EPiSERVER 7

CMS

User Guide

Administrators, Version 7.1

User Guide for Administrators – EPiServer 7.1 CMS
Revision A, 2013

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Introduction

EPiServer CMS is a content management platform based on standard technology, allowing you to publish information on a website quickly and easily. EPiServer CMS provides a user-friendly, web-based platform that you can access anytime, anywhere.

About this Documentation

This user guide provides guidance to the usage of the various functions of EPiServer CMS, both for managing content as well as administrating your website. To find out more about how to integrate, develop and extend the functionality of EPiServer CMS, refer to the *EPiServer CMS SDK*.

The described functions as well as the screen shot examples shown in this documentation are based on a standard installation. Treat any displayed data in the examples purely for illustration purposes.

Screen shot examples as well as glossary links are only displayed in English.

Accessing EPiServer Help System

You can access the web help from the Global Menu. Click the **?** icon and select the system for which you want to view the help. Browse or search for the topic where you need guidance.

You can also access the web help by browsing to *EPiServer Web Help*.

From each view in the user interface with a help icon provided, click the icon to get context-sensitive help.

Online Community on EPiServer World

EPiServer World is an online community where you can find the latest product information. It is open to the public, for partners, customers, and everyone working with EPiServer products, such as editors, webmasters, site owners and developers. Here you can download material, participate in discussions, read articles, receive support and much more. Feel free to sign up as a member.

Copyright Notice

About Cookies Used

Many companies use cookies to track website visitors, personalize content, track leads and ultimately sell more products and services. To protect visitors' privacy when visiting different websites, an EU directive states that site owners are responsible for informing all website visitors about which cookies are used and what they are used for. The website visitors must also approve the cookies to be used (whether first-party or third-party cookies are used).

This means that site owners must inform and explicitly ask each visitor the first time they use the website, if a cookie may be placed on the computer, mobile phone or other terminal equipment. It is not acceptable to solely rely on the visitors' web browser cookie settings.

The following cookies are used by EPiServer CMS:

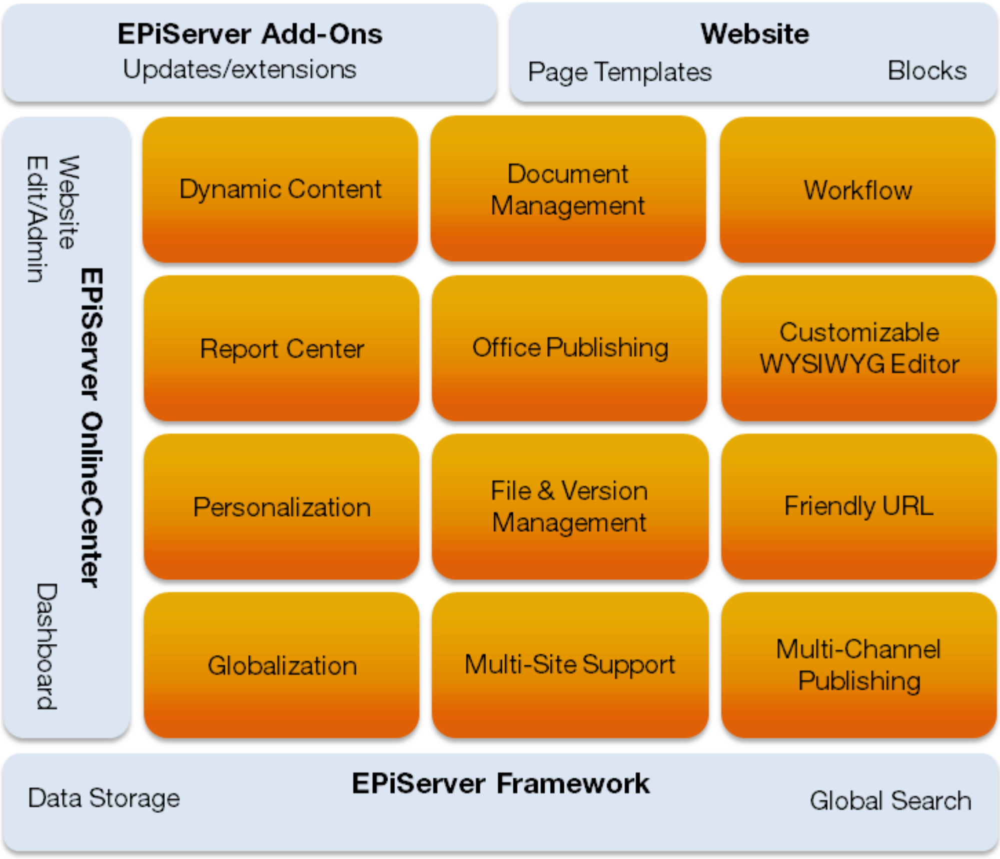
Cookie Name	Purpose
ASP.NET_SessionId	Session cookie sent to the web browser. Used when you open the browser and then go to a website that implements ASP.NET session state. This cookie is deleted when you close your browser.
EPi:NumberOfVisits	Used if you are using the **Number of Visits** personalization criterion. This cookie will not be set if you remove it from all of your visitor groups.
.EPiServerLogin, EPiDPCKEY, .ASPXRoles	Only used if you log in to a website. This is not a major problem as long as you clearly state on the login page that cookies will be used if you log in.

About EPiServer CMS

EPiServer CMS is a powerful yet easy to use content management platform, based on cutting edge technology. The intuitive user interface and superior usability of EPiServer CMS allows both experienced and occasional users to efficiently manage website content.

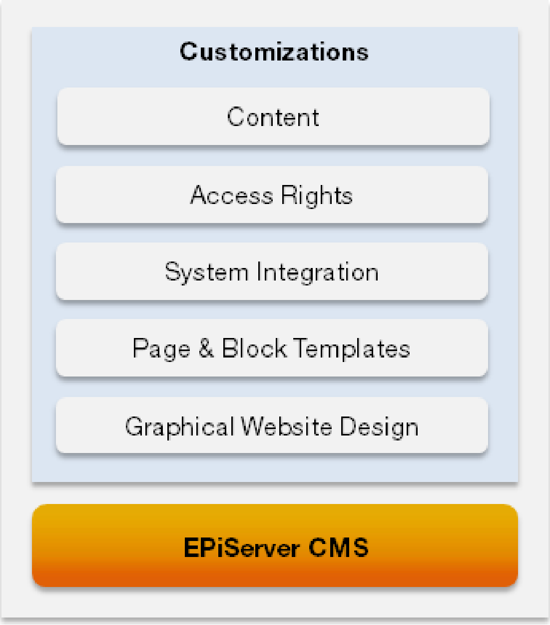
The EPiServer CMS Platform

The EPiServer CMS platform itself consists of service layers for data storing, business logic and presentation functionality, together with providers for pages, users and roles and memberships.



The Customized Website

An EPiServer CMS website is based on a standard platform with editing and administration functionality, on top of which a customized solution is developed.



Customizations typically include the following:

- **Graphical Design**. Implementing website design including style sheets (CSS) defining the graphical appearance of the website and predefined formatting options for editors.
- **Templates and Blocks**. Developing page templates and page and block types for entering and displaying content.
- **System Integration**. If applicable, integrating with other systems for instance an e-commerce or a community module, with a wide variety of integration methods available.
- **Access Rights**. Setting up access rights controlling what editors can do and where on the website.
- **Content Management**. Adding content to the website through import/export and/or creation from scratch.

Function Overview

EPiServer CMS supports the following functions:

- **Content Management**. Features page templates, holding the display functionality of the page, and page and block types defining the properties where content is entered. From the editorial interface editors can change the layout of the web page and content blocks can be reused and shared between pages. The content itself is stored in a database, separated from the layout.
- **Access Rights**. From the administration interface, you can create users and groups, and set access rights for pages, folders, files, languages and page types. You can create “closed” sections on your website for intranets and extranets, and you can enable visitors to register their own account on your site.
- **File Management**. Images, videos and documents used on the website can be stored in one or more separate data sources on the web server, and then made available through the file manager in EPiServer CMS.
- **Version Management**. Maintains a comprehensive version history for pages and files. By default, all versions are retained so that any version can be viewed or rolled back at any given point in time. Page versions can be compared in three different ways, allowing for quick review of changes made to a page.

- **Globalization**. New languages can be activated from the administrative interface, and access levels can be set per language so that editors can only create pages in their authorized languages. Replacement and fallback languages can be defined on page level, allowing for different options when displaying globalized content.
- **Personalization**. Allows marketers to define visitor groups and personalize content for targeted visitors. The personalization feature dynamically adjusts the content based on predefined criteria so you can display adapted content to selected visitors. A number of built-in criteria are available out-of-the box.
- **Multi-Channel Publishing**. Page templates can easily be designed for delivering content to different channels, for instance mobile content and video streaming. Each page template can be set to render content from one or more page types, making it easy for editors to create content for multiple output channels.
- **Workflows**. Offers workflow capabilities for instance to ensure that content goes through an approval process before it is published. Workflow instances and associated tasks are easily managed and monitored from the administration and editorial interfaces, as well as by e-mail.
- **OnlineCenter**. The EPiServer OnlineCenter offers an overview of website operations, as well as convenient access to other integrated systems. A number of customized gadgets can be added to the personalized website dashboard in EPiServer OnlineCenter, to monitor and manage website activities.

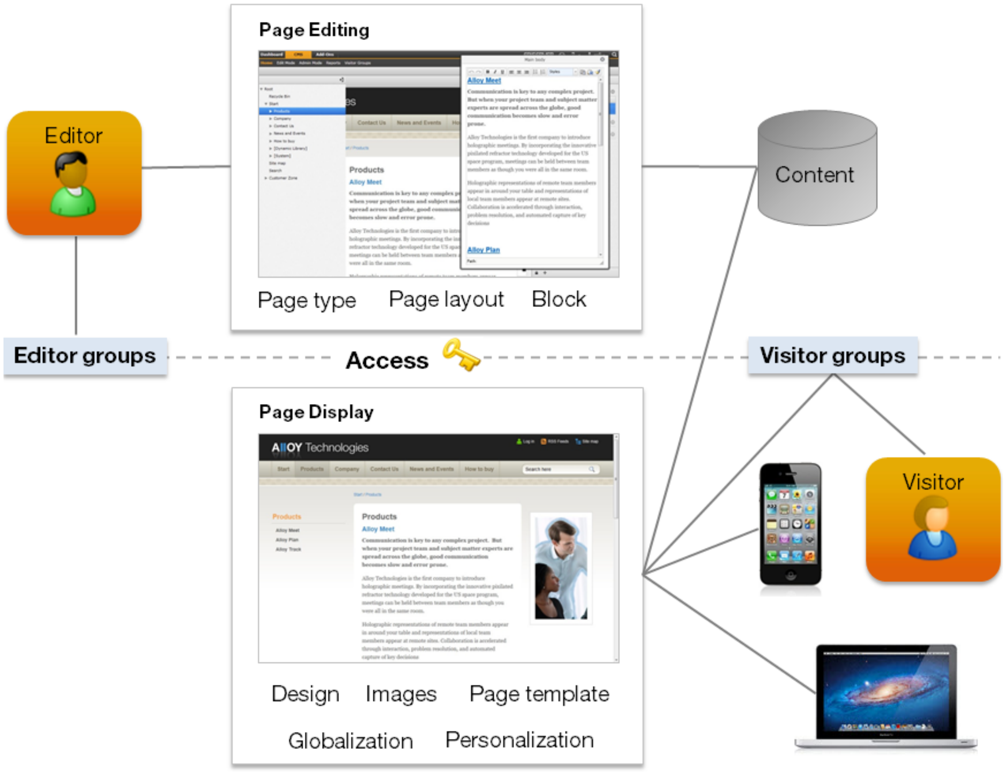
Roles

Setting up and working with an EPiServer CMS website involves a number of different roles, for example, the following:

- **Visitor**. Someone visiting the website by clicking on a page, either anonymously or as a logged in as a registered user with an account.
- **Editor**. Someone creating and editing content on the website with access to the editorial interface. Editors can be either frequent editors or occasional editors, and they may or may not have publishing rights.
- **Website Owner**. Someone with an overall responsibility for one or more websites. Creates content occasionally, monitors website activities and reviews and publishes content. May also be a marketer with a market perspective.
- **Administrator**. Someone responsible for administrative tasks for the website, including the setting of access rights for editors on the website. Usually has full access to both the editorial and administrative interfaces.
- **Developer**. Someone with programming skills working with the setup of the website and the development of new functionality. Creates the page templates, and page and blocks used by editors.

Work Procedure for Creating and Displaying a Web Page

Creating and displaying an EPiServer CMS web page involves a number of functions and procedures, for example, the following:



1. When an editor logs on to the website, the system will control what the editor can do and where on the website.
2. Editors will create content in page types, working with content blocks and page layout. Content such as text, images and links are stored in the database.
3. When a visitor enters the web page, access rights are checked as well as membership in any defined visitor groups and language settings. Depending on these, content starts to load.
4. The graphical design for the website is retrieved together with any images, videos or documents linking to the page.
5. The final web page is assembled and displayed using the appropriate page template, depending on the display device selected by the visitor accessing the page.

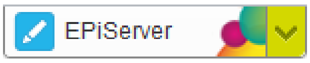
Getting Started

This section describes how you log in to EPiServer CMS. There are several possible login procedures, you can log in on the website as an editor or administrator, or be logged in automatically.

Contact your system administrator to find out what is applicable to your website.

Logging In

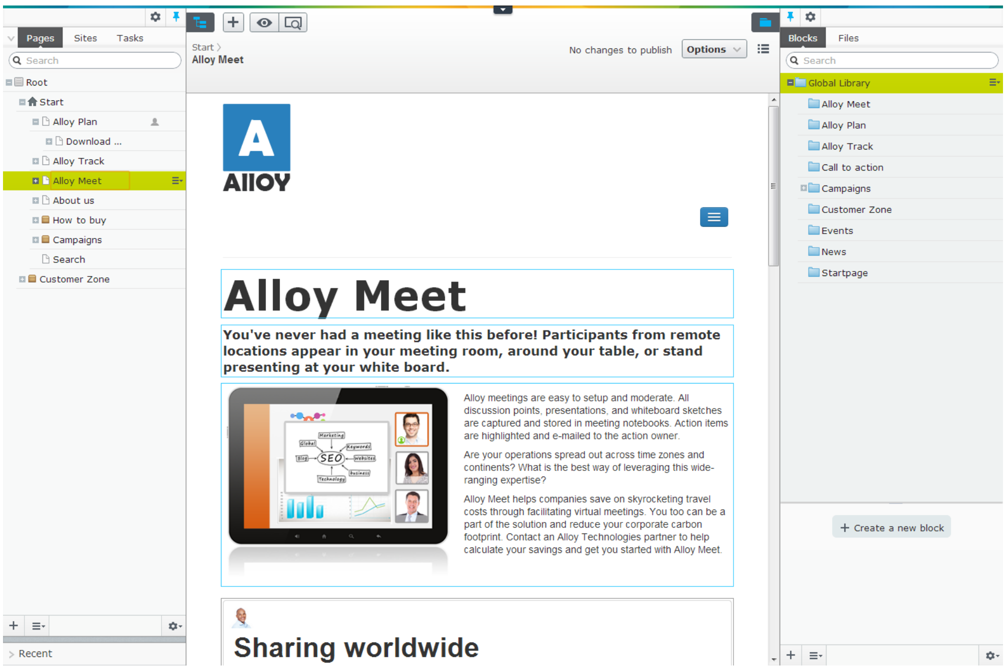
Access EPiServer as follows:

1. Open your web browser and enter the website address (URL) applicable for the specific login procedure, or click the login button if it exists any.
2. In the login window, enter your user name and password and click **Log in**.
3. In the top right corner, click the arrow to expand the welcome menu with available access options.


4. Select either **Go to Edit View** and you will be redirected to the editing view, or **Go to My Dashboard**.
5. When logged in, use the **global menu** at the top to navigate to the different systems integrated with your website.


6. The global menu is automatically minimized, pull it down again by clicking the arrow.


Navigating from the Global Menu



Depending on your access rights, you can access to the following working areas from the **Global Menu**:

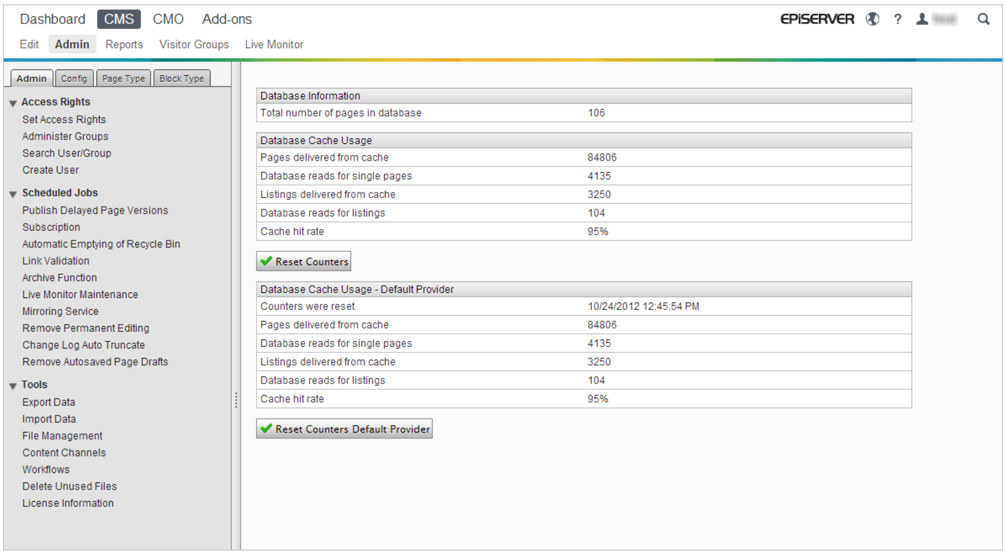
- **Dashboard** is an area where editors and administrators add gadgets for quick access to common tasks or other activities on the website, see the section *EPiServer Platform*.
- **CMS** is the point where you access the following functions for EPiServer CMS:
  - **Edit** is the start point you are redirected to by default after login, where you can edit content for publishing.
  - **Admin** is where you administrate the website.
  - **Reports** is where you can scan your website, for example, search for pages with broken links, see *Report Center*.
  - **Visitor Groups** is where administrators create and modify different target groups for editors to personalize the content on the website, see *Administering Visitor Groups*.
  - **Live Monitor** visualizes the current traffic on an EPiServer CMS-based website.

To the right is a link to **My Settings**, where you can select your personal system settings in EPiServer CMS. Under **?** there is also links to web help, license agreement and to log out from the website.

For information about **Add-ons** and **Search**, see the section *EPiServer Platform*.

Administration Interface

The administration interface introduction page provides an overview of the database information for the website.



Database Information

- **Total number of pages in database** shows the total number of pages stored in the database.

Database Cache Usage

- **Pages delivered from cache** shows the number of pages that was delivered from cache by all providers.
- **Database reads for single pages** shows the number of times single pages was fetched from the database by all providers.
- **Listings delivered from cache** shows the number of times page listings was delivered from cache by all providers.
- **Database reads for listings** shows the number of times page listings was fetched from the database by all providers.
- **Cache hit rate** shows in percent how many pages that was fetched from cache by all providers.

You can also see the latest date and time for reset of the cache counting.

Click **Reset Counters** if you want the counting to start over from zero.

Database Cache Usage – Default Provider

See the description as for **Database Cache Usage**, here applicable to the default provider. Click **Reset Counters Default Provider** if you want the counting to start over from zero.

If you use several providers, they will be listed.

Tabs

The following tabs are shown to the left:

- **Admin**
- **Config**

- **Page Type**
- **Block Type**

The various administration options under each tab that are described in this documentation applies to a standard installation of EPiServer CMS. Note that there might be other options available for a customized site.

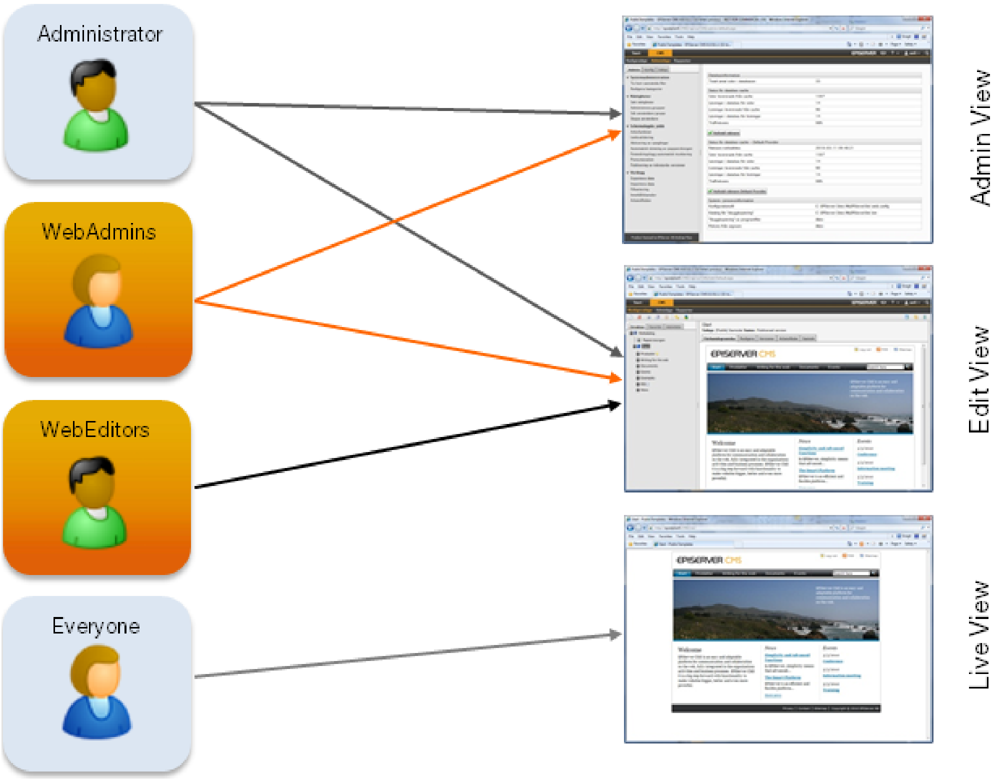
For more information on how to customize, configure and set up EPiServer CMS, see the *Developer Guide in the EPiServer CMS SDK*.

Access Rights

Using access rights in EPiServer CMS you can control which content will be **available** to website visitors, as well as **what** editors can do and **where** on the website. Only content that visitors have access to will be visible, unauthorized content will be hidden. For easier and safer maintenance, it is recommended to base access rights on **user groups** rather than individual users.

EPiServer CMS comes with a set of default access levels and user groups, providing access to the different interfaces view, edit, admin. You can extend this setup with user groups based on your organization and website structure. You can also create visitor groups providing access to specific personalized content.

Providing Access Rights to Different Views



Anonymous external visitors will have access to view mode for reading content through default membership in the **Everyone** group.

Membership in the **Administrators** and **WebAdmins** groups provide access to the admin mode. Members of Administrators, WebAdmins and **WebEditors** will all have access to the editorial interface. All groups normally have access to view mode. Membership in the default group **VisitorGroupAdmins** will provide access to administer visitor groups.

User Groups in a Standard Installation

The default user groups and their functions are described below.

Group	Function
Everyone	Anonymous visitors to the website. All visitors to a public website are anonym-

Group	Function
	ous meaning that they cannot be identified by the system. Also used by Windows.
Administrators	Website super administrators. Administrators have access rights to both edit and admin modes by default. Also used by Windows.
WebEditors	Website editors. Provides access to the edit mode.
WebAdmins	Website administrators. Provides access to the admin mode. By default website administrators will also have access to edit mode.
VisitorGroupAdmins	Administrators of visitor groups. Provides access to the administration of visitor groups. **Note** that membership in this group does **not** provide access to the admin mode.

Note The **WebEditors**, **WebAdmins** and **VisitorGroupAdmins** groups are configured but not automatically available, these must first be created in admin mode before usage. This configuration is normally done when the website is set up.

Related Information

- *Access rights for page types*
- *Access rights for languages*
- *Permission for functions*

Users and User Groups

In EPiServer CMS you can customize which **providers** to use for storing and managing users and user groups in the following ways:

- You can use existing Windows groups, which will be made available in admin mode through the Windows membership and role provider.
- You can manage users and user groups directly from EPiServer CMS, in this case these will be stored in the database.
- You can develop your own customized role and membership provider. You can also combine one or more of these options.

When you select **Administer Groups** in admin mode, all groups will be shown irrespective of the provider that is used on the website. The provider for the group in question is shown to the right of the group name.

Creating Groups in Windows

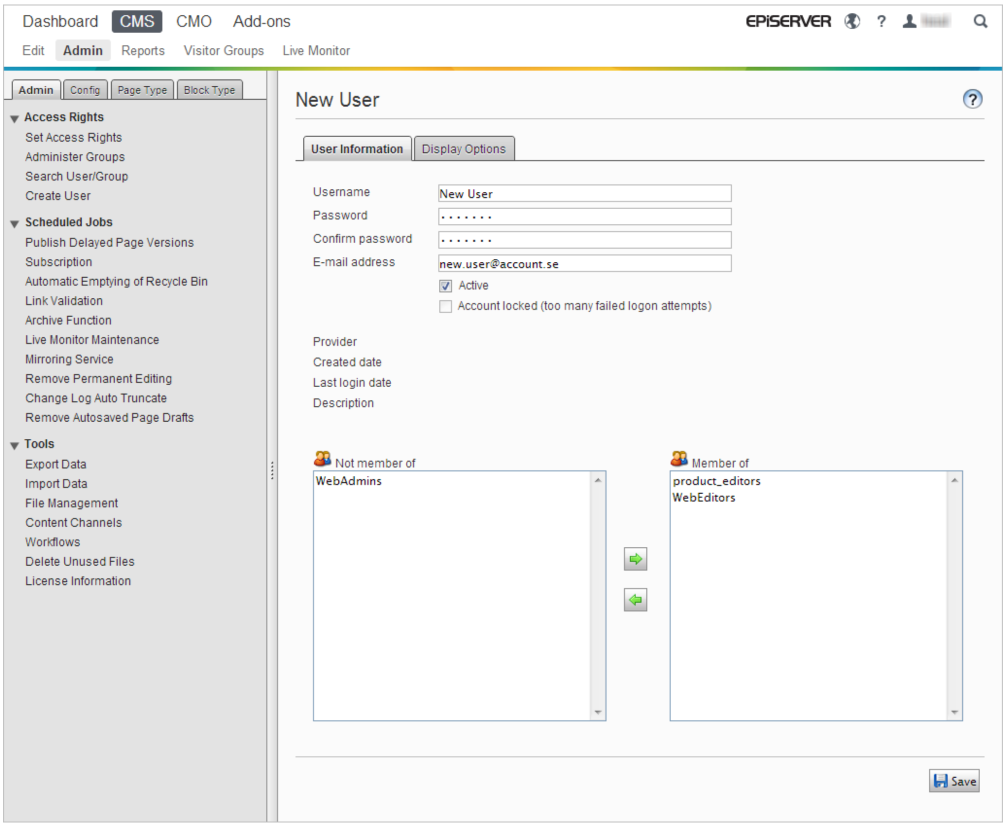
Users and user groups created in Windows can only be managed from Windows. However, when a user logs in to EPiServer CMS for the first time, they will become available in the admin mode so that you can apply access rights from there, and add the user to the proper user groups.

If you create a new group in Windows which you want to use in EPiServer CMS, you must start by logging in with one of the users. Then log in as an administrator and you will find the group in admin mode.

Creating, Editing and Deleting Users

Using **Create User**, you can set up users inEPiServer CMS.

1. On the **Admin** tab, select **Create User**.
2. For the account to work and the user to be able to log in, a user name, password and e-mail address must be specified and it must be specified that the account is active.
3. Select which group or groups they are to belong to.
4. Specify which system language the user should have and which buttons and icons are to be available to the editors in edit mode in the **Display Options** tab. Editors can manage this setting themselves from edit mode.
5. Click **Save**.



Editing Users

To edit a user's details, search for the user under **Search User/Group** and then edit the user. All individuals with access to edit mode can modify a number of their details under **My Settings**. You can edit more information in admin mode, including when the account is to be active, which group the user is a member of, etc.

These properties can only be modified for users that have been created via self-registration or via **Create User**. If you want to edit this type of information when the user is created in another directory service, you must do it with this tool. From admin mode you can change the same information on an external user as the user themselves can do via edit mode.

Edit a user as follows:

1. Select **Search User/Group**.
2. Select the user you want to edit by clicking the username.

3. Make your changes in the form.
4. Click **Save**.

Deleting Users

1. Select **Search User/Group** and search for the user to be deleted.
2. Select the user you want to delete by clicking the user name.
3. Click **Delete**.
4. Confirm the deletion.

Display Options for Users

The **Display Options** tab is for each editor to be able to decide what they want to show in the structure in edit mode. There are two different settings. On the one hand you can choose system languages for the user. EPiServer CMS has several different languages as standard. This means that edit mode and admin mode will be in the language that the user has chosen.

Editors can change these settings themselves under **My Settings**. These settings can also be made when the account is created.

Creating and Deleting Groups

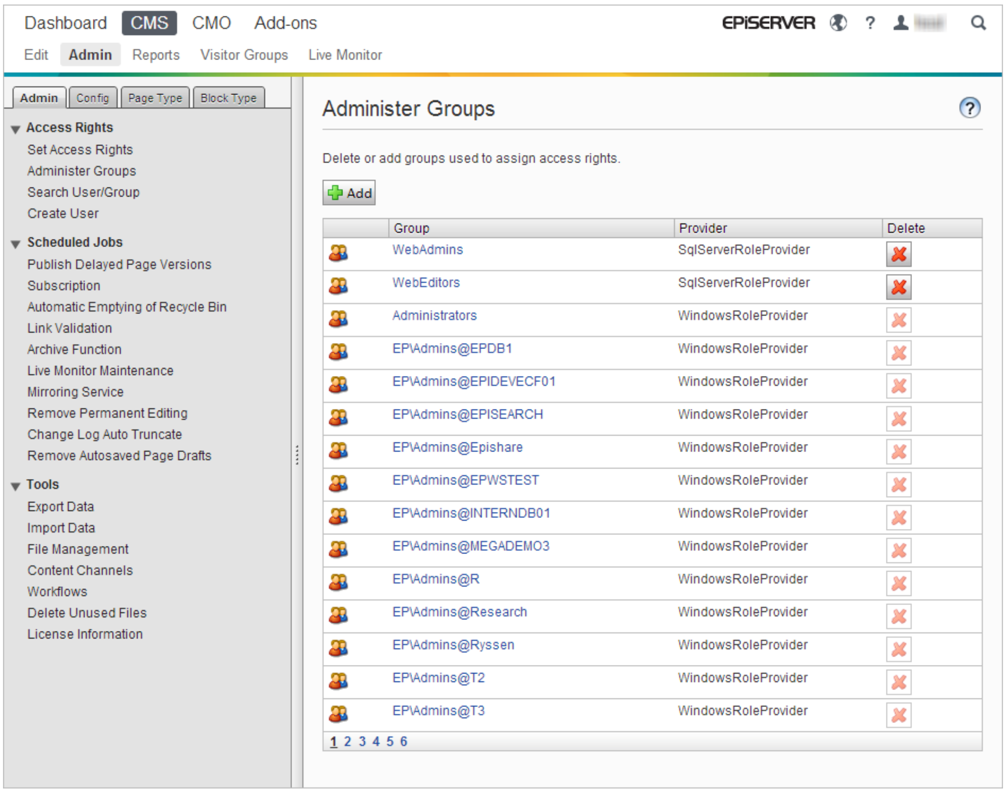
You can create your own user groups and add users as members. Here you also can create the group VisitorGroupAdmins as described in *Providing Access Rights to Different Views*.

Creating a Group

Add a new group as follows:

1. On the **Admin** tab, select **Administer Groups**.
2. Click **Add**.
3. Type the name and description of the group.
4. Click **Save**.

> ***Note*** Users and groups that you create in EPiServer CMS are only available here, they will not be accessible from Windows. Also note that it is not possible to change the name of an existing group. Instead, delete the group and add a new group.



Deleting a Group

Delete a group as follows:

1. On the **Admin** tab, select **Search User/Group** and search for the group you want to delete.
2. Select the group you want to delete by clicking the group name.
3. Click **Delete** to the right of the group name. It is also possible to delete members from a group in this way.
4. Confirm the deletion.

You can also delete a groups by selecting the **Admin** tab > **Administer Groups**, and click the **Delete** button to the right of the group.

> ***Note*** It is only possible to delete groups that have been created in EPiServer CMS.

Setting Access Rights in the Tree Structure

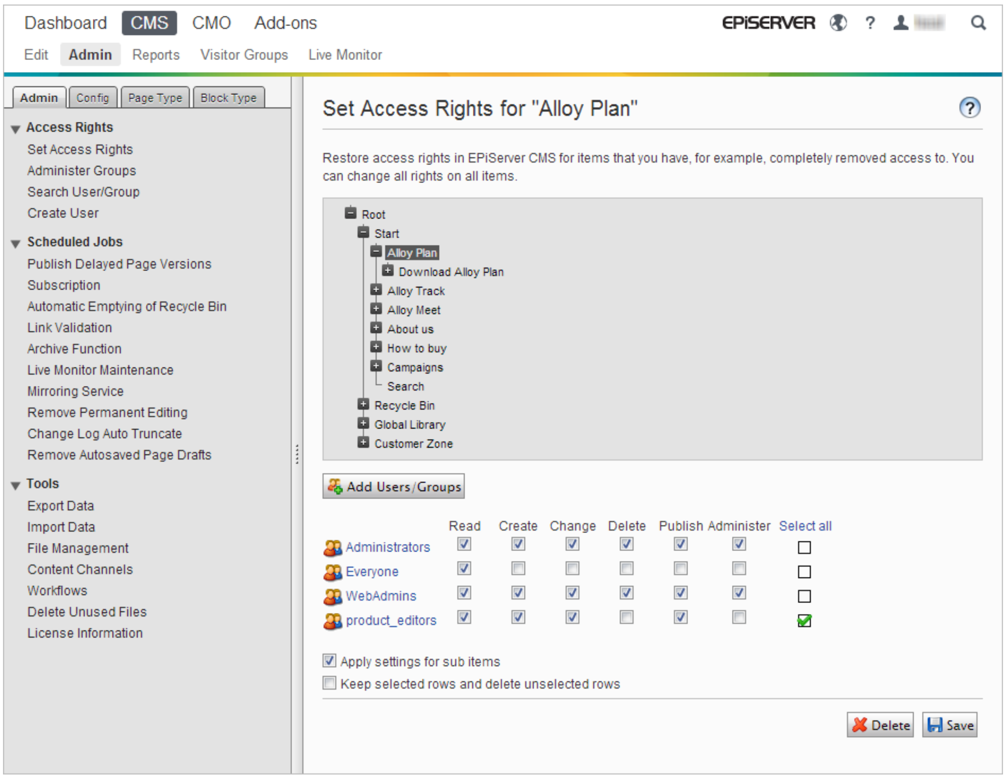
When you have created a group, you define which access rights the group will have in the tree structure. EPiServer CMS have different access levels for what a group or user can do. Each group or user can have different access rights to each page and block, since there is no hierarchy within these levels. This means that a group may have the right to read and publish content but not to create, edit and delete them.

- **Read** means the group/user can read the current content.
- **Create** means the group/user can create content under the current content.
- **Change** means the group/user can edit the current content.
- **Delete** means the group/user can delete the current content.
- **Publish** means the group/user can publish the current content.

- **Administer** means the group/user has the access rights to edit dynamic properties and set access rights and language properties for the current content. **Note** that this level does **not** provide access to the admin mode.

Specify access rights for content with underlying items as follows:

1. On the **Admin** tab, select **Set Access Rights**. The tree structure is displayed in the lower section of the window.
2. Select the page or block in the tree structure for which you want to set access rights. When the content is highlighted, the name of the content is shown with a dark gray background.

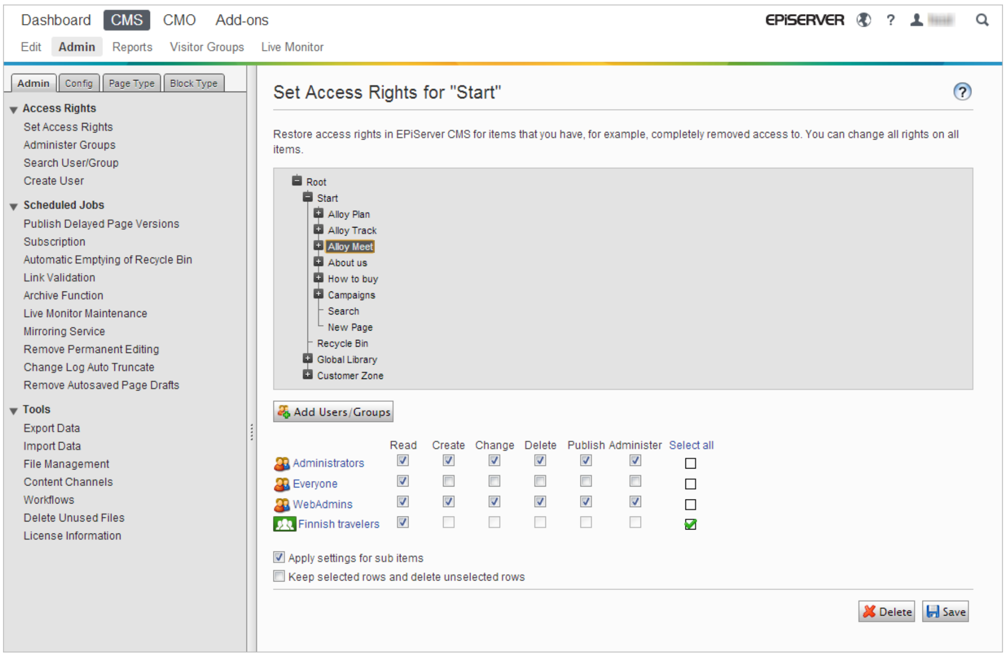


3. Those groups and individuals that have access rights to the highlighted content are shown with the most recently saved access rights above the structure. If you also want other groups or individuals to have these access rights, click **Add Users/Groups** and then select the ones you want. When you add a group or user, no settings will be saved; you are only seeing the information in the window.
4. Specify the level of access rights each group or individual is to have.
5. Save the new access rights by clicking **Save** above the groups. If you want the access rights to apply to the current content and its underlying items, select the **Apply settings for subitems** check box before you save. If you do not select this, you will only save the access rights on the highlighted content.

The rights that you have stored apply to the existing content in the structure that you have saved. New content always inherit the same access rights as the main content.

Remember that you only affect the groups that are highlighted. The groups that are not highlighted when you click **Save** will remain unchanged, irrespective of previous settings. It is therefore important that you do not highlight a group by mistake that you do not want to affect.

Changing and Deleting Access Rights



Do the following to change existing access rights settings for the website structure:

1. On the **Admin** tab, select **Set Access Rights**. The tree structure is displayed in the lower section of the window.
2. Select the page in the tree structure for which you want to edit the access rights. When the page is selected, the name of the page is formatted with a dark gray background.
3. Those groups and users that have access rights to the selected page are shown with the most recently saved access rights above the structure. Clear or select one or several access rights you want to add or delete for the group or user. The entire group is selected when you click one of the check boxes. EPiServer CMS interprets this as that you want to change this group.
4. Save the new access rights by clicking **Save** above the groups. If you want the access rights to apply to the current page and its subpages, select the **Apply settings for subpages** check box before you save. If you do not select this, you will only save the access rights on the selected page.

To set up access rights for visitor groups, follow the instruction as described above, but instead you click **Add Users/Groups** and select **Visitor groups**. Search the visitor group you want to add. You can decide whether you want everyone or only a particular visitor group to access the page. Note that visitor groups will only have read access.

> Remember that you only affect the groups that are selected. The groups that are not selected when you click **Save** will remain unchanged, irrespective of previous settings. It is therefore important that you do not select a group by mistake that you do not want to change.

Updating and Deleting Access Rights in the Page Tree

Update the access rights for existing users or groups, or delete a user or an entire user group as follows:

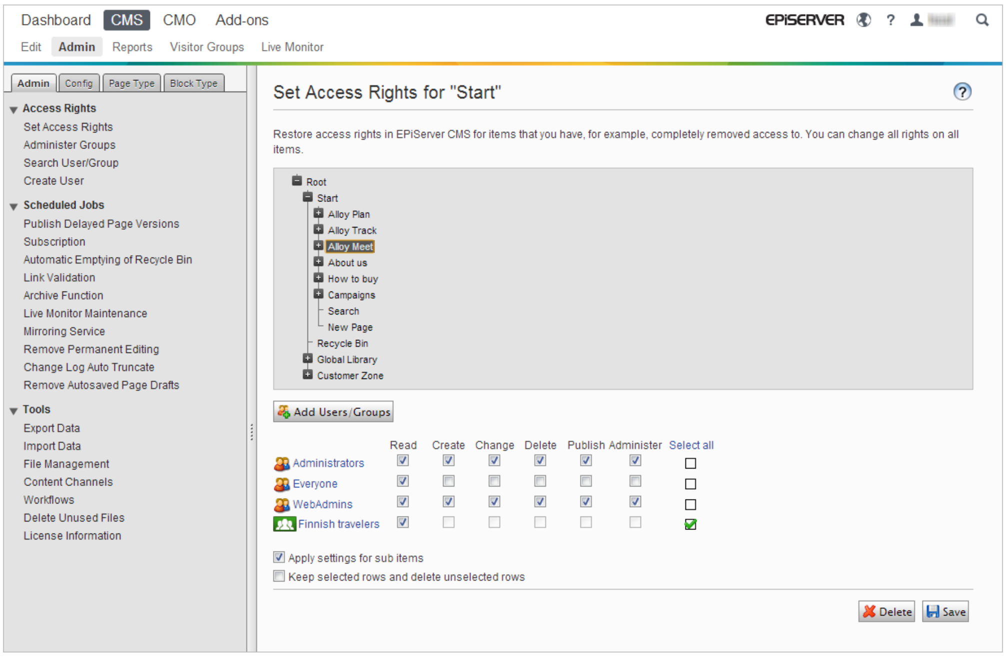
1. Select **Set Access Rights** on the **Admin** tab. The tree structure is displayed in the lower section of the window.
2. Select the page in the tree structure for which you want to remove the group and its access rights. When the page is selected, the name of the page is formatted with a dark gray background.
3. Those groups and individuals that have access rights to the selected page are shown with the most recently saved access rights above the structure. Select one or several groups you want to delete by clearing the check box on the far right.
4. Delete the group by clicking **Delete** above the groups. If you want to delete the groups for the current page and its subpages, select the **Apply settings for subpages** check box before you click **Delete**. If you do not select this, you will only delete the group from the selected page.

> Remember that you only affect the groups that are selected. The groups that are not selected when you click **Delete** will remain unchanged, irrespective of previous settings. It is therefore important that you do not select a group by mistake that you do not want to delete.

Overwriting All Previous Access Rights

Sometimes it is useful to start from the beginning with access rights in a structure. Maybe you have changed the names of your groups and want to delete the old information and start with the new instead. To avoid doing this in two stages, by first deleting all the groups and then adding the new ones, there is an option that allows you to do this in one go.

1. On the **Admin** tab, select **Set Access Rights**. The tree structure is displayed in the lower section of the window.
2. Select the page in the tree structure in which you want to delete groups and add new ones. When the page is selected, the name of the page is formatted with a dark gray background.



3. Those groups and individuals that have access rights to the selected page are shown with the most recently saved access rights above the structure. Select one or several groups you want to keep by selecting them (shown with green check mark).
4. Select the **Add selected rows and delete unselected rows** check box.
5. Select the **Apply settings for subpages** check box if you want to add and delete groups on all subpages. If you do not select this, you will only add/delete it from the selected page.
6. Click **Save**.

The selected groups with their access rights, will be saved on the current page and its subpages if this check box was selected. All the unselected groups will be deleted.

Setting Access Rights for Editor Groups

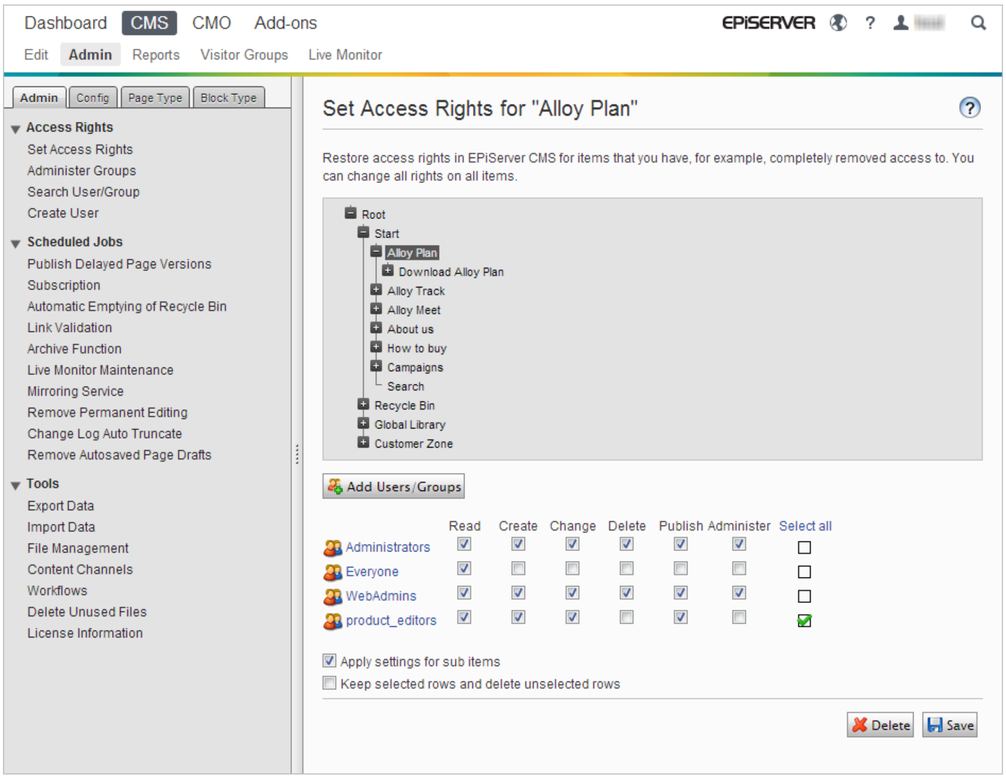
For better control of content creation on large websites, it is recommended to create user groups based on the website structure. For example, a website has three different main branches: Products, News and Support. Each section has two or more editors who will help to update information on the website. These editors will only be able to create and edit pages within their own branch of the tree. We start by creating three groups, either in Windows or EPiServer CMS, depending on the normal procedure.

In this case, the groups are called Products_Editors, News_Editors and Event_Editors. If we have not yet created the users, we must do so now. Then we make sure that the different editors are members of the group where they are to edit. All editors must be members of WebEditors, otherwise they will not be able to access edit mode. This means that all editors must be members of at least two groups: WebEditors and the structure group that specifies what they can edit.

Once the groups and users have been created, set access rights in the correct locations in the structure.

1. On the **Admin** tab, select **Set Access Rights**.

2. Select the page in the structure for which you want to set access rights. In this case, it is the **Products** page.



3. You can now see that no editors have access rights to this page, so start by adding the products_editors group. Click the **Add Users/Groups** button and add your group to the page.
4. Grant the required access rights to the group by selecting the check boxes beside the group. If you double-click a check box, all the check boxes on the left will be selected.
5. Make sure that none of the other groups are selected.
6. Select the **Apply settings for subitems** check box.
7. Click **Save** to save the access rights. The other groups will not be affected. The editor from the products_editors group will only be able to edit the Products page and its subpages on the next login.

Similarly, it is possible to create different groups in order to grant different visitors access to different pages. On a public website, for example, ensure that “Everyone” is not granted access rights to read those pages you do not want to be seen by the general public. By allowing extranet users to log on, they will have access to different pages, depending on the read rights you have set for them. If a visitor does not have the read rights to a particular page, that page will not appear.

Providing Access Rights to Visitor Group Administration

To access **Visitor Groups** in the Global Menu, it is required to be a member of the access groups **CmsAdmins** or **VisitorGroupAdmins**. You can provide access for editors to visitor groups by adding them to VisitorGroupAdmins, otherwise they will be prompted to a login page.

The following example shows how you can provide access for editors in the **EPiServer-Framework.config** file under the virtualRoles section:

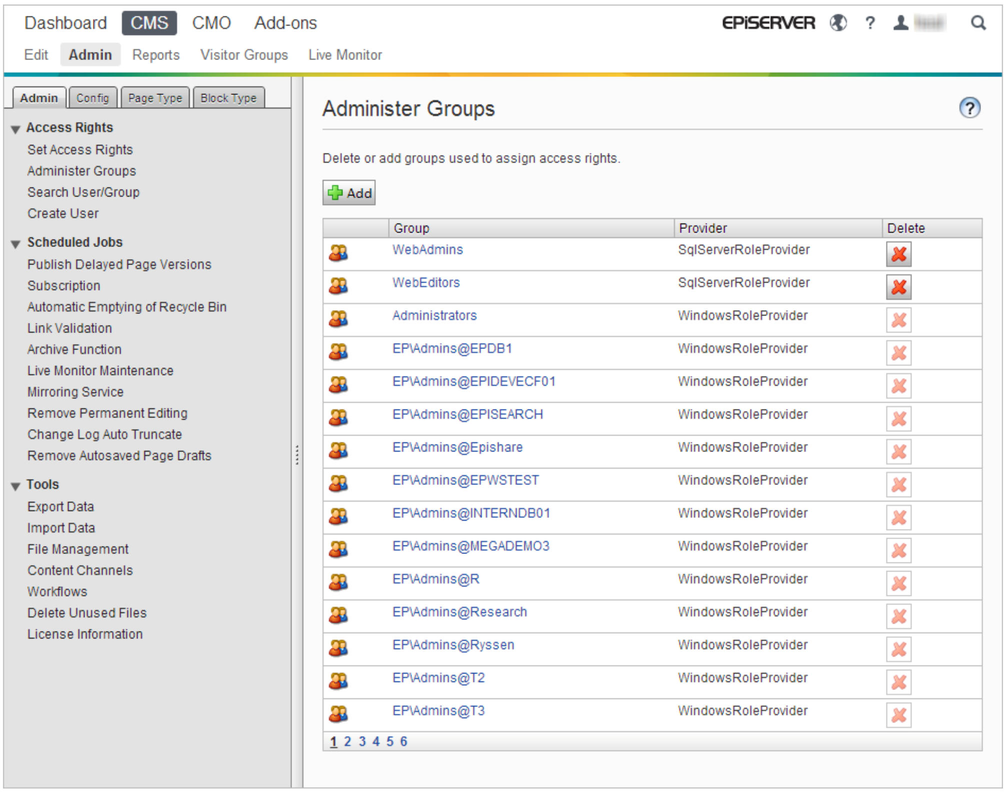
```
<virtualRoles replacePrincipal="true">
  <providers>
    ...
```

```
    <add name="VisitorGroupAdmins" type="EPiServer.Security.MappedRole,
EPiServer" roles="WebEditors" mode="Any" />
  </providers>
```

Searching User/Group

If you wish to check which groups a particular individual is a member of, change settings or maybe give a user a new password, you must find the user's account. This can be done using **Search User-/Group**. Specify the type (group or user) you want to search for; specify search criteria in one or more of the other fields and click **Search**.

The search results are listed and by clicking a group or user name, you can edit the information about that group/user. In the **Number of hits per page field**, enter the number of users that should be displayed on each page. If the search results produce several pages, scroll through the pages in the lower left corner.



Scheduled Jobs

A scheduled job is a service performing a specific task that can be executed repeatedly at a given time interval, or when an administrator starts the job manually. In the standard installation there are a number of different scheduled jobs, and you can also develop customized scheduled jobs for specific tasks on your website.

Scheduled jobs are available under the **Admin** tab > **Scheduled Jobs**.

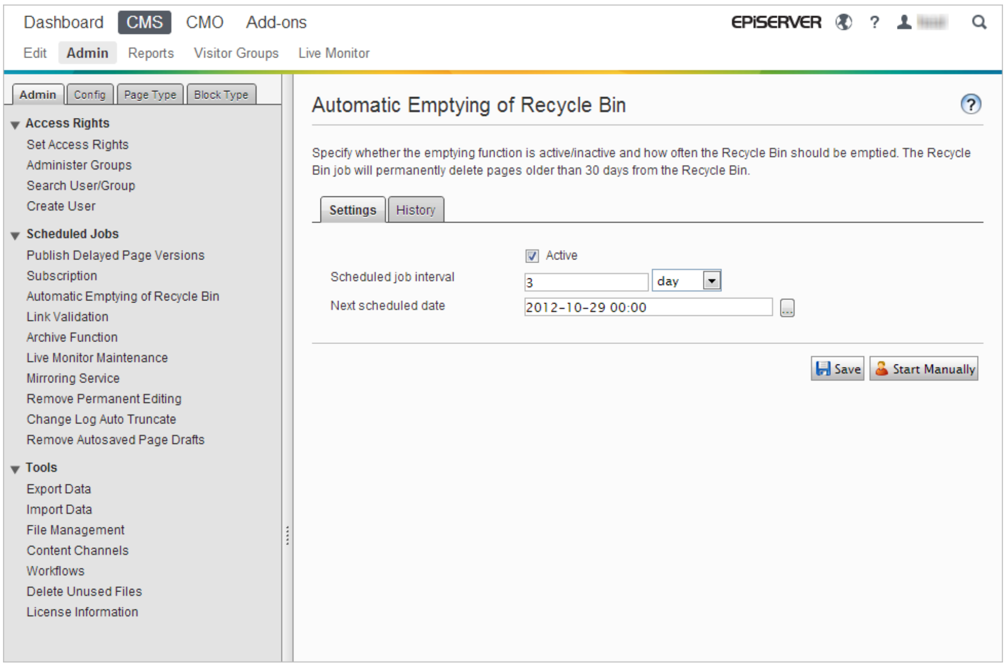
All scheduled jobs has the following tabs:

- **Settings**, where you can make the settings for scheduled job. You have the following options:
  - **Scheduled job interval**. Change the interval for the scheduled job according to the configuration and click **Save**. For example, this will remove page drafts older than 3 days if the default configuration is used.
  - **Next scheduled date**. Change the date for the scheduled job according to the configuration by selecting a date from the calendar and click **Save**.
  - **Start Manually**. You can immediately remove drafts older than 3 days by clicking **Start Manually**.
- **History**, where you can see the log of performed scheduled jobs.

The enabling and configuration of scheduled jobs are done in the configuration files for EPiServer CMS. Refer to the *Developer Guide in the EPiServer CMS SDK* for more information.

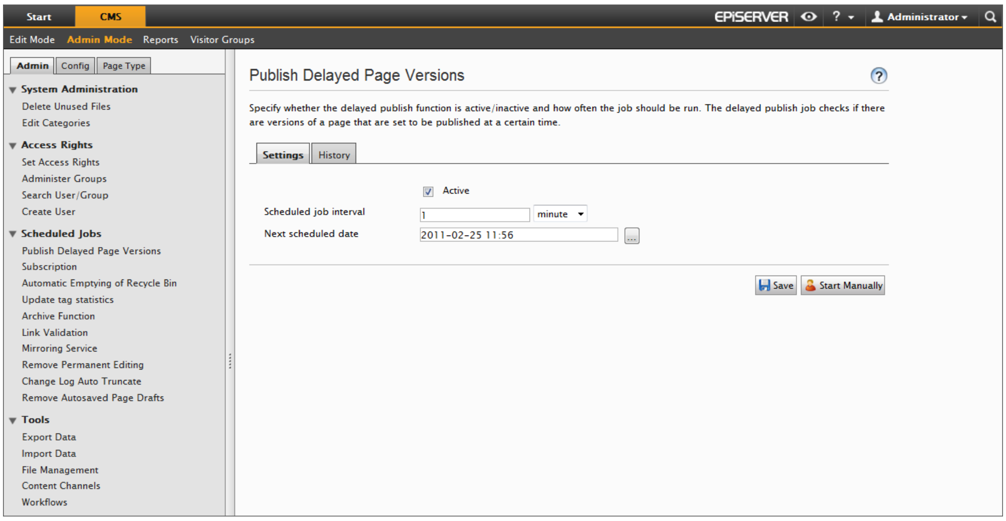
Automatic Emptying of Recycle Bin

With **Automatic Emptying of Recycle Bin**, you can set how often your Recycle Bin should be emptied. The aim of this function is to stop old information from being left in the Recycle Bin for a long period of time. With automatic emptying, all information that is older than 30 days will be deleted from the Recycle Bin. If you disable the automatic emptying function, you must empty the Recycle Bin manually, by clicking **Empty Recycle Bin** from the toolbar in edit mode or by deleting individual pages from the Recycle Bin. When you empty the Recycle Bin manually, all information in the Recycle Bin will be deleted.



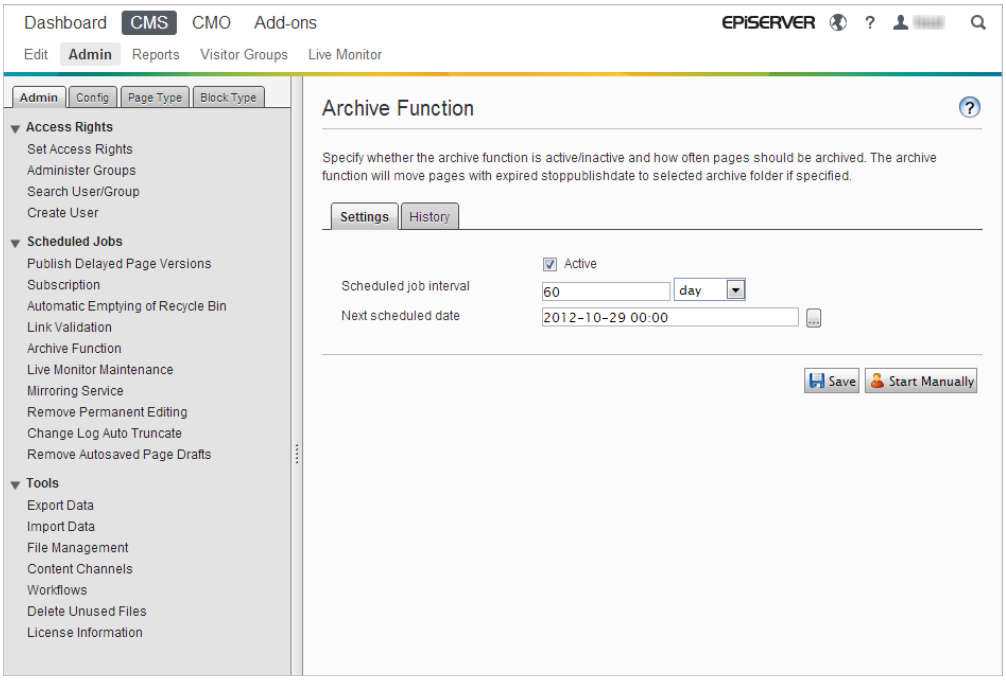
Publish Delayed Page Versions

Using **Publishing Delayed Page Versions**, you can activate and set up how often the system is to check if there are versions of a page for publication at a set time. Delayed publish of a whole page is not controlled by this; it only takes place when an editor has selected Start Publish for a single version of a page.



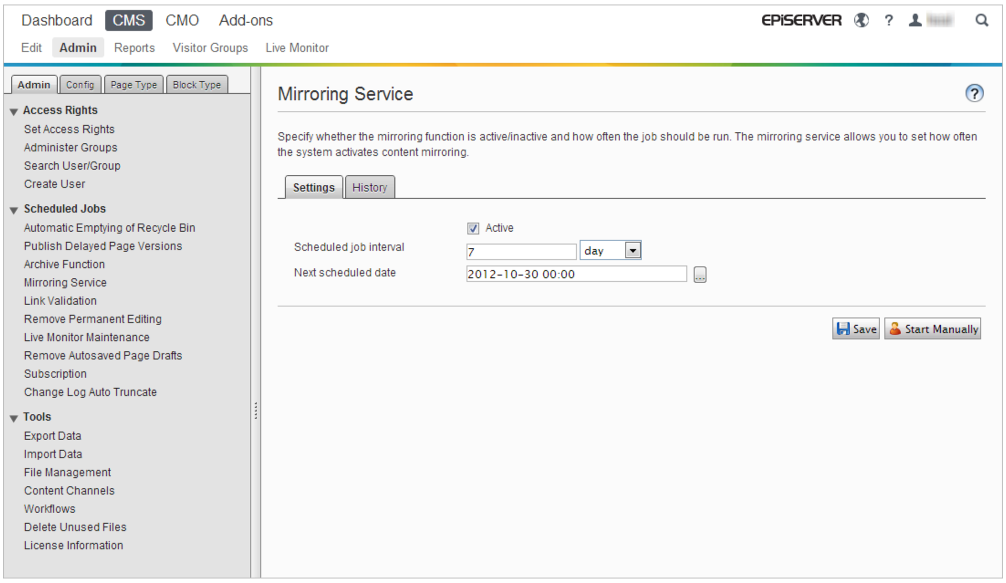
Archive Function

Using **Archive Function**, you can activate and set how often the system is to archive information after the publication period has expired. Note, that there can be a delay between the time when the information stops being published and when it appears in the archive. This may be because archiving only take place once a day. If this is the case, it can take up to 23 hours and 59 minutes before the information appears in the archive, depending on when the page ceased being published.



Mirroring Service

Using **Mirroring Service**, you can set how often the system is to activate the mirroring of contents for other websites. If your website is set up to mirror content from one website to another it can be carried out manually by a single editor or automatically by the system. If you have chosen to let the system mirror the information use the **Mirroring Service** function to set when and how often the system is to activate mirroring.



1. To start the job manually click **Start Manually**.
2. Select the **Active** check box to set up deletion of change log items.
3. Select how often the job should be run and click **Save**.

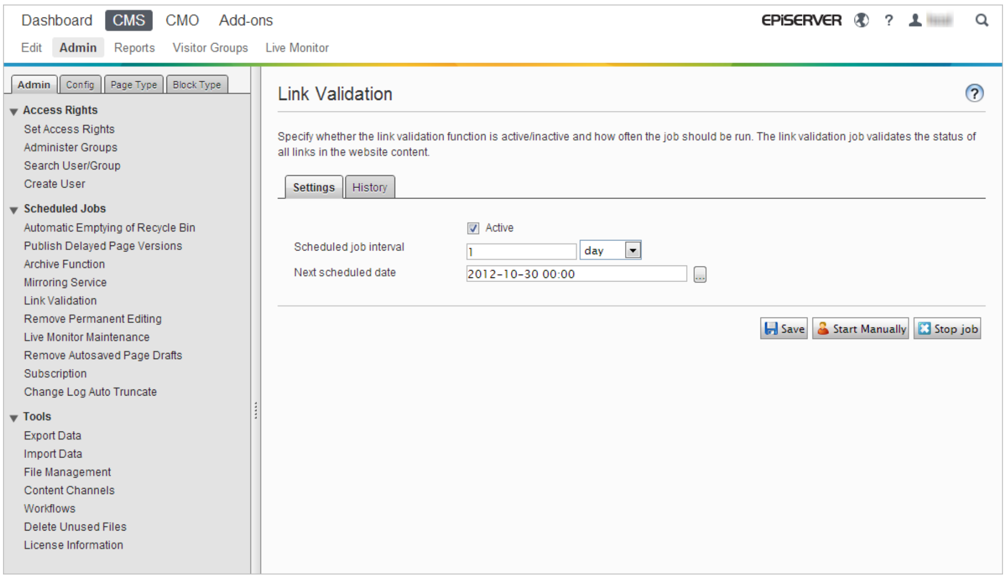
The **History** tab displays the result of previous jobs that have been run. If a job has failed, information will be displayed under **Message** stating why the job failed.

Link Validation

Using **Link Validation**, you can activate a scheduled job which will go through and check all the links on your website to look for broken links. EPiServer CMS will try to contact the target for the link to verify that it is responding.

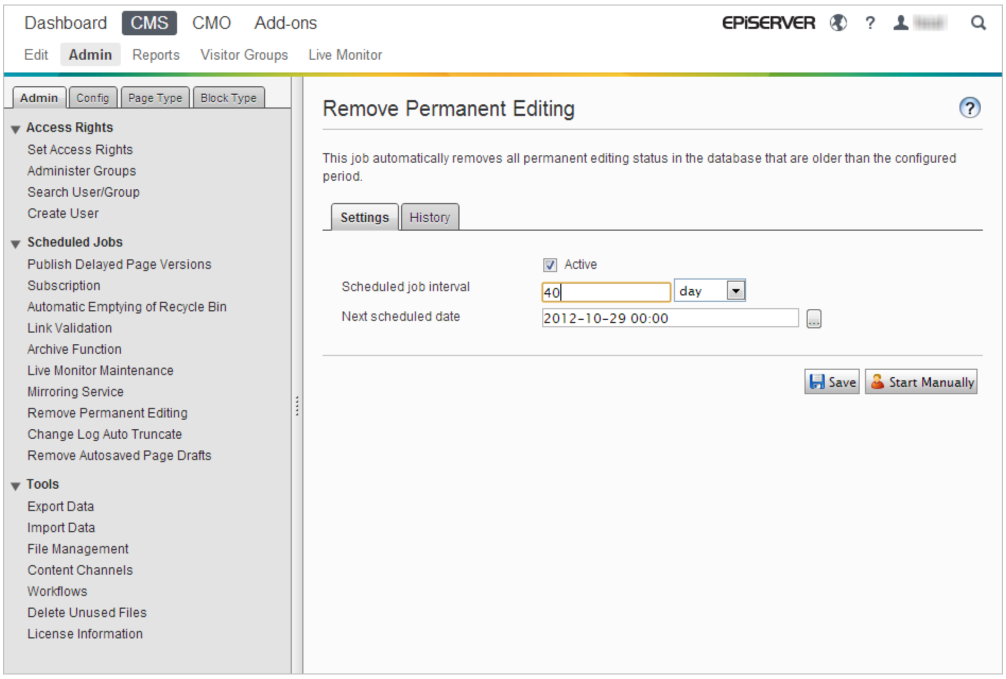
Only links that are unchecked or have been checked earlier than the time when the job started will be returned. The job will continue until no more unchecked links are received from the database. If a large number of consecutive errors are found for external links, in case of a general network problem with the server running the site, the job will stop.

The result of the link validation job is made available as a report called **Link Status**, in the **EPiServer CMS Report Center**.



Remove Permanent Editing

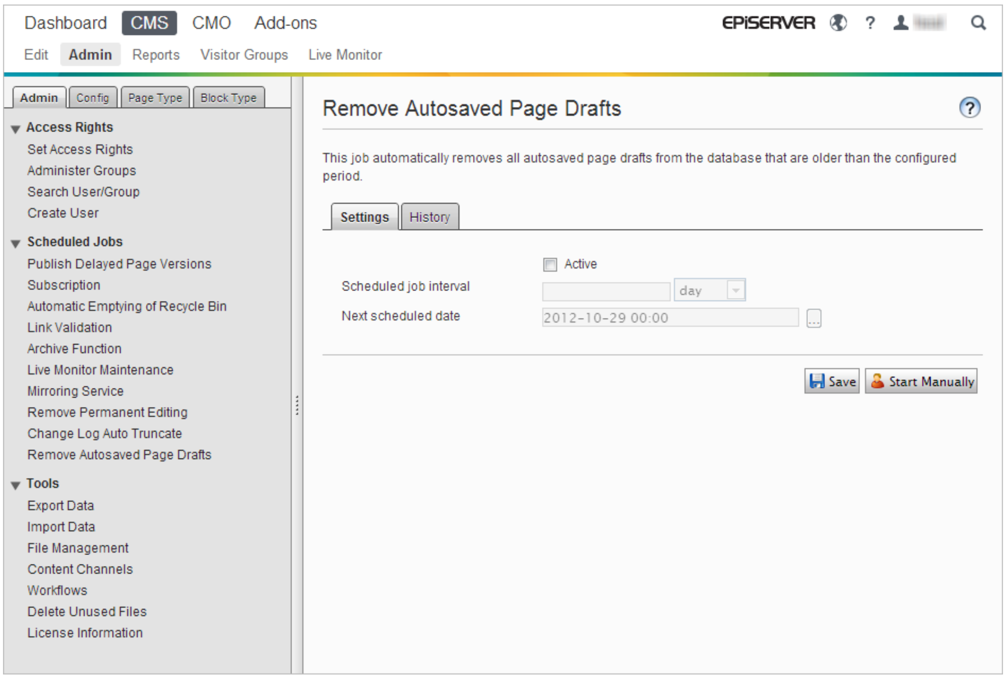
When an editor is working with content in edit mode, the **Permanent Editing** function announces that someone else working on a page to avoid the risk of conflicts. It is enabled by default.



If editors forget to remove the setting, you can set up when you want to run the scheduled jobs or remove the drafts manually in admin mode. In the EPiServer CMS configuration the time interval to remove the setting from the database is set to 30 days by default, which can be changed in the configuration files for EPiServer CMS.

Remove Autosaved Drafts

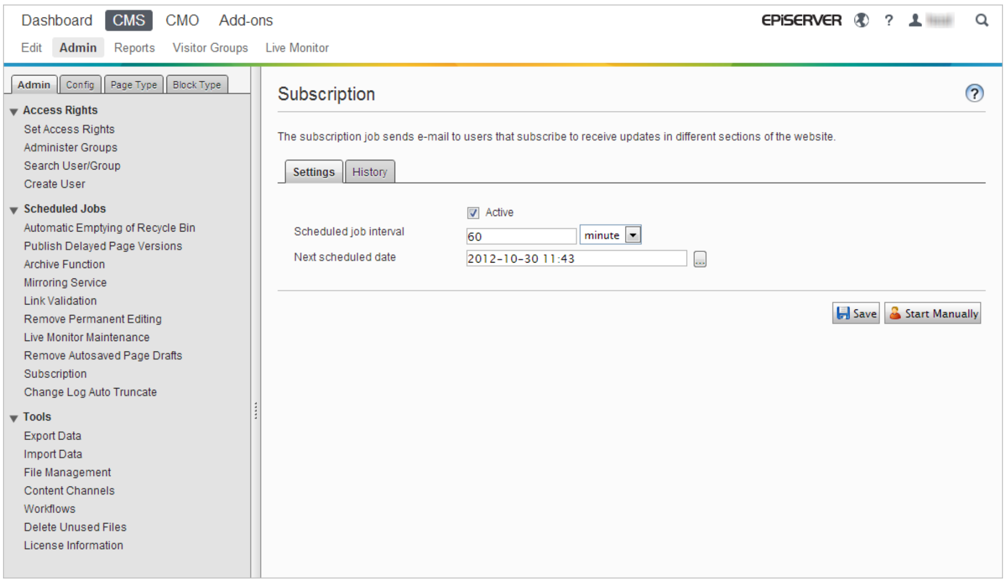
When an editor is working content in edit mode, the **Autosave** function ensures that the work is not going to disappear in case of a sudden crash of the system or browser. It is enabled by default, and any changes will be automatically saved according to the configured time interval.



To prevent the database from being overloaded with page drafts, you can set up when you want to run the scheduled jobs or remove the drafts manually in admin mode. In the EPiServer CMS configuration the time interval to remove the drafts from the database is set to 3 days by default, which can be changed in the **episerver.config** file.

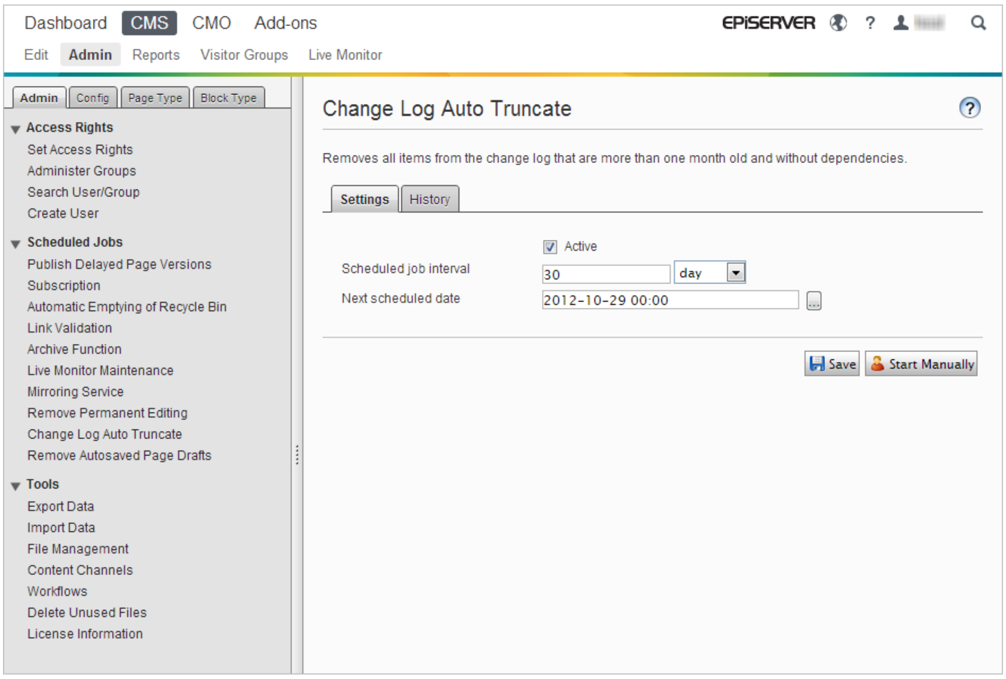
Subscription

With **Subscription**, you can activate and set up how often the system is to send out e-mail messages to all visitors who have signed up for subscription. Each visitor selects to time interval to receive e-mail messages from the subscription function. You decide here how often the system is to check for new and updated pages to distribute.



Change Log Auto Truncate

The Change Log Auto Truncate scheduled job deletes items from the change log that are over one month old and do not have any dependencies registered against them by another part of EPiServer CMS (e.g. Mirroring).



1. To start the job manually click **Start Manually**.
2. Select the **Active** check box to set up deletion of change log items.
3. Select how often the job should be run and click **Save**.

The **History** tab displays the result of previous jobs that have been run. If a job has failed, information will be displayed under **Message** stating why the job failed.

Exporting and Importing Data

It is possible to export and import data between one EPiServer CMS and another. This function is widely used by developers who build new functionality in a test/development environment. When work is complete and the information is to be put into operation in the live environment, it is useful to be able to export from the test environment and import into the live environment.

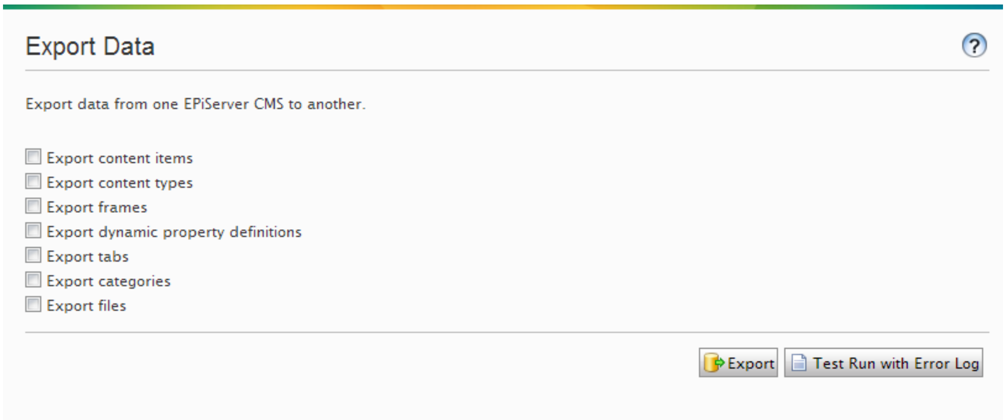
Export Data

The **Export Data** tool is used to export data from the database and/or files to a file that can be imported into another website. This function can be used to transfer information from one EPiServer CMS website to another.

You can export the following:

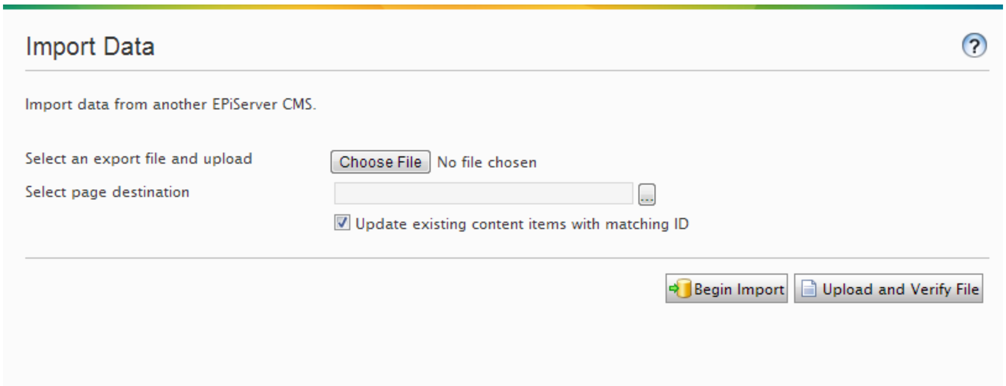
- Pages with (if you so choose) associated page types
- Page types
- Frames
- Dynamic property definitions
- Tabs
- Categories
- Files
- Visitor groups

When you select to export page types, for example, you will see a list of all accessible page types, from which you can select those you want to export. When you have made your selection, click **Export** and indicate where the files are to be saved.



Import Data

With the **Import Data** function, you can retrieve information that was previously exported from another EPiServer CMS website. Start by indicating the files you want to import. Files must end with .episerverdata in order for the import to function. The files are read and checked. Information on their content is displayed in a list, and you can check that these are the correct parts to import. You must also specify any settings for your new pages, etc. Complete the procedure be clicking **Begin Import**.



If you select the **Update existing pages with matching ID** check box is selected then the import will keep the same GUID-based identities for items (for example, pages, blocks and files) that they had on the exporting site. During import a check whether an item already exist is performed and in case that is true that item is updated (given that the imported item had a changed date that is later than existing item). In previous versions of EPiServer CMS during import all items got new GUID-based identities which caused that for each item in the package a new item was created on the importing site.

As an example say that you have an import package with one page. If you import that package several times in previous EPiServer CMS versions (or having the check box unselected), then you get a new page for each import. If you run several imports with the check box selected then you will still only have one page.

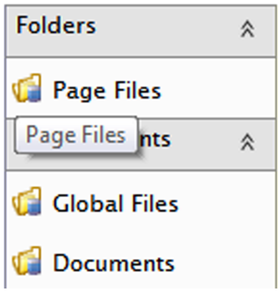
File Management

EPiServer CMS has full support for file management on the server via the browser. From the File Manager, the editor can create folders, upload files and manage the files by copying, moving, deleting, etc. Access rights can also be set for different folders for ease of use.

Version management of the files uploaded to the server are also supported, and you can track changes the files. It is also possible to check out a file to lock it for editing. For more information about how to manage files, see *EPiServer CMS User Guide*.

File management in admin mode has the same functionality as in edit mode, but with more extensive access rights. Configuration of the file manager is done in the configuration files for EPiServer CMS as described in the *Developer Guide in the EPiServer CMS SDK*.

Starting Points in File Manager



When you configure EPiServer CMS, you define the starting points that will be available in the File Manager. A starting point points to a specific physical place for storing of files, which does not have to be on the web server. It is always the same starting point displayed in the link tool when the editor chooses to insert images or documents. The most frequently used folder is usually selected as default folder in the link tool. The image displays the default starting points - **Page Files**, **Global Files** and **Documents**.

Configuring Starting Points

The technology used for managing folders in EPiServer is a standard technology from Microsoft, called Virtual Path Provider. In a standard installation of EPiServer CMS, two starting points and the page files are configured. During installation a VPP directory is specified and this is the physical place in which the standard folders will be saved.

You can customize and add new starting points to the File Manager, this is done in the configuration files for the website. Refer to the *Developer Guide in the EPiServer CMS SDK* for more information.

Global Files versus Page Files

There are two different methods when storing files. With **Page Files**, files are stored in a folder that is accessible only from a specific page. Using **Global Files**, files are stored in a folder structure that will be accessible from all pages on the site. Both methods can be used in parallel, depending on the scenario and type of content you are creating.

The features described here can be customized in the configuration files for EPiServer CMS as described in the *Developer Guide in the EPiServer CMS SDK*.

Page Files

When an editor uploads a file to **Page Files**, a new folder is created that is linked to that particular page. The page folder is called Page Files in a standard installation. One advantage of using page files is that editors do not need to keep track of where to put their images. Another is that you can use the **Delete unused files** function from admin mode. This function deletes files in folders linked to pages that are no longer on the website. If you use page files, the access rights for the page will be mirrored in the folder structure.

Global Files

Global Files is a folder structure shared by editors on the site. When an editor uploads a file here, an appropriate folder location must be selected before the file is uploaded. It is also possible to give editors access rights to create their own folders in the structure. One advantage of using the global files is that editors can easily locate and reuse files on the web server. With this method here is no automatic clearing of folders, file maintenance must be done manually. However, if you delete a file that is used by another page in the system, you will receive a warning message.

Setting Access Rights for Folders

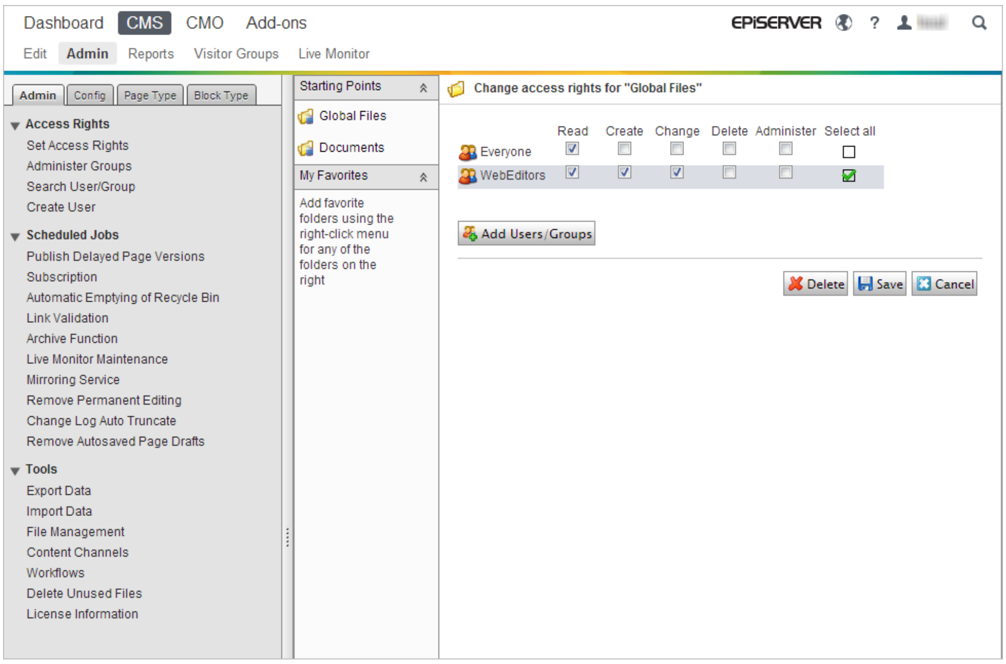
These are the different levels of access that you can apply to a folder:

- **Read** means the group/user can read in the folder, including linking to information in the folder.
- **Create** means the group/user can create folders and upload files to the folder.
- **Change** means that the group/user can edit the content and metadata of the files in the folder.
- **Delete** means the group/user can delete information from the folder.
- **Administer** means that the group/user can set access rights to folders from edit mode. **Note** that this level does **not** provide access to the admin mode.

The **Everyone** group must always have read access to folders and files that should be publicly available on the site (accessible to anonymous visitors).

Set access rights to folders as follows:

1. On the **Admin** tab, select **File Management**.
2. Open the folder that you wish to set rights to by double-clicking the folder.



3. Click the **Change Access Rights** tool. (You can also open this tool by right-clicking directly on the folder, steps 2 and 3 in one.)

4. The groups that have access rights in the folder are now displayed. The **Inherit permissions from parent** check box is usually selected, remove this by clearing it.
5. To add more groups or users click **Add Users/Groups**.
6. Specify the level of access rights each group or individual is to have.
7. Click **Save**, above the groups.

All underlying folders automatically inherit the same rights as a main folder if this is not changed manually. If the editor creates new folders, these will also inherit the same rights.

If the **Change Access Rights** button is not active, it means that in most cases the File Manager is not correctly configured. This can also be because you do not have the authorization required to change access rights in the folders.

Deleting Unused Files

This feature automatically deletes files stored in Page Files folders for pages that have been deleted from the website. Selecting **Delete Unused Files** removes all the folders where **Page files** are used. For the files to be deleted from the web server, the page must be deleted and the Recycle Bin emptied. It takes a further 30 days after the Recycle Bin is emptied, before you can delete unused files.

Content Channels

Content is retrieved from external systems through channels on the website that define which content should be retrieved, where it should be placed and how it should be displayed. Each channel consists of a number of settings that define the pages, page types and properties to be retrieved. These settings are defined in admin mode.

Create a content channel in admin mode as follows:

1. Select **Content Channels** on the **Admin** tab.
2. Click **Add**.
3. Enter a name for the channel in the **Channel name** field. **Note** The name entered in this field is important and is also used when configuring the external system.
4. In the **Page root** field, select where in the tree structure that you want the content from the external system to be displayed.
5. In the **Virtual root** for files field, enter the path in the File Manager where you want any files from the external system to be stored, for example, ~/Global Files/SharePoint Files.
6. The Save action field defines the status that the pages will receive when they are transported to EPiServer CMS.
   None - Set the save action to None if you do not want any pages to be retrieved from the external system. This can be seen as a way of switching the channel off.
   Save - The pages will be imported so that they have status “Not ready”.
   Check In - The pages will be imported so that they have status “Ready to publish”.
   Publish - The pages will be imported and published.
7. In the **Default page type** field, state which page type you want to be used as default when retrieving content from the external system.
8. Map the page type properties according to the instructions below and click **Add**.

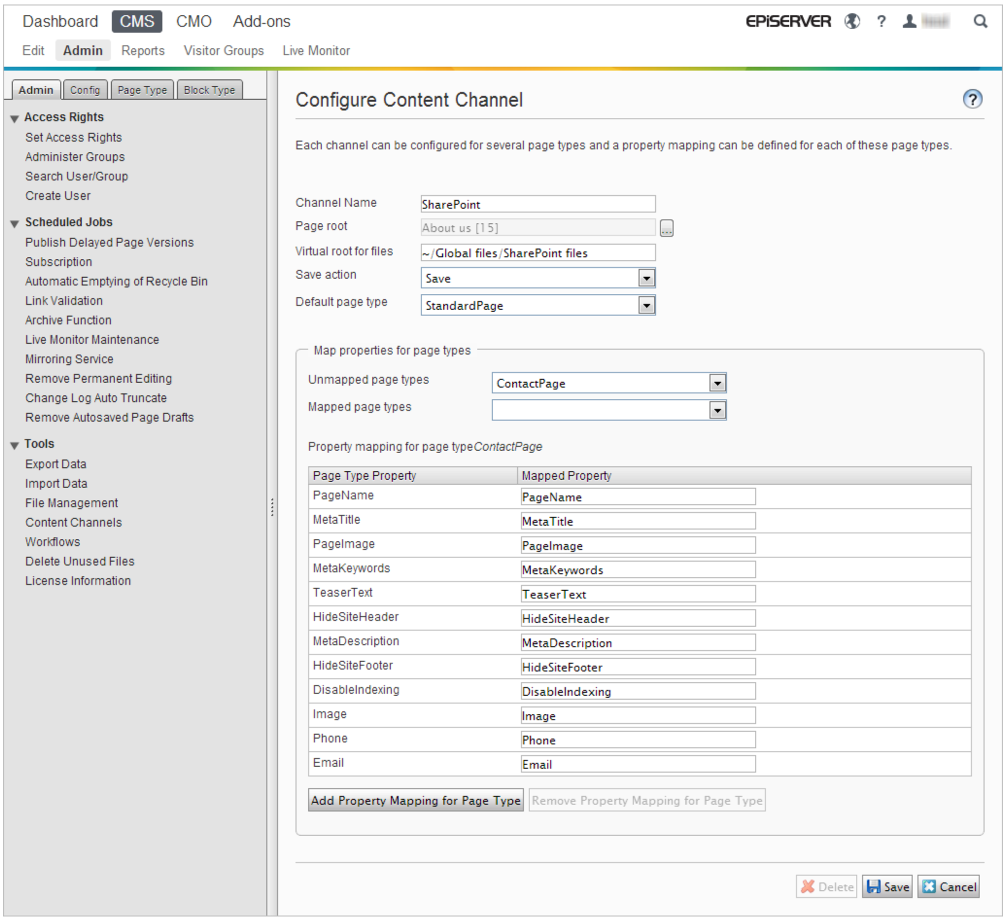
Mapping Page Type Properties

All page type properties in EPiServer CMS have a corresponding property in the external system. It is necessary to map these properties so that EPiServer CMS knows which content should be transported to which property in the page types.

To map the properties for a page type, select the unmapped page type from the Unmapped page types drop-down list. Change the property names in the Mapped Property column so that they correspond to the properties in the external system and click **Add Property Mapping for Page Type**. The page type with the mapped properties will now appear in the Mapped page types drop-down list.

To change the properties for a mapped page type, select the page type from the Mapped page type drop-down list, change the properties and click **Update Property Mapping for Page Type**.

To remove the mapped properties for a certain page type, select the page type from the Mapped page type drop-down list, change the properties and click **Remove Property Mapping for Page Type**.


Dashboard CMS CMO Add-ons
EPiSERVER
Edit Admin Reports Visitor Groups Live Monitor
Admin Config Page Type Block Type
Access Rights
Set Access Rights
Administer Groups
Search User/Group
Create User
Scheduled Jobs
Publish Delayed Page Versions
Subscription
Automatic Emptying of Recycle Bin
Link Validation
Archive Function
Live Monitor Maintenance
Mirroring Service
Remove Permanent Editing
Change Log Auto Truncate
Remove Autosaved Page Drafts
Tools
Export Data
Import Data
File Management
Content Channels
Workflows
Delete Unused Files
License Information
Configure Content Channel
Each channel can be configured for several page types and a property mapping can be defined for each of these page types.
Channel Name SharePoint
Page root About us [15]
Virtual root for files ~/Global files/SharePoint files
Save action Save
Default page type StandardPage
Map properties for page types
Unmapped page types ContactPage
Mapped page types
Property mapping for page type ContactPage
Page Type Property Mapped Property
PageName PageName
MetaTitle MetaTitle
PageImage PageImage
MetaKeywords MetaKeywords
TeaserText TeaserText
HideSiteHeader HideSiteHeader
MetaDescription MetaDescription
HideSiteFooter HideSiteFooter
DisableIndexing DisableIndexing
Image Image
Phone Phone
Email Email
Add Property Mapping for Page Type
Remove Property Mapping for Page Type
Delete Save Cancel

Workflows

Workflows can for instance be used for content publishing and translation task management in large organizations. Workflows in EPiServer CMS are built on standard Microsoft Windows Workflow Foundation, providing the opportunity to create all types of workflows. A developer must carry out the technical adaptation of the workflows before administrators can manage them from the admin mode. The developer creates the functionality to assign tasks, send e-mails, create information or similar. The administrator manages the triggering events, the users involved in the workflow, and other settings.

The basis of a workflow is the code that defines actions and events, the Workflow Foundation files. The workflow code base is flexible and can be reused for different scenarios. Sometimes a workflow should start manually, another time automatically. In this case, you create different **definitions** from admin mode based on the same workflow. The definition contains a number of different parameters for triggering and facilitation of the workflow. When a definition is started, an **instance** is created. A definition can have several hundred instances underway at the same time and this is often what you see as the actual workflow.

In the following the workflows in a standard installation of EPiServer CMS are described.

Sequential approval workflow

The sequential approval workflow involves one or more people/groups receiving a task to approve an event in a sequential order. If a person in the workflow does not approve the task, information about this will be sent to the person who created the event. The task will not be sent on to the next person in the workflow.

Parallel approval of pages

The workflow for approval in several parallel steps involves multiple people/groups receiving a task at the same time for approval. If one of the individuals approves or does not approve the event, the task will be removed from the others. This can be used in a discussion forum in which we want to moderate entries.

Translation product pages

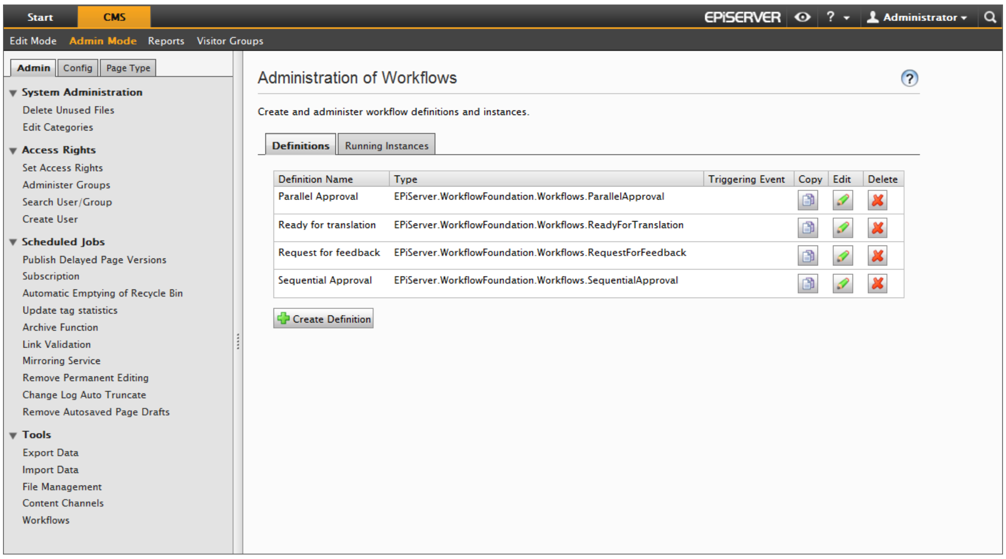
The translation workflow requires activation of globalization in EPiServer CMS. When a first language version of some content is created, the workflow initiates the translation process by alerting content translators. If the content has not been translated after a certain time, reminders and notifications will be sent.

Request for feedback

The request for feedback workflow allows an editor/group to ask for feedback on content. The individual who starts the workflow selects the content to provide feedback for, and a task is sent to a selected person or group. Note that those providing feedback must have reading access to the content, even if it has not been published.

Administration of Workflows

Select **Workflows** in Admin mode to open the Administration of workflows window. A list of all the definitions appears and from here you can create new, copy, change and delete definitions.



You have the following tabs:

- **Definitions** contains all the definitions that have been created. In a definition, you enter what will trigger an instance, which people should be involved, which places it should apply to, etc. It is fully possible to have several definitions that build on the same technical workflow.
- **Running instances** Every definition is triggered by a certain event or a manual start. You can see all the instances that are now running on the Running instances tab.

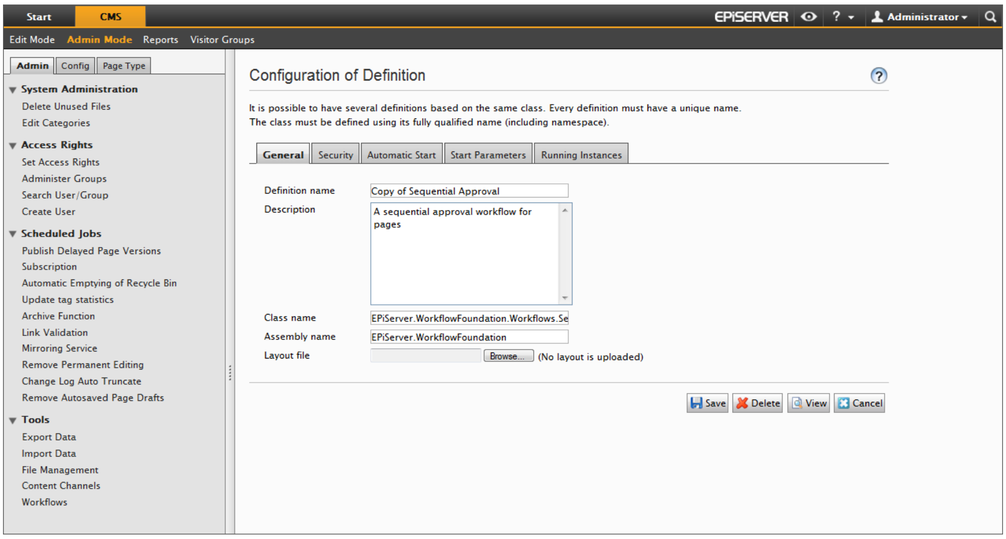
Creating Workflows

To create a workflow from Admin mode, the workflow definitions must be configured and made available there. You can use one of the existing workflows included as standard, or copy one of these to create a new workflow.

1. Select **Workflows** on the **Admin** tab in Admin mode. Existing workflows on the website are listed on the right side of the page.
2. To configure a new workflow click **Create definition**, or click **Copy workflow** to copy an existing workflow. The form for the settings for the workflow appears.
3. When you create a new workflow, three tabs appear. When you have selected which workflow will manage the technology behind the workflow and saved it, more tabs will appear.
4. Enter your settings for the various tabs and click **Save** at the top, above the tabs.

General Tab

On the **General** tab, specify general information about the workflow and which technology should be used. In order to be able to create a new definition, you will need information from the developer.



Definition name

Specify the name of the workflow. If the workflow is to be started manually, the name should be as descriptive as possible so that the editor can differentiate between the workflows.

Description

A brief description of the workflow; this text will be displayed to the editor when he/she is to activate the workflow.

Class name

Specify the class name that the workflow has in the code. The developer of the workflow must provide this information. For the four workflows in a standard installation of EPiServer CMS, the class name is as follows for the different flows:

Workflow	Class name
Sequential approval workflow	EPiServer.WorkflowFoundation.Workflows.SequentialApproval
Parallel approval of pages	EPiServer.WorkflowFoundation.Workflows.ParallelApproval
Translation product pages	EPiServer.WorkflowFoundation.Workflows.ReadyForTranslation
Request for feedback	EPiServer.WorkflowFoundation.Workflows.RequestForFeedback

Assembly name

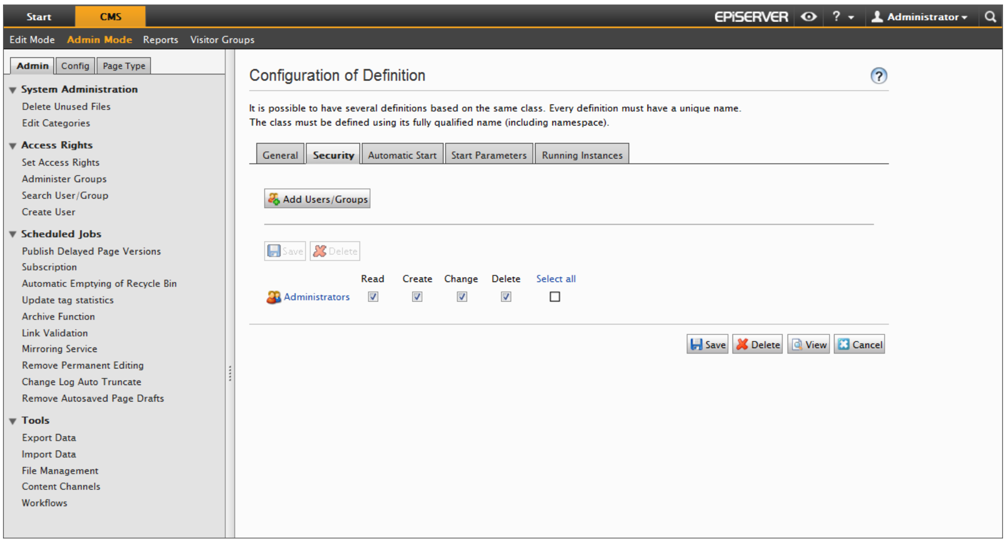
Specify the assembly name for this workflow. The developer of the workflow must provide this information. In the four workflows available in a standard installation of EPiServer CMS, the Assembly name is always EPiServer.WorkflowFoundation.

Layout file

A layout file is automatically created when you develop the workflow and gives a schematic picture of the different events in the workflow. It is possible to upload your own such picture if you wish.

Security Tab

All the workflows can be started manually from Edit mode if you have authorization to do this. On the **Security** tab you can specify which groups and people should have authorization to read, change, delete and start the current workflow directly from Edit mode.

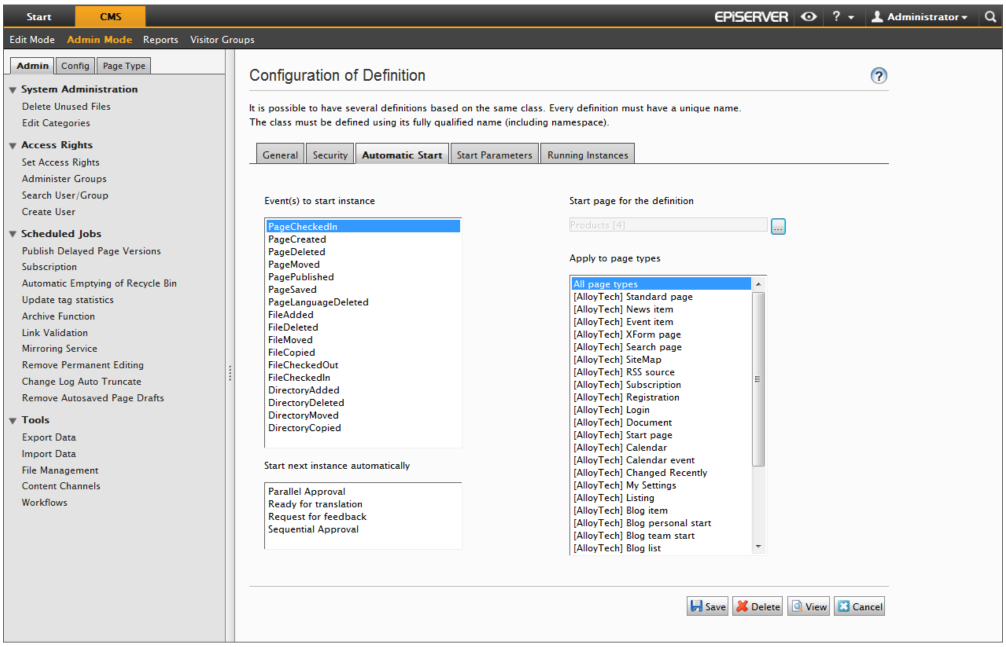


To give different people or groups authorization, you have to add them with the **Add Users/Groups** buttons. By selecting the different check boxes you can give different people/groups different authorization.

Authorization	What it means
Read	The group/person can see running instances in the current workflow from Edit mode.
Create	The group/person can start an instance in the current workflow from Edit mode.
Edit	The group/person can change the settings of an instance in the current workflow from Edit mode. This is of course provided that you have also selected the check boxes for certain workflows for this under the Start Parameters tab.
Delete	The group/person can delete an instance that has started in the current workflow.

Automatic Start Tab

On the Automatic start tab you specify which event in EPiServer should trigger the instance to start. You can also choose to start an instance built on another workflow directly after this instance has finished. Depending on which event starts the instance, you will also have the option of selecting a place in the structure and the page type for which it will apply.



Events that will start an instance

All selectable events are events in EPiServer CMS. This involves either pages or files and folders in the File Manager.

Event	Involves
PageCheckedIn	A page is checked in by the editor selecting the Ready to publish button.
PageCreated	A page is created.
PageDeleted	A page is deleted.
PageMoved	A page is moved in the tree structure.
PagePublished	A page is published.
PageSaved	A page is saved.
PageLanguageDeleted	A language version of a page is deleted.
FileAdded	A file is uploaded to the File Manager.
FileDeleted	A file is deleted from the File Manager.
FileMoved	A file is moved.
FileCopied	A file is copied.
FileCheckedOut	A file is checked out.
FileCheckedIn	A file is checked in.
DirectoryAdded	A folder is created in the File Manager.
DirectoryDeleted	A folder is deleted from the File Manager.
DirectoryMoved	A folder is moved.
DirectoryCopied	A folder is copied.

Start next instance

All the definitions created are displayed in the list under Start next instance automatically. By selecting another definition, it will start automatically after the one you are creating right now.

Place in the structure

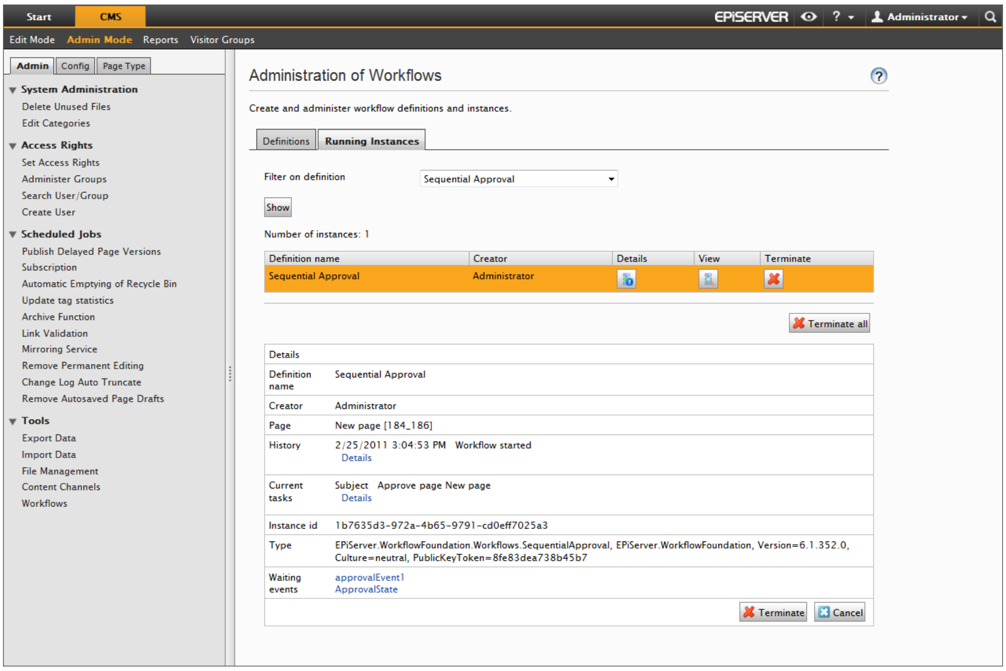
If you have selected a page-related event, you can choose where in the tree structure it will apply. You do not have to choose a place, but if you do not, the event will be triggered by the event you have chosen in the whole structure.

Page type for which the definition will apply

Sometimes you have specific templates for different functions on the website. Using Apply to page types, you can select a certain page type to trigger the instance. You do not have to choose a page type and if you do not, the event will be triggered by the event and place you have chosen irrespective of the page type the editor has used.

Running Instances Tab

As administrator, if you want to view the workflows that are currently in use, you can view a list of all running instances under the Running instances tab. You can reach the tab either from Administration of workflows or when you are looking at a specific definition. Here you can see who has been allocated a task, but as yet has not carried it out. You can also see those tasks that have been carried out and comments that editors have made regarding the tasks. From here, you can also delete the workflow.



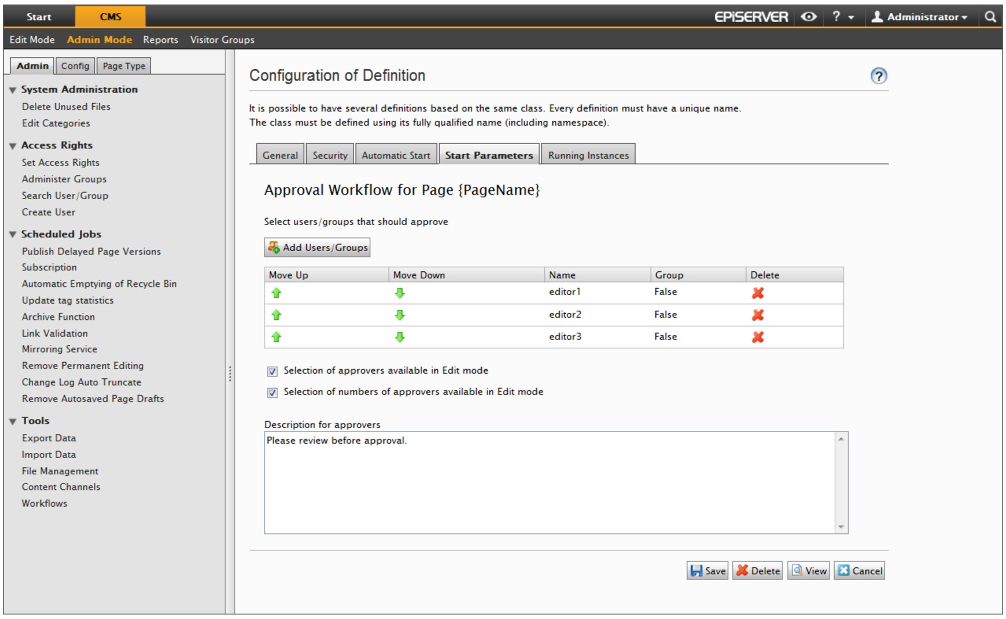
Start Parameters Tab

The contents of the **Start Parameters** tab vary for each type of workflow. The type of settings you can enter for each type are decided when you develop the workflow. In general, you try to make the workflow as adaptable as possible from Admin mode instead of hard coding in values that will probably be variable.

Sequential Approval Workflow

The Sequential Approval workflow enables sequential approval in several steps. Here we have set up a scenario in which two individuals after each other have to check product pages that editors create. One checks that the prices are correct and the other checks the text and images. In this workflow, we have the option of setting which group or individual will approve the pages. When the last individual has given their approval, the page is published.

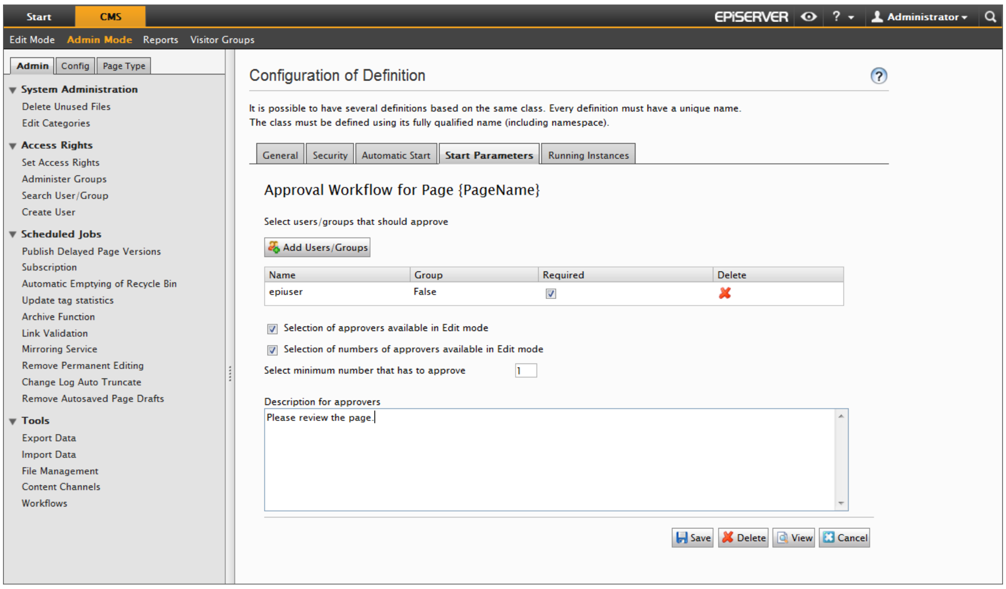
If we give the editors the access rights to edit the workflow, we should also select the **Selection of approvers available in Edit mode** check box here. Then the editor will be able to replace approvers. This also requires that we give them the access rights to make changes on the **Security** tab.



Parallel Approval of Pages Workflow

The workflow for Parallel Approval of Pages allows a workflow for approval in several steps. Here we have set up a scenario where two individuals in parallel checks news pages created. In this case, we have chosen to specify a group to approve the pages. For the **Select minimum number that has to approve** check box, we have entered two. This means that at least two people from the group must give their approval. When the second person has approved the page, the page will be published and the task removed from all other group members. If the first person does not approve the page, the page will be deleted from the others and the page will not be published.

If we give the editors the access rights to edit the workflow, we must also select **Selection of approvers available in Edit mode** and **Selection of number of approvers available in Edit mode** here. Then the editor will be able to replace approvers. They will also be able to choose the number of approving individuals. This also requires that we give them the access rights to make changes on the **Security** tab.



Translation Workflow

The workflow for content translation in EPiServer CMS supports translation management in organizations with content in multiple languages. In this scenario, some product pages are created in English, for translation into other languages. First, the sequential workflow is used for content approval, followed by the workflow for translation. When the information has been approved, the translation workflow is triggered and someone receives the task of creating a Swedish version of the same page.

In this workflow there are the following settings:

Start delay (minutes) With this parameter it is possible to delay the start of the instance. It is quite common that the first person publishes the page quickly and then sees the changes that ought to be made, so it is best that tasks are not sent every time the page is published.

Time before reminder is sent (hour) If the person/group that is to translate the page does not do this, a reminder will be sent after the period of time you specify in this field.

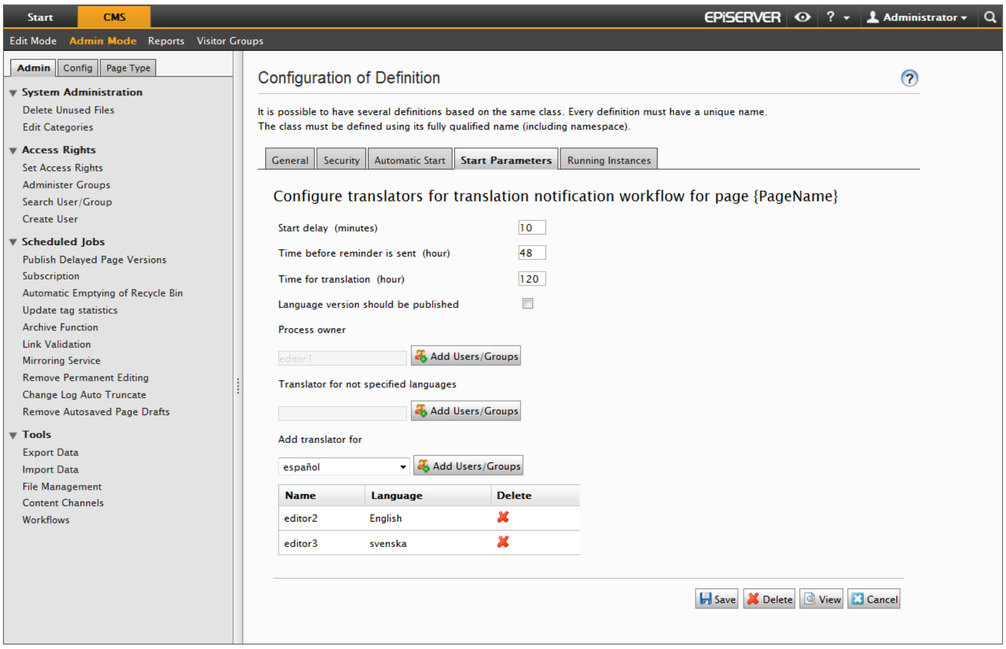
Time for translation (hour) The translation must be done and the page published before the time specified in this field. If it is not done, notification will be sent to the process owner.

Language version should be published The task is not complete before the page is published if this check box is selected. This means that the task will not disappear from the list of tasks until the page is published.

Process owner The individual or group that is the process owner will receive information from the workflow. Amongst other things notification will be sent when the page has been translated and published and if the translation has not been done within the specified time.

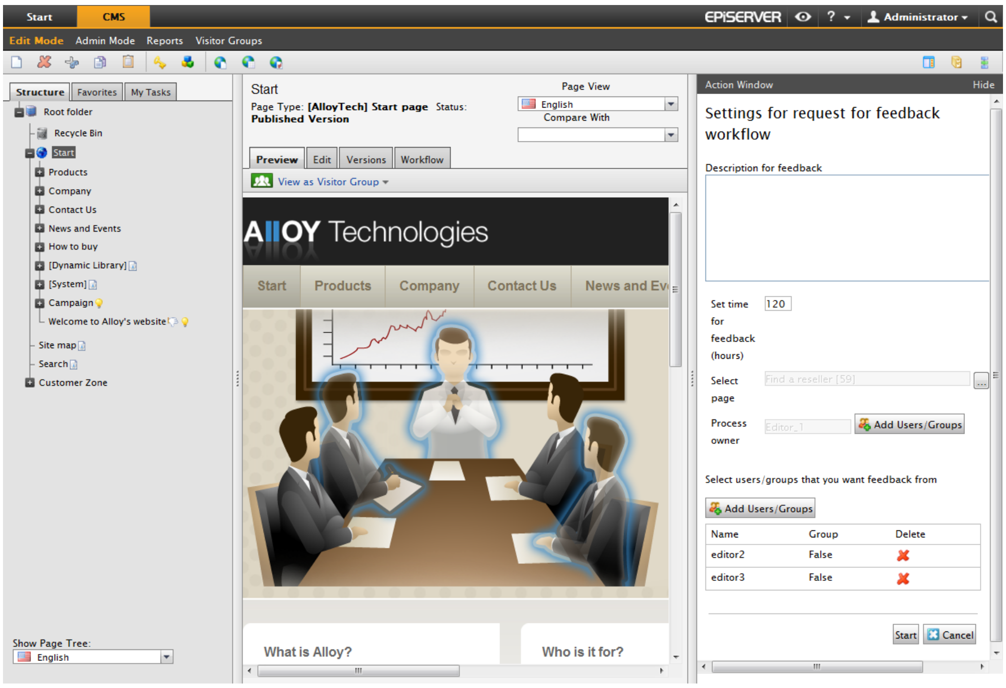
Translator for not specified languages Usually, an editor is assigned for each language. For the languages that do not have a specific editor, we can assign an individual or group to manage the other languages.

Add translator for Select the language in the drop-down list and then specify which group or user is responsible for the language. Only the languages that are activated on the website are shown in the drop-down list.



Request for Feedback Workflow

With the request for feedback workflow an editor can ask for feedback on selected content. In this scenario all editors have the right to start an instance on this workflow to ask for feedback. We have also given them access rights to write their question and decide who will give them feedback. They can also set themselves as process owners, in order to receive notifications if the task is not carried out.



Editing Definitions

If one individual finishes and another takes their place in a workflow, you can edit the existing work-flows. Select **Workflows** on the **Admin** tab in Admin mode. Existing workflows on the website are listed on the right side of the page. By clicking the **Edit** button on the workflow in the list, you can edit the workflow. Make your changes to the respective tabs and click **Save** from the top, above the tabs.

Deleting Definitions

If you want to delete an entire workflow, you can do this from Admin mode. Select **Workflow** on the **Admin** tab in Admin mode. Existing workflows on the website are listed on the right side of the page. By clicking the **Delete** button, you delete the definition of the workflow.

Note that all activated instances within this workflow will be closed if you delete it.

System Configuration

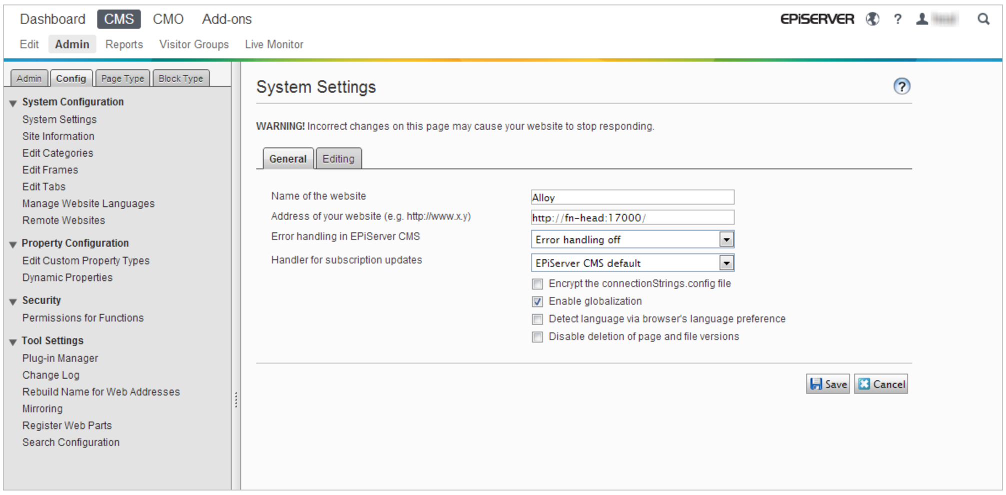
When installing EPiServer CMS in live operational environments, many settings are configured once and then seldom modified. They can include various settings for visitors and editors, as well as purely technical fixes.

The majority of these settings are made in the **Config** tab in admin mode. Some settings are also done in **Internet Information Services (IIS) Manager**. Other settings are made in configuration files on the server.

System Settings

In system settings, you apply settings for the EPiServer CMS installation. You can change error handling, paths to other parts of the web server etc. These settings are usually set during installation and seldom modified.

General Tab



Name of the website

The name that will be displayed in the title bar, at the top of the web browser's window.

Address of your website

The address of a website is used on several occasions in EPiServer CMS, such as in subscriptions. Enter the address of your website in this field, so that the correct information is sent to the users.

Error handling in EPiServer CMS

Select how you would like the errors to be handled, whether it should be active for all visitors, remote visitors or should be disabled.

E-mail address to send error reports to

Enter an e-mail address to which you would like the error reports to be sent.

Handler for subscription updates

There is a subscription function in EPiServer CMS that allows visitors to the website to receive information about new and updated pages. Depending on whether you have a website with multi-language support, you can select how the subscription dispatch is to be managed. This list can also include your own solutions for the subscription function.

Encrypt the connectionStrings.config file

The connectionStrings.config file contains sensitive information sent to and from the database. To ensure that nobody can read the information, you must encrypt the file. Select the check box and save the system settings.

Enable globalization

EPiServer CMS supports management of content in multiple languages. To gain access to this support, globalization must be activated. This is done by selecting the Enable Globalization check box.

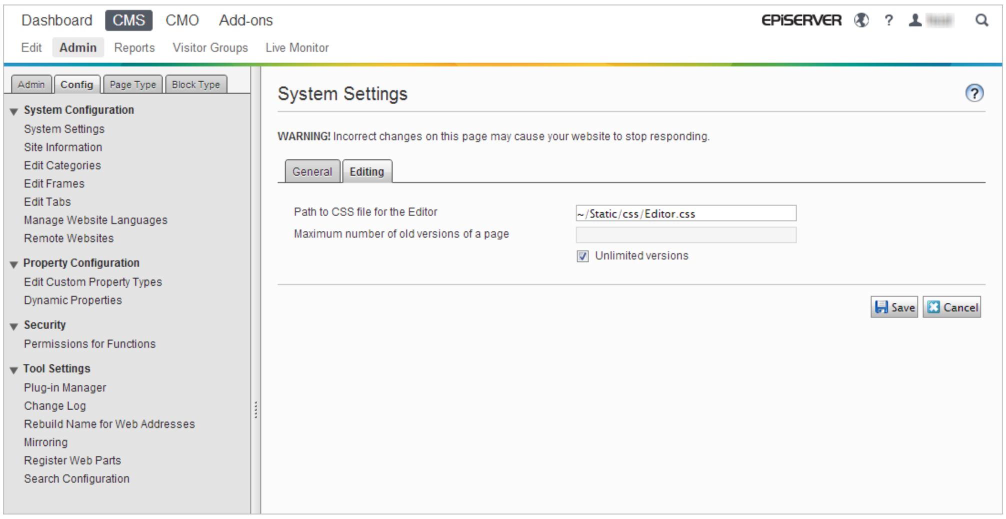
Detect language via browser's language preference

It is possible to show languages based upon the visitor's browser settings. For this to work, the function must be activated. Do this by selecting the **Detect language via browser's language** settings check box.

Disable deletion of a page and file versions

Select this check box if you want to disable the possibility for editors to delete old versions of pages and files. When you select this check box, any values in the **Maximum number of old versions of a page** and **Unlimited versions** field in the **Editing** tab will be ignored.

Editing Tab



Path to CSS file for the Editor

The path to the CSS file that controls the appearance of the Rich-Text Editor. This could be the same or a similar CSS file as the site uses for styling content so that the editors get the same look and feel as the site when editing content. It is also possible to set other CSS files for different editors on the website. This is a dynamic property that can be changed in edit mode.

Maximum number of old versions of a page

In this field, you can specify how many old versions of each page the editor can store. If you enter a value here, such as 3, three old versions will be stored in addition to the published version, in other words four versions in all. When a fifth version is created, the first version of the stored page will disappear.

Unlimited versions

Select this check box if you want an unlimited amount of versions to be displayed in the version list.

Site Information (Configured Sites)

Site Information/Configured Sites lists all the site configurations you have defined. The list may contain one or more site configurations depending on your website setup.

The following options are available:

- Clicking on any of the **Site ID links** in the list sends you to the **Site/License Information** page which displays more detailed information about that site's configuration. From here you can update the site information.
- **Add Site** allows you to add sites to the list.
- The **Restart Sites** option will restart all the sites in the list.

Site Information Tab

On this tab you can view and modify settings for a specific site configuration.

Site Section

- Site ID – a word or short text that identifies the site.
- Site URL – the URL that is used to construct links when no HTTP context is available, for instance in subscription mail.
- Start page – the page to which the visitor is sent if only a host name is specified.
- Here you also define if you want to use a site specific folder for content blocks.

Host Name Section

The settings in the **Host Name** section enables you to define which host names are associated with this site and specify default languages to be used when a visitor uses a specific host name. Each host name binding in the list consists of two fields:

- Host name – the name of the host.
- Culture – the default language to be used when a visitor accesses the website using the host name.

One of the site configurations must be bound to the * host name. That site will be used as a fallback when an exact match for the host name used by the visitor cannot be found. This setting is less important in the single site scenario as you are only allowed to have one site configuration. However, in the multi-site scenario you must make sure that all host bindings that are active in IIS are mirrored in the corresponding site configuration.

License Information

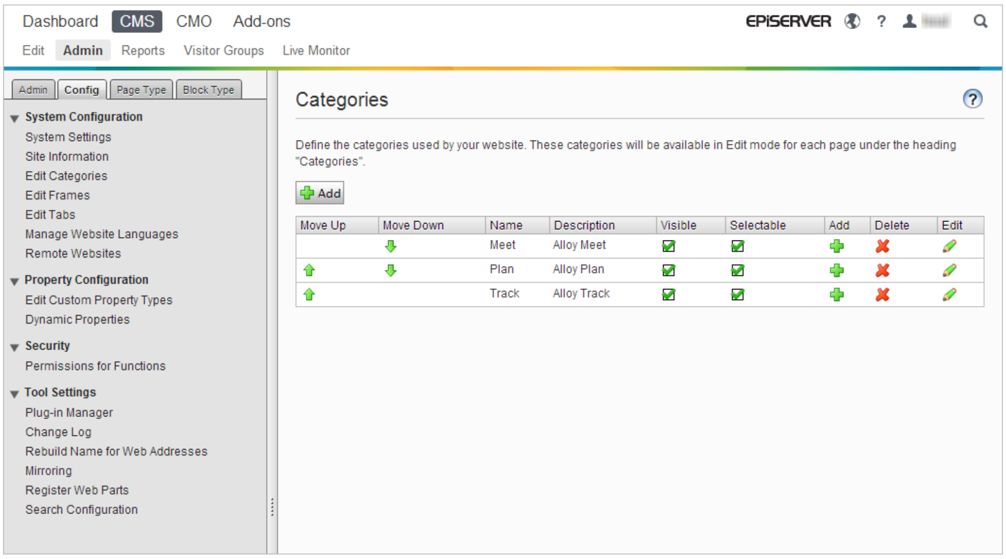
In the CMS administration interface under the **Admin** tab in the **Tools** section, you can access license information for your website. **License Information** is a display view showing information about the currently used EPiServer licenses, including all licenses per site, server and product.

Edit Categories

Categories in EPiServer CMS can be used to categorize information to use for instance in filtering features for search and navigation. Categories are defined under **Edit Categories** in admin mode, and applied to content in edit mode. Only categories set as **Visible** will be available for selection in edit mode.

Add a new category as follows:

1. Select **Edit Categories** on the **Admin** tab.



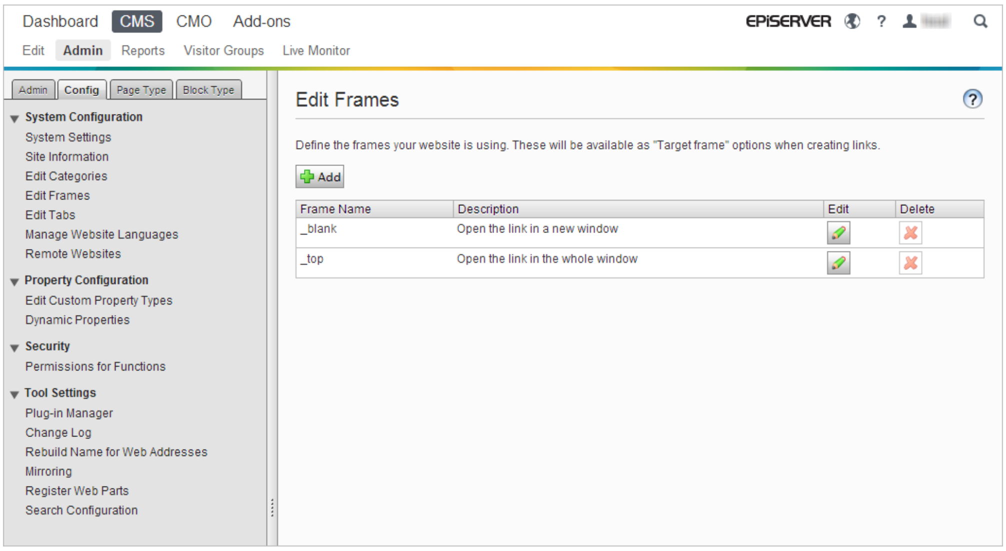
2. Click **Add** to add new main categories.
3. Specify a name in the **Name** field. This name is used when programming.
4. Enter a description in the **Description** field. This name is seen by the editors when selecting a category. These fields can also be language encoded.
5. Click **Save**.

You have the following options:

	Add a category under the selected category. Note that no changes will be made until you click **Save** for the category.
	Click **Edit** to edit information about a category and save your changes.
	Move category up the list.
	Move category down the list.
	Delete a category from the list.

Edit Frames

If you have chosen to use frames on your website, there may be times when an editor must be able to open a link in a particular area of the frame. The names of any frames used by the system are defined here. These designations are accessible in edit mode, whenever the editor must designate a target frame for his/her links.

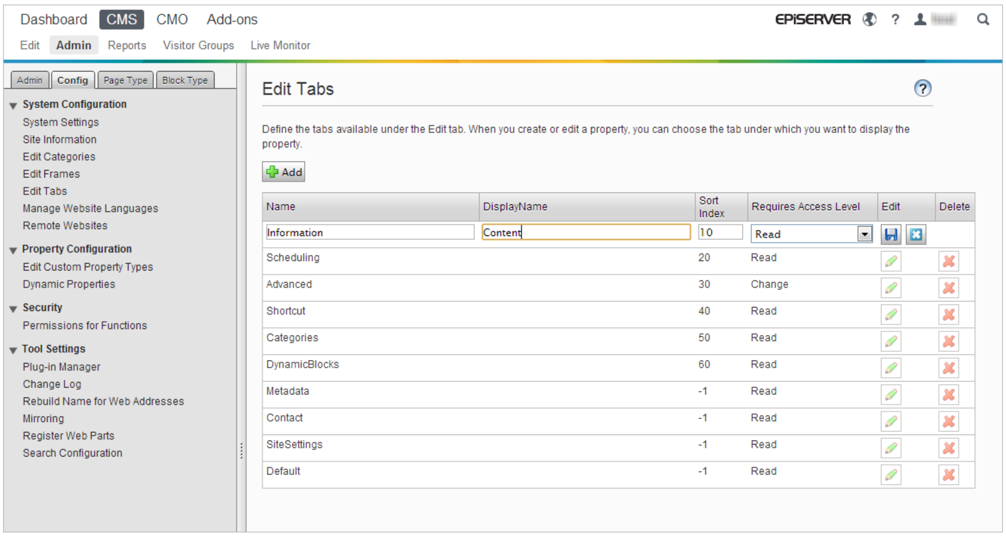


Edit Tabs

You can divide your properties onto several tabs by selecting the Edit Tabs function. Here you can also decide in which order the tabs should be in, and apply access level to a certain tab.

Adding and Editing a Tab

1. On the **Page Type** tab, select **Edit Tabs**.



2. Click **Add** to create a new tab. Click the **Edit** icon to edit a tab.
3. In **Tab**, name the tab.
4. In **Sort Index**Specify the index amount for the tab. The lower the value the further to the left the tab is placed.
5. In **Requires Access Level**, you can select which access level should apply for an editor to see the tab. It is linked to the access the editor has for the page.
6. Click **Save**.

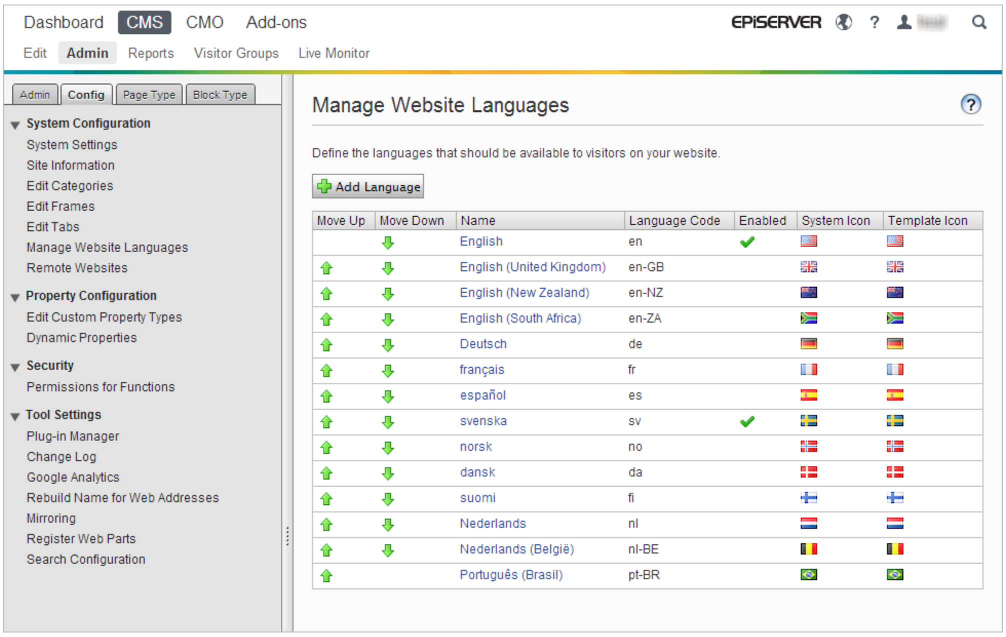
Deleting a Tab

Delete a tab by clicking the **Delete** icon to the right.

Managing Website Languages

If you want your editors to be able to create content in a particular language, the language must be added and activated for use. This is done under **Manage Website Languages**.

When you open **Manage Website Languages**, all the languages added to the website are shown in a long list and you can immediately see which languages are available and whether they are active. Change the settings for a language by clicking the language's name. You can adjust the order of the various languages using the arrows to the left of the language.



Languages on a Globalized Website

For an editor to be able to create content in several different languages, the language must be added and enabled under **Manage Website Languages**. It is possible to change the access level for a language, so that certain editors cannot create or edit pages in a certain language.

Creating Globalized Content Work Procedure

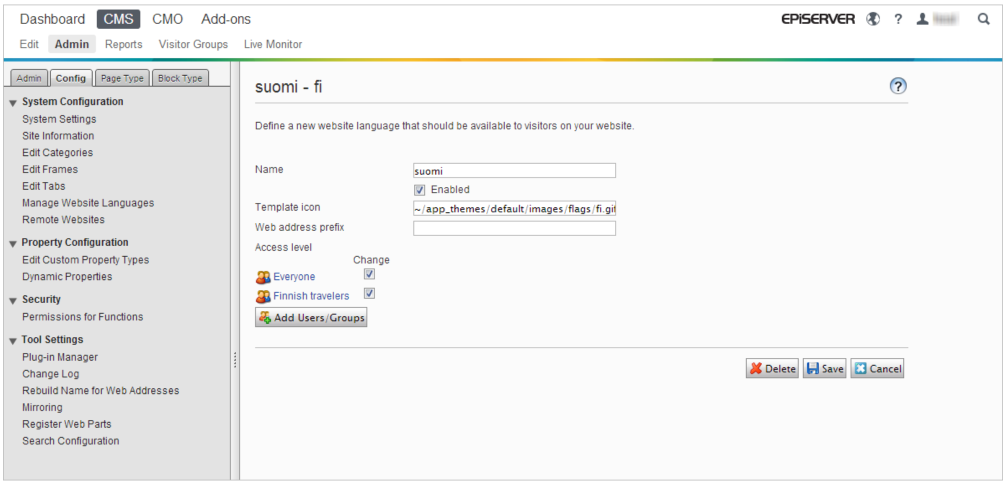
Create globalized content in the following steps:

1. The administrator adds a new language to the website. The administrator can also set up access levels for each language.
2. The administrator enables the language to be active in the editorial interface under **Language Settings**.
3. The editor selects the new language under the **Sites** tab.
4. The editor creates content in the new language. Previews the globalized content, publishes or continues to work with it.

Adding or Editing a Language

1. Select **Manage Website Languages** on the **Config** tab.

2. Click **Add Language**.



3. A list of available language codes appears. Select the language code you want your language to use by clicking the name.
4. In the **Name** field, enter a name for that language. This is this name that will be shown to the editor. The field is filled in with the name of the language encoding, but you can change this if you wish.
5. Select **Enabled** if you want the language to be active for editing in edit mode. The **Enabled** check box also affects whether the language will be available to website visitors and accessible in View mode. When a language is disabled, it will not be visible in edit mode. Existing content is however still accessible, but cannot be edited.

> Setting a language to disabled is the recommended way of removing a language from a website.

6. In the **Template icon** field you can enter the path to an icon that will symbolize the language. There are a number of flags stored in the C:\Program Files\EPiServer\CMS\<release>\Application\App_Themes\Default\Images folder. If you are going to make your own icons, these should measure 15x15 pixels so that they fit properly in the edit mode.

> The images defined in the **Template icon** field are dependent on the image functionality being programmed in the templates on the website.

7. In the **Web address prefix** field, you can provide a specific prefix to show the content of the relevant language. If you do not provide a prefix, the language code will be used, for example www.company.com/nl.
8. If you would like access to the language to be restricted for certain users and/or groups, specify this by changing the users and groups under **Access level**. The access level is a filter, which defines which users will have access to create and edit pages in a certain language.
9. Click **Save**.

Changing the Access Level for a Language

When a new language is added, by default it will be available for the **Everyone** group. Users that do not have access levels for a language will not have the language in the drop-down list in the **Structure** tab, and will not be able to create pages in that language.

1. Delete the access level for a group or user that currently has access level to a certain language by clearing the **Change** check box and then clicking **Save**.
2. To grant a user or group access to create and edit pages in a certain language, click Add users/Groups and select the relevant users or groups. Make sure that the **Change** check box is selected and click **Save**.

Deleting an Existing Language

1. Select **Manage Website Languages** on the **Config** tab.
2. Click the language's name.
3. Click **Delete**.

> This is not the recommended way of removing a language from a website. This should preferably be done by disabling the language.

Fields that Vary per Language

When you work with globalization, you define in every template which fields will vary depending upon the language by setting whether the property for that field should be "locked" for globalization or "open". This is done by using the **unique value per language** setting.

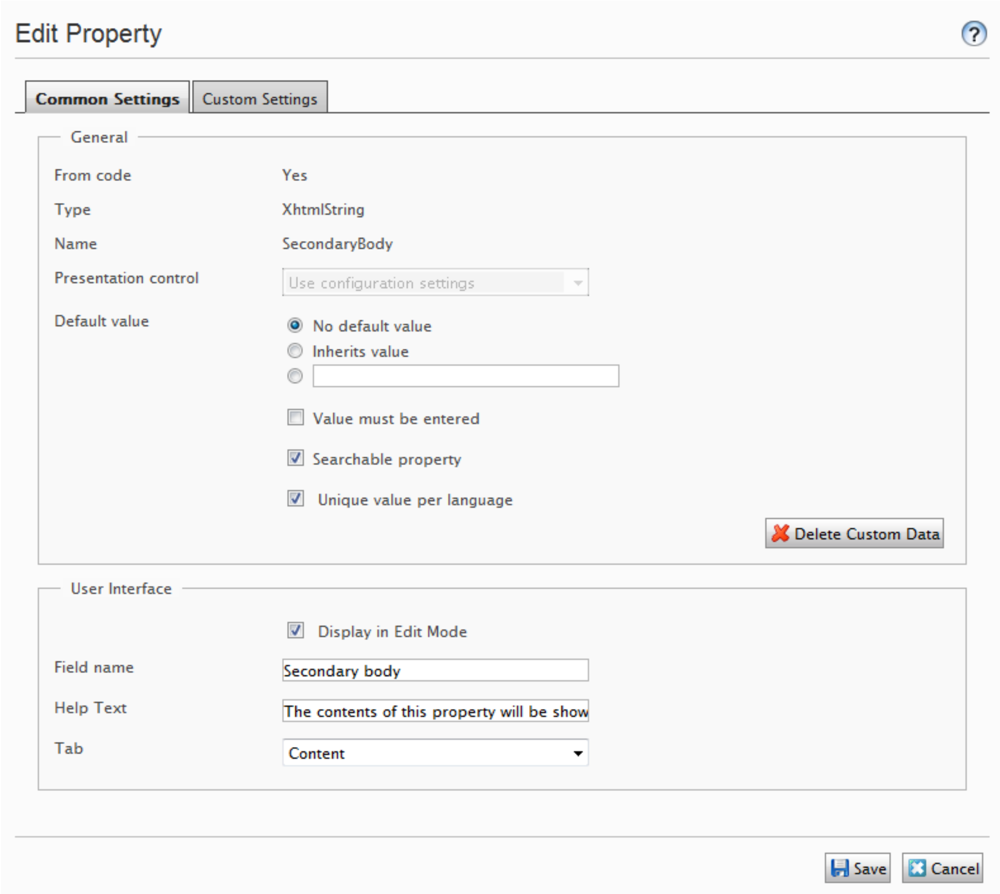
Properties that are set as a unique value per language are editable in all languages enabled on the website. This is normally the case, for example, in the property forming the HTML editor, so that editors can enter content for the pages in the different languages. Properties that are not set as a unique value per language can only be edited in the language in which the page was created (the original page language). These fields will be grayed out in edit mode with an icon indicating which language is the original language.

> Imagine that the property defining the sort order field is not set as being a unique value per language, i.e. the **Unique value per language** check box is not selected. When you create a new page, you will be able to set the sort order in the original page language, but when you create a version of the page in another language, the sort order field will not be editable. This results in the sort order being the same for all the languages on the website. If you want the sort order to be different for each language, select the **Unique value per language** check box.

> When a property is changed from being a unique value per language to not being a unique value, all the existing values for that property will be deleted. This means that if the property for the editor is changed to not have a unique language, all the text that has been entered in the editor for all the languages on the website will be permanently deleted.

Set a property to be editable per language as follows:

1. Select the page type that contains the property to be set on the **Page Type** tab.



2. Click the name of the property that you wish to modify.
3. Select the **Unique value per language** check box.
4. Click **Save**.

Access Level for Languages

When a new language is added, by default it will be available for the **Everyone** group. Users that do not have access levels for a language will not have the language in the drop-down list in the **Structure** tab, and will not be able to create pages in that language, see *Change the Access Level for a Language*.

Remote Websites

The remote websites function enables to you to retrieve information from different EPiServer websites. This is commonly used for load balancing and content mirroring. Editors need only create information in one place, but it can be displayed in all. With the **Remote Websites** function, you create the connections to the websites that you want to be able to send information to and from. The settings are done in admin mode and in the configuration files for the websites.

Refer to the *Developer Guide in the EPiServer CMS SDK*.

Permissions for Functions

The following functions in edit mode requires the setting of access rights through the **Permissions for Functions** features:

- **Detailed error messages for troubleshooting** provides one or more groups/individuals with access to detailed error messages. In **System Settings**, it is possible to activate a function that provides visitors with a form to fill in whenever there is a technical error on the website. By changing the access rights here, you can specify who should receive these forms.
- **Allow the user to act as a web service user** allows a user to call one of the web services provided by EPiServer. This function is only used for system integration purposes.
- **Allow users to move data/pages between page providers** allows a limited group to move pages between the page providers. This function is only used if the website is using a custom page provider integrated with another system. Since data will be deleted in the source provider, you may want to limit the access to this function.

Adding/Changing Permissions to a Function for a Group or User

1. Select **Edit** for the function you want to modify. Existing groups or users with access appear in a list.
2. Select **Add Users/Groups** if you want to give users or groups access to this function.
3. The groups and persons in the system appear in the window that opens. Double-click the name to add the group or user.
4. Select **OK**.
5. The group or user appears in the list with its check box selected. This means that the group or user has access to this function.
6. Select **Save**.

Deleting Permissions to a Function for a Group or User

1. Select **Edit** for the function you want to modify. Existing groups or users with access appear in a list.
2. Clear the check box of the group or user for which you want to remove access.
3. Select **Save**.

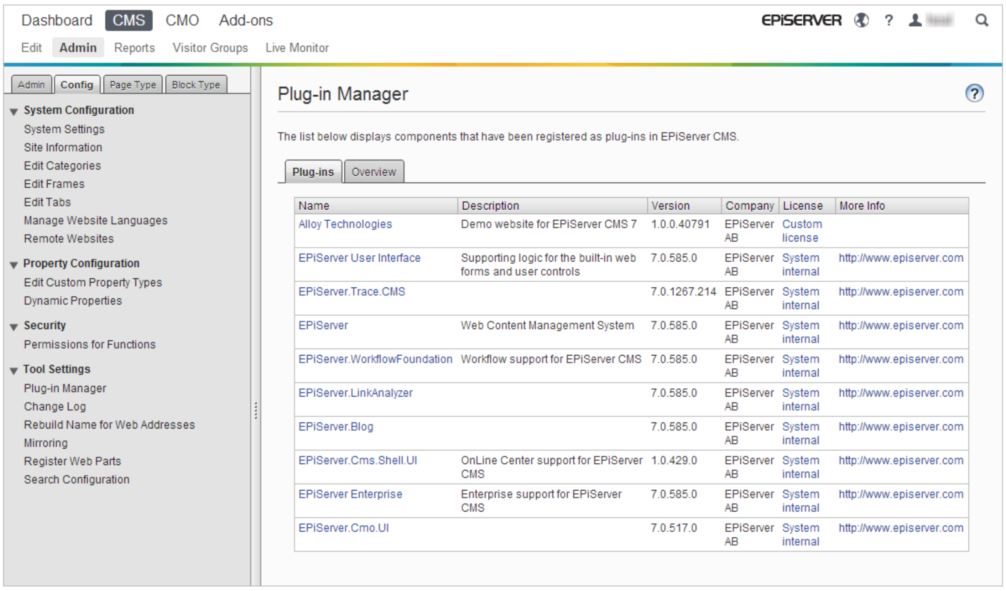
For more information on how to work with access rights for users, groups and pages, refer to the *Access Rights* section in this documentation.

Tool Settings

Under **Tool Settings**, you will find miscellaneous functions for integration and configuration of EPiServer CMS.

Plug-in Management

Many of the functions in EPiServer CMS are created as plug-ins, which can be managed from the **Plug-in Manager**. Selected parts can be activated and deactivated. If your organization has invested in any additional plug-ins, these can also be found in the Plug-in Manager. When you have chosen a certain plug-in, you can choose which parts of the plug-in are to be accessible in the **Overview** tab.



Change Log

By default all changes to pages, files and directories are currently logged in the Change Log system. It is possible to filter the information contained in the Change Log making it easier to find relevant information, see below for further information.

Changing the Change Log State

1. In admin mode, go to the **Config** tab and select **Change Log** under **Tool Settings**.
2. To change the change log, select the desired state from the drop-down list. The available states are Auto, Enabled and Disabled.

- **Enabled** means that the change log tracker will start automatically and items can be written to and read from the change log
- **Disabled** means that the change log tracker will not start, items written to the change log will be ignored but items may still be read from the change log
- **Auto** means that the change log tracker will start as soon as any dependencies have been registered against the change log. If no dependencies exist, then the tracker will not start or will stop if already running. Items can be written to and read from the change log at any time.

Filtering and View the Change Log

1. Filter and view the change log items in the **View** tab. Enter values in the fields according to the table.

Field Name	Description
Change date from	The query will be run from the change log from this date.
Change date to	The query shall be run from the change log to this date.
Category	By not selecting an item from the drop-down list Page, File and Directory changes will be read from the Change Log when the query is run. • Select **Page** to run a query on pages only. • Select **File** to run a query on Files only. • Select **Directory** to run a query on pages directories only.
Action	The actions that can be filtered in the Change Log are: Check In, Create, Delete, Delete language, Move, Publish, Save and Delete Children.
Changed By	To filter for a specific user enter the EPiServer CMS username.
Maximum number of items per page	Limits the number of items displayed. Click the next and previous arrows to browse through the list of items.
Start with sequence number	Enter a specific sequence number to start listing the items in the change log from, either in ascending or descending order.
Read direction	List change log items in either ascending or descending order.

2. After entering the values in the fields click **Read** to run the query. A list of the matching change log items will then be displayed.

It is possible to remove all items from the change log that are more than one month old and without dependencies with the *change log auto truncate scheduled job*.

Website developers can easily customize and extend the change log functionality. Consult your website developer for further assistance.

Rebuild Name for Web Addresses

The **Rebuild Name for Web Addresses** function is used for getting and changing addresses in the address field. When a visitor looks at a certain page on a website based on EPiServer CMS, a path to the page is shown in the address field, as in the example below. The address reflects the page's place in the structure.

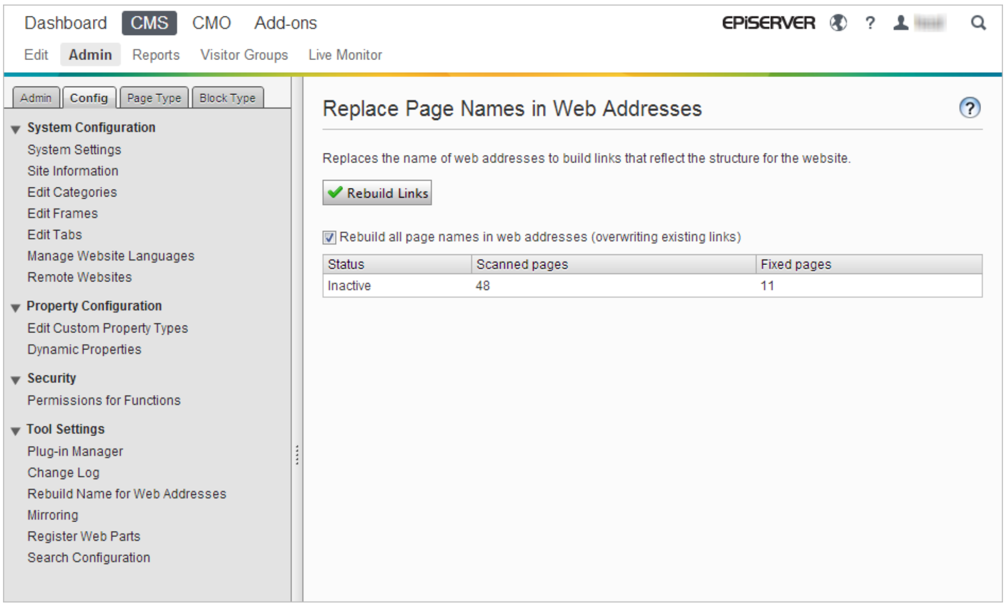
The names in the address field are created automatically from the name an editor has specified for the page. If an editor changes the name of the page, the name in the address field will not change. This can however be changed manually by changing the field **Page name in web address** on the **Settings** tab.

Some pages have no value in the field for names in web address. This could, for example, be pages imported from other EPiServer solutions. With the **Rebuild Name for Web Addresses** function you can create all the web addresses for the website at the same time. It is also possible to change all the existing addresses and overwrite them with new ones.

This function can affect links to the website. All internal links are managed and updated automatically, so you do not have to worry about these. There can however be other websites that have linked to a certain page and this can mean that such a link will be broken. It can also affect the favorites that visitors have in their web browsers.

Rebuild names for web addresses as follows:

1. Select **Rebuild Name for Web Addresses** on the **Config** tab.



2. If you want to overwrite existing addresses, select **Rebuild all page names in web addresses (overwriting existing links)**.
3. Click **Rebuild links**.

Mirroring

Mirroring can be used to duplicate content between websites. EPiServer CMS can mirror selected parts or an entire website and can either run automatically or manually. This is useful if you wish to create sections in a test environment and then publish all the information at once in the public section.

The mirroring jobs are carried out at certain time intervals. You can define how often and when the mirroring will occur on the **Admin** tab > **Scheduled jobs** > **Mirroring Service**.

In order for mirroring to work in an EPiServer CMS website, a mirroring application needs to be installed and running. The mirroring application handles the data transfer between the websites and is run separately to the EPiServer CMS source site and target sites. Source and target websites can be configured to use separate mirroring applications, it is also possible to install and configure a single mirroring application. The mirroring application is installed with the EPiServer Deployment Center. For further information regarding configuring mirroring, see the section in *EPiServer CMS SDK* > *Developer Guide*.

Setting Up Mirroring

To set up mirroring from one website to another channels need to be created in admin mode. Channels define the mirroring jobs from one EPiServer CMS to another, or even another external recipient.

Go to the source site in admin mode > **Config** tab > **Tool Settings** > **Mirroring** to create and edit channels for mirroring.

Creating a Channel

Create a channel as follows:

1. Click **Create**. Mirror Settings will be displayed.
2. Enter values for the channel. See the table below for information regarding the respective fields.
3. After entering the values in the fields, click **Save**.

Field Name	Description
Name	Enter a name for the channel in the **Name** field.
Parameters	This is an optional field that can be used by providers.
Use default URI	Select this check box to use the URI defined in the configuration file (web.config) for the mirroring application. When you select this check box, the **URI** field will be disabled.
URI	The URI to the destination mirroring application's target service, for example http://-localhost/R3Mirroring/Mirroring/MirroringTransferServer.svc. The service for the default provider is “MirroringTransferServer.svc”.
Start page	The root page on the source site to be mirrored.
Root page on destination	The page number on the target site where the pages will be mirrored.
Include the start page	This field determines if the start page will be mirrored or if only its children will be mirrored.
Import as anonymous user	Run as anonymous user, determines if a special user will do the export and import of pages and files when the mirroring job is run.
Import content as user	Enter the username of a user that will perform the export and import of pages and files when the mirroring job is run.
Enable reporting	Select this check box to enable reporting to an e-mail. When you select this, the **E-mail address** field will become editable.
E-mail address	Enter the e-mail address where a report will be sent.
Continue on error	Select this check box to enable a mirroring job to continue mirroring subsequent items if a specific item cannot be mirrored. If this box is not selected, a mirroring job will terminate as soon as an error occurs.
Enabled	This field determines if the channel is active or not. If it is not enabled, nothing will be mirrored for the channel.
Enable validation	Select this check box to enable validation before items are mirrored. The mirroring job will validate that all page types for pages being mirrored are present in the target site and that the page type has the same number and type of page properties as the source site.

Editing a Channel

To edit a channel, click the name of the channel, update the fields as appropriate and click **Save**.

Deleting a Channel

To delete a channel, click the name of the channel and **Delete**.

- **Reset Channel**. Select **Reset State** and the mirroring application will re-mirror everything from the root page of the mirroring channel to the source site next time it is run. Click the name of the mirroring channel and then click **Reset**.
- **Check System**. To validate the created channel, click **Check System**. The result of this will be displayed under the **Messages** tab.
- **Messages**. The result of a check system is listed in the **Messages** tab. Click the arrow icon to view the result and other information regarding previous mirroring jobs that have been run.
- **Monitoring**. The status of a mirroring job is displayed in the **Monitoring** tab.
- **Target site configuration**. To use a site as a mirroring target, some configuration is required. See the mirroring tech notes for further information regarding mirroring configuration.
- **Mirror Pages to a Target Site**. To create a target page, go to edit mode on the target site and create a page that will act as the root page for the mirrored pages. It is also possible to use an existing page as the mirroring root page. In order to publish pages, the mirroring application needs to be installed and configuration needs to be implemented. Read the mirroring tech notes for information regarding this.
- **Mirroring in other Formats**. Mirroring in formats other than EPiServer CMS Import/Export format can be created by partners and customers themselves and plugged-in using the provider model. See the mirroring tech note for further information.

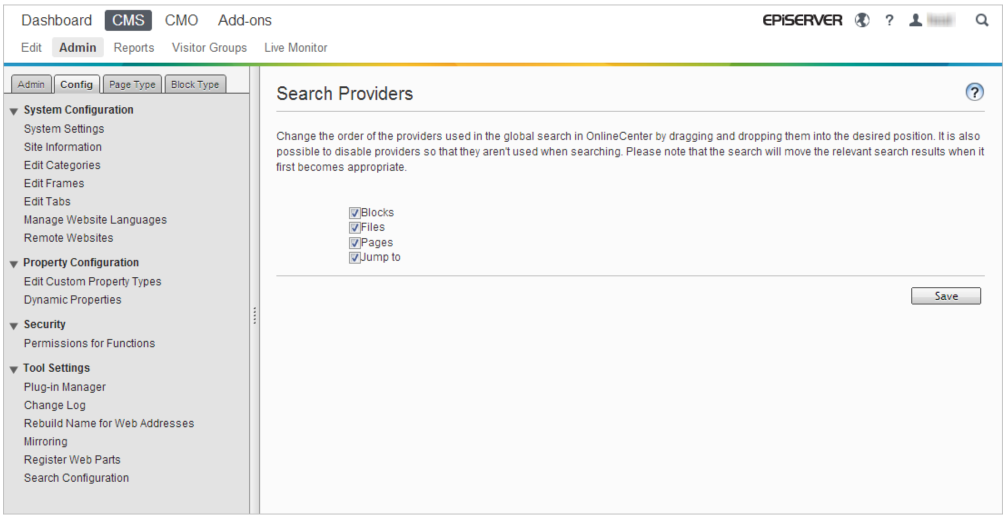
Search Configuration

It is possible to configure different **search providers** for the modules in your website implementation. A search provider can be for instance pages, files, categories, forums or page types. The standard installation of EPiServer CMS comes with two search providers, **Pages** and **Files**. To configure additional search providers for your website, check with your system administrator and refer to the *Developer Guide in the EPiServer Framework SDK*.

You can decide which search providers you want to enable, and the order in which they will appear in the search hit list. To access these settings, switch to the admin mode and select **Search Configuration** under the **Config** tab. The following options are available for a standard installation:

- **Jump to**. Selecting this option will make it possible to jump from the search hit list directly to **menu alternatives** matching your search criteria.
- **Pages**. Selecting this option will allow for search in pages on the website.
- **Files**. Selecting this option will allow for search in files on the website.

You can drag and drop the search provider options to change the order between them. This will control the order in which the results will be displayed in the hit list. Clearing a checkbox will disable this search provider option. Select **Save** to save your changes.


Dashboard
CMS
CMO
Add-ons
EPiSERVER
Edit
Admin
Reports
Visitor Groups
Live Monitor
Admin
Config
Page Type
Block Type
System Configuration
System Settings
Site Information
Edit Categories
Edit Frames
Edit Tabs
Manage Website Languages
Remote Websites
Property Configuration
Edit Custom Property Types
Dynamic Properties
Security
Permissions for Functions
Tool Settings
Plug-in Manager
Change Log
Rebuild Name for Web Addresses
Mirroring
Register Web Parts
Search Configuration
Search Providers
Change the order of the providers used in the global search in OnlineCenter by dragging and dropping them into the desired position. It is also possible to disable providers so that they aren't used when searching. Please note that the search will move the relevant search results when it first becomes appropriate.
Blocks
Files
Pages
Jump to
Save

Properties

"Page properties" is a central concept in EPiServer CMS. Properties are used in *page types* and *block types* to store and present data, and they are the "fields" where editors enter information into a page type. A property can be for instance the page name, an image placeholder or the "Editor", where text can be added. For example, the HTML editor is a property of the type "XHTML String (>255)" , which will result in an editorial area in the page type when used.

For the property content to be visible to visitors, it must be linked to a **page type** with a corresponding **page template** for display.

Properties can be defined either in **code** or from admin mode. For certain properties that are defined in code it is possible to do "non-breaking" changes in admin mode. If a property is defined in code and cannot be changed in admin mode, information about this will be displayed. If you do changes to a property defined in code, it is possible to reset the changes to the values that were defined in the code.

For related information, see also the *Page Types* and *Block Types* sections in this documentation.

In the administration interface, the property settings can be found under the **Config** tab in the **Property Configuration** section, and when working with page types and block types under the **Page Type** and **Block Type** tabs.

Configuring Properties

Properties to be used on pages, page types and block types are defined in code and under **Property Configuration** on the **Config** tab in admin mode.

The following types of properties are used in EPiServer CMS:

- **Built-in properties** are set by the EPiServer CMS system. For example, **PageName** (name of the web page) and **PageStartPublish** (start publish date for the page).
- **User-defined properties** are added to the page or block type definition. For example, **Heading** and **MainBody**.
- **Dynamic properties** are set on page level and inherited by child pages.

Properties can be created, named and given a data type and other settings in admin mode (or through code). The editors only have to provide a value for the property in edit mode.

Dynamic properties are inherited and when defined on a selected page, the property will be inherited to the subpages. If you have other values stored on one of the subpages, you can choose to retain them or overwrite the values. Applying dynamic properties to pages is done from the **Dynamic Properties** option in edit mode.

In admin mode, property types can be added and edited under the **Edit Custom Property Types** section. Dynamic properties are added and edited under the **Dynamic Properties** section.

You can create new *property types* by inheriting from the existing ones. Below is a selection of available property types.

Blocks can only be created from code, and therefore this property type is not available when adding properties in admin mode.

Data Type Name	Data Type	Description
Boolean	Selected/not selected	True or false.

Data Type Name	Data Type	Description
Number	Integer	An integer.
FloatNumber	Floating point number	Number with decimals, for example, 3.14.
PageType	Page Type	EPiServer CMS page type defined in admin mode.
PageReference	Page	Link to a web page.
Date	Date/Time	Date and time.
String	String (<=255)	Short text, fewer than 256 characters in length.
LongString	Long String (>255)	Used for text that can exceed 255 characters in length, for example the main editor area field in edit mode.
Category	Category selection	List of categories.
LinkCollection	Link collection	A collection of links.

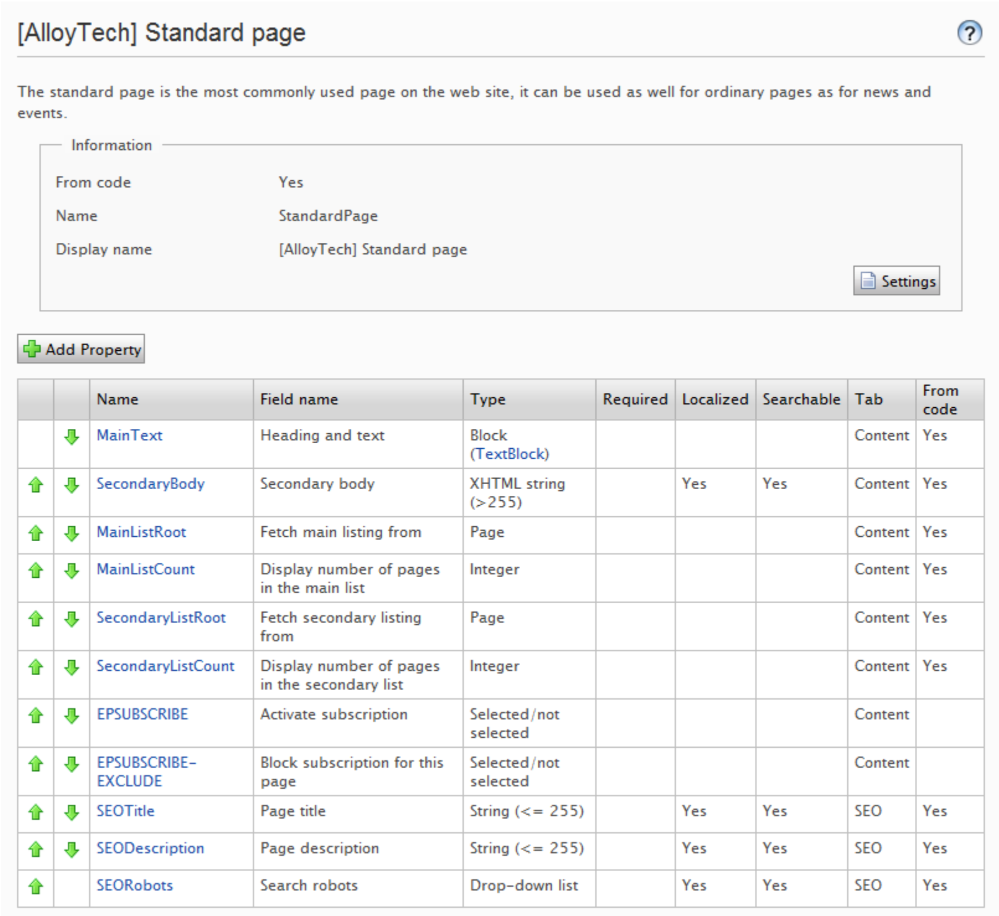
For more information about property configuration, see the *Developer Guide in the EPiServer CMS SDK*.

Organizing Properties in Page and Block Types

The order in which properties (fields) are displayed to editors in a page or block type can be altered. Fields can also be moved between tabs in a page type. These changes are done for each page type **Admin** mode.

Change the field order

1. Select the page or block type for which you want to change the order of the fields on the **Page Type** or **Block Type** tab.



[AlloyTech] Standard page

The standard page is the most commonly used page on the web site, it can be used as well for ordinary pages as for news and events.

Information

From code Yes

Name StandardPage

Display name [AlloyTech] Standard page

Settings

Add Property

		Name	Field name	Type	Required	Localized	Searchable	Tab	From code
	⇩	MainText	Heading and text	Block (TextBlock)				Content	Yes
⇧	⇩	SecondaryBody	Secondary body	XHTML string (>255)		Yes	Yes	Content	Yes
⇧	⇩	MainListRoot	Fetch main listing from	Page				Content	Yes
⇧	⇩	MainListCount	Display number of pages in the main list	Integer				Content	Yes
⇧	⇩	SecondaryListRoot	Fetch secondary listing from	Page				Content	Yes
⇧	⇩	SecondaryListCount	Display number of pages in the secondary list	Integer				Content	Yes
⇧	⇩	EPSUBSCRIBE	Activate subscription	Selected/not selected				Content	
⇧	⇩	EPSUBSCRIBE-EXCLUDE	Block subscription for this page	Selected/not selected				Content	
⇧	⇩	SEOTitle	Page title	String (<= 255)		Yes	Yes	SEO	Yes
⇧	⇩	SEODescription	Page description	String (<= 255)		Yes	Yes	SEO	Yes
⇧		SEORobots	Search robots	Drop-down list		Yes	Yes	SEO	Yes

2. All properties (fields) are listed on the page in the order that they are in now.
3. Move a property by clicking the up or down arrow depending on the order you want.
4. It is also possible to drag and drop the properties to the appropriate position.

Select which tab a certain property is to be placed on

1. Select the page type with the property you wish to place on a particular tab on the **Page Type** tab.
2. Click the name of the property that you wish to modify.
3. In the **Tab** drop-down list you can select on which tab the relevant property is to be placed.
4. Click **Save**.

For more information on how to work with tabs, refer to *Edit Tabs*. For more information about page types, refer to *Page Types*.

Editing and Adding Properties

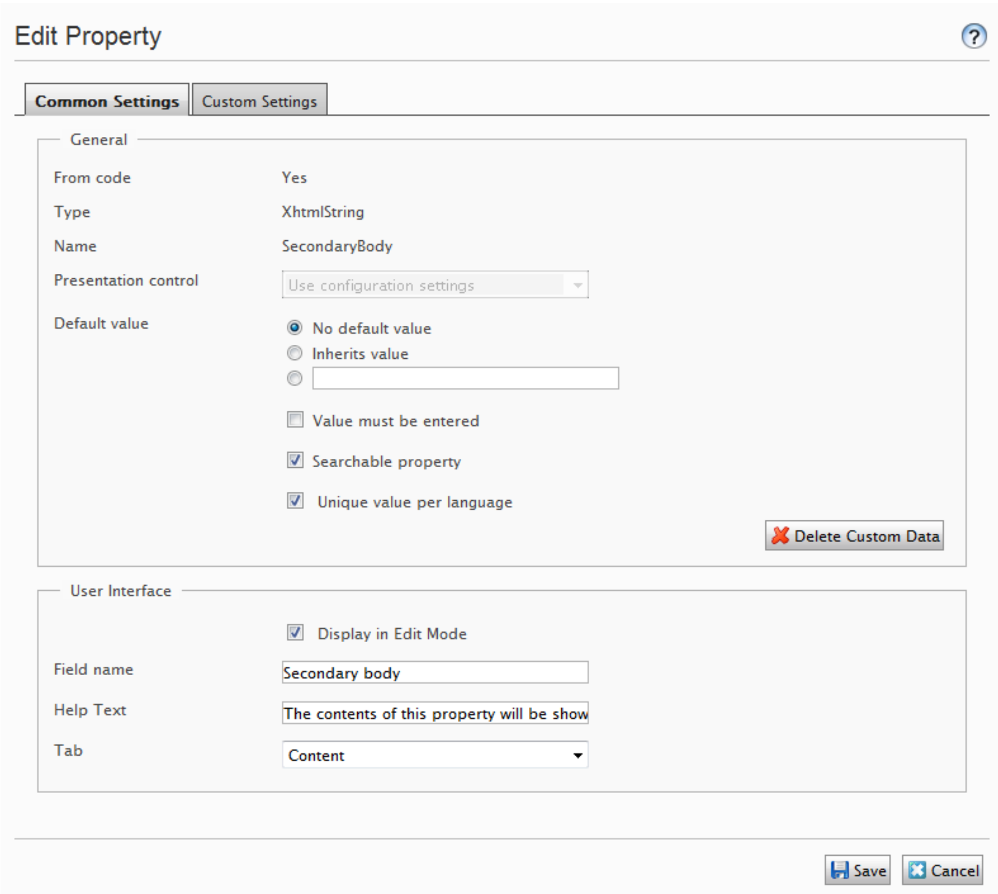
When editing and adding properties, there are two tabs available:

- **Common Settings** - where you edited the common settings for the selected property.
- **Custom Settings** - depending on the property selected, there might be custom settings available for editing here.

Editing a Property

The upper **General** section of the **Common Settings** tab, contains information about the selected property. If the property is **defined in code**, information about this will be displayed, and values such as property type and presentation control cannot be changed. Other settings such as making the property mandatory or searchable, can be changed. The lower **User Interface** part contains settings related to the property display in Edit mode.

Refer to **Adding a Property** below for more information about available settings for properties.



Adding a Property

1. Select the page type where the property is to be added on the **Page Type** tab in admin mode and click **Add Property**.
2. Select a property type in the **Type** field. There are a number of different property types to choose from: integer, string, page, date, etc. It is also possible to create your own property types.
3. Enter a name in the **Name** field. This is used when programming and making language settings.
4. If your website is configured to allow multiple editors and you chose the property type ”XHTML String (>255)”, the **Presentation control** drop-down list will be enabled and you can select the HTML editor you want to use. For more information about multiple-editor configuration, see the *Developer Guide in the EPiServer CMS SDK*.
5. Select whether you want a *default value for the property*.

6. Specify whether the field should be *unique for a certain language* if the website has activated support for globalization by selecting the **Unique value per language** check box.
7. Specify if the *field is compulsory* or not with the **Value must be entered** check box.
8. Specify whether the *fields are to be searchable* or not with the **Searchable property** check box.
9. Specify whether the *field is to be visible* in edit mode with the **Display in Edit mode** check box.
10. Specify a heading for the property in the **Field name** field. The text is displayed for the editor when using the page type, if the field is not language-encoded.
11. Specify help text in the **Help Text** field. The text is displayed for the editor when using the page type, if the field is not language-encoded.
12. Select the tab on which the property is to be displayed, in the **Tab** drop-down list.

Custom Settings Tab

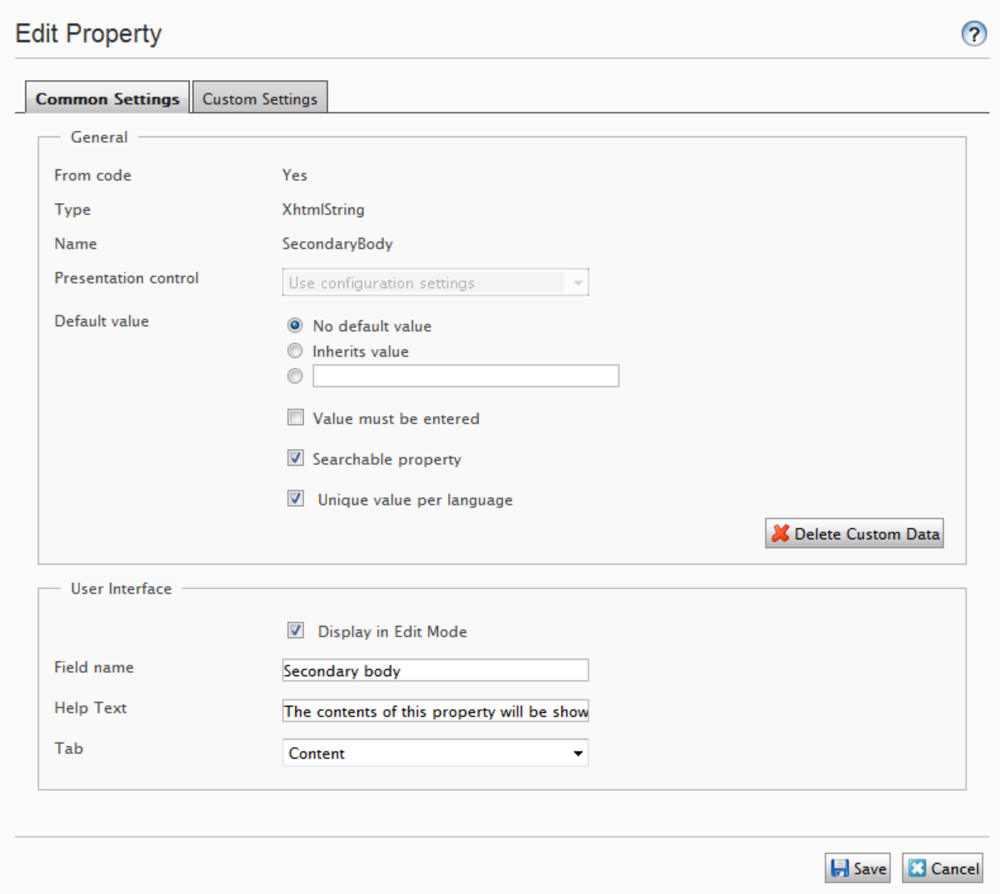
This tab displays custom information for the selected type of property. This is for instance used when you want to configure **available buttons in the HTML Editor**, which is based on the property type "XHTML string (>255)". Refer to the *Configuring the HTML Editor* section for more information.

Default Value of Field

The fields in which an editor enters information are called **properties**. Page types and blocks contain different properties with different functions. In EPiServer CMS, there are certain properties that create default fields on all templates and these cannot be removed. Sometimes it is helpful to provide default field values. It is possible to specify the default values on both the individual fields and the default fields.

Select the default values for a specific property

1. Select the page type where the property is, on the **Page Type** tab.



2. Click the name of the property that you wish to modify.
3. In the **Default value** section you can choose not to specify default values, for it to inherit values or to specify a custom value.
4. Click **Save**.

Mandatory Fields

It is possible to make fields mandatory so that editors must fill them in before saving the page. The setting is configured per property and page type. Editors that save a page without filling in the mandatory fields will receive a warning that the page cannot be saved until a certain field has been filled in.

Set mandatory fields

1. Select the page type that includes the property that you wish to enforce on the **Page Type** tab.
2. Click the name of the property that you wish to modify.
3. Select the **Value must be entered** check box.
4. Click **Save**.

Field Searchability

In EPiServer CMS there is a function for searching the website content. The search does not need to be carried out in all fields and it may be of benefit to remove certain fields from the search so that the search engine does not give hits on things that may not affect the content on the page, for example, the Author field. As default, all the fields are searchable.

This only affects the EPiServer CMS search engine.

Exclude a certain field from the search as follows:

1. Select the page type where the property to be searched is, on the **Page Type** tab.
2. Click the name of the property that you wish to modify.
3. Clear the **Searchable property** check box.
4. Click **Save**.

Hiding Fields in Edit Mode

You can hide fields in edit mode so that editors cannot change the value that is saved for the property. The setting is configured per property and page type. As default, all the fields are visible in edit mode.

Hide a field in edit mode as follows:

1. On the **Page Type** tab, select the page type and locate the property you want to hide.
2. Click the name of the property and clear the **Display in Edit Mode** check box.
3. Click **Save**.

Configuring the HTML Editor

The editor in EPiServer CMS is configured on the **Page Type** tab, by selecting a page type and either adding or updating a property of the type ”XHTML String (>255)”.

Properties based on property type ”XHTML String (>255)” will result in an HTML editor, which can be configured so that you can choose which buttons will be available. The editor in a standard installation of EPiServer CMS, is a customized version of the open source editor **TinyMCE**. This editor has many functions, is easy for developers to customize and supports all the browsers supported by EPiServer CMS.

The documentation for EPiServer CMS describes the integrated TinyMCE editor as it appears in a standard installation, with a selection of functions being available. There are however additional functions, which can be incorporated into the editor from admin mode. Refer to the official *TinyMCE website* for further information about these functions.

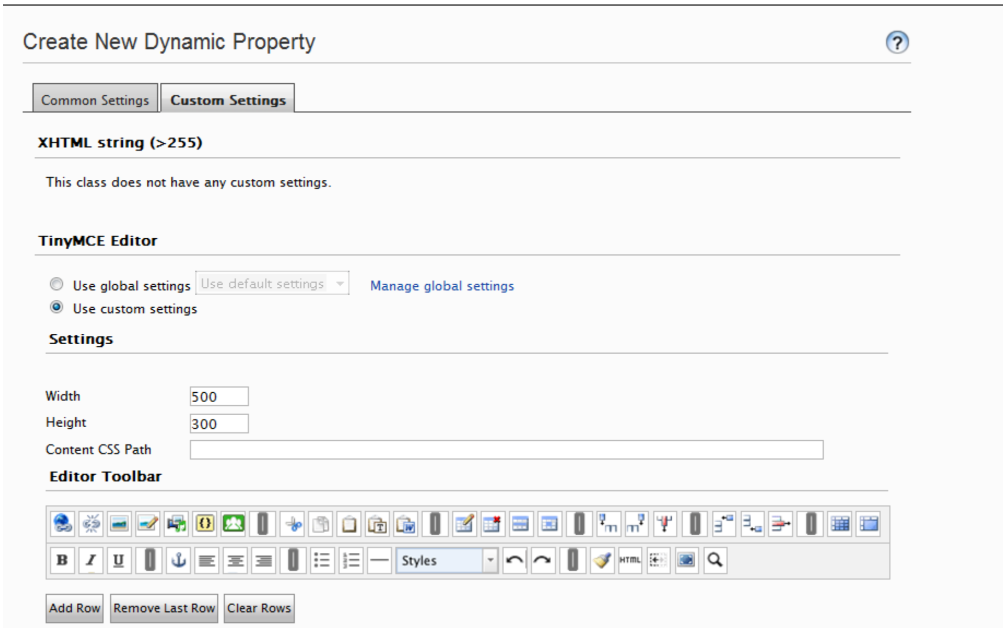
The editor can easily be adapted to suit different groups of editors making different buttons available depending on the functionality required. It is also possible to change the size of the editor dialog. To change the settings of the Editor, you must firstly have configured the property to use property type ”XHTML String (>255)”. This will enable the fields in the **Custom Settings** tab.

There are two kinds of settings used to change the layout and buttons available in the editor: *global settings* and *custom settings*. The layout of the editor toolbar is configured in the same way regardless of the type of setting.

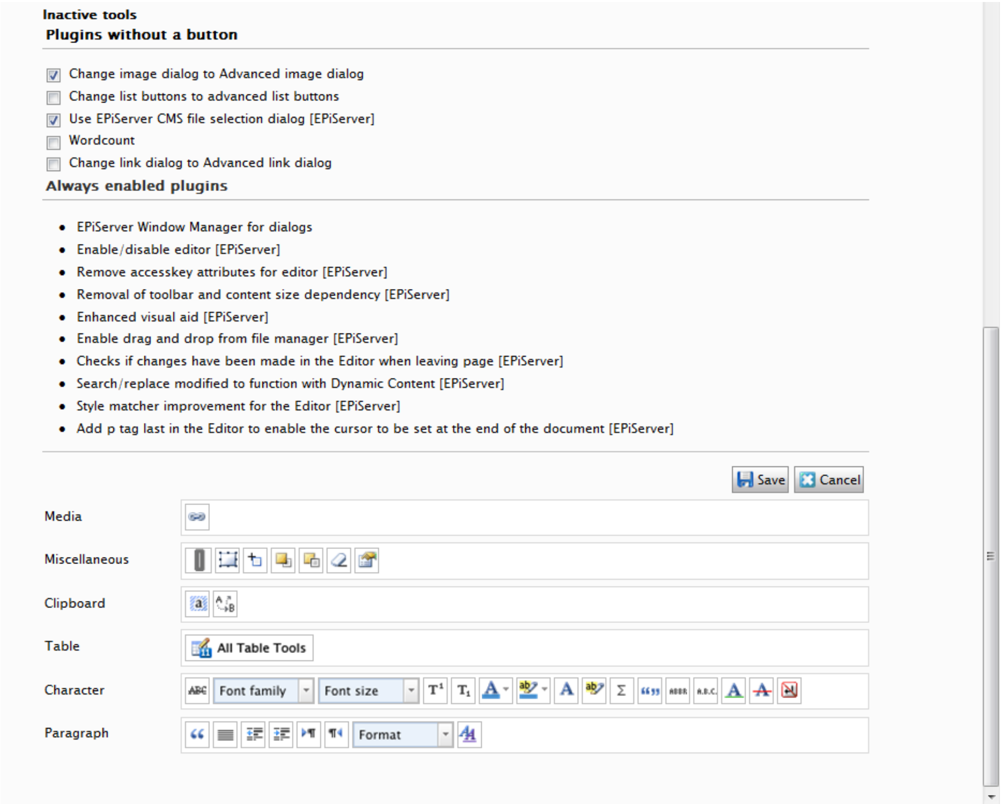
Change the Layout of the Editor

1. Enter the required width and height of the editor (in pixels) in the **Height** and **Width** fields.
2. The **Content CSS Path** field contains the path to the cascading style sheet that is to be used in the editor.
3. Configure the layout of the editor by dragging and dropping the icons that you want to be available from the editor toolbar designer to and from the **Inactive tools** section.
4. Remove an icon by dragging it from the toolbar designer and dropping it in the **Inactive tools** section. The icon will automatically be placed in the category to which it belongs.

5. Add an icon to the editor by dragging it from the **Inactive tools** section to the desired position in the toolbar designer.
6. Add and remove rows from the editor by clicking **Add Row** and **Remove Last Row**. The easiest way to clear all the icons from the toolbar designer and start from scratch is by clicking **Clear Rows**.
7. *Configure the plug-ins* to be used in the editor and click **Save**.



In the lower part of the **Create New/Edit Property** dialog, you can chose whether to use an advanced image or link dialog. You can also turn on the word count in the editor, and you can specify if you want to use the EPiServer CMS file selection dialog. By default the advanced image dialog is used as well as the EPiServer CMS file selection dialog.



Global Settings

Global settings are used to change the layout and the buttons in the editor toolbar for a property and can either be used on all page types as a default or on only one page type. You can have as many global settings as you like on your website, making it possible to create an editor suitable for all editors working with the website.

Configure a global setting for the XHTML String (>255) property

When you apply a global setting to all properties based on the XHTML String (>255) property type, all the editors on the website using a global setting will be based on this, unless stated that they should be based on another global setting or a custom setting.

1. On the **Page Type** tab, select **Edit Custom Property Types** and click **Add Setting**.
2. Enter a name for the global setting, generally a descriptive name so that you know what the global setting refers to.
3. *Change the layout of the editor*, *configure the plug-ins* and click **Save**.
4. The global setting appears in a list and you can select to set one of the settings as default by clicking **Set as Default**. This means that it will be used for all the Editor on the website unless another setting has been chosen for the property in a certain page type.

> If you do not configure a global setting as default, the properties will use the standard toolbar set at installation.

Configure global settings for a property on a page type

It is also possible to configure the global settings for a property on a page type so that one of the global settings is used, but only on this property and on this page type.

1. Open the page type for which you want to change the global settings on the **Page Type** tab in admin mode.
2. Click the property you want to configure and select the **Custom Settings** tab.
3. Select the **Use global settings** check box and select **Use default settings** if you want to use the default settings for the property.
4. Create a new global setting for the property by clicking **Manage global settings**. Add a global setting by following the instructions on how to Configure a global setting for the XHTML String (>255).
5. *Change the layout of the editor*, *configure the plug-ins* and click **Save**.
6. Change the global setting in the drop-down list. Click **Save**.

Delete a global setting

Delete a global setting by opening the setting and clicking **Delete**.

Custom Settings

Custom settings are used to change the layout and the buttons in the editor toolbar **for this property on this page type only**. Refer to the documentation for *global settings* if you wish to change the settings globally for the property.

Configure a custom setting as follows:

1. On the **Custom Settings** tab, select the **Use custom settings** radio button.
2. *Change the layout of the editor*, *configure the plug-ins* and click **Save**.
3. The custom setting will now be used for this property on this page type alone.

Editor Plug-ins

There are two kinds of plug-ins used to configure the editor toolbar: plug-ins without a button and plug-ins that are always enabled.

Plug-ins Without a Button

The plug-ins that do not have a button enable functionality in the editor that is not triggered by a toolbar button.

- **Change image dialog to Advanced image dialog** enables an advanced Add/Edit Image dialog box. Select this check box to make it possible to configure advanced properties for your images.
- **Change link dialog to Advanced link dialog** enables an advanced link dialog box.
- **Wordcount** enables the word count functionality. Select this check box to add a **Words** field to the bottom right of the editor. This displays the amount of words included in the editor.
- **Use EPiServer CMS file selection dialog**

Always Enabled Plug-ins

There are some editor plug-ins that are always enabled in a standard installation of EPiServer CMS. These are configured in the Plug-in Manager on the **Config** tab in admin mode. The following plug-ins are always enabled in a standard installation of EPiServer CMS.

- Enhanced visual aid
- Search/replace modified to function with dynamic content
- Automatic resize of dialogs
- Remove access key attributed for editor

- Enable/disable editor
- Checks if changes have been made in the editor when leaving page
- Enable drag and drop from the File Manager
- Removal of toolbar and content size dependency

Inactive Editor Buttons

The buttons listed below are inactivated in the standard toolbar, but can easily be activated by adding them to the toolbar in admin mode, see *Configuring the HTML Editor*.

- **Abbreviation**.
- **Acronym**.
- **Align full**. After marking a text and pressing this button, the entire paragraph will be stretched over the full page.
- **Citation**.
- **Deletion**.
- **Direction left to right**. Changes the text direction to “left to right”.
- **Direction right to left**. Changes the text direction to “right to left”.
- **Edit CSS Style**.
- **Font family (drop-down)**. Change the font family of the marked text using styles.
- **Font size (drop-down)**. Change the font size of the marked text.
- **Indent**. Indents the marked text using style attribute.
- **Insert column after**. Functionality for inserting a new column after the current table column in the editor.
- **Insert column before**. Functionality for inserting a new column before the current table column in the editor.
- **Insert custom character**. Functionality for inserting custom characters/symbols.
- **Insert new layer**.
- **Insert row after**. Functionality for inserting a new row after the current table row in the editor.
- **Insert row before**. Functionality for inserting a new row after the current table row in the editor.
- **Insert/edit attribute**
- **Insert/edit image (simple)**. When this button is clicked and the advanced image dialog is not checked we get a simple image dialog.
- **Insert/edit link (Simple)**. With the advanced link dialog cleared this will show the simple link dialog where you can enter a URL, target and title for the link.
- **Insert/edit link (Advanced)**. With the advanced link dialog checked this will show the advanced link dialog where you can enter a URL and title for the link.
- **Insertion**. Opens a insertion dialog, for setting properties for the <ins> tag that makes a text as inserted.
- **Inserts a new table (table)**. Inserts a new table in the editor. The dialog that opens makes it possible to change the appearance and layout of the table.
- **Merge table cells**. Opens a dialog for merging table cells. Cells with be merged within the number of cells/rows specified from the origin of the selected table cell.
- **Move backward**.
- **Move forward**.

- **Outdent**. Outdent the selected element using style attribute.
- **Remove column**. Remove the column the current column from the table.
- **Remove formatting**. Removes any formatting of the selected element.
- **Find/Replace**.
- **Select All**. Selects all content in the editor.
- **Select background color**. Selection of the background color of the element.
- **Select text color**. Selection of the text color of the element.
- **Split merged table cells**. Splits table cells that have previously been merged by the merge functionality.
- **Strikethrough**. Sets a strikethrough style on the marked element.
- **Subscript**. Makes the market text into subscript.
- **Superscript**. Makes the market text into superscript.
- **Table cell properties**. Button that opens the properties dialog for a table cell.
- **Table row properties**. Button that opens a dialog for setting properties for table row.
- **Toggle absolute positioning**. Toggles absolute positioning for a layer.
- **Underline**. Underlines the selected text using a span with style attribute set to text-decoration:underline.
- **Unlink**. Removes any links within the selection.
- **Unordered list**. Inserts an unordered at the current selection.
- **Word count**.

Page Types

Page types contain the *properties* (fields) where editors enter information. To display the content of a page, the page type and its properties need to be mapped to **page templates**. Page templates can be aspx files with associated code files, containing functionality required to perform a specific function and to display the content in View mode.

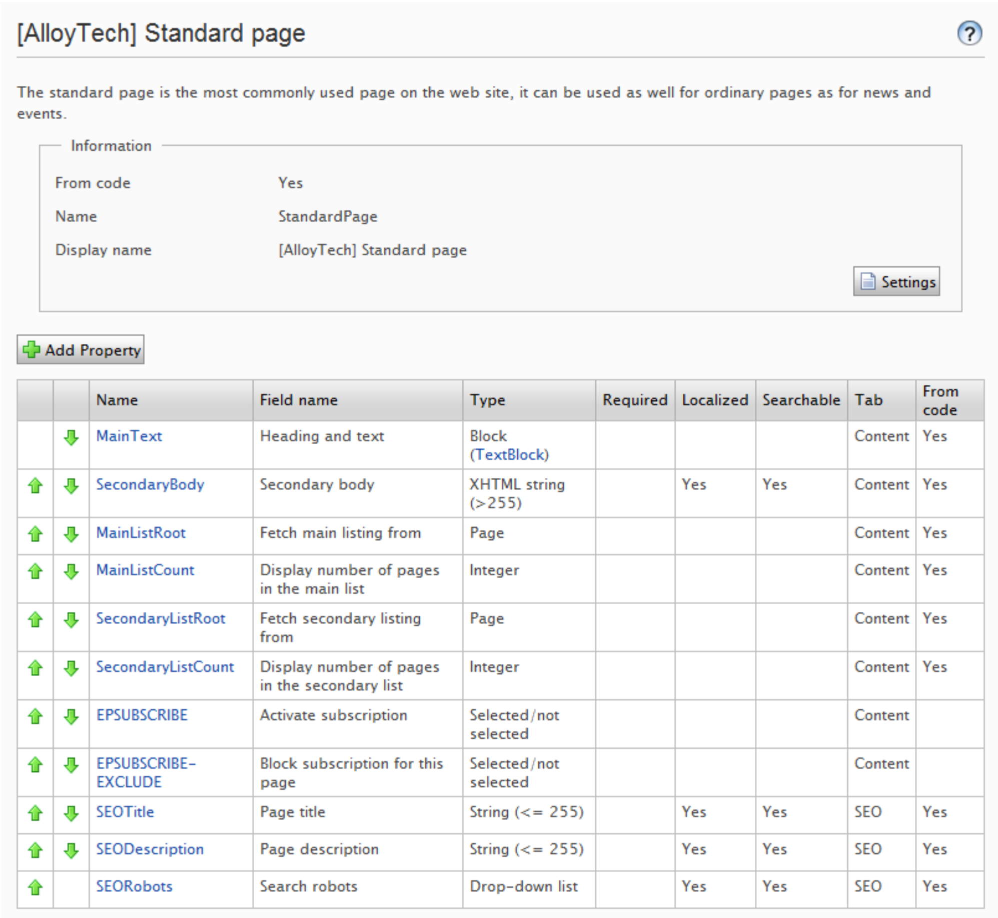
Page templates can be associated with one or many page types. This also means that a page and block types can have multiple templates associated to them. Page templates are associated with page types by inheritance. Page types can be defined either in code or from the admin mode.

For certain page types that are defined in code it is possible to do "non-breaking" changes in admin mode. The administrator can select a default template and this will override any default settings. If the settings defined in code **cannot** be changed in admin mode, information about this will be displayed. If you do changes to a page type defined in code, it is possible to reset the changes to the original values defined in code.

When selecting an available page type under **Page Types**, information about the page type will be displayed, as well as the properties for that page type. You can for instance see whether the property is from code and if it is localized.

You have the following options:

- Change the **display order** for the properties in edit mode, refer to *Organizing Properties in Page and Block Types*.
- **Edit the settings for properties** on the page type, refer to *Editing and Adding Properties*.
- **Add properties** to the page type, refer to *Editing and Adding Properties*.
- **View and edit settings for the page type**, refer to *Editing and Creating Page Types*.



[AlloyTech] Standard page

The standard page is the most commonly used page on the web site, it can be used as well for ordinary pages as for news and events.

Information

From code	Yes
Name	StandardPage
Display name	[AlloyTech] Standard page

Settings

Add Property

		Name	Field name	Type	Required	Localized	Searchable	Tab	From code
		MainText	Heading and text	Block (TextBlock)				Content	Yes
		SecondaryBody	Secondary body	XHTML string (>255)		Yes	Yes	Content	Yes
		MainListRoot	Fetch main listing from	Page				Content	Yes
		MainListCount	Display number of pages in the main list	Integer				Content	Yes
		SecondaryListRoot	Fetch secondary listing from	Page				Content	Yes
		SecondaryListCount	Display number of pages in the secondary list	Integer				Content	Yes
		EPSUBSCRIBE	Activate subscription	Selected/not selected				Content	
		EPSUBSCRIBE-EXCLUDE	Block subscription for this page	Selected/not selected				Content	
		SEOTitle	Page title	String (<= 255)		Yes	Yes	SEO	Yes
		SEODescription	Page description	String (<= 255)		Yes	Yes	SEO	Yes
		SEORobots	Search robots	Drop-down list		Yes	Yes	SEO	Yes

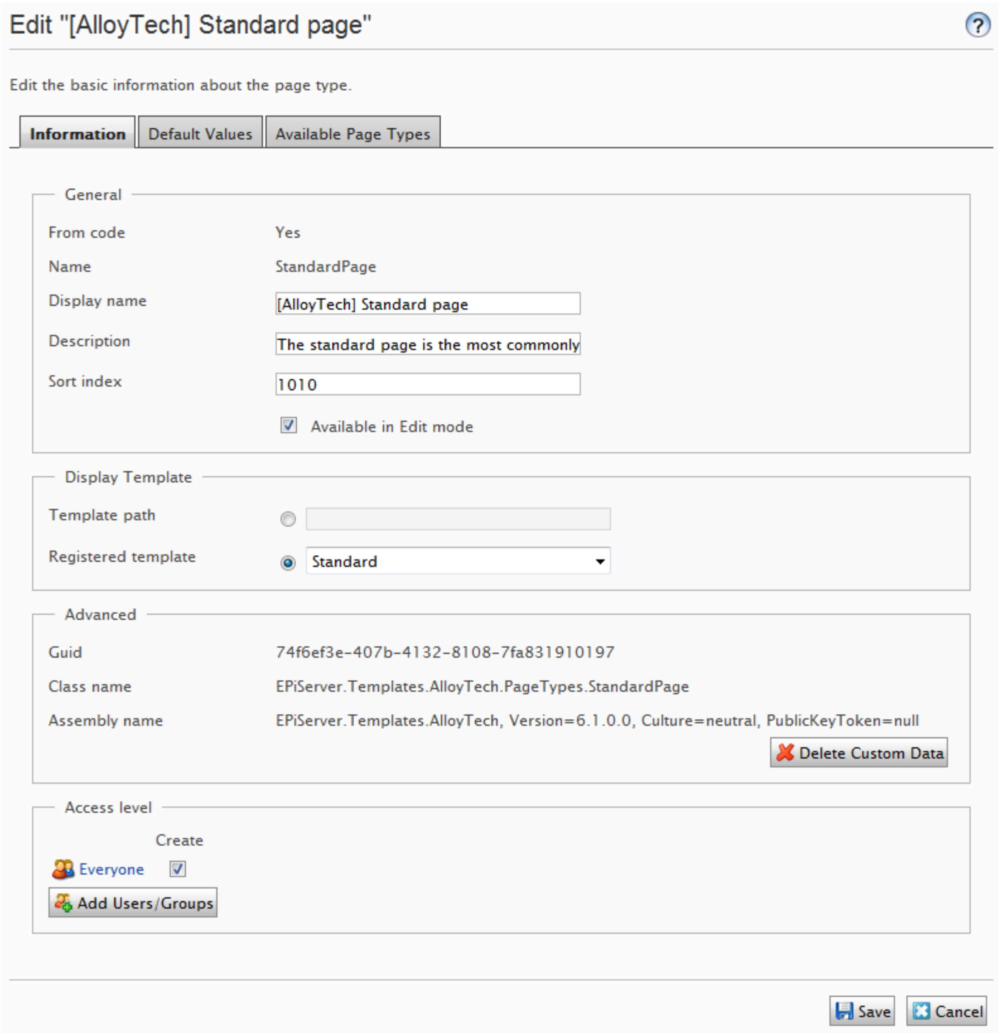
Certain page types that are defined in code cannot be deleted. This is typically page types upon which other page types are based, such as the standard or default page and the start page.

Be careful when altering page type settings since some changes may cause the website to stop working!

For related information, see also the *Properties* and *Block Types* sections in this documentation.

Editing and Creating Page Types

Since page types and their properties can be defined either in **code** or from the admin mode, this also means that certain settings may not be possible to change from admin mode. If a page type is created from code, this will be shown on the page type information page under **General**.



Editing Page Types

To edit the settings for an existing page type, open the page type in question on the **Page Type** tab, click **Settings** , change the settings according to your requirements and click **Save**. Refer to Creating Page Types for more information about available settings for page types

Creating Page Types

Page types can be created from scratch ore copied from an existing page type, see *Copy Page Types*. Do the following to create a new empty page type:

1. On the **Page Type** tab, select **Create New Page Type**.
2. Enter information in the information fields for the page type, see description below.
3. Click **Save**.

Information Tab

Name

The page type’s name is entered here.

Display name

The name that will be displayed to editors in the list of available page types.

Description

The text describing the page type, will be displayed to editors in the list of available page types.

Sort index

Determines the sorting (ascending sort order) in the list of available page types in **Edit** mode, the default value is 100.

Available in edit mode

When checked, this option will make the page type available for selection when creating new pages in edit mode. It is recommended to hide page types that are rarely used by editors, for instance the Start Page page type. These can made available when needed, and then hidden again.

Template path

Check this option to enter a path to the .aspx page template file to be used to display the content of the page.

Registered template

This option is useful when you want to use registered page templates for displaying content. The registered page templates will be available for selection in the drop-down list. A page type can then be associated with predefined page templates to display the same content using different channels.

Advanced information

Displays information about the GUID and Class and Assembly names for the page type.

Access level

Determines the users and user groups for which the page type will be available when creating new pages. The default setting is "Everyone", meaning that it will be available to all users and groups.
Do the following to limit access rights for a page type:

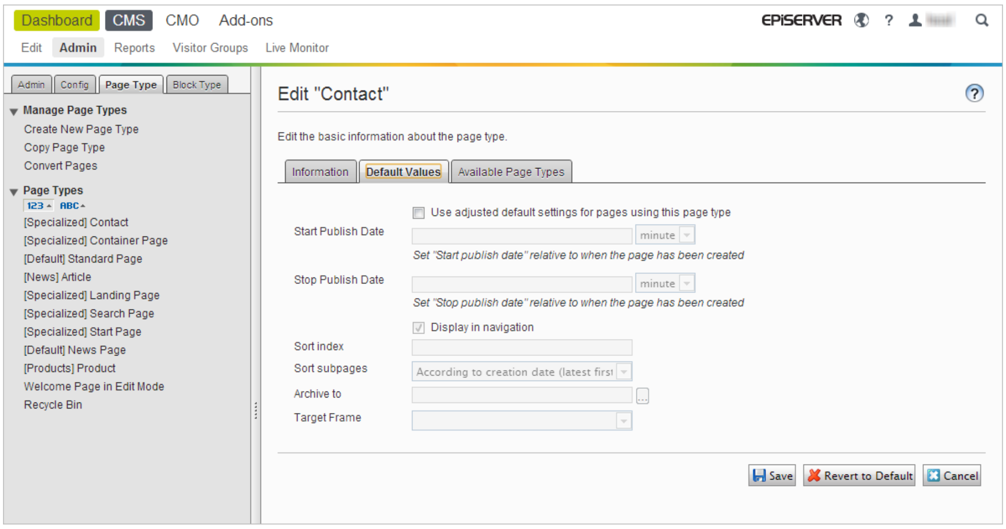
1. Click the **Create** checkbox to clear the access level setting for "Everyone".
2. Click **Add users/Groups** and select the relevant users or groups., click **OK** when done.
3. Make sure that the **Create** check box is selected for the desired users and groups and click **Save**.

Default Values Tab

It is possible set default values for some of the standard properties in EPiServer CMS. You can for instance define that a news item page should never be displayed in menus. This is done by deselecting the "Display page in menus" property, which will then be the default value for this page type.

Change the default values of EPiServer CMS properties

1. Select the page type for which you want to specify default values on the **Page Type** tab.
2. Click **Settings** and then the **Default Values** tab.
3. Specify the default values for the desired properties.
4. Click **Save**.



Available Page Types Tab

When creating new pages it is recommended to limit the available page types in the page type list, in order to make it easier for editors to chose the correct page type. For a "News List" parent page, you can for instance define that the only available page type should be "News Item".

Define available page types

1. On the **Page Type** tab, select the page type for which you want to define underlying page types.
2. Click **Settings** and then the **Available Page Types** tab.
3. Define the desired page type options, see description below.
4. Click **Save**.

Options for available page types:

- **Clear Custom Settings** - revert to default settings defined in code for this page type.
- **All** - possible to create pages based on all page types available in edit mode.
- **None** - not possible to create child pages for this page type.
- **Selected** - pages can be created based on a selection of page types (select these pages).

Page Type List Sorting in Admin Mode

The list of available page types can be sorted according to either sort index or alphabetical sort order. Click "123" under the **Page Types** heading to sort according to sort index, or "ABC" to sort alphabetically. This does not affect the page type list in edit mode.

Copy Page Types

To make it easier to create a new page type, it is common practice to copy an existing page type instead of starting from scratch every time. When you copy a page type, all of the properties are also copied, so you don't need to create them again. You can then edit the information for the page type and its properties.

Copy a page type

1. Select **Copy Page Type** in the **Page Type** tab in admin mode.
2. Select the page type that you want to copy from the drop-down list and click **Copy**.

3. A window will appear containing the exact same properties and you can then edit the page type information to suit your requirements and click **Save**,

You can create a container page type in the same way as other page types without defining a file name.

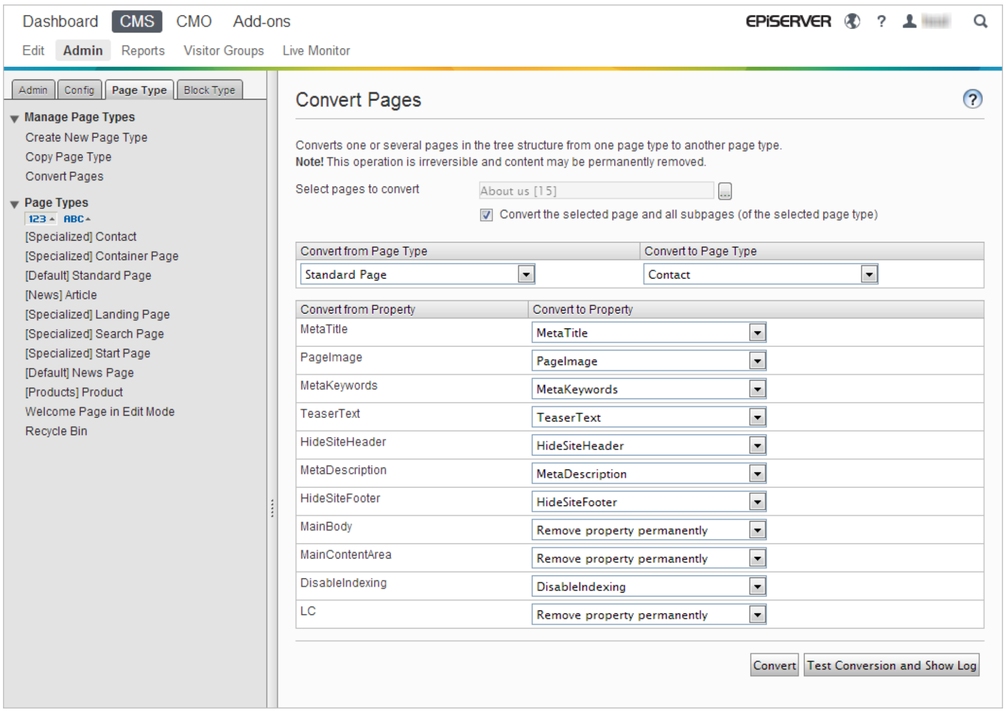
Convert Pages

It is possible to convert one or several pages in the tree structure from one page type to another. This may be useful, for example, if you have built up a page structure with all pages based on the page type **Standard page** and you then decide that you would like to use the information on the pages as news items, based on the News item page type.

Each page type contains a number of properties which generate the fields in the page type. When you convert a page, you convert the content in the page properties of the old page type to the corresponding properties in the new page type.

> At conversion, all versions of a page are converted, not just the published version. Before starting the conversion, make sure that no users are working with the page types to be converted.

1. Select **Convert Pages** from the **Page Type** tab in admin mode.



2. Select a page to be converted in the **Select pages to convert** field and select the **Convert the selected page and all subpages (of the selected page type)** check box if you want all the subpages to be included in the conversion.
3. Select the page type that you want to convert from in the **Convert from Page Type** list. When you select a page type to convert from, the list of page properties included in that page type will be updated in the **Convert from Property** list.

4. Select the page type that you want to convert to in the **Convert to Page Type** list. When you select a page type to convert to, the list of page properties included in that page type will be updated in the **Convert to Property** list.
5. Map each page property in the page type that you want to convert to a page property in the page type to which you want to convert the pages.
6. When you have filled in all the properties to be converted, click **Convert**. If you would prefer to first test the conversion first, click **Test Conversion and Show Log**. This will display a detailed log of the pages and page properties to be converted.

Note that a page property in the “new” page type can only be mapped to one “old” page property.

If you select **Remove property permanently**, the page property and its content will not be converted, instead it will be deleted, which may damage content on the website.

Container Pages

Containers are pages that can be used to store and edit data on the web page. It is possible to use the data through developer APIs, the fetch data functionality as well as dynamic content page properties. Containers are not displayed to visitors and can therefore only be edited in the editorial interface.

Container pages have the following limitations:

- Have no preview
- Are not searchable, since they are filtered from page searches
- Do not have a target frame or simple address
- Are not visible in menus
- Cannot be linked to
- Cannot be compared visually or side by side

You can create a container page type in the same way as other page types without defining a file name.

Block Types

Block types are similar to *page types*. A block consists of a collection of properties, for example, a heading and a text editor. To display the content of a block, it needs to be mapped to a display page template. Page templates can be aspx files with associated code files, containing functionality required to perform a specific function and to display the content to visitors. Block types can have multiple templates associated with them.

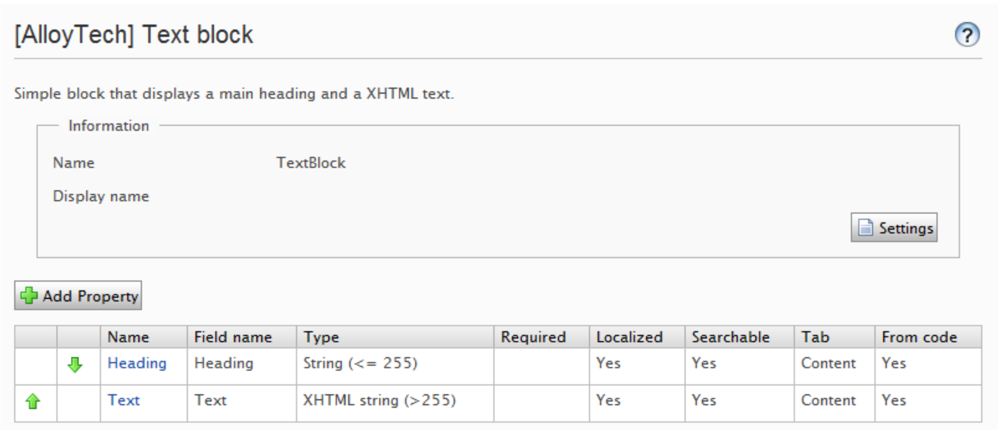
Block types are created in **code** and cannot be created from admin mode like page types.

It is possible to do “non-breaking” changes to block types in admin mode. If settings for a block type is defined in code and **cannot** be changed in admin mode, information about this will be displayed. If you do changes to a block type, it is possible to reset the changes to the original values defined in code.

When selecting an available block type under **Block Type**, information about the block type will be displayed, as well as the properties for that block type. You can for instance see which properties are localized.

From this view you can:

- Change the **display order** for the block type properties in edit mode, refer to *Organizing Properties in Page and Block Types*.
- **Edit the settings for properties** on the block type, refer to *Editing and Adding Properties*.
- **Add properties** to the block type, refer to *Editing and Adding Properties*.
- **View and edit settings for the block type**, refer to *Editing Block Types*.



For related information, see also the *Properties* and *Page Types* sections in this documentation.

Editing Block Types

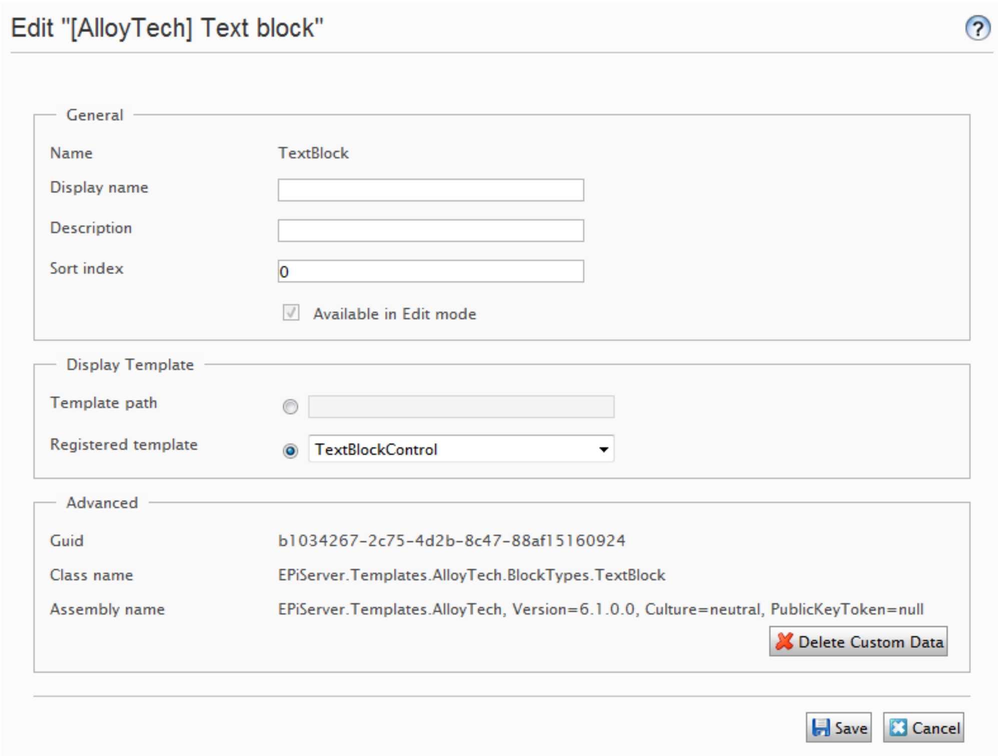
To edit the settings for an existing block type, open it on the **Block Type** tab and click **Settings**.

Some block type settings are defined in code and cannot be changed from admin mode.

Change one or several of the following settings and click **Save**:

Name	The name of the block type.

Display name	The name that will be displayed in the list of available block types.
Description	The text describing the block type, will be displayed in the list of available block types.
Sort index	Determines the sorting (ascending sort order) in the list of available block types.
Available in Edit mode	When checked, this option will make the block type available for selection.
Template path	Check this option to enter a path to the aspx page template file to be used to display the content of the block.
Registered template	This option is useful when you want to use registered page templates for displaying block content. The registered page templates will be available for selection in the drop-down list. A block type can then be associated with predefined page templates to display the same content using different channels.
Advanced information	Displays information about the GUID and Class and Assembly names for the block type.



Administering Visitor Groups

EPiServer CMS has a feature called **Personalization**, which is a way to adapt the content on your website to particular groups of your audience, also called visitor groups. A visitor group is a virtual group. As an administrator you can design the visitor groups used for personalized content on your website. You can also provide access for editors to become members of **VisitorGroupAdmins** as described in *Working with Authorization*.

You define the expected audience on your site by dragging and dropping various criteria to a visitor group you are creating, for example, “Competitors”, “Potential customers”, “People from Sweden”, “Potential employees”. In EPiServer CMS a lot of the basic criteria are provided out-of-the-box, for example, a geographic location criteria, number of visits, referring search word, and more. But you can also develop your own criteria.

When creating a new visitor group the administrator selects one or more criteria and sets appropriate settings for them. Those criteria will be used to determine if a user visiting the website is a part of that visitor group or not.

For examples about how you can combine the criteria, see *Examples of Adding Visitor Groups*.

Creating Personalized Content Work Procedure

Create personalized content in the following steps:

1. The administrator creates visitor groups. Also the administrator can set up access rights for a visitor group to a page and its files.
2. The editor selects the content (such as text, images and dynamic content) on a web page to personalize and selects visitor group. Previews the personalized content, publishes or continues to work with the personalized content.
3. If statistics was enabled when the visitor group was being added, the editor can add the **Visitor Group Statistics** gadget to see how many visitors have visited a page with personalized content.

Available Visitor Group Criteria

In a standard installation the following set of criteria are available:

Site Criteria

- **Number of Visits** will match the number of times the visitor has visited the website.
- **User Profile** will match a value stored in a user’s profile. When adding this criterion you can specify that to be part of this group the user has to have a specific value for a specific profile setting. You can decide if the user profile property should match on equal, contain, start with, or end with a specified value.
- **Visited Category** lets you select one of the page categories on the website. You can also select how many different pages that use the specified category the visitors have visited. The visitor must have visited the specified number of pages that has the specified category set on it.
- **Visited Page** will let you select one specific page on the website. The visitor must have visited the specified page during the current session.

Time and Place Criteria

- **Geographic Coordinate** will look up the visitor's approximate location in a geolocation database (based on the visitor’s IP address). Drag the marker and drop it on the map (Google

Maps), and select a radius around that point to match the visitors location to the selected location.

- **Geographic Location** will look up the visitor's approximate location in a geolocation database (based on the visitor’s IP address) and match their location to the selected location. You can match the visitor to a specific continent, country and region. It is also possible to specify a wildcard for country and region.
- **Time of Day** will match the visitors time period with the start time, end time, and weekdays you have specified.

URL Criteria

- **Landing URL** will store the URL that the user enters the site with. You can decide if the landing URL should match on equal, contain, start with, or end with a specified value.
- **Referrer** will store the URL of the referred page that was clicked before entering the site, for example, a SERP. You can decide if the referrer criteria should match on equal, contain, start with, or end with a specified value for the whole URL or parts of it (for example, host name).
- **Search Keyword** will store the URL of the referred page that was clicked before entering the site, for example, a SERP. You need to specify the search word to match against the URL by a regular expression. The regular expression finds the search words in the URL from the most common search engines on the market, for example Google, Yahoo, and Bing.

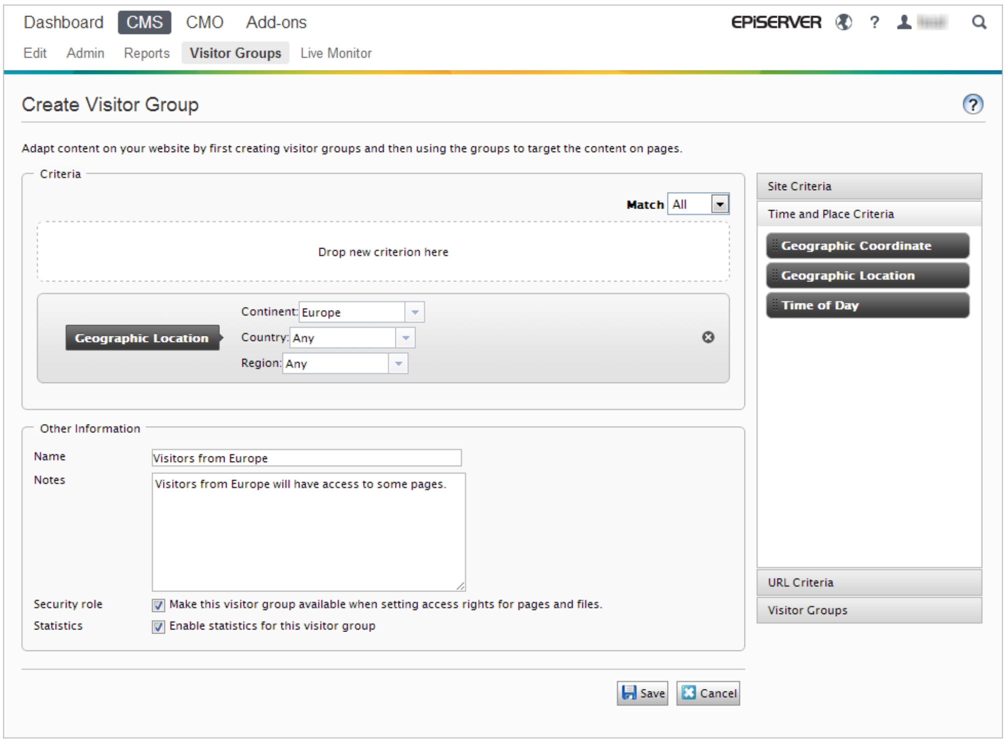
Visitor Groups

- **Visitor Group Membership** let you select members from one or several existing visitor groups.

Creating a Visitor Group

Add a visitor group to be available for personalized content as follows:

1. Log in to EPiServer CMS and select the **Visitor Groups** tab. Or, you can right-click and select **Visitor Groups** instead.
2. Click **Create**.

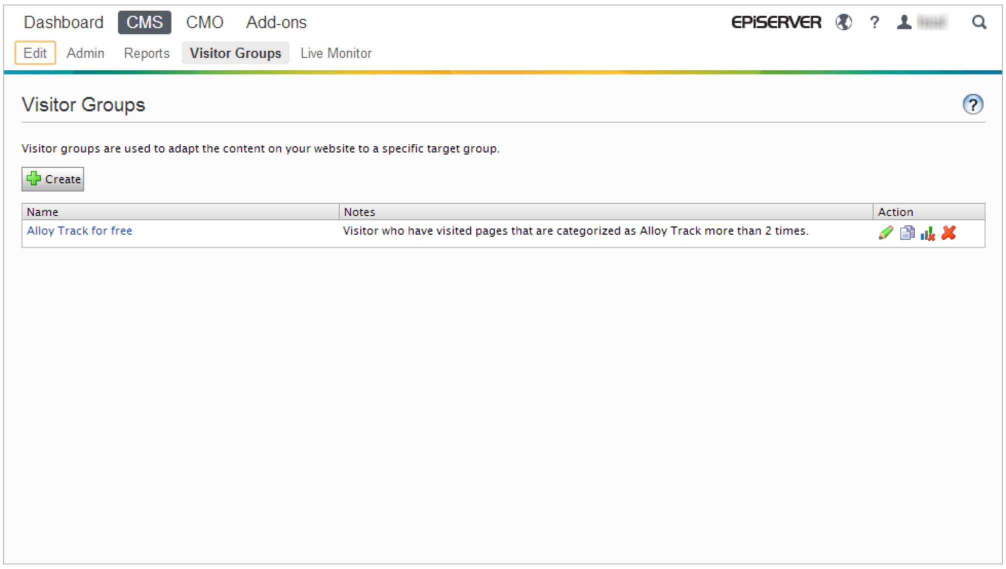


3. In the **Criteria** section, click to add one or several criteria for each visitor group as follows:
    a. In the **Match** drop-down list, select the criteria to match **All**, **Any** or **Point**. What you select here will affect all criteria for the visitor group. Using points is a way to set a value for what an desired action on the website is worth.
    b. Drag the criteria you want from the pane on the right and drop it into the **Drop new criterion here** area.
4. Make the settings for the criteria, see examples described in *Examples of Adding Visitor Groups*.
5. In **Name**, name the visitor group you have created. This name will be displayed in the personalized content box when you select the content on a page.
6. In **Notes**, type a descriptive text about the visitor group you have created, for example, its purpose. This description will be displayed as a tooltip when the editor is adding a visitor group to the content on a page.
7. In **Security Role**, select the check box if you want this visitor group to be available when setting access rights for pages and files in admin mode. Note that visitor groups will only have read access.
8. In **Statistics**, keep the check box selected to enable statistics for the visitor group (this check box is selected by default).
9. When you are done, click **Save**.

Changing a Visitor Group

Change a visitor group as follows:

1. Select the **Visitor Group** tab.



2. Click the **Edit** button for the visitor group you want to change.
3. Add new criteria for the visitor group by drag-and-drop, change the value for an existing criteria, or click to delete an existing criteria.
4. When you are done, click **Save**.

Note that if you change the name of a visitor group available in the list for access rights, the settings for this visitor group will no longer work.

Copying a Visitor Group

Copy a visitor group as follows:

1. Select the **Visitor Group** tab.
2. Click the **Copy** button for the visitor group you want to copy. The new copy will have the same name as the original but with the extension "- Copy".
3. Rename and change criteria for the new visitor group you have copied.

Deleting a Visitor Group

Delete a visitor group as follows:

1. Select the **Visitor Group** tab.
2. Click the **Delete** button for the visitor group you want to delete.
3. Confirm the deletion.

Clearing Statistics

The visitor group statistics are shown by a gadget in EPiServer OnlineCenter. Clear the statistics from the database as follows:

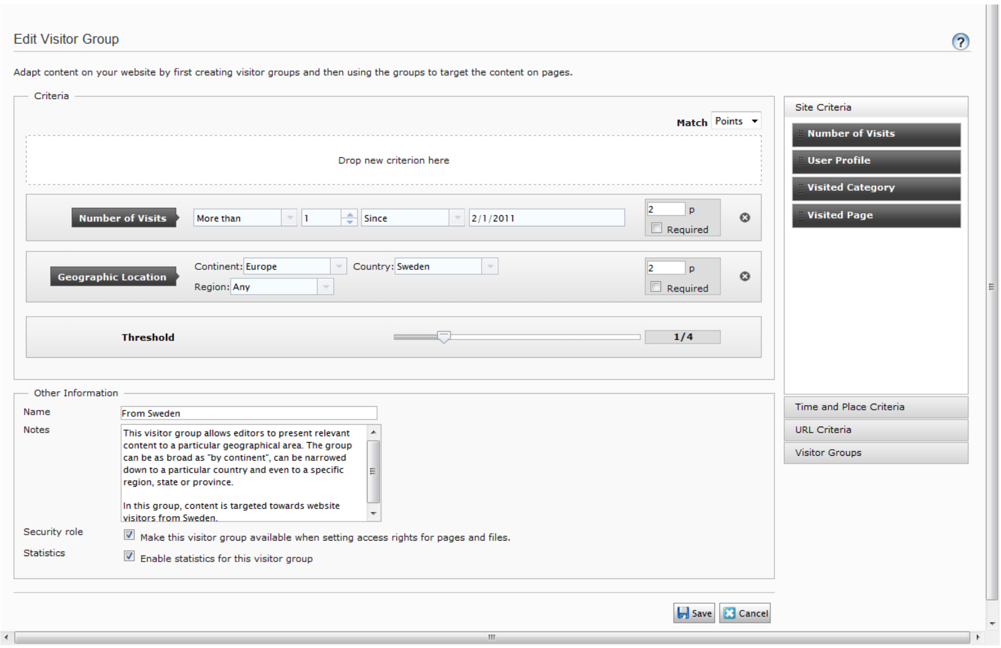
1. Select the **Visitor Group** tab.
2. Click the **Clear statistics** button.
3. Confirm the deletion.

Note that the clear statistics action takes effect immediately, and actually deletes it from the database. It cannot be undone.

Examples of Adding Visitor Groups

This section provides the following examples on how you can define the visitor groups by combining different criteria:

Points



By using **Points** you can set a value for how much an action is worth, for example, a visited campaign page. In this example, visitors who never has visited the page before will match the criteria for this visitor group.

1. In the **Match** drop-down list, select the criteria to match **Point**.
2. Drag and drop the **Visited Page** criteria, and select page. Use drag-and-drop of the criteria again to add several pages.
3. Drag and drop the **Number of Visits** criteria, and select **Equal** > **1** > **Since [Date]**.
4. Select **Threshold** for the criteria you have added in your visitor group, for example, that the visitor must fulfill 1 of 3 criteria to be included in the visitor group.
5. Save the visitor group.

Geographic Location

You can direct your content to visitors from a specific country and specific days, for example, "People from Sweden" visiting your website weekends. For example, you can show all Swedish people a clickable banner to sign up for a conference.

1. Drag and drop the **Geographic Location** criteria, and select **Continent**, **Country** and/or **Region**. Use drag-and-drop of the criteria again to add several countries.
2. Drag and drop the **Time of Day** criteria, and select **[Weekday]**. You can also select the personalization to start and end at a specific time.
3. Save the visitor group.

Geographic Coordinate

You can direct your content to visitors from a specific part in the city, for example, "People from Upplandsgatan, Stockholm".

1. Drag and drop the **Geographic Coordinate** criteria, and click **Select Location**.
2. Select location by clicking the map you want to include in the geographic coordinate and click **OK**.

3. Select the **Radius [Number of Kilometers or Miles]**.
4. Save the visitor group.

Referrer

The HTTP Referrers is based on pages, for example, used in a campaign. If the visitors search on "episerver cms" on Google.com and come to the website from the SERP, for example, http://www.google.se/#hl=sv&source=hp&biw=1338&bih=790&q=episerver+cms&aq=f&aqi=g10&aql=&oq=&gs_rfai=&fp=c37e43602e02c461.

Visitors searching "episerver cms", clicking a link to EPiServer's website through the search engine result page on Google.com.

1. Drag and drop the **Referrer** criteria, and select **URL** > **Equals** > [SERP, for example, http://www.google.se/#hl]
2. Save the visitor group.