provide more working real estate on this tab.

The Recent Content panel provides a list of all the content you have recently edited. Clicking on an item in this list will open that piece of content for editing in a new OrchestraCMS tab. The content of this panel is listed in order from most recently edited, down. You can use the pin icon next to any item in the list to pin that item to the top of the list so it will not be moved down the list as you continue to edit new content. The Create New Content action will open the Create New Content wizard so you can create a new piece of site content. This is the same wizard that is opened when clicking the Add New Content action on the Content tab discussed later.

The Recent Pages panel provides a list of all the pages you have recently edited. Clicking on an item in this list will open that page for editing in a new OrchestraCMS tab. The content of this panel is listed in order from most recently edited, down. You can use the pin icon next to any item in the list to pin that item to the top of the list so it will not be moved down as you continue to edit new pages. The Create New Page action will open the Create New Page wizard so you can create a new page for the site. This is the same wizard that is opened when clicking the New Page action on the Pages tab discussed later. Any pages created from this panel are stored under the Unmapped Pages node on the Pages tab.

The Recent Media panel provides a list of all the media you have recently uploaded. Clicking on an item in this list will open the Media tab in OrchestraCMS with the media you clicked listed. The content of this panel is listed in order from most recently uploaded down. You can use the pin icon next to any item in the list to pin that item to the top of the list so it will not be moved down as you continue to add media. The Upload to Media Library action will open the Upload to Media Library dialog so you can add new media files to the site. This is the same wizard that is opened when clicking the Upload action on the Media tab discussed later. This is provided as a means of quickly locating content you have recently uploaded.

The Help and Advice popup is accessed by clicking the Help & Advice action. It provides instructions and best practices for using your OrchestraCMS implementation, provided by your administrator.

The Gear icon on the corner of each panel can be used to change the data displayed about each item including Version, Description, Status, Start Date, Expiry Date, Last Modified Date and Locked Date. It can also be used to increase or decrease the number of items to be displayed in the panel. The Overture Settings action can be used to turn on or off any of the panels shown.

The folders panel displays folders for storing content, pages and media visible to all users. If Site Map Mode is enabled the Site Map is displayed here as well.

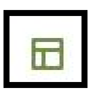
Creating Pages

The base unit of your website is pages. Generally speaking, for each page you wanted to have on your website you would need to create another page in OrchestraCMS. The following exercise outlines the basic procedure for creating a page in OrchestraCMS. It will highlight some of the key steps in creating a page. Please perform these exercises in the OpusMusicCommunity site.

1. Access the OrchestraCMS application from the Application menu in Salesforce.

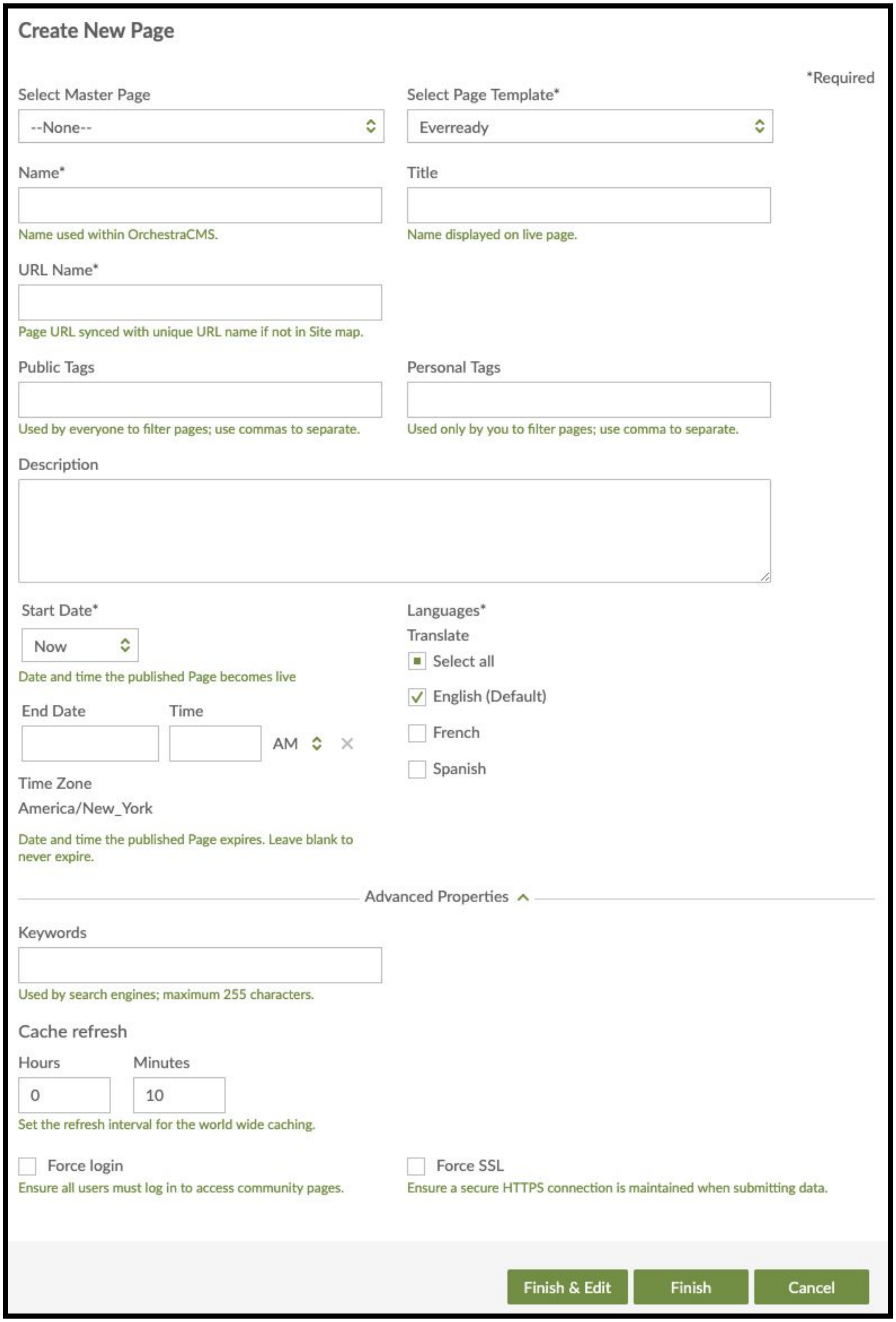
Once in OrchestraCMS, you can verify the current site by clicking the globe icon in the top right corner. The OpusMusicCommunity site should be indicated as your current site by a yellow globe. If it is not indicated select the OpusMusicCommunity site. If there is only one site available to your account, only the one site will be listed. If there are multiple sites, then you are dropped into the last site you used by default each time you open OrchestraCMS.

2. Click the **Pages** icon if it is not the current icon.



3. Click the **Create New Page** action in the Actions panel to the left.

This will launch the Create New Page wizard shown.



4. Fill in the Name Field with **Home Page**.

This will be the name displayed for this page anywhere in OrchestraCMS. It is best practice to use only alphanumeric characters within the name. This name will also be displayed to your site visitors when a user searches your site for a page, so it will be public facing.

A strong naming convention is the key to helping your users locate pages and content in OrchestraCMS. Work together with your team to come up with a standard for naming your content and pages before beginning your project to make locating them easier in the interface.

Some examples might include

- **Regional Naming**
  - [Region]-[ContentType]-[Summary]
- Examples
  - NA-Article-FluShots
  - EU-TextBlock-WelcomeMsg
  - APAC-Menu-LeftNav

- **Role Based Naming**
  - [Department]-[Function]
- Examples
  - HR-LandingPage
  - HR-Documents
  - IT-Tools
  - IT-Scheduling
  - IT-FAQs

- **Product Based Naming**
  - [Type]-[Brand]-[ProdCode]
- Examples
  - Radio-Samsung-E320
  - TV-LG-500S
  - Appliance-Kenmore-HT605

A great place for your administrator to keep the outline of your naming convention is on the Help & Advice popup of the Overture tab.

5. Fill in the Title field with **My Site**.

This is the value that will appear in the browser title bar or tab when users visit this page within your site as shown below. A proper title is also part of good Search Engine Optimization practices so that your page will be considered more relevant by Search Engines.

6. Leave the Start Date set as **Now**.

If this is set for a future date/time the page will not be accessible to site visitors until that date/time. Attempts by visitors to the site to access the page before that time will result in a “Page Not Found”.

7. Leave the End Date field blank.

If this is filled in the page will no longer be accessible after that date/time. Attempts by visitors to the site to access the page after this date/time will result in a “Page Not Found” message. The page will still be accessible in OrchestraCMS but it will not be available on the live website.

Note	Links to this page will not automatically expire at the same time. Any content (menus, links, images…) that link to this page should be configured to expire at the same time as the page.

Both pages and content can have multiple versions with consecutive start and end dates. For example in the table below the Sales page has several versions lined up, each consecutive version will go live when the previous version expires. These are all the same page. This would allow you to configure the next three weeks worth of updates to the Sales page at one time.

Version	Start Date	End Date
Sales v1.0	Now	January 12 11:59pm
Sales v2.0	January 13 12:00am	January 19 11:59pm
Sales v3.0	January 20 12:00am	January 26 11:59pm

8. Enter **This is the home page for my site** in the Description field.

Anything entered in this field is then included in the final HTML markup of the page as the META Description tag as shown below. A precise description is one of the best practices for good Search Engine Optimization.

<meta content="This is the home page for my site" name="description">

If the OrchestraCMS Administrator has enabled the options, you may also have the Public and Personal Tags fields. These can be filled in with any keywords or metadata you want to use to filter the list of pages when displaying them in OrchestraCMS. They have no impact outside of OrchestraCMS and are not included in the final markup of the page. This means visitors to your website will not see this information. Tags play a key part in locating pages and content in OrchestraCMS. Best practice is to work with your team to develop a common list of tags everyone will use. When filtering your view of page and content lists you can use the tags to locate the relevant items.

9. Select all three of the available languages.

Your OrchestraCMS Administrator defines the list of available languages that pages and content can be translated into. Selecting the languages does not translate the page it only makes the properties available to be translated into the selected languages. The translations must still be manually entered by someone in OrchestraCMS. We will explore how that is done later in the course.

10. The URL Name field is automatically populated based on the value of the Name field in the previous dialog. Set it as **Home**.

This will be the URL by which this page is accessed on your site. This could be changed at any time.

The Keywords field will populate the **Meta Keywords** tag in the resulting markup of the page as shown below. Best practice for Search Engine Optimization is to include a select set of relevant keywords.

<meta content="Home, Site, OurBusiness" name="keywords">

11. Expand the Advanced properties section at the bottom of the dialog. You may need to scroll down to see the Advanced properties.
12. Place a few keywords in this field separated by commas.

The Cache Refresh impacts how long before the cached version of the this page within the Content Delivery Network used by Salesforce exists before it is marked dirty. There is no reason to change this from the default value of 10 minutes. Increasing the value may cause a delay in changes you publish to the page showing up for visitors to your live website. Decreasing the value will increase the hit rate on your server and may lead to limit exceeded messages on your site.

13. Leave the Force SSL unchecked.

If this field is checked, any attempt to access this page automatically switches the user's connection from HTTP to HTTPS. The primary use of this is when a page needs to communicate information to or from the visitor in a secure session.

14. Leave the Force Login box unchecked.

If this box is checked, it redirects any user who is not logged in to the default login page for the site.

A list of the available page templates is available in the Select Page Template drop down. Page templates provide the preconfigured layout for your page. The available list is determined by your OrchestraCMS administrator.

15. Choose the **Everready** Page Template.
16. Leave the Select Master Page drop down as none for now. We will change this setting later.
17. Click **Finish & Edit**.

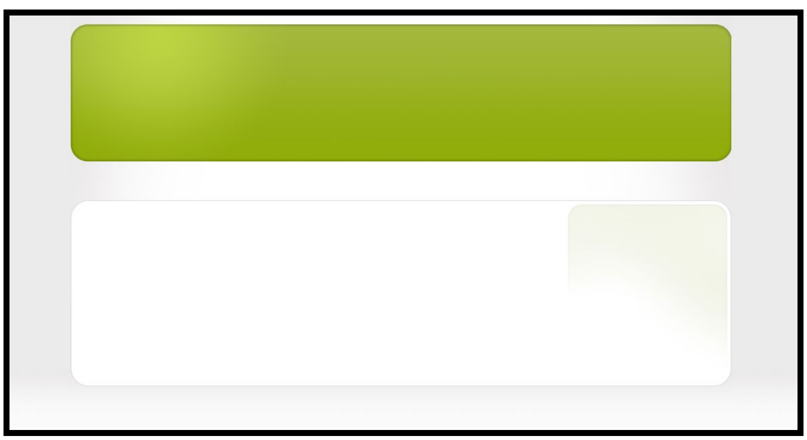
The page should open in the Page Editor view in a separate tab in OrchestraCMS. Each of the properties set during the creation of the page can be accessed via the Properties action.

18. Click the **Properties** action and panel should pop out from the right side of the page editor. The options should look familiar from the creation of the page.
19. Pull down the **General** menu and select each of the options. Each one exposes a different set of the page properties.
20. Click the **Cancel** button.
21. Expand **More Actions** and select **Add a Page Template**. You can switch the page template from one to another. If you do this, keep in mind that content currently on the page may no longer be displayed on the page if there is no matching panel in which to display it. Do not switch the template at this time.
22. Click **Cancel**.

23. Click the **Publish** action. Publishing a page locks that page from further editing and makes the page available to visitors to your site, unless the Start Date property was set in the future in which case the page is not available until that date/time.
24. Click **OK**. Notice the view of the page editor changes and the panels disappear. The page is now locked from editing.
25. Click the **Live Site** button.

This should open another browser tab/window to your live site, for example http://yourdomain.com/. You will see a “URL No Longer Exists” message, since we have not specified the URL of the page we published.

26. Change the URL to add the page name to the end. For example http://yourdomain/Home
27. You should now see the page with no content.



Back in OrchestraCMS on the tab where your page is open, note that the Save action is greyed out. No changes can be made to the page until we create a new version.

28. Click the **New Version** action.

The page should switch back to the edit view with the panels now accessible again. Note that the icon on the tab for the page changes to include a yellow circle. This symbol indicates a page or content that is unpublished. Note also that the version number has been updated on the tab.

29. Click the **Properties** action.
30. On the pop out panel that opens from the right, click the **Translate Properties** button.

OrchestraCMS supports multilingual content and pages. All of the properties of the page that are externally exposed are translatable in the languages you selected when you created the page. This allows you to have your site served up in different languages to different visitors. For now we will focus on the URLs and come back to translating the properties at a later step.

The current URL for the page is /Home which is what we used to access it in the live site. OrchestraCMS supports vanity URLs which allow you to add additional URLs to the page properties that can then be used to access that page.

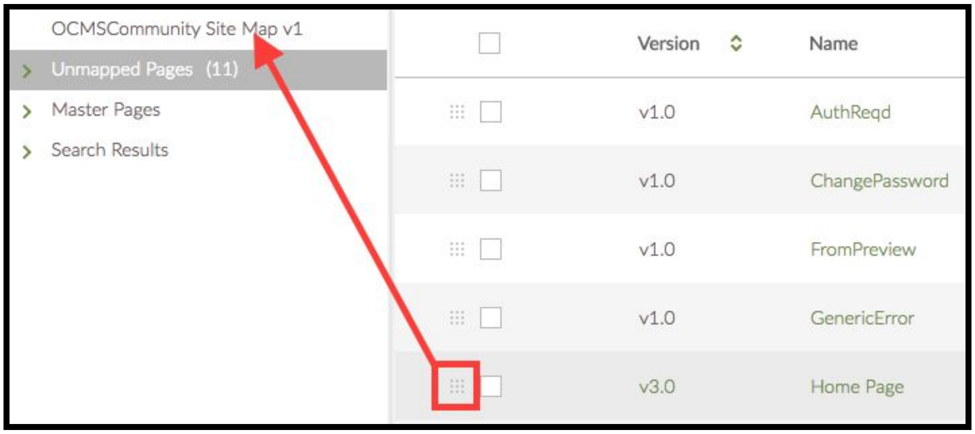
31. Click the Add button on the English side of the dialog. In the dialog that pops up enter the URL *yourlastname*Home and click the **OK** button.
32. Click the **Save** button on the page properties.
33. Click **Save** on the Properties panel.
34. Try to use this new URL to access the page via the Live Site button (ie. http://*yourdomain*/*lastname*Home . You should get a URL No Longer Exists message.
35. In OrchestraCMS click **Publish** on the page. Once the page is published, try accessing the lastname URL in the live site again. This time it should work. This is reinforcement of the concept that changes made to a page or content are not available to site visitors unless the change is published.
36. In OrchestraCMS, on the tab where your page is open, click the **Expire** action. Set the Expiry Date to **Now** and click the **Expire** button. On the live site try reloading the page. You should now get a URL No Longer Exists message. Once a page is expired, you need to create a new version and publish it before it will be accessible to site users again.

Note	Pages cannot be deleted once published. This was done to meet compliance concerns. In order to have a page no longer publicly accessible, you must expire it.

The icon highlighted below indicates an expired content or page.

37. In OrchestraCMS, on the tab where your page is open, click the **New Version** action. Note that the expired icon is now replaced by the unpublished icon on the OrchestraCMS tab for the page.
38. Close the edit page tab in OrchestraCMS for the page you have open.

39. On the Pages tab toggle the Site Map Mode to On.
40. In the Unmapped Pages node grab your page from the list on the right via the textured grab area highlighted below and drag it to the Site Map node of the tree on the left.



The Site Map serves two key functions in OrchestraCMS.

- The page placed at the top of the site map becomes the default page for that site. Anyone visiting the site without entering a URL for a specific page (ie. https://www.domain.com vs. https://www.domain.com/Home) will be taken to the default page. This default page can be changed at any time. Like all changes in OrchestraCMS if you change the home page in the site map you must publish the site map for the change to take effect.
- To provide a piece of content that can be placed on a page as a table of links to some of the key pages in your site. Any hierarchy of pages you build here can be added to a page as a hierarchy of links visitors could use to navigate your site.

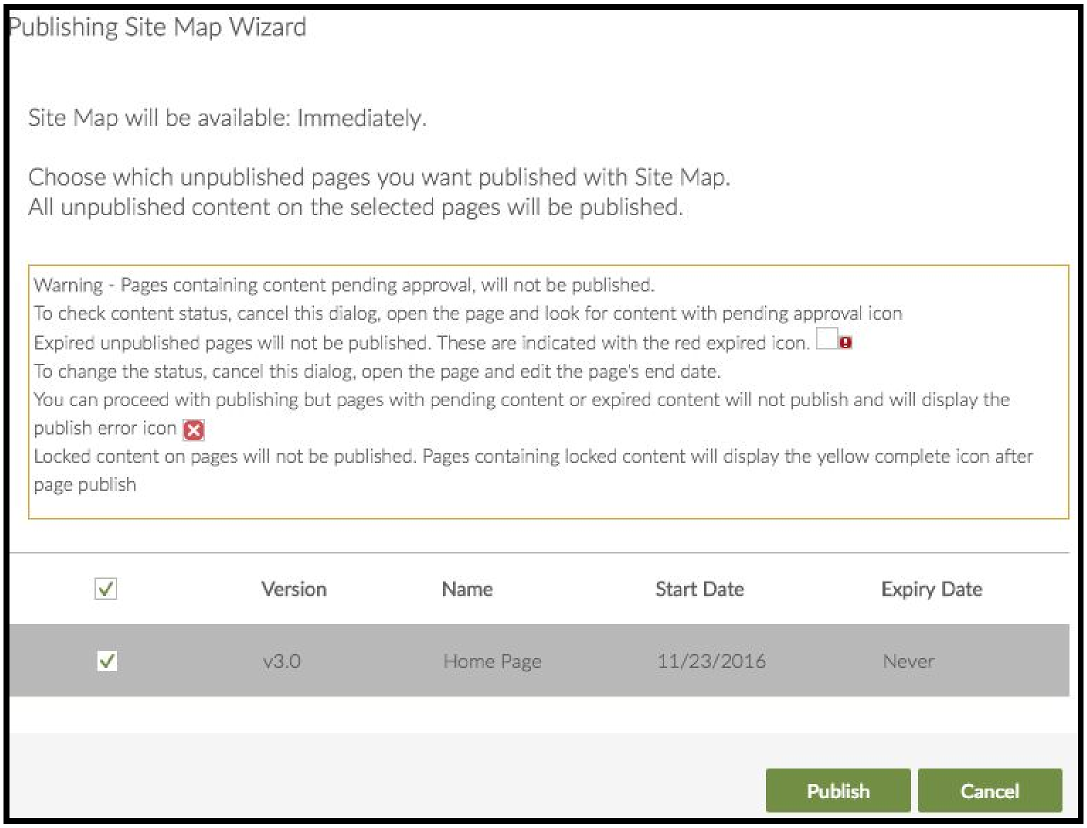
Important	The site map can only hold a limited number of pages. The more languages your site is translated into the less this number is. Keep in mind that the site map is for use as a navigational aid to your site visitors. A table of over 200 links is not much use as a navigational aid. It is recommended you do not store more than 200 pages in the site map.

The page will no longer be listed in the Unmapped Pages node and is now only accessible through the Site Map tree. By placing it at the top of the Site Map node, you have made this page the root of your website. It will now be accessible through the URL http://yourdomain.com/ . In order to observe this, we must first publish the Site Map.

41. Highlight the Site Map node in the tree and click the **Publish** action.

You should get the dialog shown below prompting you to publish the sitemap and also offering you the ability to publish any currently unpublished pages at any point below that node. You can uncheck any pages you are not currently ready to publish. For this exercise we are going to publish your page, so do NOT uncheck it.

42. Click the **Publish** button.



43. When the Publish Complete message is displayed, click **Done**.
44. Now you can access this page via three URLs.
    - http://yourdomain.com/
    - http://yourdomain/Home
    - http://yourdomain/*lastname*Home

Test each of these from your live site browser tab.

Note	If your administrator has enabled the Unique URLs feature of OrchestraCMS then this behaviour changes and two rules are enforced: ● Any pages in the Unmapped Pages node MUST have an additional URL assigned in order to be accessed from the site. ● Any pages in the Site Map tree are accessible as follows: 1. By their position in the Site Map; AND 2. By any Additional URLs added to the page properties.

Important	Adding an additional URL to a page in the Site Map would invalidate the reason for using unique URLs.

For example: If you placed a page called “LandingPage” under the homepage you just added to the tree and then placed a page called “ProductDetail” under that page (see image below), the URL to ProductDetail would be http://yourdomain/LandingPage/ProductDetail (due to its placement in the Site Map).

If you then added an Additional URL to ProductDetail (e.g. /myProduct/ProductDetail), then ProductDetail would ALSO be reachable from http://yourdomain/myProduct/ProductDetail.

For this reason, if your Administrator has enabled Unique URLs, you should choose only one method of specifying the URL – via the Site Map **or** Adding an Additional URL.

Additional URLs are also useful when you want the appearance of a directory structure on your website. OrchestraCMS does not provide folders for you to store your pages in. This means that by default all OrchestraCMS URLs are off the root of your website. For example you may have a page on your website that contains best practices for your IT department. If the URL of the page when you created it was "BestPractices" then the URL on your site would be http://yourdomain.com/BestPractices. If you wanted the page to be available as http://yourdomain.com/IT/BestPractices you would need to add the additional URL as /IT/BestPractices.

Once a page has been added to the Site Map, you need to use the Remove from Site Map icon to move the page back to the Unmapped Pages node.

45. Highlight your HomePage in the Site Map tree and click the icon as shown below. Click **Yes** when prompted.

The page is no longer listed in your Site Map but is now located again in the Unmapped Pages node.

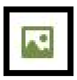
46. Click on the **Unmapped Pages** node to see the page.
47. Open the page from the Unmapped Pages node.

OrchestraCMS provides the ability for you to get a preview of how the page will look on the live site by opening the page and clicking the Preview action. This allows you to confirm the page changes are acceptable prior to publishing. The Preview opens in a new tab of OrchestraCMS and displays what the page will look like with all of the current elements on it.

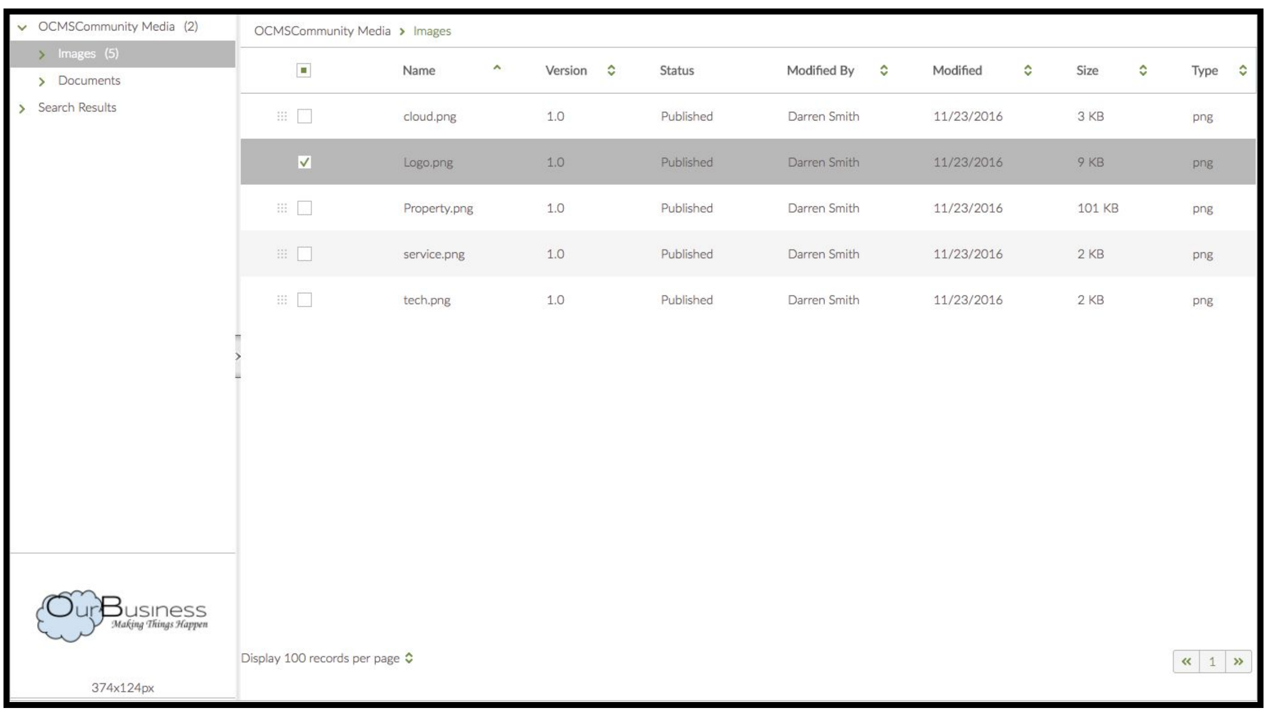
48. Click the **Preview** action in the Actions panel now to observe this behaviour and then close the new OrchestraCMS tab that gets opened.

An OrchestraCMS Media Library is a repository for hosting files for use with your site, Intranet or community. These repositories can reside on either the Amazon, Google or Salesforce clouds. If the repository is hosted in Salesforce, the maximum size of a file you can upload is 25MB. If in doubt about the limitations, you would need to consult your OrchestraCMS administrator.

1. To access the media libraries, select the **Media** icon on the Manage Site master tab.



The left pane contains the Library tree. The right hand pane contains the file listings for the node you have selected on the left. The bottom left displays a thumbnail of the selected media file if it can be generated.



Thumbnails are only provided for images, other file types will not display a thumbnail. If you wish to confirm the content of any other file type the option is provided to download a copy of the file when you hover over the file name by clicking the download icon as shown.

2. Now we will create a folder to organize your media. Highlight the OpusMusicCommunity Media node. Click **New Folder** in the Actions panel on the left. Assign the name **Images** to the folder. This is just a label and can be any value you want. Click **OK**.
3. You can now expand the OpusMusicCommunity node choose the Images folder from the tree on the left. Click the **Upload** action. Allow a second for the Choose Files button to appear.
4. Click the **Choose Files** button and select the **Property.png** file from the location where you extracted the downloaded **User Code Samples.zip** provided with the course materials.

Keep in mind the file size limit of 25 MB per file.

As a best practice it is best to stick with alphanumeric characters for the filenames. We are going to use some media files in the exercises. Please follow the steps below to upload these media files to OrchestraCMS.

In addition to using the Choose Files button you can also drag and drop in your files to add them in bulk.

5. Locate the location where you have stored the files you extracted from the User Code Samples.zip. Select Logo.png, cloud.png, service.png and tech.png as a group and drag them from your system into the Upload dialog.
6. When you have all the files dragged in click the **Upload** button.
7. Once complete, each file is indicated by a checkmark. You can then click the **Close** button. The images you uploaded should now be listed on the right when the Images folder is selected in the tree on the left.
8. Click the checkbox next to the Logo.png image in the list on the right. You will see a preview of the image in the bottom left of the Media tab.

From the Manage action you now have four options for the file:

Rename - Allows you to rename the file in the media library. Renaming the file has no effect on any links pointing to the file.
Delete - If a file is deleted from the media library it is difficult to recover. This action should not be taken lightly. Any references to the file will then result in a broken link that you will have to manually resolve.
View Connections - Prior to deleting a file you can use this option to view a list of all the OrchestraCMS content that uses or contains a reference to that file. This allows to you to resolve those links prior to removal of the file.
Edit Metadata - Allows you to assign custom metadata to the files for reporting purposes in Salesforce.

The Media Library is not limited to image files. It can also be used to store any other types of files you might offer up for download from your site. Examples include PDF files, videos, documents and audio.

Note	Streaming video is not supported from files stored in an OrchestraCMS media library hosted on Salesforce. For video streaming you may need to talk to your Administrator about setting up an OrchestraCMS media library hosted on Amazon.

Media files cannot be directly added to a page in OrchestraCMS. For example you could not take the logo.png file and drag it onto a page. Once media has been added to the media library you will need to create content to expose the media files. We will create an About Us page and add a Slider content to demonstrate how media is exposed via content.

1. Click the **Pages** icon.
2. Click **Create New Page**.
3. Set the properties as outlined and click **Finish & Edit**.

    - Name : AboutUs
    - Title : About Us
    - Description : About OurBusiness
    - Language : English
    - Page Template : HarmonyFullWidth

4. Click in the General Content Area panel and choose **Add New Content**.
5. Set the properties as outlined and click **Finish & Edit**.

    - Content Type : Slider
    - Name : AboutUsSlider
    - Language : English
    - Content Template : Image Slider

The Slider content allows the user to configure the behaviour of the carousel without having to write a javascript. You can configure the transition behaviour of the slides as well as links and text within each slide.

6. Click **Select**.
7. Browse the media library and select the **tech.png** image.
8. Click **Select**.
9. Enter **Tech** as the Alternative Text.
10. Click **Add New Item** at the bottom of the content editor.
11. Click the second **Select**.
12. Browse the media library and select the **cloud.png** image.
13. Click **Select**.
14. Enter **Cloud** as the Alternative Text.
15. Click **Add New Item** at the bottom of the content editor.
16. Click **Select**.
17. Browse the media library and select the **service.png** image.
18. Click **Select**.
19. Enter **Service** as the Alternative Text.
20. Click **Save** on the slider content.
21. Close the OrchestraCMS tab for the AboutUsSlider.
22. Select the OrchestraCMS tab for the AboutUs page and click the **Preview** action.

Make note of the user controls which let you navigate through the slides. Each slide can also link to a different page in the site or have overlay text supplied.

We created content in OrchestraCMS to expose the images we uploaded to the Media Library since you cannot put the images directly on the pages in OrchestraCMS.

OrchestraCMS treats each of the elements a user might place on a page as Content. The Manage Content User Guide in the OrchestraCMS documentation outlines all the properties of all the different content types. These exercises will illustrate some of the basic concepts without exploring all the possible content templates.

Just like the page creation wizard can be launched from a variety of locations, so to the Create New Content wizard can be launched from different places. Content is independent of a page meaning you can create a piece of content and use it on multiple pages.

We are going to create a block of text welcoming people to our site and then we will put that content on the home page we created previously.

1. Click the **Content** tab in OrchestraCMS.
2. Click the **Create New Content** action.
3. From the Content Type drop down, choose **Text**.
4. From the Content Template drop down choose **Document Style 1**.

Each Content Type is just a grouping of content templates and may have several Content Templates associated with it. The Content Template determines the properties available for the user to edit when creating the content.

5. Enter **Welcome Message** in the Name field.
6. Enter **Welcome Message Text** in the description field.

The text in the Description field is used along with the Name field when searching for the content in OrchestraCMS. The description field on content is never exposed to visitors to your website. This makes it very important to include relevant information in the description field to help your OrchestraCMS Editors and Authors in locating content in OrchestraCMS. One best practice is to include the names of any pages or files that a content item links to, in the description of the content. This eases the process of finding which content links to which files when users need to update links later. You can also use the View Connections action on a content item to view any pages that content was placed directly on.

The Start and End dates work the same as they do with Pages so that content is not displayed on a live page if the current date/time does not fall between the Start and End dates. Leave the End Date blank and the Start Date as Now.

Each piece of content can be manually translated into the languages configured by your OrchestraCMS Administrator. When creating a content item, you select the language(s) you want to make that content available for translation into. Languages can be added at any time by creating a new version of the content.

Note	Languages cannot be added to new revisions. You must make a new version to add languages.

7. Select all three available languages now.
8. Click **Finish & Edit**.

If you had clicked Finish you would have returned to the list of content. By clicking Finish & Edit a new tab is opened in OrchestraCMS to allow you to edit the content. The same screen can be reached by clicking on a piece of content from the Content tab.

Each content template will have different data that it needs to collect from you so the content editor interface will have different fields depending on the content template you pick when creating the content.

Some of the content templates make use of a rich text editor called CKEditor, shown below. The CKEditor uses HTML to represent the formatting for any text, images, tables or other elements you might add to the dialog.

The following is a list of some of the key features of the CKEditor.

CKEditor Features
Top row, left to right

- Source - This switches the view between WYSIWYG (What You See Is What You Get) and the underlying HTML markup. You can directly edit the markup in the Source view if you know what you are doing. However this utility may alter the markup you supply.
- Cut, Copy, Paste - These three buttons provide the standard cut, copy and paste functionality.

- Paste as Plain Text - Removes the formatting from whatever you have copied to the clipboard and pastes it into the editor as plain, unformatted text.
- Paste from Word - Used when copying/pasting content from MS Word into the editor. This is needed to strip any extraneous markup that may have been included by Word.
- Undo, Redo - These two buttons allow you to undo the change you just made or redo the last undo you just made.
- Find, Replace - Allows you to find and/or replace all instances of specified text, found within the editor.
- Select All - Select all the content of the text editor.
- Spell Check - Spell check and thesaurus.

Second row

- Bold, Italic, Underline, Strikethrough, Subscript, Superscript - Standard text formatting options.
- Remove Formatting - Will remove any formatting from the selected text.
- Numbered List, Bulleted List - Create numbered or bulleted lists. You can control the type of numbering or bullet styles.
- Decrease Indent, Increase Indent, Block Quote, Align Left, Center, Align Right, Justify, Text Left to Right, Text Right to Left - Positioning commands.
- Link, Unlink, Anchor - Link the highlighted text to a page, file, external URL or anchor within the same page.

Third row

- OrchestraCMS Media - Directly link to select a file from the OrchestraCMS Media Library.
- Image - Insert an image from the OrchestraCMS media library into the editor.
- Flash - Insert a Flash animation from the OrchestraCMS media library into the editor.
- Insert a video - Currently supported providers include Vimeo, YouTube and Dailymotion.
- Table - Insert a table with rows, columns and cells into the text editor.
- Insert Horizontal Line - Inserts a horizontal line between sections of text.
- Smiley - Insert smiley characters.
- Insert Special Character - Provides access to non keyboard characters like trademark and copyright.

Bottom row

- Styles - Select from a list of predefined styles to be assigned to the selected text.
- Format - Select from a list of predefined formats to be assigned to the selected text.
- Font - Select from a predefined list of fonts for use with the text.
- Size - Select from a predefined list of text sizes.
- Text Color - Select a colour for the text.
- Background Color - Select a background colour for the text.
- Maximize - Enlarge the editor to its maximum size.
- Show Blocks - Show all the <DIV> containers in the HTML.
- Taxonomy Link - Define selected item as a link to the taxonomy detail page.
- Image - Insert an image from the OrchestraCMS media library into the editor.

The corner grab point in the bottom right is used to drag the text editor panel and resize the viewable area.

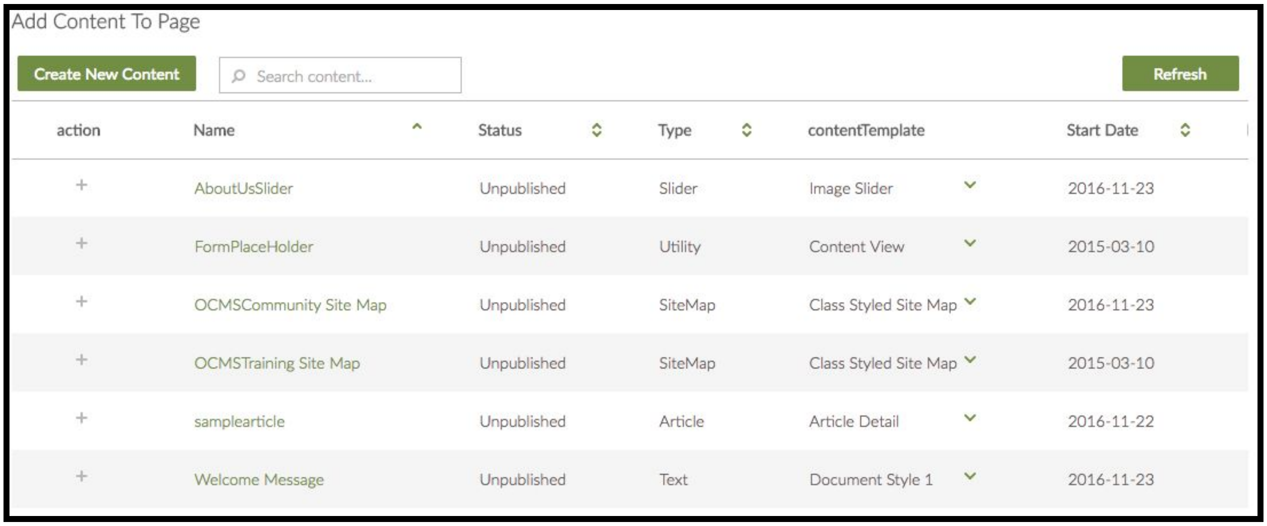
Once you start inserting elements such as list, tables and links you will be able to right click on those elements and get a context sensitive menu that lets you select the properties of the element. For example right clicking on a link will let you edit the properties of that link.

8. Enter **Welcome to my site** as the body text in the text box displayed.
9. Click **Split View** in the Actions panel. This will open a split screen view that allows an OrchestraCMS user to add translations for each of the selected languages.
10. Enter **Bienvenue sur mon site** as the body text in the text box as the French translation and set the Requires Translation as **Translated**. Click **Save**.
11. Drop down the language on the right and choose **Spanish**.
12. Enter **Bienvenidos a mi sitio** as the body text in the text box as the Spanish translation and set the Requires Translation as **Translated**. Click **Save**.
13. Close the Welcome Message tab in OrchestraCMS.
14. Open your Home Page for editing from the Overture tab in the list of Recent Pages. Click the **New Version** action if it is not currently editable.

Each of the “Click to Add” areas in the page editor view represents a panel that can be used to place content on the page.

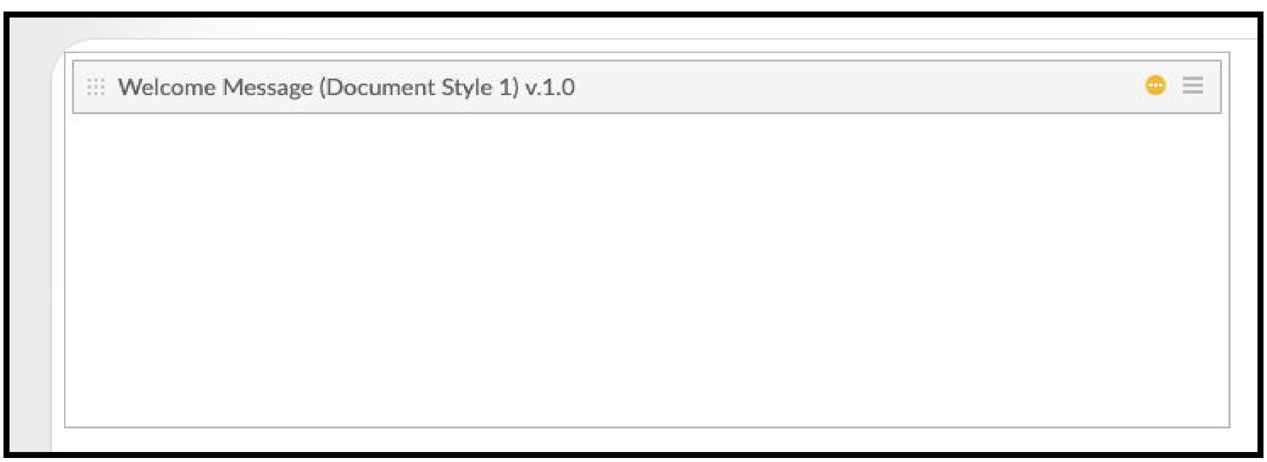
15. Click in the area highlighted below and choose **Add Existing Content**.
    - The Add New Content will walk you through the same wizard you just used to create new content on the Manage Content tab. This content would then be placed directly in the panel without the need to locate it in the Add Existing Content list.
    - The Remove All option will remove all the content from that panel.
    - The Add Content by Taxonomy allows you to find specifically tagged content to be added. Taxonomies will be covered in a later exercise.

In the Add Content dialog you are given a list of all your content.



2. The content can be opened by clicking its name in the list. Click the **Welcome Message** content in the list to see it open in a new tab in OrchestraCMS. Close the Welcome Message tab in OrchestraCMS once you have viewed it.
3. Clicking the + sign next to a piece of content adds it to the active panel on the page template. Click the **+** sign next to the **Welcome Message** content. Now click the **X** in the top right of the Add Content dialog.

Content is represented on the page by a content widget that tells you the name of the content and the Content Template used to place it on the page as highlighted below.



4. To see how this would look on the live site, you can click the Preview action to open a preview of the page in a new OrchestraCMS tab. Click **Preview** in the Actions panel now.

This is not what would be appearing on the live site at this moment. This is an unpublished change. To have the modification appear on the live site you would need to publish the new version of the page and the content item you placed on it.

The Preview tab also supports the ability to select the language you want to preview the page in so that you can ensure it appears properly in each of the languages selected when you created the page.

5. Drop down the Preview toolbar by clicking the little green arrow in the top middle of the Preview tab.

The Preview toolbar is automatically minimized. If you want to have the Preview toolbar automatically maximized each time you preview you can set this as a preference using the Customize option of the User icon in the top right of OrchestraCMS.

6. From the Select Language to preview drop down, choose **French**. Your welcome message content should now display the French translation provided.
7. From the Select Language to preview drop down, choose **Spanish**. Your welcome message content should now display the Spanish translation provided.
8. Make a note of where the welcome message text appeared. Now close the preview tab in OrchestraCMS.
9. Using the textured area at the left hand edge of the content widget click and drag the content to the vertical panel on the right.
10. Now click the **Preview** action and see how the content has moved on the page. Close the Preview tab.
11. Click the menu icon on the right hand side of the content. This offers the choice to Edit Content or Remove Content. Edit Content will open the content in a new OrchestraCMS tab. Remove Content will remove this instance of the content from this page but does not delete the content. Close this new OrchestraCMS tab.

OrchestraCMS is content centric, meaning that if you open an instance of a content item from the Manage Content tab or from an instance of the content on a page and edit it, that edit will apply to anywhere that content is used. For example if the Welcome Message content appeared on the Home Page and also on a Login Page and you opened it from the HomePage and changed the text, the edit you make to the text will also appear on the Login Page.

Master Pages

OrchestraCMS provides a feature for easing content administration called Master Pages. A Master Page is used when you have content that will be displayed on many pages – for example: menu, logo, footer. This is done so that if you need to replace one of these pieces of content you would not have to edit every page that content appears on just the master page that was applied to those pages. When you are applying a master page to a regular page, you should ensure they both use the same page template. Any content that exists in a panel on the master page that does not have a matching panel on the target page will not be displayed.

Additionally, you cannot apply a master page to a page that has more selected languages than the master page. For example, if the master page has French and English selected as the languages it is available in, you would not be able to apply it to the HomePage that has French, English and Spanish selected to be available in.

You can have many master pages but you can only apply a single master page to a target page. You can change the applied master page from the target page at any time by creating a new version of the target page.

1. Click on the Pages icon.
2. Click the **Create New Page** action.
3. Name the page **Master**. This is not a required name. Any name is valid.
4. Select all three of the languages provided. It is best practice to select all available languages for a master page.
5. Choose **Everready** as the Page Template and click **Finish & Edit**.
6. When the page opens in a new tab expand **More Actions** in the Actions panel and toggle on the **Master Page** toggle.

It is this last step of turning on the toggle that makes a page a Master Page. None of the other properties need to be defined for a master page as the other properties should be defined at the target page level. Master Pages are recognizable in page listings because they are assigned a crown icon.

Lets consider some of the types of content that are best suited to placement on a master page. Any content that would be repeated on multiple pages is prime material for use on a master page. For example main navigation menus, logos, footer text, social media icons would be good candidates for content applied via a master page.

In the exercises below we will add a menu and a logo to our master page for use on our target pages.

7. Click in the long panel just below the green background block and choose **Add New Content**.
8. From the Content Type drop down choose **Menu**.
9. Choose the **Class Styled Menu** Content Template.
10. In the Name field enter **Main Nav Menu**.
11. Select each of the available languages.
12. Click **Finish & Edit**.
13. A new tab will open in OrchestraCMS displaying the content editor options for our menu. Click the **Add Menu Item** button in the top left.
14. Enter **Home** in the Label field.
15. Click in the **Page/File** field to link the menu item.

When defining a link in OrchestraCMS, whether it is in a menu or in any other place where you are creating a link, you will see this same dialog. You can set where the link opens when a visitor clicks on it as one of three options:

The Current Window - This will open the linked item in the current browser window.
A New Window - This will open the link in a new tab in the browser.
A Pop Up Window - This will open a detached browser window with minimal controls.

You can also select the type of item being linked to. There are also three choices here:

A page in This CMS - Used when linking to another page in OrchestraCMS.
A file in this CMS - Used to link to a file in the media library, typically for the purpose of downloading the file.
A file or page on another site - Used when you are going to paste in or type a URL manually.

16. From the Open In drop down, choose **The Current Window.**
17. From the Link To drop down, choose **Link to a page in this CMS.**
18. In the Page field, select your Home Page. This field is an autocomplete field so as you start typing the name of the page you want to link to the list of pages will be narrowed down.
19. Once you have selected the Home Page a URL field is displayed because we assigned more than one URL to the Home Page. Make sure you select the **/Home** link.
20. Click **Select**.

21. Click **Save**.
22. Click the **Add Menu Item** button.
23. Enter **Site Map** in the Label field and click **Save**. We do not yet have a Site Map page to link the menu item to so we will take this opportunity to create the page so we can link to it.
24. Click in the **Page/File** field.
25. From the Link To drop down, choose **Link to a page in this CMS.**
26. From the Open In drop down, choose **The Current Window.**
27. Click **New**. This will launch the Create New Page wizard.
28. Select the **Everready** page template.
29. Enter **Site Map** as the page name.
30. Click **Finish**. We do not need to Finish & Edit as we will edit the page later.
31. Click **Select**.
32. Click **Save**.
33. Click the **Add Menu Item** button.
34. Enter **Contact Us** in the Label field.
35. Click in the **Page/File** field.
36. From the Link To drop down, choose **Link to a page in this CMS.**
37. From the Open In drop down, choose **The Current Window.**
38. Click **New**.
39. Select the **EverreadyForm** page template.
40. Enter **Contact Us** as the page name.
41. Click **Finish**.
42. Click **Select**.
43. Click **Save**.
44. Click the **Split View** action. This will allow us to translate the menu items.

Certain types of content have structure. For example, a menu will list the items in a certain order and some items may have sub menu items. The structure of the menu is maintained across translations. This means you would be unable to reorder the menu items in a different language without reordering them in the default language as well.

45. Each menu item is shown as blank in French. The same will hold true for the Spanish translations as well. Open each matching menu item and provide the corresponding French translations from the table below.
46. Set each menu item to point to the same page as the English menu. You will not need to create the pages again as they have already been created. To edit a menu item click the three lines on the right of the menu item and choose **Edit Menu Item**.

The French and Spanish translations are provided in the table below.

47. Mark the French translation as **Translated** and click **Save**.
48. Select **Spanish** from the language drop down.

49. Open each matching menu item and provide the corresponding Spanish translations from the table below.
50. Set each menu item to point to the same page as the English menu.
51. Mark the Spanish translation as **Translated** and click **Save**.

English	French	Spanish
Home Page	Page d'accueil	Página de inicio
Site Map	Plan du site	Mapa del sitio
Contact Us	Nous joindre	Contáctenos

52. Click the **Save** action and close the OrchestraCMS tab for this content item.

On the edit page for your master page notice the Class Styled Menu widget now appears in the panel you added it to. Lets also add a logo to the page as that would be another common content item that would be seen across pages on our site.

53. Click in the very top panel and choose **Add New Content**.
54. Set the properties as listed below and click **Finish & Edit**.
    - Content Type : Media
    - Content Template : Image
    - Name : Logo
    - Description : Logo for Master Page
    - Languages : English, French, Spanish
55. Click the **Select** button. This should open the Browse Media Library dialog.
56. Browse to the **Images** folder and select the Logo.png file.
57. Select the **logo.png** file from the list of files in the Images folder and click **Select**.
58. Click **Split View**.
59. Select **French** from the language drop down.
60. Click **Select** on the French translation and pick the same image from the media library.

You can select different images if needed to provide a different image to be displayed for each translation.

61. Mark the French translation as **Translated** and click **Save**.
62. Select **Spanish** from the language drop down.
63. Click **Select** on the Spanish translation and pick the same image from the media library.
64. Mark the Spanish translation as **Translated** and click **Save**.
65. Save the content and close the OrchestraCMS tab for the logo content.
66. Click **Publish** from the Actions menu on the Master page.
67. Once the publish is complete close the OrchestraCMS tab for the Master page.

68. Click the **Pages** icon and open your Home Page.
69. Expand More Actions and click **Add a Page Template**.
70. From the **Master Page** drop down, choose your master page.
71. Click **Apply.**

The menu and logo you placed on the master page now appear at the top of your Home Page, and the widgets have a crown icon that the Welcome Message content does not have. This icon allows you to differentiate between content that is placed directly on the page and content that is inherited from the master page. The content that is being inherited from the master page cannot be removed from this page but would instead have to be removed from the master page.

72. Click the **Preview** action. Notice that both the menu, logo and the welcome message displayed. Close the Preview tab.

Some content items have an additional menu item in their menu. This is Page Specific Properties. Page Specific Properties are properties for a piece of content that are only relevant to that instance of that content on that page and do not apply to that content if it is used anywhere else. Lets take a look at how page specific properties would be used. We are going to add the menu to the page again however this time we will use a breadcrumb content template. A breadcrumb menu is one you often see on a website that shows you the trail you have taken through the menu to get to your current page. Since this path would be different for each page, even though the menu is the same menu, we would need to configure the menu a little differently for each page, this will need Page Specific Properties.

73. Click in the same panel as the WelcomeMessage content and choose **Add Existing Content**.
74. Use the Search For… box and enter **Menu**.
75. It should find the Menu you created. Not because it is a menu, but because you named it Menu. Click the Name of the menu.
76. This should open the menu content in its own OrchestraCMS tab. Click the **New Version** action.

77. Expand the **Templates** action and click **Add a Template**.
    - Select the Breadcrumb template and click **OK**.
    - Click **Save and Close**.

By adding a template we have given ourselves another way to render this menu on a page. So now it is available to us as a Class Styled Menu, which typically is used to provide accordion menus or fly out menus, and also as a Breadcrumb which is typically used to provide a trail of menu navigation between the root of the site and the page you are currently on.

We already placed the menu on the page as a class styled menu so we are now going to place the same menu on the page, this time using the Breadcrumb template we just added.

78. Close the Menu content tab in OrchestraCMS.
79. With the HomePage tab as the active tab, close the Add Content dialog and click below the Welcome Message content and select Add Existing Content.
80. Search for the menu again.
81. Ensure the Content Template column says Breadcrumb. If it does not, drop it down and select Breadcrumb as the active template.
82. Click the **+** next to the Menu in the Add Content to Page dialog.
83. Close the Add Content to Page dialog.

The page should now have the menu on it inherited from the master page as a Class Styled Menu and also directly on it as a Breadcrumb.

84. You can reorder content in the same panel or move it from one panel to another by drag and drop. Click the textured area on the left of the Breadcrumb template and drag it so it appears above the WelcomeMessage content in the panel.
85. Click **Preview**.

You will not see the Breadcrumb trail displayed. Breadcrumbs must have an active item set in order to be displayed on the page.

86. Close the Preview tab.
87. Click the menu on the Main Nav Menu (Breadcrumb) content and choose **Edit Page-specific Properties**.

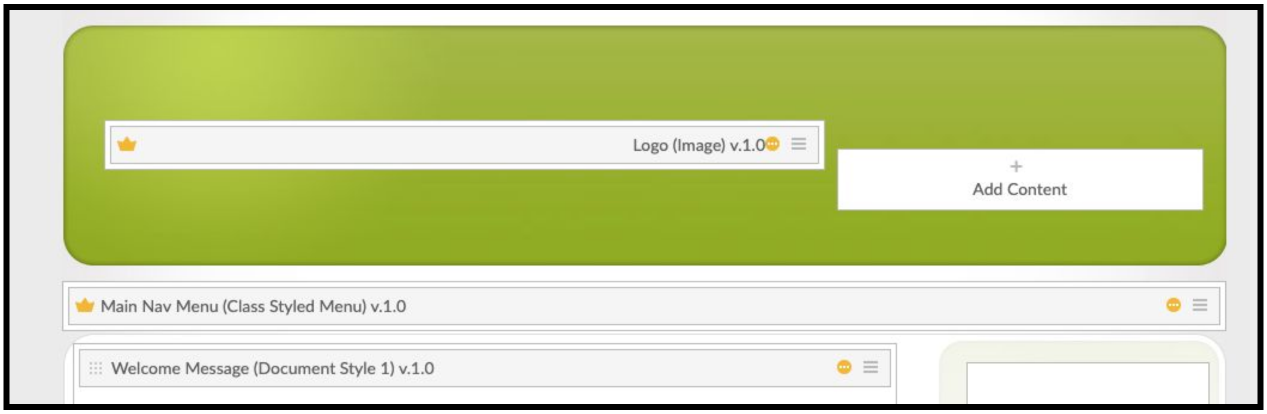
Any settings set in this dialog are applied to this instance of this content only on this page. The page specific properties for menus include the setting Active Item which is used to assign the "active" class to a particular menu item. Active menu items are often highlighted to let you know you are on the page that the menu item links to. It is also used for breadcrumb menus to define the endpoint for the breadcrumb trail. Since this is the Home Page, we are going to set the active menu item as the **Home** option.

88. Click **Open Menu Item Selector**.
89. Select **Home**.
90. Click **Select**.
91. Click **Save**.
92. Click **Preview**.

You should now see the breadcrumb menu above the welcome message. You have successfully set Page Specific Properties on a piece of content.

OrchestraCMS provides in context editing of pages through the use of a Render Mode toggle switch in the Actions panel of the page editor. Users can select the Rendered Mode toggle to see the page rendered as it would appear in preview.

The classic page editor is displayed below.



When an editor selects the Rendered Mode checkbox from the toolbar the page is then rendered for editing in the context of how it would look.

When using rendered mode an editor can double click anywhere on the page and the panels will be displayed. Any content object can be drag and dropped between panels while in rendered mode. Additionally, single clicking on any content object will provide a context menu you can use to open the content for editing, expire or to remove the content from the page.

If you prefer to use the rendered mode for your page editing experience you can set this as your default preference so that you do not have to select rendered mode each time you open a page for editing.

1. From the user icon in the top right corner of OrchestraCMS, select **Customize**.
2. In the Open Page Behaviour section select **Rendered Mode**.
3. Click **Save**.
4. Close the Home Page if you have it open.
5. From the Recent Pages list on the Manage Site tab open the Home Page again.

Notice that the page is now opened in Render Mode instead of the classic editor with the panels. At this point any page you open for editing will open in rendered mode by default.

6. Single click on the text Welcome to my site.
7. Click on the three lines to the right of the content and you should get a menu to remove or edit the content.
8. Double click anywhere on the page and you will see the panels outlined.
9. Single click anywhere on the page and the panels will disappear.
10. Hover over the Welcome to my site text and a directional arrow should appear.
11. Grab hold of the content with your mouse and you should now be able to drag it to any one of the other panels on the page.

The rest of the exercises are designed around the classic page editor so you may want to switch you preference back to Layout Mode. You can do this through the Customize option of the user icon in the top right of OrchestraCMS.

OrchestraCMS will detect the language to use when presenting a page to a site visitor. It will then serve up the translation provided when the page was edited or created to the visitor. If the page or content is not translated into a matching language, it will provide the page in the Default language defined by the OrchestraCMS Administrator. The detection process in order is:

- **Language on the Salesforce user record -** This is only used for logged in users. A good example would be a Salesforce community or an Intranet. This option is of no use on a strictly public site where users do not login.
- **ocmsLang= parameter in the URL -** This is helpful when you are sending URLs out. For example in a marketing campaign where you know the user's preferred language you can append this parameter to the end of the URL you are sending out in your emails. This will force the language when the user clicks the link you sent.
- **apex__ocmsLang cookie set in the visitor's browser -** OrchestraCMS provides a language selector menu. When a visitor selects a language on their first visit it sets a cookie in their browser so that on subsequent visits they will automatically get the language they selected without having to select it again.
- **The browser's configured language**. - If none of the above are used then OrchestraCMS will ask the browser what languages it is configured for and serve up the first one that it has a matching translation for.
- **The site's default language -** If no other matches can be found.

In addition to translating the content that is placed on the pages, OrchestraCMS users can also translate the properties of a page. Best practices for SEO in a multilingual site is to ensure all the page properties are translated so search engines can display the relevant results in the proper language.

1. Click the **Overture** tab in OrchestraCMS.
2. Open the Home Page from the Recent Pages list.
3. Click the **Properties** action.
4. From the pop out panel on the right, click the **Translate Properties** button.
5. On the French translation side, set the properties as listed below.
    - Name : Accueil
    - Title : Mon Site
    - Keywords : page d'accueil, Site, Notre Entreprise
    - Description : Ce est la page d'accueil pour mon site
    - URL Name : accueil
6. From the Language drop down, select **Spanish**.
7. On the Spanish translation side, set the properties as listed below.
    - Name : Bienvenida
    - Title : Mi Sitio
    - Keywords : página de bienvenida, Sitio, Nuestro Negocio
    - Description : Esta es la página de bienvenida para mi sitio
    - URL Name : Bienvenida
8. Click **OK**.
9. Click **Save**.
10. Click **Publish** to publish the page.
11. Click **Yes**.
12. Click the **Live Site** icon. When the new tab opens, add /Home to the URL. The URL currently reads http://*yourdomain*/Home and displays your page in English.
13. Add ?ocmsLang=fr to the end of the URL so it reads: http://*yourdomain*/HomePage?ocmsLang=fr . The french content should now be displayed.

Click on the Page d'accueil link in the menu and make note of the fact that it links to the URL /Home. Since we have assigned additional multilingual URLs to the page we can now select those from within menus and other link interfaces in OrchestraCMS. This should be done so that multilingual links use multilingual URLs.

1. In OrchestraCMS, click the **Content** icon on the Manage Site master tab.
2. Open your **Main Nav Menu** content.
3. Click the New Version action so that we can make changes to the content. Remember, when content or pages are published you must make a new version to make changes.
4. Click the **Split View** action.
5. Click the Edit Menu Item option on the french **Page d'accueil** menu item.
6. **Clear** the value from the Page/File field.
7. Click in the **Page/File** field and select the **Home Page**.
8. The URL field offers the choice of URL to link to when more than one URL exists for the page. From the URL drop down at the bottom, choose the **/accueil** option.
9. Click **Select**.
10. Click **Save**.
11. Click the **Publish** action. This will push the change to the live site.
12. Go back to the live site URL of http://*yourdomain*/Home?ocmsLang=fr and refresh the page.
13. Click the Home menu item and you will see the the URL changes to http://*yourdomain*/accueil?ocmsLang=fr

Although having URLs defined in different languages does not automatically load the URL in that translation when that page is accessed, it does allow you to specify all the links to that page in the relevant language that should use the translated URL.

OrchestraCMS also has a Language Selector content template that can be placed on a page to allow the user to select the language they would like to view the page in. If the Administrator has enabled the option, when a user selects the language a cookie is stored on the user's browser and they will not need to select the language next time they visit. The languages displayed in the menu are dependant on the Translated URLs for the page. This means if you do not translate the URL for a language, that language will not appear in the language selector menu choices. Lets add the language selector now. Since the language selector should probably be on every page of your site it seems like a prime candidate for content on our master page.

1. Click your Master page from the Recent Pages list on the Overture tab.
2. Click **New Version** if you need to.
3. Click in the top right panel and choose **Add New Content**.
4. Set the properties as listed and click **Finish & Edit**.
    - Content Type : Utility
    - Name : Language Menu
    - Description : Allows user to select language
    - Languages : English, French, Spanish
    - Content Template : Language Selector
5. Enter **Select a Language:** in the Language Selector Label field.
6. Click **Save**.
7. Click the **Split View** action.
8. Enter **Sélectionnez une langue:** as the French translation.
9. Mark the content as **Translated**.
10. Click **Save**.
11. Select Spanish from the translation drop down.
12. Enter **Seleccione un idioma:** as the Spanish translation.
13. Mark the content as **Translated**.
14. Click **Save**.
15. Close the Language Menu tab.
16. **Publish** the master page.
17. Click **OK**.
18. Access the Home page on your live site again. You should now see the language selection menu.

Note	You cannot test the language selection menu in Preview in OrchestraCMS. Viewing the pages in different languages in accomplished using the Select Language option on the Preview toolbar.

Using OrchestraCMS Forms

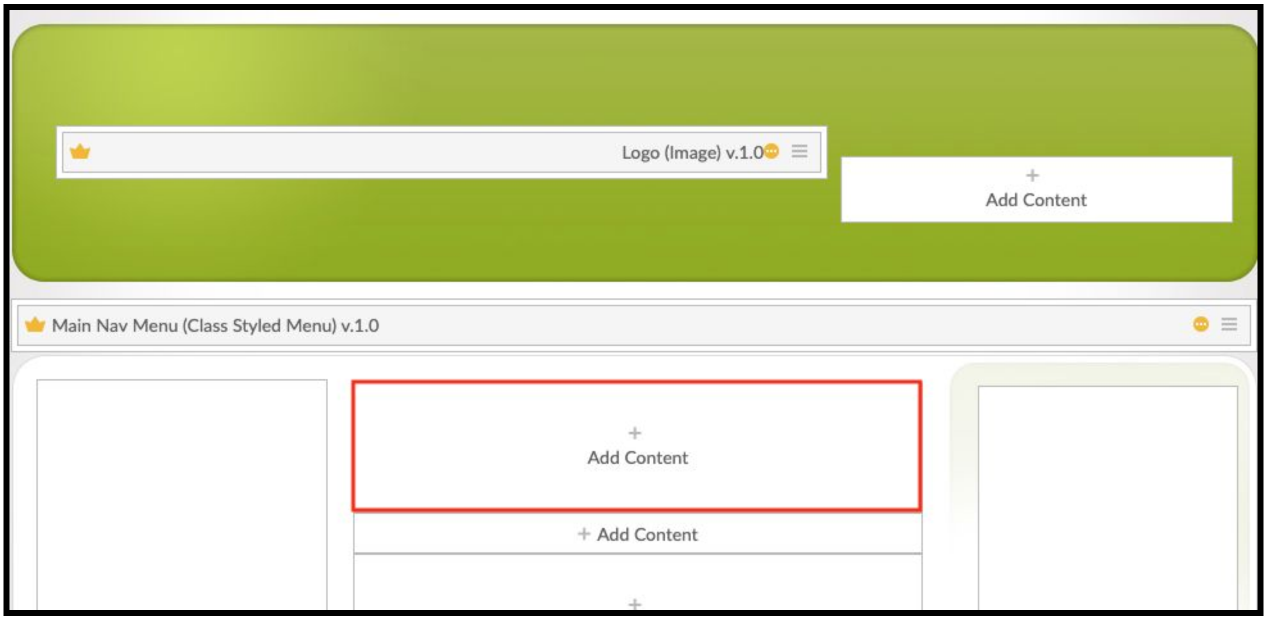
OrchestraCMS forms provide a method of collecting data from site visitors to be stored in Salesforce objects. These forms do not provide all the same functionality as standard HTML forms. Standard HTML forms can be accomplished in other manners. These are specifically designed to tie into your Salesforce org and store the submitted data in Salesforce objects.

Note	OrchestraCMS respects Salesforce security. If fields you are adding to a form do not show up you may need to speak to your Salesforce administrator about ensure field level security is setup correctly for your audience.

1. On the Overture tab, click the Contact Us page. We created this page earlier when we were adding links to our menu.
2. Expand More Actions and click the Add a Page Template action.
3. Select your master page from the Master Page drop down. This will allow the contact us page to inherit our common content from the master page.
4. Click **Apply**.

For our example we will create a form that will create a lead in Salesforce when a user enters data into the Contact Us page. This could then be supported in Salesforce with some business logic to notify staff via email so that someone can then reach out to the new contact. The power of OrchestraCMS forms lies in the business logic of Salesforce. Once the data is submitted by the form and the record is created in Salesforce the full power of the Salesforce platform can then be applied to the processes your organization has around that collected data.

5. Click in the panel highlighted below and choose **Add New Content**. Set the properties as
    - Content Type : Form
    - Name : ContactForm
    - Description : A form for creating a lead
    - Languages : English, French, Spanish

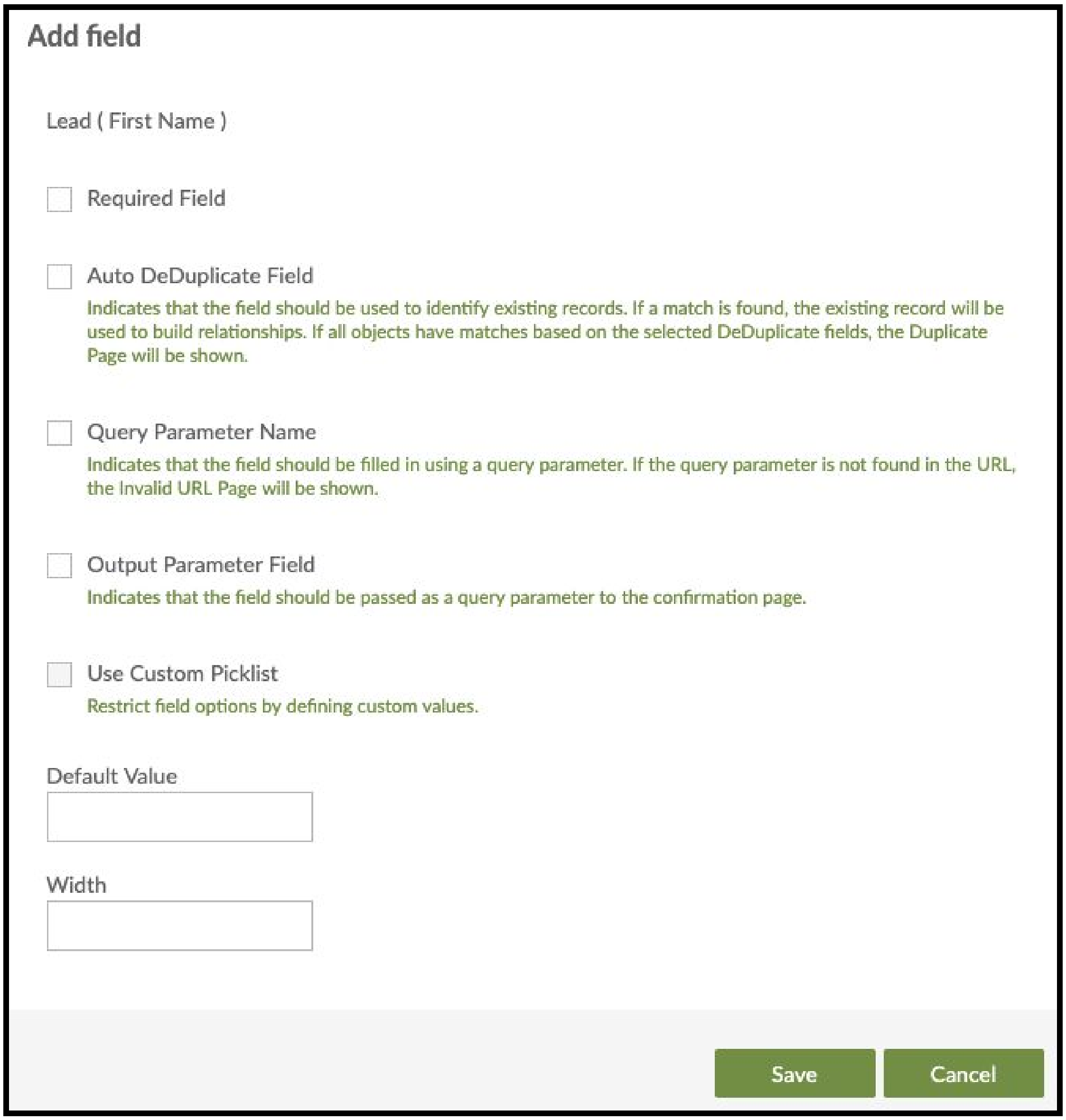


6. Click **Finish & Edit**. The form content should open in a new OrchestraCMS tab.
7. Double click in the top right box of the table provided.
8. From the Select Object drop down, choose the object from Salesforce that you want to save the data the visitor is submitting, into. In this case, please choose the **Lead** object.

Salesforce security is respected here so if your account does not have access to an object in Salesforce, you will not see that object in the list. This is true of your visitors as well. If they do not have permission to the object / fields in Salesforce then they will not see those fields on the form in the website.

For this form we are going to collect five pieces of information: First Name, Last Name, Organization Name, Email Address and Questions/Comments in that order.

9. Click the **Add Field** link next to the **First Name** field in the list. The dialog shown below is displayed.



As each field is added to the form you can configure a few properties of the field. These include:

- **Required** – Will not allow the form to be submitted without having this field filled in. If the field is required in Salesforce then this will already be selected and you cannot unselect it.
- **Auto DeDuplicate Field** – Prevents the record from being written to Salesforce if there is already a record in Salesforce with the same value in that field. For example if you did not want people submitting requests for contact over and over you could set the email field as Auto DeDuplicate and once a record existed with that email address any additional attempt to submit the form again with that email would result in the user being redirected to the page specified in the Duplicate Page field of the form.
- **Query Parameter Name** – Will autopopulate the field with the matching value from any name value pairs in the URL. For example, if the URL used to reach the form were http://yourdomain.com/contactus?fname=Robert , then by putting **fname** in the Query Parameter Field, this link when used to access the form will populate that field on the form with the value **Robert**. This is useful in situations where you are in control of the link the visitor uses to arrive at the form. For example a marketing email. If you already know the visitor's name and email address making them fill it in again when they arrive at the form would not make sense. So you can populate the values in the link you send them so that when they arrive at the form those fields are already filled in.
- **Output Parameter Field** – Will take the value the visitor enters in that field on the form and pass it on to the next page as a name and value pair in the URL. For example, if you set the value of Output Parameter Field as **fname** and the user fills it in on the website as **Robert,** then clicks the submit button on the form, the confirmation page will get the name value pair of fname=Robert passed in. A good example may be that the confirmation page could then have a script that reads the value from the URL and says "Thank you Robert someone will be in touch soon.". If they do not fill in one of the fields that you have marked as an Output Parameter field then they will be redirected to the page specified in the Invalid URL Page field.
- **Use Custom Picklist -** This allows you to predefine a list of values as a drop down for a text field.
- **Default Value** – Filled in if you wish to present the user with a default value that can be replaced or left.
- **Width** – A number to set how many characters wide the field should be.

10. Select **Required** and click **Save**.
11. Double click the next field down on the right.
12. Click the **Add Field** link next to the **Last Name** field in the list.
13. Click **Save**.
14. Double click the next field down on the right.
15. Click the **Add Field** link next to the **Company** field in the list.

16. Click **Save**.
17. Double click the next field down on the right.
18. Click the **Add Field** link next to the **Email** field in the list.
19. Click **Save**.
20. Double click the next field down on the right.
21. Click the **Add Field** link next to the **Description** field in the list.
22. Click **Save**.

Now that all the fields have been added to the form we should label them so that visitors will know what they are supposed to typing into each field.

23. Double click the top field on the left.
24. From the drop down select **Form Elements**.
25. Click the **Add Element** link next to the **Text** field in the list.
26. Enter **First Name:** as the label for the field and click **Save**.
27. Double click the next field down on the left.
28. Click the **Add Element** link next to the **Text** field in the list.
29. Enter **Last Name:** as the label for the field and click **Save**.
30. Double click the next field down on the left.
31. Click the **Add Element** link next to the **Text** field in the list.
32. Enter **Organization Name:** as the label for the field and click **Save**.
33. Double click the next field down on the left.
34. Click the **Add Element** link next to the **Text** field in the list.
35. Enter **Email Address:** as the label for the field and click **Save**.
36. Double click the next field down on the left.
37. Click the **Add Element** link next to the **Text** field in the list.
38. Enter **Questions/Comments:** as the label for the field and click **Save**.
39. Double click the bottom right field in the table.
40. Click the **Add Element** link next to the **Submit Button** field in the list.
41. Set the Button Text to **Submit** and click **Save**.

We have now labelled all the fields so that visitors know what they are supposed to be entering in each field. We have also added a submit button so they can send in the data. In addition to Text and the Submit button, you can also place the following form elements on the page.

- **Reset** - Clear the form
- **Save** - Send the user a link that can be used to come back to the form at a later date without losing their work. The page you select in the Save Form Email Template field will be the page they get sent as an email.
- **reCAPTCHA** - A human verification field is added to the form requiring validation before the form can be submitted.

When a user submits a form typical behaviour is to then have them redirected to a page that says something like "Thank you for your submission…". In OrchestraCMS this is the Confirmation Page.

42. Click in the Confirmation Page field and choose

○ Open In…	:	The Current Window
○ Link To…	:	A Page in this CMS

43. Click the **New** button from the Page field
44. When the New Page wizard comes up enter the details as below and click **Finish**.

○ Name	:	Confirmation
○ Title	:	Confirmed
○ Description	:	Confirmation of contact received
○ Languages	:	English, French, Spanish
○ Page Template	:	Everready
○ Master Page	:	Master

45. You are returned to the form and you can click the **Select** button on the Select Link dialog.

The Confirmation Page is the page on the website the user is taken to after they successfully submit the form.

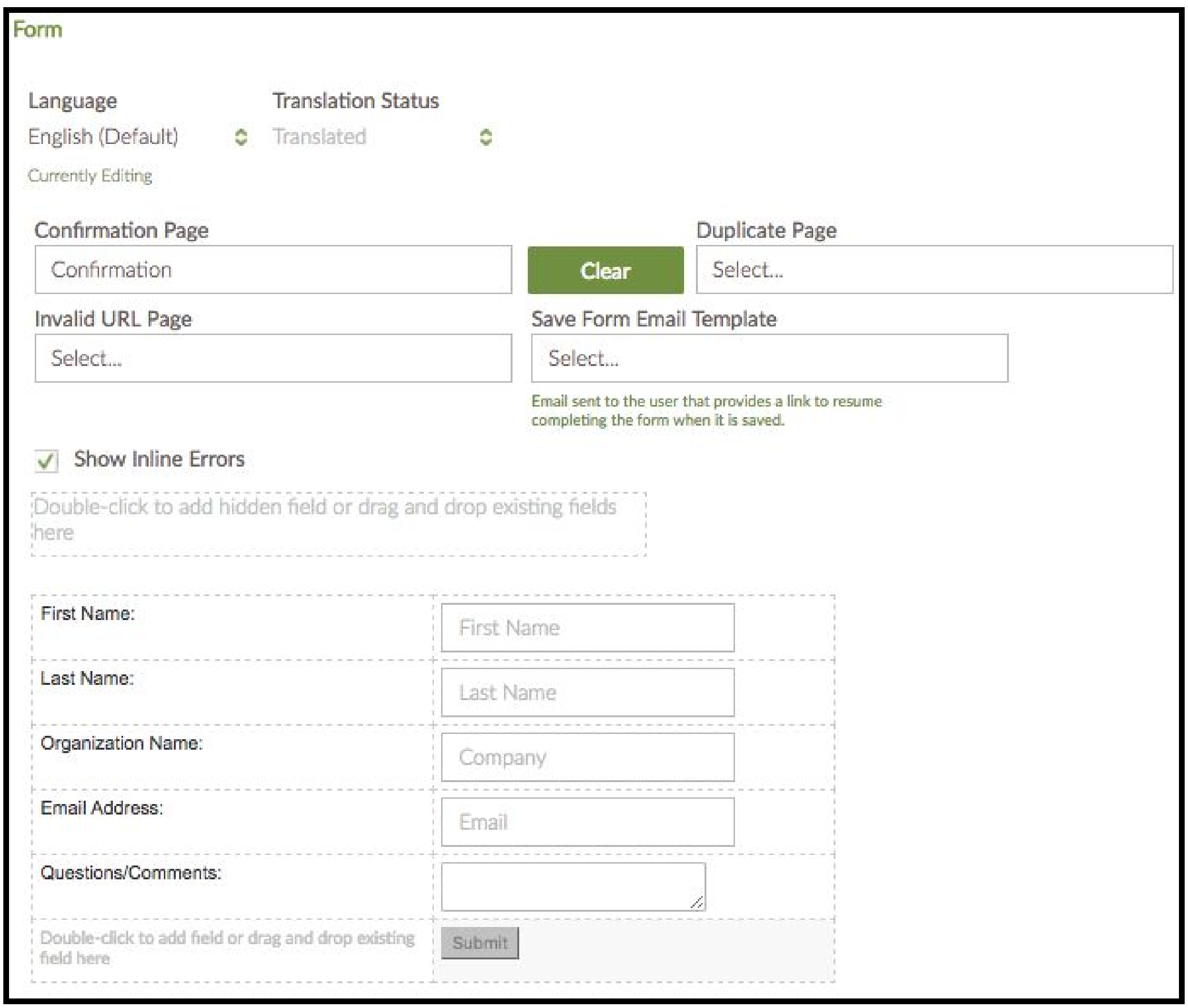
Many organizations want to be able to validate the data entered into the form. For example you have a certain format for telephone numbers or you want to ensure an email address has the @ symbol in it. Keep in mind that the ultimate destination of this data is as a record in Salesforce. Salesforce supports validation rules for submitted data. There is no need to duplicate the work on your web form here. We can expose the Salesforce validation rules to the visitors filling in the form by selecting the **Show Inline Errors** box on the form. This will pass the messages through to the user when they try to submit the form and the data they have entered does not match the Salesforce validation rules.

Now that we have completed the form we should translate it to ensure it is available in all our languages.

46. Click the **Split View** action.
47. Translate each of the blank labels into both French and Spanish as indicated in the chart below and select the same Confirmation Page for each language. Remember to mark each translation as **Translated** and **Save** when you have completed that language.

English	French	Spanish
First Name	Prénom	Nombre
Last Name	Nom de famille	Apellido
Organization Name	Nom de l’organisation	Nombre de Organización
Email Address	Courriel	Correo Electrónico
Questions/Comments	Questions/Commentaires	Preguntas/Comentario
Submit	Soumettre	Enviar

Your form should look like the image below.



48. Click the **Save** action on the form content and then close the OrchestraCMS tab for the form content.
49. You can now click the Preview action on your ContactUs page and see how it will look. It should open in a pop up window.

Previewing content like this in a pop up window will only work if your OrchestraCMS administrator has configured a page for the previewing of this content template. If no page was configured then you will instead get an error message to the effect that your administrator has not configured a page. The best practice is to always preview content on the page you intend to display it on and not from the content editor itself. So in this instance previewing the Contact Us page not the Contact Us content, would provide the best indication of how the form will look on the live site.

50. Open the Confirmation page from the Recent Pages panel of the Overture tab.
51. Click in the largest panel and choose **Add New Content**.
52. Set the Properties as shown below and choose **Finish & Edit**.

    - Content Type : Text
    - Name : Confirmation Message
    - Description : Confirmation message for Contact Us form completion
    - Language : English, French, Spanish
    - Content Template : Document Style 1

53. Enter the following text in the Text editor of the content: **Thank you for contacting us. Your query will be directed and a member of our team will contact you within one business day.**
54. Click the **Split View** action.
55. Add the French and Spanish translations as given below and mark each as **Translated** then save the content.

English	French	Spanish
Thank you for contacting us. Your query will be directed and a member of our team will contact you within one business day.	Merci de nous rejoindre. Votre requête sera acheminée et un membre de notre équipe vous répondra dans la prochaine journée ouvrable.	Gracias por contactar con nosotros . Su consulta será dirigida y un miembro de nuestro equipo se pondrá en contacto con usted el siguiente día hábil.

Save and Close the Confirmation Message content editor tab. Now preview the Confirmation page. Confirm that each translation is displayed by selecting each language from the Preview tab toolbar. Now close the Confirmation page preview and page editor.

OrchestraCMS provides a series of content templates under the content type User Stories that allow users to submit data to be displayed on your website. Users can supply data into an OrchestraCMS form which can then be submitted, approved and listed on the website. The approval template provides a moderator functionality allowing control of what user submitted data appears on your website. In this example we will build a page to allow our customers to submit testimonials about our business.

1. Click **Create New Page** on the Overture icon.
2. When the New Page wizard comes up enter the details as below and click **Finish & Edit**.

    - Name : TestimonialSubmission
    - Title : Submit your Testimonial
    - Description : Customer submitted stories about our service
    - Languages : English
    - Page Template : HarmonyFullWidth

3. Click in the General Content Area on the page and choose **Add New Content**.
4. Set the details as listed and click **Finish & Edit**.

    - Content Type : Form
    - Name : Testimonials Form
    - Description : Form for submission of customer testimonials
    - Language : English

5. Double click in the top right cell of the table.
6. Choose **User Story** from the Select Object drop down.
7. Click **Add Field** next to **Title**.
8. Leave the default values in the Add Field dialog and click **Save**.
9. Double click the next cell down on the right.
10. Click **Add Field** next to **Story**.
11. Leave the default values in the Add Field dialog and click **Save**.
12. Double click in the cell to the left of the Title field.
13. Choose **Form Elements** from the drop down list.
14. Click **Add Element** next to Text.
15. Enter **Title:** in the rich text editor and click **Save**.
16. Double click the cell to the left of the comments box.
17. Click **Add Element** next to Text.

18. Enter **Testimonial:** in the rich text editor and click **Save**.
19. Double click the cell below the Testimonial text.
20. Click **Add Element** next to Submit Button.
21. Enter **Submit Testimonial** as the Button Text.
22. Click **Save**.

This creates the page and form that will allow users to submit their testimonial. Once the testimonial is in the system a moderator will need to approve the testimonials either directly in Salesforce or through a special page on the website. We will create a web page on the site for our moderators to use to approve the submitted items.

1. Click **Create New Page** on the Overture icon.
2. When the New Page wizard comes up enter the details as below and click **Finish & Edit**.

    - Name : Moderators
    - Title : Approve Testimonials
    - Description : Page used to approve or reject customer testimonials
    - Languages : English
    - Page Template : HarmonyFullWidth

3. Click in the General Content Area on the page and choose **Add New Content**.
4. Set the details as listed and click **Finish**.

    - Content Type : User Story
    - Name : Testimonials
    - Description : Customer Submitted Testimonials
    - Language : English
    - Content Template : User Story Approvals

Moderators can login to the website and open this page on the live website to approve or reject user submitted data. Now we need a page to display a list of user submitted testimonials and the details of any testimonial a user clicks on.

1. Click **Create New Page** on the Overture icon.
2. When the New Page wizard comes up enter the details as below and click **Finish & Edit**.

    - Name : Testimonials
    - Title : Customer Testimonials
    - Description : What our customers are saying about us
    - Languages : English
    - Page Template : HarmonyFullWidth

3. Click in the General Content Area and choose **Add Existing Content**.
4. Locate the **Testimonials** content and in the Content Template column choose **Add New Template**.
5. Select the **User Story Summary** template and add the content to the page.
6. Use the Edit Content menu option on the **Testimonials (User Story Summary)** to open it in a new OrchestraCMS tab.
7. Edit the Title field to read **Customer Testimonials**.
8. Click in the **Page** field.
9. Choose Open in **New Window** and **A Page in this CMS**.
10. Click **New**.
11. When the New Page wizard comes up enter the details as below and click **Finish & Edit**.

    - Name : TestimonialDetail
    - Title : Customer Testimonials
    - Description : What our customers are saying about us
    - Languages : English
    - Page Template : HarmonyFullWidth

This will cause the detail of a specific testimonial to be loaded in the Testimonial (User Story Detail) template on this page when someone clicks one of the summaries.

12. Click Select to select the detail page.
13. On the TestimonialDetail page tab click in the General Content Area and choose **Add Existing Content**.
14. Locate the **Testimonials** content and in the Content Template column choose **Add New Template**.
15. Select the **User Story Detail** template and add the content to the page.

To test out the functionality we can submit a testimonial in Preview and work through each of the pages as it would look on the live site.

1. Open the Testimonial Submission page in OrchestraCMS.
2. Click **Preview**.
3. Enter **Great Service** in the Title field.
4. Enter **Never had a better customer service experience** in the Testimonial field.
5. Click **Submit Testimonial**.
6. Open the Moderators page in OrchestraCMS.
7. Click **Preview**.
8. Enter a comment and click **Approve**.
9. Open the Testimonials page in OrchestraCMS.
10. Click **Preview**.
11. Click on the Title of the Testimonial in the list and it should open the testimonial on the detail page.

We have now seen how we can accept user submitted content, approve or reject it for the site and then display a list of that content which can be read by our visitors.

Close all your open tabs.

Using OrchestraCMS Taxonomies

Many sites need to be able to dynamically load content on a page in response to a user selection. For example, consider the online retail experience. You visit the website of an online retailer and they offer you a menu of categories, housewares, electronics, toys, hardware. Selecting any of these categories takes you to a page where you are displayed a series of summaries of items that fit in the selected category. Think of each of those summaries as a piece of content. Clicking any one of those summaries takes you to a page that displays the details of the item you clicked on.

OrchestraCMS provides this functionality through a system called taxonomies. A series of tags, representing the categories is built up into a taxonomy. Those tags can then applied to the individual pieces of content. Essentially assigning a category to the content. One tag can be applied to multiple pieces of content. One piece of content can also have multiple tags applied. Those tags might even come from different taxonomies. A container you place on a page is then populated based on the category selected, either by default or from a menu selection made by the visitor.

For the purposes of the exercise we will develop an Employee Notices page that will display different corporate notices based on the category selected by the visitor.

1. The first step is to create a taxonomy of tags to be applied to the content. Click the **Content** tab in OrchestraCMS.
2. Click the **Add New Content** action.
3. Set the Properties listed below and click **Finish & Edit**.
    - Content Type : Taxonomy
    - Name : Notices
    - Description : Employee Notices
    - Languages : English, French and Spanish
    - Content Template : Taxonomy Menu
4. Click on the three lines to the left of the Notices node and select Translate Category. USe the translations from the table below.
5. Click on the three lines to the left of the Notices node and select **New Category**.
6. In the Add Categories dialog enter each of the following values on a new line. Include the translations for French and Spanish from the table below.

English	French	Spanish
Notices	Les Avis	Avisos
Executive	Cadre supérieur	Ejecutivo
Department Heads	Chefs de département	Jefes de Departamento
Teams Leads	Chefs d'équipe	Equipos ofertas
General Staff	Personnel	Mayor

Note	More values or sub levels can be added at any time if required by creating a new version of the taxonomy content.

7. Expand **More Actions** and click **View All Properties**.
8. At the bottom of the Properties dialog is the Select Detail Page field. This field allows you to specify the page that will hold the Taxonomy Loader content which acts as a container for the dynamically loaded content. Click in the **Select Detail Page** field.
9. Set the Properties as
    - Open In… : The Current Window
    - Link To… : A page in this CMS
10. Click the **New** button for the page field so we can create the page we will use to hold the taxonomy loader.
11. In the New Page wizard set the properties as listed and click **Finish**.
    - Name : Notices
    - Title : Company Updates
    - Description : Notices page for all staff
    - Languages : English, French, Spanish
    - Master Page : Master
    - Page Template : Everready
12. Click the **Select** button.
13. Click **Save**.

Note	In order to apply the tags in a taxonomy to content items the taxonomy must first be published. This also holds true for future added tags, you cannot apply unpublished tags to content.

14. Click the **Publish** action.
15. Click **Yes**.

16. Close the OrchestraCMS tab for your Notices content.
17. On the Manage Site tab click the **Create New Content** action
18. Set the properties listed below and click **Finish & Edit**.
    - Content Type : Article
    - Name : Executive Update
    - Description : New office planned for Tulsa
    - Languages : English

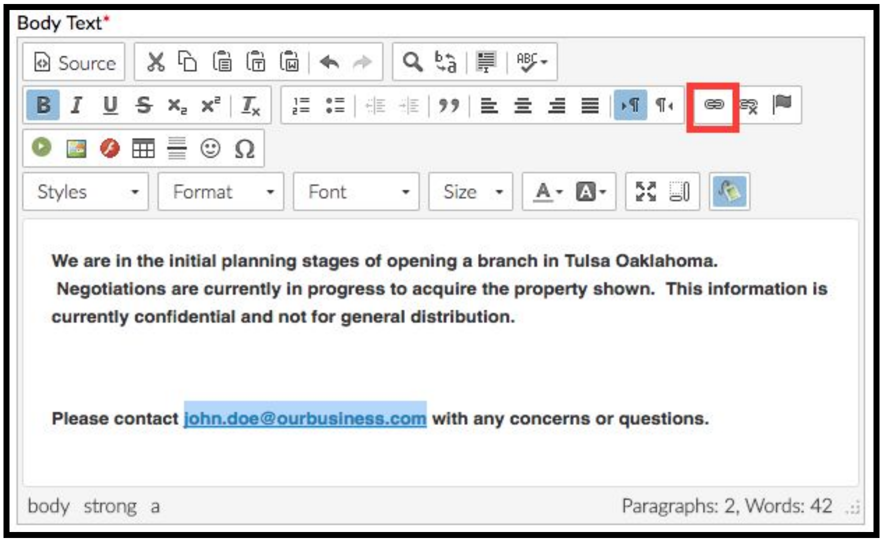
At this point if you wish to continue translating content you can continue providing each language as we have been doing. In the interest of time the exercises will no longer outline the translation steps for each page and piece of content.

Now we need to author some content and assign them categories so they can be dynamically loaded when a visitor selects that category on a page.

Note	In a production situation it is likely these articles would have a specific start date so you could publish the article on Friday even though the announcement was not to be broadcast until Monday. The article would not appear in the dynamic feed until its start date. You would also likely set an expiry date after which the announcement is no longer valid, for example six months later.

19. In the Body Text field enter the text **We are in the initial planning stages of opening a branch in Tulsa Oaklahoma. Negotiations are currently in progress to acquire the property shown. This information is currently confidential and not for general distribution.**

    Please contact john.doe@ourbusiness.com with any concerns or questions.
20. Highlight the john.doe@ourbusiness.com in the text editor and click the link button shown below.



21. Set the properties as:
    - Link Type : Email
    - Email Address : john.doe@ourbusiness.com
    - Message Subject : Tulsa Project
22. In the Article Summary field, enter the text **In the planning phase of opening Tulsa location**.

Note	The Generate Text button takes the Body Text and creates a summary based on that text.

23. For the Large Image field click the **Select** button.
24. Select the Property.png image we uploaded to the Images folder earlier.
25. Once the upload is complete, select the checkbox next to the Property.png image in the list of available files and click **Select**.
26. Expand the **Taxonomy** action and select the **Notices** taxonomy..
27. From the Select Category dialog, browse the tree on the left and highlight the **Executive** branch. Click the **+** sign that shows when you hover over this option. This will tag the article with that category. It should now show on the right side of the dialog. Click **OK**.
28. **Save** the Article content.
29. Expand the Templates action and select the **Content Chatter Feed** template.
30. Once the screen loads click **Save**.
31. Close the OrchestraCMS tab for this content.

We have now authored a piece of content that will be dynamically loaded on a page when a visitor selects the Executive category from a menu. Many organizations have this role for their sites where the sole job of the role is to author content in this fashion and ensure it is tagged properly to be loaded at different points in the site. Since this is a large part of using OrchestraCMS we will repeat the process a few times and author and tag some additional content.

32. On the Content tab, click the **Add New Content** action
33. Set the properties listed below and click **Finish & Edit**.
    - Content Type : Article
    - Name : Flu Shots
    - Description : Flu Shot Announcement
    - Language : English

34. In the Body Text field, enter the text **Announcement to all staff: Health nurses will be running flu shot clinics in all locations during the month of October. Please contact your team lead to register for a timeslot for your flu shot. Canadian staff must bring their health cards to present to the nurse.**

35. Set the Article Summary to read **Flu shot time. Please register.**
36. Expand the Taxonomy **Action** and select **Notices**.
37. From the Select Category dialog browse the tree on the left and highlight the **General Staff** branch. Click the **+** sign that shows when you hover over this option. This will tag the article with that category. It should now show on the right side of the dialog. Click **OK**.
38. **Save** the Article content.
39. Expand the Templates action and select **Content Chatter Feed**.
40. Once the screen loads click **Save**.
41. Close the OrchestraCMS tab for this content.

Now we have an article that has been assigned a different category. We will continue with this and author two more articles. We will assign both of these new these articles the Team Leads category from the taxonomy.

42. On the Content tab click the **Add New Content** action
43. Set the properties listed below:
    - Content Type : Article
    - Name : Employee Options Announcement
    - Description : Employee Options Announcement
    - Language : English

44. Click **Finish & Edit**. The content should open in a new OrchestraCMS tab.
45. In the Body Text field, enter the text **Starting the first week of October employee option packages will be distributed through team leads. An overview of the options plan will be presented via Webinar. Click here to add the details to your calendar. We would like to thank you all for your hard work in bringing this to fruition.**
46. Set the Article Summary to read **Options plans are coming.**
47. Expand the Taxonomy **Action** and select **Notices**.
48. From the Select Category dialog browse the tree on the left and highlight the **Team Leads** branch. Click the **+** sign that shows when you hover over this option. This will tag the article with that category. It should now show on the right side of the dialog. Click **OK**.
49. **Save** the Article content.
50. Expand the Templates action and select **Content Chatter Feed**.
51. Once the screen loads click **Save**.
52. Close the OrchestraCMS tab for this content.

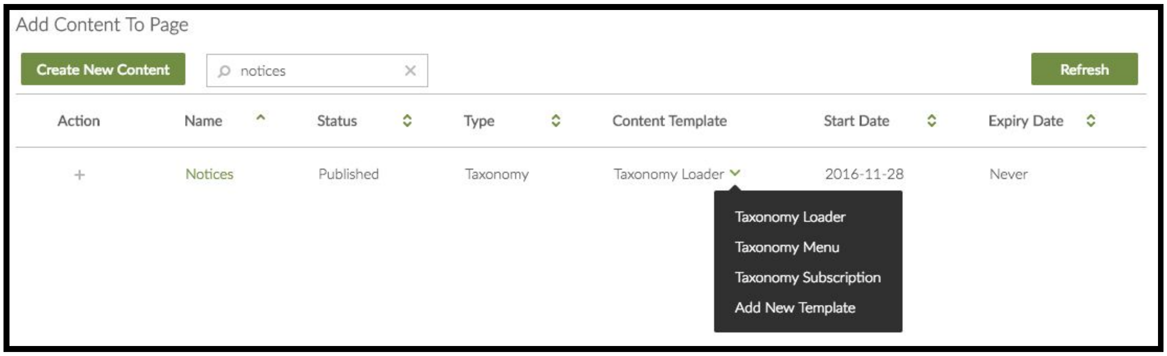
One more to go.

53. On the Manage Content tab, click the **Add New Content** action
54. Set the properties listed below
    - Content Type : Article
    - Name : Scheduling Application Announcement
    - Description : A new scheduling application is now available
    - Language : English
55. Click **Finish & Edit**. The content should open in a new OrchestraCMS tab.
56. In the Body Text field enter the text **A new scheduling is available at http://ourbusiness.com/scheduling. You use your corporate credentials to access the application. Please review the best practices documentation available here http://ourbusiness.com/documentation/bestpractices.pdf.**

    A training session for team leads will be available in October. Please click here to add it to your calendar.
57. Set the Article Summary to read **New scheduling application available.**
58. Expand the Taxonomy **Action** and select **Notices**.
59. From the Select Category dialog browse the tree on the left and highlight the **Team Leads** branch. Click the **+** sign that shows when you hover over this option. This will tag the article with that category. It should now show on the right side of the dialog. Click **OK**.
60. **Save** the Article content.
61. Expand the Templates action and select **Content Chatter Feed**.
62. Once the screen loads click **Save**.

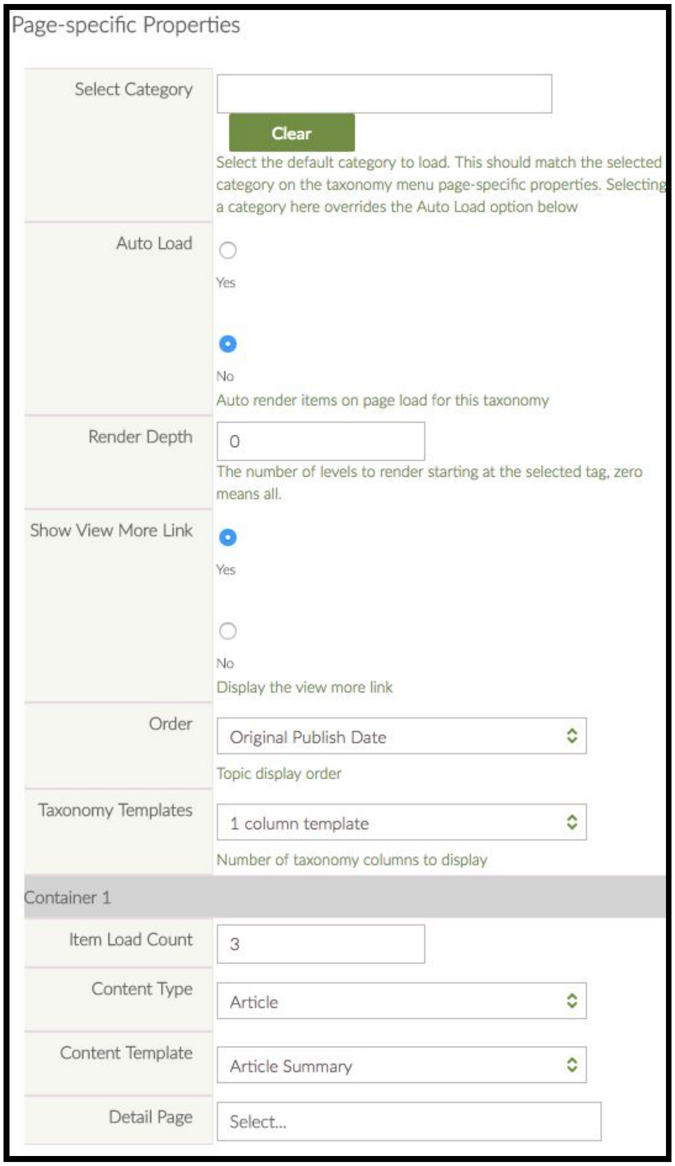
63. Close the OrchestraCMS tab for this content.
64. Open the **Notices** page for editing from the Recent Pages list.

65. Add the **Notices** content to the large panel using the **Add Existing Content** option. When a piece of content has more than one content template assigned, you can choose the template to use when adding it to the page. In this case, choose the **Taxonomy Loader** Content Template as shown in the image.



66. Click the page specific properties icon menu item shown below.

The Taxonomy Loader is the container responsible for displaying the dynamically loaded content. For example if the page is arrived at by the visitor selecting a particularly tagged menu item or link then only content matching that tag will load in the container. The page specific properties for this content allow you to control the behaviour of that container.



If the visitor clicks a link with tags specified on the link to arrive at this page then the taxonomy loader will load the content with those tags assigned. However if the page is arrived at in another fashion without tags the Select Category option can be used to set a default set of tagged content that should load. A mutually exclusive option you can use is to leave the Select Category blank and use the Auto Load option to load all of the content tagged with any of the tags in this taxonomy.

The Render Depth will determine how far down the tree of tags to look for tagged content. For example using the tree shown below

A render depth of 1 when selecting North America would return only content tagged North America and not content tagged Canada, United States, Mexico or any of their sub-categories. A render depth of 2 would return content tagged North America, Canada, United States and Mexico but not any of their sub-categories. A render depth of 0 returns all sub categories so anything tagged North America or below would be shown.

The Item Load Count will determine how many items to load in the taxonomy loader by default. If the number of items matching that category exceeds the item count then the View More link can be enabled to show the next x number of items.

The Order field sets the sort order of the items returned.

- Alphabetical is by the name of the content.
- By Original Publish Date is from newest to oldest based on the first version of the content.
- Publish Start Date is from newest to oldest based on the publish date of the latest version.
- By Priority and Publish Date allows you to display the content from newest to oldest but control the order of specific content items by assigning them priorities. For example, if you had a specific notice that needed to be displayed at the top of the list for a month you could assign it a priority 1 and set the priority to last for 30 days.

The key element to be configured is the Content Type and Content Template to be loaded. For instance you could select Article / Article Summary and the loader will load a list of headlines. Clicking any of the headlines would then take you to the page you set in the Detail Page field where you could then configure the loading of the Article / Article Detail template.

67. Set the properties in the page specific properties as listed:
    - Show View More Link : Yes
    - Order : Original Publish Date
    - Item Load Count : 3
    - Content Type : Article (even if it shows by default, manually select it)
    - Content Template : Article Summary

By configuring the loader to show the Article Summary in the container we are arranging to have a list of notification summaries displayed. Each of these will be presented as a link that will take you to the full article. To do this we need another page that will contain a different type of container on which the full article can load when a visitor clicks one of the summaries.

68. Click in the **Detail Page** field.
69. Click the **New** button.
70. Set the Properties to the same as below, and click **Finish**.
    - Name : DetailPage
    - Title : Notices
    - Description : Page for loading the Article Details
    - Language : English
    - Page Template : HarmonyFullWidth
71. Click the **Select** button.
72. Click the **Save** button.
73. Click the **Save** action on the page to save it and then close the OrchestraCMS tab for the page.
74. From the **Recent Pages** list open DetailPage.
75. Click in the General Content Area panel and choose **Add New Content**.

We need a placeholder on this page to tell OrchestraCMS where to render the article. In OrchestraCMS this placeholder is known as a Content View.

76. Set the properties as listed and click **Finish**.
    - Content Type : Utility
    - Name : Article Placeholder
    - Description : Container for Article Details for employee notices
    - Language : English
    - Content Template : Content View

Note	There are no properties to change for this type of content, so we do NOT need to use Finish & Edit.

77. On the Content View content click the page specific properties arrow.
78. Even if they are showing by default, ensure you actively select Article and Article Detail from the drop downs in the page specific properties, and then click Save.
79. **Save** the page and close the OrchestraCMS tab for the detail page.

What we have done to this point is to:

- Define and create a tagging system for content (taxonomy)
- Create some content items (articles) and tag them with various tags from the taxonomy
- Define a page to load the summary content templates of those articles based on the tag a user selects to get to the page (Notices page)
- Place a container on the page (Taxonomy Loader) to load the summaries relevant to the incoming tag
- Define a page to load the detail content template of the article based on which summary the user clicks on (DetailPage page)
- Place a container (Content View) on the page to load the clicked on article

Now we need to provide the visitor with a link to the page that will carry the tag with it to ensure the loader only loads the tagged content we want displayed. We will do this by adding items to our menu that make use of the taxonomy categories.

80. From the Content tab, open your Main Nav Menu by clicking on it from the list.
81. Click the **New Version** action.
82. In the menu editor, click the **Add Menu Item** button.
83. In the Label field, enter **Notices** and click **Save**. We are not linking this to a page we are just making this item as a parent to hold the sub items that will link to the page.
84. Highlight the **Notices** menu item with a single click and click the **Add Menu Item** button.

Note	Items added when a menu item is already highlighted will be added to the menu as a sub item of the highlighted item.

85. Set the properties to:
    - Label : General Staff
    - Item Type : Link to a page in this CMS
    - Open In : The Current Window
    - Select Category : Notices -> General Staff
    - Page : Notices

86. Click **Select**.
87. Click **Save**.
88. With the **Notices** menu item highlighted, click the **Add Menu Item** button.
89. Set the properties to:
    - Label : Executives
    - Item Type : Link to a page in this CMS
    - Open In : The Current Window
    - Select Category : Notices -> Executive
    - Page : Notices
90. Click **Select**.
91. Click **Save**.
92. With the **Notices** menu item highlighted, click the **Add Menu Item** button.
93. Set the properties to:
    - Label : Team Leads
    - Item Type : Link to a page in this CMS
    - Open In : The Current Window
    - Select Category : Notices -> Team Leads
    - Page : Notices
94. Click **Select**.
95. Click **Save**.
96. With the **Notices** menu item highlighted, click the **Add Menu Item** button.
97. Set the properties to:
    - Label : Department Heads
    - Item Type : Link to a page in this CMS
    - Open In : The Current Window
    - Select Category : Notices -> Department Heads
    - Page : Notices
98. Click **Select**.
99. Click **Save**.
100. **Save** the content and close the OrchestraCMS tab for the menu.
101. On the Overture tab, open the Notices page.
102. Click the **Preview** action. This will display what your home page would look like.
103. From the **Notices** menu, choose the **General Staff** option.
104. You should see the summaries of the Flu Shot articles you wrote.
105. Click the link.

This takes you to the DetailPage and loads that specific article detail into the Content View container on that page.

Note	Using a combination of targeting and/or sharing rules it is possible to ensure content is displayed only for specific users or groups.

OrchestraCMS Search

OrchestraCMS provides basic search functionality out of the box in the form of Search Form and Search Results content templates. The Search Form content template provides a box on your website that visitors can type their query into. The search form is often placed on a master page so it can be seen on multiple pages throughout the site. The main property of the form is a page to load the results of the search on.

The Search Results content is placed on the page that you want to use to display the results. This page is the target of the Search Form content's properties. The Search Results content is a container into which the results get loaded when a search is performed.

OrchestraCMS basic search searches OrchestraCMS pages and content for words on the page or in the content and descriptions and titles from the page and content properties. It returns the results as a list of OrchestraCMS page names as links and the description text for any pages that have descriptions specified.

Note	Content that is not explicitly placed on a page for example, dynamically generated or loaded in a taxonomy, will not be returned in these search results.

If you are going to be creating another page that is very similar to one you already have you can clone the existing page and simply modify the properties of the resulting page.

1. Open your home page from the Overture tab and expand **More Actions**. Select **Clone**. In the resulting dialog, set properties as listed and click **OK**. A new OrchestraCMS tab will open with a clone of your home page.
    - Name field to Results
    - Title field to Search Results
    - URL Name field to Results
2. A few items need to be adjusted. Remove the Welcome Message content by clicking the menu on the right of the content widget and selecting **Remove Content.**
3. Click the **Properties** action.
4. From the pop out panel on the left, click **Translate Properties**.
5. Set the **Description** field to read **Search Results** then click **OK**.
6. Click **Save** on the Properties panel.
7. Click in the largest panel and choose **Add New Content**.

8. Set the properties as listed and click **Finish**.
    - Content Type : Search
    - Name : Search
    - Description : Search Component
    - Language : English
    - Content Template : Basic Results
9. This places a standard content widget on the edit page. This widget represents a container into which search results will be loaded when a user searches. We still need a way for the user to perform the search.
10. Since the search function should be available from all pages the best place to put the search box is on the Master Page.
11. From the Pages icon locate and open your **Master** page.
12. Click the **New Version** action.
13. In the little panel in the top right click and choose **Add Existing Content**.
14. Now we want to add the same search content we created for the Results page but we do not want to add another results container, we want the Search Form content template.
15. Locate your Search content in the list of content, and in the column to the right where it says Basic Results, pull down the arrow and choose **Add New Template**.
16. Choose **Basic Form**.
17. Now with the Basic Form Template showing, click the + next to the name of your search content. This should add it to the panel on the page.
18. Click the edit pencil icon on the Search Form content. This will open the content for editing in a new OrchestraCMS tab.
19. Set the properties for the Search Form as listed and **Save** the content.
    - Basic Result Page : Results
    - Search Button Text : Search
    - Search Label : Search
    - Search Title : Search
20. Close the OrchestraCMS tab for the search content.
21. Click **Publish** and publish your master page.
22. Close your HomePage and open it again. You should now see the blue content widget for the Search Form that we added to the master page.
23. **Preview** your home page and you should now see the search box in the top right corner.

Now that we have a way to search and a place to display the results we need something to search for. Lets create a page of statutory holidays which our business is closed for.

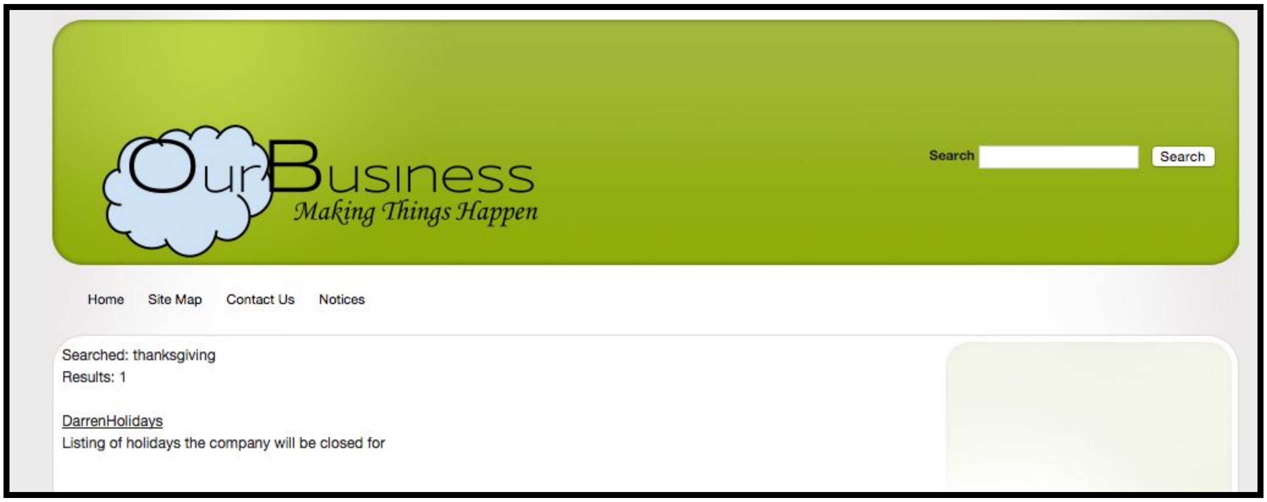
24. Click the **Pages** icon.
25. Click the **Create New Page** action.
26. Set the properties as listed below and click **Finish & Edit**.
    - Name : Holidays
    - Title : Holidays
    - Description : Listing of holidays the company will be closed for
    - Keywords : Holidays, shutdown, closed, vacations
    - Page Template : EverreadyForm
    - Language : English
27. Click in the top panel of the middle column and choose **Add New Content**.
28. Set the properties of the new content as listed below and click **Finish & Edit**.
    - Content Type : Text
    - Name : Holidays
    - Description : Corporate holidays
    - Content Template : Document Style 1
    - Language : English

29. Enter the chart below as a table of 11 rows and 3 columns in the text content.

Holiday	Date	Day of Week
New Year's Day	January 1	Thursday
Family Day	February 16	Monday
Good Friday	April 3	Friday
Victoria Day	May 18	Monday
Canada Day	July 1	Wednesday
Civic Holiday	August 3	Monday
Labour Day	September 7	Monday
Thanksgiving	October 12	Monday
Christmas Day	December 25	Friday
Boxing Day	December 26	Saturday

30. **Save** the content and close the OrchestraCMS tab for the content.
31. Click the **Preview** action on the Holiday page to make sure the content displays properly.
32. Close the Preview Tab.
33. Open your Home Page.
34. Click the **Preview** action.

35. In the Search box enter a search for **Thanksgiving**. The page should be returned in the results as shown.



Not everything on your site should be searchable. For example if you have a link to your privacy policy on each page then someone searching for your privacy policy will find every page on your site, which is not very helpful when they just want the privacy policy. So to avoid this situation OrchestraCMS gives you the option on each piece of content to **Exclude from Search**. Enabling this option in the properties of a piece of content allows OrchestraCMS not to include that content when it is determining what to return for a search. Lets try this out with the Holidays content.

36. Open the Holidays page.
37. Open the Holidays content from the page.
38. Click the Properties action.
39. In the pop out panel on the right, select the **Exclude from Search** checkbox.
40. Click **Save**.
41. Open your Results page from the Recent Pages node list.
42. Click the **Preview** action.
43. Search for **thanksgiving** .

You should get no results back. If you do get the page back again, please wait five minutes and try again, as the indexer may need to reindex still.

44. Once you have seen that the page no longer returns in the results, open your Holidays content, disable the Exclude From Search option in the content's properties and then save the change.
45. Preview the Results page again and try searching for the word **flu.**
46. No results are returned even though we created an article about flu shots. This article is not returned in the results because it is not associated with a page; it is instead loaded dynamically through a taxonomy loader. The basic search will only return pages as results. If a content item is not specifically placed on a page, it is not returned by the basic search.

OrchestraCMS also provides three additional search content types through the OrchestraCMS Extensions package. To enable users to search for Article content items that do not appear on a page you can use the Taxonomy Filtered Content Search to find and filter the articles. We will create an Article Search page to allow our visitors to find articles even if they are dynamically loaded.

1. Click the **Pages** icon.
2. Click the **Create New Page** action.
3. Set the properties as listed below and click **Finish & Edit**.
    - Name : ArticleSearch
    - Title : Find Articles
    - Description : Locate Articles
    - Keywords : Articles, search, find, locate
    - Page Template : HarmonyFullWidth
    - Language : English
4. Click in the General Content Area panel and choose **Add New Content**.
5. Set the properties as listed below and click **Finish & Edit**.
    - Content Type : Taxonomy-filtered Content Search
    - Name : ArticleSearch
    - Description : For searching for articles
    - Language : English
    - Content Template : Search Results Taxonomy-filtered Content
6. Set the content properties as listed and click Save.
   Search Options
    - Content Type : Article
    - Results Content Template : Article Summary

The search can currently only pull back Articles, so we set the Content Type to Article, and the Results Content Template to Article Summary. This will return the articles using the summary information template, although all the fields will be searched.

7. Click in the Search Results Page field. Set the properties as listed below and click the **Select** button.
    - Open in… : The Current Window
    - Link To… : A page in this CMS
    - Page : ArticleSearch

This field directs the search box to load the results on the configured page. This way if you put the search box on a master page or multiple pages, when the user performs the search it will load the specified page with the results list on it. The results page must have the Taxonomy-Filter Content Search Results content on it. We will do this shortly.

8. Click in the **Detail Page** field. Set the properties as listed below and click the **Select** button.
    - Open in… : The Current Window
    - Link To… : A page in this CMS
    - Page : DetailPage

The search results are presented as a series of article links. When you click one of the links it will need to load a page with a Content View content item on it configured to display the Article Detail content template. We previously created the Detail Page when we were building out the taxonomy for loading articles.

Since we only have a single taxonomy, we can leave the Number of taxonomies set to one. We do, however, have four categories in our taxonomy (Executive, Department Heads, Team Leads and General Staff), so we set the Categories per Filter to 4.

The Taxonomy Filter Logic we set to AND so that if the user marks multiple checkboxes we will see results from each of the categories.

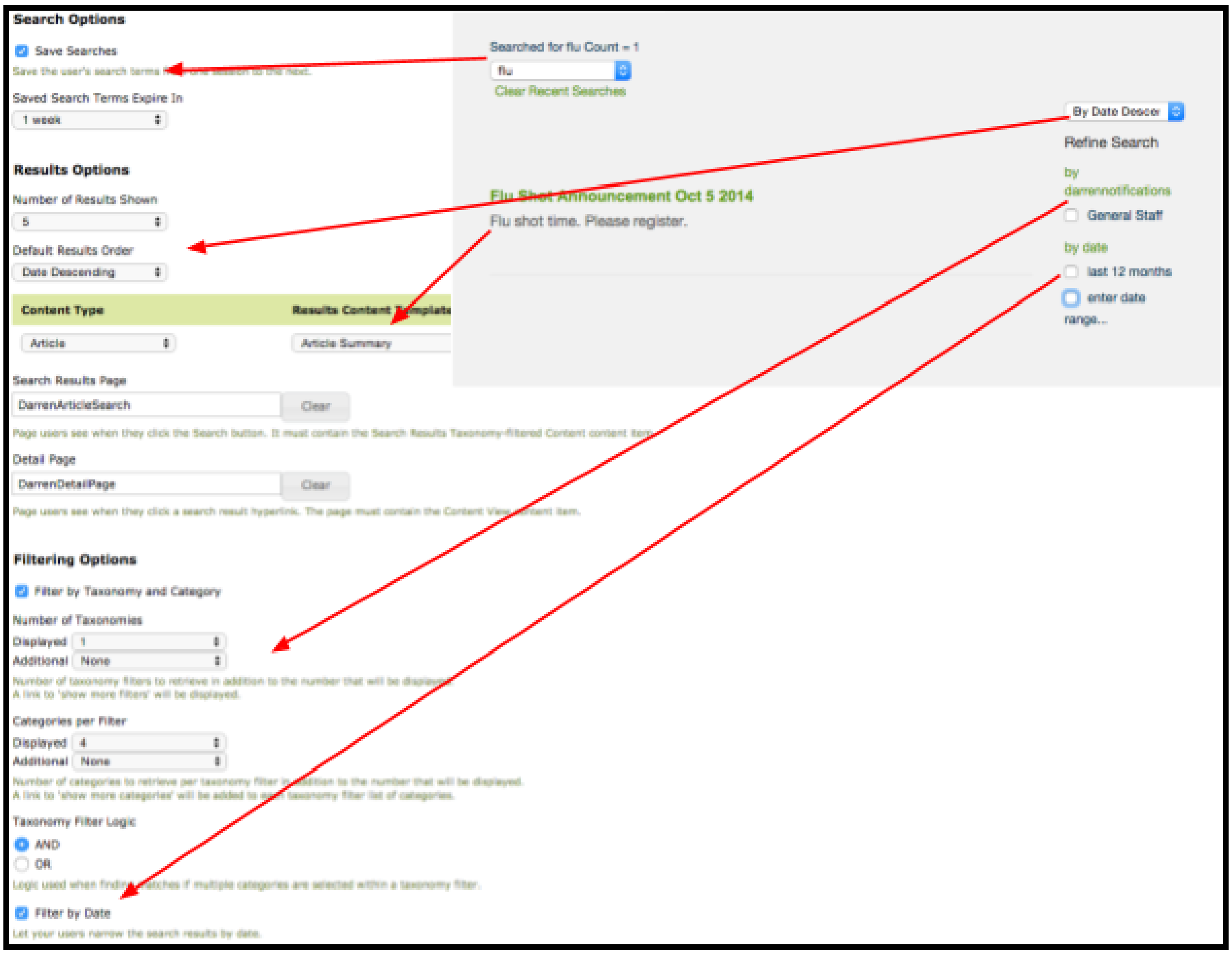
Selecting the Filter by Date checkbox sets it so that the users have the option to narrow the results down by date.

9. Save the content and close the OrchestraCMS tab for the Article Search content.
10. Navigate back to the OrchestraCMS tab for the ArticleSearch page.
11. Click in the Basic Search Form panel and choose **Add Existing Content**.
12. Locate the ArticleSearch content and click the **+** to add the selected content to the page and close the Add Content dialog.

The ArticleSearch content is now on the page twice. Once using the search form content template and once using the search results content template. Each template produces a different view of the content item.

13. Click the **Preview** action.
14. On the preview of the page search for the word **flu**. You will now get the article back as a result. Clicking the link to the article will take you to the DetailPage and load the Article Detail content template for that article.

The image below outlines the relationships between the settings we chose when creating the content and the fields available in the search results.



It is also possible to set up a search that will search through Salesforce CRM Libraries for file names and return files from within Salesforce. For instance, if you had a Salesforce Library that had documentation in it or standard forms you were storing as PDF files, this search could be used to return those files as results.

Since Salesforce security is respected on the results, these types of results can only be exposed to Intranets and Communities. Public websites would be unable to expose this content.

In this example we have a documentation library stored in Salesforce. We will expose this library as searchable by our partners and internal staff.

1. Click the **Pages** icon.
2. Click the **Create New Page** action.
3. Set the properties as listed below and click **Finish & Edit**.
    - Name : Documentation
    - Title : Documentation Library
    - Description : Product Manuals
    - Keywords : Manuals, Documentation, Information
    - Page Template : HarmonyFullWidth
    - Language : English
4. Click in the General Content Area panel and choose **Add New Content**.
5. Set the Properties as listed below and click the **Finish** button.
    - Content Type : Salesforce Content
    - Name : Documentation Library
    - Description : Used for exposing the Documentation Salesforce library
    - Content Template : SF Content Search Results
    - Language : English
6. Click in the Basic Search Form panel and choose **Add New Content**.
7. Set the Properties as listed below and click **Finish & Edit**.
    - Content Type : Search
    - Name : DocumentationSearch
    - Description : Used for searching the Documentation Salesforce library
    - Content Template : Basic Form
    - Language : English
8. On the edit tab for the Documentation Search content click in the **Basic Results Page** field and set the properties as listed below and click the **Select** button.
    - Open In… : The Current Window
    - Link To… : A page in this CMS
    - Page : Documentation
9. Set the remaining properties and listed and **Save** and close the Documentation Search content tab.
    - Search Button Text : Search
    - Search Label : Search
    - Title Text : Search
10. Click the **Preview** action on the Documentation page tab.
11. Search for the term **Manage**.

You should get a list of PDF documents that were uploaded to your documentation library in Salesforce by your administrator. The results are links to the documents. The search searches not just the titles of the documents but the document content as well. Any document type indexable by Salesforce will be searched.

In addition to searching the Salesforce Library and displaying the results you can also display the library contents directly without the need for a search.

12. Close the preview tab of the Documentation page.
13. On the edit tab for the documentation page click in the General Content Area panel and choose **Add Existing Content**.
14. Locate the Documentation Library content in the list and from the **Content Template** column choose **Add New Template**. Choose the **Selectable Library List** template.
15. Click the **+** to add this content template to the panel.
16. Close the Add Content to Page dialog.
17. Click the green pencil edit icon on the Selectable Library List content template widget to open this in a new OrchestraCMS tab and set the properties as listed.
    - Title : Documents
    - Display Library content alphabetically : Selected
    - Display Library Titles : Selected
    - Display Content Descriptions : Deselected
    - Display Salesforce preview link : Selected
    - Number of Library Items to Display : 10
    - Select a Library Label Text : Select Documents
18. Save the content and close the OrchestraCMS tab for the Documentation Library content.
19. **Preview** the documentation page again.
20. Select the Documentation library from the drop down list and it will display the first 10 documents in the documentation library from Salesforce as downloadable links. The Preview links beside each document will open a Salesforce tab/window with the document preview displayed in Salesforce.

There are a few other content templates you can use with the Salesforce Library content to change the display behaviour including

- Library List which can be configured to pick and choose which Salesforce Libraries to display.
- Content List which can be configured to display a manually selected list of documents from chosen libraries.

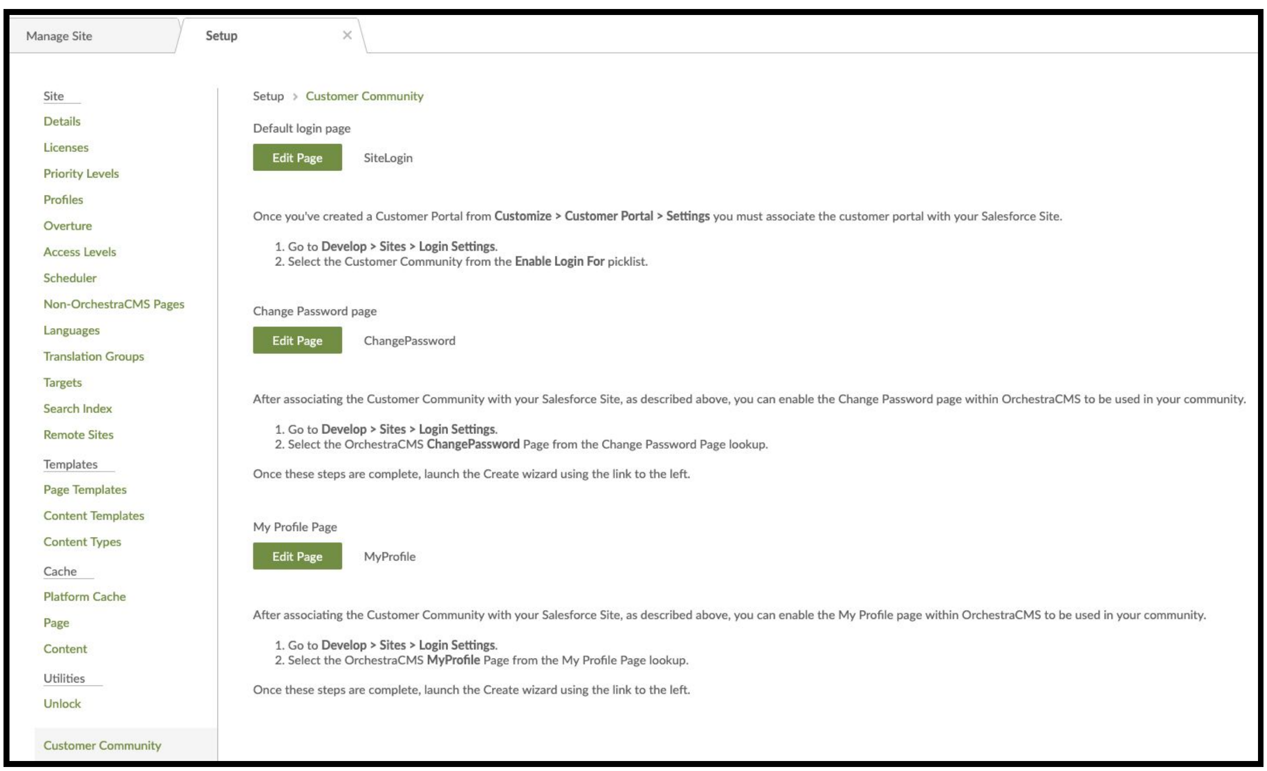
OrchestraCMS also offer a content template for use with a Google Custom Search Engine account that would allow you to have visitor searches submitted to your Google Custom Search Engine and return the results from Google instead of OrchestraCMS.

Authenticating Site Visitors

In order to take advantage of features that allow you to secure pages and content to specific user groups, you need to first enable authentication elements on your site. This is not needed for OrchestraCMS sites that are accessed from inside Salesforce, such as Intranets and is only applicable to Salesforce Communities.

In OrchestraCMS Setup under the Customer Community option, your OrchestraCMS administrator will have defined some default pages to use for authentication functions such as logging in, changing a password and editing user settings. The names of these pages are present in the screenshot below. There can only be one defined Login, Change Password and My Profile Page for each Salesforce site.

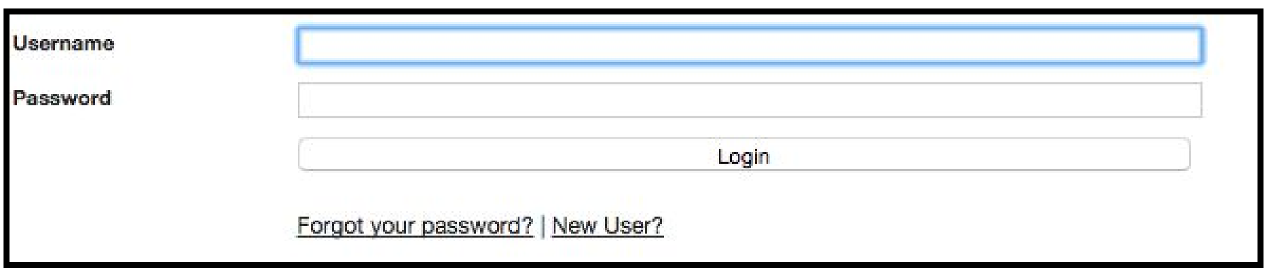
Note	In a production scenario these pages cannot be created from the standard page creation process and must be created from the OrchestraCMS setup interface by an OrchestraCMS Administrator in order to function properly as shown below.



The first step should be to enable users to login by placing a login form on the SiteLogin page. Login forms can be used anywhere on the site however you must have a default login page defined in order to allow users to be redirected there in the event they try to access a restricted page without first logging in. Pages are restricted to logged in users by enabling the **Force Login** property of the page.

1. On the Pages icon in OrchestraCMS open the SiteLogin page for editing.
2. Click in the top panel of the middle column and choose **Add New Content**.
3. Set the Properties listed below and then click **Finish & Edit**.
    - Content Type : Portal
    - Name : LoginForm
    - Description : Login form for authenticating users
    - Content Template : Login Form
    - Language : English

The Login Form will look like the image below when completed. The Default Start Page field will determine the page the user is taken to after logging in. The Forgot Password Page field determines the page the “Forgot your password?” link goes to. The Self Registration Page field is only used if you are going to allow users to register for your site by themselves and will determine where the “New User?” link goes to if used.



4. In the **Default Start Page** field select your home page.
5. Set the properties as
    - Default Start Page : Home Page
    - Username Label : Username
    - Password Label : Password
    - Login Button Text : Login
    - Forgot Your Password Link Text : Forgot Your Password
    - New User Link Text : New User?

6. In the **Forgot Password Page** field click the New button to create a new page instead of selecting an existing page. Set the Properties as listed below and click **Finish**.
    - Name : ForgotPassword
    - Title : Password Reset Request
    - Description : Page for forgotten passwords
    - Force SSL (Advanced Properties) : On
    - Page Template : Everready
    - Language : English
7. Click the **Select** button.
8. After finishing the creation of the forgot password page you should be back at the login form content. From the **Templates** action choose **Add a Template**.
9. Select the **Login Status** template and click **OK**.

The login form content remains open but the configuration options change from the ones for the Login Form template to the ones for the Login Status template. You can switch between the templates a piece of content is using by selecting them from the Templates action.

10. Set the properties as listed.
    - Login Link Text : Login
    - Logout Link Text : Log Off
    - My Profile Label Text : My Profile
11. Click in the **My Profile Page** field and and use the settings below. **Click Select**.
    - Open In… : The Current Window
    - Link To… : A page in the this CMS
    - Page : MyProfile (existing page)
12. Click in the **Login Page** field and use the settings below. **Click Select**.
    - Open In… : The Current Window
    - Link To… : A page in the this CMS
    - Page : SiteLogin (existing page)

The Default Start Page and Forgot Password Page get carried over from the Login Form content properties where we had already filled them in because this is the same content and just a different template.

13. From the **Templates** action choose **Add a Template**.
14. Select the **Change Password Form** template and click **OK**.

The login form content remains open but the configuration options change from the ones for the Login Status template to the ones for the Change Password Form template.

The Default Start Page is already filled in because we had previously defined it for this content on one of the previous templates.

15. Set the properties as listed and **Save** the changes.
    - Title : Change Password
    - Old Password Label : Previous Password
    - New Password Label : New Password
    - Verify New Password Label : Confirm Password
    - Submit Link Text : Submit New Password
16. From the **Templates** action choose **Add a Template**.
17. Select the **Forgot Password Form** and **My Profile** templates and click **OK.**
18. From the **Templates** action choose the **My Profile** template. If it is greyed out that means it is the current template being displayed.
19. Click in the **Change Password Page** field and set the properties as below
    - Open In… : The Current Window
    - Link To… : A page in the this CMS
    - Page : ChangePassword (Existing Page)
20. **Save** the Login Form content and close the OrchestraCMS tab for the content.
21. You should now have the Login page open in edit mode. Close the OrchestraCMS tab for this page.

We need to go through the pages we created during the previous steps and add in the content they will need to perform their functions. For example we now need to add the Change Password form we created to the ChangePassword page.

22. On the Pages icon open the ChangePassword page for editing.

This is the page we set when setting the properties for the My Profile content. We now need to add the Change Password Form to this page.

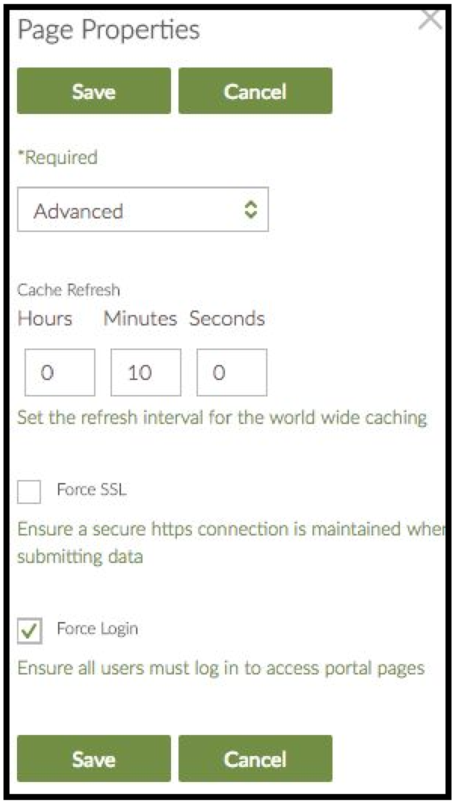
23. Click in the top panel of the middle column and choose **Add Existing Content**. In the list of content find LoginForm, drop down the Content Template field and select Change Password Form. Now use the **+** to add that content to the panel.
24. **Preview** the page to see what it looks like.
25. Close the OrchestraCMS tab for the Change Password page.
26. From the **Pages** icon open the ForgotPassword page.
27. Click in the largest panel and choose **Add Existing Content**.
28. In the list of content find LoginForm, drop down the **Content Template** field and select **Forgot Password Form**. Now use the **+** to add that content to the panel.
29. **Preview** the page to see what it looks like.
30. Close the OrchestraCMS tab for the Forgot Password page.
31. From the **Pages** icon, open the MyProfile page.
32. Click **New Version** if it is published.
33. Click in the top panel of the middle column and choose **Add Existing Content**.

34. In the list of content find LoginForm, drop down the **Content Template** field and select **My Profile**. Now use the **+** to add that content to the panel.
35. **Preview** the page to see what it looks like.
36. Close the OrchestraCMS tab for the My Profile page.

The Login Status component shows the user whether they are logged in or not at any point. This makes the component best suited for being present on the majority of pages within the site. To this end it makes sense to add it to the master page.

37. On the Pages tab highlight the **Master Pages** node and open Master.
38. Click the **New Version** action.
39. In the same panel the menu is in click and choose to **Add Existing Content**.
40. In the list of content find LoginForm, drop down the **Content Template** field and select **Login Status**. Now use the **+** to add that content to the panel.
41. **Publish** the master page.
42. **Preview** the page to see what it looks like.

At this point, when a site visitor tries to access any page that has the Force Login enabled in the page properties (as shown in the screenshot below) it will redirect the user to the login page defined in Setup -> Customer Community -> Default Login Page.



Now that we have enabled the ability for the site to gather credentials and authenticate users, access to the content and pages can be controlled.

Private Sharing

OrchestraCMS supports security on content and pages both within the OrchestraCMS application and on your live site. If you want to restrict access to content and pages within your site to specific groups of visitors or within the application to specific teams you can enable the Private Sharing feature of OrchestraCMS.

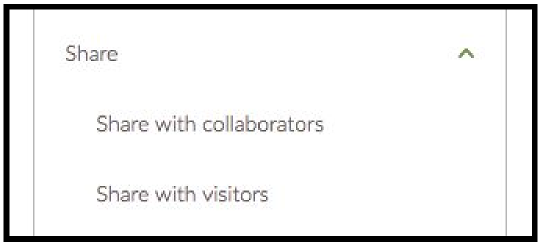
For example if you had both partners and customers accessing your site you could restrict certain pages to partners and certain pages to customers. Or if you wanted only your marketing team to be able to edit Marketing pages and content and your HR team to edit HR pages and content you could also enable this feature.

You only need to complete the Private Sharing section of the exercises if your organization will be using sharing to control access to pages and content on your site or within OrchestraCMS. If this is not part of the scope of your OrchestraCMS implementation, please feel free to skip this section and pick up again at the **Content Targeting** section.

If Private Sharing has been enabled in your Salesforce org by your Salesforce administrator, and OrchestraCMS is licensed for Private Sharing, you can enable security on your pages and content using Sharing. OrchestraCMS security uses Salesforce record sharing behind the scenes to secure your pages and content with Salesforce sharing rules. Once Private Sharing is enabled in Salesforce, you MUST share content and pages in OrchestraCMS in order for visitors or other OrchestraCMS users to see the page or content.

Note	Only the user who created a page or piece of content can see that content, even in OrchestraCMS unless the content is subsequently shared with other users or groups.

Once Sharing is enabled, each page or piece of content a Share action in the Actions panel will be enabled. Expanding the Share action shows two options, Share with collaborators and Share with visitors. You must define both.



The collaborators option encompasses any user of the OrchestraCMS application. For instance, if you create a piece of content and want one of your other users to also be able to edit that content in OrchestraCMS, then you need to share that content with that person in the Collaborators section.

The visitors option encompasses any user who is visiting the site outside of the OrchestraCMS application. One special consideration is that all pages should be shared with the Site Guest User. This does not mean the site guest user will be able to access the page. If the Force Login is checked, the visitor will still be forced to authenticate prior to being able to access the page. It means unauthenticated users can see the page if the Force Login is not enabled.

Note	Users defined as Salesforce System Administrators or who have the Modify All Data and View All Data Salesforce permissions will be able to see content and pages regardless of what the sharing rules are set to.

The first thing we need to do to proceed is to enable the sharing in Salesforce. This step would normally be performed by a Salesforce administrator.

1. From within OrchestraCMS, drop down the user menu in the top right corner with your username and choose **Back To Salesforce**. This should open a new browser window or tab with Salesforce displayed.
2. In Salesforce, where your username shows in the top right corner, choose **Setup**.
3. From the menu on the left navigate to **Administer -> Security Controls -> Sharing Settings**.
4. Click the **Edit** button.

5. Find each of the objects listed below and choose **Private** from the drop down list in the **Default Internal Access** column.
    - Access Level Rule
    - Content
    - Content Layout Instance
    - License Profile Sharing Restriction
    - Page
6. Click **Save**.

You should get an email at your configured email address with a notice that the Processing has been completed. This happens as the records are processed to ensure all sharing is properly applied.

The next few steps would typically be completed by your OrchestraCMS Administrator.

7. In OrchestraCMS click the gear icon in the top right to access **Setup**.
8. Click the **Access Levels** option in the menu on the left.
9. If there is a button to Activate the functionality please click it now. If the Activate button is not present you can close the Setup tab.

Once Sharing is enabled, all pages and content will now have a Share action in the Actions panel. This action is used to grant access to the pages and content to both visitors and other users of the OrchestraCMS application. Careful consideration needs to be given to who should be able to see and edit this content. You will need to work with your Salesforce Administrator to ensure that users are grouped appropriately in Salesforce public groups in order to make administration of your sharing as simple as possible. There are some special groups and users we should mention at this point.

The Site Guest User account is used for sharing content with any anonymous user who visits your site. So anything a visitor should be able to see before they log in needs to be shared with the Site Guest User as a visitor share.

The All Internal Users group encompasses everyone who has a Salesforce licensed account in your Salesforce Organization. Usually this encompasses all your internal employees. This group is used as a visitor share when everyone in your company needs to see something when the log into the site. Or as a collaborator share when everyone in OrchestraCMS needs to be able to edit something.

The All Customer Portal Users and All Partner Portal Users groups are used in Visitor shares when something needs to be viewed by all of your external partners or customers once they have logged into the site.

Any requirements that do not fall into one of the above categories are usually addressed by sharing with a specific Salesforce public group containing the people who should be able to see or edit the page or content.

For our purposes we will share the login page with the guest user since no one is logged in when they use the login page.

10. From the **Pages** icon open the SiteLogin page.
11. Expand the **Share** action and choose the **Share with visitors** option.
12. Click **Add Visitors**.
13. From the **Search** drop down choose **Users**.
14. Search for **site** and click Find.
15. Select the **User: OpusMusicCommunity Site Guest User** user and click the **Add** button.
16. Click the **Save** button at the bottom of the Add Visitors dialog.
17. Click **Close**.

That covers visitors who are not logged in. To allow other users to edit this page in OrchestraCMS we need to add them as collaborators. You can be selective about who can perform this function but we will add the All Internal Users here to allow all other OrchestraCMS editors to edit this page. If you do not share the page with collaborators only the person who created the page will be able to edit it properly in OrchestraCMS.

18. Expand the **Share** action and select the **With Collaborators** option.
19. Click **Add collaborators**.
20. Locate and highlight the **All Internal Users** public group and click the **Add** button.
21. Click the **Save** button.
22. Click the **Close** button.

We have shared the page allowing visitors to the site to see the login page. They will not however see the form for entering their username and password unless we share the content as well. Content does not inherit the sharing from the page that it is one so it needs to be shared individually. The advantage to this approach is that you can place multiple pieces of content on a page and visitors will only see the content that has been shared with them.

We will now share the Login Form content with the visitors so they can see the fields needed to login.

23. Select **Edit Content** from the menu on the LoginForm content widget on the page. This should open it in a new OrchestraCMS tab.
24. Click New Version if the content is published.
25. Expand the **Share** action and choose the **With Visitors** option.
26. Click the **Add visitor** button.
27. Select each of the content templates listed. This will ensure that no matter what template is used to display this content that these visitors will be able to see the content.
28. From the **Search** drop down choose **Users**.
29. Search for **site** and click Find.
30. Select the **User: OpusMusicCommunity Site Guest User** user and click the **Add** button.
31. Click the **Save** button at the bottom of the Add Visitors dialog.
32. Click **Close**.

To allow other users to edit this content we need to add them as collaborators. You can be selective about who can perform this function but we will add the All Internal Users here to allow all other OrchestraCMS editors to edit this content.

33. Expand the **Share** action and select the **Share with collaborators** option.
34. Click the **Add Collaborators** button.
35. Locate and highlight the **All Internal Users** public group and click the **Add** button. This will grant access to this content to all users of OrchestraCMS.

Note	In a production environment you would be more likely to pick a specific group of OrchestraCMS editors/publishers/approvers.

36. Click the **Save** button.
37. Click the **Close** button.

Since some of the content would be inherited from the master page you would also need to share the master page and all the content on the master page. We will do that now.

38. On the Pages icon locate your **Master** page and open it for editing (look for the crown icon).
39. Click the **New Version** action.
40. Expand the **Share** action and choose the **Share with visitors** option.
41. Click the **Add Visitors** button.
42. From the **Search** drop down choose **Users**.
43. Search for **site** and click **Find**.
44. Select the **User: OpusMusicCommunity Site Guest User** user and click the **Add** button.
45. Click the **Save** button at the bottom of the Add Visitors dialog.
46. Click **Close**.
47. Expand the **Share** action and select the **With Collaborators** option.
48. Click the **Add collaborators** action.
49. Locate and highlight the **All Internal Users** public group and click the **Add** button.
50. Click the **Save** button.
51. Click the **Close** button.
52. You will need to repeat this process for all the content items on this page except the Login Status which was already shared when we shared the Login Form. Ensure the Site Guest user is added as a Visitor to each content and the All Internal Users is added as a Collaborator to each content item.   Do NOT share the menu. We will cover this separately below.

Security for menus is different in that each menu item can be secured individually or the sharing applied to the menu can be applied to all the items in the menu as well. When sharing out the menu the option “Apply to all children” can be checked as seen in the screenshot below to ensure that that sharing rule is applied to all the nodes in the menu.

For the purposes of this exercise we are NOT going to checkmark the Apply to all children checkbox.

1. From the OrchestraCMS tab for your master page, click the Edit item icon for your menu. It should open in a new OrchestraCMS tab.
2. Click the **New Version** action.
3. Expand the **Share** action and choose **With Visitors**.
4. Click **Add Visitor**.
5. Select the **Class Styled Menu** template.
6. Choose the **All Internal Users** public group and click **Add**.
7. Uncheck the **Apply to all children** checkbox and click **Save**.
8. Click **Close**.

This has shared the menu with all users who are logged in with Salesforce accounts. The individual menu items however still need to be shared since we turned off the Apply to all Children. If we had left on the Apply to all children then that would have been the final step.

9. Click the Edit icon indicated below on the Home menu option.

10. Select **Manage Sharing**.
11. Click the **Add Visitors** button.
12. Choose **All Internal Users** and click **Add**.
13. From the Search drop down choose Users.
14. Search for **site** .
15. Highlight the **OpusMusicCommunity site guest user** and click **Add**.
16. Click **Save** in the bottom right of the dialog.
17. Click **Done**.
18. Repeat steps 9 through 17 for the Site Map, Contact Us, Notices and General Staff.

This will share each of those menu items with all anonymous and logged in users. The Executives menu option should however only be available to Executives. So we want to set different access on this menu item.

19. Click the Edit icon for the **Executive Notices** menu item.
20. Select **Manage Sharing**.
21. Click the **Add Visitors** button.
22. Select the **Executive** public group and click **Add**.
23. Click **Save** in the lower right corner of the dialog.
24. Click **Done**.

The same process should be repeated for the Team Leads and Department Heads items so they can only be seen by their respective groups.

25. Click the Edit icon for the **Team Leads** menu item.
26. Select **Manage Sharing**.
27. Click the **Add Visitors** button.
28. Select the **Team Leads** public group and click **Add**.
29. Click **Save** in the lower right corner of the dialog.
30. Click **Done**.
31. Click the Edit icon for the **Department Heads** menu item.
32. Select **Manage Sharing**.
33. Click the **Add Visitors** button.
34. Select the **Department Heads** public group and click **Add**.
35. Click **Save** in the lower right corner of the dialog.
36. Click **Done**.

Sharing does not have to be done page by page or content by content. OrchestraCMS supports bulk actions that allow you to share many items at one time. Lets take a look at how this would work.

1. Click on the **Content** icon.
2. Select the checkboxes next to a few pieces of unpublished content.
3. Expand the **Share** action.
4. Click **Share with visitors**. You will get a summary of the items you are sharing.
5. Click **Share**.

You can now add the shares you want to all the selected content at once. The same process can be done with pages. If there are existing shares on any of the items those shares will remain untouched. You cannot currently remove shares in a bulk fashion like this, only add shares. We will not share these items out at this time. Click **Cancel**.

For the remainder of the exercises when publishing a page or content to see it on the live site you would need to share the content with Visitors and add the Site Guest User to the visitors share. In order to avoid these extra steps we can disable the sharing in Salesforce at this time.

1. From within OrchestraCMS, drop down the user menu in the top right corner with your username and choose **Back To Salesforce**. This should open a new browser window or tab with Salesforce displayed.
2. In Salesforce, where your username shows in the top right corner, choose **Setup**.
3. From the menu on the left navigate to **Administer -> Security Controls -> Sharing Settings**.
4. Click the **Edit** button.
5. Find each of the objects listed below and choose **Public Read/Write** from the drop down list in the **Default Internal Access** column.
    - Access Level Rule
    - Content
    - Content Layout Instance
    - License Profile Sharing Restriction
    - Page
6. Click **Save**.

You should get an email at your configured email address with a notice that the Processing has been completed. This happens as the records are processed to ensure all sharing is properly removed. Once you get the email you can refresh the browser in OrchestraCMS to disable the sharing options.

Since sharing is uses Salesforce record sharing your Salesforce administrator can set up Sharing Rules in Salesforce if you want to share things automatically based on criteria. For example if SiteA should have items locked down but SiteB should have everything shared with everyone. In this situation your Salesforce administrator would need to implement sharing rules in Salesforce to accommodate for this.

Content Targeting

Sharing is a security feature predicated on specific users or groups to determine who should see a page or piece of content. Once sharing is enabled no one can see anything they did not specifically create unless the item is shared with them.

OrchestraCMS targeting works in the reverse of sharing in that everything is visible to everyone and until you start applying targets to content. Once you apply a target to a piece of content that content is only visible to people for which the target criteria is valid.

OrchestraCMS targeting uses criteria about a user to determine if a page or content should be displayed to a user. A target uses a rule to match a defined value against a field on the Salesforce record for a user to determine if the content should be displayed. For example, if the Salesforce user records have a Department, field targets could be created, saying:

Department = IT
Department = Sales
Department = Research Development

When a visitor whose Salesforce record has the department field set to IT visits the page, they would see content items with the IT target applied. Users whose record had the department field set to Sales or Research Development would not.

For these exercises two targets, Executive and DepartmentHeads have already been created based on the Department field of the Salesforce user records. The Department field of your user record has been set to Executive. We will apply these targets to two content items on a page to observe the result. For our first step we will create some pages to link to. One page will be specific to executives and the other specific to team leads. Hypothetically each of these pages would contain tools useful to their specific audience. We will not populate these pages with the tools as this is not the goal of this exercise. Once the pages are completed we will link to each of these pages from the Home page and then we will use targets to ensure that the links are only visible to the proper target audience.

1. Open the Pages icon in OrchestraCMS.

2. Click the **Create New Page** action and set the properties as shown below and click **Finish**.
    - Name : ExecutiveLanding
    - Title : Executive Dashboard
    - Description : Home page for executive management tools
    - Force Login : Enabled
    - Master Page : Master
    - Page Template : Everready
    - Language : English
3. Click the **Create New Page** action and set the properties as shown below and click **Finish**.
    - Name : TeamLeadLanding
    - Title : Team Lead Dashboard
    - Description : Home page for Team Lead management tools
    - Force Login : Enabled
    - Master Page : Master
    - Page Template : Everready
    - Language : English

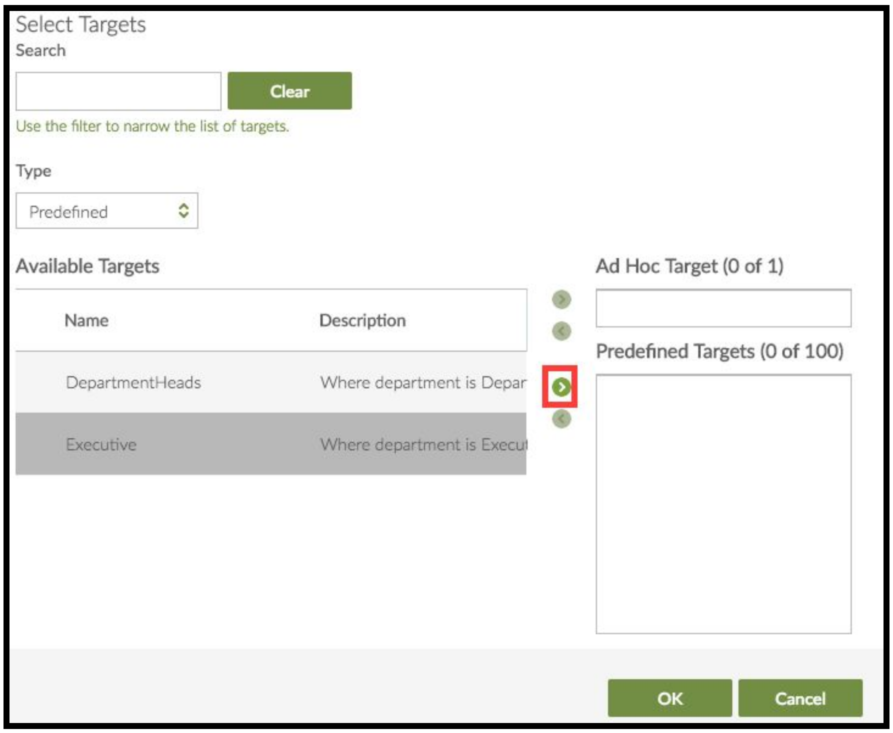
Now that we have created the pages to link to lets create the links and place them on the home page.

4. Open the Home Page from the Overture tab.
5. Click in the right hand panel down the side of the page and choose **Add New Content**.
6. Set the properties as listed and then click **Finish & Edit**.
    - Content Type : Text
    - Content Template : Document Style 1
    - Name : ExecutiveLandingLink
    - Description : Link to the executive Landing Page
    - Language : English
7. Enter the Text **Executive Tools**.
8. Highlight the text and link it to the **ExecutiveLanding** page in OrchestraCMS.
9. **Save** the content. Leave it open as we will come back to it.
10. Click in the right hand panel down the side of the Home Page again and choose **Add New Content**.
11. Set the properties to and then click **Finish & Edit**.
    - Content Type : Text
    - Content Template : Document Style 1
    - Name : TeamLeadLandingLink
    - Description : Link to the Team Lead Landing Page
    - Language : English
12. Enter the Text **Team Lead Tools**.

13. Highlight the text and link it to the **TeamLeadLanding** page in OrchestraCMS.
14. **Save** the content. Leave it open as we will come back to it.
15. Preview the Home Page.

At this point you should see both of the links you saved on the right hand side of the page. This is not the goal. The links should only be visible to users who should see them. Lets apply the targets to the content and see what happens.

16. In the ExecutiveLandingLink content tab expand More Actions click the **View All Properties** action.
17. Click the Targets field.
18. Add the **Executive** target as shown below and click **OK**.



19. Click **Save** on the properties.
20. In the TeamLeadLandingLink content tab expand More Actions click the **View All Properties** action.
21. Click the Targets field.
22. Add the **DepartmentHeads** target and click **OK**.
23. Click **Save** on the properties.
24. Click the **Preview** action on the Home Page now.

You will only see the Executive Tools link. You will not see the Team Lead Tools link even though it is still on the page. This is the result of the targets you applied to the content. Since your user record in Salesforce has the department field set to Executive, you will only see untargeted content and content that has a target applied where the criteria of the target matches your user record in Salesforce. If you were to modify your user record in Salesforce and change the Department field to TeamLead then you would no longer see the Executive Tools link and would instead see the Team Lead Tools link.

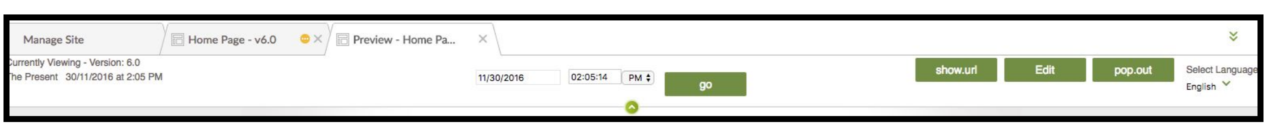
The purpose of OrchestraCMS is to enable you to make changes to the content of your website. You do not want those changes going live the moment you make them. Most often you want to review the changes or have your team review the changes prior to making them live. OrchestraCMS allows you to preview your changes prior to making them live. There are several ways to preview content.

You can preview content in context on a page.

1. Open your Home Page and click the **Preview** action. A new tab will open in OrchestraCMS showing you what the page will look like with the latest version of the content that exists on it published or not.
2. This will display the Preview options panel, as a green arrow at the top of the preview panel and you can expand it to display some options as shown below.
    - The **Date/Time** link allows you to select a date/time to show the preview of so that if you need to see how the page looked at a point in the past, you can.

Note	In order to support this feature OrchestraCMS does not allow you to delete pages or content that were ever published at any point in the past.

    - **Select language** provides all the languages the page is translated in and allows you to preview each of them.
    - **Show URL** (if present) will open a dialog giving you the Preview URL that can be copied and emailed to other users allowing them to see the page in a full window preview with no OrchestraCMS controls displayed. This feature is often used when third parties need to sign off on approvals, for example a regulatory agency.
    - The **Edit** button displays the previewed page in Edit mode.
    - The **Pop-out** button opens the preview in a new browser window.



If a particular content template has been assigned a preview page by your administrator you can click the Preview action on a piece of content which will then open in a pop up window to show you what that content will look like by itself before applying it to a page. This is typically not done.

3. From the Content tab, open your ContactForm form and click the **Preview** action. The form should open in a new window displaying how it would look.

If the page assigned for Preview has more assigned language than the content or if the content is not translated into all the languages assigned then a warning message will be displayed to inform you of this.

4. The Full Preview button at the top of OrchestraCMS is used to open a new tab displaying the root of the site which is the page listed at the top of the Site Map node on the Pages tab. From this tab you can navigate through the site including unpublished pages and content. Ensure your Home Page is dragged to the Site Map node. Once that is done. Click the **Full Preview** icon now.

The links and menu options all work to navigate you through this preview of the site displaying all the latest content and pages published or unpublished. Take a moment to navigate through some of the links.

In the Actions panel of each page is a toggle to **Show In Preview**. If this option is enabled for that page then that version of the page is not displayed when previewing the page.

5. Open your home page.
6. Create a **New Version**.
7. Click the **Preview** action and make note of what you see.
8. Close the Preview tab.
9. Expand **More Actions** and toggle the **Show In Preview**.
10. Click the **Preview** action. You should actually get your page not found page or an error because this page is now not available to preview.
11. Close the Preview tab.
12. Expand **More Actions** and toggle the **Show In Preview**.

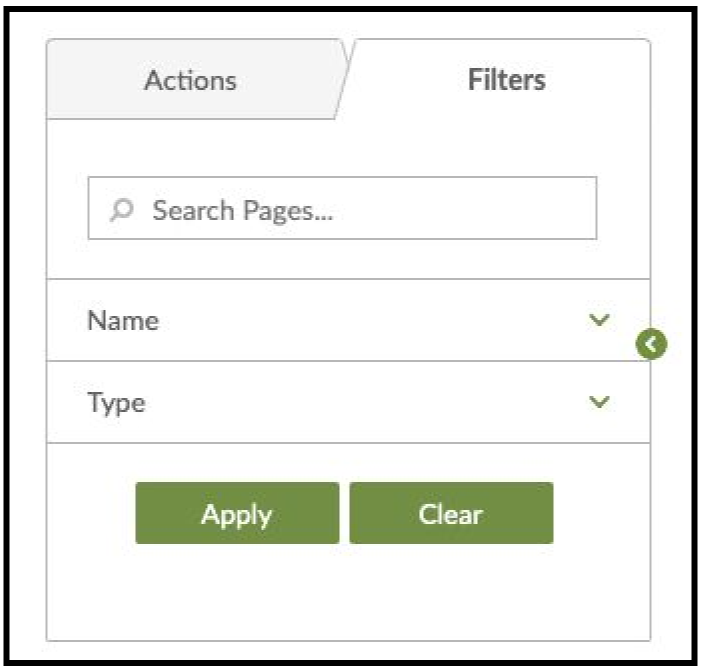
Locating Pages and Content in OrchestraCMS

Once you start generating pages and content in OrchestraCMS, not all the pages or content will appear in the initial listing of the Content or Pages tabs. There are several methods of locating what you want.

Searching

The best method, if you know the name of the page or content you are looking for, is to search for it from one of the available search boxes.

1. Select the Pages icon.
2. Click on the **Filters** tab.
3. Enter **Login** in the search box shown below and click **Apply**.



4. This returns any pages containing the word **login** in the page name.

Note	You can use % signs when searching to wrap your search term. For example **%lo%** will also return the SiteLogin page.

A strong naming convention is the best way to locate pages and content in OrchestraCMS. Work together with your team to come up with a standard for naming your content and pages to make locating them easier in the interface.

Tagging

If the feature has been enabled by your Administrator you can also tag pages and content with your own metadata and then use the metadata to filter the views of pages or content. This might be handy for instance if you were going through a site and wanted to mark pages as translated. You could add a **translated** tag to each item as it was completed so that you would know when all the pages had been translated. In this case we will tag all of our landing pages.

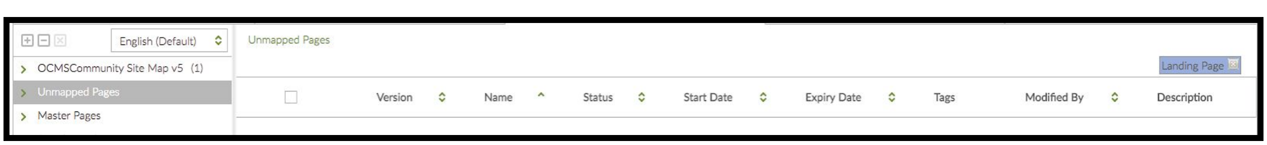
1. Search for %**Landing%**.
2. Open each of the two landing pages you created and on the page editor tab for each page expand **More Actions** button and select **Tags**.

Two fields are available Personal Tags and Public Tags. Personal tags are exposed only to your user account. Public Tags can be viewed by other OrchestraCMS users to filter pages and content as well.

3. In the Public Tags field, enter the value **Landing Page** and click **Save**.

The tagging system does not let someone predefine a list of tags for people to select from. It is instead a freeform system allowing users to enter any tag they want. This means that, much like content naming and page naming, prior to using tags you should standardize a tagging system with your team. Ensuring everyone is using a standardized set of tags will make the filtering system more effective.

4. After each of the landing pages has been tagged the same, close the page editor tab for each landing page.
5. On the Pages tab click the **Unmapped Pages** node.
6. In the Views Tagged column, click on one of the Landing Page tags and select it. The view is then filtered down to just other pages that are tagged with Landing Page.
7. You can clear the tag filter by removing the tag indicated below.
8. The error pages have already had tags applied to them by the administrator. In the View Tagged column, choose one of the Error Pages tags. The view should be filtered down to just the predefined error pages. Clear the tag again.



Another possible use for tags is to tag content with the names of files that the content links to making it easier to locate content when you need to update links to a file.

Filtering Content

Content has a slightly different filtering system. In addition to search, the Content tab and other content listings can also be filtered by Status, Type, Start Date and Expiry Date.

1. Select the Content tab.
2. From the filter icon beside the Type column, choose the value **Text** and click **Apply** at the bottom of the list. The view should filter to show only the content items belonging to the Text content type.
3. Multiple filters can be applied to the view. For example, you could filter text content with a Start Date of Today.
4. At the bottom left of the Content tab there is an option to change the number of items to display in the list with options of 25, 50, 100, 200 and 500.

Note	The larger the listing selected the longer it will take to display the view.

5. If the number of items available is higher than the number of items per page there will be buttons to navigate to additional pages of listings in the bottom right.

Updating Pages and Content

Once a page or piece of content has been published, any changes to be made to the page in the form of adding or removing content or changing the template requires a new version of the page to be created. Any changes to a content item require a new version or revision of the content item to be recreated.

Note	Creating a new version of a piece of content on a page does not require a new version of the page. You cannot change the available languages on a New Revision of a piece of content. To add a language you MUST make a New Version.

As we have seen both OrchestraCMS content and pages support future start and end dates. This allows you to get a jump on future updates to your website. They can be published now and not go live until a specific date and time. For the following exercise we will prepare a page that will set out our sales for the next three weeks. We will do this by preparing multiple versions of a piece of content each with a different sale that will run for one of the three weeks. We will also look at the difference between using New Version and using New Revision.

1. Click the Pages icon.
2. Click **Create New Page**.
3. Set the properties as listed then click **Finish & Edit**.
    - Name : OnSale
    - Title : Half off this week
    - Description : Weekly Sales
    - Page Template : EverreadyForm
    - Master Page : Master
4. Click in the top panel of the middle column and choose **Add New Content**.
5. Set the details as listed and click **Finish & Edit**.
    - Content Type : Text
    - Name : Weekly Sales
    - Description : Items for sale each week
    - Content Template : Document Style 1
6. Click **Properties**.
7. Set the **Start Date** field to this coming Monday at 12:00am.
8. Set the **End Date** field to the following Sunday at 11:59pm.
9. Click **Save** on the Properties panel.
10. Enter the text **50% off Hosewares**. ****Please include the misspelling "hosewares".**

11. Publish the content.

Now to create a new version of the content with a different sale for the week after.

12. Click **New Version**.
13. Click **Properties**.
14. The **Start Date** field should already be set to the end date of the previous version.
15. Set the **End Date** field to the following Sunday at 11:59pm.
16. Click **Save** on the Properties panel.
17. Enter the text **50% off Appliances**.
18. **Publish** the content.

One more version for the week after and we will be complete. We will have lined up our website sales for the next three weeks.

19. Click **New Version**.
20. Click **Properties**.
21. The **Start Date** field should already be set to the end date of the previous version.
22. Set the **End Date** field to the following Sunday at 11:59pm.
23. Click **Save** on the Properties panel.
24. Enter the text **50% off Bedding**.
25. **Publish** the content.
26. Expand **More Actions** and click **View Version History**.

You can see each of the versions of the content is published and set to go live on a different week. When one expires the next one will take over. A job well done. At this point a co-worker notifies you about the spelling mistake in Hosewares. Now we need to address the spelling mistake in version one. If we were to create a new version we would end up with version 4 and it would not go live until after version 3 had completed its run. So we need to inject a revision between version 1 and version 2. Clicking on any of the version numbers in the version history will open that version in a new tab. We can then make a new revision from that version.

1. Click the link for **v1.0**.
2. You should now have a tab for version 1. Select that tab if it is not selected.
3. In the new tab that opened, click **New Revision**.

If we had clicked new version then it would have created version four to go live when version three was due to expire. For this reason revisions are provided. Revisions are intended to be used when you need to alter an existing version but there are future dated versions already published.

4. Correct Hosewares to **Housewares**.
5. **Publish** the new revision.
6. Choose **View Version History** from under More Actions in the Actions panel.

You can now see that v1.0 will go live and expire at the same time. Followed by v1.1 going live in it's place and expiring when v2.0 takes over.

You can open any previous version of a piece of content and use **New Version** to make a new version of the content using the properties of the old version. For instance right now in our example

Version	Text
v1.0	50% off Hosewares
v1.1	50% off Housewares
v2.0	50% off Appliances
v3.0	50% off Bedding

If you open v1.0 and make a new version (instead of revision) it will make v4.0 and will have the text "50% off Hosewares". However if you open v2.0 and make a new version then v4.0 will say 50% off Appliances.

You cannot however do the same thing with a page in OrchestraCMS. If you make a new version of a page it will always create the new version from the latest version of the page. For instance if you have four versions of a page and open v1.0 and make a new version it will make v5.0 based on v4.0 of the page not v1.0.

In most instances when you edit content on a page that change will be reflected on the published version of the page. In some instances the content change may not be reflected on the published page. This is due to OrchestraCMS caching. Caching is a process where OrchestraCMS stores a static copy of the published page to improve performance on the site. Caches should be automatically updated when you make changes. Under certain circumstances this may not happen right away. Since this copy is static you may need to refresh the cache manually. There are several ways to do this.

a) When making a change to content items that exist on a single page, using the Refresh Cache option in the Actions panel on the page will resolve the issue.

b) You can refresh the cache from the content itself using the Refresh Cache from the Actions panel on the content.
c) You can refresh the cache of multiple pages or content from the Pages tab or the Content tab by selecting multiple published pages or content and then using the Refresh Cache option in the Actions panel.
d) If the content item you are editing exists across many pages, for example a menu, and is not on a master page, then any user with permissions to the OrchestraCMS Setup can use the Cache -> Page -> Refresh All to refresh all the page caches to have them update as a group.
e) For content that exists on many pages because it was placed on a master page, you can then open the master page and use the Refresh Cache option from the Actions panel on the master page.

Media files are also versionable. If you need to update a file in the media library that is used within OrchestraCMS content either as an image or that is used in a link for downloading the file, you can update that file in the media library and the change will automatically be reflected in any links to that file. An example of this would include a link to a benefits form PDF file in a piece of content. You are emailed an updated benefits form along with a URL for the page that the link appears on. You need to update the existing PDF file with the new copy you were emailed. The following is the setup and process for how that would be done.

1. Click the **Media** tab.
2. Highlight the media library on the left.
3. Click **New Folder**.
4. Assign it the name **PDFs**.
5. Expand the media library on the left and highlight the PDFs folder on the left.
6. Click **Upload**.
7. Click **Choose Files** or you can drag and drop the file from your local drive into the dialog.
8. Browse your hard drive and select a copy of this training guide PDF file.
9. Click **Upload**.
10. When the upload is complete click **Close**.

This will act as the original file we will create a link to. Now to create the link.

11. Open your HomePage. (Create a new version if needed)
12. Click in the large panel and choose **Add New Content**.
13. Set the properties listed below and click **Finish & Edit.**

    ○ Content Type : Text
    ○ Name : TrainingLink
    ○ Description : Contains link to 101-OrchestraCMSBasicUserTrainingSummer15.pdf
    ○ Languages : English
    ○ Content Template : Document Style 1

14. Enter the following into the rich text editor.
    Click here to download the OrchestraCMS User Training Guide
15. Highlight the **OrchestraCMS User Training Guide** text and click the link icon.
16. In the Link popup dialog click **Find OrchestraCMS Link**.
17. Choose Open In… The Current Window.
18. Choose Link To… A file in this CMS.
19. In the Select Link dialog browse your media library and select the training PDF file you just uploaded.
20. Click **Select**.
21. Click **OK**.
22. Close the OrchestraCMS tab for the TrainingLink content.
23. **Publish** on the Home page.
24. Open your live site and access the Home page.

You should see the link you added to the training guide. The scenario is that a stakeholder has sent you an updated copy of the training guide and asked you to update it on the website. The first step is to copy the link from the live website so we can find the file we are trying to update.

25. Take any other PDF file, or if you only have the one make a copy of it on your hard drive.

This will be the updated file that our stakeholder has sent you to update on the website. Now we need to update the file in OrchestraCMS with this new copy.

26. Click the Media tab.
27. Select the media library from the list on the left.
28. Click the Filters tab on the left.
29. Paste the link you copied from the live site into the search box on the Filters tab and click **Apply**.

30. When the file is returned click the folder shown in the returned results. This will open that folder in the media library.
31. You can now hover over the file name and you will see an icon appear to the right of the file name. Click the icon and the current training file will be downloaded to your hard drive. You can then open the file to verify it is indeed the correct file you are trying to update.
32. Select the checkbox for the file and click **Upload**.

Because this file is selected the file you are uploading will be a new version of the selected file. If you did not have it selected then it is only a new version of the existing file if they both have the same file name.

33. Click **Choose Files**.
34. Select the new training PDF file.
35. Click **Start Uploading**.
36. When the upload is complete click **Close**.
37. You can now see that the file is version 2. Click the 2.0 to the left of the file name and the version history opens up.

You can choose any version and click the restore button to make that previous version the most current version. For example restoring version 1 of the file would make a version 3 that would be a copy of version 1.

If we now wanted to see all the content or pages that are affected by the file update we can follow the procedure below.

1. Select the checkbox beside the training pdf file.
2. Expand the Manage action select **View Connections**.

From the view connections panel you can see a list of the content that uses this media file. In our example there is only one piece of content. However if multiple content used this media file they would all be listed here.

3. Click the drill down icon next to the content item name. This will show you a list of all the pages that use that content item.
4. You can then select the options on the left to view the media used by that content or the taxonomy categories assigned to the content.

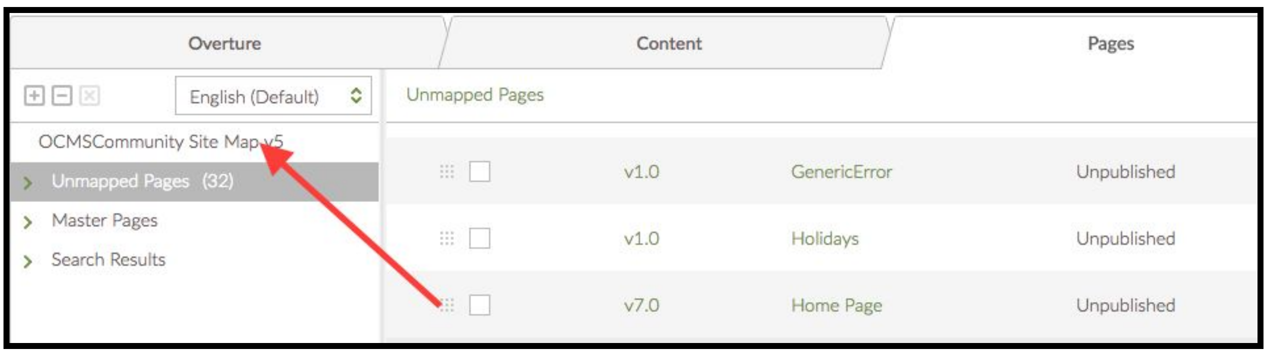
Every media file, page and content item has a View Connections option that you can use to view what pages, content, media or taxonomy tags are used by that item. This way we can know all the items and pages that will be affected by our changes.

Using the SiteMap Content Item

Many websites make use a navigational aid known as a site map. This is usually a page on their site that provides a visitor with a table of links to the main pages within their site so that pages can be easily found by the visitor in case they are not completely sure what they are looking for.

OrchestraCMS provides an out-of-the-box content for the sitemap. Pages added to the Site Map tree on the Pages tab will be automatically built into a content item that can be placed on a page to provide a navigation tool for site visitors trying to locate pages on a site. Only one Site Map can exist per site. For these exercises we will construct a site map and place it on a site map page as a navigational aid for our visitors.

1. Toggle the Site Map Mode **ON**.
2. Highlight the **Unmapped Pages** node.
3. Drag your Home Page to the root of the Site Map as shown below if it is not already there.



This page is now served up as the root or home page of your site. When a visitor accesses the base URL of the site, for example http://yourdomain.com, this is the page that is sent to their browser. The page is also accessible by its assigned URL. For example: http://yourdomain.com/Home. Only one page can exist as the root of the site. All other pages added to the Site Map will need to be under this page.

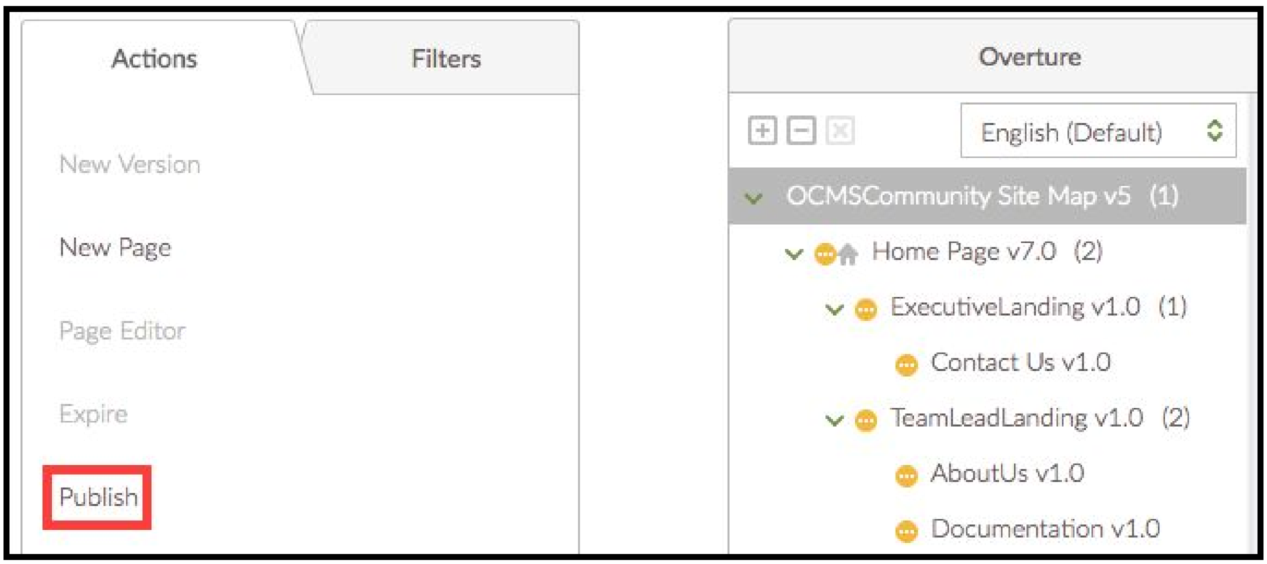
4. Highlight the **Unmapped Pages** node.

If at any point you need to remove a page from the site map, you can highlight the page in the site map and click the x icon just above the site map.

5. Please drag in the pages from the Unmapped Pages node to the Site Map to have it look like the image below.

Once a site map is changed it becomes necessary to publish the site map for the changes to take effect. You can do that by highlighting the top of the Site Map and clicking the publish action as shown below. Publishing the site map will publish any unpublished pages in the site map. If you do not want the unpublished pages to be published, unselect them from the dialog that comes up after you click the Publish action.

You do not need to republish the site map if you make an edit to one of the pages in the sitemap. You only need to republish the site map if you make changes to the structure of the site map.



6. Once all the changes are made publish the site map.
7. When the site map publish is complete open the Site Map page we created earlier from the Unmapped Pages node.
8. Click in the largest panel and choose **Add Existing Content**.
9. Search the content listing for the word **site** .
10. The **OpusMusicCommunity Site Map** content should be returned in the results. Click the **+** sign to add it to the page.
11. Close the Add Content To Page dialog.
12. Click **Preview**.

The Site Map content item is unique in that it will always show as unpublished because as soon as you publish it a new version is created, so you can add new items to the Site Map tree on the Pages tab.

You will see a series of links laid out in the style of your site map from the Pages tab. The styling of the list of links is controlled by your design team.

Displaying Salesforce Data

Since OrchestraCMS is native to the Salesforce platform, it is capable of exposing record listings and details to a site. This is useful when you need to expose Salesforce data on a page. For example a list of support cases for the current user. We will use this to create a Staff Directory for our website.

1. Click the Pages icon.
2. Click the **Create New Page** action and set the properties as listed below and click **Finish & Edit**.
   - Name : EmployeeDirectory
   - Title : Employee Directory
   - Description : Employee Directory
   - Keywords : Employee, Directory, Staff
   - Page Template : HarmonyFullWidth
   - Language : English
3. Click in the General Content Area panel and choose **Add New Content**.
4. Set the properties as listed below and click the **Finish & Edit** button.
   - Name : StaffListing
   - Content Type : List View
   - Content Template : List View
   - Description : Staff Listing
   - Language : English
5. Set the Title to **Staff Directory**.
6. Leave the Rows per Page as **25**.
7. Select the Show More checkbox.
8. Click in the **Detail Page** field and set the properties listed below.
   - Open In... : The Current Window
   - Link To... : A Page in this CMS

9. For the Page field click the **New** button and create a page with the properties shown below and click **Finish**.
    - Name : EmployeeDetails
    - Title : Employee Listing
    - Description : Employee Listing
    - Keywords : Employee, Directory, Staff
    - Page Template : HarmonyFullWidth
    - Language : English

We will need to open this page later and add the Detail List Layout content template to it so that when a user clicks through they will see the details of the selected record.

10. Click the **Select** button.
11. From the Salesforce Object drop down select the **User** object.

The Related List field is used to link to a related list view for one of the Related Lists from Salesforce. We are not going to use this feature at this time.

12. From the Available Fields list, move **Full Name** and **Phone** to the Selected Fields column.
13. Click the chain link icon as shown below on the Full Name field to make the Full Name field a link to the detail page we just created.

The List View content type offers us the ability to filter the records displayed based on any of the available fields. For example we could filter the employee directory based on department and country so that this would be a Canadian HR staff directory. For this exercise we are not going to set any filters. You can also limit the content to show just records the user owns instead of all records. You would use that for example when you were displaying cases so that the visitor would only see their cases.

14. Select the **Sort using column heading** and **Search** checkboxes.
15. Set the Search Button Text to **Find Employee**.
16. **Save** the content.
17. Expand the **Templates** action and choose the **Detail List Layout** content template.

The edit view of the content will change so we can configure the options for how to display the record detail view. This is what will be displayed when the visitor clicks on one of the staff names from the initial list of staff.

18. From the Available Fields column click on the **Full Name**, **Department**, **Phone**, **Extension**, **Fax** and **Email** fields to add them to the Selected Fields column.

You can use the pencil and pad icon to change the Display Name on any of the fields for display on the page.

19. **Save** and close the tab for the StaffListing content.
20. On the Pages tab open the EmployeeDetails page from the Unmapped Pages node.
21. Click in the General Content Area panel and choose **Add Existing Content**.
22. Locate the StaffListing content and add it to the page using the **Detail List Layout** content template.
23. Close the Add Content to Page dialog.
24. **Save** the page and close the tab for the EmployeeDetails page.
25. Click on the tab for the EmployeeDirectory page.
26. Click the **Preview** action.

You should see a list of all the Salesforce user records. You can sort the list by any of the column headings and also search the list to retrieve specific matching records. Clicking the Full Name field of any of the records should take you to the detail page we created and display the details of the record. Formatting of the detail view can be handled by a development team via CSS.

Inserting Custom Code into a Page

The OrchestraCMS content management system is intended to enable business users who may not have any coding skills, with the ability to update website content. That being said there may be instances where a use case arises that involves including some provided code into one of the pages in OrchestraCMS. If limited coding needs to be handled by content editors and authors, OrchestraCMS provides a Custom HTML content template that can be used to place HTML, javascripts and CSS directly on a page or master page. An example might be a snippet of code provided to embed a video into a page. For this example we will be including some specialized styling to be applied to a component only on a specific page.

1. Open the EmployeeDetails page from the Page icon.
2. Click in the unlabelled top panel and choose **Add New Content**.
3. Set the properties as listed below and click **Finish & Edit**.
    - Content Type : Utility
    - Name : EmployeeDetailStyling
    - Description : Special CSS for the EmployeeDetails page
    - Content Template : Custom HTML
    - Language : English
4. The Custom HTML content template presents an unformatted text box for you to place your code snippets in. Copy the code from the **Employee Detail Styling.txt** file from the Code Samples.zip provided with these exercises. This code is just some sample CSS that we will use to style the layout for the Employee Details grid.
5. Paste the code into the text box on the content tab.
6. **Save** the Content and close the EmployeeDetailsStyling content tab.
7. Open the EmployeeDirectory page from the Recent Pages list.
8. Click the **Preview** action.
9. Click the link for one of the user records.

It should now load the details page for that user's details. Note that the styling rules from the custom HTML content have been applied to the user record. It now looks differently than it did prior to our inclusion of the custom styling rules on the page.

The recommended method for scripts and CSS is to have your development team include them in your static resource files and have those called from the code for the page template. However in some circumstances authors and editors may need to place small sections of script, styling or code on a page. The Custom HTML component is provided for this use.

Email Publications and Notifications

OrchestraCMS provides the ability to keep your website subscribers up to date with the latest content via email. This is offered in two different fashions.

Publications are essentially newsletters you can send out through OrchestraCMS. You can build out a page in OrchestraCMS and assign it one or more categories from a taxonomy. Anyone who is subscribed to that category will receive a copy of the page as an email when one of your authors or editors decides to send it out.

Notifications are emails containing updated content, for example articles, that are automatically sent out on schedules that your administrator defines. Your editors and authors can assign taxonomy categories to content and any user who subscribed to those categories will receive a copy of that content in an email based on the schedule they selected when that content is published.

OrchestraCMS alleviates much of the management of mailing lists and subscriptions by enabling site visitors to manage their own subscriptions and their categories of interest, including the ability to unsubscribe.

Publications

For this exercise will we create an employee newsletter that can be sent out manually whenever you choose. It will be distributed to all employees who have subscribed to the newsletter. The first step is to create the taxonomy that will hold the categories your visitors will subscribe to. Since we are only enabling people to subscribe to a newsletter our taxonomy will only have the one category.

1. Click the **Content** icon.
2. Click the **Create New Content** action.
3. Set the properties as listed below and click the **Finish & Edit** button.
    - Content Type : Taxonomy
    - Name : EmployeeNewsletter
    - Description : Employee Newsletter Subscription Content
    - Content Template : Taxonomy Menu
    - Language : English
4. From the menu icon to the left of the taxonomy name choose **New Category**.
5. Add the category **Newsletter** and click **OK**.
6. Expand **More Actions** and click **View All Properties**.

7. In the Taxonomy Page Properties area at the bottom, set the Notification Type to **All**.

All allows a user to subscribe at any level of the classification tree you create. Leaf only allows visitors to subscribe at any bottom level node. For example in the image below Leaf would allow subscriptions at Canada, Mexico, United States, United Kingdom, France and Germany but not North America and Europe.

8. Set the Notification Model to **Subscription Model**.
9. Click in the **Select Detail Page** field and set the properties as listed below.
    - Open In… : The Current Window
    - Link To… : A Page in this CMS
10. Click on the **New** button to create a new page for loading these categories and set the properties as listed below and click **Finish**.
    - Name : Subscriptions
    - Title : Newsletter Subscriptions
    - Description : Newsletter Subscriptions
    - Keywords : Newsletter, Subscribe
    - Page Template : HarmonyFullWidth
    - Language : English
11. Click the **Select** button.
12. Click **Save**.
13. Save the taxonomy content and **Publish**.
14. When the publish has been completed, close the EmployeeNewsletter content tab.
15. Open the **Subscriptions** page you just created from the Recent Pages panel on the Overture tab.
16. Click in the Class Styled Menu panel and choose the **Add Existing Content** option.

17. Locate the EmployeeNewsletter taxonomy and add it to the page using the **Taxonomy Menu** content template.
18. Click in the General Content Area panel and choose **Add Existing Content**.
19. Locate the EmployeeNewsletter taxonomy and add it to the page using the **Taxonomy Subscription** content template.
20. Close the Add Content dialog

The Menu template provides the link they can click to load the subscription link and the Subscription template loads the link they can click to subscribe to the newsletter. We also want the ability for them to manage their subscriptions and unsubscribe so we are going to add the Profile content to allow them to do this.

21. Click in the General Content Area panel and choose **Add New Content**.
22. Set the properties as listed below and click **Finish**.
    - Content Type : Portal
    - Name : UserProfile
    - Description : User Self Management
    - Content Template : My Profile
    - Language : English

If you preview the page at this point you can see that the profile information is very scattered. If only we had a way to add some styling to the page so that we could arrange this in a neat fashion. Lets add a Custom HTML content template with some styling so was can pretty up the profile information.

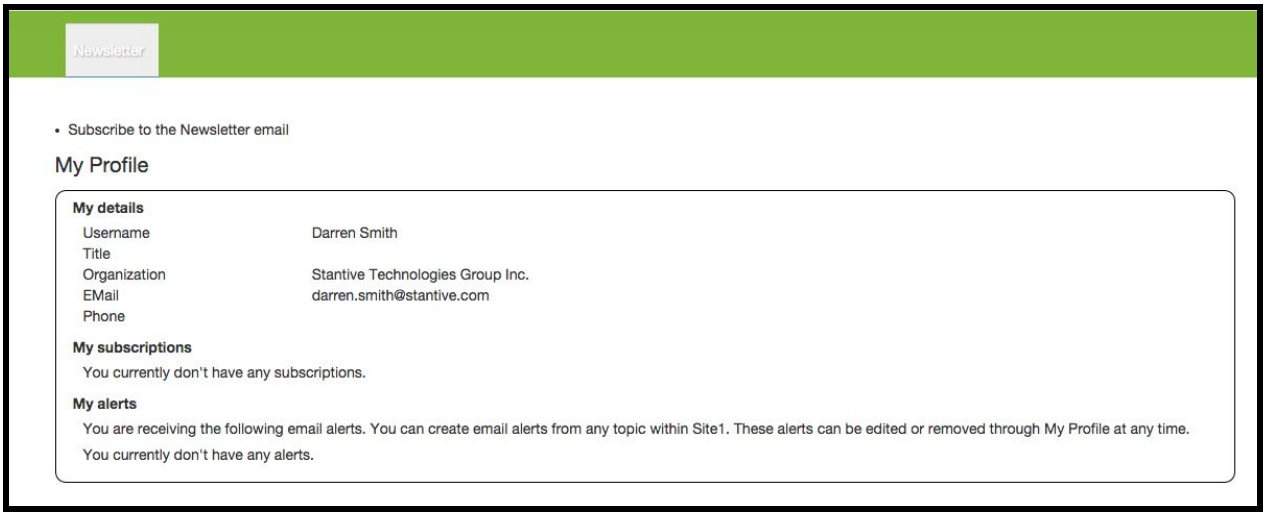
23. Click in the unlabelled panel at the very top of the page and choose **Add New Content**.
24. Set the properties as listed below and click **Finish & Edit**.
    - Content Type : Utility
    - Name : ProfileStyling
    - Description Content : Custom Styling for the Profile
    - Content Template : Custom HTML

25. Copy the contents of the **Profile Styling.txt** file provided in the User Code Samples.zip file.
26. Paste the code you copied into the textbox on the ProfileStyling content.
27. **Save** the content and close the ProfileStyling content tab.

Now if you preview the page you will see the profile information has been tidied up by the styling code we added.

28. Click the arrow icon on the Taxonomy Menu content template widget and set the page specific property **Show Top Level** to **No** then click **Save**. Leave the rest of the settings as their default.
29. Click the **Save** action for the page.
30. Click the **Preview** action.
31. On the Preview tab for the Subscriptions page click the **Newsletter** link.

You should be given a link to Subscribe to the Newsletter email as shown.



32. Click the phrase **Subscribe to the Newsletter email**.

The message changes to “You are subscribed to Newsletter”.

At this point a subscription has been added to the OrchestraCMS system for your Salesforce account. The My Profile content template provides profile management functions, including the ability for users to manage their subscriptions after they have subscribed. If you preview the page again you will see the options to unsubscribe.

Now we need to create a newsletter page that can be mailed out to the subscribers. The OrchestraCMS Administrator needs to enable email functionality for any page templates you are going to use to send publications. The Administrator also needs to create a Manual Mail-out job for the OrchestraCMS scheduler to use for sending the email. This has been done for you.

1. On the Pages icon click the **Create New Page** action.
2. Set the Properties as listed below and click **Finish & Edit**.
    - Name : Newsletter
    - Title : Company Newsletter
    - Description : Latest Events and Notices
    - Keywords : newsletter, events, notices
    - Page Template : EverreadyForm
    - Language : English

Note	The Title field will be the subject line of the email.

3. Expand **Taxonomy** and click **EmployeeNewsletter**.
4. Add the **Newsletter** tag and click **OK**.

This assigns the category to the page so that anyone subscribed to that tag will receive a copy of this when it is sent as an email. Multiple tags can be added if there is more than one category that you are targeting with this publication.

5. Add the Logo content to the top panel on the page.
6. Click in the top panel of the middle column and choose **Add New Content**.
7. Set the properties as listed below and click **Finish & Edit**.
    - Content Type : Text
    - Name : NewCEOAnnouncement
    - Description : Included in First Quarter Newsletter
    - Content Template : Document Style 1
    - Language : English

8. Set the Title field to **New CEO takes the rudder**.
9. Add the text below to the Document field.

Stephen Lisor has taken the helm as the new CEO of OurBusiness. Click here to read more.

10. **Save** the Content.
11. Expand **Templates** and click **Add a Template**.
12. Select the **Text Block** template and then click **OK**.
13. Add the text below to the Document field.

Stephen Lisor has successfully piloted several companies through tough times and brought them to the forefront of their respective industries. He is proud to be offered the opportunity to take the helm at OurBusiness and looks forward to working with all of us to move us forward into a bright future.

14. **Save** the content and close the NewCEOAnnouncement tab.
15. Click in the top panel of the middle column and choose **Add New Content**.
16. Set the properties as listed below and click **Finish & Edit**.
    - Content Type : Text
    - Name : NewOfficeAnnouncement
    - Description : Included in First Quarter Newsletter
    - Content Template : Document Style 1
    - Language : English
17. Set the Title field to **New Office Opening**.
18. Add the text below to the Document field.

Our new office is opening in Sydney Australia on the first of August. Click here to read more.

19. Expand **Templates** and click **Add a Template**.
20. Select the **Text Block** template and then click **OK**.
21. Add the text below to the Document field.

We are breaking into new markets with the official opening of our new office location in Sydney Australia. At the beginning of August there will be 15 floors of new employees beginning their journey with OurBusiness and we would like to welcome them all aboard.

22. **Save** the content and close the NewOfficeAnnouncement tab.

We could add more information to our newsletter but for now this should suffice. If we want users to be able to click links in the email and be directed to a detail page on our site with detail articles we need to first create the detail page.

23. From the Manage Site tab click the **Create New Page** action.
24. Set the properties as listed below and click **Finish & Edit**.
    - Name : NewsletterDetail
    - Title : New News
    - Description : Destination page for links in the quarterly newsletter
    - Page Template : EverreadyForm
    - Language : English

25. Click in the top panel of the center column of the middle row and choose **Add New Content**.
26. Set the properties as listed below and click **Finish**.
    - Content Type : Utility
    - Name : NewsletterTarget
    - Description : Detail placeholder for links clicked in the quarterly newsletter
    - Content Template : Content View
27. Click the menu icon on the NewsletterTarget content placeholder on the NewsletterDetail page and open the page specific properties dialog.
28. Set the **Content Type** in the page specific properties to **Text** and the **Content Template** to **Text Block** and then click **Save**.

This will act as a placeholder for whichever article the visitor has clicked in the newsletter when they arrive on this page.

29. **Save** the page and close the NewsletterDetail page.
30. On the Newsletter page expand **More Actions** and click the **View All Properties** action.
31. Expand **Advanced Properties**.
32. Scroll to the bottom and you will see an Email Link field. Click in the **Email Link** field and set the properties as listed below and click **Select**.
    - Open In… : The Current Window
    - Link To… : A page in this CMS
    - Page : NewsletterDetail
33. **Save** the properties of the page.

In order to send the publication to the subscribers, you must first publish the page. You can, however, test the email prior to publishing to ensure it looks the way you expect it to.

34. From the **Actions** panel expand **More Actions** and click the **Send Test Email** option.

The email address you have defined for your Salesforce user account should receive a copy of the email.

35. Click **Publish** and publish the page and all of its content.
36. Click **OK**.
37. When the publish is complete, expand the **More Actions** and you will see a Queue Email option. Click the **Queue Email** option. Cancel this dialog.

You are given a dialog to use Standard Priority, which will attempt to compile and send the emails to the subscribers the next time the OrchestraCMS scheduler runs. High Priority will attempt to compile and send the email to subscribers now. The scheduler sends the emails as an Apex Batch job from within Salesforce. Salesforce limits the number of Apex Batch jobs that can run at any one time. If there are no slots available for the batch job in Salesforce, the OrchestraCMS scheduler will make the attempt to send the emails again at the next scheduled run which is at an hourly interval.

Notifications

Where a publication is a page you manually add the content to and then manually send out, notifications are based around pages that are mailed on a schedule and dynamically populated with content based on:

- What taxonomy topics the user is subscribed to.
- What content has been generated since the last scheduled mailing.
- A specific type of content.

For our example the OrchestraCMS Administrator has defined three schedules Morning Mailer, Afternoon Mailer and Evening Mailer. Each of these schedules will send out the NotificationsMailer page dynamically populated with the latest Article Summaries based on topics subscribed to by the users.

In this scenario we are going to enable a notifications system for our employees to subscribe to notifications for topics in our HR system. Then when authors and editors publish new articles related to one of the HR topics our subscribed employees will receive email updates with the new articles.

To enable our users to subscribe to the topics we must first create a taxonomy to offer the subscriptions.

1. Open the Content tab.
2. Click **Add New Content**.
3. Set the properties as listed below and click **Finish & Edit**.
    - Content Type : Taxonomy
    - Name : HR Notifications
    - Description : Subscriptions for HR Notices
    - Content Template : Taxonomy Menu
4. Click **New Category** from the menu icon on the HR Notifications node.
5. Add the categories **Benefits**, **Options**, **Closures** and **Policies**.
6. Click **OK**.

7. Expand **More Actions** and click **View All Properties**.
8. Set the Notification Type to **All**.
9. Set the Notification Model to **Email Alert Model**.
10. Click in the **Select Detail Page** field and set the properties as listed below.
    - Open In… : The Current Window
    - Link To… : A Page in this CMS
11. Click on the **New** button to create a new page for loading these categories and set the properties as listed below and click **Finish**.
    - Name : HRSubscriptions
    - Title : HR Subscriptions
    - Description : HR Notification Subscriptions
    - Keywords : HR, Subscribe
    - Page Template : EverreadyForm
    - Language : English
12. Click the **Select** button.
13. Click **Save**.
14. Save the taxonomy content, and select the **Publish** action.
15. When the publish has been completed, close the HR Notifications content tab.

Now that we have defined our categories we need to edit the page where our users will go to subscribe to the categories they want.

16. Open the HRSubscriptions page you just created from the Overture tab.
17. Click in the long horizontal panel and choose **Add Existing Content**.
18. Add the HR Notifications content using the Taxonomy Menu content template.
19. Close the Add Content dialog.
20. Click the page specific properties arrow on the HR Notifications content.
21. In the Page-specific Properties dialog set Show Top Level to **No** and click **Save**. This will show our menu options on one line instead of dropping down a menu from the name of the taxonomy.
22. Click in the top panel of the middle column and choose **Add Existing Content**.
23. Add the HR Notifications content using the Taxonomy Subscription content template.
24. Click **Preview**.
25. Click **Benefits**. This will reload the page showing the option to subscribe to Benefits notifications.
26. Click **Add an email alert for Benefits**. You should then have the option to select which schedule you would like to have the notifications sent to you on. These schedules are configured by your OrchestraCMS Administrator.
27. Select AfternoonMailer and click **OK**. You should get a message indicating you are receiving email alerts for Benefits.

At this point a subscription for your user with the Benefits category has been registered with OrchestraCMS. You will get emailed any new published Article Summaries tagged with the category you selected on the schedule you selected. If there are no new articles tagged with that category then you do not get an email. You can subscribe to multiple categories and all the content should be consolidated into a single email for you.

There is one step left. When the OrchestraCMS Administrator configured the schedules, part of the process was to create and select a page in OrchestraCMS that would be sent as the email. The last step is to configure and publish the page that the Administrator created.

1. Open the **NotificationMailer** page from the Pages icon.
2. Click in the top panel of the middle column and choose **Add New Content**.
3. Set the properties as listed below and click **Finish**.
   - Content Type : Utility
   - Name : HR Notifications Placeholder
   - Description : Placeholder for HR Notifications
   - Content Template : Content List

At this point in a production scenario you would continue to add content to the page to the point where it is branded and looks the way you would expect. You do not need to add the Articles to the page since the relevant articles will be dynamically added in place of the Content List when the email is sent on schedule. No further modifications to the page are required. Any Articles created and published from this point on will be dynamically mailed out on schedule to users who have subscribed to the taxonomy categories applied to those Articles at publish time.

4. Click **Publish** on the NotificationsMailer page.

Now any time an article that is tagged with the Benefits category is published in OrchestraCMS you and any other user subscribed to that category will receive an email with those article summaries in it on the chosen schedule.

Using Chatter in OrchestraCMS

Salesforce Chatter provides functionality to bring socialization to your content. OrchestraCMS offers a Chatter content type for use in Intranets and communities. These components can be used to expose much of the Salesforce Chatter functionality within your Intranet site. Several templates are provided by OrchestraCMS for exposing Chatter data in different styles. Using these throughout your site allows you to offer collaboration between your content, employees, customers and partners.

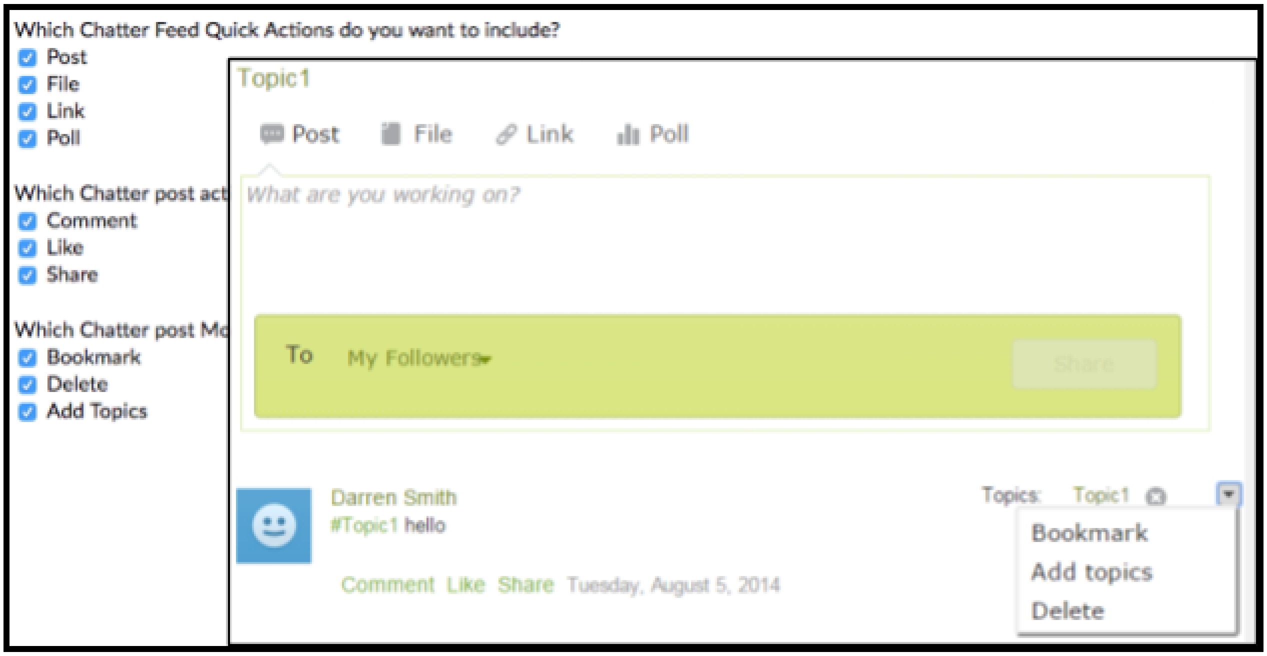
- **User/Group Chatter Feed** - This can be configured to display a user or group's Chatter feed.
- **Chatter Group List** - Displays a list of Chatter groups you can request to join.
- **Chatter Group Profile** - Displays the group information for a group that a visitor clicked on from the Chatter Group List
- **Topic Chatter Feed** - This can be used as the destination of a Topic link in a Chatter feed to display all of the posts related to a Chatter topic that a user clicks on in an feed.
- **Salesforce People List** - Used to expose users from a particular group so they can be followed within Chatter.
- **Chatter People Detail** - Displays the Chatter Profile information of the username a person clicked on in a Chatter Feed or People List.
- **Chatter Topic List** - Exposes topics that receiving a lot of activity within Chatter.
- **Chatter Topic Feed** - The Chatter feed for a topic that a user clicked on in a feed or Topic List.
- **Content Chatter Feed** - Used to associate a Chatter feed with a particular content item, for example an Article. This allows users to comment on the piece of content on the Intranet.

Trending Chatter topics is a great way to keep abreast of the latest projects and discussions taking place internally on the social intranet. A trending page can be created to collect the Chatter topics which are seeing the most activity. Each of those topics can then be linked to detail page which will display all the posts referencing that topic.

1. On the Pages icon click the **Create New page** action.
2. Set the properties as listed below and click **Finish & Edit**.
    - Name : HotTopics
    - Title : Whats Up?
    - Description : Trending Topics in Chatter
    - Page Template : HarmonyFullWidth
    - Language : English

3. Click in the General Content Area panel and choose **Add New Content**.
4. Set the properties as listed below and click **Finish & Edit.**
    - Content Type : Salesforce Chatter
    - Name : TrendingTopics
    - Description : Topics currently trending in Chatter
    - Content Template : Chatter Topic List
    - Language : English
5. On the TrendingTopics content tab set the title field to **Trending Topics**.
6. Set the Chatter Topics to Display field to **25**.
7. Leave the Include Number of people talking about this topic selected.
8. Click in the Topic Page field and set the properties as listed below.
    - Open In… : The Current Window
    - Link To… : A page in this CMS
9. Click the **New** button to create a new page. Set the properties of the new page as listed below and click **Finish**.
    - Name : ChatterTopic
    - Title : Topic Discussion
    - Description : Chatter Topic Detail Page
    - Page Template : HarmonyFullWidth
10. Click the **Select** button.
11. Save the TrendingTopics content and close the TrendingTopics content tab.
12. Open the ChatterTopic page from the Pages icon.
13. Click in the General Content Area panel and choose **Add New Content**.
14. Set the properties as listed below and click **Finish & Edit**.
    - Content Type : Salesforce Chatter
    - Name : TopicDetail
    - Description : Topic Detail Feed
    - Content Template : Topic Chatter Feed
    - Language : English

Each of the checkboxes represents a Chatter function you can choose to expose or not to expose to the visitors to the page.



15. Save the TopicDetail content and close the TopicsDetail content tab.
16. Close the HotTopics page and the ChatterTopic page tabs.

We now have pages for exposing trending topics and linking them to feeds for the specific topics. We previously created a Subscriptions page users could use to view their details and manage their subscriptions. We could also use this page to host the user's personal Chatter Feed.

17. On the Pages icon open the Subscriptions page you previously created.
18. Click in the General Content Area panel and choose **Add New Content**.
19. Set the properties as listed below and click **Finish & Edit**.
    - Content Type : Salesforce Chatter
    - Name : PersonalChatterFeed
    - Description : User Specific Chatter Feed
    - Content Template : User/Group Chatter Feed
    - Language : English
20. Select **The logged in User's** option for the Which Chatter Feed do you want to display in this content item? field.
21. In the Topic Page field select the ChatterTopic page we created previously. This allows any topics displayed in the feed to link to the ChatterTopic page and load the posts for that topic.
22. Save the PersonalChatterFeed content and then close the tab.

23. Click the **Preview** action on the Subscriptions page. You should see your Chatter feed with your profile.

You can post topics in Chatter using the format **#[topic here]**. This behaviour differs slightly from the native Salesforce format. Topics entered in Salesforce will also appear in the OrchestraCMS Chatter feeds.

24. Click in the Posting area of the Chatter Feed in the Preview window and post a few topics.

Now that you have some topics you can open the HotTopics page and Preview it to see the topics you included in your Chatter posts. Clicking one of the topics will take you to the ChatterTopic page and load all the posts referencing that topic.

It is possible for an OrchestraCMS Administrator to associate the Salesforce Chatter Content Feed content template with a content type so that you can place a piece of content onto a page using its native template and also the Salesforce Chatter Content Feed template. The Salesforce Chatter Content Feed template has already been assigned to the Article content type by your Administrator. We are going to add content related Chatter Feeds to the Detail page we created when creating our original taxonomy. This allows us to add a social aspect to our articles when people are reading them they can also comment on them.

1. Open the DetailPage from the Pages icon.
2. Click in the General Content Area panel and choose **Add New Content**.
3. Set the properties as listed below and click Finish.
    - Content Type : Utility
    - Name : ChatterContentView
    - Description : Place holder for the Chatter Content Feed
    - Content Template : Content View
    - Language : English
4. Click the page specific properties arrow on the ChatterContentView placeholder.
5. Set the **Content Type** to **Salesforce Chatter**.
6. Set the **Content Template** to **Content Chatter Feed**. Even if it is displayed by default you must actively select it for the choice to register. Click the **Save** action.
7. Open the **Notices** page.
8. Click the **Preview** action on the Notices page.
9. Choose **Notices -> General Staff** from the menu.
10. Click the title of the article that loads. It should take you to the detail page and load the detail view of the article you chose and the Chatter Feed underneath allowing you to comment on that article.

Most OrchestraCMS content offers the translation of labels displayed to visitors directly on the edit screen when you are creating the content. Chatter content differs from this process. Due to the sheer number of labels involved in Chatter content items, a master list of translations is provided via Salesforce's Translation Workbench. If you wish to alter the Chatter labels or add additional translations this must be done through the Salesforce interface.

1. From the User icon in the top right choose **Back to Salesforce**.
2. In the Salesforce User Interface Navigate to **Setup -> Create -> Custom Labels**.

This is where you find all the labels available to be translated for Chatter in OrchestraCMS.

3. Click on the **chatter_addtopics** label.

Only the English translation is displayed. To view the other translations you must enable Translation Workbench.

4. Navigate to **Setup -> Translation Workbench -> Translation Settings**.
5. Click the **Enable** button.
6. Navigate back to **Setup -> Create -> Custom Labels**.
7. Click on the **chatter_addtopics** label.

You will now see the ten base translations provided out of the box for Chatter for the Add Topics label. You can use the Override link to change any of the translations. You can also use the New Local Translations button to add languages not currently displayed.

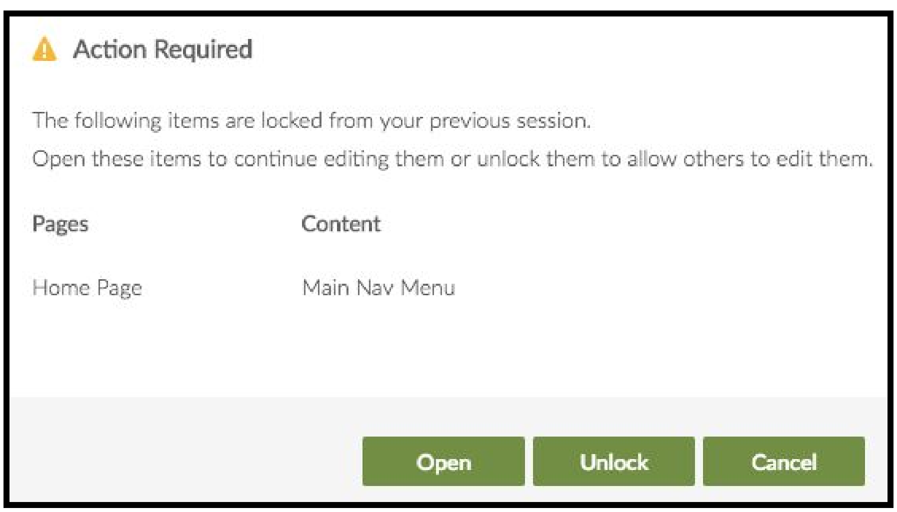
Page and Content Locking

OrchestraCMS is designed to be used by a team of editors and authors who will be updating your site content. To prevent your users from stepping on each other's toes and accidentally overwriting the changes made by other users a locking system is provided. When a user opens or creates a page or content item, that item is locked to that user until they save and close the item. This means no other user can edit that page or content until the user who initially had it open saves their changes and closes the item.

Note	If you open an item and close OrchestraCMS or your browser window, your open items will remain locked to your account, preventing anyone else from editing them. Always save and close your items before exiting OrchestraCMS.

1. Open your Home Page in OrchestraCMS.
2. Open your Menu in OrchestraCMS.
3. Create New Versions of the page and menu.
4. Reload the OrchestraCMS browser window or tab. This is to simulate coming back to OrchestraCMS after logging out or closing your browser.

You should be prompted with the dialog shown. Clicking Open will open those items in OrchestraCMS tabs and they will remain locked to your account. Clicking Unlock will remove the lock from those items so they can be edited by other users.



While the page or content is locked to your account other users will see the view below when viewing the content in their lists.

The content can still be opened when locked by another user but you will be unable to edit the content. The indicators shown below include:

- A locked by user message in the top right of the content edit screen
- The Save action is inactive
- A Currently Viewing message is displayed by the translation drop down

An OrchestraCMS Administrator can unlock the content if required.