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Introduction

A content management system is a type of software that allows you to create and organize websites easily without needing to know code. It allows the average person like you or me to do extraordinarily complex things with just a click. Castle CMS is one of the most powerful and secure content management systems in the world. We've already put it to the test powering a major US federal government website, and it has shown itself to be a runaway success.

Castle was developed over the course of more than a year by our expert team of software engineers. But the truth is, Castle isn't really a new thing at all. It was built using a similar, open source software called Plone that's been around since 2000. Many of the engineers and programmers on our team are deeply familiar with Plone, having helped develop it themselves for several years. We've taken a good thing and made it even better. With perhaps more than 100 unique improvements (we haven't counted), Castle is quickly becoming the pinnacle of website building technology.

Castle CMS is a great fit for government agencies of all sizes, medium to large businesses (we have other solutions for you small businesses out there), and nonprofit organizations. If you have a website but are interested in an upgrade, give us a call. If you're thinking about building a website but don't know where to start, we can help with that too. If you're just curious and want to take a look at it yourself, check out the Castle website at <https://castlecms.io>. You can see some of the amazing features Castle can offer, and we encourage you to schedule a short demo of the software by clicking the "Book a Demo" button.

This guide covers how to use Castle CMS. We start with how to log in and out of the site. Then go step by step how to create and edit content. We also talk about using folders and tiles to create and organize your site.

The team here at Wildcard loves to help out local businesses and organizations, so don't hesitate to ask us a question or two to see what we can do. Email us at info@wildcardcorp.com or visit our website at <https://www.wildcardcorp.com> and have a look around at the other products and services we offer.

Intuitive Content Management Experience

In developing this content management system (CMS), it was important to us that it be easy to use, even for people just picking it up and getting started with little training. A big part of what makes Castle CMS so intuitive is its user interface, specifically the toolbar.

Castle CMS's Toolbar

The toolbar(s) you see here was designed in-house by user interface experts. We've made great strides to streamline its appearance and function as much as possible. For example, when you're using Castle CMS, you'll notice that all the tools are located on one page, in one place. There's no scrolling involved to get to the tool you're looking for. Everything fits on whatever screen you're editing with. In fact, it makes full use of the available space by wrapping around your screen, giving you the full palette of options at all times.

Where other content management systems might give you a toolbar that covers up your web pages with dozens of options, Castle CMS's toolbar is minimalistic and broken into three, manageable segments: the topbar, the sidebar, and the editorial toolbar. Let's briefly explore each of these segments below.

The topbar contains high level tools on the site. This is where you go to access site setup to change all kinds of configurations of the CMS and add-on products. The topbar also features user-specific tools like your user dashboard, messages, and preferences.

Moving down to the sidebar, you'll find tools to help you manage the look and feel of the site and your content. This is where you look if you want to add a new page to the site, edit a page, or explore your site's edit history. You can also find analytics data as well as a preview button that allows you to see how your site will look in desktop, tablet, and smartphone sizes.

The final toolbar is what we call the editorial toolbar. You'll find this toolbar while editing a particular page on your site. From here you can manage the format of the page, insert dozens of content items from text boxes to Facebook pages, manage the properties of the page, and modify the layout of the page. This is where you go to get all the little details of your site right. Each of these toolbars are kept out of your way so you can see what you're doing and focus on making your site look great.

People use both images and words together to help them make quick decisions about the world. Knowing this, we combined icons with words to help you find the tool you're looking for as quickly as you can blink. Take a look at all the toolbars again. You'll notice we've used straight-forward labelling and cut out most of the jargon. You want to edit a page? Click "edit." You want to see analytics for your site? Click "analytics." It's really that simple.

More than just the toolbars make this content management system intuitive to use. In the next section, we'll take a look at how the tile-based interface is used to make editing pages on your site as easy as clicking and dragging.

Tile-Based Interface

Our engineers put a lot of thought into how content was going to be organized with Castle CMS. We thought the best way to make it easiest for you, the customer, was to use tiles. Now, tiles can be a tricky concept if you've never run into them before. They can best be understood by taking a look at the last few versions of Microsoft's Windows interfaces.

If you've been using any Windows operating system since Windows 8, including Windows phones, you'll recognize this "tile" layout and others like it. You can think of it almost like a mosaic, where an image is made up of several individual pieces. A page in Castle CMS is laid out similarly.

Each page is made up of tiles onto which you can place content like rich text, images, social media posts, and many others. Because of this, it's easy to lay out a page the way you want without having to dive into cascading style sheets or CSS. And just like you can drag and drop the icons on your smartphone, you can drag and drop content tiles around on a Castle CMS site.

Here's an example: create a text tile and write your content. Would your text look better in the left column or the right? You can find out quickly and easily by dragging and dropping the text tile to either side. Pick which one looks best to you and save the page. It all happens right in front of you.

That's all very well for a single content editor working on your site, but we know large organizations and even small ones can have several people editing a site at any given time. That's why Castle CMS supports an unlimited number of simultaneously logged-in users, the next step in exploring the intuitiveness of Castle CMS.

Unlimited Simultaneous Users

Whether you're a business with two content editors or a government agency with two hundred, Castle CMS allows all of them to be logged in simultaneously. You don't have to wait around for others to log out to do your job. This also means unlimited, free-of-charge licensing for any number of users you could ever have.

The real benefit of this aspect of Castle CMS is most clear for organizations with several departments, each responsible for their own piece of the site. You might have twenty departments with one content editor apiece. Rarely will you have two editors trying to work on the same page at the same time.

But what happens if you do? Are one person's changes overwritten when the other makes their own? Castle CMS has its own way of making sure editors don't conflict with each other. It locks pages that are currently being edited by someone, so no two people can edit an individual page at the same time. Locked out users can still go to any other page and make changes there.

You don't have to worry about locking a page manually when you start editing either, or about unlocking it when you're finished. As soon as you click the "edit" button on a page, Castle CMS automatically locks it, and when you click "save," the CMS automatically unlocks the page for other users.

What's more, Castle CMS shows you who is currently editing a page, so if you think they're done editing, but have just forgotten to save their changes and unlock the page for you, you can ask them yourself. When you're sure they are finished, and their changes are saved, Castle CMS gives you the option to unlock the page and get in there to make your changes.

This feature, like the others described before it, is one of the main contributors in eliminating human obstacles you might encounter while working with the CMS. But Castle goes beyond that, and it includes features that help eliminate technological obstacles that might get in your way. In the next section we'll look at how putting large tasks into a queue help keep up your flow.

Large Tasks are Queued

All the features we have talked about so far are ways the CMS saves you time. They keep you in motion rather than slow your organization down. But technological issues can be even more detrimental to your organization since most tech issues are difficult to predict and control. In our years working with what is Castle CMS's predecessor, Plone, we've learned to predict a lot of these issues, so we've given Castle CMS the ability to navigate as many as possible automatically. One example is what we call process queues.

If you've ever downloaded entire albums of music to your computer at once, what usually happens? It only downloads a few songs at a time. If you attach a dozen files to an email, the same things happens. It may seem like it's making you wait longer, but there's a good reason for it.

Imagine if you ran a popular ice cream shop with thousands of customers a day. But the catch is your customers don't form a line. When 20 customers show up at the counter, ordering all at once, you couldn't expect to serve them all by yourself as quickly as if you were just serving one at a time. The whole shop would grind to a halt, all the ice cream would melt, and no one would get anything. Computers work the same way. As powerful as they have become, they can't handle an infinite number of tasks at once.

So when you upload lots of files to Castle CMS, what would usually be heavy, long-running processes are queued, or put in a line, and only a few are uploaded at a time. It's not just uploading either. This feature works for copying, pasting, and just moving files around on a site. And we're not always talking about just 20 items at a time. Castle can handle that with no problem at all. With some sites, you could be copying more than 1,000 items at once. Castle pushes these to the background.

With the queue running in the background, this keeps the entire system running smoothly, so you can keep working while the CMS works. When the process is done, you'll get an email notification to let you know. Just one more way Castle CMS makes content management intuitive for everyone.

Security

When creating Castle, the number one priority we had in mind was making the most secure CMS in the world. There are several ways that Castle embodies the state of the art in web design and development security, the first being dashboard security.

Dashboard Security

As described in the previous section, Castle takes an incredibly simple and intuitive approach to content management. It's easy to use and extremely flexible. But with such an easy to use system, does that make it easy to compromise? Not at all. The dashboard from which users manage the site is one of the most secure aspects of Castle, protected by several defensive measures.

It begins with reCAPTCHA software and the very creation of a user. ReCAPTCHA is a system that determines whether or not a computer user is human. This protects websites from bots or other malicious software designed to create fake users to gain access, allowing them to attack the site from the inside. The effectiveness of this program has been so successful, you've likely seen one on another website, such as Facebook. ReCAPTCHA is much more convenient than the original iteration of the program, CAPTCHA, in which users had to enter obscured letter and number combinations correctly to gain access. With this technology, users can be created quickly and with confidence.

Users with administrative permissions have the ability to set a number of login attempts allowed by the site before a user is locked out. This prevents people that don't have authorization from guessing your passwords, as well as prevents bots that try thousands of passwords until they breach the site. Castle CMS also has an auto-lockout feature which will lock users after too many failed login attempts, further preventing any nefarious users from entering where they shouldn't.

If a bot does manage to slip through, it won't get very far. Castle CMS has a feature called two-factor authentication that can be enabled to protect against such a situation. This requires a second form of electronic verification from your user to prove that they are who they say they are. Castle CMS looks for certain characteristics upon a login that may seem suspicious, and when this happens, the request for a second type of authentication is triggered. This could be a text message that sends a code, an email with a code, or even a phone call.

On top of all of that, every single time a user logs into the dashboard, their sessions are tracked. Every change, edit, or removal of any type of content is tracked and recorded. As an administrator, you have the ability to view all of the actions taken by any given user in any given session. This allows you the ability to ensure that all changes being made to your site are only being done by those that have permission. Were you to find a particular content edit that was questionable, you can easily check when that change was made, and by whom.

It's clear that on the exterior, Castle CMS has plenty of tools at its disposal to defend against security risks. But what about the content itself? We've taken just as much precaution in making sure that once users have been cleared to access the site, the content they add and manage doesn't compromise anything either through content security.

Content Security

Access to everything in Castle CMS revolves around permissions. You must have permission to view a piece of content or you will not even be able to view it, let alone edit it. In this CMS, content is organized through a system of folders, where files are stored inside folders, and folders can be stored inside of other folders. This kind of organization allows for what we call granular security, and it is the most secure way to manage the various pieces of content on a site.

Administrators can broadly restrict permission from entire folders, meaning users without access to that folder will not have access to anything in it. Permission can also be restricted to individual pieces of content. So while a user may have access to a folder, a single page, an image, or a document can all be secured individually.

To even further expand the control administrators have over their sites, permissions can be given and restricted to single users or to groups of users. This means as an administrator, you could limit access to sales material on the site to all users in a “sales” group. This is particularly useful for government sites where several departments are involved. This provides yet another safety net for preventing unwanted or unauthorized edits and views.

When it comes to actually posting content, a user of other content management systems can run into a whole different world of security vulnerabilities which aren't present in Castle CMS. Every piece of digital content carries what is called metadata, which is extra information that describes and accompanies a file. This could mean usernames, workstation names, or geo coordinates to name a few. Because there's a chance of having personal information in the metadata of a file, there's a significant risk for not just security-sensitive organizations, but anyone posting content from an external source.

For example, let's say your organization wants to share a PDF on its website that your staff have created. The metadata attached to that PDF could reveal an endless amount of personally identifying information—in essence, a roadmap back to wherever it came from. This can apply not only to PDFs, but any file type including images, videos or other files you share on your site. Because of the catastrophic potential of making such data known, Castle CMS automatically strips or scrubs personally identifiable information in known formats from uploaded files.

Look & Feel

Functionality is an incredibly important aspect of Castle CMS, as we've thoroughly covered so far in this document. The software has been purpose-built to be the ultimate enterprise CMS. But it isn't always enough to just have something that works exceptionally well. Today's consumer needs a product that looks great at the same time. That's why we've put the same amount of thought and effort into making sure that Castle CMS's form is equally stunning as its function. It all begins with the dynamic layout engine.

Dynamic Layout Engine

In the past, changing the layout of a website has been a challenging task. It required time, planning, and often enlisting the help of a professional. While that still largely remains true today, CMSs offer a lot more freedom to make the changes yourself, and make them quickly. Castle CMS ships with a dynamic layout engine. This way of creating and modifying layouts gives the user the ultimate freedom in deciding which content goes where, no matter how their site may evolve.

This feature accommodates changes both large and small, giving you the ability to create new layouts quickly and with ease. Using the tile-based interface mentioned in the intuitive content management section above, users can add, remove, or move around parts of the layout until they are satisfied with the look of a page. Changes can be applied anywhere between a site-wide or a per-page basis, so you can give each page its own unique layout if you so choose.

Once you've created a layout you like, it can be saved and reused later, so there's no need to rebuild it for other pages. Simply select your saved layout from the dropdown menu.

In web design, fashion and function share equal importance. Making an effective layout is highly important to making not only a well-functioning website, but a good looking website as well. You can make the most efficient and most logical layout ever devised, but what you can do with the layout engine is ultimately limited. Castle CMS supports easy theming for web designers who can implement beautiful designs through the web.

Easy Theming

A theme is different from a layout. While the layout controls the number of columns or rows a web-page has, the theme controls how it looks to the end user. The theme determines aspects like what colors are used, how wide or narrow the columns are, and the space between each line. You could think of it like a car. The layout determines whether there are two or four doors on either side, but the theme determines whether you identify the car as a Fiat Panda or a Ferrari 458.

Along those lines, there's a reason people covet cars like Ferraris, Corvettes, and Lamborghinis. There's a reason people camp out at Apple stores days before their newest gadget is released. These products are all beautiful to their end user. They're nice to look at. They make the person using them feel good because the product looks good. Websites are no different, and that's what makes theming so important.

Applying a theme can be a technologically complex process. A designer's original theme exists as a series of documents containing all of the necessary code before it becomes the finished site. With a typical CMS, applying the design requires ripping apart those documents and reapplying them to the CMS's theme system. Doing so requires a substantial amount of time and effort.

Castle CMS, however, presents no such challenge. It allows you to maintain the original source material that the designer created, and simply applies it to the content of the site. No dissecting code, no hassle. That's it.

The increased simplicity opens up a world of theming possibilities. A Castle CMS can be themed to match any existing website or webpage. You can even purchase themes online and apply those as well (from themeforest.net for example). If you love the way your current site looks but want to make the switch to Castle, you can do so without worry. You can even apply multiple themes within the same site if you need to. If your site holds portals to multiple departments, you can give each department and its subsequent pages their own unique theme.

Castle CMS has the ability to let you create complex layouts with the power of a few clicks. It allows you to apply any theme you desire to your website. The content itself has to live up to the same impressive standards, and with the right tools, you can spend more time making sure it does. That's why Castle CMS gives you the ability to edit text as easily as a word processor with rich content editing.

Rich Content Editing

Coding is something most of us don't know how to do. Many organizations can't rely on a systems engineer when they need a content update, nor should they. Castle CMS supports rich content editing with a state of the art editor called TinyMCE. It stands for Tiny Moxiecode Content Editor, but what it's called is less important than what it does for you.

This editor looks and feels like a word processor, giving you the ability to bold or italicize text, create bulleted lists, and change between body text and headings like we're all used to with products like Microsoft Word or Google Docs.

In the web development community, this kind of editor is called a "what you see is what you get" editor, or WYSIWYG. Because you type the words and format them exactly as you want them in the finished, live webpage. There's no messing around with HTML or JavaScript. Basically, a WYSIWYG editor takes what you write and turns it into HTML behind the scenes so that it can be read by browsers, but the user never need see the code behind the text.

WYSIWYG editing has become a must-have for organizations who need to update their website regularly, and the reason is pretty apparent. It's undeniably quicker and easier to click, type, and save than it is to make sure you've got code working right, even if it isn't the most complex thing.

One of the other brilliant features of Castle CMS's WYSIWYG editor is you can use it to edit content of a tile in-layout. It doesn't open a separate editing page, nor a separate text box. It appears right there, inside of the tile you're working on, meaning that what you see truly is what you get.

Awareness

Castle CMS isn't yesterday's content management system. It's a CMS for the future. And the future is best defined as a conversation, between everyone, all the time. As more businesses reach for the top of the search engine listings, you need to take advantage of every opportunity to get more exposure for your business. Castle CMS is here to help, first with extensive social media integrations.

Social Media Integration

In today's ever increasingly connected world at all hours of the day, social media is hosting hundreds of millions of conversations and interactions across the globe. If you're absent from social media, you're missing out on an immense amount of potential exposure. If you're an organization that's already on social media, great work! But, are you realizing the full power of social media? Castle CMS has built-in capabilities that allows you to do just that.

Castle CMS allows any organization to bring their social media accounts from whatever platform they utilize directly to their website. If your organization has a Facebook page, for example, you can display individual posts or the entire page on your site. Using tiles means you can drag and drop these feeds anywhere on the site.

Integration isn't just limited to Facebook. You can also add Twitter, Pinterest, or LinkedIn streams to the site as well. Do you have more than one account on a particular platform? Castle CMS allows you to display posts from as many accounts you have and from any of the supported platforms you use.

As an organization looking to improve your social media presence, you need a way for visitors to share your content with ease, and spread your name throughout their network. Castle CMS has built-in share buttons for Facebook, Twitter, Pinterest, and LinkedIn ready to be enabled with the flip of a virtual switch. What's more, these buttons can be placed as tiles, so you can drag and drop them to wherever you want on the page without messing around with the code or the theme. Conversely, if you decide you don't want the buttons on the page anymore, they can be removed just as easily as they were placed.

Why bother with all of this sharing? Aside from the immediate free exposure it gives your site and your organization, it also helps you check the exposure of your website for the long haul. Castle CMS checks the popularity of your content on all social media outlets. With that information, it can adjust internal search results to favor more popular posts on social media, making popular content easier to find for site visitors.

Social media is an incredibly effective way of increasing public awareness of your organization. Castle CMS's ability to allow you to echo your social media presence on your site amplifies that effect nicely. But that's not the only way people are going to be looking for you or your site. More often than not, when someone needs information, they turn to a search engine. We've already mentioned that social media integration will help increase search engine presence, but there's more to it than just that. Read on to see just how Castle CMS helps you master search engine optimization (SEO).
Search Engine Optimization (SEO)

As the internet continues to expand its seemingly endless reach and functionality, the difficulty of being seen increases right along side it. There are tens of millions of websites that populate cyberspace, and chances are there are at least thousands that represent something similar to yours. Search engines have long been an invaluable tool for navigating this new frontier and blocking out the noise of sites that aren't relevant to us.

With the internet becoming ever more crowded, though, a search engine won't help you stand out on its own. You need to take extra steps to ensure that your site is so well fitted to your topic and the terms associate with it that you can be on the very first page of search results: ideally, within the first 5 entries. These extra steps make up a process called search engine optimization (SEO), and Castle CMS has several ways of giving you every advantage it can.

Search engines prioritize website based on relevance to the search entered by a user. One of the main sets of criteria used to determine that relevance are bits of information called metadata in the form of metatags and keywords. Metadata in this sense is essentially more information that describes the pages and content on your site. It helps search engines determine what your pages are about. Your Castle CMS site automatically reads the metadata of all your site content and shows you where you could add more information to improve it for better search engine optimization.

In the past, it took a skilled programmer who knew their way around the insides of source code to ensure that the metatags and keywords of a site were optimized for the site's target audience and the terms they were searching. Now, Castle CMS does all of the heavy lifting for you. It takes the content that is on your page and determines its subject matter. Knowing that, it can develop effective keywords and metatags that will help your site climb in the search engine rankings.

There are several other factors that play into search engine rankings. One of the most important is the URL of a site. Search engines will prioritize links that have meaning to them, rather than a random assortment of numbers and letters. For example, if you were to search "how to build a website," a URL ending in ".com/how-to-build-a-website" would be more relevant to your search than ".com/ALK-423sllka42llkn123j," and therefore come up higher on your search results. Which one would you be more likely to click on?

If you're like most people, you'd probably pick the one that appears first. That's why Castle CMS creates context aware URLs for every page on your site. Using the same example, if your page is titled "How to Build a Website," the URL automatically generated by Castle CMS would be "yoursite.com/how-to-build-a-website." But maybe you want to shorten it? And you can, easily. You might want to change this one to "yoursite.com/build-a-website" for example. All it takes is two mouse clicks. Even though Castle CMS produces great links automatically, creative control is left in your hands. After all, even today, human intuition is still better than a computer's.

There's more to searching the web than just search engines. Websites with a lot of files and documents need a powerful internal search tool as well if you want your information to be easy to find. With all the metadata Castle CMS encourages, this internal search tool must be able to read and make sense of huge amounts of files and data. Castle's search tool does. In fact, it can search through millions of records in an instant.

Advanced Internal Search Tool

Searching for content on a Castle CMS site is arguably easier than anywhere on the internet. It's a big part of why it's so easy to increase your organization's reach and exposure through just your website. The reason why boils down to two factors: the highly specific data used to identify and index content as well as the search engine that's built into every Castle site.

Each piece of content has numerous bits of data associated with it like the title, subject matter, description, geographic location, the kind of file it is, and any body text included in the file itself. With all these identifiers, there are a lot of criteria the search engine can use to find and retrieve content for you when you search. This infrastructure is the backbone of a truly advanced search tool like this one.

You're probably used to using search engines like Google, where results are suggested in real time while you type, you can use different filters to help pare down your results, and results appear nearly instantly. Searching internally shouldn't have to be any different.

Castle CMS's search tool is integrated with a product called Elasticsearch, an extremely scalable and versatile search engine. Elasticsearch takes advantage of the numerous kinds of data applied to all your content to index everything, meaning you can narrow your search in a wide variety of ways that a lot of other search engines just aren't capable of.

When you start a search from the built-in toolbar, you'll immediately notice real-time suggestions that update while you type. This is called Livesearch. This feature helps get users from point A to B much faster, and it's more like what people have grown accustomed to. Users are comfortable with this kind of search, which means they are comfortable using your site.

With built-in content filters, you can limit your search to just images, pages, news items, events, forms, videos, or audio files. If you've got something specific in mind, this feature can really help to narrow down your results so you don't have to spend all your time digging through irrelevant content.

Once you find what you're looking for, you need an equally powerful tool to help you access and make sense of the files. That's where Castle CMS's document viewer comes in. We'll explore more of the ways specific data in your content helps make everything on your site more visible in the next section.

Document Viewer

Possibly one of our favorite parts about Castle CMS is the way it displays documents. Gone are the days of downloading files and needing a compatible program to view them. We've outfitted Castle CMS with a through-the-web document viewer that allows users to open files of many kinds from PDFs to Microsoft Office files and view them without downloading them.

Like many of Castle CMS's features we've talked about, the document viewer can be placed as a tile anywhere on the site. Once it's placed, you can upload any number of documents to it which are then accessible by a quick, dynamic search.

The document viewer also supports optical character recognition, or OCR. What does this mean? Let's say you've uploaded an image file, which might be a memo or a report that you scanned and saved on your computer. This kind of file doesn't have text that a computer can naturally recognize. So when you go to search for it later, using any of the body text in the search will turn up nothing. This is because none of the words inside the document can be read by the computer.

Fortunately, the CMS can analyze the file and automatically identify the text for you. All future searches will include the body text as well, making all your files easier to find, which extends even to search engines.

For example, once a document is OCR'd, you could search for all documents containing the number 2,000. Or, if you remember bits and pieces of sentences from a document but not the title, you can search with the words of a sentence to find it. It opens up a user's options immensely to find what they're looking for, and that makes it easy to navigate your site, even if you have thousands of files. It opens up your ability to share information and to get exposure for your organization.

One final word about documents on Castle CMS involves how they are stored. All large files, over a certain size, are automatically sent to Amazon Simple Storage Service, or Amazon S3, which keeps the main CMS database relatively uncluttered. This helps with the performance of the whole website and helps keep navigation as fast as it is.

Quality Assured Content

One of the greatest attributes of a CMS can also be one of its most risky: the ability to let several people manage the content of the site at will. Castle CMS has the ability to lock down permissions to prevent certain users from accessing off-limits areas and content, but what about the content they are allowed to edit? Are there safety nets against bad content? Maybe not on most CMS platforms, but there certainly are on Castle CMS. It all begins with the automated content quality checks feature.

Automated Content Quality Checks

Inline content suggestions make tweaking the text on your site easier than ever. Just like a word processing software, your site checks content for spelling and grammar errors as you write, right within your session. Instead of writing your content in a word processor and then copy and pasting it into your website, simply type and correct as you go. You'll find the editing process expedited, giving you more time to focus on your site as a whole.

Suggested content edits are automatically built into every Castle CMS site. Each time you make a change to a page on your site, you will be prompted by a window titled "Publishing Process." In this window, you will receive a small checklist of criteria that the software watches for. It will automatically look at the titles, summary, and headers to make sure that they are up to best practices. You'll see either a red 'x' if an error is detected, or a green check mark if it's okay. This prevents overlooking any mistakes, and helps your content maintain the highest standards.

In addition to the text itself, Castle CMS also checks for the content's relationship with other content. The "Publishing Process" window checks any links on your page and tells you if it's in working order or broken. Preventing broken or missing links makes for a far better experience for your audience when they visit your site, giving them a better opinion of your site and thus your message.

To ensure that everyone has the ability to access your website without issue, Castle CMS also checks for Section 508 compliance. Section 508 is a series of laws that exist to help people with disabilities. If you're unfamiliar with this regulation, odds are you aren't legally obligated to comply. Section 508 applies mostly to government websites, all of which must meet these requirements so that all citizens have fair access to information. However, it is good practice for all websites to meet these requirements, which is exactly why Castle CMS makes it so easy to meet them.

Other accessibility standards besides Section 508 include WCAG 2.0 (level AA), ATAG 2.0, and WIA-ARIA. Chances are you've heard of at least one of those, if you aren't obligated to comply with at least one. Castle CMS encourages best practices for meeting each of these standards, allowing you to keep your site compliant with any accessibility guidelines relevant to you.

These checks are not just limited to the text of your site, but other content like images as well. That's when the image deduplication ability of Castle CMS steps in. When your site starts to get large, it's easy to forget what's been put where, especially if you have multiple editors uploading files you aren't always aware of.

Image deduplication is a fancy way of saying you can't upload the same image twice. Let's be fair—everyone let's some details slip their minds sometimes. You may find an image that would be perfect for your site. The problem is, you forgot you already uploaded the same image six months ago. Don't sweat it. If you try to upload a duplicate image, Castle CMS gives you a notification so you don't end up using up unnecessary storage space and clogging up your folders with repetition.

Despite every protection in the world, making changes to your site can still feel daunting and intimidating. So far, we've demonstrated that Castle CMS can protect your content's integrity by not only limiting user access, but by monitoring the content itself. But how can you be absolutely sure that the content is going to look how you intended? How do you know that even with perfect content, it's going to look perfect? That's where Castle CMS's page preview feature will come in handy.

Page Preview

Page previews will give you the ultimate peace of mind. What better way to ensure your site will look right than by seeing it exactly as your visitors will—before any of your changes go live. No need to approach your editing with a trial and error approach, where you can only see errors once your audience can see them too.

Before you publish a page, it is in a "private" state. This means that you can change whatever you want, but the only people who can see the page, are those that are logged in and also have access to the page. In this way, you're able to continually make changes, both small and large, until you are 100% satisfied with the outcome. Play with wording and paragraph length, arrangement, attachments as many times as you need.

It is incredibly advantageous to check over your content and page layout to make sure it looks right

on your computer. But, how is it going to look when accessed by a smartphone or a tablet? Castle CMS has that covered, too. By choosing ‘preview’ from the side toolbar, you’ll open a pop-up window in your session that allows you to check compatibility for all devices. “Full size” for desktop screens, as well as “Tablet,” “Phablet,” and “Phone” options. You can be positive that your content will be accessible and appealing to anyone on any device.

Once you’re happy with your page, all it takes to publish is a few clicks. Simply click on the “state” item in your sidebar, and select “publish” and click “change.” Depending on your level of authorization, you may have to select “submit for publication” instead of outrightly publishing a page. This feature exists for certain workflows that require all content changes to be approved by authorized staff members.

You also may be interested in when a change was made, or by whom. And despite Castle CMS’s protections, people can still make mistakes. This is why Castle CMS ships with an audit log to keep track of all changes made to your site.

Audit Log

Every single time a change is made to any part of the site, the audit log takes note of what was changed, which user made that change, and when that change was made. It is all recorded chronologically in a list format under the “History” tab on the sidebar.

The audit log is paired with a version history feature. With version history, you can revert back to old versions quickly and easily. Say you’ve made several changes for a special event, and once it’s finished you want the site to just go back to the way it was originally. You’ve made enough changes for it to be difficult to remember them all, so all you need to do is go to the audit log. Go back to a previous version, and revert to that revision. Your site will be sent back to that state, and all of the changes you made will be undone.

If something were to be accidentally published, you can revert to an old state of the site quickly and without difficulty. Whether a user placed text on the wrong page or published private/sensitive information unintentionally, this helps your organization save itself from possibly critical missteps.

Being able to see which user made which change gives the owner the ultimate power of accountability. When there are several content editors at work, it would be easy to lose track of all the changes that are made were they not logged. This way, ownership of any critical mistake is always clear. There is no mystery of who did what.

Similar to the audit log, Castle CMS can be set to automatically archive content after a set period of time. If your organization is in the public sector or certain private sector industries, saving content in an archive is a legal requirement. Auto archiving will automatically take copies of your site, and send them off to cloud storage. Your site will seamlessly continue to serve the content as it is: the storage process won’t interrupt you in any way. You’ll always be able to access previous versions of your content for information requests, legal purposes, or general record keeping. What you’ve posted in the past will never be in question.

The audit log is a way for administrators to examine how your users are interacting with the site. Another important metric for planning the organization of your site is how the public interacts with

your site. Many organizations have used Google Analytics to see how many people are viewing their websites and how they are using the sites. You'll be happy to know that Google Analytics has been integrated directly with Castle CMS to provide all of your site's content analytics.

Content Analytics

Castle CMS integrates with Google Analytics straight out of its box. There is no setting that you have to adjust, no information you have to input, and no extra coding to enjoy the power of this feature. In the "Analytics" panel of your site, you'll be able to see large amounts of valuable usage data. Armed with the power of this data, you can optimize your site to help reach your audience as efficiently and effortlessly as you can.

Whether you want to see how many visitors regularly access your site, what device is most used, or which of your pages is viewed the most, it's easy to find out. With this information, you can better plan to improve your site in the future and follow the data to see what's working and what isn't.

Analytics are located in your sidebar, as easy to find as any other tool on the site. Once you open the analytics tool, Google Analytics data are automatically displayed for you. In the figures below, you'll see how analytics data is accessed and some of the options you can choose from. There are 20 dimensions to choose from, shown in here. There are also 12 different ways to aggregate the data to see how many "hits" your site has, how long a visitor spent on your site, and more.

Note that you can select real time, historical, or social data. We're also looking at "hits" which are the number of times a visitor accessed the site, and we've broken the data down by region, meaning what part of the world each visitor comes from. Notice you can select how many results are shown, which will determine the number of regions appear. You can also select the chart type, which is either bar graph or pie chart formats. Lastly you can select a specific date range for which the analytics will show.

Above are the various ways you can aggregate your data and the different dimensions you can select. These lists show up under the "Aggregate" and "Dimensions" drop down menus respectively. The data displayed in the chart will automatically reflect the settings you choose in these menus.

With all of this data integrated right into the CMS, it's easy to look for ways to improve how your site is being explored and measure how effective your improvements are.

Conclusion

In these five chapters, we have explored many of the ways Castle CMS makes managing the content on your site intuitive for all users from the toolbars to the integrations with analytics software, so you can focus on making your website the best it can be, not on struggling with a counterintuitive program.

In no way do we consider this list all-inclusive. The only way to discover what Castle CMS can really do is by getting into it and making a site of your own. There are live demos available upon request where Wildcard staff will walk you through some of the features we've talked about here, and many others we haven't mentioned. You'll get to see how they really work, and just how easy to use they really are.

You don't have to be a massive organization to benefit from all the tools and features of Castle CMS. While it was built to be scalable, it's a solution that works for any sized business, government, or non-profit.

If you want an easy to use content management system committed to the future of your organization, contact Wildcard Corp. today for a demo.

Logging in to Your Site

In order to create or make changes to your site you will need to obtain a username and password. This will generally come from your system administrator or a project manager. Along with your username and password you will receive a URL . Type this URL into the address bar in your browser and you will be taken to the login page. (See Figure 1)

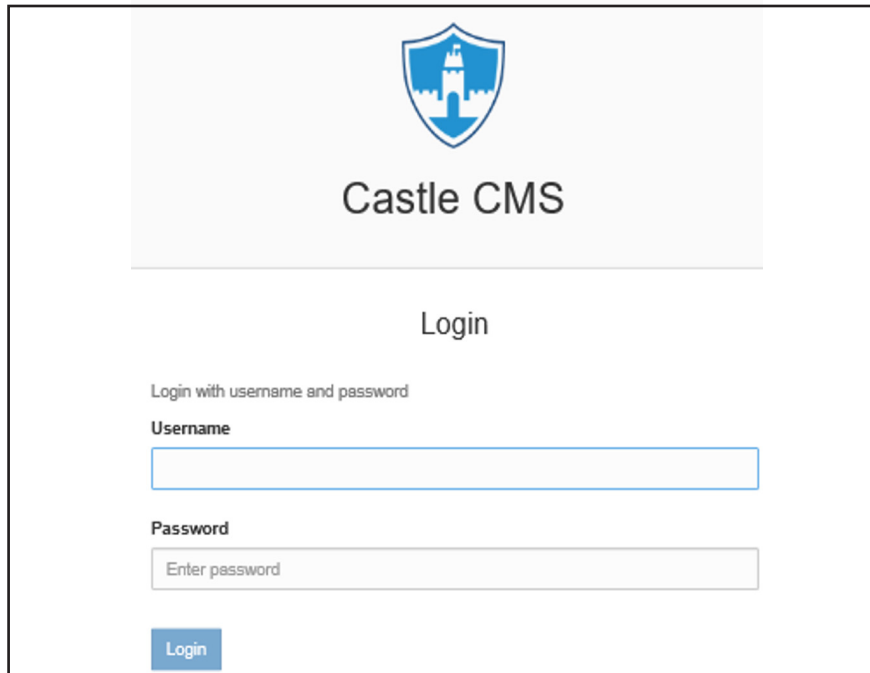
The image shows the login page for Castle CMS. At the top center is a blue shield logo with a white castle tower inside. Below the logo, the text "Castle CMS" is displayed in a large, black, sans-serif font. Underneath this, the word "Login" is centered in a smaller, black, sans-serif font. Below "Login" is the text "Login with username and password" in a small, gray, sans-serif font. This is followed by two input fields: the first is labeled "Username" in a small, black, sans-serif font, and the second is labeled "Password" in a small, black, sans-serif font. The password field has a placeholder text "Enter password" in a small, gray, sans-serif font. At the bottom left of the form is a blue button with the word "Login" in white, sans-serif font.

Figure 1

Enter your username and password. After logging in you will be at the Welcome Page. From here you will be able to start creating and editing your site.

When you are ready to log out click on your name in the top right hand corner of the page and select **Log out** from the drop down menu. (See Figure 2)

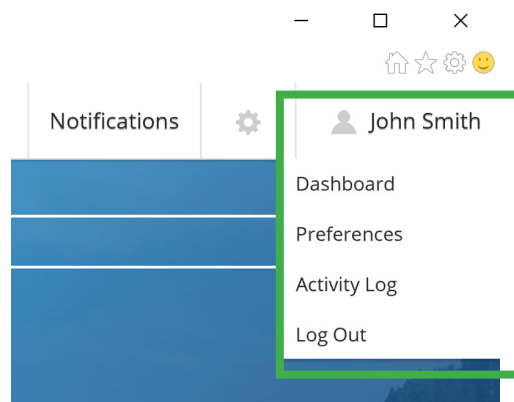


Figure 2

User Accounts and Permissions

How to see current users

What kind of changes you can do to your site will depend on the permissions associated with your user account. Click on the gear icon next to your name in the upper right hand corner to open the settings menu and choose **Site Setup** from the drop down list. (Figure 3)

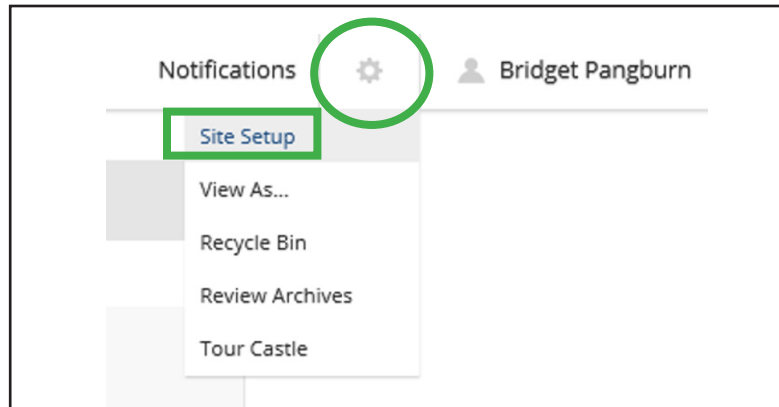


Figure 3

Scroll down until you see **Users** and click on the icon for **Users and Groups**. You will then see a list of all authorized users for this site, (Figure 4) You can also search for a specific user from this page.

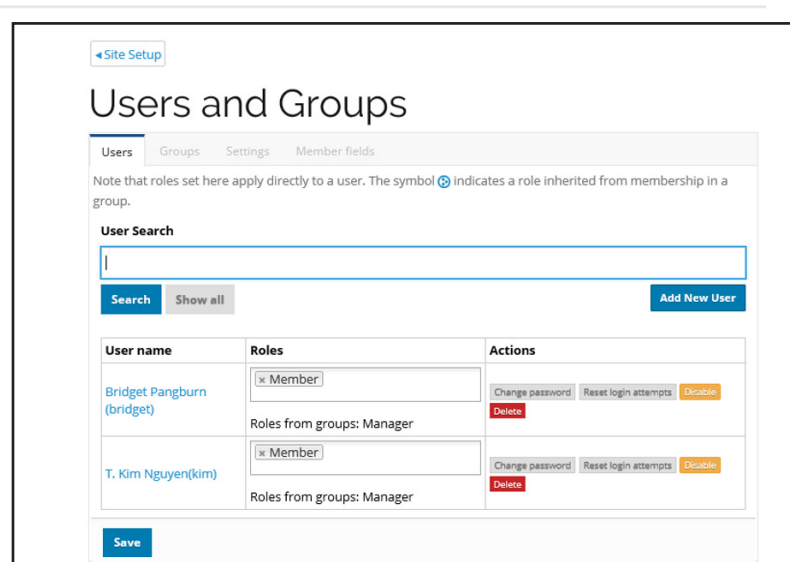


Figure 4

Note: Generally only a site administrator or project manager will have the ability to change user permissions.

The first column shows the user’s name and their username. The second column shows the roles that member holds. One user shown in this example has manager level permissions. The other is a standard user. The third column shows the actions an administrator can take for that user. Users can also be deleted from this list. (Figure 5)

User name	Roles	Actions
John Smith(jsmith)	<div><div>✕ Member</div></div> <div>Roles from groups: Reviewer Site Administrator Manager</div>	<div>Change password</div> <div>Reset login attempts</div> <div>Disable</div> <div>Delete</div>
Mary Jones(mjones)	<div><div>✕ Member</div></div>	<div>Change password</div> <div>Reset login attempts</div> <div>Disable</div> <div>Delete</div>

Figure 5

Adding users

You can add a user by clicking the **Add New User** button. (Figure 6)

◀ Site Setup


Users and Groups

Users

Groups

Settings

Member fields

Note that roles set here apply directly to a user. The symbol  indicates a role inherited from membership in a group.

User Search

Search

Show all

Add New User

Figure 6

This will bring you to a form where you can enter the information for the new user. The Email address and Username are the only required fields but you can enter as much or as little information as you would like. You can also set a password for the new account and send an email to the new user which contains a link to the password. At the bottom of this form you can add the new user to any groups that you would like to. When you are finished click the **Register** button at the bottom of the form. (See Figure 7 on the following page)

Figure 7

To see what permissions each user has you can click on the **Groups** tab. (Figure 8) This will bring up a list of all of the user groups for the site and what permissions each level of user has. (Figure 9)

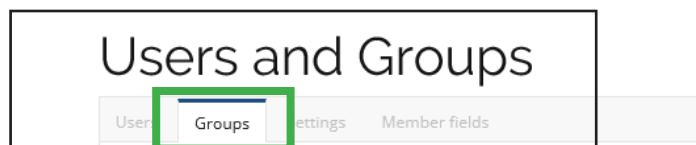


Figure 8

Group Name	Contributor	Editor	Member	Reader	Reviewer	Site Administrator	Manager	Remove
Administrators	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Authenticated Users (Virtual Group) (AuthenticatedUsers)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reviewers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Site Administrators	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Figure 9

If you want to know which users are in a certain group, click on the name of the group. You will then see a list of all of the users in that group. From this list you can remove users from the group. You can also click on the **Group Properties** tab to edit the properties of the selected group. (Figure 10)

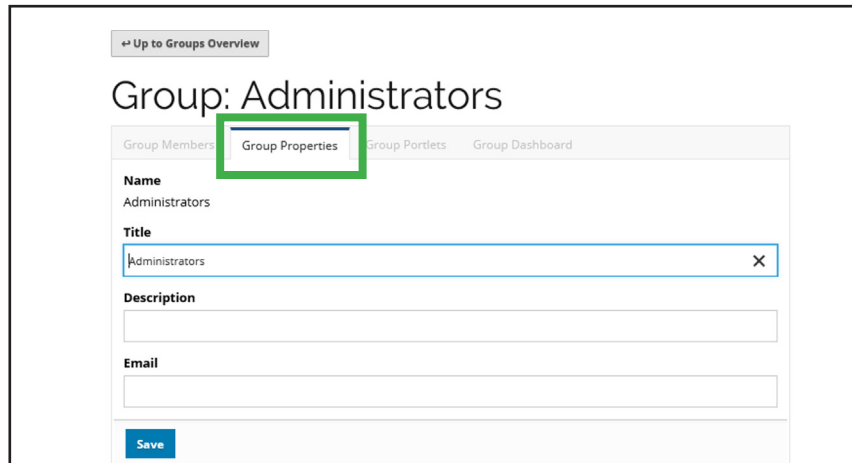
The screenshot shows a web interface for managing groups. At the top, there is a link 'Up to Groups Overview'. Below it, the title 'Group: Administrators' is displayed. A tabbed interface is shown with four tabs: 'Group Members', 'Group Properties' (which is highlighted with a green box), 'Group Portlets', and 'Group Dashboard'. The 'Group Properties' tab is active, showing a form with fields for 'Name' (Administrators), 'Title' (Administrators), 'Description', and 'Email'. A 'Save' button is at the bottom left of the form.

Figure 10

You can edit the information that appears in the user list. For example if you wanted the phone numbers of the users to appear in the user list you would click on the **Member Fields** tab which brings up all of the default user fields Castle CMS offers. (Figure 11)

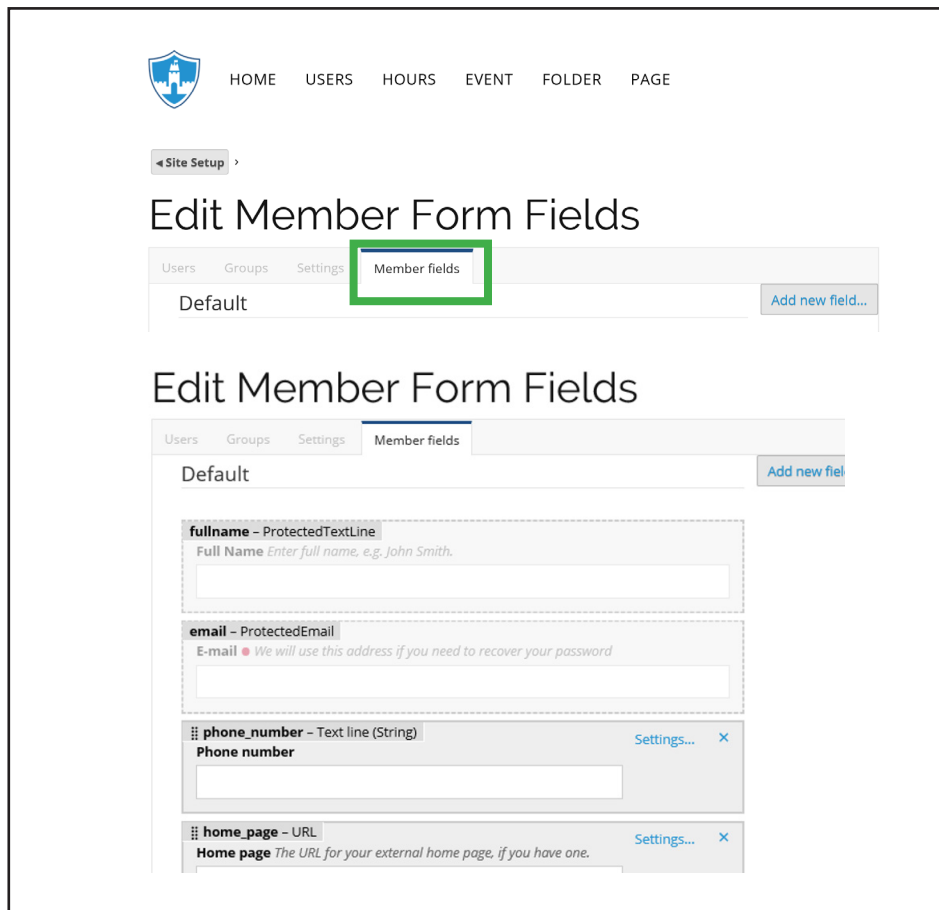
The screenshot shows a web interface for editing member form fields. At the top, there is a navigation bar with links: HOME, USERS, HOURS, EVENT, FOLDER, PAGE. Below it, there is a 'Site Setup' link. The main title is 'Edit Member Form Fields'. A tabbed interface is shown with four tabs: 'Users', 'Groups', 'Settings', and 'Member fields' (which is highlighted with a green box). The 'Member fields' tab is active, showing a form with fields for 'fullname - ProtectedTextLine', 'email - ProtectedEmail', 'phone_number - Text line (String)', and 'home_page - URL'. Each field has a 'Settings...' link and an 'X' icon. A 'Default' label is at the top left of the form, and an 'Add new field...' button is at the top right.

Figure 11

Click on **Settings** in the upper right corner of the phone number field. (Figure 12)

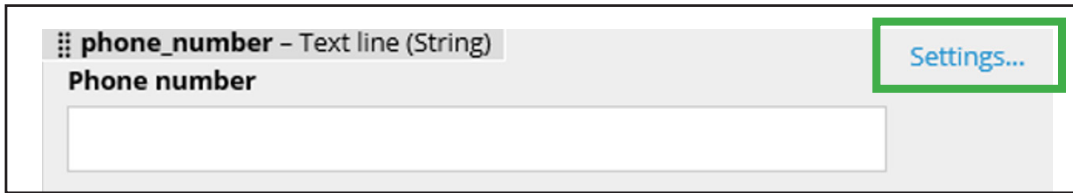


Figure 12

This brings up the **Edit Field 'phone_number'** form. Fill in the desired information and click **Save**. (Figure 13)

Figure 13

Note: If you want the new field to show up as part of the registration for the new user then you must check the **On Registration** box under “Where should this field be shown”. Otherwise the new field will only be shown on the user profile. See Above.

You can also add a custom field by clicking the **Add New Field** button in the upper right corner of the **Edit Member Forms Field**. (Figure 14)

Figure 14

You will see the **Add New Field** form. You must fill in Title, Short name, Field Type, and Where should this field be shown. When you are finished click **Add** and your custom field will appear in the **Edit Member Form Fields** page. (Figure 15)

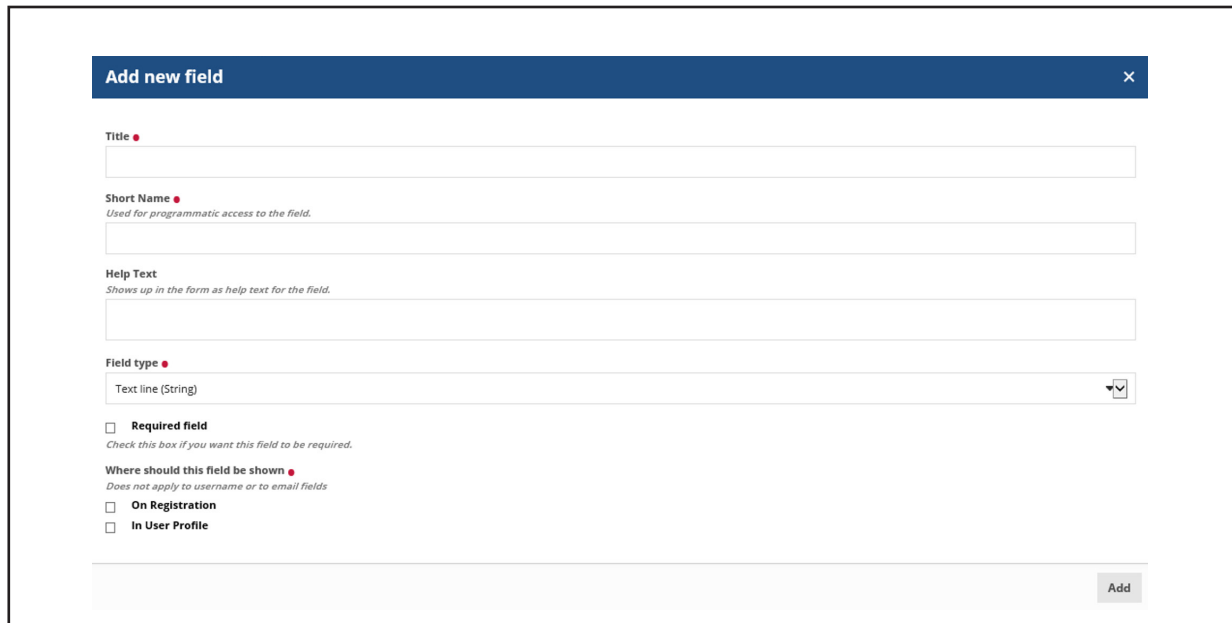
The image shows a modal window titled "Add new field" with a close button (X) in the top right corner. The form contains several input fields: "Title" (required), "Short Name" (required, with a note "Used for programmatic access to the field."), "Help Text" (with a note "Shows up in the form as help text for the field."), and "Field type" (a dropdown menu currently showing "Text line (String)"). Below these are two checkboxes: "Required field" (with a note "Check this box if you want this field to be required.") and "Where should this field be shown" (with a note "Does not apply to username or to email fields"). Under the second checkbox are two options: "On Registration" and "In User Profile". An "Add" button is located at the bottom right of the form.

Figure 15

You can see the user profile of a specific user by clicking on the **Users** tab on the **Users and Groups** page and clicking on the name of the user you would like to view. The **Personal Information** contains information such as name, E-mail address, and phone number. (Figure 16)

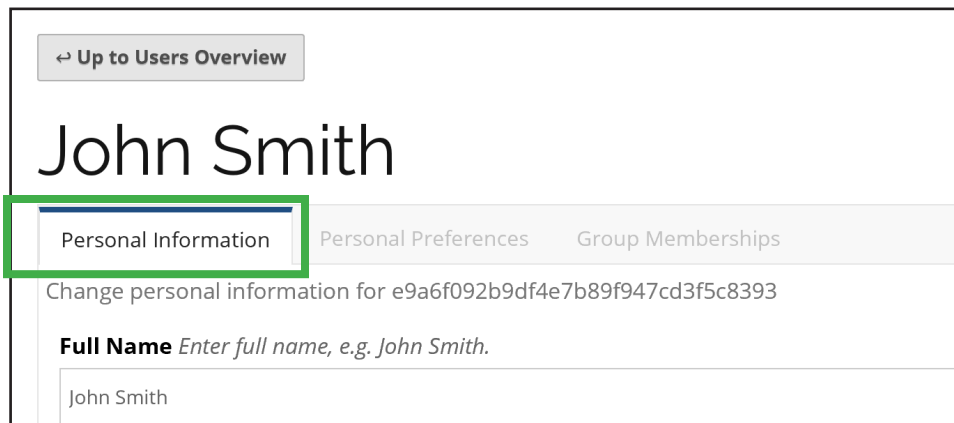
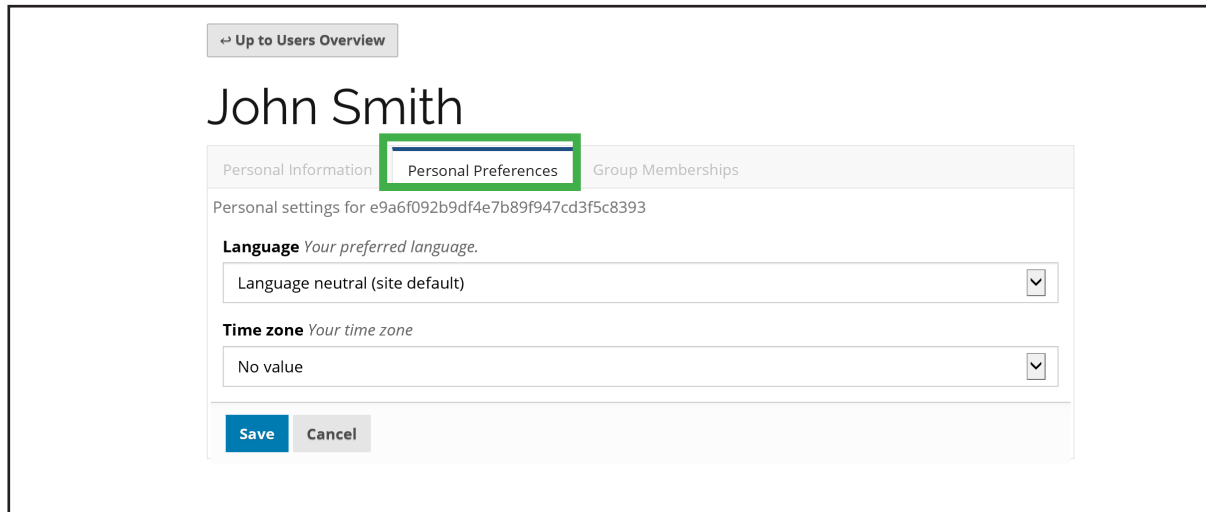
The image shows a user profile page for "John Smith". At the top left is a button labeled "Up to Users Overview". Below the name "John Smith" are three tabs: "Personal Information" (highlighted with a green box), "Personal Preferences", and "Group Memberships". Below the tabs is a heading "Change personal information for e9a6f092b9df4e7b89f947cd3f5c8393". Under this heading is a form field for "Full Name" with a placeholder "Enter full name, e.g. John Smith." and the text "John Smith" entered.

Figure 16

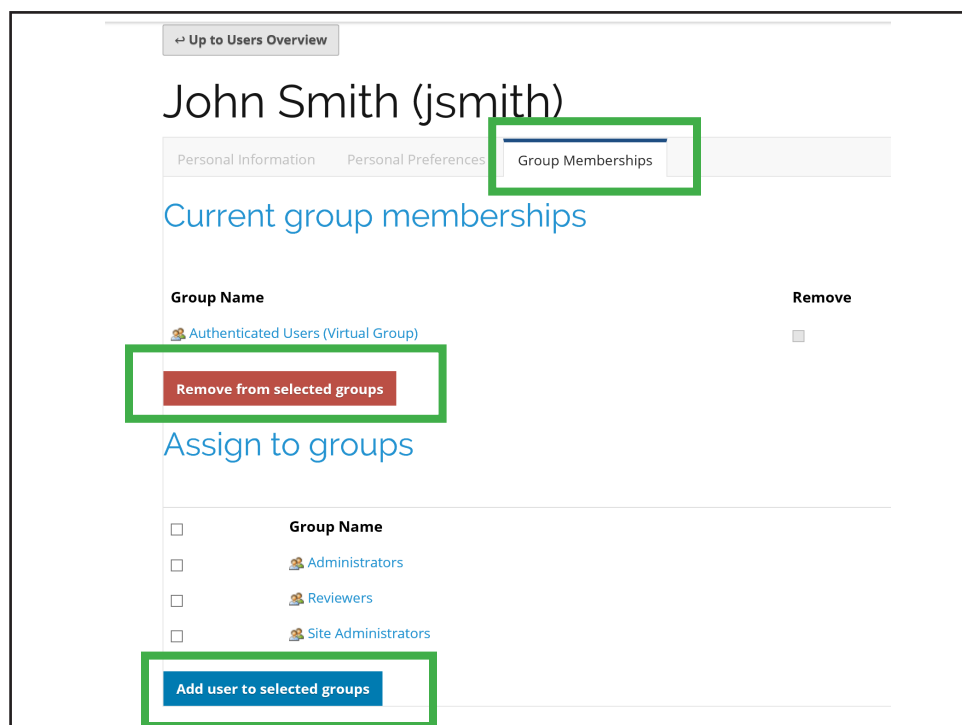
You can set the language and time zone preferences for the user from this page by clicking on the **Personal Preferences** tab. (Figure 17)



The screenshot shows the user profile page for John Smith. At the top, there is a link "Up to Users Overview". Below the name "John Smith", there are three tabs: "Personal Information", "Personal Preferences" (which is highlighted with a green box), and "Group Memberships". Under the "Personal Preferences" tab, the text "Personal settings for e9a6f092b9df4e7b89f947cd3f5c8393" is displayed. There are two settings: "Language" with the description "Your preferred language." and a dropdown menu showing "Language neutral (site default)"; and "Time zone" with the description "Your time zone" and a dropdown menu showing "No value". At the bottom of the settings section are "Save" and "Cancel" buttons.

Figure 17

The **Group Membership** tab shows you what groups that user is a member of. You can also **Add the user to** or **Remove** the user from groups. (Figure 18)



The screenshot shows the user profile page for John Smith (jsmith). At the top, there is a link "Up to Users Overview". Below the name "John Smith (jsmith)", there are three tabs: "Personal Information", "Personal Preferences", and "Group Memberships" (which is highlighted with a green box). Under the "Group Memberships" tab, the text "Current group memberships" is displayed. There is a table with two columns: "Group Name" and "Remove". The first row shows "Authenticated Users (Virtual Group)" with a "Remove" button. Below the table, there is a red button "Remove from selected groups" (highlighted with a green box). Underneath, the text "Assign to groups" is displayed. There is a list of groups with checkboxes: "Administrators", "Reviewers", and "Site Administrators". At the bottom, there is a blue button "Add user to selected groups" (highlighted with a green box).

Figure 18

Getting Started with Castle CMS

You have just gotten your Castle CMS install finished and now you want to know where to start. The best way would be to draw out an organizational chart or an outline for your site.

We are going to set up a site for the Black Cat Company. First we need to decide what are the information we want to give to people about our company through our website.

To keep this simple we are going to go with:

1. Hours
2. Events

First you need to log in to your website. For this section we will assume that you begin from a home page that already has your company theme set up. You will see two toolbars on this page. The **top toolbar** shows notifications for any messages or changes you make to the site, the settings button, and your login name. There is also a **toolbar on the left side** to the screen which will be used to create and edit your site. Later in this manual we go into detail about each of these but for now just know there are there. (Figure 1)

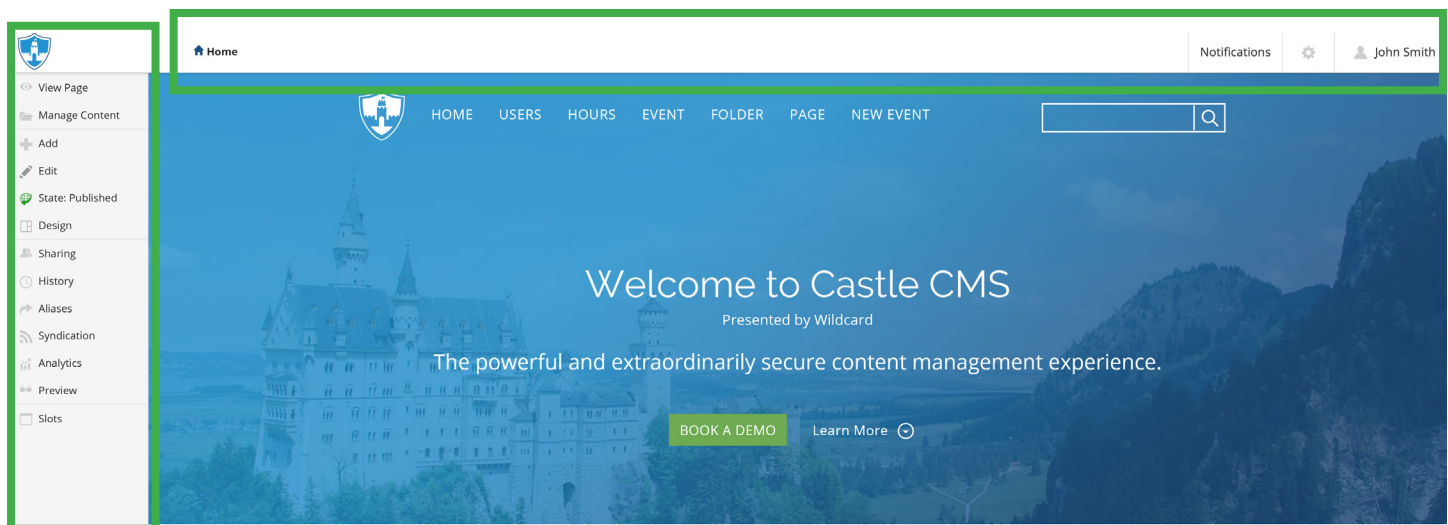


Figure 1

To begin setting up your site we will be creating a page and an event. (Figure 2)

1. Click on the **Add** button from the left toolbar.
2. Click on **Page**
3. Fill in the **title** of your new page.
4. Click the **Create and Edit** button.

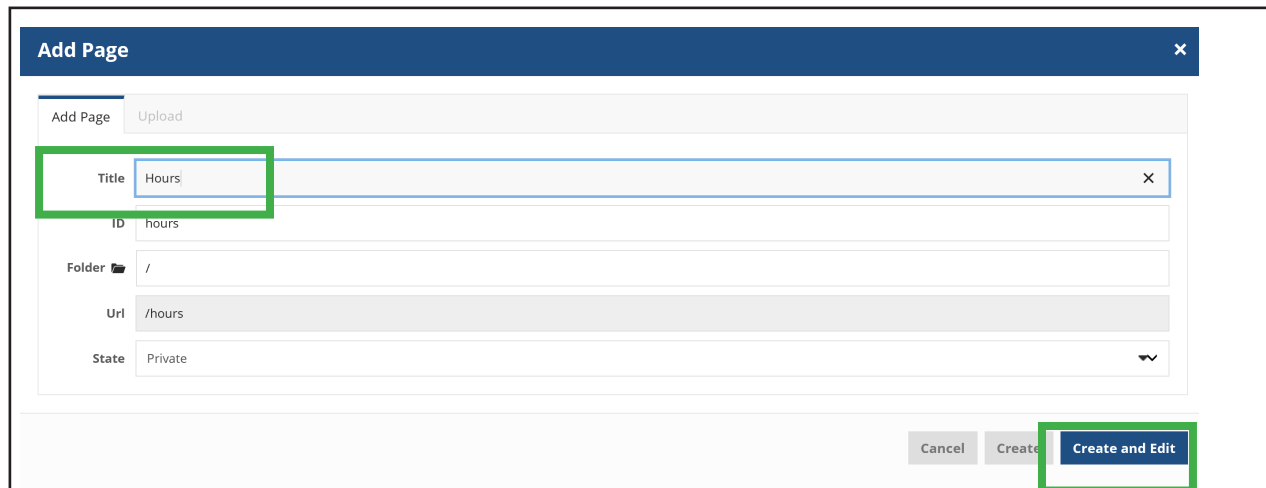


Figure 2

You are now looking at your page in edit mode. From here you can add content to the page. Three tiles appear on this page by default, **Title**, **Description**, and **Text**. The Title tile is already filled with the title you used when you created the page. (Figure 3)

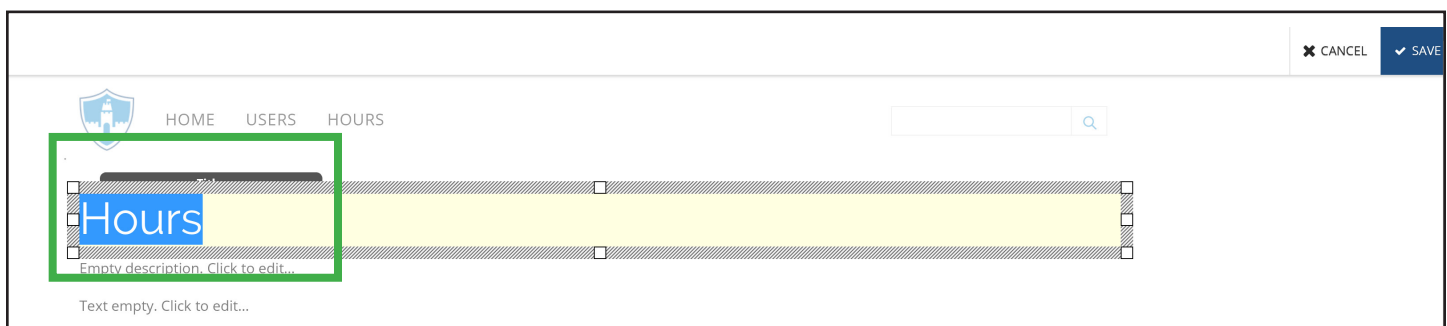


Figure 3

Type the open hours into the text box. You can format the text in the box with the **TinyMCE toolbar** above the box. (Figure 4) We go into more detail about this toolbar in a later chapter.

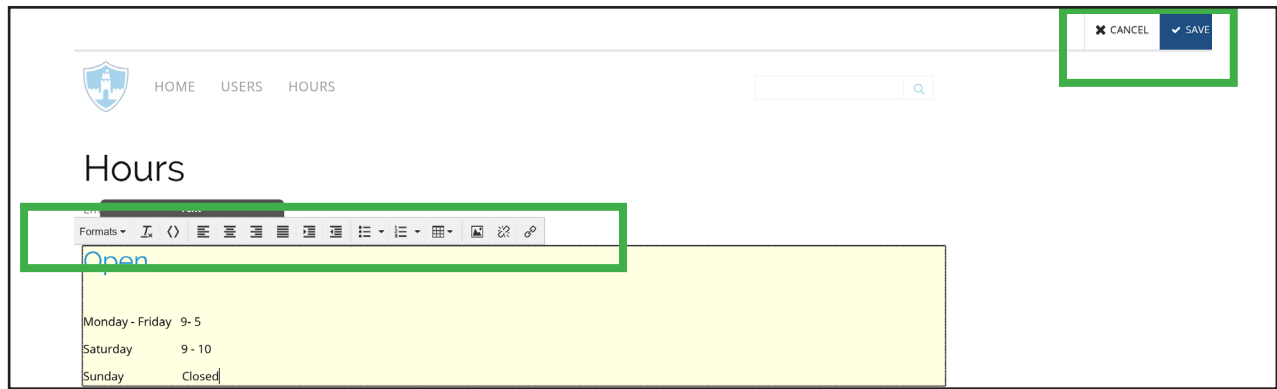


Figure 4

Click the **Save** button. You have now added a page to to your site.

Now we will add an event to your site. (Figure 5)

1. Click on the **Add** button from the left toolbar.
2. Choose **Event** from the Add pop up menu
3. Fill in the title of your event in the **Add Event** pop up menu.
4. Click the **Create and Edit** button.

Figure 5

You will then see the **Edit Event** form. Here you can fill in all of the important information for your event. When you have added all of the information you want to click the **Save** button at the bottom of the page. (Figure 6)

The screenshot shows the 'Edit Event' interface in Castle CMS. At the top, there is a navigation bar with a castle icon and links for HOME, USERS, HOURS, and EVENT. The main heading is 'Edit Event', followed by the text 'Events can be shown in calendars.' Below this is a tabbed interface with 'Default' selected, and other tabs for 'Categorization', 'Dates', 'Ownership', and 'Settings'. The form fields include: 'Title' (with a red dot icon) containing 'Event'; 'Summary' (with a red dot icon and subtitle 'Used in item listings and search results.') which is empty; 'Event Starts' (with a red dot icon and subtitle 'Date and Time, when the event begins.') containing 'July 21, 2017' and '2:00 p.m.'; 'Event Ends' (with a red dot icon and subtitle 'Date and Time, when the event ends.') containing 'July 21, 2017' and '3:00 p.m.'; 'Whole Day' (checkbox) with subtitle 'Event lasts whole day.'; 'Open End' (checkbox) with subtitle 'This event is open ended.'; 'Recurrence' (with a red dot icon and subtitle 'Define the event recurrence rule.') showing 'Add Does not repeat'; 'Location' (with a red dot icon and subtitle 'Location of the event.') which is empty; and 'Change Note' (with a red dot icon and subtitle 'Enter a comment that describes the changes you made.') which is empty. At the bottom, there are 'Save' and 'Cancel' buttons. The 'Save' button is highlighted with a green rectangular box.

Figure 6

You have now added an event to your site.

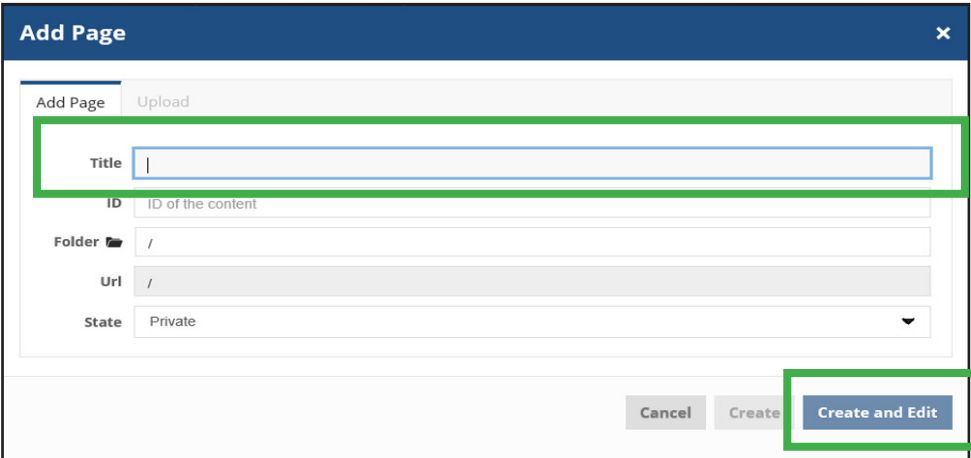
This is just the very basics of what you can do with Castle CMS to get you started working with the program.

Adding Content to Your Site

Adding new content to your site with Castle CMS is very simple. Click on the Add button from the left side toolbar and choose the type of content you would like to add. This section will take you through how to add pages, images, events, news items, folders, and links to your site.

Adding Pages

1. Click the **Add** button from the left side toolbar and choose page.
2. Fill in the **title** of the page you would like to add and click the **Create and Edit** button in the bottom right corner of the popup menu. (Figure 1)



The screenshot shows a modal window titled "Add Page" with a close button in the top right. Inside the modal, there are two tabs: "Add Page" (selected) and "Upload". Below the tabs, there is a form with the following fields: "Title" (a text input field), "ID" (a text input field with the label "ID of the content" below it), "Folder" (a dropdown menu showing "/"), "Url" (a text input field showing "/"), and "State" (a dropdown menu showing "Private"). At the bottom right of the modal, there are three buttons: "Cancel", "Create", and "Create and Edit". The "Title" field and the "Create and Edit" button are highlighted with green boxes.

Figure 1

3. You will then have a page that shows the Title, Description, and Text tiles showing. You can fill in as much or as little of this information as you would like. You generally want to fill in as much information as possible as this makes your site more likely to come up in a general search.
4. When you are finished with your changes click the **Save** button in the upper right corner and your new page will be added to the site. A link to the page will also show up on the menu bar on the top of the page.

If you decide that you do not want to add the page you can click the **Cancel** button and your work will be deleted.

If you want to go back later and make changes this can be done by using the **Edit** button from the left side toolbar on the Welcome page. Editing will be discussed later in this guide.

Adding an Image

You can add images to your site by creating and placing an image tile. To do this choose the page you would like to add an image to and click the **Edit** button from the left side toolbar. You are now in edit mode. Click **Insert** from the top toolbar then click **image** from the Media menu. (Figure 2)

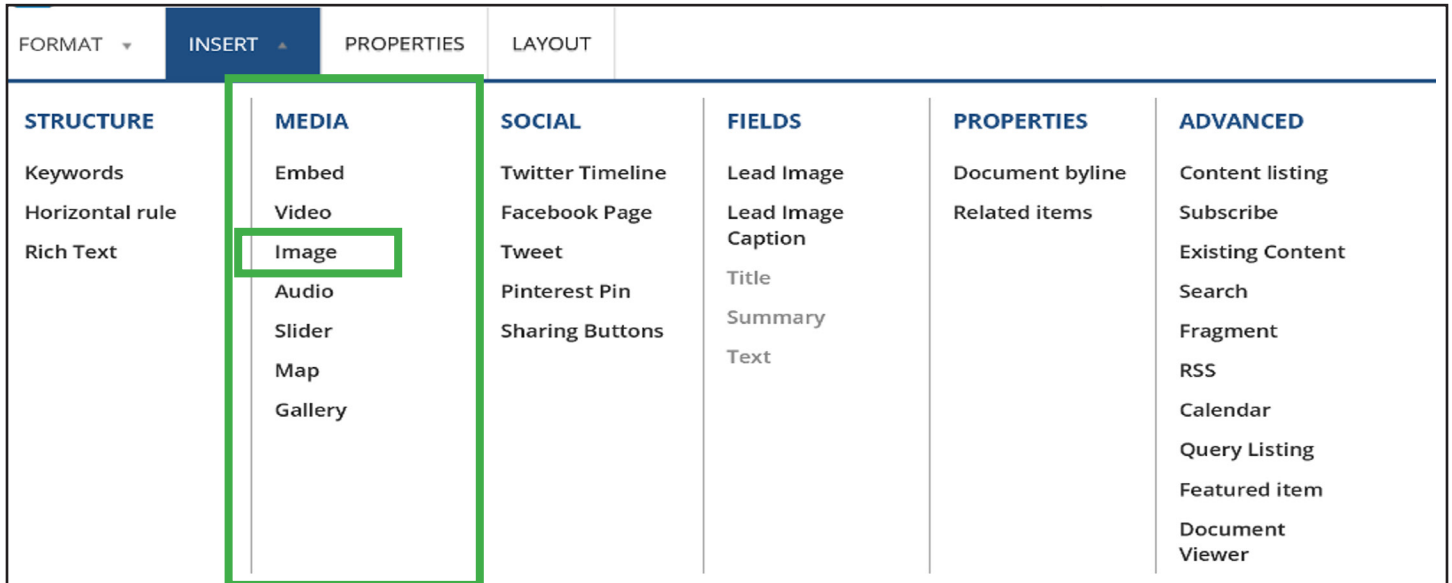


Figure 2

You will then see the **Add Image** popup menu. (Figure 3)

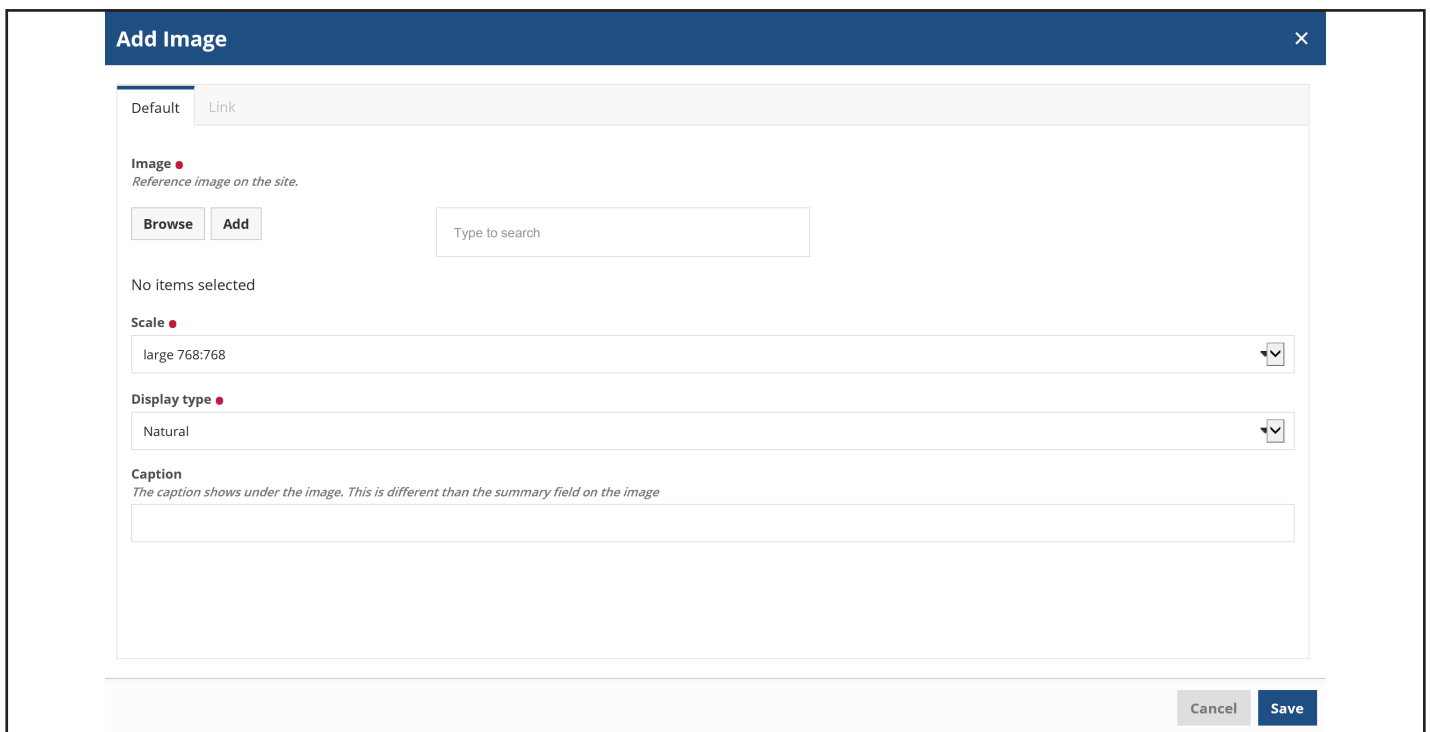


Figure 3

There are a few ways to find the image you wish to use:

1. You can click the **Browse** button to search the image repository which will contain any images already in use on the site.
2. The **Add** button is used to upload an image file from your computer.

If you choose the **Add** button you need to upload the file into your image repository:

1. Click **Add** and either drag and drop the file you want to use into the box or click the **Select Files** button.
2. Once you find the file you are looking for click on that file and click the **Open** button.
3. Give the file a title and you may add a summary or tags if you desire. You can use the **Edit** button to rotate the image.
4. When you are happy with your image click the **green check** mark to upload it. Then click **Done**. (See Figure 4)

Figure 5

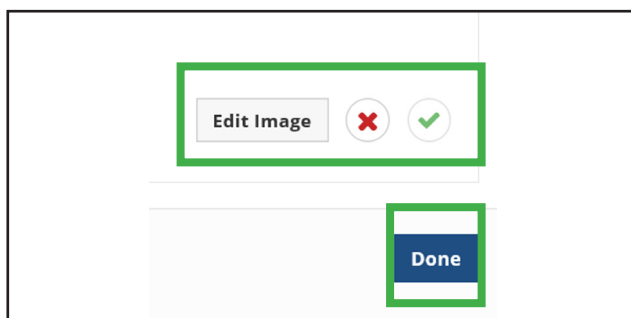


Figure 4

3. You can use the **Search** by typing the name of the file into the box. This will only search your current image repository.

Using the **Add Image** popup menu you can change the size and display type of the image. You can also add a caption. (Figure 5)

Scale ●
large 768:768
Display type ●
Natural
Caption
<i>The caption shows under the image. This is different than the summary field on the image</i>

Figure 5

You can add a related link to the image by clicking the **Link** tab in the **Add Image** popup menu. (Figure 6)

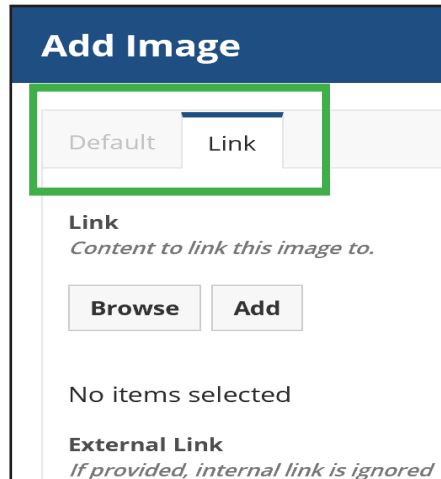


Figure 6

1. Click **Save** and you will have a tile containing your image that you can place onto your page.
2. Place the image where you want it to go on the page and click once. Your image will be placed on the page. Make sure to place the image in the space between any header or footer.
3. Click the **Save** button in the top right corner.
4. If you do not like the placement of the image you can click the **Edit** button at the bottom of the tile which will return you to the popup menu or you can click **Delete** which will completely remove the image. (Figure 7)



Figure 7

Adding an Event

If you want to add an event that your group or organization is holding to your website you can do so by clicking on the **Add** button from the left side toolbar and choosing **Event** from the **Add** popup menu. (Figure 8)

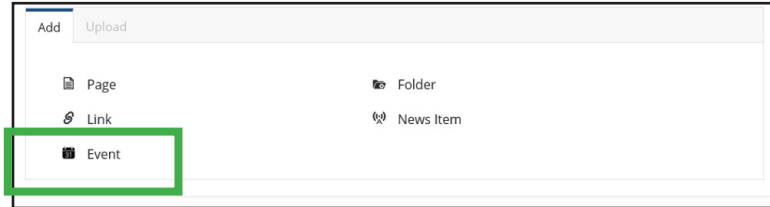


Figure 8

This will bring up the **Add Event** popup:

1. Give your event a title.
2. If you are using a folder organization system you can specify the folder for this event. All items are default set to a state of Private. Depending on your user permissions you may have to submit items to an administrator for them to be published.
3. Then click **Create and Edit**. (Figure 9)

A screenshot of the 'Add Event' form. The form has a title bar with 'Add Event' and a close button. Below the title bar, there are two tabs: 'Add Event' and 'Upload'. The 'Add Event' tab is active. The form contains several input fields: 'Title' (a text input field), 'ID' (a text input field with the placeholder 'ID of the content'), 'Folder' (a text input field with a folder icon and the placeholder '/'), 'Url' (a text input field with the placeholder '/'), and 'State' (a dropdown menu with 'Private' selected). At the bottom right of the form, there are three buttons: 'Cancel', 'Create', and 'Create and Edit'. The 'Create and Edit' button is highlighted with a green rectangular box.

Figure 9

You will see the **Edit Event** form. Enter all of the information about your event here. The fields marked with red dots are required fields. Most of the important information for the event is covered under the default tab on the edit event form including dates of the event and contact information. (Figure 10)

The screenshot shows the 'Edit Event' form with the 'Default' tab selected. The form includes a title field with 'Wine Tasting', a summary field with 'Taste and rate different wines', and event start/end date and time fields. The 'Event Starts' field is set to June 13, 2017, at 4:00 p.m., and the 'Event Ends' field is set to June 13, 2017, at 5:00 p.m. The 'Dates' tab is highlighted with a green box.

Edit Event

Events can be shown in calendars.

Default Categorization Dates Ownership Settings

Title •
Wine Tasting

Summary *Used in item listings and search results.*
Taste and rate different wines

Event Starts • *Date and Time, when the event begins.*
June 13, 2017 4:00 p.m.

Event Ends • *Date and Time, when the event ends.*
June 13, 2017 5:00 p.m.

Figure 10

The **Dates** tab allows you to set a publishing and expiration date for the event so that it will not show up in searches before you want it to or after the event has already happened. (Figure 11)

The screenshot shows the 'Edit Event' form with the 'Dates' tab selected. The 'Publishing Date' field is set to June 13, 2017, at 4:15 p.m., and the 'Expiration Date' field is set to June 17, 2017, at 11:05 p.m. The 'Dates' tab is highlighted with a green box.

WINE TASTING

Edit Event

Events can be shown in calendars.

Default Categorization **Dates** Ownership Settings

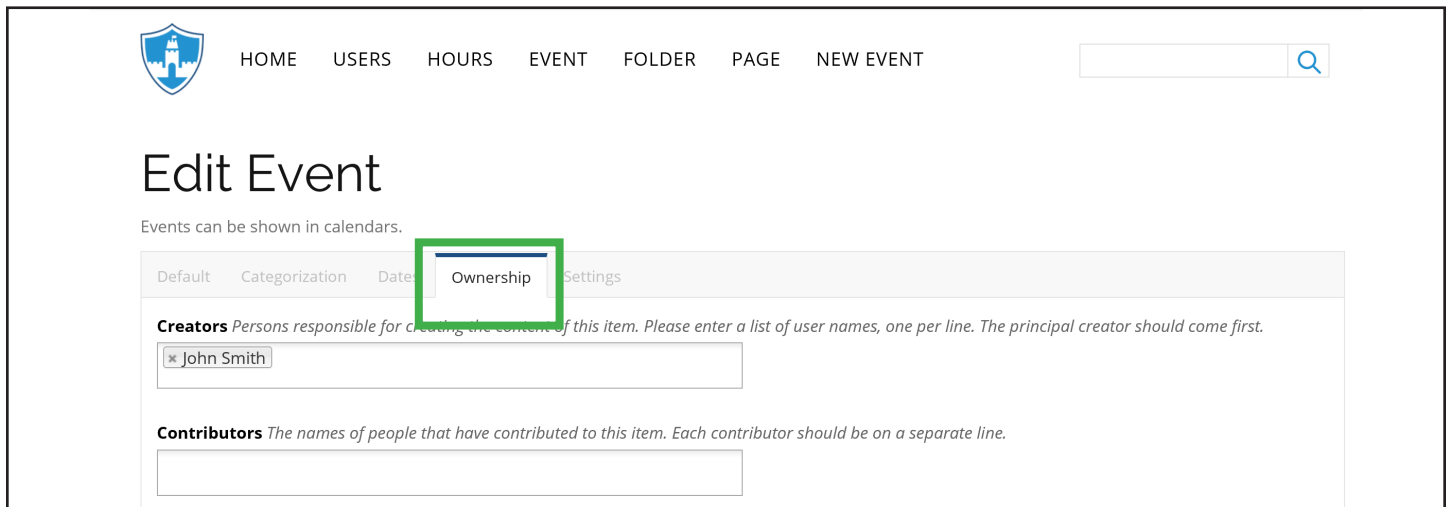
Publishing Date *If this date is in the future, the content will not show up in listings and searches until this date.*
June 13, 2017 4:15 p.m.

Expiration Date *When this date is reached, the content will no longer be visible in listings and searches.*
June 17, 2017 11:05 p.m.

Save Cancel

Figure 11

The **Ownership** tab shows the creator of the event and any other contributors. This is also where any copyrighted information can be cited. (Figure 12)



The screenshot shows the 'Edit Event' form with the 'Ownership' tab selected. The tab is highlighted with a green box. The form includes a navigation bar with links: HOME, USERS, HOURS, EVENT, FOLDER, PAGE, and NEW EVENT. Below the navigation bar is a search bar. The main heading is 'Edit Event'. Below the heading is a subheading 'Events can be shown in calendars.' The form has four tabs: Default, Categorization, Dates, and Ownership (selected). The 'Ownership' tab contains two sections: 'Creators' and 'Contributors'. The 'Creators' section has a text input field with 'John Smith' entered. The 'Contributors' section has an empty text input field.

Figure 12

The **Settings** tab allows you to set whether or not discussion is allowed on the site about this event. You can also choose whether you want the event to show in the navigation tree. (Figure 13)



The screenshot shows the 'Edit Event' form with the 'Settings' tab selected. The tab is highlighted with a green box. The form includes a navigation bar with links: HOME, USERS, HOURS, EVENT, FOLDER, PAGE, and NEW EVENT. Below the navigation bar is a search bar. The main heading is 'Edit Event'. Below the heading is a subheading 'Events can be shown in calendars.' The form has four tabs: Default, Categorization, Dates, and Ownership. The 'Settings' tab is selected and highlighted with a green box. The 'Settings' tab contains two sections: 'Allow discussion' and 'Exclude from navigation'. The 'Allow discussion' section has a dropdown menu with 'No value' selected. The 'Exclude from navigation' section has a checkbox labeled 'Exclude from navigation' which is unchecked. Below the checkbox is a text input field with 'wine-tasting' entered.

Figure 13

When you are finished click the **Save** button at the bottom of the form. The **Save** button appears on all of the editing tabs and clicking on it on any page will save the event to your site.

If at a later time you decide that something needs to be changed with the event just navigate to that event and click the **Edit** button on the left side toolbar. You will then be taken back to the **Edit Event** form where you can make your changes. Remember to click the **Save** button after you have made your changes.

Adding a News Item

A news Item is news information that you think your website viewers might be interested in or is in some way related to your site.

To add a news item to your site click on the **Add** button in the right hand toolbar and it will bring up the **Add News Item** form. (Figure 14)

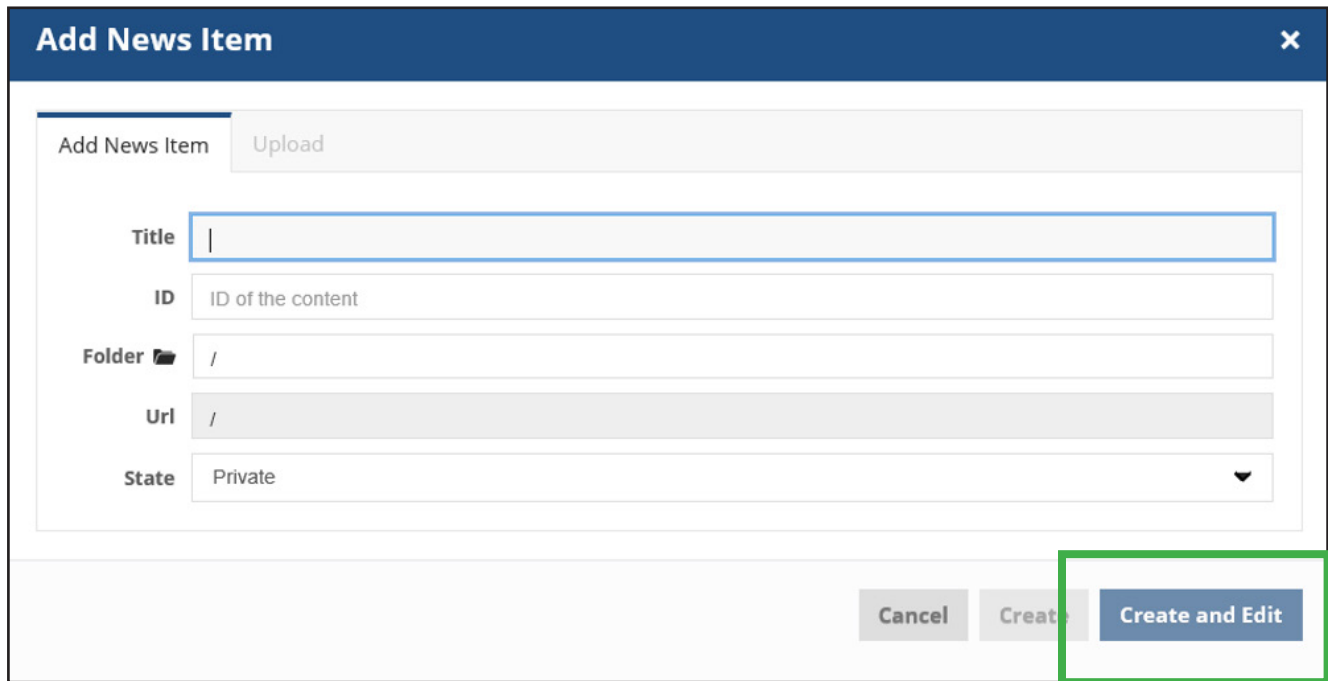
The image shows a modal window titled "Add News Item" with a close button (X) in the top right corner. Inside the modal, there are two tabs: "Add News Item" (selected) and "Upload". Below the tabs, there are several input fields: "Title" (a text box with a cursor), "ID" (a text box with the placeholder "ID of the content"), "Folder" (a text box with a folder icon and a slash), "Url" (a text box with a slash), and "State" (a dropdown menu with "Private" selected). At the bottom right of the modal, there are three buttons: "Cancel", "Create", and "Create and Edit". The "Create and Edit" button is highlighted with a green rectangular box.

Figure 12

1. Fill in your title.
2. Click the **Create and Edit** button in the lower left corner of the form. You will be taken to a page in edit mode. There are tiles for Title, Description, any other text you may want to add to the page already placed on the page. (Figure 14)
3. Fill in the information you would like your site users to see about the news item.

The image shows a web page in edit mode. At the top, there is a navigation bar with links: "HOME", "USERS", "MY FAVORITE WINES", "WHERE TO FIND THE BEST WINE IN WISCONSIN", and "GROUP THERAPY". Below the navigation bar, there are two more links: "WINE TASTING" and "WINE PRODUCTION". The main content area has a yellow background. There are three text boxes in the main content area, each with a green rectangular box around it. The first text box is labeled "Title" and is empty. The second text box is labeled "Empty description. Click to edit..." and is empty. The third text box is labeled "Text empty. Click to edit..." and is empty.

Figure 14

When you have finished editing your page click the **Save** button at the top left corner of the page. If you do not want to save you changes you can click the **Cancel** button. (Figure 15)

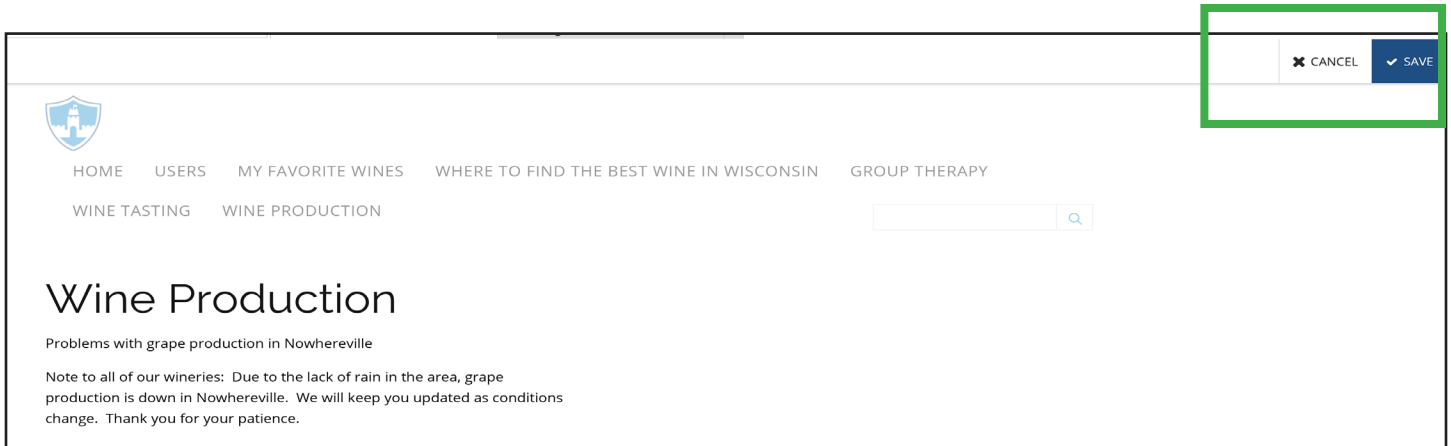


Figure 15

Adding Folders

Creating folders is a way of organizing your site. Think of it like a filing cabinet for the content on your site. Your site is the cabinet. Your main navigation points are the folders. The content related to each main topic are the papers or other folders kept in that main file.

1. To create the top level folder click on the **Add** button on the right hand toolbar.
2. Choose **Folder** from the popup menu. (Figure 16)

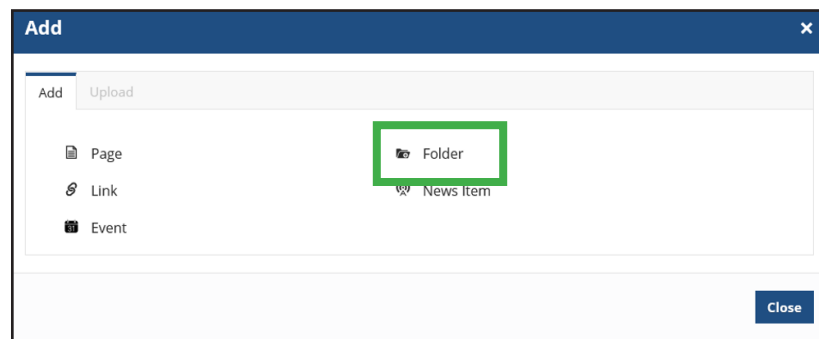


Figure 16

This will bring up the **Add Folder** menu. You will want to give this folder a descriptive name as it will be the one that shows up in the top Navigation bar. For example you could use something like up-coming events. In this example I am making a wine website so I used Where to find the Best Wines. This then shows up as your link to the folder in the Navigation Bar. (Figure 17)

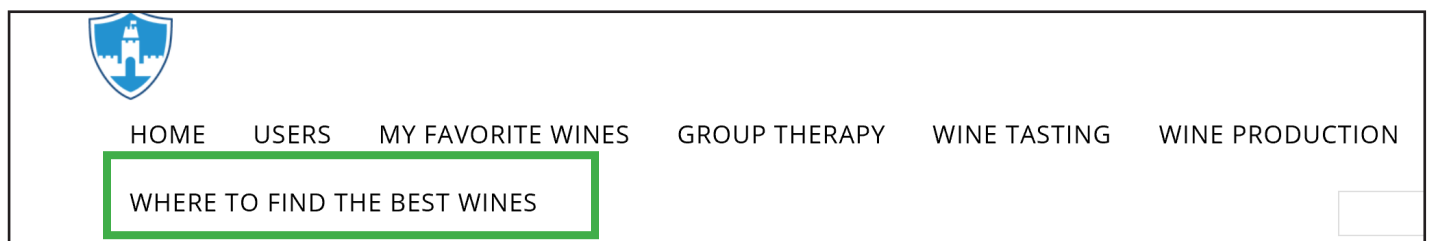


Figure 17

To add additional folders inside of that one click on the folder you just created:

1. Click **Add** from the right side toolbar
2. Click **Folder** from the popup menu. Give this new folder a title. Notice that this folder is placed inside of the previous folder. (Figure 18)

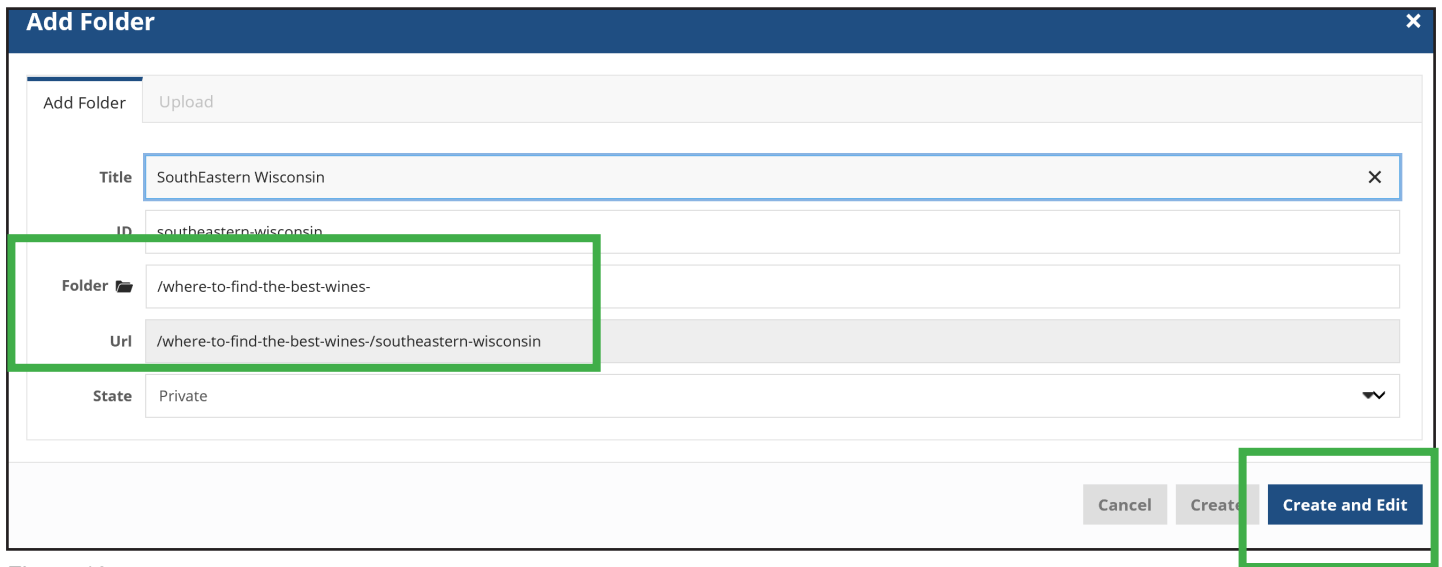


Figure 18

3. Click **Create and Edit** and you will be taken to the page showing the new folder.

You can then add your content to this folder. If you click on the main folder you created you will see a list of links to all of the folders inside of that main one. (Figure 19)

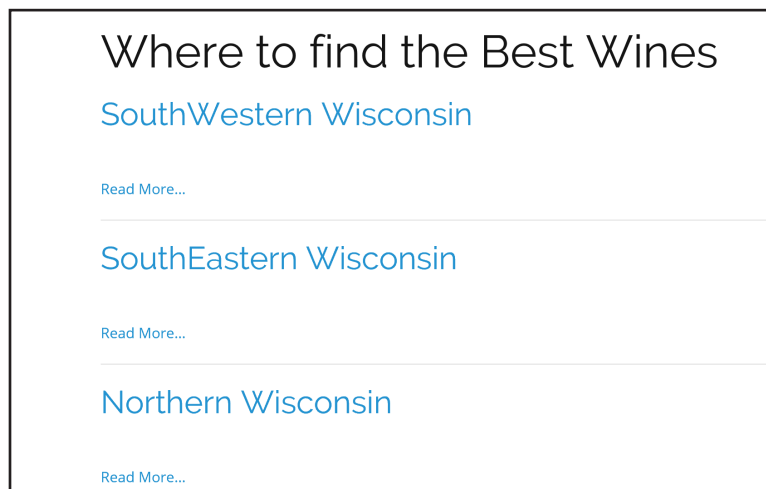


Figure 19

You can now add content to each of the folders. For example you could add folders for different wineries in each region.

1. Click on the folder you wish to add content to.
2. Click **Add** from the left hand toolbar and click **Folder**.
3. Type the name of the folder in the title space.
4. Click **Create and Edit** and you will be taken to a page with the title of the folder and a space where you can add a description.
5. When you are finished click **Save** and you will be on the page showing that folder. From here you can add more information to the folder. For example you could add a map to the winery, a link to their website, or a list of events.
6. Click **Add** button from the left side toolbar and choose what kind of content you would like to add. All content you add here will be stored in this folder. (Figure 20)



Figure 20

Adding Links

Adding a link to a page is similar to the way all other content is added to your site.

1. Click on the **Add** button on the left hand tool bar.
2. This will bring up the **Add Link** form. Put in a title for your link. The title does not have to be the URL of the link.
3. Click **Create and Edit**. (Figure 21)

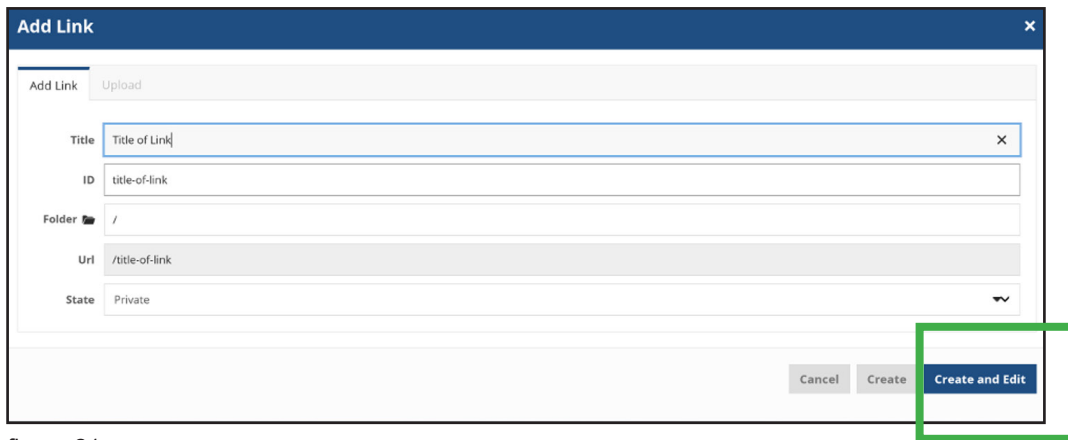


figure 21

You will then be taken to the **Edit Link** form. Here is where you will fill in the URL of the link. You can also add a lead image to the link. A lead image is a representative graphic for the link in listings. (Figure 22)

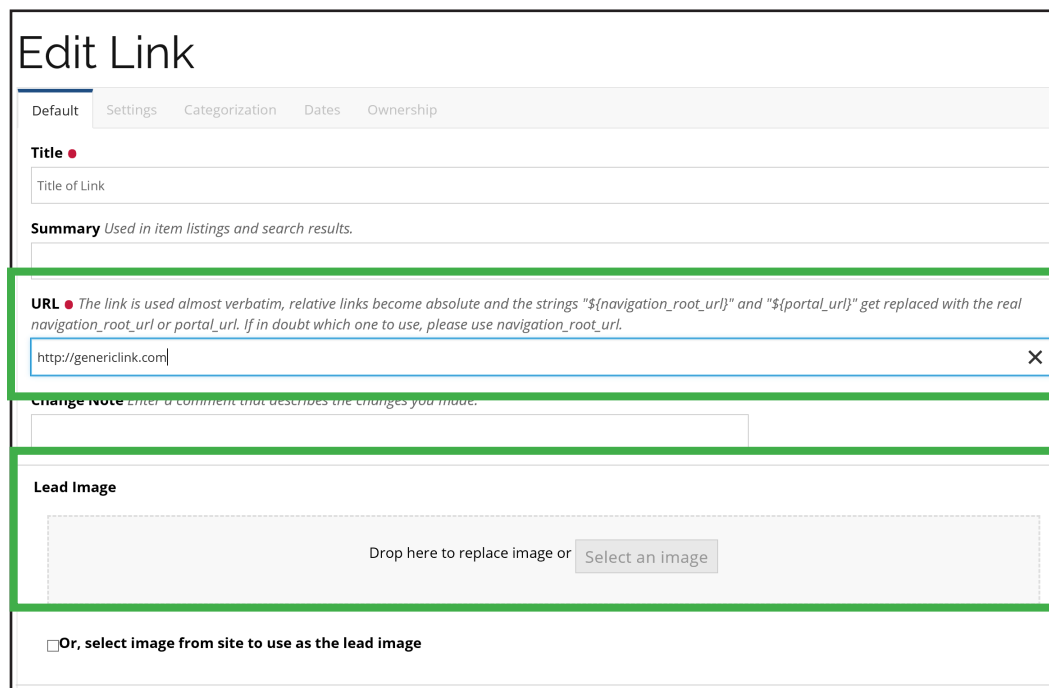


Figure 22

Editing Content

Editing Pages

Editing pages in Castle CMS is a simple process because everything is done with tiles.

To edit a page you can either find the page by clicking on Manage Content from the left hand menu and selecting the **Edit** icon from the actions menu. (Figure 1)

Tile	Last modified	Publication date	Review state	Actions
Welcome to Castle	7 months ago	7 months ago	published	 
Users	7 months ago	7 months ago	published	 
Feeds	7 months ago	7 months ago	published	 

Figure 1

1. If you are already on the page you want to edit just click **Edit** from the left toolbar
2. Click on the tile you wish to edit. This tile will then be highlighted.
(Figure 2)

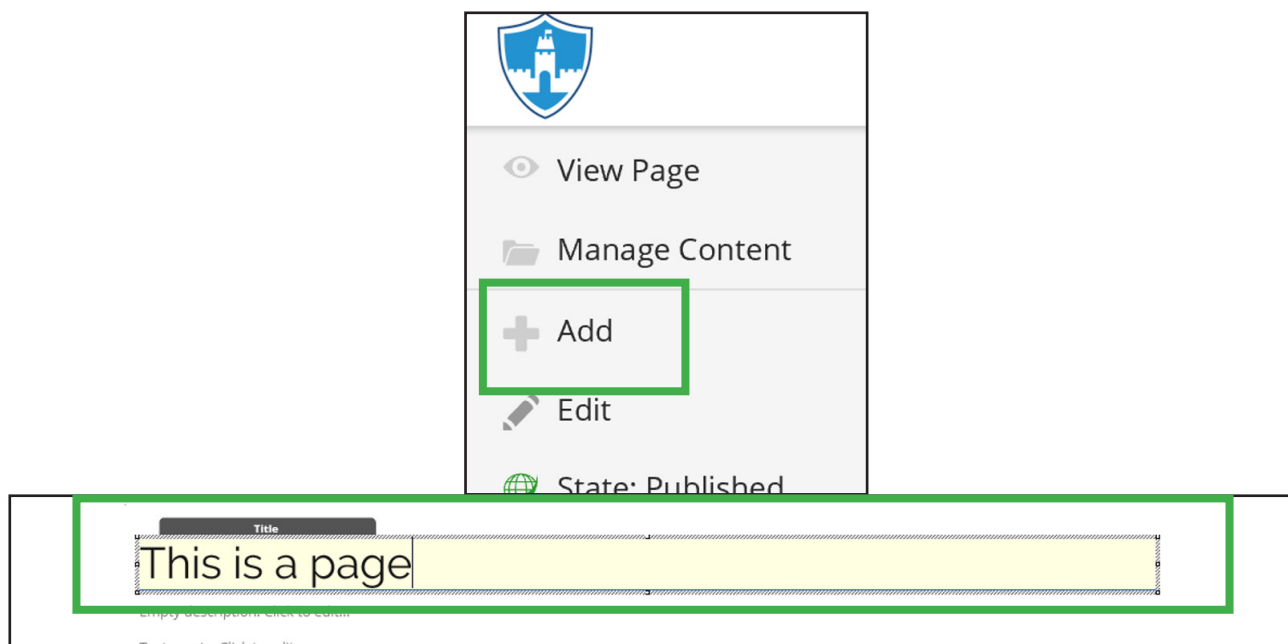


Figure 2

Once the tile you wish to edit is selected you can change the text inside that tile. You can also resize or completely delete the selected tile.

If you want to add additional tiles to the page you can do so by clicking on the **Layout** button on the top left corner of the page and clicking **Customize**. (Figure 3)

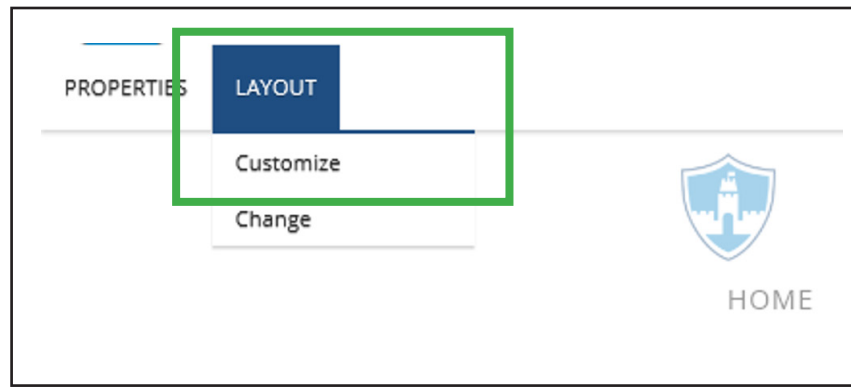


Figure 3

Then click **Insert** from the choices at the top left of the page. This will bring up a menu of the different kinds of content that you can add. (Figure 4)

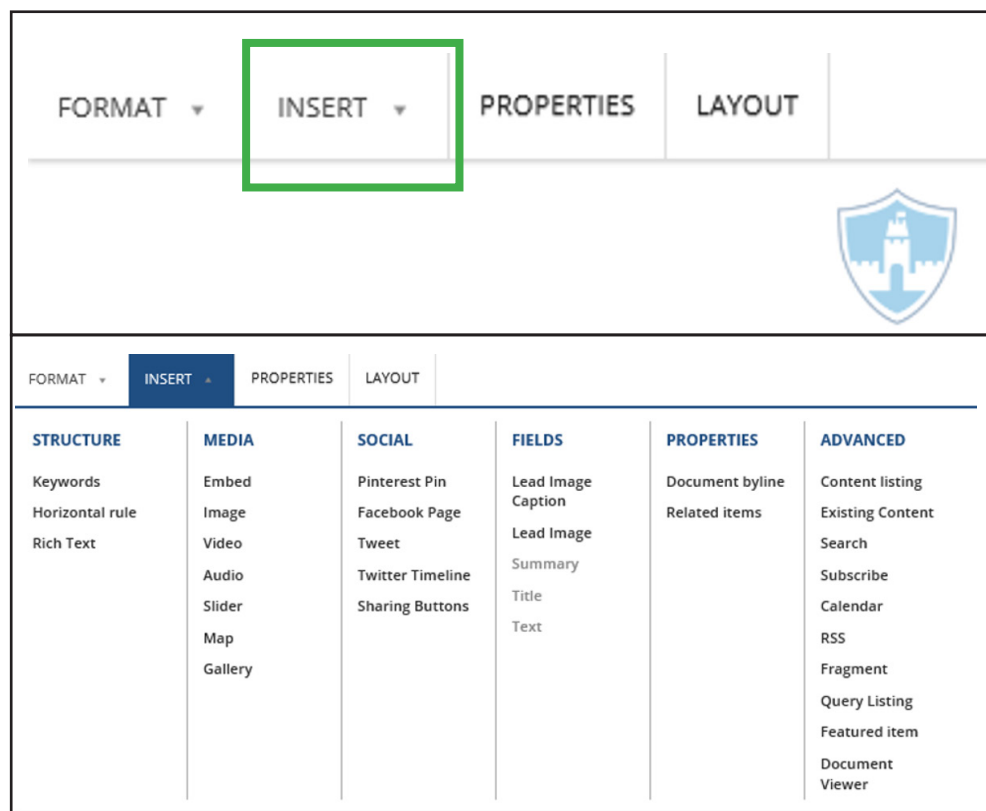


Figure 4

To add a new tile to the page:

1. Click on the type of tile you want to add. For example let's add a search bar. Look in the **Advanced** menu and click **Search**. (Figure 5)

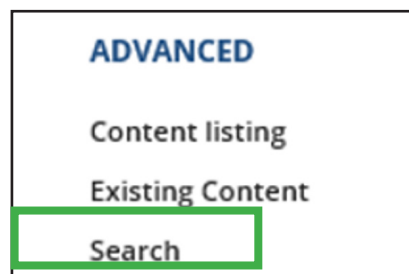


Figure 5

- 2.This brings up the **Add Search** popup menu.
3. Fill in all of the required fields which are those marked with a red dot.
4. Click the **Save** button. (Figure 6)

Figure 6

5. You will be returned to your page and the cursor will be a tile which can be placed where ever you want it to appear on the page. (Figure 7)

Figure 7

6. When you have the tile in the desired position click once and the tile will be placed there.

You may click on any tile at a later time if you decided you need to edit it or delete it all together. When you click on a tile you will see two buttons on the bottom right corner. One is **Edit** the other is **Delete**. Clicking on the **Edit** button will bring you back to the Edit popup menu and you can make any changes you desire. When you are finished click the **Save** button.

The **Delete** button will remove the tile completely from the page. When you click Delete you will be asked to confirm your delete. Click **Confirm Delete** to remove the tile and **Cancel** to leave it as it is. (Figure 8)

Figure 8

Always make sure to click the **Save** button on the upper right hand side of the page when you are finished editing or your changes will not be saved. (Figure 9)



Figure 9

Editing Events

Editing Events and links work the same way. You can find the content you wish to edit by clicking on **Manage Content** on the left side toolbar. Find the content you wish to edit in the content list and click the **Edit** icon from the **Actions** column. (Figure 10)

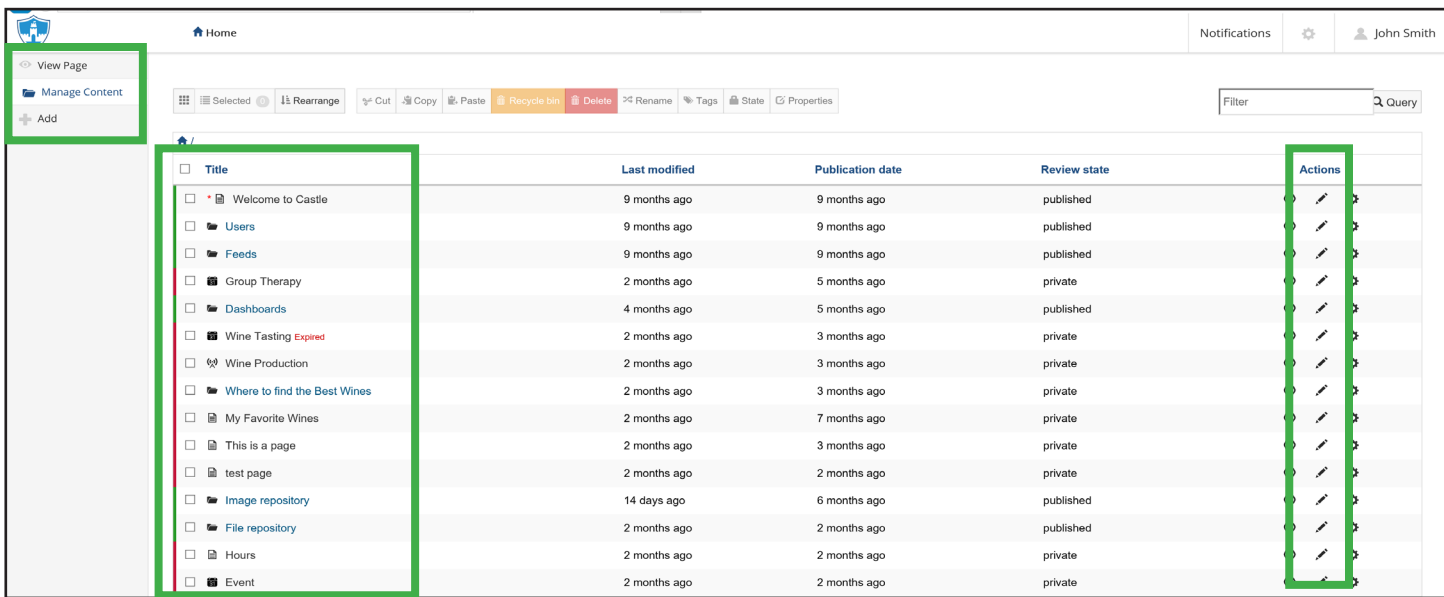


Figure 10

Choose an event from the list and you will be taken to the same **Edit Event** form that you used to create the event. You may make whatever changes you need to make from there. You must still make sure that the required fields are filled in. (They are marked with a red dot) At the bottom of the form directly above the **Save and Cancel** buttons there is a **Change Note** field. You can use this field to document any changes you made. This is helpful if multiple users have access to make changes to the event. Make sure that you click the **Save** button when you are finished editing the event so that your changes are saved. (Figure 11)

Edit Event

Events can be shown in calendars.

Default Categorization Dates Ownership Settings

Title •

Event

Summary *Used in item listings and search results.*

This is an event

Event Starts • *Date and Time, when the event begins.*

June 28, 2017 5:00 p.m.

Change Note *Enter a comment that describes the changes you made.*

Save Cancel

Figure 11

Editing Links

Editing a link works the same way as editing an event. Click on the **Manage Content** button from the left side toolbar and find the link in the content listing. (Figure 12)

Manage Content

+ Add

Selected 0 Rearrange Cut Copy Paste Recycle bin

/ Where to find the Best Wines / SouthWestern Wisconsin / Black Cat Luck

☐ Title

☒ Black Cat Winery

☐ Wine Tasting

☐ A Related Item

Figure 12

Note: Remember that you will only see the top level content when you click on the manage content button. You may need to click through folders to find the link.

Once you find the link, click on the edit button in the **Actions** column. (Figure 13)

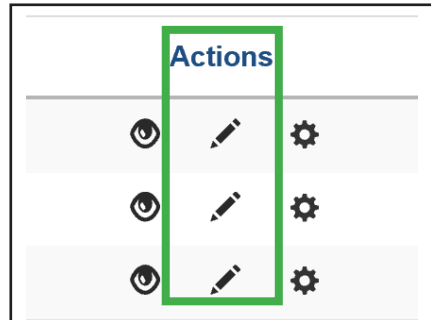


Figure 13

You will see the same **Edit Link** form that you used to create the link. Make any changes you would like and click the **Save** button. You can use the **Change Note** field to document the changes you have made. (Figure 14)

A screenshot of the 'Edit Link' form. The form has tabs for Default, Settings, Categorization, Dates, and Ownership. The Default tab is active. The form contains fields for Title (Black Cat Winery), Summary (Used in item listings and search results.), URL (http://www.blackcatviolawinery.com), and Change Note (Enter a comment that describes the changes you made.). The Change Note field is highlighted with a green box.

Figure 14

Note: Remember to always click the save button when you are finished making changes otherwise your changes will not be saved. If you don't want to save your changes click the Cancel button.

Editing News Items

Editing a News Item is similar to editing a page. Click on the **Manage Content** button from the left hand toolbar and find the **News Item** you will to edit. Click on the **Edit** icon from the **Actions** menu. (Figure 15)

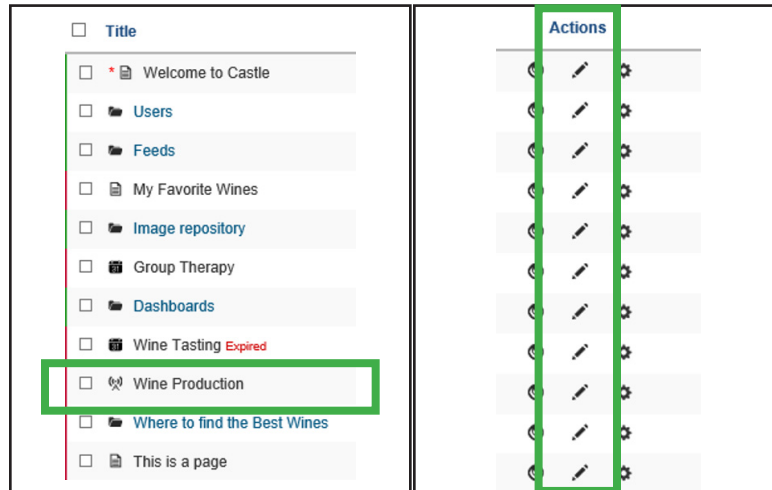


Figure 15

This will take you to the News Item in edit mode. You can make any changes to the existing tiles or use the insert menu to add additional tiles. As always remember to click the **Save** button when you finish making your changes. The Save button is at the top right hand side of the page for a News Item.

Editing Folders

To edit a folder click the **Manage Content** button from the left hand toolbar and find the folder you wish to edit. Folders have an icon that looks like a folder in front of them. Click on the **Edit** icon from the **Actions** menu. (Figure 17)

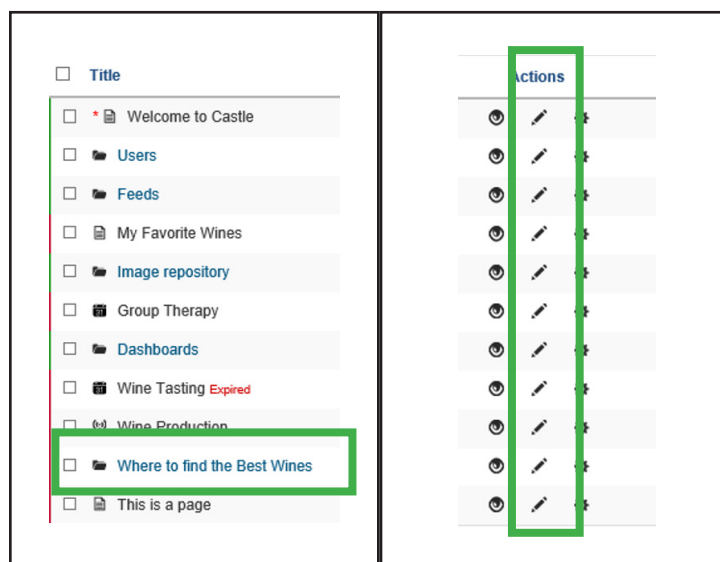


Figure 17

This will take you to the folder in edit mode which looks the same as a page. You can change information in the name and summary tiles which are the default tiles created when you create a folder. From here you can also use the Insert menu to add content to the folder. When you have finished making changes to the folder click the **Save** button in the upper right hand corner of the page.

Editing Menu: Format, Properties, and Layout buttons

There are four buttons that appear on the top left hand side of the screen when you click **Layout** then **Customize** from the editing menu. (Figure 18)

We have already discussed the Insert button and how to insert different content tiles into your pages, folders, and news items. We will now discuss the **Format**, **Properties**, and **Layout** buttons.

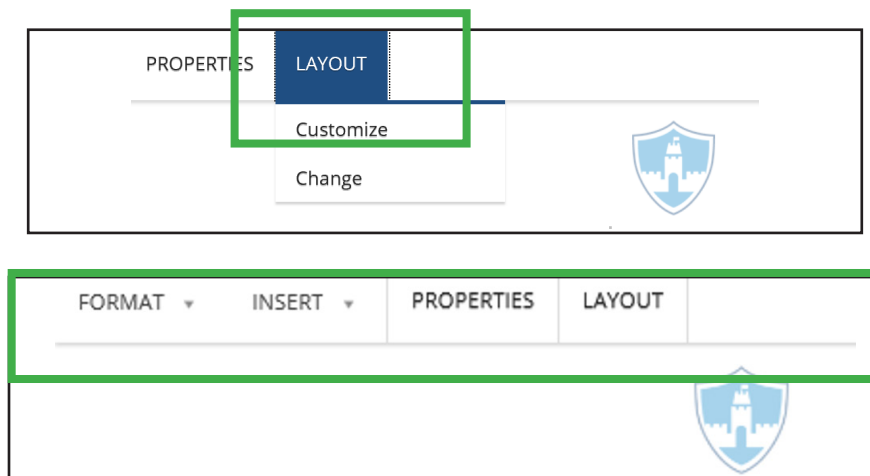


Figure 18

1. Navigate to the page, folder, or news items you wish to edit.
2. Select a tile to format. Then click on the **Format** button.
3. This will bring up a menu with two columns, one named **Tile** and the other named **Row**. Under the Tile menu there are several options. (Figure 19 on the next page)

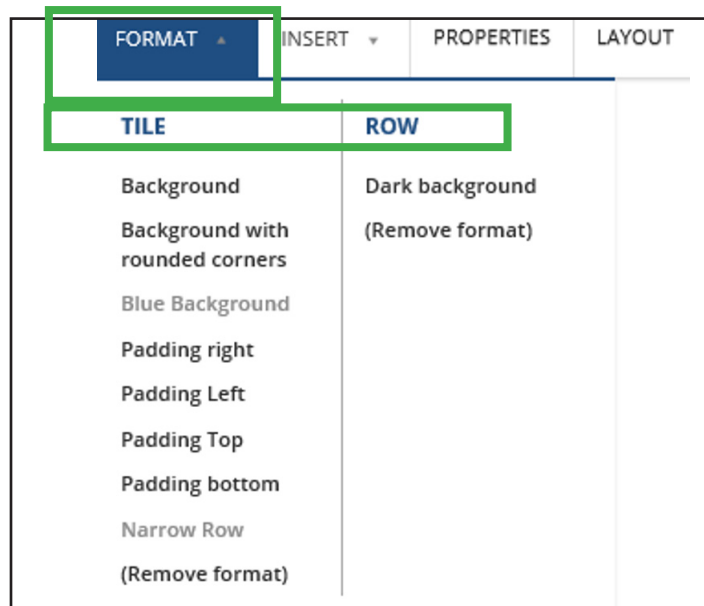


Figure 19

Background - adds a shaded square background to the currently selected tile.

Background with rounded corners - adds a shaded square background with rounded corners to the selected tile.

Padding right - adds more space on the right of the selected tile

Padding left - adds more space on the left of the selected tile

Padding top - adds more space above the selected tile

Padding bottom - adds more space below the selected tile

Remove format - removes all formatting from the selected tile

Under the **Row** column there are two options.

Dark Background - adds a shaded background to the selected row

Remove format - removes all formatting from the selected tile.

If you want to see the formatting changes click off of the tile you are working on.

When you have finished formatting the tiles click the **Save** button at the top right of the screen. This will take you out of the formatting menu and back to the page.

If at any time when in the format menu you wish to cancel your changes click the **Cancel** button in the upper right-hand corner of the screen. (Figure 20)

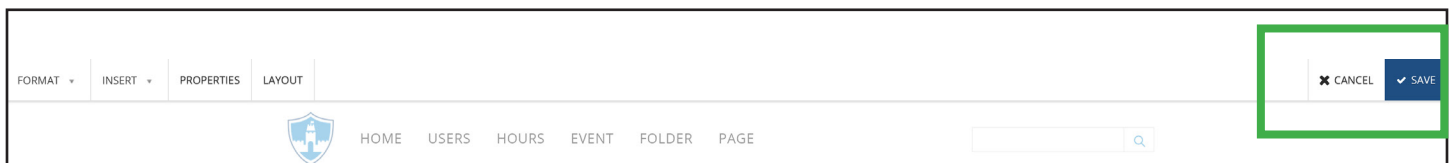
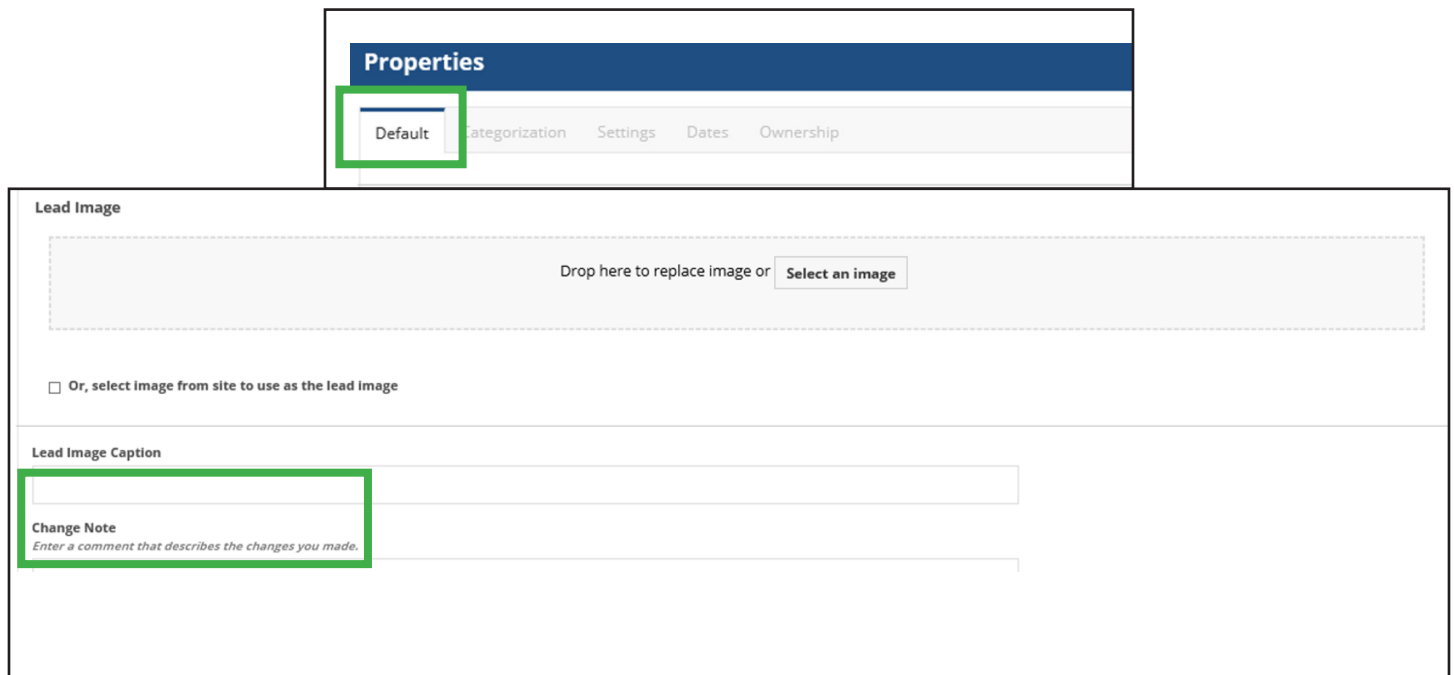


Figure 20

The **Properties** menu has five tabs.

Default - allows you to add a lead image and caption for the selected content. It also has a **Change Note** area where you can leave notes about changes you made. (Figure 21)

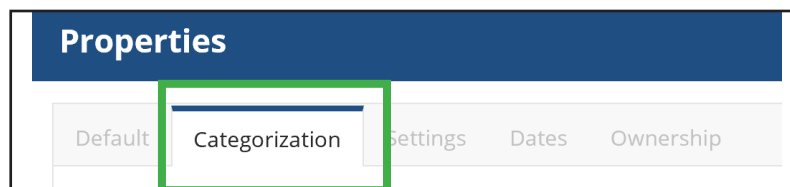


The screenshot shows the 'Properties' menu with five tabs: Default, Categorization, Settings, Dates, and Ownership. The 'Default' tab is selected and highlighted with a green box. Below the tabs, the 'Lead Image' section contains a large dashed box with the text 'Drop here to replace image or' and a 'Select an image' button. Below this is a checkbox labeled 'Or, select image from site to use as the lead image'. The 'Lead Image Caption' section has a text input field. The 'Change Note' section has a text input field with the placeholder text 'Enter a comment that describes the changes you made.'

Figure 21

Categorization

Categorization is used when a person is trying to find your webpage from a search site or to link together items which are related to each other. (Figure 22)



The screenshot shows the 'Properties' menu with five tabs: Default, Categorization, Settings, Dates, and Ownership. The 'Categorization' tab is selected and highlighted with a green box. The 'Default' tab is also visible and highlighted with a green box.

Figure 22

Related Items - The **Browse** button allows you to search the entire site for anything that is related to the content you are currently working on. Click the checkbox next to the items you would like to link and then click the **Select** Button. If you do not find anything you want to link click **Done**. (Figure 23)

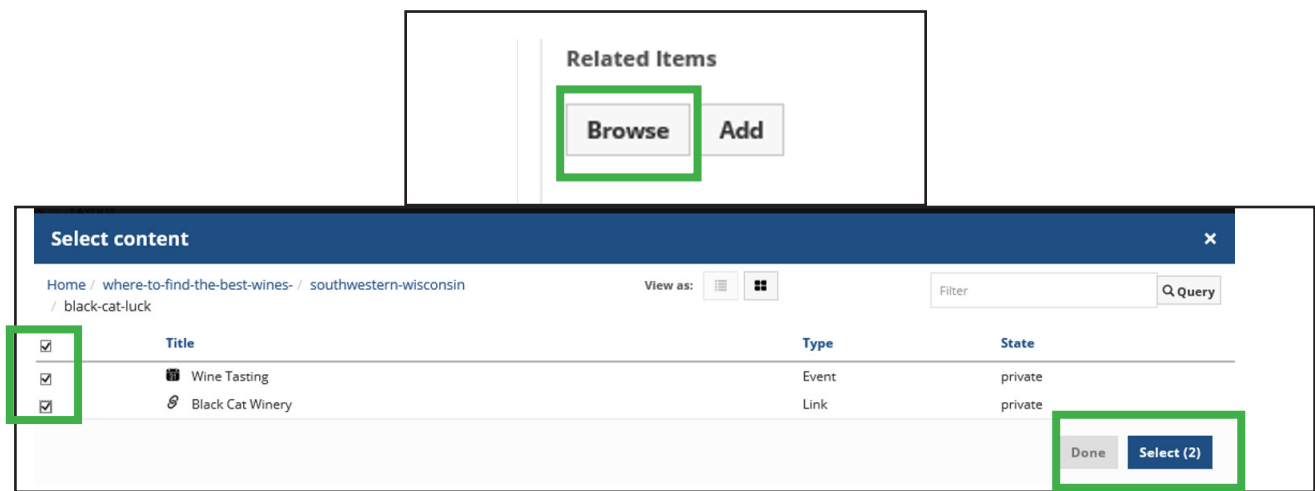


Figure 23

You will then see the items you selected under **Related Items** on the **Categorization** tab. You can arrange the order of the items or delete them from here. (Figure 24)

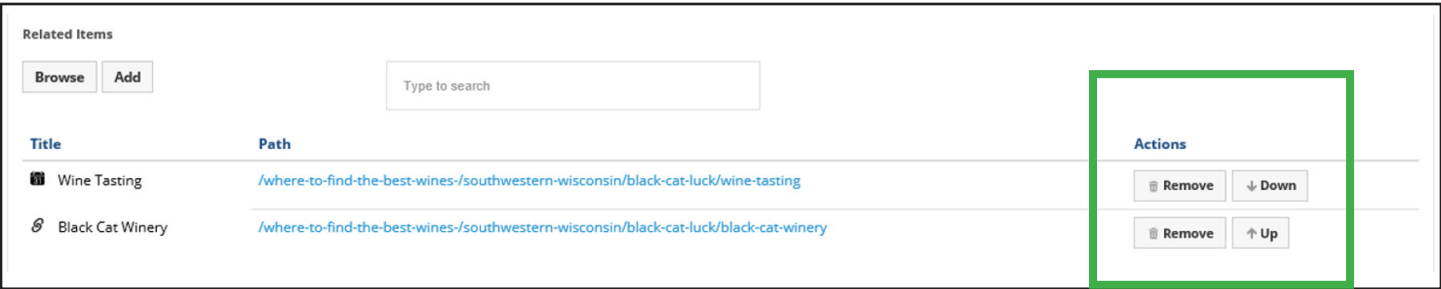


Figure 24

The **Add** button allows you to create a new page, link, event, folder, or news item that relates to the content you are currently working with. Your new item will then show up in the **Related Items** list. (Figure 25)

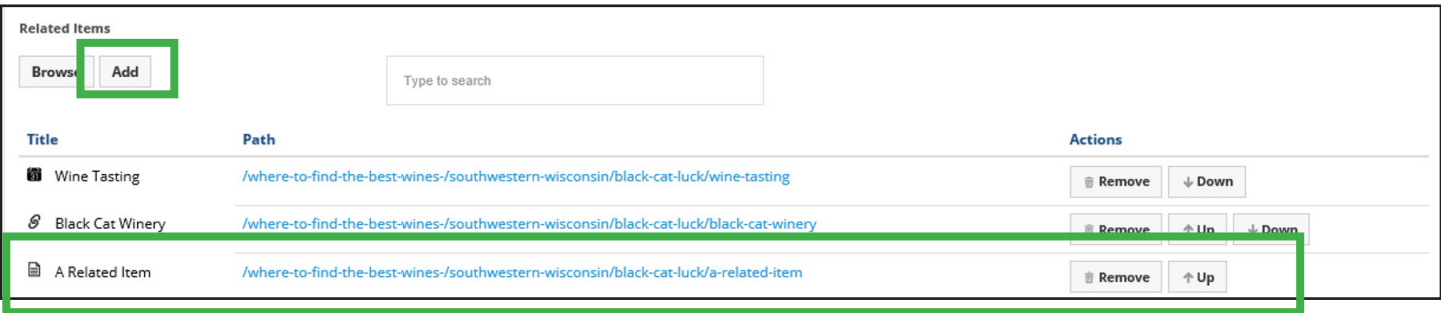


Figure 25

Locations - any locations to be referred to with this content

Coordinates - add coordinates to allow this content to be mapped. You can select more than one set of coordinates. Click the **Add Location** button and type in the location to be pinned.

(Figure 26)

Coordinates
Providing coordinates to be able to map this content. You can select more than one set of coordinates

Add location

Set Center Point ×

Search Location

Onalaska, WI **Search**

Select item from results

✓ Onalaska, WI 54650, USA(43.884409, 91.235139)

Set

Figure 26

Tags - used for ad-hoc organization of content

Settings:

Exclude from navigation - checking this box will exclude this content from the navigation tree.

Search term pins - searches this content should show in top results for.

Allow discussion - determines whether or not you want to allow discussion or comments on this content.

(Figure 27)

Properties ×

Default Categorization **Settings** Dates Ownership

☐ **Exclude from navigation**
If selected, this item will not appear in the navigation tree

Search Term Pins
Searches this content should show top in results for.

Allow discussion
Allow discussion for this content object. If set on folder, it will enable for all items inside folder.

No value

Figure 27

Dates :

Publishing Date - used to set the date and time this content is to be published. If the date is in the future this content will not show up in listings or searches until that date.

Expiration Date - used to set a date when the content will expire. When this date is reached the content will no longer show in listings or searches.

(Figure 28)

Properties

Default Settings Categorization **Dates** Ownership

Publishing Date
If this date is in the future, the content will not show up in listings and searches until this date.

June 23, 2017 3:30 p.m.

Expiration Date
When this date is reached, the content will no longer be visible in listings and searches.

Enter date... Enter time...

Figure 28

Ownership:

Creators - shows the creator or creators of this content.

Contributors - shows the names of people who have contributed to this content.

Rights - shows copyright statement or other rights information related to this content.

(Figure 29)

Properties

Default Settings Categorization Dates **Ownership**

Creators
Persons responsible for creating the content of this item. Please enter a list of user names, one per line. The principal creator should come first.

* Bridget Pangburn

Contributors
The names of people that have contributed to this item. Each contributor should be on a separate line.

Rights
Copyright statement or other rights information on this item.

Figure 29

When you have finished in any of these menus click the **Done** button in the lower right hand corner of the form. (Figure 30)

Properties [X]

Default **Settings** Categorization Dates Ownership

☐ **Exclude from navigation**
If selected, this item will not appear in the navigation tree

Search Term Pins
Searches this content should show top in results for.

Allow discussion
Allow discussion for this content object. If set on folder, it will enable for all items inside folder.

No value [v]

Folder order ●
Order in which new content is added to container

New items added to bottom [v]

Done

Figure 30

When you have finished editing your content make sure to click the **Save** button in the upper right corner of the screen. If you do not like your changes you can click the **Cancel** button in the upper right corner to cancel all changes made during the current session.

The last Editing tab is **Layout**. This tab has only two choices in its menu, **Change** and **Save**. (Figure 31)



Figure 31

If you click on change you will see a warning that changes your layout will destroy and custom layout in place. If you want to continue and change the layout click OK if not click Cancel. Unless you are the sole creator of this site you may want to check with your other team members before changing the layout.

If you choose to continue you will see four choices **Basic**, **Document**, **2 Column**, or **3 Column** (Figure 32)



Figure 32

The **Save** choice allows you to save your current layout to use again. You can choose whether you would like the layout to be available to all users or just yourself by clicking the Global check box. (Figure 33)

The image shows a 'Save Layout' dialog box with a dark blue header and a close button (X). Below the header, there is a message: 'This process takes a copy of the existing layout and saves it to a new, reusable layout.' Below this message, there is a 'Name' label and a text input field. Below the input field, there is a checkbox labeled 'Global' with the text 'Should this layout be available for all users on the site?' below it. At the bottom right of the dialog, there is a 'Save' button.

Figure 33

Click Save after naming your layout to retain your changes and save the layout.

Working with the Dashboard and Toolbars

Working with the Dashboard

The **dashboard** shows you your whole site on one page. You can see all of the changes and additions that have been made to your site. It also shows which user made those modifications and the time since the modifications have been made.

To get to the dashboard click on **your name** in the upper right hand corner of the page and choose **dashboard** form the drop down menu. (Figure 1)

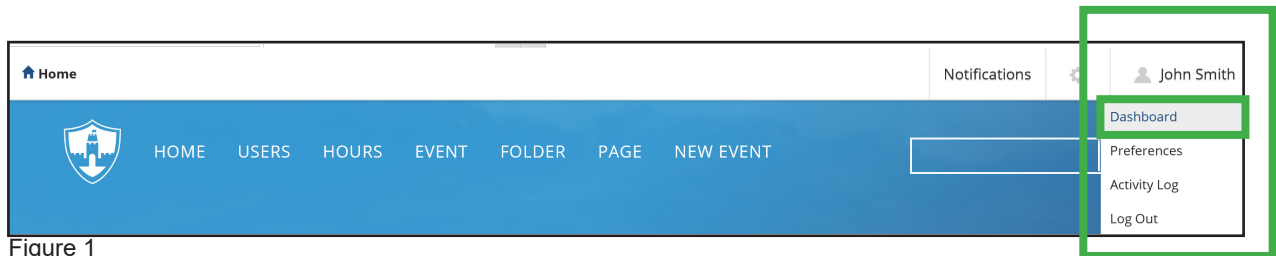


Figure 1

This is what the dashboard looks like. (Figure 2)

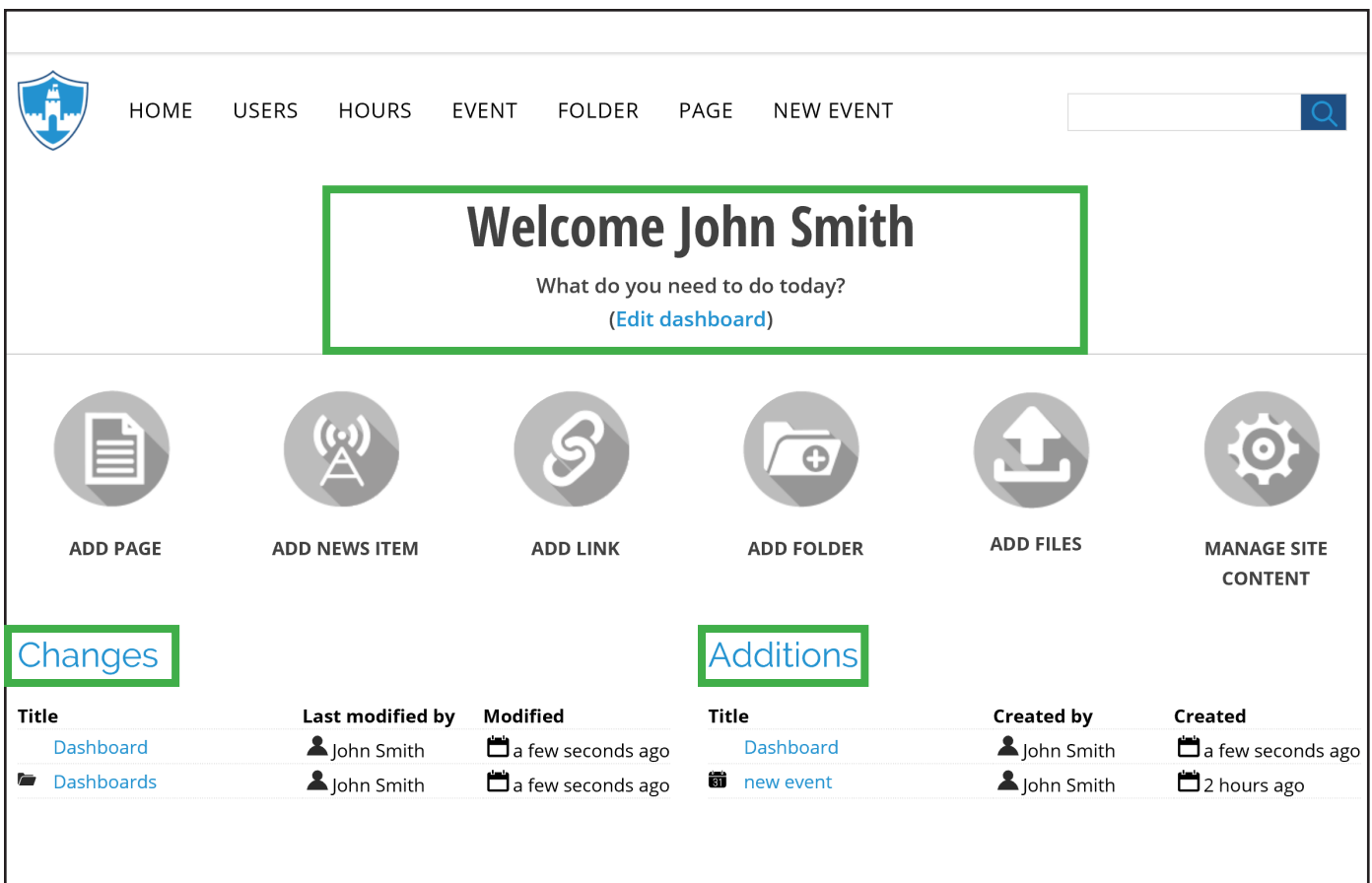


Figure 2

Any content you add to the site using the Add Page, Add News Item, Add Link, and Add Folder buttons on the dashboard will add that content to the top level and it will show up as a link on the Navigation Bar.

The **Add File** button can be used to any files to the site, both text and images. A text file added this way will go into the File Repository. A file repository folder will be automatically created if one does not already exist for the site. An image added this way will be added to the image repository folder. Make sure to click the **green check mark** when uploaded a file or image otherwise it will not be uploaded.

(Figure 3)



Figure 3

The **Manage Site Content** button will take you to the same content list you go to when you click **Manage Content** from the left hand toolbar.

You can personalize the Welcome part of the dashboard. Click the **edit dashboard** link and then click **edit** in the lower right corner of the highlighted area. (Figure 4)

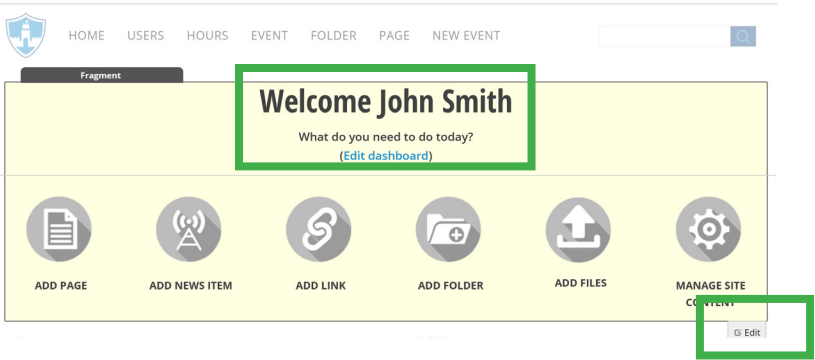


Figure 4

Click on the down arrow on the **Edit Fragment** pop up menu. (Figure 5)

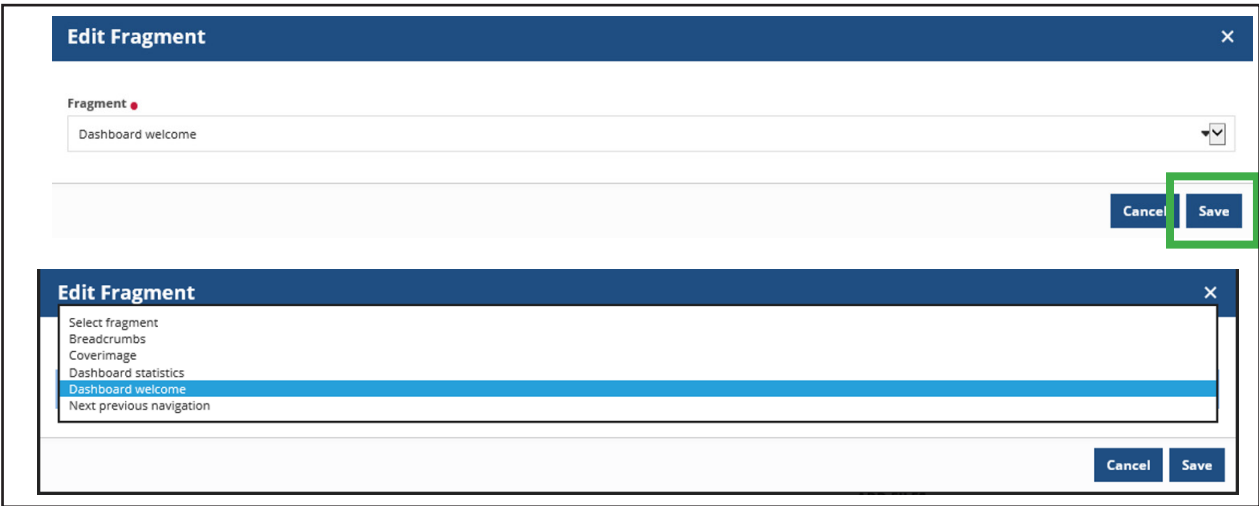


Figure 5

Select Fragment - removes the Welcome section of the dashboard.

Breadcrumbs - replaces the Welcome with a link to the home page.

Cover image - replaces the Welcome with the first image on the homepage.

Working with the Left Hand ToolBar

All of the tools you will need to build your site are on the **left side toolbar**. This section covers what each button on that toolbar does. This toolbar only appears if you are logged into the site. (Figure 6)

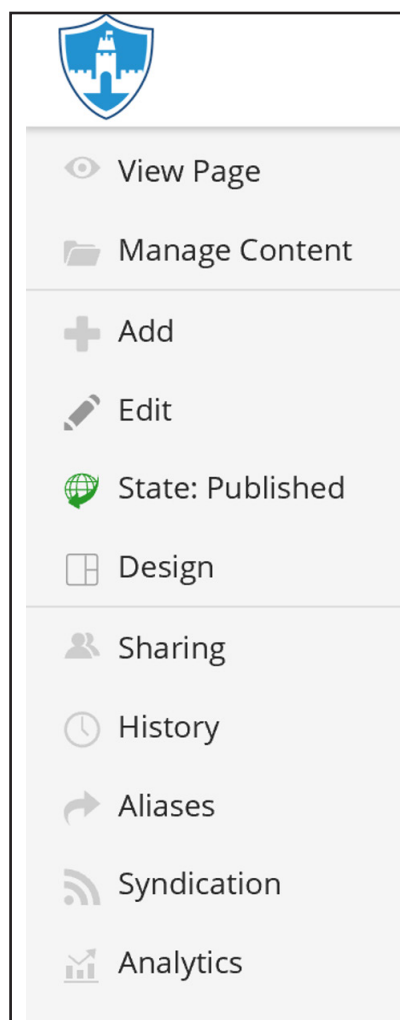


Figure 6

Manage Content - allows you to see all of the content on the site in one page. You can edit and delete content from this list. (Figure 7)

Selected

Rearrange

Cut

Copy

Paste

Recycle bin

Delete

Rename





















































Tags

State

Properties

Filter

Query

	Title	Last modified	Publication date	Review state	Actions
	 Welcome to Castle	7 months ago	7 months ago	published	  
	 Users	7 months ago	7 months ago	published	  
	 Feeds	7 months ago	7 months ago	published	  
	 My Favorite Wines	10 days ago	4 months ago	private	  
	 Image repository	7 days ago	4 months ago	published	  
	 Group Therapy	3 months ago	3 months ago	private	  
	 Dashboards	a month ago	3 months ago	published	  
	 Wine Tasting Expired	24 days ago	24 days ago	private	  
	 Wine Production	14 days ago	14 days ago	private	  
	 Where to find the Best Wines	14 days ago	14 days ago	private	  
	 This is a page	9 days ago	9 days ago	private	  
	 test page	7 days ago	7 days ago	private	  
	 File repository	7 days ago	7 days ago	published	  

There are five columns on this page:

Title - shows the title of the content and what type of content it is. The content type is shown by the icon to the left of the title. There are five content types:

- Page - piece of paper
Link - chain links
Event - calender
Folder - folder
News Item - antenna

Last Modified - the last time this content item was modified

Publication Date - when this item was created

Review State - whether this item has been published to the site or is still under review

Actions - the actions that can be taken on this item

- Click on the first icon (eye) to open the content
- Click on the second icon (pencil) to edit content
- Click on the third icon (gear) to see other actions which can be taken with that content

There is also a row of buttons along the top of this page. (Figure 8)

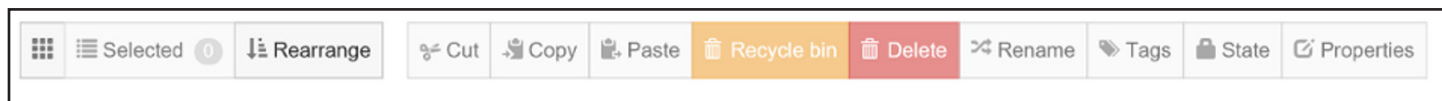


Figure 8

Clicking on the first button (the one that looks like a grid) allows you to customize your manage content page. You can choose from a list which columns you would like to see on this page. (Figure 9)

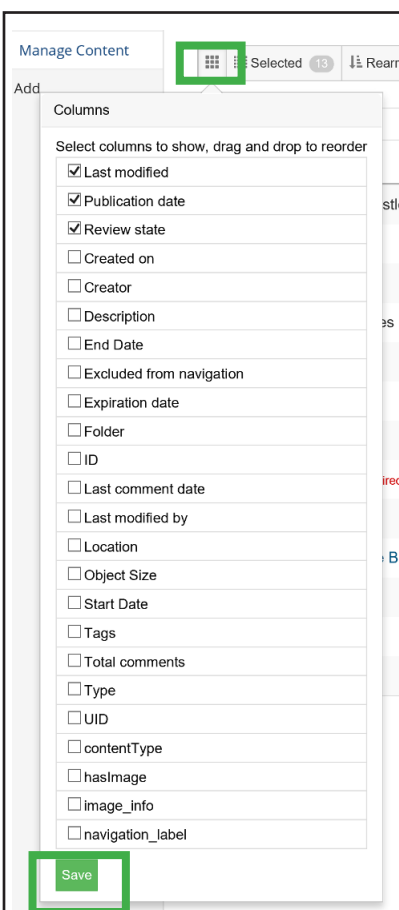


Figure 9

Click the green **Save** button at the bottom of the list when you have finished choosing the content to show and it will then show up on the Manage Content page.

The next button is the **Selected** button. This shows a list of all of the content you have selected with the check boxes to the left of the title in the list. You can remove content from the selected list and also search for specific content from this list. (Figure 10)

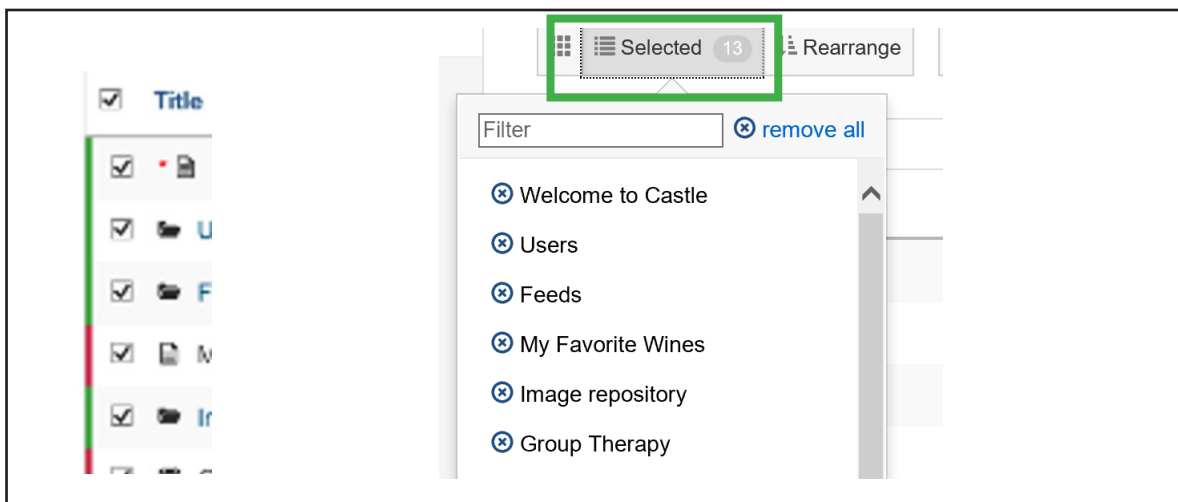


Figure 10

The **Rearrange** button allows you to rearrange the order of the content on your Manage Content page. The default arrangement is by date. (Figure 11)

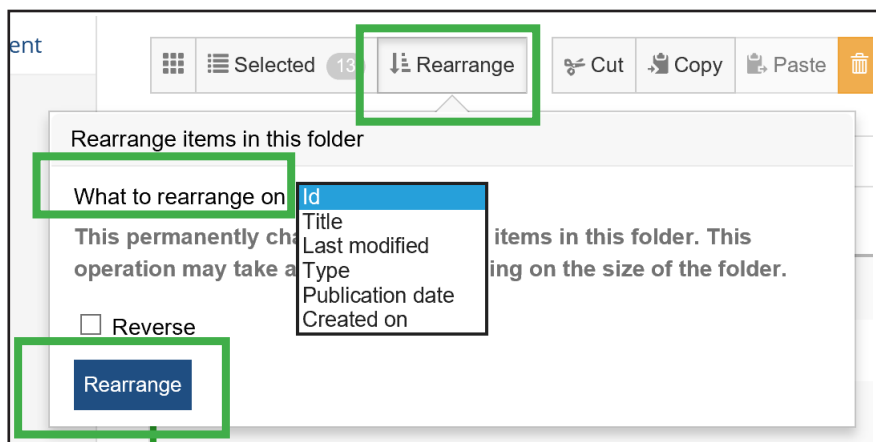


Figure 11

Click the down arrow on the box that says **What to rearrange**. This will bring up a pop up box from which you can choose how you would like the content to be rearranged. After you choose how to rearrange the content click the blue **Rearrange** button. You will see a warning box telling you that rearranging the site may change the navigation bar. If this is ok click OK if not click Cancel. (Figure 12)

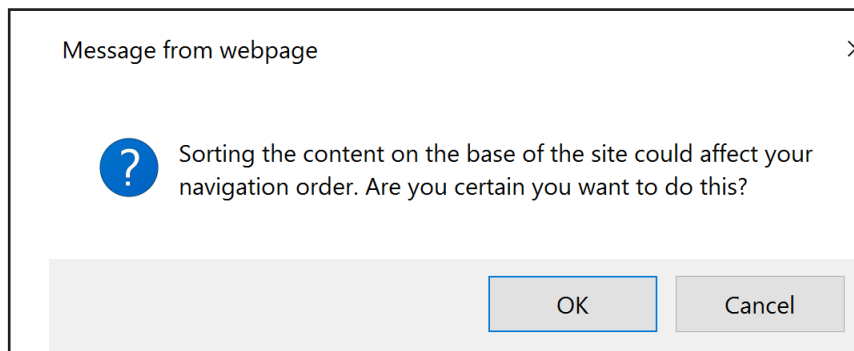


Figure 13

The next group of buttons are for editing. To use these buttons click the checkbox to the left of the content you would like to edit. The **Cut**, **Copy**, and **Paste** buttons work the same as they do when you are working with text. Cut will delete the selected content. Copy makes a copy of the selected content. Paste allows you to paste the copy into the Manage Content list.

If you want to delete content you have two choices. You can move it to the recycle bin which will put the content into the recycle bin the same as if you were putting a file in the recycle bin from your PC. It will be available there if you later decide you did not want to remove it and can be restored. You can also just delete the content but if you choose this option the content will be permanently removed and you cannot recover it later. (Figure 14)

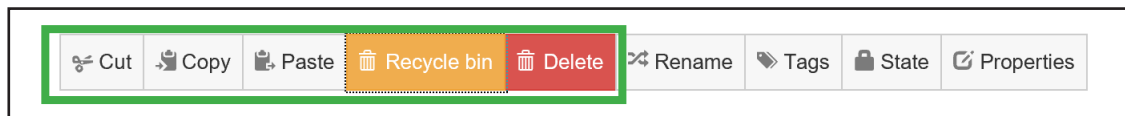


Figure 14

Rename is used to rename content. (Figure 15)

A dialog box titled 'Rename'. It has two text input fields. The first field is labeled 'Title' and contains the text 'This is a page'. The second field is labeled 'Short name' and contains the text 'copy_of_this-is-a-page'. Below the fields is a blue button labeled 'Apply'. The 'Rename' button from the toolbar is highlighted with a green border in the background image.

Figure 15

You can use the **Tags** button to add or remove tags from content. (Figure 16)

A dialog box titled 'Tags'. It has two text input fields. The first field is labeled 'Tags to remove' and is empty. The second field is labeled 'Tags to add' and is empty. Below the fields is a blue button labeled 'Apply'. The 'Tags' button from the toolbar is highlighted with a green border in the background image.

Figure 16

Click the **Apply** button when you are finished to save your changes.

The **State** button is used to publish content or submit content to be published. Whether you can publish content yourself or must submit it to be published depends on the permissions attached to your user account. You can add any comments you would like to about the content and when you are finished click the **Apply** button. (Figure 17)

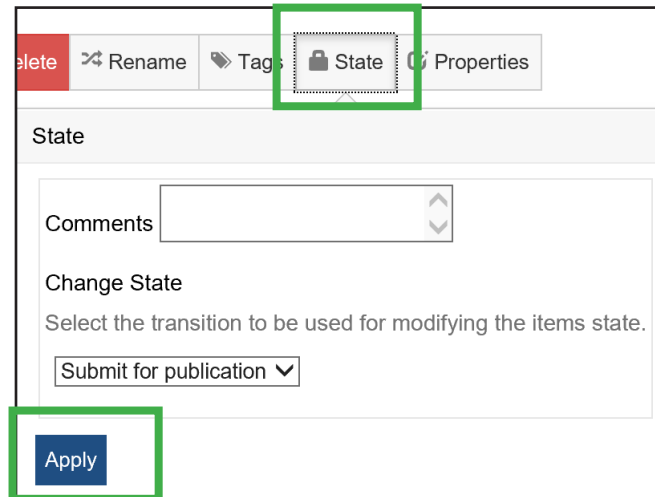
A screenshot of a software interface showing a toolbar with buttons: 'delete', 'Rename', 'Tag', 'State', and 'Properties'. The 'State' button is highlighted with a green box. Below the toolbar is a 'State' section with a 'Comments' text area, a 'Change State' label, a description 'Select the transition to be used for modifying the items state.', and a dropdown menu currently showing 'Submit for publication'. At the bottom left, an 'Apply' button is also highlighted with a green box.

Figure 17

The **Properties** button allows you to edit the properties of the selected content. You can edit the publication date, expiration date, copyright information, creators, contributors, and choose whether you want the selected content to appear in navigation. Click the **Apply** button when you are finished. (Figure 18)

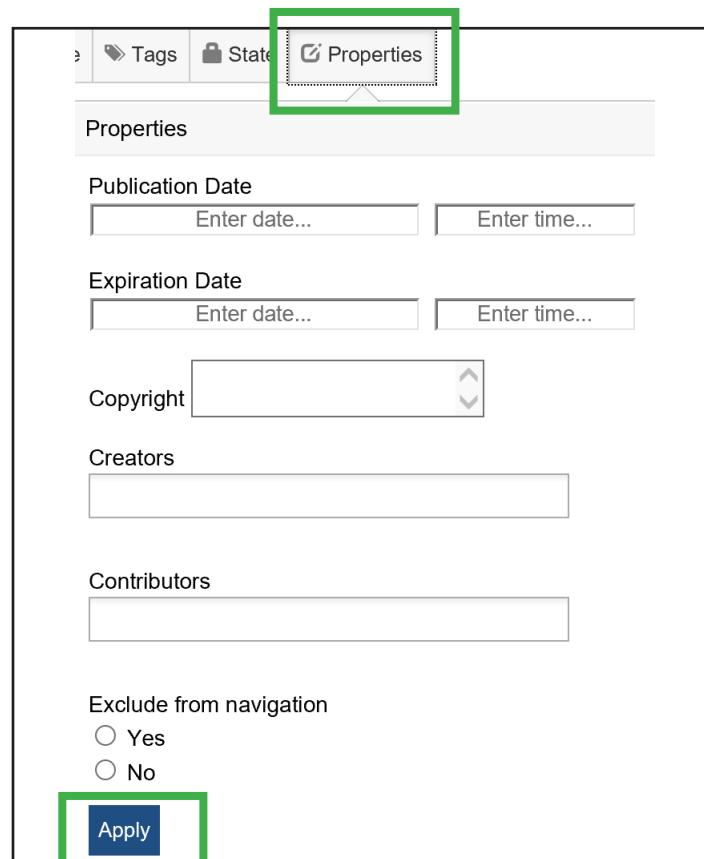
A screenshot of a software interface showing a toolbar with buttons: 'Tags', 'State', and 'Properties'. The 'Properties' button is highlighted with a green box. Below the toolbar is a 'Properties' section with the following fields: 'Publication Date' with 'Enter date...' and 'Enter time...' sub-fields; 'Expiration Date' with 'Enter date...' and 'Enter time...' sub-fields; 'Copyright' with a dropdown menu; 'Creators' with a text input field; 'Contributors' with a text input field; and 'Exclude from navigation' with radio buttons for 'Yes' and 'No'. At the bottom left, an 'Apply' button is highlighted with a green box.

Figure 18

There is a **query bar** on this page that you can use to search the site for specific content. It is located on the right side above the Actions column. (Figure 19)

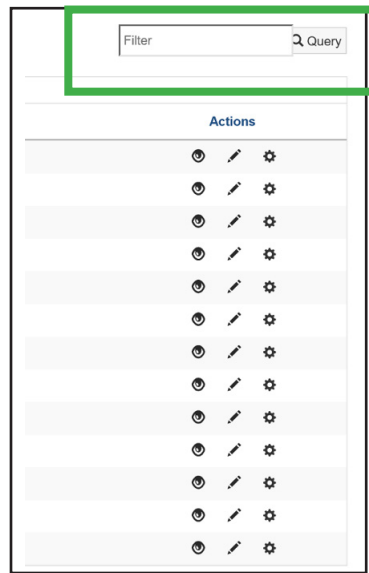


Figure 19

The **Add** button brings up the Add popup menu. You can add a page, link, event, folder, or news item from this menu. Content added from here will be added to the top level of the Navigation tree. (Figure 20)

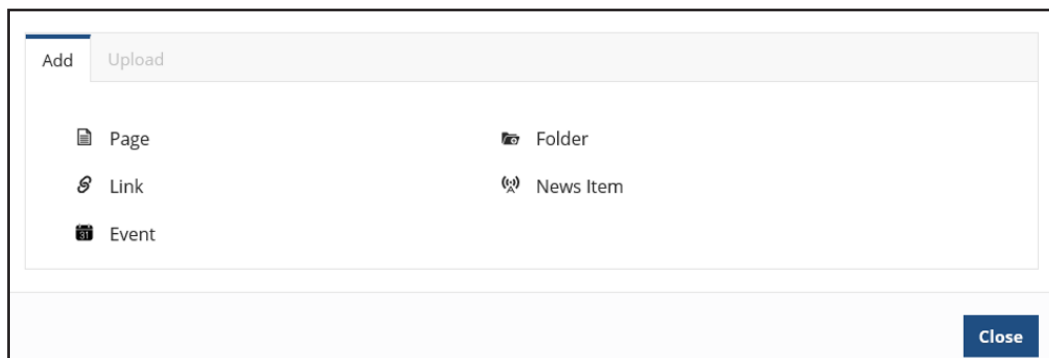


Figure 20

The **Edit** button will put the content you are currently working with into edit mode.

The **State** button shows whether or not this content is published. (Figure 21)

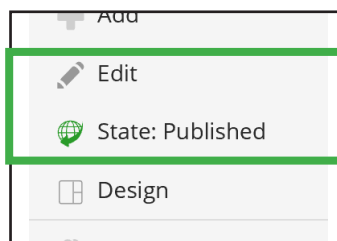


Figure 21

Clicking on the **State** button will bring up the **Publishing Process** popup menu. The top part of this menu shows the quality check list. Ideally you want all of these things to have a green check mark but you can publish the page even if they do not. If something does not pass the quality check Castle CMS will tell you what the problem is. (Figure 22)

Publishing Process

Hide Quality Check

✓ Short name format

✓ Title length

✓ Title format

✗ Summary length: should not be empty or have no more than 25 significant words

✗ Summary format: should begin with upper case letter

✓ Links

✓ Headers

✗ Double check Problems have been detected. It is recommended you fix them.

Figure 22

The bottom half of this menu allows you to change the state of the content. Unpublished content can be published or request publication. Choose **Publish** and click **Change**. (Figure 23)

Change state

Select the transition to be used for modifying the item's state.

☐ No change

☒ Publish

☐ Submit for publication

Comment

Comments will be added to the publishing history. Comments are required when quality check does not pass and you are attempting to publish.

Cancel

Change

Figure 23

You can also unpublish a page by choosing **Retract** from a published page and clicking **Change**. (Figure 24)

Change state

Select the transition to be used for modifying the item's state.

☐ No change

☐ Send back

☒ Retract

Comment

Comments will be added to the publishing history. Comments are required when quality check does not pass and you are attempting to publish.

Cancel

Change

Figure 24

The **Design** button is used to choose the design that will be used for the page. You can apply that design to all of the pages in the selected folder. (Figure 25)

Design

Selected Design: Default site design

Page Design

Design that will be applied to this page only.

- Use parent setting

Section Design

Design that will be applied to all pages inside this folder.

- Use parent setting

Cancel

Save

Figure 25

The next five buttons are the editing buttons. They work the same way these buttons work in any other situation. (Figure 26)

Cut

Copy

Paste

Delete

Rename

Figure 26

The **Sharing** button is used to setup sharing of content between users on the site. Use this to determine who can view and edit content on the site. (Figure 27)

Sharing for "Where to find the Best Wines "

You can control who can view and edit your item using the list below.

Search for user or group

Search

Name	Can add	Can edit	Can review	Can view
Logged-in users	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

☒ Inherit permissions from higher levels

By default, permissions from the container of this item are inherited. If you disable this, only the explicitly defined sharing permissions will be valid. In the overview, the symbol indicates an inherited value. Similarly, the symbol indicates a global role, which is managed by the site administrator.

Cancel

Save

Figure 27

The **History** button shows the changes that have been made to the selected content and who made them. You can revert back to an earlier version of the content from here if you do not like the changes that have been made. (Figure 28)

Content History

"Where to find the Best Wines " by [Bridget Pangburn](#) — last modified 14 days ago

History

What	Who	When	Actions
Edited	bridget	14 days ago	<button>View</button> <button>Revert to this revision</button>
Create	Bridget Pangburn	14 days ago	

Figure 28

The **Alias** button allows you to make content available under more than one URL. Enter the short name or path for the alias in the box. When you are finished click **Add**. (Figure 29)

Welcome to Castle CMS

Manage aliases

Using this form, you can manage aliases for an item. This is an easy way to make an item available under two different URLs.

Existing aliases for this item

Alias

Enter the alternative Short Name or an absolute path where an alias should exist.

Existing aliases for this item

Cancel

Add

Remove

Figure 29)

You can remove an alias from here too. Click on the check box to the left of the alias you want to remove and click **Remove**. (Figure 30)

Welcome to Castle CMS

Manage aliases

Using this form, you can manage aliases for an item. This is an easy way to make an item available under two different URLs.

Existing aliases for this item

Alias

Enter the alternative Short Name or an absolute path where an alias should exist.

Existing aliases for this item

☒ /www.blackcatwinery.com

Cancel

Add

Remove

Figure 30

The **Preview** button allows you to see what your site will look like on multiple devices. Use the **Select Device** drop down menu to choose the size you would like to preview. This can be helpful if you are concerned about your site working on mobile devices. (Figure 31)

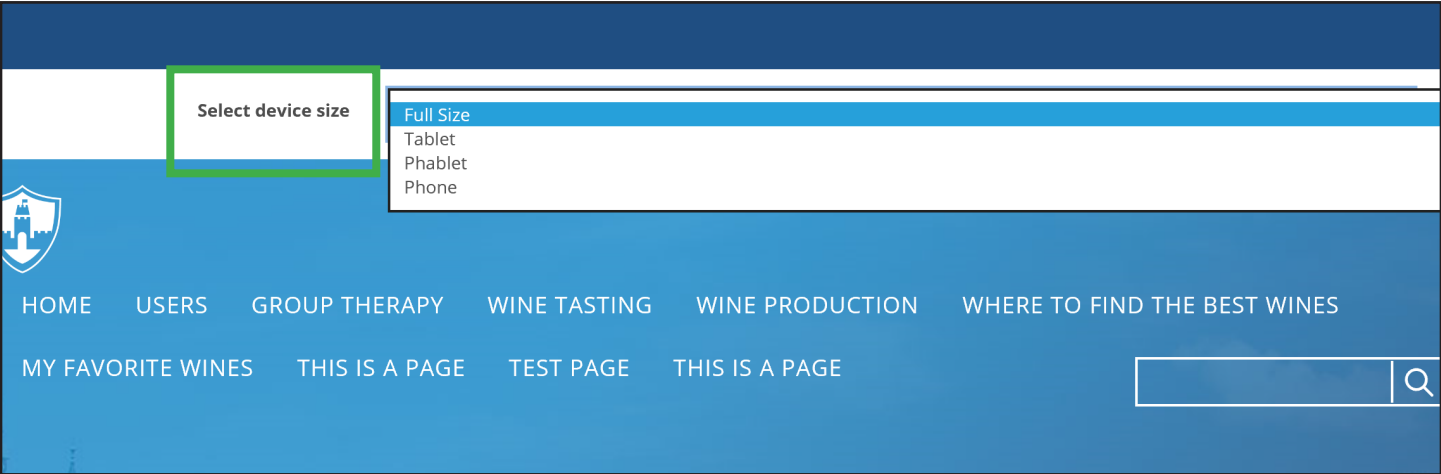


Figure 31

Slots are areas in the theme where you can place tiles that are outside the main content. Click on the area you want to edit. (Figure 32)

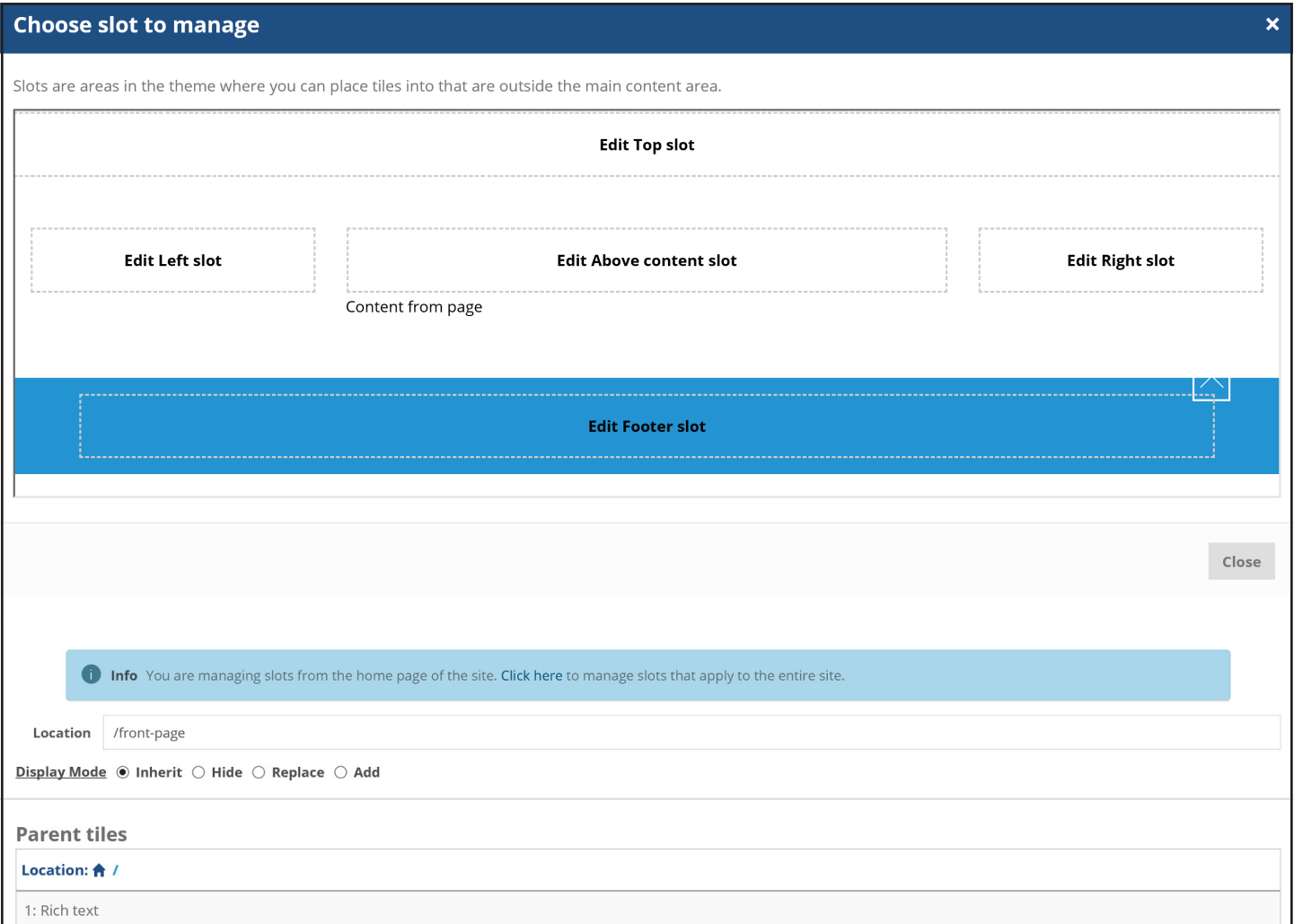


Figure 32

Working with the Top Toolbar

The **top toolbar** contains a few buttons to the left and right sides of the screen. On the left side you can see the **navigation path** to the content you are currently viewing. Clicking on any part of the navigation will take you back to that content. (Figure 33)



Figure 33

The right side has **Notifications**, **Settings**, and the **Login** buttons. (Figure 34)



Figure 34

If you click on **Notifications** you will see a list of all of the changes you have made or messages you have received. (Figure 35)

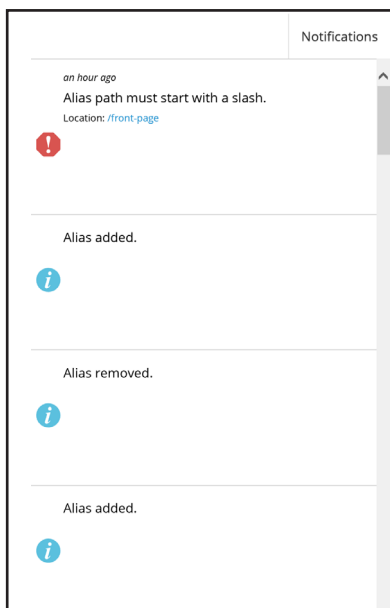


Figure 35

Clicking on **Settings** brings up a drop down menu you can use to change settings on the site. (Figure 36)

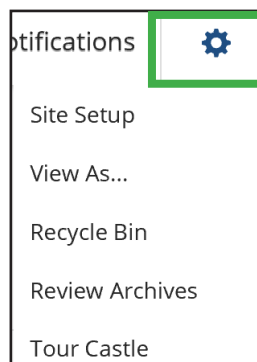


Figure 36

Site Setup takes you to a dashboard- like page you can use to setup your site.

View As allows you to view the site as another user or as the public will see it. A message appears at the bottom left side of page saying this is how the user you selected views the site. Click on the X next to that message to return to your normal view. (Figure 37)



Figure 37

Recycle Bin allows you to see what is in your recycle bin. You can empty the bin, restore content, or delete content permanently from here. (Figure 38)

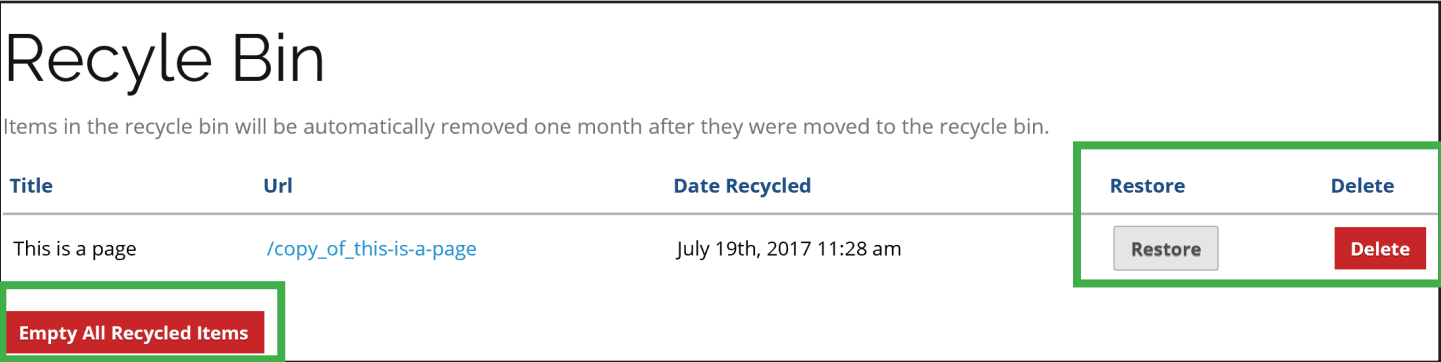


Figure 38

Review Archives takes you to the archive management page. Archive Management has to be setup for this to work. (Figure 39)

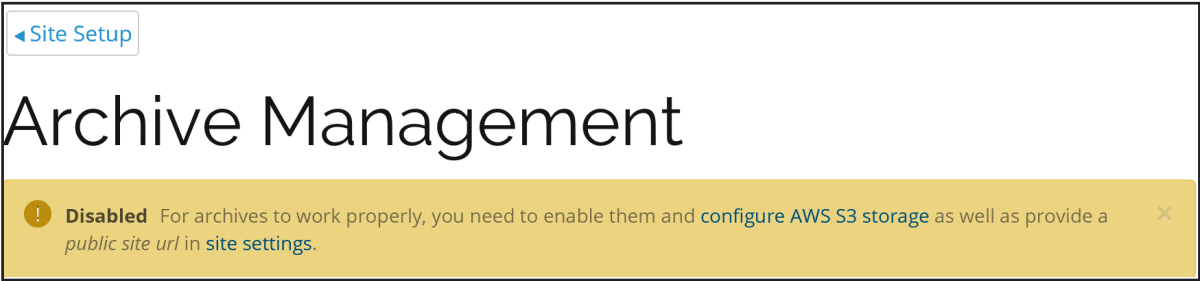


Figure 39

Tour Castle will give you a guide to become familiar with Castle CMS. (Figure 40)

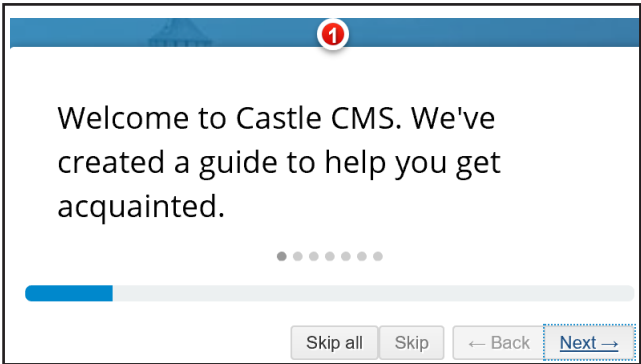


Figure 40

Using Tiles

Tiles are what make using Castle CMS so simple. A Castle CMS site is made up of tiles. If you don't know what tiles are think of the Windows 8 interface, it is made up of tiles. All of the content added through the Insert menu in Edit mode are tiles.

To create a tile navigate to the page or folder you want to add the tile to.

1. Click on the **Edit** button from the left toolbar.
2. Click **Layout** and then **Customize** from the menu on the top left of the screen.
3. Click **Insert**
4. Choose the tile type you want to add. (Figure 1)

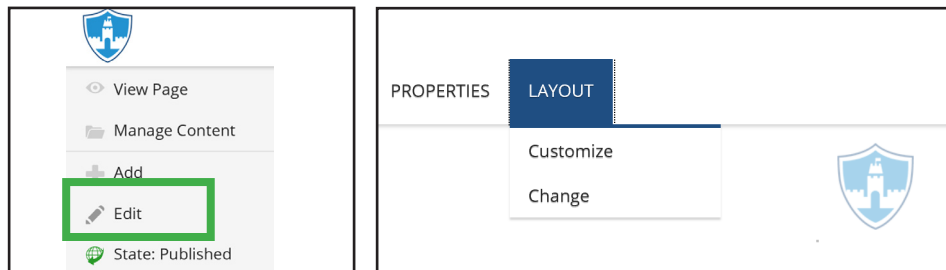


Figure 1

For example say you wanted to add a search bar to your page. You would click on **Search** under the **Advanced** column in the **Insert** menu. (Figure 2)

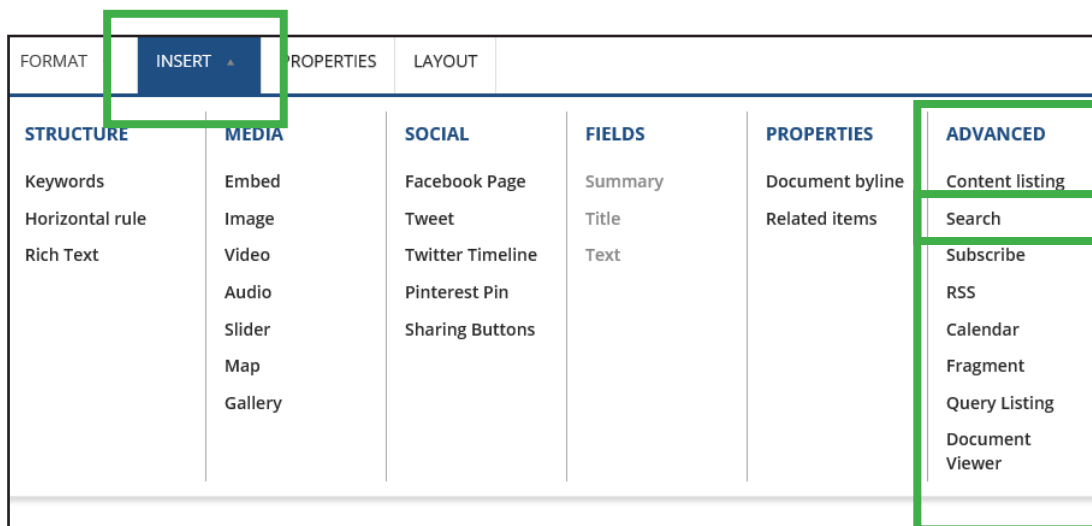


Figure 2

This will bring up the **Add Search** popup menu where you can choose the options you would like for your search bar. All tiles have popup menus where you choose the options you would like for that tile. (Figure 3)

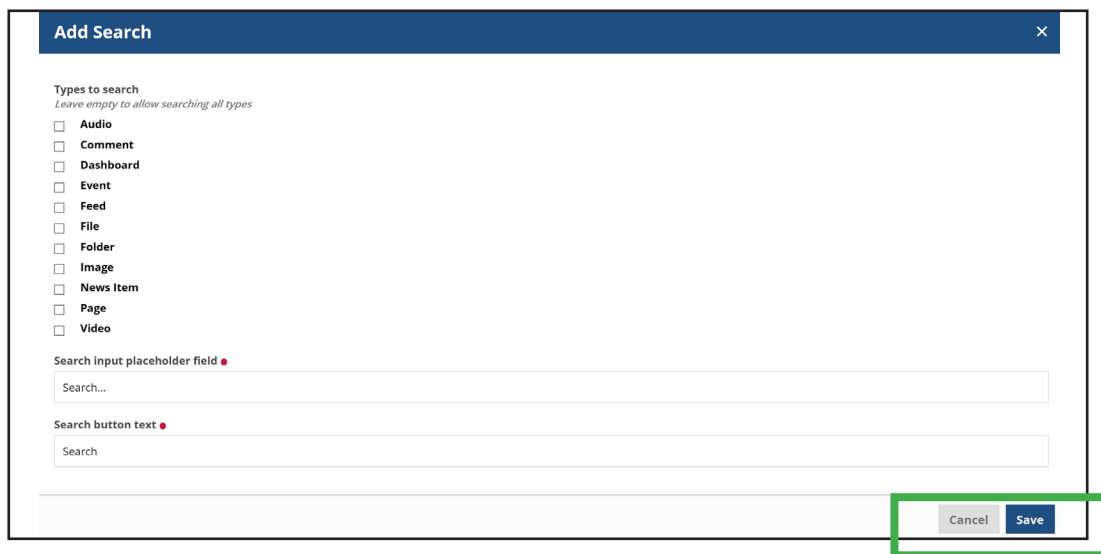
The image shows a modal window titled "Add Search" with a close button (X) in the top right corner. Inside the modal, there is a section "Types to search" with the instruction "Leave empty to allow searching all types". Below this is a list of checkboxes for different content types: Audio, Comment, Dashboard, Event, Feed, File, Folder, Image, News Item, Page, and Video. At the bottom of the modal, there are two input fields: "Search input placeholder field" with the placeholder text "Search..." and "Search button text" with the placeholder text "Search". In the bottom right corner of the modal, there are two buttons: "Cancel" and "Save". A green rectangular box highlights the "Cancel" and "Save" buttons.

Figure 3

Click **Save** and you will have a tile of a search bar which you can place where ever you would like on your page. (Figure 4)

The image shows a page layout with a "Hours" tile. The tile has a title "Hours", a description "Empty description. Click to edit...", and a status "Open". Below the status, there is a table showing the hours for each day of the week: Monday - Friday 9-5, Saturday 9-10, and Sunday Closed. On the right side of the page, there is a search bar tile. The search bar has a placeholder text "Search..." and a button labeled "Sea". A green rectangular box highlights the search bar tile, and a blue line points from the top of the box to the "Open" status of the "Hours" tile.

Click where you would like to place the search bar. That is all there is to it. (Figure 5)

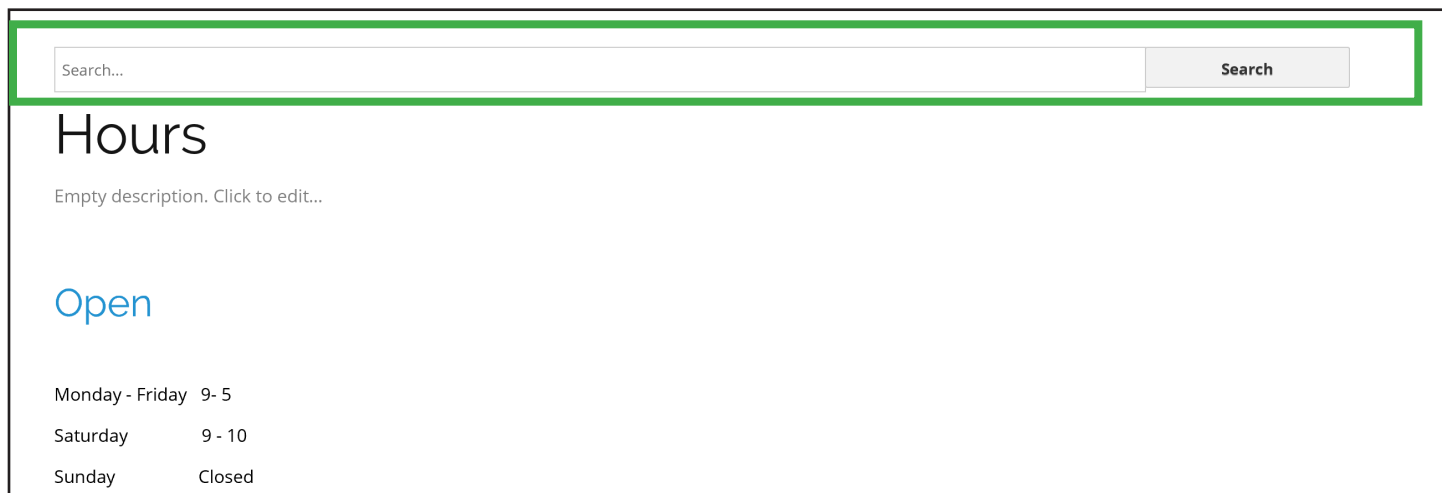
The image shows the same page layout as Figure 4, but with the search bar tile placed at the top of the page. The search bar has a placeholder text "Search..." and a button labeled "Search". A green rectangular box highlights the search bar tile. Below the search bar, the "Hours" tile is visible, showing the same content as in Figure 4.

Figure 5

You can also move existing tiles around on the page. Just click on the tile you want to move and your cursor will turn into the move cursor. You can then drag and drop the tiles anywhere you want on the page. (Figure 6)

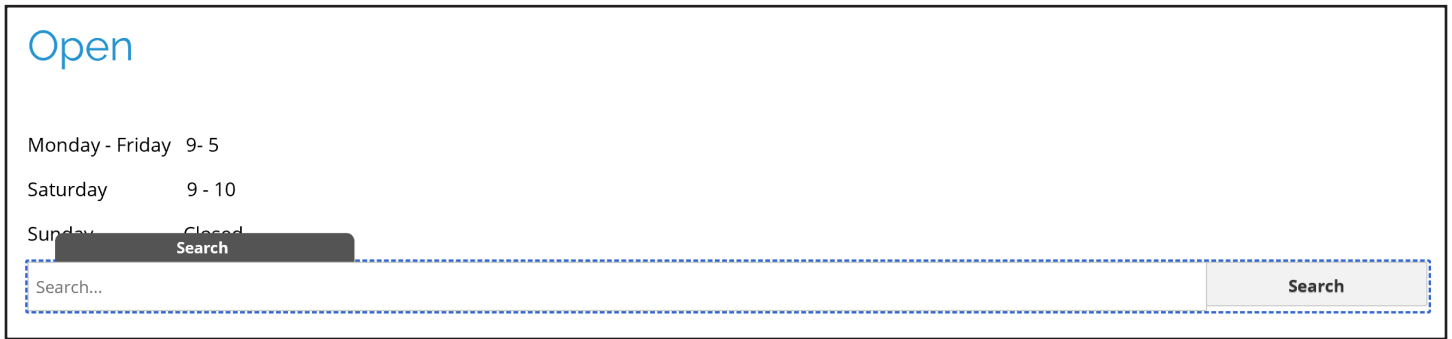


Figure 6

You easily layout your site by moving the tiles around until you are happy with how everything looks.

Using the TinyMCE toolbar

The TinyMCE toolbar is the one that you see above a text box or anything other tile that using rich text. It is used for formatting the text in that tile. (Figure 1)

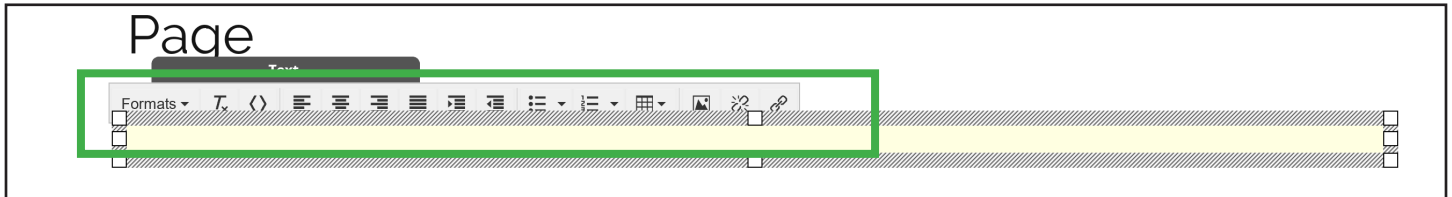


Figure 1

Click on the Formats button to bring up a dropdown menu showing the choices you can use to format the text in the text box.

1. **Headers** - Gives you a choice of different headers you can use. Highlight the text you want to format and choose the Header style you would like to use. (Figure 2)

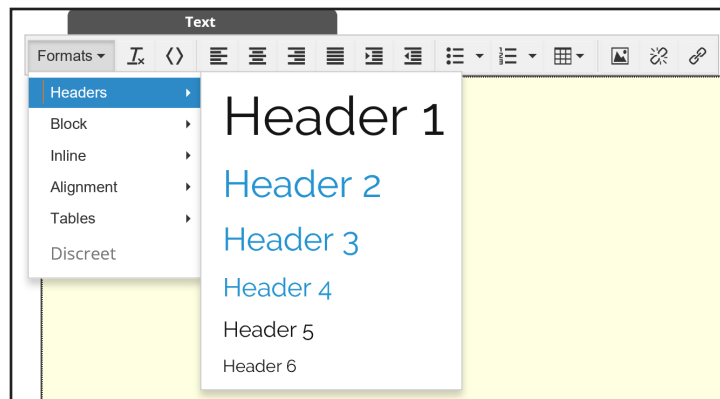


Figure 2

2. **Block** - Used to format a paragraph. Highlight the text you want and choose the formatting you would like. (Figure 3)

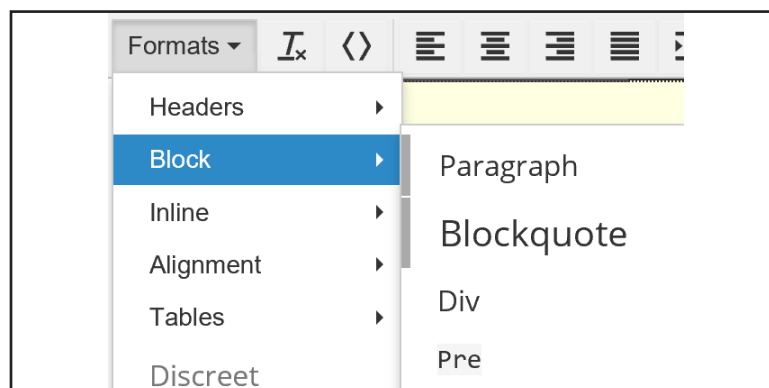


Figure 3

3. **Inline** - Used to format text. Highlight the text you want and choose the format you would like to use. (Figure 4)

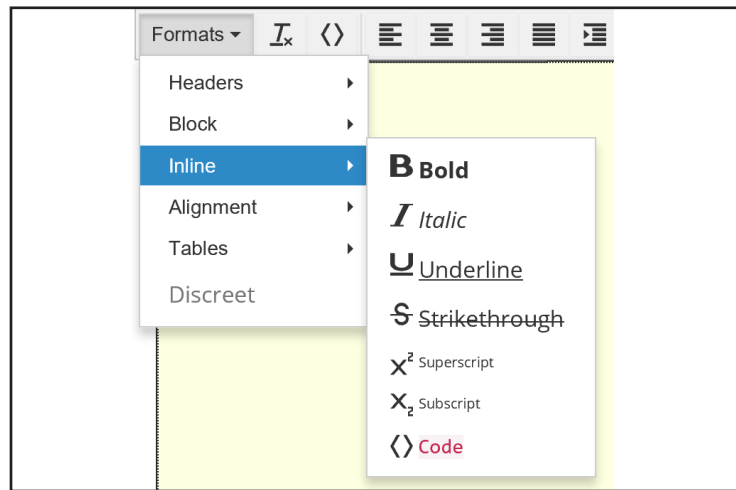
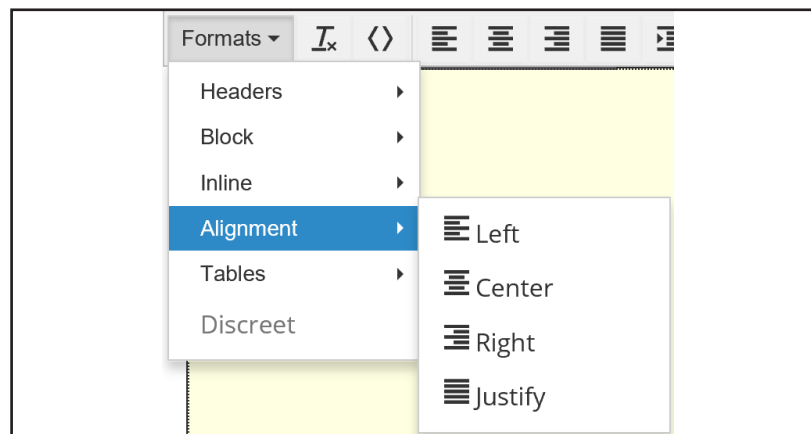


Figure 4

4. **Alignment** - Used for aligning text. (Figure 5)



The next button is used to clear formatting. Highlight the text you want to clear and click **Clear Formatting** to remove the formatting on the selected text. (Figure 6)



Figure 6

The **Source Code** button allows you to see and edit the HTML source code for the rich text. (Figure 7)

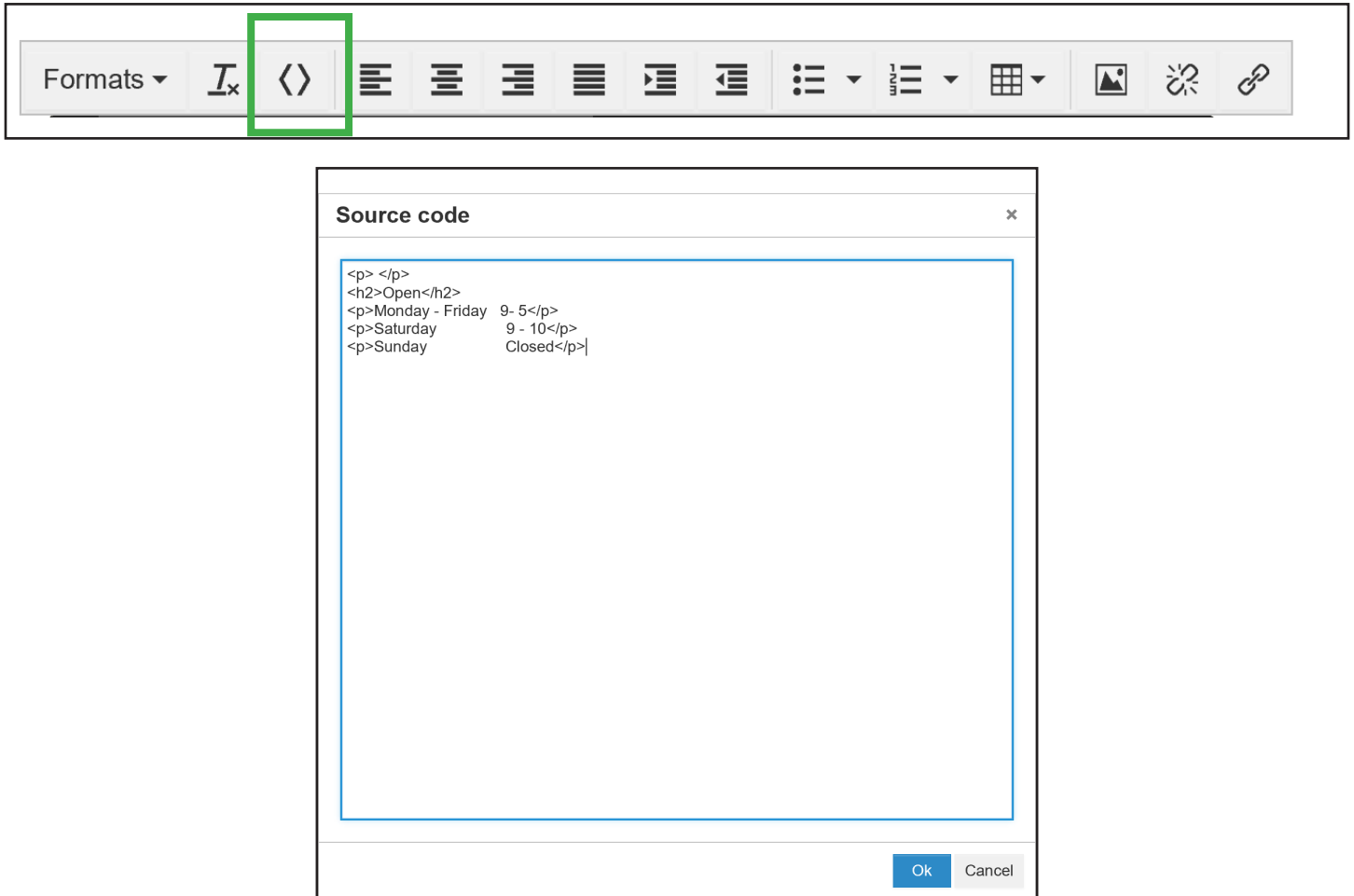


Figure 7

The next six buttons are for aligning text. (Figure 8)

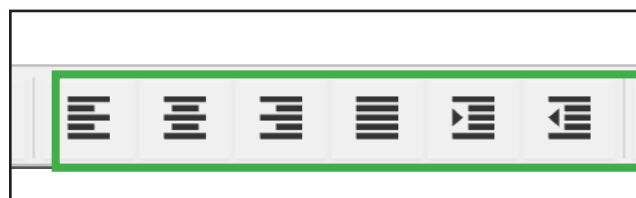


Figure 8

The **Bullet List** and **Number List** buttons are used to create those kind of lists. The arrows next to these buttons give you the different options for bullets or numbers. (Figure 9)

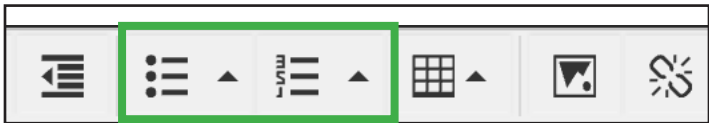


Figure 9

The **Table** button adds a table to the text box. Click on the arrow next to the button to see all of the options for creating the table. (Figure 10)

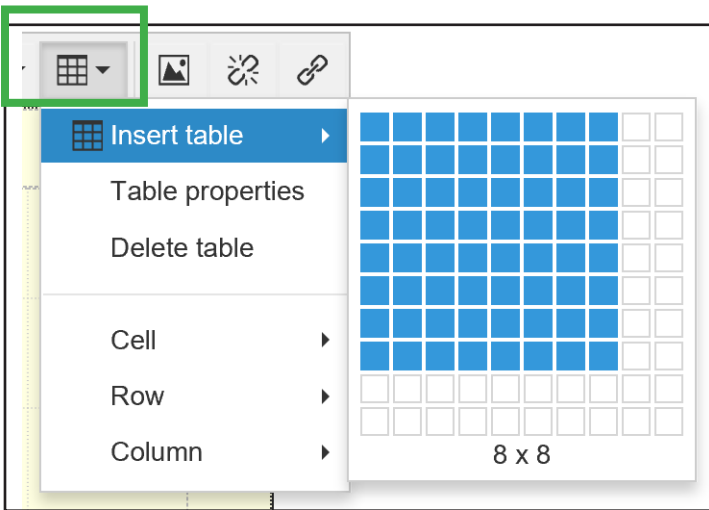


Figure 10

You can edit the properties of the table by clicking on it and using the toolbar below the table. (Figure 11)

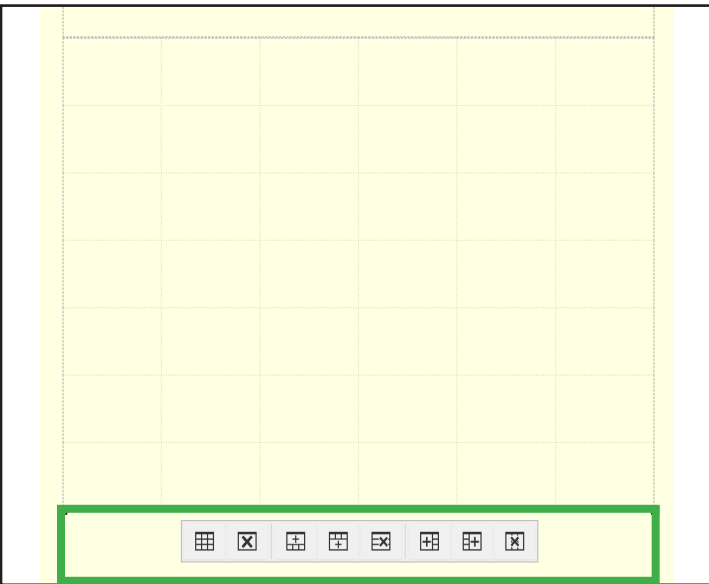


Figure 11

The **Insert/Edit Image** button brings up the Insert Image Popup menu that you can use to add an image to the text box. For more information on adding or editing images see the Adding Content section of this manual. (Figure 12)



Figure 12

The last two buttons are **Remove Link** and **Insert/Edit Link**. (Figure 13)



Figure 13

This covers the default setup of the TinyMCE toolbar. The settings can be changed in the Site Setup menu.

Using Folders for Organization

The easiest way to organize the content on your site is to use folders. Folders in Castle CMS work the same way as folders on your computer work. All of the content, whether it is images, text files, maps, or any other type of content you choose to use for your site can be stored in folders.

How to create a Folder

Creating a folder is simple.

1. Click on the **Add** button from the left toolbar and choose **Folder** from the pop up menu.
2. Put a title for your new folder in the **Title** line in the **Add Folder** pop up.
3. Click **Create and Edit**. (Figure 1)

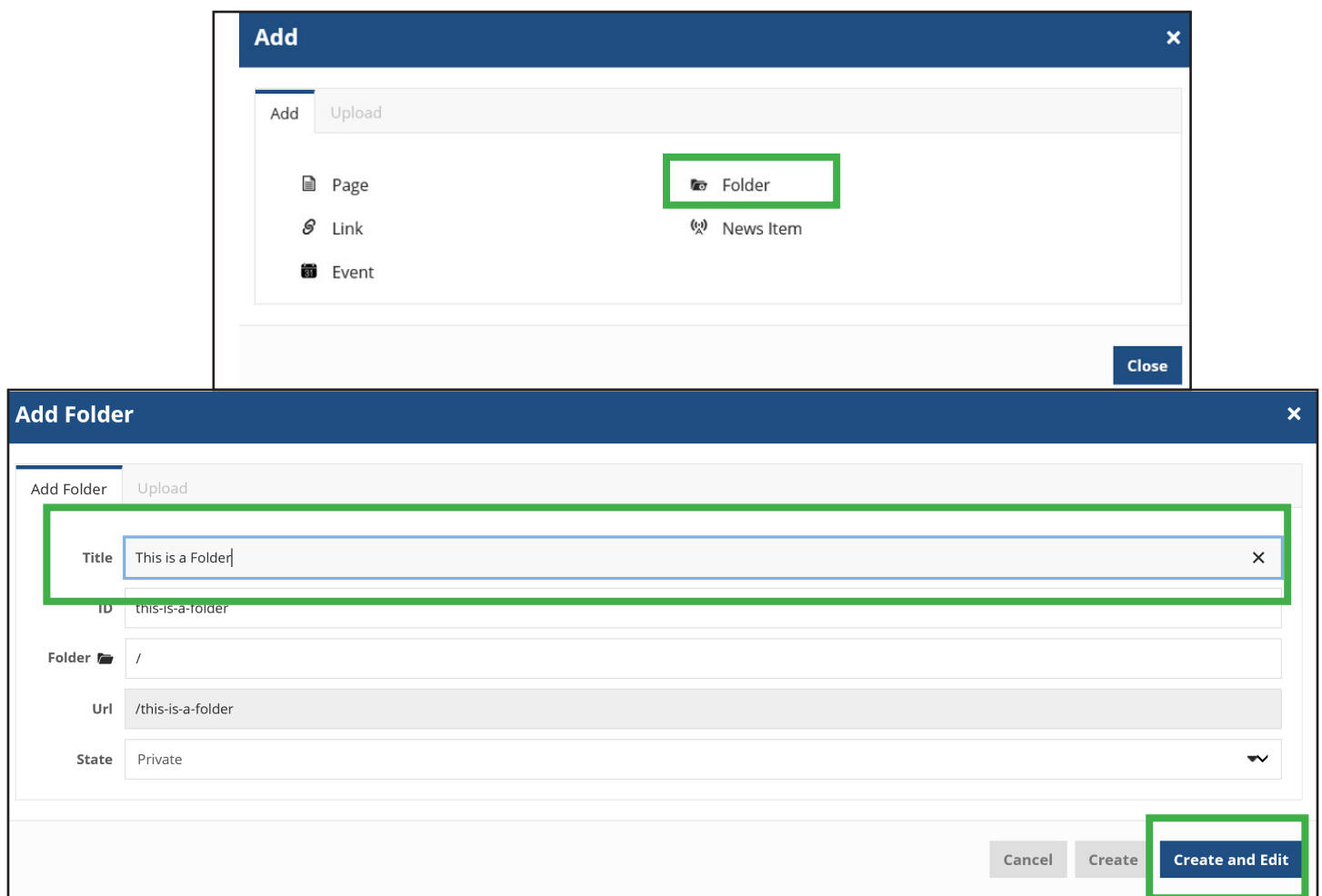


Figure 1

You have now created a folder and you can start adding content into the folder.

Adding Content to a Folder

There are two ways to add content to folders. Which you use will depend on the type of content you are trying to add. If you would like to add any of the main types of content which are pages, links, events, folders, or news items navigate to the folder you wish to add content to and click the Add button from the left toolbar. (Figure 2)

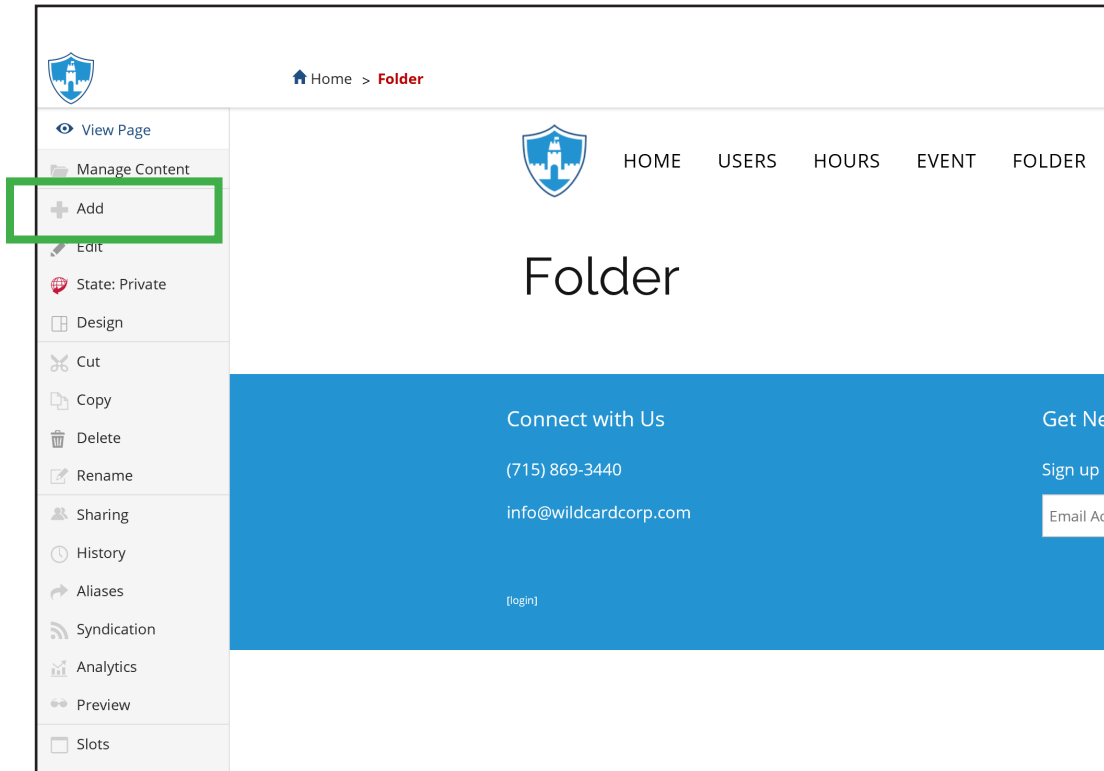
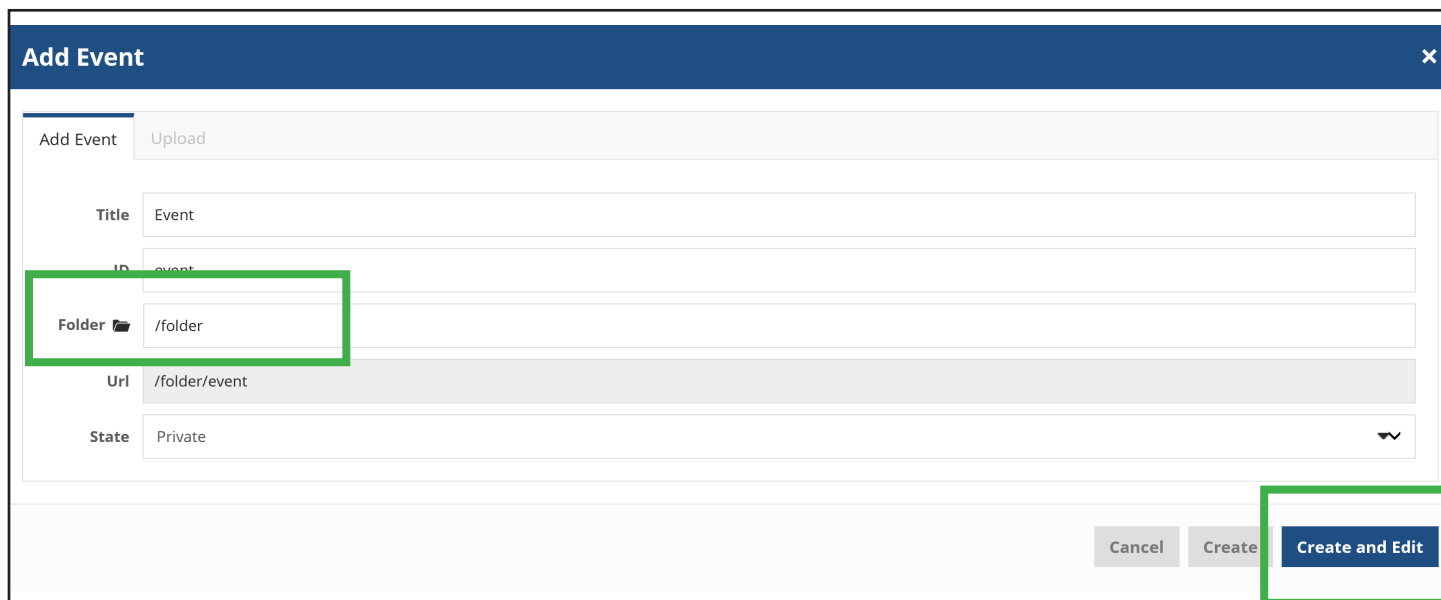


Figure 2

Choose the content type you want to add. You can find a detailed description on how to add different types of content in the Adding Content section of this manual. You will need to add a title in the title line as you would any time you create new content. Notice the folder text box is now filled in and shows that the new content has been added into a folder. (Figure 3)



The screenshot shows a modal window titled "Add Event" with a close button (X) in the top right corner. Below the title bar, there are two tabs: "Add Event" (active) and "Upload". The form contains several fields: "Title" (with the value "Event"), "ID" (with the value "event"), "Folder" (with the value "/folder", highlighted by a green box), "Url" (with the value "/folder/event"), and "State" (with the value "Private" and a dropdown arrow). At the bottom right, there are three buttons: "Cancel", "Create", and "Create and Edit" (highlighted by a green box).

Figure 3

Click the **Create and Edit** button. The top folder shows up in the navigation bar. If you click on this folder you will then see the content you added to the folder. It looks like a link. Click on it and you can see the content. (Figure 4)

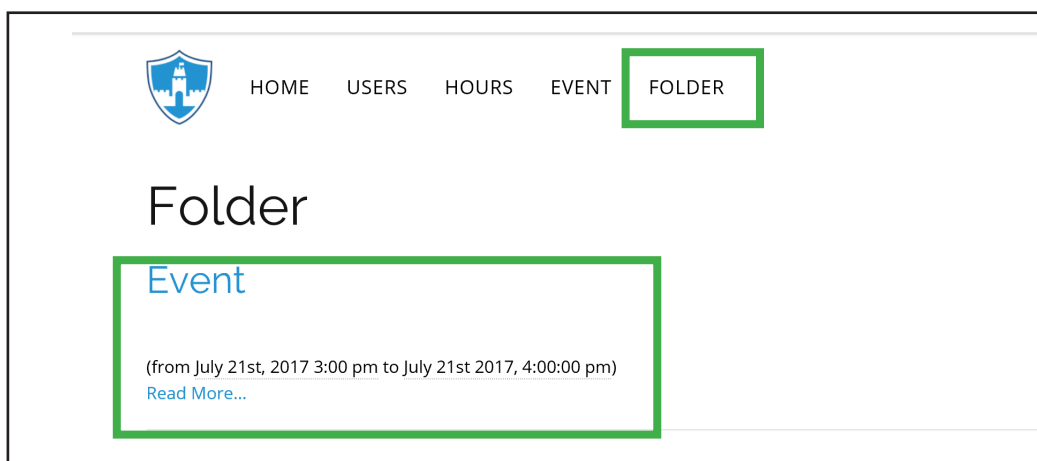


Figure 4

You can also add content to folders using edit mode. Navigate to the folder you want to edit and click **Edit** from the left toolbar. You will then be in edit mode. Editing a folder works the same way as editing a page. You can find a more detailed description of how to edit content in the Editing Content section of this manual. You can use the **Insert** menu in the edit mode to add content to your folders.

You can also add new folders inside of existing folders. Navigate to the folder you want to work with and click the **Add** button from the left toolbar. Choose folder from the pop up menu. You now have a new folder within the folder you were working with.

How to use the Folder system for Organization

The folder system works the same way as filing cabinet does. You have a number of folders each with different subjects marked on them. Inside these are the files that pertain to that subject. You can do the same thing on your website with the folder system.

The first step is to decide what are the most important topics you want your audience to know. You would make these your top folders. For example if you are making a website for a bakery you would want your audience to know:

1. What are your hours
2. Where are you located
3. Information about your business
4. What is on your menu.

You would make four folders:

Hours
Location
About
Menu

These would then create the top level of your site navigation. Into each of these folders you would put the pertinent information. For example you may have a PDF of your menu you would like to put on your site. Upload the file into the Menu folder. Keeping everything organized this way makes things much easier if you need to make changes or if more than one person is making changes to the site.

Obviously this is a very simplified version of how a folder system would work. A larger site such a government or huge corporation would have a much more complicated folder system but the basics are the same. The more organized your site if the easier it is to manage.

Conclusion

If you would like more information on Castle CMS go to <https://castlecms.io>.

Here you will find highlights and frequently asked questions about Castle CMS. You can also request a demo.

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