EPiServer 7.5 CMS

User Guide for Administrators

EPiSERVER

User Guide for Administrators – EPiServer 7.5 CMS
Revision A, 2013

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Introduction

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

About this documentation

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

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

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

EPiServer help system

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

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

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

Online community on EPiServer World

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

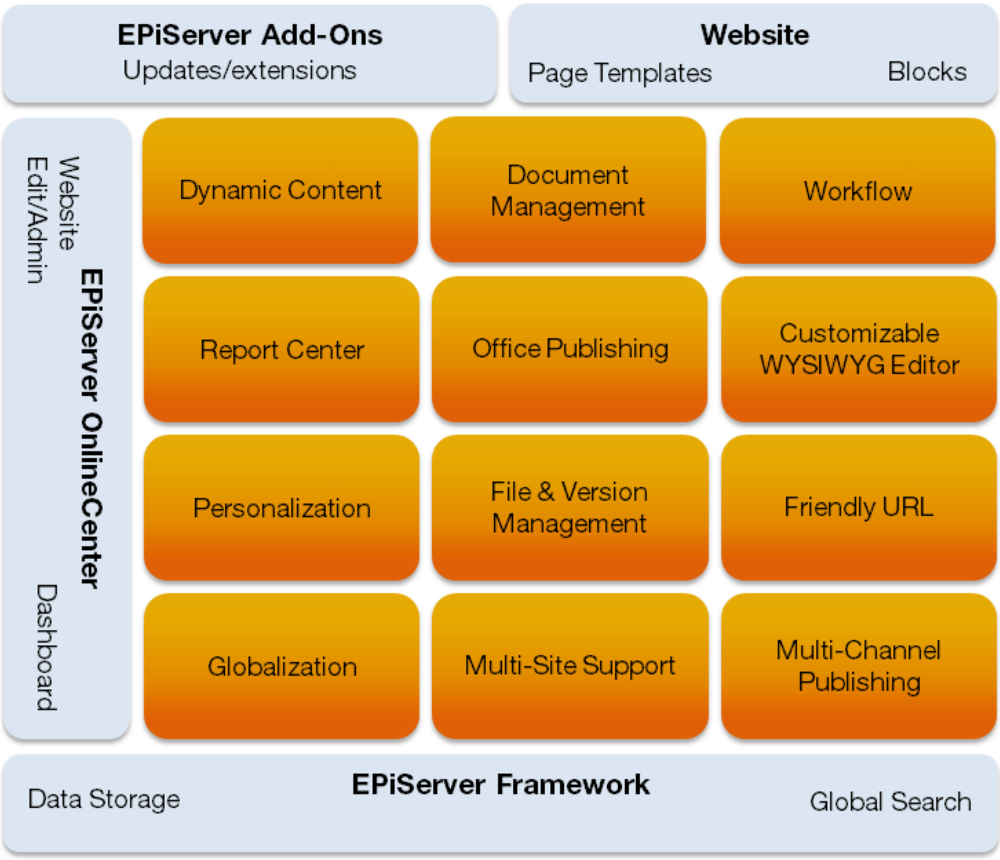
Copyright notice

About EPiServer CMS

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

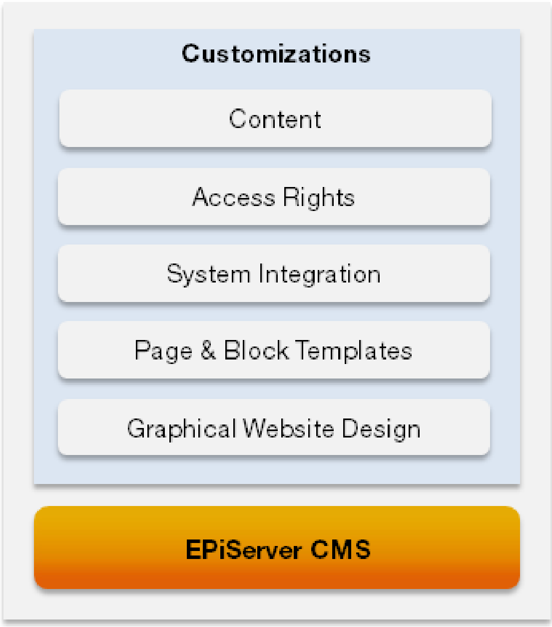
The EPiServer CMS platform

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



The customized website

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



Customizations typically include the following:

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

Function overview

EPiServer CMS supports the following functions:

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

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

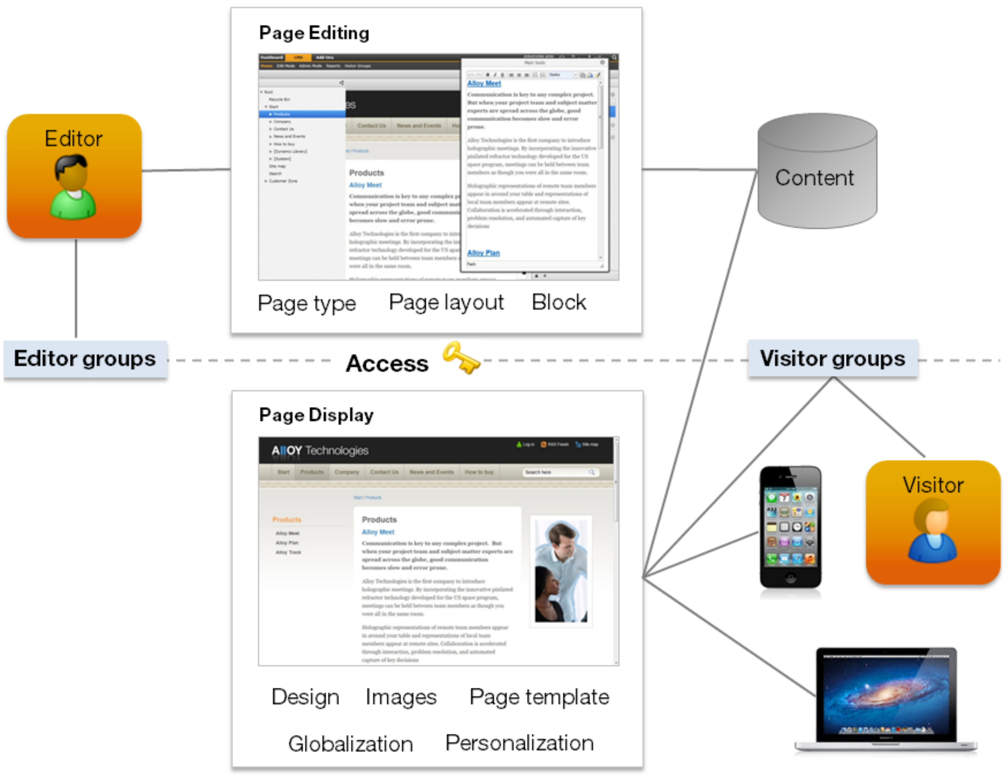
Roles

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

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

Work procedure for creating and displaying a web page

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



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

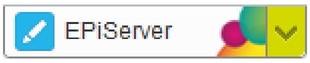
Getting started

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

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

Logging in

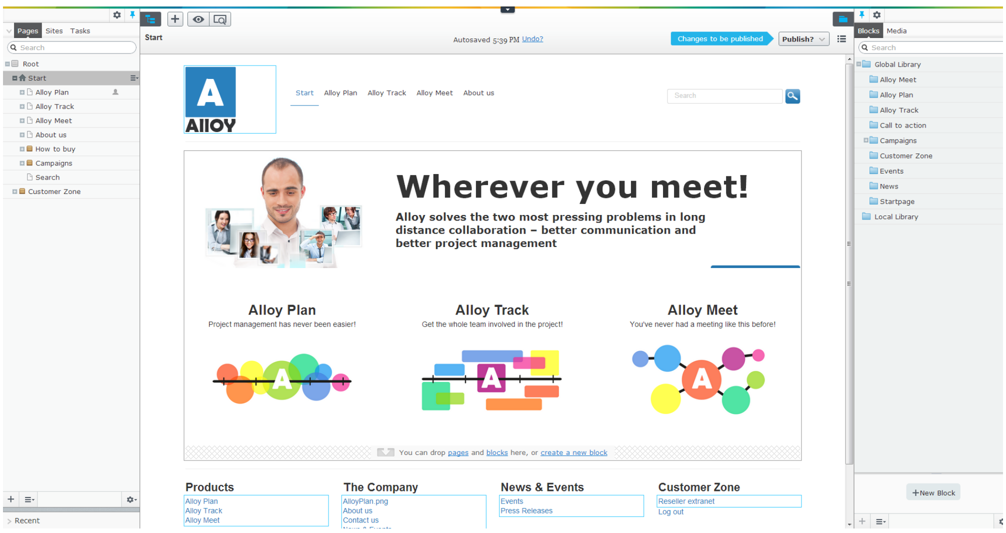
Access the EPiServer website as follows:

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


4. In the menu, select which interface you want to work with.
5. When logged in, use the **global menu** at the top to navigate to the different systems integrated with your website.


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


Navigating from the global menu



From the global menu, **CMS** is the point where you access the functions for EPiServer CMS. Depending on your access rights, you can access the following working areas:

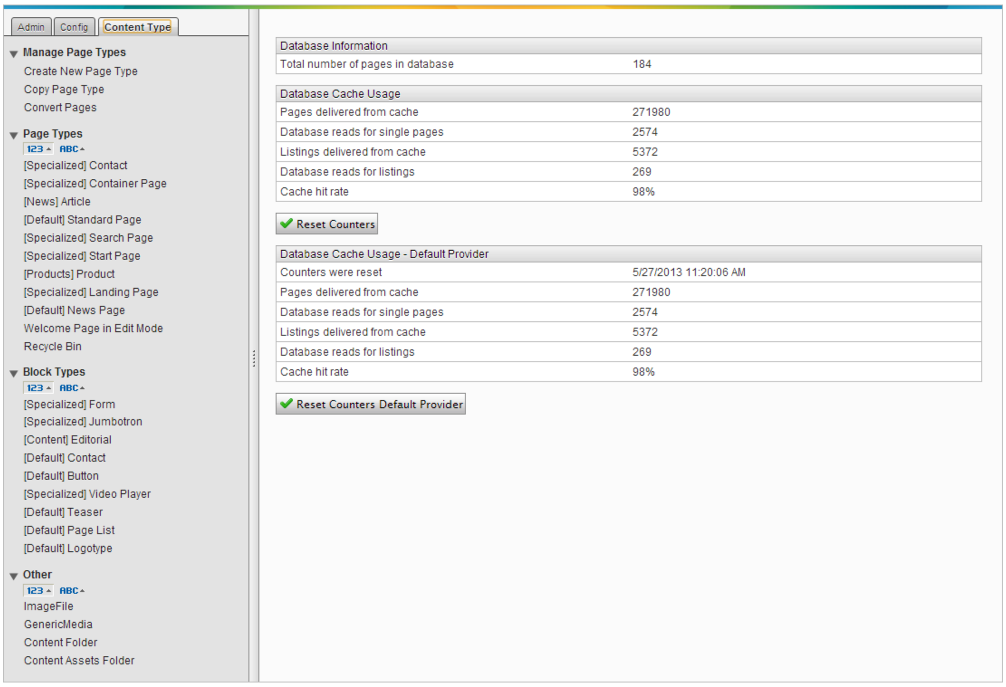
- **Edit** is the **edit view** you are normally redirected to by default after login, where you can edit content for publishing.
- **Admin** is the **admin view** where you, for example, manage access rights on the website.

- **Reports** is where you can scan your website, for example, search for pages with broken links, see *Report Center*.
- **Visitor Groups** is where administrators create and modify different target groups for editors to personalize the content on the website, see the section about personalization.
- **Live Monitor** visualizes the current traffic on an EPiServer CMS-based website.

For information about **Dashboard**, **Add-ons** and **Search**, see the *EPiServer platform documentation*.

Admin view

The start page of the administrative interface provides an overview of the database information for the website.



- **Database Information** shows the following information:
  - **Total number of pages in database** shows the total number of pages stored in the database.
- **Database Cache Usage** shows the following information, where you can also see the latest date and time for reset of the cache counting.:
  - **Pages delivered from cache** shows the number of pages that was delivered from cache by all providers.
  - **Database reads for single pages** shows the number of times single pages was fetched from the database by all providers.
  - **Listings delivered from cache** shows the number of times page listings was delivered from cache by all providers.
  - **Database reads for listings** shows the number of times page listings was fetched from the database by all providers.
  - **Cache hit rate** shows in percent how many pages that was fetched from cache by all providers.
  - Click **Reset Counters** if you want the counting to start over from zero.
- **Database Cache Usage – Default Provider** works in a similar way as **Database Cache Usage**, here applicable to the default provider.
  Click **Reset Counters Default Provider** if you want the counting to start over from zero. If you use several providers, they will be listed here.

- The following tabs are shown to the left:
  - **Admin**
  - **Config**
  - **Content Type**

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

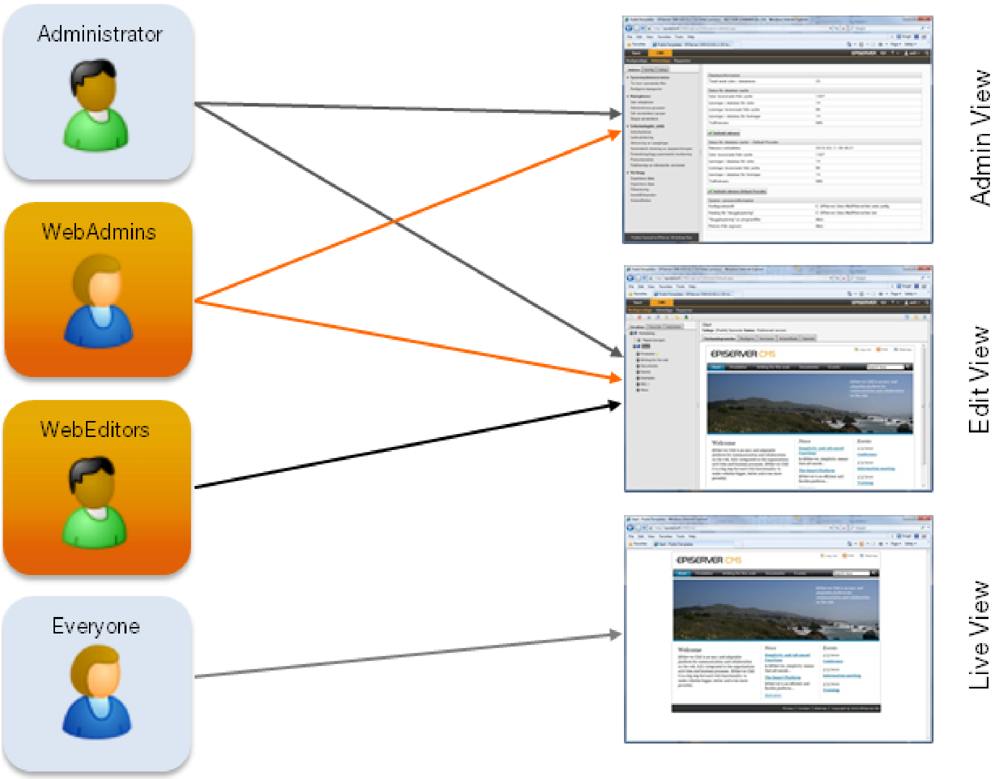
For more information on how to customize, configure and set up a EPiServer CMS website, see the *EPiServer CMS SDK > Developer Guide*.

Setting access rights

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

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

Providing access rights to different views



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

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

User groups in a standard installation

The following default user groups and their functions comes in a standard installation:

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

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

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

Related topics

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

Managing users and user groups

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

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

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

Creating groups in Windows

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

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

Creating and deleting groups in EPiServer CMS

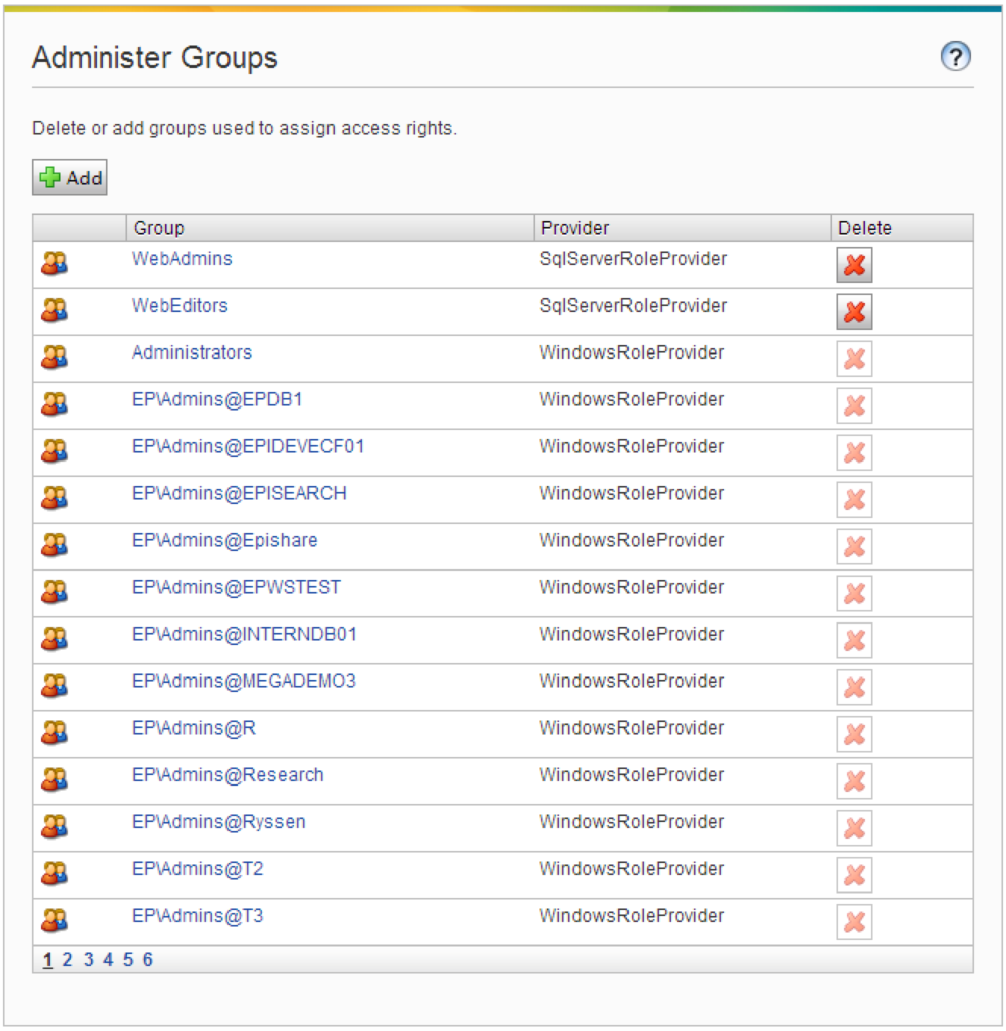
You can create your own user groups and add users as members. Here you also can create the group **VisitorGroupAdmins** as described in *Providing access rights to different views*.

Creating a group

Create a new group as follows:

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

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



Deleting a group

Delete a group as follows:

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

in this way.

4. Confirm the deletion.

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

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

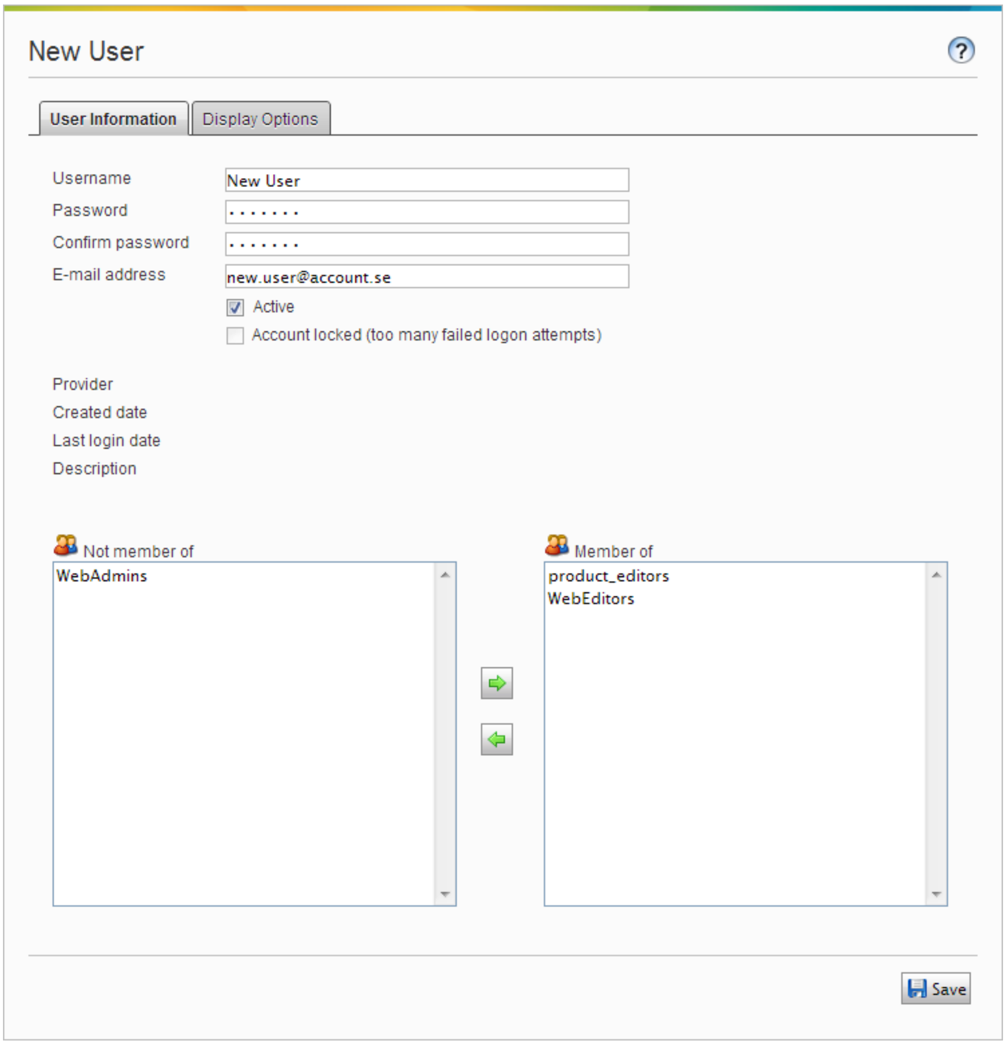
Creating, editing and deleting users

You can create your own user groups and add users as members.

Creating a user

Create users inEPiServer CMS as follows:

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



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

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

Editing a user

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

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

Edit a user as follows:

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

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

Deleting a user

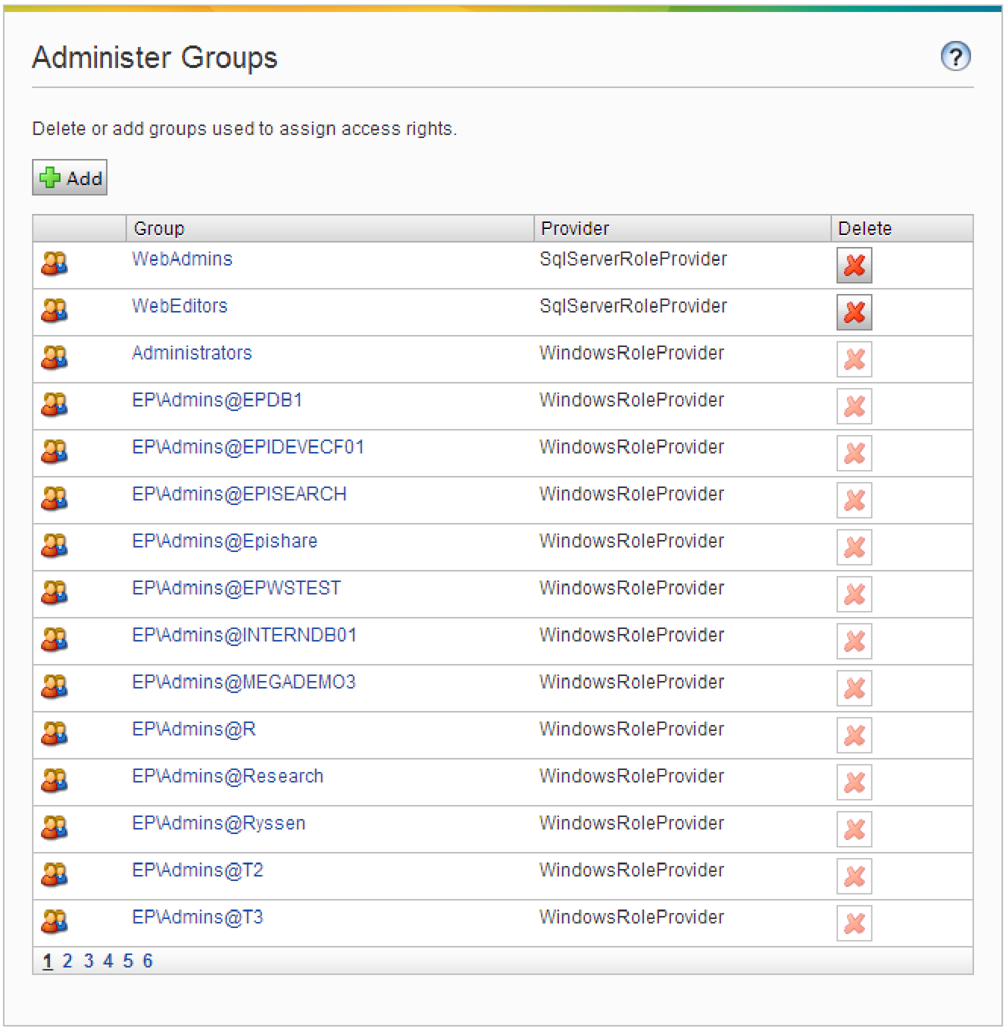
Delete a user as follows:

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

Searching for a user or group

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

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



Setting access rights in the tree structure

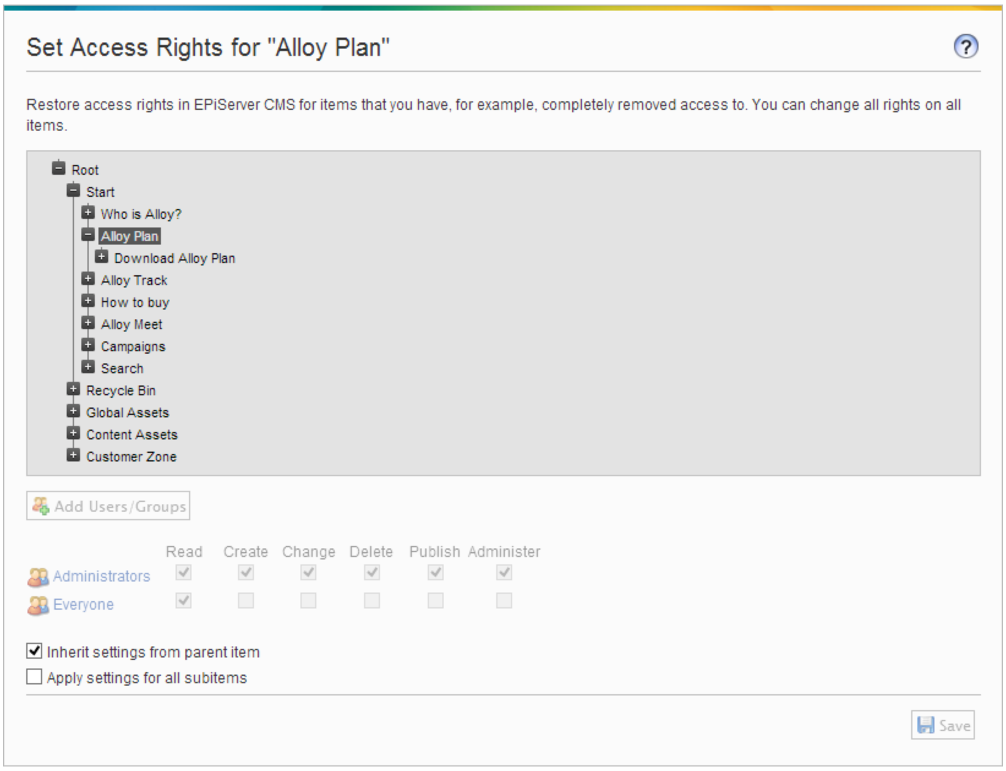
From the EPiServer CMS admin view you can define more complex access rights and apply these to entire parts of the ***website structure***. You will most often define access rights for pages or blocks, but it is also possible to define settings for other types of content available in the tree structure. Access rights can also be defined from edit view, but only for one page or one block at the time.

For better control of content creation on large websites, it is recommended to base access rights on ***user groups*** instead of individual users. You can create user groups based on your website structure, for example, “Product Editors” or “News Editors”, and add individual users to these. A user can be a member of one or more “structure” groups.

Depending on the membership provider setup for the website, user groups and user accounts can be created outside EPiServer CMS, or directly in EPiServer CMS. When setting up access rights, start by defining the user groups needed and provide access levels for these in the tree structure. Then add individual users to the user groups.

To gain access to the edit view, all editors must be members of the default group **WebEditors**. In addition to this, editors can then be added to various structure groups, depending on their work tasks.

Refer to *Users and user groups* for more information on how to create user groups and user accounts.



Access rights and options

EPiServer CMS has different access rights for what a user group or a user can do, for example, one group may have access rights to read and publish content but not to create, edit and delete content.

To provide access rights, select one or several of the following options:

- **Read** means the group/user can read the current content.
- **Create** means the group/user can create content under the current content.
- **Change** means the group/user can edit the current content.
- **Delete** means the group/user can delete the current content.
- **Publish** means the group/user can publish the current content.
- **Administer** means the group/user can edit dynamic properties and set access rights and language properties on individual content items from edit view. Note that this level does ***not*** provide access to admin view.

If you clear any of these options for a group or individual users, it means that their access rights for that action have been denied.

For example, if you do not want the group **Everyone** to be able to read a specific page, clear the **Read** check box from this group. Remember to select the **Save** button once you have assigned the access rights that are to apply for that particular page.

Editors must have **Create** access rights on the **root** level of the website to be able to create **blocks**.

When setting access rights, you have the following options:

- **Inherit settings from parent item** will ***inherit*** settings from closest parent item, apply these to all subitems and ***clear*** any existing settings for all items that have inheritance set. This is the default setting, meaning that all subitems will have the same settings as their closest parent item in the structure, until changed.

- **Apply settings for all subitems** will apply defined settings for all subitems, ***in addition to any existing settings***. This is used for adding additional settings to subitems that are not inheriting and have different settings from their parent item, without affecting any of their existing settings.

Recommended access rights settings

The following access rights settings are recommended for users in EPiServer CMS:

- **Read**. Can read published content but have no access rights to view unpublished page versions or the version list.
- **Read and change**. Can edit existing content but not publish it. The user can view the version list and unpublished content.
- **Read, change and publish**. Can edit existing content and publish it.
- **Read, create and change**. Can create new content and edit existing content but not publish it.
- **Read, create, change and delete**. Can create, edit and delete content but not publish it.
- **Read, create, change, delete and publish**. Can create, edit and delete content and publish it as well.
- **Read, create, change and publish**. Can create, edit and publish content but not delete it.
- **Read, create, change, delete, publish and administer**. Have full access rights to do everything.
- **Read and administer**. The user are allowed to view published content as well as set dynamic properties, language settings and access rights for a single page.

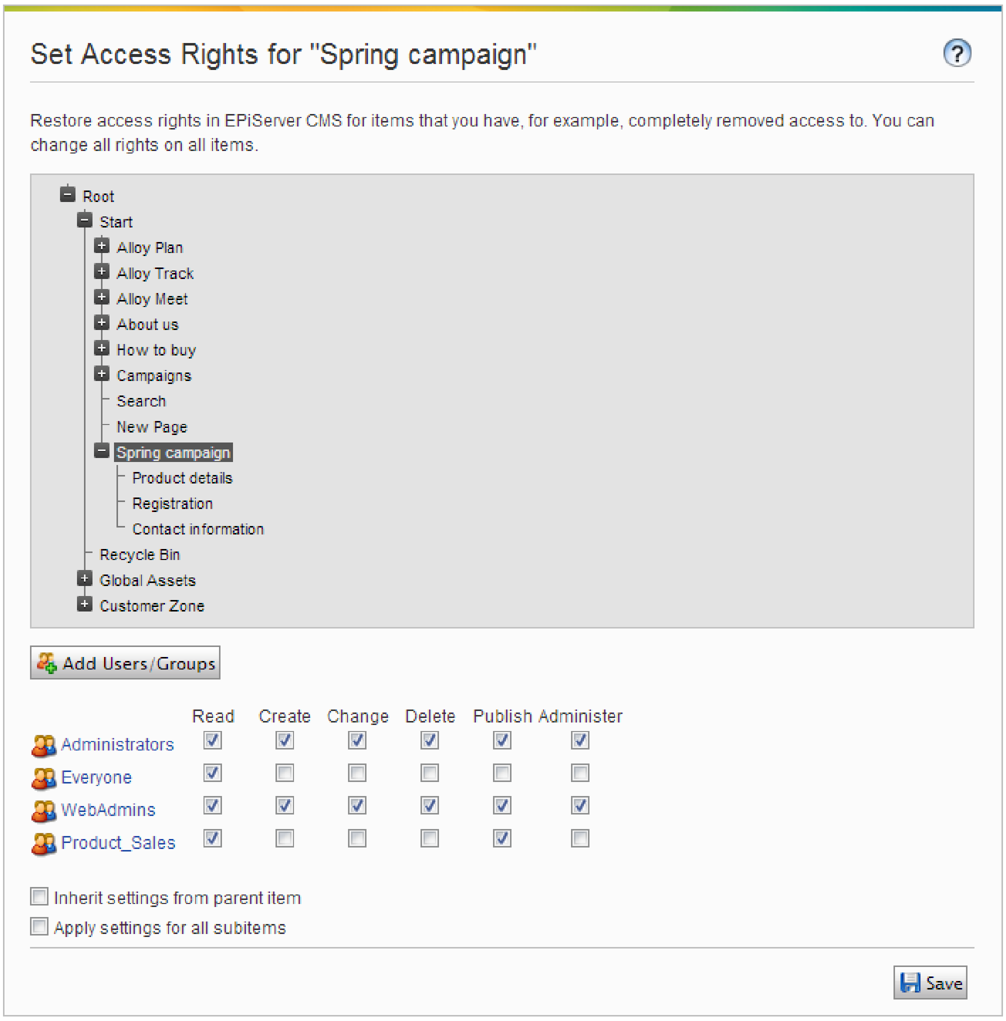
> ***Note*** A valid site scenario could also be **Read, create and publish**, which means that a user can contribute with content, for instance to a forum. However, a user with these access rights cannot edit content in the EPiServer CMS user interface since that action requires **Change** rights.

> ***Note*** For editors to be able to create new blocks, the system administrator have to provide **Create** access level on the website’s root directory.

Changing access settings for a parent item with subitems

By default, all items in the tree structure will inherit access rights from their closest parent item. You can define different settings for specific branches of parent items and their subitems by “stopping the upwards inheritance” and defining new access rights for the parent page. When saved, the new settings will be applied to subitems that have inheritance set.

In the example below we want to add the user groups “WebAdmins” and “Product_Sales” to the “Spring campaign” parent page and all its subpages with inheritance.



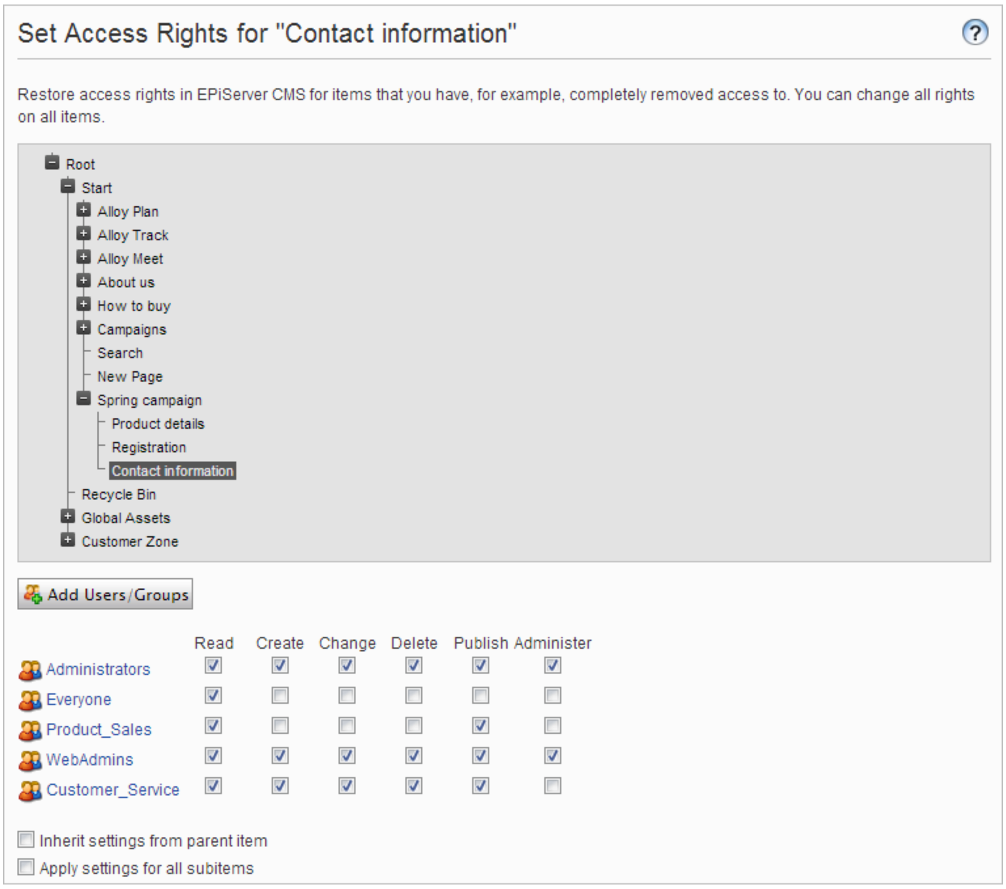
Do the following:

1. On the **Admin** tab, select **Set Access Rights**.
2. In the tree structure, select the ***parent item*** (in this case a page) for which you want to set access rights.
3. The access rights that applies to the item is displayed. By default access rights will be ***inherited*** from the closest parent item. To change settings for the current item, ***clear*** the **Inherit settings from parent item** option.
4. To add additional groups or users, click **Add Users/Groups**, select the ones you want and add them to the list of user groups (or users) for the content item. Search to find the desired user or user group, and add them one at the time by clicking **OK**.
5. Specify the ***access levels*** for each user group (or individual user) in the list by selecting either **Read**, **Create**, **Change**, **Delete** and **Publish** or **Administer**.
6. Click **Save** to save the defined settings. The same changes will be applied to all subitems that have "Inherit settings from parent item" set.

Adding settings to subitems without affecting existing settings

In a structure where you already have different settings for different tree branches, you can also add additional settings “on top” of existing ones without affecting these.

In the example below, the “Spring campaign” page (not inheriting) has three subpages where the “Contact information” page has specific access right settings, and the other pages are inheriting their settings from “Spring campaign”. We want to add the user group “Customer_Service” to all subpages, but without affecting any existing settings on the “Contact Information” page.



Do the following:

1. Select the “Spring campaign” page in the structure.
2. Click click **Add Users/Groups**, find the “Customer_Service” user group and add it to the list.
3. Select ***access levels***, in this case **Read**, **Create**, **Change**, **Delete** and **Publish**.
4. Select **Apply settings for all subitems**.
5. Click **Save**.

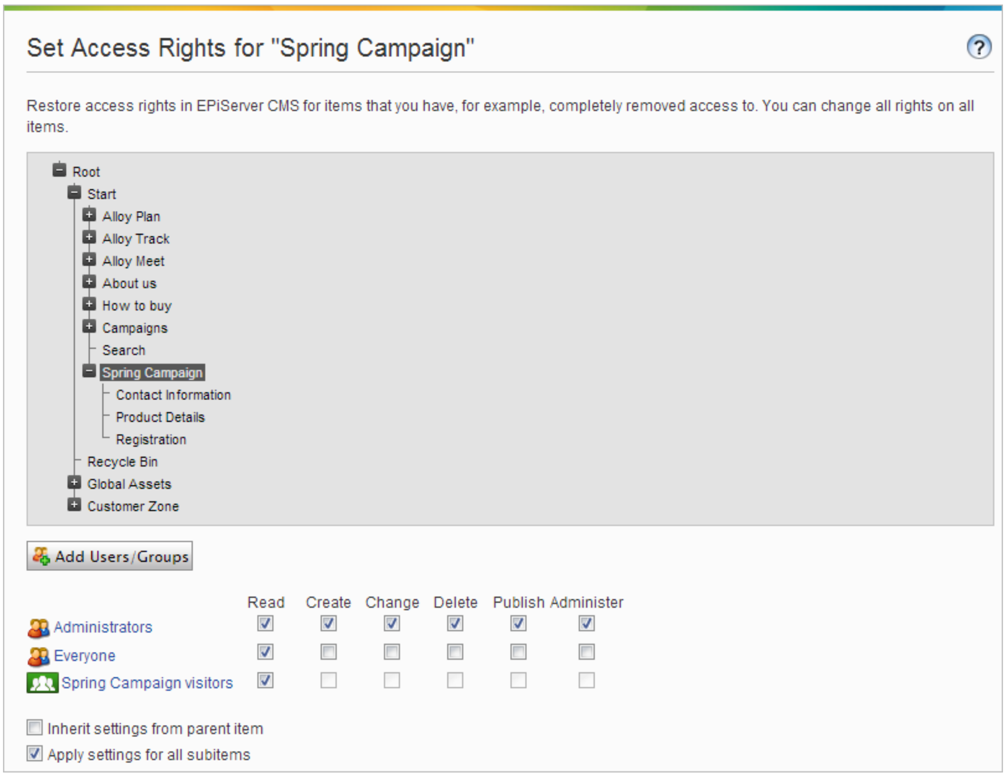
The “Customer_Service” group has been added to all subpages, and the specific settings for the “Contact information” page have been left untouched.

To **reset** access rights to be identical with the parent item, select the **Inherit settings from parent item** option again, and any specific settings for a subitem will be cleared.

Adding access rights for visitors and visitor groups

By default, the user group **Everyone** is granting anonymous visitors access to public websites. This means that **Everyone** must have read access to content that you want to be publicly available. You can also create user groups for visitors, allowing them to view specific “hidden” content that is not otherwise publicly available. This will require a registration and login procedure for visitors to access the content. The feature is useful for instance if you want to create a “customer area” for registered customers on your website.

You can also set specific access rights for visitor groups, which are visitors grouped by certain visitor criteria such as number of visits, geographical location, or time of visit. To define access rights for visitor groups, follow the instruction as described above but select the **Visitor groups** type option in the search for Users/Groups dialog.



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

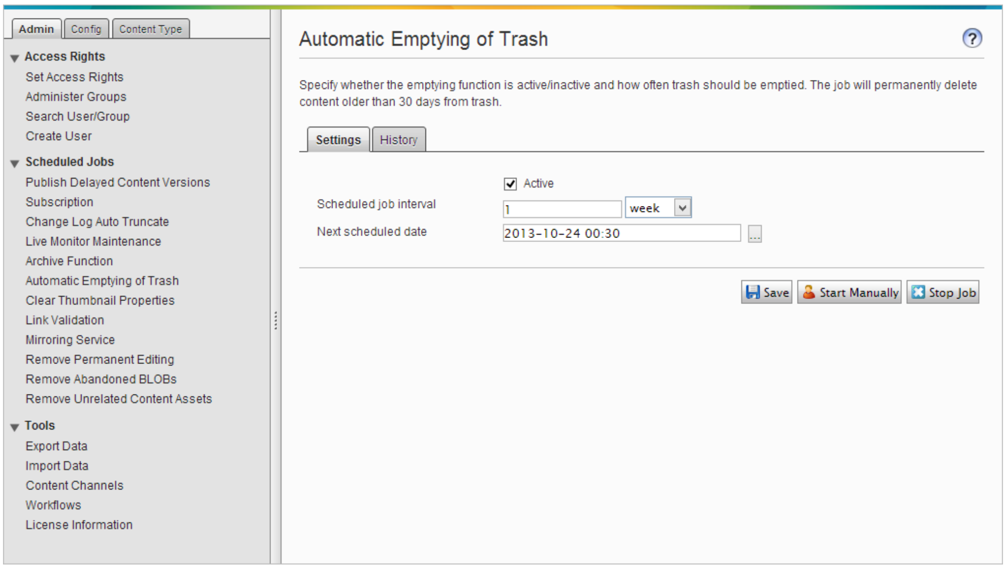
Scheduled jobs

A **scheduled job** is a service performing a specific task that can be executed repeatedly at a given time interval, or when an administrator starts the job manually. In a standard installation of the EPiServer platform with EPiServer CMS and EPiServer Commerce, there are a number of scheduled jobs available, of which some are enabled by default with preset values. You can also develop your own customized scheduled jobs for specific tasks on your websites.

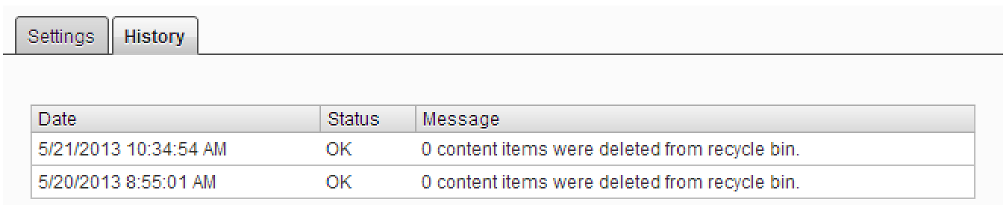
Administering scheduled jobs

Manage scheduled jobs as follows:

1. Log in as an administrator and navigate to the EPiServer CMS **Admin** view.
2. Select the desired scheduled job under the **Scheduled Jobs** section of the **Admin** tab.
3. Check the **Activate** check box to activate the scheduled job.
    - If you want to run the scheduled job manually, click **Start Manually** and the job will be executed immediately.
    - If you want the scheduled job to be run ***automatically***, set the desired time interval in **Scheduled job interval**. The time when the scheduled job will be run the next time will be displayed in **Next scheduled date**.
4. Click **Save** to save your changes.



Under the **History** tab, you can monitor the status and results when the scheduled job has been executed. If a job has failed, information about this will be displayed under **Message**.



EPiServer CMS-specific scheduled jobs

Automatic emptying of trash

You can set up how often your trash should be emptied with the **Automatic Emptying of Recycle Bin** job. With automatic emptying, all content in trash older than 30 days will be permanently deleted by default. Trash can also be emptied manually, then all content will be permanently deleted immediately.

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

Publish delayed content versions

You can define how often the system should check if there are content versions with a specific future publication date and time set with the **Publish Delayed Content Versions** job.

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

Subscription

The **Subscription** feature in CMS allows visitors to define the frequency for receiving subscription information. This job will check for information from the system to be included and distributed in the subscription send-out.

Mirroring service

You can define the frequency for mirroring of content between websites with the **Mirroring Service** job. If your website is set up to mirror content from one website to another, this can be done either manually, or automatically at specific intervals.

Link validation

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

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

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

Archive function

You can set how often the system should archive information after the publication period has expired with the **Archive Function** job.

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

Remove unrelated content assets

You can delete all content folders containing media related to the deleted content items to removed pages or blocks with the **Remove Unrelated Content Assets** job.

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

Clear thumbnail properties

You can clear all the 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, for example, on the website and BLOB supported content.

Live Monitor maintenance

If Live Monitor is installed on your website, this job will remove Live Monitor generated data older than

24 hours from the database.

Change log auto truncate

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

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

Remove permanent editing

You can clear the **Permanently Mark as Being Edited** marking of pages in 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 once every hour.

Remove abandoned BLOBs

EPiServer CMS can store media files in a cloud service instead of the website's database. This job tracks deleted files in CMS and makes sure any stored data is also deleted from the BLOB provider used for storing the data.

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

Exporting and importing data

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

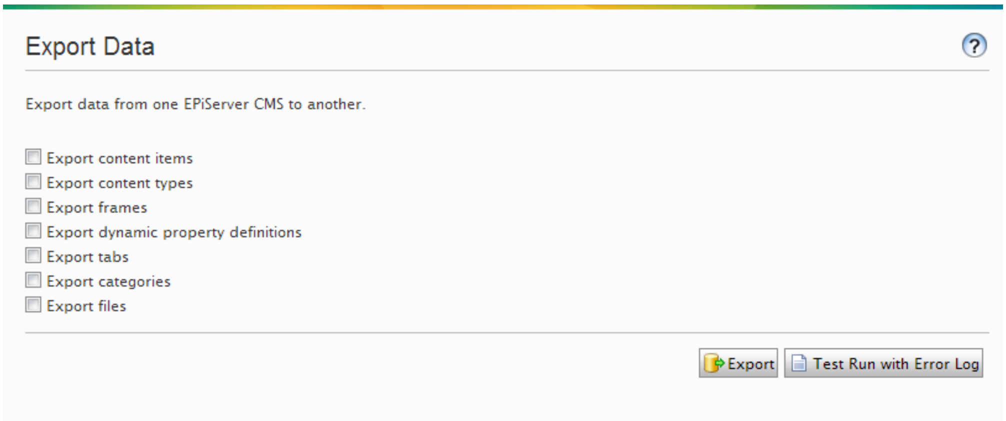
Exporting data

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

You can export the following:

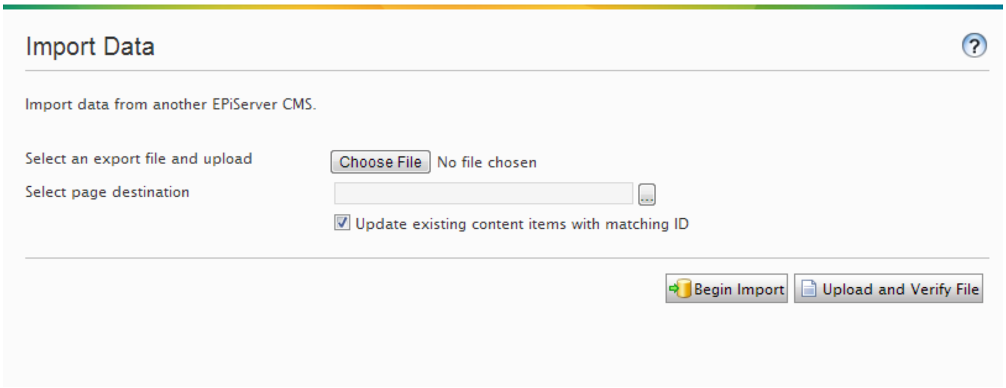
- Pages with (if you so choose) associated page types
- Page types
- Frames
- Dynamic property definitions
- Tabs
- Categories
- Files
- Visitor groups

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



Importing data

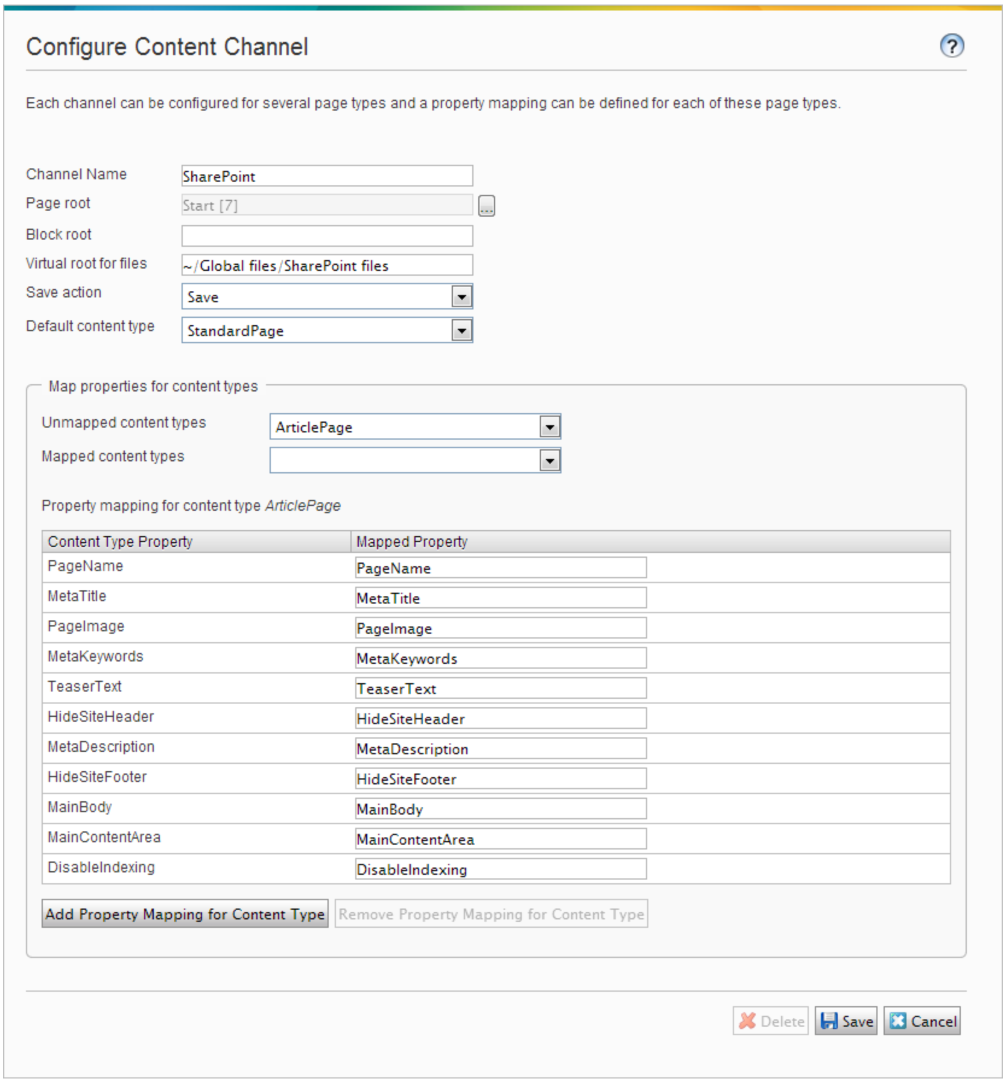
With the **Import Data** function, you can retrieve information that was previously exported from another EPiServer CMS website. Start by indicating the files you want to import. Files must end with .episerverdata in order for the import to function. The files are read and checked. Information on their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



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

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

Content channels



Content channels is an API to allow external systems to push content to EPiServer CMS. Each channel consists of a number of settings that define the content, content types and properties to be retrieved.

Create a content channel as follows:

1. On the **Admin** tab, select **Content Channels**.
2. Click **Add**.
3. In **Channel name**, name the channel. ***Note*** The name that you have entered here is used when configuring the external system.
4. In **Page root**, select where in the tree structure that you want the pages from the external system to be displayed.
5. In **Block root**, enter the path to the tree structure where you want the block library from the external system to be displayed.

6. In **Virtual root for files**, enter the path in the tree structure where you want the media library from the external system to be displayed.
7. In **Save action**, select any of the following options to define which status the content will receive when transported to EPiServer CMS:
   - **None**. Set the save action to **None** if you do not want any content to be retrieved from the external system. This can be seen as a way of switching the channel off.
   - **Save**. The content will be imported so that they have status **Not ready**.
   - **Check in**. The content will be imported so that they have status **Ready to publish**.
   - **Publish**. The content will be imported and published.
8. In **Default content type**, state which content type you want to be used as default when retrieving content from the external system.
9. Map the content type properties according to the instructions below and click **Add**.

Mapping content type properties

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

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

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

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

Workflows

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

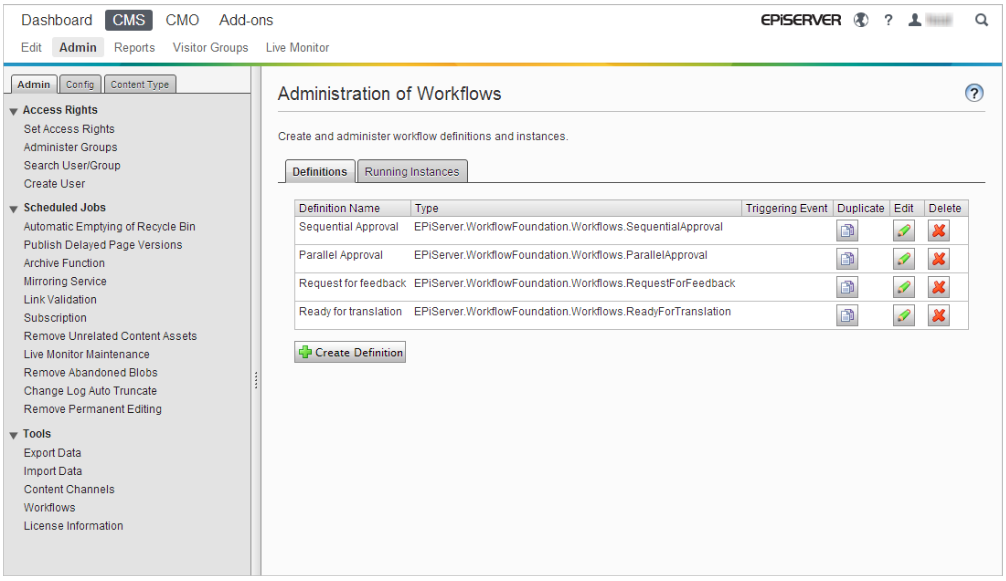
The basis of a workflow is the code that defines actions and events, the Workflow Foundation files. The workflow code base is flexible and can be reused for different scenarios. Sometimes a workflow should start manually, another time automatically. In this case, you create different **definitions**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

The following workflows are described:

- **Sequential approval workflow**. The sequential approval workflow involves one or more people/groups receiving a task to approve an event in a sequential order. If a person in the workflow does not approve the task, information about this will be sent to the person who created the event. The task will not be sent on to the next person in the workflow.
- **Parallel approval of pages**. The workflow for approval in several parallel steps involves multiple people/groups receiving a task at the same time for approval. If one of the individuals approves or does not approve the event, the task will be removed from the others. This can be used in a discussion forum in which we want to moderate entries.
- **Translation product pages**. The translation workflow requires activation of globalization in EPiServer CMS. When a first language version of some content is created, the workflow initiates the translation process by alerting content translators. If the content has not been translated after a certain time, reminders and notifications will be sent.
- **Request for feedback**. The request for feedback workflow allows an editor/group to ask for feedback on content. The individual who starts the workflow selects the content to provide feedback for, and a task is sent to a selected person or group. Note that those providing feedback must have reading access to the content, even if it has not been published.

Administering workflows

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



You have the following tabs:

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

Creating, changing and deleting workflows

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

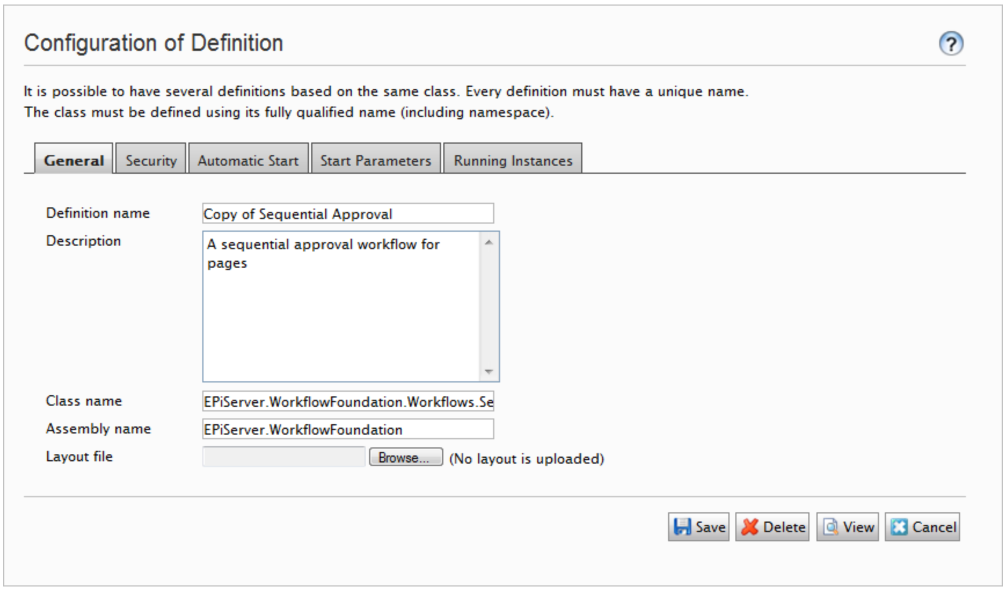
Creating a workflow work procedure

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

Creating a workflow

General tab

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



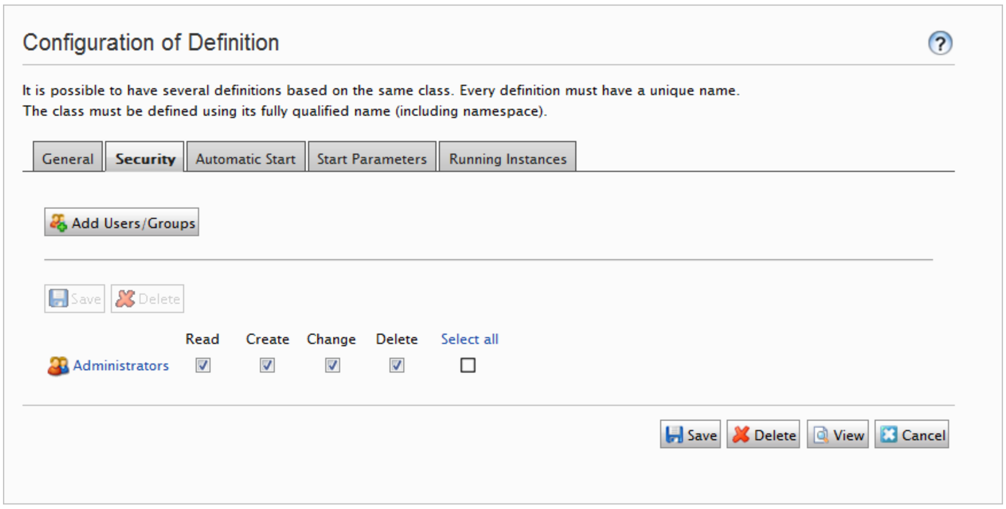
Definition name. Specify the name of the workflow. If the workflow is to be started manually, the name should be as descriptive as possible so that the editor can differentiate between the workflows.

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

- Class name. Specify the class name that the workflow has in the code. The developer of the workflow must provide this information. For the four workflows in a standard installation of EPiServer CMS, the class name is as follows for the different flows:
  - **Sequential approval workflow** (class name EPiServer.WorkflowFoundation.Workflows.SequentialApproval)
  - **Parallel approval of pages** (class name EPiServer.WorkflowFoundation.Workflows.ParallelApproval)
  - **Translation product pages** (class name EPiServer.WorkflowFoundation.Workflows.ReadyForTranslation)
  - **Request for feedback** (class name EPiServer.WorkflowFoundation.Workflows.RequestForFeedback)
- **Assembly name**. Specify the assembly name for this workflow. The developer of the workflow must provide this information. In the four workflows available in a standard installation of EPiServer CMS, the Assembly name is always EPiServer.WorkflowFoundation.
- **Layout file**. A layout file is automatically created when you develop the workflow and gives a schematic picture of the different events in the workflow. It is possible to upload your own such picture if you want.

Security tab

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

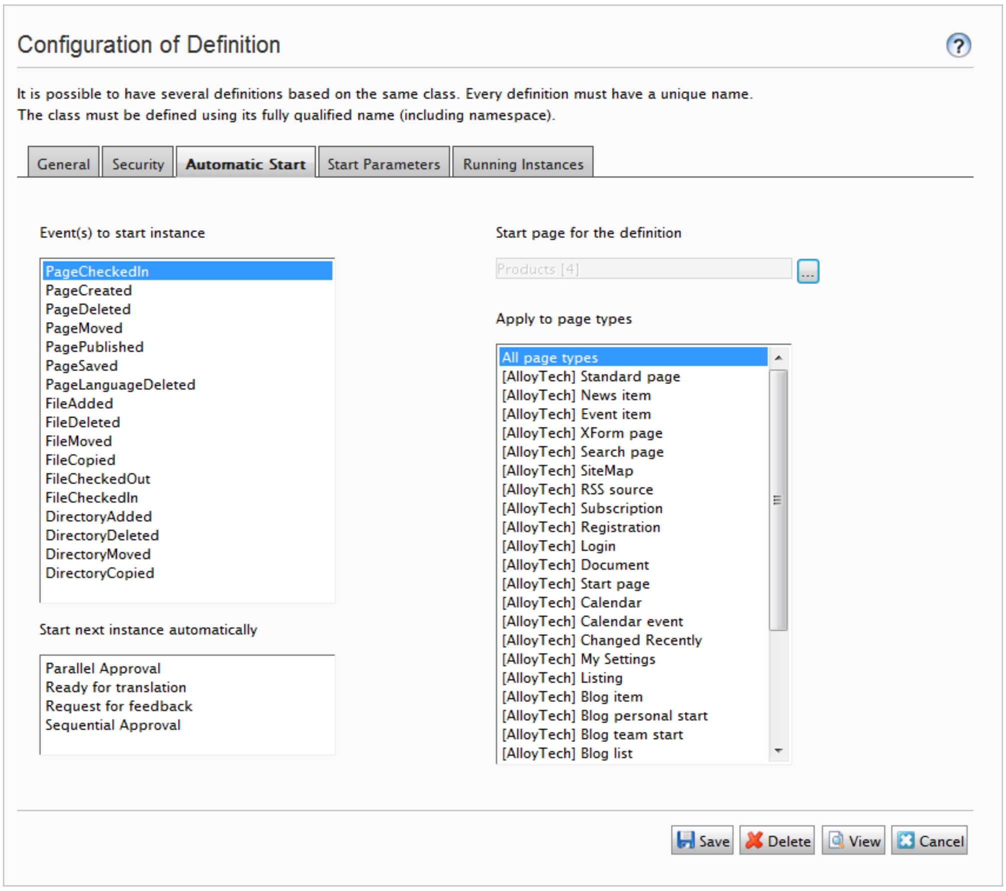


To give different people or groups authorization, you have to add them with the **Add Users/Groups** buttons. By selecting the different check boxes you can give different people/groups different authorization.

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

Automatic Start tab

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



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

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

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

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

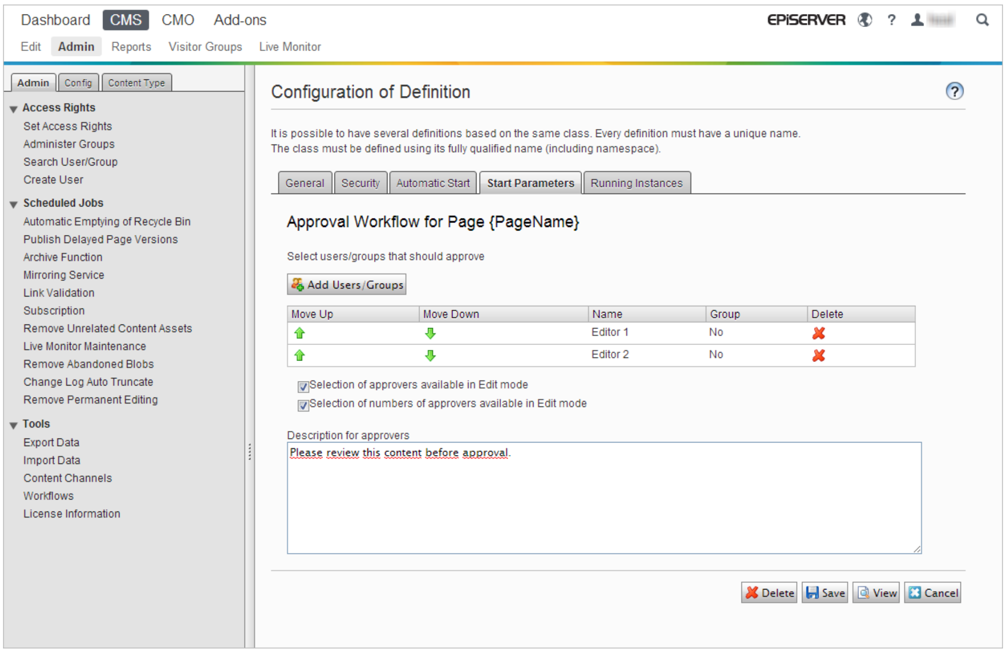
Apply to page types. Sometimes you have specific templates for different functions on the website. Using **Apply** to page types, you can select a certain page type to trigger the instance. You do not have to choose a page type and if you do not, the event will be triggered by the event and place you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

Start Parameters tab

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

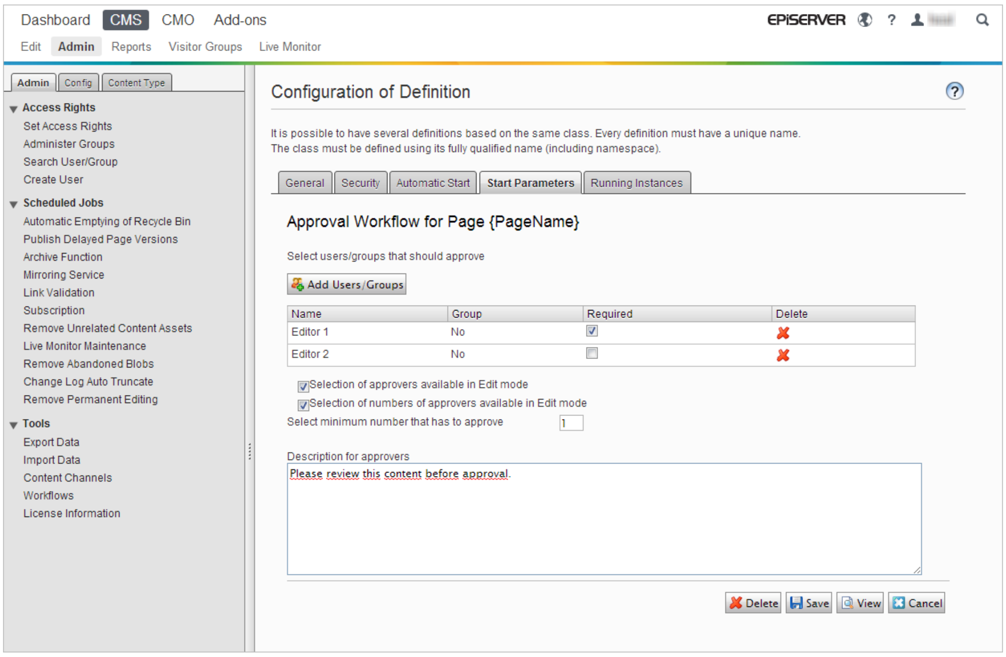
Sequential approval workflow. The Sequential Approval workflow enables sequential approval in several steps. Here we have set up a scenario in which two individuals after each other have to check product pages that editors create. One checks that the prices are correct and the other checks the text and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

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



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

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

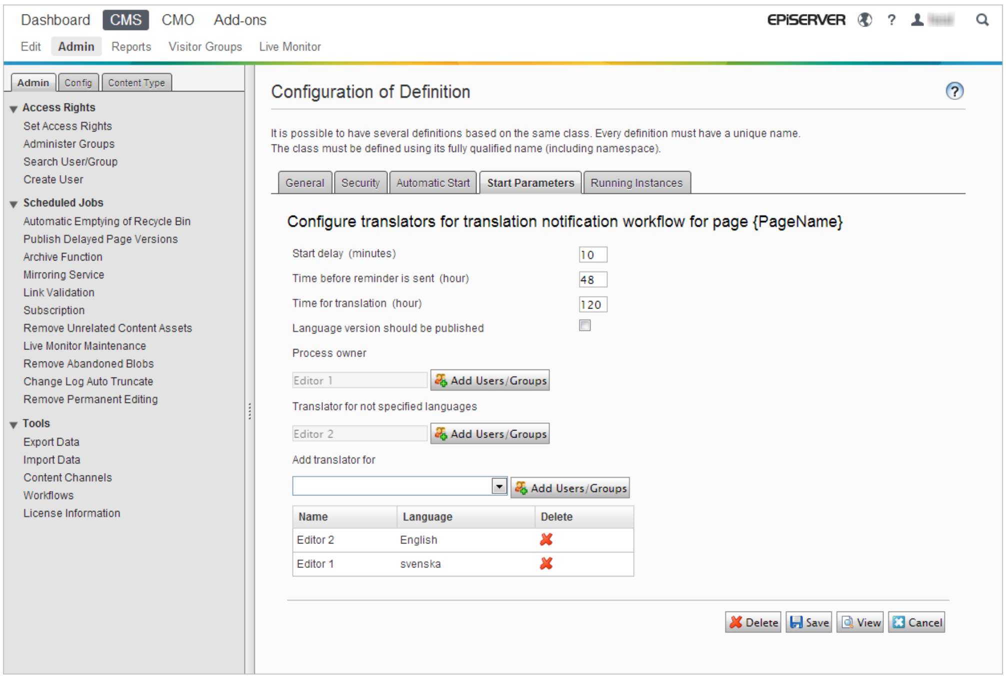


Translation product pages. The workflow for content translation in EPiServer CMS supports translation management in organizations with content in multiple languages. In this scenario, some product pages are created in English, for translation into other languages. First, the sequential workflow is used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

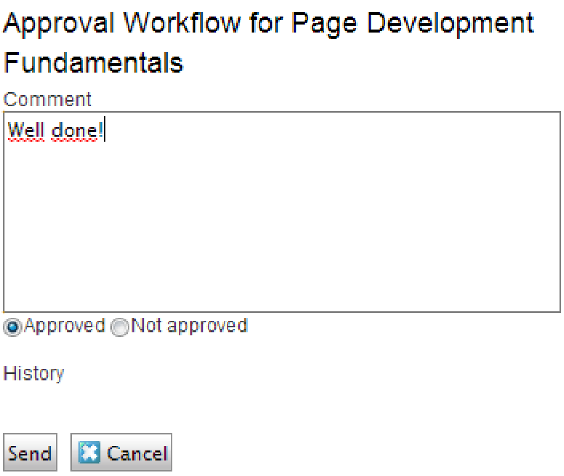
This workflow has the following settings:

- **Start delay (minutes)**. With this parameter it is possible to delay the start of the instance. It is quite common that the first person publishes the page quickly and then sees the changes that ought to be made, so it is best that tasks are not sent every time the page is published.
- **Time before reminder is sent (hour)**. If the person/group that is to translate the page does not do this, a reminder will be sent after the period of time you specify in this field.
- **Time for translation (hour)**. The translation must be done and the page published before the time specified in this field. If it is not done, notification will be sent to the process owner.
- **Language version should be published**. The task is not complete before the page is published if this check box is selected. This means that the task will not disappear from the list of tasks until the page is published.
- **Process owner**. The individual or group that is the process owner will receive information from the workflow. Amongst other things notification will be sent when the page has been translated and published and if the translation has not been done within the specified time.

- **Translator for not specified languages**. Usually, an editor is assigned for each language. For the languages that do not have a specific editor, we can assign an individual or group to manage the other languages.
- **Add translator for**. Select the language in the drop-down list and then specify which group or user is responsible for the language. Only the languages that are activated on the website are shown in the drop-down list.

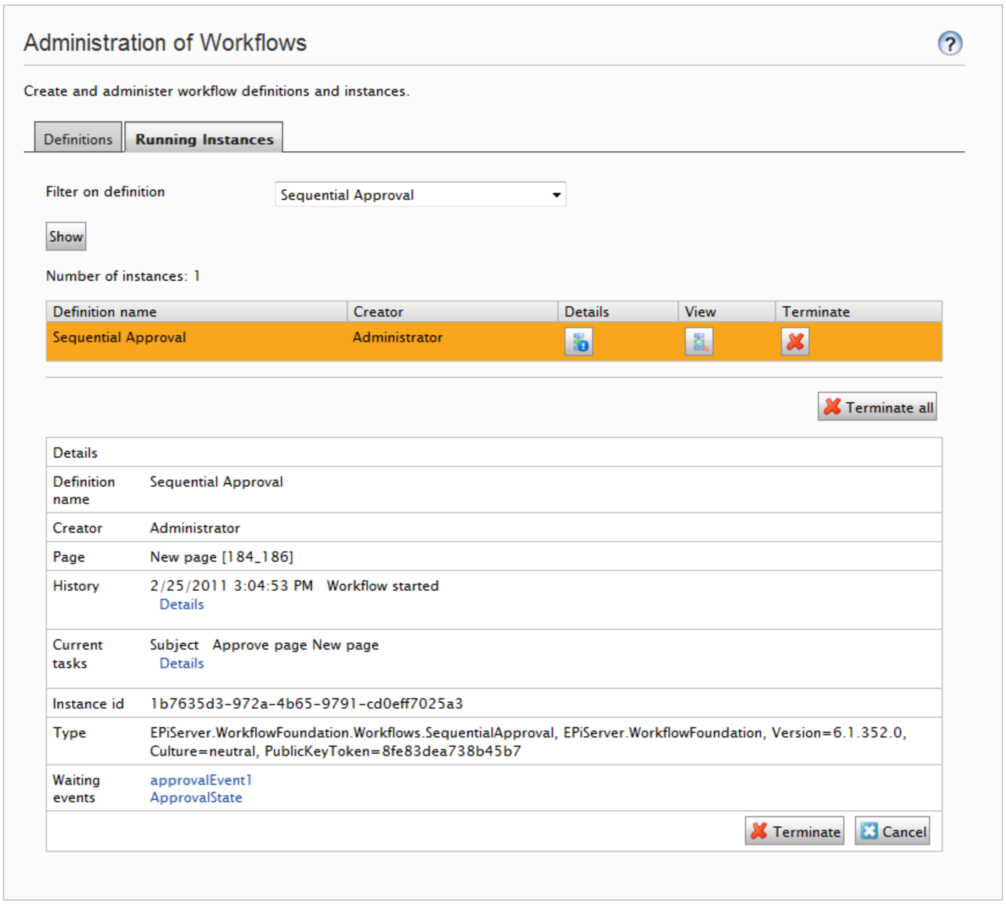


Request for feedback. With the request for feedback workflow an editor can ask for feedback on selected content. In this scenario all editors have the right to start an instance on this workflow to ask for feedback. We have also given them access rights to write their question and decide who will give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



Running Instances tab

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



Editing definitions

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

Deleting definitions

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

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

System configuration

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

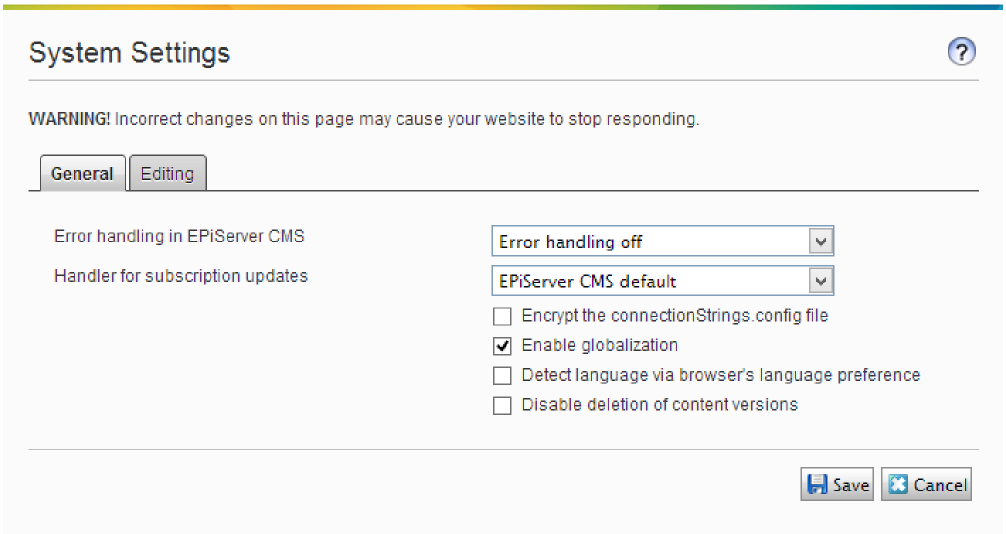
The majority of these settings are made in the **Config** tab in admin view. Some settings are also done in **Internet Information Services (IIS) Manager**. Other settings are made in configuration files on the server.

System settings

In system settings, you define settings for the EPiServer CMS installation. For instance you can activate globalization, change the error handling, and configure version management of content. These settings are usually set during installation and seldom modified.

Refer to *Manage websites* for more information on how to add and define new websites for your installation.

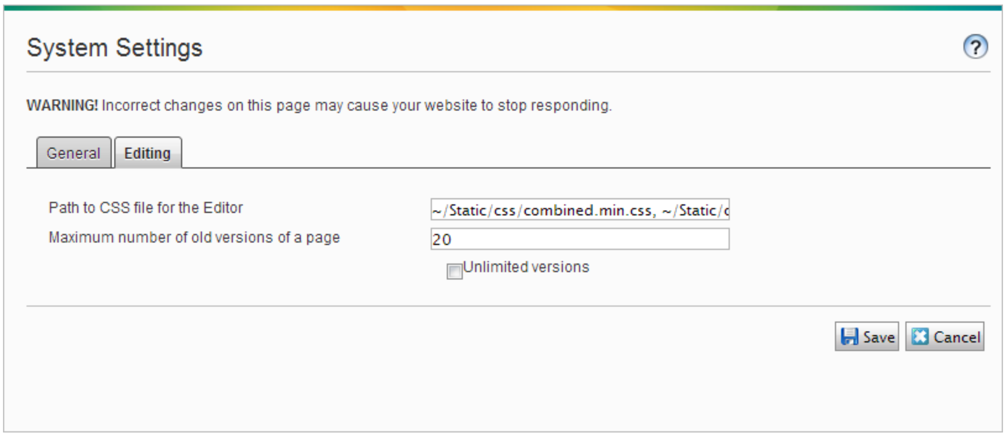
General tab



- **Error handling in EPiServer CMS**. Select how you would like the errors to be handled, whether it should be active for all visitors, remote visitors or should be disabled.
- **Handler for subscription updates**. There is a subscription function that allows visitors to the website to receive information about new and updated pages. Depending on whether you have a website with multi-language support, you can select how the subscription dispatch is to be managed. This list can also include your own solutions for the subscription function.
- **Encrypt the connectionStrings.config file**. The **connectionStrings.config** file contains sensitive information sent to and from the database. To ensure that nobody can read the information, you must encrypt the file. Select this option and save the system settings.
- **Enable globalization**. Select this option to activate management of content in multiple languages (globalization).
- **Detect language via browser's language preference**. Select this option to activate languages to be shown based upon the visitor's browser settings.

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

Editing tab



- **Path to CSS file for the rich-text editor**. The path to the CSS file that controls the appearance of the rich-text editor. This could be the same or a similar CSS file as the site uses for styling content so that the editors get the same look and feel as the site when editing content. It is also possible to set other CSS files for different editors on the website. This is a dynamic property that can be changed in edit view.
- **Maximum number of versions**. In this field, you can specify the number of versions of for instance pages or blocks, that can be stored. If you enter for instance “3”, three versions will be stored in addition to the published version. When a fifth version is created, the first version of the stored page will disappear.
- **Unlimited versions**. Select this option if you want an unlimited amount of versions to b displayed in the version list. For the EPiServer sample site the default is 20 versions.

Manage websites

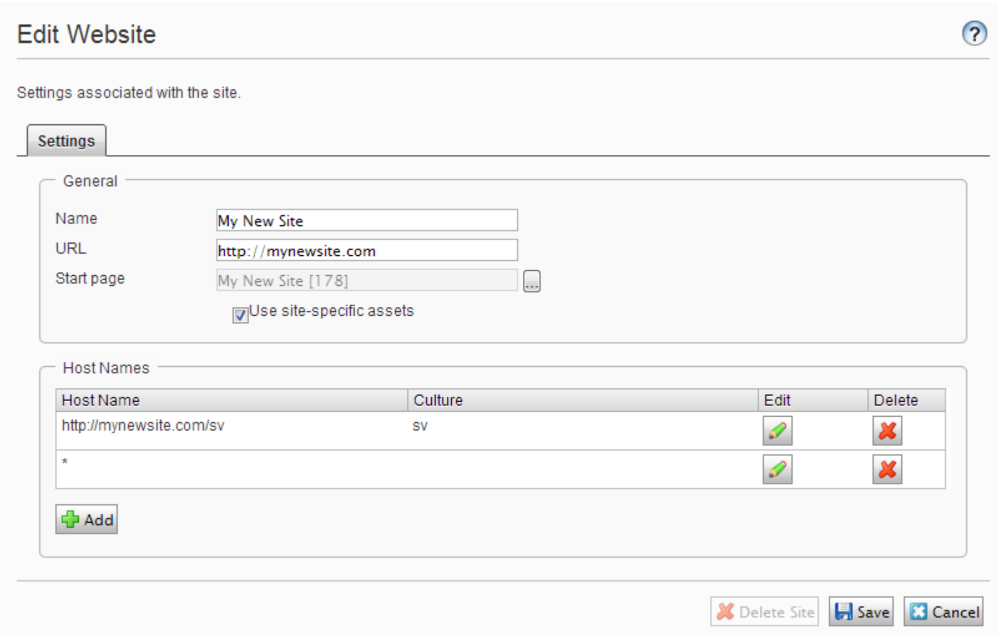
Manage Websites provides an overview of existing sites in your installation, and allows administrators to add new sites, for instance a campaign site, to an installation. You can also remove sites from the installation.

A notification message will inform about the number of sites allowed by the license available for the installation.

The following options are available:

- Clicking any of the **Site ID links** will display more detailed information about the settings for that site. From here you can update the site information.
- **Add Site** allows you to add more sites to your installation, provided that you have available licenses.

Adding and editing a website



Add the following information when creating and updating site settings for your installation:

- **Site ID**. Type a name that identifies the site, for instance “ExampleSite”.
- **Site URL**. Enter the URL for the site, for instance “http://examplesite.com”.
- **Start page**. Select the page to which the visitor is sent if only a host name is specified.
- **Use site-specific assets**. Select this option to ensure that assets (for example, media files and blocks) for this site will not be available for usage for other sites in the installation.
- **Host name**. Enter a specific URL for instance “examplesite.company.com” or “campaign.examplesite.company.com”.
- **Culture**. Select the default language to be used when a visitor accesses the website using the host name.

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

Tip On the **Admin** tab > **Tools** > **License Information**, you can view detailed license information for your websites.

Manage website languages

To manage website languages, see *Managing languages on a globalized website*.

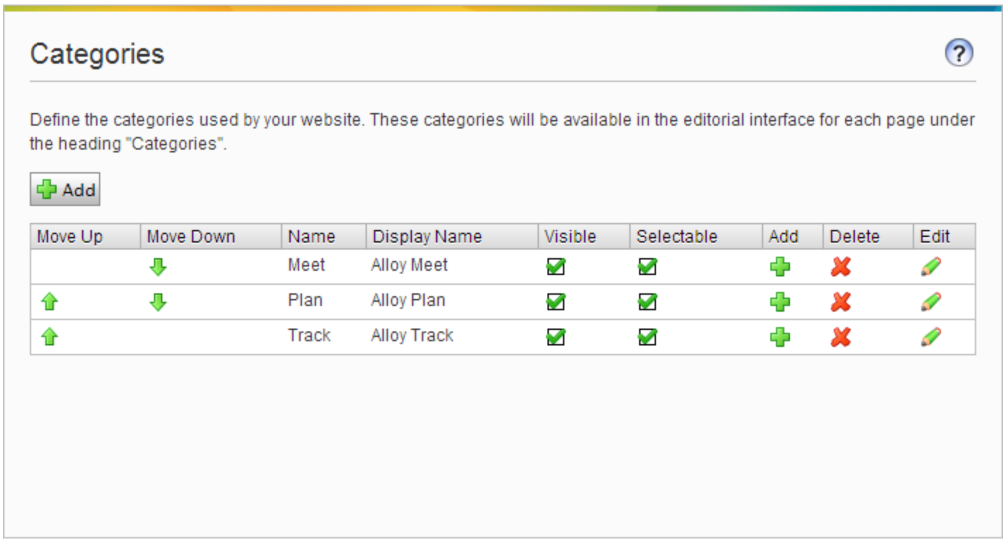
Edit categories

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

Adding a category

Add a new category as follows:

1. On the **Admin** tab, select **Edit Categories**.



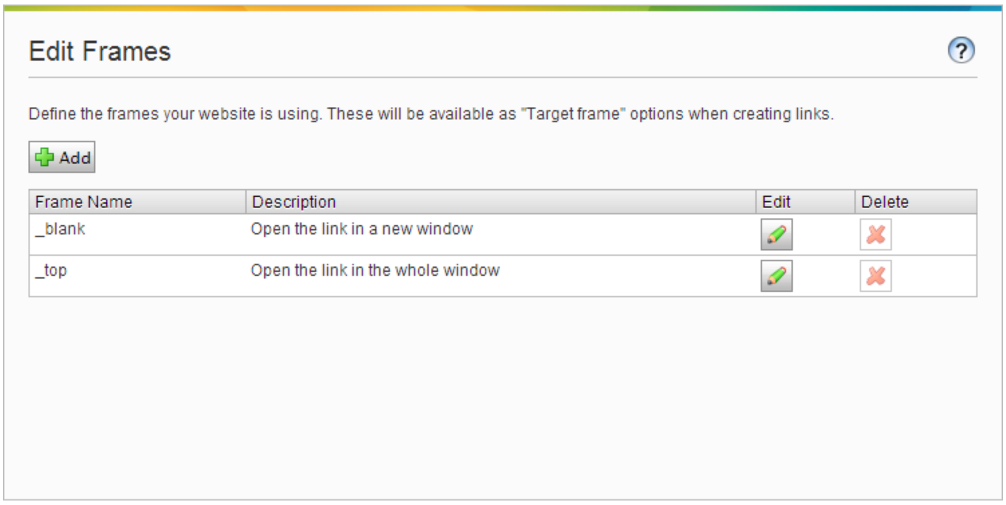
2. Click **Add** to add new main categories.
3. Specify a name in the **Name** field. This name is used when programming.
4. Enter a description in the **Display name** field. This name is seen by the editors when selecting a category. These fields can also be language encoded.
5. Click **Save**.

You have also the following options:

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

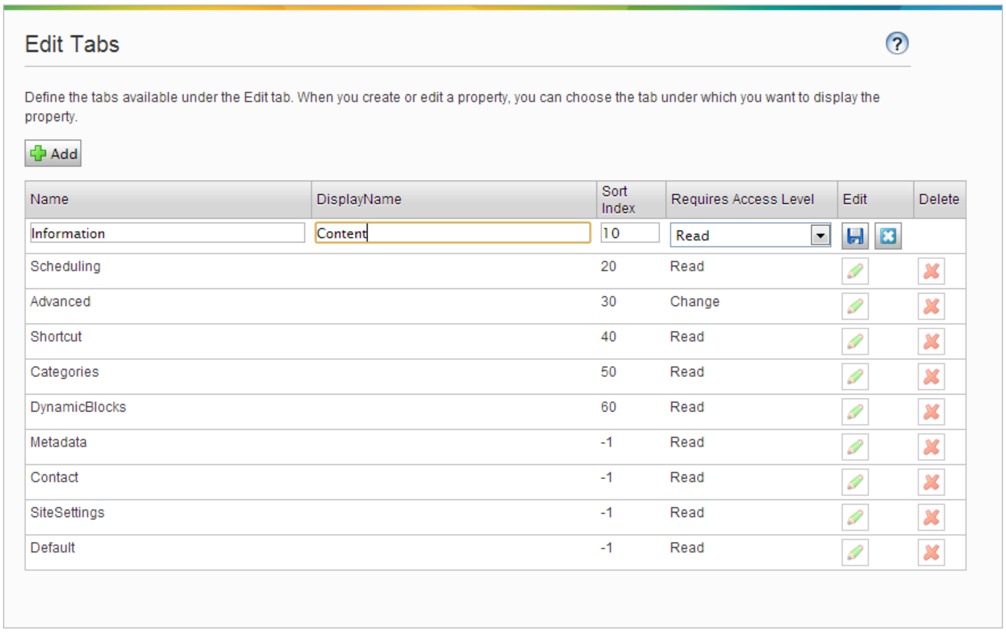
Edit frames

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



Edit tabs

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



Adding and editing a tab

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

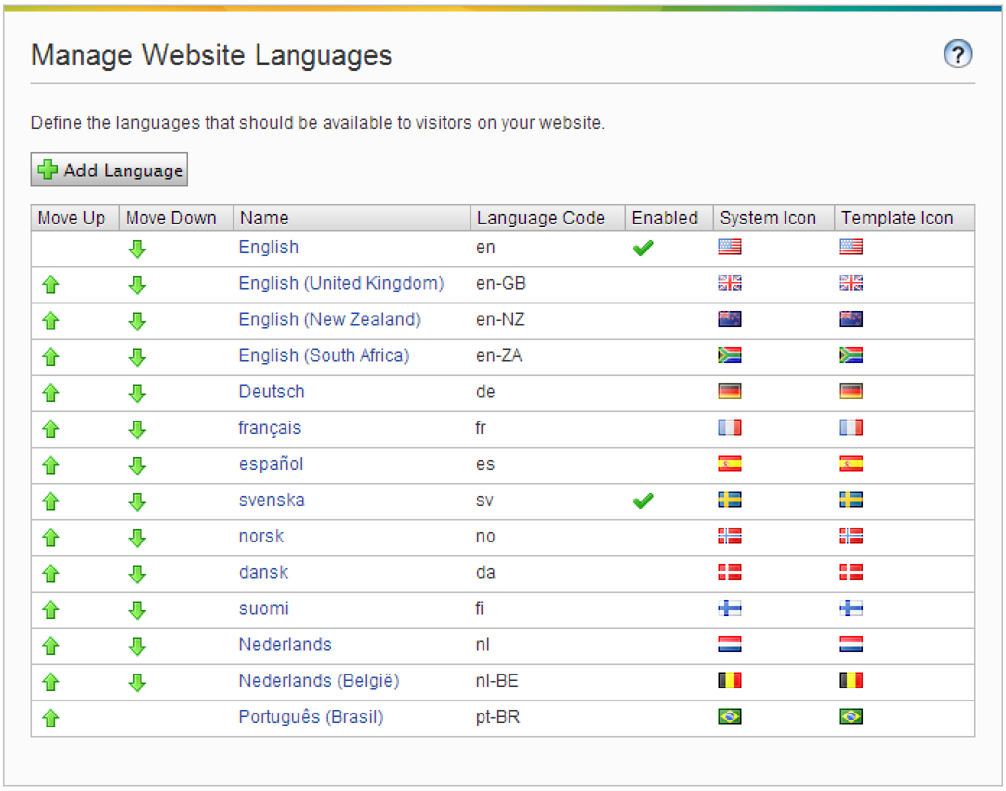
Deleting a tab

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

Managing languages on a globalized website

If you want your editors to be able to create content in a particular language, the language must be added and activated for use. It is possible to change the access level for a language, so that certain editors cannot create or edit pages in a certain language.

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



Creating globalized content work procedure

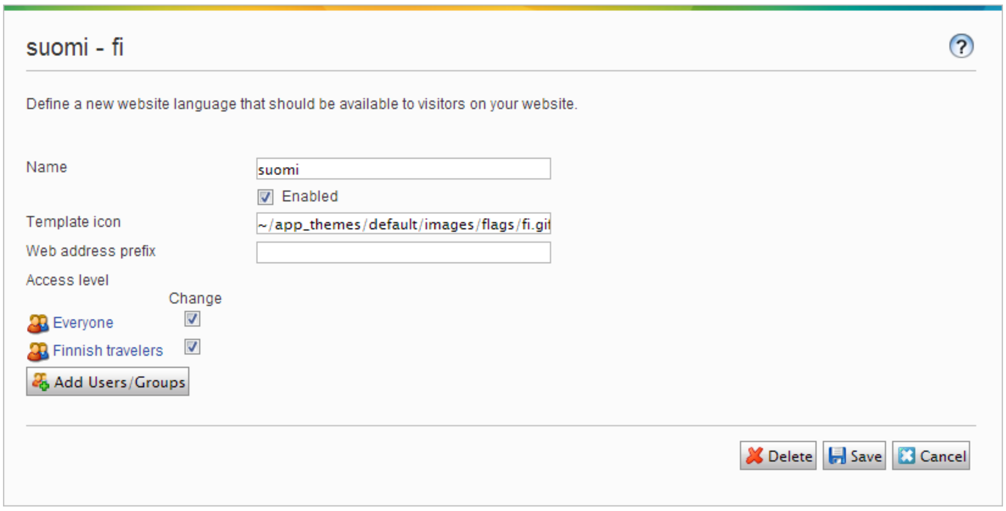
Create globalized content in the following steps:

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

Adding and editing a language

1. On the **Config** tab, select **Manage Website Languages**.

2. Click **Add Language**.



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

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

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

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

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

Changing the access level for a language

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

Change the access level for a language as follows:

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

Deleting an existing language

1. On the **Config** tab, select **Manage Website Languages**.
2. Click the language's name.
3. Click **Delete**.

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

Setting a language-specific property

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

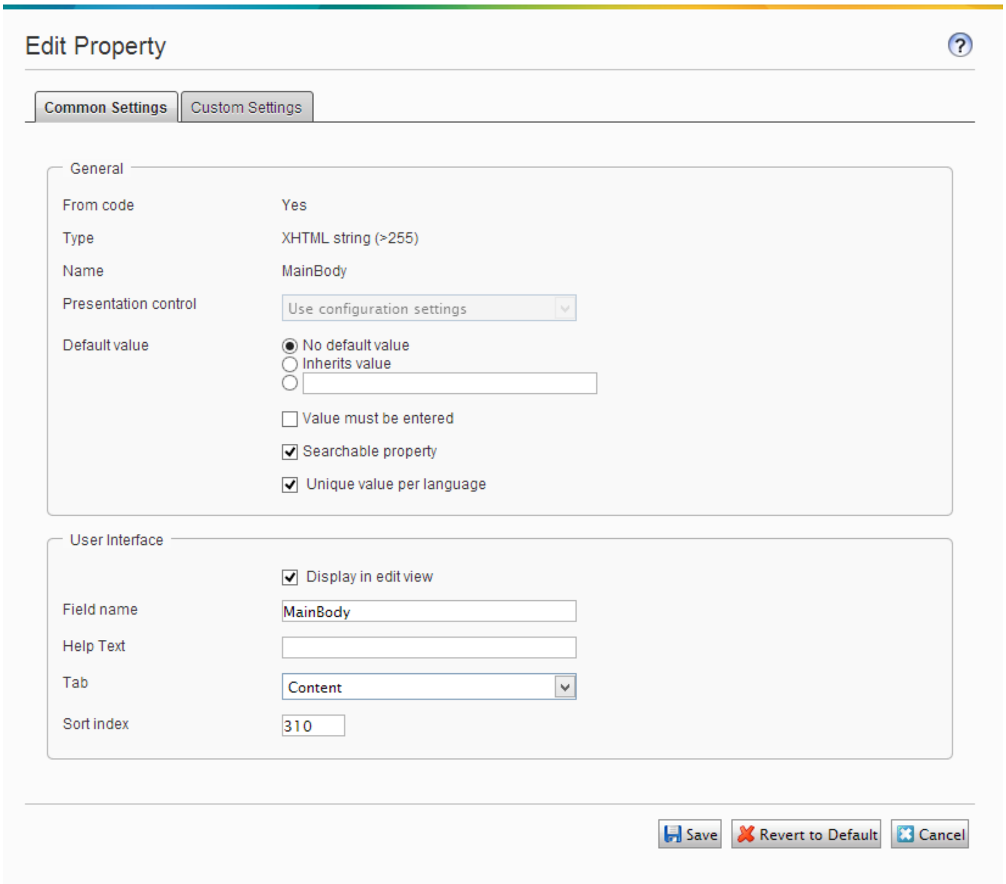
Properties that are set as a unique value per language are editable in all languages enabled on the website. This is normally the case, for example, in the property forming the rich-text editor, so that editors can enter content for the pages in the different languages. Properties that are not set as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

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

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

Set a property to be editable per language as follows:

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



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

Permissions for functions

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

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

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

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

Deleting permissions to a function for a group or user

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

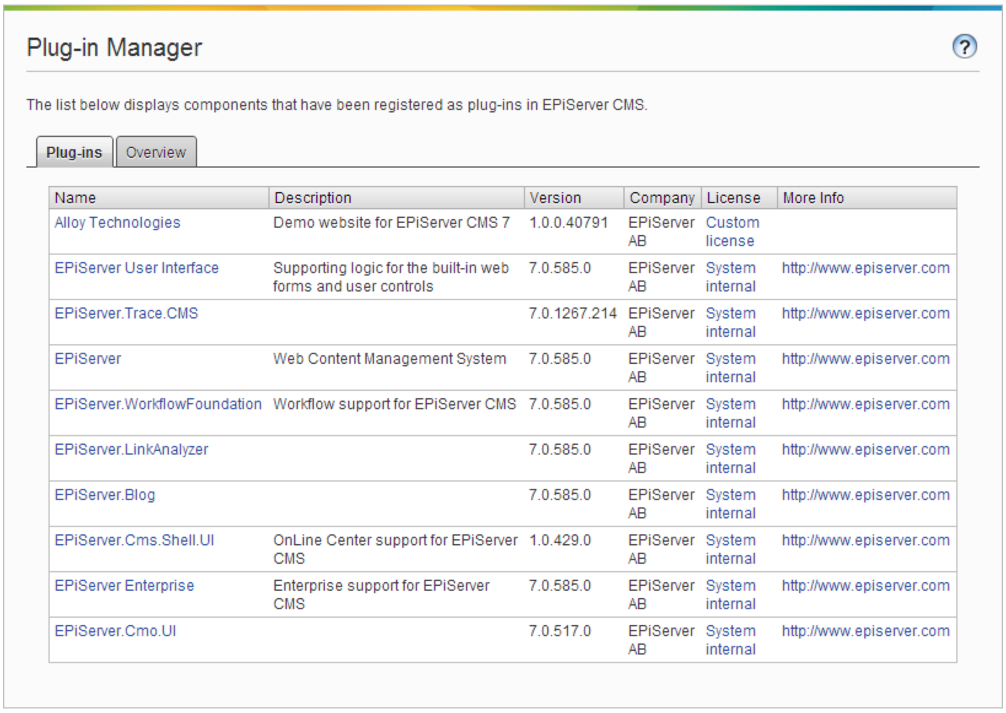
For more information on how to work with access rights for users, groups and pages, refer to the *Access rights* section in this documentation.

Tool settings

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

Plug-in manager

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


Plug-in Manager

The list below displays components that have been registered as plug-ins in EPiServer CMS.

Plug-ins | Overview

Name	Description	Version	Company	License	More Info
Alloy Technologies	Demo website for EPiServer CMS 7	1.0.0.40791	EPiServer AB	Custom license	
EPiServer User Interface	Supporting logic for the built-in web forms and user controls	7.0.585.0	EPiServer AB	System internal	http://www.episerver.com
EPiServer.Trace.CMS		7.0.1267.214	EPiServer AB	System internal	http://www.episerver.com
EPiServer	Web Content Management System	7.0.585.0	EPiServer AB	System internal	http://www.episerver.com
EPiServer.WorkflowFoundation	Workflow support for EPiServer CMS	7.0.585.0	EPiServer AB	System internal	http://www.episerver.com
EPiServer.LinkAnalyzer		7.0.585.0	EPiServer AB	System internal	http://www.episerver.com
EPiServer.Blog		7.0.585.0	EPiServer AB	System internal	http://www.episerver.com
EPiServer.Cms.Shell.UI	OnLine Center support for EPiServer CMS	1.0.429.0	EPiServer AB	System internal	http://www.episerver.com
EPiServer Enterprise	Enterprise support for EPiServer CMS	7.0.585.0	EPiServer AB	System internal	http://www.episerver.com
EPiServer.Cmo.UI		7.0.517.0	EPiServer AB	System internal	http://www.episerver.com

Change log

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

Changing the Change Log state

Change the Change Log state as follows:

1. On the **Config** tab, select **Tool Settings** > **Change Log**.
2. To change the change log, select any of the state options:
    - **Enabled** means that the Change Log system will start automatically when the site starts and will be available for read and write operations.
    - **Disabled** means that the Change Log system will not start when the site starts. Items written to the Change Log will be ignored but items may still be read from the Change Log.

- **Auto** means that the Change Log system will start as soon as any dependencies (such as a Mirroring Job) have been registered against the Change Log. If no dependencies exist the system will not start or will stop if already running.

Filtering the Change Log

Filter the Change Log as follows:

1. On the **View** tab, you can filter and view the change log items by entering one or several of the following values:

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

2. Click **Read** to run the query. A list of the matching change log items will then be displayed.

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

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

Rebuild name for web addresses

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

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

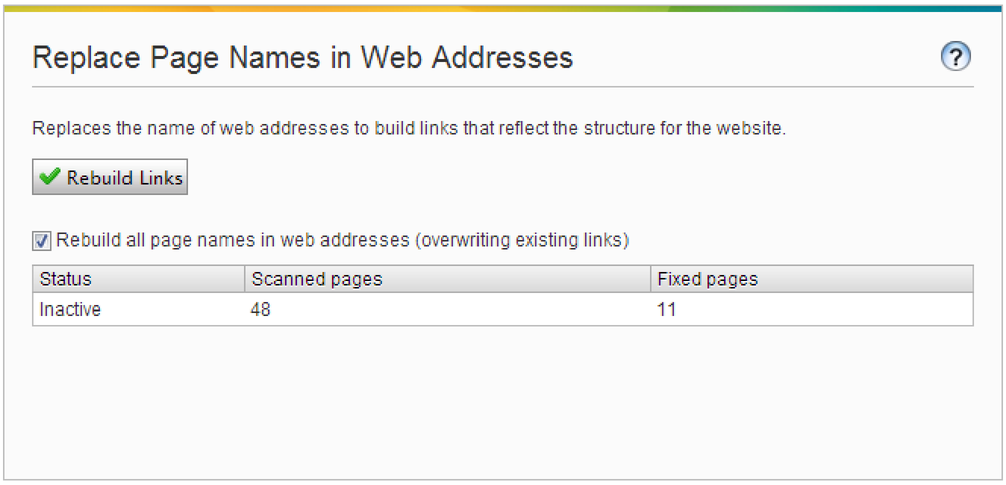
Some pages have no value in the field for names in web address. This could, for example, be pages imported from other EPiServer solutions. With the **Rebuild Name for Web Addresses** function you can create all the web addresses for the website at the same time. It is also possible to change all the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

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

Creating a rebuild name for web address

Rebuild names for web addresses as follows:

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



2. If you want to overwrite existing addresses, select **Rebuild all page names in web addresses**

(overwriting existing links).

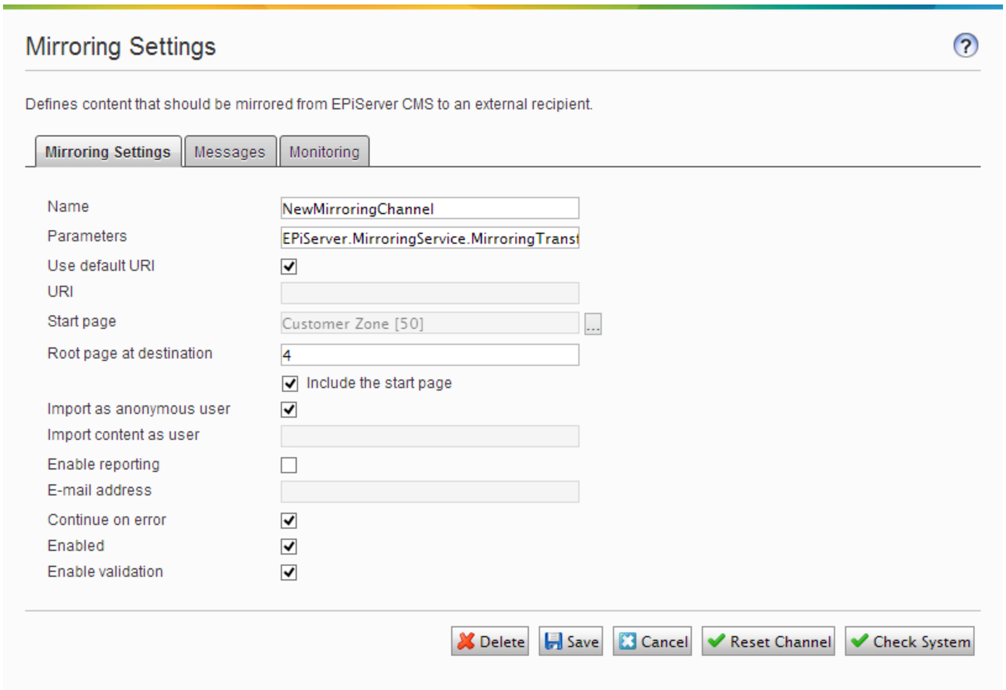
3. Click **Rebuild Links**.

Mirroring

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

The mirroring jobs are carried out at certain time intervals. You can define how often and when the mirroring will occur as described in *Scheduled jobs*.

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



Creating a channel

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

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

1. Click **Create** and enter the following information:
    - **Name**. Type an unique name for the mirroring channel.
    - **Parameters**. Optional field that can be used by providers. In this version there are one parameter which can be handled by the provider

EPiServer.MirroringService.MirroringTransferProtocol.WCF.MirroringTransferClient.TransferAction.
The **TransferAction** can have two options None and **ForceCurrentVersion**, by default 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, it updates the page on the target site.

- **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 will be disabled.
- **URI**. Enter the URI to the destination mirroring application's target service, for example http://localhost/Mirroring/Mirroring/MirroringTransferServer.svc. The service for the default provider is **MirroringTransferServer.svc**.
- **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 will be mirrored to.
- **Include the start page**. Determines if the start page will be mirrored or if only its children will be mirrored.
- **Import as anonymous user**. Determines if an anonymous user will do the export and import of pages and files when the mirroring job is run.
- **Import content as user**. Determines if an identified user will do 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 e-mail. When you select this option, the **E-mail address** field will become editable.
- **E-mail address**. Enter the e-mail address where the mirroring job report will be 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 will terminate as soon as an error occurs.
- **Enabled**. Select to enable the channel as active. If this option is not selected, nothing will be mirrored for the channel.
- **Enable validation**. Select to enable validation before items are mirrored. The mirroring job will validate that all page types for pages being mirrored are present in the target site and that the page type has the same number and type of page properties as the source site. By default the mirroring job checks all necessary page types and page definitions, which is included in the start page and its descendants.

2. After entering the values in the fields, click **Save**.
3. Continue with any of the following options:
    - **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 of this will be displayed under the **Messages** tab. Checks both the source and target site if all necessary parameters are correctly set up. Such as URI, Root page at destination, Mirroring Server binding, Access to DataBase and etc. See the section about synchronizing mirroring in *EPiServer CMS SDK > Developer Guide*.

- **Messages**. The result of a check system is listed in the **Messages** tab. Click the arrow to view the result and other information regarding previous mirroring jobs that have been run.
- **Monitoring**. The status of a mirroring job is displayed in the **Monitoring** tab.
- **Target Site Configuration**. To use a site as a mirroring target, some configuration is required.
- **Mirror Pages to a Target Site**. Create a target page in the editorial interface on the target site and create a page that will act as the root page for the mirrored pages. It is also possible to use an existing page as the mirroring root page. To publish pages, the mirroring application needs to be installed and configuration needs to be implemented.
- **Mirroring in Other Formats**. Mirroring in formats other than EPiServer CMS Import/Export format can be created by partners and customers themselves and plugged in using the provider model.

Editing a channel

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

Deleting a channel

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

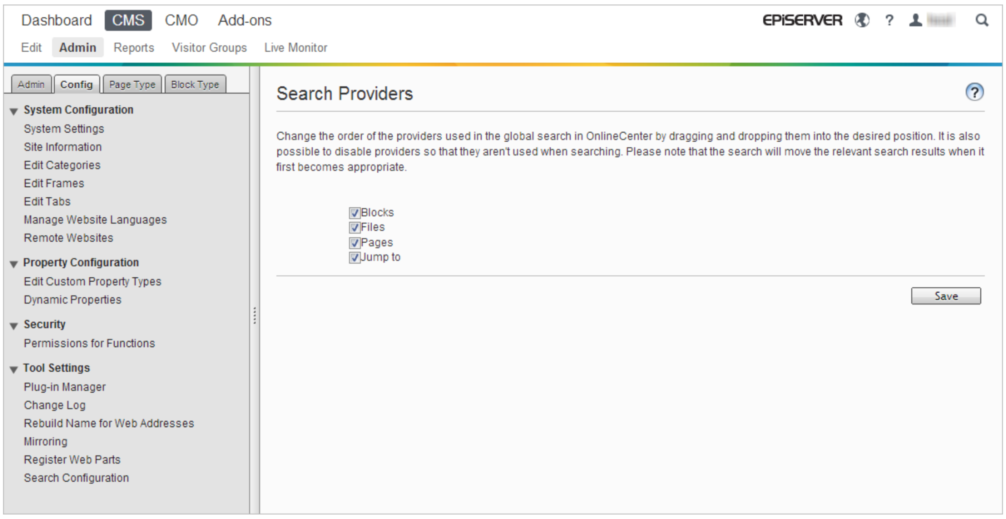
Search configuration

It is possible to configure different **search providers** for the modules in your website implementation. A search provider can search for instance pages, blocks, files, categories, forums or page types, or products in a commerce installation. The EPiServer CMS sample site comes with search providers for pages, blocks and files. Refer to the EPiServer Framework SDK for more information on how to configure additional search providers.

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

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

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


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

Properties

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

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

Properties can be defined either in ***code*** or from the administrative interface. For certain properties that are defined in code it is possible to do “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 about this will be displayed. If you do changes to a property defined in code, it is possible to reset the changes to the values that were defined in the code.

The following types of properties are used in EPiServer CMS:

- **Built-in properties** are set by the EPiServer CMS 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 by the developer in code or administrator from admin. For example, **Heading** and **MainBody**.
- **Dynamic properties** are set on page level and inherited by child pages.

For related information, see also *Content types for pages and blocks*.

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

For more information, refer to the **Content** > **Properties** section in the *EPiServer CMS SDK > Developer Guide*.

Editing and adding properties on content types

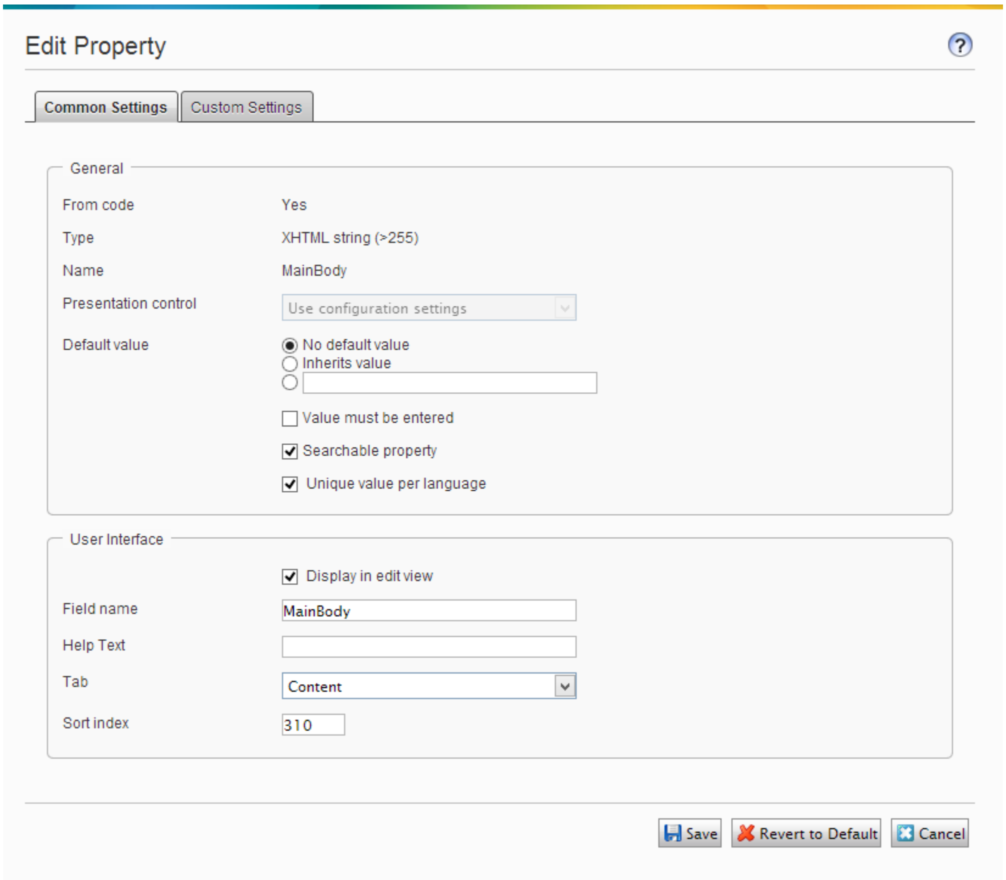
When editing and adding properties, the following tabs available:

- **Common Settings** is where you edit the common settings for the selected property.
- **Custom Settings** can be available depending on which property data type you are editing.

Editing a property

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

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



Adding a property

1. Select the page type where the property is to be added on the **Page Type** tab in admin mode and click **Add Property**.
2. In **Type** , select a property type. There are a number of different property types to choose from: integer, string, page, date, etc. It is also possible to create your own property types.
3. In **Name**, name the property. This is used when programming and making language settings.
4. Mostly the TinyMCE editor is used, and the **Presentation control** drop-down list appears dimmed. Use of multiple editors is supported. If your website is configured to allow multiple editors and you chose the property type ”XHTML String (>255)”, the **Presentation control** drop-down list will be enabled and you can select the XHTML editor you want to use. For more information about multiple-editor configuration, see the *EPiServer CMS SDK > Developer Guide*.
5. Select whether you want a default value for the property. This means that certain properties can have default values on all pages where it is used. Sometimes it is helpful to provide default field values. It is possible to specify the default values on both the individual fields and the default fields.
   a. Click the name of the property that you want to modify.
   b. In the **Default value** section you can choose not to specify default values, for it to inherit values or to specify a custom value.
6. Select whether the website content fields are to be searchable with the **Searchable property** check box. The search does not need to be carried out in all fields and it may be of benefit to remove certain fields from the search so that the search engine does not give hits on things

that may not affect the content on the page, for example, the Author field. As default, all the fields are searchable in the EPiServer CMS search engine. Exclude a certain field from the search as follows:

   a. Select the page type where the property to be searched is, on the **Page Type** tab.
   b. Click the name of the property that you wish to modify.
   c. Clear the **Searchable property** check box.

7. Select whether the field is to be unique for a certain language by selecting the **Unique value per language** check box. This is only the case if the website has activated support for globalization, see *Managing languages on a globalized website*.
8. Select whether the field is mandatory with the **Value must be entered** check box. It is possible to make fields mandatory so that editors must fill them in before saving the content. The setting is configured per property and content type. Editors that save a page without filling in the mandatory fields will receive a warning that the page cannot be saved until a certain field has been filled in. Set mandatory fields as follows:
   a. Select the page type that includes the property that you wish to enforce on the **Page Type** tab.
   b. Click the name of the property that you wish to modify.
   c. Select the **Value must be entered** check box.
9. Specify whether the field is to be visible in edit view with the **Display in edit view** check box. By default all the fields are visible in the editorial interface. You can hide fields in edit view so that editors cannot change the value that is saved for the property. The setting is configured per property and page type. Hide a field in the editorial interface as follows:
   a. On the **Page Type** tab, select the page type and locate the property you want to hide.
   b. Click the name of the property and clear the **Display in edit view** check box.
10. Specify a heading for the property in the **Field name** field. This text is displayed for the editor when editing the page in ***all properties editing view***, unless a translation of it has been added language resources.
11. Specify a help text in the **Help text** field. This text should be written to aid the editor in how to use this property, and will be displayed in ***all properties editing view*** when hovering over the field’s name.
12. Select the tab on which the property is to be displayed, in the **Tab** drop-down list.
13. When you are done, click **Save**.

The **Custom Settings** tab displays custom information for the selected type of property. This is for instance used when you want to configure available buttons in the rich -text editor, which is based on the property type “XHTML string (>255)”. Refer to the *Configuring the rich-text editor* section for more information.

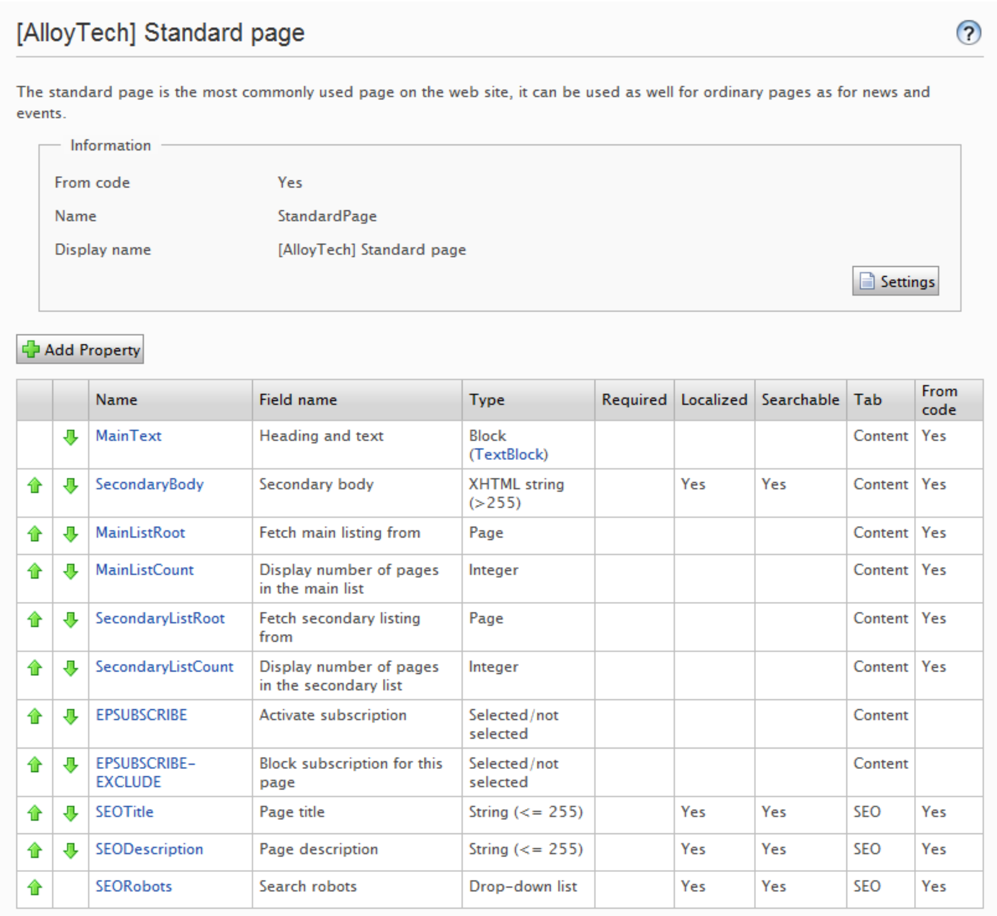
Note Blocks can only be created from code, and therefore this property type is not available when adding properties in admin mode.

Organizing properties in content types

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

Changing the field order

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



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

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

Selecting which tab a certain property is to be placed on

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

For more information on how to work with tabs, refer to *Edit tabs*. For more information about content types, refer to *Content types*.

Configuring property types

Property types to be used on pages, page types and block types are defined in code or in the admin view on the **Config** tab > **Property Configuration**. Consider this section as advanced administration done by developers, see the *EPiServer CMS SDK* > *Developer Guide*.

Properties can be created, named and given a data type and other settings. The editors only have to provide a value for the property in the editorial interface.

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

Built-in property types can be edited under the **Edit Custom Property Types** section. User-defined property types can also be created and named here.

Dynamic properties are added and edited under the **Dynamic Properties** section.

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

- **Name** is 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 reference in the SDK where you can find the class. A column left blank means that it is a built-in property.

The developer can create new **property data types** by inheriting from the existing ones, of which the following are available:

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 field in edit view.
Category	Category selection	List of categories.
LinkCollection	Link collection	A collection of links that can be added and edited in edit view.

Note Default values for properties are not defined in code.

Configuring the rich-text editor

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

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

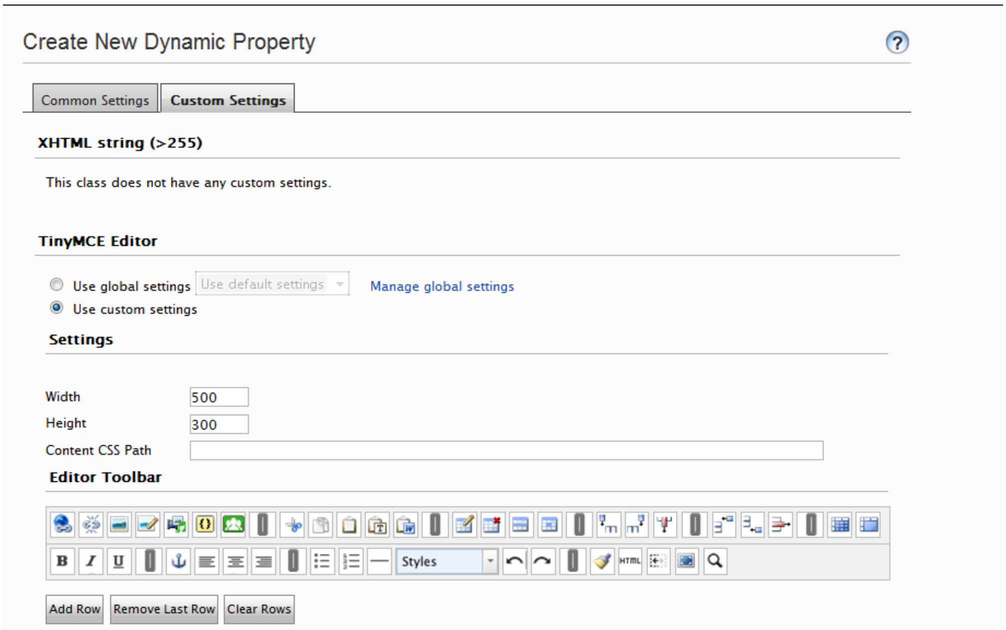
Here the integrated TinyMCE rich-text editor is described as it appears in a standard installation of EPiServer CMS, with a selection of functions being available. There are additional functions and customizations, which can be incorporated into the editor from admin view. Refer to the *EPiServer CMS SDK > Developer Guide* and the official *TinyMCE website* for further information about this.

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

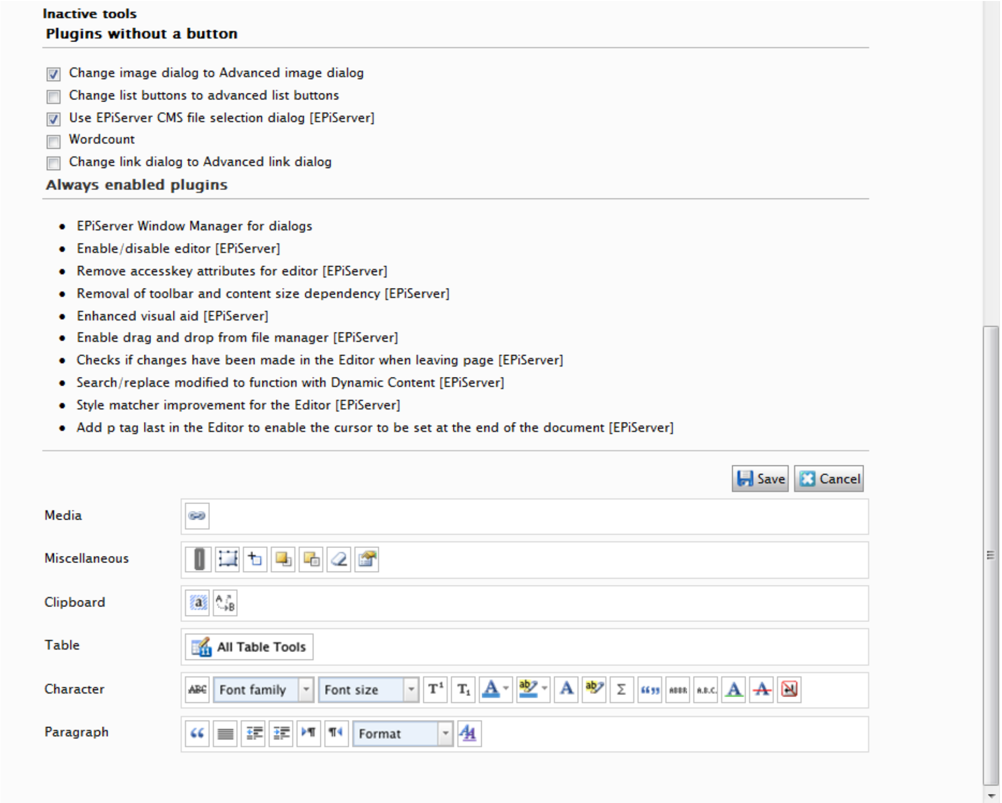
There are two kinds of settings used to change the layout and buttons available in the editor: **global settings** and **custom settings**. The layout of the editor toolbar is configured in the same way regardless of the type of setting.

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. The **Content CSS Path** field contains the path to the cascading style sheet that is to be used in the editor.
3. Configure the layout of the editor by dragging and dropping the icons that you want to be available from the editor toolbar designer to and from the **Inactive tools** section.
4. Remove an icon by dragging it from the toolbar designer and dropping it in the **Inactive tools** section. The icon will automatically be placed in the category to which it belongs.
5. Add an icon to the editor by dragging it from the **Inactive tools** section to the desired position in the toolbar designer.
6. Add and remove rows from the editor by clicking **Add Row** and **Remove Last Row**. The easiest way to clear all the icons from the toolbar designer and start from scratch is by clicking **Clear Rows**.
7. Configure the plug-ins to be used in the editor and click **Save**.



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



Enabling plug-ins

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

There are plug-ins that are always enabled in a standard installation of EPiServer CMS, of which some are the following:

- Enhanced visual aid
- Support for right-to-left languages
- Remove access key attributed for editor
- Enable/disable editor
- Removal of toolbar and content size dependency

Plug-ins without a button

The following plug-ins do not have a button enable functionality in the rich-text editor, and is not triggered by a toolbar button:

- **Change list buttons to advanced list buttons** enables a drop-down list with advanced types for nested lists, for example, 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 make it possible to configure advanced properties for your images.
- **Word count** enables the word count functionality. Select this option to add a **Words** field to the bottom right of the editor. This displays the amount of words included in the editor area.

Configuring global and custom settings

Global settings are used to change the layout and the buttons in the rich-text editor toolbar for a property and can either be used on all page types as a default or on only one page type. You can have as many global settings as you like on your website, making it possible to create an editor suitable for all editors working with the website. 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 will be based on this, unless stated that they should be based on another global setting or a custom setting.

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

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

Configuring global settings for a property on a page type

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

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

Configuring custom settings

Custom settings are used 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**.
3. The custom setting will now be used for this property on this page type alone.

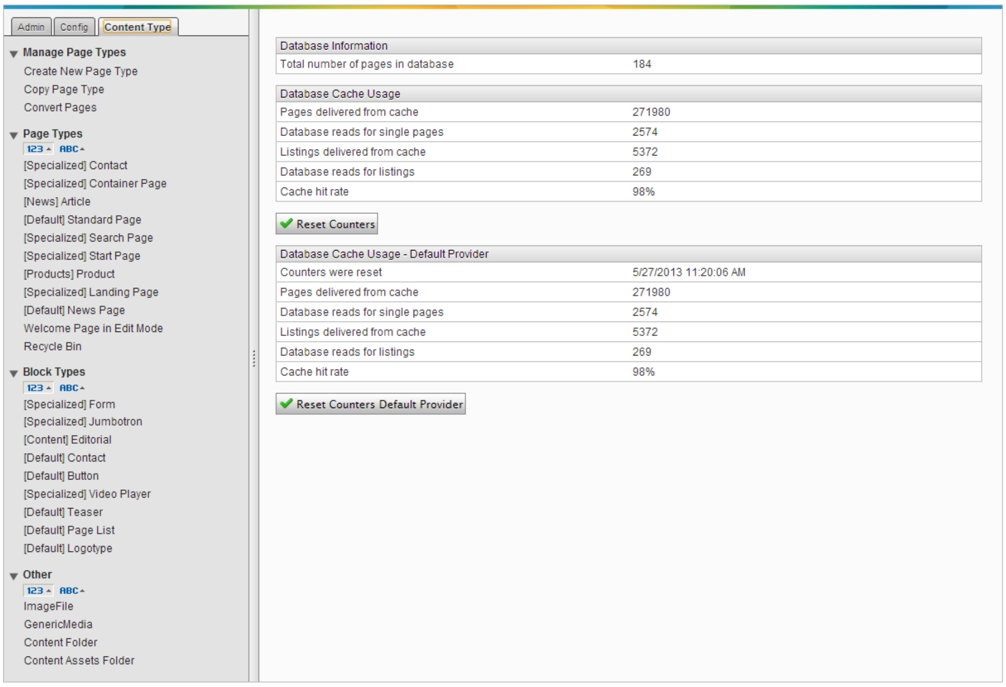
Deleting a global setting

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

Content types

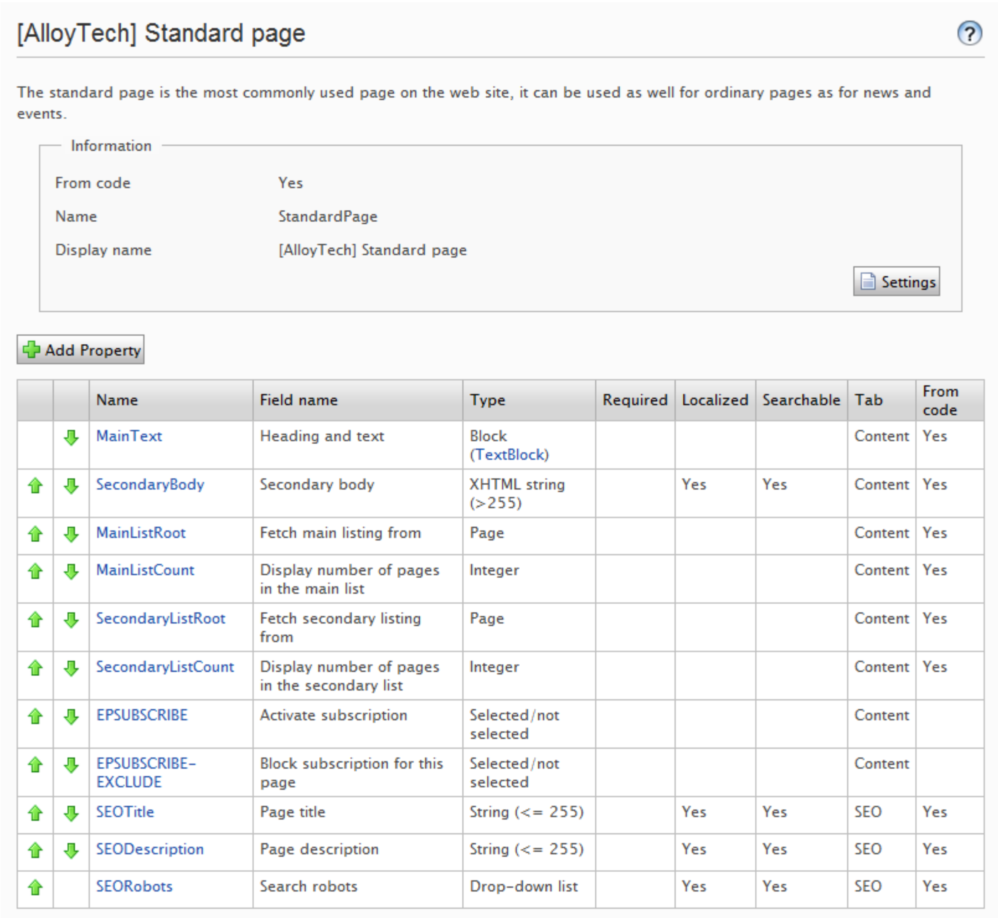
Content in EPiServer can be for instance of types pages and blocks, folders, or media files such as images and documents. Content can also be products in a product catalog in EPiServer Commerce.

Refer to the EPiServer CMS sample templates for examples of different content types listed under **Admin** > **Content Type** tab.



> ***Tip*** The list of available page types can be sorted according to either sort index or alphabetical sort order. Under the **Page Types** heading, click **123** to sort according to sort index, or **ABC** to sort alphabetically. This does not affect the page type list in the editorial interface.

Page and block types contain the **properties** where editors enter information, for example, 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

In a content type you define a set of properties that can hold information, for example, a link to an image or to a web page, or an editorial text. A typical EPiServer website has a set of content types that matches the identified functions that are needed on that particular website. The content type is the base/blueprint from which you create one or many page or block instances, for example, in the Alloy templates a Contact Card block type that has properties for address information, phone number, picture and perhaps a description, a Standard information page type with a large text block that supports HTML and a sidebar area displaying related information, and a News landing page type with the main news article displayed at the top and below that listings of other available articles. To display the content of a page or block to visitors, the page or block type and its properties need to be mapped to rendering **templates**, which can be for instance aspx files with associated code files, containing functionality required to perform a specific function.

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

Page templates can be associated with one or many page types by inheritance. Page types can be defined either in code or from the admin view.

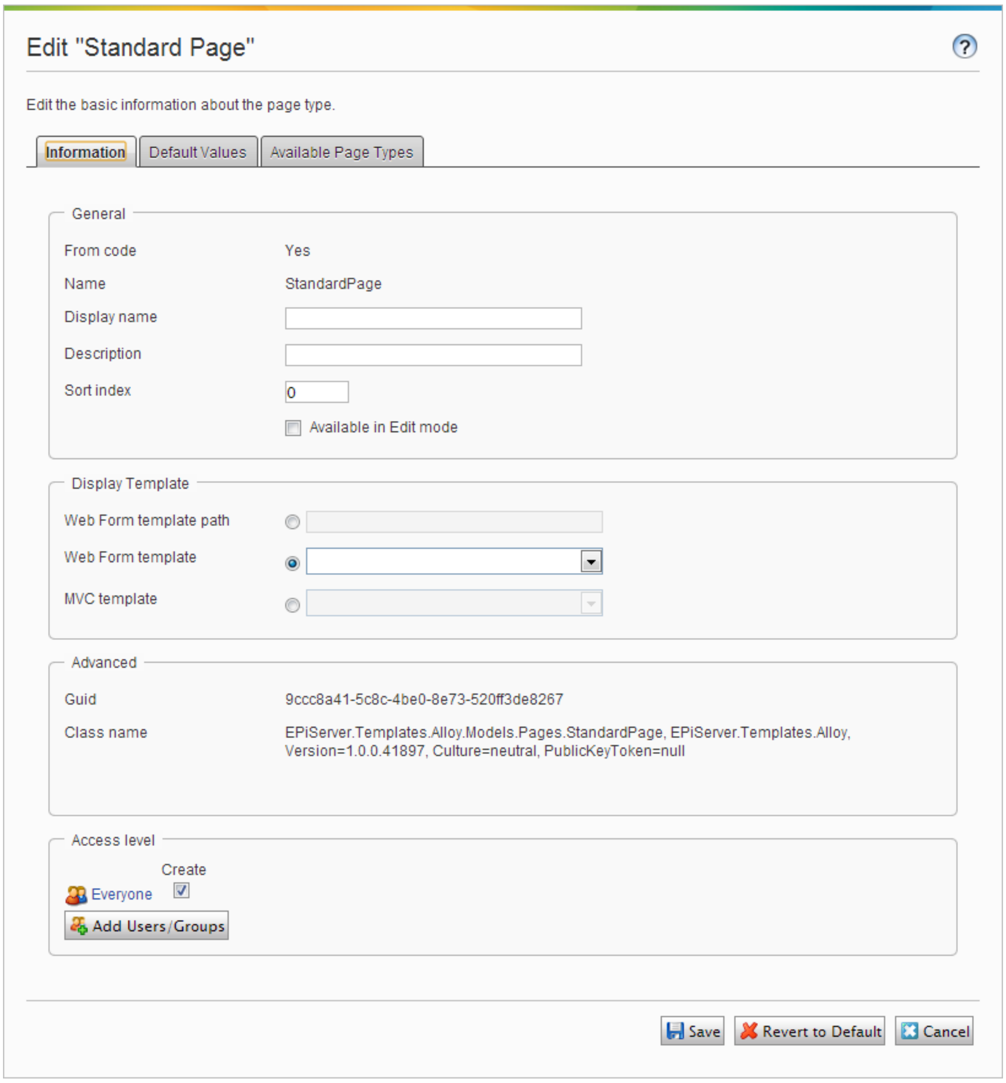
Block templates can be associated with one or many page types by inheritance. Block types can only be defined in code.

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

Page types

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

Editing a page type



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

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

Refer to **Creating a Page Types** below for more information about available settings for page types.

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

Creating a page type through copying an existing page type

Note You can create a new page type by copying an existing page type in admin view, but it is recommended that a developer creates it from code.

When you copy a page type, all of the properties are also copied, and 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**.
3. A window will appear containing the exact same properties and you can then edit the page type information to suit your requirements and click **Save**.

Creating a page type from admin view

Note You can create a new page type in admin view, but it is recommended that a developer creates it from code.

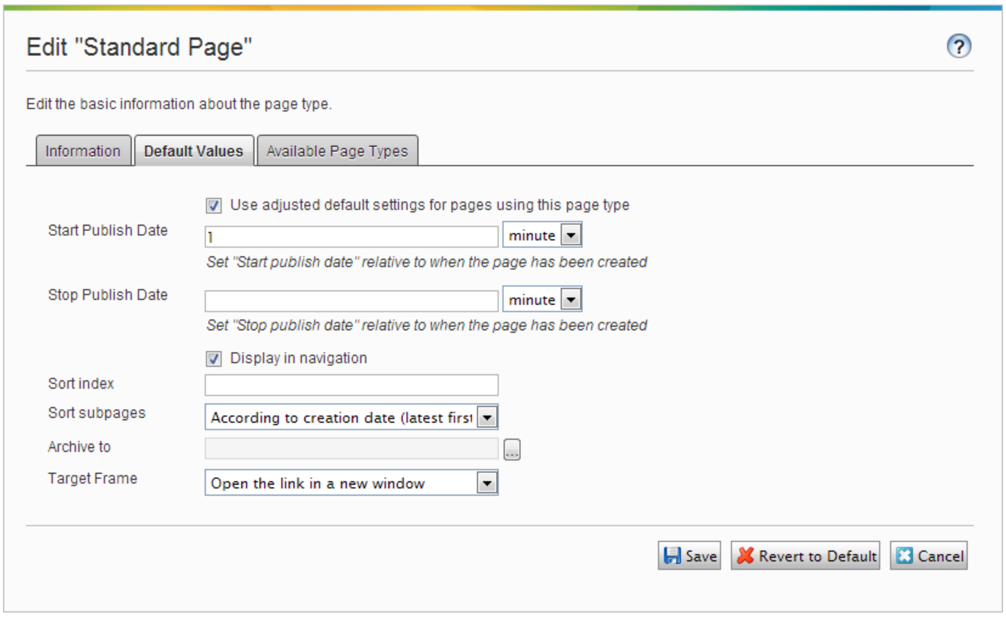
Create a page type from the admin view as follows:

1. On the **Page Type** tab, select **Create New Page Type**.
2. Under the **Information** tab, enter the following information:
   - **Name**. Enter the name of the page type here.
   - **Display name**. Enter the name that will be displayed in the list of available page types.
   - **Description**. The text describing the page type, will be displayed 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, the default value is 100.
   - **Available in edit view**. When selecting this check box, this option will make the page type available for selection when creating new pages in the editorial interface. It is recommended to hide page types that are rarely used by editors, for instance the start page type. These can made available when needed, and then hidden again.
   - **Display Template**. Select any of the following templates to be used for the page type:
     - **Web Form template path**. Select this option to enter a path to the aspx page template file to be used to display the content of the page.
     - **Web form template**. Select a specific Web Forms template that the page type is associated with. If your developer has created several templates using type classes, these will appear in the list.
     - **MVC template**. Select a specific MVC template that the page type is associated with. If your developer has created several templates using type classes, these will appear in the list.
   - **Registered template**. This option is useful when you want to use registered page templates for displaying content. The registered page templates will be available for

selection in the drop-down list. A page type can then be associated with predefined page templates to display the same content using different channels.

- **Advanced information**. Displays information about the GUID, class name and assembly name for the page type.
- **Access level**. Determines the users and user groups for which the page type will be available when creating new pages. The default setting is **Everyone**, meaning that it will be available to all users and groups. Do the following to limit access rights for a page type:
    a. Click the **Create** check box to clear the access level setting for **Everyone**.
    b. Click **Add users/Groups** and select the relevant users or groups., click **OK** when done.
    c. Make sure that the **Create** check box is selected for the desired users and groups and click **Save**.

3. Click **Save**, or **Revert to Default** if you want to restore your settings.
4. Go to the **Default Values** tab. It is possible set default values for some of the built-in properties in EPiServer CMS from admin view. Default values for the properties can also be specified from code, but these are not visible in the admin view.



Change the following properties default values:

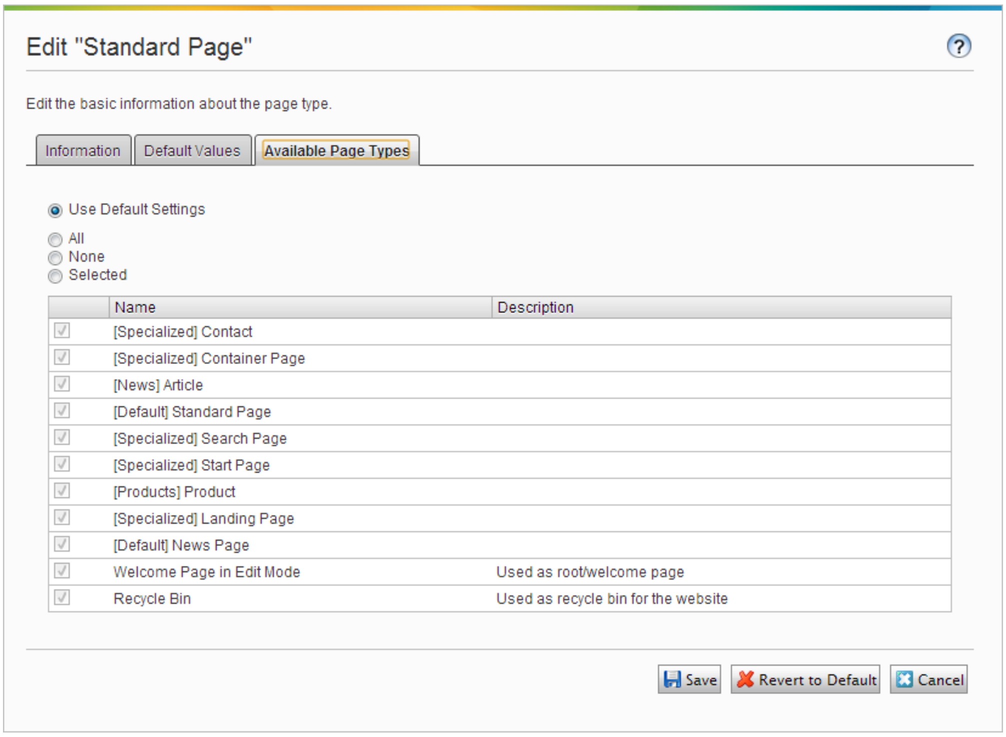
a. Specify the default values for the desired properties.
    - **Start Publish Date**. Select the **Use adjusted default settings...** and the value in time when the system should publish the page after it has been created. Mostly used for news pages that are available on the website for a short time.
    - **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 never should be displayed in menus for navigation. This is done

by clearing the **Display in navigation** property, which will then be 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 where you want the pages to be archived to. Then you can run a scheduled job to clean up the 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.

b. Click **Save**, or **Revert to Default** if you want to restore your settings.

5. Go to the **Available Page Types** tab. When creating new pages it is recommended to limit the available page types in the page type list, to make it easier for editors to chose the correct page type. For a “News List” parent page, you can for instance define that the only available page type should be “News Item”.

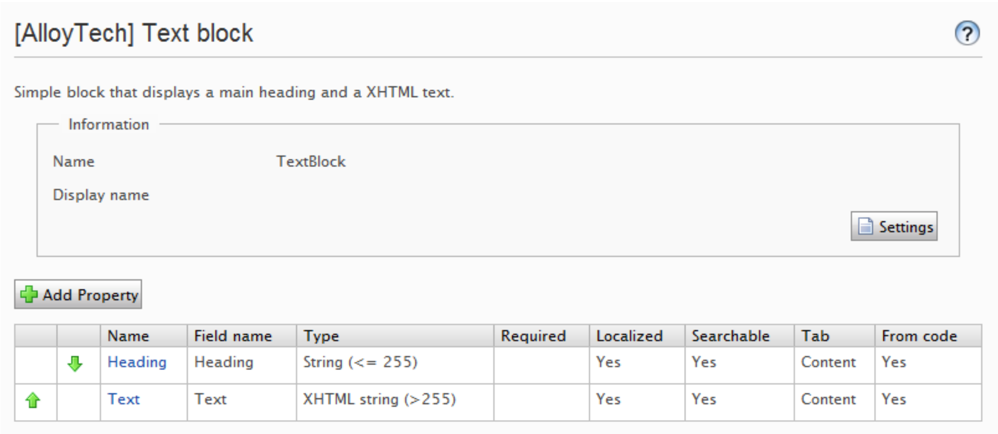


Define the desired page type by selecting any of the following options:

- **Use Default Settings**. Select to revert to default settings as defined in code for this page type.
- **All**. Possible to create pages based on all page types available in edit view.
- **None**. Not possible to create child pages for this page type.
- **Selected** . Manually select the page types that should be available.

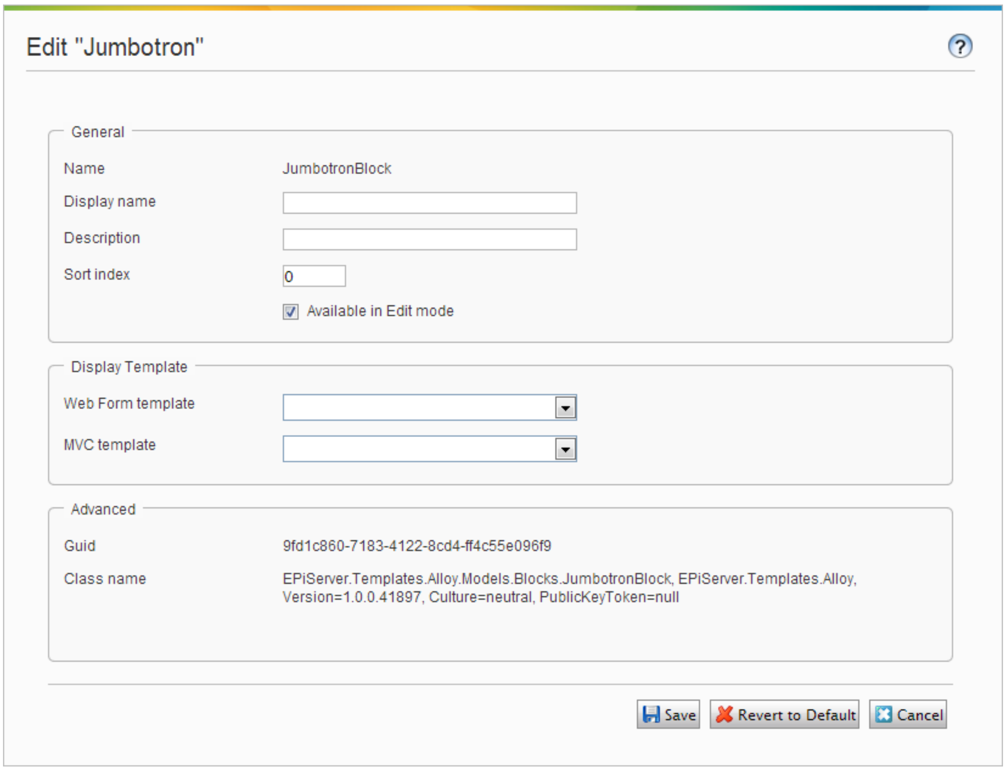
6. Click **Save**, or **Revert to Default** if you want to restore your settings.

Block types



Editing a block type

Block types have some of the settings in common as for page types. You can change some of these settings from the admin view.



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.

> ***Note*** Some block type settings are defined in code and cannot be changed from admin view.

Creating a block type

> ***Note*** Block types are currently created in **code** and cannot be created from admin view like page types.

Other content types

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

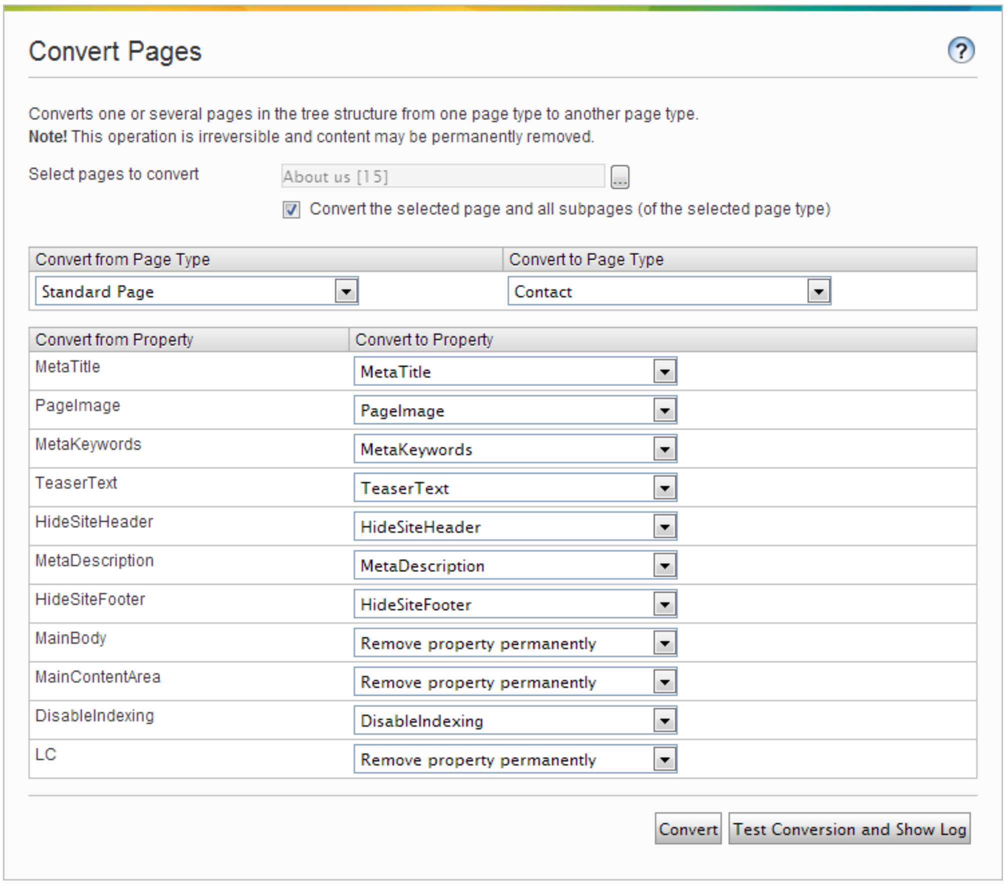
Convert pages

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

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

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

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



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

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

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

Administering visitor groups

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

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

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

Available visitor group criteria

On the EPiServer CMS sample site the following set of criteria are available:

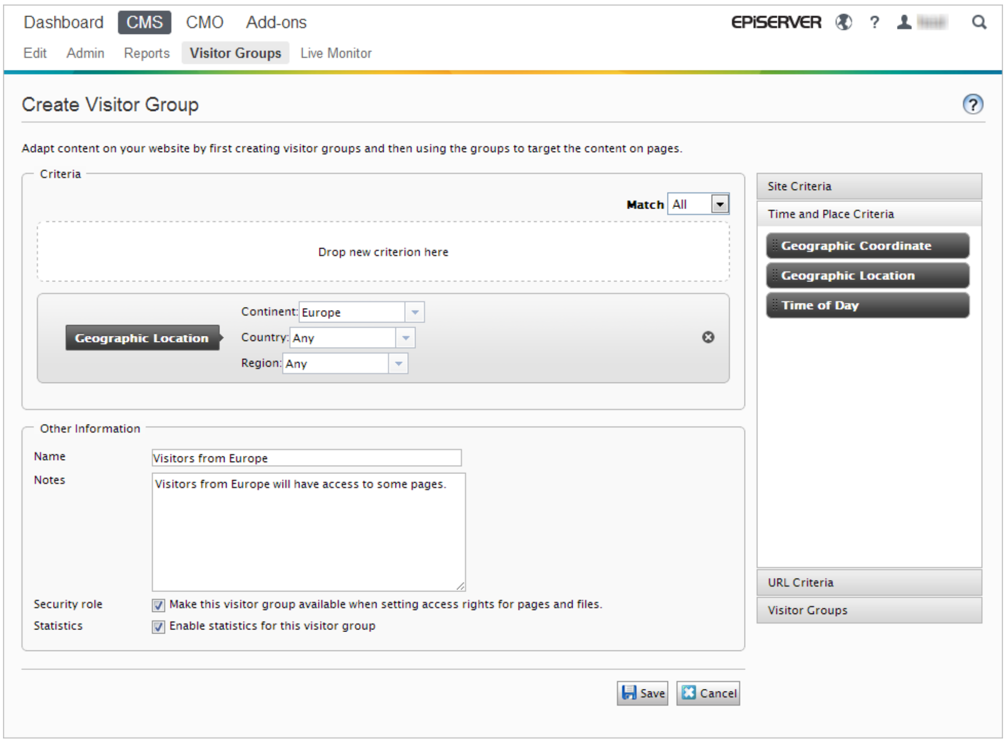
- **Site Criteria**
  - **Number of Visits** will match the number of times the visitor has visited the website.
  - **User Profile** will match a value stored in a user’s profile. When adding this criterion you can specify that to be part of this group the user has to have a specific value for a specific profile setting. You can decide if the user profile property should match on equal, contain, start with, or end with a specified value.
  - **Visited Category** lets you select one of the page categories on the website. You can also select how many different pages that use the specified category the visitors have visited. The visitor must have visited the specified number of pages that has the specified category set on it.
  - **Visited Page** will let you select one specific page on the website. The visitor must have visited the specified page during the current session.
- **Time and Place Criteria**
  - **Geographic Coordinate** will look up the visitor’s approximate location in a geolocation database (based on the visitor’s IP address). Drag the marker and drop it on the map (Google Maps), and select a radius around that point to match the visitors location to the selected location.
  - **Geographic Location** will look up the visitor's approximate location in a geolocation database (based on the visitor’s IP address) and match their location to the selected location. You can match the visitor to a specific continent, country and region. It is also possible to specify a wild card for country and region.
  - **Time of Day** will match the visitors time period with the start time, end time, and weekdays you have specified.
- **URL Criteria**
  - **Landing URL** will store the URL that the user enters the site with. You can decide if the landing URL should match on equal, contain, start with, or end with a specified value.

  - **Referrer** will store the URL of the referred page that was clicked before entering the site, for example, the URL of a search engine result page. You can decide if the referrer criteria should match on equal, contain, start with, or end with a specified value for the whole URL or parts of it.
  - **Search Keyword** will store the URL of the referred page that was clicked before entering the site, for example, the URL of a search engine result page. This criteria can be defined by your partner developer to specify the search word to match against the URL by a regular expression. The regular expression then finds the search words in the URL from the most common search engines on the market, for example Google, Yahoo, and Bing.
- **Visitor Groups**
  - **Visitor Group Membership** let you select members from one or several existing visitor groups.

Creating a visitor group

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

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



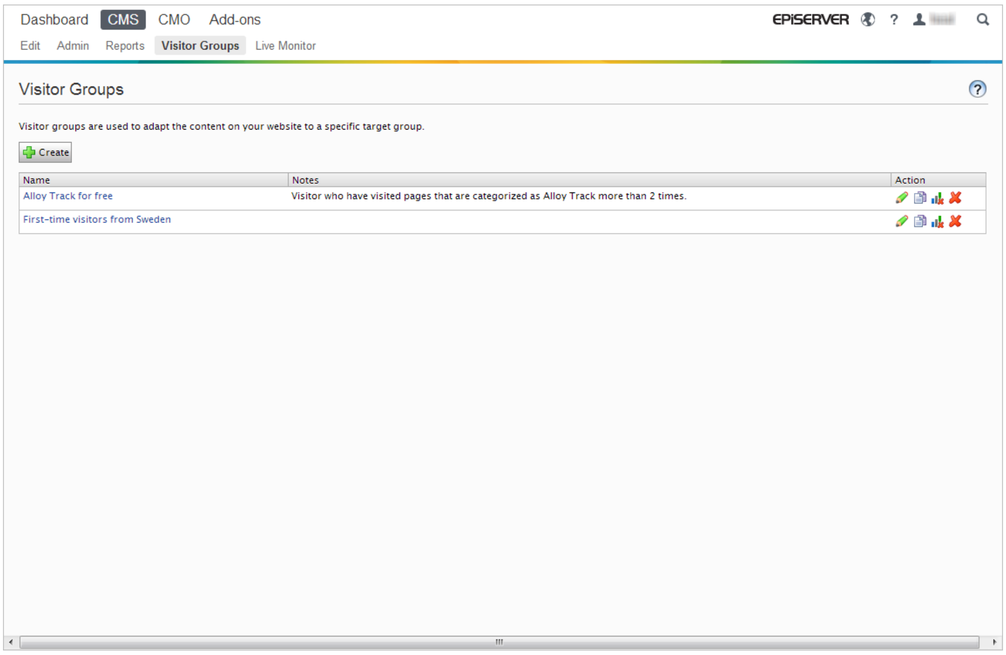
3. In the **Criteria** section, click to add one or several criteria for each visitor group as follows:
   a. In the **Match** drop-down list, select the criteria to match **All**, **Any** or **Point**. What you select here will affect all criteria for the visitor group. Using points is a way to set a value for what an desired action on the website is worth.
   b. Drag the criteria you want from the pane on the right and drop it into the **Drop new criterion here** area.

4. Make the settings for the criteria, see examples described in *Examples of creating visitor groups*.
5. In **Name**, name the visitor group you have created. This name will be displayed in the personalized content box when you select the content on a page.
6. In **Notes**, type a descriptive text about the visitor group you have created, for example, its purpose. This description will be displayed as a tooltip when the editor is adding a visitor group to the content on a page.
7. In **Security Role**, select the check box if you want this visitor group to be available when setting access rights for pages and files in admin mode. Note that visitor groups will only have read access.
8. In **Statistics**, keep the check box selected to enable statistics for the visitor group (this check box is selected by default).
9. When you are done, click **Save**.

Changing a visitor group

Change a visitor group as follows:

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



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

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

Copying a visitor group

Copy a visitor group as follows:

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

Deleting a visitor group

Delete a visitor group as follows:

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

Viewing and clearing statistics

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

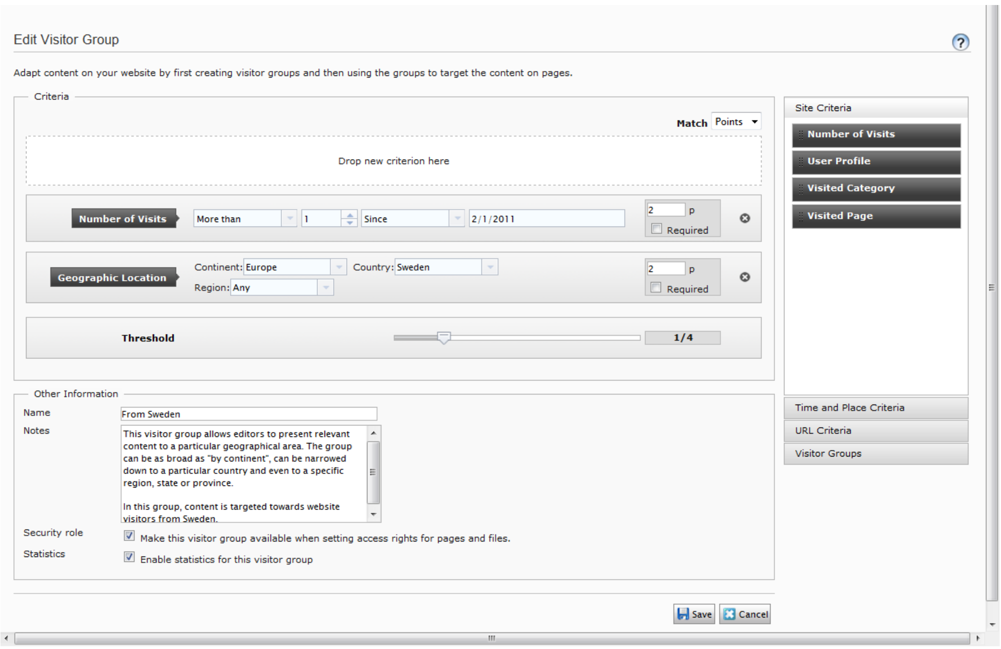
1. Select the **Visitor Group** tab.
2. Click the **Clear statistics** button .
3. Confirm the deletion.

> ***Note*** The clear statistics action takes effect immediately, and are permanently deleted from the database. This action cannot be undone.

Examples of creating visitor groups

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

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, visitors who has visited the page before from a certain date will match the criteria for this visitor group.

1. In the **Match** drop-down list, select the criteria to match **Point**.
2. Drag and drop the **Visited Page** 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 never has visited the page before, select instead **Less than** > **1** > **Since [date]**.
4. Enter the number of points each criterion is worth, and select whether the criterion is required or not.
5. Select **Threshold** for the criteria you have added in your visitor group, for example, that the visitor must fulfill 1 of 3 criteria to be included in the visitor group.
6. Save the visitor group.

Geographic Location

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

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

Geographic Coordinate

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

1. Drag and drop the **Geographic Coordinate** criteria, and click **Select Location**.
2. Select location by clicking the map you want to include in the geographic coordinate and click **OK**.
3. Select the **Radius [number of kilometers or miles]**.
4. Save the visitor group.

Referrer

The HTTP Referrers is based on pages, for example, used in a campaign. For example, you can target the content for visitors searching for “episerver and cms” on Google.com and clicking the link to EPiServer’s landing page from the search engine result page.

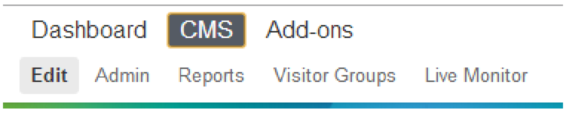
1. Drag and drop the **Referrer** criteria, and select **URL** > **Equals** > the URL of the search engine result page, for example, http://www.google.se/#hl=sv&source=hp&biw=1338&bih=790&q=episerver+cms.
2. You can also add the **Geographic Location** to select a specific country.
3. Save the visitor group.

EPiServer platform

Introduction

The **EPiServer platform** with OnlineCenter is the common framework used by EPiServer products, containing features available with all product installations. OnlineCenter offers an overview with easy access to all installed systems. From here you can also access the online help, perform global searches, and customize your settings.

The **global menu** at the top holds the navigation for all systems integrated with your website. This is a plug-in area which can also be used to provide access to third-party products integrated with EPiServer products.



The upper left part of the global menu holds the following options:

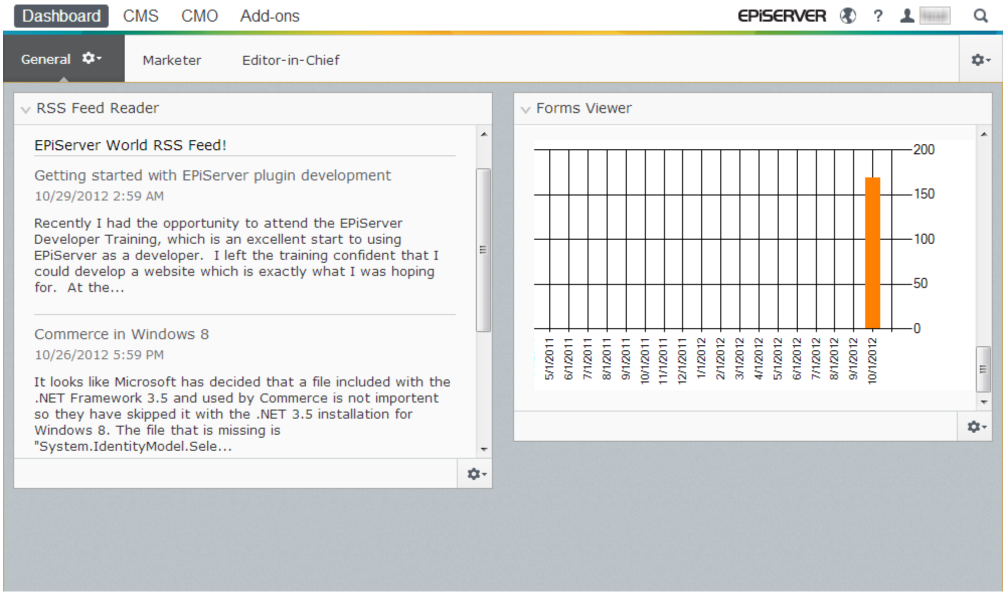
- **Dashboard** features a customizable area where you can add gadgets for quick access to common tasks or other activities on the website. A **gadget** is a small application that can be made available for easy access from the **Dashboard** in EPiServer OnlineCenter and the **assets pane** and **navigation pane** in EPiServer CMS and EPiServer Commerce. There are gadgets available both for the EPiServer platform as well as product-specific ones, for example gadgets for forms viewing, visitor groups statistics, version management and the product catalog in Commerce. Developers can create customized gadgets for specific purposes, see *EPiServer Framework SDK*.
- **[Products]** features the system interface for the various products in your installation where you manage the content on your website, for example, text and images on web pages in EPiServer CMS and products in EPiServer Commerce. Depending on which system you select in the menu, the submenu on the second row will change to display the functions for that specific system. Please refer to the relevant product-specific documentation.
- **Add-ons** provides access to the EPiServer Add-on Store where system administrators can manage plug-ins and upgrades for both EPiServer and third-party modules.

The upper right part of the global menu holds the following options:

- EPiServer logo takes you to www.episerver.com.
- **?** provides access to the online help for the various products in your installation.
- The earth globe symbol provides view options for the websites.
- The user profile symbol provides access to personal system settings, license agreement and to log out from the website.
- The magnifier symbol allows you to perform a *global search*.

Dashboard

The **Dashboard** is a personal area used for aggregation and display of important website information. The dashboard is also a plug-in area where you can add customized gadgets for presenting highlevel information or provide quick access to common tasks or frequently used features. It can be for instance viewing recently changed pages or monitoring a web form.



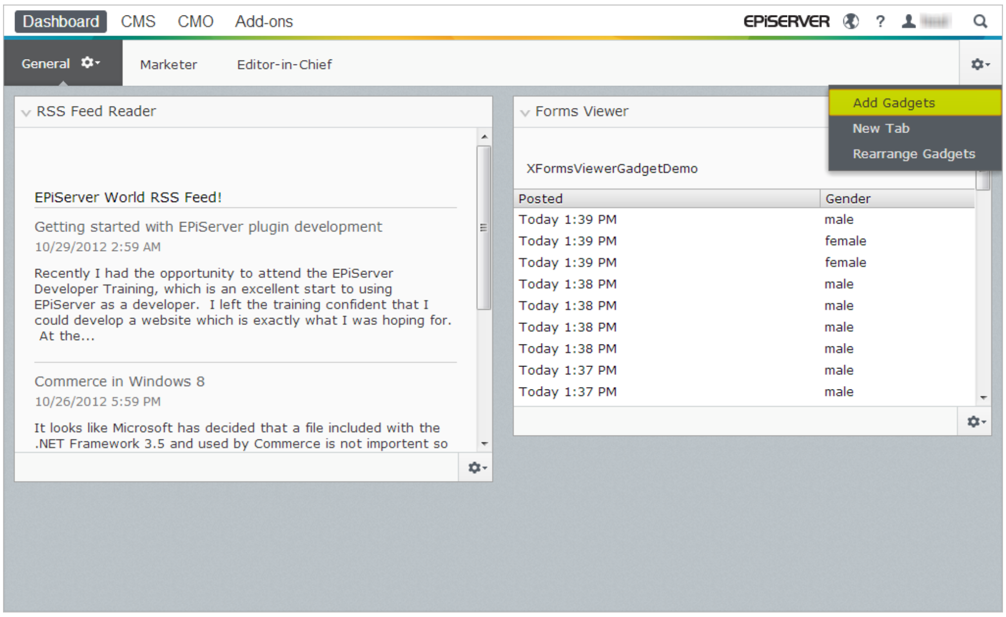
When logging in to the website, the dashboard can be accessed by selecting **Go to my Dashboard** in the EPiServer log in dialog, or from the **Dashboard** option in the global menu.

You can do the following when working with the dashboard:

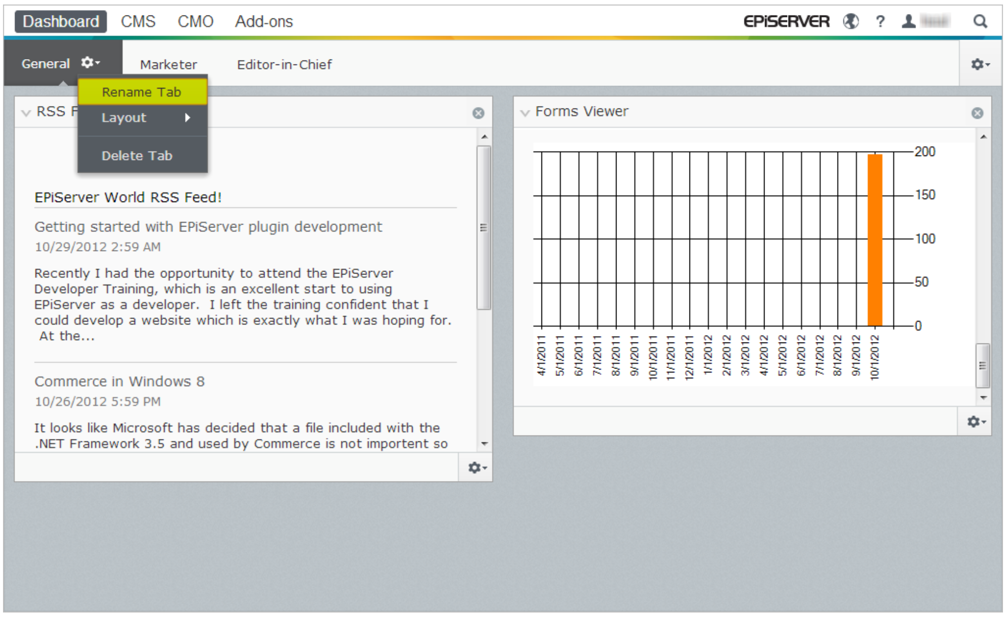
- **Organizing the dashboard**. Adding, editing and deleting tabs and columns. You can divide the layout of the dashboard tabs into one, two or three columns, depending on your choice.
- **Gadgets**. Organizing gadgets in columns and under tabs. Adding, editing and deleting gadgets, see *Gadgets*.

Tabs

Tabs are used for organizing the dashboard information. You can create your own tabs, and add gadgets of your choice. You can for instance have one tab for the marketing team, and one for product editors, with specific gadgets available for each of these groups. You can customize the layout of each tab by setting the number of columns for displaying information. There will always be at least one default tab available in the overview.

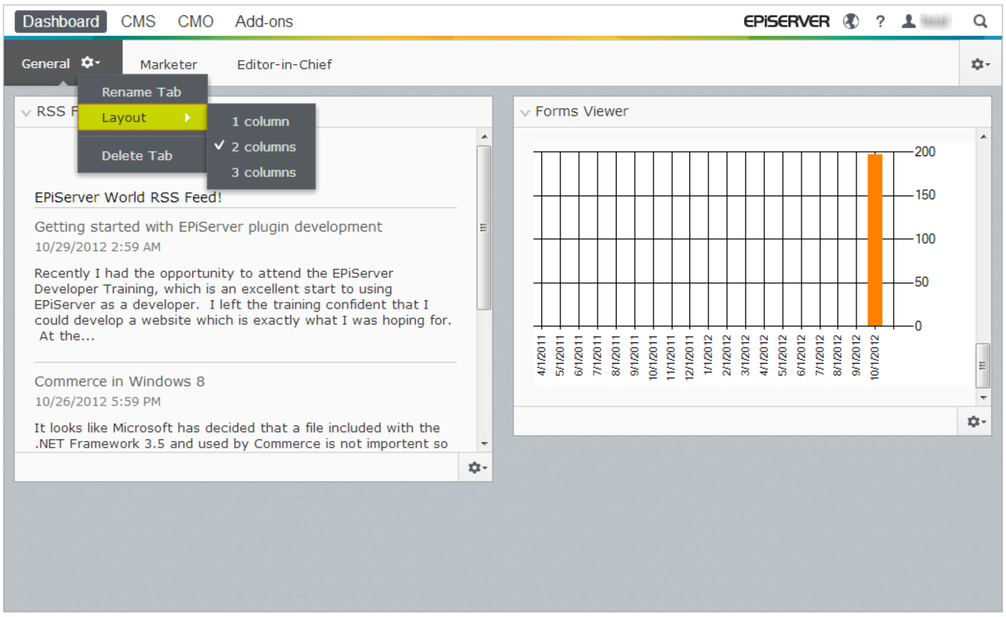


Creating Tabs



Add a new tab on the dashboard as follows:

1. Select **New Tab** from the dashboard menu.
2. Select **Rename Tab** in the drop-down list for the tab you want to add and type a name for the tab.
3. In **Layout**, define how many columns the tab information area will have by clicking one of the available options.
4. Add the gadgets you want to the tab you have just created as described in *Adding a Gadget*.



You cannot change the order of tabs after they have been created.

Editing Tabs

Edit a tab on the dashboard as follows:

1. Click the arrow for the tab you want to edit. You have the following options:
   - Select **Rename Tab** to change the name of the tab.
   - Select **Layout** to change the number of columns on the tab. All existing gadgets will be moved to available columns in the new layout.
2. Select **Save** to save your changes.

Deleting Tabs

Delete a tab from the dashboard as follows:

1. Click the arrow for the tab you want to delete.
2. Select **Delete Tab** in the drop-down list for the tab you want to delete.
3. Select **Yes** to confirm the deletion.

There must always be at least one tab available on the dashboard, which means that the last remaining tab cannot be deleted.

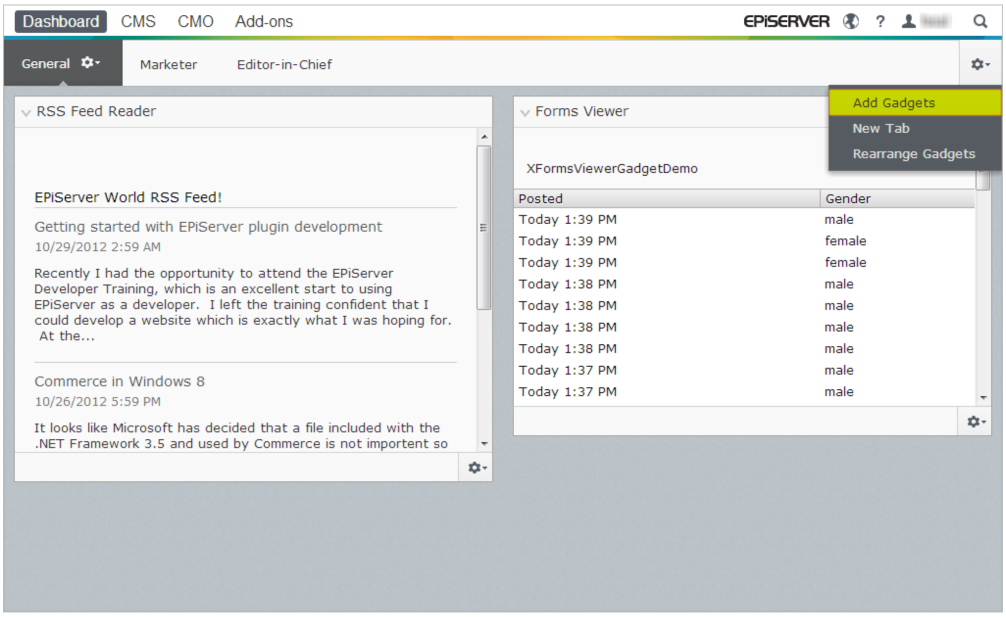
Gadgets

A **gadget** is a small application that can be made available for easy access from the **Dashboard** in EPiServer OnlineCenter and the **assets pane** and **navigation pane** in EPiServer CMS and EPiServer Commerce. There are gadgets available both for the EPiServer platform as well as product-specific ones, for example gadgets for forms viewing, visitor groups statistics, version management and the product catalog in Commerce. Developers can create customized gadgets for specific purposes, see *EPiServer Framework SDK*.

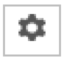
Each gadget has a drop-down menu in the upper right corner. What you see in the menu depends on the functionality available for the gadget, but you will most often find at least the **Edit** and **Delete** options here.

You have the following options:

Customizing your gadget settings



You can customize your settings on the panes by adding, moving and deleting gadgets. You have the following options:



Pane settings. Click the cogwheel symbol to open a menu with gadget options, for example, add gadgets to the pane.

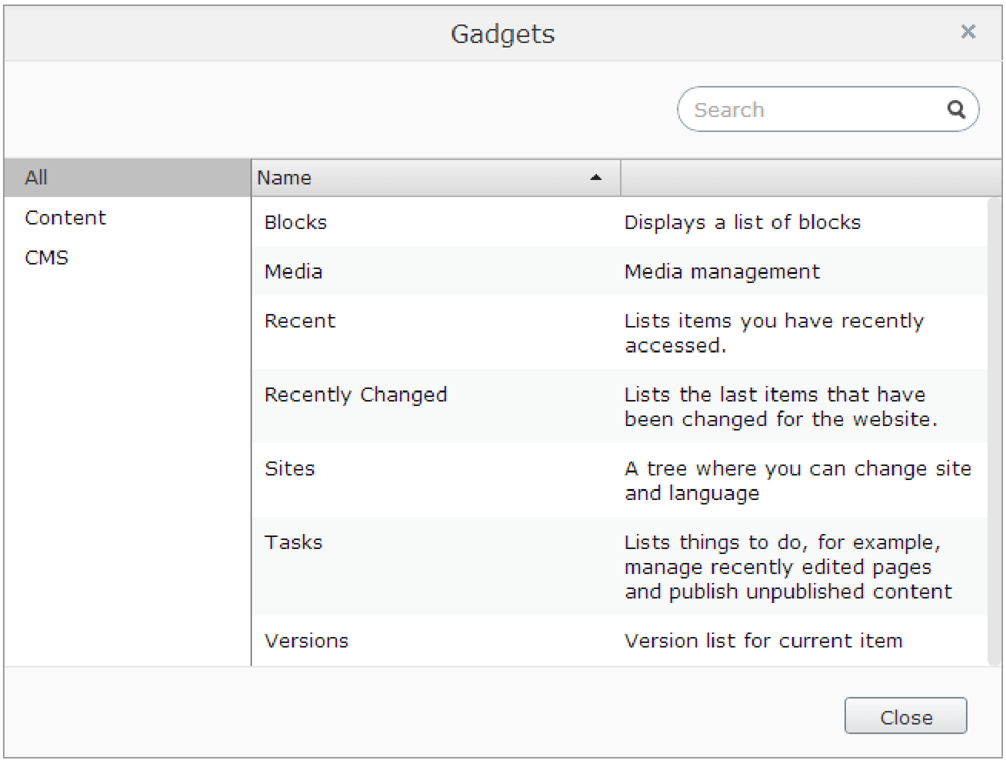
Gadget settings. Click the arrow next to the cogwheel symbol to select options for the specific gadget, for example, remove the gadget from the pane.

Gadgets options. Click the arrow to select options for the specific gadget.

Toggle minimize and maximize gadget. Click to minimize and  to maximize the gadget.

Remove. Click to remove a gadget.

Adding a gadget



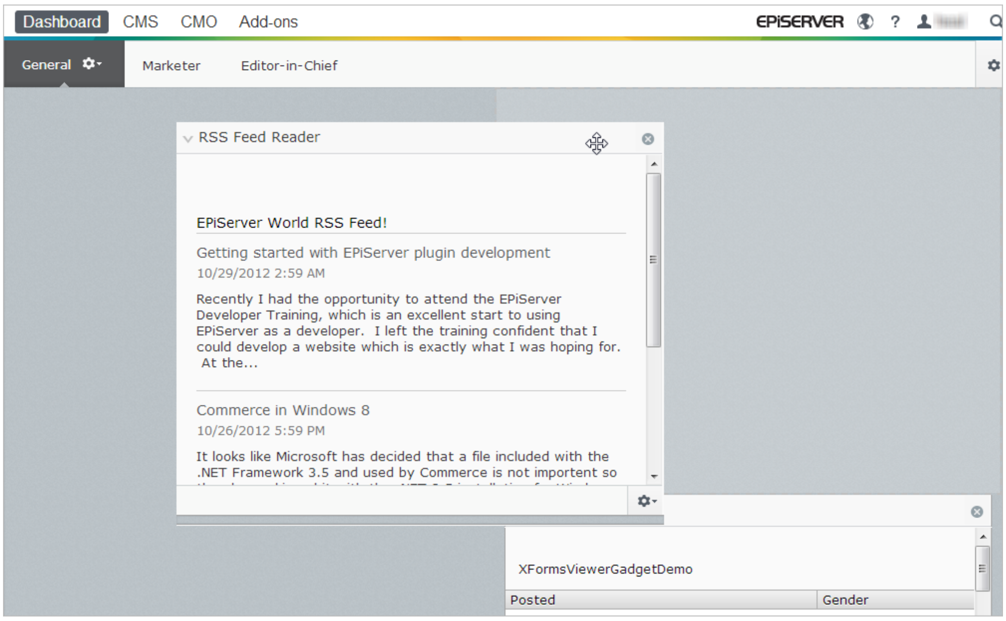
Add a gadget to the pane as follows:

1. Click **Add Gadgets**.
2. The **Gadgets** window shows a list with all gadgets. By clicking the product name to the left, you can filter product-specific gadgets.
3. Click the plus symbol for the gadget you want to add. If you select several gadgets, they are added on the pane in the order you have selected them.
4. Click **Done**.

Moving a gadget

The dashboard and panes are locked by default. You can organize these areas by moving gadgets around and placing them where you want them.

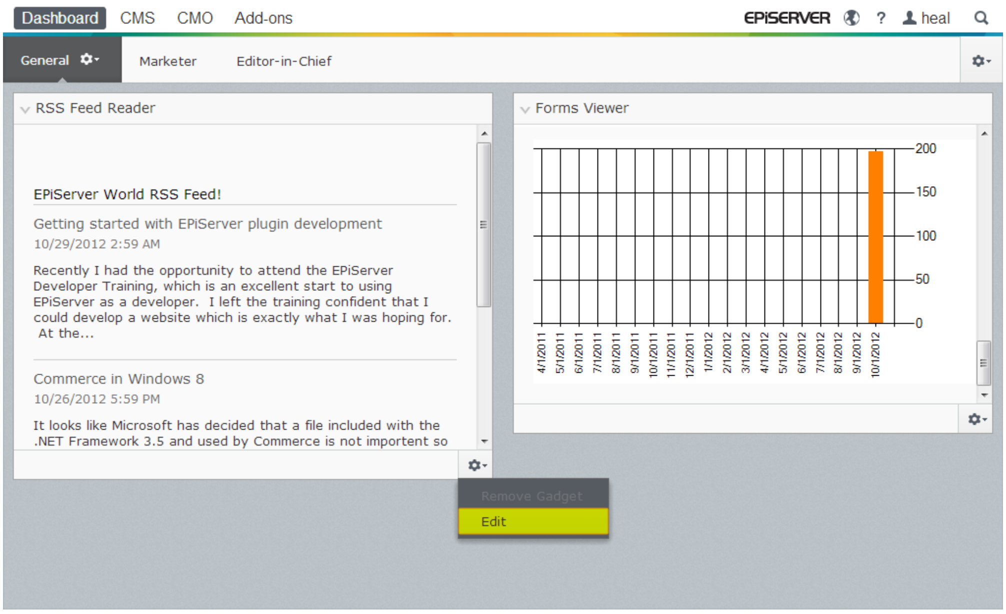
The dashboard is organized into columns, and gadgets can be moved up and down in a column, and between columns.



Move a gadget on the dashboard and panes as follows:

1. Select **Rearrange Gadgets** to unlock the settings.
2. Move a gadget in the pane by dragging it to the highlighted area where you want it, and then drop it.
3. Select **Rearrange Gadgets** again to lock the settings.

Editing a gadget

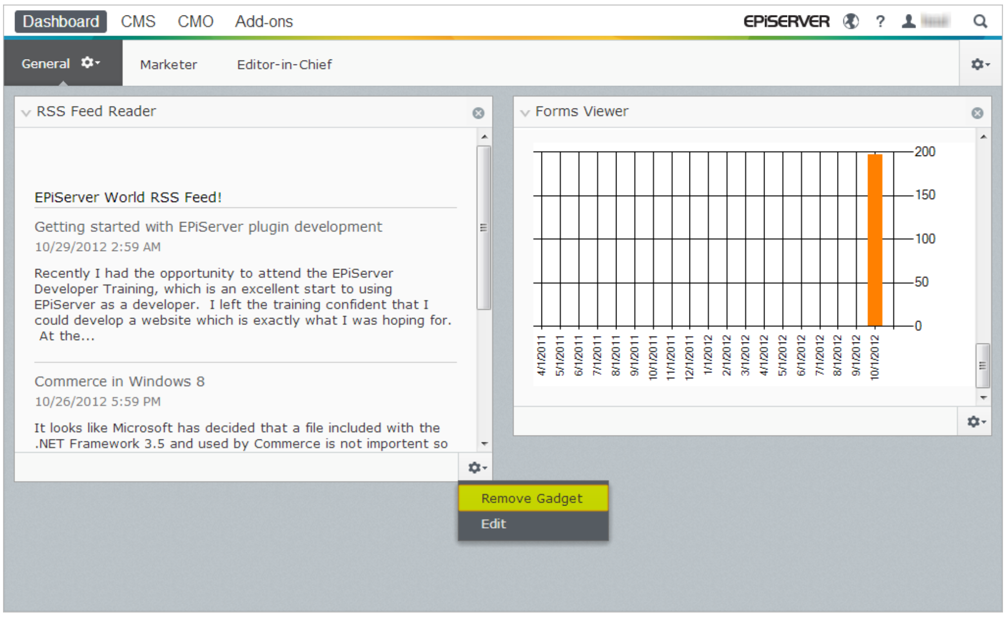


Edit a gadget as follows:

1. Click **Select Options** and select **Edit** . Depending on the type of gadget, editing can be done in different ways.

2. Change the options for gadget. For example, for the **Forms Viewer** gadget you can change the number of items displayed in the regular and maximized view.
3. Select **OK** to save your changes.

Removing a gadget



Remove a gadget from the dashboard and panes in any of the following ways:

- Unlock the pane and click ⊗ for the gadget, and lock the pane again.
- Select the gadget settings and select **Remove Gadget**.

Out-of-the-box gadgets

A **gadget** is a small application that can be made available for easy access from the **Dashboard** in EPiServer OnlineCenter and the **assets pane** and **navigation pane** in EPiServer CMS and EPiServer Commerce. There are gadgets available both for the EPiServer platform as well as product-specific ones, for example gadgets for forms viewing, visitor groups statistics, version management and the product catalog in Commerce. Developers can create customized gadgets for specific purposes, see *EPiServer Framework SDK*.

Gadgets on the dashboard

The following gadgets are available on the dashboard on the EPiServer CMS sample site:

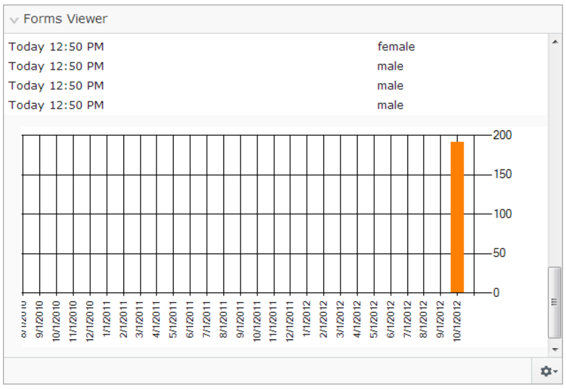
Forms Viewer

The **Forms Viewer** gadget provides a possibility to monitor the activity for a specific web form, for instance a poll, a registration or contact form. This is intended not only for editors, but anyone who has an interest in the activities of your website, for instance a marketing or business area manager.

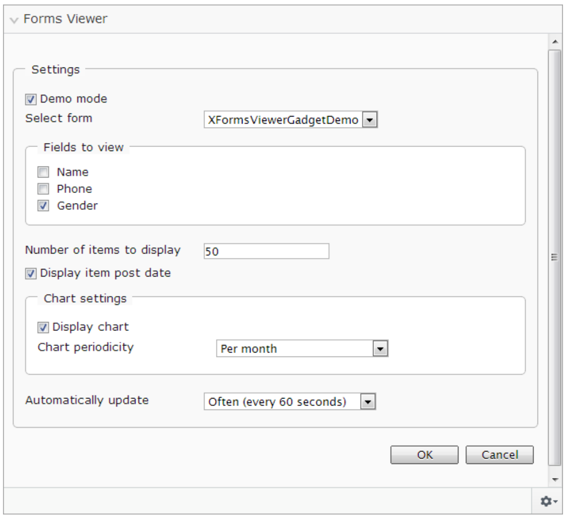
The **Form Viewer** will display a selected number of the latest activities for instance the latest votes or registrations to a form. The result of the **Forms Viewer** gadget can also be displayed graphically, providing a quick and easily interpreted overview of the form activities.

Add a form and configure the settings for the**Forms Viewer** gadget as follows:

1. Click **Edit** in the drop-down list in the top right corner of the gadget.



2. Select **Demo mode** to view the form in graphical demo mode. Note that you will need to prepare a demo view file of the form. This will then appear in the **Select Form** drop-down list. There is an example form viewer, “XFormsViewerGadgetDemo”.



3. Select a form in the **Select form** drop-down list. Depending on the form you select, you will get different options of fields to include in the viewer. In this example, a contact form with a name, e-mail and a message, has been selected.
4. In the **Display item post date**, you can choose to display the date of the form posting.
5. Select the number of form post to display in the **Number of items to display** field.
6. Select **Display chart** to display a chart for the form.
7. Select the periodicity for the chart in the **Chart periodicity** drop-down list.
8. Select the frequency for information update in the **Automatically update** drop-down list. This setting determines how often the information in the forms viewer will be updated.
9. Select **OK** to save the settings.

External Links

The **External Links** gadget provides an overview of the external links of your website. This is useful if you want to find out to which external websites you are referring to from your own site.

Add external links as follows:

When adding external links, you can select the number of items to display in the list. The list will display the number of pages that contains one or several links to each external web address. You can also choose to see a more detailed item list by selecting **Show details**. This option will display the full URL for each link.

Notes

With the **Notes** gadget you can add “post it” notes on the dashboard. When you have inserted the **Notes** gadget on the Dashboard, you can enter the text directly in the notes area. You can also customize the appearance of the **Notes** gadget.

Set up the **Notes** gadget as follows:

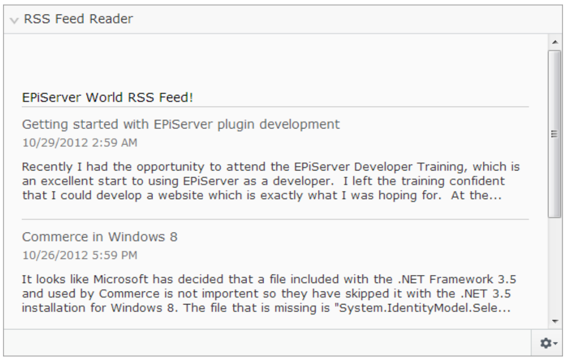
You have the following customizing possibilities for the **Notes** gadget:

- Change the text size by selecting a size in the **Text Size** field.
- Select a background color in the **Background Color** field.

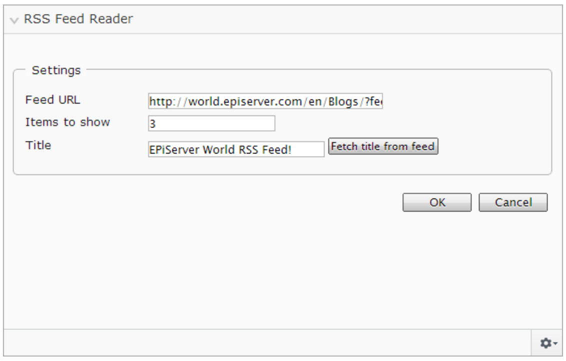
RSS Feed Reader

The **RSS Feed Reader** gadget is a example of how you can use gadgets to display RSS feeds on the dashboard. The gadget shows the latest feeds from an RSS source of your choice. You can define the number of feeds to be displayed in the gadget.

Set up the **RSS Feed Reader** gadget as follows:



Enter the URL for the RSS feed of your choice. Define the number of feed items to be displayed and enter a title for the RSS feed. Click **Fetch title from the feed** to use the default title from the source. Click **OK** to save the RSS Feed Reader gadget. You can create multiple RSS Feed Reader gadgets if you want.



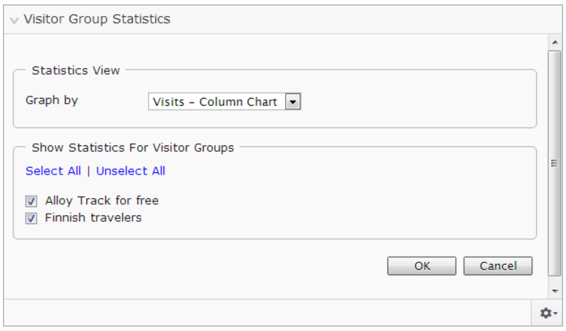
Visitor Groups Statistics

The **Visitor Group Statistics** gadget displays an overview of selected visitor groups in different time periods. You can set up the **Visitor Group Statistics** gadget to follow statistics for the visitor groups viewing the personalized content. By default statistics will only be counted once per session for each visitor group.

You can use this gadget on the dashboard, on the panes, as well as in your iPhone or iPad.

Set up **Visitor Group Statistics** as follows:

1. In the **Statistic View** section, select to show the statistics in the following views:
    - **Visits - Column Chart**. Shows statistics for visits as column bars.
    - **Visits - Line Chart**. Shows statistics for visits as a line chart. Use if you want to view the statistics for only one visitor group.
    - **Total visits - Pie chart**. Shows total statistics for visits in a pie chart.

2. In the **Show Statistics For Visitor Groups** section, select the visitor groups you want to include in your statistics. Or, use the jump buttons **Select All** and **Unselect All**.
3. When you are done, click **OK**.
4. You can change the display of the statistic diagrams **Graph by**, use the jump buttons to see the statistics in the following diagrams:
    - **Graph by**, use the jump buttons to see the statistics in the following diagrams
    - **Day**. Shows statistics for visitor group matches the latest day.
    - **Month**. Shows statistics for visitor group matches for the latest month.
    - **Year**. Shows statistics for visitor group matches for the latest year.
    - By clicking the **Select Date Interval** icon, you can select the start and end dates in the statistics interval.

EPiServer CMS-specific gadgets

The following EPiServer CMS-specific gadgets are available in the editorial interface on the sample site:

Pages

The **Pages** gadget provides a list of all pages on the website in a tree structure, see *Structuring the website*.

Sites

The **Sites** gadget gives you access to change language in the tree structure on your site, see *Globalizing content*.

Tasks

The **Tasks** gadget provides a list of tasks in the navigation pane to take action on.

Blocks

The **Blocks** gadget gives you access to drag and drop shared content as blocks on a page and create new blocks, see *Managing blocks*.

Media

The **Media** gadget gives you quick access to upload and manage files and folders, see *Managing media*.

Versions

The **Versions** gadget fives you access to the version list of the page or block you are working on, see *Managing versions*.

Recent

The **Recent** gadget shows the content that you recently have visited.

Recently Changed

The **Recently Changed** gadget lists recently changed content on the website and selected language. You can choose to view either all changes or your own changes only. The list of changed content will be displayed showing name, status, modification date, the user who has done the change.

Search

The EPiServer platform has sophisticated search functionality which allows you to search through different types of content on a website. You can search for content pages and blocks, files, community objects and products. The search results will automatically be filtered based on access rights so that users will only see content they have access to.

The search service in EPiServer is based on the open source search engine Lucene. The service is pluggable which means that Lucene can be replaced by another search provider. The search functionality can be extended using EPiServer Find to build more advanced features such as filtering and faceted navigation.

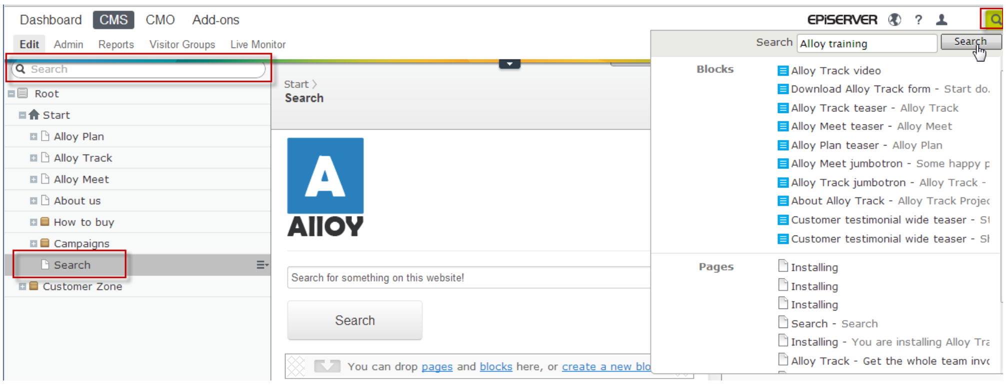
The underlying search functionality is used by the different EPiServer products, and the description here applies to EPiServer products with their respective sample sites with templates.

Search options

Depending on how your installation is set up and from where you are searching, there are different options:

- When editing, the **global search** is available in the upper right part of global menu. Depending on the configured search providers, this option can search all types of content on the website.

- When editing, the search option is available at the top of the left and right hand **panes**. This option will search for content in the components of the panes, for instance **pages** in the page tree, **blocks** or **media** files, or **products** if you are working with EPiServer Commerce content.
- Visitors to the site will usually access search through a **search page** with a search field, like on the EPiServer sample sites. The search field is usually available in the top menu on the front-end of the website.



Search tips

- Enter a sufficient number of search keywords, usually around 6-8 carefully selected words, separated with a space. Start with fewer keywords and if needed narrow your search by extending the number of words. Example: **episerver product project**.
- When searching for specific phrases, you can combine keywords using quotation marks. Example: "episerver search tips".
- The search function is case insensitive, meaning that you can use both upper and lowercase letters. Example: **New York** and **new york** will both return the same result.
- You can restrict the search by placing a plus sign (+) in front of the words that **must** be found to consider the page a match. Example: **+episerver +search +tips**.
- Similarly you can restrict the search by placing a minus sign (-) in front of the words that **must not** occur to consider the page a match, for example **-episerver -search -tips**.
- To match part of a word, place an asterisk(*) at the end of the word. Example: **word1* word2** will return content with the words **word123** and **word2**, but not **word123** and **word234**.
- The boolean operators AND and OR can be used. AND means "I only want documents that contain both/all words", OR means "I want documents that contain either word, regardless of which one". Example: **episerver AND search** returns documents with both words, **episerver OR search** returns documents with either **episerver** or **search**.

Displaying search results

The items in the search result listing will appear based on the ranking they received from the search algorithm.The display of the search results depends on how this is set up on your website, since this can be customized in many ways. Often some kind of filtering is applied which can be based for instance on categorization of content.

Configuring search

The search feature has some administration and configuration options which are managed from the **administrative interface** in EPiServer CMS.

Refer to the *EPiServer Framework SDK* for a technical description of the search functionality, configuration possibilities and the integration interface.

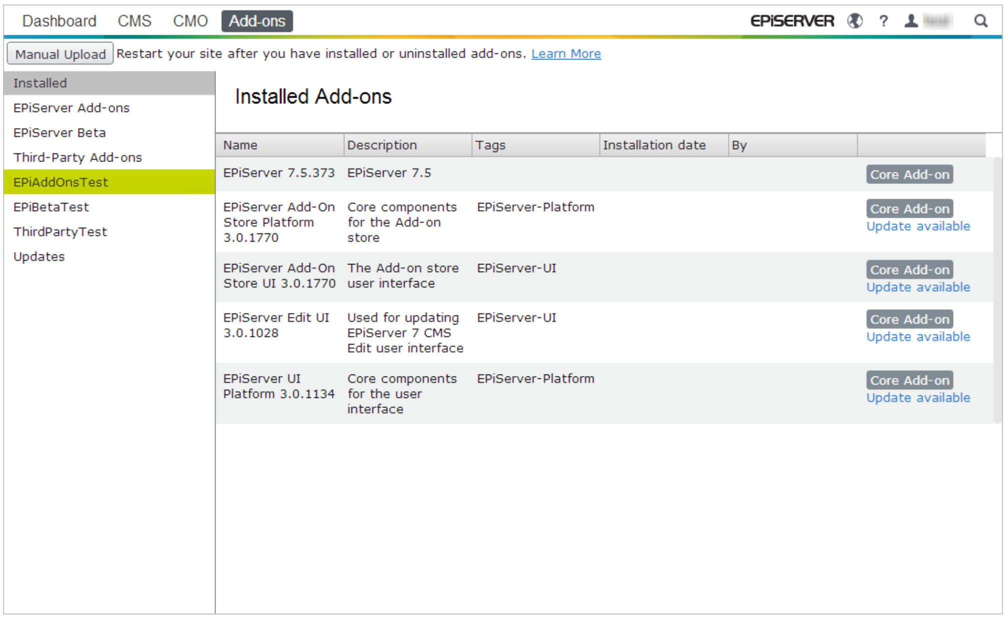
When installing the sample site, Lucene will be the default search provider installed. To find out more about Lucene, refer to the official Lucene website.

Add-on system

The EPiServer Add-on Store feature contains plug-ins and extensions developed by EPiServer and third-party companies, with which site owners and system administrators can extend their website platform. EPiServer Add-on Store makes add-ons easy to find and get started with, and ensures that they will work on the platform. With this feature you can modularize upgrading of the platform by having smaller maintainable pieces, and can also add value to the platform that speeds up time to test and roll out new releases.

The EPiServer Add-on Store supports the following:

- Lists available packages for the environment (products, version) to install and uninstall in a list
- Lists available packages to upgrade, as well as see already installed packages in a list
- Provides possibility to add package files to the list for installation and upgrade through upload



Access the EPiServer Add-on Store by clicking **Add-ons** in the global menu. The EPiServer Add-on Store consists of the following views:

- **EPiServer Add-ons**, **EPiServer Beta** and **Third-Party Add-ons** shows the list of available modules from a feed that you can install, see *Installing a package*. You can browse or search to see available add-ons that can be installed on your website, or which can be updated. EPiServer provides a sample of add-on packages to get started with, and you can test some add-ons in a beta version. Some add-ons can be purchased, and others are free. Here you will also see information about the package and instructions after installation for a quick start.
- **Installed** shows the list of installed modules you can upgrade or uninstall. When an update is available you will also be notified about it here.
- **Updates** shows the list of all available upgrades, see *Upgrading a package*. The EPiServer Add-on Store on the website will be able to determine which add-ons that can be installed based on the particular platform version. In addition, add-on packages can have dependencies on other add-on packages, which will ensure that these can only be installed or uninstalled in such combinations that all dependencies are met.

- **Manual Upload** is where you upload and install module packages as files on your website that has not been listed in EPiServer Add-on Store, see *Uploading a package as a file for installation or upgrade*.

EPiServer Add-on Store has the following buttons:

- The **Install** button will add the module to the site and the **Uninstall** button will remove the module from the site.
- The **Update** button will upgrade the module to the site.

Tip Clicking any of the header columns in the **Installed** view makes it possible for you to sort the installed add-ons in ascending or descending order, by tags, date and more.

Tip Clicking **More information** on an add-on provides detailed information, such as name, description, creator, and dependencies. The add-ons can be tagged for browse filtering.

Note To access the EPiServer Add-on Store interface for installation, upgrading and uploading, you need to be a member of either the **CmsAdmins** or the **PackagingAdmins** role.

The packages for installation and upgrading are in nupkg file format. For detailed technical information about how to develop your own add-ons to upload in the EPiServer Add-on Store, refer to the *EPiServer Framework SDK > Developer Guide.*

Installing a package

Install a package as follows:

1. Under **Add-ons** > select **EPiServer Add-ons**. You can also install beta versions and third-party add-ons.
2. Select the package you want to install and click **Install**. Confirm the installation.
3. You will receive an action feedback message. After the uninstallation has finished, click **Restart site now** if that button appears to restart the website.

Uninstalling a package

Uninstall a package as follows:

1. Under **Add-ons** > select **Installed**.
2. Select the package you want to uninstall and click **Uninstall**. Confirm the uninstallation.
3. After the uninstallation has finished, click **Restart site now** if that button appears to restart the website.

Updating a package

When an update is available for the installed add-ons on your website, you will be notified by the **Update** option.

Upgrade a package as follows:

1. Under **Add-ons** > select **Installed** or **Updates**.
2. Select the package you want to upgrade and click **Update**.
3. After the uninstallation has finished, click **Restart site now** if that button appears to restart the website.

> ***Note*** Also the EPiServer Add-on Store itself on your website sometimes needs to be upgraded. It works like installing any add-on except for that it cannot be uninstalled (the **Uninstall** button is unavailable).

Uploading a package as a file for installation or update

You can also manually install or update add-ons through multiple files upload.

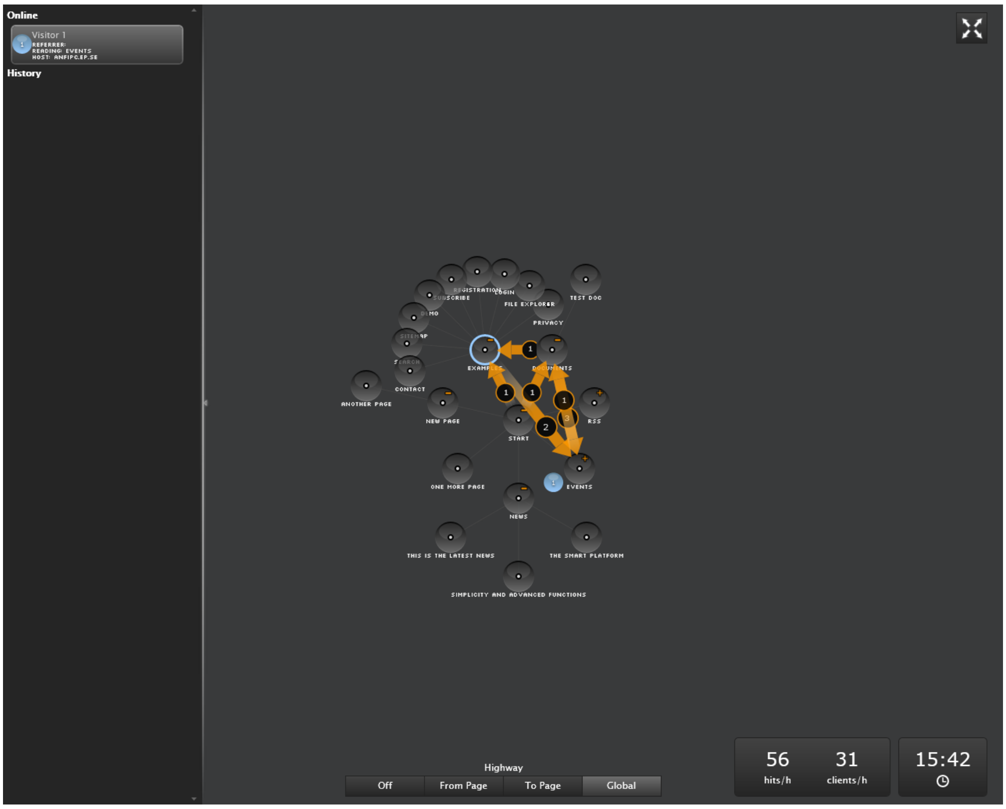
Upload a package as follows:

1. Under **Add-ons**, select the **Manual Upload** button.
2. Click the **Select Packages** button and browse to one or several packages you want to install and click **Install**. The package will be installed to the local repository as well as deployed on the site.
3. After the uninstallation has finished, click **Restart site now** if that button appears to restart the website.

Live Monitor

Live Monitor is used by EPiServer CMS to visualize the current traffic on the website. Live Monitor monitors the traffic to your website and follows the behavior of visitors, making your website activity easily available to the organization.

With Live Monitor you can see potential customers and partners that are visiting your website. Using ”highways” you can analyze the traffic on your website and adapt the communication accordingly.



The Live Monitor user interface is designed to make it easy to see who is visiting your website right now. Clear real-time animations show you how each visitor navigates your website, where they came from and what pages they are visiting. Live Monitor can be viewed in full screen mode.

- **Website structure**. The main part of the Live Monitor user interface shows the structure of the EPiServer CMS website. Click on the circles to expand the structure and see how many visitors are currently viewing a certain page that is stored deep in the structure of the website. Activity on the subpages in the website can be viewed by double-clicking the node (page) in question to expand (or collapse) the structure.
- **Highways**. A "highway" is a common navigation track used on the website and is indicated in the user interface by an orange arrow. Highways make it easy to see how visitors choose to navigate your website and indicate how many visitors have chosen a particular route on the site. It is possible to either view the highways for the entire site, so-called global highways, or to or from a certain part of the website. Global highways cover all the tracks navigated by visitors over a certain amount of time.
- **Real-time visitor information**. When someone visits your website, information about the visitor will be collected based on the IP address. Each IP address (visitor) is assigned a unique number and is displayed graphically by a rotating ball. Visitors to the website are indicated by the same number until they have been inactive on the website for 60 seconds. Click the left frame to expand the visitors information pane.

- **Online and history**. For each visitor you can see the referral URL together with the pages visited and host information under the **Online** section. For each active visitor the current page that is visited is displayed. When a visitor has been static on the website for 60 seconds, the visitor is removed from the list of active visitors to the **History** section. The historical data shows when the visitor's most recent activity on the website was concluded. The time stated is taken from the computer's built-in time and date which is displayed in the lower right corner of the screen.

Accessing Live Monitor on your website

When **Live Monitor** is installed on your website, you will find it in the EPiServer CMS top menu next to the **Report Center**. Live Monitor can be set up to use any page on the website as the root. This does not necessarily have to be the site's start page, although this is most common. The configuration of Live Monitor can be customized. Check with your system administrator what applies on your website, and refer to the technical documentation for Live Monitor on world.episerver.com.

Viewing highways

It is possible to either view the highways for the entire site, so-called **global highways**, or **to or from** a certain part of the website. Global highways cover all the tracks navigated by visitors over a certain amount of time, and will display the most frequently visited pages on the website. The to/from highways displays from which page a visitor came, and to which page a visitor went.

Viewing and hiding global highways

Global highways are common navigation tracks that exist for the entire website. They are indicated by an orange arrow with a number representing how many visitors have navigated the site as indicated by the arrow.

- Click **Global** in the lower part of the Live Monitor screen to display global highways.
- Click **Off** in the lower part of the Live Monitor screen to hide global highways.

Viewing highways to or from a certain part of the website

1. Click the page for which you want to view the highways to or from.
2. Click **From Page** or **To Page**, to display the highways showing from which page most visitors came, or to which page most visitors went.
3. Click **Off** in the lower part of the Live Monitor screen to hide the highways again.

Viewing traffic statistics

The following information is calculated and displayed in the lower right corner of the overview:

- **Hits/hour**. The number of clicks per hour to pages on the website.
- **Clients/hour**. The number of individual visitors per hour to the website.

Displaying Live Monitor in full screen

Click the **Full screen** button in the upper right part of the screen to display Live Monitor in full screen mode. Click the **Full screen** button again to exit full screen mode. You can also click **Esc** on your keyboard to exit full screen mode.