

EPiSERVER

EPiServer 7.5 CMS

---

**User Guide for Editors**



Copyright © EPiServer AB

User Guide for Editors – EPiServer 7.5 CMS

Revision A, 2013

# Table of contents

---

|   |           |
|---|-----------|
| <b>Table of contents</b>                      | <b>3</b>  |
| <b>Introduction</b>                           | <b>5</b>  |
| About this documentation                      | 5         |
| EPiServer help system                         | 5         |
| Online community on EPiServer World           | 5         |
| Copyright notice                              | 5         |
| <b>About EPiServer CMS</b>                    | <b>6</b>  |
| <b>Getting started</b>                        | <b>10</b> |
| Logging in                                    | 10        |
| Navigating from the global menu               | 10        |
| <b>Generic functions, toolbar and panes</b>   | <b>12</b> |
| On-page editing view                          | 13        |
| All properties editing view                   | 16        |
| Navigation pane                               | 16        |
| Assets pane                                   | 17        |
| <b>Sample site and templates</b>              | <b>19</b> |
| Sample pages and blocks                       | 20        |
| <b>Working in edit view</b>                   | <b>21</b> |
| Editing directly on a page                    | 21        |
| Editing content in the flyout pane            | 23        |
| Editing all properties                        | 23        |
| Previewing                                    | 23        |
| <b>Saving and publishing content</b>          | <b>24</b> |
| Using autosave                                | 24        |
| Publishing a page                             | 24        |
| Setting a stop date                           | 27        |
| <b>Creating content</b>                       | <b>29</b> |
| Creating pages                                | 29        |
| Creating blocks                               | 31        |
| Creating content based on other content types | 31        |
| <b>Previewing</b>                             | <b>32</b> |
| <b>Using the rich-text editor</b>             | <b>34</b> |
| Creating links                                | 35        |
| Formatting text                               | 43        |
| Adding and editing images                     | 45        |
| Adding tables                                 | 49        |
| <b>Editing all content properties</b>         | <b>54</b> |
| Page settings                                 | 54        |
| Tab bar and content                           | 56        |
| Setting access rights from edit view          | 60        |
| <b>Assets</b>                                 | <b>62</b> |
| Blocks  | 62        |
| Folders                                       | 68        |

|  |            |
|--|------------|
| Media .....  | 70         |
| Adding dynamic content .....                           | 75         |
| <b>Structuring the website .....</b>                   | <b>78</b>  |
| Symbols for pages in the tree structure .....          | 78         |
| Moving, copying and removing pages .....               | 78         |
| Sorting page order in menus .....                      | 80         |
| Handling content in trash .....                        | 82         |
| <b>Managing versions .....</b>                         | <b>84</b>  |
| <b>Globalizing content .....</b>                       | <b>88</b>  |
| Step 1: Selecting language .....                       | 88         |
| Step 2: Creating content in another language .....     | 89         |
| Defining language settings .....                       | 92         |
| <b>Personalizing content .....</b>                     | <b>95</b>  |
| Personalizing content using the content area .....     | 95         |
| Personalizing content using the rich-text editor ..... | 97         |
| Changing personalized content .....                    | 99         |
| Removing personalized content .....                    | 100        |
| Personalizing content using access rights .....        | 100        |
| <b>Using forms .....</b>                               | <b>101</b> |
| Administering forms .....                              | 101        |
| Building up a form .....                               | 102        |
| Viewing and exporting form data .....                  | 106        |
| <b>Reports .....</b>                                   | <b>109</b> |
| Not Published Pages .....                              | 109        |
| Published Pages .....                                  | 110        |
| Changed Pages .....                                    | 111        |
| Expired Pages .....                                    | 112        |
| Simple Addresses .....                                 | 112        |
| Link Status .....                                      | 113        |
| <b>Using workflows .....</b>                           | <b>115</b> |
| Starting a workflow manually .....                     | 115        |
| Handling your assigned tasks .....                     | 116        |
| <b>Customizing user interface settings .....</b>       | <b>117</b> |
| <b>EPiServer platform .....</b>                        | <b>118</b> |
| Introduction .....                                     | 118        |
| Dashboard .....  | 119        |
| Gadgets .....  | 121        |
| Search .....   | 129        |
| Live Monitor .....                                     | 131        |

# Introduction

---

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

## About this documentation

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

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

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

## EPiServer help system

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

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



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

## Online community on EPiServer World

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

## Copyright notice

Copyright © 1996 – 2013 EPiServer AB. All rights reserved.

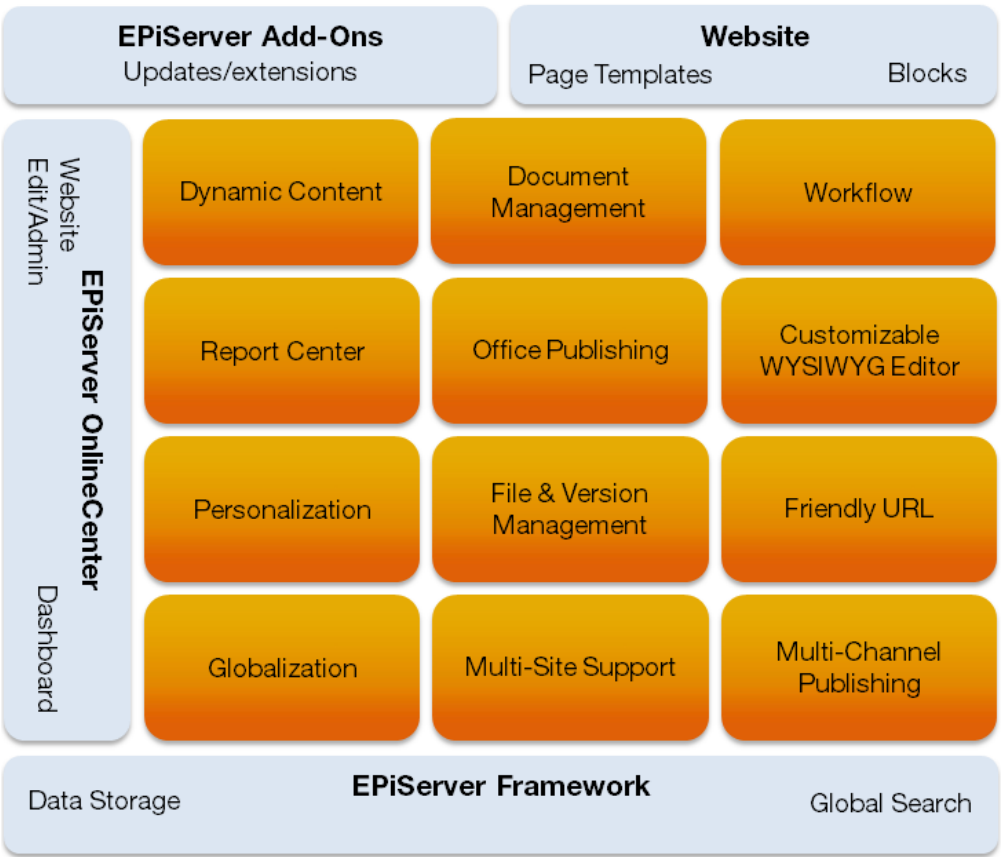
Changes to the contents, or partial copying of the contents, may not be done without permission. The document may be freely distributed in its entirety, either digitally or in printed format, to all users of EPiServer Software. We assume no liability or responsibility for any errors or omissions in the content of this document. We reserve the right to alter functionality and technical system requirements. EPiServer is a registered trademark of *EPiServer AB*.

# About EPiServer CMS

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

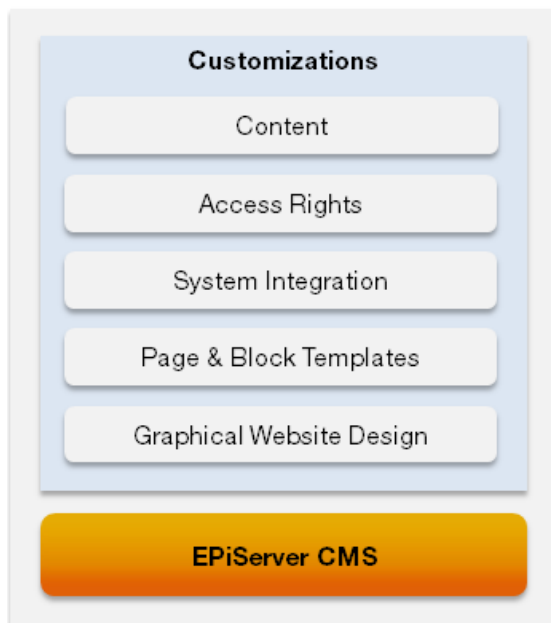
## The EPiServer CMS platform

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



## The customized website

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



Customizations typically include the following:

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

## Function overview

EPiServer CMS supports the following functions:

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

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

## Roles

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

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

## Work procedure for creating and displaying a web page

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





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

## Getting started

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

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

## Logging in

Access the EPiServer website as follows:

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



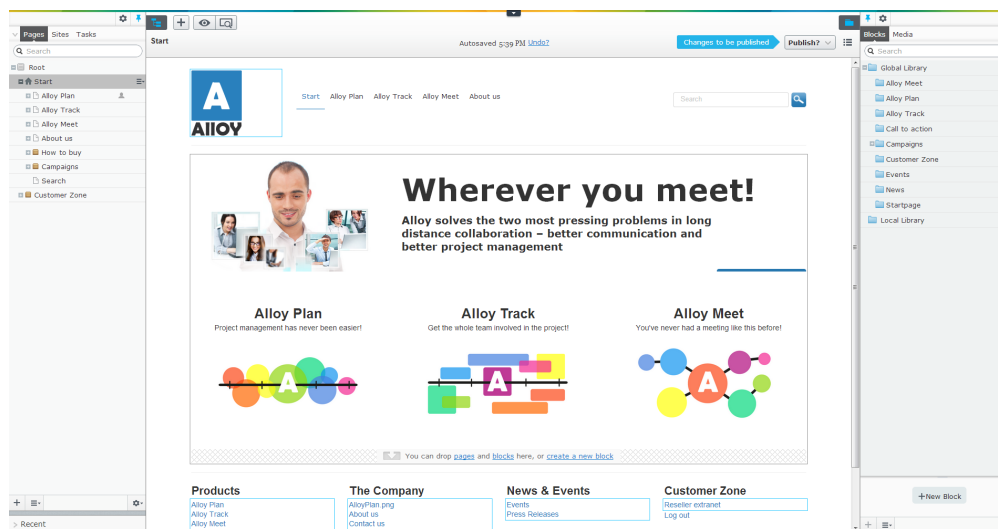
4. In the menu, select which interface you want to work with.
5. When logged in, use the **global menu** at the top to navigate to the different systems integrated with your website.



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



## Navigating from the global menu



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

- **Edit** is the **edit view** you are normally redirected to by default after login, where you can edit content for publishing.

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


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

## Generic functions, toolbar and panes

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

There are two ways of editing content in the user interface: Through the **on-page editing view** and the **all properties editing view**.

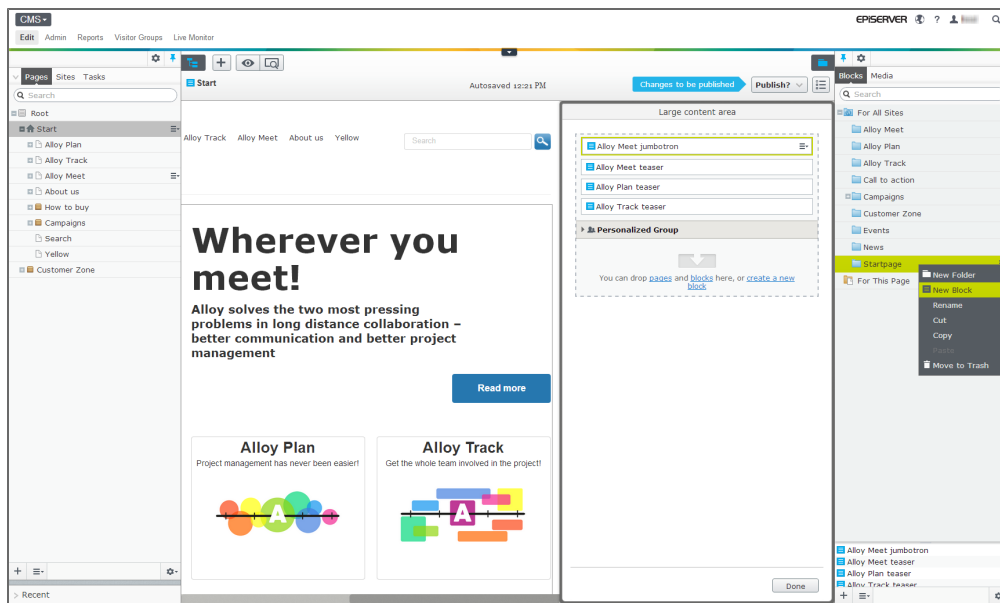
The following functions are commonly used in EPiServer products:

- **Context-sensitive actions.** You will only have access to the relevant actions in a context, for example, the preview option when editing a page. In addition, some options are only available if you have access rights, for example, publishing or removing content. The navigation pane supports common actions for pages in the tree structure, whereas the toolbar gives you access to the relevant actions in a specific context. For example, when you select a page to edit you are assumed to change the content as well as publishing the page. Therefore, only the buttons that are relevant for these functions are available.
- **Primary actions.** Some actions are opened in a new window, for example, to confirm that you want to move a page. The background appears dimmed, which means that you first must finish the action before you can continue. Another example is the publishing flow, where the bright color of the publishing button shows that it is the primary action.
- **Action feedback and notifications.** When you perform a successful action, for example, publishing a page, it is confirmed by a message.
-  Some status messages also require an action from you, where a symbol displays the number of status messages for the content, for example, to notify you to take action if the page contains any errors.
- **Tooltip.** You can view information about the page as a tooltip on mouse-over, for example, buttons, pages in the tree structure.
- **Drag-and-drop operations.** You can drag pages, blocks and media to the page you are working with, as well as a page from the tree structure to create a link on the page. See *Assets*.
- **Keyboard commands.** You can use the keyboard for common actions in a standardized way, such as performing actions in the page tree or formatting text in the rich-text editor. This documentation describes available commands on the EPiServer CMS sample site issued on PC or Mac. The following standard keyboard shortcuts are most commonly used commands in the user interface:
  - Ctrl+c or Cmd+c to copy, for example, to copy a page in the tree structure
  - Ctrl+x or Cmd+x to cut
  - Ctrl+v or Cmd+v to paste
  - Esc to close a dialog or pane
  - Delete or Cmd+Delete, for example, to remove a page in the tree structure
- **Customizable user interface.** You can drag the panes to the size you want, pin your settings, and add gadgets to the **dashboard** in EPiServer OnlineCenter, as well as the **navigation pane** and the **assets pane** for quick access.
- **Support for different time zones.** Depending on which function you are using, the system time mainly works in the following way:

- **Editorial interface.** When you are working with the content in the editorial interface, such as publishing and scheduling publishing, this is done in your local time zone.
- **Administrative interface.** When you want to run scheduled jobs in the administrative interface, this is done in server time. Mostly this is the same as your local time zone, but for websites with editors and administrators in several countries this time zone can be different from your local one. Contact your hosting supplier to find out what is applicable to your website.

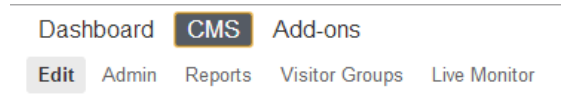
## On-page editing view

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



From **on-page editing view** you can access the following areas on the sample site:

- **Global menu** on the top is used for global navigation.



- **Toolbar** on the top contains the available tools for editing the content depending on which context you are working in.



On the toolbar you also have the following button for creating a new page and block:

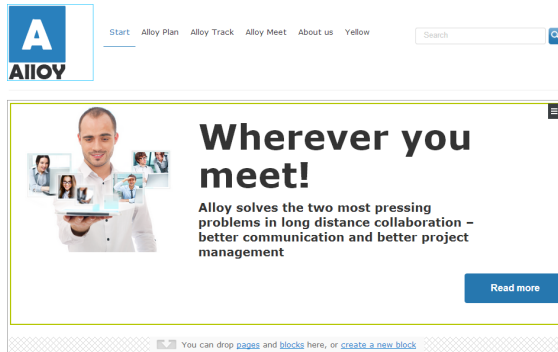
- **Add page** or **Add block**, see *Creating content*.



- **View options** and **Preview** are buttons to view the content in different ways, for example, language and resolution, see *Previewing*.

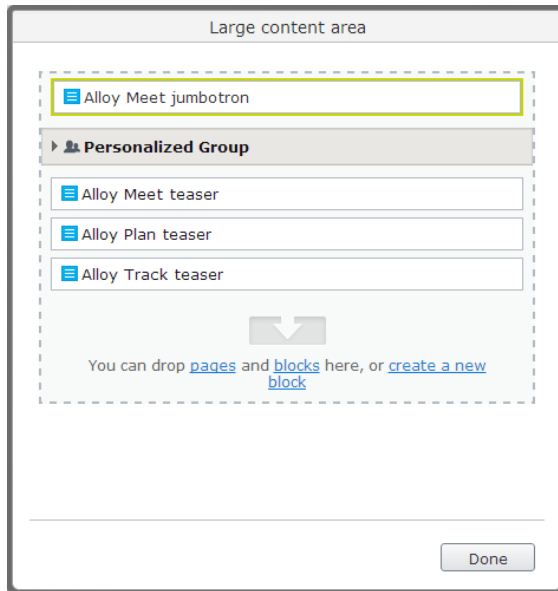


- **Content breadcrumbs** shows where in the tree structure the content is located on the toolbar. You can also click these breadcrumbs (links) to navigate on the website.
- **Content area** shows the current page, block or media item. It can also be a specific area on a web page for adding content through drag-and-drop operations, and editing content through the rich-text editor.



- **Navigation pane** to the left shows the pages of the website as a tree structure.
  - **Navigation pane button** opens the **navigation pane** to default width. You can then drag to expand the pane to the size you want, and pin it with the **pane pin** button.
- **Navigation pane tab bar** on the top has the tree structure on the **Pages** tab in EPiServer CMS and the **Products** tab in EPiServer Commerce, as well as the activated website languages on the **Sites** tab, and tasks on the **Tasks** tab.
- **Assets pane** to the right contains a folder structure with blocks, media and other tools for customization.
  - **Assets pane button** opens the **assets pane** to default width. You can then drag to expand the pane to the size you want, and pin it with the **pane pin** button.
- **Assets pane tab bar** on the top has the blocks library on the **Blocks** tab, and the media files library on the **Media** tab.
- **Flyout pane** is where you can edit the content of a particular property, for example, sort the order of block items or link items. When you are done with editing the content, click

**Done.** Your changes are automatically saved.



- **All properties button** opens the view where you can edit all properties for the content.

See *all properties editing view*.



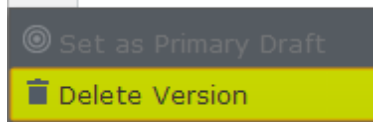
- **Pane settings** is where you can add gadgets to the pane, and change the order of them.



- **Pane pin** is used to pin the **navigation pane** and **assets pane**. If you have expanded the pane, pin to save your settings to the next time you log in to the website.



- **Notification bar** is used to show notifications, for example, how many pages that are using that particular content, or if content can be translated.
- **Autosave** saves all changes in the content automatically.
- **Actions menu** is a context-sensitive combo button on the toolbar with different publishing options that transforms depending of the content status and your access rights.
- **Content status** shows a short message, for example, if the content is ready to be published, or has been scheduled.
- **Context menu** shows the selectable options for a pane or gadget depending on which context you are in, for example, copy or move a page. These options are also available on mouse-over in the tree structure for pages, blocks, folders and media. See *Creating content*.



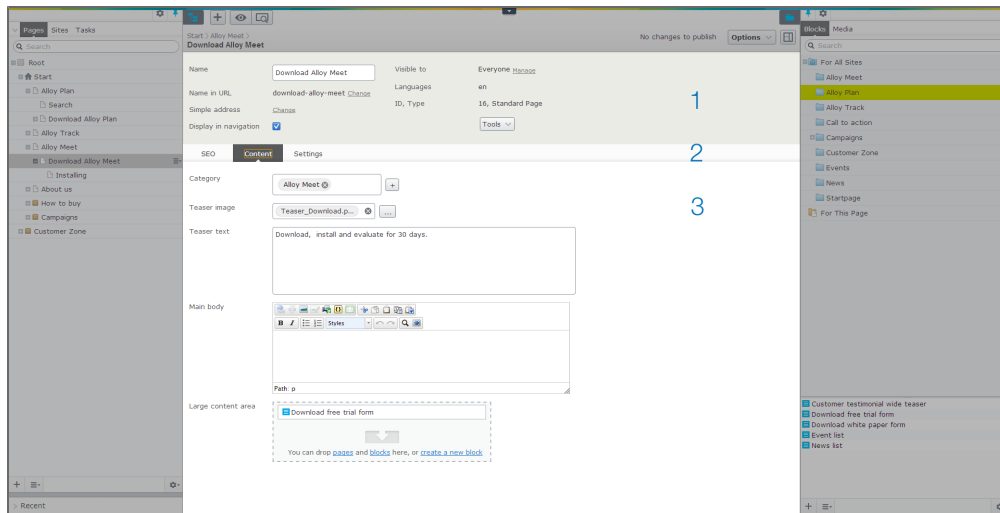
- **Gadget options.** Here you have the options to show content in other languages and move content to trash.



About how to use the on-page view for editing, see *Working in edit view*.

## All properties editing view

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



From **all properties editing view** you can access the following areas in a standard installation:

- **Page settings** or **Block settings** contains status and important properties (marked as 1 in the image).
- **Tab bar** contains the tabs for the particular content type, and can be set up by configuration (marked as 2 in the image).
- **Tab content** shows the properties for the tab you have selected (marked as 3 in the image).
- **On-page editing button** opens the view where you can edit the content directly on-page.




About how to use the all properties view for editing, see *Working in edit view*.

## Navigation pane

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

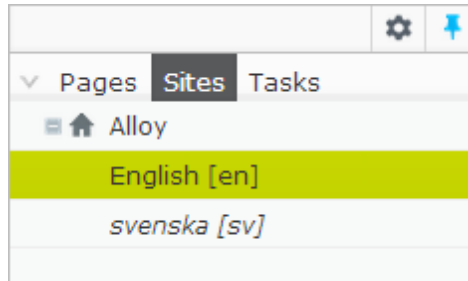
For a list of available gadgets and how to add them to the dashboard or panes, see *Managing gadgets*.

The navigation pane has the following tabs in a standard installation:

- **Pages.** Here you can navigate and change pages in the EPiServer CMS tree structure. If there are many pages on your website, you can search for a specific page by typing the page ID or a keyword in the search box (the page's name or its content). All pages that match the keyword will be listed, select the page you are looking for, or click  to clear your search and start over. To change the structure of the website by moving, copying and removing pages, see *Structuring the website*.



- **Sites.** Here you can work with your content in multiple languages. See *Globalizing content* and *Defining language settings*.



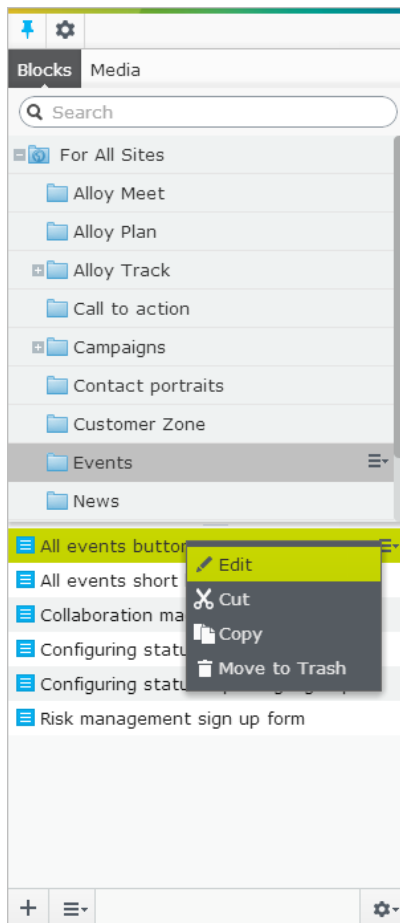
- **Tasks.** A task is a piece of information related to activities in EPiServer CMS, activities that usually require some kind of action. Tasks can be assigned either to an entire group of people or to single individuals. A typical example is a page that is set as **Ready to Publish** by an editor without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

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

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

## Assets pane

The **assets pane** contains a folder structure with blocks, media and other tools, which you can customize. You can drag the panes to the size you want, pin your settings, and add gadgets to the dashboard in EPiServer OnlineCenter and the panes for quick access.



The assets pane has the following tabs in a standard installation:

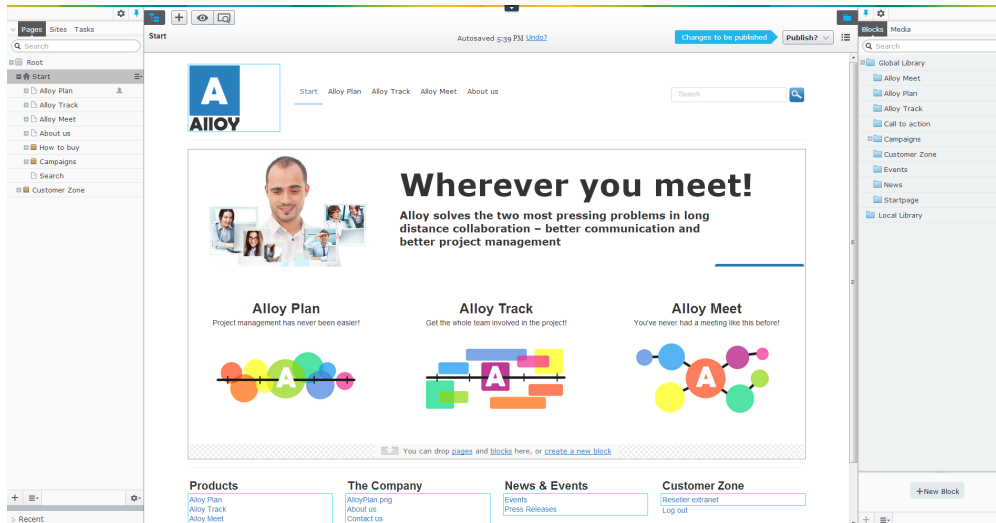
- **Blocks.** Here you can work with reusable content on your website, see *Managing blocks*.
- **Media.** Here you can work with images, video, documents and other assets on your website, see *Managing media*.

For a list of available gadgets and how to add them to the dashboard or panes, see *Managing gadgets*.

# Sample site and templates

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

Some of the templates support **responsive design** so that the size of the view changes according to the browser window of the device you are using. Developers can build responsive design support for the content on your website, see *EPiServer CMS SDK > Developer Guide*.

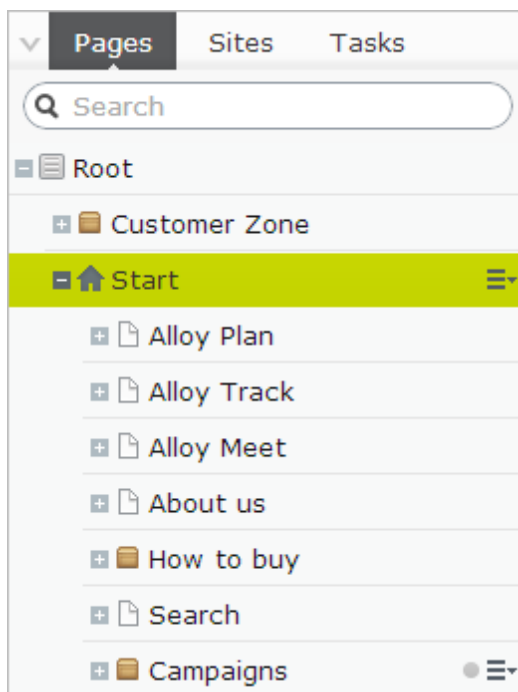


The sample templates are based on the responsive design concept, meaning that the content display will adapt to the device and resolution used when viewing the site. Content is managed as components through the use of blocks or pages which can be dropped in content areas for adapted display. Depending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

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

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

- **Start**, the “entrance” to the website with navigation and footer information.
- Product presentation sections for **Alloy Plan**, **Alloy Track** and **Alloy Meet**, with product pages.
- **About us**, information describing the company, with contact pages.
- **Search** is based on the search page type, containing functionality for search and display of search results.
- **Campaigns** is a container page with an example of a campaign page based on the landing page type.



**Note** Some pages will not have a display template for preview, since they are only used as **container pages**. Container pages have a special symbol in the page tree structure, see *Creating content*. Also, you cannot link to a container page.

## Sample pages and blocks

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

## Working in edit view

When you select content for editing, you have the following options on the toolbar:

**Options** ▾

**Publish?** ▾

**Options** or **Publish**. Click any of the following options that appear on the combo button:

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

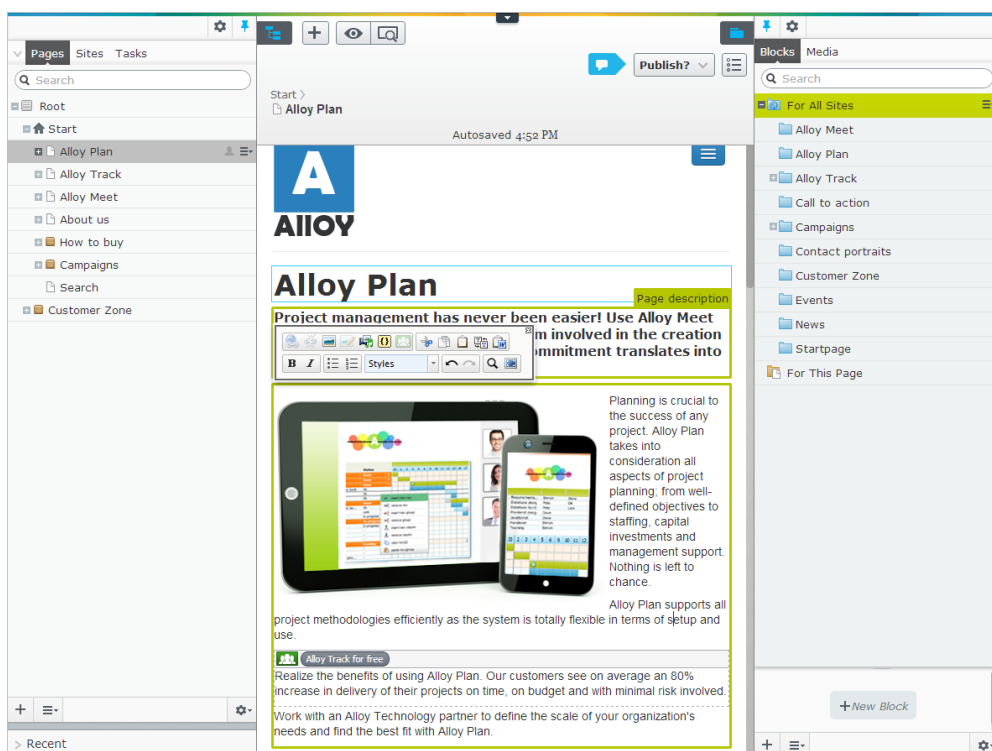


**Add content.** On the toolbar you have the combo button with options to create **New Block** or **New Page**. Name the item and select content type. For a new page, the draft will be created beneath the page you have selected. For a new block, you will be prompted to select block library. To create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



**All properties.** Click to access all properties for editing the content. Default is on-page editing view.

## Editing directly on a page



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

Edit an existing page as follows:

1. Select the page you want to edit from the tree structure in the navigation pane. You can edit the highlighted content areas.
2. Move the mouse pointer over the piece of content you want to edit, and click it. The property names will be displayed on mouse-over, except for the content area.
3. Make your changes. Copy text from other programs and format text, see *Using the rich-text editor*. You can also create a block which is a piece of information, for instance a banner or a news listing, which can be inserted into the page you are editing. Blocks are useful when you want to reuse and share information components on your website. See *Blocks* for more information on how to create blocks.
4. When you are done, click **Done**. Your changes are automatically saved, and a new page version will be created.
5. When you are done, publish the page in any of the ways as described in *Saving and publishing content*. You also have options to undo and redo your changes.

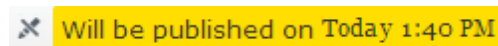
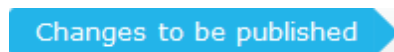
To change the structure of the website by moving, copying and removing pages, see *Structuring the website*.



**Tip** You can see the page settings in on-page editing view when scrolling the mouse wheel.

## Content status on the toolbar

When you are editing content in full width, you will see status information in full text on the toolbar as shown in the following examples:

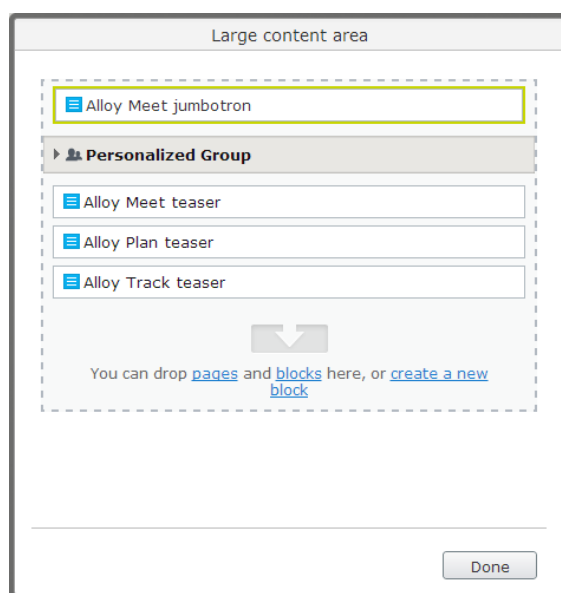


The symbol of the pen ✎ means that the content is not available for editing until you cancel the settings, for example, a scheduled publishing.

When the navigation pane and assets pane are pinned, the toolbar shows the following status symbols of the content:

|  |  |
|--|--|
|  | A page or a block that has been published will be in <b>Published Version</b> status and no status symbol is shown.  |
|  | A page or a block that has been set to <b>Ready to Publish</b> will be in <b>Ready to Publish</b> status.  |
|  | A new page or a block that has not yet been published or set to ready to publish, will be in <b>Not Ready</b> status.  |
|  | A published page or a block that has been changed but not yet published, will be in <b>Not Ready</b> status. It could also have been set to <b>Ready to Publish</b> , if it was not approved it will be in <b>Rejected</b> status. |
|  | A page or a block that has been scheduled for publishing: <ul style="list-style-type: none"> <li>• New will be in <b>Published</b> status</li> <li>• Changed will be in <b>Delayed Publish</b> status</li> </ul>                   |

## Editing content in the flyout pane



In the flyout pane you can drag pages and blocks and drop them in the content area. You can also *create a new block* and sort the items through drag and drop. Click **Done** and your changes are saved. Pressing Esc closes the pane without your changes were saved.

## Editing all properties

Your content can have metadata and other non-visible properties. In the **All Properties** view you can access all these properties for editing. On the EPiServer CMS sample site a set of tabs is already set up for each content type, but this may be different for the templates used on your website. Contact your system administrator to find out what is applicable to your website.

Please refer to the product-specific description about how to edit all properties.

You have the following options:



**All properties.** Click to access all properties for editing the content. Default is on-page editing view.



Click to add, for example, a category.



Click to browse, for example, a form.



Click to remove, for example, a category.

## Previewing

See the different view options as described in *Previewing*.

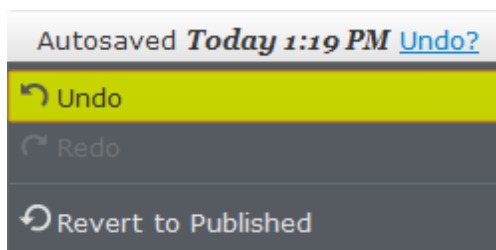
## Saving and publishing content

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

You can either create a new page or edit an existing page for publishing as described in *Working in edit view* and *Creating content*.

Whenever you start working on a page after it has been saved, you will get a “draft version”. For version management of blocks, media and pages, see *Managing versions*.

## Using autosave



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

- **Undo** to discard your changes on the content you are editing. If you are editing with the fly-out pane open, click **Done** and then **Undo**.
- **Redo** if you discarded your changes through **Undo** and want to take them back again.
- **Revert to Published** to take back the latest published version.

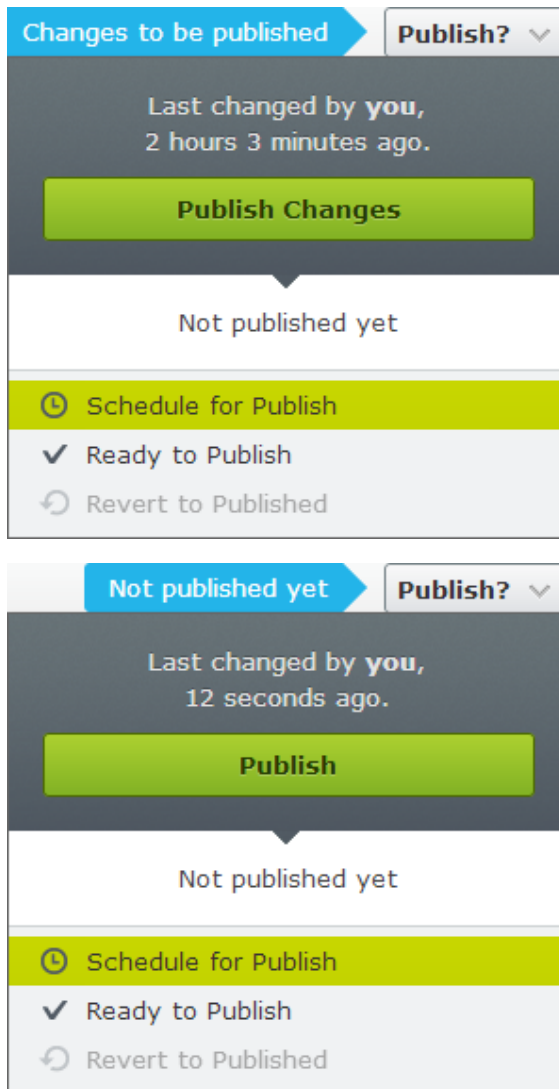
If there are several editors working on the same content, you will work with a shared draft by default, meaning that your changes are saved in the same version, see *Editing a shared draft version*. You can also create a new version.

## Publishing a page

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

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



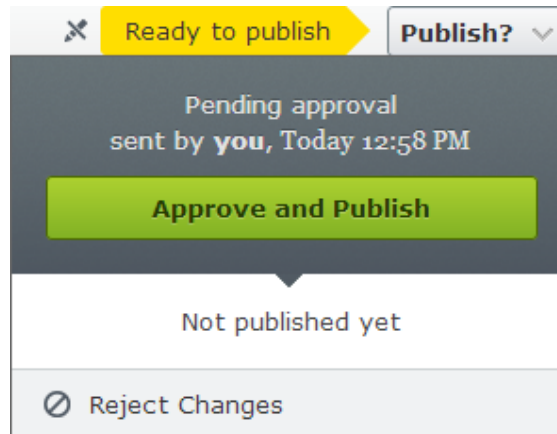


Under the publishing button you can see information about when and by whom the page was last changed and saved. Clicking **View on website** will take you to view the current published page as your visitors see it.

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

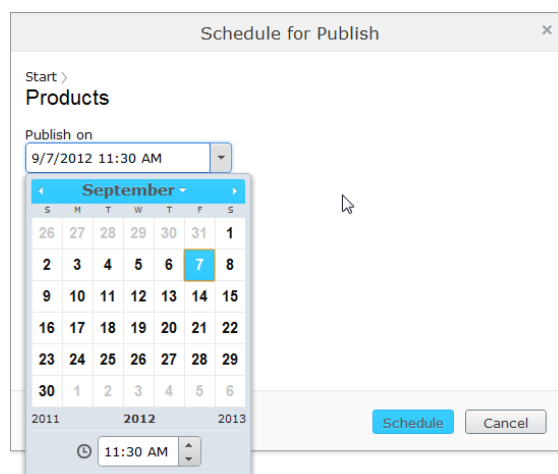
- **Publish.** To use this option you need to have access rights for publishing of pages. When you are done and select **Publish**, the button disappears and your changes are immediately visible to visitors. Successful publishing is confirmed by an action feedback and the page is set to **Published**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

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



- **Schedule for Publish.** You can schedule publishing of a page you have just created as well as an existing page you have made changes on. Selecting this option opens a window where you select a date for the publishing of the page to start. Click **Schedule for Publish** to apply your scheduled publishing, or select **Remove Scheduling and Edit** to continue editing. When you schedule a new page, the symbol of a clock ⌚ will appear in the tree structure.

Normally, pages are continuously updated and never expires, but you can set a date for the publishing to stop, see *Setting a stop date*.



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

- **Revert to Published.** You can discard your changes of the page you are editing and take back the latest published version.
- **Republish.** You can select a previously published page version from the **Versions** gadget and publish it again by clicking **Republish**.



**Tip** You can schedule several versions of pages and blocks for publishing, for example, in a scenario of managing multiple campaigns and scheduling multiple banner adverts on a landing page. Use **New Draft from Here** to create another version for scheduling.



**Note** If two users try to work with the same page simultaneously, the system will display a warning informing that your changes might be overwritten. To avoid version conflicts, you can use the feature **Permanently Mark as being Edited** in the all properties editing view.

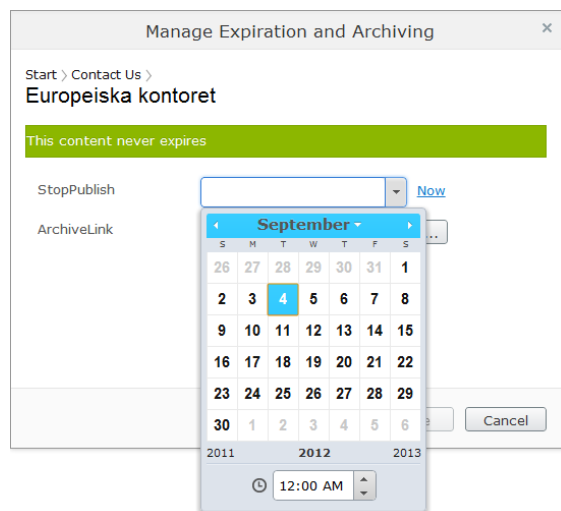


**Note** If you try to copy and paste content in the tree structure where you do not have access rights for publishing, then the pasted content will be created in a draft version.

## Setting a stop date

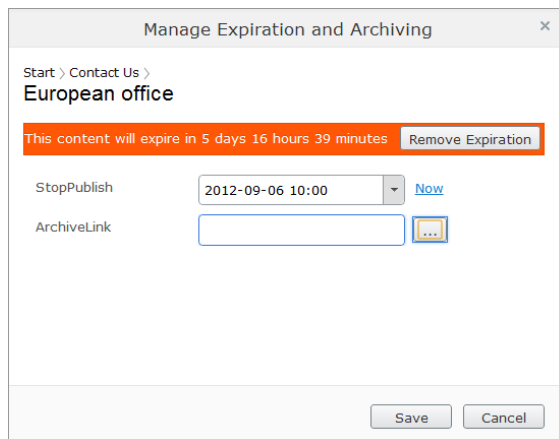
You can select a specific date and time for the content to not be visible to the visitors anymore. This is done from the all properties editing view.

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



3. Confirm that you want the content to stop being published by clicking **Save**, or discard your changes by clicking **Remove Expiration**. When you set a page to stop being pub-

lished, the symbol of a clock 🕒 will appear in the tree structure.



The screenshot shows a dialog box titled "Manage Expiration and Archiving" with a close button (X) in the top right corner. The breadcrumb path "Start > Contact Us > European office" is displayed. Below the path, a red bar contains the text "This content will expire in 5 days 16 hours 39 minutes" and a "Remove Expiration" button. The "StopPublish" section features a date-time picker set to "2012-09-06 10:00" and a "Now" link. The "ArchiveLink" section has an empty text input field and a button with three dots. At the bottom, there are "Save" and "Cancel" buttons.

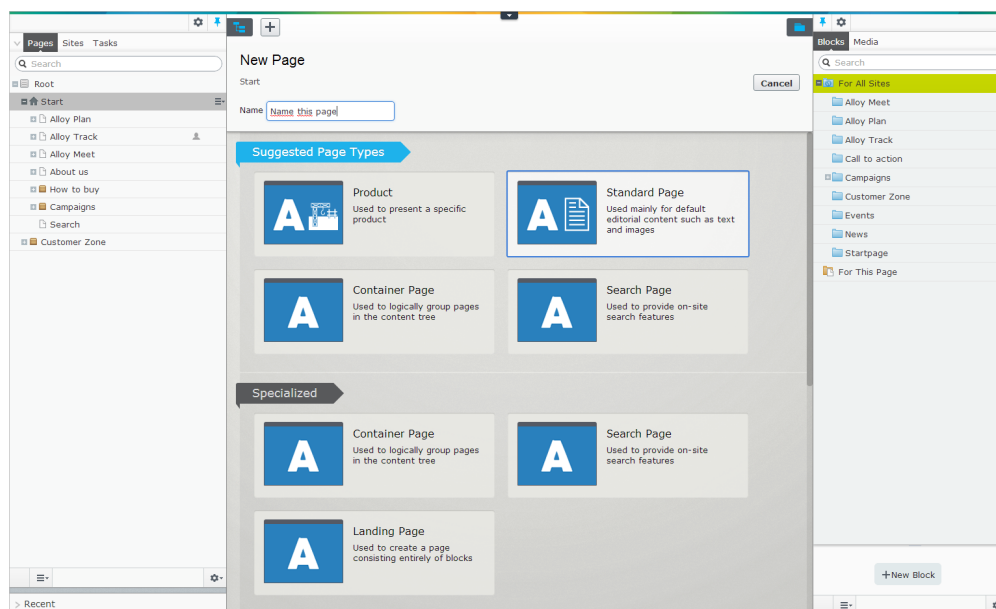
Instead of stop publishing, you can remove the content from the website as described in *Moving, copying and removing content*, or delete permanently as described in *Handling content in trash*.

# Creating content

Content can be for instance pages or blocks in CMS, or catalog entries in Commerce. In the following we will describe how to create various types of content in EPiServer.

## Creating pages

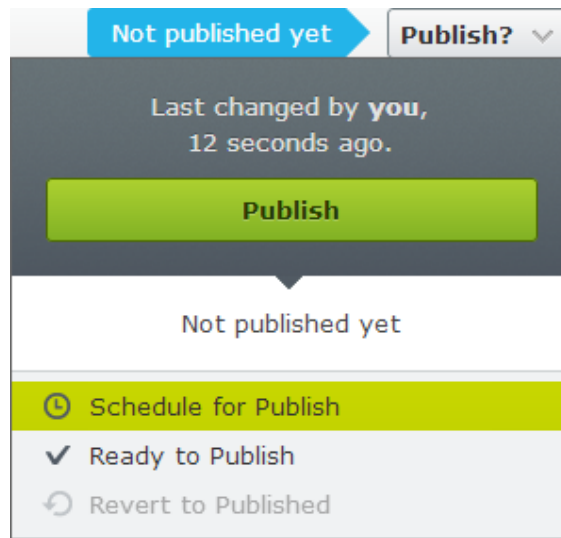
When you create a page in CMS, you need to select a page type. Depending on your access rights, all possible page types that are available for selection under a particular node are listed in groups. The most common page types are listed under the **Suggested Page Types** group by default, but your organization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



In this example we will create a page based on the page type **Standard page** on the sample site:

1. Select the page in the tree structure where you want the new page. The new page will be created under the page you have selected.
2. From the context menu in the navigation pane or the add button on the toolbar, select **New Page**.
3. In **Page name**, name the page otherwise it will be named "New Page" by default. The page name will be shown in the tree structure and in the menus.
4. Move the mouse pointer to highlight a page type. The page types are grouped together suggesting the most commonly used. Select the page type **Standard page**.
5. Start editing directly on the page. The **Main body** and **Secondary body** sections are highlighted editable areas in which you write the information. Toggle *all properties editing* to format the text, load images, create links and work with tables in the *rich-text editor*. The text in **Main body** will be displayed in the middle of the page and the text in **Secondary body** will be shown in the right column of the page.
6. *Preview* with several options, such as media channels. Your changes are automatically saved. You can continue to work with the page.

7. When you are done, click **Publish** to make the page accessible to visitors and appear in the menus. Or, send the page for review by clicking **Ready to Publish**.

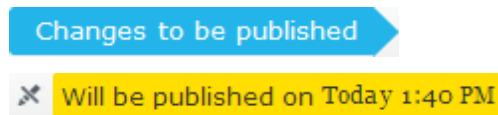



For a description of saving and publishing options, as well as options for undo and redo changes, see *Saving and publishing content*.

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






## Content status on the toolbar

When you are editing content in full width, you will see status information in full text on the toolbar as shown in the following examples:



The symbol of the pen  means that the content is not available for editing until you cancel the settings, for example, a scheduled publishing.

When the navigation pane and assets pane are pinned, the toolbar shows the following status symbols of the content:

- |   |  |
|---|--|
|  | A page or a block that has been published will be in <b>Published Version</b> status and no status symbol is shown.  |
|  | A page or a block that has been set to <b>Ready to Publish</b> will be in <b>Ready to Publish</b> status.  |
|  | A new page or a block that has not yet been published or set to ready to publish, will be in <b>Not Ready</b> status.  |
|  | A published page or a block that has been changed but not yet published, will be in <b>Not Ready</b> status. It could also have been set to <b>Ready to Publish</b> , if it was not approved it will be in <b>Rejected</b> status. |
|  | A page or a block that has been scheduled for publishing: <ul style="list-style-type: none"> <li>• New will be in <b>Published</b> status</li> <li>• Changed will be in <b>Delayed Publish</b> status</li> </ul>                   |

## Creating blocks

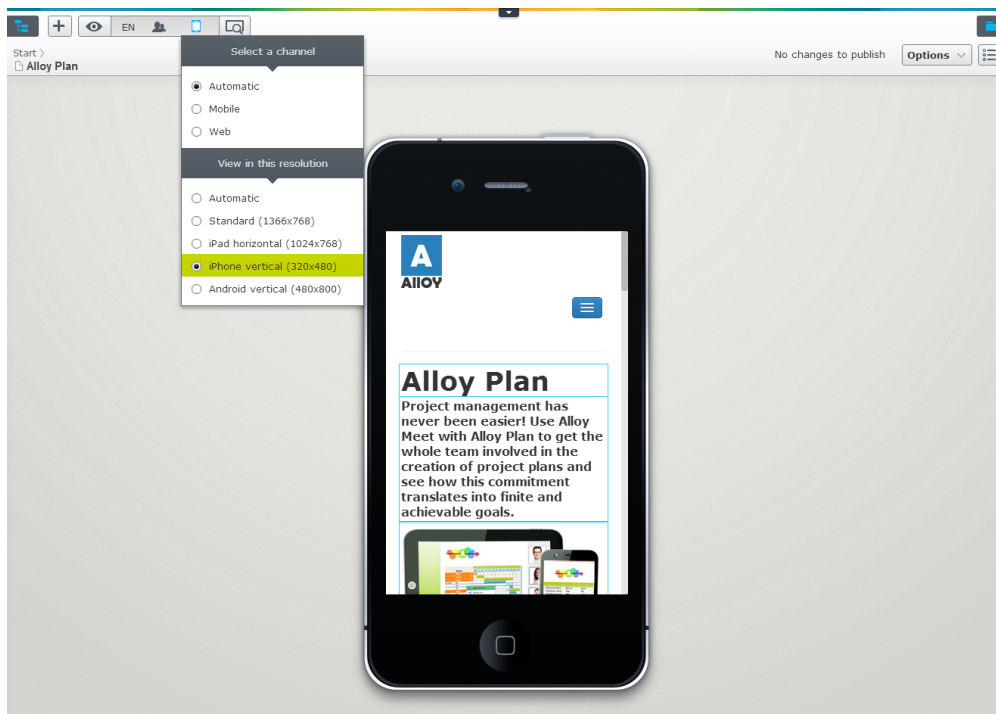
You can also create a block which is a piece of information, for instance a banner or a news listing, which can be inserted into the page you are editing. Blocks are useful when you want to reuse and share information components on your website. See *Blocks* for more information on how to create blocks.

## Creating content based on other content types

Content can be for instance catalog entries such as products and variants in EPiServer Commerce. The creation of this type of content is similar to the creation of pages and blocks in CMS. Content can also be media files such as images and documents managed from the **Media** tab in the Assets pane, see *Assets – using shared content*.

## Previewing

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



You have the following options to preview the content:



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



**View settings.** Click the eye symbol and select to preview the content in any of the following view settings:

- **Languages.** When the view settings menu is open, you can view the page content in the current language. If other languages are activated in the editorial interface on the website, you can select any of these in the drop-down menu and translate the content as described in *Globalizing content*.
- **Visitor groups.** You can view the page content as the visitor groups you have created for the website see it as described in *Personalizing content*.
- **Media channels.** Select to view the content as displayed for the preset on the EPiServer CMS sample site: **Automatic**, **Mobile** and **Web**. Then select the configured resolution, for example, a large screen or smart phone.

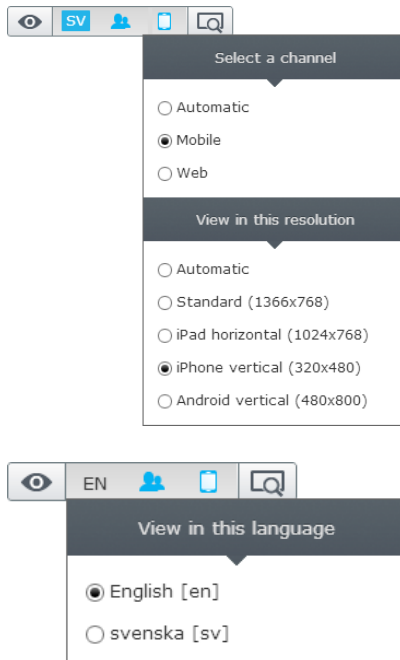


**Tip** You can combine toggling **Preview** and **View settings**.

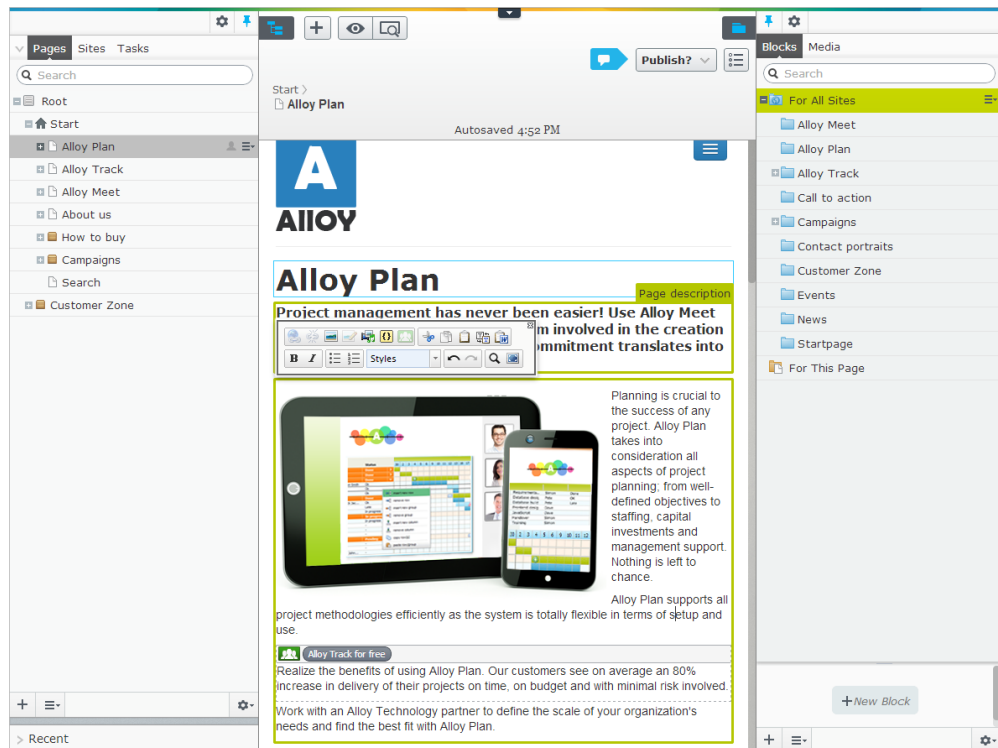
The preview settings for the presets are “sticky”, meaning that when selecting any of the settings you can browse several pages and keep that setting activated. You will also keep the preview setting when editing the page directly on the page, but if you switch over to *all properties editing view* as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



Depending on how the website is configured, the presets can look as shown in the following examples of the sample site:










## Using the rich-text editor
















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

EPiServer CMS comes with a limited selection of editor functions (buttons) that are normally activated on the sample site. Your system administrator can define which buttons to be available in the editor by activating or deactivating them in EPiServer CMS admin view.

The following buttons are available in EPiServer CMS:

|   |                                 |   |
|---|---------------------------------|---|
|  | Insert and edit link            | Display the link dialog box for insertion or editing of link. It appears dimmed until you select the text to be included in the hyperlink. See <i>Creating links</i> .  |
|  | Remove link                     | Remove a link from the selected text. It is dimmed until you place the cursor in the hyperlink.   |
|  | Insert image                    | Insert an image in the editor area of your page, and change image properties. See <i>Adding and editing images</i> .  |
|  | Edit image                      | Edit an image on your page.   |
|  | Insert and edit embedded media  | Insert media content such as video into the editor area of your page. See <i>Inserting embedded media</i> .   |
|  | Insert and 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. |
|  | Insert personalized content     | Insert or edit personalized content. It is dimmed until you select the text to be included in the personalized content. See <i>Adding personalizing content</i> .   |

|   |                                 |  |
|---|---------------------------------|--|
|    | 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 as plain text from the clipboard to the editor area of your page.  |
|    | Toggle paste as rich/plain text | Toggle paste content to the editor area of your page as rich text or plain text. See <i>Copying text from other programs</i> .   |
|    | Paste from Word                 | Paste content into the editor area of your page with any word formatting of content cleaned up.  |
|    | Bold<br>Italic                  | Select single words in the text to format it with bold or italic. You can remove all formatting by selecting the text and then select a style in the <b>Styles</b> drop-down list. |
|    | Unordered list                  | Place the cursor to create a bullet list of the text.  |
|    | Ordered list                    | Place the cursor to create a numbered list of the text.  |
|    | Styles                          | Displays a drop-down list with available style formats for formatting text (which reflects the CSS style sheets on the website).   |
|    | Undo<br>Redo                    | Undo or redo of previous actions.  |
|    | Show HTML source                | Display the HTML code. You can switch to HTML mode and check the code and make adjustments to the page.  |
|    | Toggle full screen mode         | Toggle full screen and normal screen mode when working with large volumes of text and images. Click the button again to restore the editor area to its original size.              |
|  | Find                            | Search for and replace a text within the editor area of your page.   |

The rich-text editor in EPiServer also has the following supported functions:

- **Drag-and-drop support.** You can drag and drop blocks into the editor area as described in *Assets – Using shared content*, as well as links as described in *Creating links*.
- **Path and word count.** When you click a piece of text in the editor area while editing it, the HTML tag for the text will be displayed in the **Path:** section at the bottom left part. For instance, if you have formatted the text with bold, the **Path:** section will display "Path: p >> strong". This is useful to check that the text is correctly formatted. In the bottom right corner of the editor area, the **Words:** field displays the actual word count for the content. This function can be turned off from the administrative interface of EPiServer CMS.
- **Spell checking.** Spell checking is available as an optional add-on in the Add-on Store. To be able to use this feature, your system administrator must install the add-on as described in the EPiServer platform documentation. Spell checking can also be done by using the built-in function of the web browser: Open the text you want to spell check for editing. Place the cursor in the text and select spell check on right-click. Follow the options available in the browser.

## Creating links

When you edit a page or block, you can link to another content, this can be external assets and content on the website. About how to insert pages and blocks on a page, see *Assets – Using Shared Content on a Page*.

In EPiServer CMS you can work with links mainly in the following ways:

- **Link collection** is an area (property type) that has been defined in the content type, where you can add and edit a group of links, for example, see the footer on the start page on the sample site. It is a quick way to add and rearrange links to pages and media on the website through drag and drop, and works in a similar way as for a standard content area.
- **Rich-text editor** is a way to create links on all content types containing a rich-text editor area, and that might not have a link collection area. To insert links using the rich-text editor, see the following sections:
  - *Content on the website*
  - *Documents*
  - *E-mail addresses*
  - *Images*
  - *Anchors to specific sections on a web page*



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

## Linking to content using a link collection area

To link to pages, blocks and media, you can drag and drop it to a link collection area. In the dialog you can also create links by entering e-mail and external source, such as a document on another website.

## Creating and editing a link collection

Create and edit the link collection as follows:

1. Select the page where you have the link collection.
2. Click one of the highlighted areas with links on the page.

### The Company

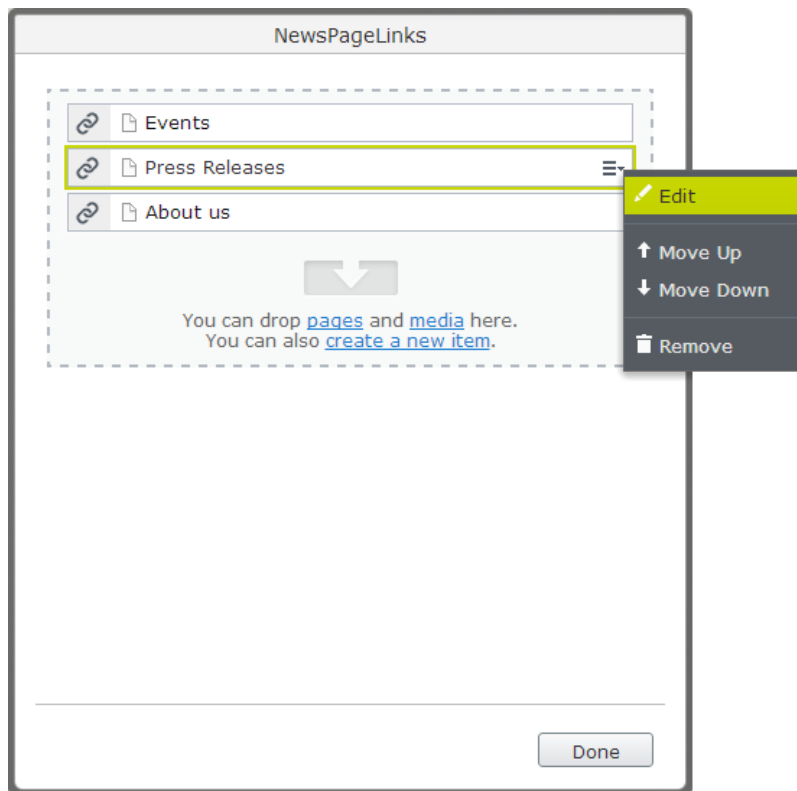
About us  
News & Events  
Management  
Contact us  
Become a reseller

### News & Events

Events  
Press Releases

3. When the flyout pane appears, you can drag a page or media item (image, document, video) to the link collection area, or clicking **Create a new link**.

4. You can rearrange the links by moving and removing them through drag and drop in the flyout pane, or using the context menu.




5. Select **Edit** in the context menu to edit the link settings. The content name will be displayed in the link, but you can rename it if you want. Here you can also change other settings, for example, selecting that the page should open in a new window or selecting

another link type “E-mail” and entering an e-mail address instead. Click **OK**.

- When you are done, publish the page in any of the ways as described in *Saving and publishing content*.

### Deleting a link in the collection

Clicking the **Delete** button will remove the link. You can also remove content on the website by clicking .

### Linking to content using the rich-text editor

To add and edit links to pages, media, e-mail or external links, you can use the following buttons in the *rich-text editor* toolbar:



Insert and 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.



Remove link

Remove a link from the selected text. It is dimmed until you place the cursor in the hyperlink.

### Linking to a page

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

#### Linking to a page on your website through drag and drop

Create a link to a web page on your website by drag and drop as follows:

- Open the page in the editor area to which you want to insert the link.
- You have the following options to create a link:
  - Drag the page from the tree structure to your page in the editor area and drop it. The page name will form the link.

- Select a piece of content (an image or a text) in the editor area that you want to act as the link, and drag the page from the tree structure and drop it over the selected content in the editor area.
3. When you are done, publish your changes.



**Tip** Another way to link to your content is to use drag and drop pages and blocks as described in *Assets – Using shared content on a page*. This kind of content can contain links to pages on your website.

## Linking to a page on your website

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

1. Select the text that will form the link.
2. Select **Insert/edit link**.
3. In **Title**, type the text that will be shown as a tooltip to the link.
4. In **Open in**, select how the link is to be opened. If nothing is selected here, the link will open in the same window.
5. Select **Pages**, browse the page you want to link to in the tree structure, click **OK**.
6. 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.
7. Click **OK**.



**Tip** 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 page on another website

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

1. Select the text that will form the link.
2. Select **Insert/edit link**.
3. In **Title**, type the text that will be shown as a tooltip to the link.
4. In **Open in**, select how the link is to be opened. For external links, it is recommended that you open the page in a new window.
5. Select **External link** and enter the web address (URL) you want to link to, an external website, page or document. Valid external links contain the prefix http, https, ftp and file, for example, <http://externaldomain.com>.
6. Click **OK**.

## Linking to a media file

You can create links to media and documents on the website, which are available on the **Media** tab in the assets pane. You can also link to media and documents on a file server or on another website. You can link to any type of document formats.

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

### Linking to a document on your website through drag and drop

Create a link to a document by dragging and dropping it directly from the **Media** tab to a content area as follows:

1. Open the page and select the document you want to insert, drag it from the media library and drop it in the editor area of the page. The document file name will form the link text, you can change this later if you want.
2. To change the link properties, select the link and click the **Insert/edit link** button in the editor toolbar, click **OK**.

### Linking to a document on your website

Create a link to a document on your website from the **Media** tab as follows:

1. Select the text that will form the link.
2. Select **Insert/edit link**.
3. In **Title**, type the text that will be shown as a tooltip to the link.
4. In **Open in**, select how the link is to be opened.
5. Select **Media**, browse the page you want to link to in the folder structure, click **OK**.

### Linking to a document on a file server

Create a link to a document file server (for example, on the local network) using the rich-text editor as follows:

1. Select the text that will form the link.
2. Select **Insert/edit link**.
3. In **Title**, type the text that will be shown as a tooltip to the link.
4. In **Open in**, select how the link is to be opened.
5. Select **Media** and enter the path to the file you want to link to. Enter the complete path with the computer name, and the entire folder path ending with the file name, including the file extension.
6. Click **OK**.

### Linking to a document on another website

Create a link to a document on another website as described in *Linking to a page on another website*.

### Linking to an e-mail address

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

Create a link to e-mail address as follows:



1. Select the words that will form the link.
2. Select **Insert/edit link**.
3. In **Title**, type the text that will be shown as a tooltip to the link.
4. Select **E-mail**, enter the e-mail address and click **OK**. The “mailto:” prefix will be added automatically.

### Creating a link from an image

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

1. Select the image that you want to create a link to.
2. Select **Insert/edit link**. Depending on the type of link you want to create, select the appropriate tab **Pages**, **Media** or **E-mail**.
3. In **Title**, enter the text that will be shown as a tooltip to the link.
4. In **Open in**, select how the link is to be opened. For external links, it is recommended that you open the page in a new window.
5. Select **OK**.


### Creating an anchor

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

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


#### Step 1: Inserting an anchor

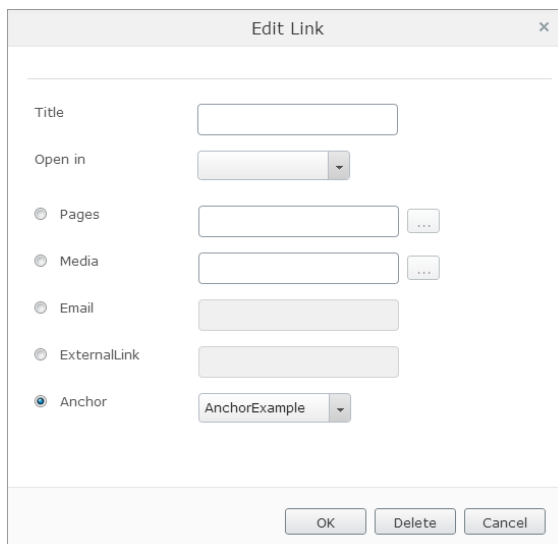
Insert an anchor on the page as follows:

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

#### Step 2: Adding a link to anchor

Create a link to an anchor as follows:

1. Select the text that will form the link.
2. Select **Insert/edit link** .



3. In **Title**, type the text that will be shown as a tooltip to the link.
4. In **Open in**, select how the link is to be opened.
5. Select **Anchor** and the anchor item you want to link to (all the anchors on the page are listed).
6. Click **OK**.

### Changing an anchor

Change the anchor as follows:

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

### Removing an anchor

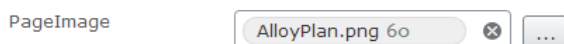
Remove the anchor as follows:

1. Select the anchor you want to remove.
2. Press Delete or Cmd+Delete on your keyboard.
3. Update links that are pointing to the anchor that has been removed.

### Using other link types

In case the page type does not have the link collection property or the rich-text editor, it might contain the URL property. This property is only available in the ***all properties editing view***.

The following example shows a property that only can contain an image:



## Formatting text

When you edit text in the rich-text editor, you want it to look in a conform style on the website irrespective of whether you are copying the text from a Word file or writing it from a blank page. Always use predefined formats in the CSS files to give the website a consistent look and feel, as well as for accessibility and search optimization reasons.

### Copying text from other programs

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



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



**Paste from Word** will keep the formatting from the Word document. To transform the text formatting from Word into the website's style, for a successful result the headings and body text must be properly formatted using the available template styles in Word. When you copy text from Word and paste it into an page, for example, a "heading 2" in Word will be converted into the "heading 2".



**Tip Publishing from Office** is available as an optional add-on in the Add-on Store. To be able to use this feature, your system administrator must install the add-on as described in the EPiServer platform documentation.

### Toggling paste as rich or plain text

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

1. Select and copy the text in the program you want to copy from.
2. Select the page for editing.
3. Click the **Toggle paste as rich/plain text** button on the editor toolbar.
4. Use keys Ctrl+v or Cmd+v to paste the text.
5. Use the predefined styles to format the text.

### Pasting text from Word

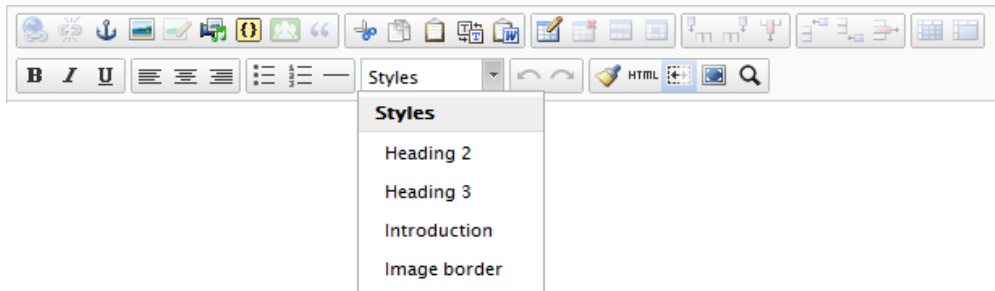
Paste text with the **Paste from Word** option as follows:

1. Select and copy the text in the program you want to copy from.
2. Select the page for editing.
3. Click the **Paste from Word** button on the editor toolbar.
4. Use keys Ctrl+v or Cmd+v to paste the content into the **Paste from Word** window.
5. Click **Insert** to insert the content into the page.
6. Use the predefined styles to format the text.

## Formatting text

You can find the available formats in the **Styles** drop-down list on the editor toolbar, by applying CSS classes that are predefined for your website. In this way the correct HTML tags will be applied to your content. To set the style of the content on your website (headings, body text, and

more), select the piece of content to be formatted and then the format you want in the drop-down list. For example, when you format a text with "Heading 2", these headings will have a uniform appearance all over the site.



This list can be extended to also contain different classes. 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.

You can emphasize single words in the text in bold, underlined or italic style by using the toolbar buttons, assuming that these buttons has been activated through the administrative interface.

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

### Using keyboard shortcuts

Use the following standard keyboard shortcuts to quickly carry out formatting in the rich-text editor:

| Command         | Shortcut keys       | Description   |
|-----------------|---------------------|---|
| Select all      | Ctrl+a or Cmd+a     | Press to select all text and images in the rich-text editor. Useful if you want to cut or copy the content.   |
| Undo            | Ctrl+z or Cmd+z     |   |
| Redo            | Ctrl+y or Cmd+z     |   |
| Bold            | Ctrl+b or Cmd+b     |   |
| Italic          | Ctrl+i or Cmd+i     |   |
| Underline       | Ctrl+u or Cmd+u     |   |
| Copy            | Ctrl+c or Cmd+c     |   |
| Cut             | Ctrl+x or Cmd+x     |   |
| Paste           | Ctrl+v or Cmd+v     | Do not paste the text using Ctrl+v directly in the editor area, as this will paste it in with the format it had in the source program.  |
| H1–H6 headings  | Ctrl+1–6 or Cmd 1–6 |   |
| Paragraph break | Enter or Control+o  | Press to get a <b>paragraph break</b> , 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      | Shift+Enter         | Press to get a <b>line break</b> , which provides   |

| Command | Shortcut keys | Description  |
|---------|---------------|--|
|         |               | none additional space between the lines. A line break will generate a <br> tag in the HTML code on your web page. It is better to use the paragraph break instead. |



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

## Adding and editing images

Unlike many other computer applications, a web page does not embed images. Instead, it uses a link to the image and location in the media library where the image is stored. To display images in content they must be available in the media library on the **Media** tab.

The **Image Editor** in EPiServer provides basic image editing features such as cropping, resizing and transforming. The edited image file can either be saved as a copy, or replace the original file.

You can access the image editor in the following ways:

- From the **Media** tab in the assets pane.
- From the rich-text editor. Here you can also edit the image properties, for example, apply a CSS class to the image.

In the rich-text editor, you can work with the following image editing tools:



Click to insert or edit an image for the content, or to change image properties.



Click to access the image editor to change the image file.

### Adding an image through drag and drop


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

1. Edit the page, and select the **Media** tab.
2. Select the image you want and drag it where you want it on the page.



### Adding an image through the rich-text editor

Insert an image into a page as follows:

1. Place the cursor in the editor area of your page where you want to insert your image.
2. Click the **Insert/edit image** button  on the editor toolbar.
3. In **Image description**, type a description of the image.
4. In **Title**, type a title for the image to be displayed when the mouse pointer is moved over the image.

5. In the **Media** window, select the image in the tree structure. Insert the image by clicking **OK**.
6. Click **Insert** and the image will be linked to the page.




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

### Editing an image through the rich-text editor

The easiest way to edit an image through cropping, resizing and transforming is on the **Media** tab, but you can also use the rich-text editor, see *Managing media*. There you can also remove or replace an image in the media library.

Edit the image as follows:


1. Select the image on the page you want to change.
2. Click the **Image Editor** button  on the editor toolbar and make the changes to the image.
3. When you are done, save the image as a copy or replace the original file.



**Tip** You should always try to have as small file size for images as possible on web content to avoid long downloading times. Therefore compress the image to a smaller file size by cropping or resizing it. Web pages often have a limit for how wide the images can be (usually around 500–600 pixels), check this with your system administrator. For cropping and resizing images it is also possible to select predefined sizes from the **Preset** list, defined by the system administrator in the **web.config** file of your website.

### Changing image properties

Change the way an image appears by changing its properties as follows:

1. Select the image you want to change in the editor area.
2. Click **Insert/edit image** button  on the editor toolbar.
3. On the **General** tab, you can change the **Title** and **Image description**. Click **Update** to save your changes.
4. On the **Appearance** tab, you have the following options of positioning images in relation to text:
  - a. In **Dimensions**, you can change the display size of an image. 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. **Note** Be careful with this option, it may cause the page to load slowly.
  - b. In **Class**, select a CSS class if any are available for positioning images on your website. Or, select an option in **Alignment** to manually position the image.
  - c. In **Vertical space** and **Horizontal space**, add a value in pixels for the space between the image and the surrounding text if it is not handled by the CSS class. 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 pad-

ding between the image and the text. The preview window allows you to see the result of the different options you choose.

- d. In **Border**, add a value in pixels for the image border if it is not handled by the CSS class.
  - e. Click **Update** to save your changes.
5. On the **Advanced** tab, you can change any of the following:
- a. Select **Alternative image** to add different images for **mouse over** and/or **mouse out**. Browse to select the images in the media library. For best results, these images need to have the same size proportions in pixels.
  - b. In **ID**, you can set a unique identifier for the image. The ID can be referenced by style sheets or by a JavaScript providing additional functionality.
  - c. 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.
  - d. 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.
  - e. 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.
  - f. 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.
  - g. Click **Update** to save your changes.



**Tip** You should always try to have as small file size for images as possible on web content to avoid long downloading times. Therefore compress the image to a smaller file size by cropping or resizing it. Web pages often have a limit for how wide the images can be (usually around 500–600 pixels), check this with your system administrator. For cropping and resizing images it is also possible to select predefined sizes from the **Preset** list, defined by the system administrator in the **web.config** file of your website.


## 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 on the **Media** tab to be able to link to the media file as described in *Managing media*. The most common file formats are supported on the EPiServer CMS sample site. For a detailed description of other formats such as Quicktime, Windows Media and Real Media, please refer to available accessibility coding standards.



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

Insert embedded media as follows:

1. Place the cursor in the editor area where you want to insert your image.
2. Click the **Insert/edit embedded media image** button  on the editor toolbar.
3. In **Type**, select the type of media and associated format, for instance Flash, Quicktime or Windows Media. Flash is selected by default.
4. In **File/URL**, browse to select the media file in the File Manager.
5. In **Dimensions**, set the dimensions of the movie in pixels. Ensure that **Constrain properties** is selected to keep the proportions of the movie.
6. Click **Insert** and the media will be linked into the page.

## Advanced settings

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

### Advanced options

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

### Flash options

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

Tables are used for organizing data in rows and columns to get a better overview of the information. The toolbar buttons for tables are not included on the EPiServer CMS sample site, which means that your system administrator must add them from the administrative interface.

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, preferably by using predefined CSS table classes, but you also have the option of setting the properties manually.

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

### Creating a table

Create a table as follows:

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


### Formatting the table header

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

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

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

### Deleting a table


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

### Organizing the table

You can reorganize the data or create more complex table structures, for example, by merging and splitting cells, as well as inserting and deleting rows and columns.


#### Merging cells

Merge cells in a table as follows:

1. Open the table for editing, place the cursor in one of the cells that you want to merge. This will be cell number one in relation to the cells that will be merged.
2. Select **Merge table cells** .
3. In **Cols**, type the number of cells you want to merge. For instance 2 if you want to merge two cells. You can merge any number of cells as long as the cells are next to each other in the table. The merge will occur to the right of the selected first cell.
4. In **Rows**, type the number of rows where you want to merge the cells. For instance 4 if you want to merge two cells on the nearest four rows. The merge will occur downwards counting from the first selected cell.
5. Click **Update** to merge the cells.

#### Splitting cells

Split cells in a table as follows:

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

### Changing the number of rows and columns

Insert and delete rows and columns in a table as follows:



**Insert and delete columns.** Place the cursor to insert columns before and after the selected column, and you can also delete a selected column.



**Insert and delete rows.** Place the cursor to insert rows before and after a selected row, and you can also delete a selected row.

### Changing 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. When you are done, click **Update** to save the changes.

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.

## General tab

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

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

## Advanced tab

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

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

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

## 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. When you are done, click **Update** to save the changes.

### General tab

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

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

### Advanced tab

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

- **ID.** Type the ID number of the table row for accessibility purposes.
- **Style.** View the current settings for the table row.
- **Language direction.** Define a language direction here if this is different from the rest of the table.
- **Language code.** Define a language code here if the content of the table row is in a different language than the page. Enter the standard language code format, for example it (Italian), es (Spanish), en (English) etc.
- **Background image.** Select a background image to be applied to a table row, and click **OK** to add the image.
- **Background color.** Select a background color for a table row.

## 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. When you are done, click **Update** to save the changes.

### General tab

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

- **Alignment.** Defines the position of the text in the cell.
- **Vertical alignment** . Defines the vertical position of the text in the cells of the table row.

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

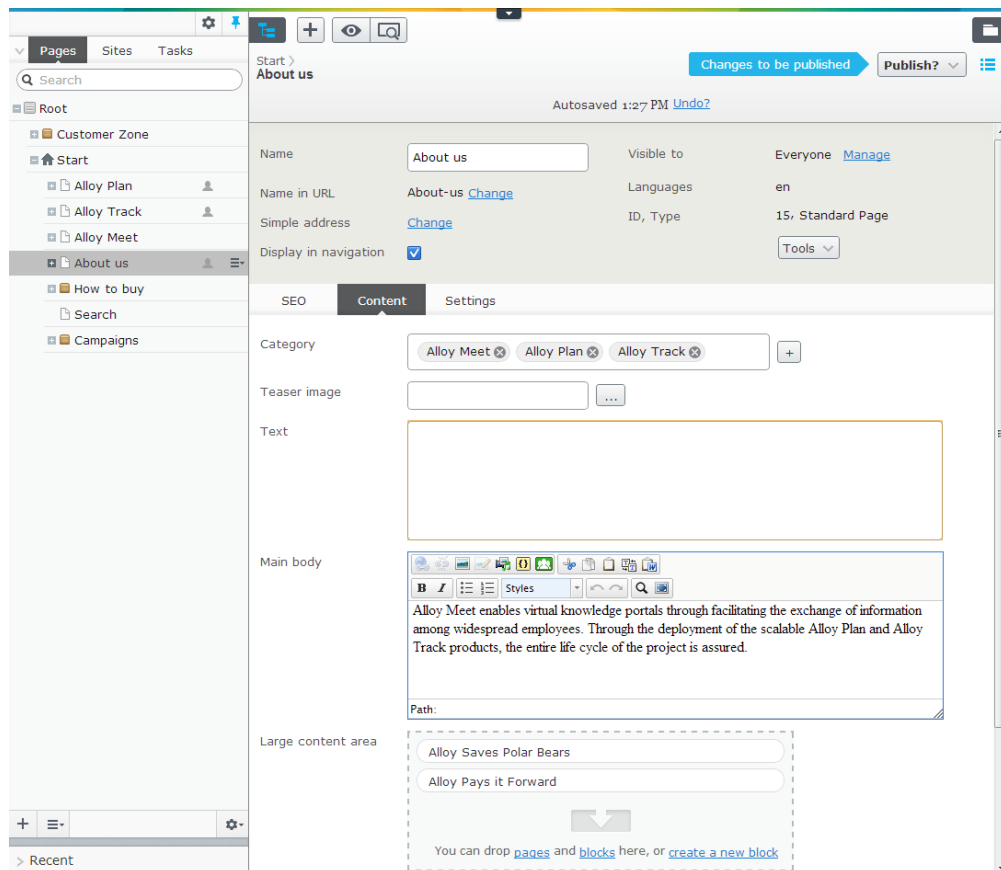
### Advanced tab

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

- **ID.** Type the ID number for the table cell for accessibility purposes.
- **Style.** View the current settings for the table cell.
- **Language direction.** Define a language direction for the cell here, if this is different from the rest of the table.
- **Language code.** Define a language code here if the content of the table cell is in a different language than the rest of the table. Enter the standard language code format, for example it (Italian), es (Spanish), en (English) etc.
- **Background image.** Select a background image to be applied to a table cell, and click **OK** to add the image.
- **Border color.** Select a border color for the cell. You can select colors using the options **Picker**, **Palette** or **Named**, depending on your preferences. Click **Apply** to add the color selection to the table.
- **Background color.** Select a background color for a cell.

## Editing all content properties

You can edit all properties for different kinds of content as described in *Working in edit view*.



## Page settings

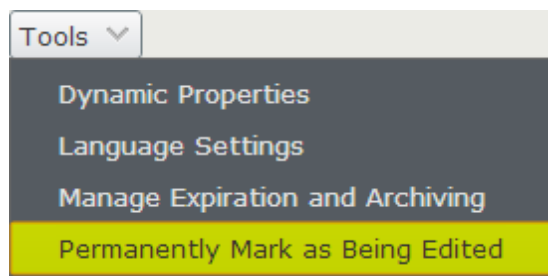
You can edit the following settings for the standard page on the sample site:

- Name.** Required (you cannot leave it blank). Type the name of the page you create here. This name is sometimes used as the heading at the top of the page, and can also be shown in the tree structure and menus.
- Name in URL.** The name in URL applies solely to pages, where web addresses reflect the website's structure. If you provide an address in **Name in URL**, EPiServer CMS will automatically create an address based on the name you have given the page. If you think it is too long and complicated, you can create a name for the page yourself. It is possible to change the name afterwards, but bear in mind that a lot of people may have created a link to your page, and they will not work anymore if you change the name. If you change the name of the page, the field and links to the page are not affected.
- Simple address.** When pages are linked in EPiServer CMS, they are assigned an address that can prove difficult to remember and which you may want to avoid using in a marketing context. **Simple address** allows you to create a link so that visitors can access the page using an understandable address. If, for example, you enter /products in the field, visitors can enter http://www.company.com/products in the address bar of their browser and jump straight to this page. By clicking **Change** you can add a simple address. This function also works if you enter

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

- **Display in navigation.** You do not always want all the pages on a website to be included as options in the menu. If you clear the **Display in navigation** check box, the page will not be visible in the navigation menu. This function may be suitable for forms or other pages that do not need to be present in menus but are instead accessed through links from other pages.
- **Visible to.** You can see the access rights for the content. By clicking **Manage** you can change these settings as described in *Setting access rights from edit view*.
- **Languages.** You can see the language settings for the content and manage them if globalization has been activated on your website, see *Defining language settings*.
- **ID, Type.** Shows the unique ID number and content type used.

## Tools




### Language Settings

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

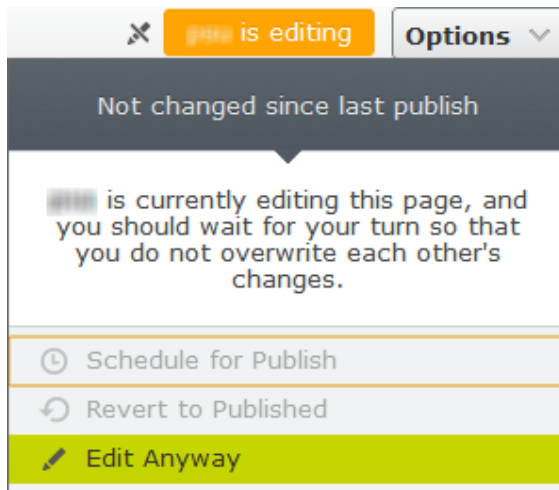
### Manage Expiration and Archiving

Normally pages never expire, but if you want to stop the page of being published at a specific date and time, select **Manage Expiration and Archiving**, see *Setting a date to stop content of being published*.

### Permanently Mark as Being Edited

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


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



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

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

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

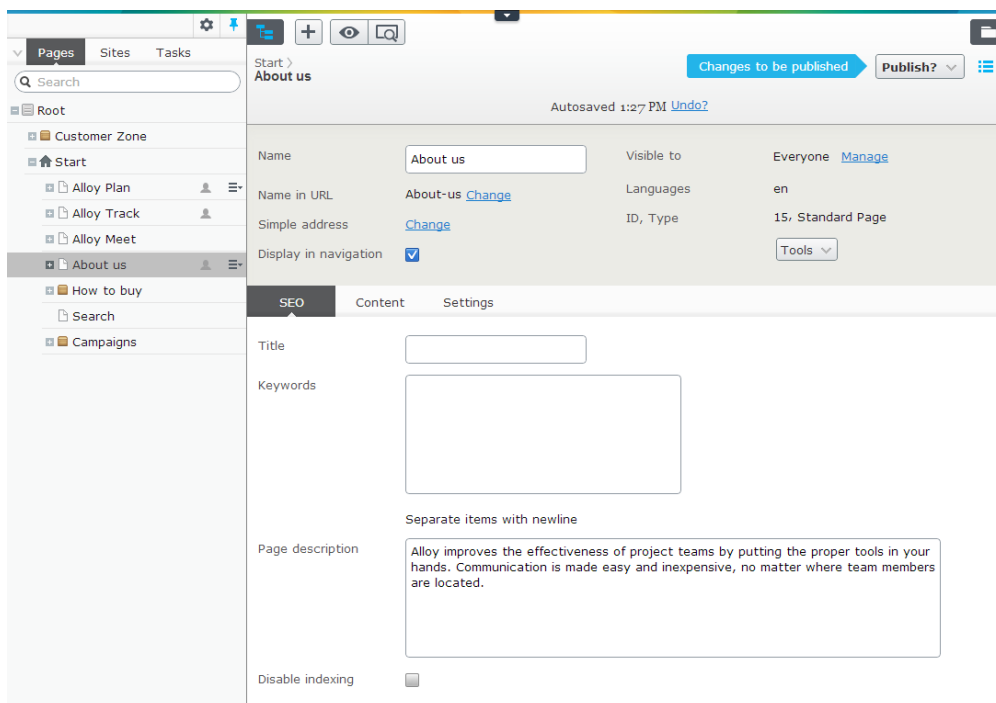
 **Note** Permanently mark content as being edited will not disappear until you manually disable it.

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

## Tab bar and content

Depending on how your website is configured, the **content settings** view has the following tabs and properties on a **standard page** of the sample site:

### SEO



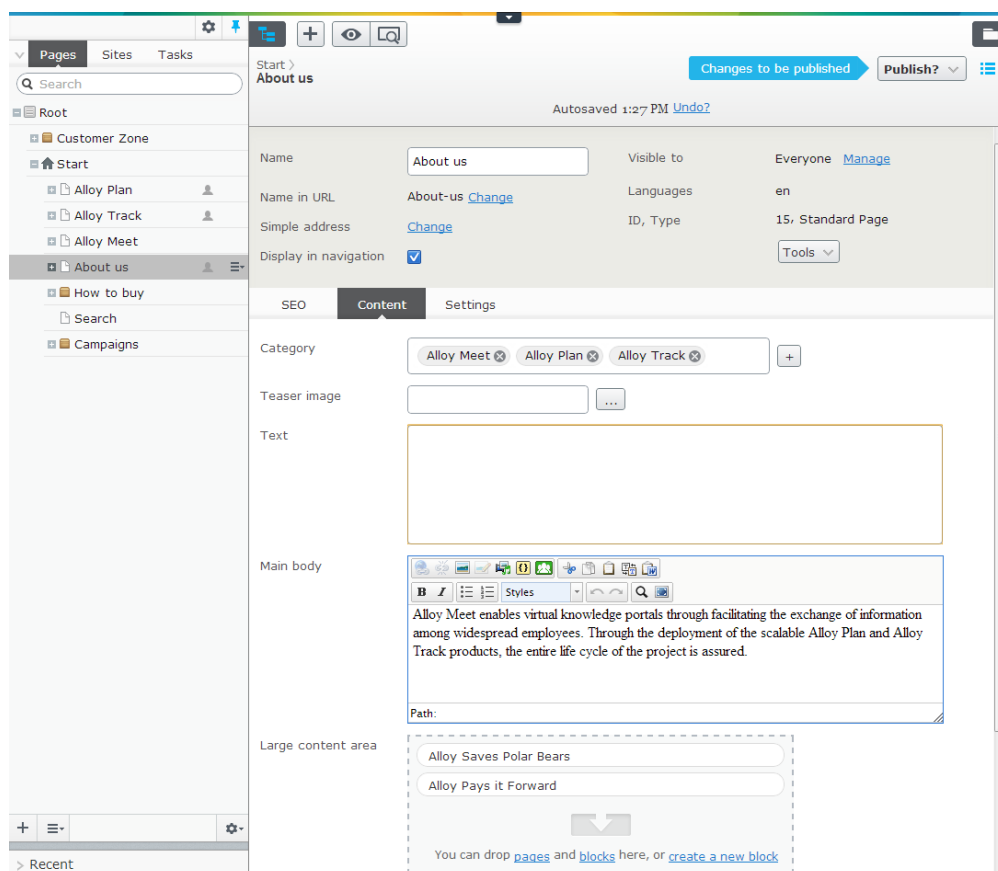


The sample site and templates gives an example on the **SEO** tab how you can provide the following meta tag information to be used by the search engines:

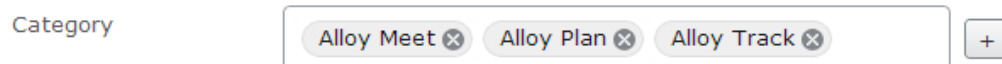
- **Title.** Type the title of the page to be indexed and shown as a link on the search result page by the search engines. If you do not type anything here, the system generates a name based on the page name and website name.
- **Keywords.** Type the metadata keywords for search engine optimization.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

## Content

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



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



Add categories to a page by clicking the button with a plus symbol. In the **Select Categories** window, select each category one by one in the tree. You cannot pick several categories simultaneously by selecting a whole node in the tree. When you are done, click

**OK.**

Delete a category by clicking  for each category in the list.

Categories are created in the administrative interface and applied in the editorial interface, where you can select and apply them to pages.



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

- **Main body.** In the **Main body** editor area you can work with texts and images, create links and add tables, see *Using the rich-text editor*.



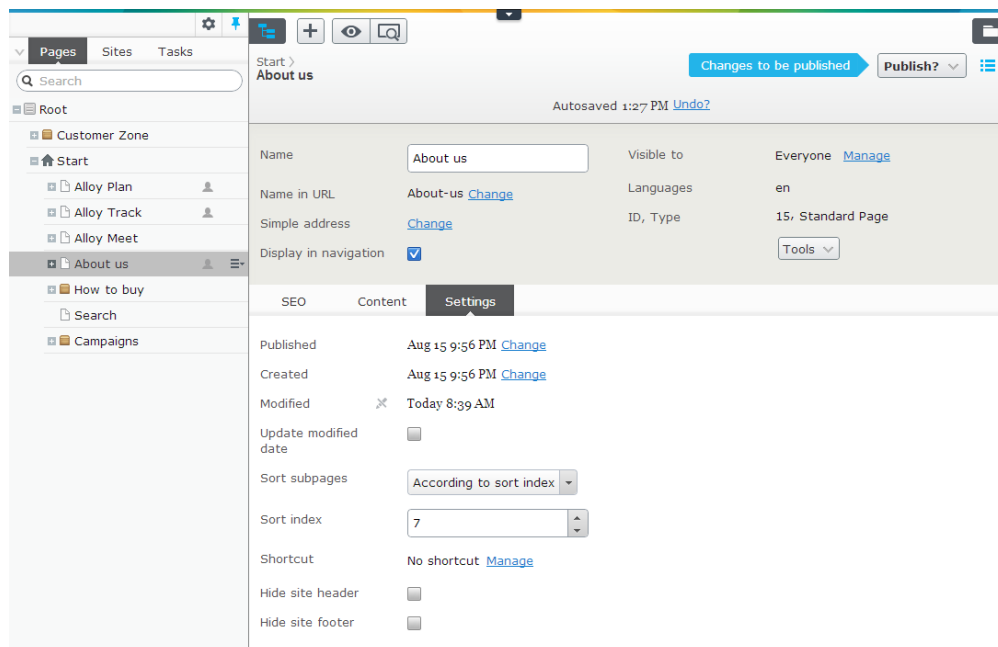
**Note** Not all page types have editor areas.

- **Content Areas.** The example template has the editor sections **Large content area** and **Small content area**, where you can drag and drop pages, blocks and media.



**Note** Not all page types have content areas.

## Settings

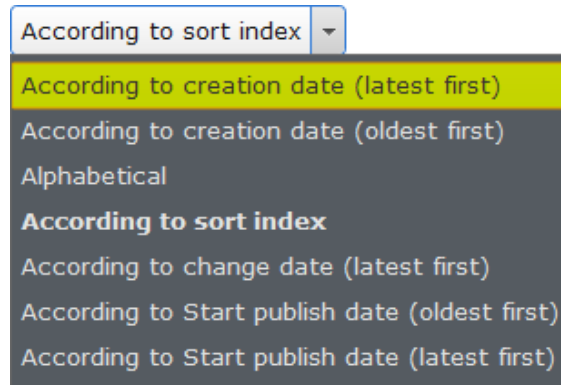


The screenshot shows the 'Settings' tab for the 'About us' page. The left sidebar contains a tree view with 'About us' selected. The main content area displays various settings:

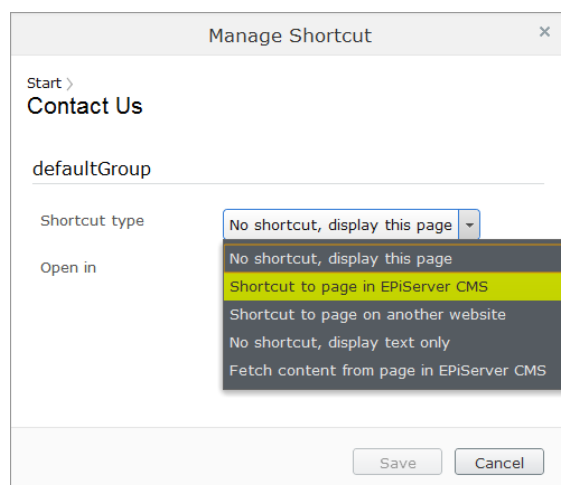
- Name:** About us
- Name in URL:** About-us
- Simple address:** Change
- Display in navigation:** ☒
- Visible to:** Everyone
- Languages:** en
- ID, Type:** 15, Standard Page
- Published:** Aug 15 9:56 PM
- Created:** Aug 15 9:56 PM
- Modified:** Today 8:39 AM
- Update modified date:** ☐
- Sort subpages:** According to sort index
- Sort index:** 7
- Shortcut:** No shortcut
- Hide site header:** ☐
- Hide site footer:** ☐

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

alphabetically or according to the sorting index you have applied.



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



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

- No shortcut.** Selected by default, which means a link that displays the content you have created. By selecting this, you can also reset the page after using other types of links.

- **Shortcut to page in EPiServer CMS.** Used for linking to another page on the same website. This then becomes a direct link to the page you select. A visitor who clicks this link will be transferred to the page you have linked to and its associated menus.
- **Shortcut to page on another website.** Used to link to an external page on the Internet or to a document on the server. Remember to include the whole address, including `http://`. By clicking the button beside the field, you open the link tool in which you can create links as normal. You can link to documents, e-mail addresses, etc.
- **No shortcut, display text only.** Used if you want this page only to constitute a heading in the menu and not display any information or link to another page.
- **Fetch content from page in EPiServer CMS.** The same type of link as **Shortcut to page**. The difference is that instead of being moved to the page you link to, you retrieve information to the page you are on. The visitor remains on the same page, which also retains the same structure. This function is practical when building cross-structures in a website. You can re-use the same information in several different contexts for example on an intranet, but you only need to maintain it in one place.
- **Open in.** Specify how the link is to be opened. This is primarily useful if you have a website that uses frames. It is also common practice to open external links in a new window.

## Setting access rights from edit view

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. Then click **Manage** next to the **Visible to** property in the *all properties editing view* to open the **Set Access Rights for Page** window for the current page. It works in a similar way for blocks as for pages.

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

### Access rights and options

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

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

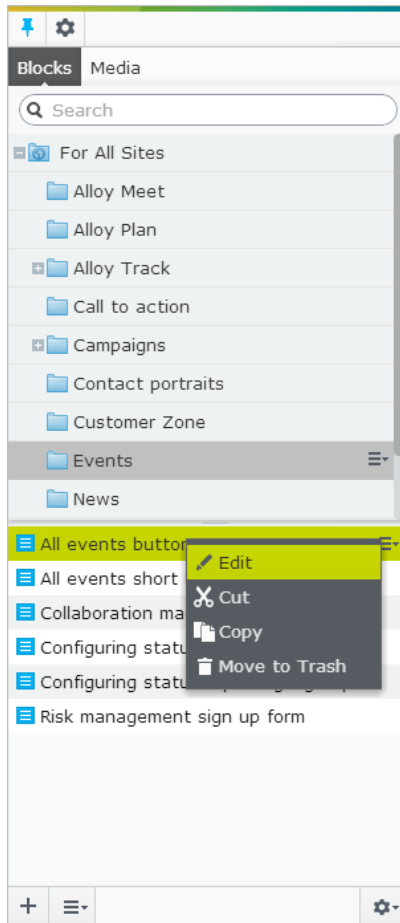
- **Read** means the group/user can read the current content.
- **Create** means the group/user can create content under the current content.
- **Change** means the group/user can edit the current content.
- **Delete** means the group/user can delete the current content.
- **Publish** means the group/user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

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

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

## Assets

Assets are available from the assets pane in EPiServer, and can be content of the type *media files*, for instance images or documents, *blocks*, or products from the catalogs in EPiServer Commerce. Assets are available both in EPiServer CMS and EPiServer Commerce, making it easy to add content by dragging and dropping items into for instance a content area in a page, a block or a product.



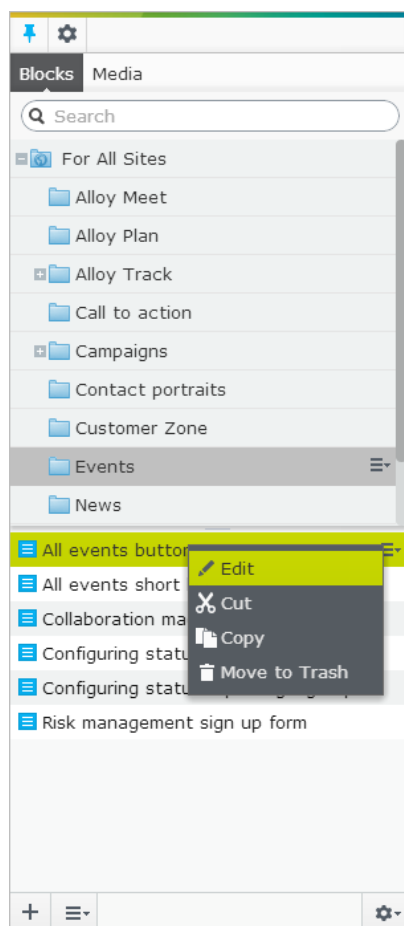
**Note** By default the assets pane in a standard EPiServer installation will contain **Media**, **Blocks** and **Catalog entries** for EPiServer CMS and EPiServer Commerce. Since the assets pane is a plug-in area there might be other assets available in your installation.

You can work directly with content from the assets pane, for instance edit images or blocks, or create folders to organize content items. The context menu will provide different options depending on the type of assets selected. In the following we will describe how to work with content items in the assets pane.

## Blocks

**Blocks** are pieces of content that can be reused and shared between websites, while being maintained in one place only. Typical types of content blocks are campaign teasers and banners, videos, news feeds and contact forms. Just like for pages, you can have different block types, for instance an editorial block, or a form or page listing block.

Blocks are managed from the **Blocks** tab under the assets pane, where you can create new blocks and organize them in folders. You can then utilize blocks by dragging them into content areas of for instance EPiServer CMS pages. You can manage block versions as for other types of content, and blocks can also be personalized to display selected visitor groups.



## Searching and browsing for blocks

Use the search box at the top of the pane to *enter search criteria* and retrieve blocks. Clicking a search result will expand the folder where the block is located. To browse for blocks, click a folder to expand the folders and content beneath it.

## Creating a block



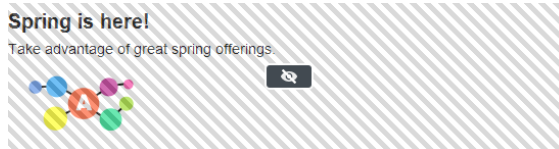
**Note** To be able to create blocks, editors must have **Create** access rights on the **root** directory of the website.

### Creating a block from the Blocks tab in the assets pane

When using this option the block will be saved in the folder of your choice in the block folder structure. The block will be globally available on the website.

1. Select the folder in the structure under which you want the block to be created, and select **New Block** in the context menu, or click the **Add** button.
2. Select the block type among those that are available on your website, and provide a name for the block.
3. Depending on the type of block, add content as appropriate.

- Follow the publishing flow and publish the block immediately or schedule for publishing later. Unpublished blocks will not be visible to visitors, and will appear dimmed out in edit view when added to a content area.

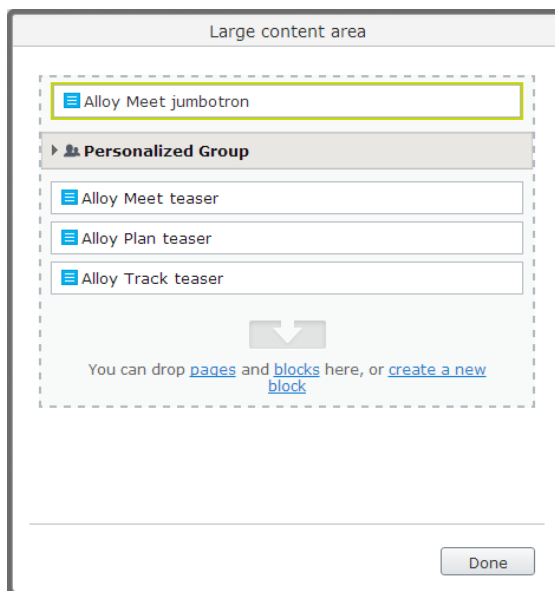


When creating a block, clicking **Back** will take you back to the page or block you were previously working on.



### Creating a block directly from a content area

When using this option the block will be saved in the **For this page** folder for the selected page.



- Click **Create a new block** in the content area, either from the **on-page** or the **all properties** editing view.
- Select the block type among those that are available on your website. The block will get a system-generated name.
- Depending on the type of block, add content as appropriate.
- Follow the publishing flow and publish the block immediately or schedule for publishing later.

About how to add links to the link collection content area or the rich-text editor, see *Creating links*.

### Editing a block



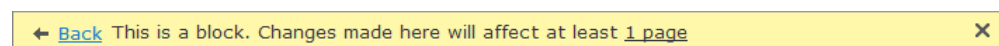
**Note** Changes made to a block that is being used in content on the website, will affect all instances where the block is used.

You can edit blocks either directly from the **content area** where it is being used, or from the **Blocks** tab in the assets pane.



1. Select the desired block to edit, and select **Edit** in the context menu.
2. Depending on the type of block, change the content as appropriate.  
If you want to rename the block, use **all properties editing view**.
3. Follow the publishing flow and either publish the block immediately or schedule for the changes to be published later.

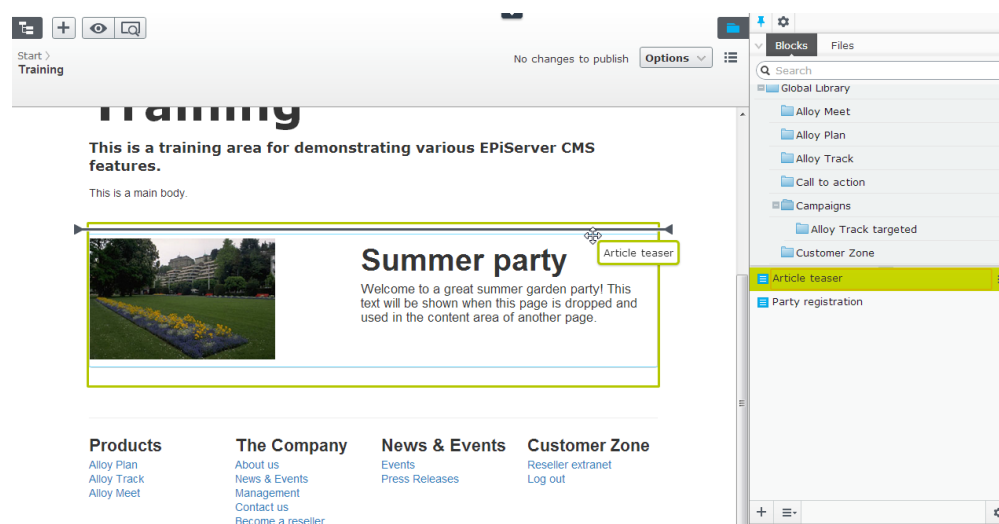
When editing a block, clicking **Back** will take you back to the page or block you were previously working on.



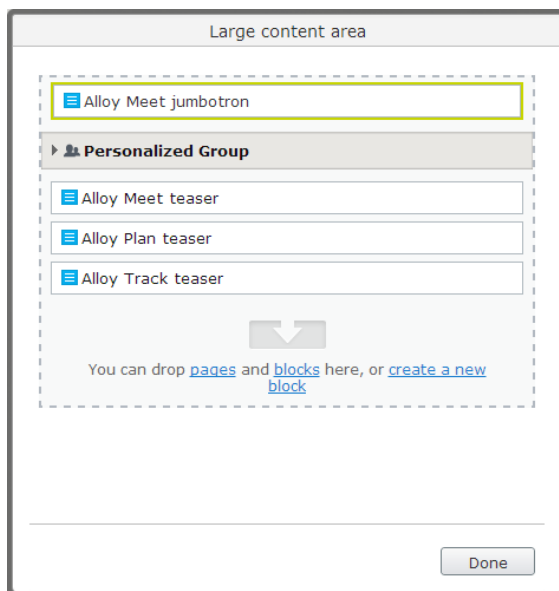
About how to add links to the link collection content area or the rich-text editor, see *Creating links*.

## Using blocks

Blocks can only be added to content areas that support blocks. In edit view, select the desired block in the assets pane, and drag it into a **content area** of a page. A green frame will indicate where it is possible to add blocks in the content.

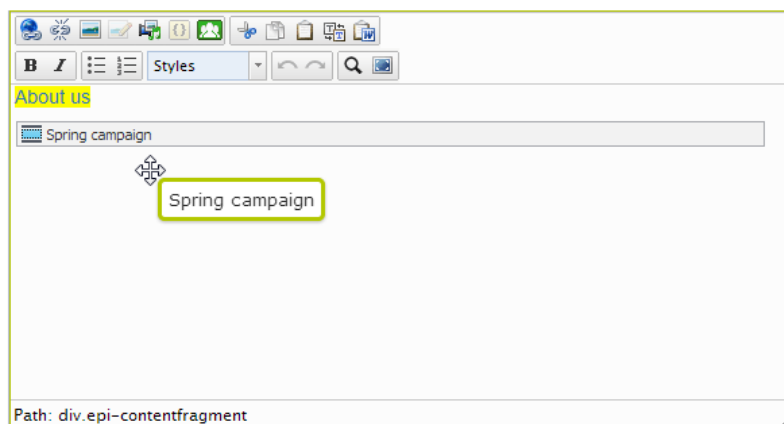


You can add several blocks to the same area. Drag the block above or beneath an existing block, and drop it when the separator appears. Blocks can also be added to a content area from the **all properties editing view**.



**Tip** Like blocks, **pages** from the page tree can also be dropped into a content area. Depending on how the page template is built, the content of the selected page will be rendered in the content area. This is useful when you want to promote a specific page.

Blocks can also be added to a **rich-text editor area** through drag and drop.



To **remove** a block from a content area, select **Remove** from the context menu.



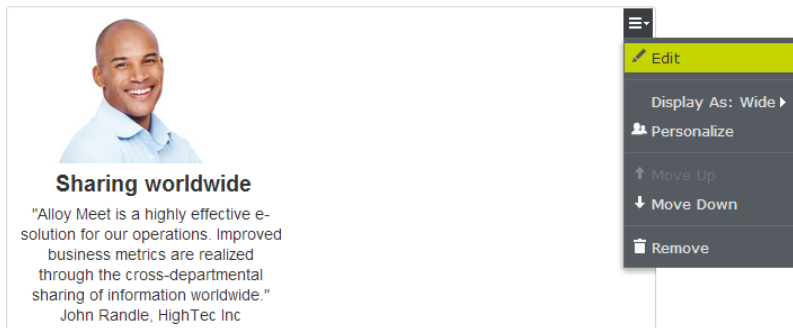
**Tip** Blocks can be **personalized** to display targeted information to selected visitor groups, see *Personalizing content*.



**Note** You cannot link to blocks since they do not have a web address (URL). However, you can create links to other pages and media files if the block contains the rich-text editor (XHTML string property).

### Arranging blocks in a content area

You can change the display order of blocks by **rearranging** them in the content area, either through drag-and-drop, or by selecting **Move up** or **Move down** in the context menu.

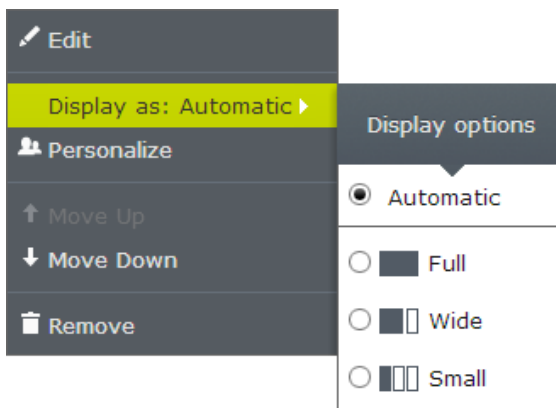


### Displaying blocks in different styles

You can select display options for blocks on a page in different sizes and styles. The rendering of blocks needs to have built-in support for managing different widths, in order for the content to be properly displayed.

The following options are available:

- **Automatic.** Select this option to display the block using an appropriate built-in style option selected by the system.
- **Manually.** Select this option to display the block using the specific style option, for instance presets such as “Full”, “Wide” or “Small”, for the specific context where the block is used.



### Renaming a block

To rename a block, select the block in the tree structure and then in the **all properties editing view** change the **Name** property. Renaming a block will not cause any links to be broken on your website.

### Moving, copying and removing blocks in folders

Moving, copying and removing a media file works in a similar way as for pages by using the context menu.

Since blocks and media files share the same folders, removing a folder from the tree structure will affect all content within the folder. You will be notified about existing references to the content where it is used so that you can remove these links before moving the block to trash.

Note that the block will no longer be available on your website once it has been moved to trash. You can see the blocks you have removed by selecting **View Trash** from the context menu of the block gadget.

### Managing block content in multiple languages

You can see a list of versions for pages or blocks and manage them from the **Versions** gadget,

where you also can manage language versions. To create a block in another language, see *Globalizing content*.

## Managing block versions

Versions for blocks are managed in the same way as for other types of content, using the *Versions gadget*. When you edit an image or update the properties for a block, a new version will be created, which will be listed in the version gadget. This allows you for instance to revert to and republish a previous version of block versions if needed.

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

## Setting access rights for blocks

Just as for other types of content such as pages, it is possible to define access rights for specific blocks. This is done either directly for the block in *all properties editing view*, or for the entire block structure from the admin view in EPiServer CMS.

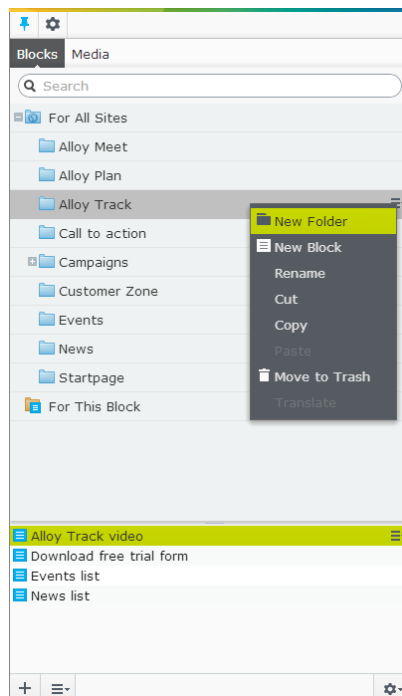


**Note** To be able to create blocks, editors must have **Create** access rights on the **root** directory of the website.

## Folders

**Folders** are used for organizing content such as *media files*, for instance images, videos and documents, as well as *blocks*. You can have folders with content that can be shared between all sites in a multi-site scenario, or you can have folders with content that will only be available for that specific site. There are also local folders, and content stored in these will only be available from that specific content, for instance a page or a block.

Folders are available in the assets pane, where blocks and media files share the same folder structure.



In the EPiServer CMS sample site with templates you will have the following predefined folders:

- **For All Sites**. Content in this global folder can be used and shared between all sites in a multi-site installation.

- **For This Site.** Content in this folder is available for usage on a specific site only, in a multi-site installation. This can be defined when adding a new site, for instance a campaign site, from the EPiServer CMS admin view.
- **For This Page or For This Block.** Content in this local folder is available only for one specific page or block, and cannot be accessed from other pages or blocks. Useful for instance if you have images for a specific purpose and which must not be used elsewhere on the website.

### Creating a folder

To create a folder, select the desired folder in the structure under which you want the new folder to be created, select **New Folder** in the context menu, and provide a name for the folder.

### Moving, copying and removing a folder

Moving, copying and removing a media file works in a similar way as for pages by using the context menu. You can also move folders through drag and drop.

Since blocks and media files share the same folders, removing a folder from the tree structure will affect all content within the folder. You will be notified about existing references to the content where it is used so that you can remove these links before moving the folder to trash. You can see the content you have removed by selecting **View Trash** from the context menu of the **Blocks** or **Media** gadget.

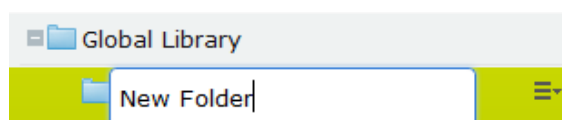
You cannot remove local folders.



**Caution** Moving and removing a folder will change the URL on your website, which might cause broken incoming links from other websites or indexing from search engines.

### Renaming a folder

Select **Rename** in the context menu for the folder you want to rename, and enter a new name. Renaming a folder will not cause any links to content to be broken on your website.



**Caution** Renaming a folder or media file will change the URL of these assets on your website, which might cause broken incoming links from other websites or indexing from search engines.

### Managing folders in several languages

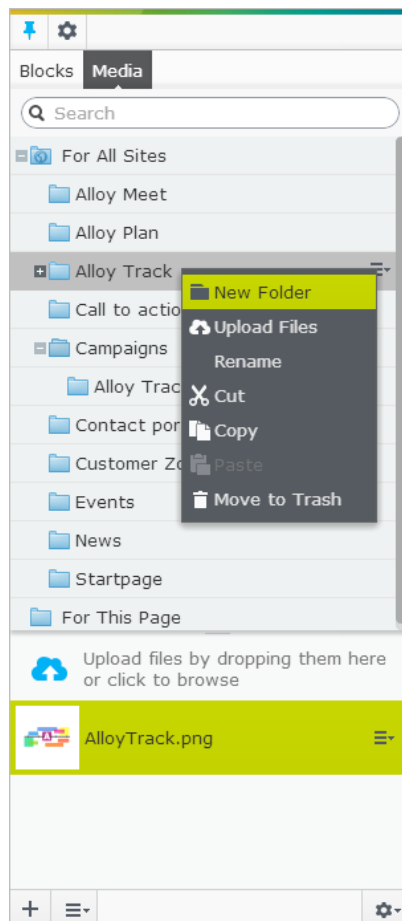
You cannot create language versions for folders, but you can name them, for example, with a language code. The folder structure for blocks and media will look the same no matter which language you select under the **Sites** tab in the navigation pane. Refer to the section about globalizing content in the EPiServer CMS documentation.

### Setting access rights for folders

By default the predefined global folder is available to everyone. Local folders will inherit the access rights from the content (page or block) to which they are associated. It is possible to define access rights for specific folders in a structure. Setting access rights for folders is done from the admin view in EPiServer, in the same way as for pages in the page tree structure.

## Media

**Media** in EPiServer are files that can be for instance an image, a document such as a pdf document or a Word document, a video or mp3 files. Media is managed from the media library on the **Media** tab in the assets pane. Here you can *create folders* and upload media files. You can then make use of your media by dragging them into an EPiServer CMS page or a block, or associate them with a product in EPiServer Commerce.



### Searching and browsing for media files

Use the search box at the top of the pane to *enter search criteria* and retrieve media files. Clicking a search result will expand the folder where the file is located. To browse for media files, click a folder to expand the folders and content beneath it.

### Uploading a media file

Media files are most easily uploaded through drag-and-drop operations from a file location on your computer, to the upload area. You can also click directly in the upload area to add files. Or, you can select **Upload Files** in the context menu for the target folder you want to upload the files to.

Upload media files through drag and drop as follows:

1. Click the media folder to which you want to upload media files.
2. On your computer, browse and select one or several files that you want to upload (hold down Ctrl or Cmd for multiple selection), and drag them into the upload area. An upload

status window will be displayed.

- When you are done, click **Close**.

## Previewing media

Media files in list views are represented by thumbnail images. Common image file formats are rendered for preview by default on the EPiServer CMS sample site, but your partner developer can build rendering for other file formats.

Depending on the type of media file, you will get the following preview options on double-click:

- An image or video will open preview
- Other media files will open all properties editing view

No matter what kind of file type, you can download the previewed file by selecting **Options** > **Download this file**.

## Downloading a media file

To download a media file, select it in the tree structure and then **Download** in the context menu. Or, if you open the image or video for preview, select the download option from the **Options** combo button on the toolbar.

## Adding an image to content

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

- Edit the page, and select the **Media** tab.
- Select the image you want and drag it where you want it on the page.



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

## Editing an image

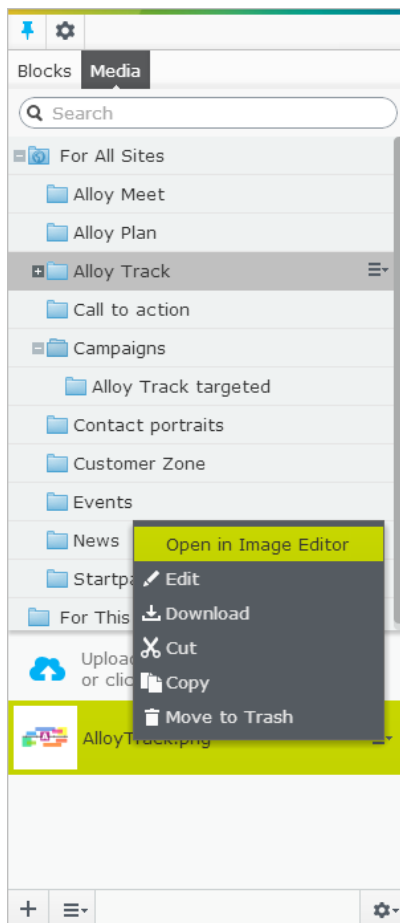
The **Image Editor** in EPiServer provides basic image editing features such as cropping, resizing and transforming. The edited image file can either be saved as a copy, or replace the original file.

You can access the image editor in the following ways:

- From the **Media** tab in the assets pane.
- From the rich-text editor. Here you can also edit the image properties, for example, apply a CSS class to the image.



**Tip** You should always try to have as small file size for images as possible on web content to avoid long downloading times. Therefore compress the image to a smaller file size by cropping or resizing it. Web pages often have a limit for how wide the images can be (usually around 500–600 pixels), check this with your system administrator. For cropping and resizing images it is also possible to select predefined sizes from the **Preset** list, defined by the system administrator in the **web.config** file of your website.

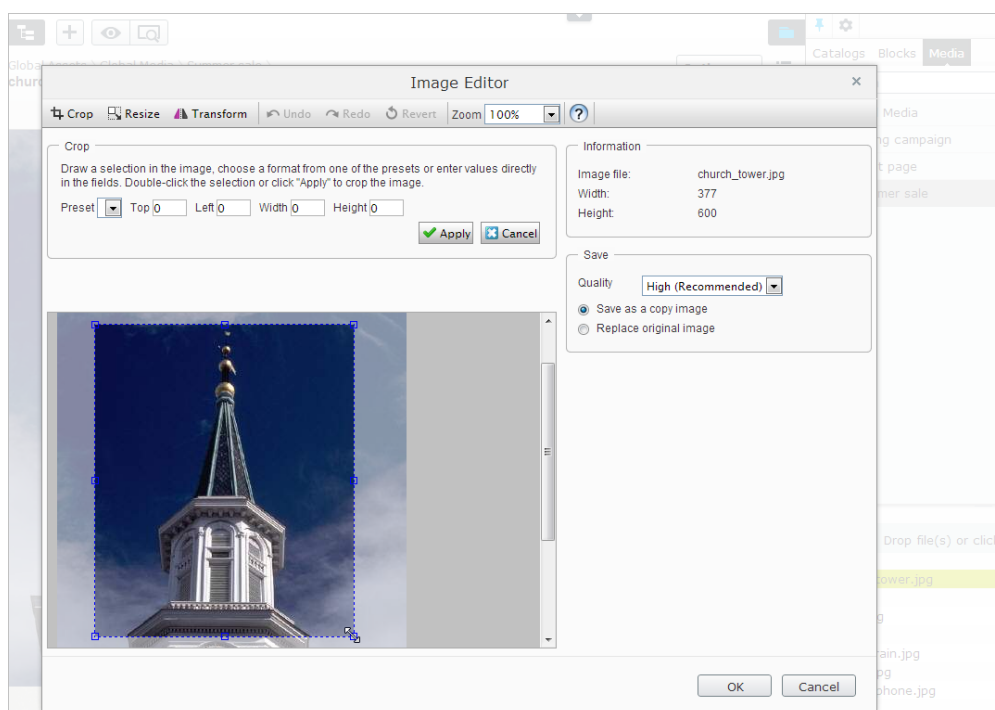


Edit an image as follows:

1. Select the image in the tree structure and then **Open in Image Editor** from the context menu.
2. In **Image Editor**, crop, resize and transform the image as follows:
  - **Crop.** Select the area to crop the image either by entering values in the **Top**, **Left**, **Width** and **Height** boxes or by drawing a selection in the image. You can also use presets if any are configured by the system administrator.
  - **Resize.** Change the image size by either moving a corner handle or entering a value in the **Width** and **Height** boxes. Keep **Constrain proportions** selected to retain the image's proportions. You can also use presets if any are configured by the system administrator.
  - **Transform.** Flip or rotate the image, or select **Grayscale** if you want to convert to grayscale.



- When cropping or resizing, remember to click **Apply** to save the changes before proceeding.



- Select any of the following saving options:
  - Save as a copy.** Select to save the image as a copy of the original image. Name for the image file copy and click **OK**. Note the following:
    - If you have selected the image from the tree structure in the media library for editing, the copy will be saved in the same folder as the original file.
    - If you have selected the image on a page for editing, the copy will be saved in a local folder for that page.
  - Replace original image.** Select to replace the original image on the web server with the edited image. Confirm by clicking **OK**. Note that this action will affect all places on the website where the image is used.
- When you are done, click **OK**.

## Removing an image from content

To remove an image from the content, select it in the rich-text editor and press Delete or Cmd+Delete. Note that the image disappears from the content, but is not deleted from the media library shown on the **Media** tab.

## Editing metadata for media files

The metadata fields available depends on the implementation. For images it can be for instance photographer, description and copyright information.

To edit metadata, select the media file in the tree structure and then *all properties editing view*.



## Renaming a media file in the library

To rename a media file, select the media file in the tree structure and then *all properties editing view*. Change the **Name** and the **Name in URL**. Renaming a file will not cause any links to be

broken on your website.



**Caution** Renaming a folder or media file will change its URL on your website, which might cause broken incoming links from other websites or indexing from search engines.

### Replacing a media file in the library

To replace an existing media file with another, upload the new file with the exact same name and in the same folder as the file you want to replace. See the section about upload through drag and drop. Confirm the action by selecting **Replace File (Replace Files)**, or cancel the action by selecting **Skip this File (Skip these Files)**. Media files that are replaced will be published immediately, and this action affects all places on the website where these files are used.



**Note** In some cases when replacing original images, the changes will not be immediately visible due to website caching. You may need to refresh the page to make the changes appear.

### Moving, copying and removing a media file from the library

Moving, copying and removing a media file works in a similar way as for pages by using the context menu.

Moving a media file will not affect the content where it is used, but it may cause that it will be hidden for users that have no access rights.

Since blocks and media files share the same folders, removing a folder from the tree structure will affect all content within the folder. You will be notified about existing references to the content where it is used so that you can remove these links before moving the file to trash.

Note that the file will no longer be published on your website once it has been moved to trash. You can see the content you have removed by selecting **View Trash** from the context menu of the media gadget.



**Caution** Moving and removing a media file will change its URL on your website, which might cause broken incoming links from other websites or indexing from search engines.

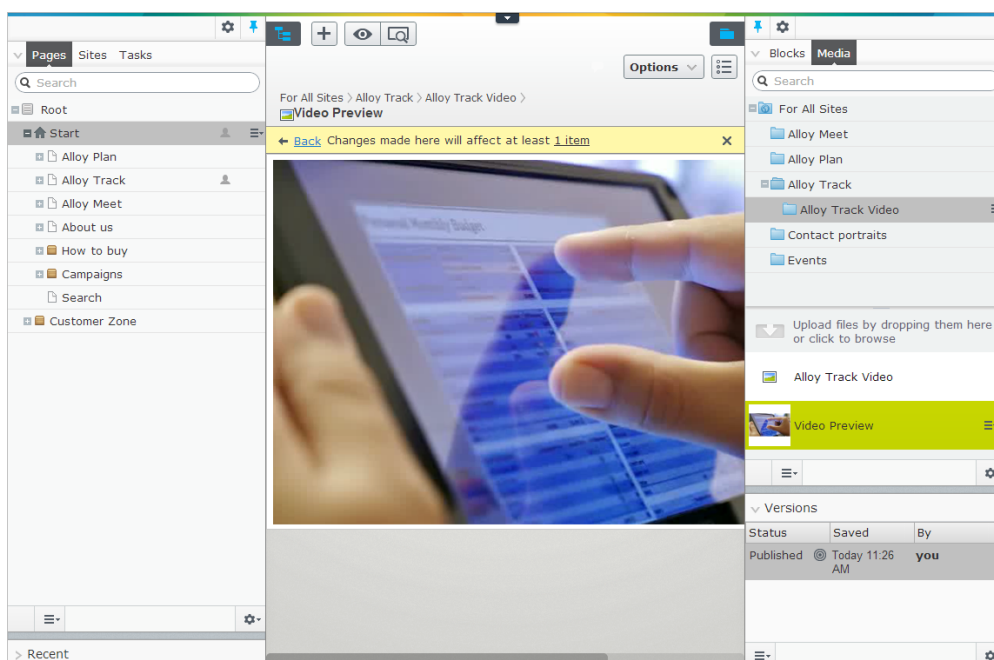
### Managing media files in several languages

You cannot create language versions for media files or their folders, but you can name them, for example, with a language code. The folder structure for blocks and media will look the same no matter which language you select under the **Sites** tab in the navigation pane. Refer to the section about globalizing content in the EPiServer CMS documentation.

### Managing media file versions

Versions for media files are managed in the same way as for other types of content, using the *Versions gadget*. When you edit an image or update the metadata for the image, a new version will be created, which will be listed in the versions gadget. This allows you for instance to revert to and republish a previous version of image versions if needed.

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



## Adding dynamic content

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




**Tip** To reuse content, consider using blocks instead as described in *Assets – Using shared content*.

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

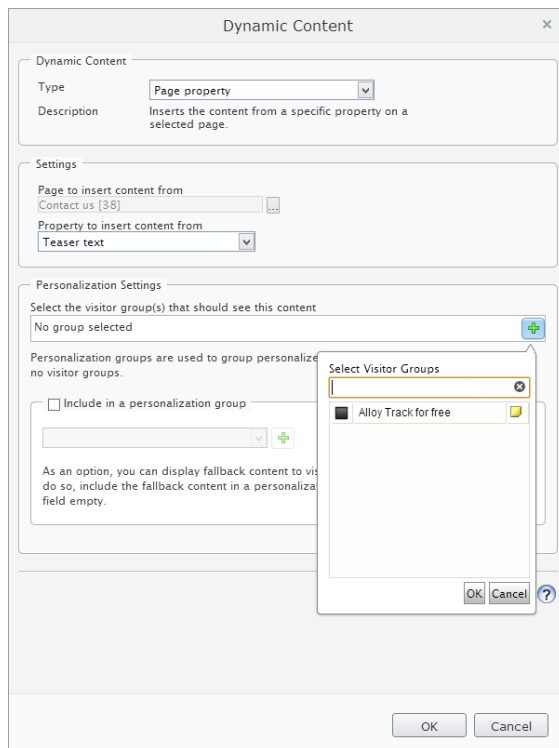
In addition, you can combine dynamic content with a visitor group as described in *Personalizing content*.

### Adding dynamic content from a page property

Add dynamic content from a **Page Property** as follows:

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


5. In **Personalization settings**, you can click **+** to select the visitor group you want to have access to the dynamic content. Optional.



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


# Alloy Track

Projects have a natural lifecycle with well-defined stages. Progress making sure that your project is on-track and d.




From start-up meetings to final sign-off, we have the solutions for today's market-driven needs. Leverage your assets to the fullest through the combination of Alloy Plan, Alloy Meet and Alloy Track.

Sales figures are just a click away. Alloy Track lets you monitor business metrics at each stage of your project to make sure that you get the highest possible ROI.

 Page property

From page: **Contact us [38]** Property: **Teaser text**

 Alloy Track for free

## Get a free license!

Right now you have the possibility to download a full version Alloy Track for free

7. *Preview* the content.
8. *Publish*.

## Editing dynamic content

You can cut, copy and paste dynamic content boxes in the editor area, just as you can with any other objects. When you have opened the page containing the dynamic content box, you can edit it in the following way:

1. Select the “box” with dynamic content in the editor area, and click the **Dynamic content** toolbar button .
2. Make your changes to the dynamic content and click **OK**.
3. *Publish*.



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

## Deleting dynamic content

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



## Structuring the website

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

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

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

The nodes in the structure has the following symbols:









-  The root of your website.
-  The start page on your website.

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

You can also create a block which is a piece of information, for instance a banner or a news listing, which can be inserted into the page you are editing. Blocks are useful when you want to reuse and share information components on your website. See *Blocks* for more information on how to create blocks.

## Symbols for pages in the tree structure

Using the following symbols on the EPiServer CMS sample site you can gain a quick overview of the pages in the tree structure:

-  A page for published content.
-  A container page used to store and edit data in the tree structure, not visible on the website.
-  A new page that has not been published yet.
-  A new page that has been scheduled for publishing, not visible on the website yet.
-  A page that has been scheduled with an expiry date and time, where the date and time have passed, not visible on the website.
-  Changes on the page have been rejected.
-  A page that is locked, you do not have access rights to change it.
-  A page is edited by another user in EPiServer CMS.

Your website might have been customized with other symbols implemented by the partner developer.

## Moving, copying and removing pages

You have the following options to work with the tree structure in the navigation pane:

### Cut

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

You can also move pages by using Ctrl+x or Cmd+x and paste by using Ctrl+v or Cmd+v on the keyboard to perform this action.

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

The page will automatically change sort order in the page tree, see *Sorting page order in menus*.

## Copy

Select the page you want to copy and select **Copy** in the context menu. Select the page to which you want to copy your page and select **Paste**.

You can also copy pages by using Ctrl+c or Cmd+c and paste by using Ctrl+v or Cmd+v on the keyboard to perform this action.

An identical copy of the copied page will now be placed at the chosen location ready for editing.

For pages all underlying subpages and associated media files in the page's local folder will also be copied, and the links will point to the new copy of the page. Remember that settings, such as authorizations, dynamic properties and categories, are also copied to the new page. These settings are done in the all properties editing view.

The page will automatically change sort order in the page tree, see *Sorting page order in menus*.



**Note** When you copy and paste a page under the same node, the **Name in URL** property of the copied page will be named typically [Name in URL1], which you should change after copying.

## Paste

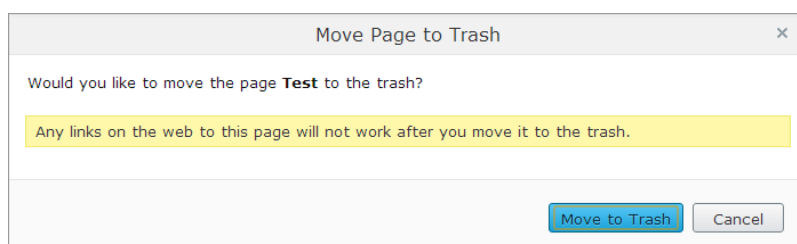
Select content to move or copy, then select the page where you want to paste the page and select **Paste** in the context menu. Confirm the action, and the page will be created under the page you have selected.

## Remove

Removing content such as folders, pages, blocks and media files from the tree structure and move it to trash means that it will no longer be published on your website.

Remove a page as follows:

1. Select the page you want to remove from the tree structure and select **Move to Trash** in the context menu. (You can also remove a page by pressing Delete or Cmd+Delete on the keyboard to perform this action.) If other content link to the page you want to remove, a dialog will show which content contain these links and request you to remove them. This dialog changes depending on in which context it is used, and if the content has subitems.



Move Folder to Trash

Would you like to move the folder **Events** to the trash? The **blocks** and **media** contained in this folder will also be moved to the trash.

The folder or its contents are used in the following places. To avoid errors on the site, make sure that they are not used anywhere.

**4 links in total** [Refresh list](#)

|                           |   |
|---------------------------|---|
| News & Events             | Start > About us                          |
| Reporting Made Simple     | Start > About us > News & Events > Events |
| Collaboration Made Simple | Start > About us > News & Events > Events |
| Risk Management           | Start > About us > News & Events > Events |

Move to Trash Anyway [Cancel](#)

Move Folder to Trash

Would you like to move the folder **Test** to the trash?

No other content uses this folder. It can safely be moved to the trash.

[Move to Trash](#) [Cancel](#)

- Click to open each page so that you can remove the links to the content you want to remove.
- When you are done, click **Move to Trash Anyway** to confirm the removal.

**Caution** If you move the page to trash without removing the links from the content listed in the dialog, it will cause these links to break on your website.

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

For more information on how to restore content that has been removed from the tree structure, see *Handling content in trash*.

## Sorting page order in menus

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

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

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



Start > Alloy Track > Whitepaper

Autosaved 4:03 PM [Undo?](#)

Name: Whitepaper Visible to: Everyone [Manage](#)

Name in URL: download-whitepaper-alloy... [Change](#) Languages: en

Simple address: [Change](#) ID, Type: 12, Standard Page

Display in navigation: ☒ Tools

SEO Content **Settings**

Published: 9/13/12, 4:04 PM [Change](#)

Created: 9/13/12, 4:04 PM [Change](#)

Modified: ☒ Oct 29, 2:34 PM

Update modified date: ☐

Sort subpages: [According to creation date \(latest first\)](#)

Sort index: [According to creation date \(latest first\)](#)

Shortcut: [According to creation date \(oldest first\)](#)

Hide site header: [Alphabetical](#)

Hide site footer: [According to sort index](#)

[According to change date \(latest first\)](#)

[According to Start publish date \(oldest first\)](#)

[According to Start publish date \(latest first\)](#)

Set the sort order as follows:

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



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

### Sorting according to sort index

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

Change the sort order of pages by dragging the page and drop it where you want it in the tree structure. Sorting pages with drag and drop will only be of interest for branches that are sorted with sort index.

- If you move a page into a branch that is not sorted according to sort index, you will get prompted to move the page and at the same time apply sort index as sort order for that

branch. Confirm with **OK**. When you drag a page into a new position in a page tree branch, the sort index will automatically be recalculated to fit the sort order of that branch.

- If you drop a page under a different parent page (with sort index set as sort order), the page will first be moved or copied, and then sorted. The page will thus remain in the tree in the position where it was first dropped.



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

## Sorting according to sort index manually

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

The screenshot shows the 'Settings' tab for a page named 'Whitepaper'. The page is currently unpublished, as indicated by the 'Publish?' button in the top right. The 'Sort subpages' dropdown is set to 'According to sort index', and the 'Sort index' is set to 130. Other settings include 'Name: Whitepaper', 'Name in URL: download-whitepaper-alloy...', 'Simple address: Change', 'Display in navigation: checked', 'Visible to: Everyone', 'Languages: en', 'ID, Type: 12, Standard Page', 'Published: 9/13/12, 4:04 PM', 'Created: 9/13/12, 4:04 PM', 'Modified: Oct 29, 2:34 PM', 'Update modified date: unchecked', 'Shortcut: No shortcut', 'Hide site header: unchecked', and 'Hide site footer: unchecked'.

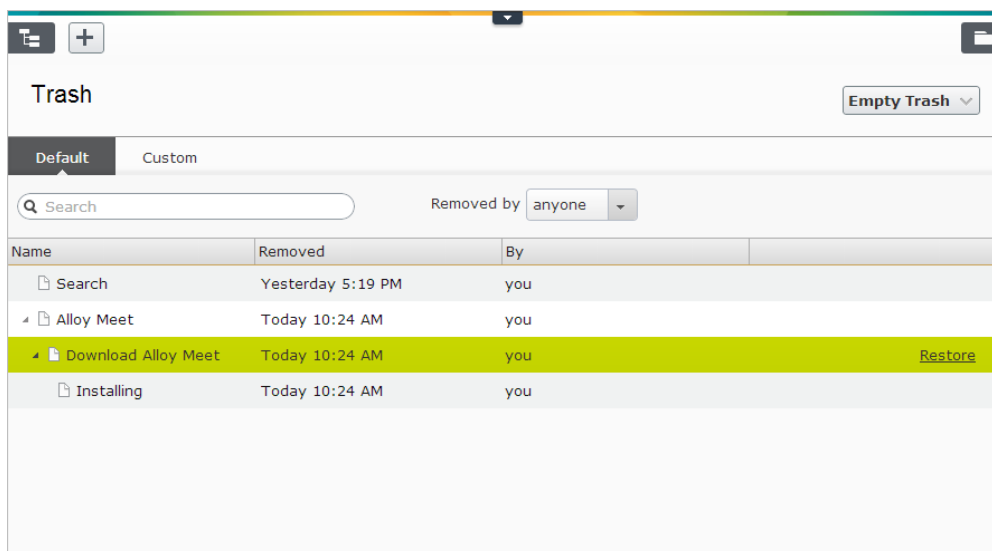
## Handling content in trash

**Trash** is a separate node in the tree structure. When you remove a page, block or media file from the tree structure, the content and all underlying items are sent to trash and are automatically unpublished from the website.

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

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

## Accessing trash



The following example shows

Access trash as follows:

1. In the gadget options, select **View Trash** to view the removed content.



2. Select the content you want to view from trash. You can also search for content by keyword or user.
3. You can delete all content permanently if you want, depending on your access rights.

## Restoring content from trash

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

## Emptying trash manually

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

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



**Caution** Emptying trash will delete **all content** permanently, and cannot be undone.

## Managing versions

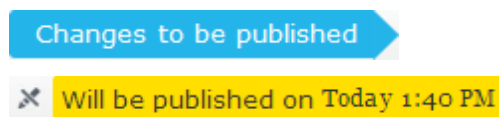
EPiServer allows you to work with version management. A page or a block that has previously been published and then changed, will be saved as a new version. When you are working on a page or a block, you might want to see its version status. Managing versions give you the opportunity to access and republish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

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

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

### Content status on the toolbar

When you are editing content in full width, you will see status information in full text on the toolbar as shown in the following examples:



The symbol of the pen ✎ means that the content is not available for editing until you cancel the settings, for example, a scheduled publishing.

When the navigation pane and assets pane are pinned, the toolbar shows the following status symbols of the content:

|  |   |
|--|---|
|  | A page or a block that has been published will be in <b>Published Version</b> status and no status symbol is shown.   |
|  | A page or a block that has been set to <b>Ready to Publish</b> will be in <b>Ready to Publish</b> status.   |
|  | A new page or a block that has not yet been published or set to ready to publish, will be in <b>Not Ready</b> status.   |
|  | A published page or a block that has been changed but not yet published, will be in <b>Not Ready</b> status. It could also has been set to <b>Ready to Publish</b> , if it was not approved it will be in <b>Rejected</b> status. |
|  | A page or a block that has been scheduled for publishing: <ul style="list-style-type: none"> <li>• New will be in <b>Published</b> status</li> <li>• Changed will be in <b>Delayed Publish</b> status</li> </ul>                  |

### Versions gadget

You can see a list of versions for pages or blocks and manage them from the **Versions** gadget, where you also can manage language versions.

| Versions  |                |     |
|---|----------------|-----|
| Status  | Saved          | By  |
| Draft   | Today 10:55 AM | you |
| Delayed Publish   | Today 10:54 AM | you |
| Draft   | Today 10:54 AM | you |
| <div> <div> Set as Primary Draft </div> <div> Delete Version </div> <div> Delete All Swedish Versions </div> </div> |                |     |
| <div> <div></div> <div></div> </div>  |                |     |

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

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




**Tip** Clicking **Options > View on website** will take you to view the current published page as your visitors see it.

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

### Editing a shared draft version

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

The shared draft has the symbol .

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



**Tip** You can schedule several versions of pages and blocks for publishing, for example, in a scenario of managing multiple campaigns and scheduling multiple banner adverts on a landing page. Use **New Draft from Here** to create another version for scheduling.

### Editing a version

Select the content version you want to edit from the version list, and make your changes as

described in *Working in edit view*.

### Deleting a version

You can delete a single version of content you do not want to keep by selecting **Delete Version** from the context menu. Confirm the deletion. Note that this action cannot be undone.

| Versions  |                      |                |           |
|---|----------------------|----------------|-----------|
| Language  | Status               | Saved          | By        |
| sv  | Published            | Today 10:17 AM | you       |
| sv  | Previously Published | Today 10:17 AM | you       |
| en  | Published            | Today 6:40 AM  | installer |
| <div> <div>Set as Primary Draft</div> <div>Delete Version</div> <div>Delete All Swedish Versions</div> </div> |                      |                |           |



**Tip** If you do not want it to be possible to delete older page versions in the version list, the delete access rights can be disabled from admin view.



**Note** You cannot delete a published page version, as well as you cannot delete a recently created page in an unpublished version.

### Republishing content

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

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

### Managing language versions

You can see a list of versions for pages or blocks and manage them from the **Versions** gadget, where you also can manage language versions.

By default all language versions are displayed with a language code in the version list. If you only want to see the versions for a particular language you have selected under the **Sites** tab, select **Show Content in [language] Only** from the **Versions** gadget.

| ▼ Versions  |           |                |                  |
|---|-----------|----------------|------------------|
| Language  | Status    | Saved          | By               |
| sv  | Published | Today 10:42 AM | <b>you</b>       |
| en  | Published | Today 10:34 AM | <b>installer</b> |
| <div> Show Content in svenska Only Remove Gadget </div> |           |                |                  |
| <div> <div>☰</div> <div>⚙</div> </div>                  |           |                |                  |



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

To create content in another language and manage language versions, refer to *Globalizing content*.

# Globalizing content

EPiServer CMS supports multiple language versions of website content. You can have the entire website content translated into several languages or only parts of it.

Every website has a so-called **default language** set up in the administrative interface, which is the language that is shown primarily to website editors and visitors.

The **master language** is the language in which the first version of the content has been created. For content that is not translated you can set a *fallback language* or *replacement language* on all content or an individual page.



**Tip Languages** is available as an optional add-on in the Add-on Store. To be able to use this feature, your system administrator must install the add-on as described in the EPiServer platform documentation.



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

## Creating globalized content work procedure

Create globalized content in the following steps:

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

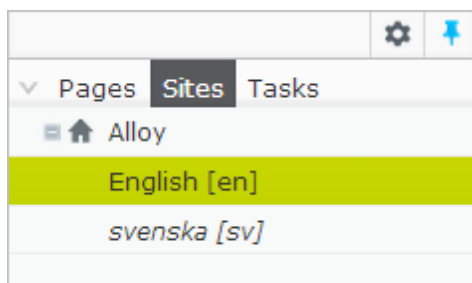
## Step I: Selecting language

### Pages

The **Sites** tab in the navigation pane displays the languages that you have access to create and edit pages in. The chosen default language for the website is shown at the top of the language tree structure. All pages are displayed in the tree structure by default, also for content that has not yet been translated.

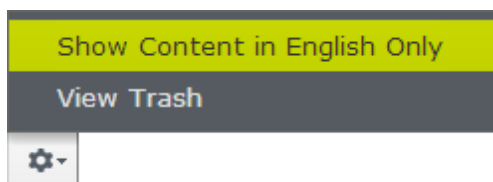
The following example shows the master language “English”. The language “svenska” (Swedish) in italics is available on the website, but has not yet been activated in edit view. You can see the language settings for the content and manage them if globalization has been activated on your website, see *Defining language settings*.





Selecting another language such as “svenska” under the **Sites** tab will reload the tree structure. All pages on the website are displayed by default in the tree structure, not translated pages are in italics and have a language code representing the master language.

If you only want to see the pages for the particular language you have selected under the **Sites** tab, select **Show Content in [language] Only** from the **Pages** gadget.




## Blocks

Translation of blocks works in a similar way as for pages. Select the language you want to translate to on the **Sites** tab. All blocks on the website are displayed by default, not translated blocks are in italics and have a language code representing the master language.

If you only want to see the blocks for the particular language you have selected under the **Sites** tab, select **Show Content in [language] Only** from the **Blocks** gadget.

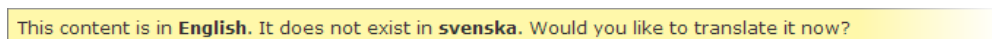


**Note** Pages and blocks have properties with the symbol . These are shared by all languages, and cannot be edited or translated.

## Step 2: Creating content in another language

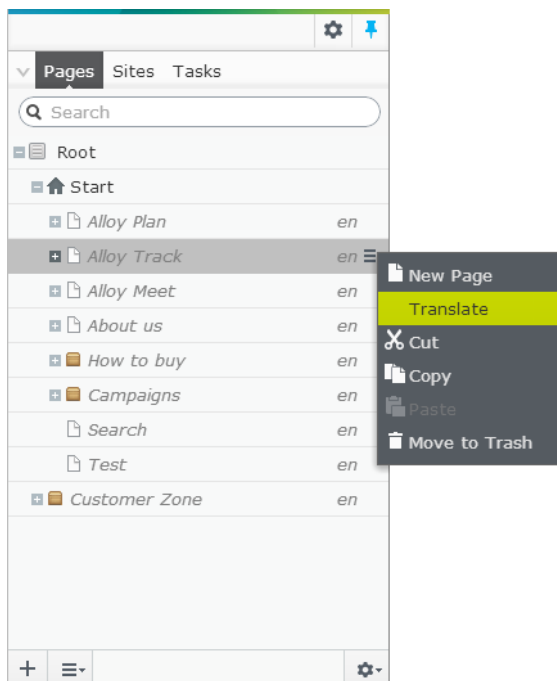
If the content has not been created in another language version, a language code and a notification will be displayed to the editor that the language is missing and the content is shown to the website visitors in the selected **fallback language**. You can see the language settings for the content and manage them if globalization has been activated on your website, see *Defining language settings*.

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

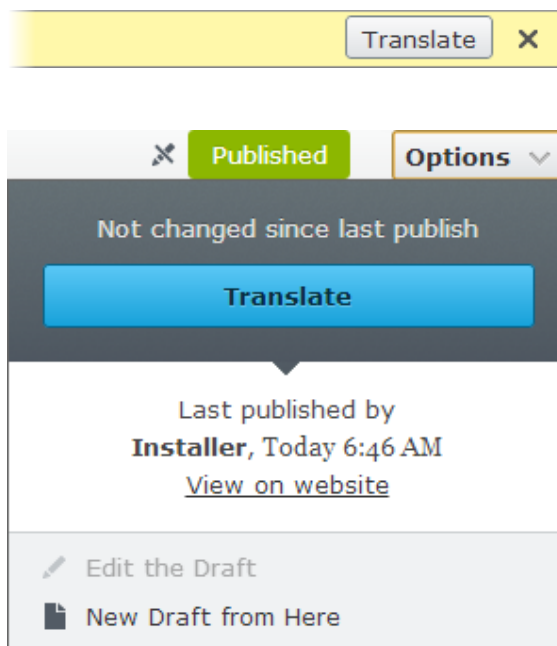


1. Create content in another language in any of the following ways:

- Select the page in the tree structure > **Translate**.



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



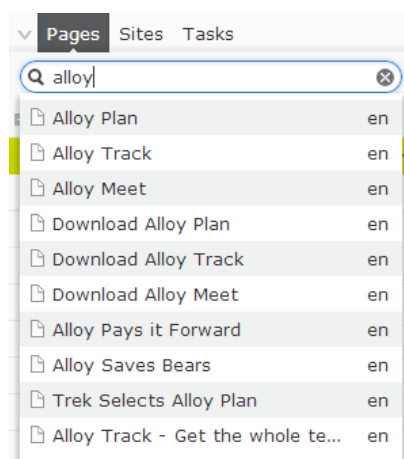
2. Edit the page and drag shared content to it as described in *Assets – Using shared content*.
3. Clicking the combo button expands a drop-down menu containing several options. These options transform according to your access rights and the content version status as described in *Saving and publishing content* and *Managing versions*. Depending of version status, the following options are available:

- Publish
- Schedule for Publish
- Remove Scheduling and Edit
- Ready to Publish
- Revert to Published
- New Draft from Here

4. *Preview* the page in each language.

### Searching for language versions

You can search for all language versions of a page or block by typing a keyword in the search box at the top of the **Pages** or **Blocks** panes. The content items that have not yet been translated will appear in the search results with a language code.



### Handling language versions

You can see a list of versions for pages or blocks and manage them from the **Versions** gadget, where you also can manage language versions.

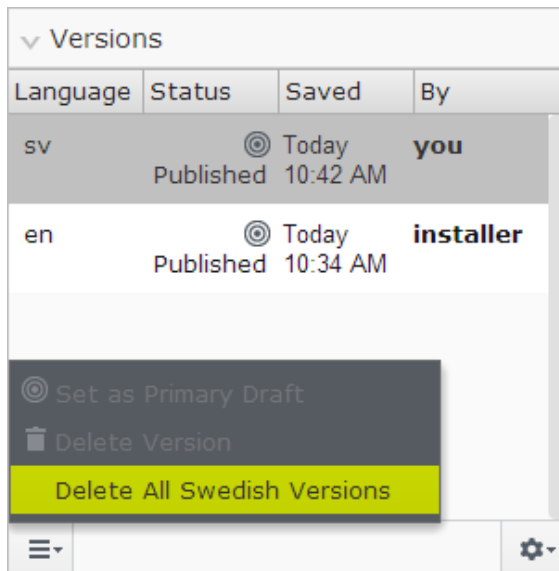
To create links to content so that the visitor is directed to the language version you have decided, see *Linking to content*.

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

For a list of available gadgets and how to add them to the dashboard or panes, see *Managing gadgets*.

### Deleting language versions

It can sometimes be necessary to delete all versions for a specific language of a page or block (without deleting the entire content in that language on the website). This can be done in the **Versions** gadget by selecting **Delete All [language] Versions**. Or, you can delete a single version by selecting **Delete Version**. Note that this action cannot be undone.



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

## Defining language settings

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

### Creating globalized content work procedure

Create globalized content in the following steps:

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

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

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

Language settings are divided into two groups:

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

The screenshot shows a 'Language Settings' window for 'Page "Start"'. It contains three sections: 'Settings for Editors' with 'Available Languages' (currently 'English'), 'Settings for Site Visitors' with 'Fallback Languages', and 'Replacement Languages'. Each section has a 'Change' button.

## Setting available languages for content

Pages can only be created in languages that are activated in admin view, and set as available in edit view in the **Language Settings** dialog. It is also possible to access and edit content which have previously been available, but are perhaps not available now.



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

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

## Setting a replacement language

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

Replacement language can be useful in the following scenarios:

- Pages exist in the first language, but you want visitors to view the content in another language, for example if old content still exists.

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



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

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

### Setting a fallback language

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

Fallback language can be useful in the following scenarios:

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



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

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

# Personalizing content

---

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

To target your content you simply select any content on a page – a block with a banner, an image, a text, or a shared block – and select which groups that are to be allowed to see it.

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.

You can watch videos about the personalization feature on *YouTube*.

## Creating personalized content work procedure

Create personalized content in the following steps:

1. The system administrator creates visitor groups. Also the administrator can set up access rights for a visitor group to a page and its files.
2. The editor selects the content to personalize, and selects visitor group. Previews the personalized content, publishes or continues to work with the personalized content. Personalize content on a page with any of the following options:
  - *Using the content area*
  - *Using the rich-text editor*
3. The system administrator can enable statistics when creating the visitor group, so that the editor can add the *Visitor Group Statistics gadget* to follow how many visitors have visited a page with personalized content.

## Personalizing content using the content area

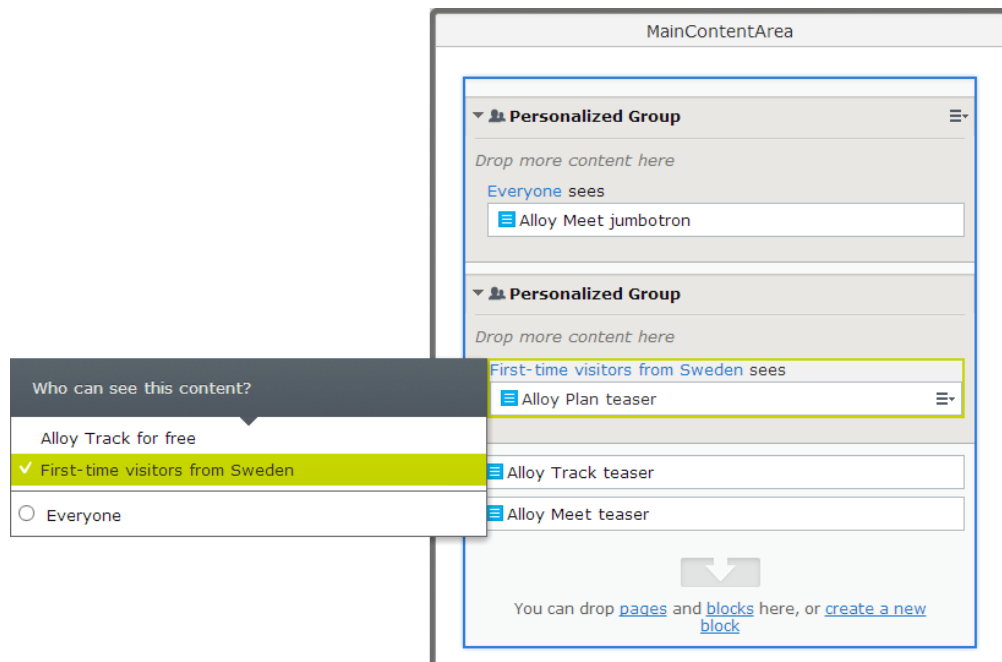
Select the content you want to personalize and select one or several visitor groups.

### Personalizing a block

Personalize a block as follows:

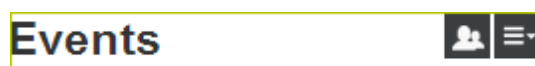
1. Create and drag the block to a page as described in *Assets – Using shared content on a page*.

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



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

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



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

### Removing personalization

In the flyout pane > **Personalized Group** section, drag the content you want to remove personalization to outside the personalized group section. Or, select the context menu > **Move Outside Group**.

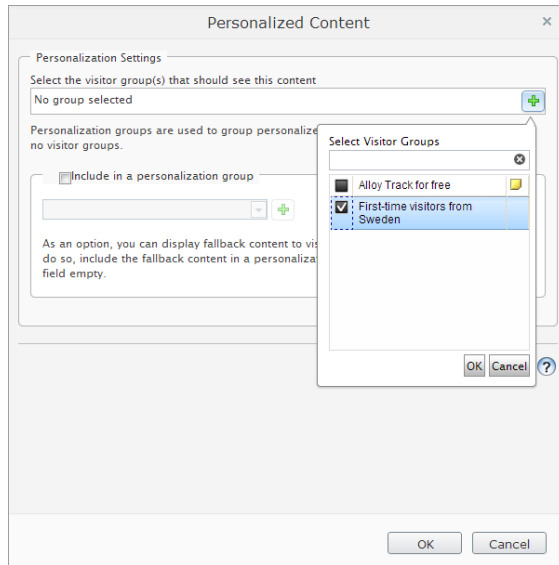


## Personalizing content using the rich-text editor

Select the piece of content in the rich-text editor you want to personalize for one or several visitor groups.

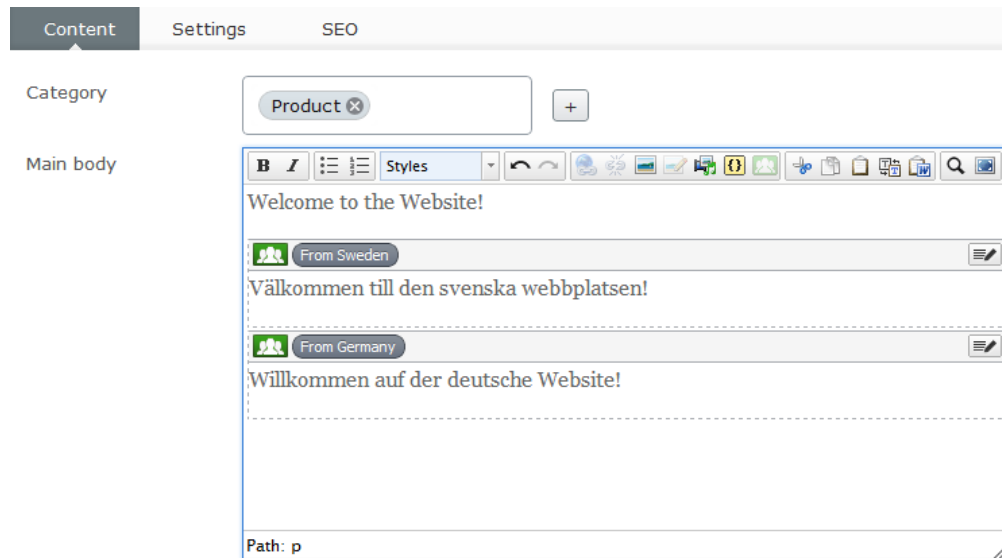
### Personalizing a page

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** button on the editor toolbar.
3. In the **Personalized Content** window and **Personalization Settings** 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. If you need fallback content, see *Grouping visitor groups*.
5. Click **OK** again. The personalized content is displayed as a box in the editor area. Note that the names of the included visitor groups are shown to the left. You can move and copy the personalized content boxes in the rich-text editor area just as you can do with

any other objects.



6. *Preview* the content as a visitor group.
7. Publish.

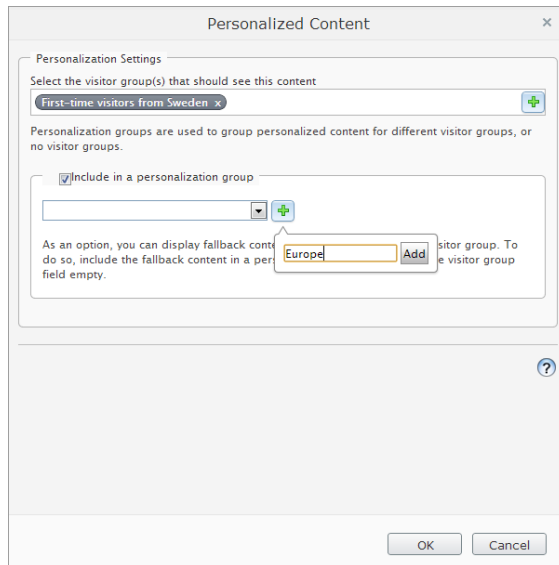
## Grouping visitor groups

If you have several visitor groups, it is possible that some individuals also are members of 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.

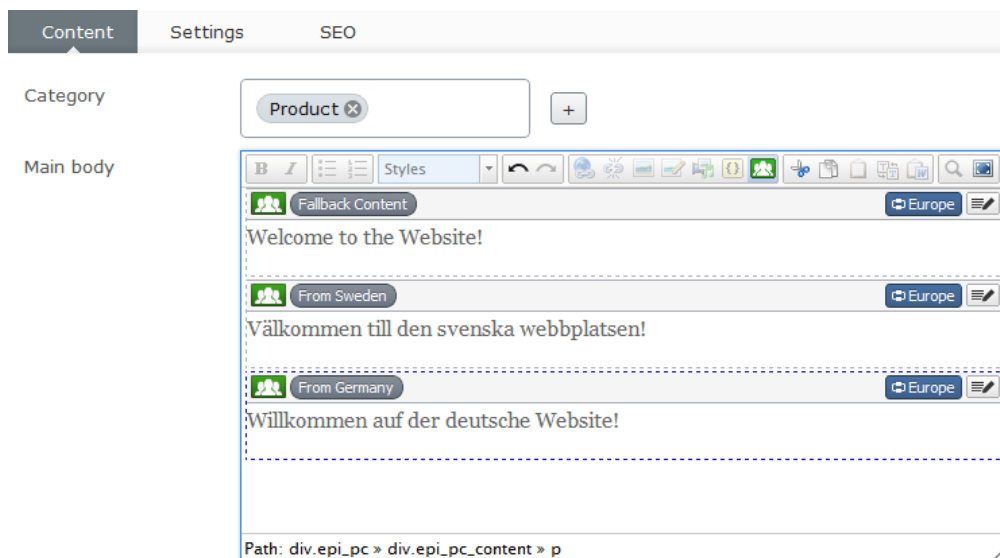
Example: Your organization wants to adapt content for visitors from Sweden and Germany, and also a piece of content to be shown by default if the visitor does not match any visitor group. If you want the content for all these visitor groups to be shown only once, you can group them by adding the personalization 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*.
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 and 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 personalization markup box in the editor area. Note that the names of the included visitor groups are shown to the left and the personalization group to the right.




- Preview the content as a visitor group.
- Publish.

## Changing personalized content

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

### Changing through the personalized content button

- Click the **Edit personalized content** toolbar button .
- Make your changes to the personalized content and click **OK**.

3. Publish.

### Changing through the personalization markup box

1. Select the personalization markup box, and click the **Personalized content** button.
2. Make your changes to the personalized content and click **OK**.
3. Publish.



**Note** Cut and copy for a personalized content box in the editor area may work differently depending on the browser you use. You may have to use either the cut and copy buttons of the editor toolbar, or the right-click cut and copy of your browser, instead of the keyboard keys. 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.

## Removing personalized content

You have the following options to remove personalization from a page:

### Removing personalization from a block

Remove personalization from a block as follows:

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



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

### Removing personalization from a page in the rich-text editor

Remove personalization from a page in the rich-text editor as follows:

1. Click the **Edit personalized content** button in the personalization markup box that you want to delete.
2. Click the **Remove Personalization** button. The content will on the page
3. Publish.



**Tip** You can remove both personalization markup and the content within it on the page by selecting the personalization markup box in the rich-text editor and pressing **Delete** on your keyboard.

## Personalizing content using access rights

**Consider this feature as advanced usage.**

The system administrator can apply access rights on an entire page to be shown for selected visitor groups.

## Using forms

Creating web forms is a popular and frequently used feature on websites, for example, a simple web poll, a registration for an event or a questionnaire.

In the sample site and templates, the forms functionality is made available through a block, which means that the entire setup for a specific form can easily be reused on different web pages through drag-and-drop operations. Your website might have been customized with a form page type implemented by the partner developer.

The screenshot shows a web form titled "Fall Campaign" in a previewing mode. The form is contained within a browser window. At the top of the window, there's a toolbar with icons for editing, previewing, and a "Previewing" label. Below the toolbar, the breadcrumb "Start > Campaigns > Fall Campaign" is visible, along with a status "No changes to publish" and an "Options" dropdown. The form itself has the following elements:

- A label "Your name:" followed by a text input field.
- A label "Your email address:" followed by a text input field.
- A label "What would you like to learn more about?" followed by a list of checkboxes:
  - ☐ Alloy Plan
  - ☐ Alloy Meet
  - ☐ Alloy Track
  - ☐ Book an online demo
  - ☐ Pricing
  - ☐ Our support
- A label "Message to us:" followed by a text input field.
- A "Submit" button at the bottom.

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 the website are collated in a structure.

## Administering forms

Under the **Content** tab in *all properties editing view*, you will find the **Form** property, which provides access to the full web forms editing features of EPiServer CMS. Here you can use existing forms, or create new forms, to be used in the forms block.

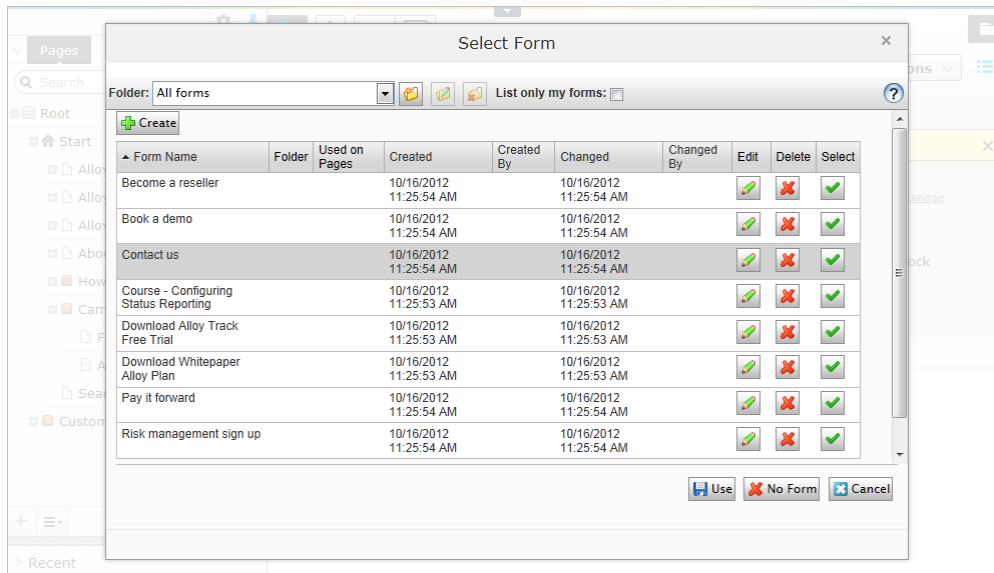
Forms are administered in the **Select Form** dialog, which is where it is possible to build a folder structure to more easily structure all forms on the website.

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

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

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

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



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

## Building up a form

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

The following tabs are used to create your form:

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

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

## Creating a form block

The screenshot shows a dialog box titled "Alloy Plan" with a "Create" button and a "Cancel" button. Below the title bar is a section labeled "Additional properties". Inside this section, there are three rows: "Category" with a dropdown menu showing "Alloy Plan" and a "+" button; "Heading" with a text input field containing "Contact us"; and "Form" with a button labeled "Click the button to edit" and a three-dot menu button.

Create a form block and drag it to a page as follows:

1. *Create a new block* based on the **Form** block type.
2. In **Heading**, type a name for the form.
3. In **Form**, browse the form you want to use in the block.
4. In the **Select Form** dialog you can choose to **Select** or **Edit** an existing form, or **Create** an entirely new form.
5. Click **Create** to create the form block.
6. When you are done, you can drag the block to the page and publish it.
7. *View statistics and export form data.*

## Creating and editing a form

Create and edit a form as follows:

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 that you can use this form on another page.
2. In **Form folder**, select in which folder to save the form.
3. Select **Form can be sent without logging in** if you want any visitor to your website to be able to post the form. This option is left blank by default, which means that a visitor will be prompted to log in.
4. Select the **Same person can send the form several times** if you want the same person (computer user) to be able to post the form several times. This option is left blank by default, which means that a visitor will only be able to post the form once per computer (a cookie is placed on the visitor's computer).

5. In **Page shown after the form has been sent**, you can point to a page that will be shown when a visitor submits a form, most common a “thank you” page. This page should be based on the **Standard page** template.

## About the form field types

When creating or editing a form, you add 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' window. At the top, there are buttons for 'Save', 'Save and Close', 'Save as ...', 'Delete', and 'Cancel'. Below these are form configuration options: 'Name of form' (Contact us), 'Form folder' (No folder), and 'Page shown after the form has been sent' (Thank you [37]). 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 the form with fields for 'Your name:', 'Your email address:', a list of topics to learn more about, and a 'Message to us:' text area. On the right, the 'Properties for text box' panel is open, showing settings for a text field: Name (Email), Heading (Your email address:), ToolTip, Width (50), Value must be entered (checked), CSS class, and Validate as (E-mail address).

The following properties exist for most form fields:

- **CSS class.** Defines a CSS class (format) for the field. The class must exist in the CSS file used for the website. Contact your system administrator for more information.
- **Name.** Used to identify the field in the database and is compulsory, but is not visible to visitors. It is easiest if you use the same name or a similar name to the one you use in the **Heading** field. You can only use A-Z, a-z, 1-9 and \_ for this field. Spaces cannot be used.
- **Heading.** Used to let visitors know what they should enter in each field. Headings can either be created in a field of their own or in conjunction with the form field in question, depending on where you want the heading to be placed and how accessible you want the form to be. If you enter a heading in conjunction with the form field, it will be displayed to the left of the field. This alternative should be selected to make the form as accessible as possible.



- **ToolTip**. Gives visitors more information about what should be filled in. The tooltip appears when you place the cursor over the form field.
- **Value must be entered**. Select this check box if you want to force the visitor to enter a value. If the check box is not selected, an error message will appear saying that the field must be filled in. The error message refers primarily to the **Heading** in the field. If you do not have a heading, it refers to whatever you have entered in the **Name** field.
- **Validate as**. Used to check whether the visitor has filled in the right type of information in a field. You can for example check whether it is an e-mail address, check a date format or various types of numbers.

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

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

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

### Recommended usage

- **Text box**. Use the text box field type for visitors to type short text information as a row.
  - In the **Width**, 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 the 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. You can send e-mail to several recipients by entering the e-mail addresses separated by commas, for example, david@company.com,helen@company.com,eve@company.com.
  - In **E-mail address of sender**, type the sender's address that should be in the message sent.
  - In **E-mail subject**, type the heading text that is to be shown in the subject box in the message that is sent when a visitor sends a form.
  - In **Send to specified URL**, type the web address where you want the information to be sent.
- **Heading.** Use the 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 the horizontal rule if you want to insert a horizontal rule into the form, for example, to improve the design of the formal rule.

## Viewing and exporting form data

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

Content Settings SEO

Category  +

Main body

Page property

From page: Contact us! [65] Property: Main body

Path:

Form  ... [View data](#)

Show statistics ☒

Select the **View data** option to access and export data for a form. Note that the data displayed for a form will be collected from all pages where this specific forms block has been used.

View Form Data

Forms > Contact us

From date

To date

Results per page

1 match(es)

| Select all                          | DatePosted            | User | Name       | Email          | AreaofInterest                  | Message            |
|-------------------------------------|-----------------------|------|------------|----------------|---------------------------------|--------------------|
| <input checked="" type="checkbox"/> | 10/16/2012 3:06:46 PM | anfi | John Smith | john@email.com | Alloy Plan, Alloy Meet, Pricing | Please contact me. |

Retrieve form data from the database as follows:

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

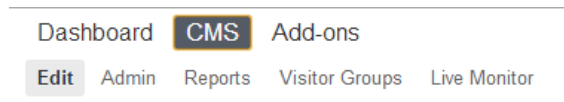
The search hits are listed below the search form. If there are a lot of hits, you can browse amongst them here and you can also delete postings.

- To delete certain postings from the form data, select the postings to be deleted and click **Delete Selected Postings**.

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

# Reports

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



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

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

## Not Published Pages

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

Create a report as follows:

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

2. In the **Search start page** field, browse to the page in the tree structure that you want to be the starting point for the search. This start page will also be included in the search.
3. It is possible to restrict your search to pages that have status **Ready to Publish** by selecting **Yes** or **No** in the **Ready to publish?** field.
4. Select the **Last changed by me** check box if you only want to search for pages that you have last changed.
5. In **Language**, 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 view by clicking the page name in the Page Name column.

## Published Pages

This report displays pages published within a certain time span.

**EPISERVER**

▼ 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:  –

Search start page:

Published by me: ☐

Language:

[Show Report](#)

Number of Hits: 12      Number of items per page:

| Page Name  | ▲ Publication Date | Publication Stopped | Last Changed | Changed By | Language | Page Type     |
|--|--------------------|---------------------|--------------|------------|----------|---------------|
| <a href="#">Thank you</a>  | 10/1/2012          |                     | 10/30/2012   |            | en       | StandardPage  |
| <a href="#">Search</a>   | 10/2/2012          |                     | 10/30/2012   |            | en       | SearchPage    |
| <a href="#">Events</a>   | 10/2/2012          |                     | 10/30/2012   |            | en       | NewsPage      |
| <a href="#">Risk Management</a>  | 10/2/2012          |                     | 10/30/2012   |            | en       | StandardPage  |
| <a href="#">Collaboration Made Simple</a>                                | 10/3/2012          |                     | 10/30/2012   |            | en       | StandardPage  |
| <a href="#">Thank you</a>  | 10/3/2012          |                     | 10/30/2012   |            | en       | StandardPage  |
| <a href="#">Reporting Made Simple</a>                                    | 10/4/2012          |                     | 10/30/2012   |            | en       | StandardPage  |
| <a href="#">Book a demo</a>  | 10/9/2012          |                     | 10/30/2012   |            | en       | StandardPage  |
| <a href="#">Alloy Track - Get the whole team involved in the project</a> | 10/10/2012         |                     | 10/30/2012   |            | en       | LandingPage   |
| <a href="#">Campaigns</a>  | 10/10/2012         |                     | 10/30/2012   |            | en       | ContainerPage |

1 2

Create a report as follows:

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

4. In **Language**, 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 view 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**

▼ 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: 2012-10-24 00:00 – 2012-10-31 00:00

Search start page: Start [4]

Last changed by me: ☐

Language: All

**Show Report**

Number of Hits: 43      Number of items per page: 10

| Page Name                            | Last Changed | Changed By | Language | Page Type    |
|--------------------------------------|--------------|------------|----------|--------------|
| <a href="#">Alloy Plan</a>           | 10/30/2012   |            | en       | ProductPage  |
| <a href="#">Download Alloy Plan</a>  | 10/30/2012   |            | en       | StandardPage |
| <a href="#">Installing</a>           | 10/30/2012   |            | en       | StandardPage |
| <a href="#">Alloy Track</a>          | 10/30/2012   |            | en       | ProductPage  |
| <a href="#">Download Alloy Track</a> | 10/30/2012   |            | en       | StandardPage |
| <a href="#">Installing</a>           | 10/30/2012   |            | en       | StandardPage |
| <a href="#">Whitepaper</a>           | 10/30/2012   |            | en       | StandardPage |
| <a href="#">Alloy Meet</a>           | 10/30/2012   |            | en       | ProductPage  |
| <a href="#">Download Alloy Meet</a>  | 10/30/2012   |            | en       | StandardPage |
| <a href="#">Installing</a>           | 10/30/2012   |            | en       | StandardPage |

1 2 3 4 5

Create a report as follows:

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

## Expired Pages

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

Create a report as follows:

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

## Simple Addresses

This report displays published pages that have a simple address.




**EPISERVER**

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


## 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:  

Language:  ▼

 **Show Report**

Number of Hits: 0

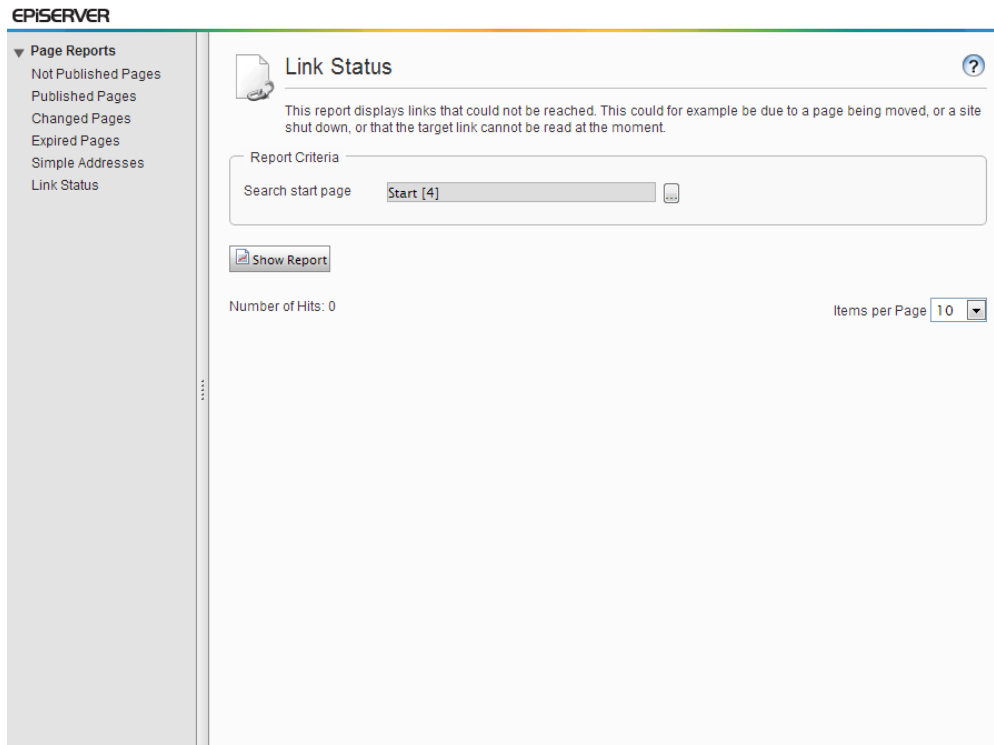
Number of items per page:  ▼

Create a report as follows:

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

## Link Status

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



Create a report as follows:

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

# Using workflows

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

## Out-of-the-box workflows

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

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

## Starting point in the workflow

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

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

## Starting a workflow manually

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

Start a workflow manually as follows:

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



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



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

Start a Workflow

Approval Workflow for Page About us

Select users/groups that should approve

Add Users/Groups

| Name    | Group | Required                            | Delete |
|---------|-------|-------------------------------------|--------|
| editor1 | No    | <input checked="" type="checkbox"/> |        |
| editor2 | No    | <input checked="" type="checkbox"/> |        |

Select minimum number that has to approve

1

Description for approvers

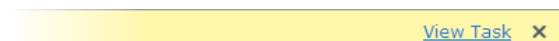
Hi, I would like you to approve my changes for publication.

StartClose

## Handling your assigned tasks

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

To read the message in the task, click **View Task** on the notification bar.

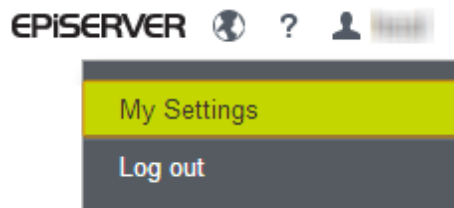


When you are done with reviewing the page, publish the changes.

## Customizing user interface settings

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

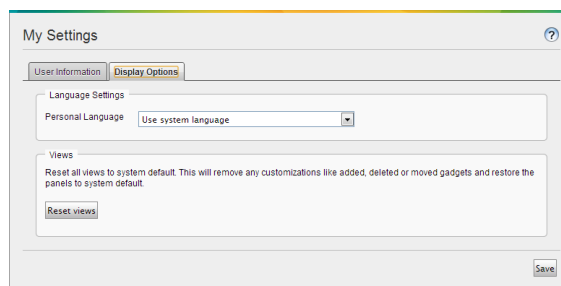
Under **My Settings** you manage the user information options and the display settings for the user interface. To access these options, select **My Settings** under **Administrator** in the upper right corner of the top menu.



### User Information

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

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



### Display Options

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

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

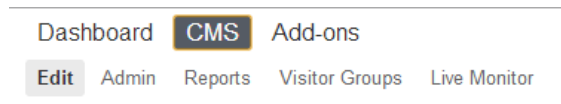
Under **Views** you can remove your personalized settings and reset to the default system settings by clicking **Reset views**.

# EPiServer platform

## Introduction

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

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



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

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

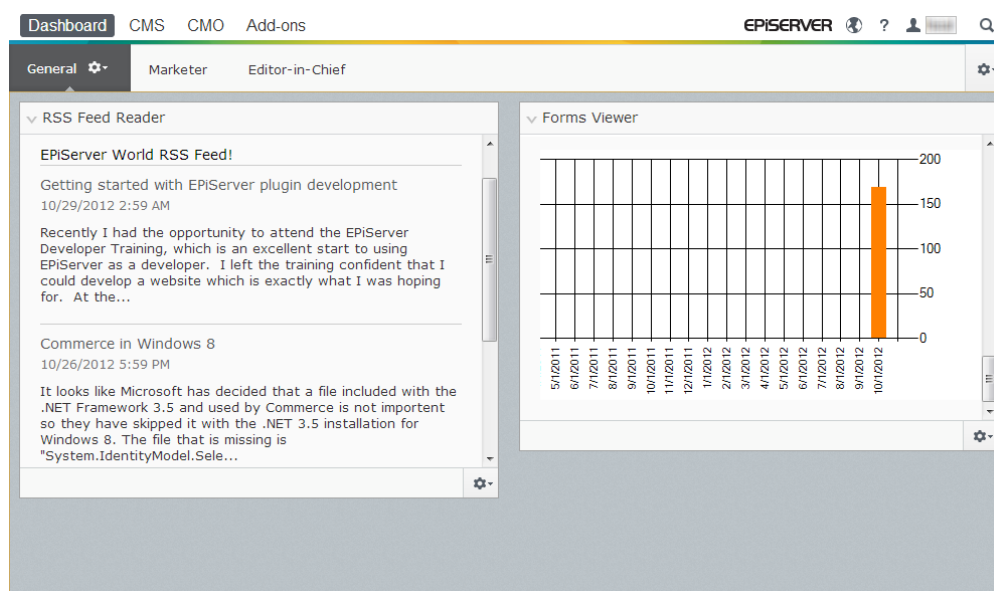


The upper right part of the global menu holds the following options:

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

## Dashboard

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



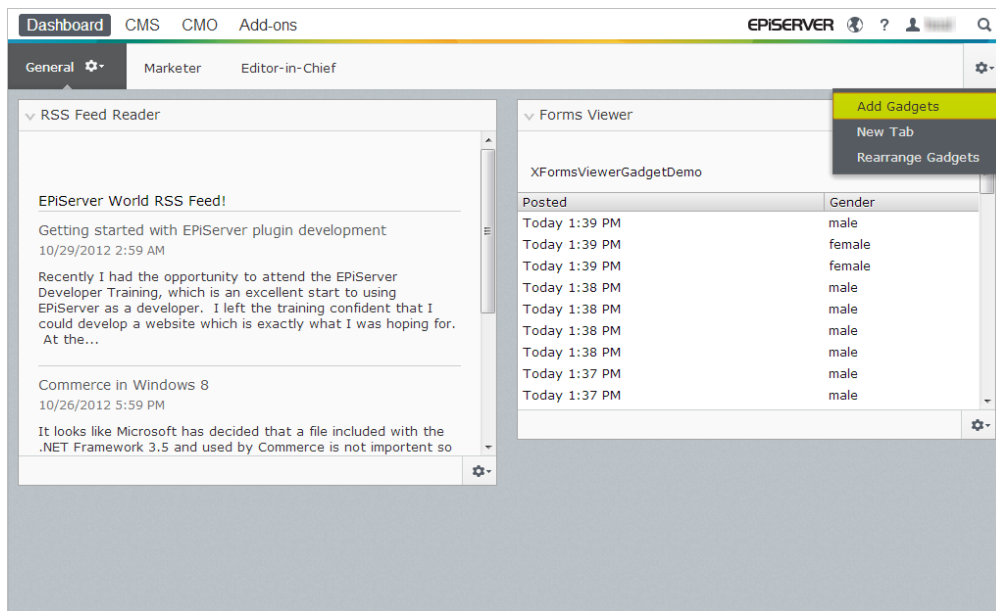
When logging in to the website, the dashboard can be accessed by selecting **Go to my Dashboard** in the EPiServer log in dialog, or from the **Dashboard** option in the global menu.

You can do the following when working with the dashboard:

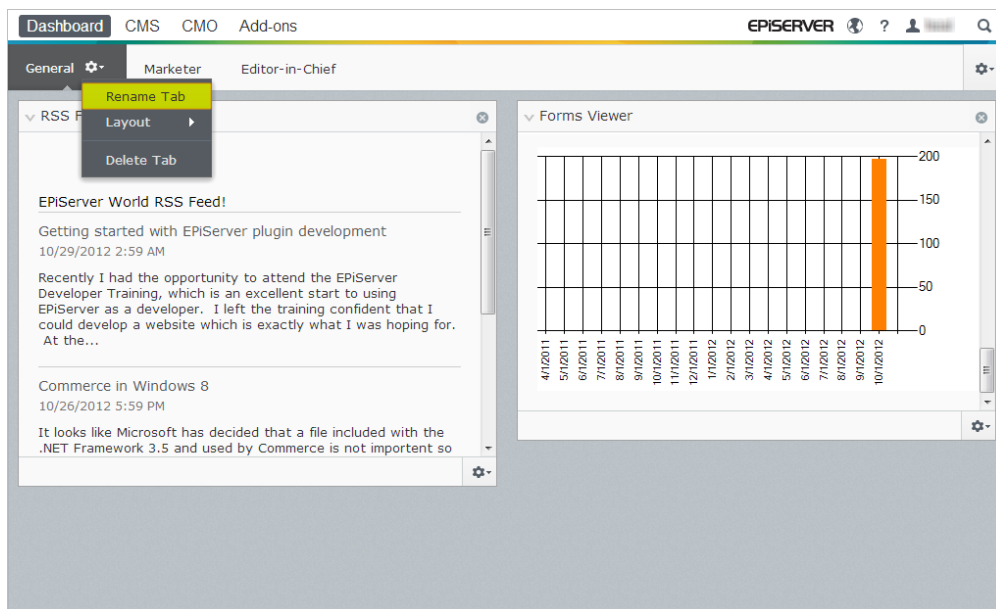
- **Organizing the dashboard.** Adding, editing and deleting tabs and columns. You can divide the layout of the dashboard tabs into one, two or three columns, depending on your choice.
- **Gadgets.** Organizing gadgets in columns and under tabs. Adding, editing and deleting gadgets, see *Gadgets*.

## Tabs

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



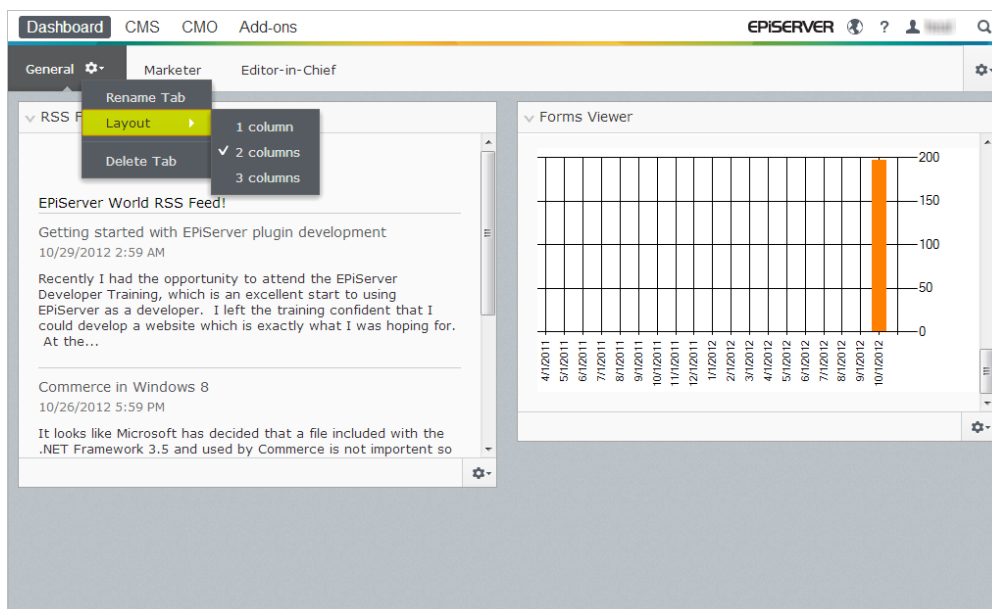
## Creating Tabs



Add a new tab on the dashboard as follows:

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





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

## Editing Tabs

Edit a tab on the dashboard as follows:

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

## Deleting Tabs

Delete a tab from the dashboard as follows:

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



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

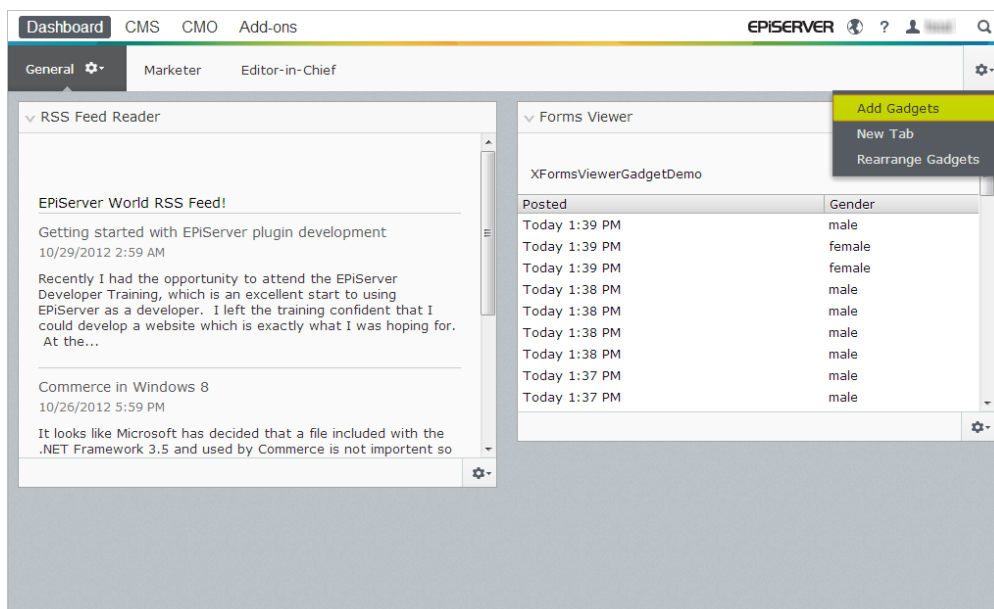
## Gadgets

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

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

You have the following options:

## Customizing your gadget settings



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



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





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



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

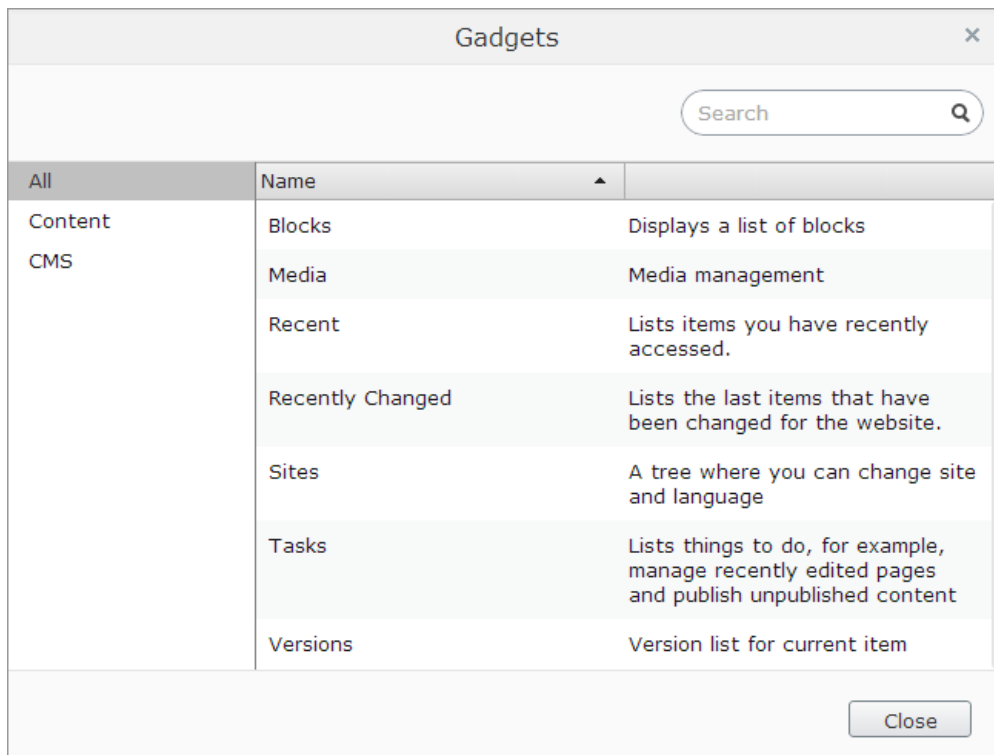


**Toggle minimize and maximize gadget.** Click  to minimize and  to maximize the gadget.



**Remove.** Click to remove a gadget.

## Adding a gadget



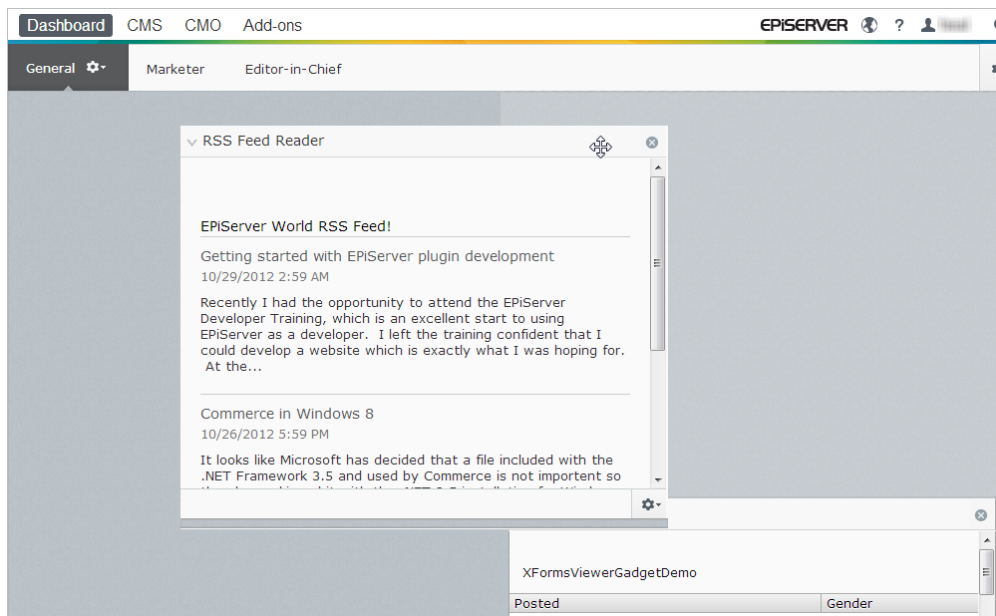
Add a gadget to the pane as follows:

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

### Moving a gadget

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

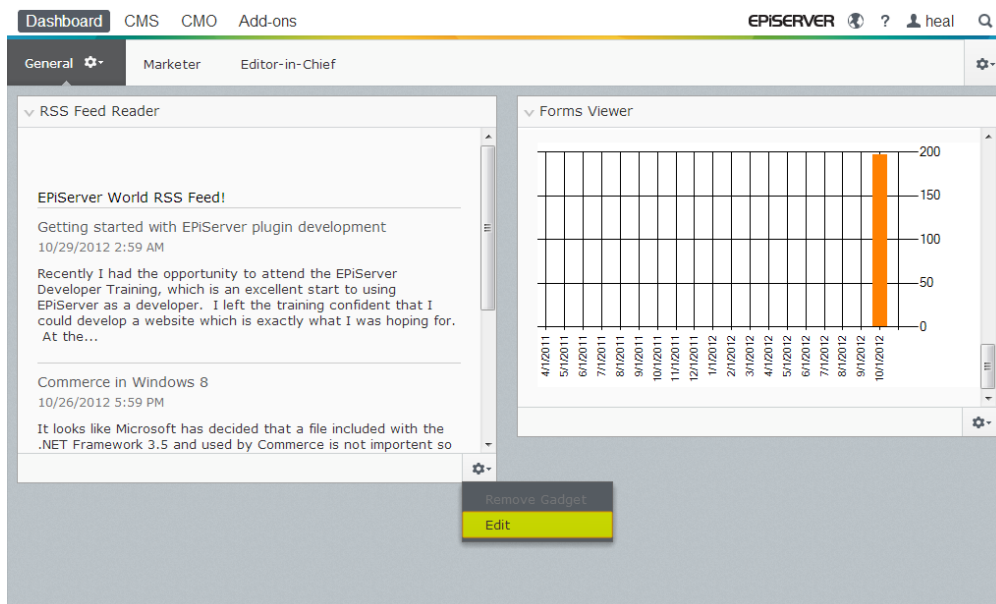
The dashboard is organized into columns, and gadgets can be moved up and down in a column, and between columns.



Move a gadget on the dashboard and panes as follows:

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

## Editing a gadget

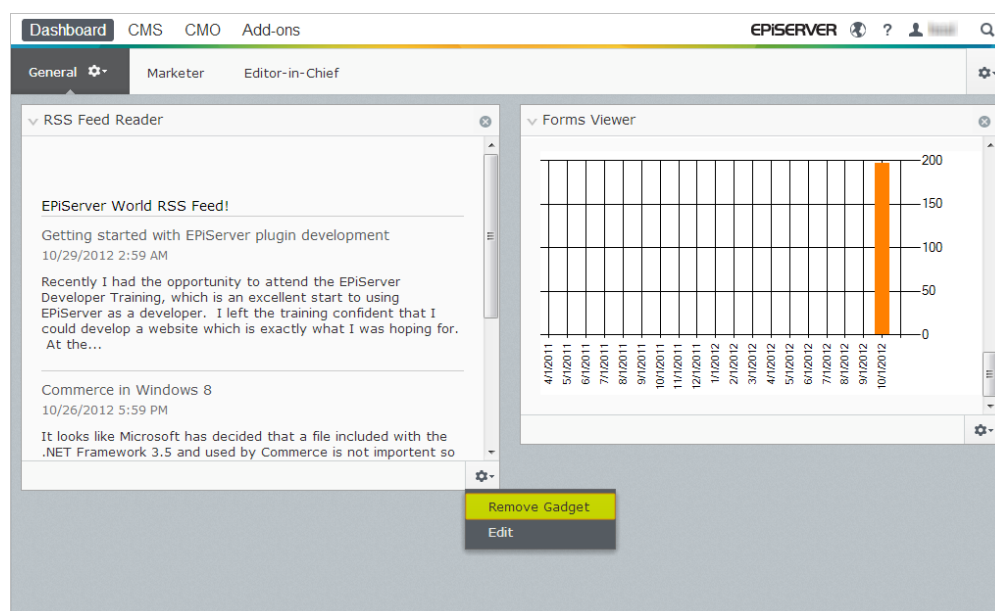


Edit a gadget as follows:


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

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

## Removing a gadget



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

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

## Out-of-the-box gadgets

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

### Gadgets on the dashboard

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

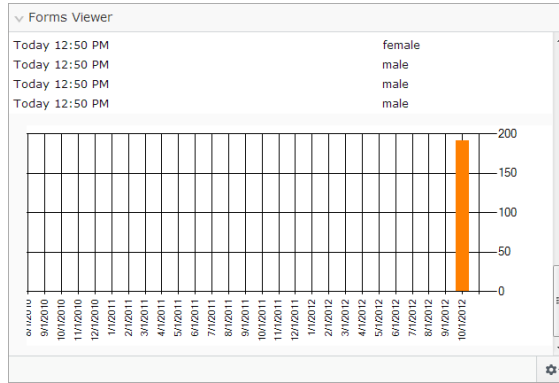
#### Forms Viewer

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

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

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

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



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

The screenshot shows the 'Forms Viewer' settings dialog box. It contains the following sections and options:

- Settings**
  - ☒ **Demo mode**
  - Select form**: XFormsViewerGadgetDemo (dropdown)
  - Fields to view**
    - ☐ Name
    - ☐ Phone
    - ☒ Gender
  - Number of items to display**: 50 (text input)
  - ☒ **Display item post date**
  - Chart settings**
    - ☒ **Display chart**
    - Chart periodicity**: Per month (dropdown)
  - Automatically update**: Often (every 60 seconds) (dropdown)
- Buttons**: OK, Cancel

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

## External Links

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

Add external links as follows:

When adding external links, you can select the number of items to display in the list. The list will display the number of pages that contains one or several links to each external web address.

You can also choose to see a more detailed item list by selecting **Show details**. This option will display the full URL for each link.

The screenshot shows a dialog box titled "External Links". Inside, there is a "Settings" section with a checked checkbox for "Show details" and a "Number of items to display" dropdown menu set to "20". At the bottom right are "OK" and "Cancel" buttons. A small gear icon is visible in the bottom right corner of the dialog box.

## Notes

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

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

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

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

The screenshot shows a dialog box titled "Notes". Inside, there is a "Settings" section with a "Text Size" dropdown menu set to "Normal" and a "Background Color" dropdown menu set to "Pink". At the bottom right are "OK" and "Cancel" buttons. A small gear icon is visible in the bottom right corner of the dialog box.

## RSS Feed Reader

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

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

The screenshot shows the "RSS Feed Reader" gadget. It displays a list of RSS feeds. The first feed is titled "EPiServer World RSS Feed!" and contains the text "Getting started with EPiServer plugin development" dated "10/29/2012 2:59 AM". The second feed is titled "Commerce in Windows 8" and contains the text "It looks like Microsoft has decided that a file included with the .NET Framework 3.5 and used by Commerce is not important so they have skipped it with the .NET 3.5 installation for Windows 8. The file that is missing is 'System.IdentityModel.Sele..." dated "10/26/2012 5:59 PM". A vertical scrollbar is visible on the right side of the feed list. A small gear icon is visible in the bottom right corner of the gadget.

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


## Visitor Groups Statistics

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

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

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

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

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



## EPiServer CMS-specific gadgets

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

### Pages

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

### Sites

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

### Tasks

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

### Blocks

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

### Media

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

### Versions

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

### Recent

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

### Recently Changed

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

## Search

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

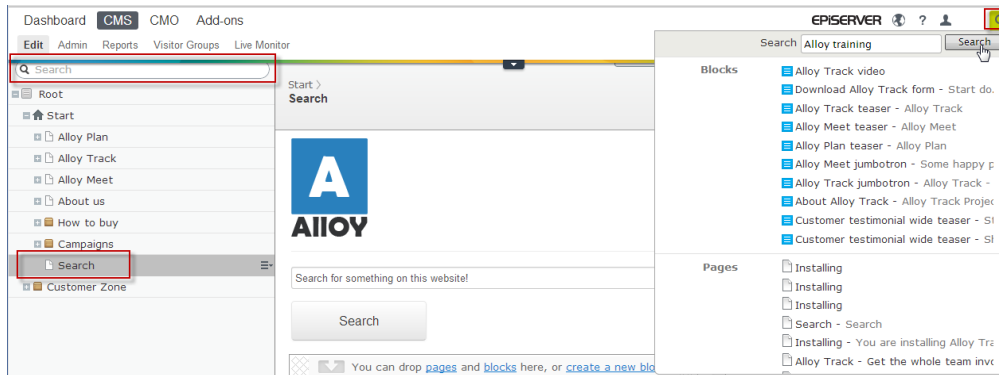
The search service in EPiServer is based on the open source search engine Lucene. The service is pluggable which means that Lucene can be replaced by another search provider. The search functionality can be extended using EPiServer Find to build more advanced features such as filtering and faceted navigation.

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

### Search options

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

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



## Search tips

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

## Displaying search results

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

## Configuring search

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

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

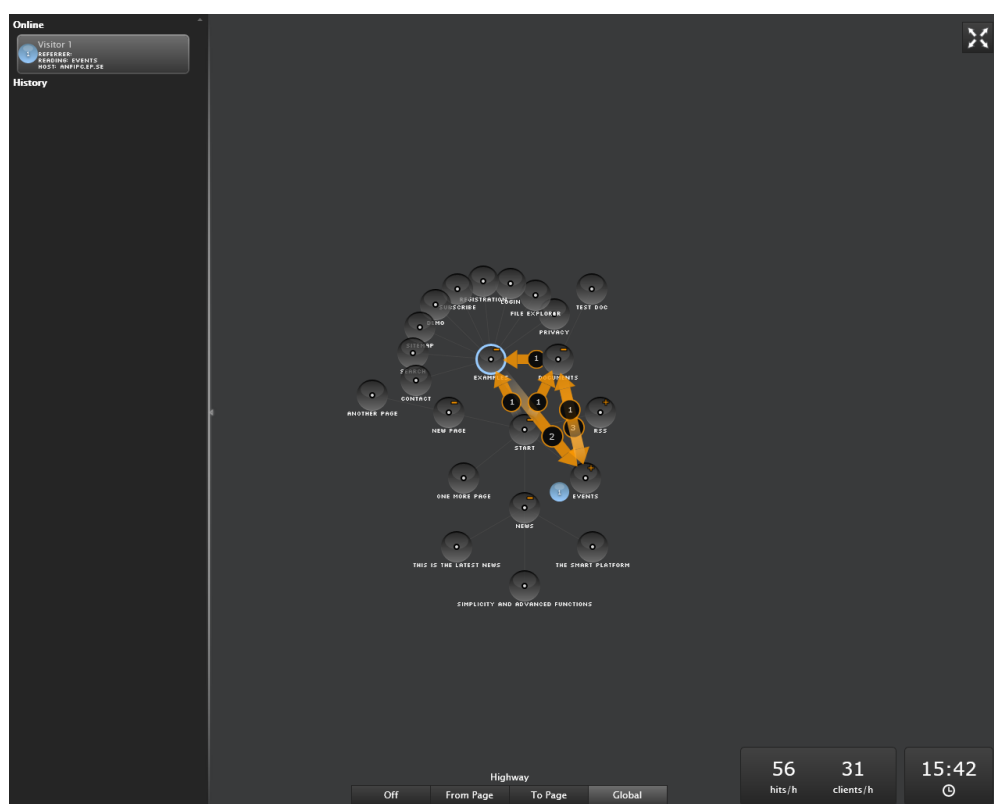
When installing the sample site, Lucene will be the default search provider installed. To find out more about Lucene, refer to the official Lucene website.

## Live Monitor

**Live Monitor** is used by EPiServer CMS to visualize the current traffic on the website.

Live Monitor monitors the traffic to your website and follows the behavior of visitors, making your website activity easily available to the organization.

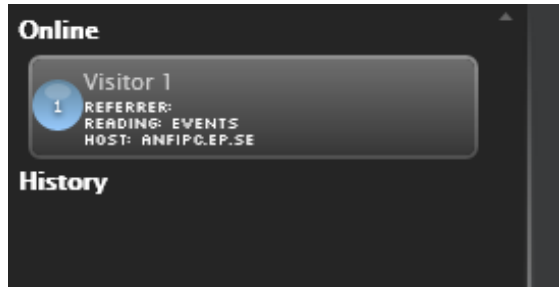
With Live Monitor you can see potential customers and partners that are visiting your website. Using "highways" you can analyze the traffic on your website and adapt the communication accordingly.



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

- Website structure.** The main part of the Live Monitor user interface shows the structure of the EPiServer CMS website. Click on the circles to expand the structure and see how many visitors are currently viewing a certain page that is stored deep in the structure of the website. Activity on the subpages in the website can be viewed by double-clicking the node (page) in question to expand (or collapse) the structure.

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



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

## Accessing Live Monitor on your website

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

## Viewing highways

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

## Viewing and hiding global highways

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

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

## Viewing highways to or from a certain part of the website

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

## Viewing traffic statistics

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

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

## Displaying Live Monitor in full screen



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

