

# EPiSERVER CMS 6

Version 6 R2



## Editor's Manual

# **EPiSERVER**

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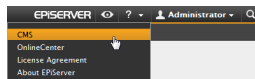
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# About this Documentation

This documentation is intended for users of EPiServer CMS and EPiServer OnlineCenter according to role.

## How to Access EPiServer Help System

EPiServer CMS features a web help system. The entire web help content can be accessed from the main OnlineCenter menu, which is always visible at the top of the EPiServer CMS website. Click the ? icon in the top menu and select the product for which you want to view the Help. Browse or search for the topic where you need guidance.



In addition to this, context-sensitive help is also available inside EPiServer CMS. Click the **Help** button where available in Edit or Admin mode, and the Help window will open.

You can also access the web help by browsing to [webhelp.episerver.com](http://webhelp.episerver.com).

## Expected Knowledge

As a reader of this documentation, you are assumed to have good understanding of the following:

- The standard Windows environment
- Basic word processing skills (no specific web publishing or HTML knowledge is needed)

## References

The following parts are listed as references and will not be described in this documentation:

- How to set up tabs, zones and gadgets, see EPiServer OnlineCenter Guide.

## 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.

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# Introduction

## This Is EPiServer CMS

EPiServer CMS is an information platform that allows you to quickly and easily publish information on a website without any specific web publishing or HTML knowledge. EPiServer CMS allows any staff member to easily create and update a company's website through a web browser. EPiServer CMS offers a number of complete functions that each editor can use to develop the website.

The aim of a platform such as EPiServer CMS is to distribute the work involved in keeping a website up-to-date among as many people as possible. It is easy to learn and use with complete functions. If you already have considerable experience in creating web pages, you can use your knowledge to create web pages using HTML, or other tools you are used to using (which you can integrate into EPiServer CMS). Anything you can do using HTML, you can also do using EPiServer CMS.

EPiServer CMS is a platform for all types of websites. Most commercial websites are aimed at different target groups. Almost all companies have a public website that they use to market themselves and their products to customers and other interested parties. Most companies also have an intranet, which is a website for publishing internal information for employees. Many also have an extranet, which is intended for employees and often for close partners and subcontractors as well. These last two types are usually password protected, so that only those with the necessary authorization can access them. Through working with EPiServer CMS, all kinds of websites can be managed on one single platform. Some organizations have chosen to implement EPiServer CMS on all their websites, while others only on a selection.

Since all editing work is carried out directly via a web browser, you will always be able to log on to EPiServer CMS via the Internet to create and update information, irrespective of time and place.

## How EPiServer CMS Works

EPiServer CMS consists of a basic platform (core), which contains all the basic functionality available to editors and administrators. For each individual website a customized solution is created on top of the platform, which makes the website unique for visitors. The way in which you work as an editor or administrator is largely the same for all websites constructed in EPiServer CMS.

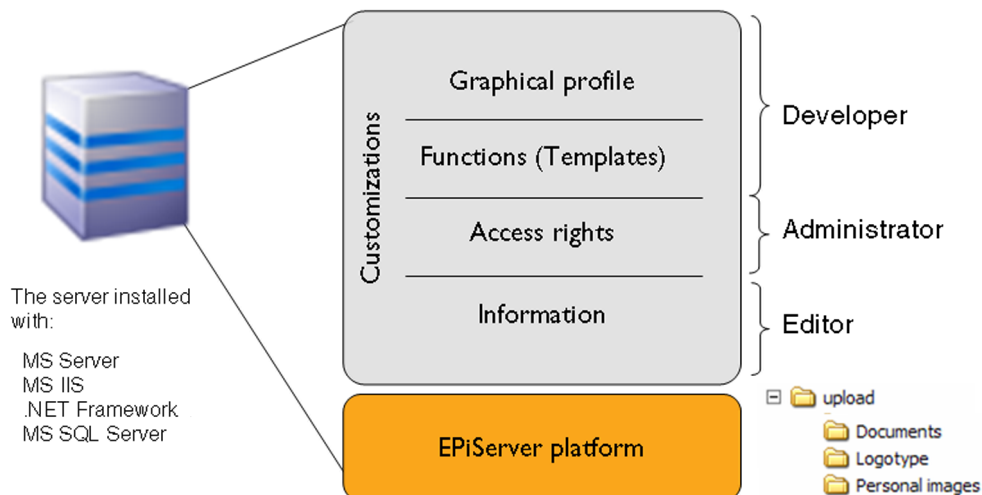
Once a standard installation of EPiServer CMS has been completed, it is ready to use immediately. During the installation process, you can choose to install an example website that has a graphical appearance and a number of functions that are ready to use. When you are creating your own website, you can either use the sample website or you can start from scratch and build a completely new solution.

EPiServer CMS uses Microsoft Internet Information Server as a web server for managing web publication. All the information displayed on these web pages is stored behind the scenes in a database. The web server and the database are run on a Windows server. EPiServer CMS uses the same authorization model as Windows, which means authorization work is extremely simple. Images and documents that editors upload to the web server are stored in one or more separate data sources on the web server.

The core is what supports version management, preview, workflow, access rights, etc. These are functions that enable you to work in Edit mode as an editor. It is the platform that is available in different versions and developed continuously. Upgrading is carried out manually and each organization decides whether or not to upgrade. When you upgrade the platform, you do so for all the editors at once.

On top of the platform is the customized solution, which makes the website different from other websites. Certified partners create the customized solution in cooperation with the customer. In slightly simplified terms, the customized part can be divided into the following parts:

1. The company's graphical profile is saved in a format template (CSS). This contains the predefined fonts, colors, etc. that are to be used on the website.
2. A number of different functions that visitors can use on the website, for example, participating in a discussion forum, sending an e-mail with a link to a page or printing a page. Each function is normally linked to an individual page template.
3. The access rights for editors and visitors to different pages.
4. The information on the website, which is stored in a database. Any images and documents on a page are stored outside the actual EPiServer CMS on a suitable data source.



EPiServer CMS allows for editors to completely focus on creating interesting content and building websites worthwhile visiting. The other parts of the web platform can be handled by developers and administrators. The aim of a platform is to eliminate the need for an editor to deal with technical aspects to manage the website. All this should be ready in the system so that the work of editors is made as simple as possible. Because the various parts are separated, it is possible to work in parallel with the construction of the website. Developers can code functions at the same time as editors create pages with content.

## The Company's Graphical Profile on the Website

One of the first decisions you will need to make when creating your website, is its design. The next stage is to decide on the colors and fonts to be used, what size the text should be, how the navigation will work, etc. This will comprise the graphical profile of the website. In EPiServer

CMS, all this information is stored in a CSS document. CSS stands for Cascading Style Sheet and can, in simple terms, be compared to format templates in MS Word.

One major advantage of using format templates is when changes need to be made to the graphical profile. With format templates, changes are made in a single document and the changes can then be implemented on all pages, whether it be 10 or 10,000 pages. Without format templates, it is therefore necessary to carry out the changes on each page individually.

## Page Templates and Page Types

When planning the structure of a website, you determine which different functions should be available to visitors. This could include news publication, subscription functions or a discussion forum. When you have decided on the functions you want to include, a page template is created for each of these functions. Using these page templates, editors create content and publish pages on the website. As the templates are customized entirely according to the needs of your organization, there might be page templates on your website that look completely different from those described here.

EPiServer CMS features both page templates and page types. Page templates are .aspx pages that are displayed to visitors and contain the functionality required to perform a specific function. Page types, on the other hand, are forms in which the editor can enter information in EPiServer CMS. Each page type is mapped to a page template holding the functionality of the page. Work in the EPiServer CMS Editor and Admin modes is defined as primarily involving page types.

## Support for Accessible Websites

The Internet and web pages form a flexible environment in which each visitor can individually choose how things should appear and function when he or she visits a website. Different visitors work in different computer environments that interpret what we want to present in different ways. For example if your eyesight is poor, you can use a setting on the web browser to increase the font size in order to make it easier to read the text. The production templates included in EPiServer CMS are coded to support accessibility on the website. This means that anyone can view the information on the website, regardless of the tool that he or she is using. This will not entail any great differences for you in your work as an editor. You should remember that the way in which you experience the design and appearance of your site does not always correspond to the way in which other people experience it due to different personal settings or the use of interpretation tools when reading the page.

## Content Stored in a Database

The task of editors is to fill the website with content. The layout of the website and its structure are created by developers, while the content is created by editors via their web browsers. When an editor enters Edit mode and creates pages, all the information is saved in a database. However, files on a page are not stored in a database. Instead they are instead stored in a designated central location. Quite simply, the page contains a link to the place and file that is to be shown.

## Access Rights

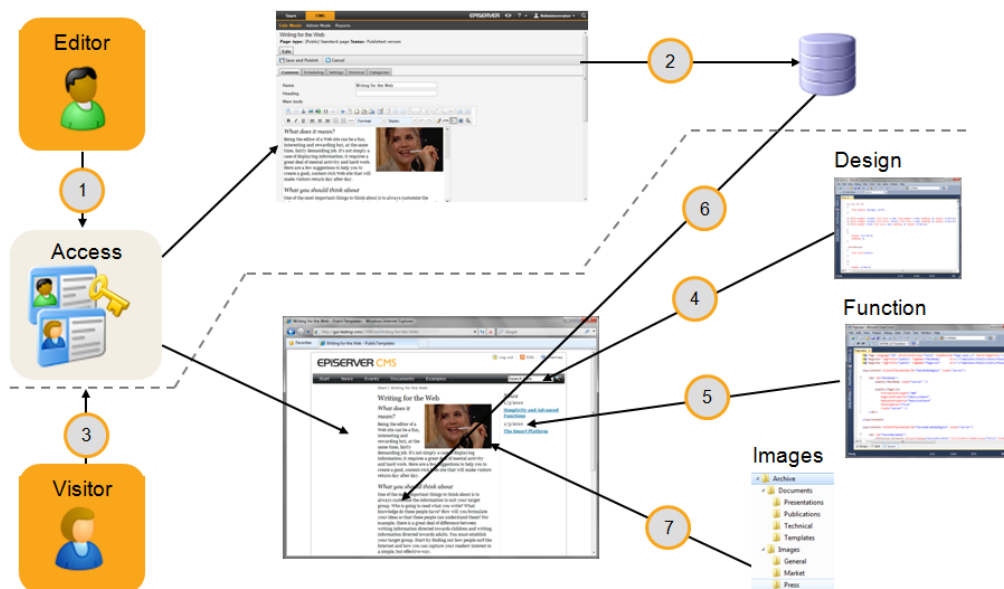
EPiServer CMS uses the same authorization model as Windows. Access rights in EPiServer CMS are usually divided into two parts: Access rights for the website's editors and administrators and access rights for visitors to the website. It is possible to set access rights so that certain

employees can edit the information on specific pages of the website. This way, different departments can work on the same website without accessing each other's information. It is also common practice for editors not to have the same access rights as administrators.

Access rights for visitors can be used in different ways. A common area of application is a public website, where parts of the site also functions as an extranet. In EPiServer CMS, it is possible to assign access rights to individual users and web pages, meaning that different visitors will see different parts of the site.

## Working Procedure in EPiServer CMS

1. The editor logs in to EPiServer CMS via the website to be edited. The system checks the individual's access rights and if they have access rights to create pages, a page can be created in several different ways.
2. Content added by the editor (text, links, etc.) is saved in the database.
3. When visitors access the page using their web browsers, their authorization is checked first. If a visitor has the access rights to read the page, the system starts to load the various components and displays the page.
4. The graphical profile is retrieved.
5. The functionality of the page is loaded.
6. Information is retrieved from the database.
7. Any images and documents are uploaded to the page. The assembled page is displayed so that the visitor can read it on his/her screen.



## Web Browsers

EPiServer CMS will work with a number of different web browsers such as Internet Explorer and Firefox. For precise details on versions, please check the technical documentation for EPiServer CMS on <http://world.episerver.com>.

Although HTML is designed to display information identically irrespective of the hardware and software being used, it can still look slightly different. There are a multitude of different HTML variants that are interpreted slightly differently by different web browsers. This means that you should always check your website on various web browsers in order to see how it will look to your visitors. It is also useful to test different screen sizes and operating systems, simply to test the settings the majority of visitors are likely to have.

## The Working Areas of EPiServer CMS

An EPiServer CMS website consists of several areas where different tasks are carried out. When you are logged in to your website, you will be able to switch between the different areas by using the right-click menu of EPiServer CMS and selecting the desired option. Depending on your access rights, all options may not appear in the right-click menu, see "Getting Started with EPiServer CMS" on page 13.

- **View mode** displays what your website looks like to anyone visiting it. From View mode it is not possible to determine the information platform on which the website is based. Only published pages are visible in View mode.
- **Edit mode** is used by editors to create or update information on the website. It gives access to all editing functionality and is therefore the main editing area for full-time editors and webmasters.
- **On-page Edit** and **Quick-Edit** are areas where editors can quickly and easily change certain areas of content on a web page by right-clicking, editing and publishing.
- **Admin mode** is where administrators create and modify the settings for the website, for example, change page types, manage access rights etc.
- **Visitor Groups** is where administrators create and modify different target groups to personalize the content on the website.
- The **Dashboard** is an area in EPiServer OnlineCenter where users add gadgets for presenting high-level information or providing quick access to common tasks or frequently used features, for example recently changed pages, tasks, notes or other activities on the site.

## Roles

When an organization implements an EPiServer CMS solution, there will always be a number of different roles pertaining to this task. The number and type of these roles depend on the size of the organization. The development of EPiServer CMS has been based on a number of roles. These roles are often used in this documentation to describe specific work procedures.

- **Visitor** refers to an individual using the website, who by using a web browser to visit a website to find information, or to use services available on the site. With regard to an intranet, all employees of the company assume the role of visitor.
- **Occasional editor** refers to an individual entering data on the website by changing content directly on the web page. All material created in this mode is published directly. Some occasional editors have access to Edit mode, however, the majority do not. In many cases, the occasional editors do not have the access rights to publish information; this must instead be carried out by an editor or webmaster.
- **Editor** refers to an individual entering data into more frequently than an occasional editor. The editor has access to Edit mode and can have various access rights. Some editors are



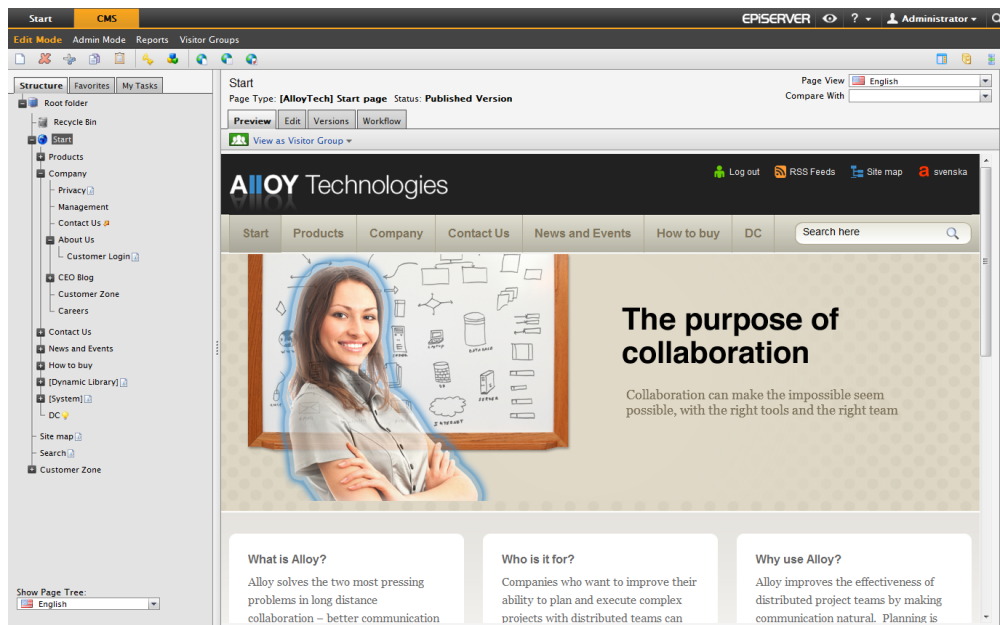
only able to create information in specified areas of the tree structure. Others have the right to create, edit and delete information, but not publish it. A third option may be that an editor has the access rights to all the functions available in Edit mode.

- **Webmaster** refers to an individual who is also an editor, but with slightly more responsibility, and who often publishes content created by others. A lot of organizations have a webmaster, although editors are often assigned the access rights to publish their own information.
- **Administrator** refers to an individual responsible for the entire website. The administrator has access to both Edit and Admin modes in EPiServer CMS. The task of the administrator is often to help make life easier for editors, by adapting the platform to meet their needs.
- **Developer** refers to an individual with a good knowledge of programming, whose job is to develop functionality and page templates for the website.

# Getting Started with EPiServer CMS

Access Edit mode as follows:

1. Open your web browser and enter the address of the website you want to edit. There are different ways of logging on to a site. Often you add a path such as "epi/ui/edit" or "epi/ui/admin" to the URL of your website, or there might be a login button. A login box will appear for you to enter your username and password. Check with your system administrator what applies for the login procedure of your specific site.
2. Right-click and select to **Edit Mode**, and the following content will be shown in your browser.



The left side has the following tabs:

- The **Structure** tab shows the contents of the website in the form of a tree structure of pages. Above the pages is the toolbar, which contains the tools for working on the structure.
- The **Favorites** tab shows the pages you have set as your personal favorites. A quick way of accessing pages that you use frequently.
- The **My Tasks** will display your tasks and activities on the site.

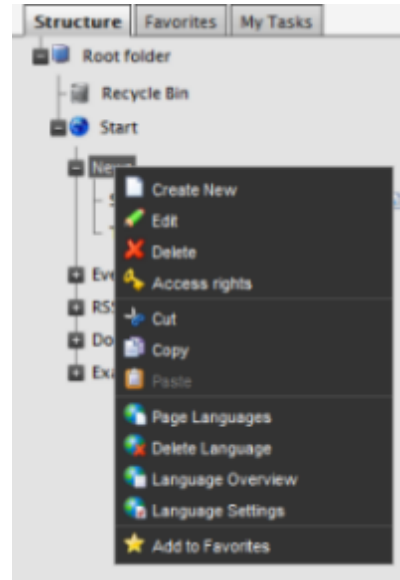
When the **Root folder** of the site is selected in the tree structure, the right side will display:

- A link to **My Settings**, where you can personalize EPiServer CMS. This includes setting the display options for the editor interface, and the installation of EPiServer CMS components, as well as the plug-in for publishing from Microsoft Office, on your computer.
- A link to the **License Agreement** section.

## The Tool Menu on Right-Click

Using the right mouse button in the tree structure gives you easy access to some of the toolbar functions. From here, you can also directly edit a page without selecting the **Edit** tab after you have displayed the page.

You can add the page to **Favorites** for quick access. This means you do not have to search for the page in the structure.



## The Toolbar

The toolbar contains a number of built-in tools that are used when working with the pages and their structure. Some buttons can be unavailable in your installation, which means either that you are not authorized to use this tool or that it has not yet been activated. The globalization tools are only visible if globalization is enabled on your website.



Many of the tools found on the toolbar can also be accessed from the right-click menu, which appears when you right-click a page in the tree structure.

### New Page



All menus and structures in EPiServer CMS are built up by creating new pages. To create a new option in a menu you simply create a new page. The menus are then dynamically built up of the pages on the website. See "Create, Save and Publish Information" on page 17.

### Delete Page



You can delete pages from your website using the **Delete** button in the toolbar. Select the page you want to delete and select **Delete** from the toolbar. Remember that all underlying pages will also be deleted. Once you have deleted a page, it is sent to the **Recycle Bin**.

### Cut Page



Using the Cut tool, you can move a page in your structure to a different location. Select the page you want to move and select the **Cut** tool. Select the page to which you want to move your page select **Paste** from the toolbar. If you interrupt the operation before you have chosen to paste, nothing will change on the website. Remember that all underlying pages will also be moved.

### Copy Page



You can copy pages using the **Copy** button in the toolbar. Select the page you want to copy and select the **Copy** tool. Select the page to which you want to copy your page and select **Paste** from the toolbar. A new, identical copy of the copied page will now be placed at the chosen location, after which the page can be edited. Underlying pages and associated files in the page folder will also be copied and the links will point to the new copy of the page.

### Paste Selected Page



You can copy pages using the **Copy** button in the toolbar. Select the page you want to copy and select the **Copy** tool. Select the page to which you want to copy your page and select the **Paste** tool. A new, identical copy of the copied page will now be placed at the chosen location, after which the page can be edited. Underlying pages and associated files in the page folder will also be copied and the links will point to the new copy of the page.

### Access Rights



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

To set access rights for a page, begin by selecting the page and then select the **Access rights** button in the toolbar. This will open a page from which you can opt to set access rights for either a group or for particular individuals.

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

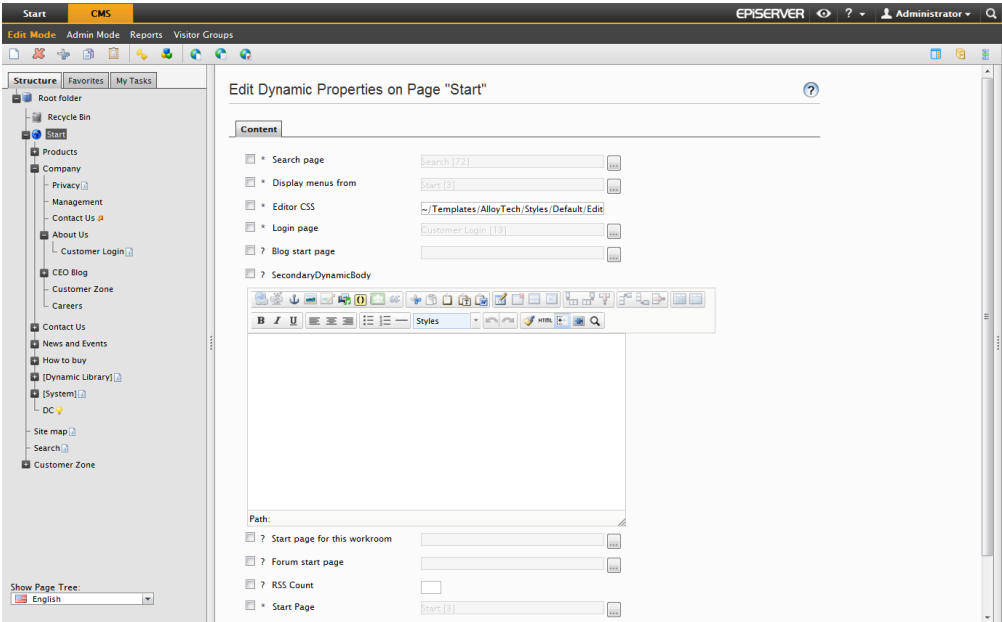
By selecting the check boxes, you can delete or set access rights for various groups and individuals. If the check box is selected, it means that the group or individual is entitled to do what is displayed. If the box is empty, these access rights have been denied. For example, if you do not want the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

### Dynamic Properties



Using the **Edit dynamic properties** tool, it is possible to customize functions in the website so that they apply to a particular page and its sub-pages. Certain properties are the same on many pages, so it becomes troublesome to have to fill them in on every page. Using dynamic properties, you can store a property on one or more pages simultaneously. The different dynamic properties that are available vary, depending on the type of website you have built up and the functions you want.

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



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


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

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

Buttons with Globalization Support

If you have chosen to activate the globalization support in EPiServer CMS, you will see an additional three buttons in the toolbar. Page Language, Page Overview and Page Settings.

Action Window

 The Action Window in EPiServer CMS can contain different functions depending on how your website is constructed. The aim of the Action Window is to allow you, as editor, access to other parts to work with at the same time as you work with content in EPiServer CMS. Which parts those are, depends on how your website is constructed and which functions and modules you have implemented. When you select the Action Window in the toolbar, the window appears on the right in the web browser. You can hide the Action Window by clicking Hide in the right corner or the button **Open Action Window** in the toolbar.

You start a function by selecting the grey link containing the name of the function. To return to the Action Window, select the **Action Window** text at the top of the tab. In a standard installation of EPiServer CMS there are seven functions in the Action Window. The following functions are available:

- **Page Languages** . View the status of and access the different languages for the current page.
- **Create New Task** . Create a task and assign it to a user in the system.
- **File Management** . Upload and manage files and folders.
- **View Autosaved Page Drafts** . View the list of autosaved page drafts, see "Options for Saving" on next page.
- **Create Workflow** . Connect a workflow to a current page.
- **Approve Mirroring Updates** . A list of defined channels that are available in this system. Only displayed if mirroring has been configured on the website.

### File Management



Selecting the **File management** tool will open the EPiServer CMS File Manager in the Action Window to the right in the window. You can work with files here in EPiServer CMS in the same way as you would work with a normal File Manager on your computer.

### Workflows



By selecting **Start workflow instance** you can create a workflow by manual means, for example to ask someone to check changes you have made to a page.

## Create, Save and Publish Information

The procedure for creating pages in EPiServer CMS can be described in the following steps:

1. Decide where you want the page to be located, and create the page.
2. Add the content, such as text and images.
3. Save the page. You may want to continue work with the page.
4. Publish the page.


In EPiServer CMS you can create a new page in the following ways:

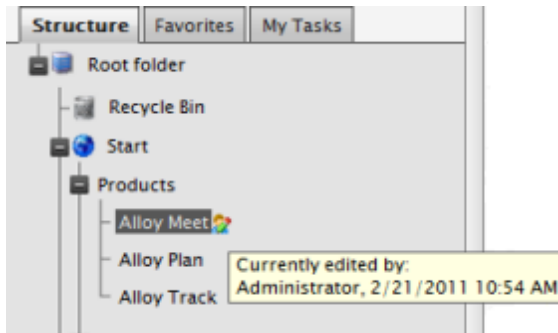
- Right-click and select **New Page** in View mode, see "Edit Using the Right Mouse Button" on page 21.
- Right-click and select **New Page** in Edit mode, see "Creating a Standard Information Page in Edit Mode" on page 20.
- Select **New Page** in the toolbar in Edit mode.

### Options for Editing

In Edit mode you can see if there is someone else working on a page to avoid the risk of conflicts. You have the following options:



### Using the Editing Symbol in the Tree Structure

All pages that are currently being edited automatically appear with the  symbol next to the page in the tree structure, including a ToolTip that displays which users are currently editing the page.



## Setting as Permanent Edit

On the **Edit** tab, you can make settings by using the following buttons:

	Permanent editing is enabled. This means that the page is set to appear as being edited even if you stop editing it or log off. When another editor edits the page, an information message appears. You should disable permanent editing when you have finished editing the page. Click the button to disable permanent editing on the page.
	Permanent editing is disabled. Click the button to enable permanent editing on the page.

You can view a list of all pages set as Permanent Edit on the **My Tasks** tab, see "My Tasks Tab" on page 111. If you forget to remove the setting on a page, the administrator can run a scheduled job according to the configured time interval and the setting will be removed.

You can save, publish, copy or move a page marked with this symbol as usual.

## Options for Saving

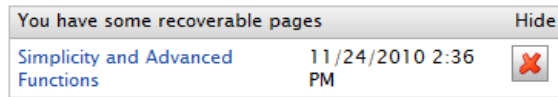
There are several ways to save a page in Edit mode depending on what you want to do next. You have the following options for saving:

### Using Autosave

When you are working on a page in Edit mode, the autosave function ensures that the work is not going to disappear in case of a sudden crash of the system or browser. Autosave is enabled to save the page every minute by default, but your organization might have other configured settings. Autosave works as follows:

- If an autosaved draft exists, the following message is shown on the page so you can recover the previous work. Clicking the page link will open the draft into the page and clicking the **Delete** button will remove the draft from being displayed.





- If an autosaved draft does not exist, the page will open and the draft of any changes will be automatically saved according to the configured time interval.

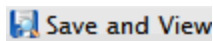
You can view a list of all autosaved drafts in the Action Window, see "Getting Started with EPiServer CMS" on page 13.

### Using Save



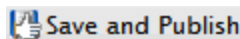
Use the **Save** button when you want to continue working with the page directly after saving. When you select **Save**, the information is stored and the page will still be open for editing.

### Using Save and View



Use the **Save and View** button when you want to preview a page that you are working on. When you select **Save and View**, the information is stored and the **Preview** tab appears. From that view you can either choose to publish the page or continue working with your editing.

### Using Save and Publish



Use the **Save and Publish** button when you want to publish a page that you are working on, without previewing it. When you select **Save and Publish**, the information is stored and the **Preview** tab is shown. The page is published and becomes available to visitors in View mode.

## Options for Publishing

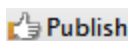
Once you have finished working with a page, you can preview it before publishing it. If you are satisfied with the result, submit it for publication. If not, click the **Edit** tab in order to continue working on the page.

Depending on your access rights to publish pages, you will have different tool buttons available to select from when you want to publish. For example, if editors will not be able to publish pages, another person can be assigned an **editor-in-chief** role to approve pages before they are published. The editor-in-chief can review and approve the pages ready for publishing as a task, see "My Tasks Tab" on page 111.

Even if you are authorized to publish information, you may want someone to review the page. You can use tasks or workflows to distribute the task of reviewing and publishing.

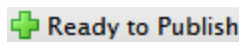
You have the following options for publishing:

### Using Publish



The **Publish** button is used most often, to use it you need to have access rights for publishing of pages. When you select **Publish**, the changes will be immediately visible to visitors.

## Ready to Publish



The **Ready to Publish** button is used if you do not have access rights to publish information. In this case, only this option will be available. If you select this option, the page will be submitted for approval and available for publishing by someone with publishing access rights, such as the editor-in-chief, who need to approve the pages before they are published. The **Ready to Publish** option is also used when you are working with delayed publishing.

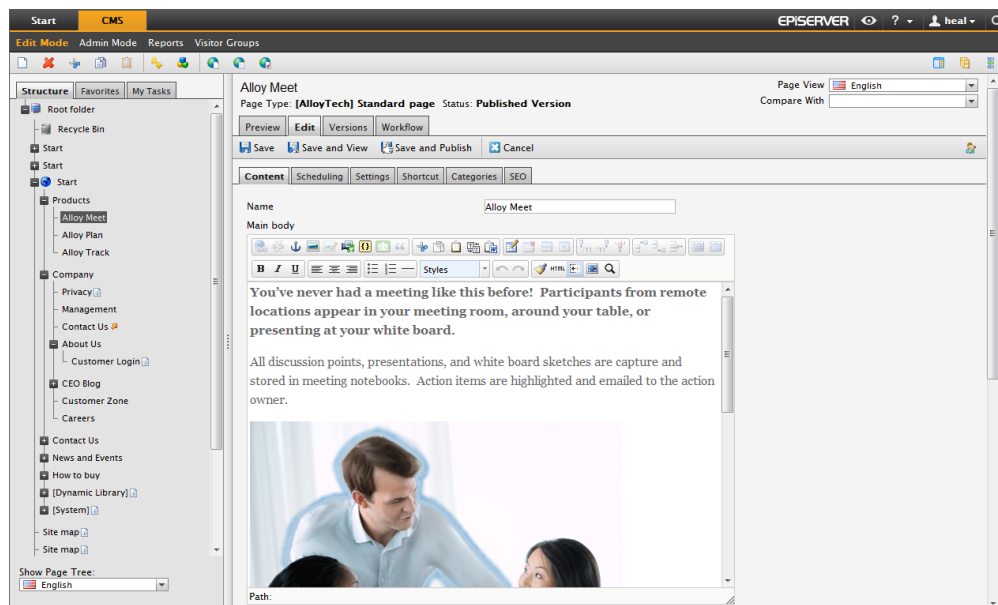


If two users try to save and publish the same page simultaneously, the system will display a message. The message will be shown to the second user when trying to publish the page. A window appears displaying the two conflicting versions next to each other. The editor can create a new merged version and decide which parts of the content should be included. Select **Save and view** to preview the new merged version. You can also use the compare version function to review the changes before publishing the page.

## Creating a Standard Information Page in Edit Mode

Depending on how your website is designed and the page types and templates that are available, the information pages may look different. Below is a description of how to create a simple page using the page type **Standard page** in a standard installation. You can also create a page on right-click as described in "Edit Using the Right Mouse Button" on the facing page.

The **Standard page** has several tabs, where the main information is entered under the **Content** tab. The other tabs contain additional more advanced functions.



Create a standard page in Edit mode as follows:

1. Select the page in the tree structure where you want the new page. The new page will be created under the page you have selected.
2. Select **New Page** from the toolbar.

3. Select the template **Standard page**.
4. In **Name**, type the name for the page. Do not leave **Name** blank, since it is the name that the page will have in the tree structure and in the menu.
5. In **Heading**, you can type a name of the heading if you want it different from the name of the page.
6. The **Main** and **Secondary body** sections are editable areas in which you write the information you want to convey. You can format the text here, load images, create links and work with tables. The text in **Main body** will be displayed in the middle of the page and the text in **Secondary body** will be shown in the right column of the page, just like the layout of this template.
7. Save and preview the page by selecting **Save and View**.
8. When you have previewed the page, you can continue to work with it by selecting **Edit** again.
9. When you are done, click **Save and Publish** to make the page accessible to visitors and appear in the menus. Or, submit the page for approval by clicking **Ready to Publish**.

## Editing a Page in Edit Mode

Edit a page in Edit mode as follows:

1. Browse to the page you want to edit in the tree structure on the left and select the page by clicking its name. Browse through the tree structure, and expand it by clicking the **+** plus sign in front of the page name. The page will be displayed on the **Preview** tab to the right.
2. Select the **Edit** tab to make your changes to the content.
3. Follow the points 4-10 in the instruction above.

## Deleting a Page in Edit Mode

Delete a page in Edit mode by right-clicking it and selecting **Delete** (or clicking the toolbar button). Confirm the deletion.

## Editing Existing Information

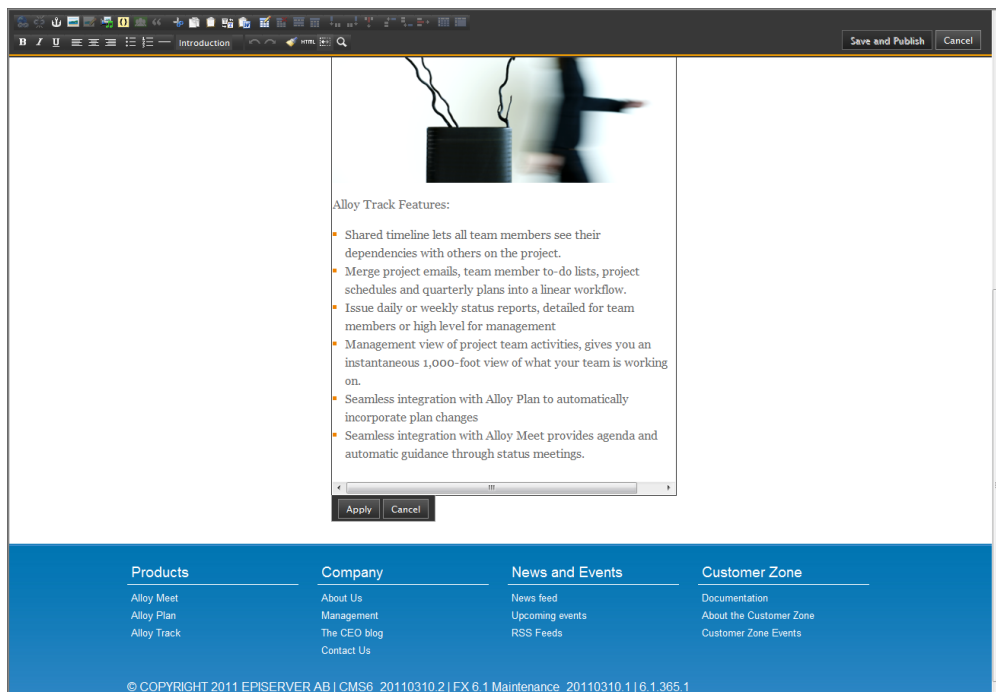
In EPiServer CMS you can edit existing page in the following ways:

- Right-click and select **Edit** in View mode, see "Creating a Standard Information Page in Edit Mode" on previous page.
- Right-click and select **On-page Edit** in View mode, see "Edit Using the Right Mouse Button" below.
- Right-click and select **Quick-Edit** in View mode, see "Edit Using the Right Mouse Button" below.

## Edit Using the Right Mouse Button

When you are logged in to the website, you have the following right-click options:

### On-Page Editing in View Mode

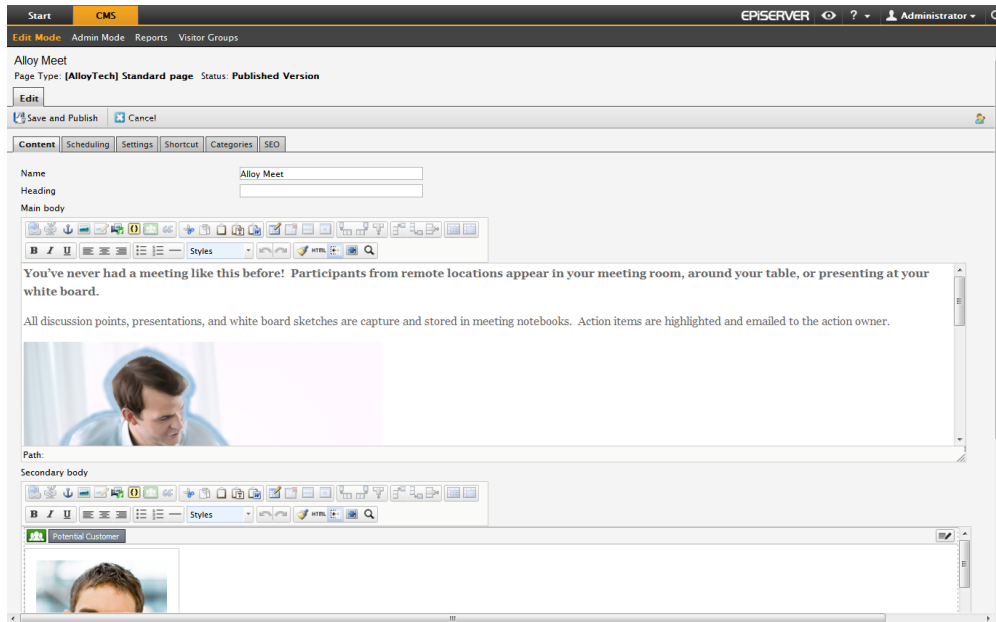


In View mode, you can use the On-Page Editing function to make quick changes directly on the page accessing all the editor functions and publish it. Use On-Page Edit if you, for example, want to add an image, or change the text on the page as described in "Working with the Information" on page 30.

Access **On-Page Edit** as follows:

1. Right-click the page.
2. Select **On-Page Edit**. A box with a dotted line will appear around the text areas you can change.
3. Click the box containing the text you want to change to access the editor functions. Make your changes to the text.
4. Click **Apply**.
5. Click **Save and Publish** at the top, or select it on right-click.

## Quick Editing in View Mode



In View mode, you can use the Quick-Editing function to access to the entire **Edit** tab functionality to make quick changes to the content and properties of the page and publish it. Use Quick-Edit if you, for example, want to schedule a date for publishing, or remove a page from being displayed in menus.

Access **Quick-Edit** as follows:

1. Right-click the page in View mode.
2. Select **Quick-Edit**.
3. The **Edit** tab appears and you can make the changes.
4. Click **Save and Publish** at the top.



Your changes will be published immediately once you save, and there is no preview possibility.

## Creating a Page Using Quick-Edit

Create a page by using Quick-Edit as follows:

1. Right-click the page.
2. Select **New Page**.
3. A list of available page types appears. Select the page type and enter the information you want to appear in the various fields on the page.
4. Click **Save and Publish**.

## Disabling the Menu

If you want to access the right-click menu of the web browser, right-click and select **Disable Menu**. Next time you right-click, the web browser menu will appear again. Updating the page takes you back to the EPiServer CMS right-click menu. You can also use the CTRL + right-click

shortcut key to gain quick access to the web browser's right-click menu.

## Working on the Structure of the Website

Constructing a website from scratch requires a great deal of thought before the practical work begins. It is important to have a clear idea of what information is to be displayed and how this should be structured so that visitors can easily find what they are looking for. If the website will contain large information volumes, it is even more important to plan the structure properly from the beginning.

It is common to create an area-based structure directly under the root, and to build up structures under this root for each area. To make it simple for visitors to find what they are looking for and navigate around your website, it is a good idea to limit the menu structure to a maximum of three levels. This also makes it easier for you to maintain the website in a clear manner.

The structure in EPiServer CMS is made up of pages. The names of the pages automatically form structures and menus. At the top of the structure you will always find the root object, which is the basis of your website. Under the root object you will find typically the start page and the recycle bin. The start page of the website is marked with a specific symbol. You may have more than one start page in the page tree structure if you have a multiple site enterprise solution.

Under the start page, you then create the sub-structures you want by adding new pages. It may be appropriate to create the page structure before you fill the pages with content. It is easy to move and copy pages in the structure.













Symbol indicating which page is the start page on your website.







Symbol indicating which page is the recycle bin on your website.

## Symbols in the Tree Structure

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

	New page created within the last 48 hours.
	The page has not been published.
	The page has scheduled publishing and has not been published yet.
	The page has scheduled publishing where the date and time have passed. The page is not visible.
	You do not have access rights to change the page.
	Page is not shown in menus.
	The page is missing for the current language and will not be displayed.
	The page is missing for the current language and will be displayed in another language. If the other language has an icon, it will be used as indication (the Swedish flag is used as an example).
	Shortcut to page in EPiServer CMS on this website.
	Link to external page on another website.

	No link, only text.
	Fetches data from page in EPiServer CMS.
	The page is edited by another user in EPiServer CMS.
	A container page used to store and edit data in the tree structure, not visible on the website.
[Icon]	The page is not a local EPiServer CMS page. The page provider uses an icon, if one has been defined.

## Moving, Copying and Deleting a Page

When you are in Edit mode, you have the following options to change pages in the tree structure:

### Moving a Page



You can move a page in the structure to a different location by using the **Cut** button in the toolbar. Select the page you want to move and click **Cut**. Select the page to which you want to move your page and click **Paste**. If you interrupt the operation before you have chosen to paste, nothing will change on the website.

By using the menu that appears when you right-click a page in the tree structure, you can also move a page as shown above using the **Cut** and **Paste** tools. Right-click the page you want to move and click **Cut**. Right-click the page to which you want to move the page and click **Paste**.

You can also move a page by dragging and dropping. Click the page you want to move, keep it clicked and drag the page to where you want to move it. Then release the mouse button.

### Copying a Page



If you want to reuse a page or structure you have created previously, you can copy the page and its sub-pages to a different point in the structure. When you copy a page, all its sub-pages and accompanying files in the page's folder will also be copied and the links will point to the new copy of the page. Remember that all settings, such as authorizations and dynamic properties, are also copied to the new page.

You can copy pages using the **Copy** button in the toolbar. Highlight the page you want to copy and click **Copy**. Select the page to which you want to copy your page and click **Paste**. A new, identical copy of the copied page will now be placed at the chosen location. You can now edit the copied page.

By using the menu that appears when you right-click a page in the tree structure, you can copy a page as shown above using the **Copy** and **Paste** tools. Right-click the page you want to copy and click **Copy**. Right-click the page to which you want to copy the page and click **Paste**.

You can also copy a page by dragging and dropping. Click the page you want to copy, press CTRL and drag the page to where you want to copy it.

### Deleting a Page



If you have a large number of pages on your website that are no longer public, you can delete them from the website. Once you have deleted a page, it is sent to the Recycle Bin. If you change your mind, you can restore the deleted page from the Recycle Bin. The length of time the pages remain in the Recycle Bin is controlled by a system setting, check this with your



system administrator. You may also need to empty the Recycle Bin yourself, see "Handling Pages in the Recycle Bin" on page 28.

Select the page you want to delete and click **Delete** in the toolbar. You can also right-click the page you want to delete and click **Delete** from the right-click menu that appears.



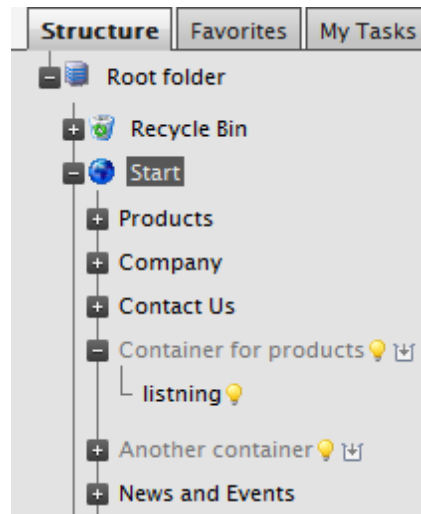
When you delete a page, remember that all underlying pages will also be deleted.

## Creating Containers

Containers are pages that can be used to store and edit data on the web page. It is possible to use the data through developer APIs, the fetch data functionality as well as dynamic content page properties. Containers are not displayed in View mode and can therefore only be edited in Edit mode. Containers appear dimmed in the tree structure.

Container pages:

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



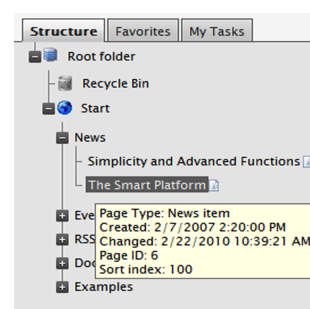
To create a container in Edit mode, create a new page and select to base it on the container page type. You can then add sub-pages to be used, for example, in a listing.

The page types to be used for containers are created in Admin mode, see Administrator's Manual.

## Sorting Page Order in Menus

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

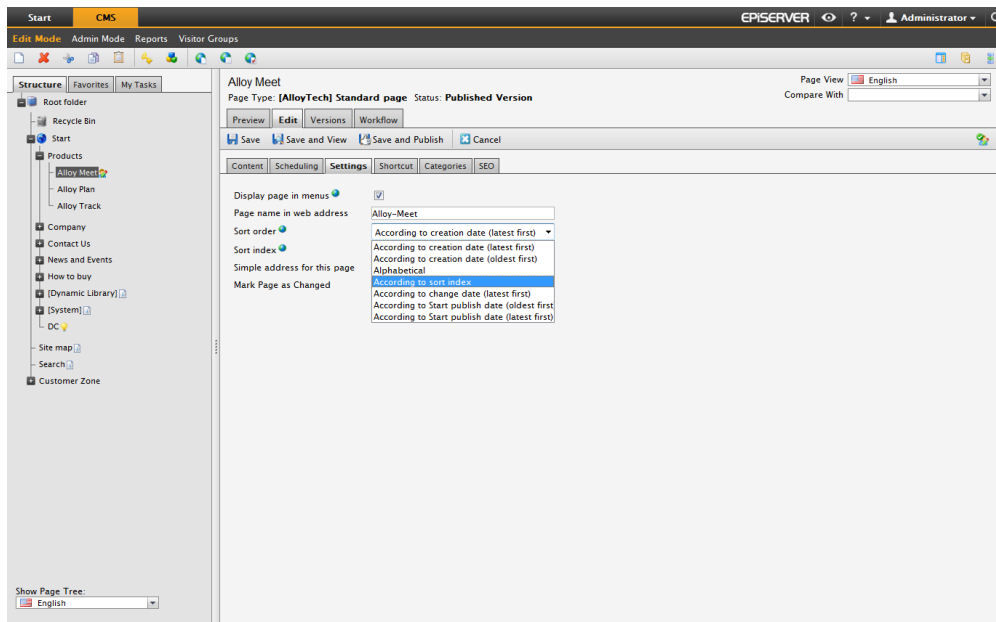
The sort order is set for the main page of the respective branch, and will be inherited to the sub-pages. The main page is called a **parent** page. All pages placed directly under a parent are the page's **children** and they can be sorted relative to one another.



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

Set the sort order as follows:

1. Select the main (parent) page of the branch in the structure where you want to set the sorting.
2. Edit the page and select the **Settings** tab.
3. Select sorting criteria under **Sort order**. If you choose to sort according to sort index you will also have to set the sort index for each sub-page, or use drag-and-drop to sort them the way you want.
4. Save and publish the page.



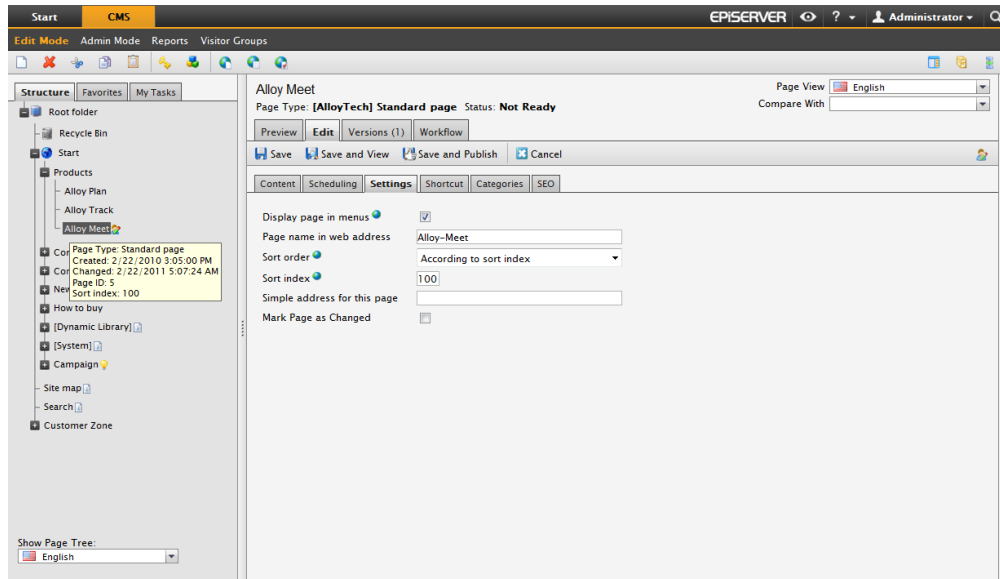
The pages must be saved and published in order for the selected sorting to take place. For this reason, changes to the sort order cannot be previewed.

## Sorting According to Sort Index

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

Change the sort order of pages as follows:

1. Drag the page and drop it where you want it in the page tree. Sorting pages with drag and drop will only be of interest for branches that are sorted with sort index.



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



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

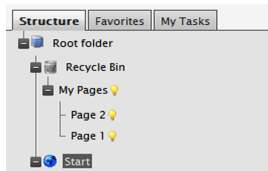
## Sorting According to Sort Index Manually

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

## Handling Pages in the Recycle Bin

When you are in Edit mode, you have the following options to change the Recycle Bin in the tree structure:

### Restoring a Page from the Recycle Bin



The **Recycle Bin** is a separate tree structure under the **Structure** tab and you can recognize it by the recycling symbol to the left. If you click the plus symbol in front of the Recycle Bin, you can expand it to see its contents. To restore a page, move the page to the part of the tree where you want the page. The page will then be republished.

### Remove a Page from the Recycle Bin

If you want to delete an individual page from the Recycle Bin without removing all the contents, follow the same procedure as when you delete a page from the structure. Select the page in the Recycle Bin and click **Delete** from the toolbar.

### Empty the Recycle Bin

You can empty the entire contents of the Recycle Bin. Click **Recycle Bin** in the tree structure. The Recycle Bin page is displayed on the right. You can see here how many pages are in the Recycle Bin. Select **Empty Recycle Bin** to empty its entire content.

## Working with the Information

This section will describe how you create content in EPiServer CMS. In practice, editors can create the entire website using ready-made page types without the need of any HTML and programming. The editors will enter the content in the page types, and each page type is related to a page template, which holds the functionality of the page.

### The Editor in EPiServer CMS

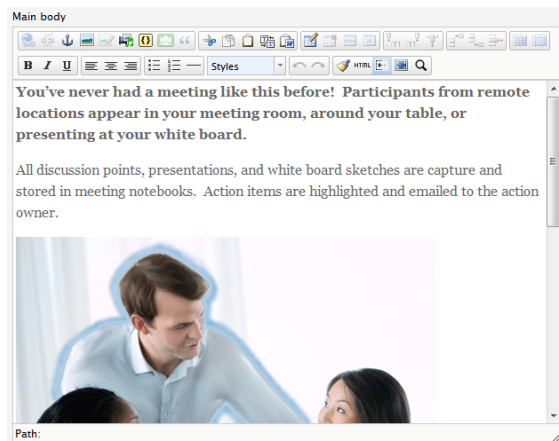
The editor in EPiServer CMS is where you enter much of the information of the web page, such as text content, formatting, images, tables and links to other pages or documents.

In View mode, you have also the On-Page Editing option on right-click for quick changes directly on the page, see "Edit Using the Right Mouse Button" on page 21.

### Which Editor am I Using?

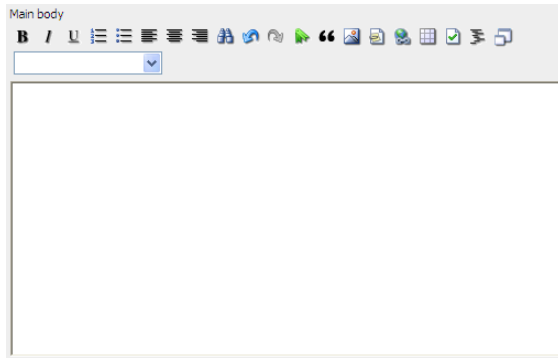
To find out which Editor you are using on your website, open a page type where you have an *Editor area* available. In a standard installation, these will be the main and secondary bodies in the page type called **Standard page**. Compare what you see with the descriptions in the following. The buttons in your implementation may differ from what you see here.

#### TinyMCE (EPiServer CMS 6)



The **TinyMCE** Editor in a standard installation of EPiServer CMS, is a customized version of the TinyMCE open source editor and has many functions. It is easy for developers to customize, and works with all browsers supported by EPiServer CMS. See "Editor Functions" on the facing page.

#### DHTML-based Editor (EPiServer CMS 5 and earlier versions)

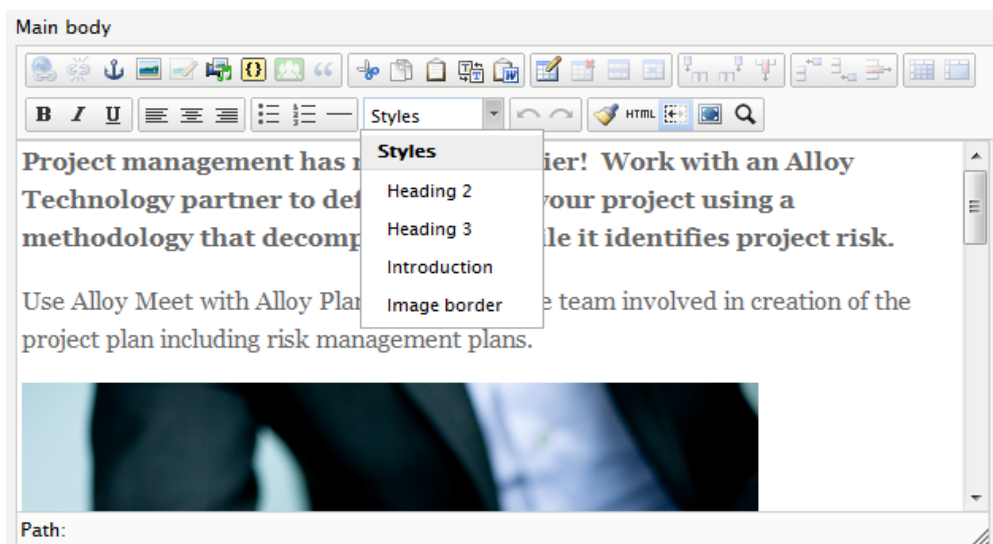


The built-in **DHTML-based** Editor is used in EPiServer CMS 5 and earlier versions. For information if you are using it, right-click in the Editor area and select **About...**

### Other Editors

You may have a different Editor than the ones described here if you have special requirements in terms of editing functionality within your organization. It is also possible to have different Editors in different Editor areas. If you cannot identify the Editor that you are using, contact your system administrator for advice.

## Editor Functions




















The **TinyMCE Editor** in EPiServer CMS is highly customizable meaning that the available Editor buttons may vary depending on the adaptations that have been done to a website.

EPiServer CMS comes with a selection of functions (buttons) in TinyMCE. These available buttons that are normally activated in a standard installation of EPiServer CMS are described here. You can change which buttons to be available in the Editor by activating or deactivating them in EPiServer CMS Admin mode.













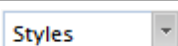



Furthermore there are additional functions in TinyMCE which you can integrate with your website, these are not described here. Please refer to the official TinyMCE website to find out more about these functions.




## Available Buttons in the Editor

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

	Insert/edit link	Display the link dialog box for insertion or editing of link. It is dimmed until you select the text to be included in the hyperlink. See "Adding Links" on page 46.
	Unlink	Remove a link from the selected text. It is dimmed until you place the cursor in the hyperlink.
	Insert/edit anchor	Insert or edit an anchor (bookmark) in the text. See "Creating Anchors" on page 52.
	Insert image	Insert an image in the Editor, and change image properties. See "Working with Images" on page 36.
	Edit image	Edit an image in the Editor.
	Insert/edit embedded media	Insert media content such as Flash images into the Editor. See "Inserting Embedded Media" on page 44.
	Insert/edit dynamic content	Insert dynamic content by using content from other pages to update the page. This means that the information only needs to be changed in one place for it to be updated on all the pages that use that information. See "Adding Dynamic Content to a Page" on page 64.
	Personalized content	Insert or edit personalized content. It is dimmed until you select the text to be included in the personalized content. See "Creating Personalized Content" on page 100.
	Insert/edit quote	Mark the selected text as a quote. See "Working with Quotes" on page 67.
	Cut	Cut the selected text and put it on the clipboard.
	Copy	Copy the selected text and put it on the clipboard.
	Paste	Paste content from the clipboard to the Editor.
	Toggle paste as rich/plain text	Toggle paste content to the Editor as rich or plain text. See "Copying Text from Other Programs" on page 35.
	Paste from Word	Paste content to the Editor with any word formatting of content cleaned up.
	Insert a new table	Insert a table into the Editor. See "Working with Tables" on page 54.
	Delete table	Delete a selected table. It is dimmed until you place the cursor in the table.
	Table row properties	Opens dialog box for table row. It is dimmed until you place the cursor in the table.



	Table cell properties	Opens dialog box for table cell. It is dimmed until you place the cursor in the table.
	Insert column before/after	Insert table column before and after selection. It is dimmed until you place the cursor in the table.
	Remove column	Remove the selected table column. It is dimmed until you place the cursor in the table.
	Insert row before/after	Insert table row before and after selection. It is dimmed until you place the cursor in the table.
	Delete row	Delete the selected table row. It is dimmed until you place the cursor in the table.
	Split merged table cells	Split table cells that have been merged. It is dimmed until you place the cursor in the table.
	Merge table cells	Merge table cells that have been split. It is dimmed until you place the cursor in the table.
	Bold Italic Underline	Select single words in the text to format it with bold, italic or underlining. (The options that are available depends on your installation.) You can remove all formatting by selecting the text and then select a style in the <b>Styles</b> drop-down list.
	Align left Align center Align right	Align the text to the left, center or the right.
	Unordered list	Place the cursor to create bulleted list of the text.
	Ordered list	Place the cursor to create a numbered list of the text.
	Horizontal rule	Place the cursor to create a horizontal rule.
	Styles	Displays a drop-down list with available style formats for formatting text (which reflects the CSS style sheets on the website).
	Undo Redo	Undo or redo of previous actions.
	Clean up messy code	Remove invalid code, for example, Word formatting. This function is useful when you have been working with cut and paste to restructure the text, accidentally deleting HTML tags in the process. This function will go through the text and "clean" up any missing or incorrect formatting tags. For example, if you accidentally deleted a block quote end tag, the <code>&lt;/blockquote&gt;</code> will be added in the appropriate place to make the HTML code complete.
	Show / Hide HTML source	Display the HTML code. If you are proficient in the use of HTML, you can switch to HTML mode and create or modify your page writing HTML code directly. You can also check the HTML code and make minor adjustments to the page.

	Toggle invisible elements	Click to turn on and off the Editor marking of links, anchors and quotes.
	Toggle full screen mode	Click to toggle between full screen and normal screen mode when working with large volumes of text and images. Click the button again to restore the Editor to its original size.
	Find	Search for and replace a text within the Editor.

## Path and Word Count

When formatting text in the Editor, the HTML tag for the text with will be displayed in the **Path:** section at the bottom left part of the Editor, when you click on specific text. For instance, if you have formatted the text with bold, the **Path:** section will display "Path: p >> strong". This is useful when checking that the text is correctly formatted.

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

## Spell Checking

If you are using Firefox or Internet Explorer 8, spell checking is available through the right-click of the browser (plug-in is required for Internet Explorer). Open the text you want to spell check for editing. Place the cursor in the text, right-click and select spell check. Follow the options available in the browser menu.

## Formatting Text Using Style Templates

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

You can find the available formats in the drop-down lists in the lower rows of buttons in the Editor. Select the object to be formatted, then select the format you want in the drop-down lists. Available formats are linked to the style of the site through the CSS files for the website.

Use the options in the **Styles** drop-down list to set the style of the content on your website (headings, body text, and more). This way the correct HTML tags will be applied to your content, which is an advantage both from an search optimization and accessibility perspective.

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

It is possible to change and add formatting styles on your website and make them available in the Editor. Check with your system administrator to find out more about the styles that are available for your website.

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

## Inserting Paragraph Break and Line Break

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

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

## Using Shortcut Keys in the Editor

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

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



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

## Copying Text from Other Programs

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

	<b>Toggle paste as rich/plain text</b> will paste the text to the Editor as rich text by default. Toggle to paste as plain text.
	<b>Paste from Word</b> will transform the text formatting from Word into the website's style, keeping the page and line breaks from the Word document. For a successful result the headings and body text must be properly formatted using the available template styles in Word. When you copy text from Word and paste it into an page, for example, a "head-

	ing 2" in Word will be converted into the "heading 2".
--	--



Do not paste the text using CTRL+V directly in the Editor area, as this will paste it in with the format it had in the previous program. There is a risk that formatting code that does not correspond with the graphical profile of your website is also pasted with the text.

### Toggling Paste as Rich/Plain Text

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

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

### Pasting Text from Word

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



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

## Working with Images

The Image Editor is used when working with images in EPiServer CMS. To display images on a page they must be available in the File Manager. Many organizations set up an image archive, containing images that editors can use on their pages. Others allow their editors to freely use their own images.

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

You can work with the following image editing tools:

	Click to insert an image from the File Manager. Also use this tool to set properties for the image on a page, for example add a class. See "Changing Image Properties" on page 42.
	Click to make changes to the image itself on the page instead of using an external image editor, for example, cropping, resizing and transforming (flipping, rotating and turning to grayscale). You can also save the changed image as a copy with a new name. See "Editing Images" on page 39.

## Inserting an Image into a Page



All images that are to be used on the website need to be available in the File Manager.

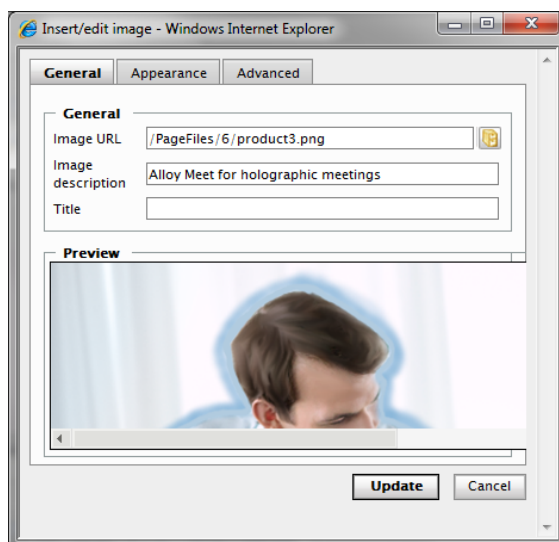
For a variety of reasons, some visitors will not be able to see the images on your website. It may also be that users disable the display of images when browsing the web if their Internet connection is slow. People who are visually impaired can 'read' web pages using various accessibility tools; however, images are often difficult to 'read'. So for both these groups to understand what an image represents, it is important to provide a text option where the image is described in words. Type this image description in the **Image description** box.

You can insert an image into a page in the following ways:

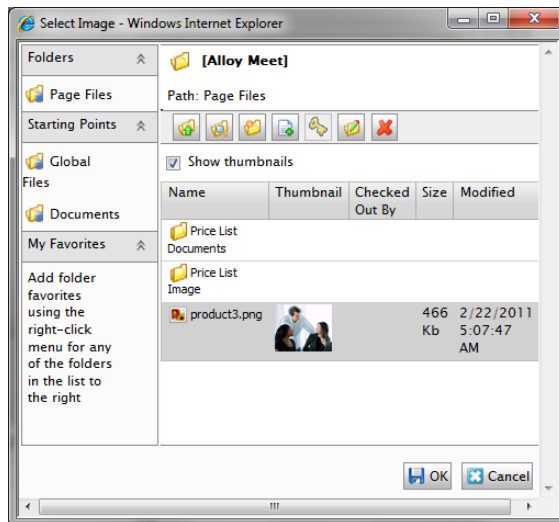
### Using the Image Button in the Toolbar

Insert an image into a page as follows:

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



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



7. The image appears in the preview section of the Image Editor.
8. Click **Insert** and the image will be linked to the page.

### Using Drag and Drop

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


1. Edit the page with the File Manager open on the right.
2. Select the image you want and drag it to the desired position on the page. The dragged image will be displayed directly on the page.
3. When you are done, save or publish the page.



Make sure that the plug-in for drag and drop from the File Manager is enabled.


### Uploading an Image to the File Manager

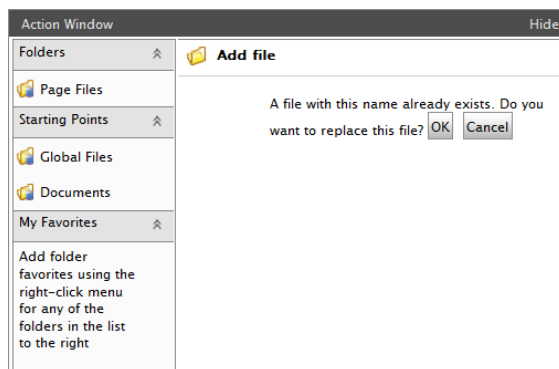
If the image you want to use is stored on your computer's hard disk or some other network unit and has not previously been stored in EPiServer CMS, you need to upload the image to the File Manager. When you insert an image, it is important that the folder where you want the image to be stored is selected. You can also upload images from inside the EPiServer CMS File Manager.

1. Insert an image as described above.
2. In the **Image Editor** window, click the **File Manager** button  to browse to the folder where you want to upload your image. You can also create a new folder, or you can use the **Page Files** folder for the page.
3. Click **Add new file** in the File Manager toolbar and click **Browse**.
4. Locate and select the image file you want to use on your page and click **OK**. The image is now uploaded to the folder you have selected.

## Replacing an Image

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

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



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

## Editing Images


On the internet, you should always try to have as small file size for images as possible to avoid long downloading times. Because of this the website can be seen as slow and there is a risk that the visitor leaves the site. When you have taken pictures with a digital camera, or scanned an image, the file is often too large. Therefore compress the image to a smaller file size by cropping or resizing it as described below.

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

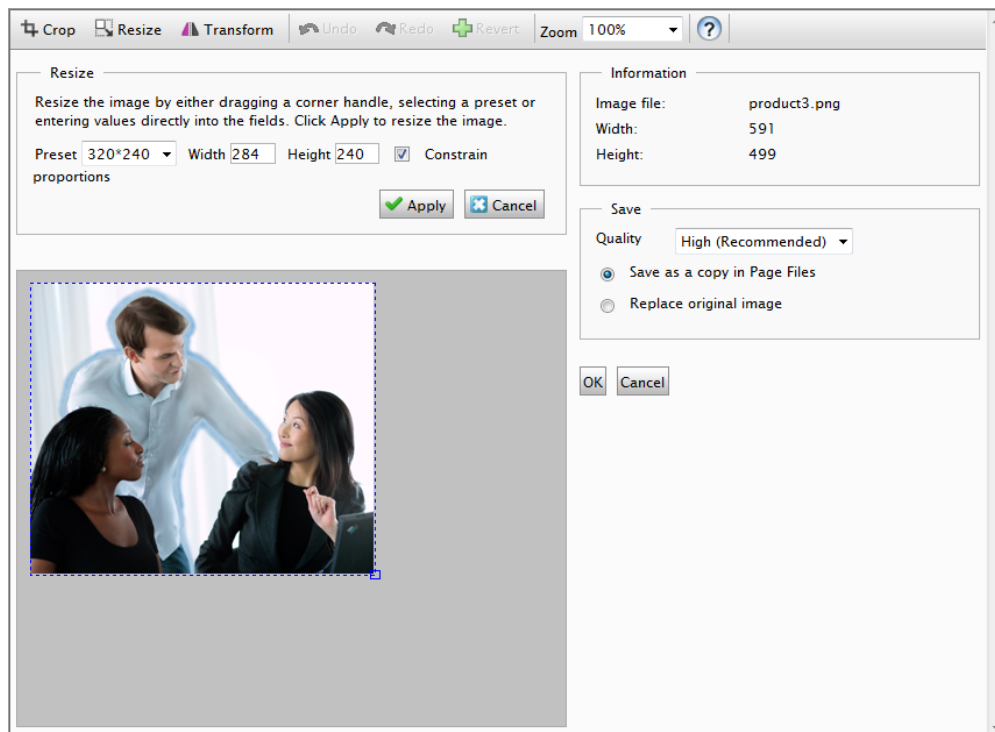
Access the image editor for editing and saving an image in the following ways:

### Using the Image Editor

Edit the image in Image Editor as follows:

1. Go to the page in Edit mode and open the Editor.
2. Select the image you want to change by clicking it.
3. Click the **Edit image** button .

4. In **Image Editor**, make the changes to the image.



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

## Using the File Manager

Edit the image in the File Manager as follows:

1. Go to the page in Edit mode and open the File Manager.
2. Select the image you want to change by right-clicking it and selecting **Edit**.
3. Make the changes to the image in the **Image Editor** window.
4. When you are done, you have the following options for saving the changes:
  - Click **Save as** to save the image as a copy of the original image. The system suggests a file name, but you can change it if you want. The copy will be saved in the same folder as the original image in the File Manager. When you are done, click **OK**.
  - Click **Save** to replace the original image in the File Manager with the edited image. Confirm by clicking **OK**.


## Cropping, Resizing and Transforming an Image

Make changes to the image itself in the following ways:




## Cropping an Image

Crop an image as follows:

1. Select the image in the Editor you want to crop by clicking it.
2. Click the **Edit image** button .
3. Click **Crop** in the toolbar of the **Image Editor** window.
4. Crop the image by either entering values in the **Top**, **Left**, **Width** and **Height** boxes or by drawing a selection in the image. It is also possible to select a predefined value from the **Preset** list. These values are defined in the **web.config** file of your website. Contact your system administrator for further information.
5. Click **Apply**. Save the image and click **OK**.


## Resizing an Image

Resize an image as follows:

1. Select the image in the Editor you want to resize by clicking it.
2. Click the **Edit image** button .
3. Click **Resize** in the toolbar of the **Image Editor** window.
4. Change the image size by either moving a corner handle or entering a value in the **Width** and **Height** boxes. It is also possible to select a predefined value from the **Preset** list. These values are defined in the **web.config** file of your website. Contact your system administrator for further information. Keep **Constrain proportions** selected to retain the image's proportions.
5. Click **Apply**. Save the image and click **OK**.

## Transforming an Image

Transform an image as follows:

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

## Replacing an Image on a Page

Replace an image on a page as follows:


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

## Deleting an Image

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

## Changing Image Properties

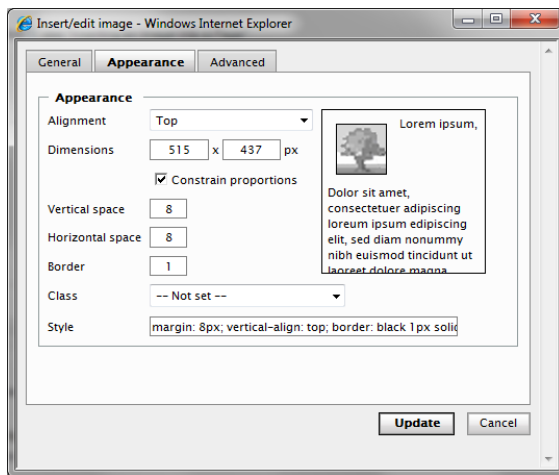
Change the actual appearance of an image by changing its properties as follows:

1. Open the Editor and select the image you want to change.
2. Click **Insert/edit image** button  and change the properties by selecting any of the following tabs:

### General

To change the **Title** and **Image description**, see "Inserting an Image into a Page" on page 37.

### Appearance



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

### Changing the Display Size of an Image

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



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

Change the display size of an image as follows:

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

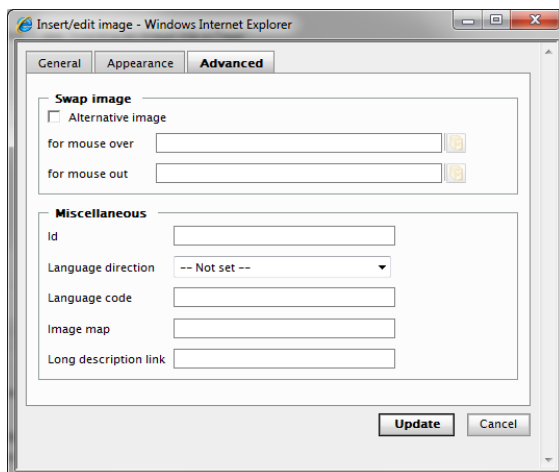
### Positioning an Image

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

Position an image as follows:

1. You have the following ways of positioning images in relation to text in the Editor:
  - **Manual option.** In **Alignment**, select **Right** to position the image in the top right corner. In **Style** you can see the values that have been set for the image.
  - **Preset style option.** If CSS classes are available for positioning images, you can select a class from the **Class** drop-down list, see "Formatting Text Using Style Templates" on page 34.
2. In **Vertical space** and **Horizontal space**, add a value in pixels for the space between the image and the surrounding text.
3. In **Border**, add a value in pixels for the image border.
4. Click **Update** to save your changes.

## Advanced



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

### Swap Images

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

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

### Miscellaneous

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

1. In **ID**, you can set a unique identifier for the image. The ID can be referenced by style sheets or by a java script providing additional functionality.
2. In **Language direction**, you can set the language direction (left to right or right to left) for the description, title and other text attributes specified for the image.

3. In **Language code**, set the desired language, for example, if you have an image showing content in a different language than the actual page. Enter the standard language code format, for example it (Italian), es (Spanish), en (English) etc.
4. In **Image map** you can associate an image map with the image. Image maps are used to map certain areas of an image to links or other actions. There is currently no built-in way to create image maps in TinyMCE.
5. In **Long description link**, type a link to provide a longer image description than what fits in the description field. Note that most visual browsers do not support this feature, this is primarily an accessibility feature.
6. Click **Update** to save your changes.


## Inserting Embedded Media

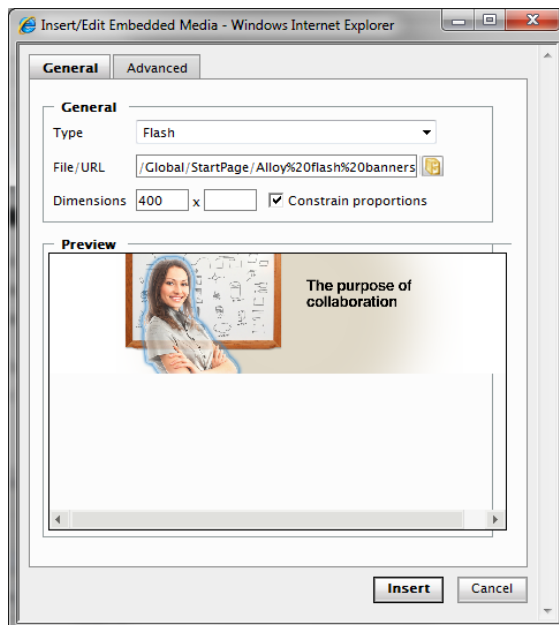
You can insert embedded media into your web pages, such as video or Flash animations. Just as with images, the embedded media must be available in the File Manager to be able to link to the media file. The most common file formats are supported in a standard installation of EPiServer CMS. For a detailed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



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

Insert embedded media as follows:

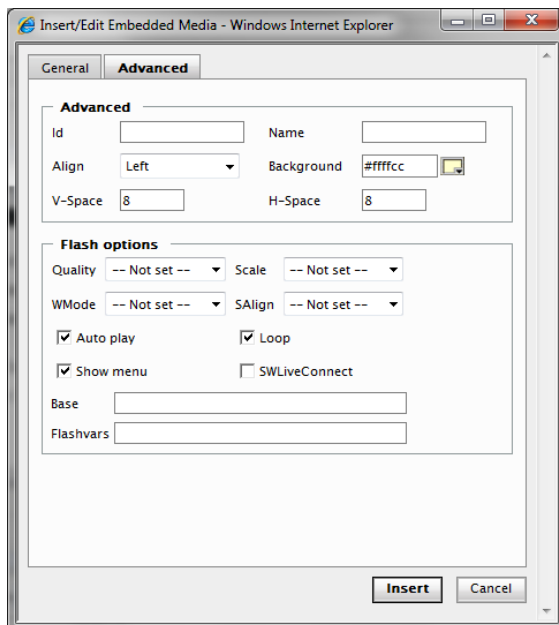
1. Place the cursor in the Editor where you want to insert your image.
2. Click the **Insert/edit embedded media image** button .



3. In **Type**, select the type of media and associated format, for instance Flash, Quicktime or Windows Media. Flash is selected by default.

4. In **File/URL**, browse to select the media file in the File Manager.
5. In **Dimensions**, set the dimensions of the movie in pixels. Ensure that **Constrain properties** is selected to keep the proportions of the movie.
6. Click **Insert** and the media will be linked into the page.

## Advanced Settings for Embedded Media



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

### Advanced options

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

### Flash options

1. In **Quality**, set the quality for the Flash movie to display. Specifies how to prioritize playback speed and appearance.
2. In **Scale**, set the scale to specify how the movie should adapt when displayed in a specified area.

3. In **WMode**, set the Window Mode property of the Flash movie for transparency, layering, and positioning in the browser.
4. In **SAlign**, specify how the movie should align in the browser window.
5. Selecting **Auto play** will make the movie to be played automatically when the page is opened.
6. Selecting **Loop** will make the movie to repeat indefinitely or stop when it reaches the last frame.
7. Selecting **Show menu** will make the menu to be displayed.
8. Selecting **SWLiveConnect** will make the browser to start Java when loading the Flash Player for the first time.
9. In **Base**, specify a base directory or URL used to resolve all relative path statements in the Flash Player movie. This attribute is helpful when your movies are kept in a different directory from your other files.
10. In **Flashvars**, set the root level variables to be sent to the movie.
11. Click **Update** to save your changes.

## Adding Links

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

- Web pages
- Documents
- E-mail addresses
- Images

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

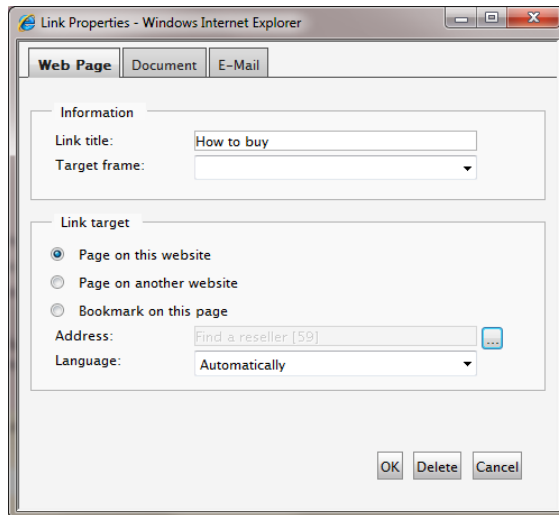
## Linking to a Web Page

In EPiServer CMS you have the following options to link to a web page:

### Link to a Web Page on your Website

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

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



3. In **Link title**, type the text that will be shown as a pointer to the link. This is important information for everyone reading the website with different accessibility aids.
4. In **Target frame**, select how the link is opened. If nothing is selected here, the link will open in the same window.
5. Select **Page on this website** as the link target. Select the page to which you want to link by selecting the button to the right of the **Address** field. This displays a new dialog box showing the page tree structure.
6. Select the page you want to link to in the structure, click **Select**.
7. If you are using multiple languages on your website, you can select language for the page. Under **Language** you can select which language version of the page will be shown. Select the language from the list, or select the **Automatic** option. If you choose the latter option, which is most common, the visitor is automatically directed to the language version they are using.
8. Click **OK**. The link is displayed in the Editor with a yellow background.

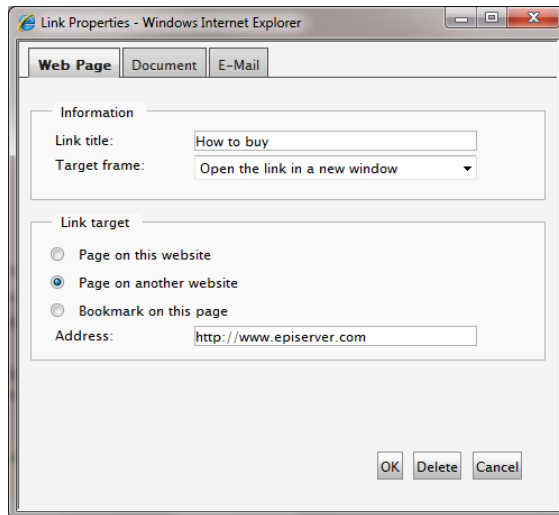


If you have trouble finding the page you want to link to, you can use the search function at the top of the dialog. Enter the entire or part of the page's name or the page's ID number and select **Search**.

### Linking to a Web Page on Another Website

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

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



3. In **Link title**, type the text that will be shown as a pointer to the link. This is important information for everyone reading the website with different accessibility aids.
4. In **Target frame**, select how the link is opened, in a new window or in the same window. For external links, it is recommended that you open the page in a new window.
5. Select **Page on another website** as the link target.
6. In **Address**, enter the address of the website to which you want to link.
7. Click **OK**. The link is displayed in the Editor with a yellow background.

## Linking to Documents

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

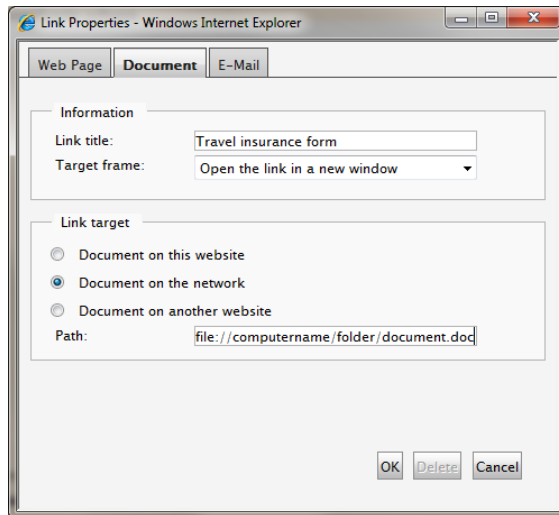
Depending on the type of document, and the settings of the computer from which a link is opened, the behavior will vary. For instance, if you download a Word document and you have Word installed on your computer, the application will be launched and the document will be opened inside Word. If Word is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

### Linking to a Document on the Local Network

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



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

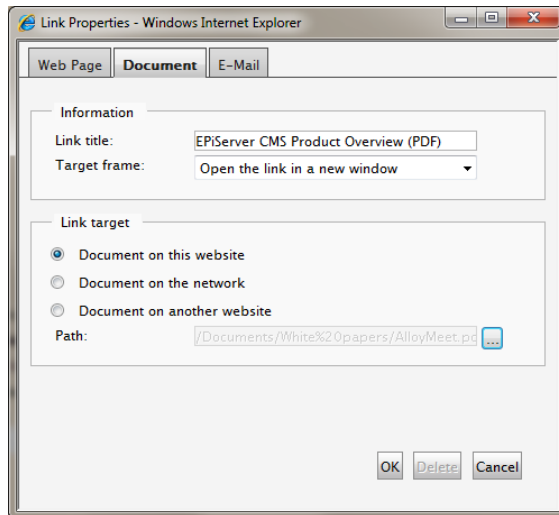


3. In **Link title**, type the text that will be shown as a pointer to the link. This is important information for everyone reading the website with different accessibility aids.
4. In **Target frame**, select how the link is opened. Selecting **Open the link in a new window** will cause the document to be opened in a new window.
5. In the **Link target** section, select **Document on the network** as the link target.
6. In **Path**, specify the path to the file that the link should point to. Enter the complete path with the computer name, and the entire folder path ending with the file name, including the file extension.
7. Click **OK**.
8. The link is displayed in the Editor with a yellow background.

### Linking to Document on your Website

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

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

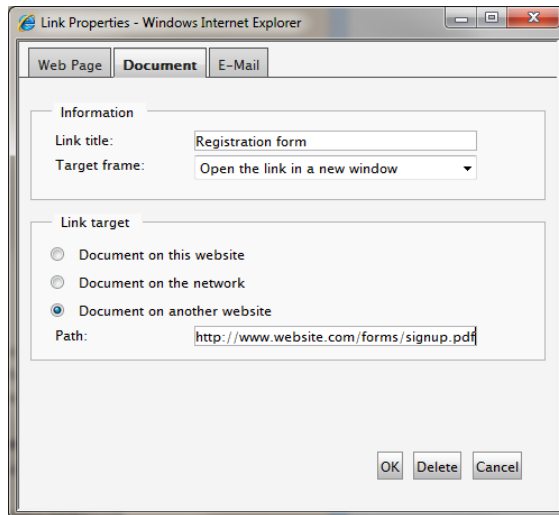


3. In **Link title**, type the text that will be shown as a pointer to the link. This is important information for everyone reading the website with different accessibility aids.
4. In **Target frame**, select how the link is opened. Selecting **Open the link in a new window** will cause the document to be opened in a new window.
5. In the **Link target** section, select **Document on this website** as the link target. Select the page to which you want to link by selecting the button to the right of the **Path** field.
6. In the File Manager, browse to the document you want to link to in the folder structure, click **OK** to select the file.
7. Click **OK**. The link is displayed in the Editor with a yellow background.

### Linking to Document on Another Website

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

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



3. In **Link title**, type the text that will be shown as a pointer to the link. This is important information for everyone reading the website with different accessibility aids.
4. In **Target frame**, select how the link is opened. Selecting **Open the link in a new window** will cause the document to be opened in a new window.
5. In the **Link target** section, select **Document on another website** as the link target.
6. In **Path**, specify the path to the file that the link should point to. Enter the complete URL to the website where the document is available..
7. Click **OK**. The link is displayed in the Editor with a yellow background.

### Insert Document Using Drag and Drop

Instead of using the **Insert link** button in the toolbar, you can create document links simply by dragging-and-dropping documents directly from the EPiServer CMS File Manager into a page.

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

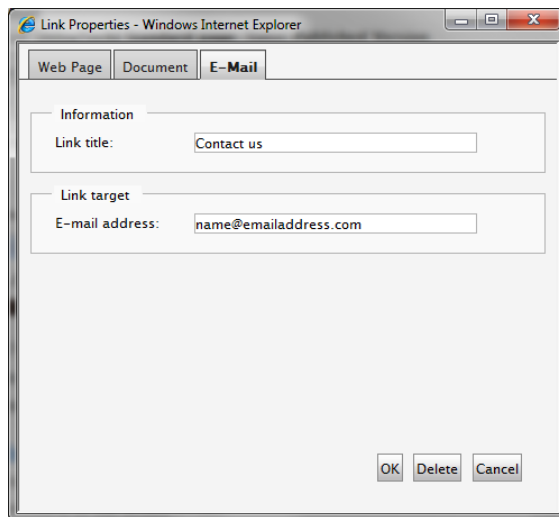
### Linking to E-Mail Address

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

Create a link to e-mail address as follows:

1. In the Editor, select the words that will form the link.
2. Select **Insert/edit link**.

3. In the **Link properties** window, select the **E-Mail** tab.



4. In **Link title**, type the text that will be shown as a pointer to the link. This is important information for everyone reading the website with different accessibility aids.
5. In **E-mail address**, type the e-mail address to which you want the link to take you.
6. Click **OK**.
7. The link is displayed in the Editor with a yellow background.

## Creating Anchors



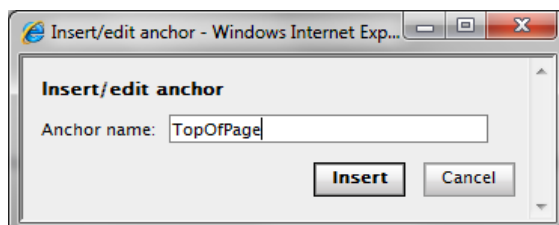
An anchor (also called bookmark) is a link to a place in the same web page. Anchors are useful when you have a long text which you want to divide into sections. The reader can then use the links to jump between the sections. A typical example is a table of content where each section is an anchor link.

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

### Step 1: Insert Anchor

Insert an anchor on the page as follows:

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

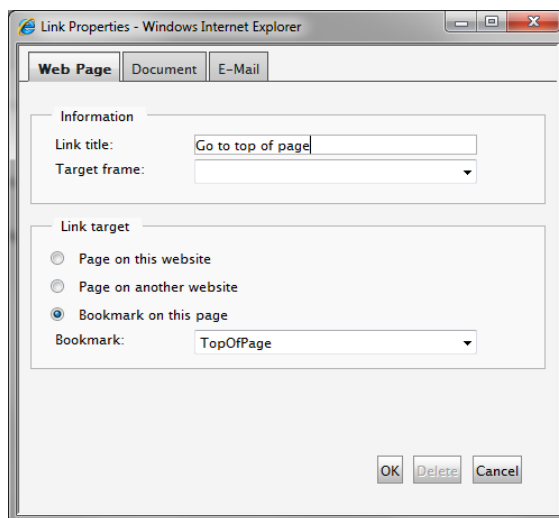


4. Click **Insert**.
5. The anchor is displayed in the Editor with a yellow background.

## Step 2: Link to Anchor

Create a link to an anchor as follows:

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



3. In **Link title**, type the text that will be shown as a pointer to the link. This is important information for everyone reading the website with different accessibility aids.
4. In **Target frame**, select how the link is opened.
5. Select **Anchor on this page** as the link target.
6. In **Anchor**, select the anchor to which you want to link (all the anchors on the page are listed).
7. Click **OK**.
8. The link is displayed in the Editor with a yellow background.

## Change Anchor

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

## Delete Anchor

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

## Creating a Link from an Image

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

1. In the Editor, select the image where you want to add the link by clicking it.
2. Select **Insert/edit link**.
3. The **Link Properties** dialog box appears with the **Web Page** tab active. Depending on the type of link you want to create, select the appropriate tab **Web Page**, **Document** or **E-mail**.
4. In the **Link title** field you enter the text that will be shown as a pointer to the link. This is important information for everyone reading the website with different accessibility aids.
5. In the **Target frame** field, select how the link is opened, in a new window or in the same window. If the link is an external link to another website, you should make the link open in another window.
6. In the **Link target** section, select the type of link you want and enter the required information.
7. Select **OK**. The link will be added to the image.


## Working with Tables

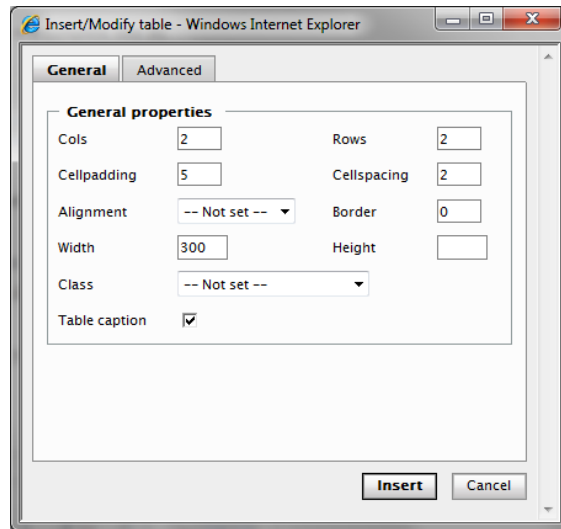
Tables are used for organizing data in rows and columns to get a better overview of the information. When you insert a table, you select the number of rows and columns for the table. You can also define the appearance of the table, either by setting the properties manually or by using predefined CSS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

### Creating a Table

Create a table as follows:

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

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

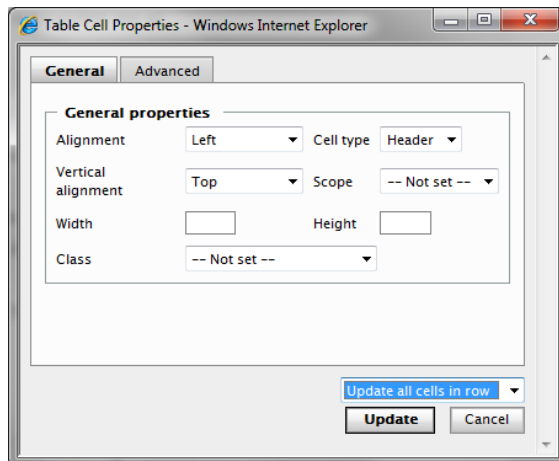


3. In **Cols** and **Rows**, set the number of columns and rows.
4. In **Cell padding**, you can define the space in pixels between the text in the cell and the cell borders. This is only necessary if you do not use a CSS class for table formatting.
5. In **Cell spacing**, you can define the space in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

## Formatting the Table Header

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

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



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

## Deleting a Table

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

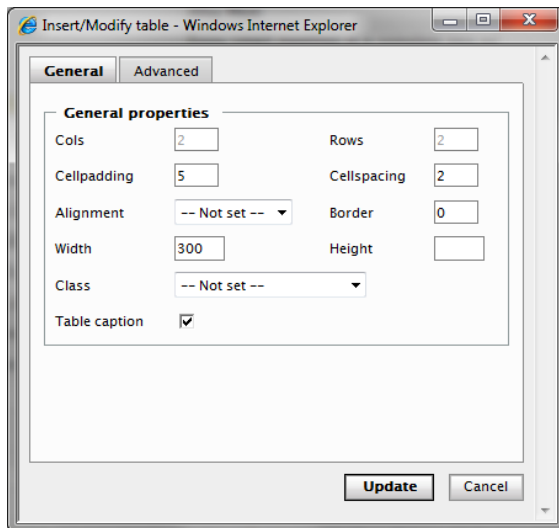
## Table Properties



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



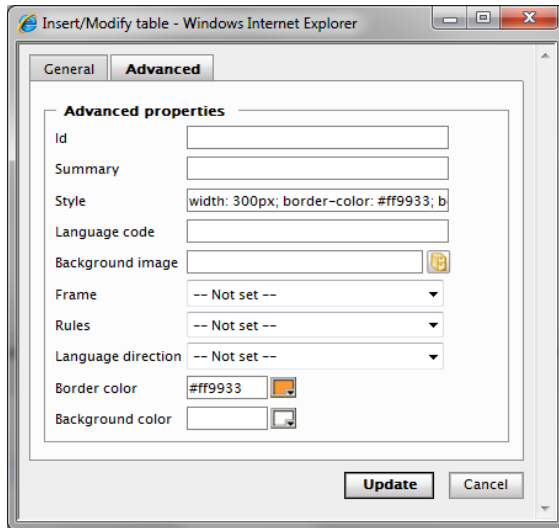
## General Tab



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

- **Cols/Rows.** Set the number of columns and rows in the **Cols** and **Rows** fields.
- **Cell padding.** Defines the space in pixels between the text in the cell and the cell borders. This is only necessary if you do not use a CSS class for table formatting.
- **Cell spacing.** Defines the space in pixels between the cells in the table. This is only necessary if you do not use a CSS class for table formatting.
- **Alignment.** Defines the position of the table, in case the table width does not require the entire space available. Enter "Center", "Left" or "Right".
- **Border.** Set the weight of the table border in pixels. Use this option if you want a table border and are not using CSS classes to format your table. Default value is zero.
- **Width.** Set a fixed width for the table in pixels. If you do not specify a value here, the width of the table will adapt to the content using the full available space.
- **Height.** Set a fixed height for the table in pixels. Most often the height of the table is controlled by the content, allowing the table to expand downwards.
- **Class.** Specify a preset formatting to use for the table. Choose an appropriate CSS class from the drop-down list. This is the easiest option, since this will ensure that the tables will have a uniform appearance on the website. However, this requires that you have predefined CSS classes in the CSS files of the site. Check with your system administrator to find out what applies for your website.
- **Table caption.** Here you can insert a table caption space for the table. The table caption allows you to enter a table heading above the table.

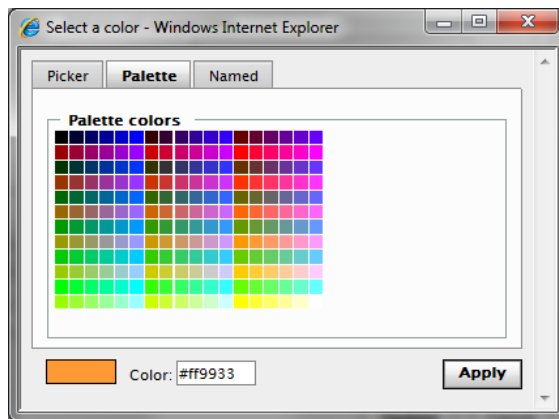
## Advanced Tab



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

- **ID.** The ID number for the table, for accessibility purposes.
- **Summary.** Description of the content of the table, for accessibility purposes when the table is being interpreted by accessibility tools. The summary is not displayed in graphical browsers, so information put here should be written for non-visual users.
- **Style.** In this field you can view the current settings for the table. This option can be used to set style attributes, overriding values specified in CSS classes. Normally you should use CSS classes, but if you want to apply a special style settings only used on this element, you can use this option.
- **Language code.** Define a language here if the content of the table is in a different language than the rest of the page. Enter the standard language code format, for example it (Italian), es (Spanish), en (English) etc.
- **Background image.** You can select a background image to be applied to the entire table. Click the **Browse** button to the right of the field to select an image in the File Manager. Click **OK** to add the image to the table.
- **Frame.** Specifies which parts of the **outside** borders that should be visible. Refer to accessibility programming standards for explanation of the attribute values.
- **Rules.** Specifies which parts of the **inside** borders that should be visible. Refer to accessibility programming standards for explanation of the attribute values.
- **Language direction.** Define the language direction for the table, if this is different for what applies to the page.
- **Border color.** You can define a border color for the table. You can select colors using the options **Picker**, **Palette** or **Named**, depending on your preferences. Click **Apply** to add the

color selection to the table.



- **Background color.** You can define a background color for the table.



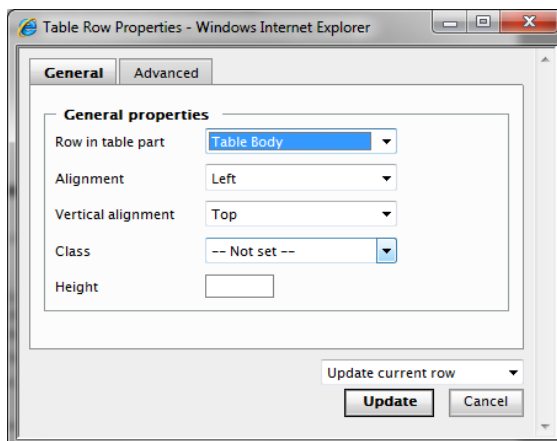
If you are using predefined CSS classes to format tables, rows or cells, be aware that additional formatting added "manually" on top of the predefined formatting, may be overridden and will not apply.

## Table Row Properties



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

### General Tab

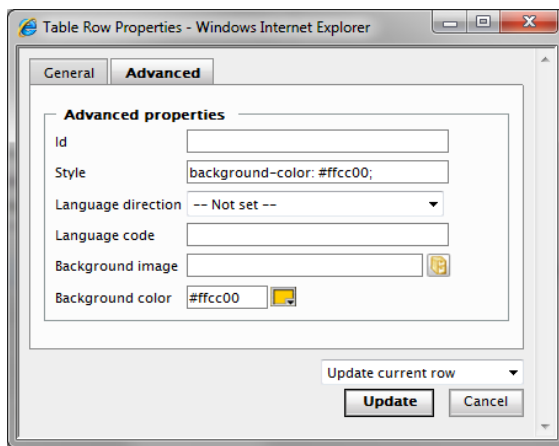


The **General** tab contains the following boxes:

- **Row in table part.** Set the number of columns and rows in the **Cols** and **Rows** fields.
- **Alignment.** Defines the position of the text in the cells of the table row.
- **Vertical alignment .** Defines the vertical position of the text in the cells of the table row.

- **Class.** Here you can apply preset CSS class settings for a specific table row. Note that you need to define these classes in the CSS files of your site first. Check with your system administrator to find out what applies to your website.
- **Height.** Define a specific height in pixels for a specific row of a table.
- **Update current row.** When you make changes to table rows, you can decide where to apply the changes:
  - Update current row (the selected row)
  - Update odd rows in table
  - Update even rows in table
  - Update all rows in table

#### Advanced Tab



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

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



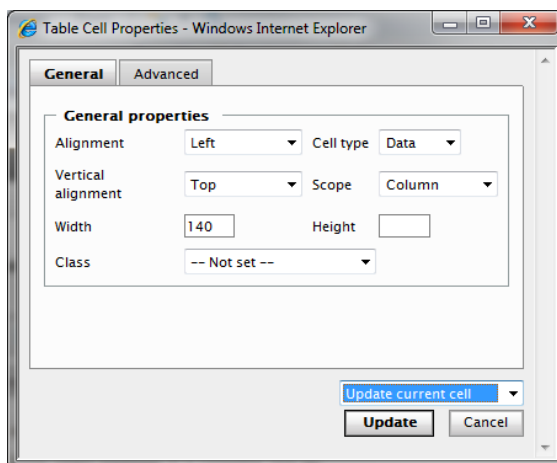
If you are using predefined CSS classes to format tables, rows or cells, be aware that additional formatting added "manually" on top of the predefined formatting, may be overridden and will not apply.

## Table Cell Properties



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

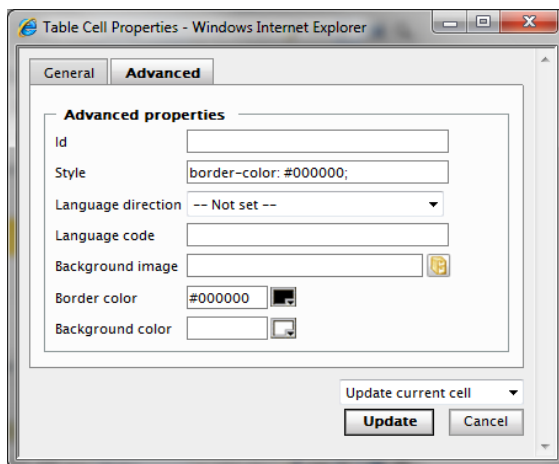
### General Tab



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

- **Alignment.** Defines the position of the text in the cell.
- **Vertical alignment** . Defines the vertical position of the text in the cells of the table row.
- **Cell type.** Define if the content in the cell is *data* or belongs to a *header*, select option "Data" or "Header". This is used for applying correct formatting to a table, but also for accessibility purposes when the table is interpreted by accessibility tools.
- **Scope.** Define whether the cell is a *row* cell or a *column* cell, for those cells that are columns headers or row headers. This is used for accessibility purposes when the table is interpreted by accessibility tools.
- **Width.** Define a fixed width in pixels for a specific cell in a table.
- **Height.** Define a fixed height in pixels for a specific cell in a table.
- **Class.** Here you can apply preset CSS class settings for a specific table cell. Note that you need to define these classes in the CSS files of your site first. Check with your system administrator to find out what applies to your website.
- **Update current cell.** When you make changes to table cells, you can decide where to apply the changes:
  - Update current cell (the selected cell)
  - Update all cells in a row
  - Update all cells in table

## Advanced Tab



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

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



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

## Modify the Number of Rows and Columns

The number of rows, column and cells in a table can be modified using the toolbar buttons. You can insert and delete rows and columns, and you can merge and split table cells.

## Insert and Delete Columns



With the buttons in the toolbar, you can insert columns before and after a selected column, and you can also delete a selected column.

## Insert and Delete Rows



With the buttons in the toolbar, you can insert rows before and after a selected row, and you can also delete a selected row.

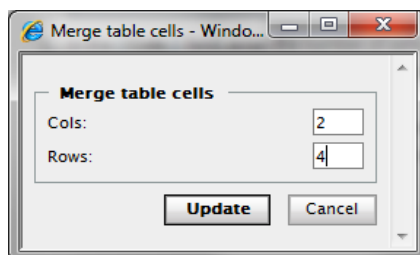
## Merging and Splitting Cells



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

### Merging Cells

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



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

### Splitting Cells

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

## Setting Accessibility Attributes for Tables

Below is an example of a table with accessibility attributes set for table and cells. First, a screen shot of how the table will appear to those who visually can see it on the screen. It is easy to see that J. Dinnen takes sugar in his coffee. Shown beneath is the HTML code generated when the Editor summarized the table. In the example below, the **Scope** option has been set to identify each column in the table. The table also has a summary text. The accessibility settings are

entered under the Table Cell Properties option in the Editor toolbar. This is a simple example, but the solution can also be used for more advanced tables with for example double headers.

Cups of coffee consumed by each senator			
Name	Cups	Type of Coffee	Sugar?
T. Sexton	10	Espresso	No
J. Dinnen	5	Decaf	Yes

```
<p>&nbsp;</p>
<table class="table-color" border="0" summary="This table charts the number of cups of coffee
consumed by each senator, the type of coffee (decaf or regular), and whether taken with sugar.">
<caption>Cups of coffee consumed by each senator</caption><thead>
<tr>
<th scope="col">Name</th><th scope="col">Cups</th><th scope="col">Type of Coffee</th><th
scope="col">Sugar?</th>
</tr>
<tr>
<td>T. Sexton</td>
<td>10</td>
<td>Espresso</td>
<td>No</td>
</tr>
<tr>
<td>J. Dinnen</td>
<td>5</td>
<td>Decaf</td>
<td>Yes</td>
</tr>
</thead>
<tbody>
</tbody>
</table>
```

A speech synthesizer might read the text in this table as follows:

Header: Cups of coffee consumed by each senator

Summary: This table charts the number of cups of coffee consumed by each senator, the type of coffee (decaf or regular), and whether taken with sugar.

Name: T. Sexton, Cups: 10, Type of coffee: Espresso, Sugar: No

Name: J. Dinnen, Cups: 5, Type of coffee: Decaf, Sugar: Yes

If the Editor had not set attributes for the cells, the speech synthesizer would not understand that each cell belonged to a particular header. It would read each row independently and would have started with the first row: Name, Cups, Type of Coffee, Sugar. Then it would have gone to the next row and read T. Sexton, 10, Espresso, No. It makes it almost impossible to understand a data table using accessibility tools if it has not been accessibility adapted and if these attributes have not been set.

## Adding Dynamic Content to a Page

Dynamic content can be added to a page using the **Dynamic content** button in the toolbar of the Editor. The dynamic content can be retrieved from different *fields* on a page. For instance the data can come from the "main body" field (the editor area on a page), or from the saved date or the writer fields.




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

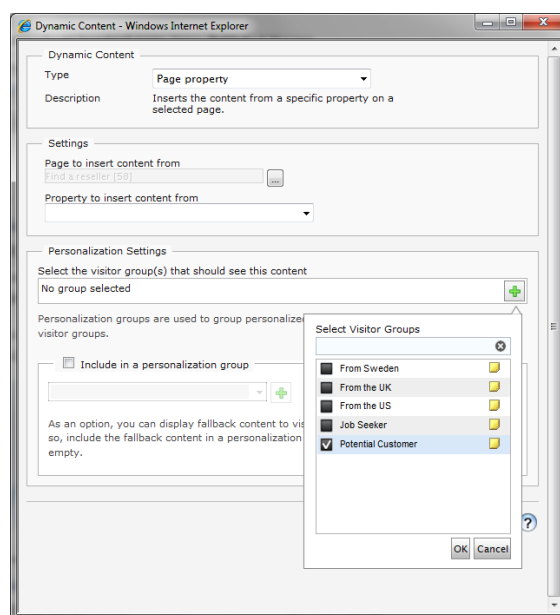
The dynamic content has often a common area in the structure. Check with your organization about how you are working with dynamic content.

In addition, you can turn your dynamic content to suit a specific visitor group as described in "Working with Visitor Groups and Personalized Content" on page 99.

## Adding Dynamic Content from a Page Property

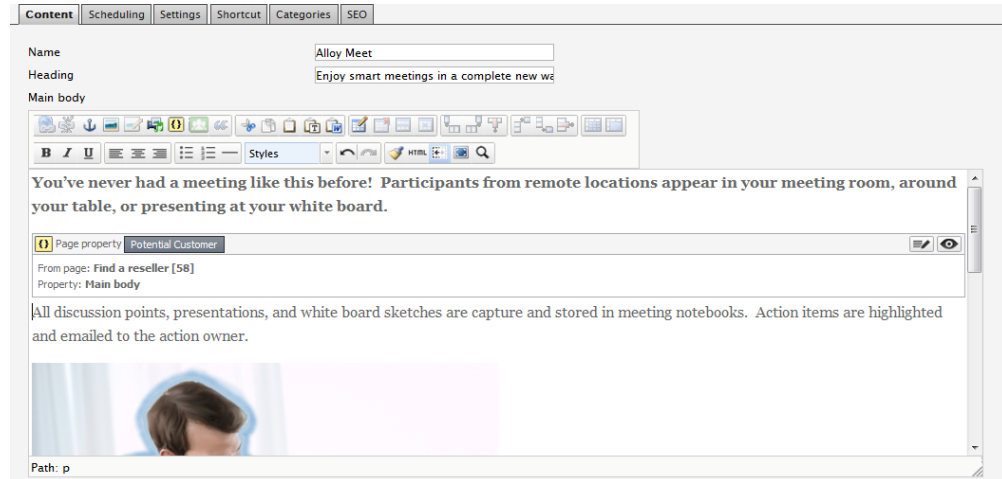
Add dynamic content from a Page Property as follows:


1. Open the page that you want to contain the dynamic content and click the **Dynamic content** toolbar button  in the Editor.
2. In the **Dynamic content** window, select the plug-in that you want to use as a base for your dynamic content. The **Page property** plug-in is included in a standard EPiServer CMS installation and is used in this example.
3. In **Page to insert content from**, select the page in the tree structure from which you want to display the data.
4. In **Property to insert content from**, select the property on the page that you want to display data from. In this example we will fetch data from the **Main body** property of a page.
5. In **Personalization settings**, you can click **+** to select the visitor group you want to have access to the dynamic content. Optional.



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

updated.




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


## Editing Dynamic Content on a Page

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

### Through the Dynamic Content Box

1. Click the **Edit dynamic content** button  in the dynamic content box.
2. Make your changes to the dynamic content and click **OK**.
3. Save the page to update the changes.

### Through the Insert Dynamic Content Button

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



Cut and copy for a dynamic content box in the Editor may work differently depending on the browser you use. You may have to use either the Cut/Copy toolbar buttons of the Editor, or the right-click Cut/Copy of your browser, instead of the keyboard keys (CTRL+X and CTRL+C).



If you have trouble placing the cursor immediately before or after a dynamic content box in the Editor, try using the keyboard arrow keys instead of the mouse.

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

## Deleting Dynamic Content from a Page

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

## Working with Quotes

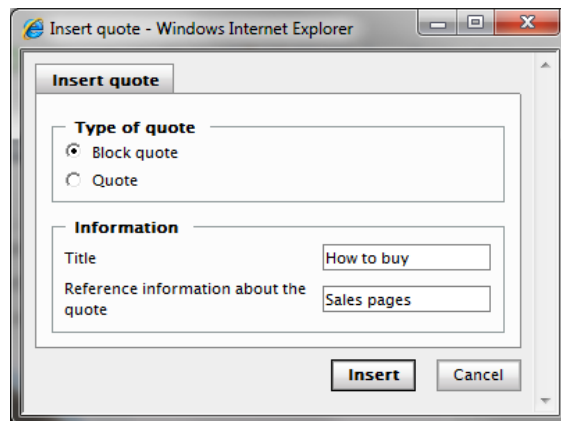


In EPiServer CMS, you can mark text as a quote, which is useful if you are working with accessibility on your website. With the **Insert quote** tool, you can format the text so that visitors using various aids to read the website can distinguish quotes from other text. You can format both short (part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

### Inserting a Quote

Insert a quote as follows:

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



4. Enter a title for the quote in the **Title** field.
5. Enter the source in the **Reference information about the quote** field. This is often the URL address for a website.
6. Select **Insert**.

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

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



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

## Deleting a Quote

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

Delete a quote as follows:

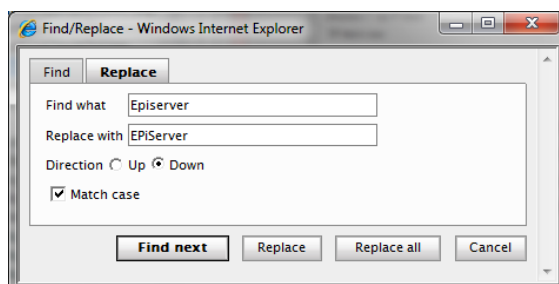
1. Open the text with the quote for editing.
2. Select the quote by placing the cursor on it.
3. Select **Quote** in the toolbar.
4. Select **Remove quote**.
5. Save the page to save the updatings.

## Finding and Replacing Text



Use the **Find** tool in the toolbar to search for and replace words in the Editor area of a page. Place the cursor in the Editor and click **Find**. Select the **Replace** tab in the **Find/Replace** dialog box if you also want to replace words as you search in the text.

1. In the **Find what** field, enter the word you are looking for.



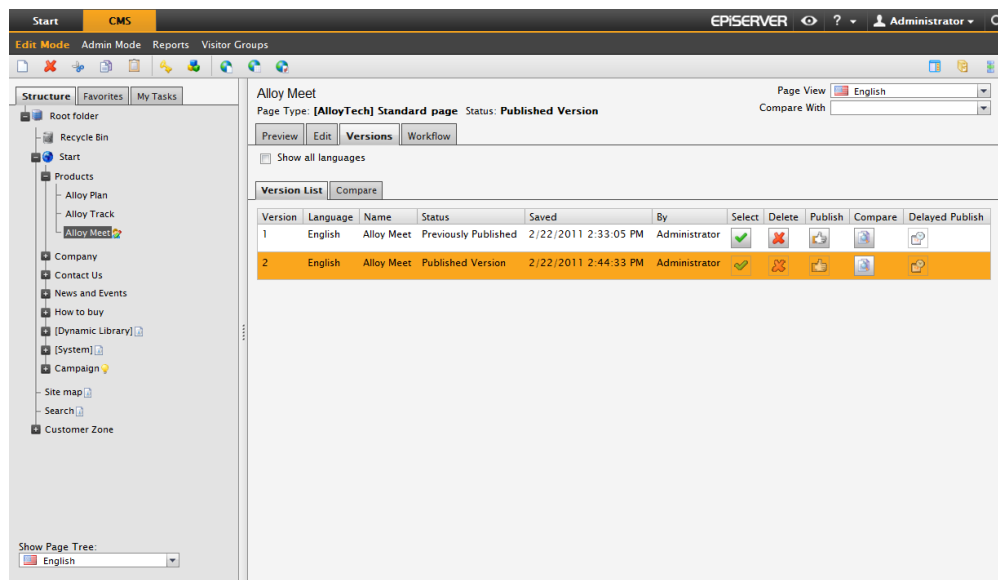
2. In the **Replace with** field, enter a replacement word if you want to do search and replace for a word.
3. In the **Direction** field, you can choose whether to search upwards or downwards in the text.
4. Select **Match case** if you want to search for the word using the exact cases for the letters.
5. Select **Find next**, **Replace** or **Replace all**.

# Version Management for Pages

EPiServer CMS allows you to work with multiple versions of the same page. A page that has previously been published and then changed, will be saved as a new version. You have the opportunity to access and re-publish older versions when needed. Page versions can be compared to each other with the differences marked.

Versions are managed in Edit mode from the **Versions** tab of a page. Select the **Version List** tab to display the version list. The most recently published version has **Published version** status, and this is the version that will be displayed when the page is selected in the tree structure. Pages that are saved but not published have the status **Not ready**. Pages that have been published have status **Previously published** status. Pages waiting to be published will have the status **Ready to publish**. A version that is set to be published at a certain time has the status **Delayed publish**.

If there exists page versions with status **Not ready**, the number of these will be indicated within brackets on the **Versions** tab. To edit a previously saved version, choose the **Select** button after the version and then choose the **Edit** tab.



The screenshot shows the EPiServer CMS 'Versions' tab for a page named 'Alloy Meet'. The page type is '[AlloyTech] Standard page' and its status is 'Published Version'. The 'Version List' tab is selected, showing a table of versions. The table has columns for Version, Language, Name, Status, Saved, and By. There are two versions listed: Version 1 (English, Alloy Meet, Previously Published, 2/22/2011 2:33:05 PM, Administrator) and Version 2 (English, Alloy Meet, Published Version, 2/22/2011 2:44:33 PM, Administrator). Version 2 is highlighted in orange. Action buttons (Select, Delete, Publish, Compare, Delayed Publish) are visible for each version.

Version	Language	Name	Status	Saved	By	Select	Delete	Publish	Compare	Delayed Publish
1	English	Alloy Meet	Previously Published	2/22/2011 2:33:05 PM	Administrator					
2	English	Alloy Meet	Published Version	2/22/2011 2:44:33 PM	Administrator					



If you republish a page that has been previously published, for traceability reasons a new version will be created in the version list, even if no changes are made to the content. The only difference will be that the page will have a different **Saved** date.

The number of versions stored for a page can be set in the systems settings of the administration interface of EPiServer CMS. Contact your system administrator to find out what is applicable to your website.

## Republishing a Page

When you republish a page that has been published before, for traceability reasons a new version of that page will be created even if no actual changes has been made to the page. The republished page will get a new time stamp under **Saved** in the version list.

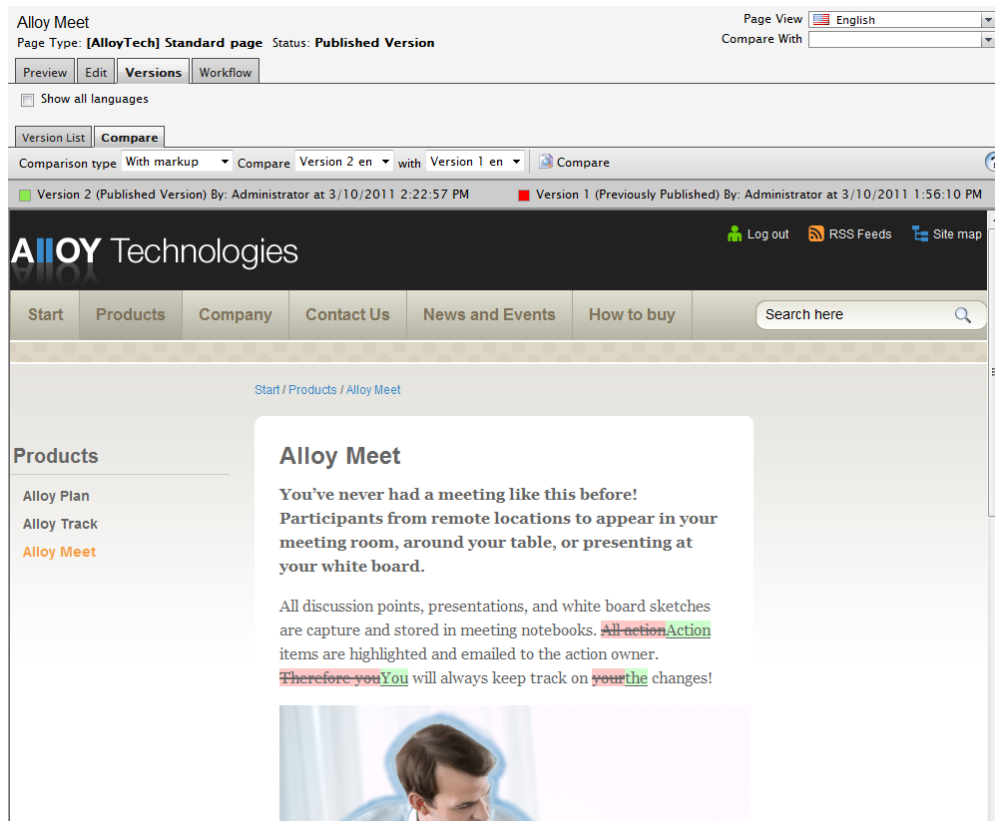
## Deleting Old Page Versions

You can delete a version of a page you do not want to keep by clicking the **Delete** button for that version. By deleting old versions, the version list will be easier to review. If you don't want users to be able to delete older page versions in the version list, the delete function can be disabled from the EPiServer administration interface.

## Comparing Page Versions

Version comparison is available on the **Versions** tab in Edit mode as follows:

1. Select the type of comparison in the **Type** field, and select the desired versions (by number) to be compared.
2. Click **Compare** to compare the versions. To change versions to compare, select new version numbers and click **Compare** again.



You can compare page versions to see the differences between them in the following modes:

- **With markup** shows the differences between two versions of a page graphically with different colors.
- **Side by side mode** displays the versions next to each other for visual comparison.
- **Changed fields** displays changes property by property (a property is a field in the page type).

## Enabling Delayed Publishing of a Page Version

In EPiServer CMS it is possible to schedule the publication of a version. This means that you can prepare the page in advance, and then schedule a later publishing. Enable delayed publishing of a page version as follows:

1. Create a new version of the page. Make your changes and select **Save and view**.
2. Submit the version for publication by selecting **Ready to publish**. This step is important in order to activate the delayed publishing function.
3. Select the **Versions** tab. In the version list, click the **Delayed publish** button after the version for which you want to set delayed publishing.
4. Select the **Enable delayed publishing** check box.

The screenshot shows the 'Events' page in EPiServer CMS. At the top, it indicates 'Page Type: [Public] Standard page' and 'Status: Ready to Publish'. There are tabs for 'Preview', 'Edit', 'Versions (1)', and 'Workflow'. The 'Versions' tab is selected. Below the tabs, there is a 'Show all languages' checkbox which is checked. Underneath, there are 'Version List' and 'Compare' buttons. The main section is titled 'Manage delayed publishing of this page version.' and contains a checked 'Enable delayed publishing' checkbox. Below this is a 'Publish date for delayed publishing' field with the value '2011-02-03 11:30' and a calendar icon. At the bottom, there are 'Save' and 'Cancel' buttons.

5. Select the date and time for the delayed publishing.
6. Select **Save**. Your version will be published on the date and at the time you specified, replacing the currently published version which will be removed from publication.

To remove the delayed publishing settings, select the **Delayed publish** button and clear the **Enable delayed publishing** check box and click **Save**.

# File Management in EPiServer CMS

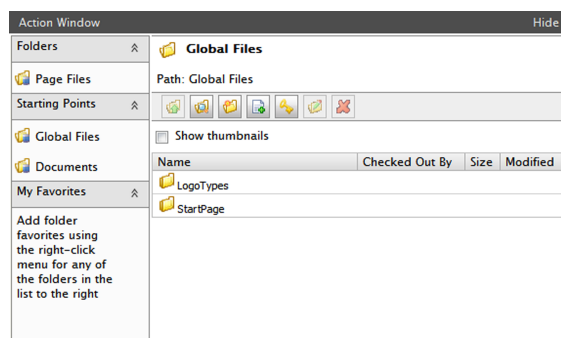
EPiServer CMS has its own file management where you can create folders, copy, move and rename both folders and files. You can upload files and set search criteria for the files. Use the built-in search function to search for files. There is also an option to set access rights for different folders, so that each editor can see the folders for which he or she is authorized.

All the information that you want to show on your website must be saved on the web server or a data source to which visitors have access rights. You must therefore upload pictures and documents that you want to show on your pages to the data sources that are linked to your website. When you upload files you have stored in a different location, the files are copied to the web server. You can upload files directly in the File Manager or from the dialog box **Insert/edit image**.

You can access the File Manager by selecting **File Management** in the toolbar to the right, or by selecting **File Management** in the **Action Window**.

## Window

The File Manager is always opened in the Action Window to the right in the browser. This makes it possible to keep the File Manager open to the right, ready for dragging and dropping items into a page you are working with.



File Manager contains the following:

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



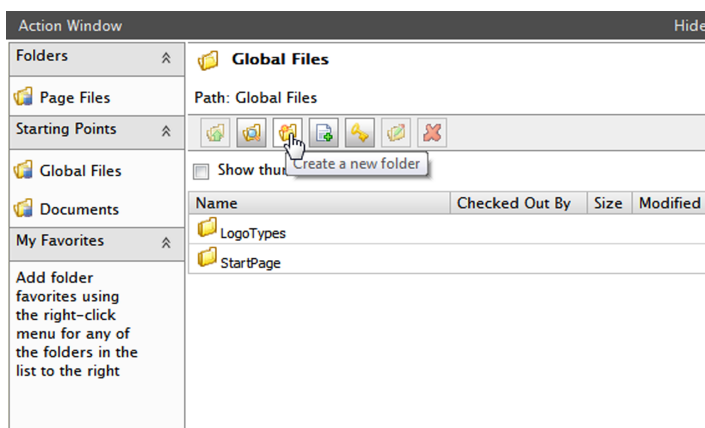
## Right Mouse Button in the File Manager

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

## Working with Folders

### Create Folder

Create a folder by selecting **Create a new folder** in the toolbar or on the right-click menu. Fill in the name of the folder and select **Save**. This folder is created as a sub-folder of the folder in which you selected **Create a new folder**.



### Open Folder

Open a folder by double clicking on the folder's name.

### Delete Folder

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

### Rename Folder

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

### Add Folder to My Favorites

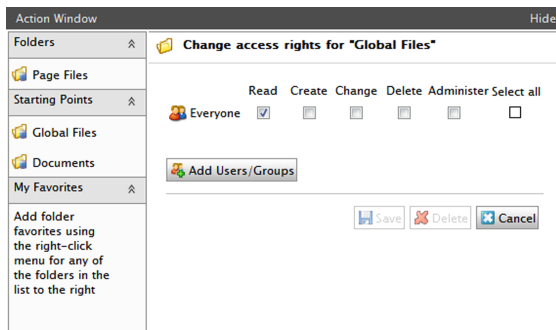
Add a folder to My Favorites by right-clicking on the folder's name and selecting **Add Favorite**. The folder is added to the **My Favorites** section in the left part of the File Manager. Click **My Favorites** to expand the section and display favorites.

## Remove Folder from My Favorites

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

## Change Access Rights to Folder

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



## Move Folder

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



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

## Copy Folder

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

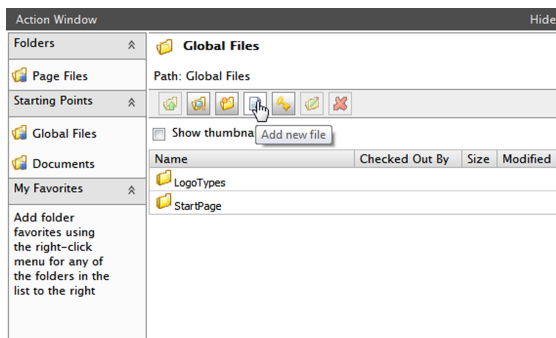
# Working with Files

## Adding File

Upload individual files to the web server as follows:

1. Select folder.
2. Select **Add new file** in the toolbar, or right-click and select **Add file**.

3. Click **Browse** and select the file you want to upload to the web server. Enter information about the file in the fields.
4. Click **Save**. The file is uploaded to the web server and placed in the selected folder.



## Adding Multiple Files

Add multiple files at the same time in the File Manager as follows:

1. Select folder.
2. Right-click and select **Add Multiple Files**.
3. Select **Browse** and point to the files you want to upload to the web server. Hold down shift or CTRL to select multiple files.
4. Select **Open**. The files are uploaded to the web server and placed in the selected folder.

## Adding Files Using Drag and Drop

Upload one or several files at the same time, to the File Manager using drag-and-drop from Windows Explorer as follows:

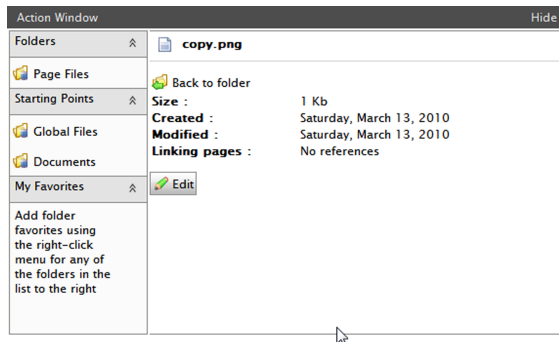
1. Open Windows Explorer.
2. Select the files you want to upload. Hold down shift or CTRL to select multiple files.
3. Drag and drop the files into a folder in the EPiServer CMS File Manager. The files are uploaded to the web server and placed in the selected folder.



In order to upload files from Windows Explorer using drag and drop, you need to have access rights for advanced file upload. This is set in the EPiServer CMS administration interface. Check with your system administrator what applies for your website.

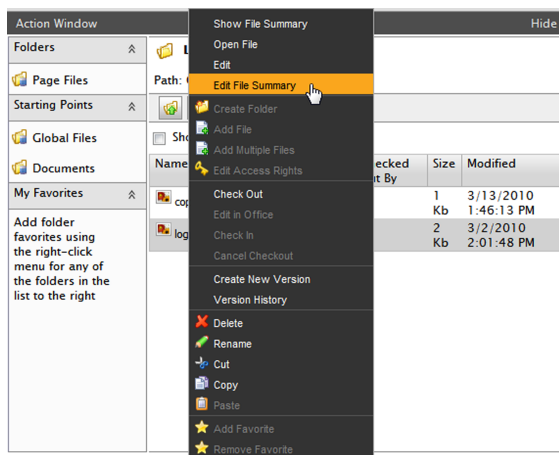
## Showing File Summary

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



## Editing File Summary

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



## Open a File

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

## Renaming a File

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

## Replacing a File

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

## Deleting File

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

### Moving a File

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



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

### Copying File

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

## File Management with Windows Explorer

As a complement to working in EPiServer CMS File Manager, you can also manage your documents and images from Microsoft Windows Explorer. This is made possible using the so called WebDAV technique. You can create, copy, move and delete files in EPiServer CMS file system by working directly in Windows Explorer. You can also save new documents in EPiServer CMS file system from an application such as Word.

Before you begin managing your files from Windows Explorer, your website must be connected to Windows Explorer as a network unit. The connection can be set up in different ways. If this does not take place automatically when you log in, you must do it manually in Windows Explorer. Check with your system administrator to find out what applies to your website. More information can also be found in the technical documentation on [world.episerver.com](http://world.episerver.com).

When your website is connected, you will see it as a network unit in the file structure in Windows Explorer. You can now create files in the Office programs and save them in the file structure on your website without needing to open EPiServer CMS first and uploading them in the File Manager there.

## File Version Management

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



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

### Checking Files In and Out

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

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

### Integration with Microsoft Office

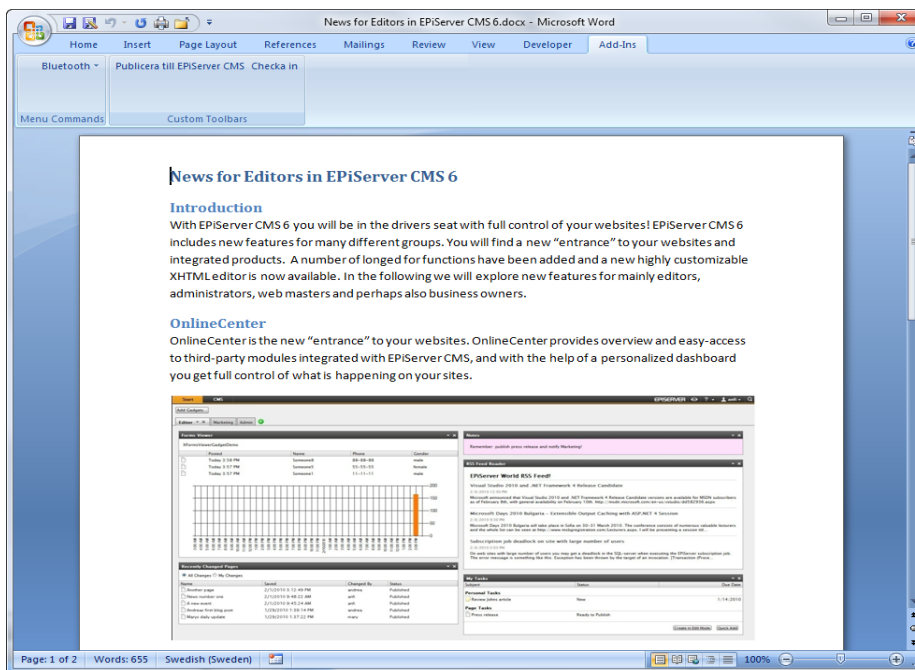
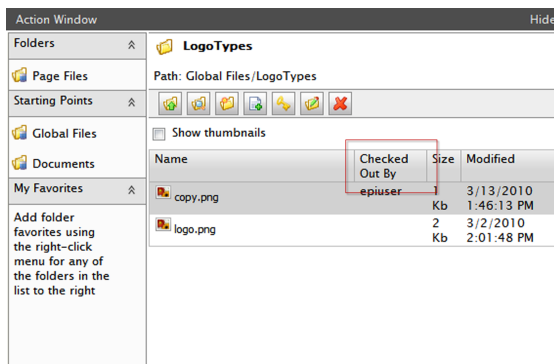
Version management is connected to the Office programs, Word, Excel and PowerPoint, and allows you to open files in these programs directly from the File Manager. When you have made your changes you can check in the files and make comments on your changes directly from the Office programs.



In order for the version management integration to work with the Microsoft Office applications, you need to install a component on the computer you are using. This component is available for installation in the Edit mode under My Settings.

### Working with Version Management through the Office Programs

1. Right-click the file you want to edit. Select **Check Out**. Your user name is displayed in the **Checked Out By** column indicating that the file is locked by you.
2. Right-click on the file again. Select **Edit in Office**. If you have selected a Word file to edit, Microsoft Word opens automatically.
3. Make your changes in the document. Select **Check In**. A dialog box is displayed, in which you can enter a comment about your changes.
4. Enter your comment and select **OK**. A new version has been created and is available for editors and visitors to the website.



## Canceling Check Out

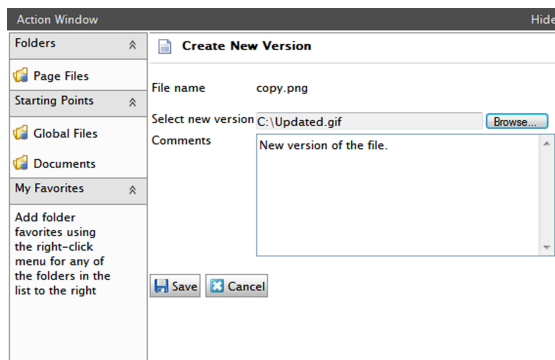
If you do not make any changes to the document that you have checked out, restore it by right-clicking on the file you checked out and select **Cancel Checkout**.

## Working with Version Management of Other Files

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

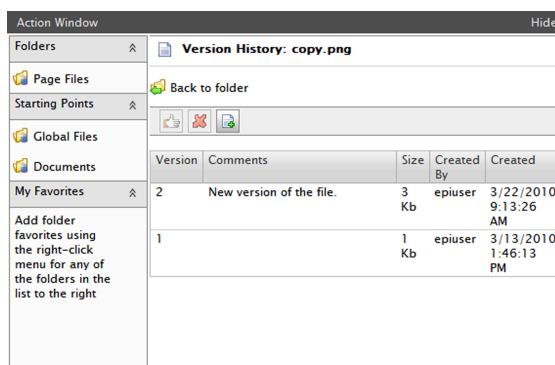
1. Open the file by double-clicking it. The relevant program is opened and you can make changes to the file. Save the file locally on your computer by selecting **Save As...**
2. Right-click the selected file and select **Create New Version**.
3. Select a new version by selecting **Browse**. Select the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

4. Enter your comment and select **OK**. A new version of the file has been created and is available for editors and visitors to the website.



## Version History

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

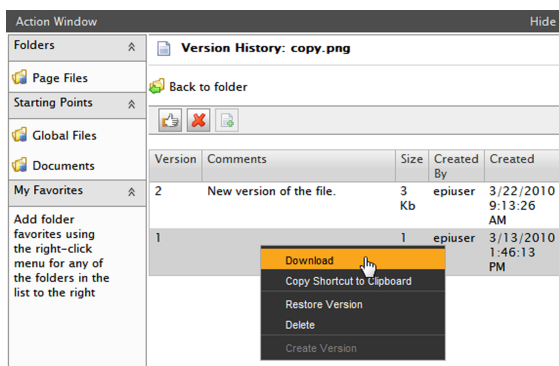


## Downloading an Earlier Version

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

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





## Republishing an Earlier Version

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

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



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

## Deleting Versions

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



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

## Tabs in Edit Mode

All page types contain a number of tabs in which different settings can be made and information can be entered. What is contained under each tab is entirely dependent on what functions you want that particular page type to have. The number of tabs may also vary depending on the page type. It is also possible to change the tabs that are available and the information they contain.



Note that setting up the tabs and fields is a job for your system administrator, which means that all fields described here might not be available in the page type you are using. Alternatively there might be tabs and fields that are not described here.

The **Standard page** type is included in a standard installation of EPiServer CMS, and often forms the basis for other page types. This template has the following tabs:

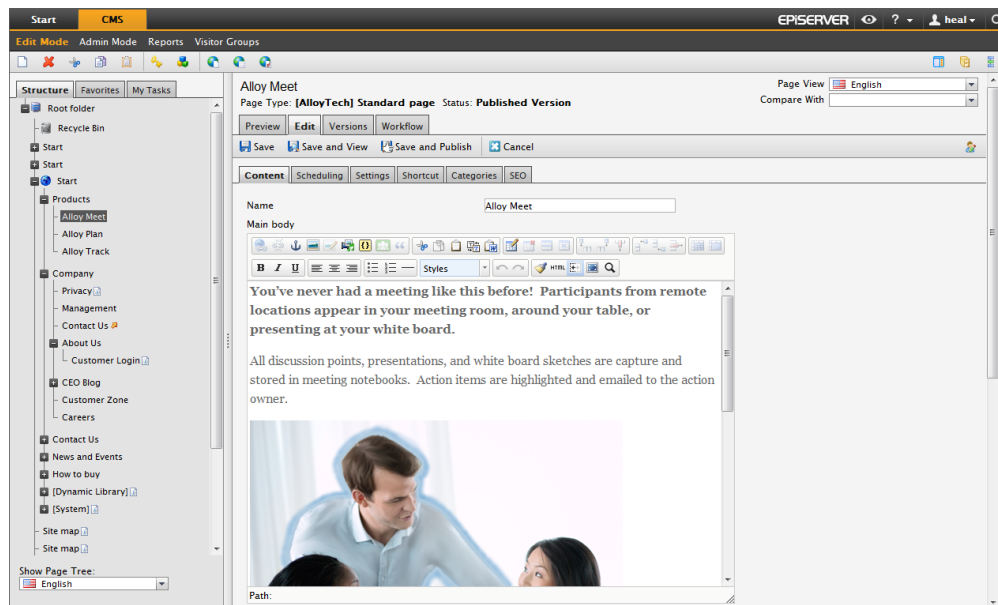
- **Content** is where you enter the page name and the content of the page.
- **Scheduling** is where you work with publishing dates and archiving for the page.
- **Settings** is where you set display page in menu, page addresses, sort index, listings, subscription.
- **Shortcut** is where you set shortcut and fetch data from links, for the page.
- **Categories** is where you categorize the page.
- **SEO** is where you can enter meta tag information about the page used by the search engines. Optional.

## Standard Fields

All page types have the following **standard fields** that cannot be removed:

- Name
- Start/Stop publish
- Mark page as changed
- Display page in menus
- Created
- Sort order
- Sort index
- Archive to page
- Simple address for page
- Page name in web address

## Content Tab



## Default Values

The system administrator for your website is able to add standard values for the different fields that you can fill in. This may mean for example that the heading field is already filled in, or perhaps that the date for publishing is shown automatically. If your system administrator has chosen to work with default values, the purpose is often to make things easier for the editors without restricting them. This means that, as an editor, you can also change the preset values if you choose.

### Name

Type the name of the page you create here. This is the name that the page will have in EPiServer CMS's tree structure, in the menu and as a heading, unless you enter another name in the **Heading** field ("Heading" below). The **Name** field must not be left blank.

### Heading

Optional. **Heading** will also appear later as a heading at the top of the page. If you wish, the heading can be different from the page **Name**, which is what is shown in the tree structure. Enter a page heading in the field **Heading** if you want a different value from the one you entered under **Name**. The **Heading** field can be left blank and will then have the same value as the **Name** field.

### Editor

In the Editor you create what is to be displayed to the visitor. In simplified terms, you could say that this is where you create the content of your pages. The Editor is an editable area in which you can work with texts and images, create links and add tables.

The example template **Standard page** has the editor sections **Main Body** and **Secondary Body**. The **Standard page** template is constructed so that the text in **Main Body** will be displayed in the middle of the page and the text in **Secondary Body** will be shown in the column to the right.



Note that not all page types have Editor fields.

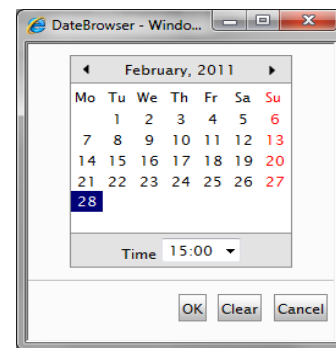
## Writer

Optional. This is where you enter the name of the individual who created the page, and it can be left blank. When the page is published, the date and time the page was last marked as modified is also shown.

## Scheduling Tab

### Start/Stop Publish

You can schedule the publishing of the pages you have created. You do this by specifying the dates and times between which the page should be displayed, e.g. 2001-04-01 08:00 up to and including 2001-04-30 16:00. Selecting the button next to the input field brings up a calendar in which you can select relevant date and time. If you leave the fields empty, the page will be published immediately and remain visible on the website for an indefinite period of time.



In such instances, you must manually delete the page if it is to be taken off the website. You can also use just one of the fields if you want to set either a start date or an end date. Don't forget to click the **Publish** button after you have saved the page, otherwise, the page will not be published. Even though you click **Publish** immediately after saving the page, it will not become public until the selected date and time are reached.

### Created

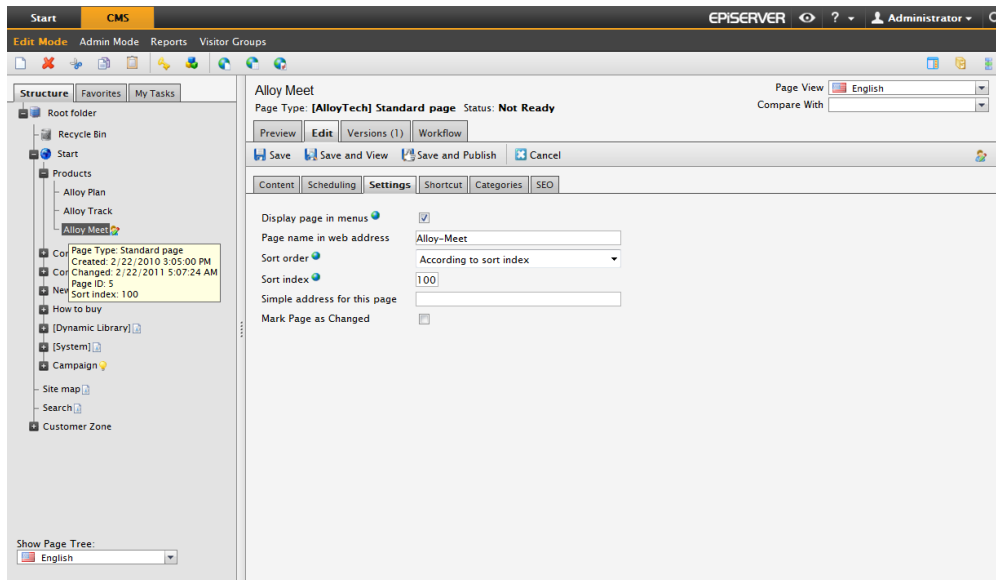
Date and time when the page was created, does not normally need to be changed.

### Archive to Page

If you are using publication dates, start and end publication, this allows you to specify where the page is to be placed when the end publication date arrives. You perhaps only want news to be shown for two weeks on the home page, and then be archived under the News archive page.

You then create a new page and call it news archive. Once the news archive page has been created, select the page in the **Insert/edit link** dialog box and select **OK**. This property is inherited by all underlying pages. This means that you do not have to set it on all the pages to be archived, just on the main page.

## Settings Tab



### Display Page in Menu

You do not always want all the pages on a website to be included as options in the menu. If you clear the **Display page in menus** check box, the page will not be visible in the menu. This function may be suitable for forms or other pages that do not need to be present in menus but are instead accessed through links from other pages.

### Page Name in Web Address

The **Page's name in web address** field only needs to be used if you have chosen to use web addresses that reflect the website's structure. Then the addresses in the address field will follow the structure of the website. Contact your systems administrator to find out what is applicable for your website. If you do provide an address in **Page's name in web address**, EPiServer CMS will automatically create an address based on the name you have given the page. If you think it is too long and complicated, you can create a name for the page yourself.

It is possible to change the name afterwards, but bear in mind that a lot of people may have created a link to your page, and they won't work any more if you change the name in the **Page name in web address** field. If you change the name of the page, the field and links to the page are not affected.

### Simple Address for this Page

When pages are linked in EPiServer CMS, they are assigned an address that can prove difficult to remember and which you may want to avoid using in a marketing context. **Simple address for this page** allows you to create a link so that visitors can access the page using an understandable address. If, for example, you enter /products in the field, visitors can enter <http://www-.company.com/products> in the address bar of their browser and jump straight to this page.

This function also works if you enter the name of the page after the website address. For example, if I have a page called News, I can enter `http://www.company.com/news` and come to the right page without having to enter a simple address. EPiServer CMS first searches pages that have a simple address. If it does not find a page with that address it will search on the name of the page. If several pages have the same name, the page found first will be displayed.

### Sort Order

The sort order specifies how the pages are to be sorted in menus. When you select the sorting order, you control the order of all sub-pages below the page you are editing. Here, you can either select to sort by the date on which a page was created, changed or published in ascending or descending order. You can also select to sort alphabetically or according to the sorting index you have applied.

### Sort Index

If you have chosen **According to sort index** as the sort order on a page, you must assign all its sub-pages a number, index, so that the system understands the order in which the pages should lie. The page with the lowest number is sorted so that it comes at the top of the menu. The standard number for all pages is usually 100. If you create a page that you want placed before other pages in the menu, assign this page a number lower than 100, perhaps 90. If you want it to be sorted after other pages, give it a number higher than 100, such as 110. It is always a good idea to work in at least 10s in case you should want to enter a page between two others in the future. In this way you can easily add in a page without needing to change the sort index of all the pages. Remember, the sort index is only used when you have chosen **According to sorting index** under **Sort order** on the parent page.

### Mark Page as Changed

In EPiServer CMS, the date when pages are saved is used on a number of different occasions. One example of this is subscription, when the page is sent as part of a news item in a subscription package. If you have made minor changes to the layout or corrected spelling mistakes, you do not want EPiServer CMS to think the page has changed and include it in a subscription dispatch. In this instance, to let EPiServer CMS know that you have made extensive changes to the content of the page, you must select the **Mark page as changed** check box. The system will then include it in the next subscription dispatch.

### Fetch Main Listing From

Optional. In many cases, it is useful to be able to create a list of other pages, for example for listing news items or links. In such instances, a list is created containing all pages beneath a page in the structure. The list displays the name of the page, the puff text and a link to the page where you can read more. Selecting the button next to the box creates a listing. The **Select page** dialog is opened. Highlight the page from the underlying pages of which you want to fetch the listing from and select **OK**.

### Display Number of Pages in the Main List

Optional. Once you have created a listing, it may not always be the case that you will want to display all the records in the list, for example when you are listing news items. In such instances, it may be appropriate to display only the five most recent news items. To do this, enter five in the **Display number of pages in listing** field. If no value is entered in this field, all pages will be displayed in the listing.

### Fetch Secondary Listing From

Optional. Here you have the option of adding a further listing of pages, which will be shown in the page's right hand margin, just as this template is constructed.

### Number of Pages in the Secondary List

Optional. Here you can specify the number of pages to be displayed in the secondary listing. If you do not specify a value in the field, all the pages in the listing will be shown, if you have specified a page from which to retrieve a secondary listing.

### Activate Subscription

Optional. By selecting the **Activate subscription** check box, you give the visitor the opportunity to subscribe and to receive notification when any of the pages under the main page are updated or when new pages are added to the site. If for example you have a page for news with underlying news pages, subscribers will receive an e-mail message containing links to the newly created news pages. The user must have registered for a subscription on a special page to receive this information.

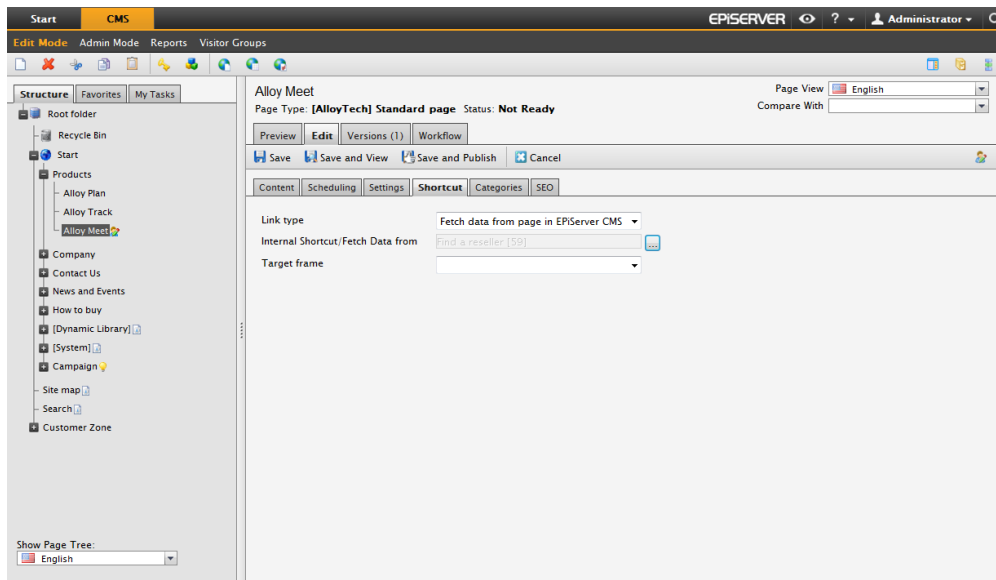
### Block Subscription for this Page

Optional. All pages that are created and published under a page marked **Activate subscription**, go out in the subscription letter. There are however occasions when you want to create a new page that you want to publish without it being sent out in a subscription letter. By choosing the **Block subscription for this page** option, you prevent the current page from being sent out in the next subscription letter.

If you want the page to be sent out in the subscription dispatch at a later date, clear the **Block subscription for this page** option, select the **Mark page as changed** option and click **Save and publish**.

## Shortcut Tab

The **Shortcut** tab is used for creating different types of links in the menu tree. The difference between shortcuts and ordinary links, is that with the shortcut alternative the page itself becomes a link in the menu structure, and will not display any content of its own. Shortcuts can link to pages on the same website or external sites. Shortcuts can also be set to fetch data from other pages on the same site. With this alternative the visitor will still remain in the same branch of the page tree.



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

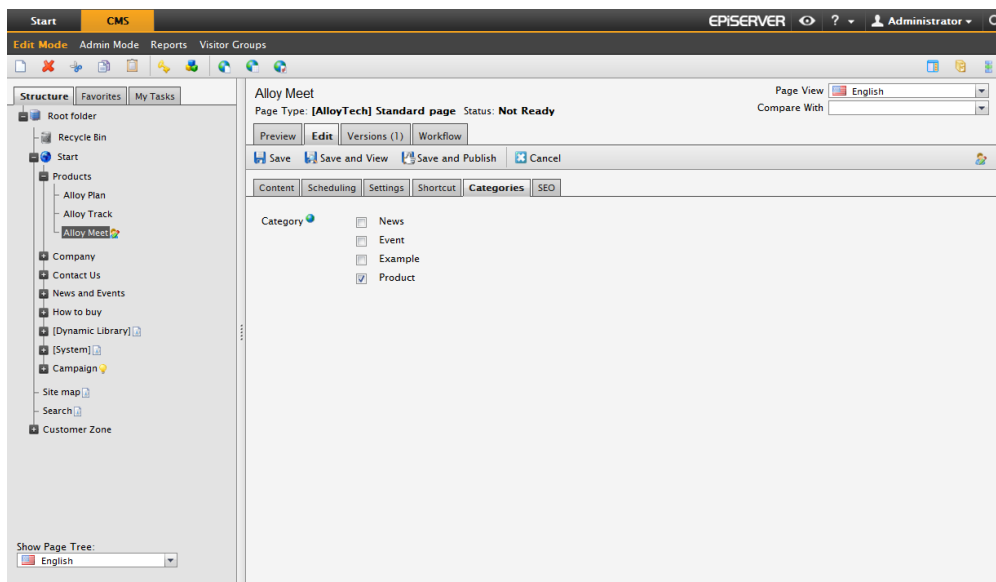
- **Link to this page** is the default value i.e. a link that displays the information you created on the **Content** tab. By selecting this, you also reset the page after using other types of links.
- **Shortcut to page in EPiServer CMS** is used for linking to another page on the same website. This then becomes a direct link to the page you select. A visitor who clicks this link will be transferred to the page you have linked to and its associated menus.
- **Fetch data from page in EPiServer CMS** is the same type of link as **Shortcut to page**. The difference is that instead of being moved to the page you link to, you retrieve information to the page you are on. The visitor remains on the same page, which also retains the same structure. This function is practical when building cross-structures in a website. You can re-use the same information in several different contexts for example on an intranet, but you only need to maintain it in one place.
- **Link to page on another website** is used to link to an external page on the Internet or to a document on the server. Remember to include the whole address, including `http://`. By clicking the button beside the field, you open the link tool in which you can create links as normal. You can link to documents, e-mail addresses, etc.
- **No link, only text** is used if you want this page only to constitute a heading in the menu and not display any information or link to another page.

In **Target frame**, you specify how the link is to be opened. This is primarily useful if you have a website that uses frames. It is also common practice to open external links in a new window.

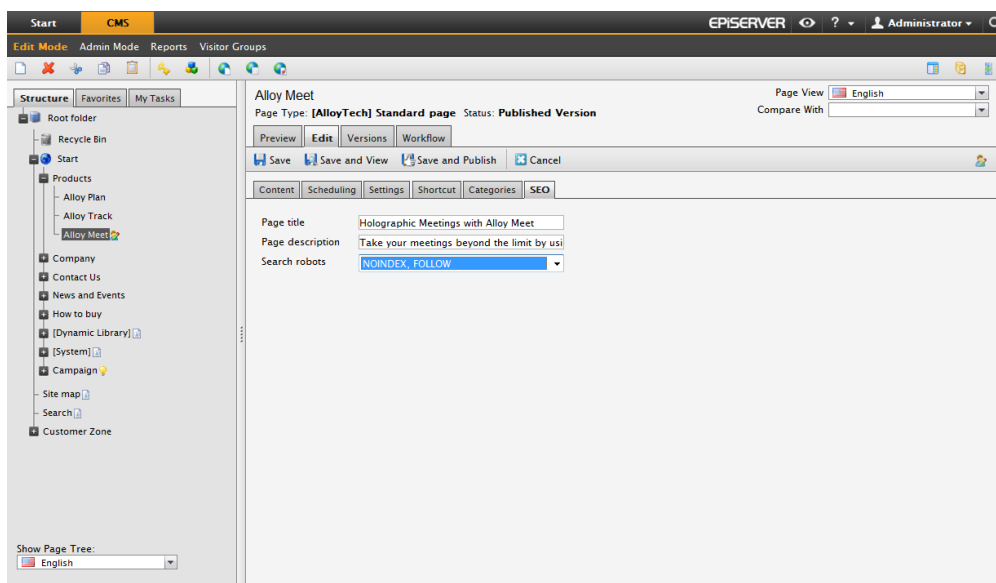
## Categories Tab

Categorization of pages can be extremely useful, for instance when filtering search information or pages in a news listings. A system administrator can manage categories in the EPiServer CMS administration interface. These categories will then appear under the **Categories** tab where editors can apply them to pages.





## SEO Tab



On the SEO tab (optional), you can provide the following meta tag information used by the search engines:

### Page title

Type the title of the page to be indexed and shown as a link on the **SERP**<sup>1</sup> by the search engines. If you do not type anything here, the system generates a name based on the page name and website name, for example, Products - Alloy Technologies.

---

<sup>1</sup>Search Engine Result Page. The search engines crawl the internet and show the results on a page. The Title tag of the web page, H1 heading and the lead will be displayed as the text search engine result page.

### Page description

Type the introducing text to be indexed and shown under the link on the SERP by the search engines.

### Search robots

Select one of the following settings for the page used by the search engines:

- **INDEX, NOFOLLOW** means that the search engine will index the page, but *not* follow the links on the page.
- **NOINDEX, FOLLOW** means that the search engine will *not* index the page, but follow the links on the page.
- **NOINDEX, NOFOLLOW** means that the search engine will neither index the page or follow the links on the page. For example, use this setting for a “thank you” page according to a form.

These available settings can be changed by the system administrator, which means that you might see other texts than above.

# Working with Globalization

EPiServer CMS supports being able to work with several page languages/variations simultaneously. This means that a tree structure can consist of several parallel trees, one for each language. This function is not only useful on websites that have several languages. Globalization can also be used if you, for example, want an easily read part of a website. It is another variation of a page even if it is written in the same language.

There are many ways to work with language variations. The hope is that you will be able to find the one that suits you best. Your systems administrator has, together with your supplier, set up how the globalization support will work on your particular website, and the variations can be considerable. A number of websites will have their entire contents translated into several languages while others may only have a small part translated. The pages that are therefore not translated should perhaps be shown in another language, or not shown at all. EPiServer CMS supports the variation of these settings for each individual page.

## Default Language for the Website

In EPiServer CMS you can work with all languages of the world. Many European and Asian languages are installed as standard, but it is possible to add more. Every website has a so-called default language. Your system administrator decides which language will be the default language. The default language is the language that is shown primarily to website editors and visitors, but it is also possible to view a language other than the default language.



Globalization applies to all pages, regardless of which page type the page is based on.

Your systems administrator decides which fields in each page type will be unique for each language. Certain fields in each page type are therefore the same for all languages and the value of these fields must be changed in the website's default language. The common fields are marked with an icon after the field's name.

## Structure

When you log into Edit mode, the tree structure is shown to the left. The language that is chosen as the default language for the website is shown first. A drop-down list at the bottom of the **Structure** tab displays the languages that you have access to create and edit pages in. Pages shown in italics are not available in the language you have chosen.



A flag icon shows that the page is missing for the current language and will be displayed to website visitors in the language that the flag shows as a fallback language.

## Creating and Editing Globalized Pages

In order to create a page in a different language, you must first have created and saved the page in the original language. There are three ways of creating pages in a different language. Choose the way that suits you best.



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

## Menu Above the Page

1. Select the page that you want be available in the other language.
2. Select the "new" language from the **Page view** list box at the top-right of the page.
3. Select **Edit** and enter the information you would like to appear in the various fields on the page.
4. Select **Save and publish** the new language variation of the page.

## Page Languages



In the toolbar there is the **Page Languages** button. This opens an **Action Window** in which you will see an overview of the status the different language versions have for the highlighted page. You can easily create language variations from this view.

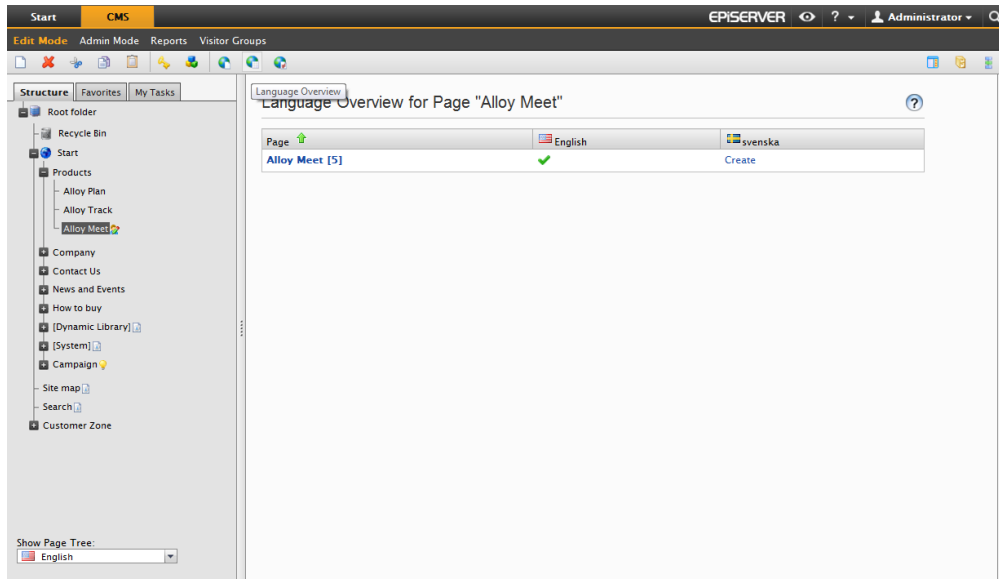
1. Select the page in the left structure.
2. Select **Page Languages** from the toolbar.
3. The **Action Window** is shown to the right and all available languages are listed in it.
4. Select **Create** with the language you want to create your page in.
5. A new language version of the page is shown, provide the information you want in that language.
6. Select **Save and publish**.

## Language Overview



In the toolbar there is the **Language Overview** button. This shows a language overview of the current page and its sub-pages. From this view you can see the status that applies for the various language variations and you can create new language variations. A green tick shows that the page has been created and published.

1. Select the page in the left structure.
2. Select **Language Overview** from the toolbar. The language overview for the page is shown.
3. Select **Create** for the language you want to create your page in. If a page has been created in a particular language, but not yet published, click **Publish**.
4. Enter your content and publish it if required.



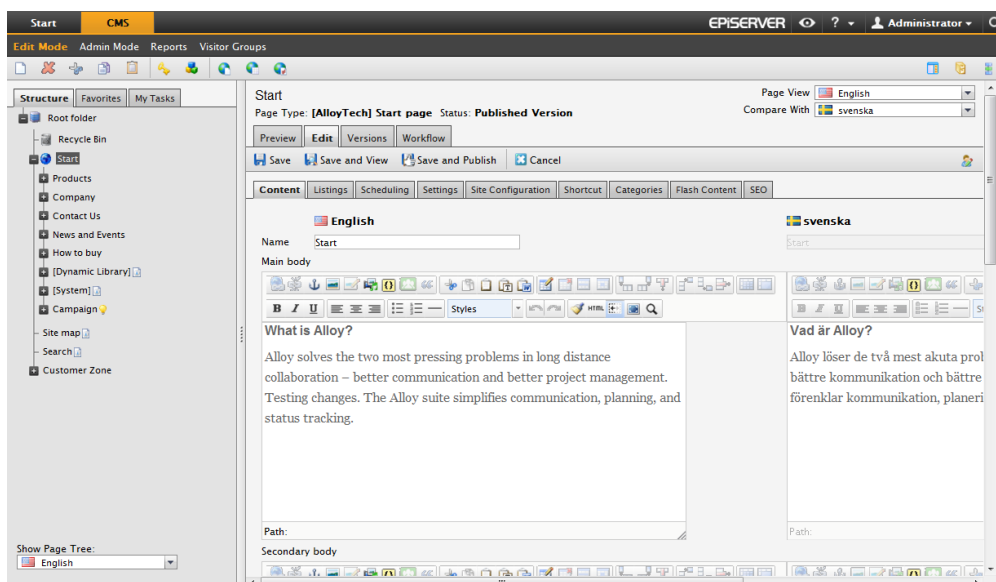
## Delete Language

It can sometimes be necessary to delete a language variation without deleting the entire page and the other languages. It could be that you have accidentally created a page in the wrong language or you may just want to delete the information in that language.

1. Show the tree structure for the page the language version of which you want to delete.
2. Right-click on the page that you want to delete the language variation for.
3. Select **Delete language**.
4. Confirm that you want to delete the language.

## Compare Languages

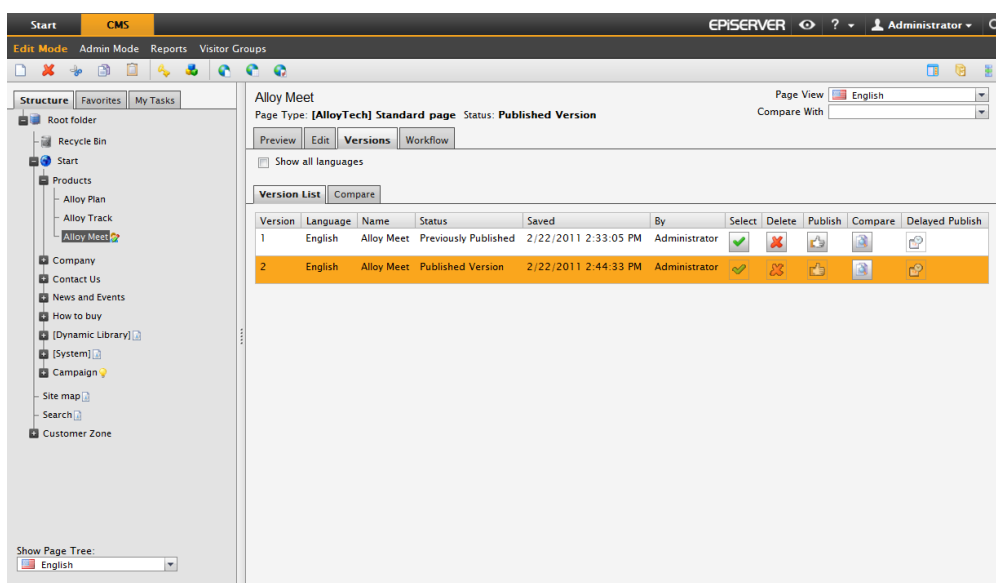
It is possible to compare two language variations to see if there are any differences. You can compare the different language variations in the **Edit** tab. You may want to compare languages if you are for example, translating a page and would like to see what the page looked like in the original language.



1. Select the page for which you want to compare languages.
2. Select the first language in the **Page view** drop-down list in the top-right of the window.
3. Select the second language in the **Compare with** drop-down list.
4. Both the language versions are shown beside each other and you can compare and edit the first language. The second language cannot be changed while comparing languages.

## Language Variation Version Management

All language variations have their own page versions visible on the **Version List** tab. To view all versions and all language variations, select the **Show all languages** check box. "Version Management for Pages" on page 69.



## Linking to Language Variations of a Page

It is possible to link to a particular language variation of a page.

1. In the Editor, select the words that will form the link.
2. Select **Insert/edit link**.
3. The **Link Properties** dialog box appears with the **Web Page** tab active.
4. In the **Link title** field you enter the text that will be shown as a pointer to the link. This is important information for everyone reading the website with different accessibility aids.
5. In the **Target frame** field, select how the link is opened. If nothing is selected here, the link will open in the same window.
6. Select **Page on this website** as the link target. Select the page to which you want to link by selecting the button to the right of the **Address** field. This displays a new dialog box showing the page tree structure.
7. Select the page you want to link to in the structure, click **Select**.
8. Under **Language** you can select which language version of the page will be shown. Select the language from the list, or select the **Automatic** option. If you choose the latter option, which is most common, the visitor is automatically directed to the language version you have decided to visit on the website.
9. Select **OK**.

## Language Settings



The languages available on the website can vary in different places in the tree structure. It is possible to make a small part of the website available in several languages, instead of on the entire structure. It is also possible to have replacement languages and fallback languages, so that you can define what happens if a page is not available in the language that the website visitor is currently visiting. Which language will be shown instead or will the page not be available at all. The **Language Settings** option in the toolbar allows you to select how the website displays a certain language and when.

Language settings are divided into two groups:

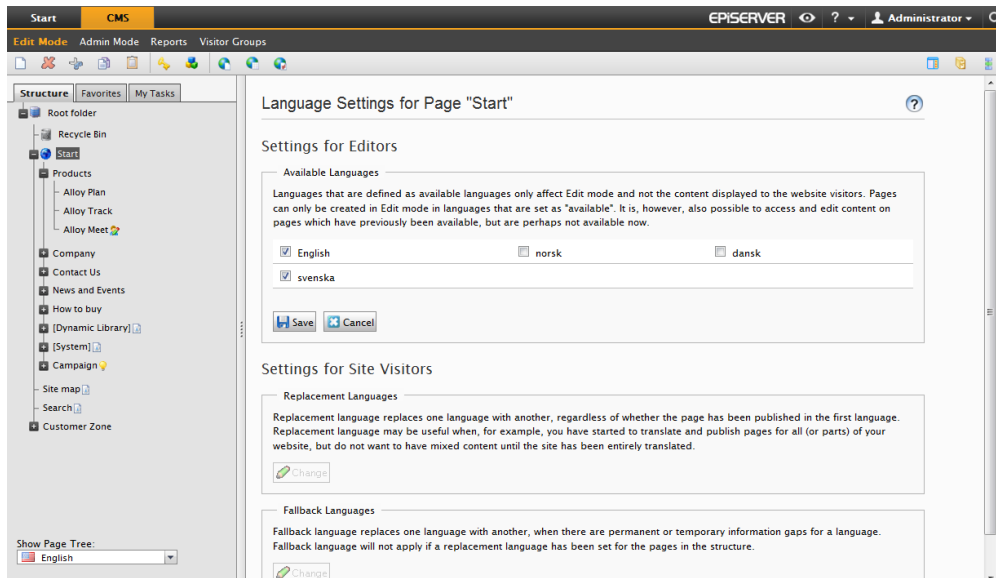
- settings that do not affect the language that is presented to the visitor - available language.
- settings that affect the language that is presented to the visitor - replacement language and fallback language.

## Available Languages

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



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



1. Select the page in the structure from where you want make one or more languages available in Edit mode. For example, if you want the entire website to be available, select the Start page.
2. Right-click and select **Language Settings** or select **Language Settings** from the toolbar.
3. Clear the **Inherit settings from the parent page "xxxxxx"** if you want to create special settings for this part of the site.
4. Select **Change** under **Available languages**.
5. Select the languages that you want to be available.
6. Select **Save**.



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

## Replacement Language

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

- pages exist in the first language, but you want visitors to view the content in another language, for example if old content still exists.
- you have started to translate pages for all (or parts) of your website, but do not want to have mixed content until the site has been entirely translated. In this case you use replacement language until you have translated all the pages.



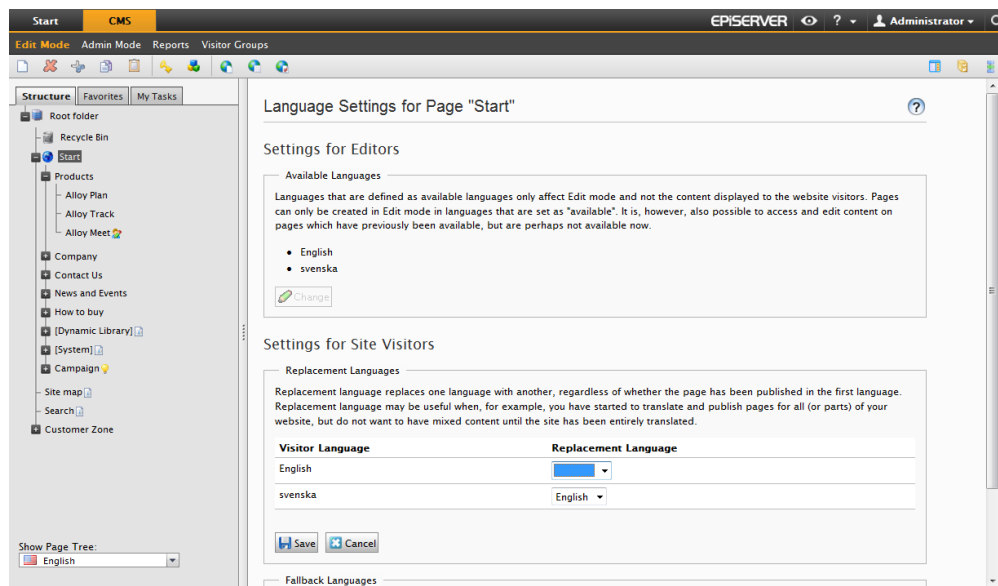
- If a sub-tree does not exist in the first language, set the second language as the replacement language to show content from that language instead.



Replacement language affects the language that website visitors see, but does not affect how pages are shown in Edit mode.



Replacement languages may cause mixed languages in the website which may cause confusion for the website visitor.



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

## Fallback Language

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



A flag icon next to the pages in the structure show that the page is missing for the current language and the fallback language will be displayed.

Fallback language may be useful when:

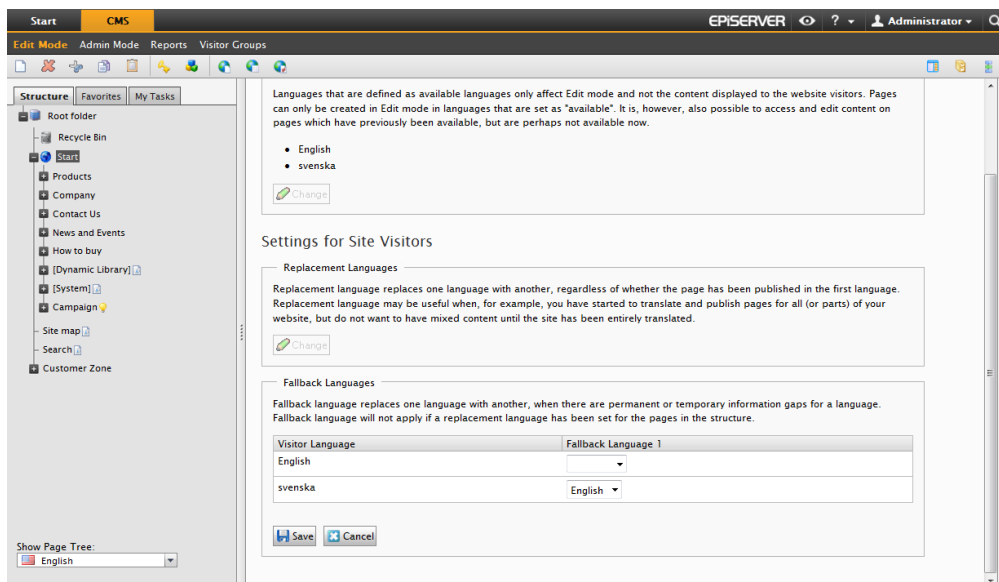
- pages are not available in the first language, but you want visitors to view the content in another language instead.
- you want to start translation of your website and want pages to be available in the final language when they are published, but until then the page should be shown in another language.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



Fallback language affects the language that website visitors see, but does not affect how my pages are shown in Edit mode.

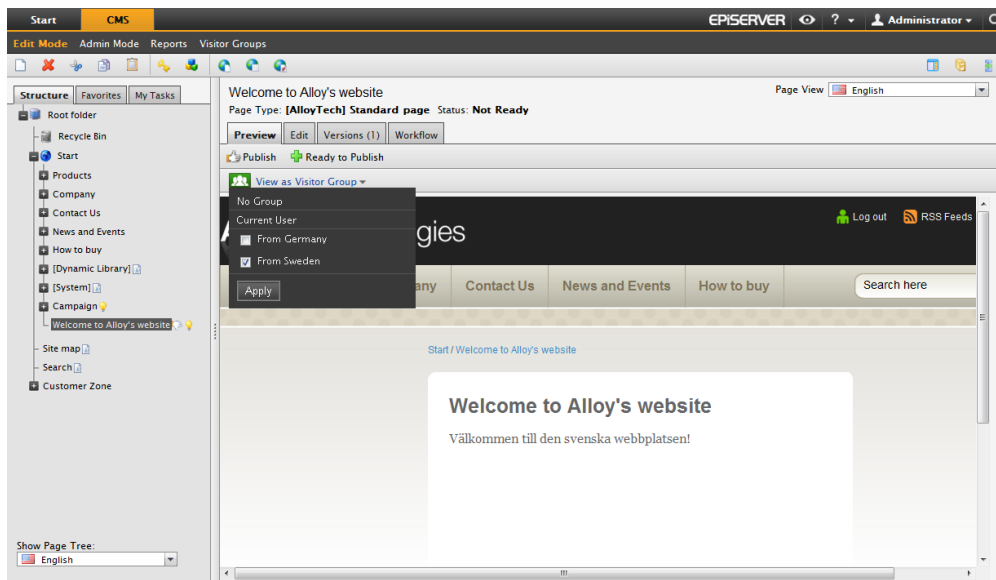


Fallback languages may cause mixed languages in the website which may cause confusion for the website visitor.



1. Select the main page in the structure for which you want to set the fallback language.
2. Right-click and select **Language Settings** or select **Language Settings** from the toolbar.
3. Clear the **Inherit settings from the parent page "xxxxx"** if you want to create special settings for this part of the site.
4. Select **Change** under **Fallback languages**.
5. Select the language to use as the fallback for the language the visitor chose. Select a second language to show if the content is not available in the first language.
6. Select **Save**.

# Working with Visitor Groups and Personalized Content



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

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

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

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

## Creating Personalized Content Work Procedure

Create personalized content in the following steps:

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


## Creating Personalized Content

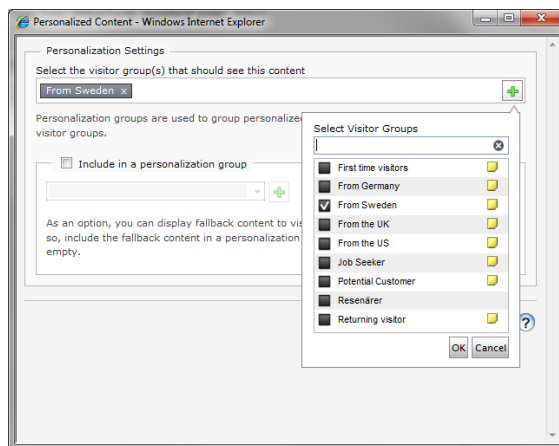
When you add personalized content on a page, you have the following options:

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

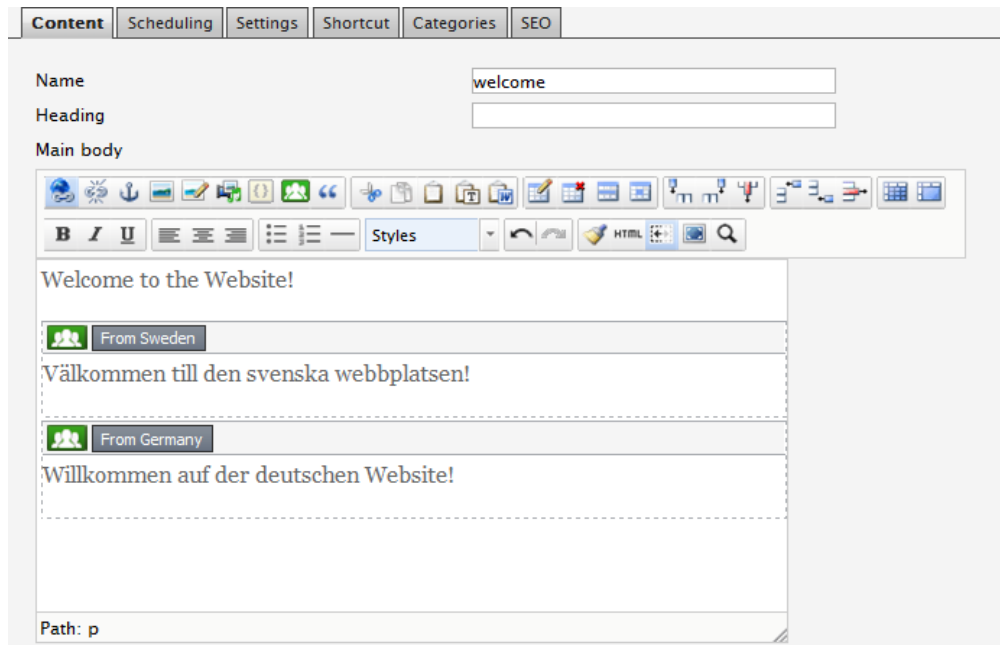
## Adding Personalized Content on a Page


Add personalized content on a page as follows:

1. Open the page that you want to contain the personalized content.
2. Select the content you want to personalize, and click the **Personalized content** toolbar button  in the Editor.
3. In the **Personalized content** window and **Personalization** section, click **+** to select one or several visitor groups from the list and click **OK**.



4. If you do not need any fallback content for visitors who do not match any visitor group, you can leave the **Include in a personalization group** blank (optional).
5. Click **OK** again. The personalized content is displayed as a box in the Editor. Note that the names of the included visitor groups are shown to the left.




6. Click the **Save and View** button and the **View as Visitor Group** drop-down list  **View as visitor group** to preview the page. By selecting one or several of the visitor groups check boxes and clicking **Apply**, you can see how your visitor groups will see the content on your page.
7. Click the **Edit** tab to continue to work on your page, or publish it.


## Changing Personalized Content on a Page

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

### Changing through the Personalized Content Box

1. Click the **Edit personalized content** button  in the personalized content box.
2. Make your changes to the personalized content and click **OK**.
3. Save the page.

### Changing through the Insert Personalized Content Button

1. Select the personalized content box, and click the **Personalized content** toolbar button .
2. Make your changes to the personalized content and click **OK**.
3. Save the page.



Cut and copy for a personalized content box in the Editor may work differently depending on the browser you use. Then you can use either the Cut/Copy toolbar buttons of the Editor, or the right-click Cut/Copy of your browser, instead of the keyboard keys




(CTRL+X and CTRL+C). If you have trouble placing the cursor immediately before or after a personalized content box in the Editor, try using the keyboard arrow keys instead of the mouse.

## Deleting Personalized Content from a Page

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

### Deleting Only the Personalization Markup

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

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

### Deleting Both Personalization Markup and Content

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

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

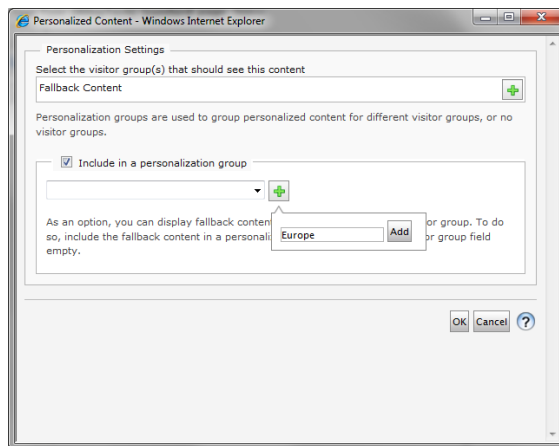
## Adding Personalized Content in Personalization Groups

If you have several visitor groups, it is possible that some individuals also are members in several visitor groups. Or, you want to show the same content to several visitor groups. To make sure that your personalized content on a page is only shown once for these, you can group your visitor groups to be treated as one. You may also need fallback content for the visitors who do not match any visitor group. Then only the personalized content on the first matching visitor group will be shown.

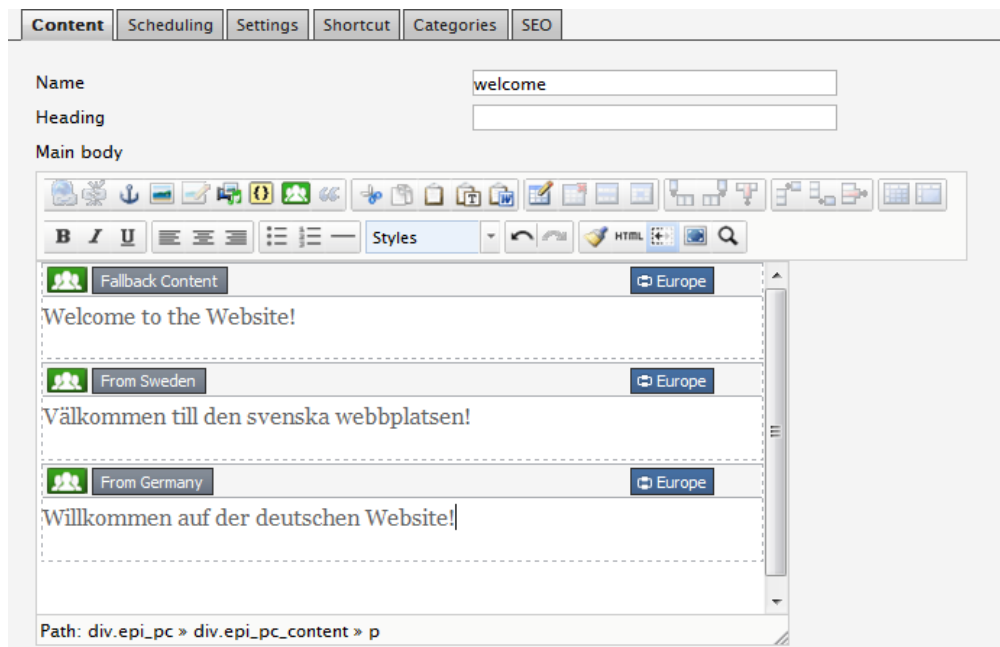
Example: Your organization wants to adapt content for visitors from Sweden and Germany, and also a piece of content to be shown by default if the visitor does not match any visitor group. If you want the content for all these visitor groups to be shown only once, you can group them by adding the personalization group "Europe" as follows:

1. Open the page and select the content you want to personalize for the visitor groups from Sweden and Germany, by following points 1-5 of the instruction in Adding Personalized Content on a Page.
2. Select the personalization group from the list to apply to the visitor groups that you have selected. To add a new personalization group, click **+**, name it click **Add**.
3. Select the content for the visitors who do not match any visitor group by selecting the **Include in a personalization group** check box and keeping **Fallback content** selected (with no other visitor group selected). Select the personalization group from the list to

apply to the fallback content, or add a new personalization group.



- Click **OK** again. The personalized content is displayed as a box in the Editor. Note that the names of the included visitor groups are shown to the left and the personalization group to the right.



- Click **Save and View** to preview the page. When you are done, publish it.

# Publishing from Microsoft Office

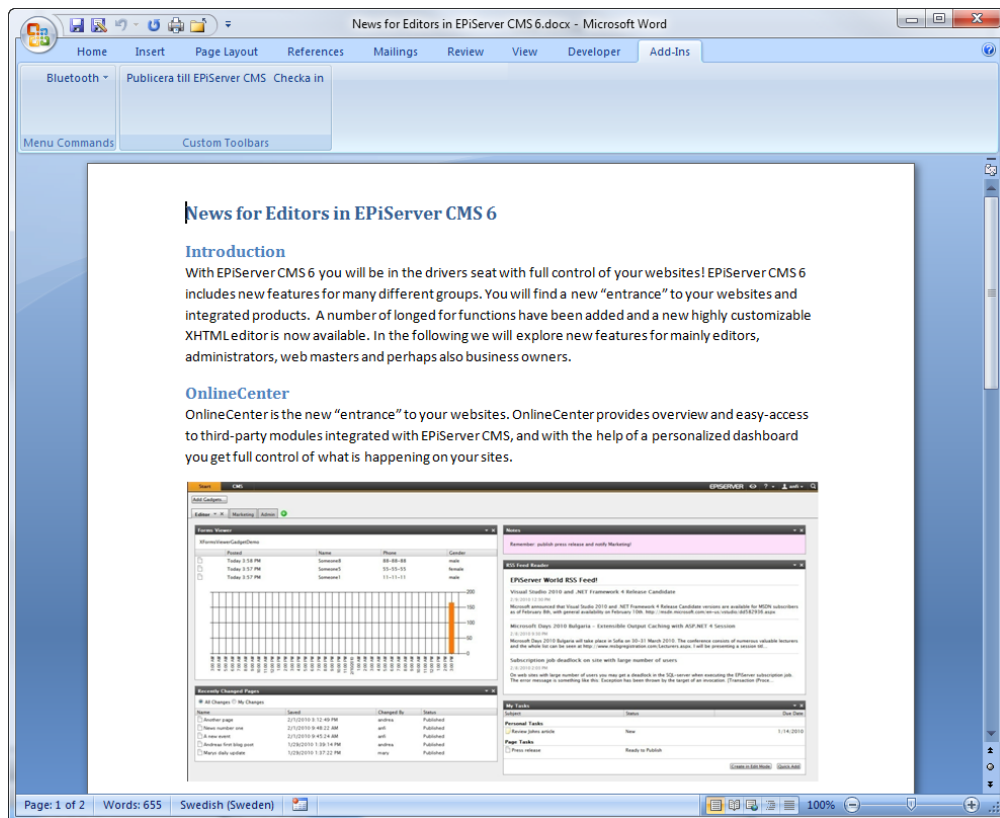
Documents created in the Microsoft Office programs Word, Excel or PowerPoint can be published directly from Office to EPiServer CMS. For this to work, you have to install a client program on your computer. You will then have a button in the Office programs with the name **Publish to EPiServer CMS**. Please note that in some cases you may need to add the button manually by customizing the toolbar in the program's main menu.

There are two methods of publishing from Office in a typical EPiServer CMS installation. You can publish so that the content of the document is converted to EPiServer CMS pages, which can be maintained from EPiServer CMS or Office. The content is filtered when this method of publishing is used. Formatting is stripped away so that design follows that of the website as much as possible. This filter can be adapted for each individual website so it may look different from the one you are working with.

The other publishing option in a typical installation is to publish information to a special page template in EPiServer CMS. This does not filter the content. EPiServer CMS publishes the HTML code generated by Office. Both options are described in the following section.

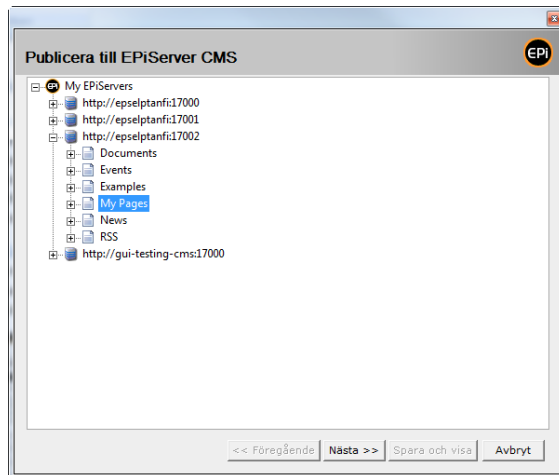
## Publishing from Office to Any Page Template in EPiServer CMS

1. The document is written in MS Office. When the document is ready to be published it must first be saved.
2. Select **Publish to EPiServer CMS** from the toolbar.

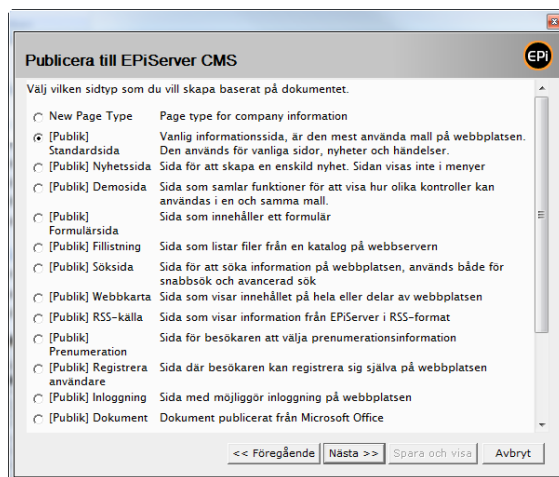




3. The dialog box for publishing to EPiServer CMS is opened. All the websites you can publish to are displayed with their tree structures. Select the page where you want to create a new page. Select **Next**.



4. Select the template you want to create a new page in. If the website has a predetermined template created in this menu then you cannot select a template. Select **Next**.



5. Depending on the template selected there may be fields to be filled in, such as page name, publishing date etc. The name of the page is derived automatically from the name

of the document, but you can change it if you wish. Fill in the fields and select **Next**.

6. The page is filtered and converted to EPiServer CMS format. Select **Save and view** to preview the page in EPiServer CMS.
7. A preview of the page is displayed, and you can select to **Publish** the page.

The page is now created in EPiServer CMS and any images have been stored in the page's folder. In the future you can maintain the page from EPiServer CMS, if you so wish.

There is a dynamic property that can be stored in that part of the tree that you published the page in. If you have this property set, you can also update the page from Word. If you open the document again and select **Publish to EPiServer CMS** you will be told that the document was previously published to EPiServer CMS and you can choose to make a new version of the previously published page or create a new page if you want. You can choose to make a new version of the previously published page or to create a new page.

## Publishing Parts of a Document

You can choose to publish parts of a document by first selecting those parts of the document you want to publish. Then select **Publish to EPiServer CMS**.

## The Format of Created Text

When publishing from Office and EPiServer CMS, the text is filtered to follow the design of the website as far as possible. This assumes that you have created a document using style templates just as you do in EPiServer CMS. In Office you can choose to format headings with Heading 1 etc. If you use style templates in Office the filter translates these to the style templates that apply to the website. If you have selected font, size and color, this is also transferred to the EPiServer CMS page.

The filter can be adapted for each website so may look different on your website. Contact your system administrator to find out what is applicable to your website.

## Publishing from Office Using the Document Page Template

There are two templates specially adapted for publishing from MS Office in a standard EPiServer CMS installation, **Document list** and **Document page**. The document list creates a list of all the documents published as sub-pages of the page. If a visitor clicks on the title an HTML version of the document is displayed. The template has an option to allow visitors to download the original document. If the visitor clicks on the document icon, the document is downloaded in its original format.

1. The document is written in MS Office. When the document is ready to be published it must first be saved.
2. Select **Publish to EPiServer CMS** from the toolbar.
3. The dialog box for publishing to EPiServer CMS is opened. All the websites you can publish to are displayed with their tree structures. Select the page created in the **Document list** template. Select **Next**.
4. Enter on the page the date of publication and any puff text. The name of the page is derived automatically from the name of the document, but you can change it if you wish. Fill in the fields and select **Next**.
5. The page is filtered and converted. Select **Save and view** to preview the page in EPiServer CMS.
6. A preview of the page is displayed, and you can select to **Publish** the page.

The page has now been created in the **Document page** template in EPiServer CMS. The information now exists in four different places.

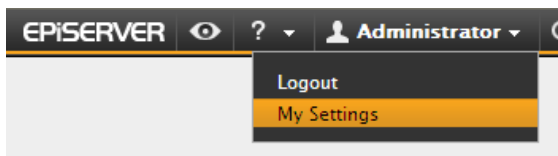
1. There is one file that is an HTML original in the page folder; this is the original we see on the page. It has not been filtered and is displayed just as if Office had created the HTML code.
2. The original document has also been uploaded to the page folder. This means that visitors can download the document from the document list.
3. The page also points to the original location of the document, the editor's computer for instance.
4. The content is also in the Editor in the page. This supports the search function on the website. Changes to that field do not affect what you see.

# Customizing Your Settings in EPiServer CMS

When you start working with EPiServer CMS, you should begin by exploring your own available customized settings. You can add your e-mail address and change the user interface language of the Edit and Admin modes of EPiServer CMS. Furthermore, you can install EPiServer CMS plug-ins on your computer, work with personal tasks and create shortcuts to your favorite pages.

## My Settings

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

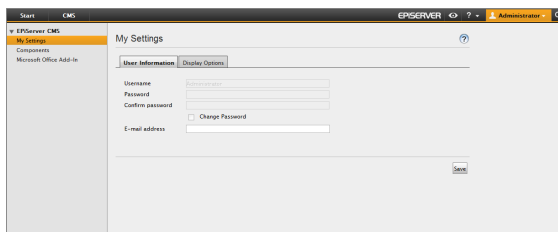


From **My Settings** you can also access the installation of components and Microsoft Office plug-ins.

## User Information

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

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

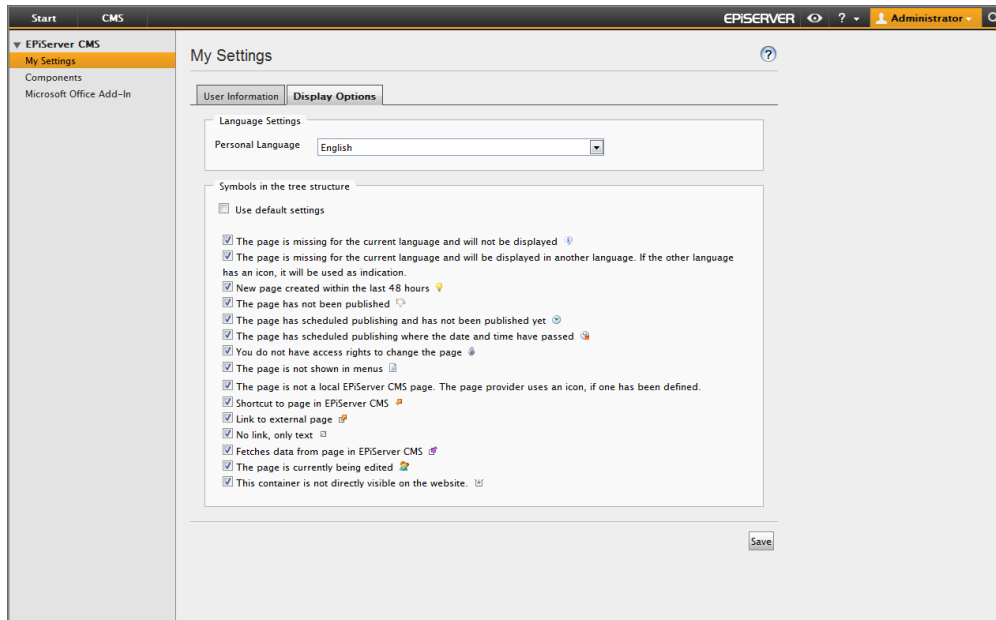


## Display Options

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

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

If you select **Use default settings** under **Symbols in the tree structure**, all the available symbols will be used in the tree structure. If instead you clear **Use default settings**, you can choose which symbols you want to see in the tree structure by selecting or clearing the check boxes.



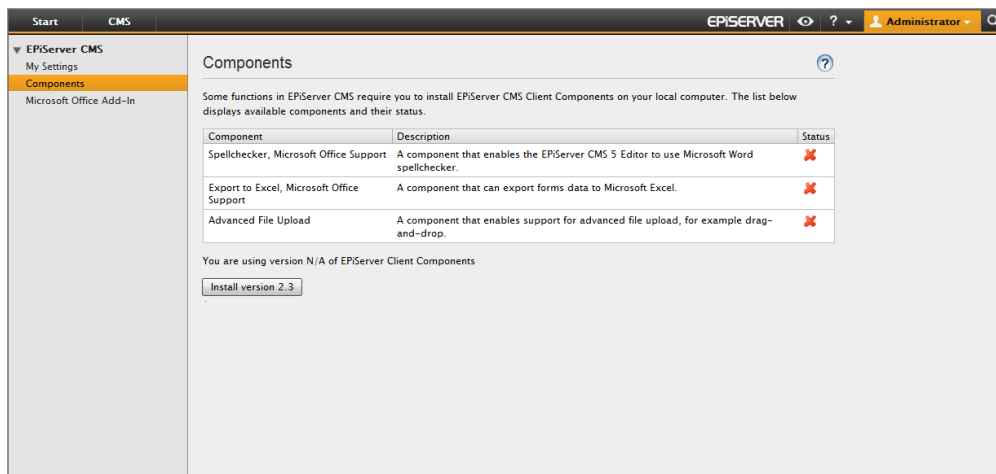
## Components

For certain functions in EPiServer CMS you need to install components on the computer on which you are working. Installation takes place by downloading the software from the Internet. The functions that require client programs are:

- Export to Excel, Microsoft Office - for exporting of form data to Microsoft Excel.
- Advanced file uploading - for advanced file uploading by drag-and-drop operations



The **Spellchecker, Microsoft Office Support** component only applies if you are using the EPiServer CMS 5 HTML Editor and not the TinyMCE HTML Editor. Refer to the user documentation for EPiServer CMS 5 for further information about this.



To access the installation of components, select **My Settings** under **Administrator** in the upper right corner of the top menu, then select **Components** in the left column.

The list shows the installed components. Those ticked green are installed on your computer. Those crossed red are not installed. Select **Install** if you want to install the client software, and follow the instructions in the dialog boxes.

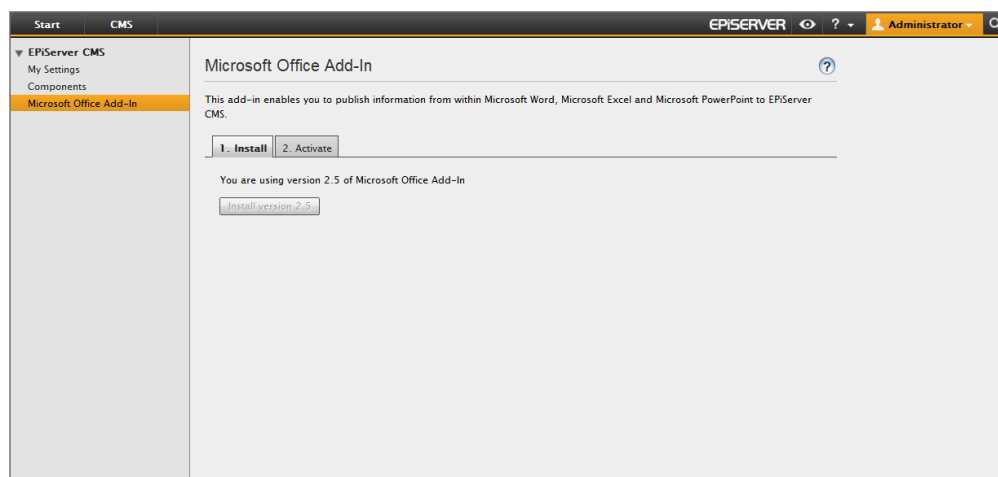
## Microsoft Office Add-In

To publish information directly from Microsoft Office to EPiServer CMS you must install an Office add-in on the computer on which you are working. You must also activate the websites you are working with for publishing in MS Office. Before you install the Office add-in and activate the website, your system administrator must give you authorization to publish from Microsoft Office. When you then install the Office add-in, you will have access to the option **Publish to EPiServer CMS** in MS Word, Excel and PowerPoint.

To access the Office add-in installation and activation, select **My Settings** under **Administrator** in the upper right corner of the top menu, then select **Microsoft Office Add-in** in the left column.

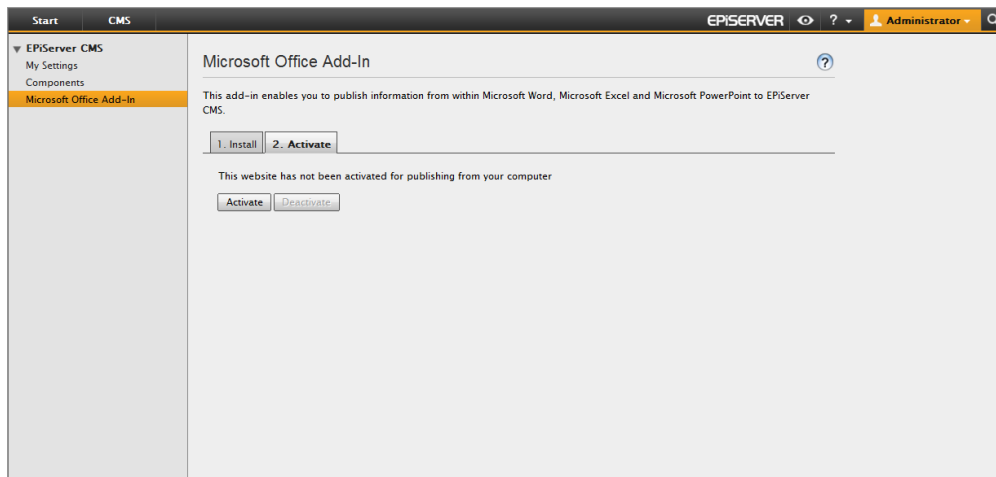
## Installing the Microsoft Office Add-In

See the version of the add-in installed on the **Install** tab. If you do not have the latest version the **Install** button is activated and you can follow the setup program to install the add-in.



## Activating and Deactivating

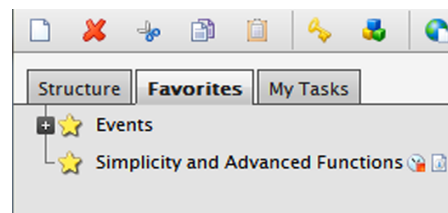
Use the **Activate** tab to make the current website a target for your publications. By selecting the **Activate** button you can publish with Office to several different websites. To disable publication from Office to the website, select **Deactivate**.



## Favorites Tab

The **Favorites** tab is available in the left column in Edit mode, and shows the pages you have selected as favorites in the tree structure. From there you can quickly access your most frequently used pages.

To include a page and its sub-pages with your favorites, right-click the page in the structure and select **Add to Favorites**. To delete a favorite, follow the same procedure but right-click the page in the Favorites tab, select **Remove Favorite**.



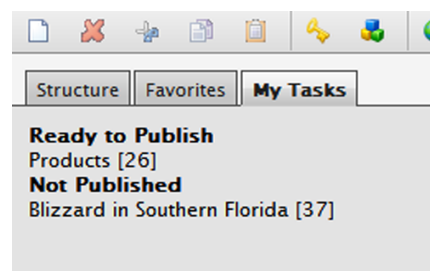
## My Tasks Tab

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

Tasks can be created automatically by the system, or manually by users inside the Edit mode. Tasks can be assigned to individuals or to a group of users. Tasks are displayed under the **My Task** tab in the left column in Edit mode, or from the **Action Window**, which is available as a button in the upper right toolbar.

On the **My Tasks** tab in Edit mode, you will find a list of the various tasks you or your group have been assigned. All editors can have tasks assigned to them personally or to an entire group. The system also identifies which pages you have edited, saved and published.

This information is compiled under the following headings:



- **Not Published.** Pages you have saved but not yet published. It is easy to keep track of whether you have forgotten to publish pages by looking under this heading. In order to continue working on the page, select the name of the page listed under the heading **Not published**.
- **Personal Tasks.** Tasks that somebody has allocated to you personally.
- **Group Tasks.** Tasks that somebody has allocated to the group you belong to. Click the name to see who allocated the task to you and what it involves. The task opens in the Action Window on the right in the web browser.
- **Ready to Publish.** Pages that an editor without publication rights has submitted for publication. The editor-in-chief can review the pages to approve for publication by clicking the name of the page. The editor-in-chief can find the pages that the editors have submitted for approval here. The editor-in-chief reviews the page, and approves it by clicking **Publish**.
- **My Assigned Tasks.** Tasks that you have allocated to others.
- **Permanent Edit.** Pages that you have set as in use, see "Options for Editing" on page 17. When you disable



By pointing towards the options shown on the **My Tasks** tab, you can see who created the version and when, plus the search path to the page.

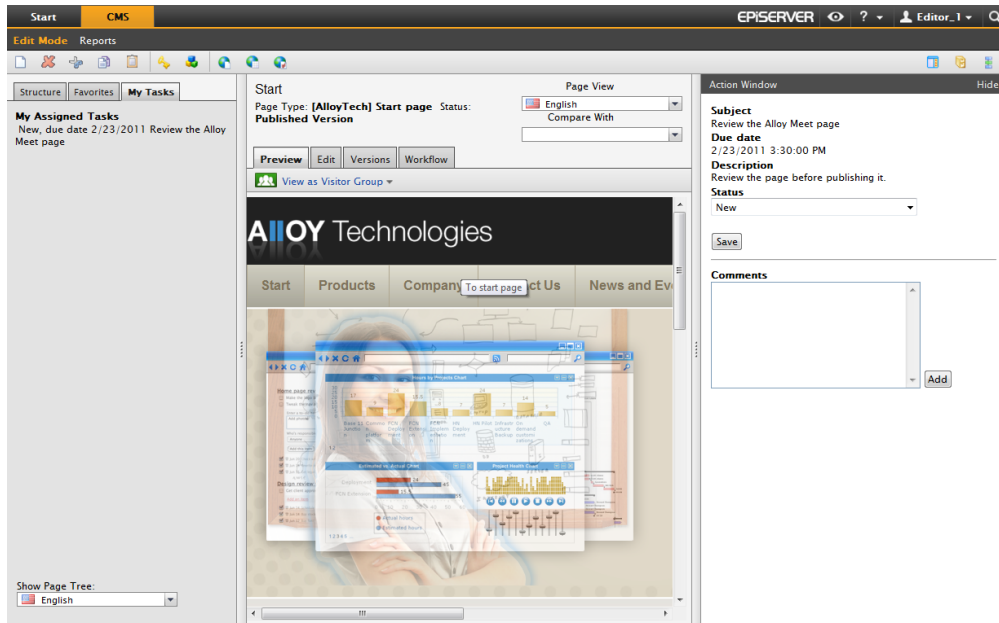
## Creating a Task

In the Action Window in EPiServer CMS you can create and allocate tasks to others as follows:

1. From the Tools menu, open the **Action Window** and select **Create New Task**.
2. Type the name of the task.
3. Select a due date to finish the task, if applicable.
4. Select an individual or group to which to allocate the task.
5. Type a brief description about the task and what the individual/group has to do.
6. Click **Save**.



## Carrying Out an Assigned Task



Allocated tasks are shown on the **My Tasks** tab as follows:

- Tasks that have been assigned to you personally are shown under the heading **Personal Tasks** for you to take action.
- Tasks that have been assigned to your entire group are shown under the heading **Group Tasks**, and someone in the group must act on the task.

Carry out a task as follows:

1. Select the **My Tasks** tab.
2. Click the task to be carried out, and to see who allocated the task to you and what it involves. The task opens in the Action Window on the right in the web browser. Different fields enter are shown in the Action Window depending on what type of workflow it is. Normally a comment box is shown, in which you can type comments. You have the following options:
  - Select a status for the task, type a comment if applicable and select **Add**. When you are done, click **Save**. You can also click **Refuse** to send back the task to the person who allocated it. By clicking **Settings** you can change or delete the task.
  - If you have been assigned a task via a workflow, type your comments and click **Send**. If you have entered your e-mail address in your user account, the task will also be sent to you by e-mail..
3. When the task is complete, it disappears from the **My Tasks** tab.

# Setting up Workflows in EPiServer CMS

EPiServer CMS supports various types of workflow, which for example means you can be allocated a task or allocate a task according to a predetermined flow. An editor could, for example, create a page that has to be approved by one or more individuals before it is published. Who approves the page is decided in advance in the workflow, and the task is allocated to various individuals. The workflows are set up by your EPiServer CMS supplier in cooperation with your system administrator. Four workflows are delivered with the standard installation. Two for approval of pages, one for managing several languages and one for requesting feedback. Your system administrator can customize, change and create more workflows.

Tasks in a workflow that have been assigned to you personally or anyone in your group are shown on the **My Tasks** tab, and it works in a similar way as described in "My Tasks Tab" on page 111.

## Starting Point in the Workflow

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

## Activate a Workflow Manually

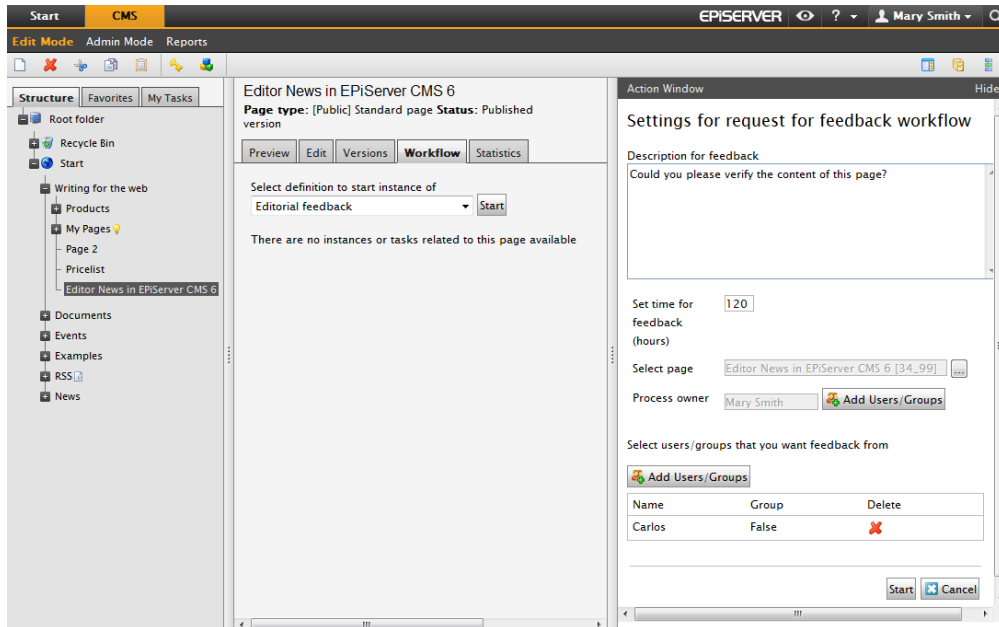
When you set up one or several workflows for the website, you select whether they can be started manually or automatically. They usually start automatically at a certain location in the structure. In a typical EPiServer CMS installation, there is a workflow suitable for manual start and this is the workflow for requesting feedback. The purpose of this workflow is that an individual editor should be able to receive feedback about something he or she has done on the page. The editor perhaps wants help selecting an image, with spelling or other language issues. It is thus possible to ask for help through EPiServer CMS instead of sending an e-mail or calling to ask the same question.

Create a workflow manually as follows:

1. The editor creates a page in Edit mode and saves it.
2. Select the **Workflow** tab, or the **Start workflow** button in the tool menu. In this example, the Workflow tab is selected.
3. In the drop-down menu select the workflow that you want to start.
4. The Action Window in EPiServer opens and you can enter the setting for this particular type of workflow. The type of settings you can enter vary for different types of workflows.
5. In the Request Feedback workflow you can write in what you want help with. You can enter a time frame for how long the feedback can take. You can choose who will be the owner of the flow. This is normally you. Finally, you can also choose which group or user will receive the task.

6. When you have made the settings for the inbox, select **Start**.
7. The workflow now starts, and a task is sent to the first individual you have chosen.

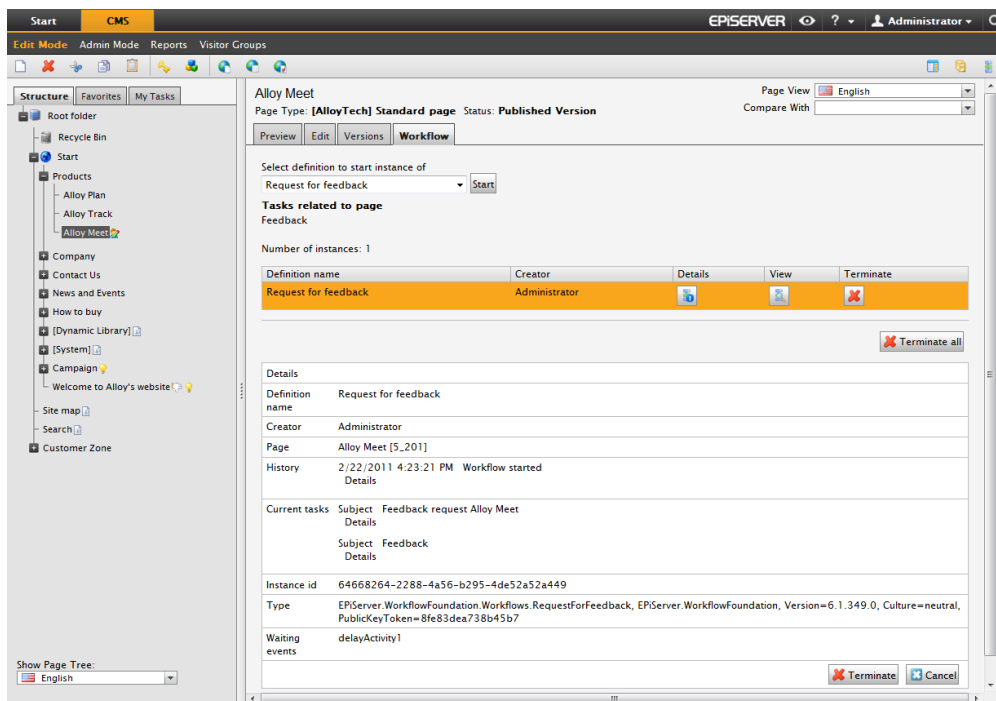
If you are not given any workflows to select from, it is because workflows cannot be started manually in your installation.



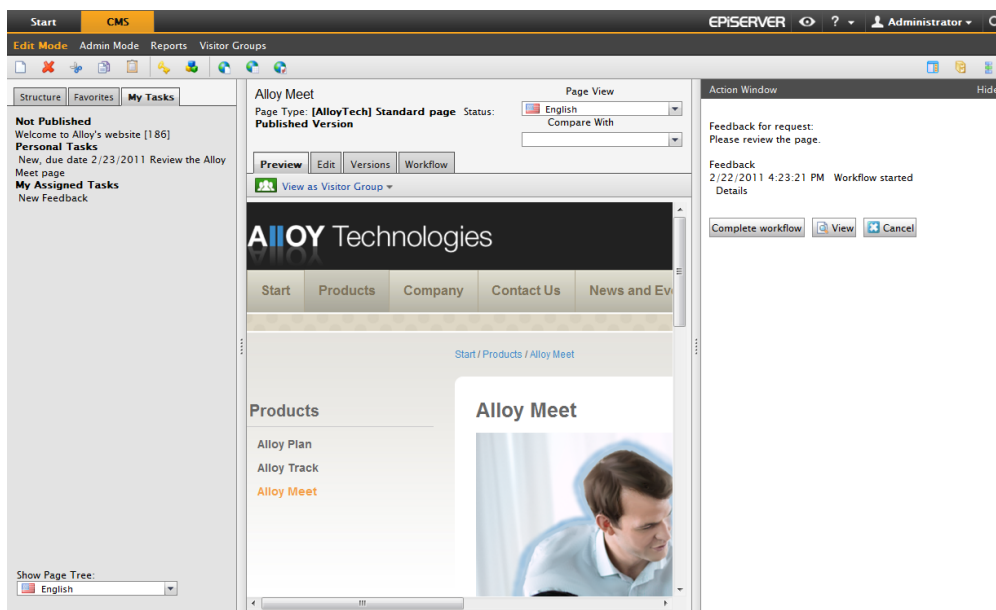
## Workflows I Have Started

All the workflows you have started, manually or automatically, are listed under the **Workflow** tab in the page in question. Here you can get more information about the workflows and their status, and read the comments from others involved in the flow.

Click the **Details** button to see where the workflow is right now. In the History row, you can click the **Details** links to view comments from people in the workflow.



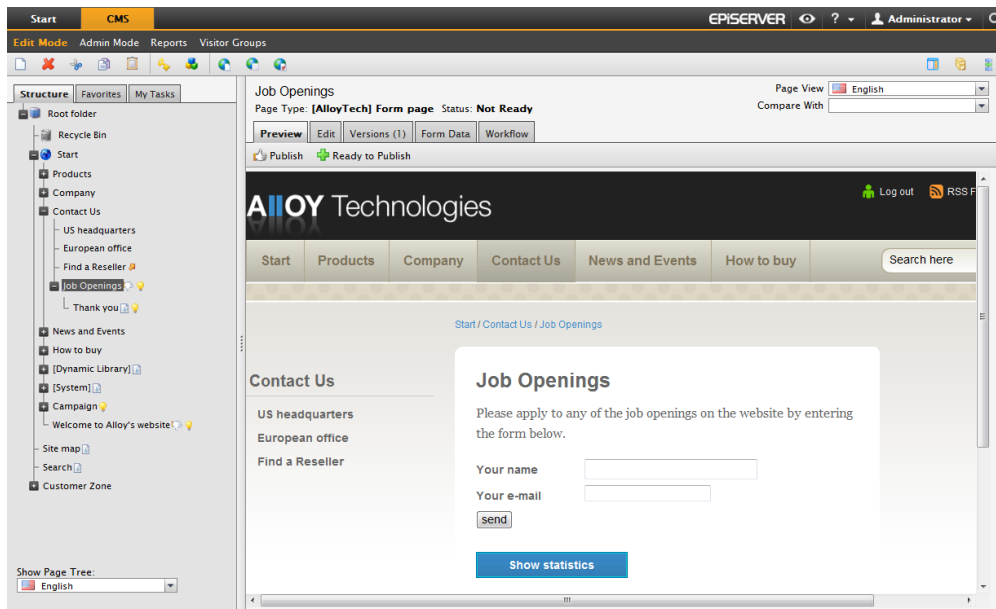
If you have forgotten which page you started the workflow on or do not want to have to find the page in the structure, you can also find the details on the **My Tasks** tab. If you click the link, the page opens together with the Action Window, in which you can see the comments made by other people in the workflow.



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

# Forms Pages

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






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

## Administering Forms

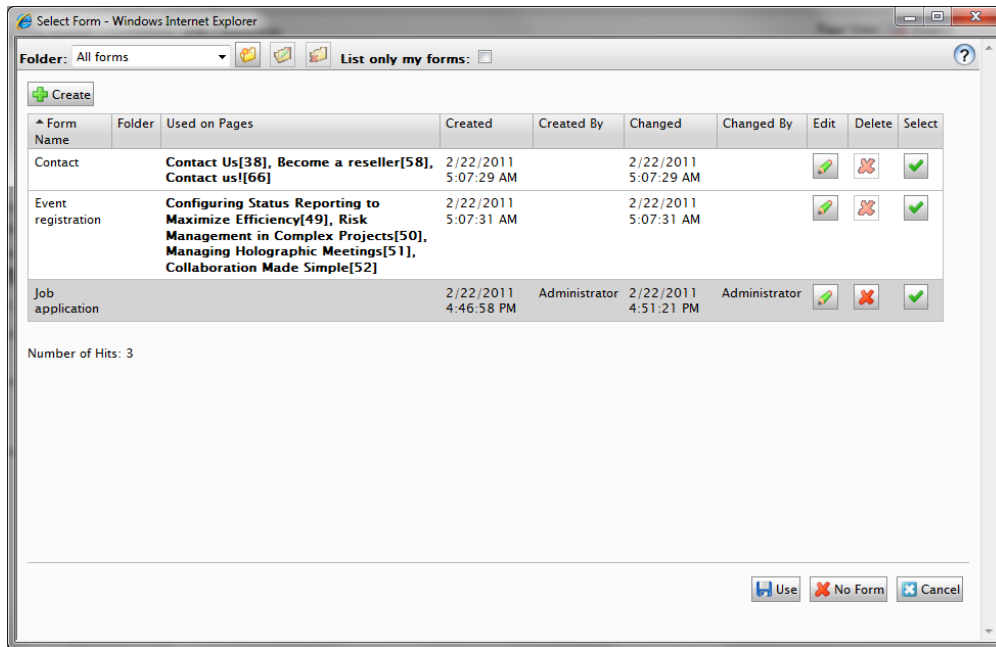
Forms are administered in the **Select Form** dialog, which is where it is possible to build a folder structure to more easily structure all forms on the website. The **Select Form** dialog is reached by clicking the **Browse** button in the **Form** field in the **Form** page template.

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

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

	Click <b>Create new form folder</b> to create new folders.
	Click <b>Rename selected form folder</b> to change the name of the selected folder.
	Click <b>Delete selected form folder</b> to delete the selected folder. You can only delete folders that do not contain any forms.

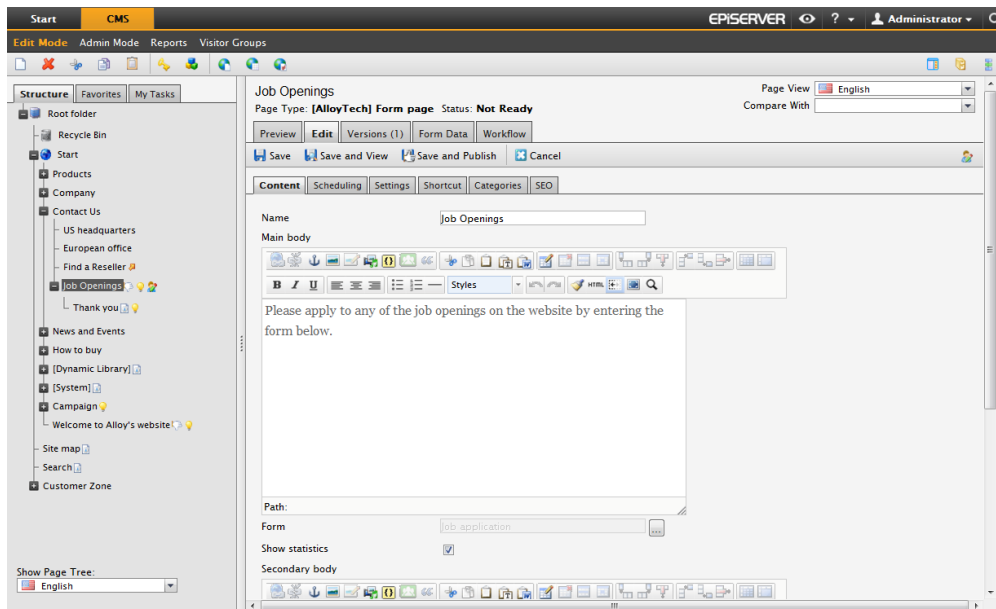
The forms can be placed in the different folders when you edit or create them.



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

## Creating a Form

1. Create a new page based on the **Form page** template where you want the form to be placed.
2. Type a name for the page and enter information in the Editor to describe what the visitor is to fill in.
3. Select **Show statistics** if you want visitors to be able to see a compilation of all responses submitted to the website. If you do not specify this, only those that have access to Edit mode will be able to see the results. This is often used when you want to create a question for which visitors can see the results of all the answers.
4. In **Form**, specify which form is to be used by clicking the **Browse** button to the right of the field.
5. The **Select Form** dialog opens and you can choose to **Select** or **Edit** an existing form, or **Create** a totally new form.
6. When you have finished working with the form, select **Save and Publish**.



## Editing a Form

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

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

Save Save and Close Save as ... Delete Cancel

Name of form Job application

Form folder No folder

Page shown after the form has been sent Thank you [188]

☒ Form can be sent without logging in

☒ Same person can send the form several times

Table Layout Form Fields Import/Export

The Table Layout tab is used to design the layout of your form.

Insert Row Add Row Delete Row Insert Column Add Column Delete Column

Your name	
Your e-mail	

send

**Properties for text box**

Name email

Heading Your e-mail

ToolTip Type your e-mail address, max

Width (number of characters) 20

☒ Value must be entered

CSS class email

Validate as E-mail address

Save Delete Cancel

## Building Up a Form

Forms in EPiServer CMS are built up as tables, which are created and edited in the lower part of the **Edit Form** dialog. The three tabs **Table Layout**, **Form Fields** and **Import/Export** are used to create your form.

### Table Layout Tab

The **Table Layout** tab is used to design the layout of your form. The table in this tab must contain at least one cell (row or column) before you can add fields in the **Form Fields** tab.

Rows and columns can only be inserted into the table in this tab, although the settings for the form fields can also be updated here.

- Click **Insert Row** to insert a row above the row that is currently selected.
- Click **Add Row** to add a row at the bottom of the table.
- Click **Delete Row** to delete the selected row.
- Click **Insert Column** to insert a column to the left of the selected column.
- Click **Add Column** to add a column to the far right of the table.
- Click **Delete Column** to delete the selected column.



The form fields can be moved around within the table to an empty cell by first clicking the form field to be moved. Place the cursor over the icon to the left of the cell representing the type of form field and drag the field to an empty cell. This can be done from all of the tabs in the **Edit Form** dialog.

## Form Fields Tab

The form fields that can be added to a form are displayed at the top of the **Form Fields** tab. Add a form field to a table by dragging the field in question to an empty cell in the table. Each cell in the table can only contain one form field.

## Import/Export Tab

The Import/Export tab is used to export and import forms from and into a page in EPiServer CMS. Forms can be exported, for example, if you want to display them on another EPiServer CMS website, or within another application.

Forms are exported in XML format. To export a form, click **Export** and select whether you want to open the form or save it to your computer. Import a form by first browsing to the form in question and then click **Import**. Note that import will overwrite any unsaved changes to the form content and layout.

## Form Field Settings

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

The screenshot shows the 'Edit Form' interface in Internet Explorer. At the top, there are buttons for 'Save', 'Save and Close', 'Save as ...', 'Delete', and 'Cancel'. Below these are form configuration fields: 'Name of form' (Job application), 'Form folder' (No folder), and 'Page shown after the form has been sent' (Thank you [188]). There are also checkboxes for 'Form can be sent without logging in' and 'Same person can send the form several times'. The 'Table Layout' tab is selected, showing a preview of a form with two text boxes: 'Your name' and 'Your e-mail', and a 'send' button. To the right of the preview is a 'Properties for text box' panel for the 'email' field. This panel includes fields for 'Name' (email), 'Heading' (Your e-mail), 'ToolTip' (Type your e-mail address, max), 'Width (number of characters)' (20), a checked 'Value must be entered' checkbox, 'CSS class' (email), and 'Validate as' (E-mail address). At the bottom of the properties panel are 'Save', 'Delete', and 'Cancel' buttons.

The properties in the table below exist for most fields:

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

Validate as	Validate as enables you to check whether the visitor has filled in the right type of information in a field. You can for example check whether it is an e-mail address, check a date format or various types of numbers.
-------------	--

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

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

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

## About the Field Types in the Form

### Text box

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

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

### Text area

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

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

### Drop-down list

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

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

### Radio button

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

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

## Check box

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

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

## Button

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

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

## Heading

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

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

## Horizontal rule

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

## Retrieving Form Data

If you choose to save the information submitted in your form in the database, you can find all the forms with their submitted information in the **Form Data** tab. This tab is displayed next to the **Version** tab when you have saved and published your form page.

### Retrieve Data from the Database:

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

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

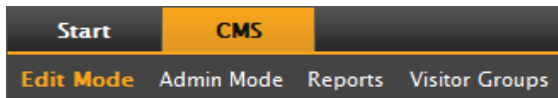
- To delete certain postings from the form data, select the postings to be deleted and click **Delete Selected Postings**.
- Click **Delete All Postings** to delete all the form data that has been received.
- Click **Export to Excel** to export the data to Microsoft Excel. To do this, Excel must be installed on your computer together with a specific component. "Components" on page 109.
- Click **Export to XML** to export the form data to an XML file.

The screenshot shows the EPiServer CMS interface. On the left is a 'Structure' sidebar with a tree view of the site's content. The main area is titled 'Job Openings' and shows the 'Form Data' tab for a 'Job application' form. It includes search filters for 'From date', 'To date', and 'Number of hits per page' (set to 50). A 'Search' button is present. Below the filters, a table displays 2 matches. At the bottom, there are buttons for 'Export to Excel', 'Export as XML', 'Delete Selected Postings', and 'Delete All Postings'.

Select all	DatePosted	User	name	email
<input type="checkbox"/>	2/22/2011 5:10:32 PM		Mary Stillner	mary@xxx.com
<input type="checkbox"/>	2/22/2011 5:11:11 PM		Tom Jones	tom@xxx.com

# EPiServer CMS Report Center

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



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

There are several page reports in the standard installation of EPiServer CMS, although other customized reports may also be available in your EPiServer CMS site, developed by your implementation partner. This manual describes the page reports that are included in the standard installation of EPiServer CMS.

## Not Published Pages

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

 The screenshot shows the 'Not Published Pages' report in the EPiServer CMS interface. On the left is a sidebar with a 'Page Reports' section containing links to 'Not Published Pages', 'Published Pages', 'Changed Pages', 'Expired Pages', 'Simple Addresses', and 'Link Status'. The main area has a title 'Not Published Pages' with a help icon. Below the title is a description: 'This report displays pages that have not yet been published and have a last changed date within a certain time span. Select a page from the list of report results to open it in Edit mode.' A 'Report Criteria' section contains filters for 'Changed' (with links for 'Last 30 days', 'Last 7 days', 'Yesterday', and 'Today'), 'Last changed' (a date range from 2011-01-24 00:00 to 2011-02-23 00:00), 'Search start page' (a dropdown set to 'Start [3]'), 'Ready to publish?' (radio buttons for 'Yes' and 'No', with 'No' selected), 'Last changed by me' (a checkbox), and 'Language' (a dropdown set to 'All'). A 'Show Report' button is below the criteria. Below the button, it says 'Number of Hits: 1' and 'Number of items per page: 10'. At the bottom is a table with the following data:
 

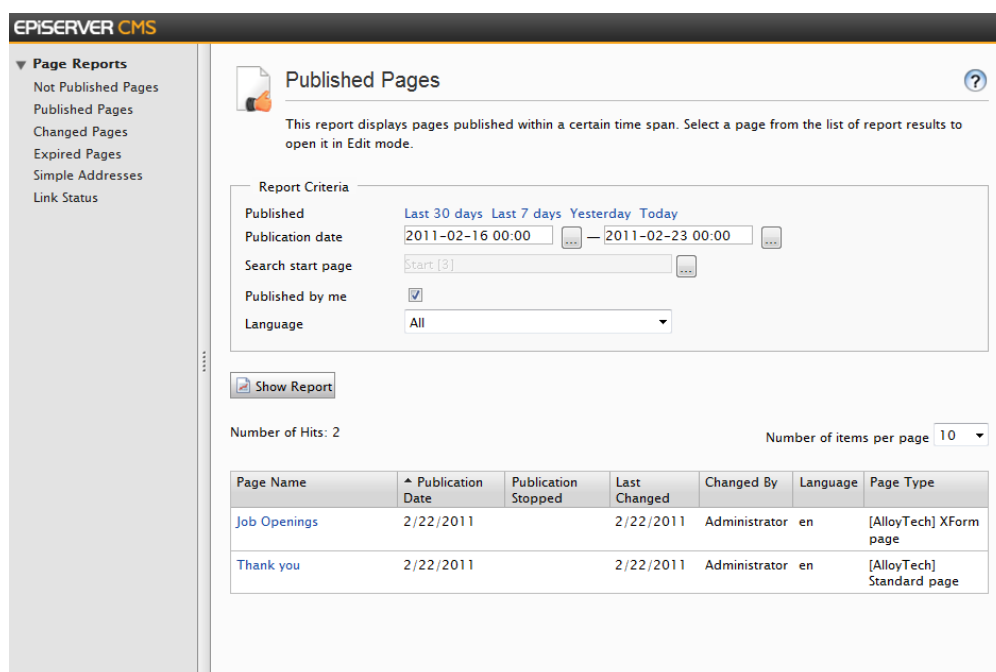
Page Name	Version	Publication Date	Last Changed	Changed By	Language
Welcome to Alloy's website	1	2/22/2011	2/22/2011	Administrator	en

**Create a report for pages with status Not Published:**

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

## Published Pages

This report displays pages published within a certain time span.



**EPISERVER CMS**

▼ **Page Reports**

- Not Published Pages
- Published Pages
- Changed Pages
- Expired Pages
- Simple Addresses
- Link Status

### Published Pages

This report displays pages published within a certain time span. Select a page from the list of report results to open it in Edit mode.

**Report Criteria**

Published: [Last 30 days](#) [Last 7 days](#) [Yesterday](#) [Today](#)

Publication date: 2011-02-16 00:00 — 2011-02-23 00:00

Search start page: Start [3]

Published by me: ☒

Language: All

**Show Report**

Number of Hits: 2      Number of items per page: 10

Page Name	Publication Date	Publication Stopped	Last Changed	Changed By	Language	Page Type
<a href="#">Job Openings</a>	2/22/2011		2/22/2011	Administrator	en	[AlloyTech] XForm page
<a href="#">Thank you</a>	2/22/2011		2/22/2011	Administrator	en	[AlloyTech] Standard page

### Create a report for published pages:

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

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

## Changed Pages

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

**EPISERVER CMS**

▼ **Page Reports**  
 Not Published Pages  
 Published Pages  
 Changed Pages  
 Expired Pages  
 Simple Addresses  
 Link Status

### Changed Pages

This report displays pages that have a changed date within a certain time span. Select a page from the list of report results to open it in Edit mode.

**Report Criteria**

Changed: [Last 30 days](#) [Last 7 days](#) [Yesterday](#) [Today](#)

Between: 2011-02-16 00:00 — 2011-02-23 00:00

Search start page: Start [3]

Last changed by me: ☒

Language: All

**Show Report**

Number of Hits: 3      Number of items per page: 10

Page Name	▲ Last Changed	Changed By	Language	Page Type
<a href="#">Alloy Meet</a>	2/22/2011	Administrator	en	[AlloyTech] Standard page
<a href="#">Thank you</a>	2/22/2011	Administrator	en	[AlloyTech] Standard page
<a href="#">Job Openings</a>	2/22/2011	Administrator	en	[AlloyTech] XForm page

### Create a report for changed pages:

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



## Expired Pages

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

**Page Reports**

- Not Published Pages
- Published Pages
- Changed Pages
- Expired Pages
- Simple Addresses
- Link Status

### Expired Pages

This report displays pages with stop publish date within a certain time span. Select a page from the list of report results to open it in Edit mode.

**Report Criteria**

Expired: [Last 30 days](#) [Last 7 days](#) [Next 7 days](#) [Next 30 days](#)

Publication stopped: 2011-02-16 00:00 — 2011-02-23 00:00

Search start page: Start [3]

Published by me: ☐

Language: All

[Show Report](#)

Number of Hits: 1 Number of items per page: 10

Page Name	Publication Date	Publication Stopped	Last Changed	Changed By	Language	Page Type
<a href="#">Job Openings</a>	2/22/2011	2/22/2011	2/22/2011	Administrator	en	[AlloyTech] XForm page

### Create a report for expired pages:

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

## Simple Addresses

This report displays published pages that have a simple address.

**Simple Addresses**

This report displays published pages that have a simple address. Select a page from the list of report results to open it in Edit mode.

**Report Criteria**

Search start page: Start [3]

Language: All

Show Report

Number of Hits: 1      Number of items per page: 10

Page Name	Simple Address	Changed By	Language	Published Status	Visible in Menus
US headquarters	US-HQ	Administrator	en	Published	

#### Create a report for published pages that have simple addresses:

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

## Link Status

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

The screenshot shows the EPiServer CMS interface. On the left is a sidebar with a 'Page Reports' section containing links to 'Not Published Pages', 'Published Pages', 'Changed Pages', 'Expired Pages', 'Simple Addresses', and 'Link Status'. The main content area is titled 'Link Status' and includes a help icon. Below the title is a descriptive text: 'This report displays links that could not be reached. This could for example be due to a page being moved, or a site shut down, or that the target link cannot be read at the moment.' Underneath is a 'Report Criteria' section with a 'Search start page' field containing 'Start [3]' and a browse button. A 'Show Report' button is located below the criteria. At the bottom of the criteria section, it says 'Number of Hits: 0' and 'Items per Page' with a dropdown menu set to '10'.

**Create a link status report displaying broken links:**

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

