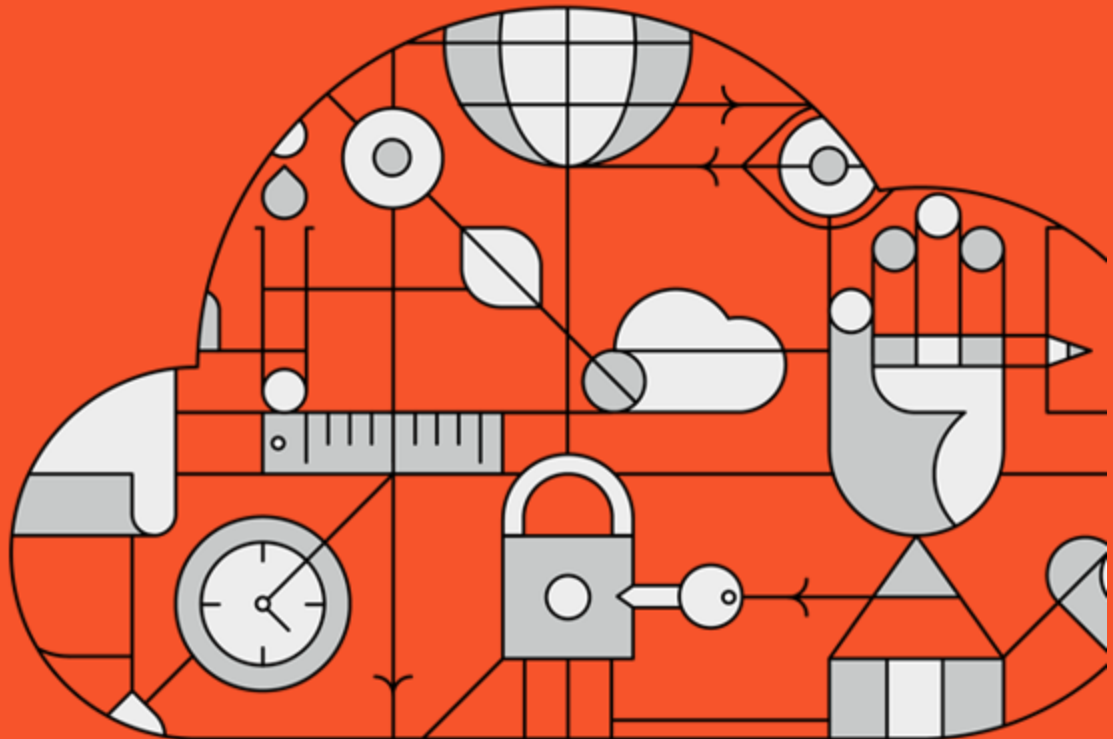




Episerver CMS

Administrator User Guide





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EpiServer CMS Administrator User Guide 17-6

Release date 2017-12-04

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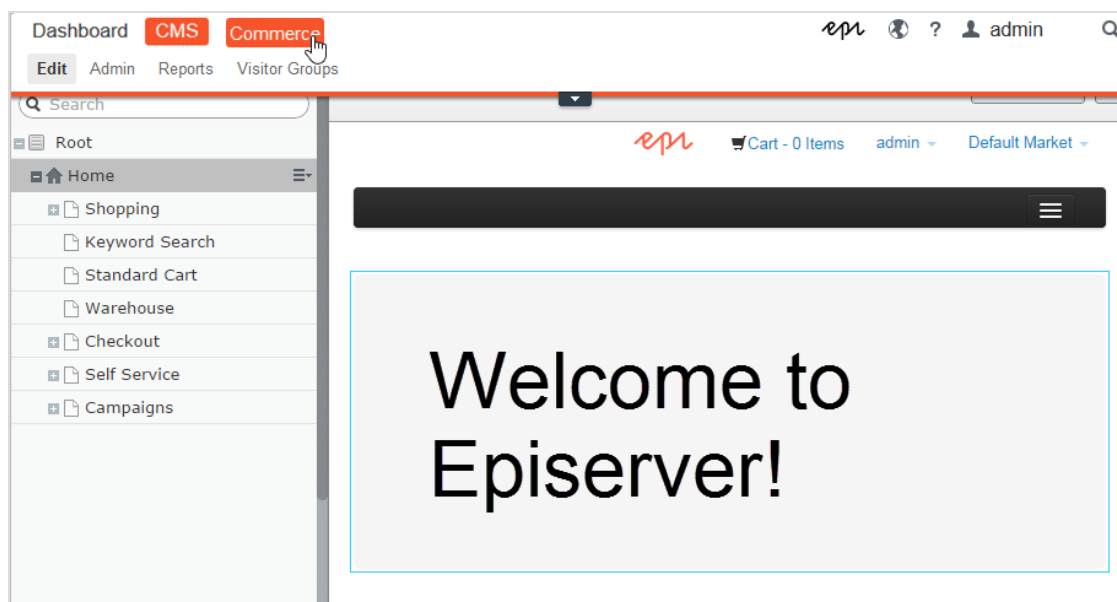
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Introduction

Online help describes the features and functionality of the Episerver platform, and covers CMS for content management, Commerce for e-commerce functionality, Find for extended search, and Episerver add-ons. You access it from within the Episerver platform or from [Episerver World](#). The online help is also available in PDF format for users who prefer PDF or want to print the documentation.

This PDF describes the features and functionality of Episerver CMS which you can find on [Episerver World](#). Developer guides and technical documentation also are found on [Episerver World](#).

The user documentation is intended for editors, administrators, marketers and merchandisers, working with tasks as described in Roles and tasks.



Features, licenses and releases

The user documentation is continuously updated and covers the latest releases for the Episerver platform.

CMS

Episerver CMS is the core part of the Episerver platform providing advanced content creation and publishing features for all types of website content. CMS features are available in all Episerver installations.

Commerce

Episerver Commerce adds complete e-commerce capabilities to the core functionality in CMS. Commerce requires additional license activation.

Add-ons

Add-ons extend the Episerver capabilities with features like advanced search, multi-variate testing, and social media integration. Some add-ons are free, others

require license activation. Add-ons by Episerver are described in the online help.



Due to frequent feature releases, this user guide may describe functionality that is not yet available on your website. See [What's new](#) to find out in which area and release a specific feature became available.

Copyright notice

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What's new?

The Episerver user guide describes features in the Episerver platform, including CMS for content management and Commerce for e-commerce management, and add-ons from Episerver. New features are continuously made available through [Episerver updates](#).

This user guide (17-6) describes **features added up until and including update 191** for Episerver; see [Episerver World for previous user guide versions](#).

Area	Features and updates
<div data-bbox="229 659 405 705">CMS</div>	<ul style="list-style-type: none"> » You can now select a view (for example, on-page edit or all properties view) and the selection stays when opening another content item. Previously, the default view was always displayed when you opened a content item. (update 178) » A demo video on the basic features in Content approvals has been published: <div data-bbox="651 898 1251 1234"> </div>

Getting started

This section describes how to log in to an Episerver website, access features and navigate the different views. The login procedure may be different from what is described here, depending on how your website and infrastructure are set up. The examples described here are based on a “standard” installation of Episerver with sample templates.

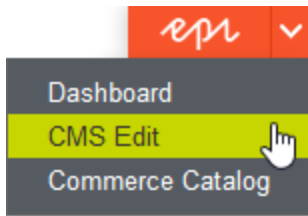
Logging in

As an editor or administrator, you usually log in to your website using a specified URL, a login button or link. Enter your user name and password in the Episerver login dialog, and click **Log In**.

Accessing features

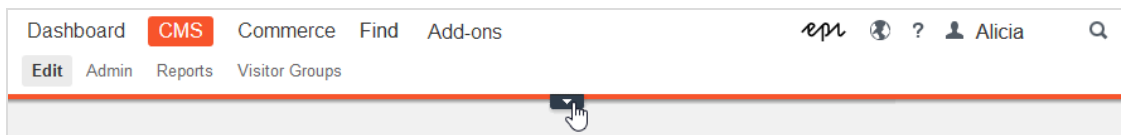
What you are allowed to do after logging in depends on your implementation and your access rights, since these control the options you see. When logged in, the Episerver quick access menu appears in the upper right corner.

Selecting **CMS Edit** takes you to the edit view and other parts of the system. You can go directly to your personal dashboard by selecting the **Dashboard** option.



Navigation

Pull down the **global menu**, available at the very top, to navigate around. The menu displays the different products and systems integrated with your website. Select **CMS** (for example) to display available options in the submenu.



Your menu options vary depending on your access rights. These user guide examples assume that the user has full permissions to all functions in Episerver.

Next steps

- » User interface and Roles and tasks in the CMS Editor User Guide for the Episerver user interface and roles.
- » Managing content in the CMS Editor User Guide to create and publish content.
- » Administration interface in the CMS Administrator User Guide to administer and configure settings in Episerver.
- » Commerce User Guide to work with e-commerce tasks, if you have Episerver Commerce installed.
- » Find User Guide to work with search optimization, if you have Episerver Find installed.

Roles and tasks

Episerver is designed for interaction with website visitors, and collaboration between users. A user in Episerver is someone working with different parts of the platform. A user can belong to one or more user groups and roles, depending on their tasks and the size and setup of the organization. Typical roles and related tasks are described below. See [Setting access rights in the CMS Administrator User Guide](#) to configure user groups and roles in Episerver.

Visitor

A visitor is someone who visits the website to find information or to use available services, on an e-commerce website possibly with purchasing intentions. Purchasing on an e-commerce website can be done "anonymously" (payment and shipping details provided), or by registering an account. Visitors may also contribute to website content as community members, which usually requires registration of an account profile.

Community member

Content may be added by visitors or community members, if social features and community functionality are available for the website. This content includes forum and blog postings, reviews, ratings and comments, in which case there might be a need for monitoring this type of content on the website. Monitoring can be done by an editor, or a specific moderator role for large websites and online communities.

Content editor

A content editor is someone with access to the editorial interface who creates and publishes content on the website. Content editors with good knowledge of the website content work with search optimization for selected content in search results. Editors may also want to follow-up on content with unusually high or low conversion rate to update or delete this content.

Marketer

A marketer creates content and campaigns with targeted banner advertisements to ensure customers have consistent on site experience of the various marketing channels. Furthermore, the marketer monitors campaign KPI to optimize page conversion. A marketer with good knowledge of the website content may also want to monitor search statistics to optimize search for campaigns and promote content.

Merchandiser

A merchandiser typically works with stock on an e-commerce website to ensure that the strongest products are put in focus. This role also creates landing pages, sets product pricing, coordinates cross-product selling, oversees delivery and distribution of stock, and deals with suppliers. This user wants to identify search queries with unusually high or low conversion rates, to adjust the search or the product line.

Website owner

A website owner is someone with overall responsibility for the content and performance of one or more websites. This user monitors website activities such as page conversions, customer reviews or sales progress. Rarely creates content but can be involved in the approval of content created by others. A website owner may have administrative access rights and may install selected add-ons on the website.

Administrator

An administrator works with configuration of various system settings from the administration user interface, including search, languages, user access rights and visitor groups for personalized content. Administrators may also install add-ons on the website. Administrators usually have extended access rights compared to other user groups, and can access all parts of the Episerver platform.

Developer

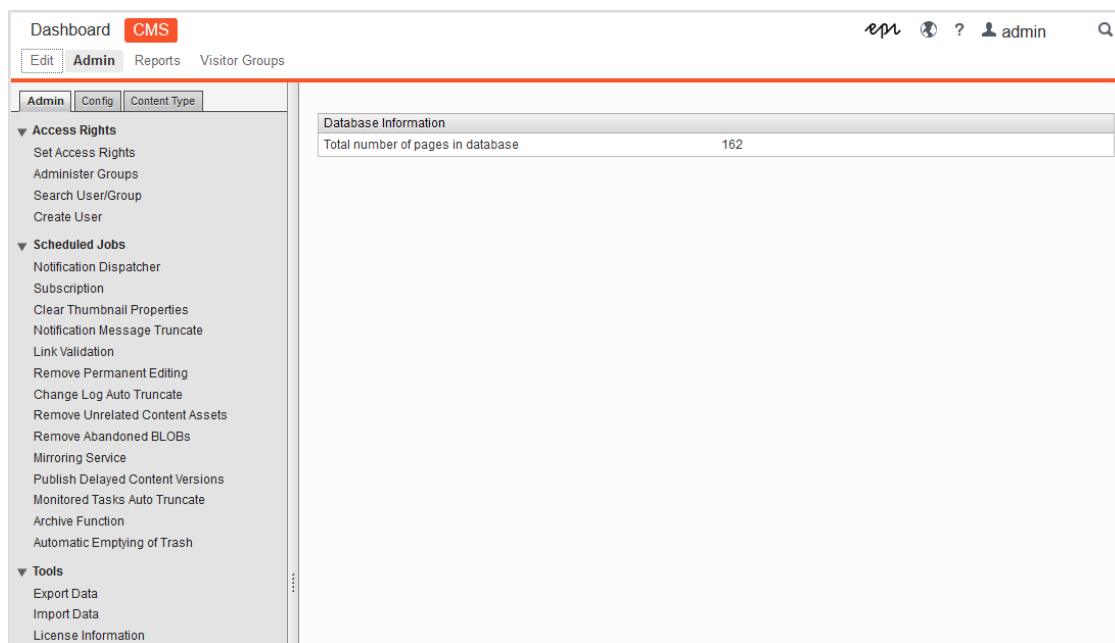
A developer is someone with programming skills working with the setup and implementation of the website, and maintenance and development of new functionality. Creates the content templates for pages, blocks and catalog content used by editors in CMS and Commerce, configures e-commerce settings, and manages the index and customized search features in Find. Developers may also install add-ons on the website.

CMS

Administration interface

Depending on which parts of the Episerver platform are implemented, you have various administration options in the user interface. The options in this topic apply to a standard installation of Episerver and related products; a customized site might have additional administration options.

Administration view



The **admin view** in CMS contains core administration features for the Episerver platform where you manage [access rights](#), website [languages](#), and [scheduled jobs](#). You also manage the [export and import](#) of data between websites, and [configure new websites](#) in a multi-site solution.

Visitor groups

[Visitor groups](#) are used by the personalization feature, and are managed from the **Visitor Groups** option in the global menu. You need administration access rights to manage visitor groups.

Add-ons



It is recommended to install add-ons via Visual Studio and NuGet packages. For more information, see [Episerver World](#).

The add-on system keeps track of system dependencies and lists installed and available add-ons and updates. You can also manually upload unlisted add-ons to the website.

The following views are available:

- » **Installed** lists installed add-ons. When an update is available a notification appears. Click the header columns to sort the list of available add-ons.
- » **Episerver Add-ons, Episerver Beta and Third-Party Add-ons** list available add-ons from Episerver or third-party providers.
- » **Updates** lists available upgrades for your website, based on products and system versions installed in your environment.

Dashboard CMS **Add-ons** epi ? admin

Manual Upload Restart your site after you have installed or uninstalled add-ons. [Learn More](#)

Installed
Episerver Add-ons
 Episerver Beta
 Third-Party Add-ons
 Updates

EpiServer Add-ons

Welcome to the Episerver Add-on Store. Episerver Add-ons are developed and tested by Episerver. The standard [Episerver End-User License Agreement \(EULA\)](#) and other [general licensing terms](#) apply.

By downloading and installing Episerver Add-ons, you accept the aforementioned terms and conditions, and agree to abide by all relevant Episerver licensing agreements, terms and conditions.

Please [contact us](#) or your partner if you have any questions.

EpiServer GoogleAnalytics
1.3.0.75

Enables editors add tracking script and view analytics data in Episerver. Refer to the user guide at <http://webhelp.episerver.com>

[More information](#)

Dependencies: Episerver Shell UI, Episerver.Cms.Shell.UI, Episerver, Episerver Framework, DotNetOpenAuth (unified), Google.Apis, Google.Apis.Analytics.v3

Tags: Episerver, GoogleAnalytics

[Install](#)

EpiServer Publish from Office
1.0.3.75

Allows editors to publish MS Word content as pages in Episerver CMS. Refer to the user guide at <http://webhelp.episerver.com>

[More information](#)

Dependencies: Episerver, Episerver Framework

Tags: Episerver, PublishFromOffice

[Install](#)

EpiServer Self-Optimizing Block
2.0.1.75

Used for multivariate testing of blocks in Episerver CMS

[More information](#)

Dependencies: Episerver, Episerver Framework, Episerver.Cms.Shell.UI, Episerver Shell UI, Episerver Packaging

EpiServer Social Reach
1.5.0.75

Enables editors to send updates on social channels using a unified workspace. Refer to the user guide at <http://webhelp.episerver.com>

[More information](#)

Dependencies: Episerver, Episerver

More on administration

Commerce

Administration in Episerver Commerce

If you have Episerver Commerce installed on your website, Commerce has an administrative interface for managing e-commerce-specific settings. See the Administration section in the user guide for

Episerver Commerce.

Find

Administration in Episerver Find

If you have added Episerver Find to your website, there are some specific administration and configuration options available to optimize the search functionality. See the Administration and configuration section in the user guide for Episerver Find.

CMS

Access rights

By using access rights in Episerver, you can control the content that a website visitor sees, and what editors can do and where they can do it in the content structure. For example, you may give members of the Marketing department access to edit the website marketing material that other company users should not edit. You can set access rights for different types of content, such as pages, blocks, images and documents in the navigation and assets panes.

You can also use access rights together with visitor groups and give a visitor group from a local 10-mile radius access to an advertisement page.

Access rights are normally managed from the administration view in Episerver CMS, but you can give editors the right to manage access rights for a single page in edit view.



You can watch the following demonstration video, [Managing access rights](#). (6:39 minutes)

Different types of access

You can grant or deny the following types of access to users and groups: Read, Create, Change, Delete, Publish, and Administer.

Access right	Description
Read	The user or group can access the content as a reader; otherwise the content is invisible.
Create	The user or group can create content under the content item on which this right is set.
Change	The user or group can access the content to modify it. Typically, Create and Change are set together but there may be cases where you want someone to modify created content (but not create their own content), or vice versa.
Delete	The user or group can delete the content.
Publish	The user or group can publish the content.
Administer	<p>The user or group can set access rights and language properties on individual content items from edit view for content given this access.</p> <p>Note: This does not provide access to admin view (for this you need to be a member of the WebAdmins group, see Built-in user groups).</p>

Access rights to assets

Just as for pages, access rights can be applied to assets, such as folders, blocks and media, in the content structure. You can define specific access rights from the "Root" level and all the way down, including the **Recycle bin** (Trash) and **For All Sites** that stores blocks and media. Blocks and media share the same folder structure.



If you want to [automatically publish media that are uploaded to the website](#), editors who upload must have **Publish** access rights in the folder (under **For All Sites**) to which the media are uploaded. Also, editors must have **Create** access rights in the **root** level of the website to create blocks.

Set Access Rights for "Alloy Track targeted" ?

Restore access rights in EPiServer CMS for items that you have, for example, completely removed access to. You can change all rights on all items.

- Root
 - Start
 - Recycle Bin
 - For All Sites
 - Alloy Plan
 - Alloy Track
 - Alloy Meet
 - Marketing
 - Campaigns
 - Alloy Track targeted**
 - Alloy Track jumbotron
 - About Alloy Track
 - Download Alloy Track form
 - Installing editorial

Add Users/Groups

	Read	Create	Change	Delete	Publish	Administer
Administrators	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Everyone	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Site_Editors	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

☐ Inherit settings from parent item
 ☐ Apply settings for all subitems

Save

Should I set access rights for a single user or for a group?

You can set access rights to content for a single user. For example, you can set the access rights so only *Ann* (and system administrators) can edit the *Book a Demo* page. You can add *Ann* to any number of pages and content, and set *Ann*'s access rights to each content item the same (or differently) for each page.

If you have a number of users that need common access to content, managing access rights on a user-by-user basis can be complex. Create [user groups](#) that have similar access needs, add the users to each user group, and then use the user group to set access rights to content. This lets you manage access rights more easily. You can add a user to one or more groups.

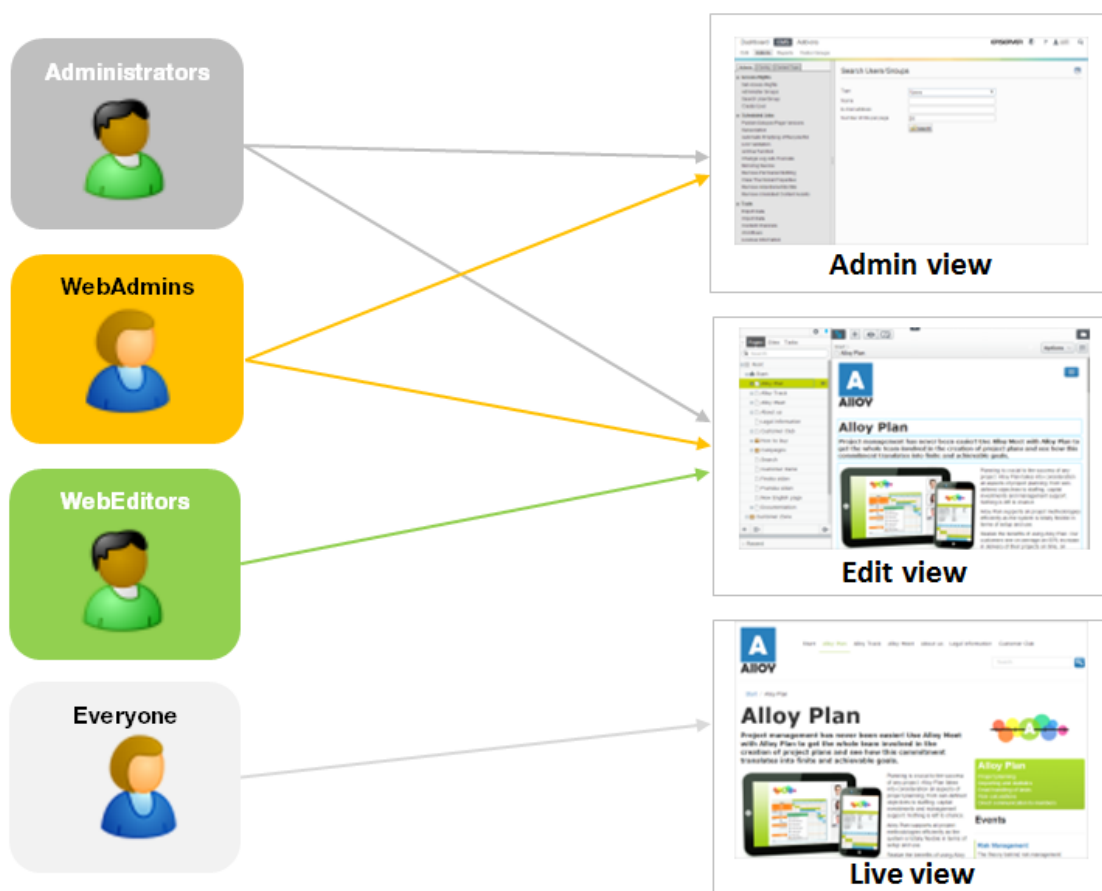
For example, add users *Ann*, *Bob*, and *Cam* to a *Marketing user group* and give access rights to any number of pages and content to the Marketing group instead of each individual. To add *Dan* to all of the Marketing content, (or remove *Ann*), you modify the *Marketing user group*. You do not have to visit each page or content item to update each individual user's access rights.

Built-in user groups

A standard installation of Episerver has built-in user groups that align with user roles. You can extend predefined groups and roles; see [Managing users and user groups](#).



When your website is set up during development, the membership and role providers available for your website need to be configured to use the built-in groups and roles in Episerver.



Group	Description
Administrators	Comes from Windows and is defined when the website is created. An administrator can access all parts of the system, and can edit all website content. Often, administrators are developers setting up or maintaining the website.
WebAdmins	<p>Comes with Episerver and can access both admin and edit views and the administration interfaces for add-ons and visitor groups. To use this group, you must add it through admin view > Admin tab > Administer Groups > Add > WebAdmins.</p> <p>Note: Membership in WebAdmins does not provide editing access in the content structure by default. In most cases, only a few system administrators or “super users” belong to this group.</p>
WebEditors	Comes with Episerver and can access the editing view. To use this group, you must add it through admin view > Admin tab > Administer Groups > Add > WebEditors .

Group	Description
	Add users to this group who need access to the edit view. Then add the users to other groups to give them specific edit rights to content. On large websites, editors are often organized in groups according to content structure or languages.
Everyone	Comes from Windows and provides “anonymous” visitors with read access to website content. All unregistered visitors to a public website are anonymous, meaning that they cannot be identified by the system. Removing access rights for the Everyone group, requires login to access content even if it is published.

Setting access rights

1. Go to admin view > **Admin** tab > **Set Access Rights**. The Set Access view appears with a content tree structure of the website.
2. Click on a node in the content tree (for example, *Marketing*). Typically, a content item shows **Administrators** (with all access rights) and **Everyone** (with Read only access rights). You can change these rights or add new users or groups.
 - » If the users or groups are inactive (grayed out) for a content item, then the content item [inherits the access rights of its parent](#) content item. To set access rights for this content item, clear the **Inherit settings from parent item** check box.
 - » To add settings to the selected node's subitems without affecting their existing settings, select the **Apply settings for all subitems**; see section [Setting access rights for all subitems](#) below.
3. Click **Add Users/Groups**. A dialog box appears.
4. Select the type you want: **Users**, **Groups**, or **Visitor Groups**.
5. Leave the *Name* field blank and click **Search** to display all items of the type you selected. You can also type one or more characters in the *Name* field to filter and display a subset of items. (You can also search for a user by **E-mail** address.)

Search Users/Groups

Type

Name

E-mail address

Search

Add Users/Groups

Existing:

- Bob
- Cam

Add:

- Ann

6. Double-click a user or group in the *Existing* box to move it to the *Add* box and click **OK**.
7. Modify the access rights settings as you want them and click **OK**. The users or groups appear in the Set Access Rights view for the selected content tree item.

Set Access Rights for "Marketing" ?

Restore access rights in EPiServer CMS for items that you have, for example, completely removed access to. You can change all rights on all items.

- [-] Root
 - [-] Start
 - + Alloy Plan
 - + Alloy Track
 - + Alloy Meet
 - + About us
 - + How to buy
 - [-] Marketing
 - + Campaigns
 - + Customer programs
 - + Press releases
 - + Recycle Bin
 - + For All Sites

Add Users/Groups

	Read	Create	Change	Delete	Publish	Administer
Administrators	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Everyone	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Marketing Group	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Ann	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

☐ Inherit settings from parent item

☐ Apply settings for all subitems

Save

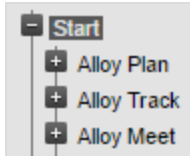


If you set conflicting access rights to content, selected access rights prevail over cleared access rights. For example, Ann is a member of both the *Marketing* and *Support* user groups which each have different access rights set on the same content; *Marketing* has **Publish** rights, but *Support* does not. Ann, who is in both groups, has **Publish** rights to the content, but Bob, who is part of the *Support* group only, does not have **Publish** rights.

Setting inheritance for content subitems

Content inherits access rights from its closest parent item by default. When you set access rights for a content item, the rights apply to it and all subitems that have a selected **Inherit settings from parent**

item option; subitems with this option cleared are not affected. For example, *Alloy Plan*, *Alloy Track*, and *Alloy Meet* all have the same access rights because they inherit the access rights from the *Start* page.




- >> If you break inheritance for *Alloy Meet* and change the access rights on it, the access rights become different from the parent (*Start*) and its two siblings (*Alloy Plan* and *Alloy Track*).
- >> If you then add a *Marketing group* group to *Start*, *Alloy Plan* and *Alloy Track* inherit the *Marketing group* (because inheritance is selected) but *Alloy Meet* does not because its inheritance is unselected.





The following image shows the access rights for the **Marketing** content; it will not inherit from the parent item and any changes of access rights on *Marketing* will not be pushed to subitems unless they have the **Inherit settings from parent item** option selected.

Set Access Rights for "Marketing" ?


Restore access rights in EPiServer CMS for items that you have, for example, completely removed access to. You can change all rights on all items.

- [-] Root
 - [-] Start
 - + Alloy Plan
 - + Alloy Track
 - + Alloy Meet
 - + About us
 - + How to buy
 - [-] **Marketing**
 - + Campaigns
 - + Customer programs
 - + Press releases
 - + Book a demo
 - + Recycle Bin
 - + For All Sites

 **Add Users/Groups**

	Read	Create	Change	Delete	Publish	Administer
 Administrators	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
 Everyone	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
 Marketing Group	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
 Ann	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

☐ Inherit settings from parent item
☐ Apply settings for all subitems

 **Save**

Campaigns is a subitem of *Marketing*. It has **Inherit settings from parent item** selected, so the access rights are identical to that of the Marketing content item.

Set Access Rights for "Campaigns" ?

Restore access rights in EPiServer CMS for items that you have, for example, completely removed access to. You can change all rights on all items.

- [-] Root
 - [-] Start
 - + Alloy Plan
 - + Alloy Track
 - + Alloy Meet
 - + About us
 - + How to buy
 - [-] Marketing
 - [-] Campaigns**
 - + Customer programs
 - + Press releases
 - + Book a demo
 - + Recycle Bin
 - + For All Sites

Add Users/Groups

	Read	Create	Change	Delete	Publish	Administer
Administrators	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Everyone	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Marketing Group	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Ann	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

☒ Inherit settings from parent item
☐ Apply settings for all subitems

Save

Book a demo is also a subitem of *Marketing*, but contrary to *Campaigns*, it has **Inherit settings from parent item** cleared, so its access rights are not the same as the *Marketing* parent content item. (*Ann* does not show up, and *Zach* is listed in the access rights.)

Set Access Rights for "Book a demo" ?

Restore access rights in EPiServer CMS for items that you have, for example, completely removed access to. You can change all rights on all items.

- [-] Root
 - [-] Start
 - + Alloy Plan
 - + Alloy Track
 - + Alloy Meet
 - + About us
 - + How to buy
 - [-] Marketing
 - + Campaigns
 - + Customer programs
 - + Press releases
 - [-] **Book a demo**
 - + Recycle Bin
 - + For All Sites

 **Add Users/Groups**

	Read	Create	Change	Delete	Publish	Administer
 Administrators	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
 Everyone	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
 Zach	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

☐ Inherit settings from parent item

☐ Apply settings for all subitems

 **Save**

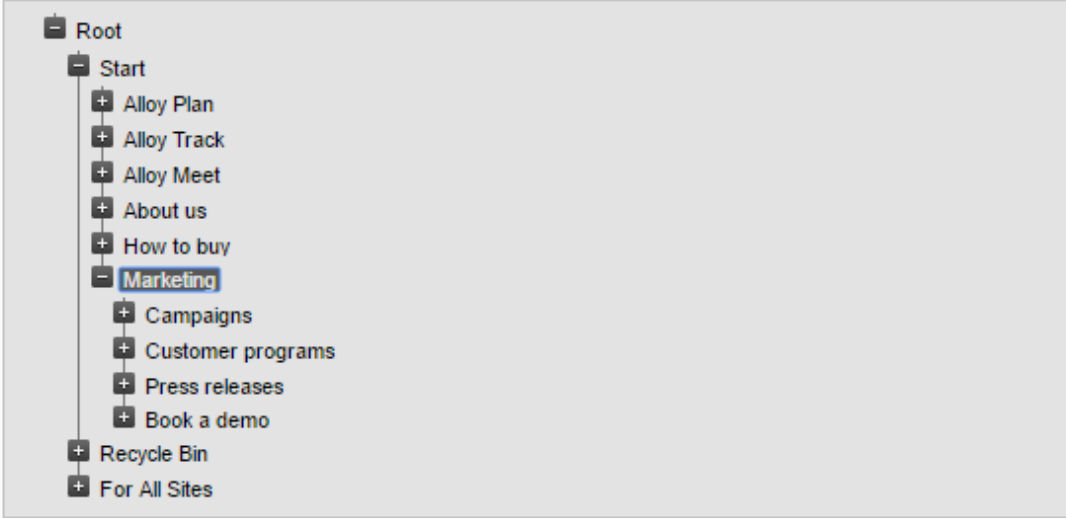
Setting access rights for all subitems

Selecting the **Apply settings for all subitems** check box applies the access rights of the parent item to all its subitems, even if a subitem has inheritance cleared. The option adds settings to a subitem that it did not have before and does not change or remove any existing settings on the subitem.

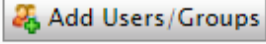
For example, the *Marketing* content item has *Ann* as a user with access rights.





Set Access Rights for "Marketing"

Restore access rights in EPiServer CMS for items that you have, for example, completely removed access to. You can change all rights on all items.

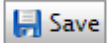


- Root
 - Start
 - Alloy Plan
 - Alloy Track
 - Alloy Meet
 - About us
 - How to buy
 - Marketing**
 - Campaigns
 - Customer programs
 - Press releases
 - Book a demo
 - Recycle Bin
 - For All Sites



	Read	Create	Change	Delete	Publish	Administer
 Administrators	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
 Everyone	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
 Marketing Group	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
 Ann	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

☐ Inherit settings from parent item
☒ Apply settings for all subitems



When you select **Apply settings for all subitems**, *Ann* is added as a user with access rights to *Book a demo* because *Ann* is part of the *Marketing* content item's access rights. *Zach*, who already had access rights to *Book a demo*, remains on the list of access rights, unchanged.

Set Access Rights for "Book a demo" ?

Restore access rights in EPiServer CMS for items that you have, for example, completely removed access to. You can change all rights on all items.

- [-] Root
 - [-] Start
 - + Alloy Plan
 - + Alloy Track
 - + Alloy Meet
 - + About us
 - + How to buy
 - [-] Marketing
 - + Campaigns
 - + Customer programs
 - + Press releases
 - [-] **Book a demo**
 - + Recycle Bin
 - + For All Sites

 Add Users/Groups

	Read	Create	Change	Delete	Publish	Administer
 Administrators	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
 Ann	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
 Everyone	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
 Marketing Group	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
 Zach	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

☐ Inherit settings from parent item

☐ Apply settings for all subitems

 Save

If a parent item and a non-inheriting subitem have the same user or group, and the access rights for the user or group differ between the parent and the subitem, the parent's settings are applied when you select **Apply Settings for all subitems**. For example:

- » If the *Marketing* parent item has user *Ann* with only *Read* access set, and *Book a Demo* has user *Ann* with all access rights set, then **Apply Settings for all subitems** resets Ann's access rights on *Book a Demo* to only *Read* access.

- » Conversely, if *Marketing* has user *Ann* with all access rights, and the subitem has user *Ann* with only *Read* access, **Apply Settings for all subitems** gives user *Ann* all access rights on the subitem.

Removing a user or group from the access rights list

To remove a user or group from the access list, clear all of the access rights for that user or group and click **Save**.

Using a visitor group in an access rights list

Visitor groups are used by the personalization feature, and you need administration access rights to manage visitor groups. If you want an editor to manage visitor groups without providing access to the entire admin view, you can make the editor a member of **VisitorGroupAdmins**. This group provides access only to the **Visitor Groups** option in the global menu. **VisitorGroupAdmins** comes with Episerver but you must add it through admin view > **Admin** tab > **Administer Groups** > **Add** > **VisitorGroupAdmins**.

You can set specific access rights for visitor groups, letting them view specific “hidden” content that is not otherwise publicly available. For example, you may want only members of the *Visitors from London* visitor group to have access to a *Family day at the zoo* page with a discount coupon.

This feature is useful if you want to create a “customer area” for registered customers on your website. Being a member of a visitor group requires a registration and login to access the content.

1. Go to the admin view > **Admin** tab > **Access Rights** > **Set Access Rights**.
2. Select a node in the content tree.
3. Click **Add Users/Groups**.
4. In the Type drop-down list, select **Visitor groups** and click **Search** while leaving the **Name** field blank to view available visitor groups.
5. Double-click on a visitor group to move it to the *Add* box. Click **OK**.

Set Access Rights for "Family day at the zoo" ?

Restore access rights in EPiServer CMS for items that you have, for example, completely removed access to. You can change all rights on all items.

```

graph TD
    Root[Root] --> Start[Start]
    Start --> AlloyPlan[Alloy Plan]
    Start --> AlloyTrack[Alloy Track]
    Start --> AlloyMeet[Alloy Meet]
    Start --> AboutUs[About us]
    Start --> HowToBuy[How to buy]
    Start --> Marketing[Marketing]
    Marketing --> Campaigns[Campaigns]
    Campaigns --> FamilyDay[Family day at the zoo]
    Campaigns --> CustomerPrograms[Customer programs]
    Campaigns --> PressReleases[Press releases]
    Campaigns --> BookDemo[Book a demo]
    Start --> RecycleBin[Recycle Bin]
    Start --> ForAllSites[For All Sites]
  
```

Add Users/Groups

	Read	Create	Change	Delete	Publish	Administer
Visitors from London	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Administrators	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Everyone	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
WebAdmins	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

☐ Inherit settings from parent item

☐ Apply settings for all subitems

Save



Visitor groups can have **read** access only.

Access rights for languages

If your website has content in multiple languages, you can define access rights for languages so editors can create content only in languages to which they have access. Only users with access rights for a

language have it available on the **Sites** tab, and can create and edit content in that language. See [Managing website languages](#).

Add-ons

Access rights for add-ons

Add-ons are plug-ins for extending Episerver functionality.

If you want an editor to manage add-ons without providing access to the admin view, make the editor a member of **PackagingAdmins** group which provides access only to the **Add-ons** option in the global menu.

PackagingAdmins comes with Episerver but you must add it through admin view > **Admin** tab > **Administer Groups** > **Add** > **PackagingAdmins**.

Some add-ons also may have specific user groups defined to access the functionality. See the documentation for each add-on in the online user guide to find out more.

Commerce

Access rights for Commerce

If you have Episerver Commerce installed on your website, see the Commerce access rights section in the Commerce User Guide .

Find

Access rights for Episerver Find

If you have added Episerver Find to your website, see the Find access rights section in the Find User Guide.

CMS

Managing users and user groups

For easier and safer maintenance, base [access rights](#) on **user groups** rather than individual users.

You can administer user credentials in the following ways:

- » Manage users and user groups from the CMS administration view.
- » Manage users and user groups in Windows.
- » Develop a customized role and membership provider.



Users and groups created in the Episerver CMS admin view are available from admin view only; they are not accessible from Windows. You cannot add users created in Windows to groups created in Episerver. See the [technical documentation on Episerver World](#) for information about working with membership and role providers.

Smaller organizations with few editors tend to use the CMS administration view, whereas larger organizations with many editors tend to use the other options. You can combine these options.

Creating, editing and deleting users

To add a user in the CMS, do the following:

1. On the **Admin** tab, select **Create User**.
2. Specify a username, password and email address and set the account to **Active**.
3. Select none or more [user groups](#) to which the user should belong and click the arrow (or double click) to place the selected groups in the **Member of** box.
4. Under the **Display Options** tab, you can specify a default language for the user interface (optional) and touch support.
5. Click **Save**.

New User ?

User Information

Display Options

Username

Robert Williams

Password

●●●●●●●●

Confirm password

●●●●●●●●

E-mail address

robert.williams@alloy.com

☒ Active
 ☐ Account locked (too many failed logon attempts)

Provider

Created date

Last login date

Description

Not member of

WebAdmins

Member of

product_editors

WebEditors

Save

To **edit** user settings, search for the user under **Search User/Group** and then click a user name. You can modify properties only for users that are created via self-registration or via **Create User** in CMS.

To **delete** a user, search for the user under **Search User/Group**, click a user name to edit the settings, and click **Delete**. You cannot undo a deletion of a user.

Displaying members of a user group

Select the **Search User/Group** option to display groups and users.



>> **Group view.** Click the desired group name to see members in the group.

Administer Groups







?

Delete or add groups used to assign access rights.

Cancel

	Group	Provider	Delete
	Marketing Group	SqlServerRoleProvider	
1			

Users of group "Marketing Group"

	Name	Provider	Delete
	Ann	SqlServerMembershipProvider	
	Bob	SqlServerMembershipProvider	
	Cam	SqlServerMembershipProvider	
1			

>> **User view.** Click on a user name to display the **Edit User** panel where you can modify group memberships and other user settings.

- » To see all users or groups, leave the **Name** field blank.

Search Users/Groups ?

Type

Users

Name

E-mail address

Number of hits per page

26

Search

	Name	Provider	E-mail address	Description	Approved	Locked out
	Ann	SqlServerMembershipProvider	ann@example.com		✓	
	Bob	SqlServerMembershipProvider	bob@example.com		✓	
	Cam	SqlServerMembershipProvider	Cam@example.com		✓	
	Dan	SqlServerMembershipProvider	dan@example.com		✓	
	Ed	SqlServerMembershipProvider	ed@example.com		✓	
	Fran	SqlServerMembershipProvider	fran@example.com		✓	
	Gran	SqlServerMembershipProvider	gran@example.com		✓	
	Han	SqlServerMembershipProvider	han@example.com		✓	
	Ian	SqlServerMembershipProvider	ian@example.com		✓	
	Jan	SqlServerMembershipProvider	jan@example.com		✓	
	Ken	SqlServerMembershipProvider	ken@example.com		✓	
	Len	SqlServerMembershipProvider	len@example.com		✓	
	Mel	SqlServerMembershipProvider	mel@example.com		✓	
	Nan	SqlServerMembershipProvider	nan@example.com		✓	
	Ollie	SqlServerMembershipProvider	ollie@example.com		✓	
	Pam	SqlServerMembershipProvider	pam@example.com		✓	
	Quince	SqlServerMembershipProvider	quince@example.com		✓	
	Rob	SqlServerMembershipProvider	rob@example.com		✓	
	Stan	SqlServerMembershipProvider	Stan@example.com		✓	
	Tam	SqlServerMembershipProvider	Tam@example.com		✓	
	Una	SqlServerMembershipProvider	una@example.com		✓	
	Van	SqlServerMembershipProvider	van@example.com		✓	
	Will	SqlServerMembershipProvider	will@example.com		✓	
	Xavier	SqlServerMembershipProvider	xavier@example.com		✓	
	Yun	SqlServerMembershipProvider	yun@example.com		✓	
	Zach	SqlServerMembershipProvider	zach@example.com		✓	

1 2

- » To see a subset of users or groups, type one or more letters in the **Name** field. Any names that have the string in them appear in the list.

Search Users/Groups

Type

Users

Name

a

E-mail address

Number of hits per page

26

Search

	Name	Provider	E-mail address	Description	Approved	Locked out
	Ann	SqlServerMembershipProvider	ann@example.com		✓	
	Cam	SqlServerMembershipProvider	Cam@example.com		✓	
	Dan	SqlServerMembershipProvider	dan@example.com		✓	
	Fran	SqlServerMembershipProvider	fran@example.com		✓	
	Gran	SqlServerMembershipProvider	gran@example.com		✓	
	Han	SqlServerMembershipProvider	han@example.com		✓	
	Ian	SqlServerMembershipProvider	ian@example.com		✓	
	Jan	SqlServerMembershipProvider	jan@example.com		✓	
	Nan	SqlServerMembershipProvider	nan@example.com		✓	
	Pam	SqlServerMembershipProvider	pam@example.com		✓	
	Stan	SqlServerMembershipProvider	Stan@example.com		✓	
	Tam	SqlServerMembershipProvider	Tam@example.com		✓	
	Una	SqlServerMembershipProvider	una@example.com		✓	
	Van	SqlServerMembershipProvider	van@example.com		✓	
	Xavier	SqlServerMembershipProvider	xavier@example.com		✓	
	Zach	SqlServerMembershipProvider	zach@example.com		✓	
	mame	WindowsMembershipProvider			✓	

1

Creating and deleting groups in CMS

When you select **Administer Groups** in admin view, all groups are shown irrespective of the provider used on the website. The group provider is shown next to the group name.


- » Click **Add** to create a user group, enter a name, and save your changes.
- » Click **Delete** to delete a user group.

























You can delete only user groups that were created from the CMS. You cannot recover a user group after you delete it.

Administer Groups ?

Delete or add groups used to assign access rights.

 Add

	Group	Provider	Delete
	WebAdmins	SqlServerRoleProvider	
	WebEditors	SqlServerRoleProvider	
	Administrators	WindowsRoleProvider	
	Everyone	WindowsRoleProvider	
	NT AUTHORITY\Authenticated Users	WindowsRoleProvider	
	NT AUTHORITY\Local account	WindowsRoleProvider	
	NT AUTHORITY\Local account and member of Administrators group	WindowsRoleProvider	
	NT AUTHORITY\NETWORK	WindowsRoleProvider	
	NT AUTHORITY\NTLM Authentication	WindowsRoleProvider	
	NT AUTHORITY\This Organization	WindowsRoleProvider	
	Users	WindowsRoleProvider	
1			



You cannot change the name of an existing group. Instead, delete the group and add a new one.

CMS

Scheduled jobs

A **scheduled job** is a service performing a task (job) at a given time interval. An administrator can start a job manually. A standard installation of the Episerver platform with Episerver CMS and Episerver Commerce includes several scheduled jobs. Some are enabled by default with preset values. You can develop customized scheduled jobs for specific website tasks.

Administering scheduled jobs

Manage scheduled jobs as follows:

1. Log in as an administrator and go to the Episerver CMS admin view.
2. Select the desired scheduled job on the **Admin** tab > **Scheduled Jobs**.
3. Select the **Active** box to activate the scheduled job.
 - » To run the scheduled job automatically, set the desired time interval in **Scheduled job interval**. Each scheduled job's run time appears in the **Next scheduled date** field.
 - » To run the scheduled job manually, click **Start Manually** and the job is executed immediately.
4. Click **Save**.

Automatic Emptying of Trash

Specify whether the emptying function is active/inactive and how often trash should be emptied. The job will permanently delete content older than 30 days from trash.

Settings **History**

☒ Active

Scheduled job interval: 1 week

Next scheduled date: 2015-12-15 00:30

Save **Start Manually** **Stop Job**

The **History** tab lets you monitor the status and results when a scheduled job is executed. If a job fails, information about it appears under the **Message** column.

Settings History				
Date	Duration	Status	Server	Message
1/6/2017 11:37:59 AM	<1s	Succeeded	epi-test	0 content items were deleted from recycle bin.

CMS

Built-in scheduled jobs

Archive Function

You can set how often the system archives information after the publication period expires with the **Archive Function** job.



There can be a delay between the time information is unpublished, and when it appears in the archive. This may occur if the archiving job is run only once a day.

Automatic Emptying of Trash

You can set up how often your trash gets emptied with the **Automatic Emptying of Trash** job. With automatic emptying, all content in trash older than 30 days is permanently deleted by default. You can also manually delete Trash permanently.

The job is enabled by default, and set to run weekly.

Change Log Auto Truncate

You can delete items from the change log that are more one month old and do not have any dependencies registered against them by another part of Episerver CMS (for example, Mirroring) with the **Change Log Auto Truncate** job.

The job is enabled by default, and set to run weekly.

Clear Thumbnail Properties

You can clear generated thumbnail images in the Products list and Media list views and add them again with the **Clear Thumbnail Properties** job. Run this job manually if you experience problems with refreshing thumbnails, such as on the website and BLOB-supported content.

Link Validation

You can check links on your website to identify broken links with the **Link Validation** job. The system tries to contact the target for the link to verify that it is responding.

Links are returned only if they are unchecked or checked earlier than the time when the job started. The job continues until no more unchecked links are received from the database. If a large number of consecutive errors is found for external links, in case of a general network problem with the server running the site, the job stops.

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

Marketing Test Monitor

The **Marketing Test Monitor** job handles the starting and stopping of A/B tests based on their start and end dates. If the **Automatically publish the winner ...** setting is enabled, the scheduled job also automatically publishes the winning variant when an A/B test completes, given that the calculated test result is statistically significant with the required confidence level. See [A/B Testing configuration in Tool settings](#).

The job is enabled by default (if you have the A/B Testing feature installed), and set to run every 30 minutes.

Mirroring Service

You can set the frequency of mirroring content between websites with the **Mirroring Service** job. If your website is set up to mirror content between websites, you can manually mirror content or automatically do so at specific intervals. See also: [Mirroring](#).

Monitored Tasks Auto Truncate

The **Monitor Tasks Auto Truncate** job truncates the status of monitored tasks. It is a clean-up job that deletes 30 days of statuses of monitored and completed jobs.

The job is enabled by default, and set to run weekly.

Notification Dispatcher

Set the **Notification Dispatcher** job to determine how often Episerver CMS sends notifications of new or updated comments or replies posted in projects by a notification provider (for example, an email provider). Notification messages are sent to:

- » users who are tagged in a comment or reply
- » users who receive replies to their comments
- » users who receive comments on their project actions (such as setting a project item to Ready to publish)
- » other users who have previously replied to the same comment

A notification is not sent if no new comments or replies were posted since the job last executed.

The job is enabled by default, and set to run every half hour.

Notification Message Truncate

The **Notification Message Truncate** job truncates or deletes 3 months old notification messages that could not be sent and are still in the system.

The job is enabled by default, and set to run every day.

Publish Delayed Content Versions

The **Publish Delayed Content Versions** job lets you define how often the system checks for content

versions with a specific future publication date and time.

The job is enabled by default, and set to run hourly.

Remove Abandoned BLOBs

Episerver CMS can store media files in a cloud service instead of the website's database. When you delete CMS files, this job makes sure the stored data is deleted from the BLOB provider.

The job is enabled by default, and set to run weekly.

Remove Permanent Editing

You can clear the **Permanently Mark as Being Edited** marking of pages in the edit view (if editors have forgotten to remove the marking) with the **Remove Permanent Editing** job.

The job is enabled by default, and set to run hourly.

Remove Unrelated Content Assets

You can delete content folders that contain media related to deleted content items with the **Remove Unrelated Content Assets** job.

The job is enabled by default, and set to run weekly.

Subscription

The **Subscription** feature lets visitors set the frequency for receiving subscription information. This job checks for information from the system to be included and distributed in the subscription send-out.

Commerce

Commerce-related scheduled jobs

Installing Episerver Commerce adds scheduled jobs to your implementation. See Scheduled jobs in the Commerce user guide.

Find

Episerver Find-related scheduled jobs

See Administration and configuration in the Episerver Find user guide for information about scheduled jobs for Find.

Other scheduled jobs

Customized modules and add-ons may have their own specific scheduled jobs. See the technical documentation for each module to find out more.

Exporting and importing data

You can export and import data between Episerver websites. This function is widely used by developers building new functionality in a test or development environment. When you complete work and the information is ready for the production environment, use the export and import features to transfer the data between websites.

Exporting data

You can export the following: content items, content types, frames, dynamic property definitions, tabs, categories, files, and visitor groups.

Select a type of item to export, to display the available items of that type.

Export Data

Export data from one EPiServer CMS to another.

☒ Export content items

Select part of structure

- Root
 - Start
 - Alloy Plan
 - Alloy Track
 - Alloy Meet
 - About us
 - How to buy
 - Campaigns
 - Search
 - Recycle Bin
 - For All Sites
 - Customer Zone

☒ Include sub items
☒ Export files that the pages link to
☐ Automatically export dependent content types

☒ Export content types

<input type="checkbox"/> ContainerPage	<input type="checkbox"/> NewsPage	<input type="checkbox"/> SiteLogotypeBlock
<input type="checkbox"/> LandingPage	<input checked="" type="checkbox"/> ProductPage	<input type="checkbox"/> JumbotronBlock
<input type="checkbox"/> ContactPage	<input type="checkbox"/> ButtonBlock	<input type="checkbox"/> EditorialBlock
<input type="checkbox"/> TeaserBlock	<input type="checkbox"/> ContactBlock	<input type="checkbox"/> FormBlock
<input type="checkbox"/> ArticlePage	<input type="checkbox"/> VideoFile	<input type="checkbox"/> SysRoot
<input type="checkbox"/> StandardPage	<input type="checkbox"/> GenericMedia	<input type="checkbox"/> SysRecycleBin
<input type="checkbox"/> StartPage	<input type="checkbox"/> ImageFile	<input type="checkbox"/> SysContentFolder
<input type="checkbox"/> SearchPage	<input type="checkbox"/> PageListBlock	<input type="checkbox"/> SysContentAssetFolder

☐ Export frames
☐ Export tabs
☐ Export categories
☐ Export property settings
☐ Export visitor groups

Export
Test Run with Error Log

To export content items

1. Select **Export content items**, and then an item to export in the tree structure. If your content items contain multiple language versions, all language versions are included in the export package.
2. Optional: Select any of the three check boxes:
 - » **Include sub items.** Exports the item's children as well.
 - » **Export files that the pages link to.** Exports global assets (such as blocks and images and so on) that the selected item links to.



Note: Local assets (saved under For this Page) are included in the export.

- » **Automatically export dependent content types.** This option is mostly used for older untyped pages, and specifies that the content type is included in the export. For newer, typed pages or if the import website already has this content type, it is not necessary to select this option.

3. Click **Export** to download the file package. Your export package is saved to your web browser's default download location.



To update a single content item through export and import; deselect **Include sub items** and export the item. Then import the item and make sure **Update existing content items with matching ID** is selected.

Importing data

With the **Import Data** function, you can retrieve information exported from the same or another Episerver website.

1. Select the file package to import. Files must end with **.episerverdata* for the import to work.
2. Click **Upload and Verify File** to verify the file content. The files are read and checked, and verification information appears.
3. Select the destination for the imported files.
4. Select or deselect **Update existing content items with matching ID**:
 - » Select the check box if you want to keep the same GUIDs for imported items (such as pages, blocks and files) as they had on the exporting site. The import checks whether a GUID already exists and, if it does, that item is updated (if the imported item had a changed date that is later than the existing item). This means that content items with the same IDs are replaced instead of added.

If your exported pages contained links to global blocks and media, you must select

Export files that the pages link to when exporting, for the linked global blocks and media to be updated during the import.

- » Deselect the check box if you want to import items with new IDs instead. If you import to the same website as you exported from, blocks and media are merged into folders with the same name in the assets pane.

Duplicated items get a number added to the item name. For example, exporting item *ABC* and importing it as a copy on the same website results in two items, namely *ABC* and *ABC2*. This also affects the URL, which in the case of the copied item would be *www.examplesite.com/abc2*.

5. If your export package contains multiple language versions, select **All** if you want to import all language versions or one specific language to import only that language version.
6. Click **Begin Import**.

CMS

Managing custom content types

The edit view in Episerver only displays the default content types, such as pages, blocks, media, and products. Your website may be set up with custom content types (that are implementing IContent) and these are not accessible via the navigation and assets panes in edit view. However, they are accessible from admin view > **Admin** > **Tools** > **Manage Content**.

Browse to the content item you want to change and select one of the options:

- » **Edit content.** Opens the item in the edit view and you can edit it as any default content item.
- » **Manage access rights.** Opens the Set access rights dialog box for the specific item. For details on access rights and how to change them, see [Access rights](#).
- » **Delete.** Deletes the item. It is not possible to restore the item.
- » **Move to trash.** Moves the item to trash. From trash, you can restore the item as long as the scheduled job, **Automatic Emptying of Trash**, has not run.



Change Log

By default, all changes to pages, files and directories are logged in the **Change Log** system which is found in admin view > **Admin** > **Tools**. You can filter the information in the change log, making it easier to find relevant information.

Change Log ?

The change log displays all changes to pages, files and directories in the system and can be filtered by change date, category, action and changed by field.

Change date from

...

Change date to

...

Category

▼

Action

▼

Changed By


Maximum number of items per page

25

Start with sequence number

Include archived items

☐

 Read

Sequence Number	Change Date	Category	Action	Changed By	Data
-----------------	-------------	----------	--------	------------	------

← Previous

Next →

1. In the change log, view changed items by filtering on one or several of the following options:

Field name	Description
Change date from	Select a date and a time to view only items that were changed after this time.
Change date to	Select a date and a time to view only items that were changed before this time.
Category	<p>From the Category drop-down, you can select an activity type:</p> <ul style="list-style-type: none"> » Content to display changed content items. This option displays items such as pages, blocks and media. » Message to display changed messages. (Messages are a type of activity in the projects feature.) » Project to display changes that are associated with a project. » Approval to display changes that are associated with a content approval sequence. <p>If you do not select an option from the drop-down list, you will see changes to all types of activities.</p> <p>Note: Website developers can configure which categories are available, so you may see other categories than the ones mentioned here.</p>
Action	<p>You can filter on actions, such as Delete, Publish and Rejected.</p> <p>Note: Website developers can configure which actions are available.</p>
Changed by	To filter for a specific user, enter the Episerver CMS user name.
Maximum number of items per page	Limits the displayed number of items on the page. Click the Previous and Next arrows to browse through the list of items.
Start with sequence number	Enter a specific sequence number to start listing the items in the change log. For example, if you have performed a previous filtering, you can use the sequence number from that occasion and repeat that filtering.

2. Click **Read** to run the query. A list of matching change log items appear.

To remove all change log items that are more than one month old and without dependencies, use the [Change log auto truncate scheduled job](#).

System settings

System settings let you define certain settings for the Episerver CMS installation, such as to activate globalization, change the error handling, and configure version management of content.

General tab

System Settings

WARNING! Incorrect changes on this page may cause your website to stop responding.

General Editing

Error handling in Episerver CMS

Active for remote visitors

Handler for subscription updates

Episerver CMS default

☐ Encrypt the connectionStrings.config file

☒ Enable globalization

☐ Detect language via browser's language preference

☐ Disable deletion of content versions

Save Cancel

Setting	Description
Error handling in Episerver CMS	Select how you want errors to be handled; active for all visitors, remote visitors, or disabled.
Handler for subscription updates	The subscription function in Episerver lets visitors receive information about new and updated pages. Depending on whether multi-language is supported, you can select how the subscription dispatch is managed. This list can also include your own solutions for the subscription function.
Encrypt the connectionStrings.config file	Select to encrypt the connectionStrings.config file, which contains sensitive information sent to and from the database.
Enable globalization	Select to activate management of content in multiple languages (globalization).
Detect language via browser's language preference	Select to activate languages to be shown based upon the visitor's browser settings.
Disable deletion of con-	Select to disable the ability of editors to delete versions of pages,

Setting	Description
Content versions	blocks and files. Selecting this also disables the automatic deletion of versions caused by the Maximum number of versions field on the Editing tab.

Editing tab

System Settings
?

WARNING! Incorrect changes on this page may cause your website to stop responding.

General
Editing

Path to CSS file for the Editor
~/Static/css/Editor.css

Maximum number of versions
20

☐ Unlimited versions
☒ Automatically publish media on upload

Save
Cancel

Setting	Description
Path to CSS file for the rich-text editor	Controls the styling options (such as heading levels and so on) available to the editor in the rich-text editor. This can be the same or similar CSS file as the site uses for styling content so that the editors get the same appearance as the site when editing content.
Maximum number of versions	<p>Specify the number of previously-published versions of content items (for example, pages or blocks) that are stored. The currently-published version and draft versions are not counted.</p> <p>For example, if you enter 3, Episerver CMS stores three previously-published versions. If that is the case for a content item and you publish a new version, the oldest version is removed.</p> <p>Default value is 20 versions.</p> <p>This field is ignored if the Unlimited versions or Disable deletion of content versions box is selected.</p>
Unlimited versions	<p>Stores an unlimited number of versions of content items (such as pages or blocks). This option may result in a large version list, which can be difficult to use unless you manually delete unwanted versions.</p> <p>If you check this, the value in the Maximum number of versions field is ignored.</p>

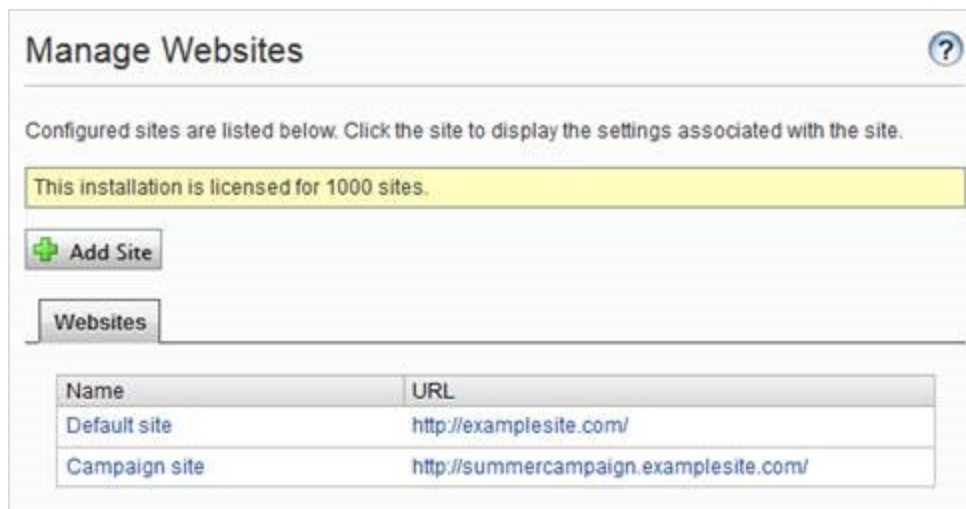
Setting	Description
Auto publish media on upload	<p>Select to automatically publish and index media when uploaded to the web-site. Note: If a user uploads media but does not have publishing rights in the folder to which the media is uploaded, then the uploaded documents are not published (for example, images are not displayed when used in content). Ensure that editors who upload media also have the proper access rights set in the media folder structure.</p> <p>Also, if this check box is selected and an editor (with the proper access rights) uploads media, it is published and indexed immediately, so can be found by search engines, even if no published page contains links to the media.</p> <p>If the projects feature is enabled and the editor has a project selected when uploading media, this setting is ignored. The uploaded media is associated with the project instead, and must be manually published or published via scheduling.</p>

CMS

Managing websites

You can easily add and remove websites from an Episerver installation, perhaps to create short-lived campaign websites.

On the **Config** tab > **Manage Websites**, you can see an overview of existing websites in your installation. These websites share the same database, content types and templates, making it easy to set up new websites. You can also define whether content, such as blocks, folders, and media, should be shared or site-specific.



You can add new websites in the following ways:

- » **Single-site setup** lets your installation have one CMS site mapped to one IIS instance. The IIS mapping is with a wild card or a specific host name. You can have several single sites with separate databases and code base on the same server. In that case, you have a separate admin interface for each site.
- » **Multi-site setup** lets you have a single CMS site as a base (default site), and can create new sites in admin view that share the same root page, database and code base. The additional sites are automatically mapped and require no additional configuration (if the base site is mapped to wild card), or they need manual configuration of host name.

When you work in a multi-site setup, you see all sites in the same interface, which makes it easy to work with them. One reason to run a multi-site setup with specific host name mapping (that is, a different IIS instance per CMS site) is that you can use different application pools, which means that if one site fails, the other sites continue to run.

Requirements

The following requirements must be met to manage websites in admin view:

- » **Available licenses.** A notification message informs you of the number of sites allowed by the license available for the installation. See **License Information** on the **Admin** tab for information.
- » **Unique URL.** In admin view, each website must have a unique URL and start page in the content tree. Start pages cannot be nested.
- » **Domain mapping must be configured in IIS.**
 - » For multi-site setup, the IIS must be configured to respond to any host name.
 - » For single-site setup, each separate CMS site must have an IIS site configured.

Adding and updating a website from admin view

On the Websites tab, you can click a site to see detailed information about its settings. You can also update the site information.

To add more sites to your installation, click **Add Site**. Add the following information when creating and updating site settings for your installation:

Site setting	Description
Name	Type a name that identifies the website, such as <i>Example Site</i> .
URL	Enter the URL for the site, such as <i>http://examplesite.com</i> . If your CMS or Commerce site is using Unicode characters in the URL segments, internationalized domain names should be registered in Punycode format. See also: Internationalized Resource Identifiers (IRIs) on Episerver World.
Start page	Select the page to which the visitor is sent if only a host name is specified.
Use site-specific assets	Select this check box to ensure that assets, such as blocks and media, for this site are not available for use on other sites in the installation. This option affects the folder structure editors see in the assets pane.
Host name	Optional. Enter a specific URL, such as <i>examplesite.com</i> . If you do not name the website, it is automatically named with the URL you have entered. One of the sites in the installation must be bound to the * host name. That site is used as a fallback when an exact match for the host name used by the visitor cannot be found. This setting is less important in a single-site scenario, because you can have only one site configuration. However, in a multi-site scenario, you must make sure that host bindings active in IIS are mirrored in the corresponding site configuration. For example, you want to add <i>examplesite.se</i> . Usage: The host name list is evaluated by the application in two different scenarios:

Site setting	Description
	<p>» Request routing. When serving a request, the application evaluates the host list to see which site and language (culture) that should be served.</p> <p>» Cross-site linking. When generating links to another site or culture, the host list is evaluated to find the host name to use for constructing the link URL.</p> <p>Note: A wildcard * mapping must be accompanied by an explicit host name to support cross-site link generation.</p>
Culture	Select the default language for when a visitor accesses the website using the host name.
Type	<p>» Primary host. A primary host is the preferred host name when generating links between sites or languages (cultures). If no host is defined as primary, the first non-redirected host and non-edit host is used. You can define only one primary host per language plus one primary that is unbound to any language.</p> <p>» Edit host. An editing host is the preferred host name to use when editing a site. This host name is used for all links between sites when the users are in the editing view. If no editing host is defined, the primary or first found host is used. You can define only one editing host per site and you cannot bind it to any language. Users are not forced to the edit host for editing and remain on their current host if the editing view is requested from another host on the site.</p> <p>» Redirection host. A redirection host defines that requests using this host name are redirected to a different host name. Such requests are redirected to the primary host or, if none is defined, the first non-redirected host found. You can set redirection to permanent or temporary, which determines the type of HTTP redirect status that should be used. Redirected host names are never used when generating links. There can be any number of redirection hosts defined as long as there is at least one primary or standard host name bound to the same language.</p>
Scheme	Select the preferred scheme to be used for this host. This affects only the generation of links to the site as incoming requests are matched to the host name regardless of scheme.

EXAMPLE: Default website with different host names, languages and redirection types

The following example shows a default website with several host names, languages and redirection types configured:

Edit Website ?

Settings associated with the site.

This installation is licensed for 1000 sites.

Settings

General

Name

URL

Start page ...

☐ Use site-specific assets

Host Names

Host Name	Culture	Type	Scheme	
examplesite.com				
examplesite.se	sv	Primary		
www.examplesite.se	sv			
redirected.se	sv	Redirected (permanent)		
eamplesite.no	no			
redirected.no	no	Redirected (permanent)		
*		Redirected (temporary)		

Add

Delete Site Save Cancel

This example would lead to the following behavior:

- » A request to <http://redirected.se> is redirected to <http://examplesite.se> using an HTTP 301 response.
- » A request to <http://www.examplesite.se> is served the Swedish content.



Canonical links added in the templates should point to <http://examplesite.se>

- » A request to <http://redirected.no/page/> is redirected to <http://examplesite.no/page/> using an HTTP 301 response as this is the only Norwegian host that is not redirected.

- » A request to `http://redirected.com` is redirected to `http://examplesite.com` using an HTTP 302 response as per the wild card specification.

EXAMPLE: Campaign website

The following example shows a campaign website:

Edit Website

Settings associated with the site.

Settings

General

Name

Campaign site

URL

`http://summercampaign.examplesite.cor`



Start page


Start [5]

...

☐ Use site-specific assets

Host Names

Host Name	Culture	Type	
summercampaign.examplesite.com			 

 Add

Delete Site

Save

Cancel

Managing website languages

Editors can create content in a particular language after you add and activate the language, and set an access level for a language. This prevents unauthorized editors from creating or editing pages in that language.

Language overview

Go to the **Config** tab > **Manage Website Languages**. The installed website languages appear. You can see which languages are enabled for active editing in edit view, and the order in which languages are available. You can adjust the order of the languages using the arrows to the left of the language. To change a language's settings, click its name.

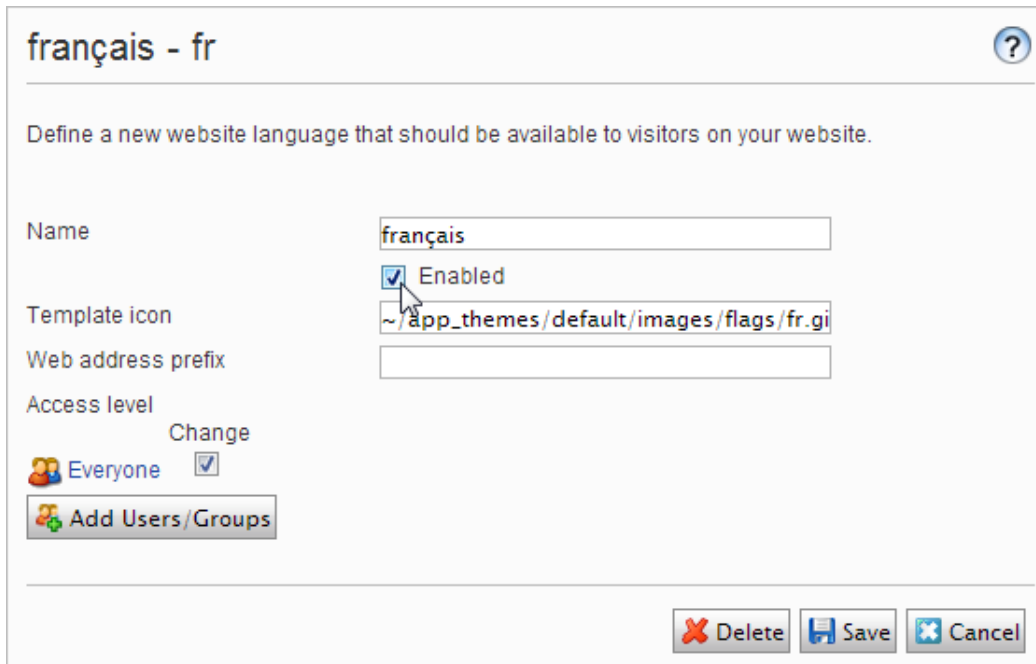
Manage Website Languages ?						
Define the languages that should be available to visitors on your website.						
+ Add Language						
Move Up	Move Down	Name	Language Code	Enabled	System Icon	Template Icon
	↓	English	en	✓		
↑	↓	English (United Kingdom)	en-GB			
↑	↓	English (New Zealand)	en-NZ			
↑	↓	English (South Africa)	en-ZA			
↑	↓	Deutsch	de	✓		
↑	↓	français	fr			
↑	↓	español	es			
↑	↓	svenska	sv	✓		
↑	↓	norsk	no			
↑	↓	dansk	da			
↑	↓	suomi	fi			
↑	↓	Nederlands	nl			
↑	↓	Nederlands (België)	nl-BE			
↑		português (Brasil)	pt-BR			

Adding and enabling languages

Before an editor can edit content in different languages, you need to add and enable the languages in the admin view and then enable them for editing in the CMS edit view.

1. Adding and editing languages

- a. On the **Config** tab, select **Manage Website Languages**.
- b. Click a language to edit its settings, or click **Add Language** to add a new language. A list of available language codes appears. Select a language code by clicking the name.
- c. In **Name**, enter a name for that language to be shown in the edit view. The field contains the name of the language encoding, but you can change this if you want.
- d. Select **Enabled** if you want the language to be active for editing in edit view. This option also affects whether the language is available to website visitors. A disabled language is not visible in the edit view. Existing content in that language is still accessible, but it cannot be edited.



français - fr ?

Define a new website language that should be available to visitors on your website.


Name:


☒ Enabled

Template icon:

Web address prefix:

Access level: Change

 Everyone ☒

 Add Users/Groups

- e. In the **Template icon** field, enter the path to an icon that symbolizes the language. Several flags are stored in the *C:\Program Files\Episerver\CMS\<release>\Application\App_Themes\Default\Images* folder. If you want to make your own icons, make them 15x15 pixels so they fit properly in the edit view.
- f. In the **Web address prefix** field, you can provide a specific prefix to show the content of the relevant language. If you do not provide a prefix, the language code is used, such as *www.company.com/nl*.
- g. Use **Access level** to define which editor groups have access to create and edit content in this language (see below). When you add a language, it is available for the **Everyone** group by default. Only users with access rights for a language have it available on the **Sites** tab, and can create and edit content in that language.

An editor's create and edit access rights to content *and* language determine which actions the editor can perform on the content. This means that an editor must have edit access for a specific language and a specific item to edit the content in that language.

When a language has **Everyone** as access rights, access rights for an item apply to all languages. This also means that an editor with delete access rights for content can delete an entire node with content in all languages, including content in languages to which the editor does not have access.



If you remove the **Everyone** group in a certain language, it may cause some editors to lose their access rights to create and edit content in that language.

h. Click **Save**.

2. Enabling a language on a website (if not already done)

- a. In the admin view, go to the **Config** tab > **Manage Website Languages**.
- b. Click on the desired language in the list.

c. Select the **Enabled** check box and click **Save**.

3. Enabling a language for editing in CMS

This step makes the language available for content creation by editors. A language can be made

available for the entire site structure, or for parts of it. By default, subpages inherit language settings from their parent page.

- In the CMS page tree, select the root page for the branch for which you want to enable the language. In this example, you want to make "French" available for the entire site, so the language setting is defined on the start page.
- Open the page in **All Properties** editing.
- Select **Tools** and **Language Settings** in the header.
- Under **Available Languages**, select **Change**.
- Select the language you wish to enable, click **Save**, and close the dialog.

Language Settings

Language Settings for Page "Home"

Settings for Editors

Available Languages

Languages that are defined as available languages only affect Edit mode and not the content displayed to the website visitors. Pages can only be created in Edit mode in languages that are set as "available". It is, however, also possible to access and edit content on pages which have previously been available, but are perhaps not available now.

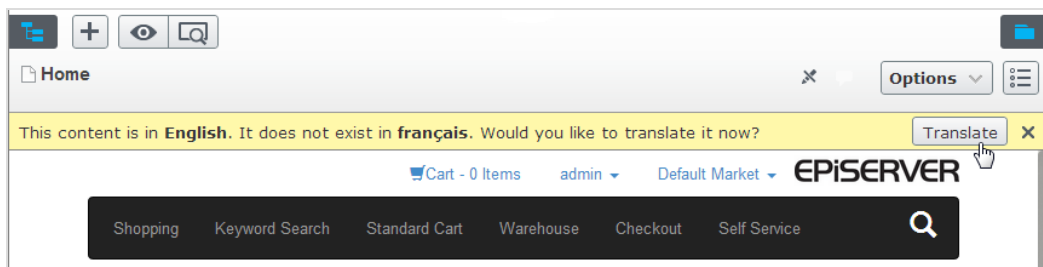
☒ English ☒ français ☒ svenska
☒ Deutsch

Save Cancel

Settings for Site Visitors

Fallback Languages

- For a correct display, the website start page also needs to be available in the new language. To do this, switch to the newly activated language, go to the start page, select **Translate**, then publish it.



Once the language is enabled as described above, it is available for content translation in the Episerver CMS Editor Guide.

Deleting an existing language

Remove a language from the website by opening the language for editing, and clearing the **Enabled** option.

CMS

Managing content approval sequences

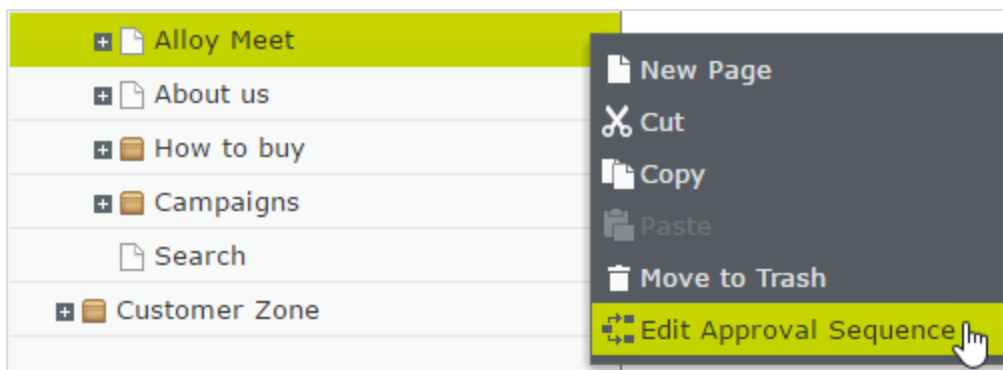
Using content approvals in Episerver CMS is a way to make sure that content is reviewed and approved before it is published. If content approvals were defined for an item, the editor cannot publish it but has to set it as **Ready for Review**. One or more appointed reviewers must then approve the content item before it can be published. The reviewers are defined by an administrator in **an approval sequence**. For a description of content approvals from an editor's perspective, see the Content approvals chapter in the CMS Editor User Guide.

How it works


You define an approval sequence for a specific page in the page tree or for a global or site-specific assets folder in the assets pane. You can then choose to let the item's or folder's children inherit the approval sequence, create a new approval sequence for the children or disable approval sequences for the children. For detailed information how content approval sequences work on assets, see [Content approvals on assets](#).

Both individual users and user groups can be added. The user or user group must have **Change** access rights to the content item. See [Access rights](#) and [Managing users and user groups](#).

The approval sequence overview is opened from a page's or assets folder's context menu:



In the approval sequence overview, you define the number of approval steps, you can have as many as you like, and also the persons responsible for review and approval in each of the steps.



Alloy Track

Approval Sequence


Select the persons you want to include as reviewers in each step. One reviewer from each step must approve the content before it moves to the next step. Each step must have a reviewer for each language the content exists in.

Create additional steps by clicking the '+' button. Rearrange steps with drag and drop.

☒ Enabled
 ☐ Inherited
 ☐ Disabled

Require comment on ☐ Decline ☐ Approve


Display sequence for All Languages ▾




Ready for Review

⋮

Untitled Step



+



Ready to Publish

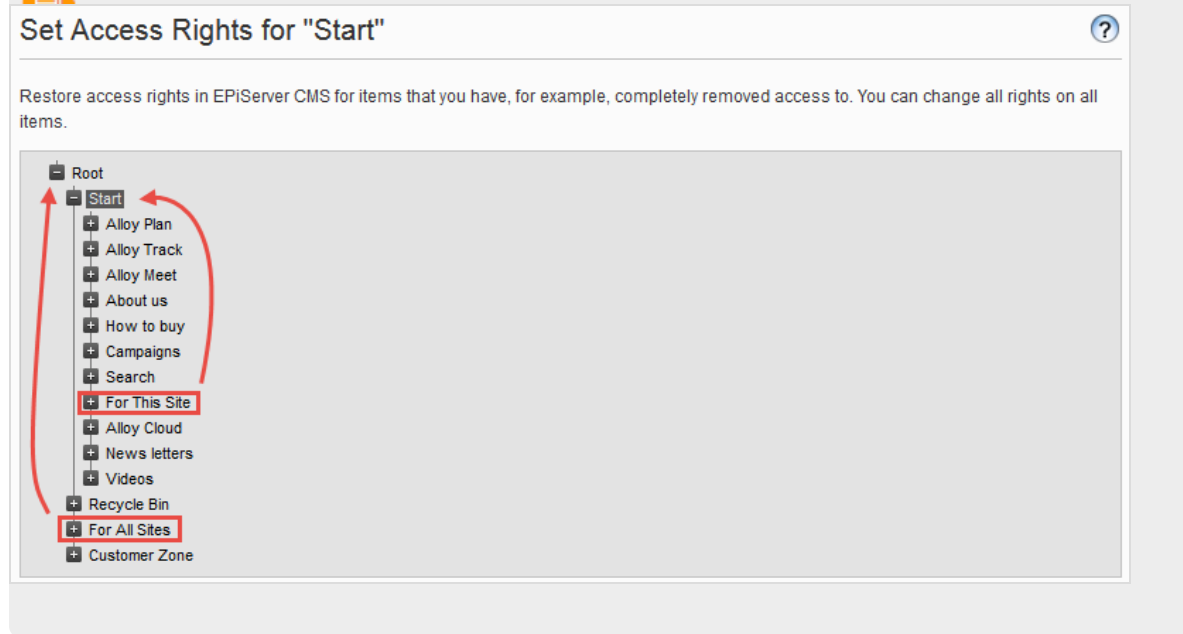
Content approvals on assets

Each page in Episerver can have its own content approval sequence. Assets, such as blocks and media (and also forms and catalogs if you have Episerver Forms and Episerver Commerce respectively installed), cannot have individual approval sequences. Instead, the content approval sequence is set on each assets folder, and all assets in a folder have the same approval sequence set. *Global* and *site-specific assets folders* can inherit their approval sequence from a parent folder (up to the site root), or an administrator can define a unique sequence for it (or disable it completely so that assets in the folder do not have to be approved). If there are no sequence set on a parent item, they inherit the disabled state.



Blocks and media in global (For All Sites) and site-specific (For This Site) folders inherit the content approval sequence from the parent node by default. The content inherits from the **site root**, which is not the same for global and site-specific folders. The global assets folders inherit from **Root**, while site-specific assets folders inherit from the site's root, that is **Start** in the

example image below.



Local assets folders inherit their approval sequence from the page they are associated with. See Folders in the CMS Editor User Guide for a description of global, site-specific and local folders.

What happens if I want to move folders or assets that have content approval sequences set?

Moving folders and assets that have content approval sequences set, works like the following descriptions.

Folders

- » Moving a **folder** to another **global or site-specific folder**. The folder keeps its original approval sequence. You can move the folder even if items in the folder are in review.
- » Moving a **folder** to a **local assets folder**. The folder's approval sequence is changed to the local assets folder's sequence. You cannot move the folder if items in the folder are in review.

Assets

- » Moving an **asset** to a **global or site-specific folder**. The approval sequence on the asset is changed to the new folder's approval sequence. You can move an item even if it is in review. However, in that case, it continues its original content approval sequence until it is approved or rejected. After that it has the same approval sequence as the new folder.
- » Moving an **asset** to a **local asset folder**. The approval sequence on the asset is changed to the new folder's approval sequence. You cannot move the asset if it is in review.



The Blocks and Media folders in the assets pane are actually the same folders in the software and share the same content approval sequences; the Blocks and Media tabs in the assets pane are merely a way of filtering out blocks if you are in the Media tab and vice versa. This means that if Adam is set as a reviewer on block folder *Bunnies*, Adam is also a reviewer of media in media folder *Bunnies*.

As a result, if you edit a block in the *Bunnies* folder which links to images in the media folder *Bunnies*, and set the block to **Ready for Review**, the same content approval sequence is triggered also for the images.

Forms and catalogs have their own structures, so even if you have a Commerce catalog named *Bunnies*, it does not get the same content approval sequence as the *Bunnies* folders for blocks and media.

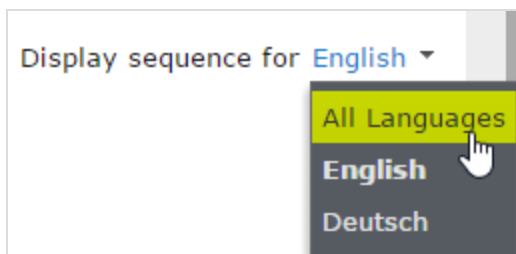
Assets added to an assets folder with a content approval sequence set are not auto published, even if the auto publish option is set (see Auto publish media on upload in the CMS Administrator User Guide).

Content approvals on multi-language sites

If you are working with a multi-language site, you can define different reviewers for the different languages in each step. Each language must have at least one reviewer, but it is recommended to have at least two reviewers per language.

Items, such as images, that do not have a language set can be approved by any reviewer (even by reviewers that only have access to a specific language).

You can view how the approval sequence is defined for all languages or for each language individually by using the **Display sequence for [language]** drop-down list.



Setting up an approval sequence

Setting up an approval sequence (single language website)

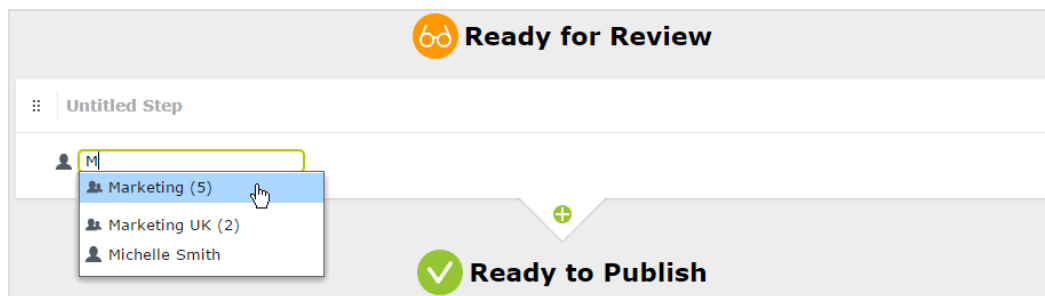
This section describes how to set up an approval sequence for one language. If your website uses multiple languages, see [Setting up an approval sequence on a multiple languages website](#).


1. Open the approval sequence overview from an item's context menu (in the navigation pane or assets pane).
2. In the first step, type the first letter of the reviewer's name. Select the reviewer from the list of suggestions. You can also add a user group. Groups have a special group icon in the list of suggestions and you can also see how many users are included in the user group.



User groups and individual reviewers must have at least **Read** and **Change access rights** to the item to review and approve it.

It is recommended not to add large groups. Partly because users tend to think someone else will review if there are many responsible reviewers, and partly because many notifications will be sent out, which may annoy users. There is a setting in the `web.config` file which triggers a validation warning when you add a group with members exceeding this setting, and it also limits the amount of notifications sent to the users in the group. If it is set to 100, only 100 users will get email notifications even if the group contains 150 users. See [Configuring the CMS user interface](#) in the [CMS Developer Guide](#) on [Episerver World](#).



3. If you added an individual reviewer, add at least one more reviewer to the step. You should have at least two reviewers in each step, in case one of the reviewers is unable to review and approve.
4. Optional: Click **Untitled Step** to rename the step to something more descriptive, for example *Product marketing* or *ISO compliance review*.
5. Optional: To add more steps to the approval sequence, click the add button: . You can rearrange the steps by drag and drop.
6. Optional: To require a reviewer to enter a reason for approving or declining the content, select the **Approve** or **Decline** (or both) check boxes under **Require comment on**.
7. Click **Save**.

Setting up an approval sequence for children items


When you have defined an approval sequence for an item, you can define if its children have to be approved or not.

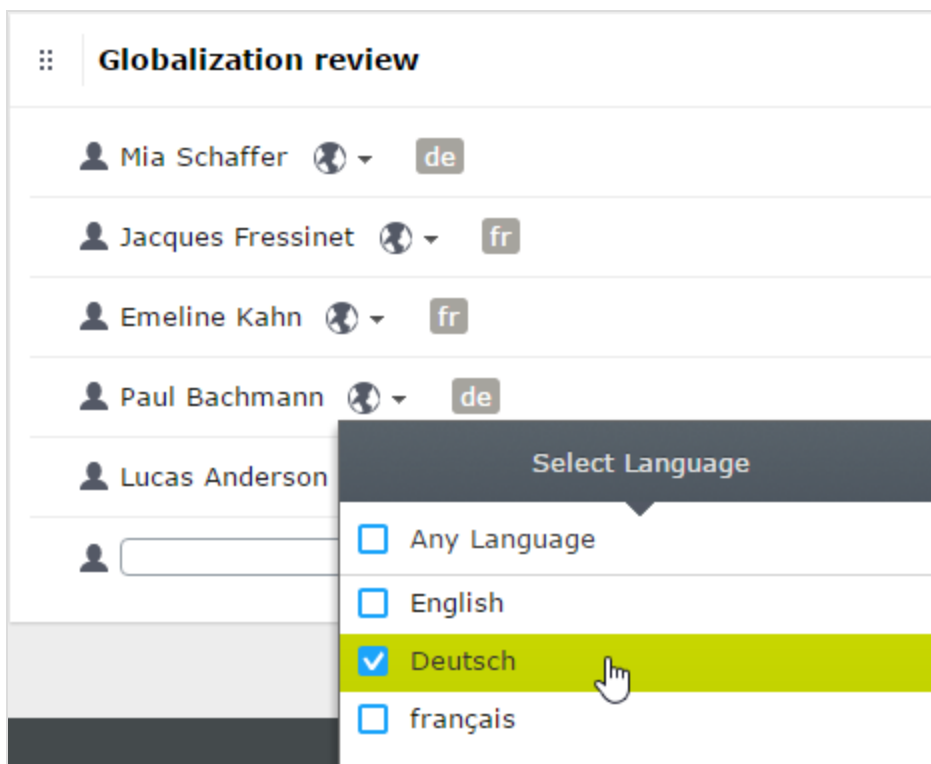
1. Open the approval sequence overview from a child item's context menu.
2. Depending on how you want to set up the item's approval sequence, select one of the three radio buttons:
 - » **Enabled.** This setting lets you edit and define the approval sequence any way you want. The approval sequence is not connected to the parent item's approval sequence. Set up the sequence in the same manner as described in the section above.
 - » **Inherited.** This setting locks the approval sequence for the current item and it gets whatever settings its parent has. If the parent item's approval sequence is changed, so is the approval sequence for the current item.
 - » **Disabled.** This setting disables the approval sequence for the item and it does not have to be approved.




Inherited is set by default, so if you do not define an approval sequence for an item's children, they automatically get the same approval sequence as the parent. If inheritance is set on children and the approval sequence is disabled on the parent item, the children inherits the disabled state. Local assets folders inherits the content approval sequence set on the associated page or block.

Setting up an approval sequence on a multiple languages website

1. Open the approval sequence overview from an item's context menu.
2. In the first step, type the first letter of the reviewer's name. Select the reviewer from the list of suggestions. You can also add a user group. Groups have a special group icon in the list of suggestions and you can also see how many users are included in the user group.
3. Click the  icon and select the languages the reviewer or group of reviewers can approve in the **Select Language** drop-down list. A reviewer or group of reviewers can approve content in one, several, or all languages.

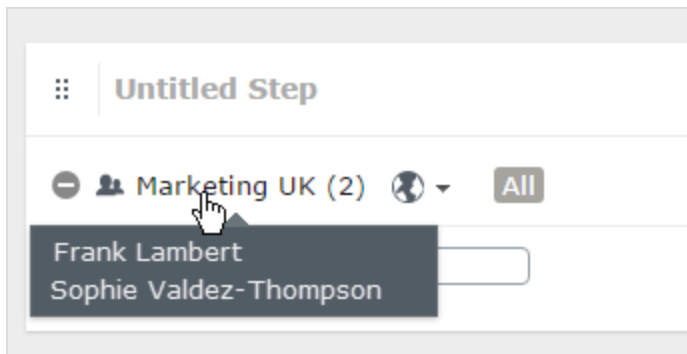


There is a difference between selecting **Any language** and selecting all languages one by one. If you select Any language, the reviewer can approve an item in any language it exists in, which also includes any new languages you may add in the future. If you select all available languages one by one, these are the only languages the reviewer can approve content in. If you add a new language in the future, the reviewer does not have the rights to approve in that language.

4. If you added an individual reviewer, add at least one more reviewer to the step. You should have at least two reviewers per language in each step, in case one of the reviewers is unable to review and approve.
5. Optional: Click **Untitled Step** to rename the step to something more descriptive, for example *Product marketing* or *ISO compliance review*.
6. Optional: To add more steps to the approval sequence, click the add button: . You can rearrange the steps by drag and drop.
7. Optional: If a reviewer should be required to enter a reason for approving or declining the content, select the **Approve** or **Decline** (or both) check boxes under **Require comment on**.
8. Click **Save**.

Editing an approval sequence

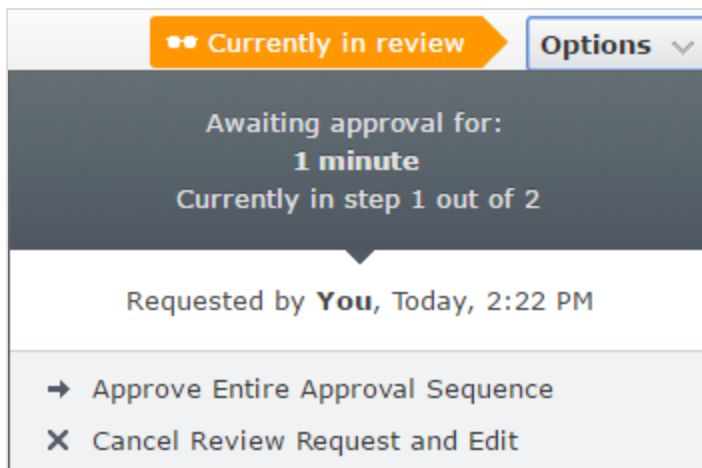
Open the approval sequence from the content item's context menu and make sure that the **Enabled** radio button is selected. Edit and save the approval sequence as described in [Setting up an approval sequence](#). You can rearrange the approval steps by drag and drop. Hover over a group name to see the users included in the group.



Note: If the selected content item has children that are set as **Inherited**, they will inherit all changes.

Approving and canceling approval sequences

As an administrator, you have the right to approve the entire approval sequence in one go, and to cancel a review request. You do that from the **Options** button. When you are approving an entire approval sequence, you are required to motivate why you are skipping the approval sequence and approving all steps.



Deleting an approval sequence

You cannot delete an approval sequence but you can disable it. Open the approval sequence from the item's context menu and select **Disabled**. The item can now be published immediately and does not have to be approved. If the selected content item has children that are set as **Inherited**, these children do not have to be approved.

Commenting on content approvals

As an administrator, you decide whether reviewers have to add a reason when they approve or decline content or not. An exception to this is when you approve an entire sequence, in which case you are required to add a comment.

The comments will be visible in the notification list in the user interface and in email notifications to the persons who started the content approval sequences. Comments are displayed in the project overview also, if the content item in review is associated with a project.

All comments are stored in the database as part of the [change log](#) and can be used later on for auditing purposes without using projects.

Using notifications

The defined reviewers can get notifications in the user interface and by email notifying them of the requested approvals. For the notifications in the user interface to be instantly displayed, your web server needs to have WebSocket support enabled. See [WebSocket support](#) on [Episerver World](#). For the email notifications to work, you need to configure your SMTP server with a *from* address. See [Configuring your email server](#) on [Episerver World](#).

CMS

Creating categories



This topic is intended for administrators and developers with administration access rights in Episerver.

Episerver CMS, a category classifies content, such as for building filtering features for search and navigation. You create categories in admin view, and apply them to content in edit view.



A category is a built-in property in Episerver CMS. You can apply categories to content, but you need to build the customized functionality for your website to display the resulting outcome, such as in a filtering. Also, do not confuse content categories with Commerce categories; see [Creating a catalog entry](#).

Adding a category

Add a new top-level category as follows:

1. From admin view > **Config** tab, select **Edit Categories**.

Categories ?

Define the categories used by your website. These categories will be available in the editorial interface for each page under the heading "Categories".

+ Add

Move Up	Move Down	Name	Display Name	Visible	Selectable	Add	Delete	Edit
	↓	Meet	Alloy Meet	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	+	×	
↑	↓	Plan	Alloy Plan	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	+	×	
↑		Track	Alloy Track	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	+	×	

2. Click **Add**. A new row is added to the table.
3. Specify a name in the **Name** field. This name is used in code when building category-based functionality.
4. Enter a name in the **Display name** field. This name is visible in edit view when a user selects categories. You can also language-encode this field.
5. Select **Visible** if you want this category to appear in the **Select Categories** dialog box in edit view.
6. Select **Selectable** if you want this category to be selectable in the **Select Categories** dialog box in edit view.

7. Use the up or down arrows if you want to move this category higher or lower in the list. This sequence determines the order in which categories appear in the **Select Categories** dialog box.
8. If you want to add a subcategory to a top-level, select the plus sign under **Add**. Add the subcategory in the same way as the top-level category.

Deleting or changing a category

Depending on how a category is used on your website, changing or deleting a category may cause things to stop working. Check with your developer before changing or deleting a category.

Editing frames and tabs


Frames

If you implemented frames on your website, you can use them for opening a link in a particular area of the window. This topic defined frames that are used by the system, and are accessible in the edit view as an option when an editor assigns a target frame for linking of content. Select the **Config** tab, and then **Edit Frames**.

Edit Frames

Define the frames your website is using. These will be available as "Target frame" options when creating links.

 Add


Frame Name	Description	Edit	Delete
_blank	Open the link in a new window		
_top	Open the link in the whole window		





















Tabs

You can make properties appear on different tabs by selecting the **Edit Tabs** function. You can add, edit and delete tabs. You can also define the display order for tabs, and apply access levels.

Edit Tabs ?

Define the tabs available under the Edit tab. When you create or edit a property, you can choose the tab under which you want to display the property.

 **Add**

Name	Display Name	Sort Index	Requires Access Level	From code	Edit	Delete
Default	Default	2	Read	Yes		
Contact	Contact	1	Read	Yes		
Metadata	Metadata	3	Read	Yes		
SiteSettings	SiteSettings	6	Read	Yes		
<input type="text" value="Information"/>	<input type="text" value="Content"/>	<input type="text" value="10"/>	<input type="text" value="Read"/>	<input type="checkbox"/>		
Scheduling		20	Read	No		
Advanced		30	Change	No		
Shortcut		40	Read	No		
Categories		50	Read	No		
DynamicBlocks		60	Read	No		

Adding and editing a tab

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

Permissions for functions

Setting of access rights from Permissions for Functions

Set the access rights for the following functions, which are found in the admin view under **Config > Security > Permissions for functions**.

- » **Detailed error messages for troubleshooting** provides selected groups or users access to detailed error messages whenever they encounter website failures.
- » **Allow the user to act as a web service user** lets a user call one of the web services provided by Episerver. This function is used only for system integration purposes.
- » **Allow users to move data/pages between page providers** lets selected users or groups move pages between page providers. This is used for websites with a custom page provider integrated with another system. Because data is deleted in the source provider, you may want to limit access to this function.

Adding/Changing permissions to a function for a group or user

1. In admin view, go to **Config > Security > Permissions for functions** and select **Edit** for the function you want to modify. Existing groups or users with access appear.
2. Select **Add Users/Groups** if you want to give users or groups access to this function. The groups and persons in the system appear in the window that opens.
3. Double-click the name to add the group or user.
4. Select **OK**. The group or user appears in the list with its check box selected.
5. Click **Save**.

Deleting permissions to a function for a group or user

1. In admin view, go to **Config > Security > Permissions for functions** and select **Edit** for the function you want to modify. Existing groups or users with access appear in a list.
2. Clear the check box of the group or user for which you want to remove access.
3. Click **Save**.

See also: [Access rights](#).

CMS

Tool settings

In admin view, under **Config > Tool Settings** you can perform miscellaneous functions for the integration and configuration of Episerver CMS.

- >> [Plug-in manager](#)
- >> [Rebuild name for web addresses](#)
- >> [Mirroring](#)
- >> [A/B Testing configuration](#)
- >> [Search configuration](#)

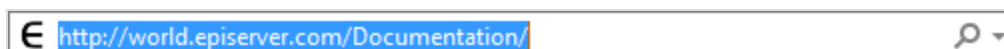
Plug-in manager

Many functions in Episerver CMS are created as plug-ins, which you can manage from the **Plug-in Manager**. You can activate and deactivate selected parts. If your organization invested in additional plug-ins, you can find them in the Plug-in Manager also. After choosing a plug-in, choose which parts of it are accessible in the **Overview** tab.

Plug-in Manager ?						
The list below displays components that have been registered as plug-ins in EPiServer CMS.						
<div> <div>Plug-ins</div> <div>Overview</div> </div>						
Name	Description	Version	Company	License	More Info	
EPiServer	Web Content Management System	9.5.1.0	EPiServer AB	System internal	http://www.episerver.com	
EPiServer Enterprise	Enterprise support for EPiServer CMS	9.5.1.0	Unknown	System internal	http://www.episerver.com	
EPiServer User Interface	Supporting logic for the built-in web forms and user controls	9.4.0.0	EPiServer AB	System internal	http://www.episerver.com	
EPiServer.Cms.Shell.UI	OnLine Center support for EPiServer CMS	9.4.0.0	EPiServer AB	System internal	http://www.episerver.com	
EPiServer CMS MVC Template package		9.4.0.0	EPiServer AB	Custom license		
EPiServer.LinkAnalyzer		9.5.1.0	Unknown	System internal	http://www.episerver.com	

Rebuild name for web addresses

Rebuild Name for Web Addresses changes addresses in the address field. When a visitor views a page on a website based on Episerver CMS, a path to the page appears in the address field. The address reflects the page's place in the website structure.



The names in the address field are created automatically from the name an editor specified for the page. If an editor changes the page name, the name in the address field does not change. You can manually change name in the address field by changing the **Name in URL** field on the **Settings** tab in edit view.

Some pages have no value in the field for names in web addresses, such as pages imported from other Episerver solutions. The **Rebuild Name for Web Addresses** function lets you create all web addresses for the website at the same time. You can also overwrite all existing addresses with new ones.



The **Rebuild Name for Web Addresses** function can affect links to the website. All internal links are updated automatically. However, if other websites link to a certain page, that link may be broken. The function can also affect visitors' browser favorites (bookmarks).

Creating a rebuilding name for web address

1. On the **Config** tab, select **Rebuild Name for Web Addresses**.

Status	Scanned pages	Fixed pages
Inactive	0	0

2. Select **Rebuild all page names in web addresses (overwriting existing links)**.
3. Click **Rebuild Links**.

Mirroring

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

Mirroring jobs are executed at time intervals that you set, as described in [Scheduled jobs](#).

To enable mirroring, a mirroring application must be installed and running. The application handles data transfer between websites and is run separately to the Episerver CMS source and target sites. You can configure source and target websites to use separate mirroring applications. You can also install and configure a single mirroring application. See [Episerver World](#) to configure and work with mirroring.

Mirroring Settings ?

Defines content that should be mirrored from EPiServer CMS to an external recipient.

Mirroring Settings

Messages

Monitoring

Name	<input type="text" value="NewMirroringChannel"/>
Parameters	<input type="text" value="EPiServer.MirroringService.MirroringTrans"/>
Use default URI	<input checked="" type="checkbox"/>
URI	<input type="text"/>
Start page	<input type="text" value="Customer Zone [48]"/> ...
Root page at destination	<input type="text" value="4"/>
	<input checked="" type="checkbox"/> Include the start page
Import as anonymous user	<input checked="" type="checkbox"/>
Import content as user	<input type="text"/>
Enable reporting	<input type="checkbox"/>
E-mail address	<input type="text"/>
Continue on error	<input checked="" type="checkbox"/>
Enabled	<input checked="" type="checkbox"/>
Enable validation	<input checked="" type="checkbox"/>

Delete
Save
Cancel
Reset Channel
Check System

Creating a channel

To set up mirroring between two websites, create channels in the admin view. Channels define the mirroring jobs from one Episerver CMS to another, or even to an external recipient.

Go to the source site in admin view > **Config** tab > **Tool Settings** > **Mirroring** to create a channel for mirroring as follows:

1. Click **Create** and enter the following information:

Setting	Description
Name	Type an unique name for the mirroring channel.
Parameters	<p>Optional field that can be used by providers. In this version, there is one parameter which can be handled by the provider:</p> <pre>Episerver.MirroringService.MirroringTransferProtocol. WCF.MirroringTransferClient.TransferAction.</pre> <p>The TransferAction has two options None and ForceCurrentVersion. By default, the value is None, which creates a new version for each published page on the target site. The ForceCurrentVersion option does not create a new version for each published page. Instead, it updates the page on the target site.</p>
Use default URI	Select to use the URI defined in the configuration file (web.config) for the mirroring application. When you select this option, the URI field is disabled.
URI	<p>Enter the URI to the destination mirroring application's target service, for example:</p> <pre>http://localhost/Mirroring/Mirroring/ MirroringTransferServer.svc.</pre> <p>The service for the default provider is:</p> <pre>MirroringTransferServer.svc.</pre>
Start page	Select the local root page on the source site to be mirrored.
Root page on destination	Select the page number on the target site where the pages are mirrored to.
Include start page	Sets whether the start page is mirrored or if only its children are mirrored.
Import as anonymous user	Sets whether an anonymous user does the export and import of pages and files when the mirroring job is run.
Import content as user	Sets whether an identified user does the export and import of pages and files when the mirroring job is run.
Enable reporting	Select to enable reporting for the mirroring job through email. When you

Setting	Description
	select this option, the E-mail address field becomes editable.
E-mail address	Enter the email address where the mirroring job report is sent.
Continue on Error	Select to enable a mirroring job to continue even there is problem on the importing side. If this option is not selected, a mirroring job terminates as soon as an error occurs.
Enabled	Select to enable the channel as active. If this option is not selected, nothing is mirrored for the channel.
Enable validation	Select to enable validation before items are mirrored. The mirroring job validates that all page types for pages being mirrored are present in the target site and that the page type has the same number and type of page properties as the source site. By default the mirroring job checks all necessary page types and page definitions, which is included in the start page and its descendants.

2. Click **Save**.
3. Continue with any of the following options:

Setting	Description
Reset Channel	Select to mirror everything again from the root page of the mirroring channel to the source site next time it is run. To reset the channel, select the name of the mirroring channel and click Continue with Reset .
Check System	To validate the created channel, click Check System . The result appears under the Messages tab. It checks both the source and target site to see if all necessary parameters are set up correctly; such as URI, Root page at destination, Mirroring Server binding, and Access to DataBase. See the section about synchronizing mirroring in the Developer Guide under <i>Deployment > Mirroring > Installing and Configuring mirroring</i> .
Messages	The result of a check system appears in the Messages tab. Click the arrow to view the result and other information regarding previous mirroring jobs that were run.
Monitoring	The status of a mirroring job appears in the Monitoring tab.

Setting	Description
Target Site Configuration	To use a site as a mirroring target, some configuration is required.
Mirror Pages to a Target Site	Create a target page in the editorial interface on the target site and create a page that acts as the root page for the mirrored pages. You can also use an existing page as the mirroring root page. To publish pages, the mirroring application needs to be installed and configuration needs to be implemented.
Mirroring in Other Formats	Partners and customers can create mirroring in formats other than Episerver CMS Import/Export format and plug them in using the provider model.

Configuring A/B Testing

You can configure the settings used when running A/B tests under **Admin > Config > Tool Settings > AB Testing Configuration**.

AB Testing Configuration

These settings are the default values used for when creating AB tests.

Test Duration:

Participation Percentage:

Automatically publish the winner of the test if the results are significant?

Confidence Level:

Setting	Description
Test Duration	Sets the default test duration in days. This can be changed in edit view when setting up an A/B test.
Participation Percentage	<p>Sets the default number of A/B test participants in percentage. This can be changed in edit view when setting up an A/B test.</p> <p>If the participation percentage is set to 20, 20 % of the site visitors participate in the A/B test. Half of the test participants are directed to the original version, and half to the variation version; the A/B test then measures which version has the</p>

Setting	Description
	<p>most conversions. Site visitors not participating in the test are directed to the original version.</p> <p>A higher number means that more visitors participate in the test and data is gathered more quickly, but it also means that a possibly less-effective page, from a conversion point of view, is exposed to more visitors.</p>
Automatically publish the winner of the test if the results are significant?	<p>Set this to True and an A/B winner is automatically published when the A/B test completes and the results are statistically significant according to the set confidence level. The winner is the version that has the higher conversion rate. If the conversion rates are equal, the editor must pick a winner manually. This setting affects all A/B tests on the site.</p> <p>The default setting is False.</p>
Confidence Level	<p>Sets the default confidence level of statistical significance you want from the A/B test results. This can be changed in edit view when setting up an A/B test.</p> <p>The confidence level determines how likely it is that a winning page is in fact better. That is, that the difference between the winning page and the challenger are not due to coincidence. For example, a 95% confidence level means that 95 identical test cases out of 100 would end with the same result. In other words, the higher the number, the more reliable test result.</p>

Search configuration

You can configure different **search providers** depending on the type of content on your website. A search provider searches across the website for pages, blocks, files, categories, forums or page types, or products on an e-commerce website. Search results are available when searching in the global Episerver menu in edit view.

Enabling search providers

You can decide which search providers you want to enable, and the order in which they appear in the search hit list. To access these settings, go to the admin view and select **Config > Search Configuration**.

- » **Blocks.** Search in blocks.
- » **Files.** Search in files.
- » **Pages.** Search in pages.
- » **Jump to.** Jump directly from the search hit list to **menu alternatives** matching your search criteria.

- » **Products.** Search in products if you have Episerver Commerce installed.
- » **Find files, blocks and pages** if you have Episerver Find installed.

You can drag and drop the search provider options to change the order between them. This controls the order in which the results are displayed in the hit list. Clearing a check box disables this search provider option.

Properties

Properties are central in Episerver CMS. Content type properties store and present data, such as page types and block types, and they are fields where editors enter information into a page type. A property can be the page name, an image placeholder, or the editor area, where you can add text. For example, the XHTML editor is a property of the type **XHTML String (>255)**, which results in an editorial area in the page type when used. For property content to be visible to visitors, link it to a [content type](#) with corresponding rendering.

Property types

You can define properties in code or from the administrative interface. For certain properties defined in code, you can create “non-breaking” changes in admin view to override these settings. If a property is defined in code and cannot be changed in admin view, information appears. If you make changes to a property defined in code, you can reset the changes to the values defined in code.

The following types of properties are used:

- » **Built-in properties** are set by the system and are automatically available for all pages and blocks regardless of type. For example, **PageName** (name of the web page) and **PageStartPublish** (start publish date for the page).
- » **User-defined properties** are added to the page or block type definition in code or from the admin view. Typical examples are **Heading** and **MainBody**.

You can locate property settings under the **Config** tab in the **Property Configuration** section, and under the **Content Type** tab when you work with content types.

Editing and adding properties on content types

A common example for editing properties is to define toolbar buttons for the [TinyMCE rich-text editor](#). You normally define properties in code but occasionally add them in admin view, because properties added from there are not rendered.

When you edit and add properties, the following tabs are available:

- » **Common Settings** is where you edit a property's common settings.
- » **Custom Settings** depend on the property data type being editing.

Editing a property

The upper **General** section of the **Common Settings** tab contains information about a selected property. If a property is **defined in code**, information about it appears, but you cannot change values

such as property type and presentation control. You can change other settings, such as making a property mandatory or searchable. The lower **User Interface** part contains settings related to the property display in edit view.

See **Adding a Property** below for information about available settings for properties.

Edit Property

Common Settings
Custom Settings

General

From code: Yes
Type: XHTML string (>255)
Name: MainBody
Presentation control: Use configuration settings
Default value:
☒ No default value
☐ Inherits value
☐ Value must be entered
☒ Searchable property
☒ Unique value per language

User Interface

☒ Display in edit view
Field name: MainBody
Help text:
Tab: Content
Sort index: 310

Save
Revert to Default
Cancel

Adding a property

1. In admin view, from the **Content Type** tab, select a page type and click **Add Property**.
2. Fill in the fields.

Field	Description
Type	Select a property type. You can choose from several property types: integer, string, page, date, and so on. You can also create a property type.
Name	Name the property. This is used when programming and making language settings.
Presentation control	Use of multiple editors is supported but the TinyMCE editor is used most often, and the Presentation control drop-down list appears dimmed. If your website is configured to allow multiple editors and you chose the property type XHTML String (>255) , the Presentation control drop-down list is enabled, and you can select the XHTML editor to use.
Default value	Select a value for the property. This is the default value on all pages where it is used. You can specify a default value for both customized and built-in properties.
Value must be entered	Select the check box to make it mandatory to enter a value for the property before saving. The setting is configured per property and content type.
Searchable property	Clear the check box to exclude a property from search. It might be beneficial to avoid undesired property values the search index. By default, all properties are searchable.
Unique value per language	Select whether the property is unique for a certain language. This is needed only if the website supports globalization.
Display in edit view	Determine if the property is visible in edit view. By default, all properties are visible in the editorial interface. The setting is configured per property and page type.
Field name	Specify a heading for the property. This text appears for the editor when editing the page in All Properties editing view unless a translation of it was added language resources.
Help text	Specify a help text to help the editor understand how to use this property, and appears in All Properties editing view when hovering over the property name.
Tab	Select the tab on which the property is to be displayed in the Tab drop-down list.

Field	Description
Sort index	Select a relative number to sort this property among other properties.

3. Click **Save**.

The **Custom Settings** tab displays custom information for the selected property type. You define available buttons in the toolbar of the TinyMCE rich-text editor, which is based on the property type **XHTML string (>255)**.

Defining language-specific properties

When working with globalization, you define in every template which fields vary depending upon the language. To do this, set the property for that field to “locked” or “open” for globalization using the **Unique value per language** setting in admin view.

Properties that have unique value per language are editable in all enabled languages on the website, which is normally the case. You can edit only properties that do not have language-specific values in the language in which the page was created (the original page language). These properties are disabled in edit view with an icon indicating the original language.



Imagine the property defining the sort order field is not set as a unique value per language (that is, the **Unique value per language** check box is cleared). When creating a new page, you can set sort order in the original page language. But if you create a version of the page in another language, the sort order field is not editable. As a result, the sort order is the same for all enabled languages. If you want to change the sort order for each language, select the **Unique value per language** check box.



If a property is changed to not having a unique value, all existing values for that property are deleted. So if the property for the editor area is changed to not have a unique language, all text entered in the editor area for all languages on the website are permanently deleted.

Setting a property to be language-specific

1. On the **Content Type** tab, select the page type that contains the property to be set.

Edit Property

Common Settings | Custom Settings

General

From code: Yes

Type: XHTML string (>255)

Name: MainBody

Presentation control: Use configuration settings

Default value:

☒ No default value

☐ Inherits value

☐ Value must be entered

☒ Searchable property

☒ Unique value per language

User Interface

☒ Display in edit view

Field name: MainBody

Help text:

Tab: Content

Sort index: 310

Save Revert to Default Cancel

2. Click the name of the property that you want to change.
3. Select the **Unique value per language** option.
4. Save your changes.

Organizing properties in content

You can alter the order in which properties are displayed to editors in a page or block type. You can also move properties between tabs in a page type. These changes are done for each page type in admin view.

Changing the order of properties

Follow these steps to change the order in which properties appear in the All Properties editing view. For example, you can display important properties at the top of the page.

1. Select the page or block type on the **Page Type** or **Block Type** tab.

[AlloyTech] Standard page ?

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

Information

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

[Settings](#)

[+ Add Property](#)

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

2. Click an arrow to move a property, or drag and drop the property to a desired order.

Placing a property on a tab

1. Select the page type on the **Content Type** tab.
2. Click the name of the property that you wish to modify.
3. In the **Tab** drop-down list, select the tab on which the relevant property will be placed.
4. Click **Save**.

Configuring customized property settings

On the **Config** tab under **Property Configuration > Edit Custom Property Types**, you can configure custom property types.

Priorities and configuration

The property settings have the following priority:

1. A specific setting for a property defined in admin view. This can be a custom settings for this property or pointing to a specific global setting.
2. A specific setting for a property defined for the model in code.
3. A global setting defined in admin marked as the “Default” settings for the property type.
4. A global setting defined in code.

You can create a property, name it, and give it a data type and other settings.

Creating custom property types

The list of available custom property types done by a developer has the following columns:

- » **Name.** The name of the content type created by a developer, of which some are selectable in the editorial interface.
- » **Base type.** Shows the built-in types that can be extended by a developer.
- » **Class name.** Shows the full name of the class. The class is defined in the assembly.
- » **Assembly name.** Shows the class reference. A blank column indicates a built-in property.

A developer can create **property data types** by inheriting from the existing available ones.

Data type name	Base type	Description
Boolean	Selected/not selected	True or false.
Number	Integer	An integer.
FloatNumber	Floating point number	Number with decimals, for example, 3.14.
PageType	Page Type	Episerver CMS page type defined in admin view.
PageReference	Page	Link to an Episerver page in the current site.
Date	Date/Time	Date and time.
String	String (<=255)	Short text, fewer than 256 characters in length.
LongString	Long String (>255)	Used for text that can exceed 255 characters in length, for example the main editor area in edit view.
Category	Category selection	List of categories.

Data type name	Base type	Description
LinkCollection	Link collection	A collection of links that can be added and edited in edit view.



Default values for properties are not defined in code.

CMS

Configuring the rich-text editor

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

Properties based on the **XHTML String (>255)** property type result in a rich-text HTML editor, which you can configure by choosing which buttons are available. In a standard installation of Episerver CMS, the editor is a customized version of the open source rich-text editor **TinyMCE**. TinyMCE has many functions, is easy for developers to customize, and works with all browsers supported by Episerver CMS.

This description applies to a standard installation of Episerver CMS, with a selection of functions being available. You can incorporate additional functions and customizations into the editor from admin view. See [Episerver World](#) and the official [TinyMCE website](#).

You can adapt the rich-text editor to suit different groups of editors through the availability of different buttons. You can also change the size of the rich-text editor dialog. To change these settings, first configure the property to use property **XHTML String (>255)** type. This enables the fields in the **Custom Settings** tab.

You use two kinds of settings to change the editor's layout and buttons: **global settings** and **custom settings**. You configure the layout of the editor toolbar the same way regardless of the type of setting.



You can watch the following demonstration video, [Modifying the TinyMCE editor options](#). (6:39 minutes)

Changing the layout of the editor

1. Enter the required width and height of the editor (in pixels) in the **Height** and **Width** fields.
2. If needed, change the path to the cascading style sheet (CSS) that is used in the editor with the **Content CSS Path** field.
3. Drag and drop icons that you want available from the editor toolbar designer to and from the **Inactive tools** section.

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

Edit Property
?

Common Settings
Custom Settings

XHTML string (>255)

This class does not have any custom settings.


TinyMCE Editor







☐ Use default settings
☐ Use global settings ▼ [Manage global settings](#)
☒ Use custom settings

Settings

Width
Height
Content CSS Path

Editor Toolbar



B *I*   Styles ▼    

Add Row Remove Last Row Clear Rows

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


Inactive tools
Plugins without a button


- ☒ Change image dialog to Advanced image dialog
- ☐ Change list buttons to advanced list buttons
- ☒ Use EPiServer CMS file selection dialog [EPiServer]
- ☐ Wordcount
- ☐ Change link dialog to Advanced link dialog

Always enabled plugins

- EPiServer Window Manager for dialogs
- Enable/disable editor [EPiServer]
- Remove accesskey attributes for editor [EPiServer]
- Removal of toolbar and content size dependency [EPiServer]
- Enhanced visual aid [EPiServer]
- Enable drag and drop from file manager [EPiServer]
- Checks if changes have been made in the Editor when leaving page [EPiServer]
- Search/replace modified to function with Dynamic Content [EPiServer]
- Style matcher improvement for the Editor [EPiServer]
- Add p tag last in the Editor to enable the cursor to be set at the end of the document [EPiServer]

Save Cancel

Media 

Miscellaneous 





Clipboard 

Table  All Table Tools

Character 

Paragraph 

Enabling plug-ins

Some editor plug-ins are enabled in a standard installation of Episerver CMS. These are configured in the Plug-in Manager on the **Config** tab in admin view.

- » **Change list buttons to advanced list buttons** enables a drop-down list with advanced types for nested lists, such as square, lower alpha, and lower roman.
- » **Change image dialog to Advanced image dialog** enables an advanced Add/Edit Image dialog box. Select this check box to configure advanced properties for your images.
- » **Word count** enables word count functionality. Select this option to add a **Words** field to the bottom right of the editor. This displays the number of words included in the editor area.

Configuring global and custom settings

Global settings let you change the layout and the buttons in the rich-text editor toolbar for a property. You can use global settings on all page types as a default, or on only one page type. You can have as many global settings as you like on your website to create an editor suitable for all editors working with the website. You can also apply custom changes for a specific page type.

Configuring global settings for the XHTML String (>255) property

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

1. On the **Page Type** tab, select **Edit Custom Property Types** and click **Add Setting**.
2. Enter a descriptive name for the global setting.
3. Change the layout of the rich-text editor, configure the plug-ins, and click **Save**. The global setting appears in a list.



Click **Set as Default** for one setting to use it for all the editor toolbars on the website, unless another setting is chosen for the property in a certain page type. If you do not configure a global setting as default, the properties use the standard toolbar set at installation.

Configuring global settings for a property on a page type

You can configure a global setting for a specific property on a specific page type.

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

Configuring custom settings

Use custom settings to change the layout and the buttons in the rich-text editor toolbar **for this property on this page type only**.

Configure a custom setting as follows:

1. On the **Custom Settings** tab, select the **Use custom settings** radio button.
2. Change the layout of the rich-text editor, configure the plug-ins and click **Save**.

Deleting a global setting

To delete a global setting, open the setting and click **Delete**.

Content types

Content in Episerver can be page and block types, folders, or media files such as images and documents. Content can also be products in a product catalog in Episerver Commerce.

Content types and properties

Page and block types contain the [properties](#) where editors enter information, such as a link to an image on a web page.

[AlloyTech] Standard page?

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

Information

From code

Yes

Name

StandardPage

Display name

[AlloyTech] Standard page

Settings

+

Add Property

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

For a content type, you define a set of properties that can hold information, such as a link to an image, a web page, or editorial text. A typical website has a set of content types that match the identified functions needed on that website.

The content type is the foundation from which you create one or many page or block instances. To display content to visitors, the page or block type and its properties need to be mapped to corresponding rendering.

The content concept in Episerver is based on inheritance from a “generic” content type, which then is used to create specific content types, such as a page type or a media folder. Using this feature, developers can create custom content types easily when they set up new websites.

- » You can define page types in code or from the admin view. However, you can define block types only in code.
- » For page types defined in code and for all block types, you can define “non-breaking changes” of properties in admin view.
- » You are notified if you cannot change the settings defined in code in admin view.
- » If you make changes to a page type defined in code, you can reset the changes to the original values defined in code.

Page types



Be careful when you alter page type settings because changes may cause the website to stop working. Although you can create page types in admin view, you should create them from code.

Editing a page type

Edit "Standard Page" ?

Edit the basic information about the page type.

Information

Default Values

Available Page Types

General

From code

Yes

Name

StandardPage

Display name

Description

Sort index

0

☒ Available in edit view

Display Template

Web Form template path

☒

Web Form template

☐

MVC template

☐

Advanced

Guid

9ccc8a41-5c8c-4be0-8e73-520ff3de8267

Class name

AlloyTemplates.Models.Pages.StandardPage, AlloyMvcTemplates, Version=9.4.0.0, Culture=neutral, PublicKeyToken=null

Access level

Create

Everyone

☒

Add Users/Groups

Save

Revert to Default

Cancel

To edit settings for an existing page type, open the page type on the **Page Type** tab, click **Settings**, change the settings, and click **Save**.

Because you can identify page types and their properties in code or from the admin view, you can change some settings from admin view. If a page type is created from code, this is shown on the page type information page under **General**.



You cannot delete certain page types defined in code. These are typically page types upon which other page types are based, such as the standard or default page and the start page.

Using the Access level area, you can define which users or user groups will have access to the page type.



You can watch the following demonstration video, [Making a page type available for some users but not for others](#). (3:06 minutes)

Creating a page type from admin view

1. On the **Page Type** tab, select **Create New Page Type**.
2. Set values in the **Information** tab.

Field	Description
Name	Enter the name of the page type.
Display name	Enter the name to be displayed in the list of available page types.
Description	The text describing the page type, appears in the list of available page types.
Sort index	Determines the sorting (ascending sort order) in the list of available page types in edit view; default is 100.
Available in edit view	Makes the page type available for selection when creating new pages in the editorial interface. You should hide page types that are rarely used by editors, such as the start page type. You can make these available when needed, and then hide them again.
Display Template	<p>Select one of the following templates to be used for the page type:</p> <ul style="list-style-type: none"> » Web Form template path. Enter a path to the aspx page template file that displays the content of the page. » Web form template. Select a Web Forms template that the page type is associated with. If your developer created several templates using type classes, these appear in the list. » MVC template. Select a MVC template with which the page type is associated. If your developer created several templates using type

Field	Description
	classes, they appear in the list.
Registered template	Select to use registered page templates for displaying content. The registered page templates are available for selection in the drop-down list. You then can associate a page type with predefined page templates to display the same content using different channels.
Advanced information	Displays information about the GUID, class name and assembly name for the page type.
Access level	<p>Determines the users and user groups for which the page type is available when creating new pages. The default setting is Everyone (available to all users and groups). See Access rights</p> <p>Do the following to limit access rights for a page type:</p> <ol style="list-style-type: none"> 1. Clear the Create check box to remove Everyone from the access level setting. 2. Click Add users/Groups and select the relevant users or groups. 3. Make sure that the Create check box is selected for the desired users and groups.

3. Set values on the **Default Values** tab.

You can set default values for some of the built-in properties in Episerver CMS from admin view. You can also specify default values for the properties from code, but these are not visible in the admin view.

Edit "Standard Page"

Edit the basic information about the page type.

Information

Default Values

Available Page Types

☒ Use adjusted default settings for pages using this page type

Start Publish Date

1

minute

Set "Start publish date" relative to when the page has been created

Stop Publish Date

minute

Set "Stop publish date" relative to when the page has been created

☒ Display in navigation

Sort index

Sort subpages

According to creation date (latest first)

Archive to

...

Target Frame

Open the link in a new window

Save

Revert to Default

Cancel

Property	Description
Start Publish Date	Select the Use adjusted default settings... and the value in time when the system should publish the page after it is created. Mostly used for news pages that are available on the website for a short time.
Stop Publish Date	Select the Use adjusted default settings... and the value in time when the system should stop the page from being published. Mostly used for news pages that are available on the website for a short time.
Display in navigation	Select this option if the page type, for example, a news item page that should never be displayed in menus for navigation. This is done by clearing the Display in navigation property, which is then the default value for this page type.
Sort index	
Sort subpages	Select how you want the pages to be sorted, according to creation date or other.
Archive to	Browse the path to where you want the pages archived. Then, you can run a scheduled job to clean up archived pages as described in Scheduled jobs .
Target frame	Select if the page should be opened in a new window or in the same window.

4. Set values on the **Available Page Types** tab.

When creating new pages, limit the available page types in the page type list to make it easier for editors to choose the correct page type. For example, for a *News List* parent page, you can specify that the only available page type is *News Item*.

Edit "Standard Page"

Edit the basic information about the page type.

Information | **Default Values** | **Available Page Types**

☒ Use Default Settings
☐ All
☐ None
☐ Selected

	Name	Description
<input checked="" type="checkbox"/>	[Specialized] Contact	
<input checked="" type="checkbox"/>	[Specialized] Container Page	
<input checked="" type="checkbox"/>	[News] Article	
<input checked="" type="checkbox"/>	[Default] Standard Page	
<input checked="" type="checkbox"/>	[Specialized] Search Page	
<input checked="" type="checkbox"/>	[Specialized] Start Page	
<input checked="" type="checkbox"/>	[Products] Product	
<input checked="" type="checkbox"/>	[Specialized] Landing Page	
<input checked="" type="checkbox"/>	[Default] News Page	
<input checked="" type="checkbox"/>	Root Page	Used as root/welcome page
<input checked="" type="checkbox"/>	Trash	Used as recycle bin for the website

Save Revert to Default Cancel

Option	Description
Use Default Settings	Revert to default settings as defined in code for this page type.
All	Create pages based on all page types available in edit view.
None	Cannot create child pages for this page type.
Selected	Manually select the available page types.

5. Click **Save**.

Copying an existing page type

When you copy a page type, its properties are copied also. You can then edit the information for the page type and its properties. Copy a page type as follows:

1. Select **Copy Page Type** in the **Page Type** tab in admin view.
2. Select the page type that you want to copy from the drop-down list and click **Copy**. A window appears containing the exact same properties.
3. Edit the page type information to suit your requirements and click **Save**.



Copied page types are untyped and you need to add the path to the display template, otherwise pages based on the page type will not have a preview.

Block types

Block types are similar to page types, and you can modify some settings from admin view.

[AlloyTech] Text block

Simple block that displays a main heading and a XHTML text.

Information

Name

TextBlock

Display name

Settings

Add Property

	Name	Field name	Type	Required	Localized	Searchable	Tab	From code
↓	Heading	Heading	String (<= 255)		Yes	Yes	Content	Yes
↑	Text	Text	XHTML string (>255)		Yes	Yes	Content	Yes

Edit the settings for an existing block type as follows:

1. Select the block type on the **Block Type** tab and click **Settings**.
2. Change one or several of the settings as described for [Creating a page type from admin view](#).
3. Click **Save**, (or **Revert to Default** if you want to restore your settings).

Other content types

By default, there are generic content types for other types of content such as folders and media files. Based on these, developers can create specific content types. You can have a specific folder or media file content type, where you can add properties such as *Copyright* or *Photographer*.

CMS

Converting pages

You can convert pages from one page type to another. This is useful if you want to move information from an old to a new page type or created a page based on the wrong page type.

Each page type contains properties. When you convert a page, you map the properties of the old page type to corresponding properties of the new one.



All page versions are converted. Therefore, ensure that no users are working with the page types to be converted.

A page property in the new page type can be mapped only to one old page property.

1. Select **Convert Pages** from the **Content Types** tab in admin view.

Convert Pages ?

Converts one or several pages in the tree structure from one page type to another page type.
Note! This operation is irreversible and content may be permanently removed.

Select pages to convert

☒ Convert the selected page and all subpages (of the selected page type)

Convert from Page Type	Convert to Page Type
<input type="text" value="Standard Page"/>	<input type="text" value="Contact"/>

Convert from Property	Convert to Property
MetaTitle	<input type="text" value="MetaTitle"/>
PageImage	<input type="text" value="PageImage"/>
MetaKeywords	<input type="text" value="MetaKeywords"/>
TeaserText	<input type="text" value="TeaserText"/>
HideSiteHeader	<input type="text" value="HideSiteHeader"/>
MetaDescription	<input type="text" value="MetaDescription"/>
HideSiteFooter	<input type="text" value="HideSiteFooter"/>
MainBody	<input type="text" value="Remove property permanently"/>
MainContentArea	<input type="text" value="Remove property permanently"/>
DisableIndexing	<input type="text" value="DisableIndexing"/>

2. Select a page in the **Select pages to convert** field.
3. Select the **Convert the selected page and all subpages (of the selected page type)** check box if you want all the subpages to be included in the conversion.
4. Select the page type that you want to convert **from** in the **Convert from Page Type** list. The list of page properties included in that page type updates in the **Convert from Property** list.
5. Select the page type that you want to convert **to** in the **Convert to Page Type** list. The list of page properties included in that page type updates in the **Convert to Property** list.
6. Map each page property to a corresponding property in the page type to which you want to convert.
7. Click **Convert**.

8. To test the conversion, click **Test Conversion and Show Log**, which displays a detailed log of converted pages and page properties.



Selecting **Remove property permanently** deletes the property, which may damage existing content that uses the property.

Visitor groups

Personalization in Episerver lets you target website content to selected visitor groups. The personalization feature is based on customized visitor groups that you create based on a set of **personalization criteria**. Episerver provides a set of basic criteria such as geographic location, number of visits, and referring search phrase. You can also develop customized criteria.

Built-in visitor group criteria

The Episerver platform comes with the following built-in visitor group criteria.

Visitor group criteria	Description
Site Criteria	<ul style="list-style-type: none"> » Number of Visits. Matches the number of times the visitor has visited the website. You can specify Less than, Equal, or More than, within a number of days (weeks, months or years), or since a date, or in total. For example, <i>Less than 1 [visit] within 10 days</i>. » User Profile. Matches a value stored in a user's profile. You can specify Last Name, First name, Company, Address, Title, or email address. Each item can be equal to, contained in, start with or end with the specified value. For example, <i>Company Equals ExampleCo</i>. See Example: Site criteria and points example. » Visited Category. Select one of the website's page categories. You can also select a number of pages that use the category and were visited. The visitor must have visited the specified number of pages to which the category is applied. For example, <i>Category X viewed at least 3 pages out of a total of 6</i>. » Visited Page. Select one site page. The visitor must have visited that page during the current session.
Time and Place Criteria	<ul style="list-style-type: none"> » Geographic Coordinate. Uses the visitor's approximate location in a geolocation database (based on visitor IP address). Drag the marker to the map (Google maps), and select a radius around that point to indicate the visitor's proximity to the location. See Example: Geographic coordinate. » Geographic Location. Matches the visitor to a specific continent, country, and region. For example, <i>Continent: Europe, Country: Norway, Region: Oslo</i>. You can also specify a wild card for country and region. For example, Country N* in Europe yields

Visitor group criteria	Description
	<p>Netherlands and Norway. See Example: Geographic location.</p> <p>» Time of Day. Matches the visitor's time period with the start time, end time (15-minute intervals), and days you specify. For example, <i>From 2:00 PM to 4:15 PM on Monday, Tuesday, and Friday</i>.</p>
URL Criteria	<p>» Landing URL. Matches the URL with which the visitor enters the site. You can decide if the landing URL is equal, starts with, or ends with the with a specified value. For example, <i>contains www.example</i> to match <i>www.example.com</i>, <i>www.exampleURL.com</i> and so on.</p> <p>» Referrer. Matches the Host name or URL of the referred page that was clicked before entering the site, such as a search engine result page. You can decide if the referrer criteria matches on equal, contain, start with, or end with a specified value for the whole or parts of the Host name or URL. See Example: Referrer.</p> <p>» Search Keyword. Stores the URL of the referred page that was clicked before entering the site, such as the URL of a search engine result page. Your partner developer can define this criteria to specify the search word to match against the URL by a regular expression. The regular expression finds search words in the URL. Note: This criterion is not compatible with Google due to privacy restrictions for Google searches.</p>
Visitor Groups	<p>Visitor Group Membership. Select members from existing visitor groups. For example, <i>Member of Job Applicants</i>, or <i>Not a Member of Start Customer Club</i>.</p>
Episerver Forms (Episerver Forms is an add-on and must be installed separately.)	<p>» Submitted Form. Matches when a visitor submits (or does not submit) a particular form that you select from a drop-down menu. For example, <i>Has Submitted Job Application</i>. See Example: Form and form values.</p> <p>» Submitted Form Value. Matches when a visitor submit a particular form value. See Example: Form and form values.</p>

Managing visitor groups

Visitor groups are managed from the **Visitor Group** option in the global menu. When creating a new visitor group, you select one or more criteria and define appropriate settings. Those criteria are used to determine whether a user visiting the website is a part of that visitor group.



You can make the editor a member of **VisitorGroupAdmins**. This group provides access only to the **Visitor Groups** option in the global menu.

Creating a visitor group

1. From the global menu, select **CMS > Visitor Groups**.
2. Click **Create**.

3. In the **Criteria** section, click to add criteria for the visitor group as follows:
 - a. In the **Match** drop-down list, select the criteria to match **All**, **Any** or **Point**. What you select affects all criteria for the visitor group. Using points is a way to set a value for what a desired action on the website is worth.
 - b. Drag the criteria from the pane on the right and drop it into the **Drop new criterion here** area.
4. Make the settings for the criteria, see examples described in [Examples of creating visitor groups](#).
5. In **Name**, name the visitor group you are creating. This name appears in the personalized content box when you select the content on a page.
6. In **Notes**, type a descriptive text about the visitor group you have created, for example, its purpose. This description appears as a tooltip when the editor is adding a visitor group to the content on a page.

7. In **Security Role**, select the check box if you want this visitor group to be available when setting access rights for pages and files in admin view.



Visitor groups only have read access.

8. In **Statistics**, keep the check box selected to enable statistics for the visitor group (this check box is selected by default).
9. Click **Save**.

Editing a visitor group

1. From the global menu, select **CMS > Visitor Groups**.

Name	Notes	Action
Alloy Track for free	Visitor who have visited pages that are categorized as Alloy Track more than 2 times.	
French visitors	Visitors from any part of France.	
Visitors from London	Visitors from Greater London.	

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



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

Copying a visitor group

1. From the global menu, select **CMS > Visitor Groups**.
2. Click **Copy** for the visitor group you want to copy. The new copy has the same name as the original but with the extension “- Copy”.
3. Rename and change criteria for the new visitor group you have copied.

Deleting a visitor group

1. From the global menu, select **CMS > Visitor Groups**.
2. Click **Delete** for the visitor group you want to delete.

3. Confirm the deletion.

Viewing and clearing statistics

The visitor group statistics appear as a gadget on the dashboard. Clear the statistics from the database as follows:

1. From the , select **CMS > Visitor Groups**.
2. Click **Clear statistics** .
3. Confirm the deletion.



The **Clear statistics** button permanently deletes statistics from the database. This action cannot be undone.

Examples of creating visitor groups

EXAMPLE: Site criteria and points

By using **Points**, you can set a value for how much an action is worth, for example, a visited campaign page. In this example, a visitor who visits the page on a certain date matches the visitor group criteria.

Edit Visitor Group ?

Adapt content on your website by first creating visitor groups and then using the groups to target the content on pages.

Criteria

Match **Points** ▼

Drop new criterion here

Number of Visits

More than Since p ☐ Required

Geographic Location

Continent: Country: p ☐ Required

Region:

Threshold

Other Information

Name

Notes

This visitor group lets editors present relevant content to a particular geographical area. The group can be as broad as "by continent," can be narrowed to a particular country, and even to a specific region, state, or province.

In this group, content is targeted at website visitors from Sweden.

Security role ☒ Make this visitor group available when setting access rights for pages and files

Statistics ☒ Enable statistics for this visitor group

EPiServer forms

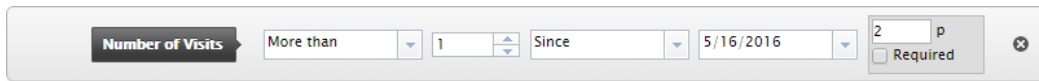
Site Criteria

Time and Place Criteria

URL Criteria

Visitor Groups

1. In the **Match** drop-down list, select the criteria to match **Point**.
2. Drag and drop the **Visited Page** criterion, and select page. Use drag-and-drop of the criteria again to add several pages.
3. Drag and drop the **Number of Visits** criterion, and select **More than > 1 > Since [date]**. (To create a visitor group for visitors who have never visited the page, select **Less than > 1 > Since [date]**.)

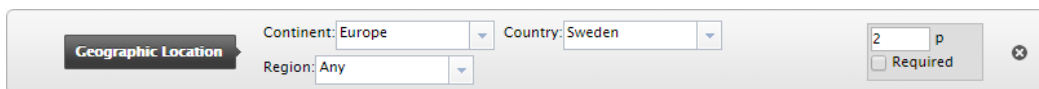


4. Enter the number of points each criterion is worth, and select whether or not the criterion is required.
5. Select **Threshold** for the criteria you added in your visitor group. For example, the visitor must fulfill 1 of 3 criteria to be included in the visitor group.
6. Click **Save**.

EXAMPLE: Geographic location

You can direct content to visitors from a specific country and specific days. For example, people from Sweden visiting your website on weekdays. You can show these visitors a clickable banner to sign up for a conference.

1. Drag and drop the **Geographic Location** criteria, and select **Continent**, **Country** and/or **Region**. Use drag-and-drop of the criteria again to add several countries.



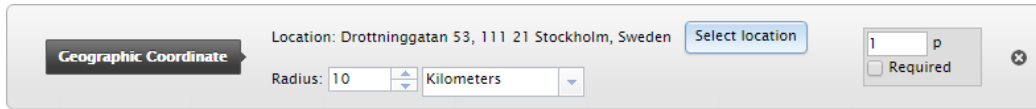
2. Drag and drop the **Time of Day** criteria, and select **[weekday]**. You can also select the personalization to start and end at a specific time.
3. Click **Save**.

EXAMPLE: Geographic coordinate

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

1. Drag and drop the **Geographic Coordinate** criteria, and click **Select Location**.
2. Click **Select location** to display a map that you click to set a location. You can zoom in the map for more precise locations.

3. Select the **Radius [number of kilometers or miles]**.



The interface shows a configuration box for 'Geographic Coordinate'. It includes a 'Location' field with the text 'Drottninggatan 53, 111 21 Stockholm, Sweden' and a 'Select location' button. Below this is a 'Radius' field with the value '10' and a unit dropdown menu currently set to 'Kilometers'. To the right, there is a 'Required' checkbox which is unchecked, and a close button (X).

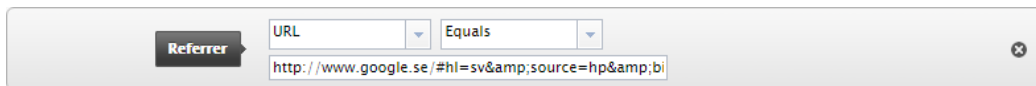
4. Click **Save**.

EXAMPLE: Referrer

The HTTP Referrer is based on pages, such as those used in a campaign. For example, you can target content to visitors who

- >> search for “episerver and cms” on Google.com
- >> from the search result page, click the Episerver landing page link

1. Drag and drop the **Referrer** criteria, and select **URL > Equals** > the URL of the search engine result page, for example,
<http://www.google.se/#hl=sv&source=hp&biw=1338&bih=790&q=episerver+cms>.



The interface shows a configuration box for 'Referrer'. It has two dropdown menus: the first is set to 'URL' and the second is set to 'Equals'. Below these is a text field containing the URL 'http://www.google.se/#hl=sv&source=hp&biw=1338&bih=790&q=episerver+cms'. There is a close button (X) on the right.

2. You can also add the **Geographic Location** to select a country.
3. Click **Save**.

EXAMPLE: Form and form values



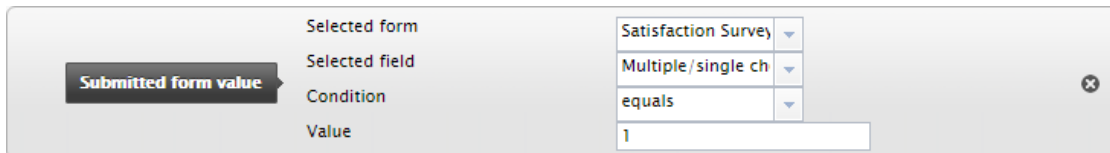
You need to have Episerver Forms installed to create visitor groups based on form submissions.

You can base a visitor group on whether the visitor has (or has not) submitted a particular form or form value. For example, you can target content to visitors who submit a Job Application form:



The interface shows a configuration box for 'Submitted form'. It has two dropdown menus: 'Submission status' is set to 'Has submitted' and 'Selected form' is set to 'Job Application'. There is a close button (X) on the right.

You can target content to visitors that give you a low rating on a Satisfaction Survey.



The interface shows a configuration box for 'Submitted form value'. It has four dropdown menus: 'Selected form' is set to 'Satisfaction Survey', 'Selected field' is set to 'Multiple/single ch', 'Condition' is set to 'equals', and 'Value' is set to '1'. There is a close button (X) on the right.

Additional visitor group criteria

You can extend the built-in visitor group criteria as follows:

Commerce

Episerver Commerce criteria

Visitor group criteria specific for e-commerce, such as customer properties, markets, and order frequency criteria. See Personalization for Commerce.

Add-ons

Episerver Visitor Group Criteria Pack

- » **Display Channel** matches the visitor's current display channel when visiting the website, such as distinguishing between web and mobile visitors.
- » **IP Range** matches the IP range equal to, below, or above a defined IP number the visitor used when visiting the website.
- » **OS & Browser** matches the operating system and browser the visitor used when visiting the website.
- » **Role** matches the access roles the visitor had when visiting the website. You can include roles by using the **In role** condition, or exclude roles by **Not in role**.

Add-ons

Episerver Marketing Automation

Visitor group criteria specifically designed for marketing automation.

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