EPiSERVER SEO

Settings and configuration tool

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Description:

This application is the entry point to EPiServer SEO for you and your customers. It will allow you to manage your customers, users and domains profiles. It will also allow your Customer's users to manage profile elements described in this document. This User Guide is aimed at EPiServer Partners.
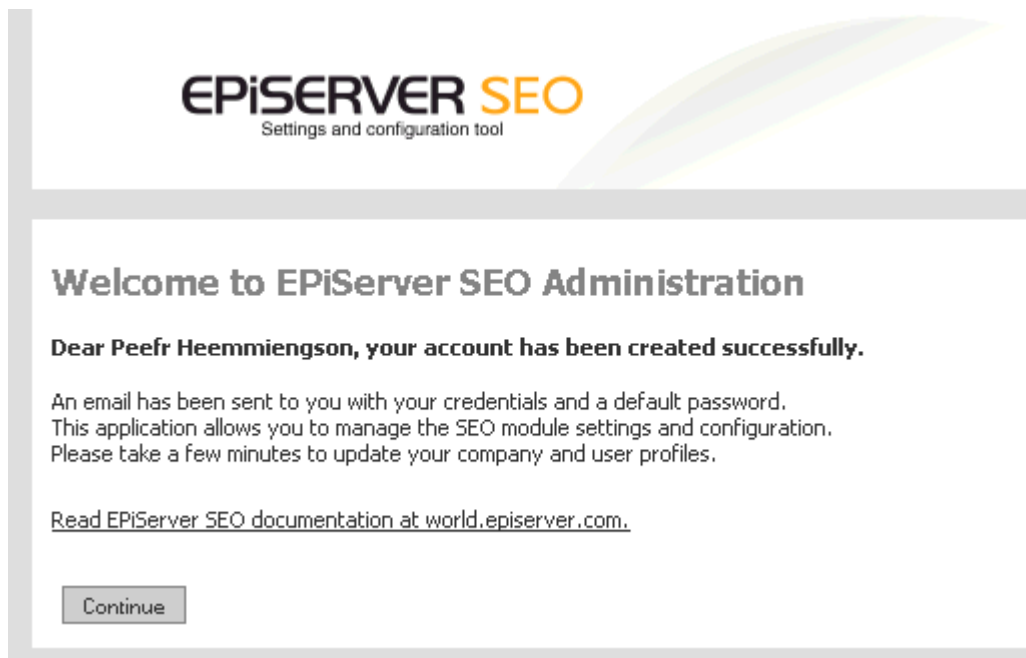
Login

1. Automatic registration

When you are logged into "world.episerver.com" and click on the link to download the EPiServer SEO module, an automated pre-registration is performed using data already available in your EPiServer Partner Profile.
During this process, your account is automatically created and you are redirected to the "Welcome page" of the SEO Administration, where the "User guide" can be downloaded
An e-mail is automatically sent to you with your default credentials. Please take a few minutes to review and make necessary updates of your company and user profiles.

2. Log in page

Each times you or one of your customers need to edit or update profile information or domain settings, log into this page first. Note that if users have forgotten their passwords, it can be retrieved by e-mail by clicking on the link displayed under the log in button.

EPiServer SEO - Administration

Name:

Password:

Login

Note: your credentials have been sent automatically by email during the registration process, if not please contact your partner.

Forgotten your password? Click here

I. Profile administration:

In the Profile Administration you fill in company, user(s) and domain(s) info. The Customer administration is one of the two main sections where you can update and set up the required information: profile, users and domains.

1. Company profile

a. Partner info

Some of the info is automatically filled in during the automated pre-registration (see Log in section on previous page). However, you may need to update/edit some information; in particular the required fields marked in red (see form below).

By default, your Partner profile is displayed when you log in. To display your Customer's profile, select the button "Show my customer's info" located at the top of the form.

b.   Customer info

This screen is used to select the customer in question and to enter and edit customer information.
There are two sections on this screen:
-    The "Customers list" section, which on the top of the form includes an option to filter the customer list based on "customer status".
-    The "Customer profile" section; where you edit customer profile info.

The customer list includes one line with three columns per customer:
-    Customer name.
-    Active domains: current count of total active domains
-    Inactive domains: current count of total inactive domains

Select an <u>existing customer</u> from the list – then update his profile in the right section of the screen. Filter among existing customers to show "All", "Active" or "Inactive" customers based on their status.
Click on the "Update" button to save the profile changes.

Click on the "<u>New customer</u>" button to create a new customer. Then fill in the customer information and click on the "Add" button to save the new profile. Note that required fields are:
-    Name
-    Address
-    Zip/postal code
-    City
-    Country
-    Phone

Note that the "Created" and "Last updated" fields are automatically updated.

2. User registration

You can register an unlimited number of users in this screen. You can also assign responsibilities/roles

This screen is used to manage Users. There are three sections on the screen:
- The "Partner users" list section.
- The "Customer users" list, by default your first customer is selected first.
- The "User profile" section, displays a form for editing user profiles.

a.   Status info

Both lists show three columns:
- User name
- Status: alternatives are "active" (green icon) or "inactive" (red icon)
- Manager: A user who has "Manager" rights (green icon) can edit profiles and settings. All Partner Users can edit Profiles – they have "Manager" rights

Note that Web Managers and Partner Users can change User status to "Inactive". If Customer status is set to "Inactive", Customer Users will not be able to log in.

Select any existing User in one of the two lists to update his profile in the form on the right hand side. Then click on the "Update" button to save the profile changes.

To update user profiles, first select the customer. Then use the drop down list to display the list of users.

b.   Add a new user

To create a new user, just click on the "Add new" button to create a new Partner User or a new Customer User. Then fill in the user information in the form located to the right and click on the "Add" button to save the profile. Note that required fields are:
- Name
- Login name
- Password
- E-mail

An e-mail will be sent automatically to the user notifying him/her about the account creation as well as his/her credentials information for logging onto the system.

3. Domain registration

This screen is used to manage Domains information. There are three sections on the screen:
- "Customers selection"- the list of your customers.
- "Domains" section - the list of domains for the selected customer.
- "Domain profile" section - the form for editing the domain profile.

a. Status info

First, select the customer using the drop-down list. When selecting a customer, the customer's EPiServer SEO registered domains are displayed. For each domain the following information is displayed:
- The domain URL
- The date of renewal: an automatic renewal of the license takes place one month before the expiration of the license period (normally one year). An "alert" icon will be displayed one month before the renewal deadline, to remind you that the license is getting close to the renewal point.
- The status alternatives for domains are: "Active", "Inactive" or "Cancelled". Status "Cancelled" means that the domain will automatically become "Inactive" at the end of the license period. When status change to "Inactive", all tracking is automatically stopped. To reactivate an "Inactive" domain, change the status to "Active" and accept the terms.

Select any existing Domain in the list to update its profile using the form on the right hand side of the screen. Then click on the "Update" button to save the profile changes.
To update domain profiles, select the customer using the drop down list and then select a domain from the list displaying the customer's domains.

b. Add a new domain

To create a new Domain, click on the "Add domain" button beneath the domain list. It will display the additional fields that need to be completed in the domain profile form. Note that the required fields are marked with a red star*

- Domain URL
- Domain alias: Up to 3 domains alias' can be entered. Alias is used to track the traffic of sub-sections of the domain. The sub-section could be under a different domain. For example: an alias for www.example.com could be example.myads.com. Alias is used to include visits/visitors data from this external domain.
- Time zone: Set the time zone of the website.
- Display order: Order in which the domains are listed.
- Session timeout. A "session" is a record of one visitor browsing through a web site, ending when the browser is closed or shut down, or when the user has been inactive on that site for a specified period of time. Default session time may vary between web analytics tools and thus explain differences in visits count. Default session time in EPiServer SEO is 20 min but the "Session timeout" pull down let you change the default setting
- Track sub domain: Select "Yes" if you want to track sub-domains. If you do want to track sub domains, it means that you will track the traffic coming from all sub-domains (where the tracking script is implemented) forthe specific domain. For example, if your domain is www.example.com, you may also track the sub domains: myproduct.example.com or france.example.com. By default, sub-domains are tracked.
- Country: Country of the domain – normally the top level domain used for the specific website. The "Country" setting is used for monitoring the rankings in Google and other important search engines for the prioritized keywords defined for the specific domain. For example; if "Country" is France, the rankings on prioritized keywords would include Google.fr, Yahoo.fr, Bing.fr, etc.
- Renewal date (Read only): Date of automatic renewal.
- Status: (Read.only for customer users) Default is Active. You can stoptracking of the website, robot simulator scans as well asaccess to the SEO module by setting the status to "Inactive". You can also change the Status to 'Cancelled', in which case the domain Status becomes Inactive at the end of the contract period.
- .Net Version (Required)
- EPiServer Version: (Required). Select the current version of EPiServer CMS applied for this domain. Correct version is important because the EPiServer SEO installation package that will be forwarded to you will be based on this information.
- Estimated traffic (Required). Select estimated page views level per month for the specific domain. If the domain is expected to exceed 5 mill page views per month (calculated as average over a 6 month

period), there will be an extra charge for 5-10 mil/10 – 15 mil/15 – 20 mil page views per month. Check current price list for exact charges in your country.
- Protocol: Default is http
- Port: Default is 80.
- EpiServer alias:This is important and used for the SEO module identification. If you access the edit mode with a different url host name   than the public domain used by visitors, you might need to set up an alias.   For example if your editors access the edit mode from inside the local network with an URL like this: http://myserver/cms/edit to access the edit mode for the website "www.example.com", then you need to set up "myserver" as an alias.
- Proxy settings: port + IP address in case the EPISever CMS users are in a network using a proxy
- Website type: Used for benchmarking reports. (Required)
- Industry type. To be used for Benchmarking reports in later versions of EPiServer SEO.

Last but not least: Accept the terms.

New domain agreement

If you add a new domain, you will be billed automatically according to the estimated traffic you entered above. For more details click the link below. You shall receive a confirmation email shortly after.

Read the terms of service

☐ I accept the terms

Add

Before completing a Domain Profile, a "New domain agreement" section at the bottom of the form has to be completed. You must accept the "End User License Agreement" by clicking on the checkbox in the "New Domain Agreement" section. Click on the link to read the full terms of the document.
An invoice will be sent automatically to you by e-mail account along with the link to download the module package. This invoice is based on the page view level selected in the "Estimated traffic" field in the domain form. Then fill in the domain information in the form on the right hand side and click on the "Add" button to save the profile.

II. Domain configuration

1. Domain settings:

a. Plug in settings

This screen is used to manage the domain information related to EPiServer SEO; in particular information that could change over time.

For example, a typical usage of this form is to keep track over time of software upgrades or configuration updates. Typical situations where updates are required are when a customer upgrades his EPiServer version, upgrades his EPiServer SEO package or when the customer's network starts using a proxy.

b. Script

This screen includes the "tracking script". The tracking script shall be implemented into the source of each page you want to track on the domain you registered. The position of the script matters, therefore we recommend that you place the script just before the end of the </body> tag in your html code.

If you do not use a master page to implement this script automatically in each published page, you can download the "*PageScript" module from labs.episerver.com. This is a free module, and enables you to implement the script within a few minutes.

c.   Setting Goals

This page is used to set up your goals for each KPI (Key Performance Indicator) used in the SEO KPI report. This goal definition screen is typically used by Web Managers. . Goals are moving targets and should be periodically reviewed..You'll find definitions and more information about the KPIs in the KPI status report in the EPiServer SEO User Guide.

To set up a goal, select a predefined KPIin in the drop down list and enter its goal value. The following information is displayed for each KPI/goal:

- KPI
- Actualresult, if available, for the last 30 days. Note that some or all of these results will not be available when you set up a new domain.
- Current goal for this KPI
- A "Delete" button to remove the goal from the list.
- An "Edit" button to edit the value of the KPI.

d.   IP Exclusions

This screen is used to exclude an IP address or an IP range from monitoring and/or from reporting.
- IP Exclusions from monitoring: Used to avoid tracking unwanted traffic. The page views coming from these IP addresses will be discarded completely.
- IP exclusions from reporting: Used to avoid displaying non-relevant traffic that you nevertheless want to keep track of. Typical exclusion areas would be visits from you own employees/offices. The visits tracking – including/excluding excluded IPs - is used in the "Page Stats" tab of EPiServer SEO.
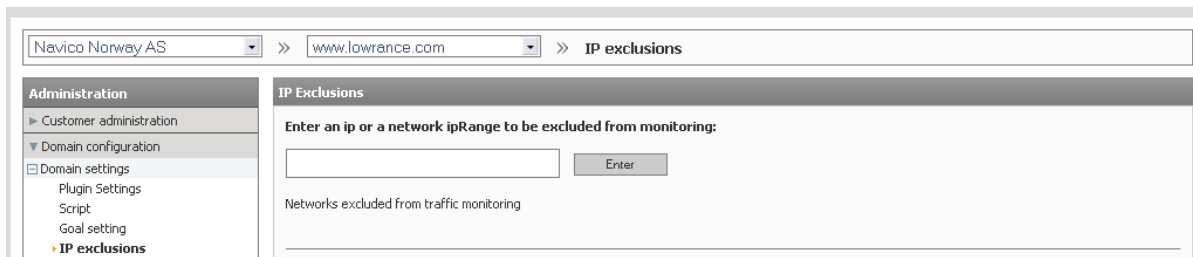
2. Scans

Two types of scans are performed by our robots to collect and prepare the data for the SEO module:
- Rankings in major search engines for for your prioritized keywords
- Robot simulator scans for evaluating the technical quality of the website up against the technical requirements of major search engines. Primarily used in the "Technical advice" tab/section of EPiServer SEO

a.   Schedule

This screen is used to schedule the scans of your website.

There are two sections on this screen: 1) the top form to manage the scheduling, 2) a list to review the scanning history.

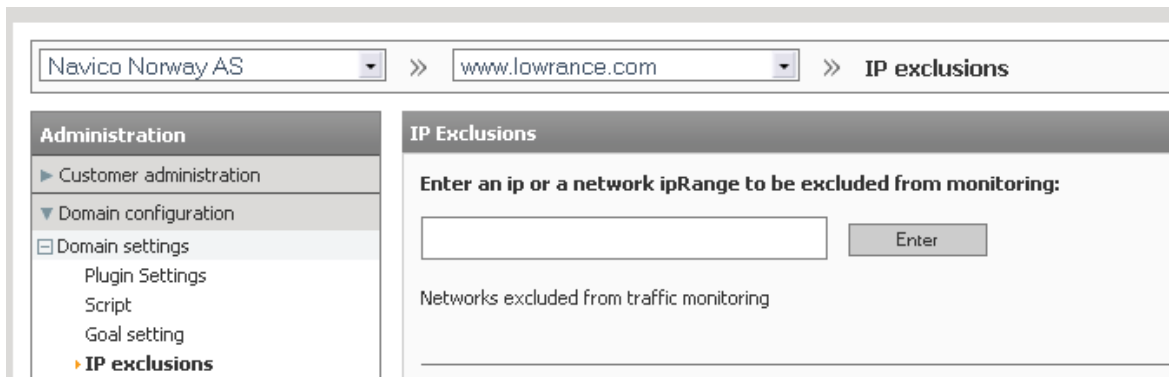The top section includes the following elements:
- Start/Stop button for the weekly scans
- An "ad hoc scan" button to initiate an immediate scan.
- Doctype definition: select the current doctype used for this website
- Scan type: Option to select between a "Technical/Content" scan which generate the technical advice and a "Web position" scan for Prioritized search phrases rankings and analysis.

In the scan history list, you can review the type of scan, the status of the latest scans, the date when the scan was performed, the template used (only for technical scans) and the interval in days between two scans.
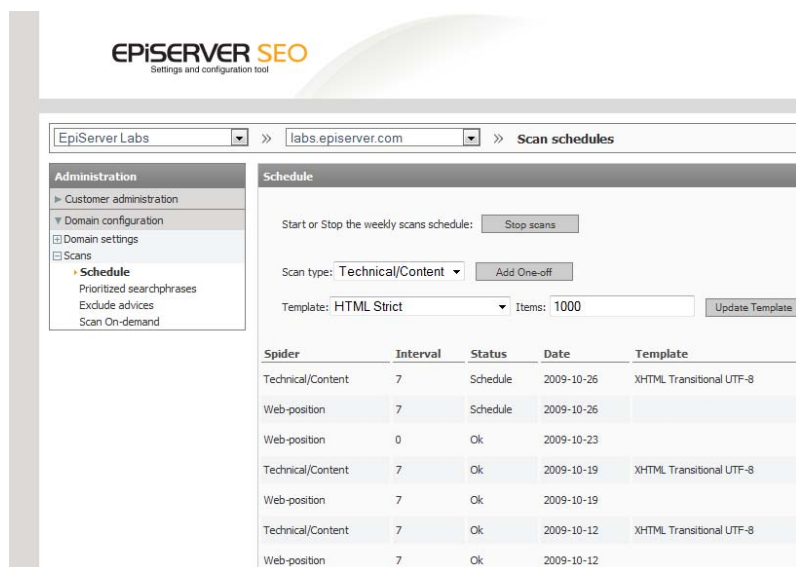
b.   Prioritized search phrases (Keywords)

This page is used by your Customer's Web Managers to set the prioritized keywords for the domain. These prioritized keywords are used in the search engine ranking scans and are displayed in EPiServer SEO in the "Keyword analysis and reporting" section as well as in the Editor Advice and Keyword Analysis tabs. See the EPiServer SEO User Guide for more information.
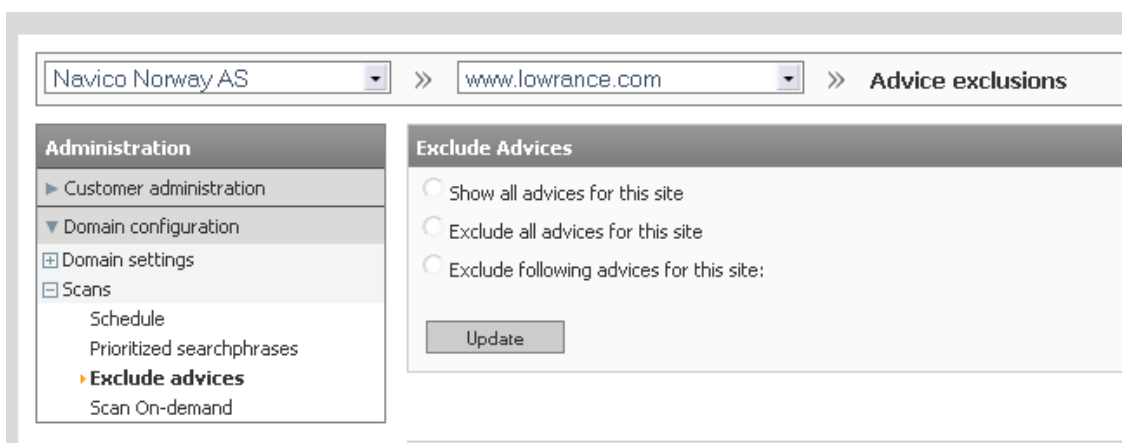

c.   Advice exclusion

This screen is not visible to your customers. This page is used to decide whether all, some or none of the technical advice shall be used when performing the Digital Visibility score rating..

Digital Visibility is the automated score, on a scale from 0 to 100, assigned by the EPiServer SEO robot simulator when last scanning this Web site. Digital visibility is a measure of how well the Web site meets the technical requirements of search engines.

d.   Scan-on-demand

This screen is used for ad hoc scans (to scan one page on demand) in order to get a technical report (pdf) in just a couple of minutes. This screen is divided in two sections:
-    The form to enter the URL to be scanned
-    The history of all scanned pages

The following information is required:

- URL: http address of the page to be scanned
- Template: Select the doc type used for the specific URL.
- E-mail: e-mail address which will receive the scan result pdf document. If multiple recipient e-mails, separate with semi-colons (";)

The "Scans history" list allows you to keep track of the latest scans performed, you can download the list by clicking on the pdf icons.
If a requested scan does not appear in the "Scan history" list within a couple of minutes, click on the "Refresh" button in the header to refresh the list of scanned urls.
This "Scans history" list displays the latest scans performed, other relevant information, plus the 'Status' of the scan that is pending. Final status are either "OK" or "not OK" in the case that the scan was not completed successfully.
The URLs to be scanned must be reachable through internet in order to allow our robot to browse the page.