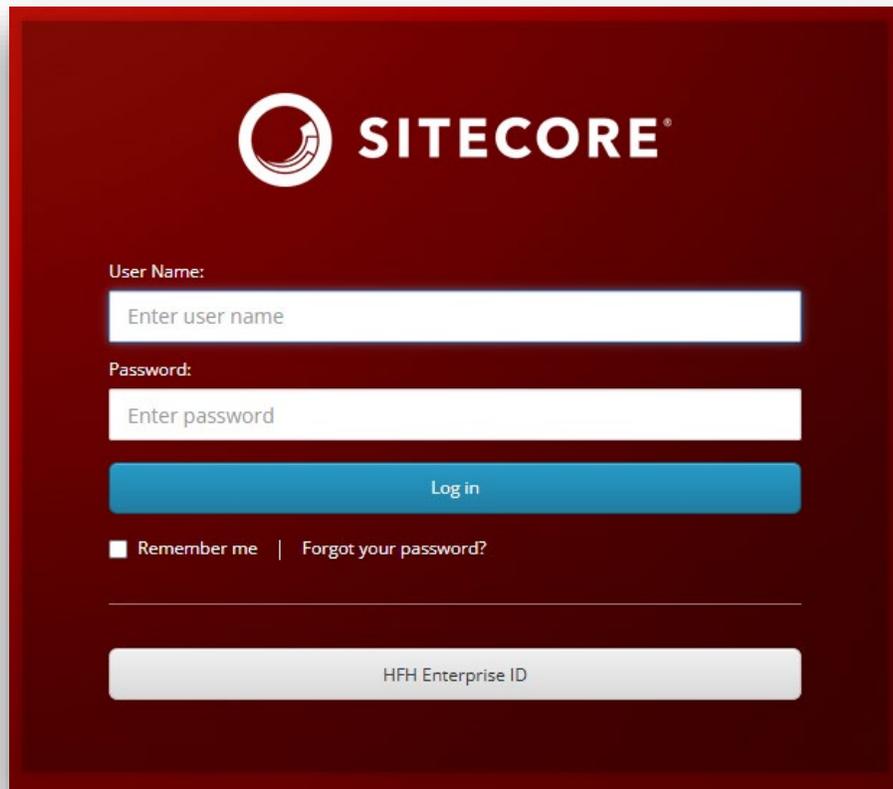


CALENDAR & EVENTS FOR ADMINS - Sitecore 10

Logging into Sitecore

The image shows a Sitecore login interface with a dark red background. At the top left is the Sitecore logo, which consists of a white circle with a stylized 'S' inside, followed by the word 'SITECORE' in white capital letters. Below the logo, there are two white input fields. The first is labeled 'User Name:' and contains the placeholder text 'Enter user name'. The second is labeled 'Password:' and contains the placeholder text 'Enter password'. Below these fields is a blue button with the text 'Log in'. Underneath the button, there is a checkbox labeled 'Remember me' and a link that says 'Forgot your password?'. At the bottom of the form is a white button with the text 'HFH Enterprise ID'.

1. Visit: <https://prod-cm.henryford.com/sitecore/login>
2. Click **HFH Enterprise ID** to log into Sitecore. Enter your **HFH Corporate email** and **password** when prompted.
3. It is recommended that you use either **Chrome**, **Mozilla** or **Edge**.

The Launchpad – The Experience Platform

Note: Based on the access rights of your account and role, your launchpad may look different. If you do not see the launchpad on login, click on the grid icon in the top left corner.



Sitecore Experience Platform

The screenshot displays the Sitecore Experience Platform Launchpad interface. It is organized into four main sections, each with a title and several application tiles:

- Marketing Applications:** Contains three tiles: "Forms" (with a list icon), "Campaign Creator" (with a megaphone icon), and "Marketing Control Panel" (with a circular refresh icon).
- Content Editing:** Contains four tiles: "Content Editor" (with a feather icon), "Experience Editor" (with a wrench icon), "Media Library" (with a document icon), and "Workbox" (with a list icon).
- Recycle Bin:** Contains one tile: "Recycle Bin" (with a trash can icon).
- PowerShell Reports:** Contains one tile: "PowerShell Reports" (with a circular refresh icon).
- Control Panel:** Contains two tiles: "Control Panel" (with a gear icon) and "Desktop" (with a monitor icon).

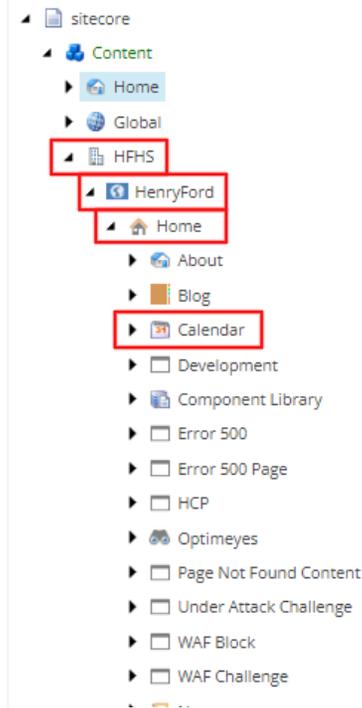
Navigating to your Calendar Module

To Start Editing your Physician Directory

1. Select the **Content Editor** button.
 - To start editing from the backend select the **Content Editor** button

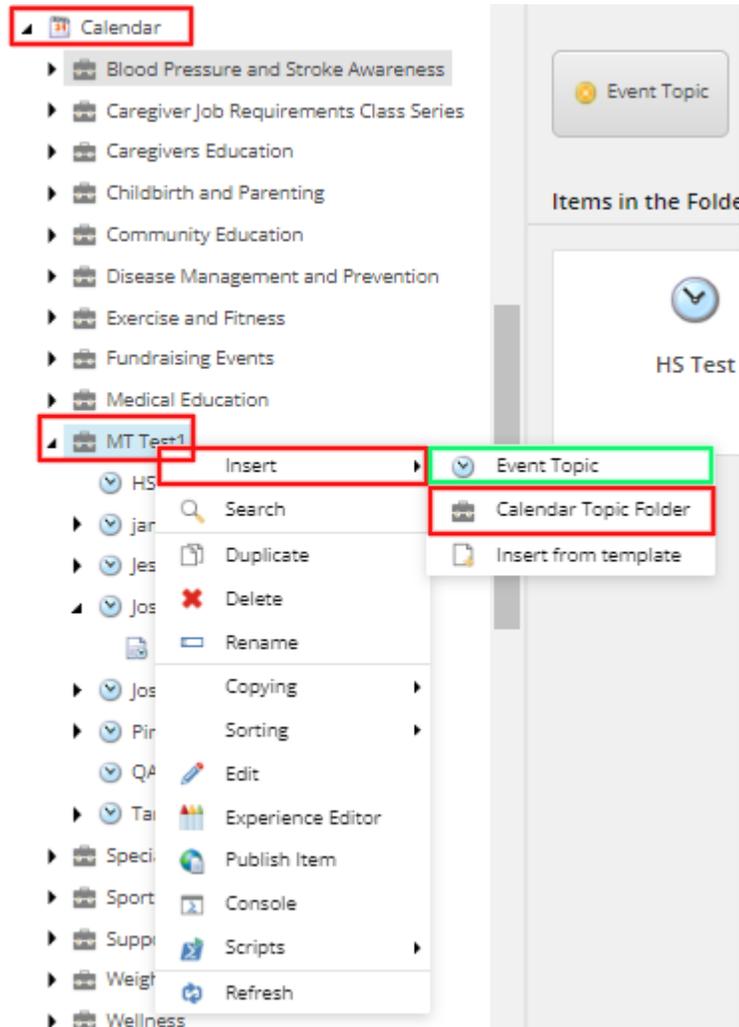


2. The Content Tree contains all your website's pages, items, and modules (including Calendar).
 - Note: The Calendar Events and Topics will be found under the Content > HFHS > HenryFord > Home > Calendar folder.
 - Setup your Content Editor with the appropriate settings and menus by opening the **View** ribbon and having the following checkboxes checked:
 - Content Tree (checked by default)
 - Entire Tree



Adding a New Event

1. Select the **Calendar** module, right-click it, and then select **Insert**.



From here you can:

- Insert a **Calendar Folder** (red) – using this is highly recommended to help organize your events based on service lines, dates, categories, or departments.
- Insert an **Event Topic** – (green) use this option to create an event with one registration price.

2. After creating a new event, enter a name for the event.

Note: this name will be part of the event detail page's URL.

Message ✕

Enter a name for the new item:

OK Cancel

Adding Event Details

1. Page Data fields:

- **Headline** (Red) – Click inside the field to edit the displaying title of the page; this defaults to the name given when creating the event profile.

Note: do not include the word "success" it will conflict with the payment gateway

- **Introduction** (Orange) – a short summary about the event for your website's Site Search only and it will not display on the web page; click **Show Editor** to open up the **Rich Text Editor** to edit or enter text. **Please refer to the Rich Text Editor section at the bottom of this document for information on how to properly format text.**

Note: if this field is left empty, the system will automatically use the first 150 characters of your content copy

- **Content Copy** (Green) – any relevant information about the event such as a detailed summary of the class; click **Show Editor** to add content.

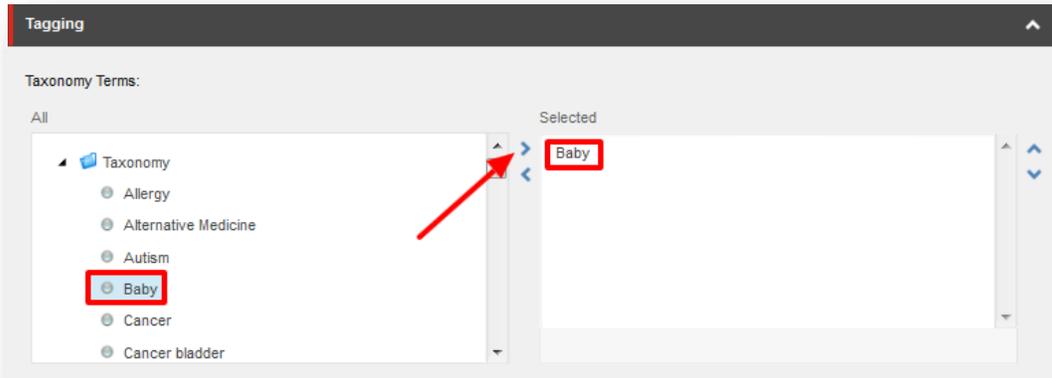
The screenshot shows a 'Page Data' form with three main sections, each highlighted with a colored border and containing a 'Show editor' link with a yellow arrow pointing to it:

- Headline:** A red-bordered box containing the text 'Birthing Class Basic'. A red arrow points to the 'Show editor' link.
- Introduction:** An orange-bordered box containing the text 'Intro to Basic Birthing class'. Above the text are links for 'Show editor', 'Suggest fix', and 'Edit HTML'. A yellow arrow points to the 'Show editor' link.
- Content Copy:** A green-bordered box containing the text 'This class will teach you the basics of child birth.' followed by two paragraphs of placeholder text. Above the text are links for 'Show editor', 'Suggest fix', and 'Edit HTML'. A green arrow points to the 'Show editor' link.

2. Tagging fields:

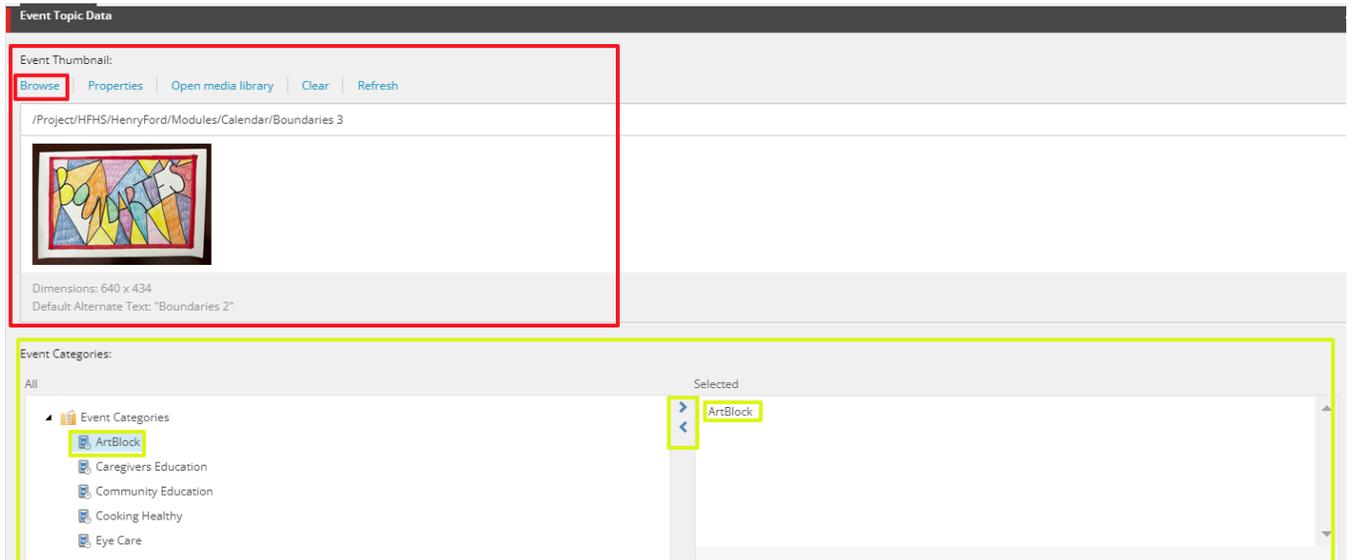
Depending on how your website is set up, you may choose to use one, multiple, or none of these fields. Associate the event to the tag item(s) by highlighting the term(s) on the left side (**All**) and moving it over to the right side (**Selected**) by using the blue arrows.

Note: please contact your administrator if uncertain on how to proceed.



3. Event Topic Data:

- **Event Thumbnail (Red)** – click **Browse** to select a thumbnail image from the media browser.
- **Event Categories (Orange)** – select a category or categories that are associated with the event by using the blue arrows to move an item from **All** to **Selected**.



- **Event Contact Name** (Red) – click inside the field to add the name of the event contact
- **Event Contact Phone** (Orange) – click inside the field to add the phone number of the event contact
- **Event Contact Email** (Green) – click inside the field to add the email of the event contact

Event Contact Name:	C.A.R.E. Program
Event Contact Phone:	866-574-7530
Event Contact Email:	CaregiverResources@hfhs.org

4. **Registration Data** fields:

- **Requires Registration** (Red) – if checked, then user must complete registration form to register for the event
- **Registration Instructions** (Orange) – additional registration information can be added here; click **Show Editor** to edit or enter information
- **Email Notification** (Green) – click inside the field to add the email of the person that should be notified when someone registers for the event
- **Fee** (Blue) – click inside to enter the cost of the event
- **Custom Email Text to Registrants:** (Screenshot below – appears under Registration Instructions) – Allows a custom message to be added in the automated email to the attendee when registering for an event. **Please refer to the Rich Text Editor section at the bottom of this document for information on how to properly format text.**

The screenshot shows the 'Registration Data' form with several fields highlighted by colored boxes:

- Requires Registration:** A checkbox labeled 'Requires Registration' is checked and highlighted with a red box.
- Registration Instruction:** A text area containing 'Registration instructions.' is highlighted with a yellow box. Above it are three links: 'Show editor', 'Suggest fix', and 'Edit HTML'. A yellow arrow points to the 'Show editor' link.
- Email notification - Email Address:** A text input field containing 'moro@hfhs.com' is highlighted with a green box.
- Fee:** A text input field containing '36' is highlighted with a blue box.

The screenshot shows the 'Custom Email Text to Registrants' form:

- Label: 'Custom Email Text to Registrants:'
- Links: 'Show editor', 'Suggest fix', and 'Edit HTML' are displayed in a row.
- Text Area: A large, empty text area for entering the custom message.

5. **Premium Registration Data** fields:

- **Promo Codes** (Red) – select the promo code from the **All** column using the blue arrows to add to the **Selected** column
- **Send Reminder Days Before** (Orange) – when the system should send a reminder email to the registrants
- **Internal Code** (Green) – depending on your organization, use this field to enter an internal number for billing

***Note:** do not include the word "success" it will conflict with the payment gateway*

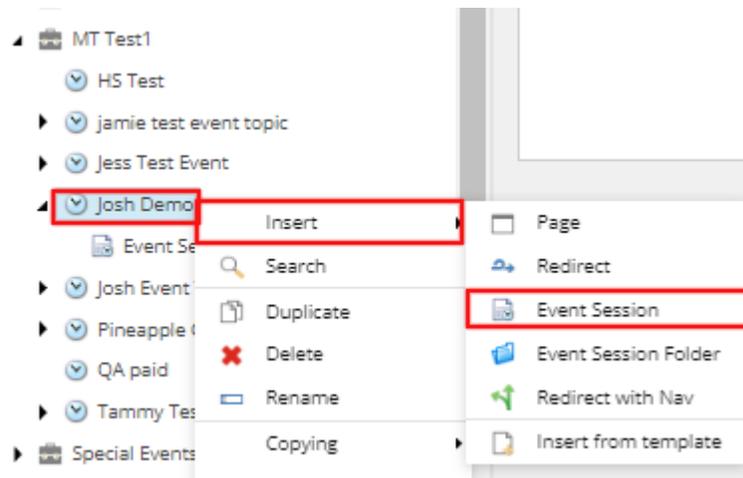
- **Additional Form** (Blue) – some events require additional registration information and additional custom forms can be added using this dropdown.
- **Additional Form Height** - No longer included or necessary.

The screenshot shows the 'Premium Registration Data' form. At the top, there is a 'Promo Codes' section with two columns: 'All' and 'Selected'. The 'All' column contains a tree view of promo codes, with 'HealthClub' highlighted by a red box. A red arrow points from 'HealthClub' in the 'All' column to the 'Selected' column, which also contains 'HealthClub' highlighted by a red box. Below this, there are four input fields, each highlighted with a different colored box: 'Send Reminder Days Before' (orange box, value: 2), 'Internal Code' (green box, empty), 'Additional Form' (blue box, empty), and 'Additional Form Height' (purple box, empty). The 'Additional Form Height' field has a small text description: 'Additional Form Height - in pixels (est. 50 per field + 100 for title and button):'.

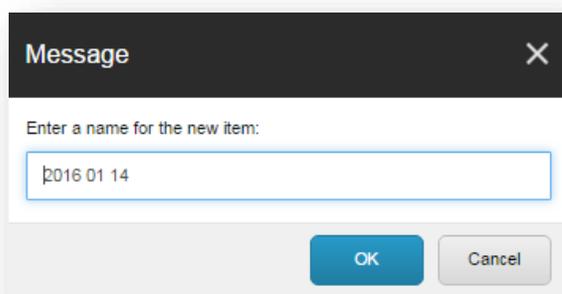
6. The next step is to add **Event Sessions**. Without active sessions, the event will not display on the front-end of the website.

Adding an Event Session

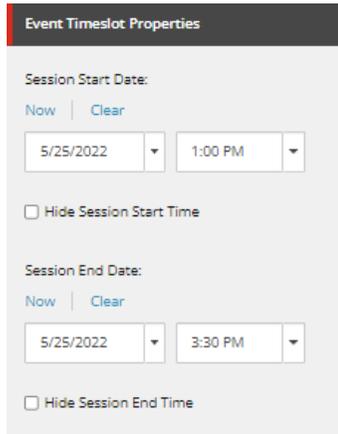
1. Select the event that you want to add sessions to. Right click on the event, select **Insert** and then select **Event Session** (insert **Event Session Folder** to organize and group the sessions such as the year or month of the sessions).



2. Name your event session when prompted and then click OK.

A screenshot of a 'Message' dialog box. The title bar says 'Message' with a close button (X). The main text says 'Enter a name for the new item:'. Below this is a text input field containing the text '2016 01 14'. At the bottom, there are two buttons: 'OK' and 'Cancel'.

3. Fill in the **Event Timeslot Properties** in the **Event Timeslot Properties** section of the new session:
 - **Session Start Date** – Type date and time in each box or select from calendar menu by clicking the arrows.
 - **Session End Date** – Type date and time in each box or select from calendar menu by clicking the arrows.



The screenshot shows a form titled "Event Timeslot Properties". It contains two main sections: "Session Start Date" and "Session End Date". Each section has a "Now" link and a "Clear" link. Below these are two dropdown menus for the date and time. The "Session Start Date" section shows "5/25/2022" and "1:00 PM". Below it is a checkbox labeled "Hide Session Start Time". The "Session End Date" section shows "5/25/2022" and "3:30 PM". Below it is a checkbox labeled "Hide Session End Time".

4. Fill in the **Event Session Data** fields in the **Content** tab of the new session:
 - **Event Location** (Orange) – select the location of the event using the dropdown.
 - **Virtual Online Link** (Green) – If the event is online, you can leave the Event Location field blank and add a Virtual Online Link which will display in place of the Event Location.
 - **Is Ongoing** (Red) – check this box if the event is an ongoing event (*for example, a yoga class that occurs all year round and the registrant can attend any session*)
 - **Attending Dates information** (Orange) – Click **Show editor** to enter additional dates of the event if it is a series.

Event Session Data

Event Location:

Event Locations/Albion Public Library

Virtual Online Link:

[Insert link](#) | [Insert media link](#) | [Insert external link](#) | [Insert anchor](#) | [Insert email](#) | [Insert JavaScript](#) | [Follow](#) | [Clear](#)

Is Ongoing - Does not use Start and End date/times

Attending Dates Information:

[Show editor](#) | [Suggest fix](#) | [Edit HTML](#)

Go up the stairs, the event is in the conference room in the back.

5. **Registration Data** fields:

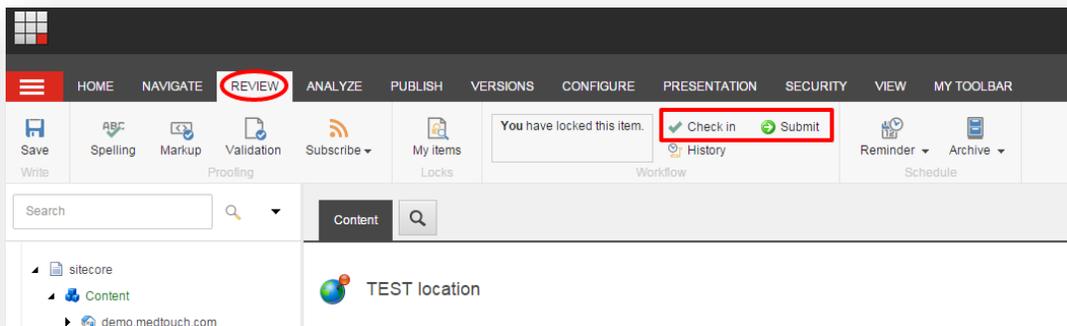
- **End Date** (Red) – last day to register for this session (*registration will close on this date*)
- **Capacity** (Orange) – the number of allowed registrants for this session
- **Promo Codes** (Green) – select the promo code(s) using the blue arrows to move from **All** box to the **Selected** box
- **Reminder Set Time** (Blue) – This field will no longer appear.
- **Wait List Capacity** (Purple) – enter maximum size of wait list in the field

The screenshot shows the 'Registration Data' form with the following fields and annotations:

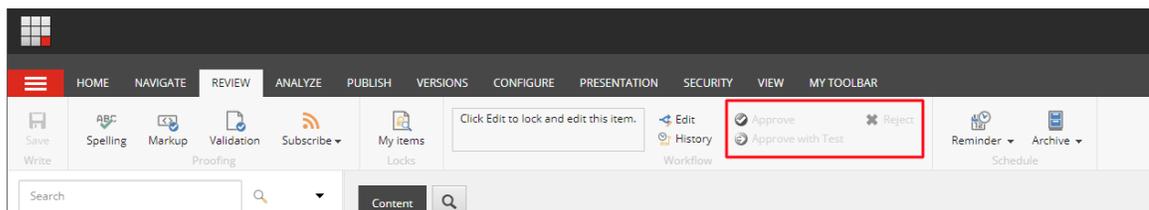
- End Date:** A red box highlights the date and time dropdowns. The date is '12/18/2016' and the time is '5:00 PM'. Red arrows point to the date and time dropdown menus.
- Capacity:** An orange box highlights the input field containing the number '15'.
- Promo Codes:** A green box highlights the entire section. It shows an 'All' list on the left with 'HealthClub' selected and highlighted in green. A green arrow points to the right-pointing arrow button between the 'All' and 'Selected' lists. The 'Selected' list on the right contains 'HealthClub', which is also highlighted in green.
- Reminder Sent Date:** A blue box highlights the date and time dropdowns. The date is '12/14/2016' and the time is '12:00 PM'. Blue arrows point to the date and time dropdown menus.
- Wait List Capacity:** A purple box highlights the input field containing the number '5'.

Submitting Your Item through the Workflow

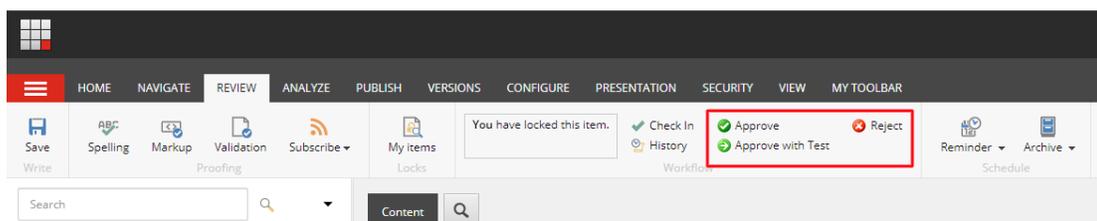
1. When you are done with your edits and have saved your work, from the **Review** tab you can:
 - a. **Check In:** “unlock” the page from your account and make it available for other users to “lock” the page to their account; this action will keep the current version as Draft and therefore will not be published.
 - b. **Submit:** sends the most recent version to the staging area for an approval to be published by a publisher or an administrator.



2. If you have Publishing rights or are an Administrator, then you will see the disabled **Approve** and **Reject** buttons immediately appear after Submitting your page. To enable the buttons, select Edit.

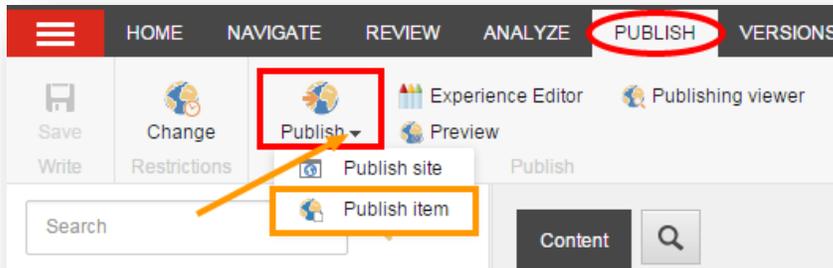


3. When you click **Approve**, the page will be staged for Publishing and when you click **Reject**, it will send the page back to the workflow as a Draft and will not be published.

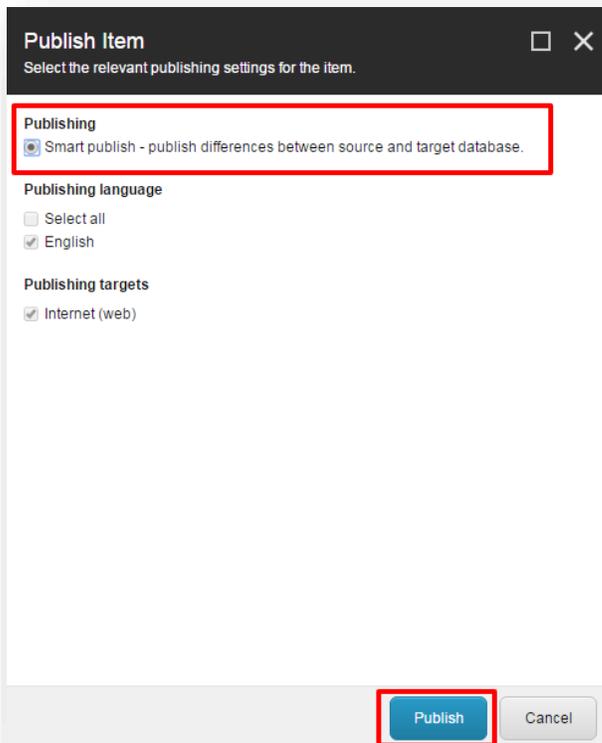


How to Publish Your Item

1. Select the item or page that you want Publish, open the **Publish** ribbon and then click the **Publish** button (Red) or click the down arrow. Then select **Publish Item** from its drop down menu (Orange).

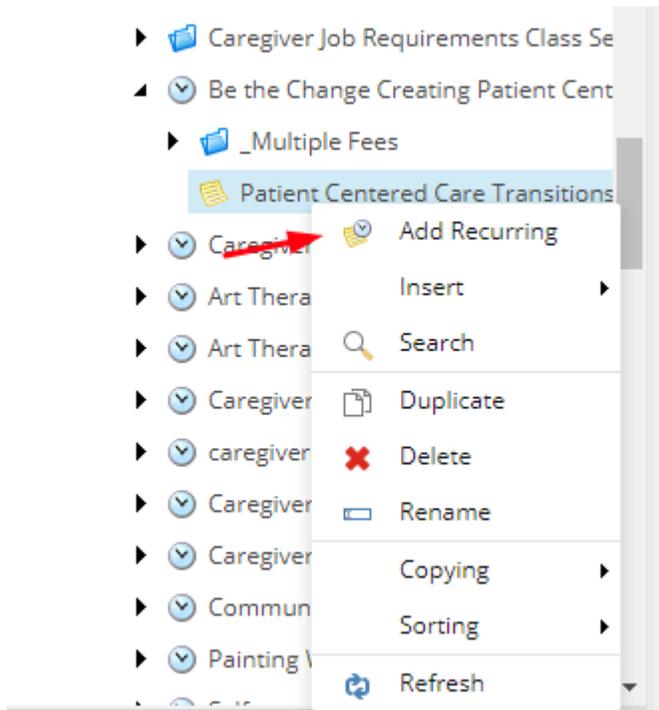


2. Click **Publish** to publish the item, its sub-items, and related items.



Appendix I: Setting Up a Recurring Event

1. Create the event and add one session to the event that will have recurring sessions. ***Note:** the first session created is counted as the first session of the recurring series. Use this option to setup recurring sessions occurring after the first session.
2. Select and highlight the first session (NOT event topic) and right click the first event session under the event topic and select **Add Recurring**.



3. Recurring events can be setup by:

Add Recurrence
□ ×

Add Recurrence

Weekly Recurrence
 Sunday
 Monday
 Tuesday
 Wednesday
 Thursday
 Friday
 Saturday

Monthly Recurrence

 Day of month, use Start Date

 The

Range of recurrence

Start:

Repeat Times

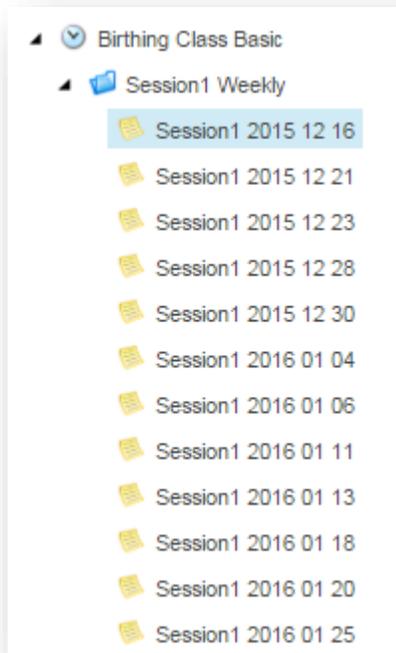
 End Date

- **Weekly Recurrence** – sessions that will recur multiple times a week; check the days that the event will occur.
- **Monthly Recurrence** – sessions that will recur multiple times a month; select the date (*for example, 14th, 22nd, etc.*) of the month that the event will occur or select the day (*for example, Monday, Tuesday, etc.*) of the month that the event will occur.

- **Range of Recurrence** – enter the start date of the recurrence and select the frequency of repeat or select and define an end date for the recurrence.

When done, select **OK**.

4. If setup correctly, a folder will appear under the first session with dated recurring session items in it. *Each Session data can be edited manually without issues.

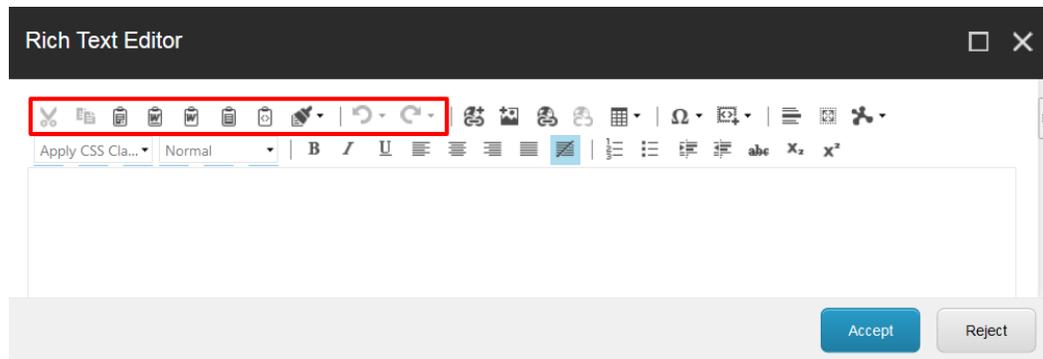


5. When done, click **Save** and **Publish** the parent Event to push to live.

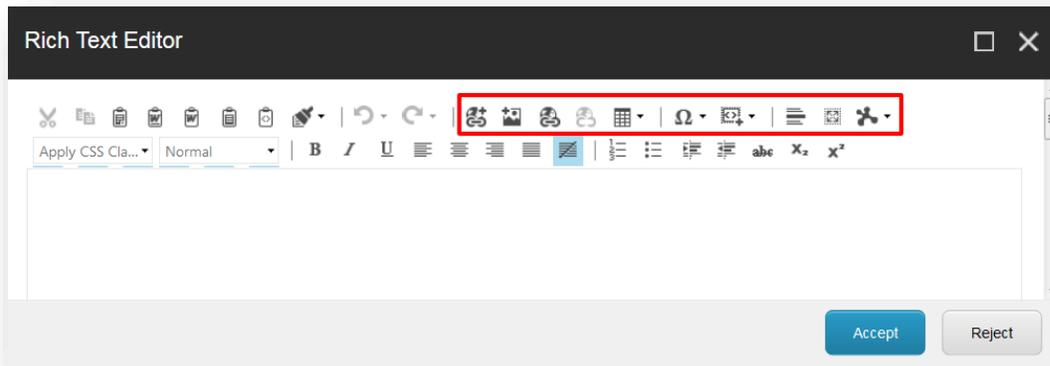
Using the Rich Text Editor

The Rich Text Editor is also known as the WYSIWYG (What You See Is What You Get) and functions mainly like a word program. You can click right inside the field and start typing. The first part of this section will cover each section of buttons from left to right.

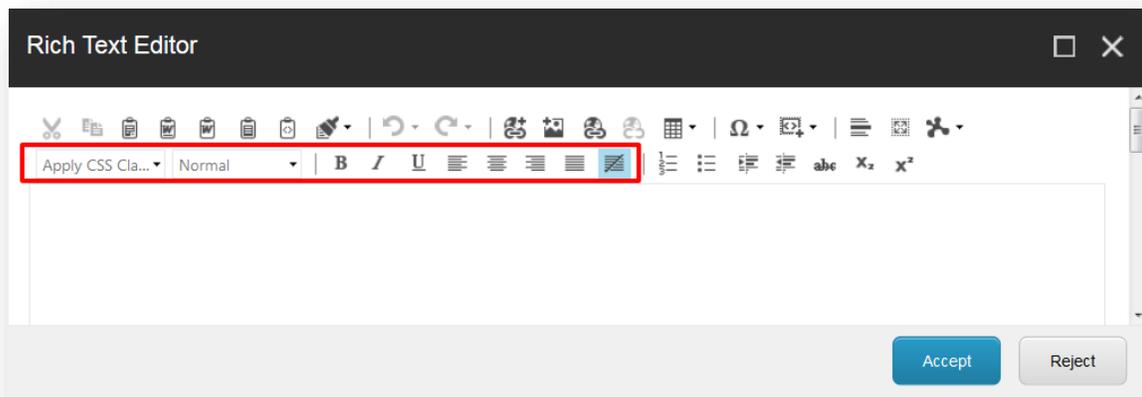
Note: hovering your mouse over each button will reveal its function name.



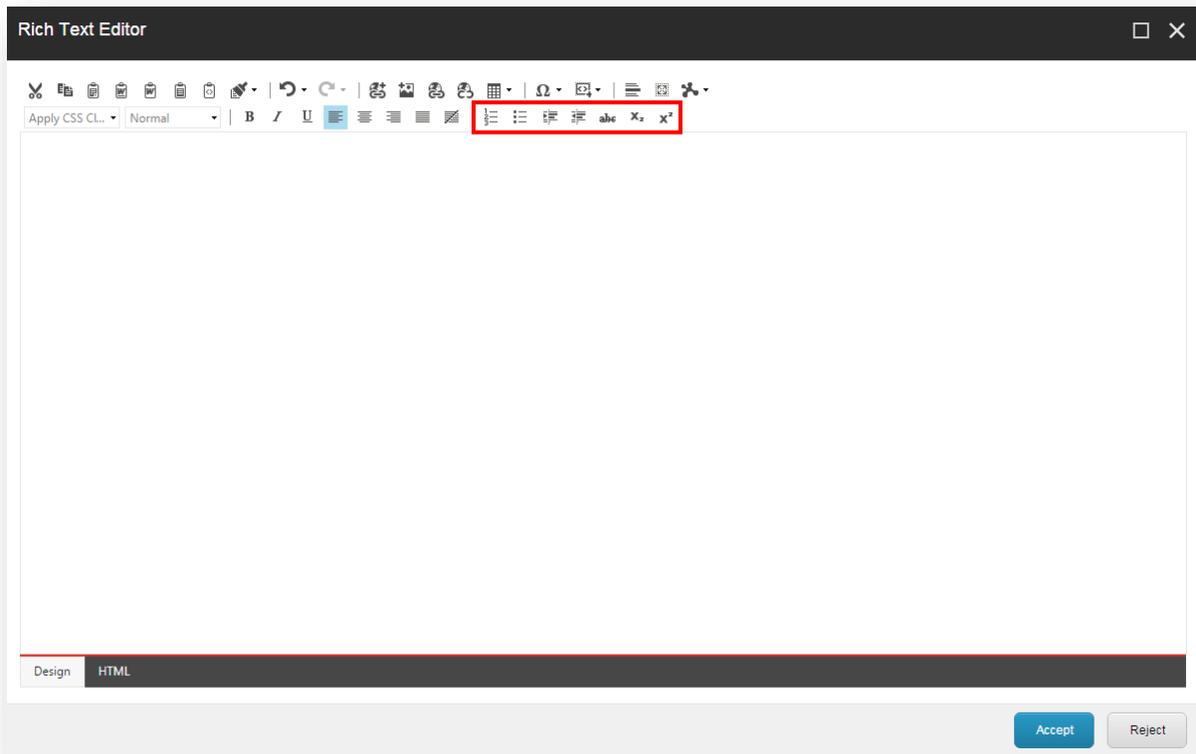
- **Cut:** cut the selected text and save for immediate pasting.
- **Copy:** copy the selected text and save for immediate pasting.
- **Paste:** paste the selected text that was cut or copied.
- **Paste from Word:** paste cut or copied content copy from a Word Document.
- **Paste from Word – Strip Font:** strips the formatting of the cut or copied content copy from a Word Document and then pastes.
- **Paste as Plain Text:** paste cut or copied content copy from any source without any formatting or font codes carried over (**this is the recommended solution when placing content from another source**).
- **Paste as HTML:** paste your content for this page in HTML format.
- **Format Stripper:** strip formatting (bold, italics, underline, etc.) from your content.
- **Undo:** undo your last action.
- **Redo:** redo your last action.



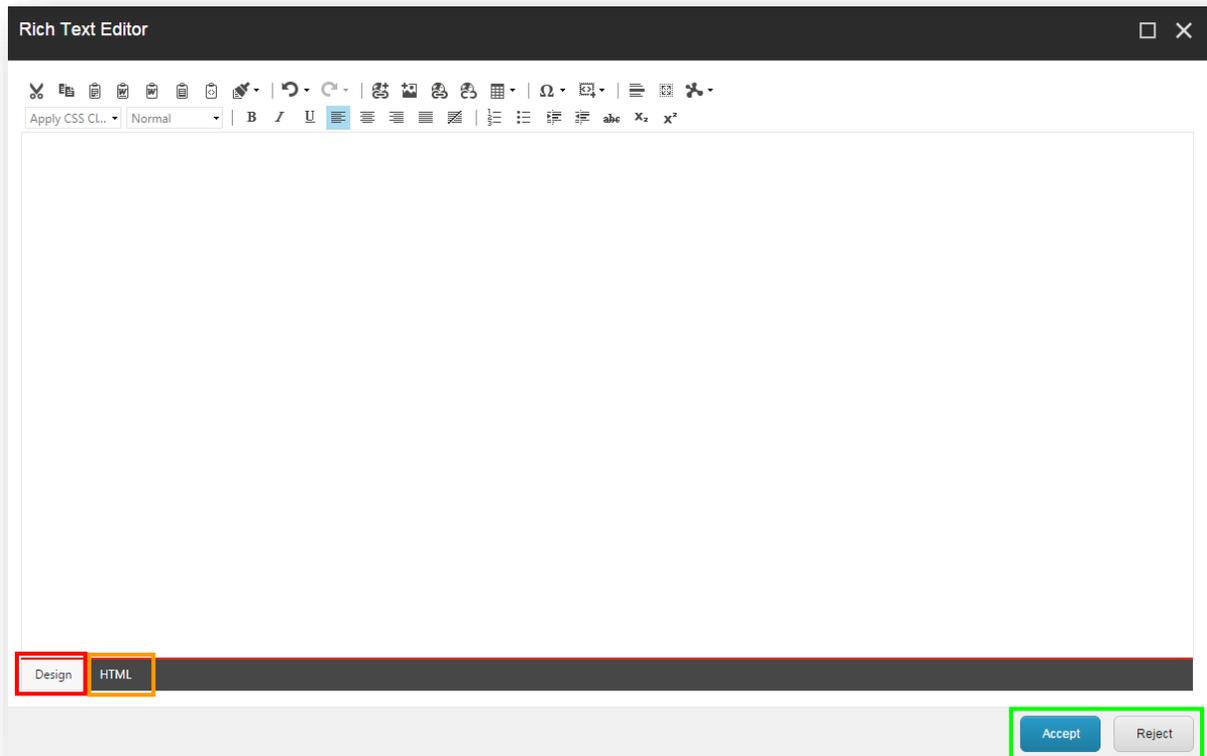
- **Insert Sitecore Link:** link the selected text to another page within your site or to a PDF document.
- **Insert Sitecore Media:** inset images, videos, audio files, etc. to the selected area in the content copy.
- **Hyperlink Manager:** link the selected text to an external URL (any page outside of your site like Google.com), an anchor on the page, or open a “mail to” email.
- **Remove Link:** remove the link(s) in the selected text.
- **Insert Table:** add a table to the page.
Note: verify that your tables are responsive if you have responsive design.
- **Insert Symbol:** insert various symbols and special characters.
- **Insert Code Snippet:** add a pre-loaded HTML component to the page such as a callout.
Note: custom HTML codes can be pre-loaded into this section by your System Administrator.
- **Horizontal Rule:** insert a horizontal rule; a straight line across the page for separation of content.
- **Select All:** select all items in the Rich Text Editor.
- **Module Manager:** view and edit Sitecore modules.



- **Apply CSS Class:** add a custom CSS class to change the font style or color.
Note: custom CSS class can be pre-loaded into this section by your System Administrator.
- **Paragraph Style:** define the style of the new or selected paragraph; use this to model your content with sub-category headers (<h2>, <h3>, <h4>...).
- **Bold, Italic, Underline:** These 3 options will allow you to format the text in Bold, italic or underline.
Note: limit the use of underline as it gives the appearance of a link.
- **Align Left, Align Center, Align Right, and Justify:** left align, center align, and right align your paragraph of text, or block justify your paragraph of text.
- **Remove Alignment:** remove the previously selected alignment.



- **Numbered List:** start a new numbered list or convert selected paragraphs to a number list.
- **Bulleted List:** start a new bulleted list or convert selected paragraphs to a bulleted list.
- **Indent/Out-dent:** indent or out-dent the paragraph of text.
- **Strikethrough:** place a line through the selected text.
- **Subscript:** add small text font on the bottom right.
- **Superscript:** add small text font on the upper right.



- **Design (Red):** displays the entered text like a word program.
- **HTML (Orange):** displays the entered text in HTML.
- **Accept:** accept the changes you made in the Rich Text Editor and close it.
Note: clicking Accept does not Save the page.
- **Reject:** reject the changes you made in the Rich Text Editor and close it.

Remember: All updates made to classes and event need to be submitted through workflow and published to become available.