EPiSERVER 7

CMS

User Guide

Editors, Version 7.1

User Guide for Editors – 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:

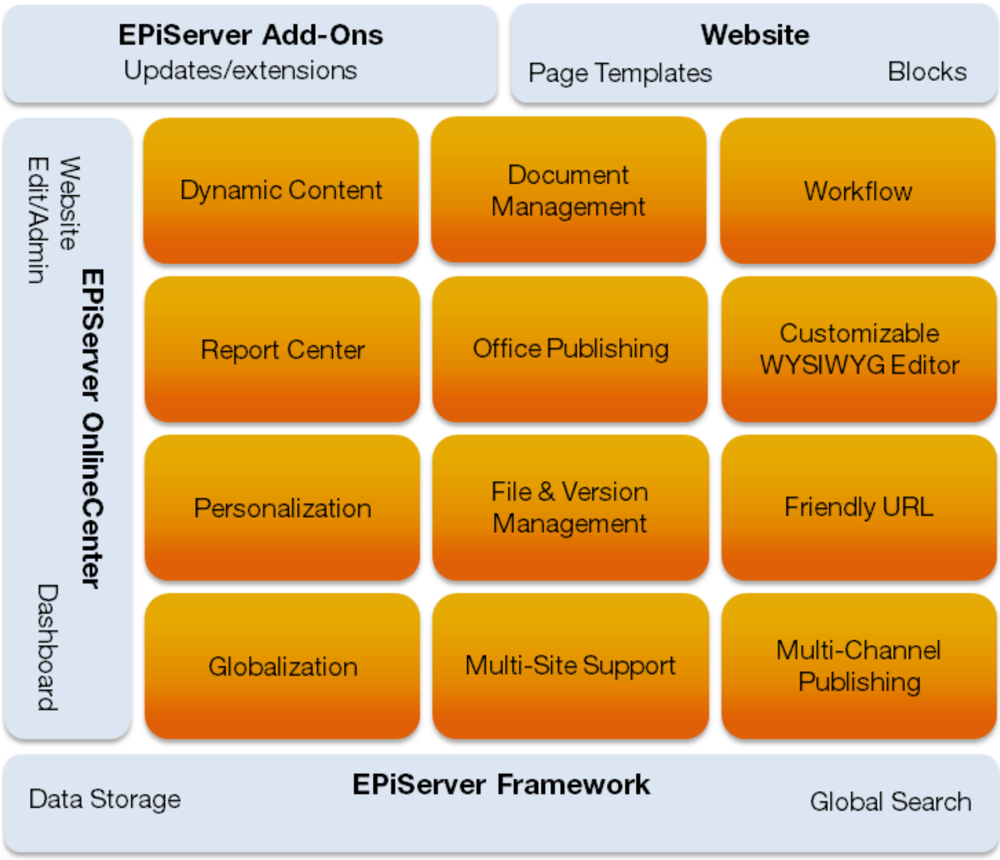
Cookie Name	Purpose
ASP.NET_SessionId	Session cookie sent to the web browser. Used when you open the browser and then go to a website that implements ASP.NET session state. This cookie is deleted when you close your browser.
EPi:NumberOfVisits	Used if you are using the **Number of Visits** personalization 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.

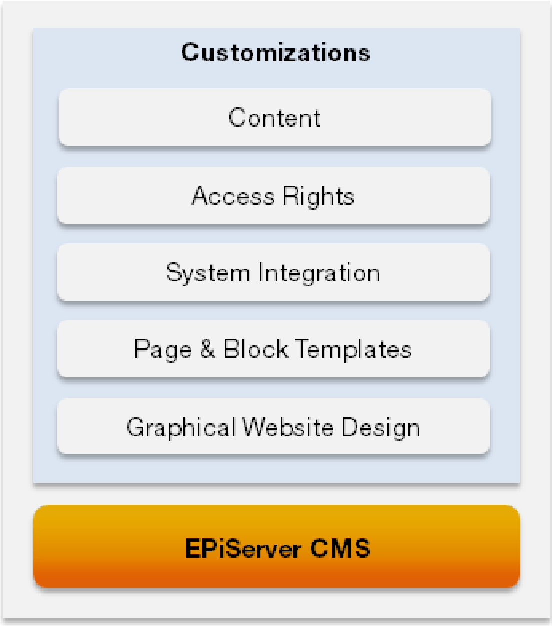
The EPiServer CMS Platform

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.

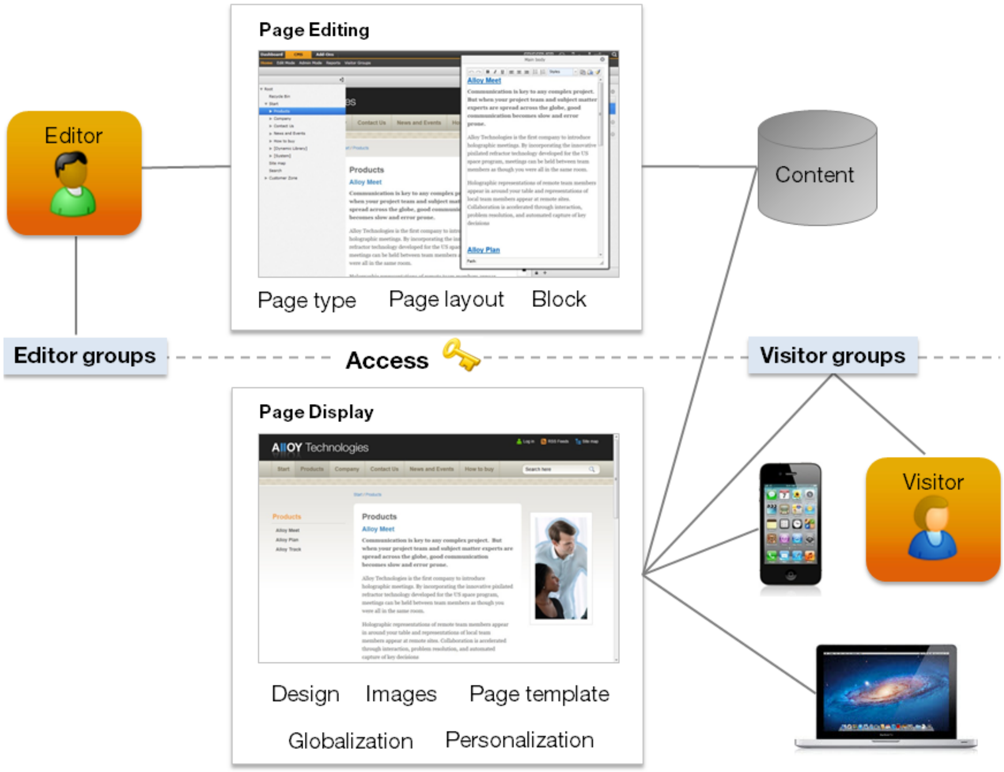
Roles

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.

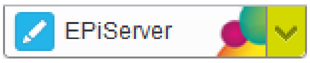
Getting Started

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

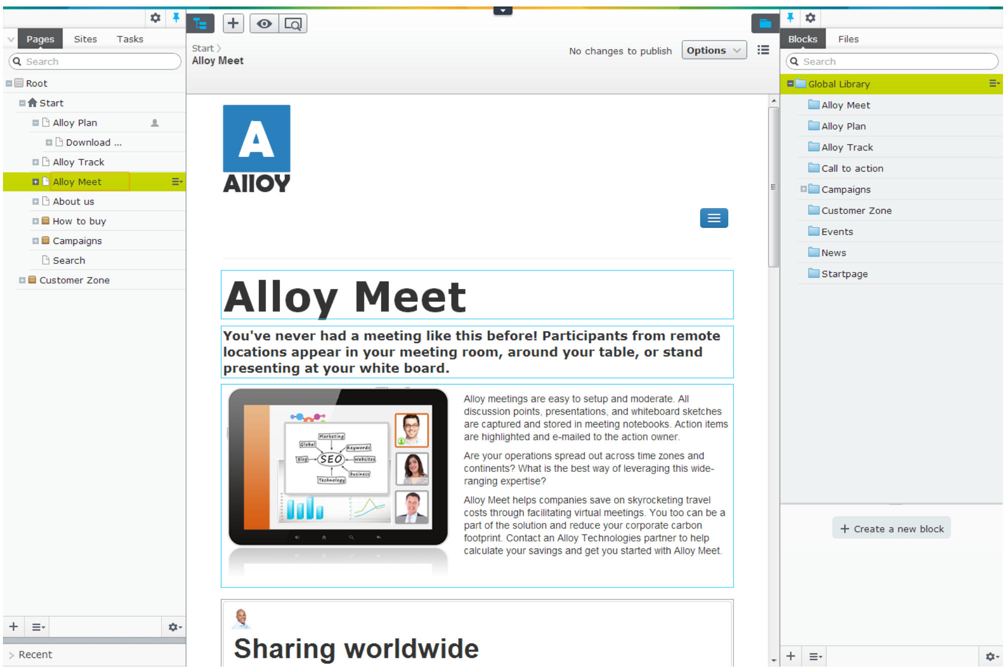
Access EPiServer as follows:

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.

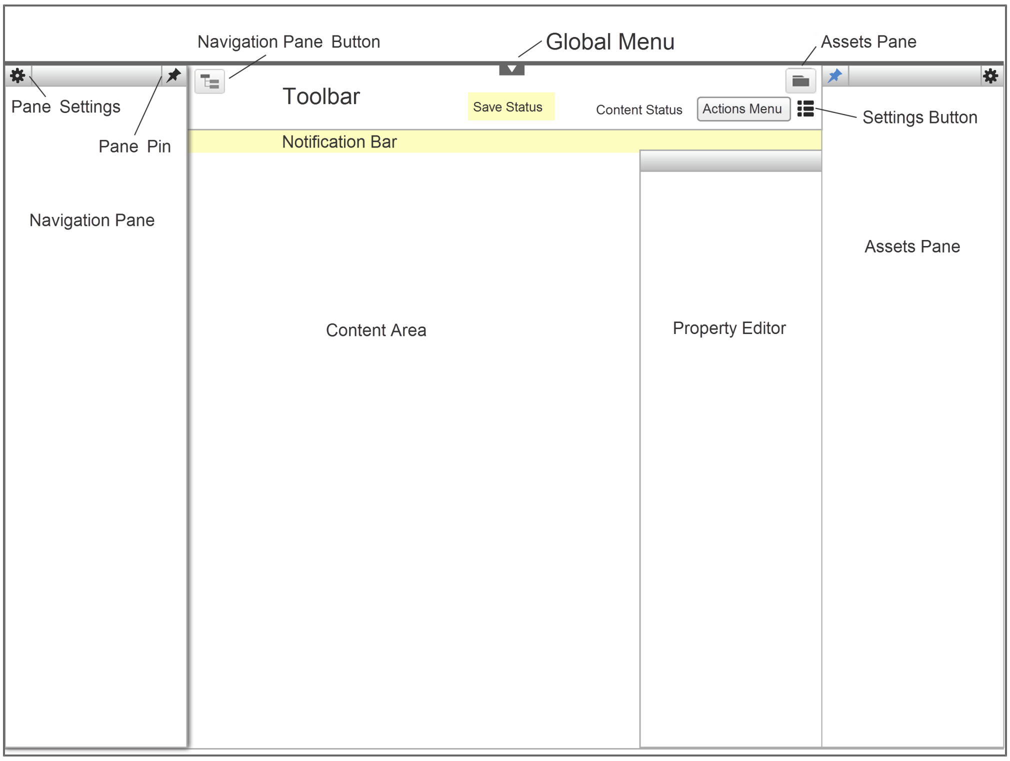
To the right is a link to **My Settings**, where you can select your personal system settings in EPiServer CMS. Under **?** there is also links to web help, license agreement and to log out from the website.

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

Generic Functions, Toolbar and Panes

The user interface of EPiServer CMS is highly customizable. Using the toolbar and the panes gives you access to the relevant functions when working with the content and its structure. Some buttons can be unavailable in your installation, which means either that you are not authorized to use them or that they has not yet been activated.

The image below shows the user interface parts and their names used in this documentation.



From **Edit** you can access the following areas in a standard installation:

- **Toolbar** on the top contains the available tools for editing the content depending on which context you are working in.
- **Navigation Pane** to the left shows the pages of the website as a tree structure, see *Structuring the Website*.
- **Content Area** in the middle shows the current page. It can also be a specific area on a web page for adding content through drag-and-drop operations.
- **Assets Pane** to the right contains blocks, files and other tools for customization.

Generic Functions

The following functions are commonly used in EPiServer CMS:

- **Context-sensitive actions**. When you select an action, you will only have access to the relevant actions in a context, for example, when editing a page. In addition, some options are only available if you have access rights, for example, publishing or removing content.
- **Primary actions**. Some actions are opened in a new window, for example, editing a page. The background appears dimmed, which means that you first must finish the action before you can continue. Another example is the publishing flow, where the bright color of the publishing button shows that it is the primary action.
- **Content path as breadcrumbs**. When you select a page, you can see where in the tree structure it is located on the toolbar. You can also use these breadcrumbs as links.
- **Action feedback and notifications**. When you perform a successful action, for example, publishing a page, it is confirmed by a message. Some status messages also require an action from you as shown in the following example:

  This symbol shows the number of status messages for the content, for example, to notify you to take action if the page contains any errors.
- **Tooltip**. You can view information about the page as a tooltip on mouse-over, for example, buttons, pages in the *tree structure*, page versions in the *version list*.
- **Drag-and-drop operations**. You can drag images and files from *File Manager* to the page you are working with, as well as a page from the tree structure to create a link on the page.
- **Customizable user interface**. You can drag the panes to the size you want, pin your settings, and add gadgets to the dashboard in EPiServer OnlineCenter and the panes for quick access. See *Customizing the Navigation Pane* and *Customizing the Assets Pane*.
- **Right-click actions**. Your partner developer has the option to activate actions on right-click in the editorial interface through configuration. Since this feature is not standard, it is not described.

Shared and Context-Sensitive Actions

The Navigation Pane supports common actions for pages in the tree structure, whereas the Toolbar gives you access to the relevant actions in a specific context. For example, when you select a page to edit you are assumed to change the content as well as saving and publishing the page. Therefore, only the buttons that are relevant for these functions are available.

Shared Actions

The Navigation Pane supports the following working procedures:

- Create a new page, see *Creating a Page*. This works in a similar way for blocks, see *Using Shared Content on a Page*.
- Change the tree structure, see *Moving, Copying and Deleting Pages*.

Context-Sensitive Actions

The Toolbar supports the following working procedures:

- Flow of editing and publishing a page, see *Editing Existing Content*. This works in a similar way for blocks, see *Using Shared Content on a Page*.
- Flow of scheduling publishing content, see *Saving and Publishing Content*.
- Flow of reviewing and approving publishing content, see *Saving and Publishing Content*.

Content Status on the Toolbar

The toolbar gives you the following status information of the content:

A page or a block that has been published will be in **Published Version** status.

A page or a block that has been set to **Ready to Publish** will be in **Ready to Publish** status.

A new page or a block that has not yet been published or set to ready to publish, will be in **Not Ready** status.

A published page or a block that has been changed but not yet published, will be in **Not Ready** status. It could also has been set to **Ready to Publish**, if it was not approved it will be in **Rejected** status.

A page or a block that has been scheduled for publishing:

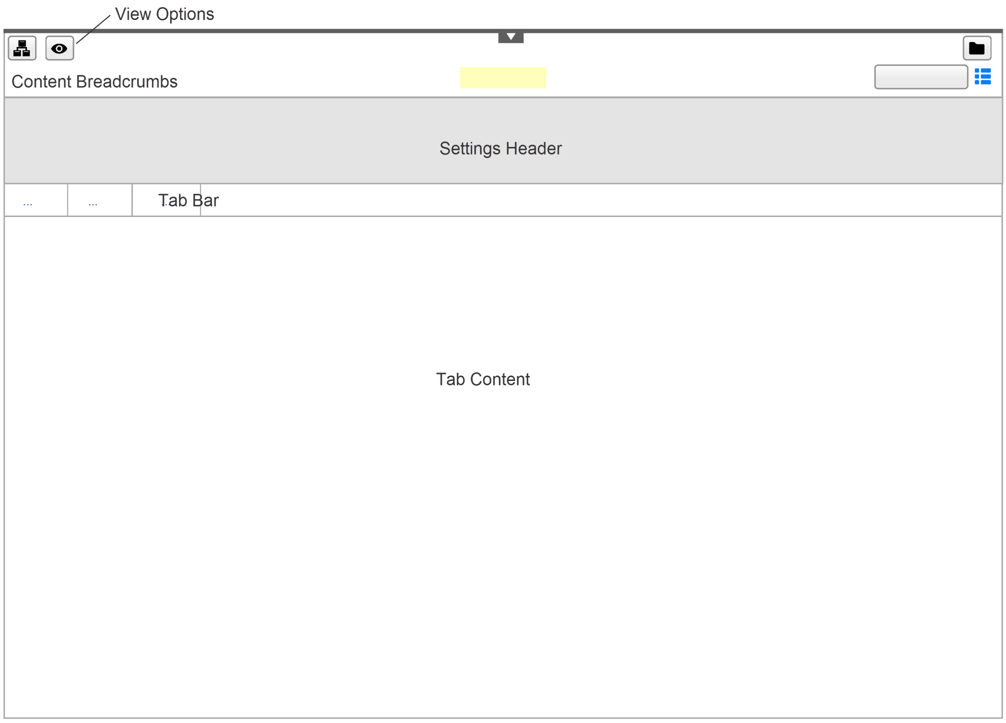
- New will be in **Published** status
- Changed will be in **Delayed Publish** status

For version management of blocks and pages, see *Managing Versions*.

Content Settings

There are two ways of editing content: The basic way through *On-Page Editing* and the full editorial interface with content settings through *Forms Editing*.

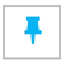
The image below shows the user interface parts and their names used in this documentation.

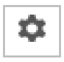


Customizing the Navigation Pane

The Navigation Pane contains the page tree structure and other gadgets for navigation, which you can customize. You can drag the panes to the size you want, pin your settings, and add gadgets to the dashboard in EPiServer OnlineCenter and the panes for quick access.

 **Show Navigation Pane**. Click to expand the pane to the default width. You can then drag to expand the pane to the size you want.

 **Pin Navigation Pane settings**. If you have expanded the pane, click to save your settings to the next time you log in to the website.

 **Navigation Pane settings**. Select either to add or rearrange gadgets on the pane.

For a list of available gadgets and how to add them to the dashboard or panes, see *Out-of-the-Box Gadgets*.

Pages Tab

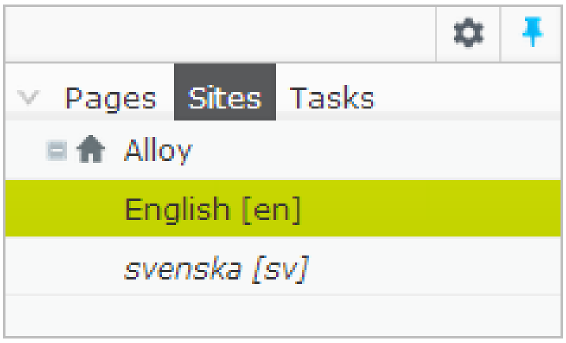
On the **Pages** tab you can navigate and change the tree structure.

If there are many pages on your website, you can search for a specific page by typing the page ID or a keyword in the search box (the page’s name or its content). All pages that match the keyword will be listed, select the page you are looking for, or click to clear your search and start over.

To change the structure of the website by moving, copying and removing pages, see *Structuring the Website*.

Sites Tab

On the **Sites** tab you can work with globalization of your content, see *Defining Language Settings*.



Tasks Tab

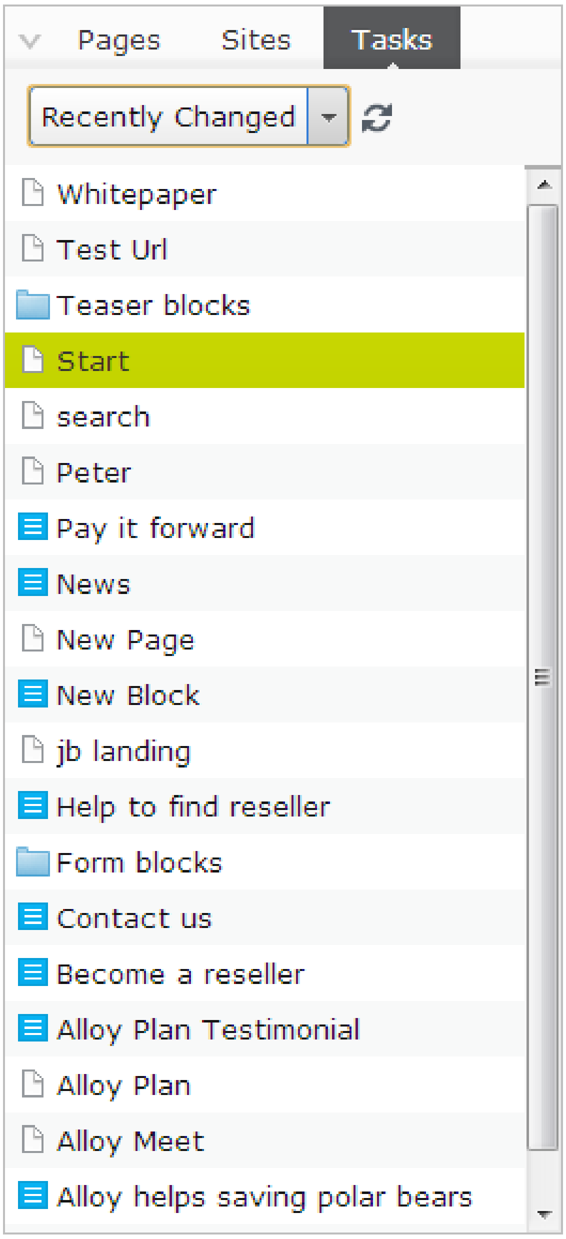
A **task** is a piece of information related to activities in EPiServer CMS, activities that usually require some kind of action. Tasks can be assigned either to an entire group of people or to individuals. A typical example is a page that is set as "Ready to publish" by an editor without publishing rights. A task will then be created with a link to the page, available for review and publishing by someone with publishing rights.

On the **Tasks** tab you can filter the following tasks:

- **Draft**. Content that has not yet been published in **Not Ready** status.
- **Rejected**. Content that has been sent to approval for publishing but was rejected.
- **Ready to Publish**. Content that is set to **Ready to Publish** status waiting for approval.
- **My Tasks**. Pages that are to be approved by you in a workflow, see *Using Workflows*.
- **Marked as Being Edited**. Pages and blocks that you have marked as being edited, see *Permanently Mark as Being Edited*. Use this list as a reminder to release the pages from the markup when you have finished editing them.
- **Recently Changed**. Content on the website that was recently changed, see the *Recently Changed Gadget*.

To take action on the tasks, click the link and you will be redirected to that content.

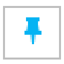
You can also add content to a page by dragging and dropping it from the **Tasks** tab.



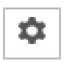
Customizing the Assets Pane

The Assets Pane contains metadata and other advanced settings for the page, which you can customize. You can drag the panes to the size you want, pin your settings, and add gadgets to the dashboard in EPiServer OnlineCenter and the panes for quick access.

Show Assets Pane. Click to expand the pane to the default width. You can then drag to expand the pane to the size you want.



Pin Assets Pane settings. If you have expanded the pane, click to save your settings to the next time you log in to the website.



Assets Pane settings. Select either to add or rearrange gadgets on the pane.

For a list of available gadgets and how to add them to the dashboard or panes, see *Out-of-the-Box Gadgets*.

Blocks Tab

On the **Blocks** tab you can work with reusable content on your website, see *Using Shared Content on a Page*.

For version management of blocks and pages, see *Managing Versions*.

Files Tab

On the **Files** tab you can work with images and files on your website, see *Managing Files*.

Editing Existing Content

When you select an existing page for editing, you have the following options on the toolbar:

Options or **Publish**. Click to publish or to select other options as described in *Saving and Publishing Content*.

Add new content. On the toolbar you have the combo button with options to create **New Block** or **New Page**. The new page draft will be created beneath the page you have selected. For a new block, you will be prompted to select block library. Also see the different view options as described in *Previewing a Page*.

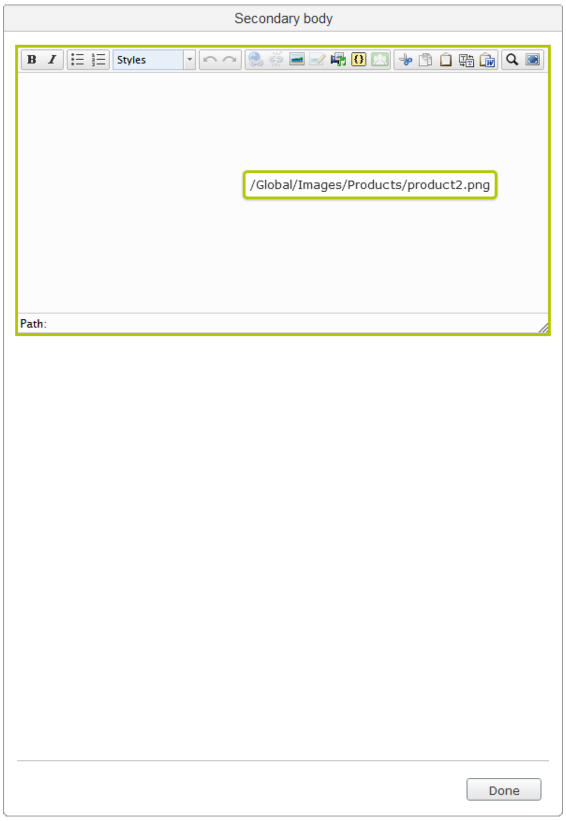
Content settings. Toggle to access all editing functions on and off for the page or block in a form view as described in *Editing Content Settings*.

Editing Text Directly on a Page

By default you can edit text directly on the page through basic text formatting functions.

Edit an existing page as follows:

1. Select the page you want to edit from the tree structure in the Navigation Pane. You can edit the highlighted content areas.
2. Move the mouse pointer over the piece of content you want to edit, and click it.
3. In the window that opens, make your changes.
4. When you are done, click **Done** or anywhere outside the window. Your changes are automatically saved, and a new page version will be created.
5. Publish the page.



Content Status on the Toolbar

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A new page or a block that has not yet been published or set to ready to publish, will be in **Not Ready** status.

A published page or a block that has been changed but not yet published, will be in **Not Ready** status. It could also has been set to **Ready to Publish**, if it was not approved it will be in **Rejected** status.

A page or a block that has been scheduled for publishing:

- New will be in **Published** status
- Changed will be in **Delayed Publish** status

For a description of saving and publishing options, as well as options for undo and redo changes, see *Saving and Publishing Content*.

To use the Rich-Text Editor, see *Basic Editing*.

To change the structure of the website by moving, copying and removing pages, see *Structuring the Website*.

To add images and embedded media, see *Inserting an Image into a Page* and *Inserting Embedded Media*.

You can create shared content as blocks and insert them on the page you are editing. Depending on your access rights you can also manage your blocks and folders through the **Blocks** gadget. To edit the settings for block, see *Editing Content Settings*.

Editing Links

You can edit some parts of the content through inline editing, for example, a footer containing links to other pages, or heading text on a page or a block.

In this example, edit the headings in the footer as follows:

1. Select the start page. You can edit the highlighted content areas.
2. Move the mouse pointer over the piece of content you want to edit, and click it.
3. Type to change the text in the field, for example, the heading.
4. When you are done, click anywhere outside the field you have edited. Your changes are automatically saved.

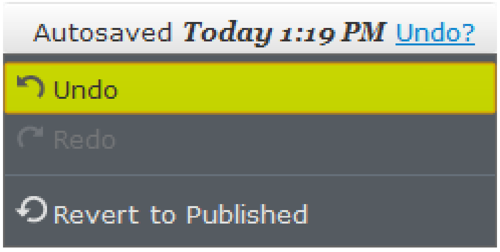
Saving and Publishing Content

You can preview the page as you are working with it, and your changes are automatically saved. Depending on your access rights for publishing of pages, you will have different options available. If you are done editing, submit it for review or publication. Or, continue working on the page.

You can either create a new page or edit an existing page for publishing, as described in *Creating a Page* and *Editing Existing Content*.

Whenever you start working on a page after it has been saved, you will get a "draft version". You can also republish an earlier published version. For version management of blocks and pages, see *Managing Versions*.

Using Autosave



When you are working with a page, you can see it being saved through the Autosave function with a system-generated timestamp. Click **Undo?** to select any of the following options:

- **Undo** to discard your changes on the page you are editing.
- **Redo** if you discarded your changes through **Undo** and want to take them back again.
- **Revert to Published** to take back the latest published version.

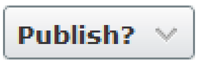
If you are several editors working on the same content you will work with a shared draft by default, meaning that your changes are saved in the same version, see *Editing a Shared Draft Version*. You can also create a new version.

Publishing a Page

Publishing of content in EPiServer CMS provides different options depending on which specific context you are working in.

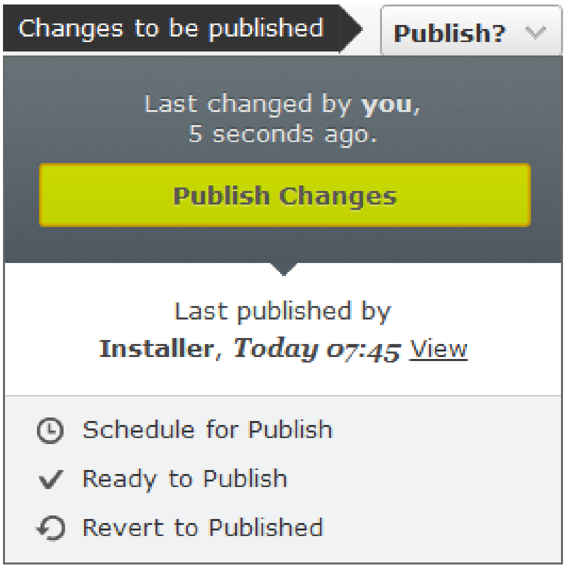
The publishing options appear as the following combo button:

The **Options** button appears until you change anything on the page.



The **Publish?** button appears when you change any of the content on the page, and it transforms according to your access rights. The publishing option is displayed as the primary action by default. If you have access rights for publishing of pages, both the **Publish** and **Ready to Publish** options appear. If you do not have access rights for publishing of pages, only the **Ready to Publish** option appears.

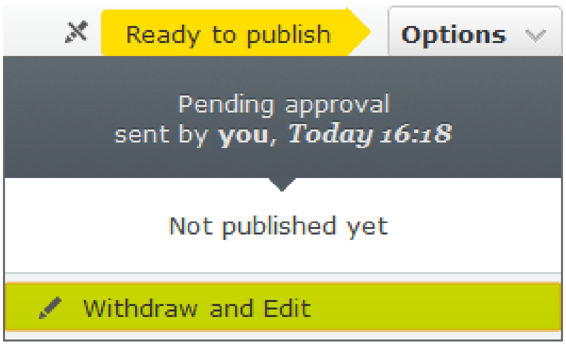
Clicking the combo button expands a drop-down menu containing several options. These options transform according to your access rights and the content version status.



Under the publishing button you can see information about when and by whom the page was last changed and saved. Clicking **View on website** will take you to view the current published page as your visitors see it.

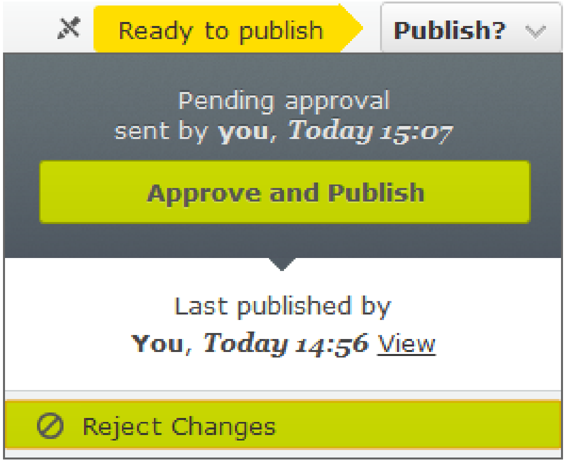
Depending on your access rights, you have the following options:

- **Publish**. To use this option you need to have access rights for publishing of pages. When you are done and select **Publish**, the button disappears and your changes are immediately visible to visitors. Successful publishing is confirmed by an action feedback and the page is set to **Published** version status.
- **Ready to Publish**. Use this option if you want to send the page for review to prepare it for publishing. This is most often used when you do not have access rights to publish information. Instead the page can be assigned to another person with access rights to approve pages before they are published. When you are done and select **Ready to Publish**, the page will be submitted for approval and available for publishing by someone with publishing access rights. Even if you are authorized to publish information, you may want someone to review the page. Once a page is set to as ready to publish, the following options are available:
    - **Withdraw and Edit**. If you are an editor without publishing rights, select this option if you have sent a page for review but want to take it back for further editing.

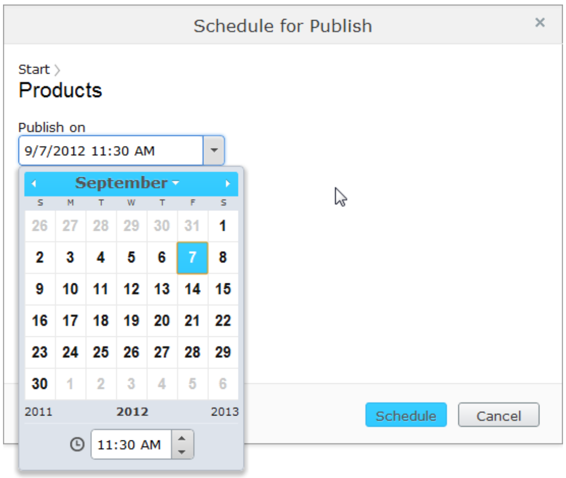


    - **Approve and Publish**. Select this option if you are assigned to approve pages for publication.

- **Reject Changes**. Select this option if you are assigned to approve pages for publication. If you reject the changes, the page will then be set to **Rejected** version status and the most recently published version will be displayed to the visitors.



- **Schedule for Publish**. You can schedule publishing of a page you have just created as well as an existing page you have made changes on. Selecting this option opens a window where you select a date for the publishing of the page to start. Click **Schedule for Publish** to apply your scheduled publishing, or select **Remove Scheduling and Edit** to continue editing. When you schedule a new page, the symbol of a clock will appear in the tree structure.
  Normally, pages are continuously updated and never expires, but you can set a date for the publishing to stop, see *Setting a Date to Stop Content of Being Published*.



  You cannot make any changes or access the settings on a scheduled page. When you schedule publishing for pages and blocks, you have an option to create a new draft version. Select **Options** > **New Draft from Here**, and the new draft version opens for editing.

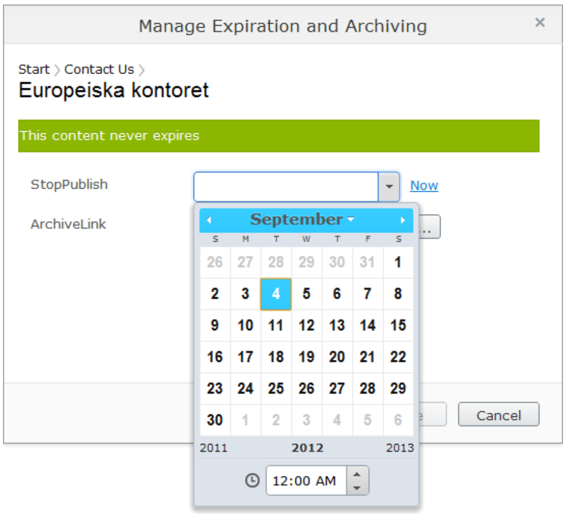
- **Revert to Published**. You can discard your changes of the page you are editing and take back the latest published version.

If two users try to save and publish the same page simultaneously, the system will display a warning informing that you might overwrite each other’s changes. To avoid version conflicts, you can use the *Permanent Editing Indication*.

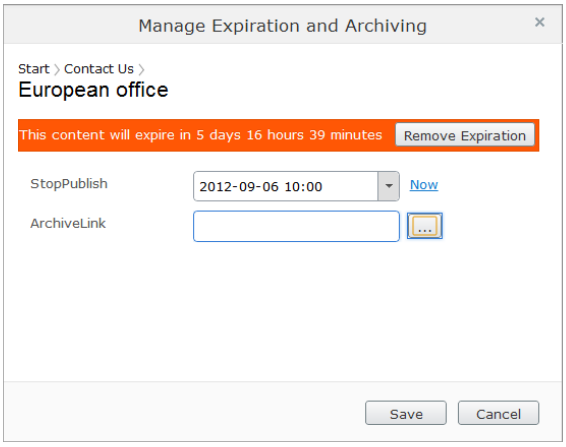
Setting a Date to Stop Content of Being Published

You can select a specific date and time for the content to stop being published, meaning that the page cannot be viewed by the visitors anymore. This is done from the settings view, see *Editing Content Settings*.

1. In the **Tools** drop-down list, select **Manage Expiration and Archiving**.
2. Select the date and time when you want the page or block to stop being published, or select **Now** if you want it to apply immediately. You can also type the address where you want the content to be archived.



3. Confirm that you want the content to stop being published by clicking **Save**, or discard you changes by clicking **Remove Expiration**.



Instead of stop publishing, you can remove the page from the website as described in *Moving, Copying and Removing Pages*, or delete permanently as described in *Handling Content in Trash*.

Creating a Page

When you create a page, you need to select a page type. Depending on your access rights, all possible page types that are available for selection under a particular node are listed in groups. The most common page types are listed under the **Suggested Page Types** group by default, but your organization may have created other groups through configuration.

You have the following options in the Navigation Pane:

New page. To create a page, see *Creating a Standard Page*.
On the toolbar you have the combo button with options to create **New Block** or **New Page**. The new page draft will be created beneath the page you have selected. For a new block, you will be prompted to select block library.

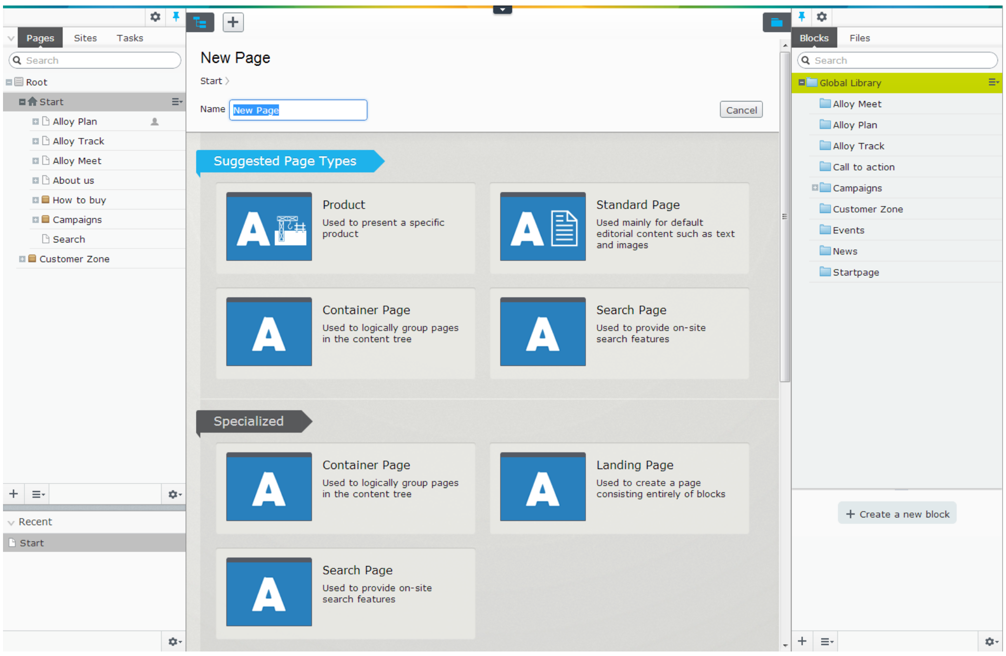
Page options. Here you have options depending on which context you are in, for example, copy or move a page.

Settings. Here you have options for the gadget, for example, remove gadget.

For a description of saving and publishing options, as well as options for undo and redo changes, see *Saving and Publishing Content*.

To change the structure of the website by moving, copying and removing pages, see *Structuring the Website*.

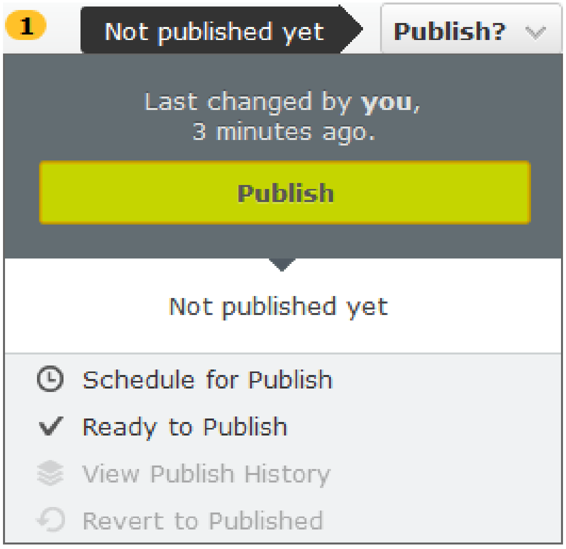
Creating a Standard Page



Create a page based on the most commonly used page type **Standard page** in a standard installation as follows:

1. Select the page in the tree structure where you want the new page. The new page will be created under the page you have selected.
2. From the Navigation Pane or toolbar, select **New Page**.

3. In **Page name**, name the page otherwise it will be named “New Page” by default. The page name will be shown in the tree structure and in the menus.
4. Move the mouse pointer to highlight a page type. The page types are grouped together suggesting the most commonly used. Select the page type **Standard page**.
5. Start editing directly on the page. The **Main body** and **Secondary body** sections are high-lighted editable areas in which you write the information. Toggle *Forms Editing* to format the text, load images, create links and work with tables. The text in **Main body** will be displayed in the middle of the page and the text in **Secondary body** will be shown in the right column of the page.
6. Toggle *preview* with several options, such as media channels. Your changes are automatically saved. You can continue to work with the page.
7. When you are done, click **Publish** to make the page accessible to visitors and appear in the menus. Or, send the page for review by clicking **Ready to Publish**.



Content Status on the Toolbar

The toolbar gives you the following status information of the content:

A page or a block that has been published will be in **Published Version** status.

A page or a block that has been set to **Ready to Publish** will be in **Ready to Publish** status.

A new page or a block that has not yet been published or set to ready to publish, will be in **Not Ready** status.

A published page or a block that has been changed but not yet published, will be in **Not Ready** status. It could also has been set to **Ready to Publish**, if it was not approved it will be in **Rejected** status.

A page or a block that has been scheduled for publishing:

- New will be in **Published** status

- Changed will be in **Delayed Publish** status

Creating Content Based on Other Content Types

EPiServer CMS comes with an example site and a number of templates of page types and block types for you to be inspired by. For example, you can see how to use news feed, calendar and document lists, see *Sample Site and Templates*.

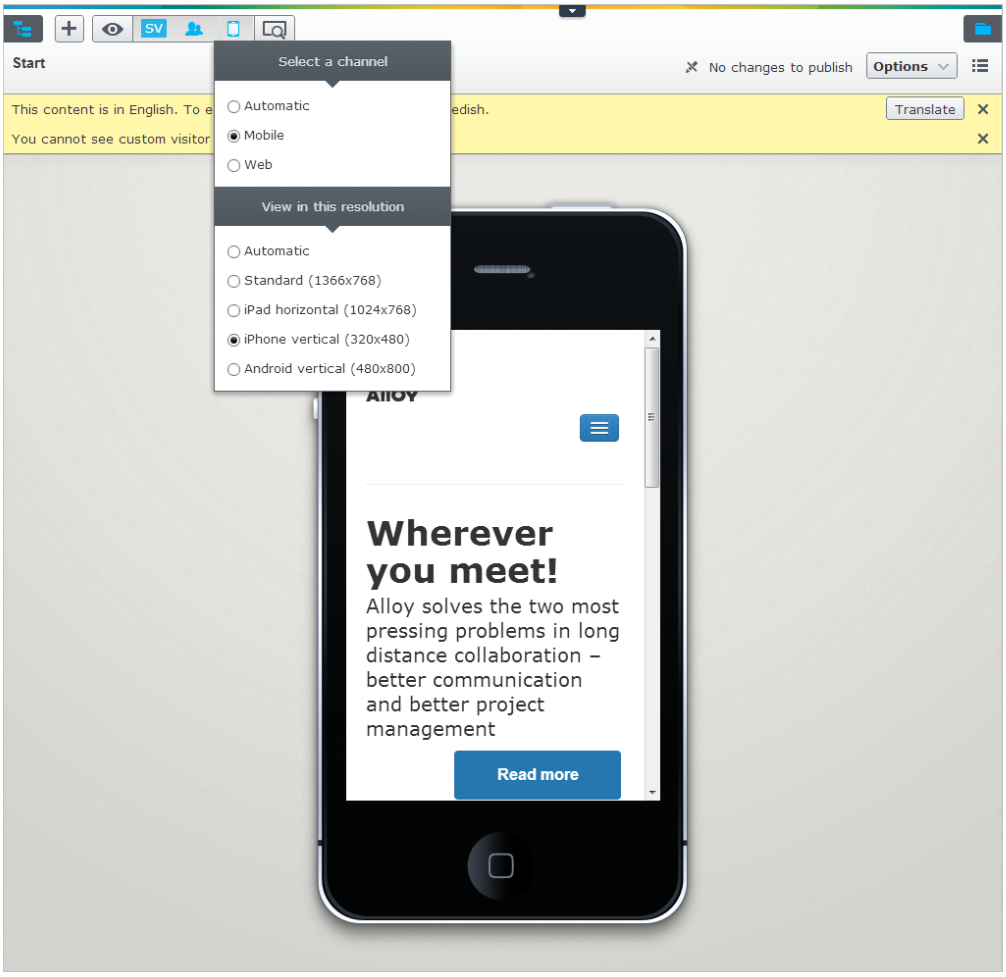
For a description of saving and publishing options, as well as options for undo and redo changes, see *Saving and Publishing Content*.

To change the structure of the website by moving, copying and removing pages, see *Structuring the Website*.

You can create shared content as blocks and insert them on the page you are editing. Depending on your access rights you can also manage your blocks and folders through the **Blocks** gadget. To edit the settings for block, see *Editing Content Settings*.

Previewing a Page

In EPiServer CMS you can preview the page that you are editing through different media channels, for example, a smart phone.



You have the following options to preview the page:

Preview. Toggle preview the page as the visitors would see it live. Click again to jump back to the editorial interface.

View settings. Click the eye symbol to preview the page through different media channels presets.

Tip You can combine toggling **Preview** and **View settings**.

Selecting Media Channels

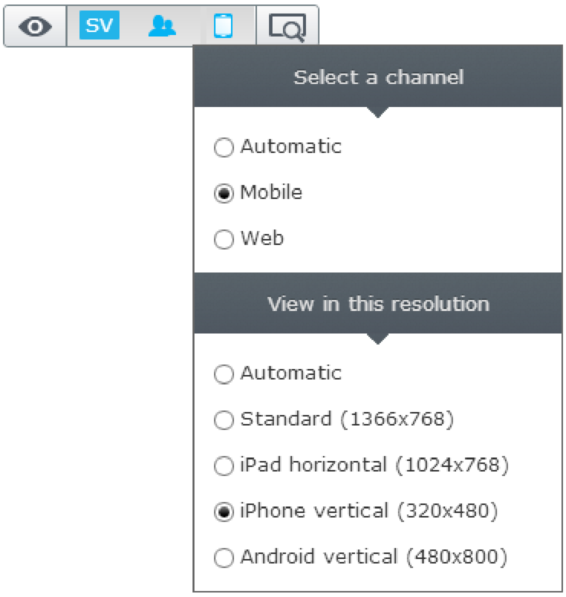
Click the eye symbol to select any the following view settings of the page:

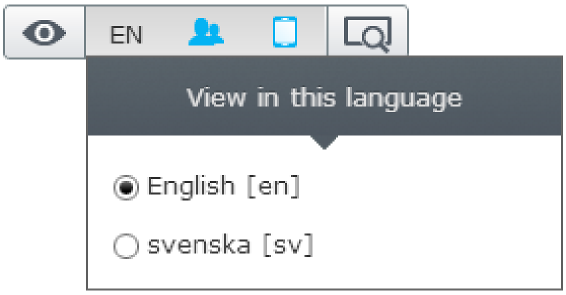
- **Languages**. When the view settings menu is open, you can view the page content in the current language. If other languages are activated in the editorial interface on the website, you can select any of these in the drop-down menu and translate the content as described in *Globalizing Content*.

- **Visitor groups**. You can view the page content as the visitor groups you have created for the website see it as described in *Personalizing Content*.
- **Media channels**. Select to view the page as displayed for the presets in a standard installation: **Automatic**, **Mobile** and **Web**. Then select the configured resolution, for example, a large screen or smart phone.

The preview settings for the presets are “sticky”, meaning that when selecting any of the settings you can browse several pages and keep that setting activated. You will also keep the preview setting when editing the page directly on the page, but if you switch over to edit the *content settings* as well as create new *pages* and *blocks*, the preview will be turned off. If you toggle the eye symbol to release it, the settings for the page will be set back to defaults.

Depending on how the website is configured, the presets can look as shown in the following example of a standard installation:



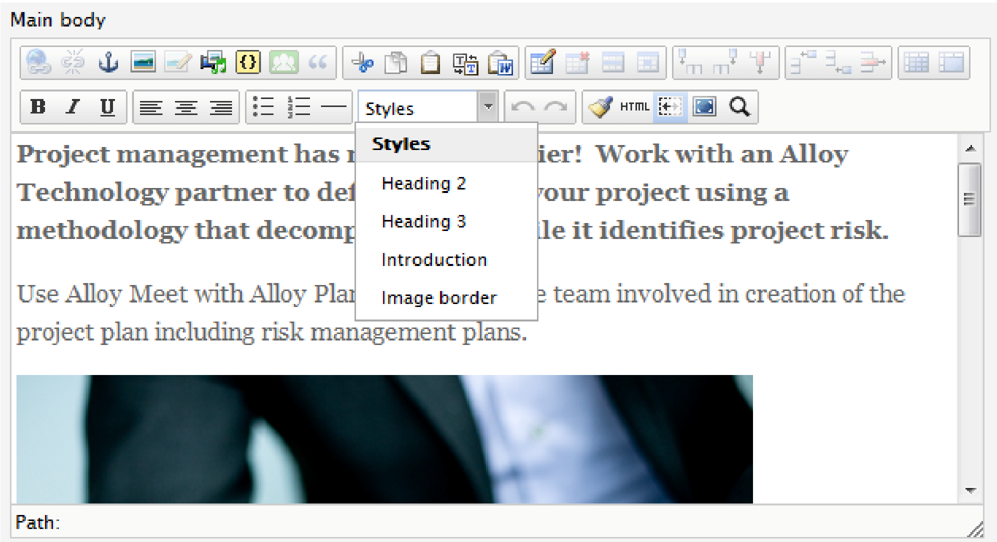


Basic Editing

The procedure for creating and editing pages and blocks include the following steps:

1. Decide where you want the page to be located and create the page.
2. Select page type.
3. Name the page, enter properties and content.
4. Save the page. You may want to continue work with the page, such as adding text and images.
5. Publish the page.

Rich-Text Editor



The **TinyMCE Rich-Text Editor** is where you enter much of the information of the web page, such as text content, formatting, images, tables and links to other pages or documents.

EPiServer CMS comes with a selection of editor functions (buttons) that are normally activated in a standard installation. You can define which buttons to be available in the editor by activating or deactivating them in the administrative interface of EPiServer CMS.

Available Buttons on the Editor Toolbar

The function of each button is displayed when you move the mouse pointer over it. The following buttons are available in a standard installation of EPiServer CMS:

	Insert/edit link	Display the link dialog box for insertion or editing of link. It is dimmed until you select the text to be included in the hyperlink. See *Adding Links*.
	Unlink	Remove a link from the selected text. It is dimmed until you place the cursor in the hyperlink.
	Insert/edit anchor	Insert or edit an anchor (bookmark) in the text. See *Creating Anchors*.
	Insert image	Insert an image in the editor area of your page, and change image properties. See Working with Images.

	Edit image	Edit an image on your page.
	Insert/edit embedded media	Insert media content such as video into the editor area of your page. See *Inserting Embedded Media*.
	Insert/edit dynamic content	Insert dynamic content by using content from other pages to update the page.This means that the information only needs to be changed in one place for it to be updated on all the pages that use that information. See *Adding Dynamic Content to a Page*.
	Personalized content	Insert or edit personalized content. It is dimmed until you select the text to be included in the personalized content. See *Adding Personalized Content to a Page*.
	Insert/edit quote	Mark the selected text as a quote. See *Working with Quotes*.
	Cut	Cut the selected text and put it on the clipboard.
	Copy	Copy the selected text and put it on the clipboard.
	Paste	Paste content from the clipboard to the editor area of your page.
	Toggle paste as rich/plain text	Toggle paste content to the editor area of your page as rich text or plain text. See *Copying Text from Other Programs*.
	Paste from Word	Paste content into the editor area of your page with any word formatting of content cleaned up.
	Insert a new table	Insert a table into the editor area of your page. See *Working with Tables*.
	Delete table	Delete a selected table. It is dimmed until you place the cursor in the table.
	Table row properties	Opens dialog box for table row. It is dimmed until you place the cursor in the table.
	Table cell properties	Opens dialog box for table cell. It is dimmed until you place the cursor in the table.
	Insert column before/after	Insert table column before and after selection. It is dimmed until you place the cursor in the table.
	Remove column	Remove the selected table column. It is dimmed until you place the cursor in the table.
	Insert row before/after	Insert table row before and after selection. It is dimmed until you place the cursor in the table.
	Delete row	Delete the selected table row. It is dimmed until you place the cursor in the table.
	Split merged table cells	Split table cells that have been merged. It is dimmed until you place the cursor in the table.
	Merge table cells	Merge table cells that have been split. It is dimmed until you place the cursor in the table.
B *I* U	Bold Italic Underline	Select single words in the text to format it with bold, italic or underlining. (The options that are available depends on your installation.) You can remove all formatting by selecting the text and then select a style in the **Styles** drop-down list.
	Align left Align center Align right	Align the text to the left, center or the right.

	Unordered list	Place the cursor to create bulleted list of the text.
	Ordered list	Place the cursor to create a numbered list of the text.
	Horizontal rule	Place the cursor to create a horizontal rule.
	Styles	Displays a drop-down list with available style formats for formatting text (which reflects the CSS style sheets on the website).
	Undo Redo	Undo or redo of previous actions.
	Clean up messy code	Remove invalid code, for example, Word formatting. This function is useful when you have been working with cut and paste to restructure the text, accidentally deleting HTML tags in the process. This function will go through the text and “clean” up any missing or incorrect formatting tags. For example, if you accidentally deleted a block quote end tag, the </blockquote> will be added in the appropriate place to make the HTML code complete.
	Show / Hide HTML source	Display the HTML code. If you are proficient in the use of HTML, you can switch to HTML mode and create or modify your page writing HTML code directly. You can also check the HTML code and make minor adjustments to the page.
	Toggle invisible elements	Toggle marking of links on and off (and anchors and quotes).
	Toggle full screen mode	Toggle full screen and normal screen mode when working with large volumes of text and images. Click the button again to restore the editor area to its original size.
	Find	Search for and replace a text within the editor area of your page.

Path and Word Count

When you click a piece of text in the editor area while editing it, the HTML tag for the text will be displayed in the **Path:** section at the bottom left part. For instance, if you have formatted the text with bold, the **Path:** section will display "Path: p >> strong". This is useful when checking that the text is correctly formatted.

In the bottom right corner of the editor area, the **Words:** field displays the actual word count for the content. This function can be turned off from the administration interface of EPiServer CMS.

Spell Checking

Spell checking is done by using that built-in function of the web browser. Open the text you want to spell check for editing. Place the cursor in the text and select spell check on right-click. Follow the options available in the browser.

Formatting Text Using Style Templates

Always use predefined formats to give the website a consistent look and feel, as well as for accessibility and search optimization reasons. This means that when you format a text with ”Heading 2”, these headings will have a uniform appearance all over the site. Available formats are linked to the style of the site through the CSS files for the website.

You can find the available formats in the **Styles** drop-down list on the editor toolbar. To set the style of the content on your website (headings, body text, and more), select the piece of content to be formatted and then the format you want in the drop-down list.

This way the correct HTML tags will be applied to your content, which is an advantage both from an search optimization and accessibility perspective.

This list can be extended to also contain different classes (predefined formatting). You can for instance apply a specific introduction formatting to a text, apply a special table layout or position an image in the top right corner with the text floating around it. This is all done by applying CSS classes that are predefined for your website. When the CSS classes have been defined they will be available in the **Styles** drop-down list.

To change and add formatting styles on your website and make them available in the editor, check with your system administrator.

You can emphasize single words in the text by using the toolbar buttons to create text in bold, underlined or italic.

Inserting Paragraph Break and Line Break

The editor works like any other word processing program. You write the text, and the text wraps around when the line reaches the end. You have the following options:

- **Paragraph break**. Press ENTER in the editor area and you will get a paragraph break, which often provides extra space between the paragraphs (depending on how it is defined in the CSS file). A paragraph break will generate a </p> tag in the HTML code on your web page.
- **Line break**. Press SHIFT + ENTER in the editor area and you will get a line break, which provides **none** extra space between the lines. A line break will generate a </br> tag in the HTML code on your web page.

Using Shortcut Keys in the Editor Area

To make your editing work easier, the following shortcut keys on the keyboard carry out certain commands:

Command	Shortcut key
Undo	CTRL + Z
Redo	CTRL+ Y
Bold	CTRL +B
Italic	CTRL + I
Underline	CTRL + U
Paragraph (p)	CTRL + 7
Divider (div)	CTRL + 8
Address	CTRL + 9
Insert quote	CTRL + SHIFT + Q
Insert link	CTRL + K

Depending on specific plug-in customizations in your implementation, and also on the browser you are using, certain shortcuts may not work properly as described.

Copying Text from Other Programs

You can copy text to EPiServer CMS from any program you want. The important thing is to paste the text in a way to follow the graphical profile of the website. By pasting the text the correct way you will avoid getting formatted text on the page not appearing in the way you want it to. You have the following options of pasting text into the editor area:

Toggle paste as rich/plain text will paste the text as rich text by default. Toggle to paste as plain text.

Paste from Word will transform the text formatting from Word into the website’s style, keeping some of the formatting from the Word document. For a successful result the headings and body text must be properly formatted using the available template styles in Word. When you copy text from Word and paste it into an page, for example, a ”heading 2” in Word will be converted into the ”heading 2”.

> Do not paste the text using CTRL+V directly in the editor area, as this will paste it in with the format it had in the source program.

Toggling Paste as Rich/Plain Text

Paste text with the **Toggle paste as rich/plain text** option as follows:

1. Select and copy the text in the program you want to copy from.
2. Select the page for editing.
3. Click the **Toggle paste as rich/plain text** button on the editor toolbar.
4. Use keys CTRL+V to paste the text.

Pasting Text from Word

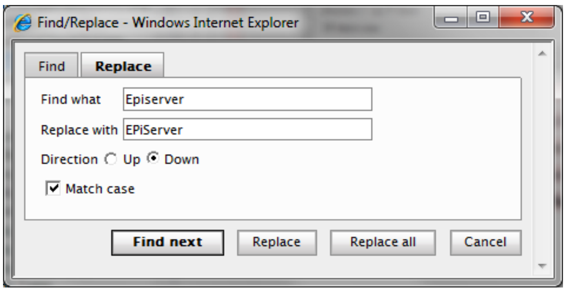
Paste text with the **Paste from Word** option as follows:

1. Select and copy the text in the program you want to copy from.
2. Select the page for editing.
3. Click the **Paste from Word** button on the editor toolbar.
4. Use keys CTRL+V to paste the content into the **Paste from Word** window.
5. Click **Insert** to insert the content into the page. Use the preset formatting options to format the text.

Finding and Replacing Text

Search for and replace words in the editor area of a page as follows:

1. Place the cursor in the editor area and click the **Find** button on the editor toolbar.
2. In the **Find/Replace** dialog box , select the **Replace** tab if you also want to replace words as you search in the text.
3. In **Find what**, type the word you are looking for.



4. In **Replace with**, type a replacement word if you want to do search and replace for a word.

5. In **Direction**, select whether to search upwards or downwards in the text.
6. Select **Match case** if you want to search for the word using the exact cases for the letters.
7. Select **Find next**, **Replace** or **Replace all**.

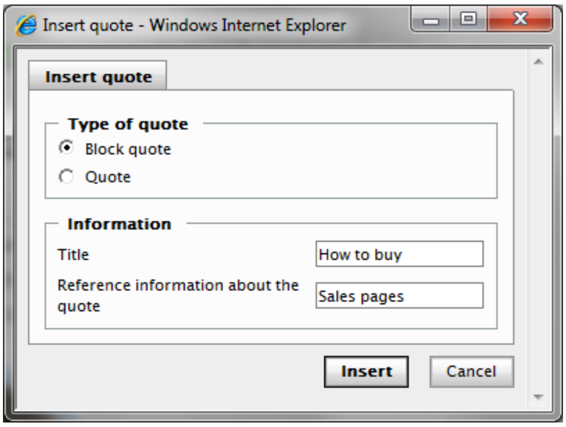
Working with Quotes

You can mark text as a quote, which is useful if you are working with accessibility on your website. With the **Insert quote** tool, you can format the text so that visitors using various aids to read the website can distinguish quotes from other text. You can format both short (part of a text) and long quotes (whole paragraphs) and you can enter a title and source for the quote.

Inserting a Quote

Insert a quote as follows:

1. In the editor area, select the words or the paragraph that will form the quote.
2. Select the **Insert Quote** button “ on the editor toolbar.
3. Under **Type of quote** you can select whether the quotation is a **Block quote** (whole paragraph, one or more) or a **Quote** (part of a text). If you have chosen to enter a **Quote** in **Type of quote**, this will be shown with a blue marking in the editor.



4. In **Title**, type a title for the quote.
5. In **Reference information about the quote**, enter the source (often the URL address for a website).
6. Select **Insert**.

If you look at the HTML code for the text, the quote part will receive the correct tagging, in this case the <blockquote> tag.

```
<p>These are famous rows from famous plays of famous writers.</p>
<blockquote title="Hamlet" cite="William Shakespeare ">
<p> </p>
<p>To be or not to be, that is the question...</p>
<p> </p>
</blockquote>
<p>There is certainly more of this.</p>
```

The appearance of the quote on the web page depends on how you have defined it in the style templates of your website. A quotation is usually marked with italic text, quotation marks or an indent.

Deleting a Quote

A quote can be removed from a text. This means that the quotation formatting tags will be removed from the text, but the text will still remain.

Delete a quote as follows:

1. Open the text with the quote for editing.
2. Select the quote by placing the cursor on it.
3. Select **Quote** on the editor toolbar.
4. Select **Remove quote**.

Adding Images

EPiServer CMS has an image editor to be used when working with images. To display images on a page they must be available on the web server through the File Manager.

Unlike many other computer applications, a web page does not embed images. Instead, it uses a link to the image and location on the web server upon which the image is stored. This means that if you delete an image from the web server it will also disappear from the page.

You can work with the following image editing tools:

Click to insert an image from the File Manager. Also use this tool to set properties for the image on a page, for example add a class, see *Changing Image Properties*.

Click to make changes to the image itself on the page instead of editing the image in a third-party software, for example, cropping, resizing and transforming (flipping, rotating and turning to grayscale). You can also save the changed image as a copy with a new name, see *Editing Images*.

> For accessibility reasons (for example, people who are visually impaired) it is important to describe the image in words by typing a text in the **Image description** box.

Pages have different content areas depending on which properties that has been set up for each page type respectively. You can drag and drop different items to these content areas, for example, drag an image and drop it to an area that supports image properties, or a block to areas that supports that kind of content.

You can use drag-and-drop operations to create the following content on a page:

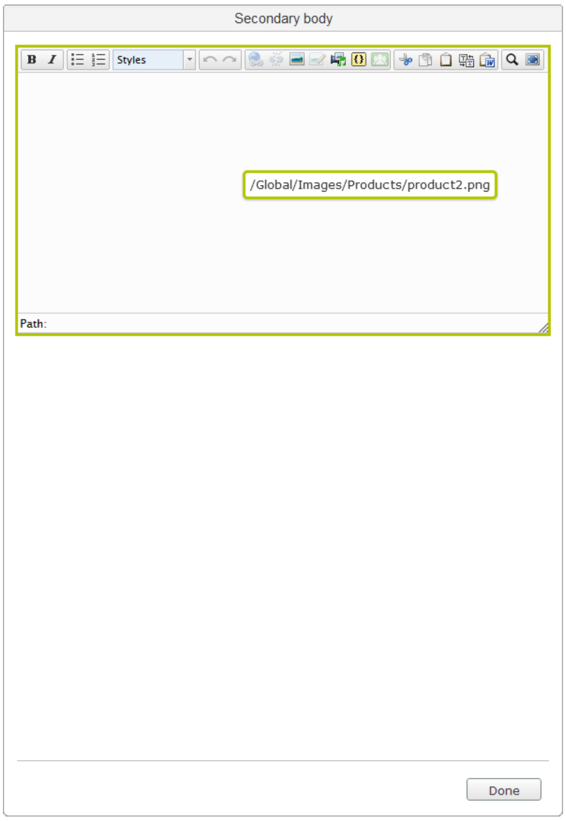
- *Inserting an image*
- *Creating links by dragging a page in the tree structure into a page in the Rich-Text Editor*
- *Adding content from pages and blocks*

To upload, copy, move and delete files, see *Managing Files*.

Adding an Image through Drag and Drop

Insert one or several images by dragging and dropping them directly from the File Manager into a page as follows:

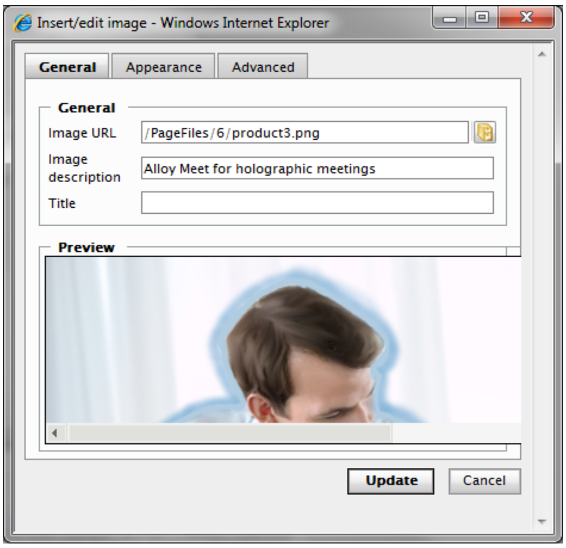
1. Edit the page with the File Manager open.
2. Select the image you want and drag it to the desired position on the page. The image will be displayed directly on the page.



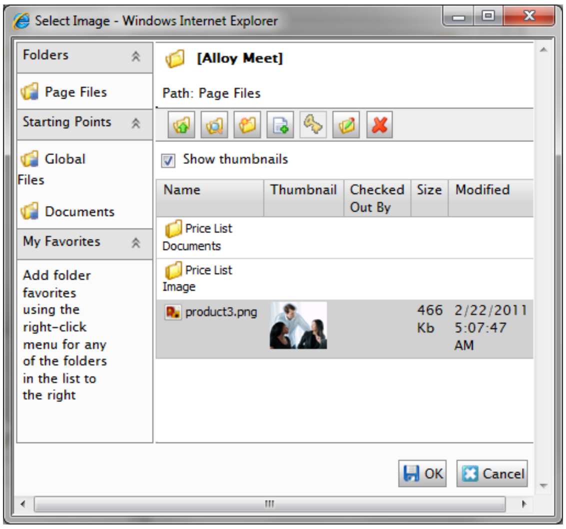
Selecting the Image through the Editor Toolbar

Insert an image into a page as follows:

1. Place the cursor in the editor area of your page where you want to insert your image.
2. Click the **Insert/edit image** button on the editor toolbar.
3. In **Image description**, type a description of the image.
4. In **Title**, type a title for the image to be displayed when the mouse pointer is moved over the image.
5. In the **Image Editor** window, click the **File Manager** button to the right of **Image URL** to browse and select an image in the File Manager.



6. In the File Manager, select the image by clicking its name. To see thumbnails, select **Show thumbnails**. Insert the image by clicking **OK**.



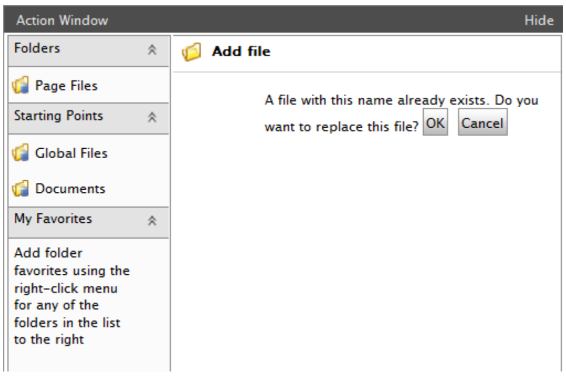
The image appears in the preview section of the image editor.

7. Click **Insert** and the image will be linked to the page.

Replacing an Image

The easiest way to replace an image on the web server is directly in the File Manager. To replace an image on the web server with a new one, the images must have the exact same name and be stored in the same folder. Replace an image as follows:

1. Open the File Manager on the editor toolbar.
2. Browse for the folder where the image you want to replace is stored.
3. Select **Add new file** in the File Manager toolbar and click **Browse**.
4. Locate and select the image file that has the same name as the one you want to replace.
5. Click **Save**. A message will appear with the question if you want to replace the file.



6. Confirm by clicking **OK**. The new image is now uploaded to the web server and replaces the old image.

Editing Images

You should always try to have as small file size for images as possible on web content to avoid long downloading times. Therefore compress the image to a smaller file size by cropping or resizing it as described below.

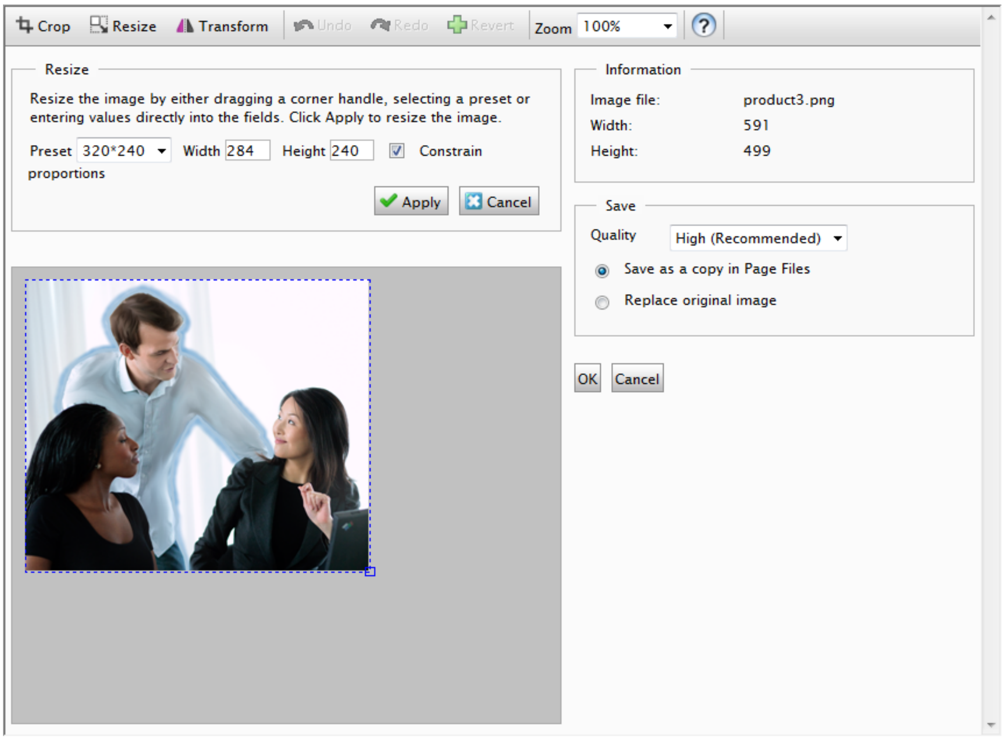
Web pages often have a limit for how wide the images can be, check this with your systems administrator. The maximum width is usually around 500–600 pixels. You can also change the actual appearance of the image, see *Changing Image Properties*.

Access the image editor for editing and saving an image in the following ways:

Using the Image Editor

Edit the image in image editor as follows:

1. Select the page for editing.
2. Select the image on the page you want to change.
3. Click the **Edit image** button on the editor toolbar.
4. In **Image Editor**, make the changes to the image.



5. When you are done, you have the following options for saving the changes:
   - Select **Save as a Copy in Page Files** to save the image as a copy of the original image. The system suggests a file name, but you can change it if you want. The copy will be saved in the page files folder in the File Manager. When you are done, click **OK**.
   - Select **Replace Original Image** to replace the original image in the File Manager with the edited image. Confirm by clicking **OK**.

Using the File Manager

Edit the image in the File Manager as follows:

1. Go to the page in edit mode and open the File Manager.
2. Select the image you want to change by right-clicking it and selecting **Edit**.
3. Make the changes to the image in the **Image Editor** window.

4. When you are done, you have the following options for saving the changes:
   - Click **Save as** to save the image as a copy of the original image. The system suggests a file name, but you can change it if you want. The copy will be saved in the same folder as the original image in the File Manager. When you are done, click **OK**.
   - Click **Save** to replace the original image in the File Manager with the edited image. Confirm by clicking **OK**.

Cropping, Resizing and Transforming an Image

> For cropping and resizing images it is also possible to select a predefined value from the **Preset** list. These values are defined by the system administrator in the **web.config** file of your website.

Make manual changes to the image itself in the following ways:

Cropping an Image

Crop an image as follows:

1. Select the image you want to crop.
2. Click the **Edit image** button on the editor toolbar.
3. Click **Crop** in the toolbar of the **Image Editor** window.
4. Crop the image by either entering values in the **Top**, **Left**, **Width** and **Height** boxes or by drawing a selection in the image.
5. Click **Apply**. Save the image and click **OK**.

Resizing an Image

Resize an image as follows:

1. Select the image you want to resize.
2. Click the **Edit image** button on the editor toolbar.
3. Click **Resize** in the toolbar of the **Image Editor** window.
4. Change the image size by either moving a corner handle or entering a value in the **Width** and **Height** boxes. Keep **Constrain proportions** selected to retain the image’s proportions.
5. Click **Apply**. Save the image and click **OK**.

Transforming an Image

Transform an image as follows:

1. Select the image you want to transform.
2. Click the **Edit image** button on the editor toolbar.
3. Click **Transform** in the toolbar of the **Image Editor** window.
4. Flip or rotate the image, or select **Grayscale** if you want to convert to grayscale.
5. Click **Apply**. Save the image and click **OK**.

Replacing an Image on a Page

Replace an image on a page as follows:

1. Select the image and click the **Insert/edit image** button on the editor toolbar.
2. Browse to the new image by clicking the **File Manager** button . Remember that if you upload a new image with the same name as an existing image in the same folder, the new image will replace the old on the web server.

Deleting an Image

To delete an image from the page, select it and press **Delete**. The image disappears from the page, but is not deleted from the File Manager.

Changing Image Properties

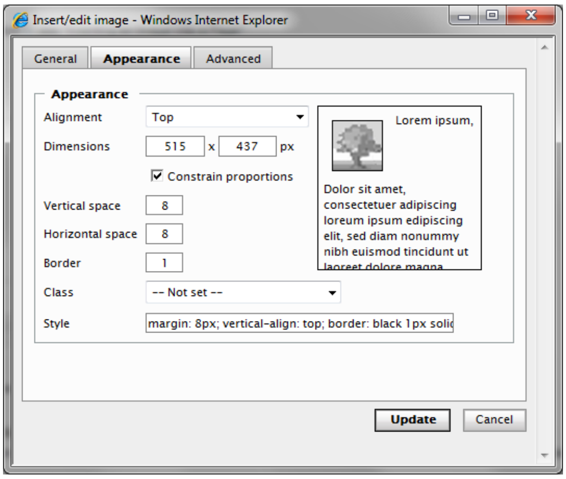
Change the actual appearance of an image by changing its properties as follows:

1. Select the image you want to change in the editor area.
2. Click **Insert/edit image** button on the editor toolbar and change the properties by selecting any of the following tabs:

General

To change the **Title** and **Image description**, see how to insert an image on a page.

Appearance



By selecting the **Appearance** tab, the following functions are available:

Changing the Display Size of an Image

Most often you will change both the file size and the display size of an image, but there might be cases where you want to change the display size only.

Be careful with this option in order not to “hide” a large image file behind a smaller display size, causing the page to load slowly.

Change the display size of an image as follows:

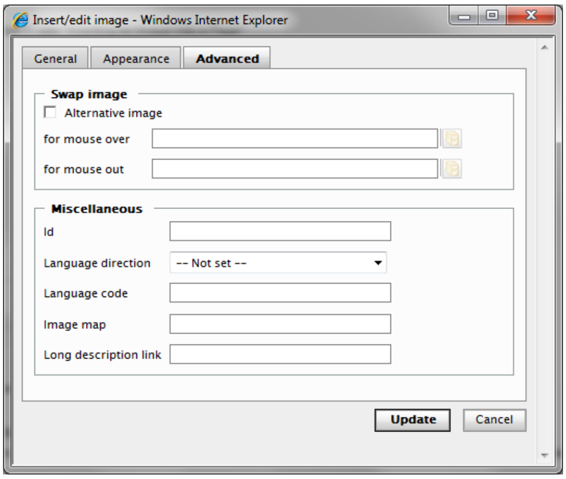
1. In **Dimensions** , ensure that **Constrain proportions** is selected in order to keep the image proportions. Enter the width of the image in pixels, and the height will be changed accordingly.
2. Click **Update** to save your changes.

Positioning an Image

Imagine that you have a large amount of text on a page and want to place an image in the top right corner with the text floating around it with some space padding between the image and the text. The preview window allows you to see the result of the different options you choose. Position an image as follows:

1. You have the following ways of positioning images in relation to text in the editor:
   - **Manual option**. In **Alignment** , select **Right** to position the image in the top right corner. In **Style** you can see the values that have been set for the image.
   - **Preset style option**. If CSS classes are available for positioning images, you can select a class from the **Class** drop-down list, see *Formatting Text Using Style Templates*.
2. In **Vertical space** and **Horizontal space**, add a value in pixels for the space between the image and the surrounding text.
3. In **Border** , add a value in pixels for the image border.
4. Click **Update** to save your changes.

Advanced



By selecting the **Advanced** tab, the following functions are available:

Swap Images

Under **Swap Images** you have the following options:

1. Select **Alternative image** to add different images for **mouse over** and/or **mouse out**. For best results, these images need to have the same size proportions in pixels.
2. Browse to select the desired images in the File Manager.
3. Click **Update** to save your changes.

Miscellaneous

Under **Miscellaneous** you have the following options:

1. In **ID**, you can set a unique identifier for the image. The ID can be referenced by style sheets or by a java script providing additional functionality.
2. In **Language direction**, you can set the language direction (left to right or right to left) for the description, title and other text attributes specified for the image.
3. In **Language code**, set the desired language, for example, if you have an image showing content in a different language than the actual page. Enter the standard language code format, for example it (Italian), es (Spanish), en (English) etc.

4. In **Image map** you can associate an image map with the image. Image maps are used to map certain areas of an image to links or other actions. There is currently no built-in way to create image maps in TinyMCE.
5. In **Long description link**, type a link to provide a longer image description than what fits in the description field. Note that most visual browsers do not support this feature, this is primarily an accessibility feature.
6. Click **Update** to save your changes.

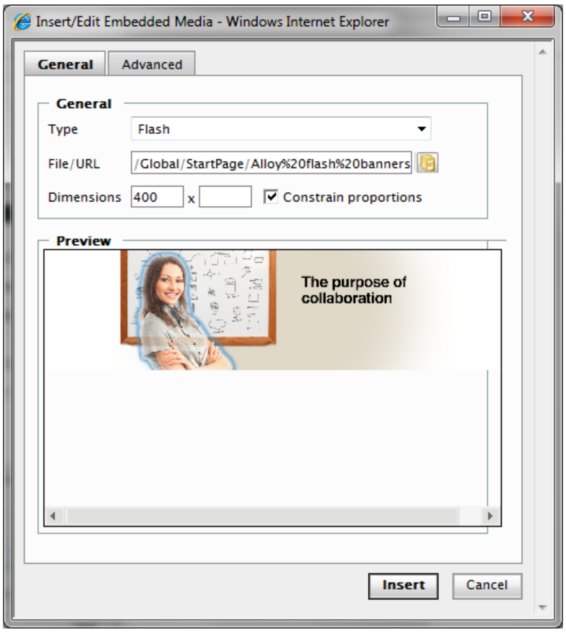
Inserting Embedded Media

You can insert embedded media into your web pages, such as video or Flash animations. Just as with images, the embedded media must be available in the File Manager to be able to link to the media file. The most common file formats are supported in a standard installation ofEPiServer CMS. For a detailed description of other formats such as Quicktime, Shockwave, Windows Media and Real Media, please refer to available accessibility coding standards.

> Depending which type of media you select on the **General** tab, the attribute options will vary on the **Advanced** tab. For a more detailed description of Flash movie attributes, please refer to available accessibility coding standards.

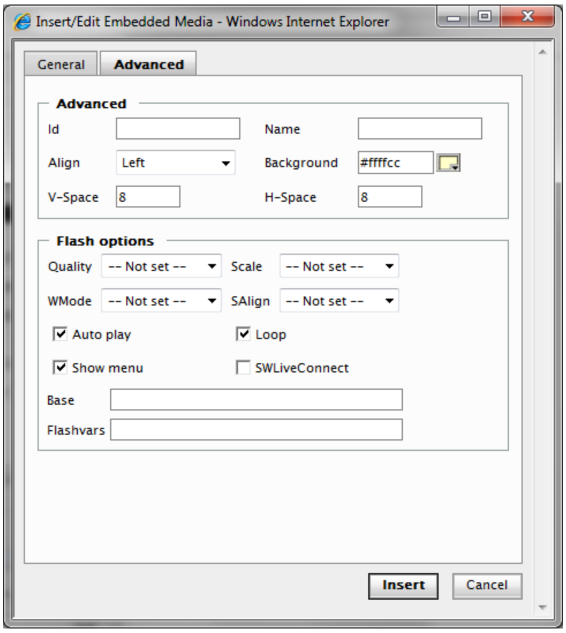
Insert embedded media as follows:

1. Place the cursor in the editor area where you want to insert your image.
2. Click the **Insert/edit embedded media image** button  on the editor toolbar.



3. In **Type**, select the type of media and associated format, for instance Flash, Quicktime or Windows Media. Flash is selected by default.
4. In **File/URL**, browse to select the media file in the File Manager.
5. In **Dimensions**, set the dimensions of the movie in pixels. Ensure that **Constrain properties** is selected to keep the proportions of the movie.
6. Click **Insert** and the media will be linked into the page.

Advanced Settings for Embedded Media



By selecting the **Advanced** tab, you can work with advanced media settings (background color, alignment and options for the display of media) as follows:

Advanced options

1. In **ID**, you can set a unique identifier for the media. The ID can be referenced by CSS style sheets or by a JavaScript providing additional functionality.
2. In **Align**, position the display of the media on the page.
3. In **Background**, select a background color for the media by using the following options: **Picker**, **Palette** or **Named**.
   Click **Apply** to apply the background.
4. In **V-Space** and **H-Space**, enter the horizontal and vertical space in pixels to surrounding objects.
5. Click **Update** to save your changes.

Flash options

1. In **Quality** , set the quality for the Flash movie to display. Specifies how to prioritize play-back speed and appearance.
2. In **Scale** , set the scale to specify how the movie should adapt when displayed in a spe-cified area.
3. In **WMode**, set the Window Mode property of the Flash movie for transparency, layering, and positioning in the browser.
4. In **SAlign**, specify how the movie should align in the browser window.
5. Selecting **Auto play** will make the movie to be played automatically when the page is opened.
6. Selecting **Loop** will make the movie to repeat indefinitely or stop when it reaches the last frame.
7. Selecting **Show menu** will make the menu to be displayed.

8. Selecting **SWLiveConnect** will make the browser to start Java when loading the Flash Player for the first time.
9. In **Base** , specify a base directory or URL used to resolve all relative path statements in the Flash Player movie. This attribute is helpful when your movies are kept in a different directory from your other files.
10. In **Flashvars** , set the root level variables to be sent to the movie.
11. Click **Update** to save your changes.

Adding Links

On a web page, you can insert links to the following:

- Content on the website
- Documents
- E-mail addresses
- Images

You can also *create anchor links*, which is hypertext links to a specific section on a web page.

> For accessibility reasons (for example, people who are visually impaired) it is important to describe the link in words by typing a text in the **Link title** box.

Linking to Content

When you edit a page or block, you can link to another page on your website. However, you cannot link to blocks since they do not have a web address. About how to insert pages and blocks on a page, see *Using Shared Content on a Page*.

You have the following options to link to a web page:

Linking to a Page on Your Website through Drag and Drop

Create a link to a web page on your website as follows:

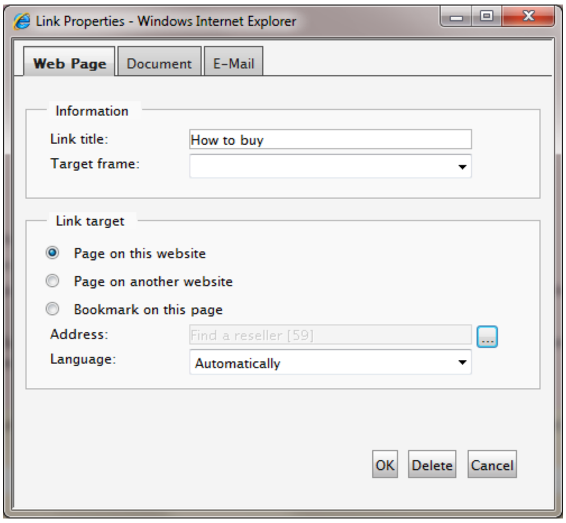
1. Open the page in the editor area you want to insert the link to.
2. Select the page in the tree structure you want to create a link to.
3. Drag the page to your page in the editor area and drop it where you want it.
4. Save your changes.

> ***Tip*** Another way to link to your content is to use drag and drop pages and blocks as described in *Using Shared Content on a Page*. This kind of content can contain links to pages on your website.

Linking to a Page on Your Website

Create a link to a web page on your website as follows:

1. Select the text that will form the link.
2. Select **Insert/edit link**. In the window, keep the **Web Page** tab active.



3. In **Link title**, type the text that will be shown as a tooltip to the link.
4. In **Target frame**, select how the link is to be opened. If nothing is selected here, the link will open in the same window.
5. Select **Page on this website** as the link target.
6. In **Address**, browse the page you want to link to.
7. Select the page you want to link to in the tree structure, click **Select**.
8. If you are using multiple languages on your website, you can select language for the page. Under **Language** you can select which language version of the page will be shown. Select the language from the list, or select the **Automatic** option. If you choose the latter option, which is most common, the visitor is automatically directed to the language version they are using.
9. Click **OK**.

If you have trouble finding the page you want to link to, you can use the search function at the top of the dialog. Enter the entire or part of the page's name or the page's ID number and select **Search**.

Linking to Language Versions

If you have a globalized website with several languages, you might want that the visitor is directed to the language version that you have decided. The most common is that the visitor selects a language on the website and is automatically directed to the chosen language version.

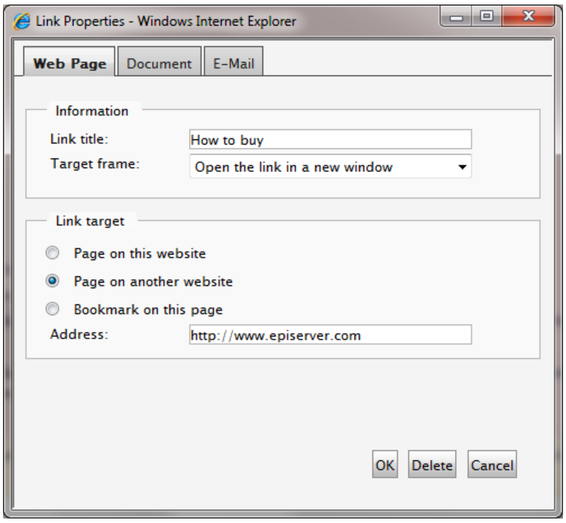
Create a link to a web page with language versions on your website as follows:

1. Open the page and select the content you want to link to the page with language versions, by following points 1–7 of the instruction in *Linking to a Page on Your Website*.
2. Under **Language** you can select which language version of the page will be shown. Select the language from the list, or select the **Automatic** option.

Linking to a Page on Another Website

Create a link to a web page on another website as follows:

1. Select the text that will form the link.
2. Select **Insert/edit link**. In the window, keep the **Web Page** tab active.



3. In **Link title**, type the text that will be shown as a tooltip to the link.
4. In **Target frame**, select how the link is to be opened. For external links, it is recommended that you open the page in a new window.
5. Select **Page on another website** as the link target.
6. In **Address**, enter the address of the website you want to link to.
7. Click **OK**.

Linking to Documents

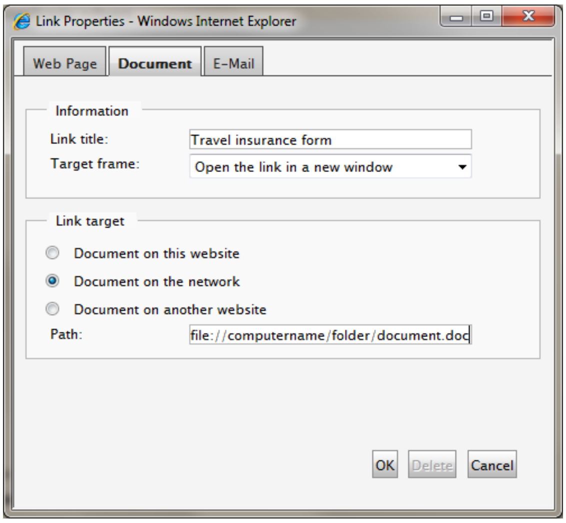
You can create links to documents on the website (available in the File Manager), documents on a file server or to documents on another website. You can link to any type of document formats.

Depending on the type of document, and the settings of the computer from which a link is opened, the behavior will vary. For instance, if you download a Word document and you have Word installed on your computer, the application will be launched and the document will be opened inside Word. If Word is not installed, you will be prompted to save the file. On public web-sites, the PDF file format is often used since these files can be opened and displayed directly in the web browser.

Linking to a Document on the Local Network

Create a link to a document on the local network as follows:

1. Select the text that will form the link.
2. Select **Insert/edit link**. In the window, select the **Document** tab.



3. In **Link title**, type the text that will be shown as a tooltip to the link.
4. In **Target frame**, select how the link is to be opened. Selecting **Open the link in a new window** will cause the document to be opened in a new window.
5. Select **Document on the network** as the link target.
6. In **Path**, specify the path to the file you want to link to. Enter the complete path with the computer name, and the entire folder path ending with the file name, including the file extension.
7. Click **OK**.

Linking to a Document on Your Website – Drag and Drop

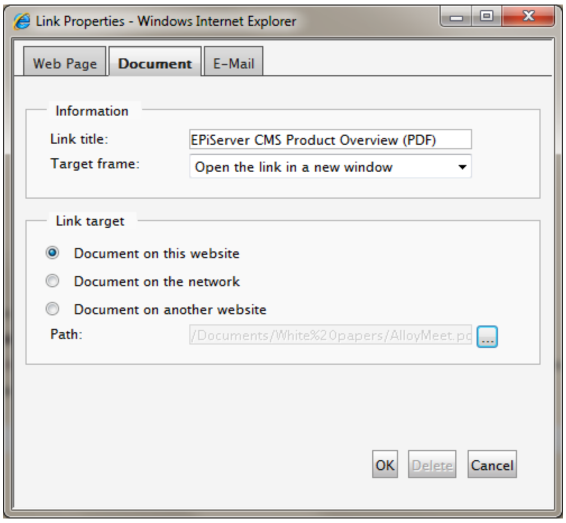
Instead of using the **Insert link** button in the editor toolbar, you can create document links simply by dragging and dropping documents directly from the File Manager to a page as follows:

1. Edit the page with the File Manager open.
2. Select the document you want to insert, drag and drop it where you want it on the page. The document file name will form the link text, you can change this later if you want.
3. To change the link properties, open the **Link Properties** dialog box by selecting the link and clicking the **Insert/edit link** button in the toolbar.
4. Click **OK**.

Linking to a Document on Your Website – File Manager

Create a link to a document on your website as follows:

1. Select the text that will form the link.
2. Select **Insert/edit link**. In the window, select the **Document** tab.

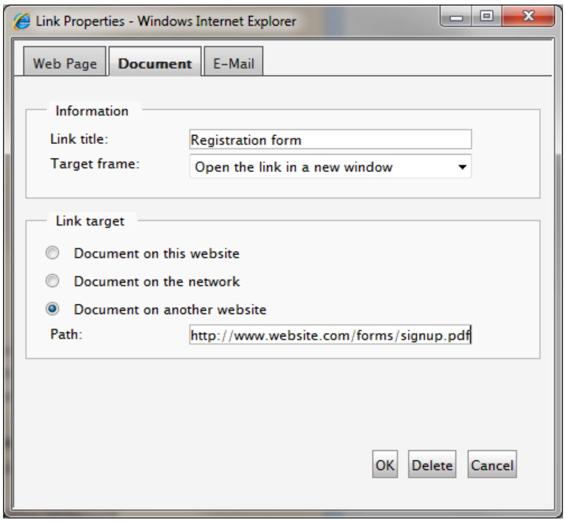


3. In **Link title**, type the text that will be shown as a tooltip to the link.
4. In **Target frame**, select how the link is to be opened. Selecting **Open the link in a new window** will cause the document to be opened in a new window.
5. Select **Document on this website** as the link target.
6. In **Path**, browse the page you want to link to.
7. In the File Manager, browse to the document you want to link to in the folder structure, click **OK** to select the file.
8. Click **OK**.

Linking to a Document on Another Website

Create a link to a document on another website as follows:

1. Select the text that will form the link.
2. Select **Insert/edit link**. In the window, select the **Document** tab.



3. In **Link title**, type the text that will be shown as a tooltip to the link.

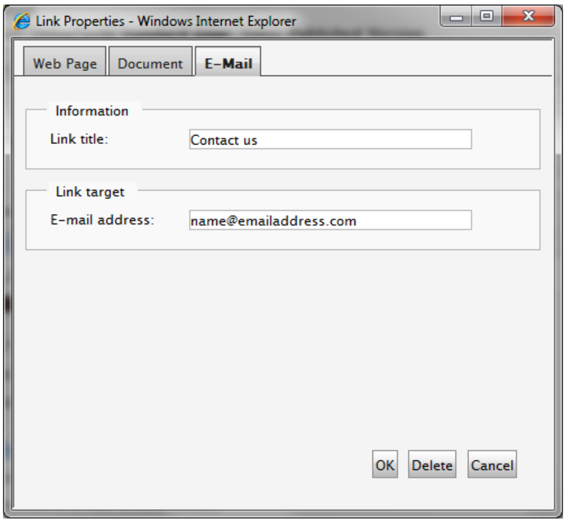
4. In **Target frame**, select how the link is to be opened. Selecting **Open the link in a new window** will cause the document to be opened in a new window.
5. Select **Document on another website** as the link target.
6. In **Path**, specify the path to the file you want to link to. Enter the complete URL to the website where the document is available.
7. Click **OK**.

Linking to an E-Mail Address

Creating a link to an e-mail address gives visitors the option of sending e-mails directly. When a visitor clicks on the link, their e-mail client opens and the address that you have specified is automatically entered in the address field of the e-mail.

Create a link to e-mail address as follows:

1. Select the words that will form the link.
2. Select **Insert/edit link**.
3. In the **Link properties** window, select the **E-Mail** tab.



4. In **Link title**, type the text that will be shown as a tooltip to the link.
5. In **E-mail address**, type the e-mail address to which you want the link to take you.
6. Click **OK**.

Creating Anchors

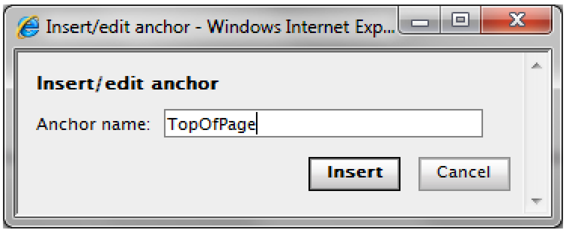
An anchor (also called bookmark) is a link to a place on the same page. Anchors are useful when you have a long text which you want to divide into sections. The reader can then use the links to jump between the sections. A typical example is a table of content where each section is an anchor link.

When adding anchors, you first create the anchor so that you can select it in step two, where you create the link to the anchor.

Step 1: Inserting an Anchor

Insert an anchor on the page as follows:

1. Select the text where you want to place an anchor.
2. Select **Insert/edit anchor** from the editor toolbar.
3. In **Anchor name**, type a name for the anchor. Avoid using any special characters or spaces.

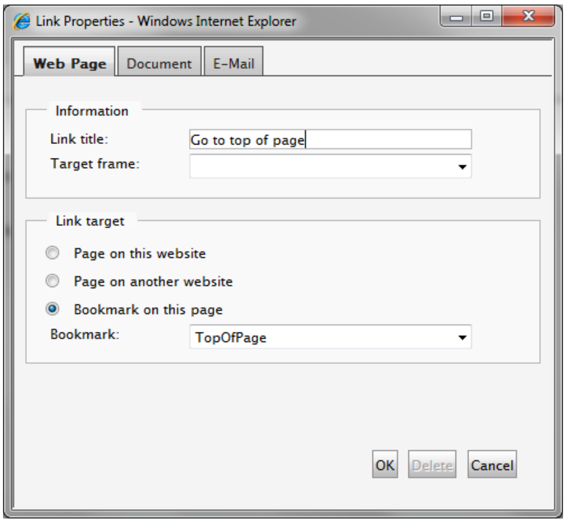


4. Click **Insert**.

Step 2: Adding a Link to Anchor

Create a link to an anchor as follows:

1. Select the text that will form the link.
2. Select **Insert/edit link**. In the window, keep the **Web Page** tab active.



3. In **Link title**, type the text that will be shown as a tooltip to the link.
4. In **Target frame**, select how the link is to be opened.
5. Select **Anchor on this page** as the link target.
6. In **Anchor**, select the anchor to which you want to link (all the anchors on the page are listed).
7. Click **OK**.

Changing Anchor

1. Select the anchor you want to edit.
2. Select **Insert/edit anchor** from the editor toolbar.
3. In **Anchor name**, edit the anchor text.
4. Click **Update**.

Deleting Anchor

1. Select the anchor you want to delete.
2. Press **Delete** on your keyboard.
3. Update links that are pointing to the anchor that has been deleted.
4. Click **Save and Publish** .

Creating a Link from an Image

You can create a link from an image, for example, to another web page. You can also create thumbnail images and link them to display the images in a bigger size. Create a link from an image as follows:

1. Select the image you want to link to.
2. Select **Insert/edit link**.
3. The **Link Properties** dialog box appears with the **Web Page** tab active. Depending on the type of link you want to create, select the appropriate tab **Web Page**, **Document** or **E-mail**.
4. In **Link title**, enter the text that will be shown as a tooltip to the link.
5. In **Target frame**, select how the link is to be opened. For external links, it is recommended that you open the page in a new window.
6. In **Link target**, select the type of link you want and enter the required information.
7. Select **OK**. The link will be added to the image.

Adding Tables

Tables are used for organizing data in rows and columns to get a better overview of the information. When you insert a table, you select the number of rows and columns for the table. You can also define the appearance of the table, either by setting the properties manually or preferably using predefined CSS table classes.

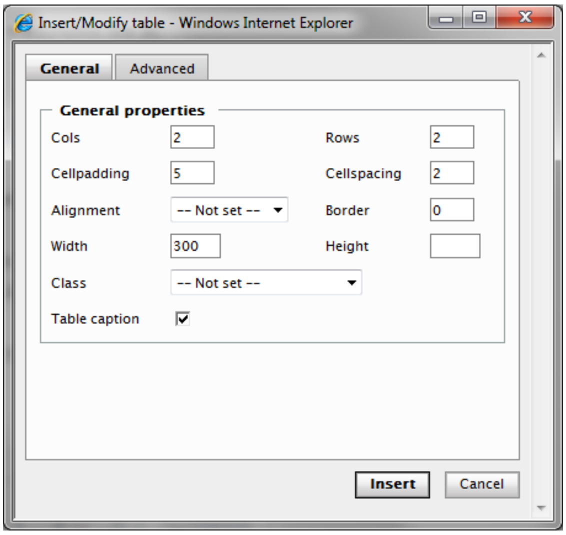
Predefined CSS table classes will ensure that the tables will have a uniform appearance on the website, and this also the easiest way to format tables. Check with your system administrator to find out what applies for your website.

Creating a Table

Create a table as follows:

1. Place the cursor where you want to insert your table.

2. Click the **Inserts a new table** toolbar button to open the **Insert/Modify table** dialog box. Under the **General** tab you can work with general settings for the table.

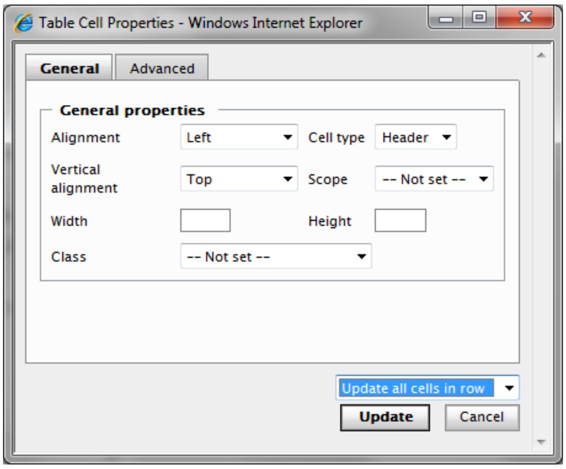


3. In **Cols** and **Rows**, set the number of columns and rows.
4. In **Cell padding**, you can define the space in pixels between the text in the cell and the cell borders. This is only necessary if you do not use a CSS class for table formatting.
5. In **Cell spacing**, you can define the space in pixels between the cells in the table. This is only necessary if you do not use a CSS class for table formatting.
6. In **Alignment**, you can define the position of the table, in case the table width does not take up the entire available space.
7. In **Border**, you can set the weight of the table border in pixels. Use this option if you want a table border and are not using CSS classes to format your table. Default value is zero.
8. In **Width**, you can set a fixed width for the table in pixels. If you do not specify a value here, the width of the table will adapt to the content using the full available space.
9. In **Height**, you can set a fixed height for the table in pixels. Most often the height of the table is controlled by the content, allowing the table to expand downwards.
10. In **Class**, you can specify a preset formatting to use for the table. Select an appropriate CSS table class from the drop-down list.
11. In **Table caption**, select to insert a table caption space for the table. The table caption allows you to enter a table heading above the table.
12. Click **Insert** to insert the table into the page. Continue by entering the table data into the table cells. You can move between the table cells using the arrow keys or the tab key.
13. When you are done, save the page.

Formatting the Table Header

To format the table correctly, you need to define the **header** of the table. For accessibility reasons, it is important to separate header cells from data cells when the table data is interpreted. You can format the header row manually by applying for instance bold formatting to the header row text, but this will result in an incorrect formatting of the table.

1. Open the table for editing and place the cursor in the first header row.
2. Select **Table cell properties** in the Toolbar.



3. In **Cell type**, select **Header** from the list. This will result in a <th> HTML tag for the header cell.
4. In **Scope**, select **Column** from the list to set the header for the entire column.
5. Select **Update all cells in a row** in the drop-down list to apply the same properties to all table cells in the header row.
6. Click **Update** to update the information for the table.
7. Save your changes. If you use CSS classes for formatting tables, you may see that table header is now updated with a specific header formatting.

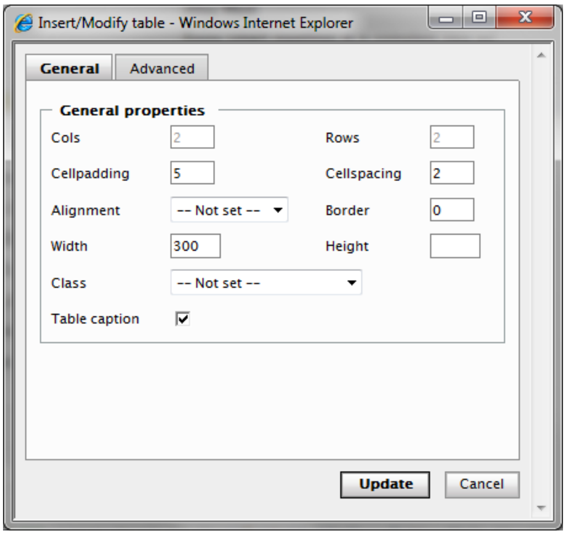
Deleting a Table

To delete a table, place the cursor in a table cell and select the **Delete table** toolbar button.

Table Properties

Once you have created a table you can change it and tailor it to your requirements. In the **Insert/Modify table** properties dialog box you will work with properties that affects the entire table such as the size of the table and its position on the page. The **Insert/Modify table** dialog box has the **General** and the **Advanced** tabs. When you have done your changes to the table, click **Update** to save the changes.

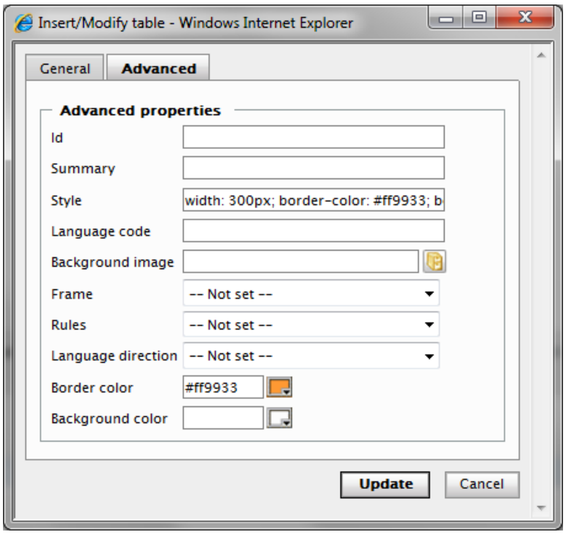
General Tab



The **General** tab contains the following boxes:

- **Cols/Rows**. Set the number of columns and rows in the **Cols** and **Rows** fields.
- **Cell padding**. Define the space in pixels between the text in the cell and the cell borders. This is only necessary if you do not use a CSS class for table formatting.
- **Cell spacing**. Define the space in pixels between the cells in the table. This is only necessary if you do not use a CSS class for table formatting.
- **Alignment**. Define the position of the table, in case the table width does not require the entire space available. Select **Center**, **Left** or **Right**.
- **Border**. Set the weight of the table border in pixels. Use this option if you want a table border and are not using CSS classes to format your table. Default value is zero.
- **Width**. Set a fixed width for the table in pixels. If you do not specify a value here, the width of the table will adapt to the content using the full available space.
- **Height**. Set a fixed height for the table in pixels. Most often the height of the table is controlled by the content, allowing the table to expand downwards.
- **Class**. Select an appropriate CSS table class from the drop-down list.
- **Table caption**. Insert a table caption space for the table so you can type a table heading above the table.

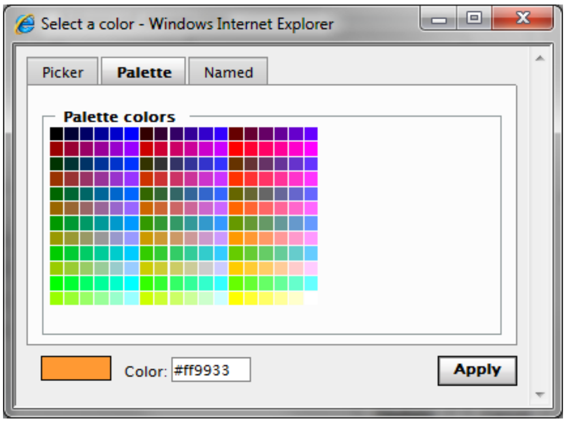
Advanced Tab



The **Advanced** tab contains the following boxes:

- **ID**. Type the ID number for the table for accessibility purposes.
- **Summary**. Type a description of the table content for accessibility purposes.
- **Style**. View the current settings for the table. This option can be used to set style attributes, overriding values specified in CSS classes. Normally you should use CSS classes, but if you want to apply a special style settings only used on this element, you can use this option.
- **Language code**. Define a language here if the content of the table is in a different language than the rest of the page. Enter the standard language code format, for example it (Italian), es (Spanish), en (English) etc.
- **Background image**. You can select a background image to be applied to the entire table. Click the **Browse** button to the right of the field to select an image in the File Manager. Click **OK** to add the image to the table.
- **Frame**. Specify which parts of the **outside** borders that should be visible. Refer to accessibility programming standards for explanation of the attribute values.
- **Rules**. Specify which parts of the **inside** borders that should be visible. Refer to accessibility programming standards for explanation of the attribute values.
- **Language direction**. Define the language direction for the table, if this is different for what applies to the page.
- **Border color**. Select a border color for the table. You can select colors using the options **Picker**, **Palette** or **Named**, depending on your preferences. Click **Apply** to add the color

selection to the table.



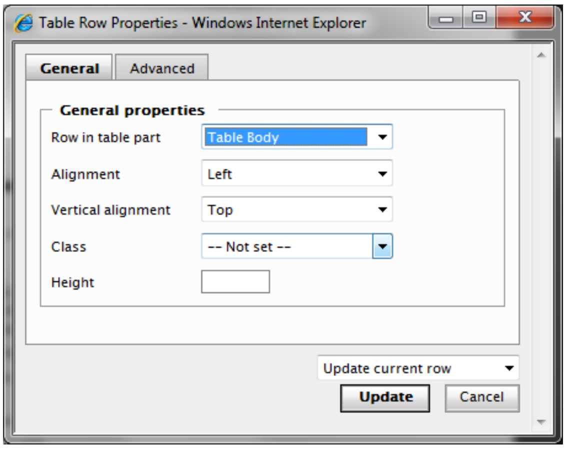
- **Background color**. Select a background color for the table.

> ***Note*** If you are using predefined CSS classes to format tables, rows or cells, be aware that additional formatting added “manually” on top of the predefined formatting, may be overridden and will not apply.

Table Row Properties

In the **Table row properties** dialog box you can control settings that will apply to a specific row of a table. For instance, if you want to apply red background color to certain rows in a table, you will use the **Table row properties** dialog box. This dialog box has two tabs, the**General** tab and the **Advanced** tab. When you have done your changes to a table row, click **Update** to save the changes.

General Tab

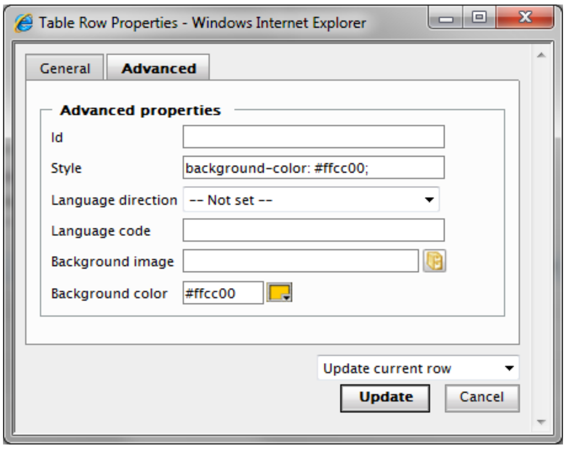


The **General** tab contains the following boxes:

- **Row in table part**. Set the number of columns and rows in the **Cols** and **Rows** fields.
- **Alignment**. Define the position of the text in the cells of the table row.
- **Vertical alignment** . Define the vertical position of the text in the cells of the table row.
- **Class**. Select an appropriate CSS table class from the drop-down list.
- **Height**. Define a specific height in pixels for a specific row of a table.
- **Update current row**. When you make changes to table rows, you can decide where to apply the changes:

- Update current row (the selected row)
- Update odd rows in table
- Update even rows in table
- Update all rows in table

Advanced Tab



The **Advanced** tab contains the following boxes:

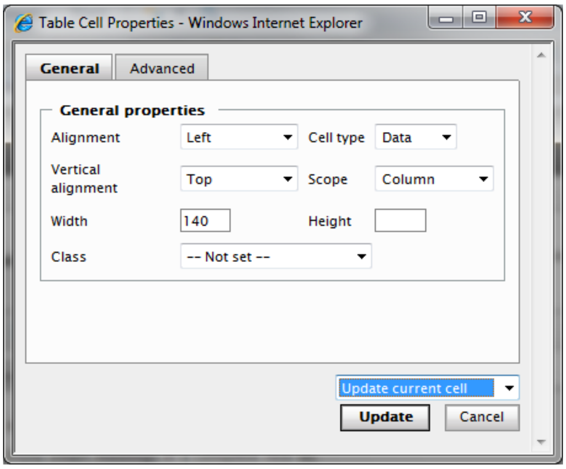
- **ID**. Type the ID number of the table row for accessibility purposes.
- **Style**. View the current settings for the table row. This option can be used to set style attributes, overriding values specified in CSS classes. Normally you should use CSS classes, but if you want to apply a special style settings only used on this element, you can use this option.
- **Language direction**. Define a language direction here if this is different from the rest of the table.
- **Language code**. Define a language code here if the content of the table row is in a different language than the page. Enter the standard language code format, for example it (Italian), es (Spanish), en (English) etc.
- **Background image**. Select a background image to be applied to a table row. Click the **Browse** button to the right of the field to select an image in the File Manager. Click **OK** to add the image to the table row.
- **Background color**. Select a different background color for a table row. You can select colors using the options **Picker**, **Palette** or **Named**, depending on your preferences. Click **Apply** to add the color selection to the table.

> ***Note*** If you are using predefined CSS classes to format tables, rows or cells, be aware that additional formatting added “manually” on top of the predefined formatting, may be overridden and will not apply.

Table Cell Properties

In the **Table cell properties** dialog box you can control settings that will apply to a specific cell of a table. For instance, if you want to apply a yellow background to a certain cell in the table, you will use the **Table cell properties** dialog box. This dialog box has two tabs, the**General** tab and the **Advanced** tab. When you have done your changes to a table row, click **Update** to save the changes

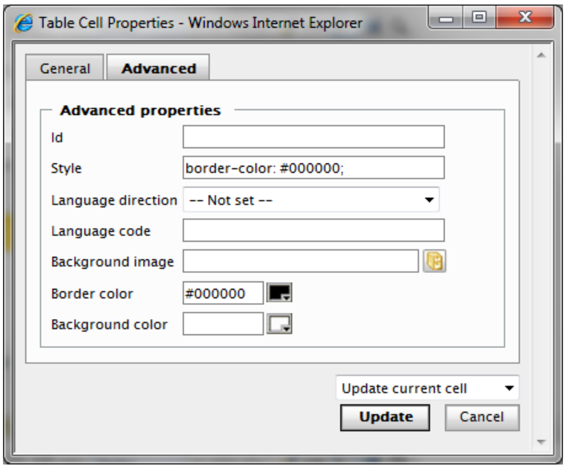
General Tab



The **General** tab contains the following boxes:

- **Alignment**. Defines the position of the text in the cell.
- **Vertical alignment** . Defines the vertical position of the text in the cells of the table row.
- **Cell type**. Define if the content in the cell is *data* or belongs to a *header*, select option **Data** or **Header**. This is used for applying correct formatting to a table, but also for accessibility purposes.
- **Scope**. Define wether the cell is a *row* cell or a *column* cell, for those cells that are columns headers or row headers for accessibility purposes.
- **Width**. Define a fixed width in pixels for a specific cell in a table.
- **Height**. Define a fixed height in pixels for a specific cell in a table.
- **Class**. Select an appropriate CSS table class from the drop-down list.
- **Update current cell**. When you make changes to table cells, you can decide where to apply the changes:
  - Update current cell (the selected cell)
  - Update all cells in a row
  - Update all cells in table

Advanced Tab



The **Advanced** tab contains the following boxes:

- **ID**. Type the ID number for the table cell for accessibility purposes.
- **Style**. View the current settings for the cell. This option can be used to set style attributes, overriding values specified in CSS classes. Normally you should use CSS classes, but if you want to apply a special style settings only used on this element, you can use this option.
- **Language direction**. Define a language direction for the cell here, if this is different from the rest of the table.
- **Language code**. Define a language code here if the content of the table cell is in a different language than the rest of the table. Enter the standard language code format, for example it (Italian), es (Spanish), en (English) etc.
- **Background image**. Select a background image to be applied to a table cell. Click the **Browse** button to the right of the field to select an image in the File Manager. Click **OK** to add the image to the cell.
- **Border color**. Select a border color for the cell. You can select colors using the options **Picker**, **Palette** or **Named**, depending on your preferences. Click **Apply** to add the color selection to the table.
- **Background color**. Select a background color for the cell.

> ***Note*** If you are using predefined CSS classes to format tables, rows or cells, be aware that additional formatting added “manually” on top of the predefined formatting, may be overridden and will not apply.

Changing the Number of Rows and Columns

Using the editor toolbar buttons you can change the number of rows, columns and cells in a table by inserting and deleting rows and columns.

Insert and Delete Columns. Insert columns before and after a selected column, and you can also delete a selected column.

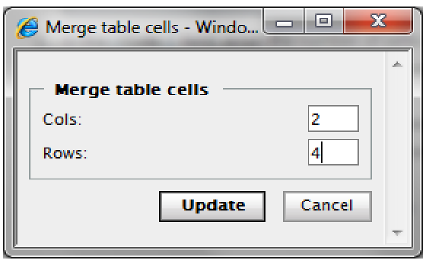
Insert and Delete Rows. Insert rows before and after a selected row, and you can also delete a selected row.

Merging and Splitting Cells

Using the editor toolbar buttons you can merge and split cells in a table. This can be useful if you want to reorganize the data or create more complex table structures.

Merging Cells

1. Open the table for editing, put the cursor in one of the cells that you want to merge. This will be cell number one in relation to the cells that will be merged.
2. Select **Merge table cells** .



3. In **Cols**, type the number of cells you want to merge. For instance 2 if you want to merge two cells. You can merge any number of cells as long as the cells are next to each other in the table. The merge will occur to the right of the selected first cell.
4. In **Rows**, type the number of rows where you want to merge the cells. For instance 4 if you want to merge two cells on the nearest four rows. The merge will occur downwards counting from the first selected cell.
5. Click **Update** to merge the cells.

Splitting Cells

1. Open the table for editing, put the cursor in the cell you want to split. Note that you can only split cells that have previously been merged.
2. Select **Split merged table cells** .

Editing Content Settings

Your content can have metadata and other non-visible settings for editing. The **Forms Editing** view has a set of tabs already set up for each page type and block type in a standard installation. Here you can access all editorial functions and properties in a forms view.

The Forms Editing view is customizable. Contact your system administrator to find out what is applicable to your website.

To use the Rich-Text Editor, see *Basic Editing*.

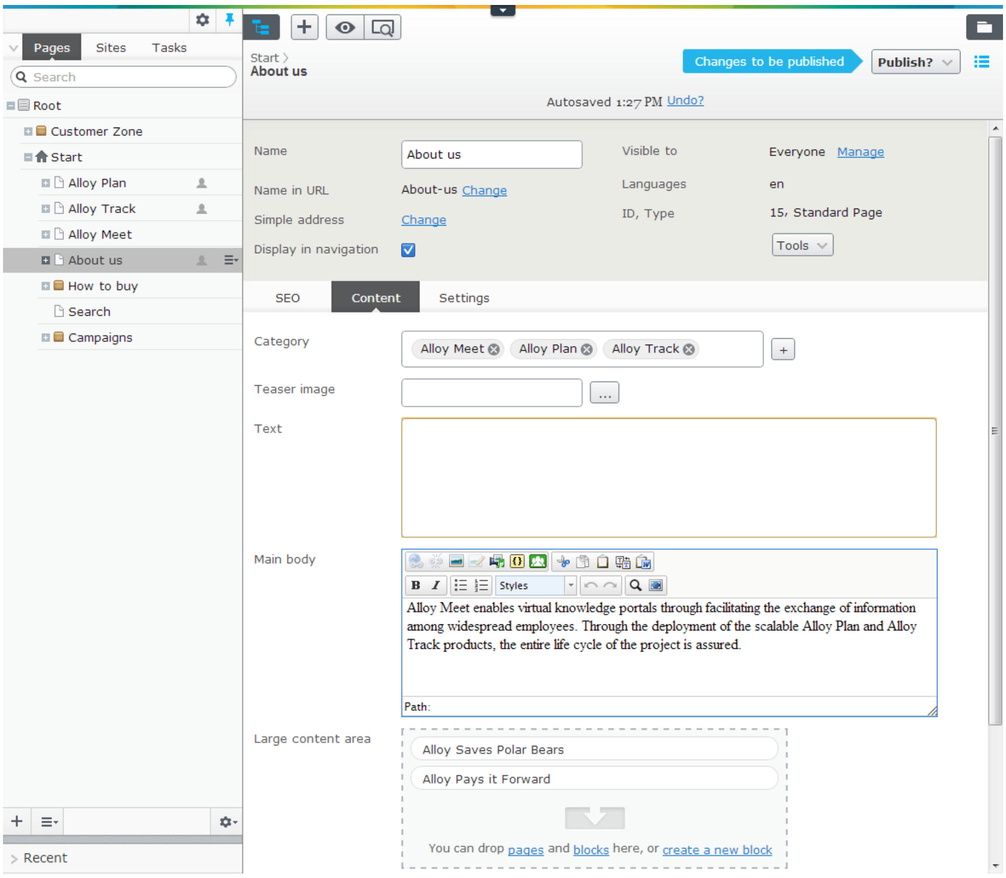
You have the following options:

 **Content settings**. Toggle to access all editing functions on and off for the page or block in a form view as described in *Editing Content Settings*.

 Click to add, for example, a category.

 Click to browse, for example, a form.

 Click to remove, for example, a category.



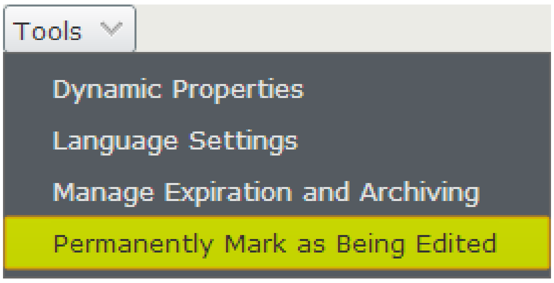
Header Information

In the header you can view the following detailed information of the content:

- **Name**. Required (you cannot leave it blank). **Name**. Type the name of the page you create here. This is the name that the page will have as the heading at the top of the page, and is shown in the tree structure and menus.

- **Name in URL**. The **Name in URL** applies solely to pages, and only needs to be used if you have chosen to use web addresses that reflect the website's structure. Then the addresses in the address field will follow the structure of the website. If you provide an address in **Name in URL**, EPiServer CMS will automatically create an address based on the name you have given the page. If you think it is too long and complicated, you can create a name for the page yourself.
  It is possible to change the name afterwards, but bear in mind that a lot of people may have created a link to your page, and they will not work anymore if you change the name. If you change the name of the page, the field and links to the page are not affected.
- **Simple address**. When pages are linked in EPiServer CMS, they are assigned an address that can prove difficult to remember and which you may want to avoid using in a marketing context. **Simple address** allows you to create a link so that visitors can access the page using an understandable address. If, for example, you enter /products in the field, visitors can enter http://www.company.com/products in the address bar of their browser and jump straight to this page.
  By clicking **Change** you can add a simple address. This function also works if you enter the name of the page after the website address. For example, if you have a page called "News", you can enter http://www.company.com/news and come to the right page without having to enter a simple address. EPiServer CMS first searches pages that have a simple address. If it does not find a page with that address it will search on the name of the page. If several pages have the same name, the page found first will be displayed.
- **Display in navigation**. You do not always want all the pages on a website to be included as options in the menu. If you clear the **Display in navigation** check box, the page will not be visible in the navigation menu. This function may be suitable for forms or other pages that do not need to be present in menus but are instead accessed through links from other pages.
- **Visible to**. You can see the access level settings for the content. By clicking **Manage** you can change these settings as described in *Setting Access Rights*.
- **Languages**. You can see the language settings for the content and manage them if globalization has been activated on your website, see *Defining Language Settings*.
- **ID, Type**. Shows the unique ID number and content type used.

Tools



Dynamic Properties

Using the **Edit dynamic properties** tool, it is possible to customize functions in the website so that they apply to a particular page and its subpages. Using dynamic properties, you can store a property on one or more pages simultaneously. The dynamic properties available vary, depending on the customization of the website.

Select **Dynamic Properties** to open the **Edit Dynamic Properties on Page** window for the current page.

For example, you can set the standard search words that are to apply for a page. This is used to make it easier for search engines to find the page and index in the most appropriate way. These search words may need to be different depending on which page they relate to. The page about our products should perhaps have different search words from the page containing contact details. By entering a few search words and selecting **Save**, you can store search words for the page. If the check box beside the field is selected, the search words you have specified are also saved for all the subpages below the page you have selected.

To find out which values apply to a particular page, you can point to the various symbols by the input box under dynamic properties and find out about the value by means of help texts.

*****	The property in this field is defined on the page you have selected and is displayed in the field.
?	The property in this field has no value.
^	The property in this field is defined on an overlying page. The value is shown in a help box by pointing at the symbol. The number of the page where the property is stored is shown in square brackets and after this the stored value is displayed.

Dynamic properties are always stored on the page that you have selected and all its subpages. If you have other values stored on one of the subpages, you can choose to retain them or overwrite these values with what you are now going to store. By selecting the check box to the left of the input field, you are writing over any other possible values on subpages. If you want to retain the values on the subpages, leave the check box blank.

Language Settings

You can see the language settings for the content and manage them if globalization has been activated on your website, see *Defining Language Settings*.

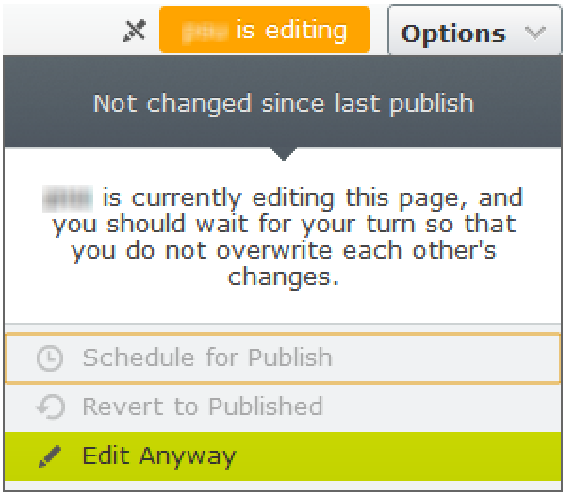
Manage Expiration and Archiving

Normally pages never expires, but if you want to stop the page of being published at a specific date and time, select **Manage Expiration and Archiving**, see *Setting a Date to Stop Content of Being Published*.

Permanently Mark as Being Edited

As soon as you start editing a page or block, it is automatically set to as currently being edited to avoid the risk of version conflicts. You can also keep the markup for the content as currently being edited even if you stop editing it or log off manually. Then you can see if there is someone else working on a page, because all pages that are manually set to as currently being edited automatically appear with the symbol in the tree structure including a tooltip that displays who is editing these pages.

If somebody else tries to edit the page you are working on, a notification will warn that this page is currently being edited. If that person decides to continue to work with the page by clicking **Edit Anyway**, a new page version will be created.



Under **Tools**, manually set the page you are working with as being edited as follows:

Enabling: Select **Permanently Mark as Being Edited**.

Disabling: Toggle **Permanently Mark as Being Edited** to clear the check mark symbol.

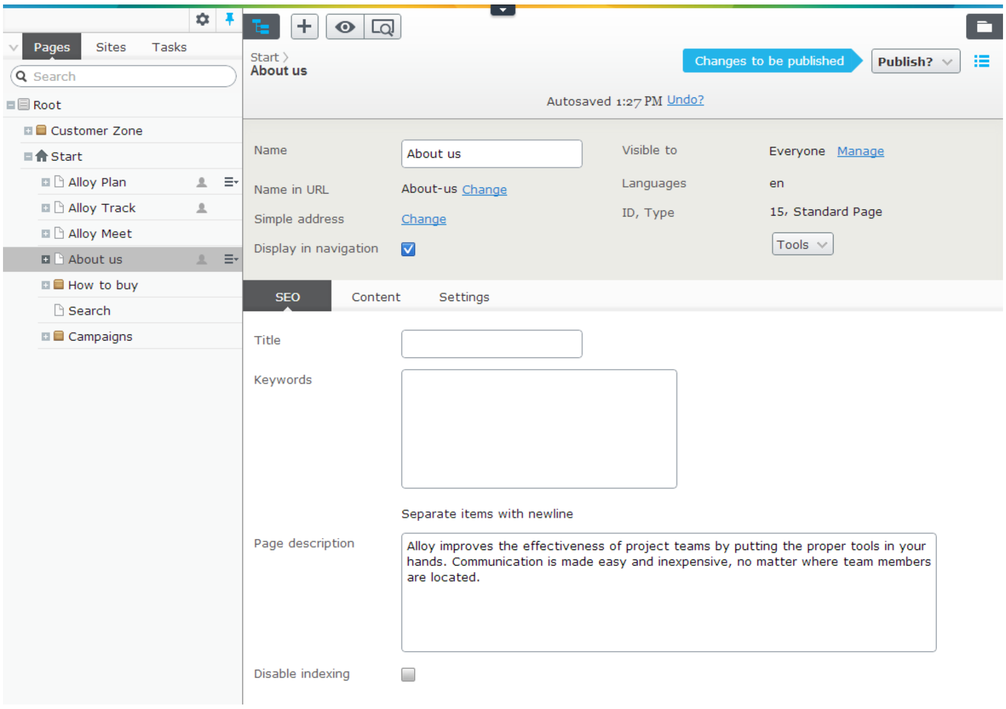
Permanently mark content as being edited will not disappear until you manually disable it.

The system administrator can run a scheduled job according to the configured time interval and the setting will be inactive and disappear from the tree structure. This job will not remove the manually set markups.

Tab Bar and Content

For a description of the example website, see *Sample Site and Templates*. Depending on how your website is configured, the **content settings** view has the following tabs and properties on a **standard page** in a standard installation:

SEO

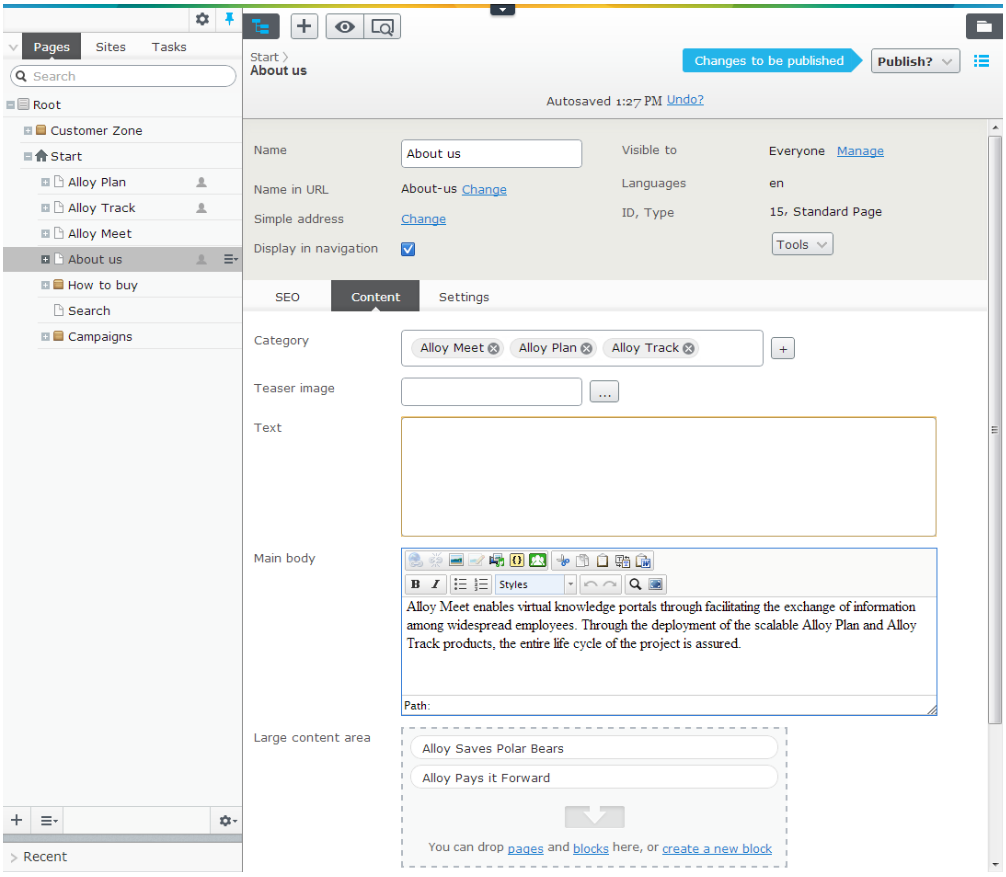


The sample site and templates gives an example on the **SEO** tab how you can provide the following meta tag information to be used by the search engines:

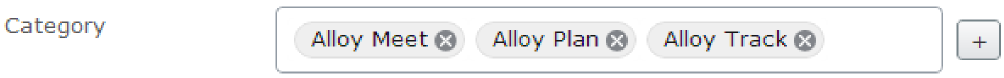
- **Title**. Type the title of the page to be indexed and shown as a link on the SERP by the search engines. If you do not type anything here, the system generates a name based on the page name and website name.
- **Keywords**. Type the metadata keywords for search engine optimization.
- **Page description**. Type the introducing text to be indexed and shown under the link on the SERP by the search engines.
- **Disable indexing**. Select to disable the page from being indexed by the search engines.

Content

The system administrator can add standard values for the different fields. For example, it may mean that the heading field is already filled in, or perhaps that the date for publishing is shown automatically.



- **Category**. Categorization of pages can be very useful, for instance when filtering search information or pages in news listings. The sample site shows products as categories. Categories are displayed as a tree, in which you can expand and collapse the nodes. Selected categories also display a tooltip with the path in the category tree on mouse-over.



Add categories to a page by clicking the button with a plus symbol. In the **Select Categories** window, select each category one by one in the tree. You cannot pick several categories simultaneously by selecting a whole node in the tree. When you are done, click **OK**.
Delete a category by clicking ⊗ for each category in the list.
Categories are created in the administrative interface and applied in the editorial interface, where you can select and apply them to pages.

> ***Note*** Only categories set as **Visible** in the administrative interface will be selectable for editors.

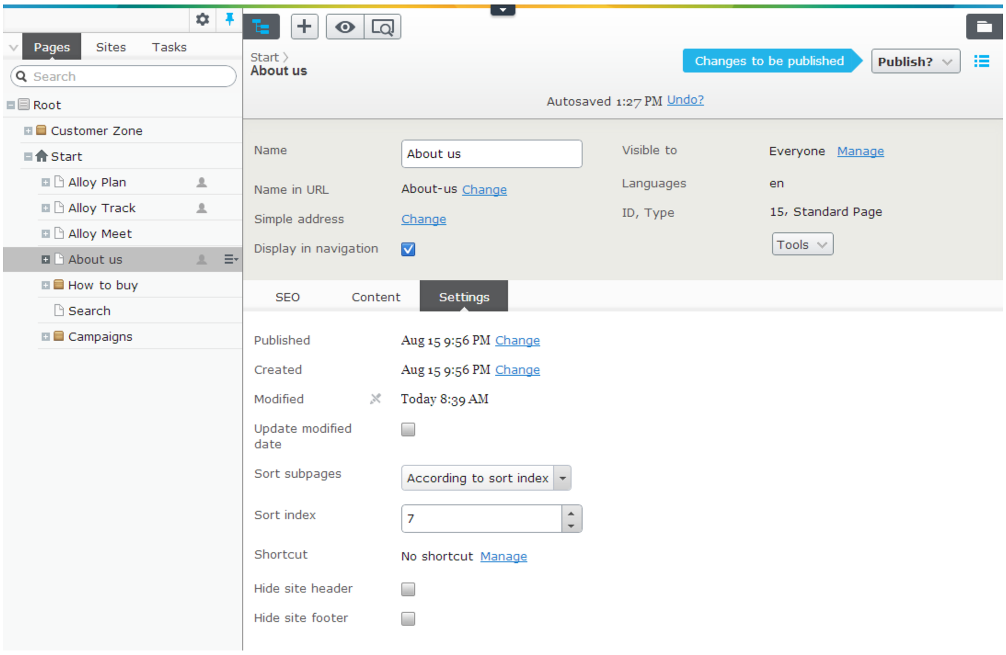
- **Form**. Select a form as described in *Using Forms*.
- **Main body**. In the **Main body** editor area you can work with texts and images, create links and add tables, see *Using the Rich-Text Editor*.

> ***Note*** Not all page types have editor areas.

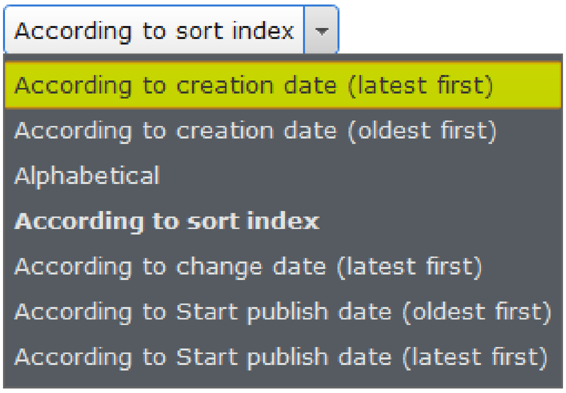
- **Content Areas**. The example template has the editor sections **Large content area** and **Small content area**, where you can drag and drop blocks and other pages, see *Using Shared Content on a Page*.

Note Not all page types have content areas.

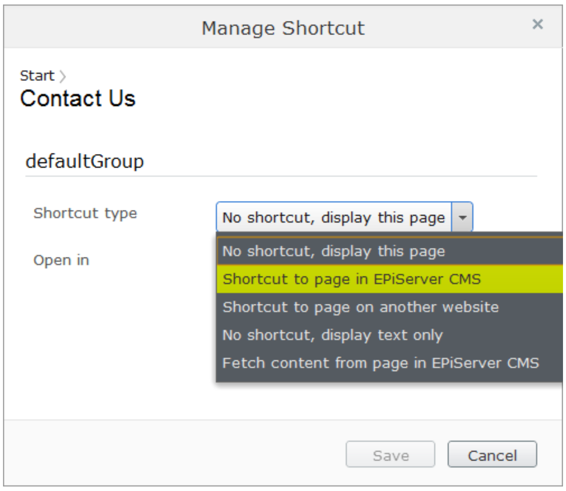
Settings



- **Published**. A system-generated timestamp that shows when the content last was published. By clicking **Change** you can select another date.
- **Created**. A system-generated timestamp that shows when the page was created. By clicking **Change** you can select another date.
- **Modified**. A system-generated timestamp that shows when the page was last changed.
- **Update modified date**. This option is selected by default, but you can clear it if you do not want the date to be shown for when the content was last updated.
- **Sort subpages**. The sort order specifies how the pages are to be sorted in menus. When you select the sorting order, you control the order of all subpages below the page you are editing. Here, you can either select to sort by the date on which a page was created, changed or published in ascending or descending order. You can also select to sort alphabetically or according to the sorting index you have applied.



- **Sort index**. If you have chosen **According to sort index** as the sort order on a page, you must assign all its subpages a number, index, so that the system understands the order in which the pages should lie. The page with the lowest number is sorted so that it comes at the top of the menu. The standard number for all pages is usually 100. If you create a page that you want placed before other pages in the menu, assign this page a number lower than 100, perhaps 90. If you want it to be sorted after other pages, give it a number higher than 100, such as 110. It is always a good idea to work in at least tens and hundreds in case you should want to enter a page between two others in the future. In this way you can easily add in a page without needing to change the sort index of all the pages. Remember, the sort index is only used when you have chosen **According to sorting index** under **Sort subpages** on the parent page.
- **Shortcut**. With a shortcut you can create different types of links in the menu tree. The difference between shortcuts and ordinary links, is that with the shortcut alternative the page itself becomes a link in the menu structure, and will not display any content of its own. Shortcuts can link to pages on the same website or external sites. Shortcuts can also be set to fetch data from other pages on the same site. With this alternative the visitor will still remain in the same branch of the page tree. **No shortcut** is set by default, but if you want another type of link, click **Manage**.



In **Shortcut type**, select any of the following options:

  - **No shortcut**. Selected by default, which means a link that displays the content you have created. By selecting this, you can also reset the page after using other types of links.
  - **Shortcut to page in EPiServer CMS**. Used for linking to another page on the same website. This then becomes a direct link to the page you select. A visitor who clicks this link will be transferred to the page you have linked to and its associated menus.
  - **Shortcut to page on another website**. Used to link to an external page on the Internet or to a document on the server. Remember to include the whole address, including http://. By clicking the button beside the field, you open the link tool in which you can create links as normal. You can link to documents, e-mail addresses, etc.
  - **No shortcut, display text only**. Used if you want this page only to constitute a heading in the menu and not display any information or link to another page.
  - **Fetch content from page in EPiServer CMS**. The same type of link as **Shortcut to page**. The difference is that instead of being moved to the page you link to, you

retrieve information to the page you are on. The visitor remains on the same page, which also retains the same structure. This function is practical when building cross-structures in a website. You can re-use the same information in several different contexts for example on an intranet, but you only need to maintain it in one place.

- **Open in**. Specify how the link is to be opened. This is primarily useful if you have a website that uses frames. It is also common practice to open external links in a new window.

Setting Access Rights

It is possible to assign visitors different levels of authorization for the website. This means that you can display certain pages to a particular visitor, but hide the same pages from others. If a visitor is not authorized to read a page, this visitor will not see that page in the menu.

To set access rights for a page, begin by selecting the page and then click the **Access Rights** link in the *content settings header*. to open the **Set Access Rights for Page** window for the current page. It works in a similar way for blocks as for pages.

When you open the page, you can see which groups and individuals currently have various access rights for the page in question. By selecting **Add Group** or **Add User** you can display more groups and individuals in the list.

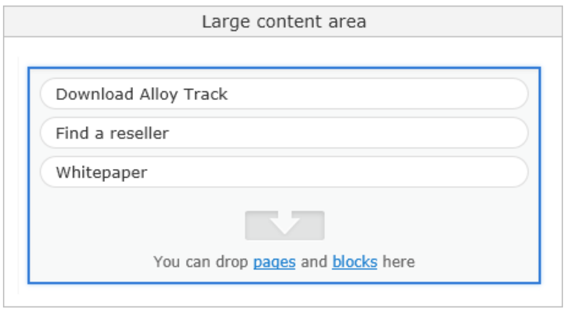
By selecting the check boxes, you can delete or set access rights for various groups and individuals. If the check box is selected, it means that the group or individual is entitled to do what is displayed. If the box is empty, these access rights have been denied. For example, if you do not want the group Everyone to be able to read a specific page, clear the group from the **Read** check box. Once you have assigned the access rights that are to apply for the page in question, select the **Save** button at the top of the window.

Successful actions are confirmed by a feedback message. Otherwise you will receive a notification with a symbol prompting you for action.

Using Shared Content on a Page

You can add pages and pieces of content as **blocks** to reuse them in several ways across your website: on a few selected pages, all pages on the entire website, or even a multi-site environment. These can be used in a very flexible way: for a specific area on all pages (heading and main body), or applied to a specific page type.

Look for the following content area that supports adding pages and blocks:



The flow for creating and managing blocks is similar to creating pages. If you have access rights to edit blocks you only need to update them from one source. You can group these blocks into folders in the block library.

When you edit a page or block, you can link to another page on your website. However, you cannot link to blocks since they do not have a web address.

The following content types are a few examples of how you can use blocks:

- Text, such as teasers and contact information
- Contact forms
- Banners and other images
- Feeds as RSS, Twitter etc

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

For information about the block types that come with a standard installation, see *Sample Site and Templates*.

As for pages, blocks can also have specific versions. For version management of blocks and pages, see *Managing Versions*.

You can also use blocks as personalized content, see *Creating Personalized Content*.

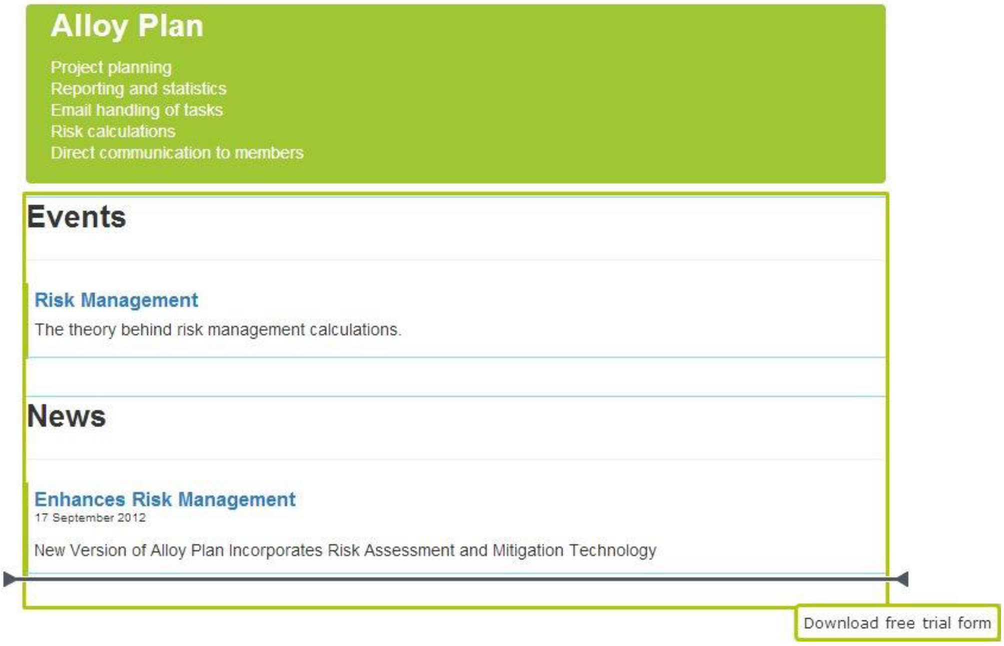
Access rights can be managed from the administrative interface.

Using Blocks on Pages

Adding a Page or Block to a Page

Drag and drop a page or block to a page as follows:

1. Open the page you want to add a block to.
2. Select the block you want to add to your page from the Assets Pane.
3. Drag the block and drop it on any of the highlighted areas of the page.



4. You can add several blocks in the same area. Drag the block above or beneath an already added block, and drop it where you want it when the separator appears.
5. Publish the page as described in *Saving and Publishing Content*.

Add a page on a page through drag and drop as follows:

1. Open the page you want to add a page to.
2. Select the page in the tree structure on the Navigation Pane, drag and drop it on any of the highlighted areas of the page.

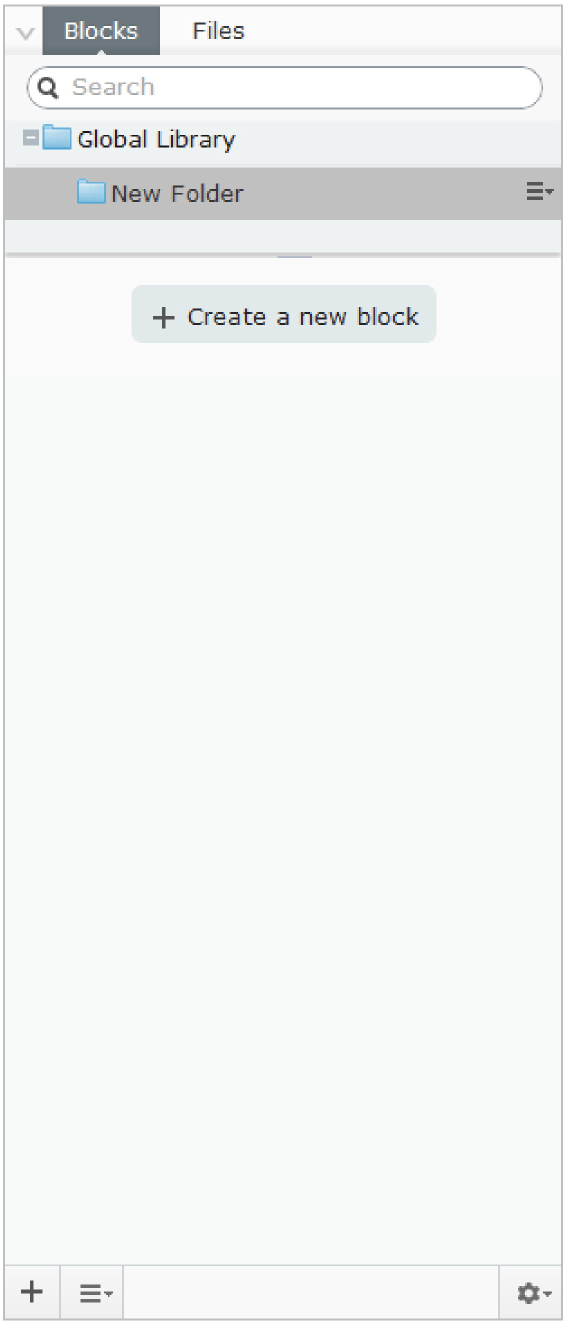
Removing a Page or Block from a Page

Remove a block from a page by selecting **block options** when it appears on mouse-over > **Remove**.

Administering Blocks

You can create shared content as blocks and insert them on the page you are editing. Depending on your access rights you can also manage your blocks and folders through the **Blocks** gadget. To edit the settings for block, see *Editing Content Settings*.

If there are many blocks on your website, you can search for a specific block by typing a keyword in the search box, either the block's name or its content. All blocks that match the keyword will be listed, select the block you are looking for, or click to clear your search and start over.



The gadget provides the following options:

New block. See *Creating a Block*.
On the toolbar you have the combo button with options to create **New Block** or **New Page**. The new page draft will be created beneath the page you have selected. For a new block, you will be prompted to select block library.

Block options and **Folder options**. Here you have options depending on which context you are in, for example, create a folder, create or edit a block.

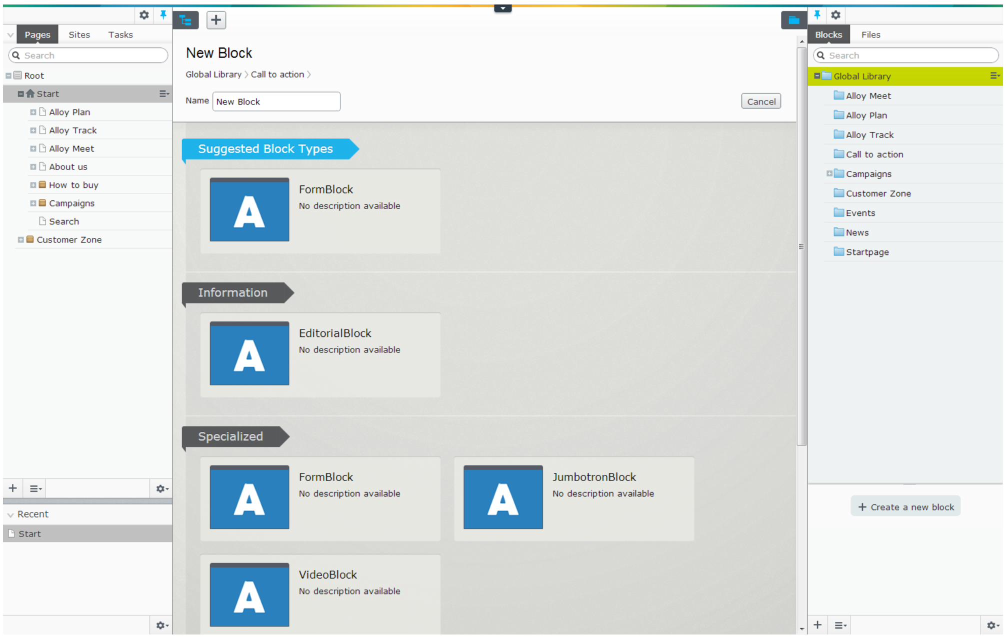
Settings. Here you have options for the gadget, for example, remove gadget.

Content settings. Toggle to access all editing functions on and off for the page or block in a form view as described in *Editing Content Settings*.

See how to add gadgets to the Assets Pane as described in *Customizing Your Gadget Settings*.

For a description of saving and publishing options, as well as options for undo and redo changes, see *Saving and Publishing Content*.

Creating a Block



Create a standard block in as follows:

1. Click **Create a new block**, or the **Add** button ➕ > **New Block**.
2. In **Name**, name the block.
3. Select the **Teaser** block type.
4. Type a header and add the content you want to use in your block. When you create a block, clicking **Back** will take you back to the page you are working on.

5. Publish the block.
6. Drag the block to the page and publish it. A block that has not been published yet appears dimmed on the page as follows:

Note A block that has not been published will not be shown to the visitors. Publish the block as described in *Saving and Publishing Content*.

Tip You can personalize your block content to suit specific visitor groups, see *Personalizing Content*.

Copying a Block

Copy a block as follows:

1. Select the block you want to copy, and **block options** > **Copy**.
2. Select the folder you want to copy the block to.
3. Select **block options** > **Paste**.
4. Edit the block content.

Editing a Block

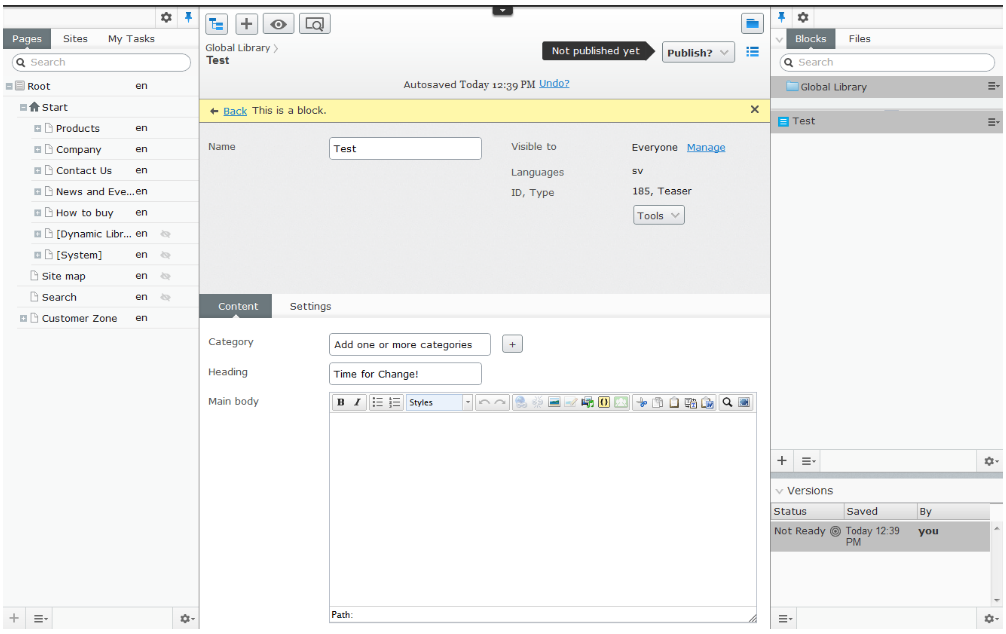
Edit a block as follows:

1. Select the block you want to edit, and **block options** > **Edit**.
2. Make your changes. When you edit a block, clicking **Back** will take you back to the page you are working on.

3. Publish. The changes will be displayed on all pages where the block is used.

Note Change of a block affects all pages on your website where it is used.

Renaming a Block



Rename a block as follows:

1. Select the block you want to rename.
2. Select **Content Settings** and rename the block.
3. Publish. The changes will be displayed on all pages where the block is used.

Moving a Block

Move a block as follows:

1. Select the block you want to move, and **block options** > **Cut**.
2. Select the folder you want to move the block to.
3. Select **block options** > **Paste**.

Removing a Block from the Library

Delete a block as follows:

1. Select the block you want to remove from the library, and **block options** > **Move to Trash**. If the block you are trying to remove is used on one or several pages, you will be requested to remove these links first as described in *Removing a Block from a Page*.

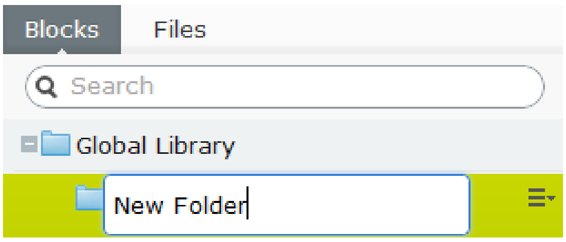
2. Confirm the removal of the block, since this action affects all pages on your website where it is used.

> ***Note*** If you remove a block and trash then is emptied, the block will be deleted permanently. This action cannot be undone.

> ***Tip*** Instead of removing a block from the library, you can stop the block from being published as described in *Saving and Publishing Content*.

Administering Block Folders

You can create shared content as blocks and insert them on the page you are editing. Depending on your access rights you can also manage your blocks and folders through the **Blocks** gadget. To edit the settings for block, see *Editing Content Settings*.



Creating a Folder

Create a block folder as follows:

1. Select the **Shared Block Root** folder or another block folder in the tree where you want to create the folder.
2. Select **folder options** > **New Folder**.
3. Name the folder through *inline editing*.
4. Add blocks to your new folder by creating, moving or copying them.

Copying a Folder

Copy a block folder as follows:

1. Select the folder you want to copy, and **folder options** > **Copy**.
2. Select the folder you want to copy the block to.
3. Select **Folder options** > **Paste**.

Renaming a Folder

Rename a block folder as follows:

1. Select the folder you want to rename, and **folder options** > **Rename**.
2. Rename the folder through *inline editing*.
3. When you are done, click outside the folder you have edited.

Moving a Folder

Move a block folder as follows:

1. Select the folder you want to move, and **folder options** > **Cut**.
2. Select the folder you want to move the folder to.
3. Select **Folder options** > **Paste**.

Deleting a Folder

Delete a block folder as follows:

1. Select the folder you want to delete, and **folder options** > **Move to Trash**.
2. Confirm the deletion.

Adding Dynamic Content to a Page

Dynamic content can be added to a page by retrieving it from different **fields** on a page. For instance the content can come from the “main body” field (the editor area on a page), or from the saved date.

An example of the usage of dynamic content is to display company facts and figures that will be reused on several pages on a website. You may want to show information about your sales revenue over the past three months.

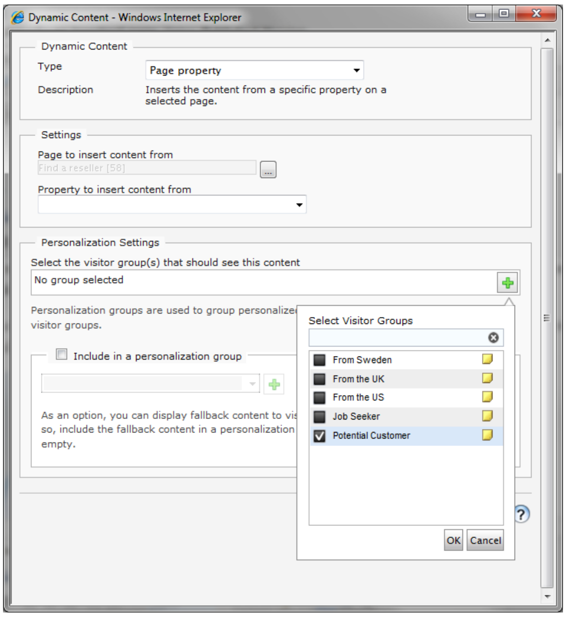
In addition, you can combine dynamic content with a visitor group as described in *Personalizing Content*.

Adding Dynamic Content from a Page Property

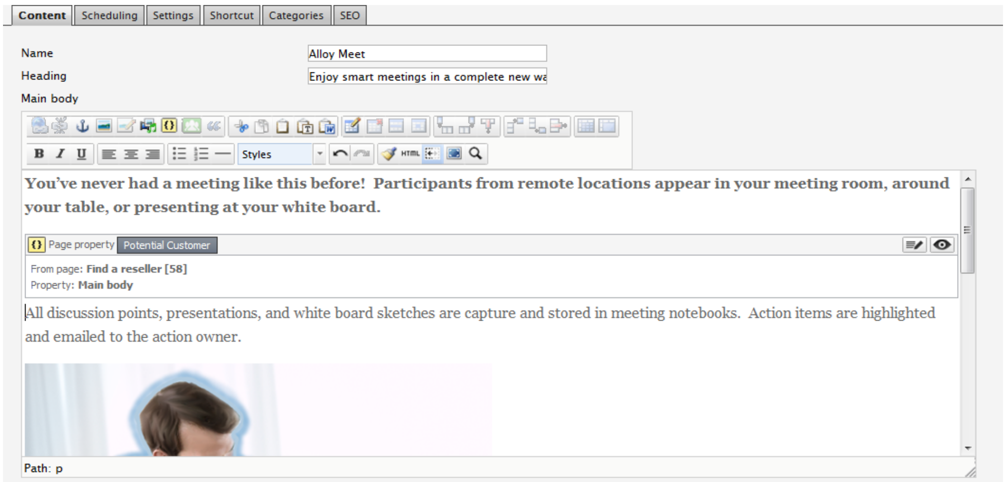
Add dynamic content from a Page Property as follows:

1. Open the page that you want to contain the dynamic content and click the **Dynamic content** button  on the editor toolbar.
2. In the **Dynamic content** window, select the plug-in that you want to use as a base for your dynamic content. The **Page property** plug-in is included in a EPiServer CMSstandard installation and is used in this example.
3. In **Page to insert content from**, select the page in the tree structure from which you want to display the data.

4. In **Property to insert content from**, select the property on the page that you want to display data from. In this example we will fetch data from the **Main body** property of a page.
5. In **Personalization settings**, you can click **+** to select the visitor group you want to have access to the dynamic content. Optional.



6. Click **OK**. The dynamic content is displayed as a box in the editor area. When this property is updated, all dynamic instances of the property in the content will be automatically updated.



7. By clicking the **Preview** button  in the dynamic content box, you can see how the content will look on your page.

Editing Dynamic Content on a Page

When you have opened the page containing the dynamic content box, you can edit it in the following ways:

Through the Dynamic Content Box

1. Click the **Edit dynamic content** button  in the dynamic content box.

2. Make your changes to the dynamic content and click **OK**.
3. Save the page to update the changes.

Through the Insert Dynamic Content Button

You can cut, copy and paste dynamic content boxes in the editor area, just as you can with any other objects.

1. Select the dynamic content box, and click the **Dynamic content** toolbar button {}.
2. Make your changes to the dynamic content and click **OK**.
3. Save the page to update the changes.

> Cut and copy for a dynamic content box in the editor area may work differently depending on the browser you use. You may have to use either the Cut/Copy editor toolbar buttons, or the right-click Cut/Copy of your browser, instead of the keyboard keys (CTRL+X and CTRL+C). If you have trouble placing the cursor immediately before or after a dynamic content box in the editor area, try using the keyboard arrow keys instead of the mouse.

Deleting Dynamic Content from a Page

Select the dynamic content box you want to delete and click **Delete**.

Creating Containers

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

To create a container in the editorial interface, create a new page and select to base it on the container page type. You can then add subpages to be used, for example, in a listing.

The page types to be used for containers are created in the administrative interface.

Structuring the Website

At the top of the structure you will find the root, which is the basis of your website. Under the root you will find typically the node for the start page. You may have more than one start page in the page tree structure if you have a multiple-site enterprise solution.

Under the start page, you create the substructures you want by adding new pages. It may be appropriate to create the page structure before you fill the pages with content.

The structure of the website is made up of pages. The names of the pages automatically form structures and menus. The menus are then dynamically built up of the pages on the website. To make it simple for visitors to find what they are looking for and navigate around your website, it is a good idea to limit the menu structure to a maximum of three levels.

The nodes in the structure has the following symbols:

The root of your website.

The start page on your website.

By moving the mouse pointer over a page in the tree structure, you will see information about that page as a tooltip.

To change the structure of the website by moving, copying and removing pages, see *Structuring the Website*.

You can create shared content as blocks and insert them on the page you are editing. Depending on your access rights you can also manage your blocks and folders through the **Blocks** gadget. To edit the settings for block, see *Editing Content Settings*.

Symbols for Pages in the Tree Structure

A symbol after the pages in the tree structure clarifies the settings for the page. Using the following symbols you can gain a quick overview of the pages:

A page for published content.

A container page used to store and edit data in the tree structure, not visible on the website.

Page contains changes that has not been published.

Page is ready to publish.

A new page that has been scheduled for publishing, not visible on the website yet.

Page has scheduled publishing where the date and time have passed, not visible on the website.

You do not have access rights to change the page.

Page is not shown in menus.

Page is missing for the current language and will be displayed in another language. If the other language has an icon, it will be used as indication (the Swedish flag is used as an example).

Shortcut to page in EPiServer CMS on this website.

Link to external page on another website.

Fetches data from page in EPiServer CMS.

Page is edited by another user in EPiServer CMS.

[Icon] Page is not a local EPiServer CMS page. The page provider uses an icon, if one has been defined.

Moving, Copying and Removing Pages

You have the following options to work with the tree structure in the Navigation Pane:

Page options. Here you have options depending on which context you are in, for example, copy or move a page. These options are also available on mouse-over in the tree structure. Also see *Creating a Page*.

Settings. Here you have the options for **Show All Languages** and View Trash, see Managing Versions and Handling Content in Trash.

Cut

Select the page you want to move and select **Cut**. Select the page to which you want to move your page and select *Paste*.

You can also move a page by using CTRL+X and paste by using CTRL+V on the keyboard to perform this action.

Or, you can move a page by dragging and dropping. Select the page you want to move, and drag the page to where you want it. When the separator line shows, then release the mouse button and drop the page there.

The page will automatically change sort order in the page tree, see *Sorting Page Order in Menus*.

Copy

Select the page you want to copy and select **Copy**. Select the page to which you want to move your page and select *Paste*.

An identical copy of the copied page will now be placed at the chosen location ready for editing. Underlying pages and associated files in the page folder will also be copied, and the links will point to the new copy of the page. Remember that settings, such as authorizations, dynamic properties and *categories*, are also copied to the new page.

You can also copy a page by using CTRL+C and paste by using CTRL+V on the keyboard to perform this action.

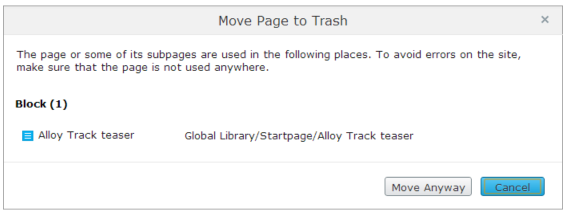
The page will automatically change sort order in the page tree, see *Sorting Page Order in Menus*.

Paste

Select a page to move or copy, then select the page where you want to paste the page and select **Paste**. Confirm that you want to move or copy the page, and the page will be created under the page you have selected.

Move to Trash

Select the page you want to remove from the tree structure and select **Move to Trash**. If other pages link to the page you want to remove, a dialog will show which pages contain these links and request you to remove them.



Clicking each page link will open that particular page so that you can remove the links to the page you want to remove, see *Editing Existing Content*.

When you are done, confirm the removal and the page will be sent to trash.

You can also delete a page by pressing DELETE on the keyboard to perform this action.

To remove pages and send them to trash, you need to have access rights. When you remove a page, remember that all underlying pages will also be removed.

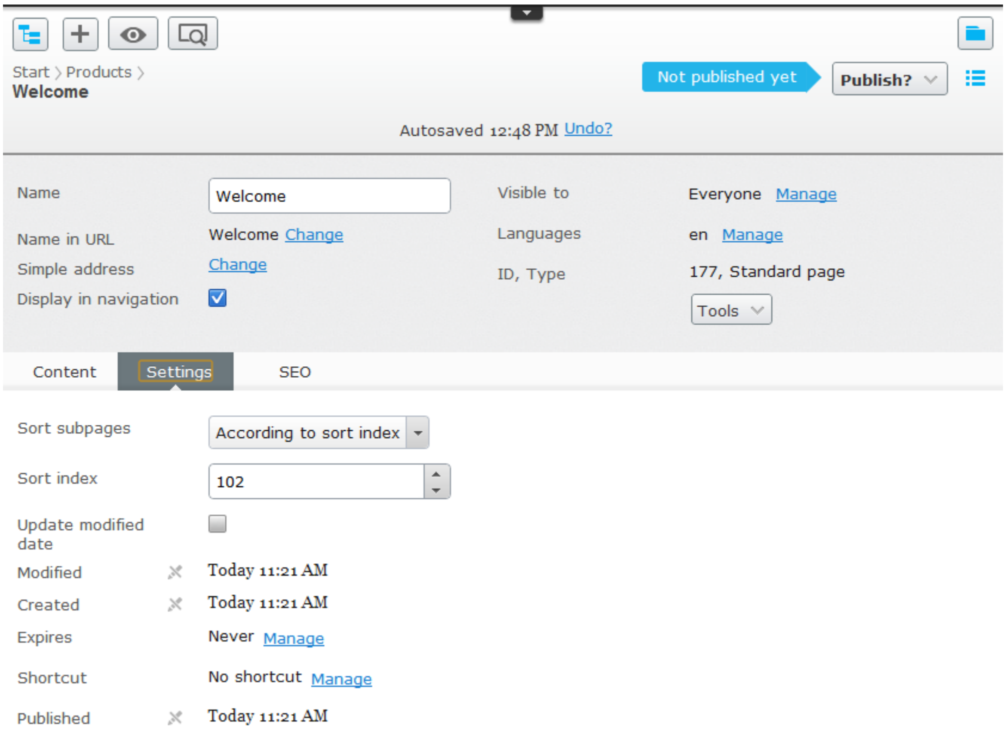
For more information on how to restore a removed page from the tree structure, see *Handling Content in Trash*.

Sorting Page Order in Menus

The pages in are sorted in the tree structure according to a predefined sort order. By default, the page that has been created most recently is placed at the top of the tree structure, for example, in news listings. There are also other options for sorting, such as alphabetically or by sort index. The last option lets you control the sorting through an index defined on each page.

The sort order is set for the main page of the respective branch, and will be inherited to the sub-pages. The main page is called a **parent** page. All pages placed directly under a parent are the page's **children** and they can be sorted relative to one another.

All pages with a plus or minus in front of the name in the structure are parents. If you point to a page, information on the page and its sort index will appear together with additional information about each page.



Set the sort order as follows:

1. Select the parent page of the branch in the structure where you want to set the sorting.
2. Edit the page and select the **Settings** tab.
3. Select sorting criteria under **Sort subpages**. If you choose to sort according to sort index you will also have to set the sort index for each subpage. Or, use drag-and-drop to sort them the way you want as described in *Moving, Copying and Removing Pages*. Confirm that you want the sort order of the page to change automatically.
4. Publish the page.

The pages must be saved and published in order for the selected sorting to take place. For this reason, changes to the sort order cannot be previewed.

Sorting According to Sort Index

If you want to control exactly how the pages in the structure are sorted, select the **According to sort index** option for the parent page. Each child page must then be given a unique sort index number, and they will be sorted in ascending order according to their number, with the lowest number on top.

Change the sort order of pages as follows:

1. Drag the page and drop it where you want it in the page tree. Sorting pages with drag and drop will only be of interest for branches that are sorted with sort index.
    - If you move a page into a branch that is not sorted according to sort index, you will get prompted to move the page and at the same time apply sort index as sort order for that branch. Confirm with **OK**. When you drag a page into a new position in a page tree branch, the sort index will automatically be recalculated to fit the sort order of that branch.
    - If you drop a page under a different parent page (with sort index set as sort order), the page will first be moved or copied, and then sorted. The page will thus remain in the tree in the position where it was first dropped.

The pages that you move will be saved again, meaning that you must have publishing rights to be able to use drag and drop for sorting. You must also have publishing rights for the page branch with sort index to which you move a page.

Sorting According to Sort Index Manually

The setting of sort index can also be done manually for each child page. Open the page for editing, select the **Settings** tab and change the number in the **Sort index** box. The sort index number must be an integer, but there are no other restrictions. The recommendation is to work with whole tens or hundreds, to be able to insert additional pages in between existing ones in the structure. Remember to publish the page to apply all changes to the structure.

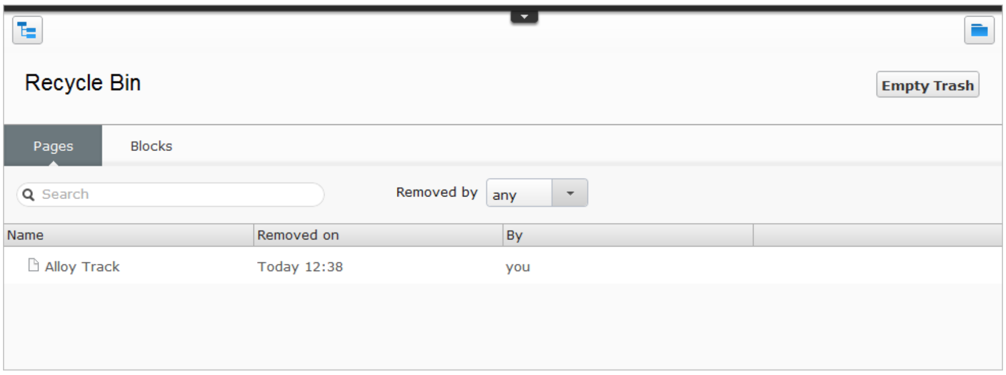
Handling Content in Trash

Trash is a separate node in tree structure. When you remove a page from the tree structure, the page and all underlying pages are sent to trash and are automatically unpublished from the website.

Access trash as follows:

Settings. Select **View Trash** to view the removed content.

The trash view consists of the **Pages** and **Blocks** tabs. You can search for content by keyword or user. Depending on your access rights, you can delete all content permanently.



When you view the page from trash, the following functions will be disabled:

- You cannot move or copy pages inside trash.
- You cannot access the editing functions. To be able to edit the page, restore it as described below.

You have the following options to change the contents inside trash:

Restoring a Page from Trash

To restore a page, select the page in trash and click **Restore** (it also appears on mouse-over). Confirm the restore, and the page will then be republished.

Emptying Trash Manually

Many organizations empty trash as a scheduled job. The time the pages remain in trash is controlled by a system setting done by your system administrator.

Depending on your access rights you can delete the entire content of trash. Select **Empty Trash** to empty its entire content. Confirm the deletion.

Note This action will delete ***all content*** permanently, and cannot be undone.

Managing Versions

EPiServer CMS allows you to work with version management.

A page or a block that has previously been published and then changed, will be saved as a new version. When you are working on a page or a block, you might want to see its version status. Managing versions give you the opportunity to access and republish older versions and more.

If you are several editors working on the same content you will work with a shared draft by default, meaning that your changes are saved in the same version, see *Editing a Shared Draft Version*. You can also create a new version.

Tools for Managing Page Versions

You can see and manage page versions in the following ways:

Content Status on the Toolbar

The toolbar gives you the following status information of the content:

A page or a block that has been published will be in **Published Version** status.

A page or a block that has been set to **Ready to Publish** will be in **Ready to Publish** status.

A new page or a block that has not yet been published or set to ready to publish, will be in **Not Ready** status.

A published page or a block that has been changed but not yet published, will be in **Not Ready** status. It could also has been set to **Ready to Publish**, if it was not approved it will be in **Rejected** status.

A page or a block that has been scheduled for publishing:

- New will be in **Published** status
- Changed will be in **Delayed Publish** status

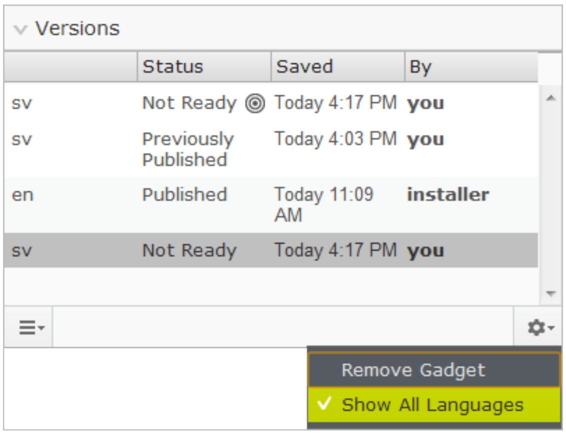
Versions Gadget

You can see a list of page and block versions and you can manage them from the **Versions** gadget, where you also can manage language versions. See how to add gadgets to the Assets Pane as described in *Customizing Your Gadget Settings*.

The gadget provides the following options:

Version options. Here you have options depending on which context you are in, for example, delete a page or block version.

Settings. Here you have options for the gadget, for example, remove gadget.



A page can have the following status in the version list:

- **Published Version** is the most recently published page version and displayed to the visitors
- **Previously Published** is a page version that was published before the latest published page
- **Not Ready** is a saved page draft but not yet published
- **Ready to Publish** is a page waiting to be published by anyone with access rights
- **Rejected** is a rejected page draft that has been replaced by the **Published Version**
- **Delayed publish** is a page that is set to be published at a certain time

Published version is the page version that will be displayed when the page is selected in the tree structure.

The number of versions stored for a page is controlled by a systems setting done by the system administrator.

Editing a Shared Draft Version

If you are several editors working with a page, you will automatically work on a shared draft by default. You can create new page versions, and you can choose one of these page versions for all to continue working with by selecting **Set as Primary Draft**.

The shared draft has the symbol ◎.

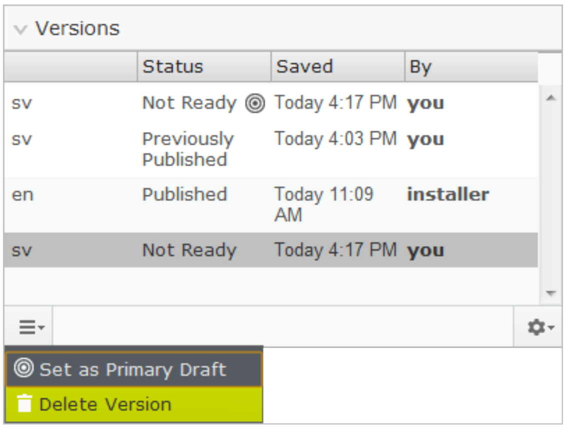
When you schedule publishing for pages and blocks, you have an option to create a new draft version. Select **Options** > **New Draft from Here**, and the new draft version opens for editing.

Editing a Version

Select the page version you want to edit from the version list, and make your changes as described in *Editing Existing Content*.

Deleting a Version

You can delete a version for content you do not want to keep by selecting **Delete Version** in the version options for that version. Confirm the deletion.



Note You cannot delete a published page version, as well as you cannot delete a recently created page (only in unpublished version).

Tip If you do not want it to be possible to delete older page versions in the version list, the delete function can be disabled from the administrative interface.

Republishing Content

When you republish a page that has been published before, for traceability reasons a new version of that page will be created even if no actual changes has been made to the page.

The republished page will get a new timestamp under **Saved** in the version list.

Managing Languages Versions

You can see a list of page and block versions and you can manage them from the **Versions** gadget, where you also can manage language versions.

Only the current language is shown by default in the version list, which has been selected under the **Sites** tab on the Navigation Pane. Also a language code is displayed.

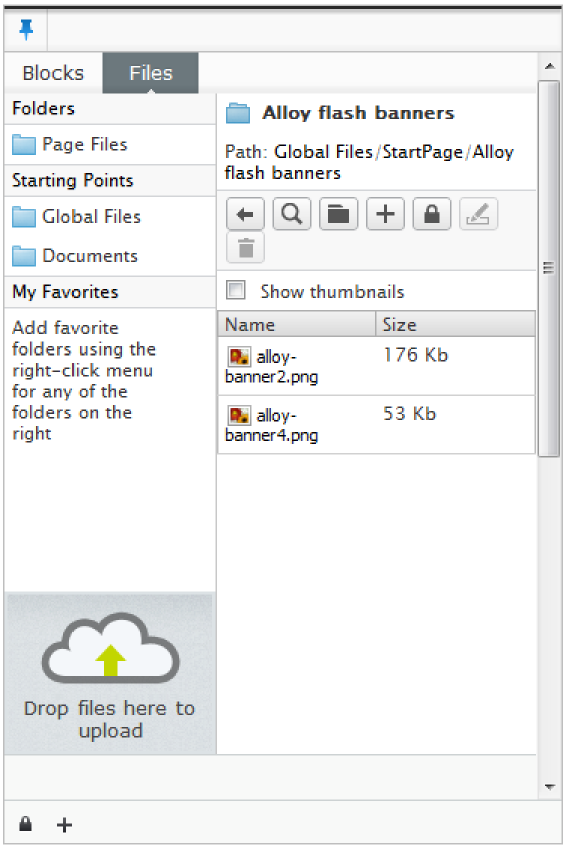
Tip Clicking any of the header columns in the **Versions** view make it possible for you to sort versions in ascending or descending order, by status, language and more.

To create links to content so that the visitor is directed to the language version you have decided, see *Linking to Content*. Also refer to *Globalizing Content*.

Managing Files

EPiServer CMS has its own file manager where you can create folders, copy, move and rename both folders and files. You can upload files and set search criteria for the files. Use the built-in search function to search for files. Depending on your access rights you can set access rights for different folders, which means that users only can see the folders they are authorized to.

You can access the File Manager through the **File Management** gadget in the Assets Pane.



File Manager contains the following:

- The name of the selected folder is displayed, as well as the path for the folder.
- Selecting **Show thumbnails** will display thumbnails for images in a folder. Files are displayed with their name and size. You can also see when a file was modified, and the checkout status for a file.
- With the File Manager toolbar buttons, you can navigate the folder structure, search and create folders, add files to a folder, and rename and delete files and folders. You can also set access rights for folders.
- **Starting Points** are data sources that are linked to your websites. **Global Files** and **Documents** are default starting points, these can be configured and your installation may have additional starting points.
- **Page Files** is a folder that is connected to the selected page. Files that are stored in the Page Files folder are only accessible from this specific page.
- **My Favorites** are shortcut to favorite folders of your choice.

Right Mouse Button in the File Manager

The menu that opens when you right-click in the File Manager is central to executing different operations in the File Manager. Some of the functions are also accessible from the File Manager toolbar. Active functions are shown with bright colors in the right-click menu. Depending on what you are doing in the File Manager, different functions are activated. The options **Delete, Cut, Copy** and **Paste** can be used on both folders and files.

Adding Content on a Page through Drag and Drop

Pages have different content areas depending on which properties that has been set up for each page type respectively. You can drag and drop different items to these content areas, for example, drag an image and drop it to an area that supports image properties, or a block to areas that supports that kind of content.

You can use drag-and-drop operations to create the following content on a page:

- *Inserting an image*
- *Creating links by dragging a page in the tree structure into a page in the Rich-Text Editor*
- *Adding content from pages and blocks*

To upload, copy, move and delete files, see *Managing Files*.

Folders

You can group the files in File Manager into folders as follows:

Creating Folder

Create a folder by selecting **Create a new folder** on the toolbar or the right-click menu. Enter the name of the folder and select **Save**.

Opening Folder

Open a folder by double-clicking the folder’s name.

Deleting Folder

Delete a folder by right-clicking the folder’s name and selecting **Delete**. Confirm the deletion by clicking **Delete**. If the folder contains files you will receive a warning message. Click **Delete** if you want to delete the folder anyway.

Renaming Folder

Rename a folder by right-clicking the folder’s name and selecting **Rename**. Type in the new name and select **Save**. Links to the files in the folder will not be affected by the renaming, since links are saved with a unique identity that is not connected to the search path or the file name.

Adding Folder to My Favorites

Add a folder to My Favorites by right-clicking the folder’s name and selecting **Add Favorite**. The folder is added to the **My Favorites** section in the left part of the File Manager. Click **My Favorites** to expand the section and display favorites.

Removing Folder from My Favorites

Remove a folder from My Favorites by right-clicking the folder’s name to the left in the directory structure and selecting **Remove Favorite**. This removes the folder from the **My Favorites** section.

Changing Access Rights to Folder

Change the access right to a folder by right-clicking the folder’s name and selecting **Change access rights**. In the window are the groups/users who have access rights to the folder. Change by clicking **Add Users/Groups** and selecting the access rights that the user or group should have. Finish by clicking **Save** . If a page has specific access rights set, the **Page Files** folder for that page will also have the same rights.

Move Folder

Move a folder by right-clicking the folder name and selecting **Cut**. Open the folder to which you want to move the folder, right-click and select **Paste**. Links to the files in the folder will not be affected, since links are saved with a unique identity that is not connected to the search path or the file name.

Note You cannot use drag and drop to move folders and files inside the File Manager.

Copy Folder

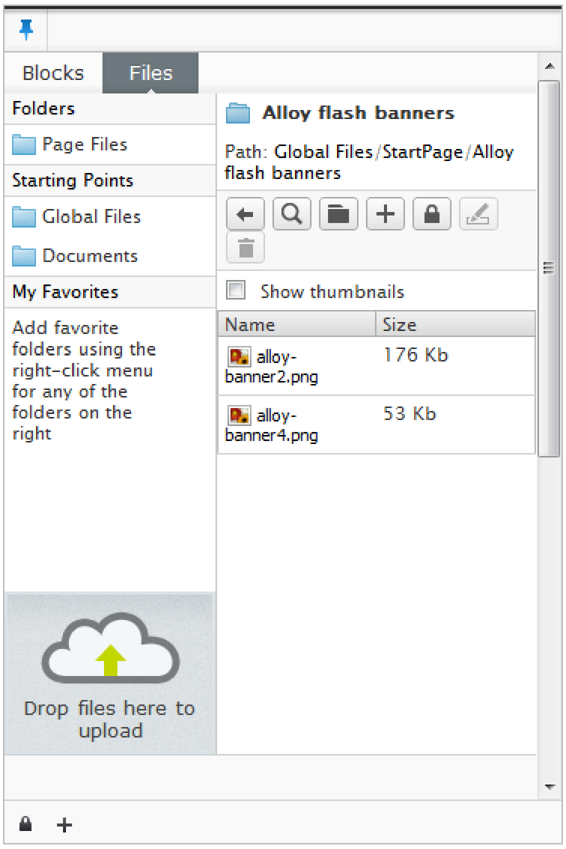
Copy a folder by right-clicking the folder name and selecting **Copy**. Open the folder to which you want to copy the folder, right-click and select **Paste**.

Files

All the information that you want to show on your website must be saved on the web server or an external data source to which visitors have access rights. You need to upload the images and documents to the File Manager to be displayed on the website. External data sources can be integrated with File Manager.

Uploading Multiple Files

Before you upload files you can create a new folder, or use the **Page Files** folder.



Note To upload files to the current folder in File Manager, you need to have access rights for this operation.

When you insert an image, it is important that the folder where you want the image to be stored is selected. You can also upload images from inside the EPiServer CMS File Manager.

You can upload multiple files simultaneously in File Manager in any of the following ways:

Uploading through Drag and Drop

Drag and drop the files for upload as follows:

1. Select the folder you want to upload the files to.
2. Open the Explorer in Windows and select one or several files you want to upload. Hold down the SHIFT or CTRL keys to select multiple files.
3. Drag the files and drop them when the **Drop files here to upload** area is highlighted.

Selecting Files from File Manager Toolbar

Browse the files for upload from the toolbar in File Manager as follows:

1. Select the folder you want to upload the files to.
2. In the File Manager toolbar, click **Add new file** button to open the **Add Files** dialog window. Or, if it is a single file to upload, right-click and select **Add file**.
3. Click **Add new file** button again. Browse to select one or several files you want upload. Hold down the SHIFT or CTRL keys to select multiple files.
4. Click **Open**. The uploaded files appears in the dialog window. You can add more files if you want.
5. When you are done, click **Close**.

Menu Options

Showing File Summary

You can display file information by right-clicking on the file name and selecting **Show File Summary**. File information together with metadata that has been entered for the file will be displayed, you will also find references to pages to which the file is linked.

Editing File Summary

Edit file information by right-clicking on the file name and selecting **Edit File Summary**. Enter information in the meta data fields. Select **Save** when you have changed/added the information.

Opening a File

Open a file by double-clicking the file name or by right-clicking on the file name and selecting **Open File**. How the file opens, depends on the settings on your computer. Normally the file opens in the program in which it was created, meaning that this program must be installed on your computer. If the program is unavailable, you may be prompted to save the file instead.

Renaming a File

Rename a file by selecting **Rename selected file or folder** in the toolbar or by right-clicking on the file name and selecting **Rename**. Type in the new name and select **Save**. Renaming a file will not cause any links to be broken.

Replacing a File

Replace one file with another by uploading a new file with the same name as the file you want to replace, to the File Manager.

Deleting File

Delete a file by selecting **Delete selected file or folder** in the toolbar or by right-clicking on the file name and selecting **Delete**. Confirm that you actually want to delete the file by answering **Yes** to the question that follows. A message appears warning that any links to the file might be broken. Information about which links this applies to is also shown, so that you can update them when you rename the file.

Moving a File

Move a file by right-clicking on the file name and selecting **Cut**. Open the folder to which you want to move the file, right-click and select **Paste**. Moving a file will not cause any links to be broken.

> You cannot use drag-and-drop operations to move folders and files inside the File Manager.

Copying File

Copy a file by right-clicking on the file name and selecting **Copy**. Open the folder to which you want to copy the file, right-click and select **Paste**.

File Version Management

In the File Manager you can track different versions of the file using the version manager. You can see the history of the file, when it was created, by whom and any comments. As editor you can check out documents that you are working with so that no on else can modify the file at the same time. You can access the version management in the File Manager when you right-click on a file.

> If you cannot see the version management functions in the File Manager, it might be that these functions have not been activated in parts of or the entire File Manager. This can be configured, check with your system administrator to find out what applies on your website.

Checking Files In and Out

When you check out a file it is locked so that nobody can modify it at the same time as you. However, despite it being locked, other editors or visitors to your website can see the content.

When you have made your changes and want to make the file accessible to others, check it back into the File Manager. You can also add a comment in which you briefly describe the changes that you have made. Comments make it easier for other editors to understand the content of the latest version and the changes that have been made.

Canceling Check Out

If you do not make any changes to the document that you have checked out, restore it by right-clicking on the file you checked out and select **Cancel Checkout**.

Working with Version Management of Other Files

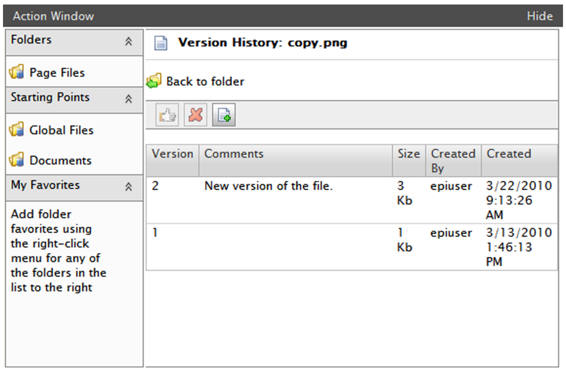
You can also manage versions of files that are created in other programs than Microsoft Office.

1. Open the file by double-clicking it. The relevant program is opened and you can make changes to the file. Save the file locally on your computer by selecting **Save As...**
2. Right-click the selected file and select **Create New Version**.

3. Select a new version by selecting **Browse**. Select the file you have edited and saved on your computer. Select **Open**.
4. Enter your comment and select **OK**. A new version of the file has been created and is available for editors and visitors to the website.

Version History

Information about all updated versions of a checked in file are available in the version history. You can see who has made the changes, when they were made and also any comments about the changes. Right-click the file you want to see the history of. Select **Version History**.



Downloading an Earlier Version

All versions of the file are stored and accessible. This means that you can download and work with earlier versions.

1. Right-click the file you want to see an earlier version of. Select **Version History**.
2. Right-click the version you want to look at. Select **Download** and the file is opened in the relevant program.

Republishing an Earlier Version

As all earlier versions of the file are stored and accessible, they can be republished.

1. Right-click the file you want to see an earlier version of. Select **Version History**.
2. Right-click the version you want to republish. Select **Restore Version**, or select **Restore to this version** in the toolbar. The restored version will be republished and made available to editors and visitors to the website.

When restoring a previously published version of a file, the restored version will get a new version number.

Deleting Versions

1. Right-click the file you want to see an earlier version of. Select **Version History**.
2. Right-click the version you want to delete. Select **Delete**, and the version is immediately deleted.

You cannot delete the file version that is currently published. To be able to delete it, you must first replace it by another version, and then delete it from the version list.

Globalizing Content

EPiServer CMS supports multiple language versions of website content. You can have the entire website content translated into several languages or only parts of it. For content that is not translated you can set a *fallback* or *replacement* language on all content or an individual page.

Every website has a so-called **default language** set up in the administrative interface. The default language is the language that is shown primarily to website editors and visitors, but it is also possible to view a language other than the default language.

> You will only be able to create and edit pages in a languages for which you have the correct access level. Contact your systems administrator if you do not have access to pages in a certain language.

Creating Globalized Content Work Procedure

Create globalized content in the following steps:

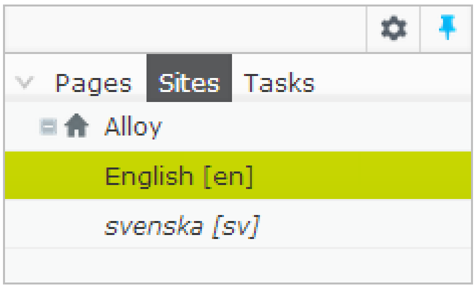
1. The administrator adds a new language to the website. The administrator can also set up access levels for each language.
2. The administrator enables the language to be active in the editorial interface under **Language Settings**.
3. The editor selects the new language under the **Sites** tab.
4.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

Step 1: Selecting Language

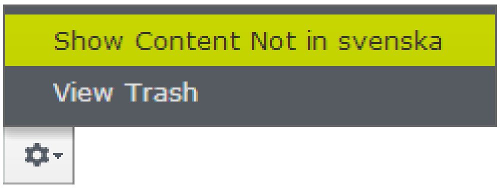
Pages

When you are editing a page, the tree structure is shown to the left.

The **Sites** tab on the Navigation Pane displays the languages that you have access to create and edit pages in. The chosen default language for the website is shown at the top of the language tree structure.



Selecting “Svenska” (Swedish) will reload the tree structure. Not translated pages have a language code representing the fallback language, when this is turned off only pages that are available for the current language will be shown. Select **Show Content Not in [Language]** to show all pages on the site. Pages shown in italics with language code has not yet been translated.



Blocks

Translation of blocks works in a similar way as for pages. Select the language you want to translate to on the **Sites** tab. Select **Show Content Not in [Language]** in the block library. Select the folder where you want to create translated content, and you can also rename the folder if you want. Blocks shown in italics with language code has not yet been translated.

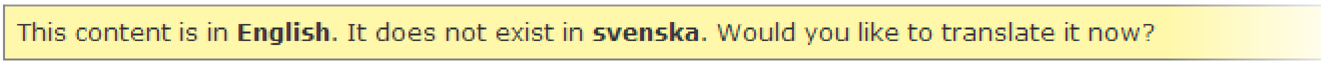
Then select any of the blocks where you want to translate the content > **Translate**. Toggle *Content Settings* and rename the block and its content.

Note Some blocks have properties with the symbol . These are shared by all languages, and cannot be edited or translated.

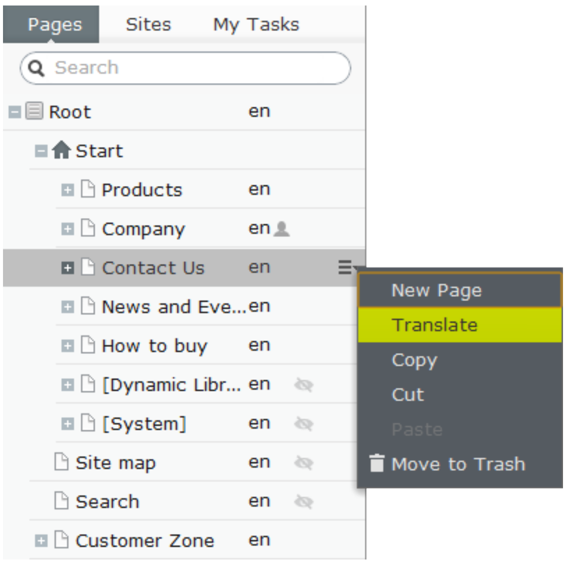
Step 2: Creating Content in Another Language

If the content has not yet been created in another language version, a language code and a notification will be displayed to the editor that the language is missing and the content is shown to the website visitors in the selected **fallback language**, see *Defining Language Settings*.

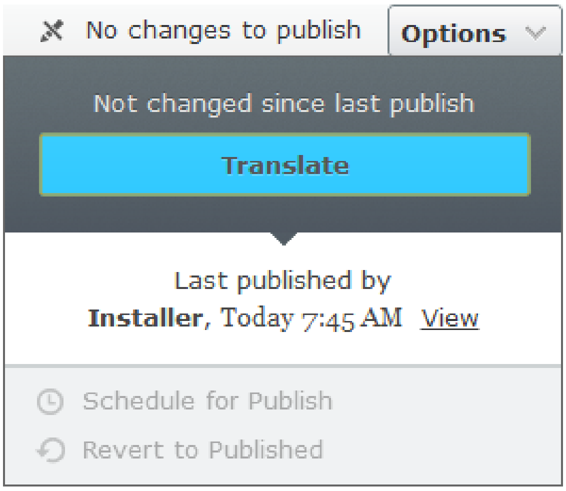
The new language version of the page you have selected is in read-only state, and the following notification is shown on the toolbar:



1. Create content in another language in any of the following ways:
   - Click **page options** for the page you have selected in the tree structure > Select **Translate**.

   - Click the **Translate** button on the notification bar, or the **Options** combo button on the toolbar.



2. Edit the page and drag shared content to it as described in *Using Shared Content on a Page*.
3. Clicking the combo button expands a drop-down menu containing several options. These options transform according to your access rights and the content version status as described in as described in *Saving and Publishing Content* and *Managing Versions*. Depending of version status, the following options are available:
   - Publish
   - Schedule for Publish
   - Remove Scheduling and Edit
   - Ready to Publish
   - Revert to Published
   - New Draft from Here

Handling Language Versions

You can see a list of page and block versions and you can manage them from the **Versions** gadget, where you also can manage language versions.

To create links to content so that the visitor is directed to the language version you have decided, see *Linking to Content*.

For version management of blocks and pages, see *Managing Versions*.

See how to add gadgets to the Assets Pane as described in *Customizing Your Gadget Settings*.

Deleting Language Versions

It can sometimes be necessary to delete a language version without deleting the entire page and the other languages.

You can delete language versions from the **Versions** gadget. For version management of blocks and pages, see *Managing Versions*.

Defining Language Settings

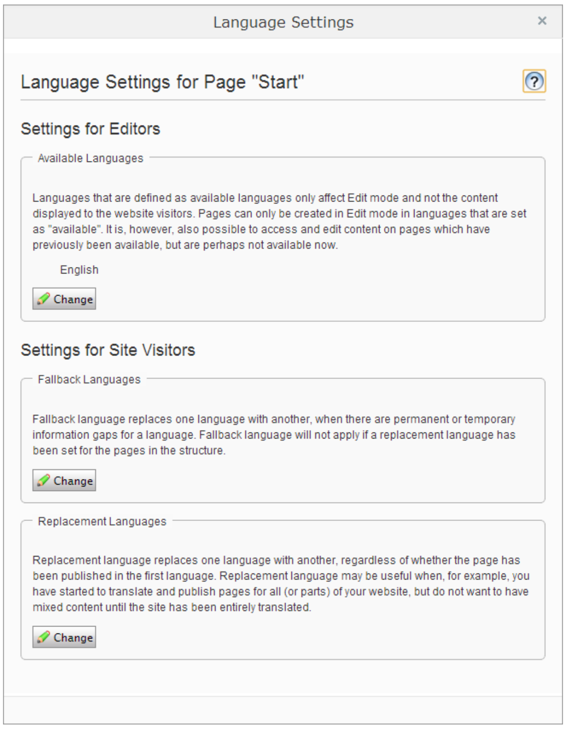
The languages available on the website can vary in different places in the tree structure. It is possible to make only a small part of the website available in several languages. It is also possible to have replacement and fallback languages, so that you can define what happens if a page is not available in the language that the website visitor is currently visiting.

Certain fields in each page type will be the same for all languages and the value of these fields must be changed in the website's default language. You can also change the language settings for an individual page to not use the inherited language settings from the parent page.

With the **Language Settings** option in the toolbar you can select how the website displays a certain language.

Language settings are divided into two groups:

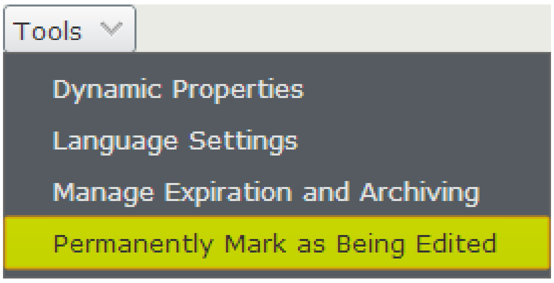
- **Available languages** are settings that affect languages available for editors.
- **Replacement language** and **Fallback language** are settings that affect the language for content that is presented to the website visitors.



Creating Content in Available Languages

Pages can only be created in languages that are set as "available". It is also possible to access and edit content which have previously been available, but are perhaps not available now.

> You will only be able to create and edit pages in a languages for which you have the correct access level. Contact your systems administrator if you do not have access to pages in a certain language.



1. Select the page in the structure from where you want make one or more languages available in the editorial interface. For example, if you want the entire website to be available, select the start page.
2. Toggle *Content Settings* and select **Tools** > **Language Settings**.
3. Clear the **Inherit settings from the parent page "xxxxxx"** if you want to create special settings for this part of the site.
4. Select **Change** under **Available languages**.
5. Select the languages that you want to be available.
6. Click **Save**.

> Languages can only be made available after they have been enabled in the administrative interface. Contact your systems administrator if the language you want to be available is not in the list of available languages.

Setting a Replacement Language

Replacement language replaces one language with another, regardless of whether the page exists in the first language. This can be useful when you want to show content from the second language rather than that from the first language.

Replacement language can be useful in the following scenarios:

- Pages exist in the first language, but you want visitors to view the content in another language, for example if old content still exists.
- You have started to translate all pages (or parts) of your website, but do not want to have mixed content until the site has been entirely translated. In this case you use replacement language until you have translated all the pages.
- If a subtree does not exist in the first language, you can set the second language as the replacement language to show content from that language instead.

> Replacement languages can cause that mixed languages are shown to the visitors on the website.

1. Select the main page in the structure for which you want to set the replacement language.
2. Toggle *Content Settings* and select **Tools** > **Language Settings**.
3. Clear the **Inherit settings from the parent page "xxxxxx"** if you want to create special settings for this part of the site.
4. Select **Change** under **Replacement languages**.
5. Select the replacement languages for the various languages.
6. Click **Save**.

Setting a Fallback Language

Fallback language replaces one language with another, when there are permanent or temporary information gaps for a language. This can be useful when you want to show content from the second language rather than that from the first language. Fallback language will not apply if a replacement language has been set for the pages in the structure.

Fallback language can be useful in the following scenarios:

- Pages are not available in the first language, but you want visitors to view the content in another language instead.
- You want to start translation of your website and want all pages to be available in the final language when they are published, but until then the page should be shown in another language.
- If a subtree does not exist in the first language, you can set the second language as the fallback language to show content from that language instead.

> Fallback languages can cause that mixed languages are shown to the visitors on the website.

1. Select the main page in the structure for which you want to set the fallback language.
2. Toggle *Content Settings* and select **Tools** > **Language Settings**.
3. Clear the **Inherit settings from the parent page “xxxxxx”** if you want to create special settings for this part of the site.
4. Select **Change** under **Fallback languages**.
5. Select the language to use as the fallback for the language the visitor chose. Select a second language to show if the content is not available in the first language.
6. Click **Save**.

Personalizing Content

EPiServer CMS has a feature called **Personalization**, which is a way to adapt the content on your website to particular groups of your audience. As an editor you can design information on your website to suit a specific visitor group.

To target your content you simply select any content on a page – an image, a text, a shared block or piece of dynamic content – and select which groups that are to be allowed to see it. Note that visitor groups will only have read access.

You can show different content on the front page to returning versus new visitors. Target easy links to your products for potential customers, or, present the address of the sales office closest to the visitors from one country. See *Creating Personalized Content*.

You can cut, copy and paste personalized content boxes in the editor area, just as you can do with any other objects.

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.

Creating Personalized Content

When you add personalized content, you have the following options:

- **Personalize content on an entire page**. Select the content on the entire page for one or several visitor groups. Or, the administrator can apply access rights on the page for the visitor groups.
- **Personalize content on parts of a page or shared block**. Select the content for one or several visitor groups, but also the content to be displayed for all other visitors who do not match a visitor group. To create content to be shown only once, you can group several visitor groups to be treated as one as described in *Adding Personalization Groups*.

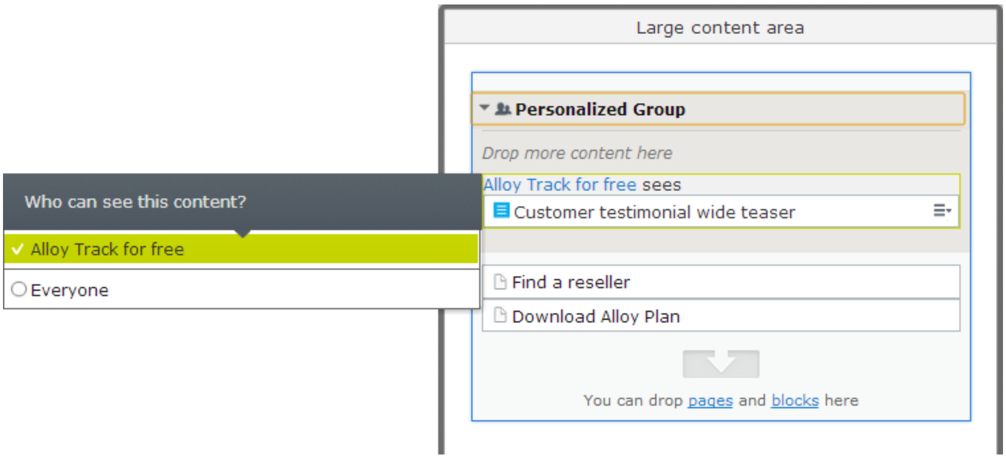
Adding Personalized Content

Personalizing a Block

Personalize a block as follows:

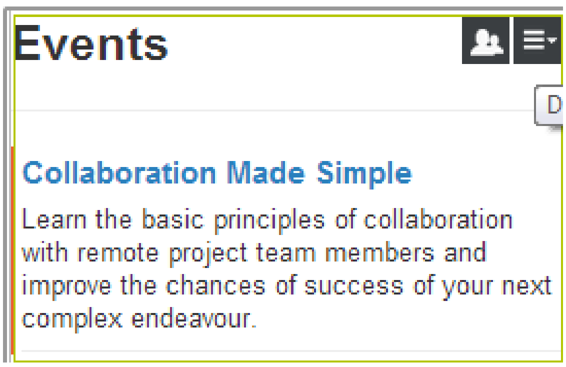
1. Create and drag the block to a page as described in *Using Shared Content on a Page*.

2. Select the block you want to personalize, and select the block options menu and **Personalize**.



3. Select one or several visitor groups. You have the following options:
   - **[Visitor group name]** means that the content will only be shown for these visitor groups you have selected. It means that the content will be hidden from all other visitors who do not match the criteria. If you have several blocks that match a visitor group, only the first matching block will be shown.
   - **Everyone** means that the content will be shown to all visitors (and all visitor groups). Place this block last in the list of personalized content as fallback content for the visitors who do not match any of the criteria.
4. You can group blocks to be seen by a specific visitor group by dragging and dropping them into that area. It is important to place the blocks in the list of personalized content in a suitable order to achieve desired results. Example:
   Place the block for **Visitors from Sweden** as first, **Visitors from Europe** as second, and **Everyone** as the last.
5. Preview the content as a visitor group as described in *Previewing a Page*.
6. Publish the block.

All blocks with personalized content has the following icon next to the block options:



Note Personalization of a block only affects it on that particular page where it is used.

Changing Personalized Content

Changing personalized content means that you can add or remove visitor groups and content groups. When you have opened the page containing the personalized content box, you can change it in the following ways:

Deleting Personalized Content

When you have opened the page containing the personalized content box, you can delete it in the following ways:

Removing Personalization from a Block

Remove personalization from a block as follows:

1. Select the block you want to remove personalization from, and select the block options menu and **Personalize**.
2. Change to **Everyone**. Clear the check mark from one or several visitor groups?

Note This action affects only the block on that particular page where it is used.

Deleting Only the Personalization Markup on a Page

Deleting personalized markup means that you remove the personalized content box from a page, but keep the text or image content itself on the page.

1. Click the **Edit personalized content** button in the personalized content box you want to delete.
2. Click the **Remove Personalization** button.
3. Publish.

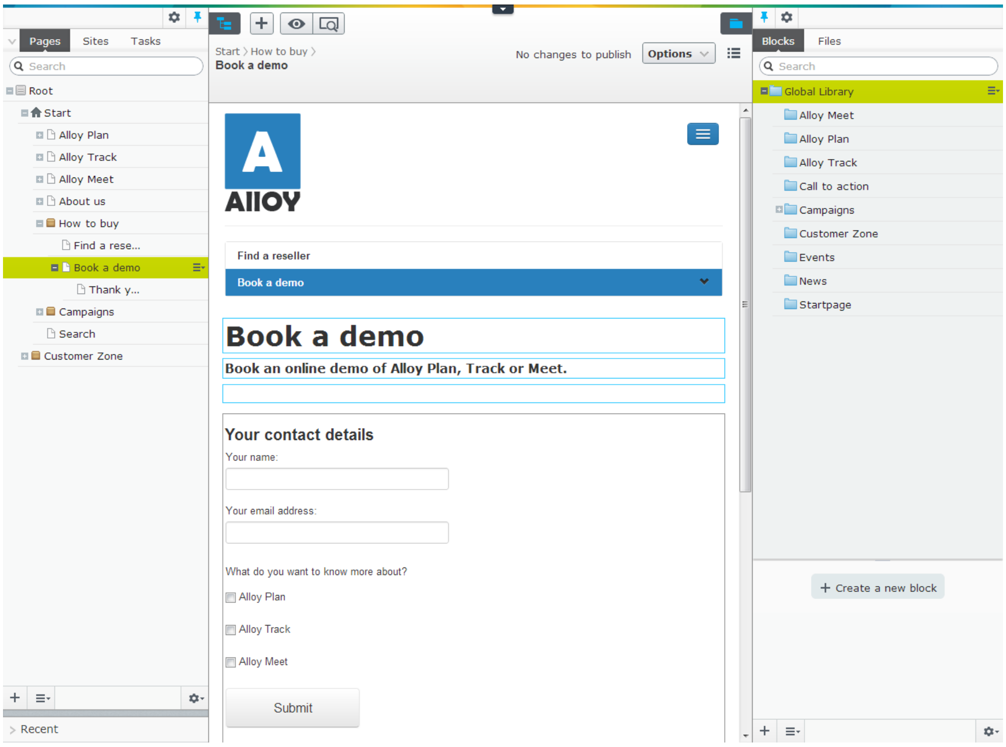
Deleting Both Personalization Markup and Content on a Page

Deleting personalized markup and content means that you remove both the personalized content box and its content from a page.

1. Select the personalized content box, and press **Delete** on your keyboard.
2. Publish.

Using Forms

The **Form page** page type is used for creating different types of forms, for example a simple web poll, registration for an event or a questionnaire. You create forms according to your own preferences, and then receive the information by e-mail and/or save it in a database. You decide the design of the form and the information that you want to receive.



Forms created on the website can be used on many different pages. You can choose whether you want to retrieve common data from one form used by many pages, or whether you want data from each individual page. All forms on a website are collated in a structure in the **Select Form** dialog, which is reached when you insert a form in the form page type.

Administering Forms

Forms are administered in the **Select Form** dialog, which is where it is possible to build a folder structure to more easily structure all forms on the website. The **Select Form** dialog is reached by clicking the **Browse** button in the **Form** field in the **Form** page template.

Select which form folders to view by selecting the appropriate folder or **All forms** in the **Folder** drop-down list. In this dialog you can see on which pages the forms are used, who created and last changed the form and when. Select **List my forms** to only display the forms that you have created or last changed.

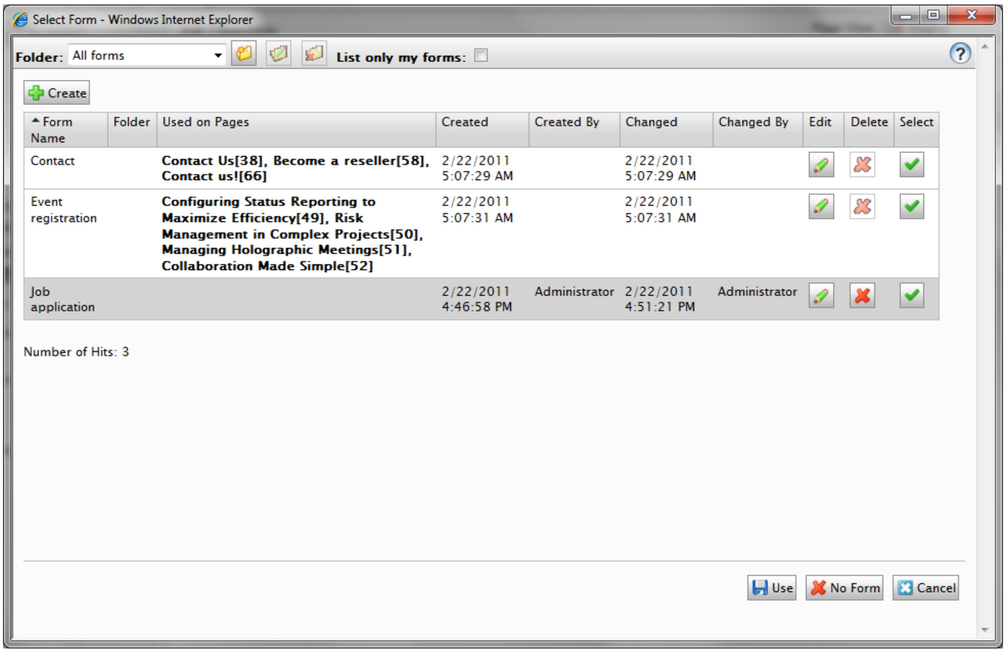
You can manage the folder structure for forms in the following ways:.

 Click **Create new form folder** to create new folders.

 Click **Rename selected form folder** to change the name of the selected folder.

 Click **Delete selected form folder** to delete the selected folder. You can only delete folders that do not contain any forms.

The forms can be placed in the different folders when you edit or create them.



- Click the **Edit** button to edit a form. When you have chosen to edit a form, you can choose to save it with a new name or replace the existing form.
- Click the **Delete** button to delete a form. Forms can also be deleted from within the **Edit Form** dialog.
- Click **Select** to select a row (form). Click **Use** to use the selected form on a page.
- Click **Create** to create a new form.
- Click **No Form** if you do not want the page you are editing to have a form. This will remove the connection to the form that is currently being used.

Building Up a Form

The **Edit Form** dialog is used for creating and editing forms. Here, you can build up a table and add the different form fields as you want. You can also select the properties for each field.

The following tabs are used to create your form:

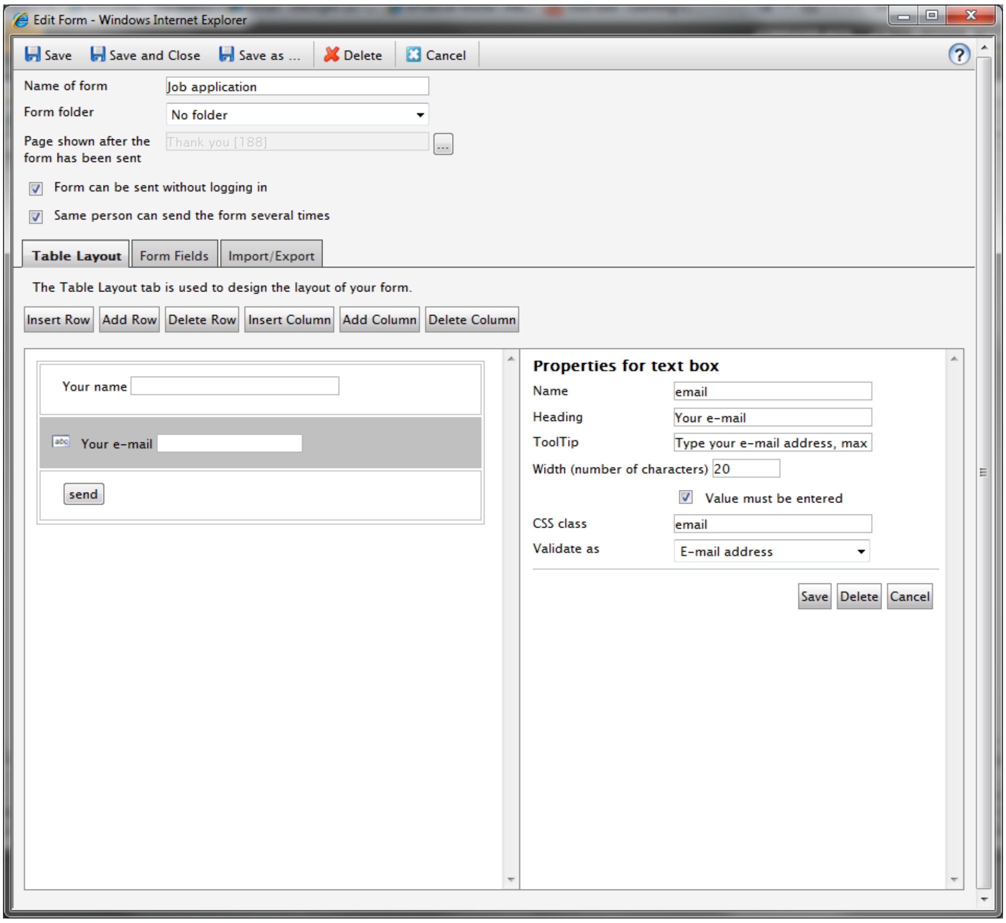
- **Table Layout** tab is used to design the layout of your form. The table in this tab must contain at least one cell (row or column) before you can add fields in the **Form Fields** tab. Rows and columns can only be inserted into the table in this tab, although the settings for the form fields can also be updated here. The form fields can be moved around within the table to an empty cell by first clicking the form field to be moved. Place the cursor over the icon to the left of the cell representing the type of form field and drag the field to an empty cell. This can be done from all of the tabs in the **Edit Form** dialog.
  - Click **Insert Row** to insert a row above the row that is currently selected.
  - Click **Add Row** to add a row at the bottom of the table.
  - Click **Delete Row** to delete the selected row.
  - Click **Insert Column** to insert a column to the left of the selected column.
  - Click **Add Column** to add a column to the far right of the table.
  - Click **Delete Column** to delete the selected column.

- **Form Fields** tab is used to add form fields to a form . Add a form field to a table by dragging the field in question to an empty cell in the table. Each cell in the table can only contain one form field.
- **Import/Export** tab is used to export and import forms from and into a page in EPiServer CMS. Forms can be exported, for example, if you want to display them on another EPiServer CMS website, or within another application. Forms are exported in XML format. To export a form, click **Export** and select whether you want to open the form or save it to your computer. Import a form by first browsing to the form in question and then click **Import**. Note that import will overwrite any unsaved changes to the form content and layout.

Creating a Form

1. Create a new page based on the **Form page** page type.
2. Enter a name for the page and a description in the editor area of which information the visitor is assumed to enter.
3. Select **Show statistics** if you want visitors to be able to see a compilation of all responses submitted to the website. If you do not specify this, only those that have access to the editorial interface will be able to see the results. This is often used when you want to create a question for which visitors can see the results of all the answers.
4. In **Form**, browse to specify which form is to be used.
5. The **Select Form** dialog opens and you can choose to **Select** or **Edit** an existing form, or **Create** an entirely new form.
6. When you are done, you can publish the page.

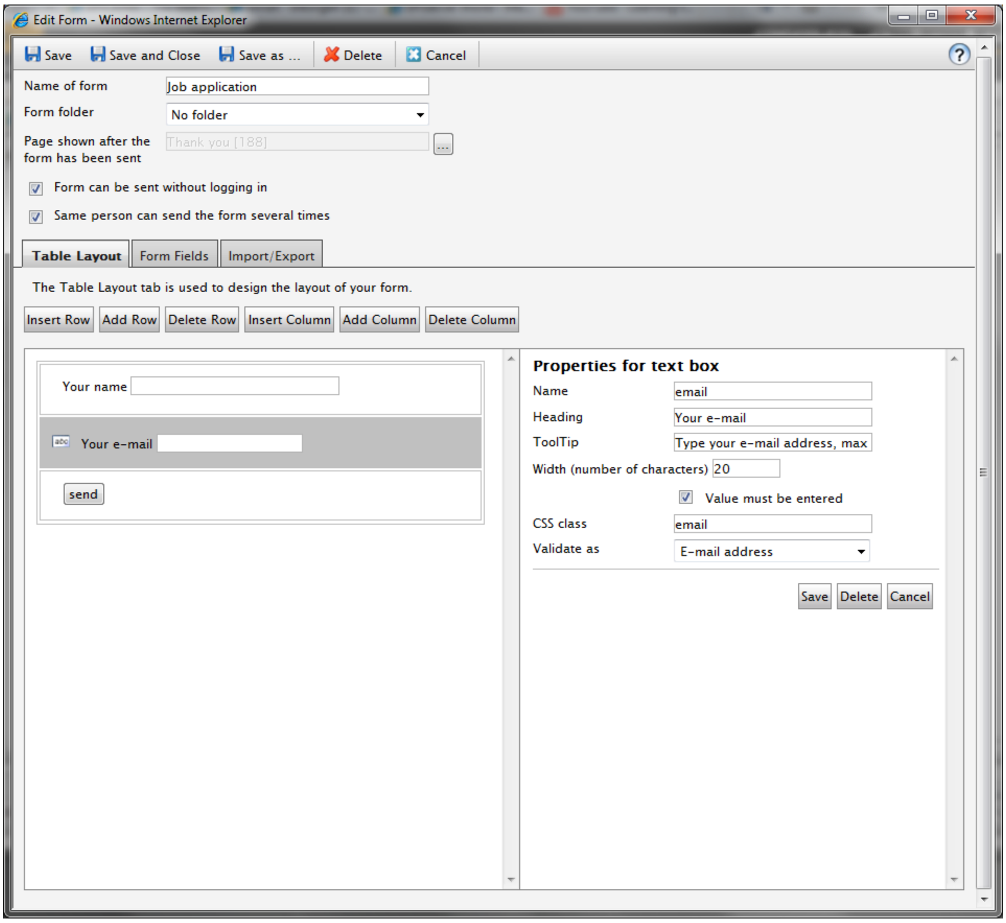
Editing a Form



1. In **Name of form**, enter a name for the form. If you are going to send the form by e-mail, the name will be shown in the **Subject** row in the e-mail message being sent. This name is also displayed in the list of available forms, so you can use this form on another page.
2. In **Form folder**, select in which folder to save the form.
3. Select **Form can be sent without logging in** if you want anyone on your website to be able to fill in the form. If it is not selected, the visitor must be logged in to reply.
4. Select the **Same person can send the form several times** if you want the same person (computer user) to be able to fill in the form several times. If it is not selected, visitors will only be able to fill in the form once per computer (a cookie is placed on the visitor's computer).
5. In **Page shown after the form has been sent**, you can point to a page that will be shown when a visitor submits a form. The page should be based on the **Standard page** page template.

Form Field Settings

When you have dragged a form field into a cell, the settings for the relevant field type will be opened to the right of the table. Depending on the field you have selected, you need to set various properties. Some properties exist in all types of field, and some in all input fields.



The following properties exist for most fields:

- **CSS class**. Defines a CSS class (format) for the field. The class must exist in the CSS file used for the website. Contact your system administrator for more information.
- **Name**. Used to identify the field in the database and is compulsory, but is not visible to visitors. It is easiest if you use the same name or a similar name to the one you use in the **Heading** field. You can only use A-Z, a-z, 1-9 and _ for this field. Spaces cannot be used.
- **Heading**. Used to let visitors know what they should enter in each field. Headings can either be created in a field of their own or in conjunction with the form field in question, depending on where you want the heading to be placed and how accessible you want the form to be. If you enter a heading in conjunction with the form field, it will be displayed to the left of the field. This alternative should be selected to make the form as accessible as possible.
- **ToolTip**. Gives visitors more information about what should be filled in. The tooltip appears when you place the cursor over the form field.
- **Value must be entered**. Select this check box if you want to force the visitor to enter a value. If the check box is not selected, an error message will appear saying that the field must be filled in. The error message refers primarily to the **Heading** in the field. If you do not have a heading, it refers to whatever you have entered in the **Name** field.
- **Validate as**. Used to check whether the visitor has filled in the right type of information in a field. You can for example check whether it is an e-mail address, check a date format or various types of numbers.

You must click **Save** for each form field in order to save the properties. If you want to delete a field, click **Delete** under the field's properties.

When the form is complete and all fields and their properties have been saved, save the entire form by clicking **Save**, **Save and Close** or **Save as...** at the top of the **Edit Form** dialog. You will return to the **Select Form** dialog, where you click **Use** to indicate that you want to use the form on the page and then publish.

Delete a form by clicking **Delete** at the top of the Edit Form or Select Form dialogs.

About the Field Types in the Form

Text box

Use the *text box* field type for visitors to type short text information as a row.

- In the **Width** field, enter how wide the field is to be in terms of characters.

Text area

Use the *Text area* field type for visitors to type free text in a large area. You can determine the width of the area in terms of characters and how many rows the field should have.

- In **Width**, enter how wide the field is to be in terms of characters.
- In **Height**, specify the number of rows that the text area should have.

Drop-down list

Use the *drop-down list* field type for visitors to select an alternative from a drop-down list.

- In **Options** group, specify the alternatives that are available in the drop-down list.
- The **Name** field in the **Options** group box indicates the alternative available in the drop-down list, whilst the **Value** field is used to identify the field in the database. Enter an alternative by filling in the fields and clicking **Add**.
- The **Preselected** check box indicates which of the alternatives is selected by default.
- Delete and sort the order of the alternatives by clicking the icons to the right.

Radio button

Use the *radio button* field type for visitors to select only one alternative from a radio button list.

- In the **Placement** field, select whether you want the radio button to be shown horizontally or vertically.
- In **Options** group, specify the alternatives that are available as radio buttons.
- The **Name** field in the **Options** group box indicates the name of the radio button, whilst the **Value** field is used to identify the field in the database. Enter an alternative by filling in the fields and clicking Add.
- The **Preselected** check box indicates which of the alternatives is selected by default.

Check box

Use the *check box* field type to give visitors a list of various alternatives, from which they can select one or more alternatives.

- In **Placement**, select whether you want the check box to be shown horizontally or vertically.
- In **Options** group, specify the alternatives that are available as check boxes.
- The **Name** field in the **Options** group box indicates the name of the check box, whilst the Value field is used to identify the field in the database. Enter an alternative by typing the fields and clicking **Add**.

- The **Preselected** check box indicates which of the alternatives is selected by default.
- Delete and sort the order of the alternatives by clicking the icons to the right.

Button

Use *button* field type to give visitors a button to press when they want to send in the form they have filled in.

- In **Button text**, type the text to be displayed on the button.
- In **Result from sending**, select what will happen when the visitor sends in the form. You can select to save it in a database and/or send it by e-mail. You can also specify that the form should be sent to a web address, where you can have a separate application dealing with the information. Different fields are shown depending on the option you select.
- In **Send e-mail to this address**, type the e-mail address that a message is to be sent to when a visitor posts a form. Send e-mails to several recipients by entering the e-mail addresses separated by semi-colons, for example, **david.smith@company.com;helen.jones@company.com**.
- In **E-mail address of sender**, type the sender’s address that should be in the message sent.
- In **E-mail subject**, type the heading text that is to be shown in the subject box in the message that is sent when a visitor sends a form.
- In **Send to specified URL**, type the web address where you want the information to be sent.

Heading

Use **Heading** to let visitors know what they should enter in each field.

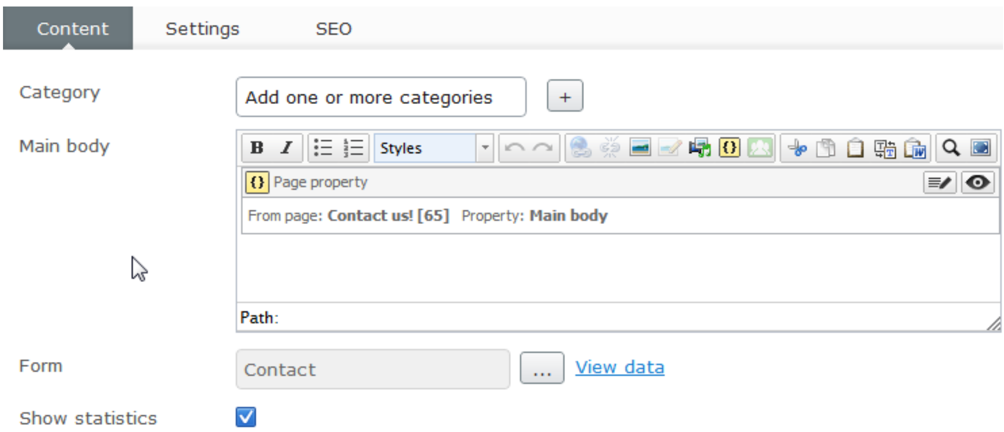
- In **Text** , type the text that is to be shown to visitors.

Horizontal rule

Use **Horizontal rule** if you want to insert a horizontal rule into the form, for example, to improve the design of the formal rule.

Retrieving Form Data

If you choose to save the information submitted in your form in the database, you can find all the forms with their submitted information by selecting *content settings*.



Retrieve form data from the database as follows:

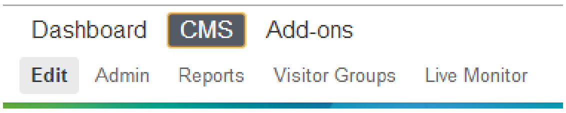
1. In **Form**, click **View data** for the form page you want to retrieve data.
2. Select the form from which you want to retrieve data. Usually there is only one form to select.
3. Enter a from and to date if you want to specify your search by time. These fields can be left empty if you want to retrieve all the postings made.
4. Select **Show data for all pages** if you want to retrieve data from all the pages that use the selected form.
5. Enter the number of hits you want per page in the **Number of hits per page field**. Click **Search**.

The search hits are listed below the search form. If there are a lot of hits, you can browse amongst them here and you can also delete postings.

- To delete certain postings from the form data, select the postings to be deleted and click **Delete Selected Postings**.
- Click **Delete All Postings** to delete all the form data that has been received.
- Click **Export to Excel** to export the data to Microsoft Excel. To do this, Excel must be installed on your computer.
- Click **Export to XML** to export the form data to an XML file.

Reports

Open the Report Center by selecting **Reports** in the EPiServer CMS Global Menu. Report Center opens in a separate window and remains open until you choose to close it.

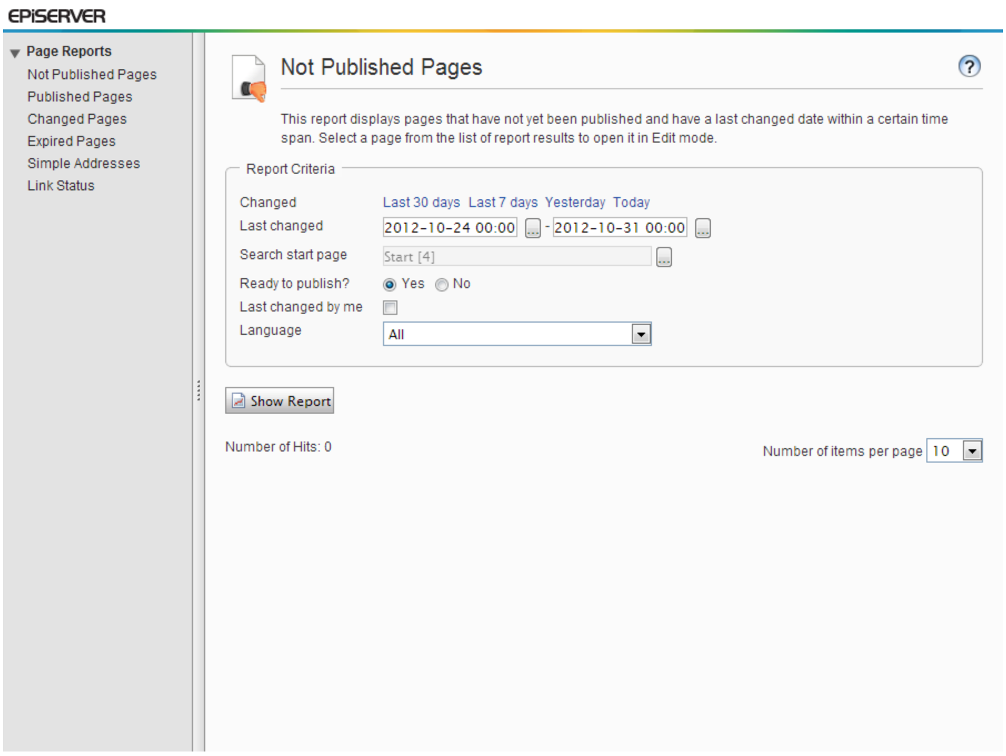


For each report, the pages included in the search results are opened in the editorial interface when you select a page link in the search results table. You may want to redesign your work area to make it easier to work with Report Center by minimizing your EPiServer CMS browser size and moving the Report Center browser so that both browsers are visible simultaneously. This is only recommended if your screen resolution is at least 800 x 600 pixels.

There are several page reports in the standard installation of EPiServer CMS, although other customized reports may also be available in your EPiServer CMS site. Only the page reports that are included in the standard installation of EPiServer CMS are described here.

Not Published Pages

This report displays pages that have not yet been published and have a last changed date within a certain time span.



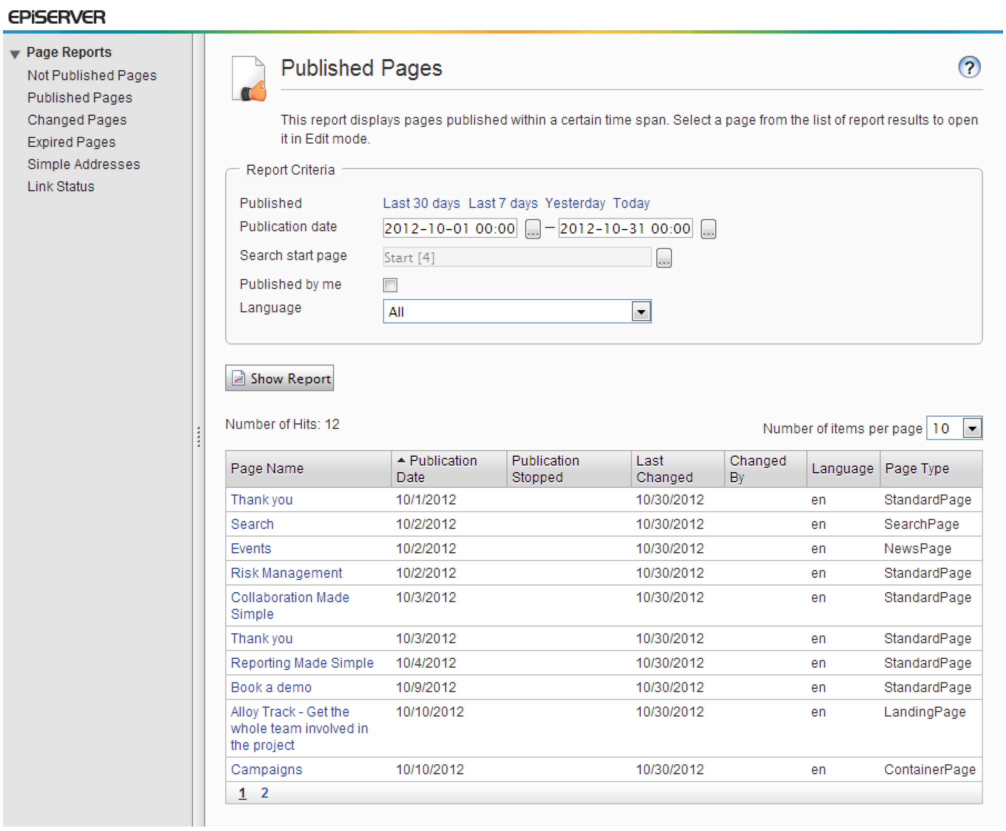
Create a report as follows:

1. In the **Report Criteria** group box, select a predefined time span by clicking the appropriate link or enter a time span in the date boxes.

2. In the **Search start page** field, browse to the page in the tree structure that you want to be the starting point for the search. This start page will also be included in the search.
3. It is possible to restrict your search to pages that have status **Ready to Publish** by selecting **Yes** or **No** in the **Ready to publish?** field.
4. Select the **Last changed by me** check box if you only want to search for pages that you have last changed.
5. In the **Language** drop-down list, select which page language you want the search to include. (This drop-down list is only available if you have a globalized website.)
6. Select how many items you want to appear on each page of the report results in the **Number of items per page** field.
7. Click **Show Report**. The results can be sorted by clicking a column heading. Open a page in edit mode by clicking the page name in the Page Name column.

Published Pages

This report displays pages published within a certain time span.



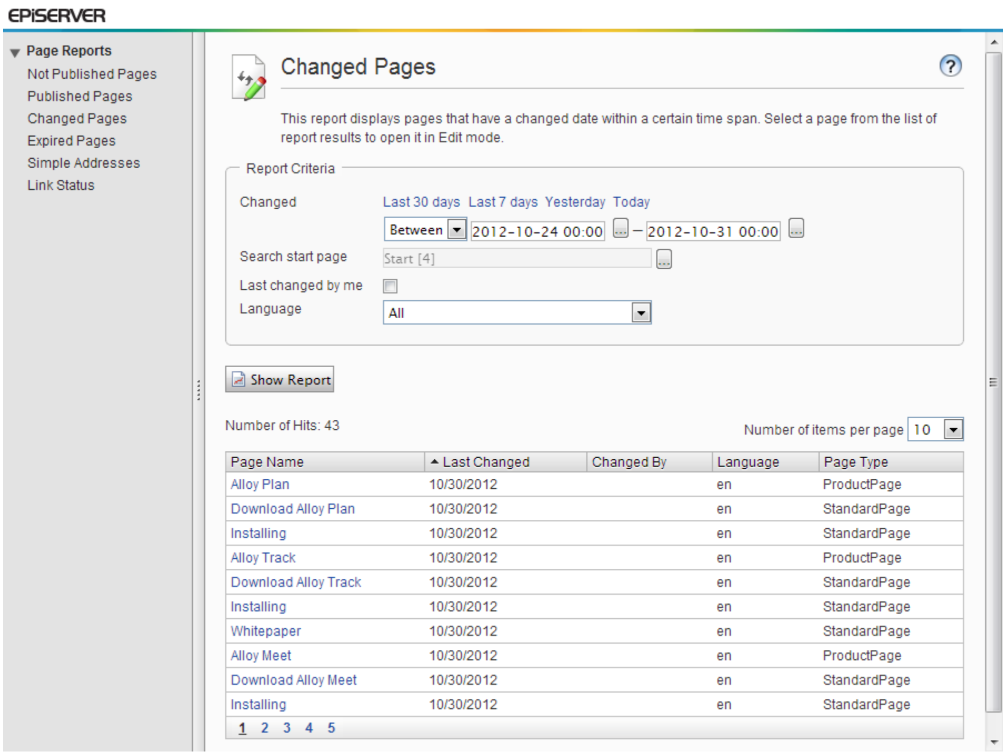
Create a report as follows:

1. In the **Report Criteria** group box, select a predefined time span by clicking the appropriate link or enter a time span in the date boxes.
2. In the **Search start page** field, browse to the page in the tree structure that you want to be the starting point for the search. This start page will also be included in the search.
3. Select the **Published by me** check box if you only want to search for pages that you have last published.

4. In the **Language** drop-down list, select which page language you want the search to include. (This drop-down list is only available if you have a globalized website.)
5. Select how many items you want to appear on each page of the report results in the **Number of items per page** field.
6. Click **Show Report**. The results can be sorted by clicking a column heading. Open a page in edit mode by clicking the page name in the **Page Name** column.

Changed Pages

This report displays pages that have a changed date within a certain time span.

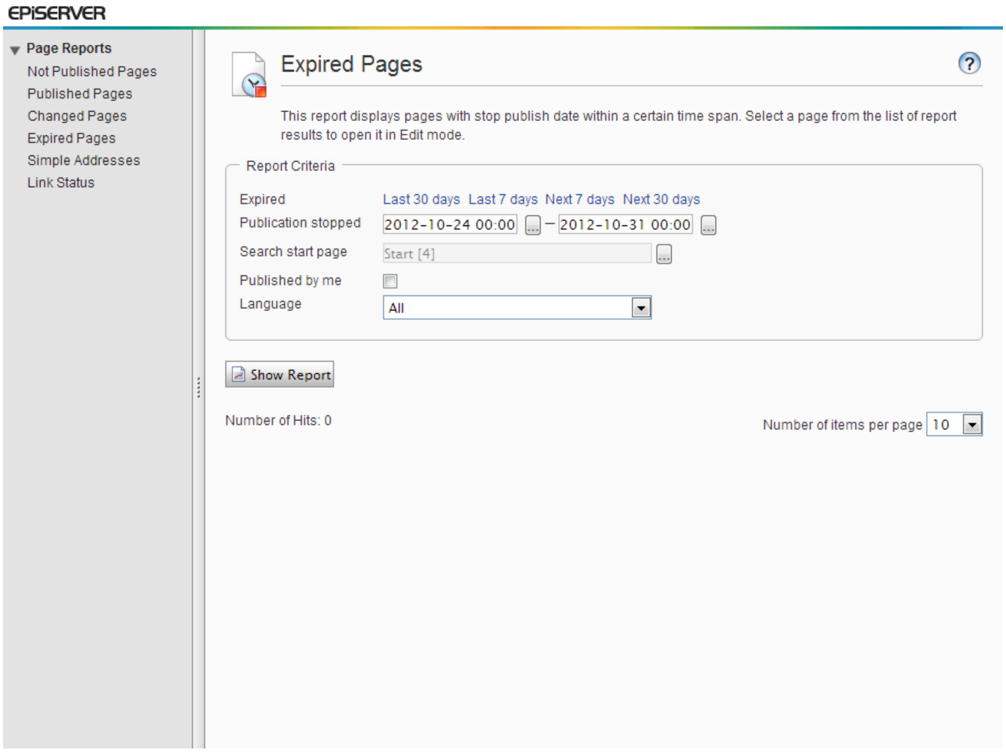


Create a report as follows:

1. In the **Report Criteria** group box, select a predefined time span by clicking the appropriate link or enter a time span in the date boxes.
2. In the **Search start page** field, browse to the page in the tree structure that you want to be the starting point for the search. This start page will also be included in the search.
3. Select the **Last changed by me** check box if you only want to search for pages that you have last changed.
4. In the **Language** drop-down list, select which page language you want the search to include. (This drop-down list is only available if you have a globalized website.)
5. Select how many items you want to appear on each page of the report results in the **Number of items per page** field.
6. Click **Show Report**. The results can be sorted by clicking a column heading. Open a page in edit mode by clicking the page name in the Page Name column.

Expired Pages

This report displays pages with stop publish date within a certain time span.

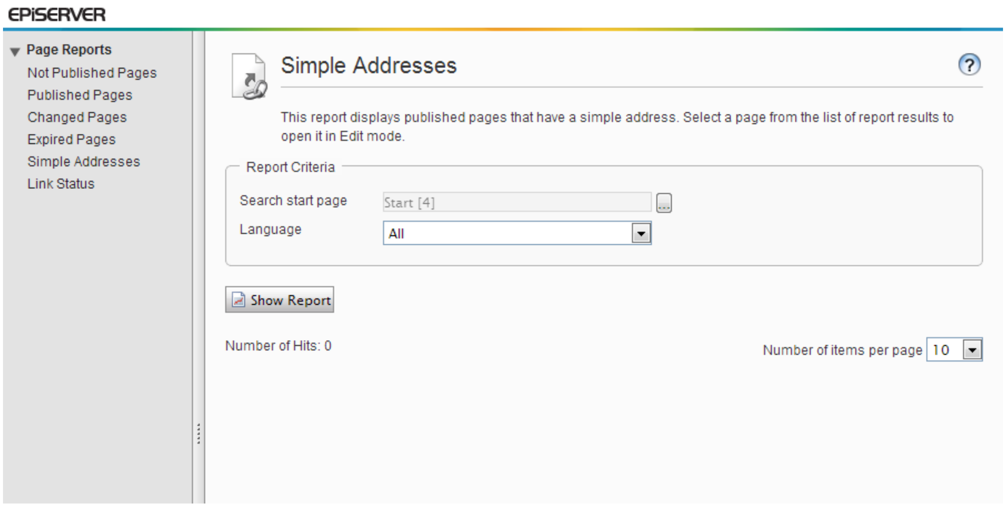


Create a report as follows:

1. In the **Report Criteria** group box, select a predefined time span by clicking the appropriate link or enter a time span in the date boxes.
2. In the **Search start page** field, browse to the page in the tree structure that you want to be the starting point for the search. This start page will also be included in the search.
3. Select the **Published by me** check box if you only want to search for pages that you have last published.
4. In the **Language** drop-down list, select which page language you want the search to include. (This drop-down list is only available if you have a globalized website.)
5. Select how many items you want to appear on each page of the report results in the **Number of items per page** field.
6. Click **Show Report**. The results can be sorted by clicking a column heading. Open a page in edit mode by clicking the page name in the Page Name column.

Simple Addresses

This report displays published pages that have a simple address.

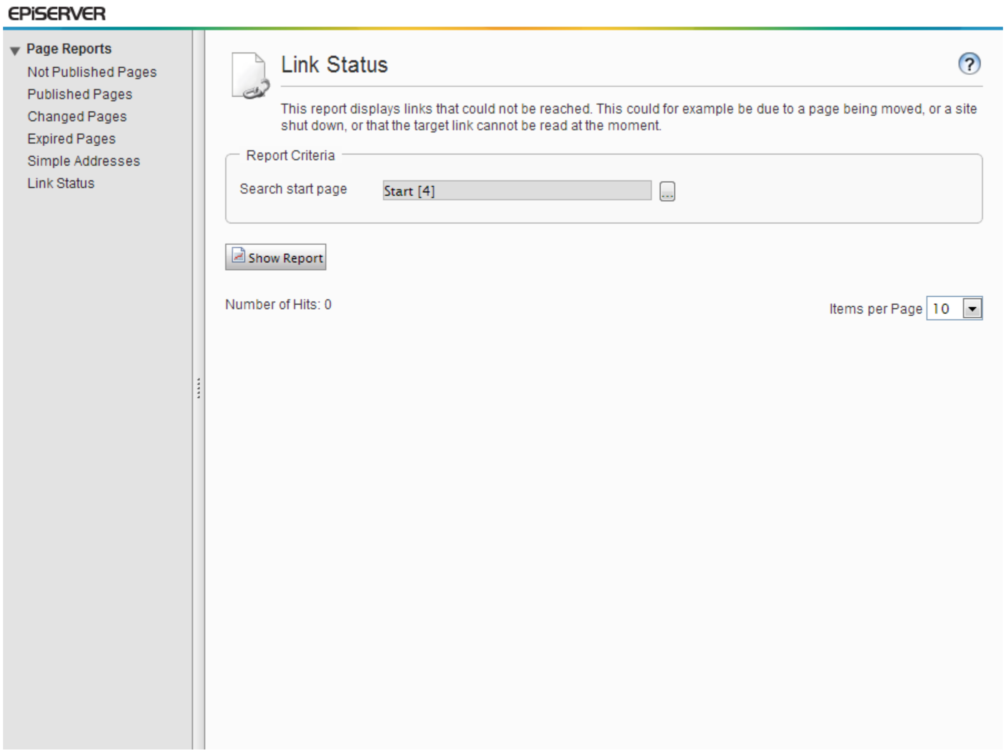


Create a report as follows:

1. In **Search start page**, browse to the page in the tree structure that you want to be the starting point for the search. This start page will also be included in the search.
2. In **Language**, select from the list which page language you want the search to include. (This option is only available if globalization is enabled on the website.)
3. In **Number of items per page**, select how many items you want to appear on each page of the report results.
4. Click **Show Report**. The results can be sorted by clicking a column heading. Open a page in edit mode by clicking the page name in the **Page Name** column. The report results also show whether the page is visible in menus and the published status.

Link Status

The **Link Status** report is the result of the **Link Validation** scheduled job. This report displays links that could not be contacted by EPiServer CMS in the link check job, for example, if a page has been moved, a site has been shut down, or a target link cannot be read at the moment.



Create a report as follows:

1. Under **Report Criteria** > **Search start page**, select the browse button to choose a start page in the page tree structure.
2. Click **Show Report**. The results can be sorted by clicking a column heading. Open a page in edit mode by clicking the page name in the **Broken URL** column. In **Items per page** you can set the maximum number of items to be displayed per page.

Using Workflows

EPiServer CMS supports various types of workflow, which means that you can be assigned a task or assign a task to others according to a predetermined flow. An editor could, for example, create a page that has to be approved by one or more individuals before it is published. Who approves the page is decided in advance in the workflow, and the task is assigned to various individuals.

Out-of-the-Box Workflows

The workflows are set up by your EPiServer CMS supplier in cooperation with your system administrator. The following workflows are delivered with the standard installation: Two for approval of pages, one for managing several languages and one for requesting feedback.

Your system administrator can customize, change and create more workflows.

Starting Point in the Workflow

When you set up one or several workflows for the website, you select whether they can be started manually or automatically. They usually start automatically at a certain location in the tree structure.

In most cases, the event that starts a workflow has already been decided. For example, it could be an editor submitting a page for publication to a certain place in the tree. A workflow can be triggered by different events in EPiServer CMS. Everything from saving a page to uploading a document. The event that starts the workflow constitutes the starting point of the workflow. When the page is sent in for publication, a task is sent to person number two in the workflow saying that person has a task to carry out. What the task is depends on how the workflow is set up.

Starting a Workflow Manually

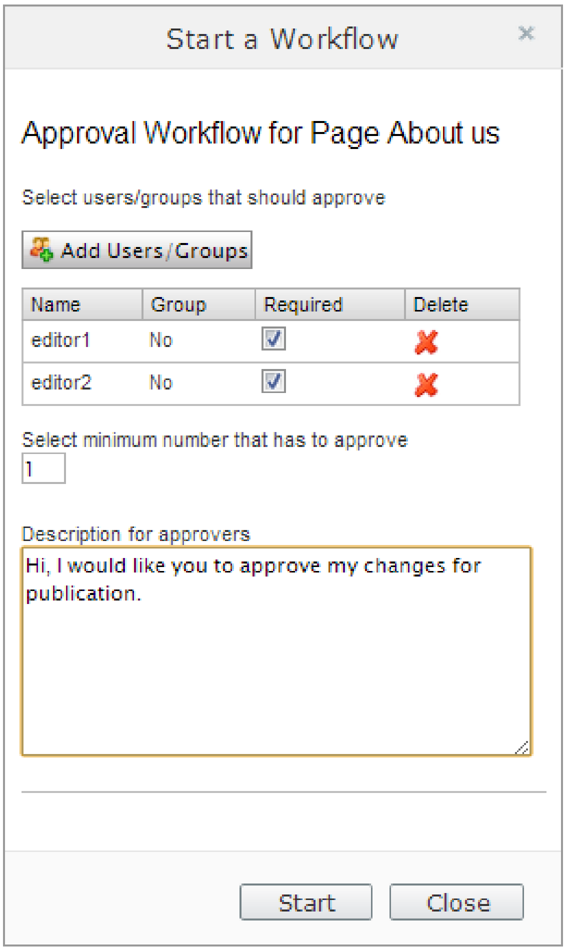
In a typical EPiServer CMS installation, the workflow for requesting feedback is suitable for manual start. The purpose of this workflow is that an individual editor should be able to receive feedback about the changes on the page.

Start a workflow manually as follows:

1. Create or change content on a page or block.
2. Toggle *Content Settings* and select **Tools** > **Start a Workflow**.
3. Select the workflow that you want to start.
4. A dialog opens and you can enter the setting for this particular type of workflow.
5. Example for Parallel Approval workflow: Click **Add Users / Groups** and select which group or user will receive the task to approve the changes you have made on the content. Click **OK**.
6. When you have made the settings, select **Start**. The workflow now starts, and a task is sent to the group or user you have selected.

> ***Note*** If you are not given any workflows to select from, it is because workflows cannot be started manually in your installation.

Note As the process owner of a workflow, you always have the right to delete or end a workflow even if all the tasks have not been completed. Usually, the person who creates the page is also the process owner.



Handling Your Assigned Tasks

Tasks in a workflow that has been assigned to you personally or anyone in your group are shown on the **Tasks** tab > **My Tasks**.

To take action on the tasks, click the link and you will be redirected to that content. To read the message in the task, click **View Task** on the notification bar.

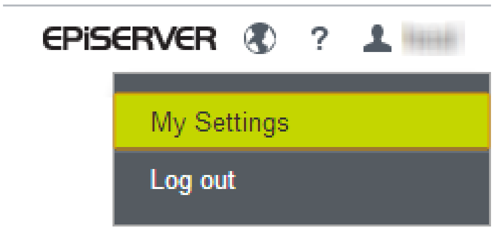
When you are done with reviewing the page, publish the changes.

Customizing Your Settings

When you start working with EPiServer CMS, you should begin by exploring available customization settings. You can add your e-mail address and change the user interface language.

My Settings

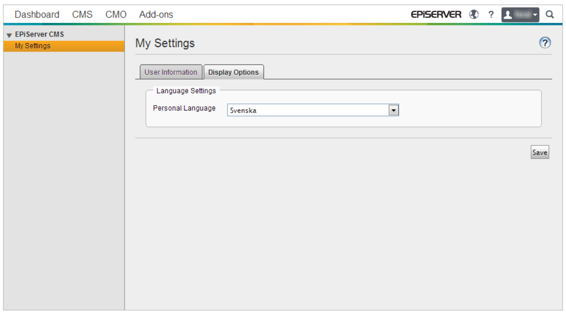
Under **My Settings** you manage the user information options and the display settings for the user interface. To access these options, select **My Settings** under **Administrator** in the upper right corner of the top menu.



User Information

By filling in your personal details such as user name and e-mail address on the **User Information** tab under **My Settings**, you identify yourself so that the system can communicate with you for instance when an automated workflow is used.

Depending on how your EPiServer CMS installation is set up, you might also be able to manage your password information from the **User Information** tab. Check with your system administrator what applies to your website.



Display Options

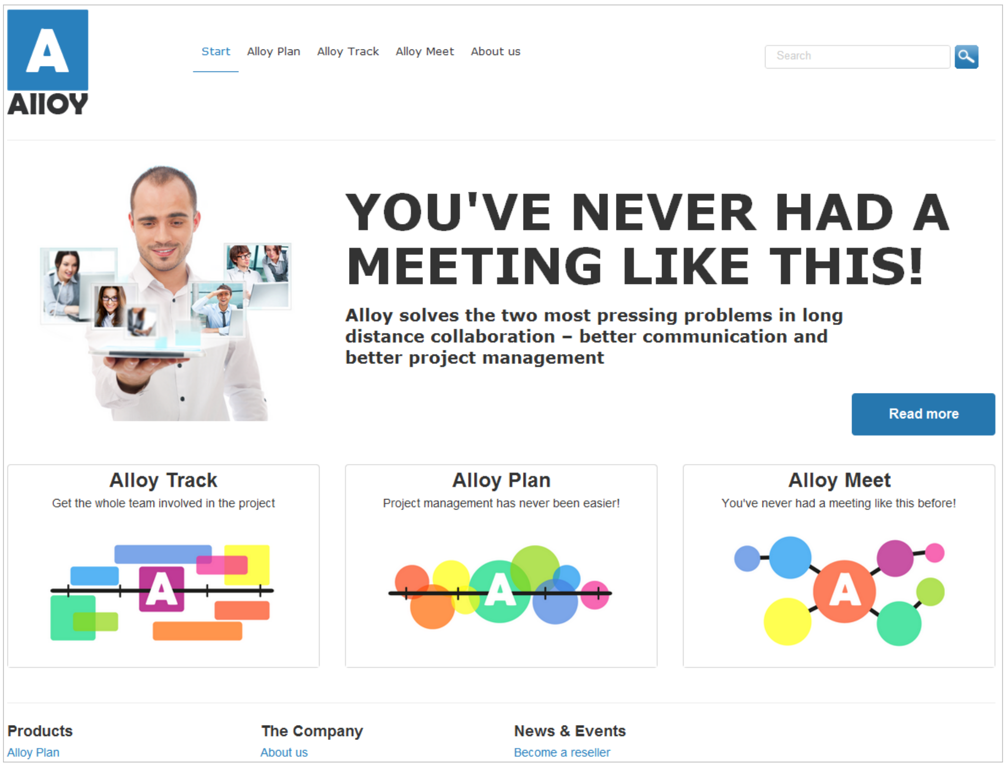
On the **Display Options** tab under **My Settings**, you can choose which language you want to work with and which symbols you want to see in the tree structure.

Under **Personal Language** you can choose the system language, which is the language in which the user interface is presented, in other words the main menus, tabs, right-click menus, etc.

Sample Site

Introduction

The "Alloy" sample site is a fully functional website demonstrating the features of EPiServer CMS. The templates make use of built-in functions such as *categorization* and *blocks*, to illustrate the many possibilities when creating dynamic websites. The template package is available when downloading and installing EPiServer CMS.



The sample templates are based on the responsive design concept, meaning that the content display will adapt to the device and resolution used when viewing the site. Content is managed as components through the use of blocks or pages which can be dropped in content areas for adapted display. Depending on the space available, the entire content or a selection of it will be displayed in 1/3, 2/3 or full width.

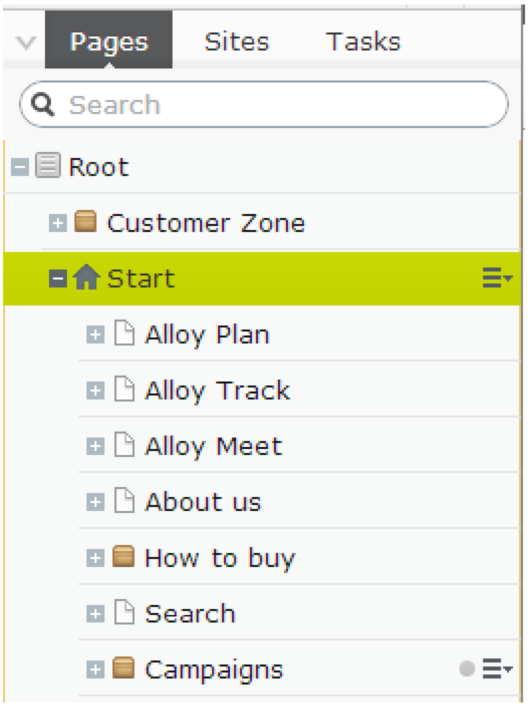
Site Structure

There are many different ways of building websites and functions with EPiServer CMS. The sample site described here is merely an example intended to provide guidance and inspiration.

The "Alloy" sample site, illustrating the website of a fictive company, is built with the following structure:

- **Start** page, the "entrance" to the site with *site navigation and footer information*.
- Product presentation sections for **Alloy Plan**, **Alloy Track** and **Alloy Meet**, with *product pages*.
- **About us**, information describing the company, with *contact pages*.
- **Search** is based on the *search page type*, containing functionality for search and display of search results.

- **Campaigns** is a container page with an example of a campaign page based on the *landing page* page type.



Note that some pages will not have a display template for preview, since they are only used as **container pages**. Container pages have a special symbol in the page tree structure, refer to *Structuring the Website* for more information. Also, you cannot link to a container page.

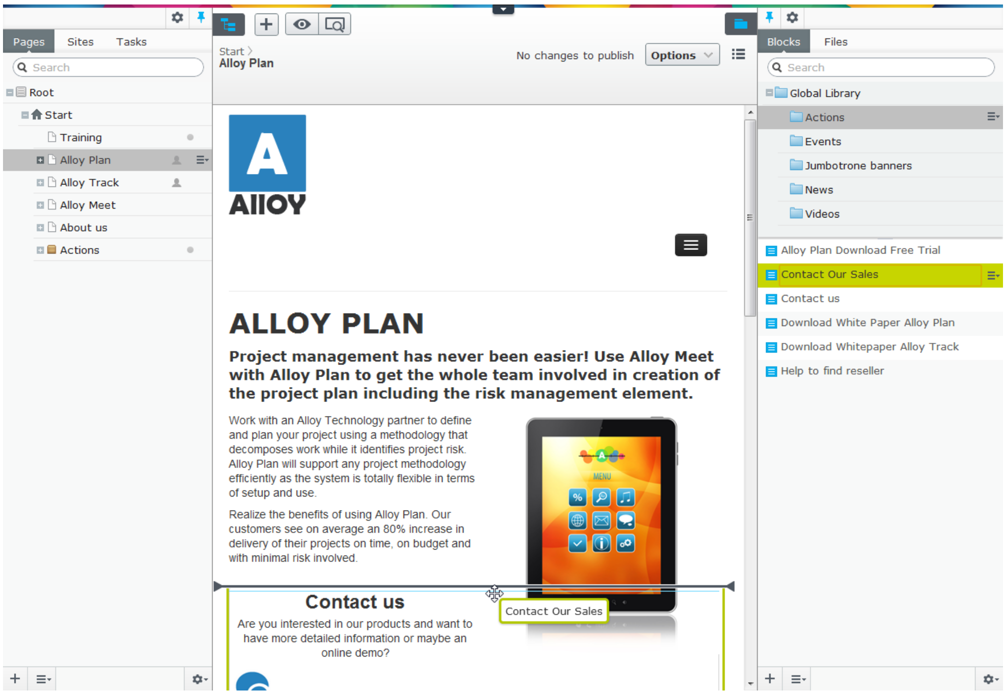
Sample Pages and Blocks

The sample site is built up by a number of page types and blocks specifically adapted for the "Alloy" type of company website. In the following the *page types* and *block types* included in the sample package are described in more detail, explaining the features and setup to end-users. If you are a developer, you can install the Alloy templates project in your development environment, to explore in more detail how the templates are built.

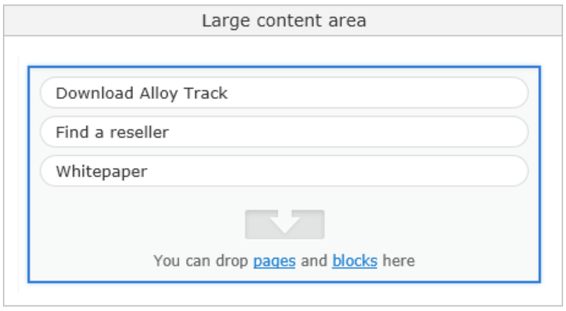
Page Types

Introduction

Page types contain the properties or fields, where editors enter information in a page. Each sample page type will have **content areas** where editors can either type information directly into an editorial area, or add content *blocks*. When hovering over a content area with existing content, you can see if the content is a block.



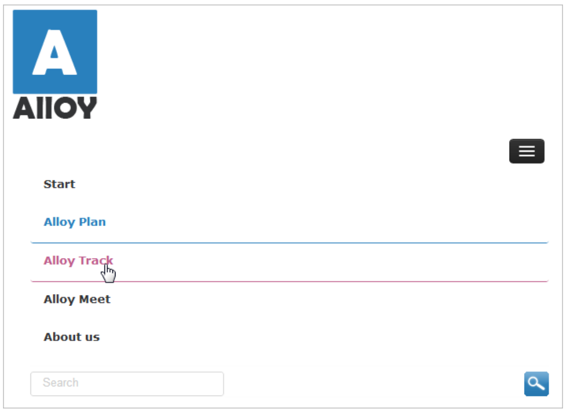
Content blocks can easily be added and rearranged, and pages from the page tree can also be dropped into a content area.



Page properties can be edited both through *direct on-page editing* or *forms editing*. However, some properties will only be available for editing through forms editing. Hover over the content area to find out which properties you can edit directly in the page. In the following we will describe some common specific features of the sample page types.

Renderings

The display of the content will adapt depending on the device and resolution used for viewing the content. For instance, viewing the site with a mobile device will cause the menu area at the top to convert into a drop-down button. In EPiServer CMS, it is possible to *preview page using different channels and resolutions*.



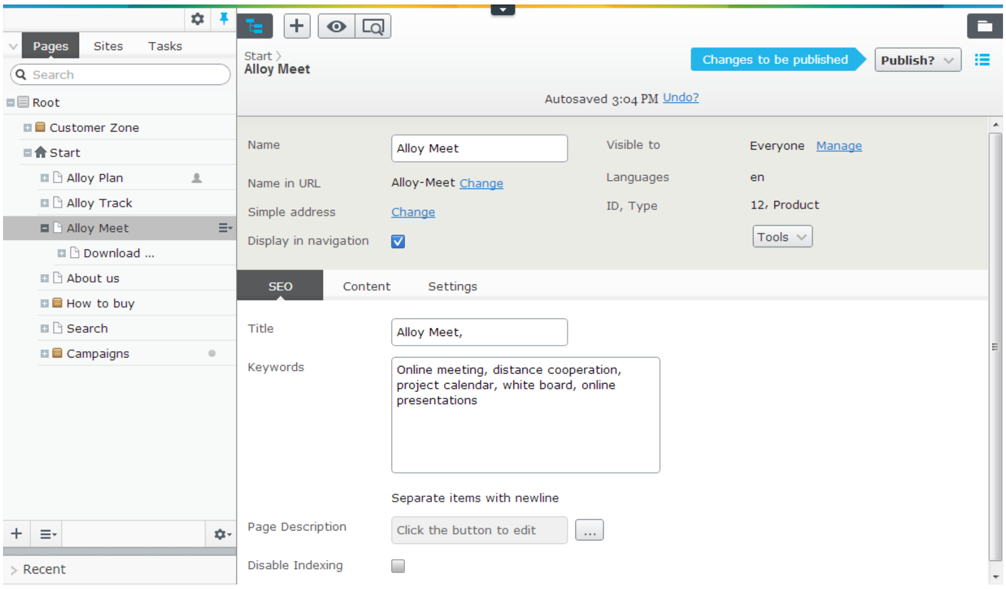
The page types will also have built-in **alternative renderings**, defining exactly how the content should be scaled and adapted for display in full width, 1/3 or 2/3 view areas. Depending on the space available, parts of the content will be rendered, for instance the heading and first part of the main body.

SEO Information

When opening the page in forms editing, the sample pages have an **SEO** tab. This is where you add SEO information to be used for search engine optimization (SEO), when the page is indexed and will appear in search results.

The following **SEO** properties are available:

- **Title** - add a display title for the page.
- **Keywords** - add a selection of appropriate keywords describing the content.
- **Page description** - add a short summarizing description of the content.
- **Disable indexing**- selecting this option will exclude the page from being indexed by search engines.



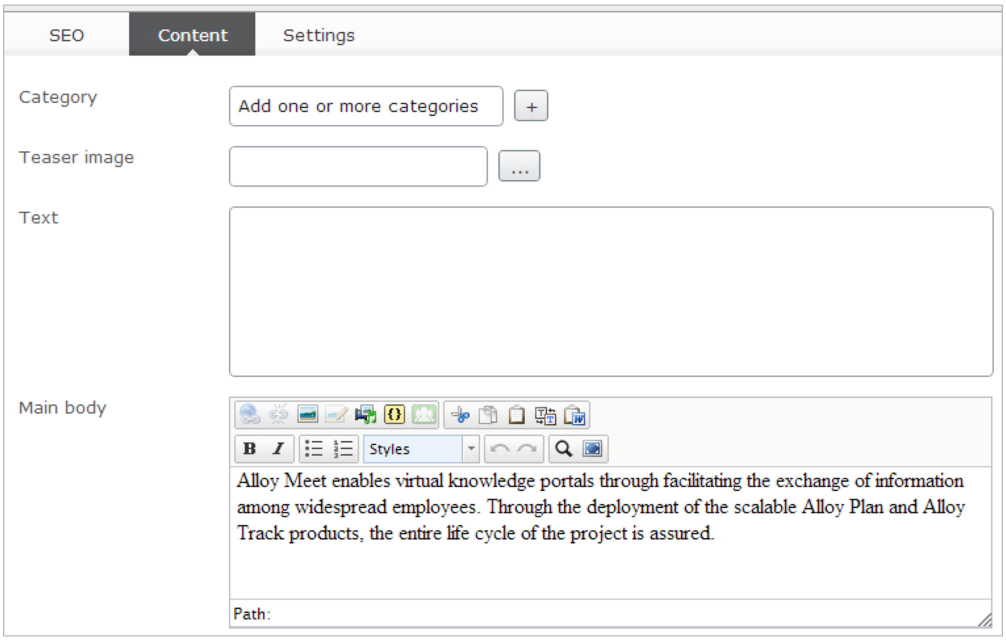
In some cases this meta data information will also be used for display when a page is dropped in a content area. This is the case for instance for the *Landing Page* and *Contact Page* page types.

Content

The specific properties available under the **Content** tab in Forms Editing, will differ depending on the page type. For instance you can have a Main body property providing all the functionality of the *EPiServer CMS editor*. You can also have a content area where you can drop *content blocks* or other *pages*.

The following properties are available for all pages:

- **Category** - used for categorizing the content.
- **Teaser image** - a display image used when the content is displayed in a content area.
- **Text** - this text will be displayed as a teaser for the content when the page is displayed in a content area.



Other Properties

Categories

Some of the functionality in the sample templates is based on the use of *categories*. For this purpose a set of categories have been created, these can be viewed and administered from the EPiServer CMS administration interface. In this sample scenario, the categories reflect the products featured on the Alloy site. Depending on the category set for a page, the content will appear in various product related filtering. There is also a category based color coding used for instance in the *Product Page* page type, and in the *Page List* block.

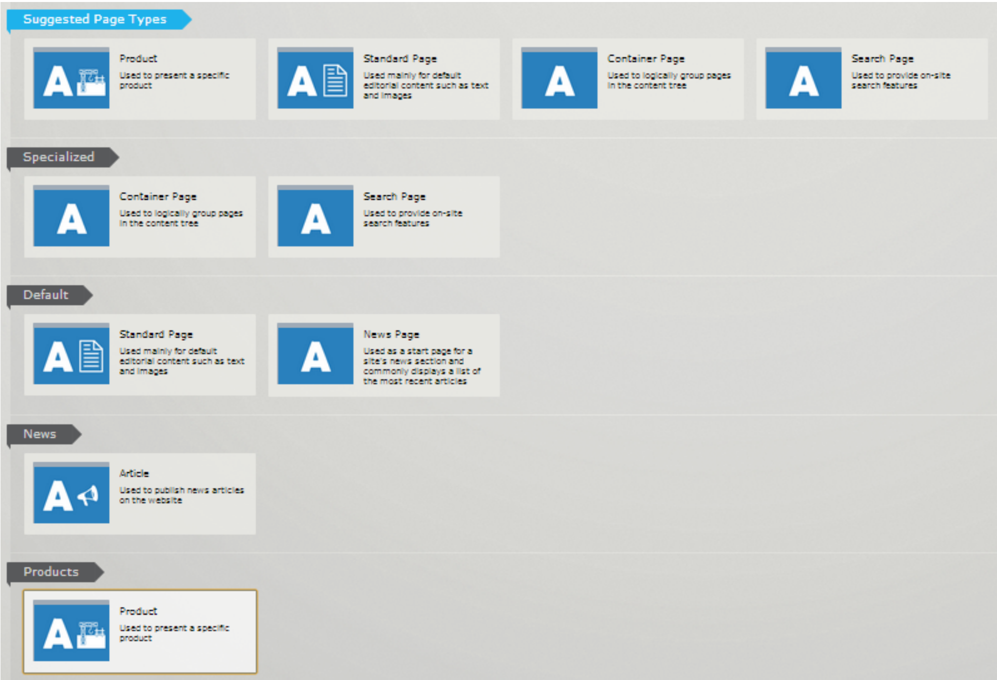
Hiding Header and Footer

The **Settings** tab contains properties with functionality that is available for all page types. Some of these properties are specific for the Alloy sample templates. Here you will find the properties **Hide site header/footer**. Selecting these options for a page will hide the site header and footer, which are defined on the *Start page*. This is useful if you want to create a page without the header and footer information, and this setting is default for the *Landing page* page type, which is intended for specific campaign pages where you want a different layout.

Note that there are no dynamic properties available for the Alloy sample templates.

Sample Page Types

The sample site has a set of page types for specific purposes, with built-in functionality that frequently occurs on many websites. Available page types on a site can be categorized to make selection easier for editors. Note that not all page types existing on an EPiServer CMS site may be available for selection in edit mode, and not all page types may be available under a specific node in the page tree. The availability of page types in edit mode can be controlled from the EPiServer CMS administration interface.

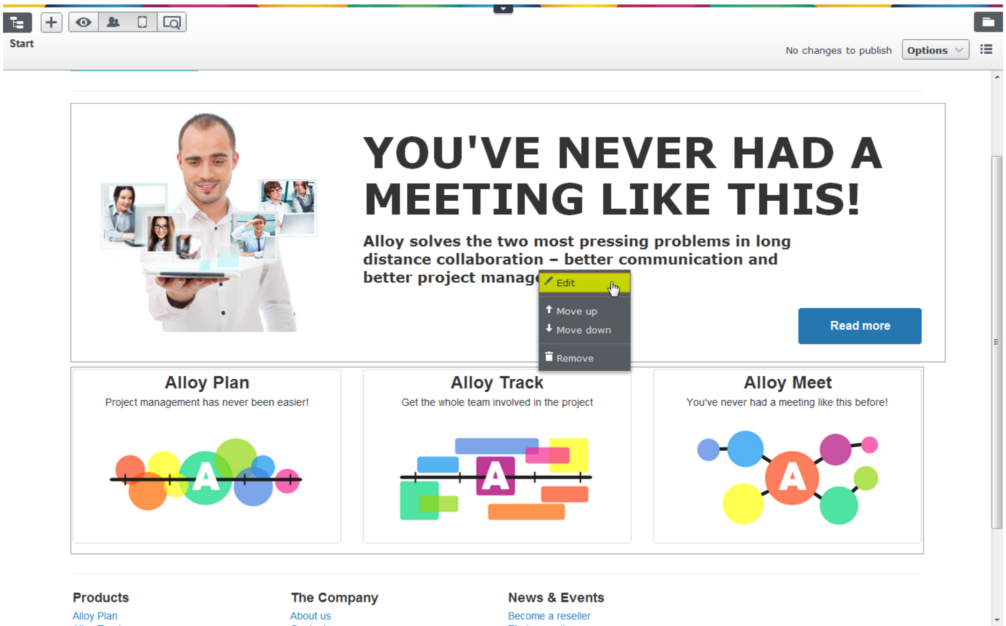


In the following sections of this documentation we will describe the features and specific properties of the page types included with the sample site. Use these sample pages as inspiration when creating your own pages.

Start Page

Introduction

The **Start Page** is built up using *block* functionality, in order to be able to create a dynamic entrance to the website. This way editors can easily modify the appearance of a page by changing and reusing content blocks to be displayed in various content areas. This makes it easy to promote for instance news and information from other parts of the website, or to expose campaign content.



The **Start Page** has a content area in the middle where editors can add content of their choice. In addition to this, the page type has a specific **header** and a **footer** area, where the navigation menu and footer content is inherited to other page types.

Header Area

The upper left corner of the start page contains the **site logotype** with a link to the start page, defined in the **Logotype** section of the **Site settings** tab in *forms editing*. The logotype can also be edited directly on the page. The rest of the header area contains the navigation menu and the search field. The first level navigation is built up using the page tree structure, where pages can be hidden using the *Display page in menus* option if desired. Refer to *Structuring the Website* for more information on how to work with the navigation menu in EPiServer CMS.

Content Area

The main content area in the middle has the following content:

- *Jumbotron banner* - a start page banner consisting of a block with a preformatted text, an image and an action button, displayed in full page width.
- *Product Page* - content from product pages adapted to be displayed in a content area, displayed in 1/3 page width.

Footer Area

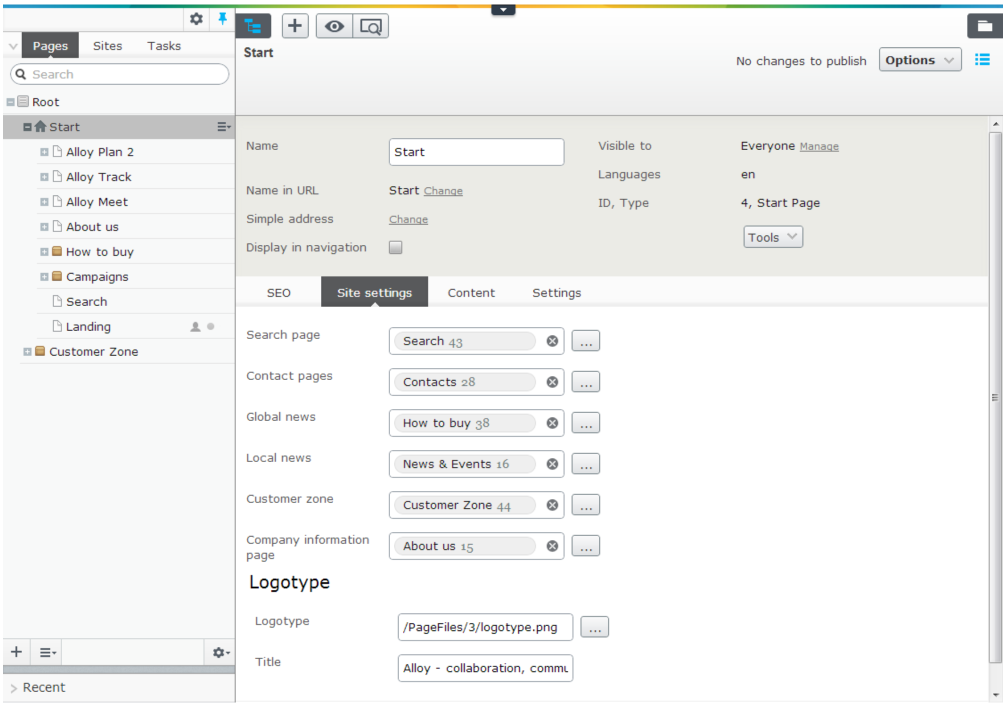
The footer area has four columns used for displaying links to "standard" information sections such as company information and main pages for news and press releases. There is also a section for a customer zone, a site area for logged in customers. The footer information appears on all the sample page types except the *campaign page*. The links are added on the **Site settings** tab of the start page as described below.

Properties

The following specific properties are available for the Start page in *forms editing* under the **Site settings** tab:

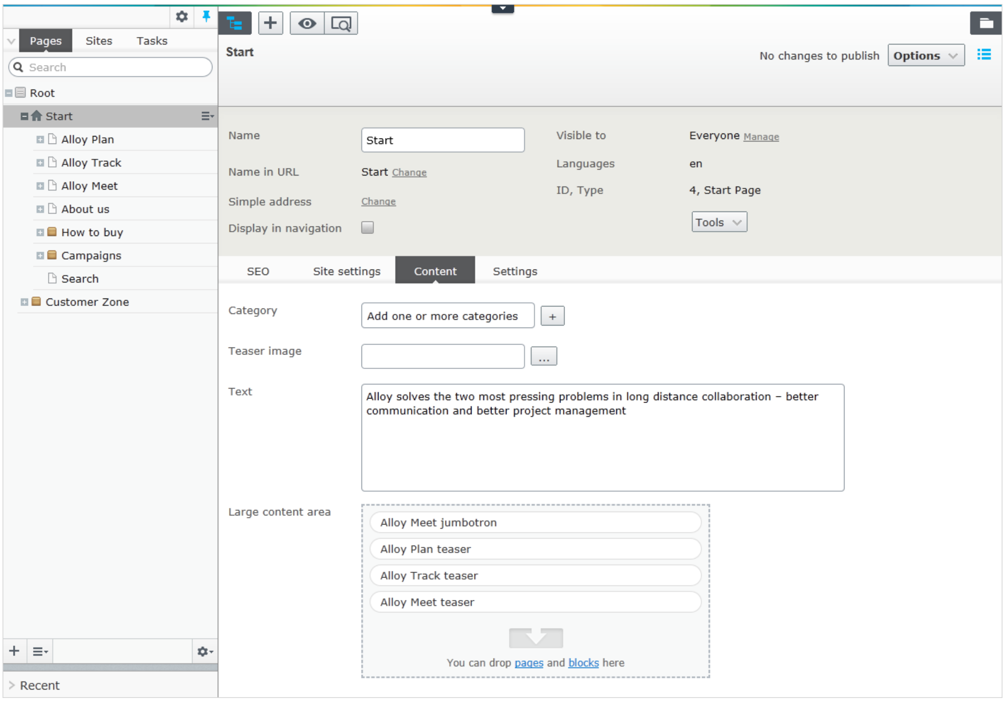
- **Search page** - add a link to the search page for the site.
- **Contact pages** - add a link to the contacts page you want to display in the footer.

- **Global news** - add a link to the global news page listing for display in the footer area, sub-pages will be displayed in the listing.
- **Local news** - add a link to a local news page listing for display in the footer area, sub-pages will be displayed in the listing.
- **Company information page** - add a link to the page section with company information, for display in the footer area. Sub-pages will be displayed in the listing.
- **Customer zone** - add a link to the customer zone extranet, if this exists on the website, for display in the footer area.
- **Logotype** and **Title** - add a logotype *image* with an image title, to be displayed in the upper left part of the header area. By default, the target link for the logotype image will be the start page.



The following specific properties are available for the Start page in *forms editing* under the **Content** tab:

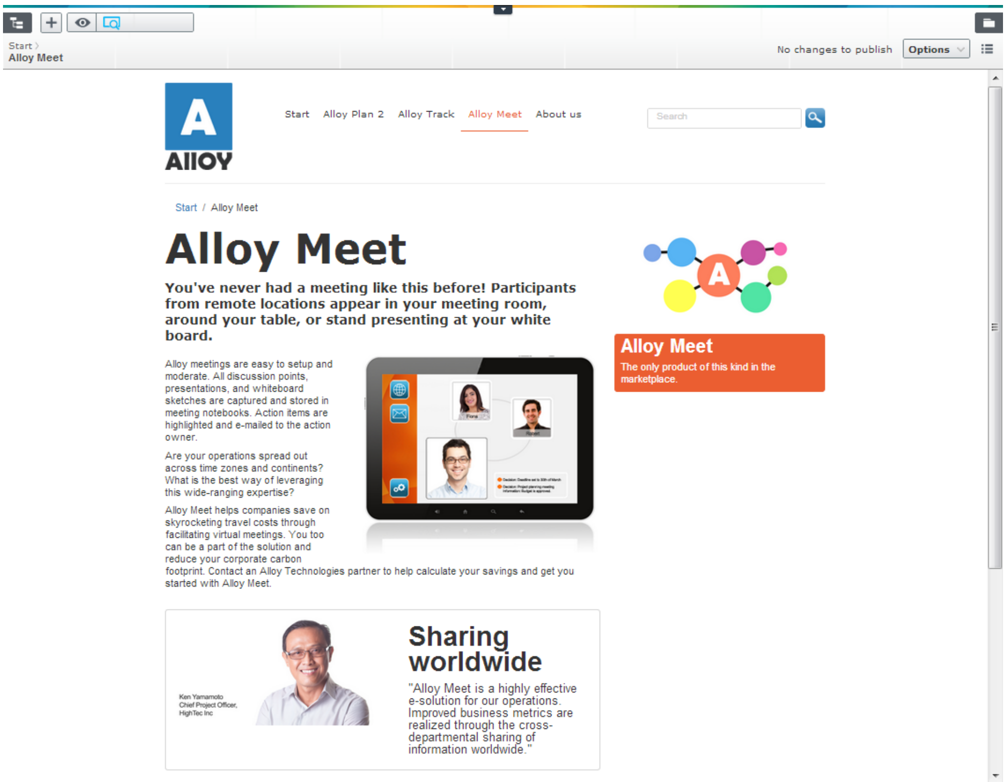
- **Large content area** - content area where you can add existing content blocks or pages. This is the main content area of the page, and here you can drop content blocks or pages from the page tree.



Product Page

Introduction

The **Product Page** is a central page where all the information about a product is maintained. This page type contains all the elements needed to display information for one product, and depending on where the information is shown, different page type elements will be used. You can for instance display a full product page or a product teaser in some other context.



The Product page has a **unique selling points** property with a built-in color coding based on product *category*. Here editors and marketers can add a unique selling point text for a product, and based on the product category selected for the page, the information will be highlighted using the color code for that specific product.

Categories are managed from the EPiServer CMS administration interface, and available for usage to categorize content in edit mode.

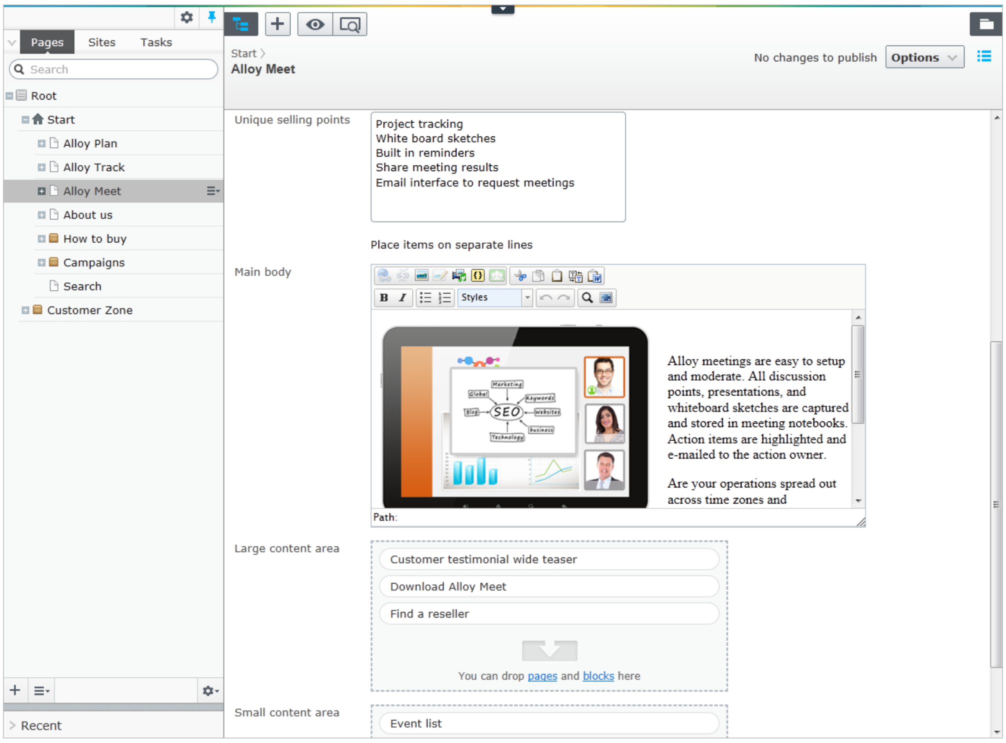
Content Areas

The Product page has three content areas. The upper middle section is available for direct editing, and here you can add a heading, an introduction and some main text. The lower middle section and the left hand column are both content areas, where you can drop *content blocks* or *pages*.

Properties

The following specific properties are available for the Product page in *forms editing* under the **Content** tab:

- **Unique selling points** - add the unique selling points for the product, a mandatory property when creating a product page, separate each added selling point with a line break.
- **Main body** - add product information in the text editor with all the functionality of the *EPiServer CMS editor* available.
- **Large content area** - content area where you can add existing content blocks or pages.
- **Small content area** - content area where you can add existing content blocks or pages.



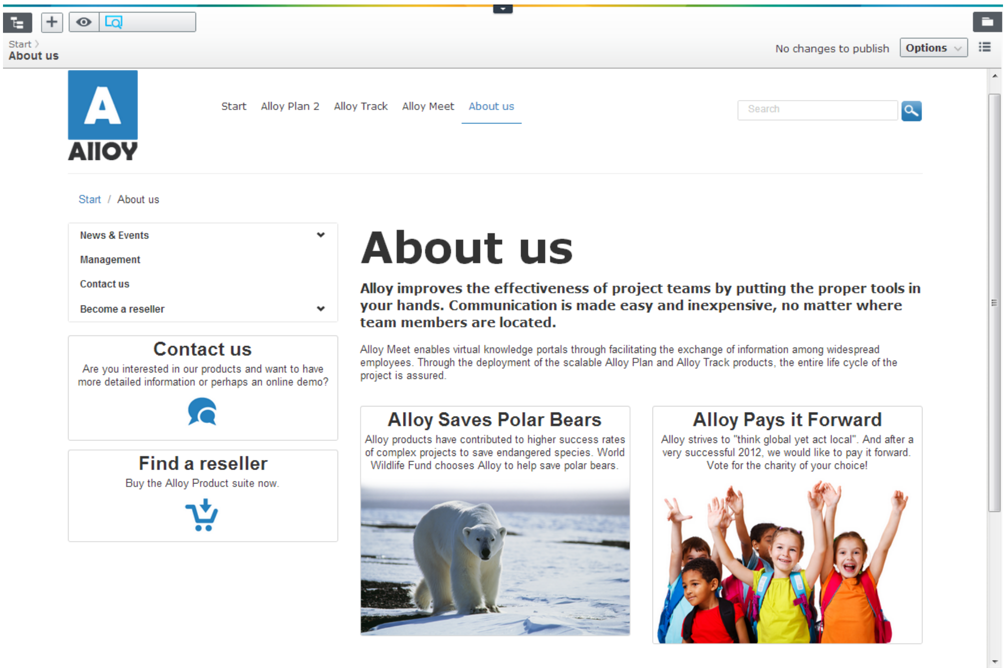
Renderings

The Product page has a "product teaser" feature which captures the heading, the short or long descriptions and the image, and adapts the information display to the space available. For instance, you can drop a product page into a content area, and it will display differently depending on the width of the drop area (1/3 or 2/3). The entire product teaser will become a link pointing to the actual product page. This is used on the *start page* of the sample site.

Standard Page

Introduction

The **Standard Page** page type is used for ordinary information pages with a navigation menu. This is useful if you want to display a traditional left column navigation. The page type also has content areas for direct editing as well as for adding blocks. Pages based on this page type can also be dragged-and-dropped into content areas for display.



Content Area

The upper left section of the Standard page is reserved for the left navigation menu, based on pages in the page tree structure. The page has three content areas, of which the one at the bottom expands over the entire page.

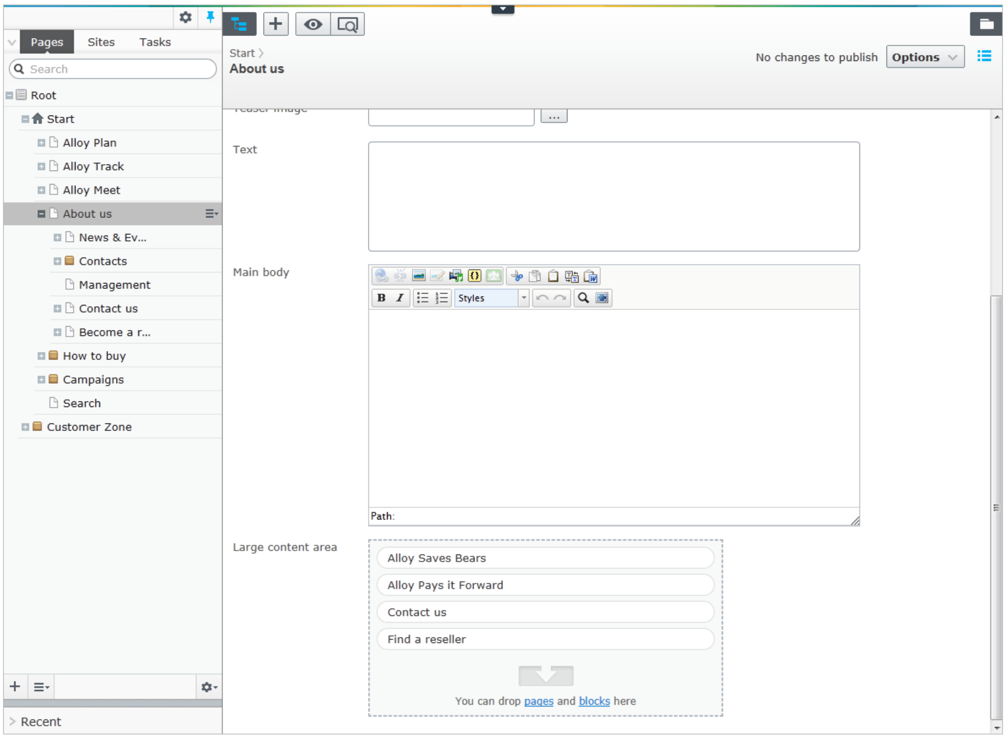
Left Navigation

The navigation displays the parent page as top level and a maximum of three levels of subpages, where pages can be hidden using the *Display page in menus* option if desired.

Properties

The following specific properties are available for the Standard page in *forms editing* under the **Content** tab:

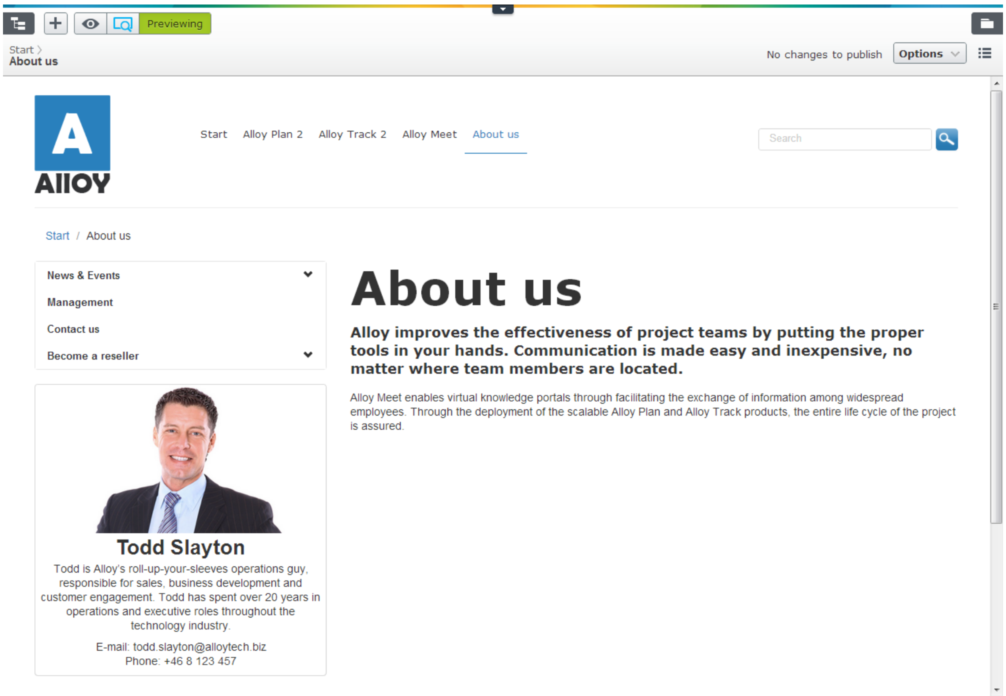
- **Main body** - add information in the text editor with all the functionality of the *EPiServer CMS editor* available.
- **Large content area** - content area where you can add existing content blocks or pages. Blocks added here will be displayed in the **lower middle section** of the page.



Contact Page

Introduction

The **Contact Page** page type is used for maintaining contact profile information such as name, profile image and title. Similar to a *Product Page*, this page types contains all the elements needed to display the profile information. The Contact page can be dropped in a content area of another page. Depending on where the information is shown and the space available, content in the different page type elements will be displayed. The information from the Contact page is also used when creating *Contact blocks*.



When a contact page based on the Contact page page type is added under the **Contacts** container page on the sample site, it will appear in the list of contacts available for selection when creating a *Contact block*.

Content Area

The content of a Contact page is collected from the **SEO**, **Contact** and **Content** tabs, and the page can only be edited through *forms editing*.

Properties

The properties described below are used to build the content of a Contact page in forms editing.

SEO tab

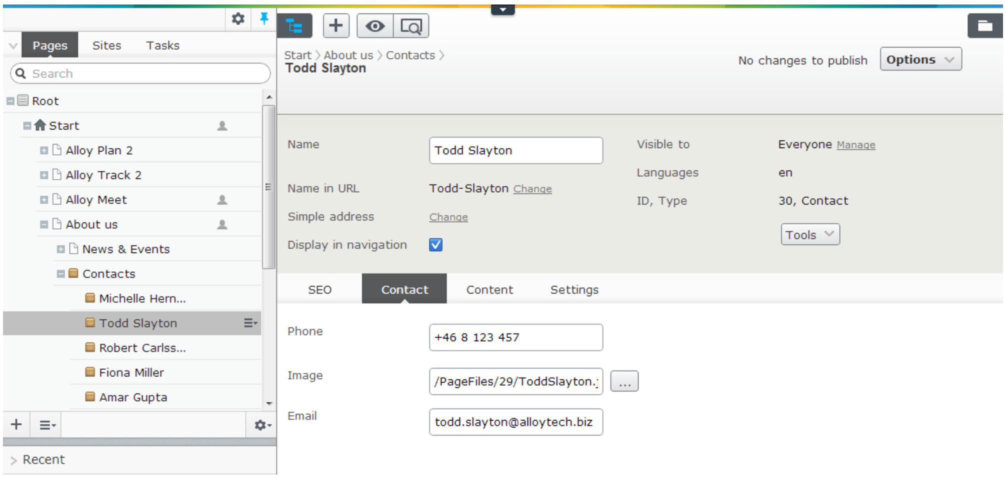
- **Title -** used for the name of the individual for which the contact information is created.
- **Keywords** - contains keywords describing the roles and business fields for the contact.
- **Page description** - used for describing the individual for which the contact page applies.

Contact tab

- **Phone** - the telephone number to be presented with the contact information.
- **Image** - the profile image to be presented on the contact page, select an image from the *file manager*.
- **E-mail** - the e-mail address to be presented with the contact information.

Content tab

- **Teaser image** - an image to be displayed with the contact information.
- **Text** - a text to be displayed with the contact.



Renderings

The Contact page is a container page, meaning that it is only used for containing information. The page type has no display template and cannot be previewed. Therefore, when selecting a contact page in the page tree, the page will open directly in edit mode. The resulting display of a Contact page can most easily be viewed when the page is dropped in the content area of another page.

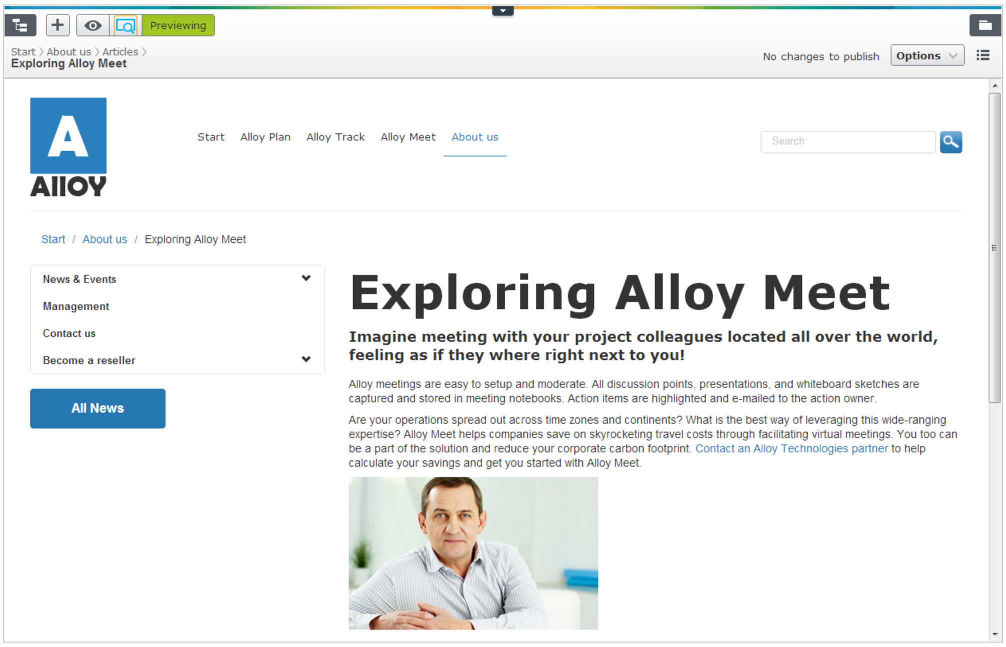
The information from the Contact page is also used when creating a *Contact block*, where you can select the contact from which selected information will be collected and displayed.

Article Page

Introduction

The **Article Page** page type is used for creating articles and news items, and is exactly the same as the *Standard page*. The reason for having a specific article page type is that it can be selected in **page type filtering**, for instance when creating a *page list block* for a news listing. This is useful when you want to specifically include news and article type content, but exclude pages based on other page types.

In order for this to work, it is required that the Article page type is used when creating for instance a page in the "News" page tree node. The page types that should be available for selection in edit mode can be defined in the EPiServer CMS administration interface.



Content Area

The upper left section of the Article page is reserved for the left navigation menu, based on pages in the page tree structure. The page has three content areas, of which the one at the bottom expands over the entire page.

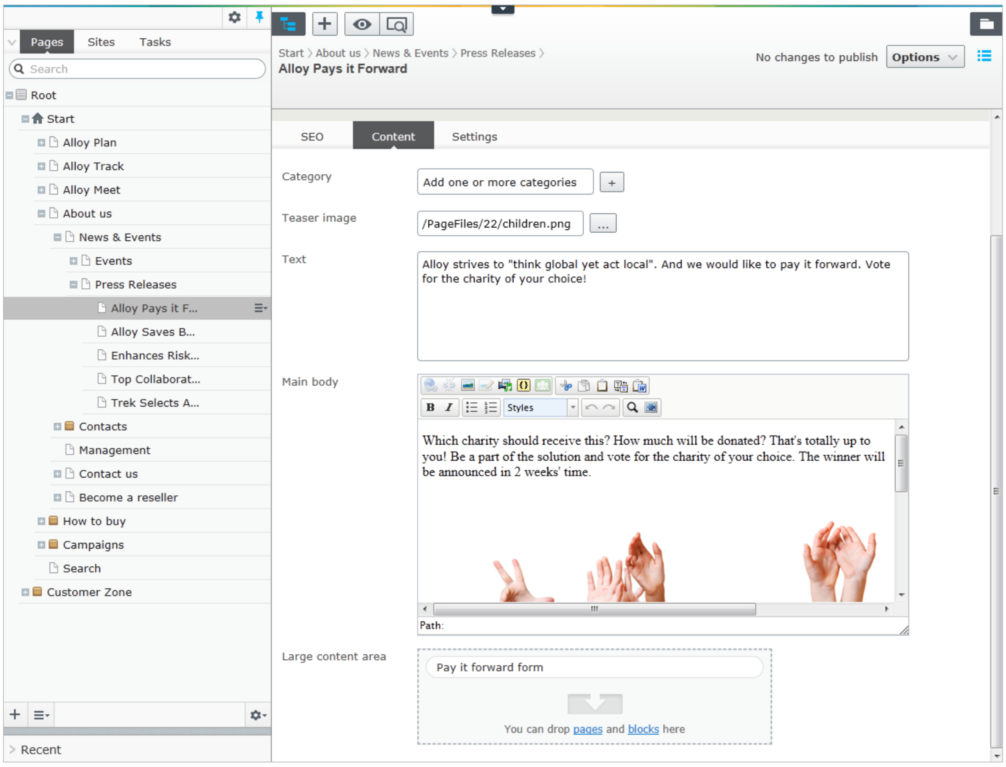
Left Navigation

The navigation displays the parent page as top level and a maximum of three levels of sub-pages, where pages can be hidden using the *Display page in menus* option if desired.

Properties

The following specific properties are available for the Article page in *forms editing* under the **Content** tab:

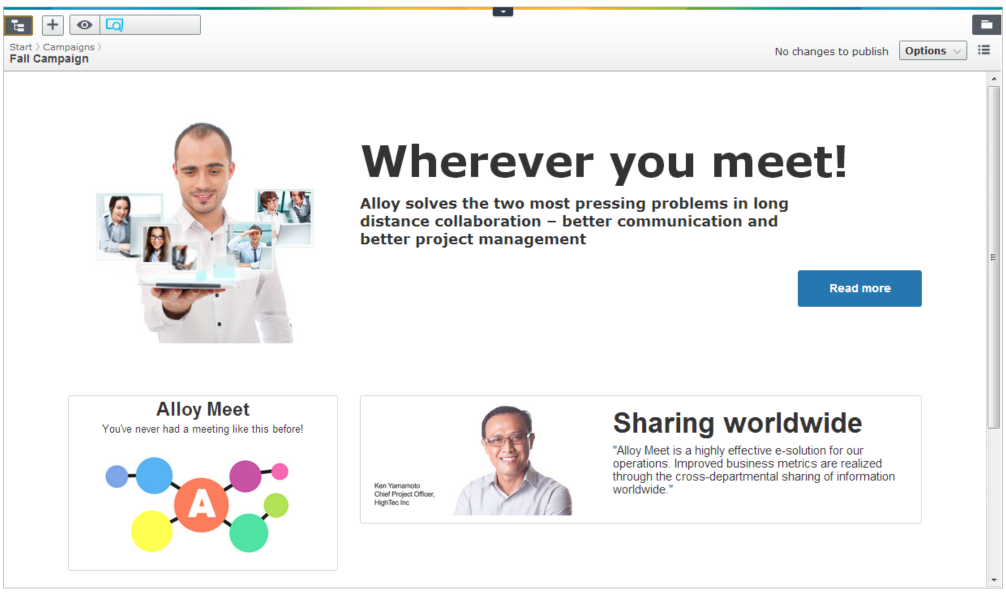
- **Main body** - add information in the text editor with all the functionality of the *EPiServer CMS editor* available.
- **Large content area** - content area where you can add existing content blocks or pages. Blocks added here will be displayed in the **lower middle section** of the page.



Landing Page

Introduction

The **Landing Page** page type makes it possible to create a "stand-alone" page for specific campaign messages and online advertisements, with a layout that is different from the ordinary page layout style. The page does not have the upper main menu or the footer area which exists for all other pages. The page type is used for creating landing pages, which are web pages appearing in response to clicking on a search engine optimized search result, or an online advertisement. The goal of a landing page is to convert website visits into customer contact information and sales leads.



Like other pages, the Landing page can be dropped for display in a content area of another page, to appear as a teaser. By default, pages based on the Landing Page page type will be *hidden in the navigation*.

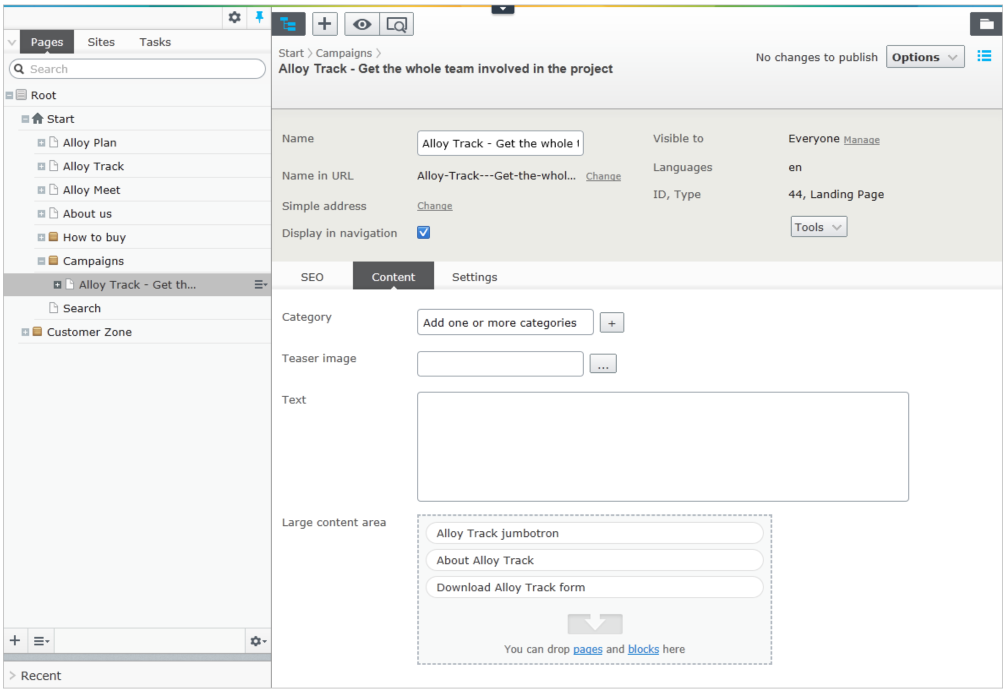
Content Area

The entire page is built up of content areas of various sizes to be used for adding blocks, including the top header and footer part. The available content areas are of the sizes 1/3 and 2/3 width, as well as full width.

Properties

The following specific properties are available for the Landing page in *forms editing* under the **Content** tab:

- **Large Content Area** - content area where you can add existing content blocks or pages.



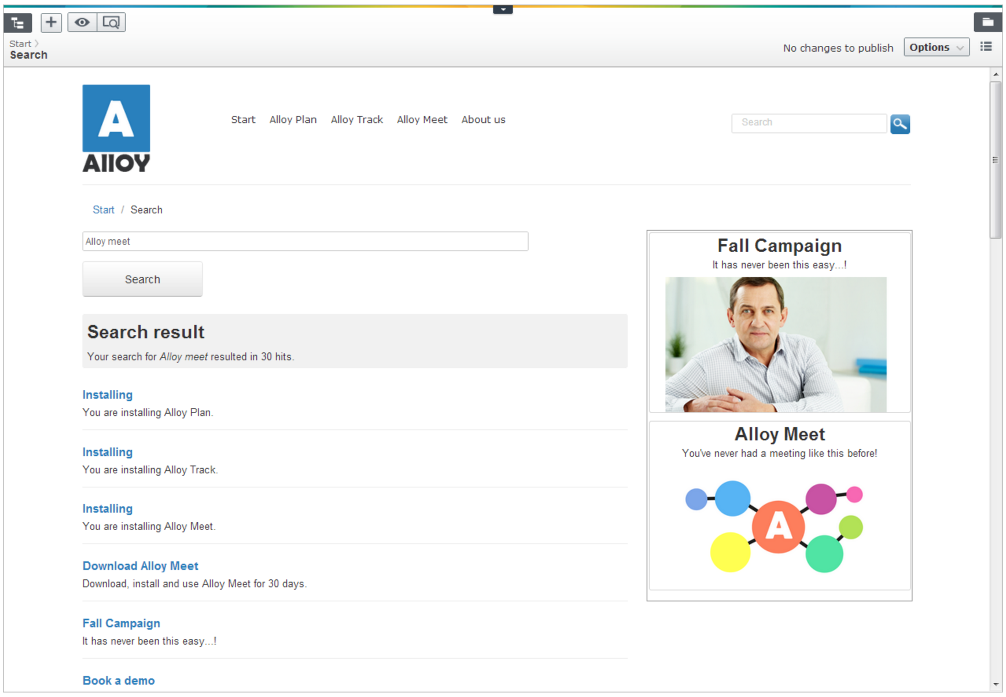
Renderings

If a page based on the Landing Page page type is dropped in a content area, the page name, teaser image and text from the Content information tab will be displayed.

Search Page

Introduction

The **Search Page** page type has built-in functionality where visitors can search the website and browse the displayed list of search results. The search is based on the search engine available in EPiServer CMS. The presentation of the search results is filtered based on the different *page types* and *block types* used when creating content.



Content Area

The entire middle section of the Search page content area is used for the search functionality and the display of search results. The right-hand column is available for dropping content pages and blocks so that you can use the search page for promoting other website content.

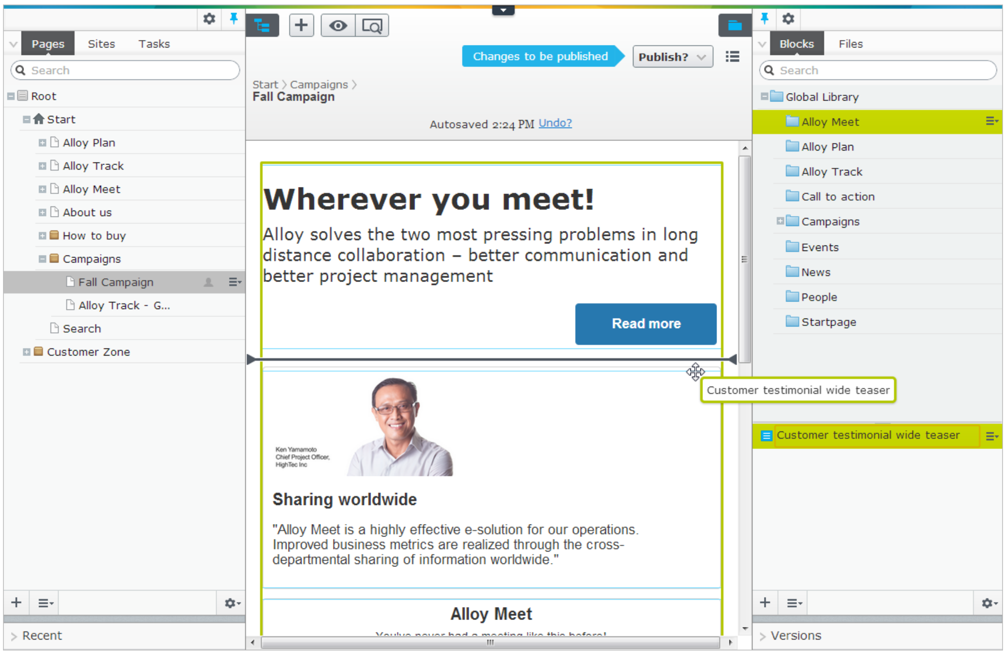
Properties

The Search page has a **Small content area** property where you can add existing content blocks or pages. Blocks added here will be displayed in the **right column** of the page.

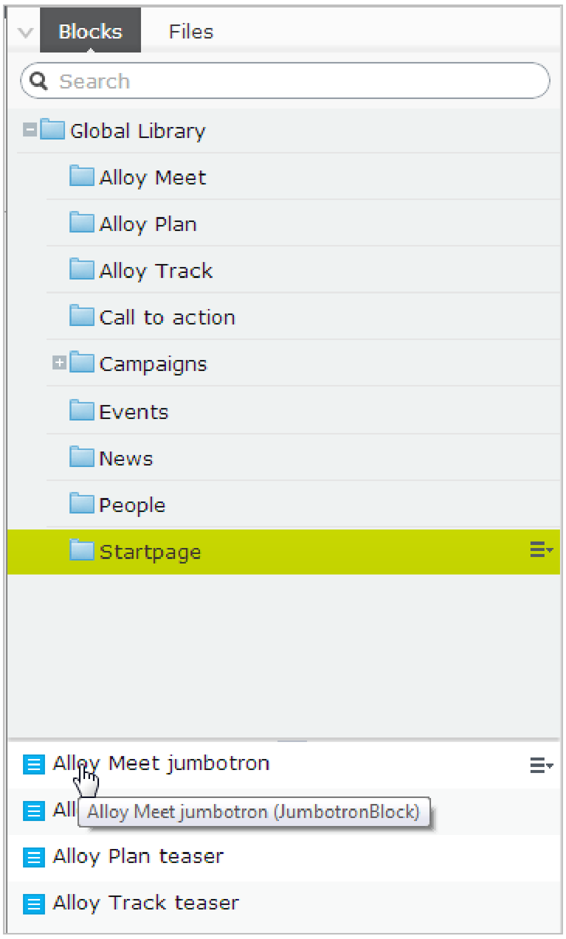
Block Types

Introduction

In EPiServer CMS you can work with **blocks** for sharing of information components across web-sites. A block consists of a collection of properties, for example an image and a piece of text or a set of links. Block types are similar to *page types*. To display the content of a block, it needs to be mapped to a rendering page template.



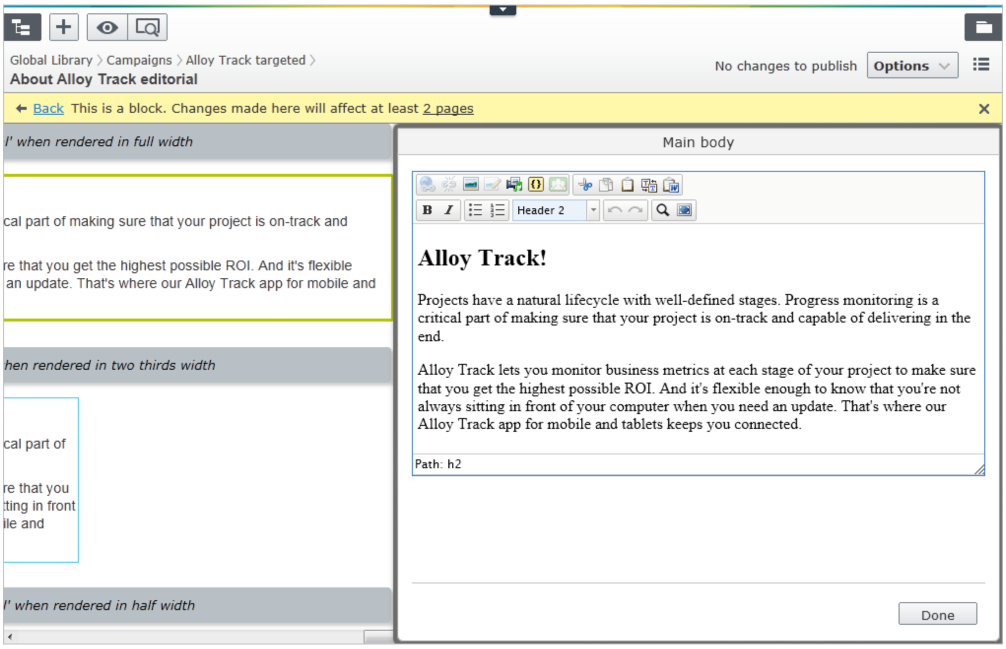
Blocks can be inserted in a content area through drag-and-drop. Blocks can also be edited and rearranged on the page. Furthermore, you can organize blocks on your site in folders and set access rights on blocks. Refer to the section *Using Shared Content on a Page* for more information on how to work with blocks.



Blocks are created in a similar way as pages, meaning that you will have a set of predefined block types to chose between, all with their specific built-in functionality. Just like pages, blocks can be edited through *direct on-page editing* or *forms editing*. However, not all properties will be available for on-page editing.

Content

Just as for *page types*, different block types will have specific properties available under the **Content** tab in Forms Editing. For instance you can have a Main body property providing all the functionality of the *EPiServer CMS editor*. The **Category** property will be available for all block types, to be able to *categorize* the content.

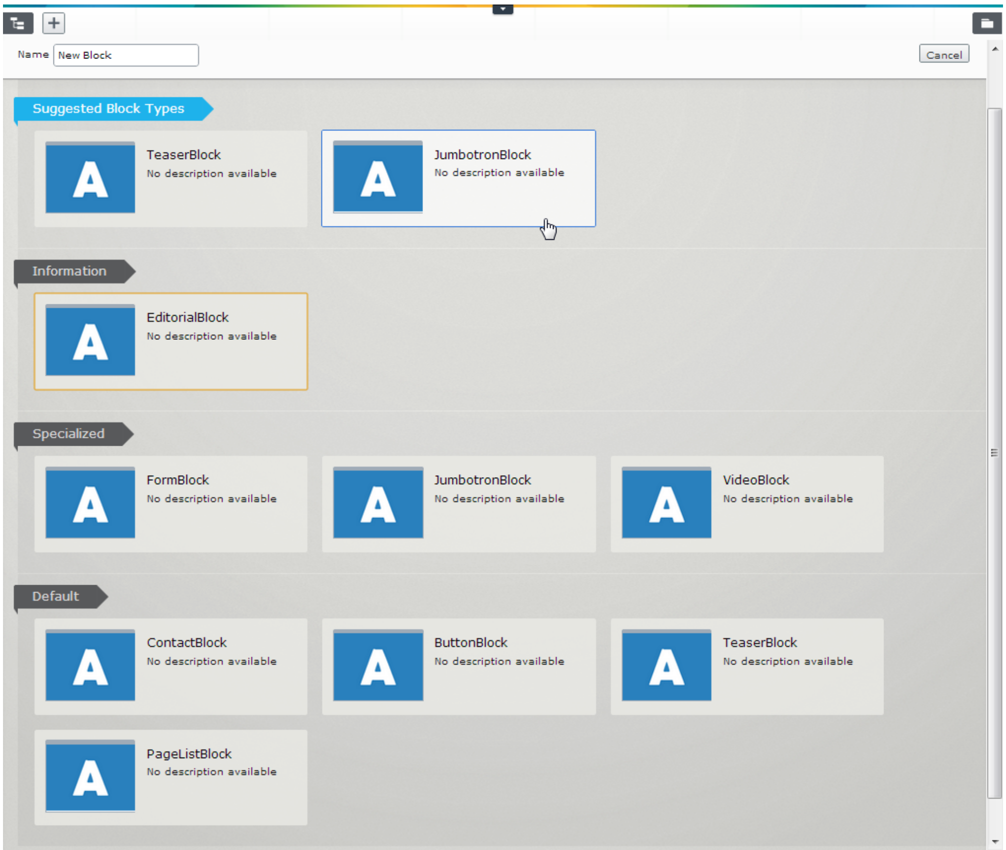


Renderings

As for *page types*, the blocks will have built-in **alternative renderings**, defining exactly how the content should be scaled and adapted for display in for instance a mobile device with limited resolution and display space. Since blocks are used for display in content areas of other pages, blocks do not have a rendering template of their own. However, in some cases you can preview the block appearance when used in different context.

Sample Block Types

The sample site has a set of block types for specific purposes, with built-in functionality that frequently occurs on many websites. Available block types on a site can be categorized to make selection easier for editors. Note that not all block types existing on an EPiServer CMS site may be available for selection in edit mode. The availability of block types in edit mode can be controlled from the EPiServer CMS administration interface.

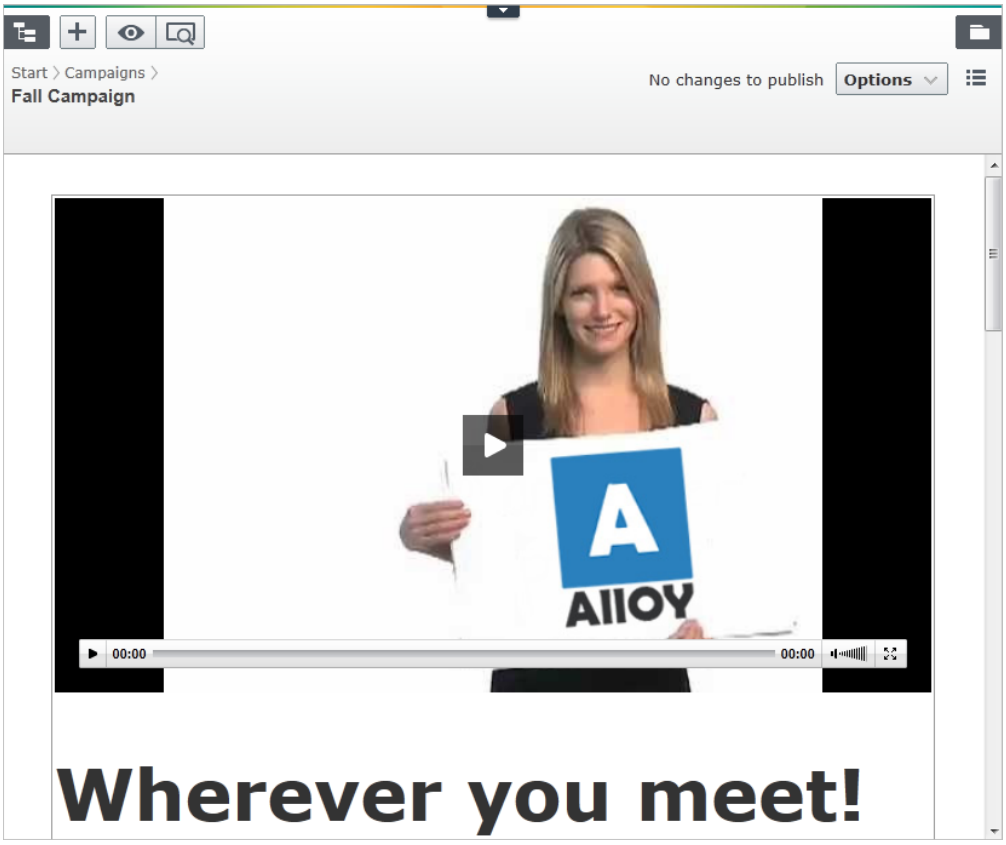


In the following sections of this documentation we will describe the features and specific properties of the block types included with the sample site. Use these sample blocks as inspiration when creating your own blocks.

Video Block

Introduction

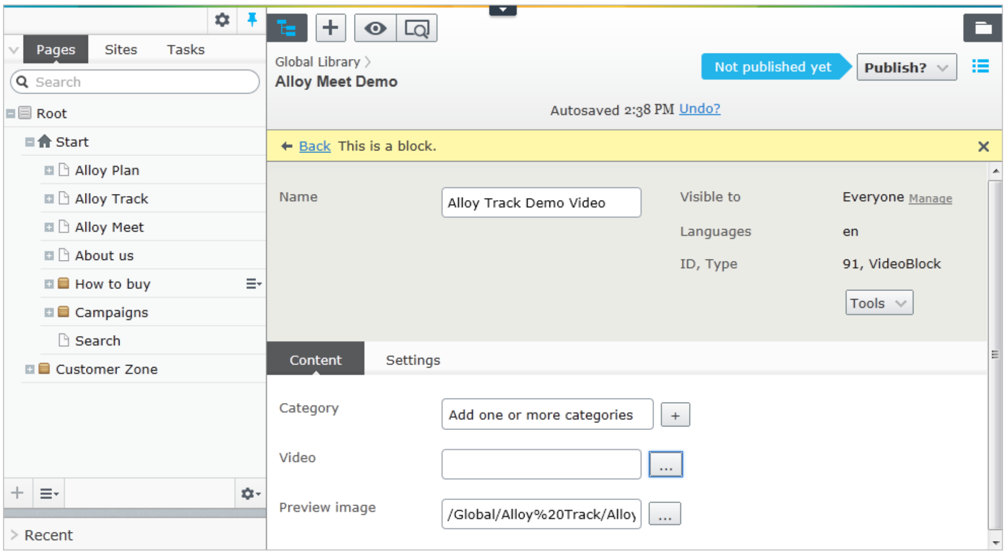
The **Video Block** block type is used for creating a media block with links to animated media such as a YouTube movie or a video file from the *file manager* in EPiServer CMS. The block contains links to a video and a preview image, which is displayed in the block.



Properties

The following specific properties are available for the Video block in *forms editing* under the **Content** tab:

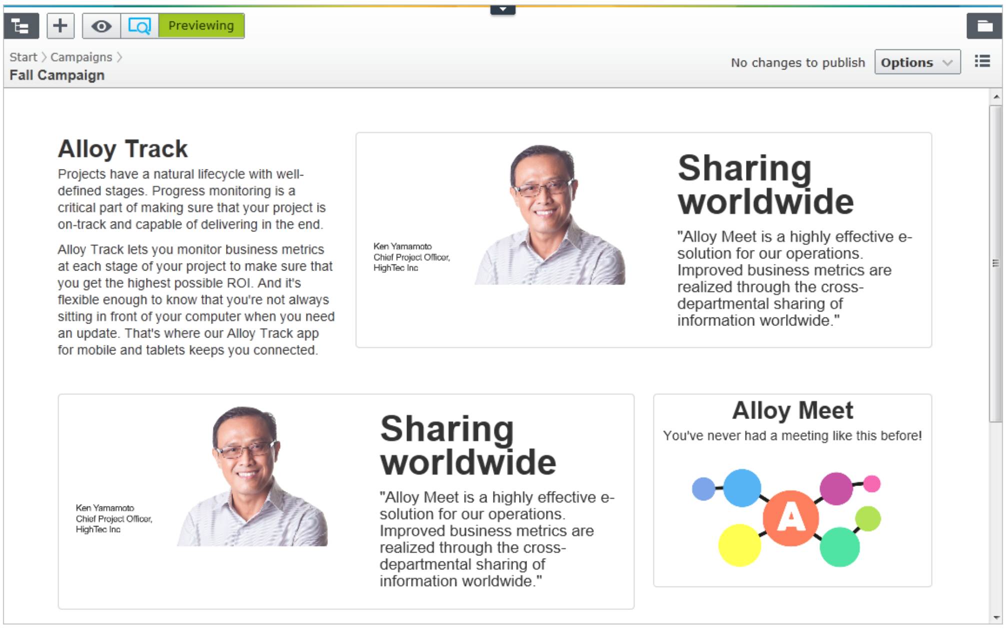
- **Video** - add the link to the video to be displayed, select a video from the *file manager*.
- **Preview image** - the preview image for the video, select an image from the *file manager*.



Editorial Block

Introduction

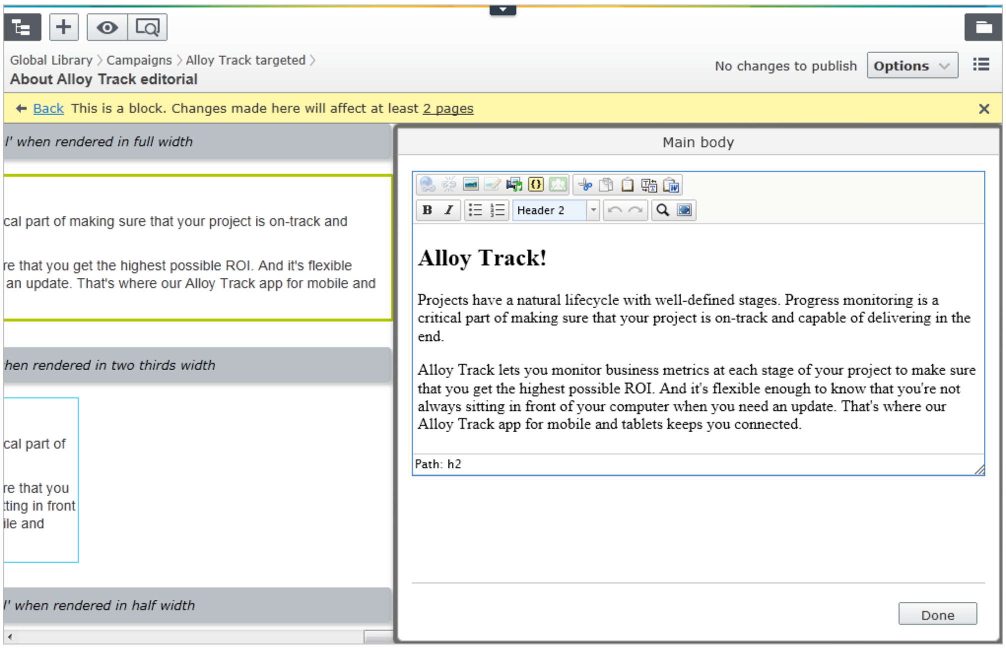
The **Editorial Block** block type is used for creating a block where you can add content using the EPiServer CMS editor. You can either use the full functionality of the editor adding *images*, *links*, *dynamic content* or *personalized content*. Or you can just add a simple text to be combined with other block types when displayed.



Properties

The following specific properties are available for the Editorial block in *forms editing* under the **Content** tab (or through *direct on-page editing*):

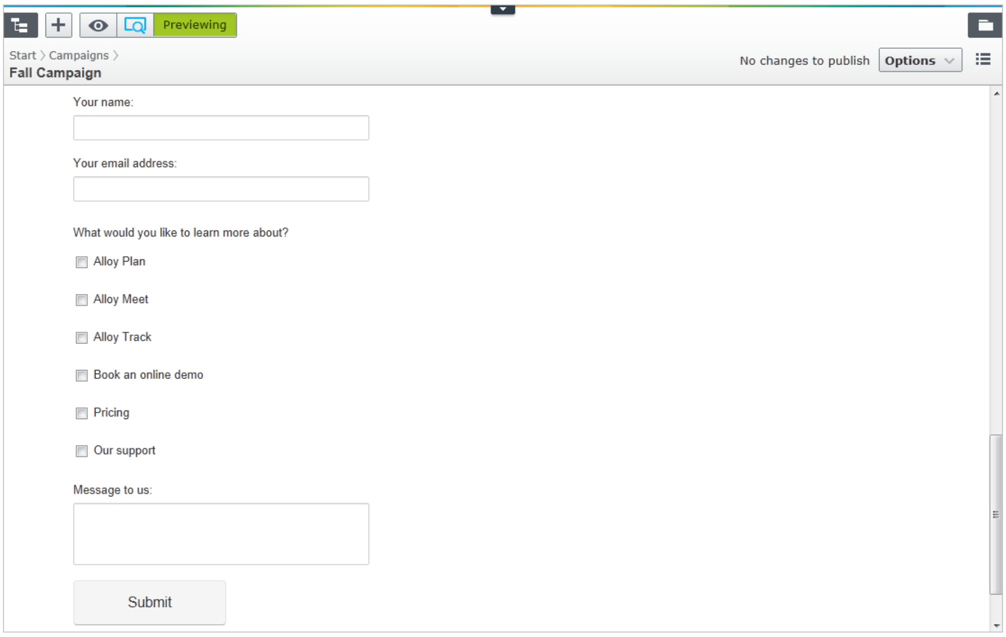
- **Main body** - add information in the text editor with all the functionality of the *EPiServer CMS editor* available.



Forms Block

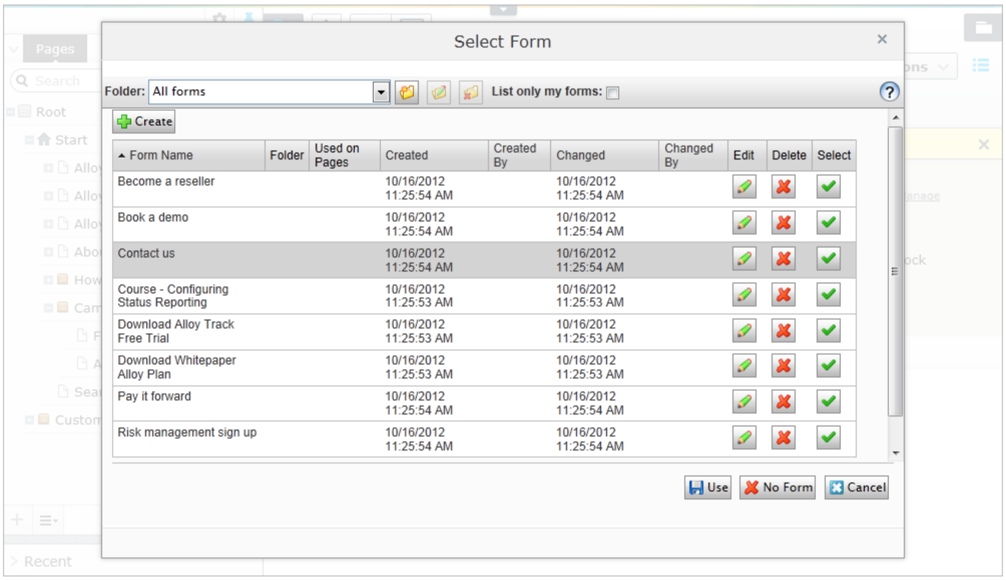
Introduction

The **Forms Block** block type is used for creating and defining web forms, a popular and frequently used feature on websites. In the sample templates, the forms functionality is made available through a block, which means that the entire setup for a specific form can easily be reused on different web pages.



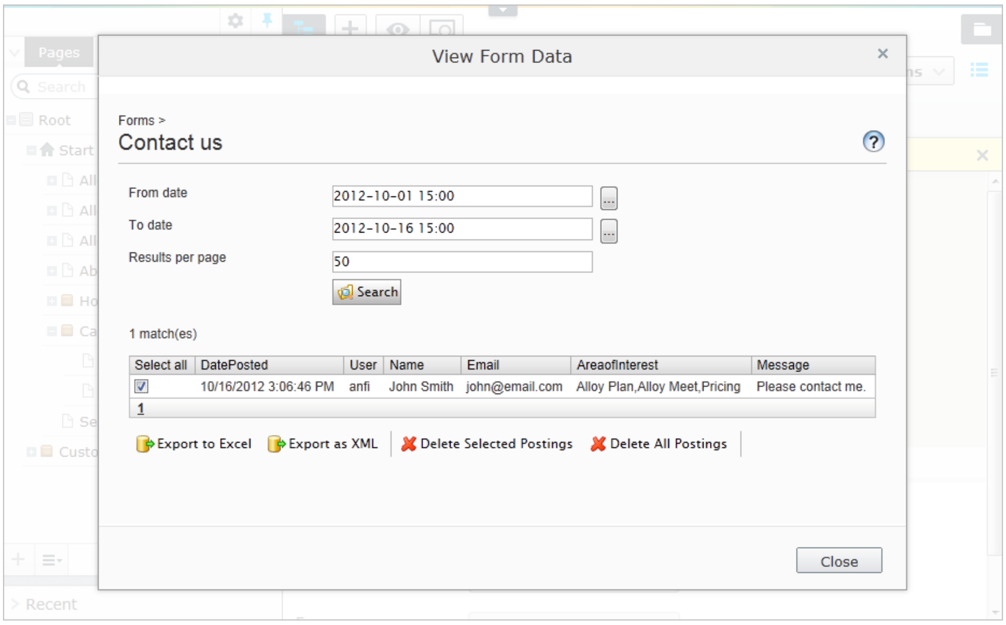
Properties

Under the **Content** tab in *forms editing*, you will find the **Form** property, which provides access to the full web forms editing features of EPiServer CMS. Here you can use existing forms, or create new forms, to be used in the Forms block. For more information on how to work with forms, refer to *Using Forms* in this documentation.



Viewing and Exporting Form Data

To access and export data for a form, you open the **Forms** block for editing in Forms Editing, and select the **View Data** option. Note that the data displayed for a form will be collected from all pages where this specific forms block has been used.

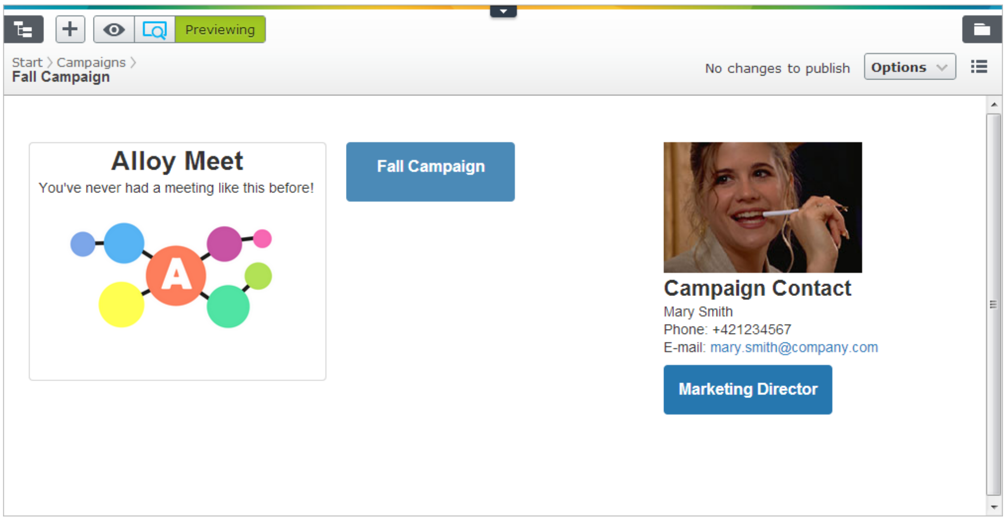


Contact Block

Introduction

The **Contact Block** block type is used for adding customized contact information to other pages on the website. With this block you can add an image, a message line and an action button. For instance, you can create a contact block with the message "Campaign Contact", and link to the

Contact page for contact "Mary Smith", from where the contact information will be collected for the display.

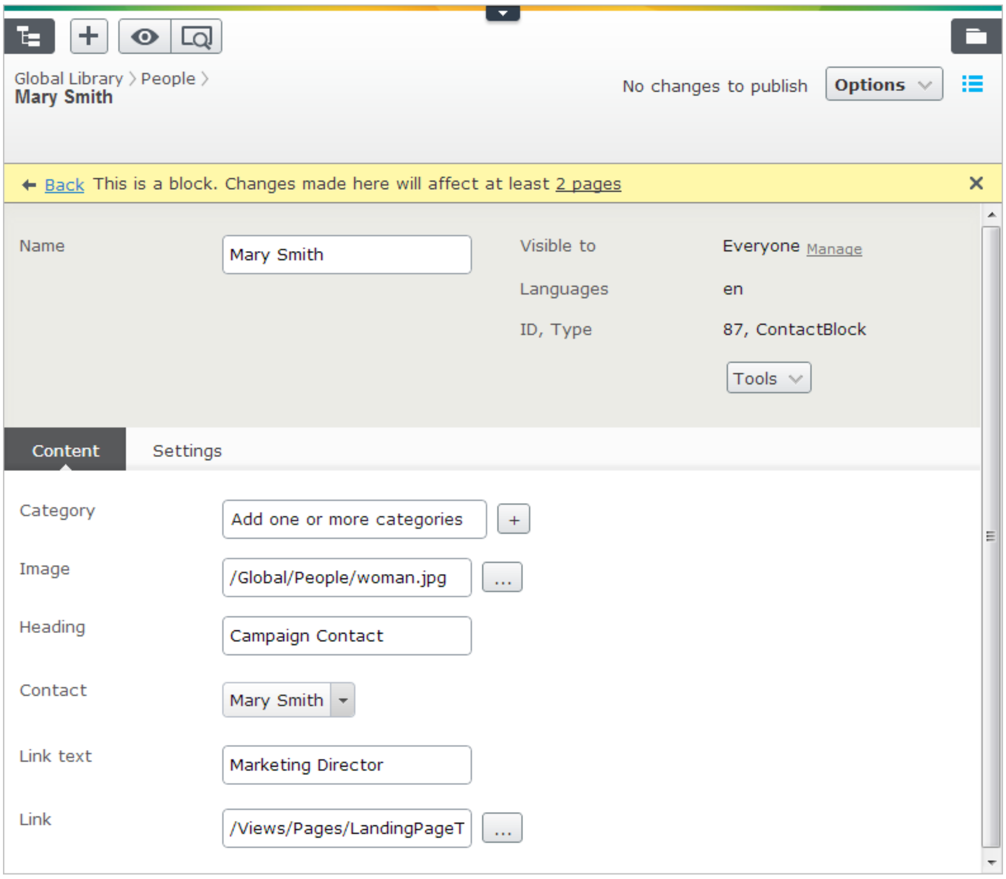


Compare with the *Contact* page, which will just present the stored contact information when used in a content area of another page.

Properties

The following specific properties are available for the Contact block in *forms editing* under the **Content** tab:

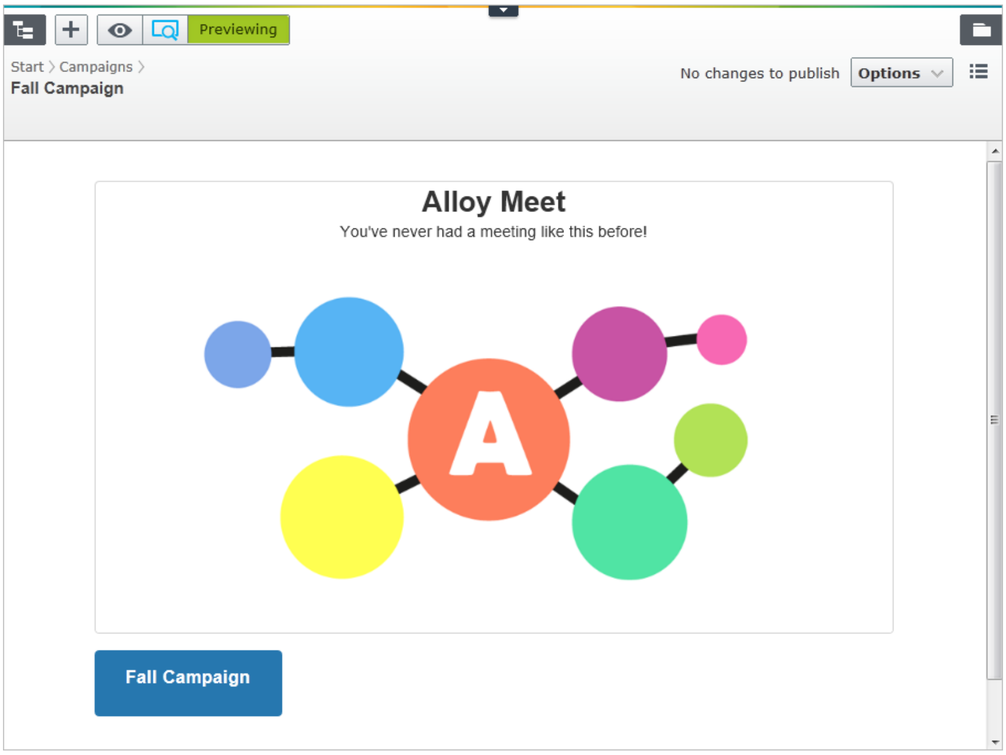
- **Image** - add an image from the *file manager*.
- **Heading** - add a heading for the contact block.
- **Contact** - add a *link* to the *contact page* from where to collect contact information, select a contact from the drop-down list.
- **Link text** - add a text for the action button.
- **Link** - add a target *link* for the action button.



Button Block

Introduction

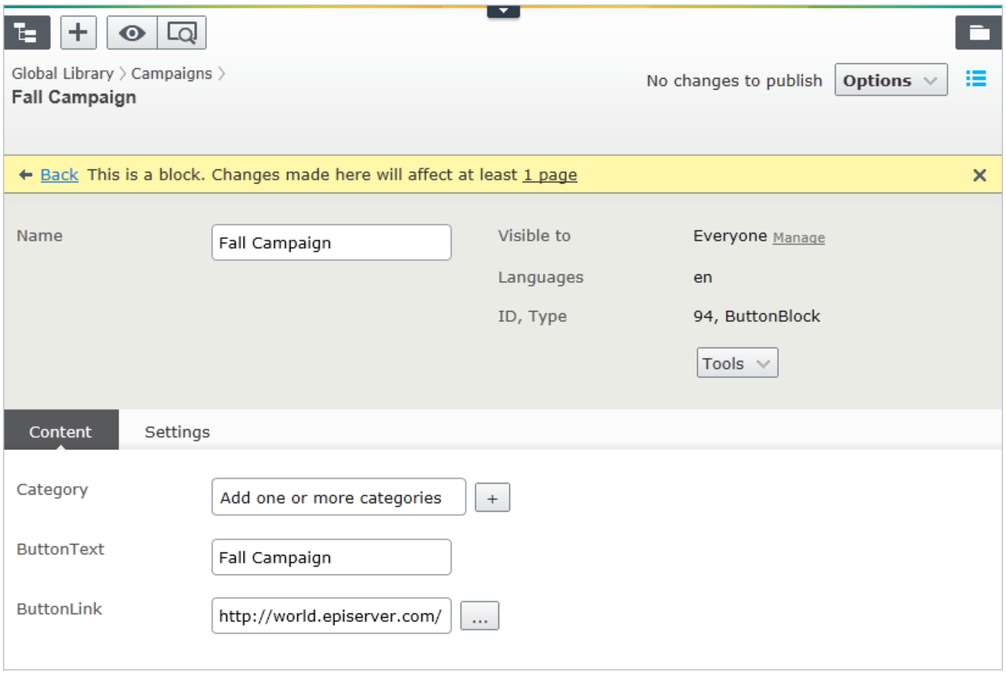
The **Button Block** block type is used for creating a "button" providing a clear entrance or action point for website visitors. The button will have a preset formatting and size, following the style of the website. Editors can define a target link for the desired button action landing page.



Properties

The following specific properties are available for the Button block in *forms editing* under the **Content** tab:

- **Button text** - add the text to be displayed on the button. As the button will have a fixed display size, the number of characters is limited to 15.
- **Button link** - add the target *link* to the button.



Renderings

The Button block itself will always have a fixed size, regardless of the context in which it is displayed.

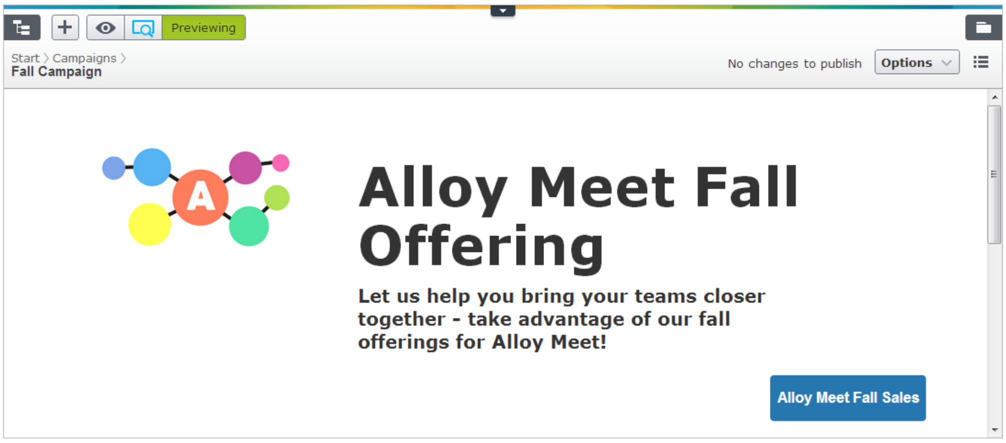
Jumbotron Block

Introduction

The **Jumbotron Block** block type is used for creating a large banner combining the following properties where editors can define the content and a link:

- A preformatted **heading**
- A preformatted **sub-heading**
- A preformatted action **button** with configurable text and target link
- An **image** with an image description

This can be used for many purposes, for instance in campaign messages or as an "eye-catcher" on a start page.

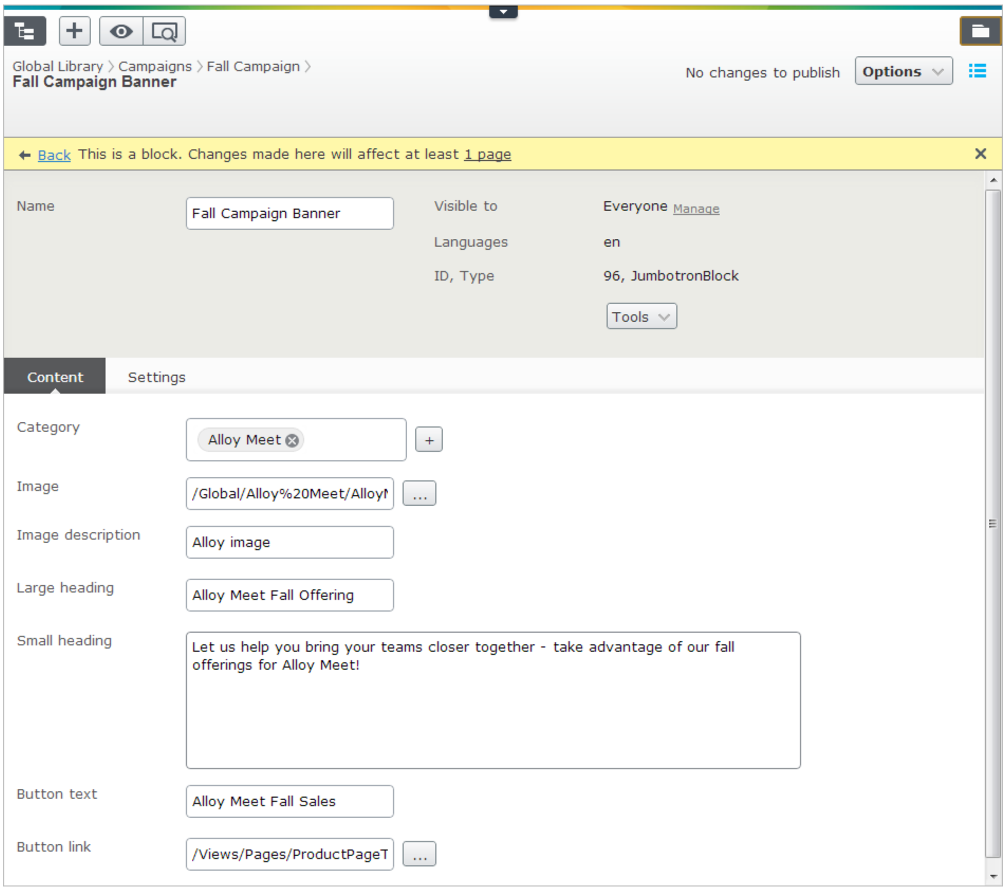


Using this block you can quickly create campaigns and banner messages across the website, displaying a text, an image and an action button.

Properties

The following specific properties are available for the Jumbotron block in *forms editing* under the **Content** tab:

- **Image** - add the block image, select from the *file manager.*
- **Image description** - add the image description for the block image.
- **Large heading** - add the main heading that will be displayed for the block.
- **Small heading** - ad the sub-heading for the block.
- **Button text** - add the text to be displayed on the action button.
- **Button link** - add the target *link* for the action button.



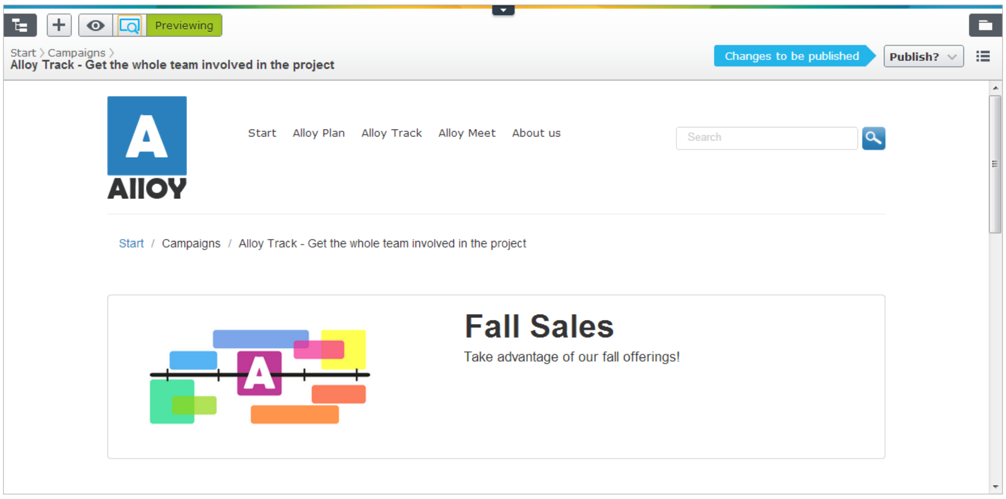
Renderings

The Jumbotron block is always rendered in full width display.

Teaser Block

Introduction

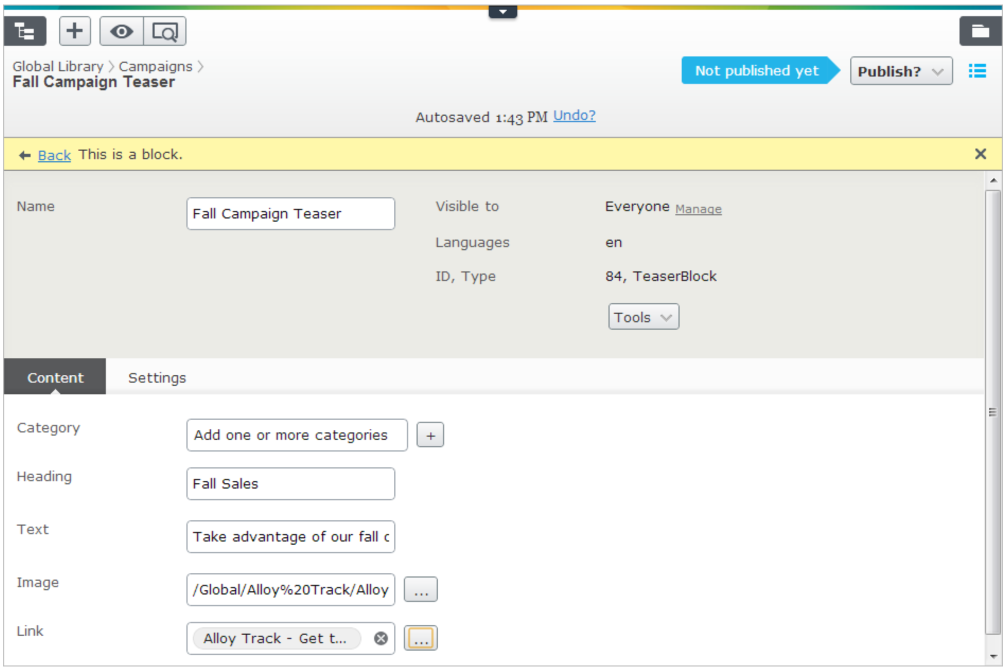
The **Teaser Block** block type is used on the site to highlight sub-pages and sections and to promote various events and offerings. The block can contain just plain text, an image or both, as well as a link. If a link is added, the entire teaser block will become a link to the selected target page.



Properties

The following specific properties are available for the Teaser block in *forms editing* under the **Default** tab:

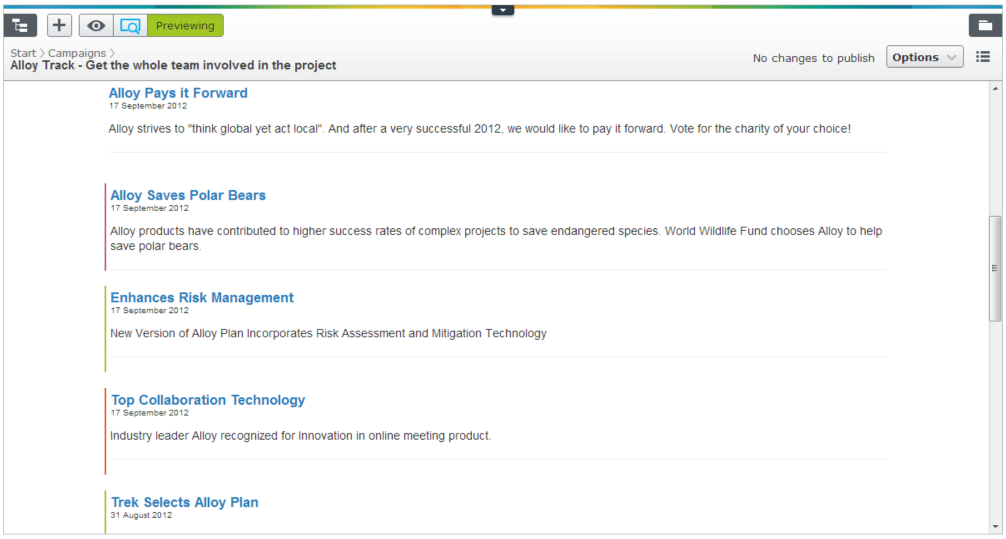
- **Heading** - add a heading for the teaser block.
- **Text** - add a text message for the block.
- **Image** - add an image, select from the *file manager*.
- **Link** - add a *link* to the desired target page.



Page List Block

Introduction

The **Page List Block** block type is used for creating various types of page lists, a common feature on websites. When used in a block, this allows you to reuse and display listings and their content in different context, for instance a news list displaying the latest product news. Since the list is updated in one place, changes are instantly reflected.

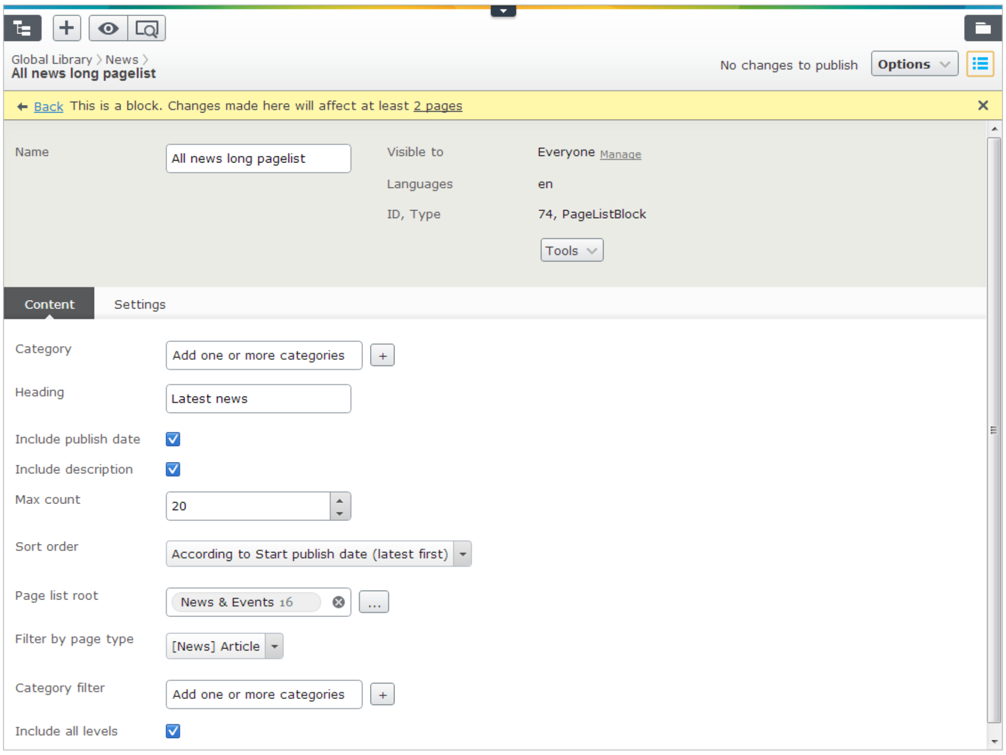


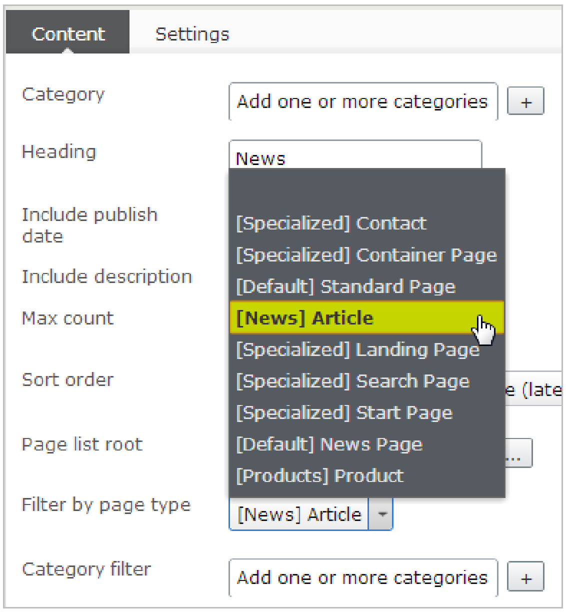
The page listing can be **filtered** based on dates and page types, for instance product pages to create a product listing. A color coding is applied to the page listing, showing if a page in the listing is related to a specific product.

Properties

The following specific properties are available for the Page List block in *forms editing* under the **Content** tab:

- **Heading** - the heading for the list, preformatted.
- **Include publish date** - displays the page publish date in the list, if selected.
- **Include description** - displays a page introduction text in the list, if selected. Depending on the page type, the text will be taken from for instance the *meta data information* or the first part of the main body information.
- **Max count** - set the number of pages to include in the listing.
- **Sort order** - select a sort order for the listing, for instance "Alphabetical". Refer to *Sorting Page Order in Menus* for more information on sort order.
- **Page list root** - here you define the root page from where the sub-pages will be collected.
- **Filter by page type** - set a filtering for the page list based on **page type**, for instance "Product Page". The filtering will then only include pages based on this page type.
- **Category filter** - select categories for the page listing, only pages with these categories will be included in the listing. The built-in color coding will be applied to categorized items in the list.
- **Include all levels** - includes sub-pages in the list if selected.





The page listing can be filtered on both **page type** and **category**. If no page type or category is selected for the filtering, all page types and categories will be displayed.