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Introduction

The features and functionality of the entire Episerver platform are described in an online help that opens in a web browser. The online help covers CMS for content management, Commerce for e-commerce functionality, Find for extended search, and Episerver add-ons. It is either accessed from within the Episerver platform or from Episerver World. The online help is also divided into a number of PDFs for users who prefer those or want to print the documentation.

This PDF describes the features and functionality of Episerver CMS. PDFs for Episerver Commerce and Find can be found on Episerver World. The user documentation is intended for editors, administrators, marketers and merchandisers, working with tasks as described in Roles and tasks.

Features, licenses and releases

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

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

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

Add-ons extend the Episerver capabilities with features like advanced search, multivariate testing, and social media integration. Some add-ons are free, others require
license activation. Add-ons by Episerver are described in the online help.

Due to frequent feature releases, this user guide may describe functionality that is not yet available on your website. Refer to What’s new to find out in which area and release a specific feature became available.

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What's new

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

This user guide describes **features added up until and including update 105** for Episerver. Refer to Episerver World for previous user guide versions.

<table>
<thead>
<tr>
<th>Area</th>
<th>Features and updates</th>
</tr>
</thead>
</table>
| CMS        | ›› The user interface now displays comments and changes to projects immediately (update 100). **Note**: The feature requires WebSocket support on the web server. If this has not been enabled by an administrator, you may see a Real-time Updates dialog box. See Real-time Updates in the User interface topic in the CMS Editor user guide for more information.  
›› The CMS user interface has been rebranded and a number of images in this user guide have been updated (update 100).                                                                                                                                 |
| Commerce   | ›› Updates to the new Campaigns feature. **Note**: This is still in Beta and cannot be used in parallel with the legacy Campaigns user interface.  
›› You can prevent a discount from being combined with other discounts, all discounts in one more campaigns, or all other discounts (update 100).  
›› You can assign a promotion code (also known as a coupon) to a discount. Users must supply the promotion code to qualify for the discount (update 100).  
›› Enhancements to searching and browsing for orders in Commerce Manager (update 102).                                                                                                                                 |
| Addons     | ›› A demo video has been added to Example: Creating an email sign up form.                                                                                                                                 |
Getting started

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

Logging in

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

Accessing features

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

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

Navigation

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

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

Refer to the sections below for more information.

- User interface and Roles and tasks in the CMS Editor User Guide for information about the Episerver user interface and roles.
- Managing content in the CMS Editor User Guide for information on how to create and publish content.
- Administration interface in the CMS Administrator User Guide for information on how to administer and configure settings in Episerver.
- Commerce User Guide for information on how to work with e-commerce tasks, if you have Episerver Commerce installed.
- Find User Guide for information on how to work with search optimization, if you have Episerver Find installed.
- Add-ons section in the online help for information on how to use add-ons from Episerver, if you have any of these installed.

Roles and tasks

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

Visitor

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

Community member

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

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

Marketer

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

Merchandiser

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

Website owner

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

Administrator

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

Developer

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

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

Administration view

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

Visitor groups

Visitor groups are used by the personalization feature, and are managed from the Visitor Groups option in the global menu. You need administration access rights to manage visitor groups.
More on administration

**Commerce** Administration in Commerce

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

**Addons** Administration in Find

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

By using access rights in Episerver, you can control availability of website content to visitors, as well as what editors can do and where they can do it in the content structure. Only content that visitors have access to is visible; unauthorized content is hidden. You can set access rights for different types of content, such as pages and blocks, and images and documents in asset folders.

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

Access rights for views and features

A standard installation of Episerver has a set of built-in user groups and roles used when controlling access to the different views and features in Episerver and related products. Predefined groups and roles can be easily extended based on your organization and website structure.

The membership and role providers available for your website need to be configured to use the built-in groups and roles in Episerver. This is typically done during development when the website is set up.
### Default group | Description
---|---
**Administrators** | Used by Windows and is defined when the website is created. An administrator has, by default, access to all parts of the system, and can edit all website content. Often, administrators are developers setting up or maintaining the website.

**WebAdmins** | Provides access to both the admin and edit views, as well as the administration interfaces for add-ons and visitor groups. Membership in WebAdmins does **not** provide editing access in the content structure by default. In most cases, only a few system administrators or “super users” belong to this group.

**WebEditors** | Provides access to the editing view, and membership here is required to access editing functionality. For editors, **membership in a structure group** is also needed to be able to edit content. On large websites, editors are often organized in groups according to content structure or languages.

**Everyone** | Used by Windows and provides “anonymous” visitors with read access to website content. All unregistered visitors to a public website are anonymous, meaning that
Default group | Description
---|---
| they cannot be identified by the system. Removing access rights for the “Everyone” group, requires login to access content even if it is published.

**Visitor groups**

*Visitor groups* are used by the personalization feature, and administration access rights are required to manage visitor groups. If you want an editor to manage visitor groups without providing access to the entire admin view, you can make the editor a member of *VisitorGroupAdmins*. This group provides access only to the *Visitor Groups* option in the global menu.

**Add-ons**

Add-ons are plug-ins for extending Episerver functionality, and administration access rights are required to manage add-ons. If you want a user to be able to manage add-ons without providing access to the entire admin view, make the editor a member of *PackagingAdmins*. This group provides access only to the *Add-ons* option in the global menu.

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

**Languages**

If your website has content in multiple languages, you can define access levels for languages so editors can only create content in languages to which they have access. Refer to *Configuring website languages* for more information.

**Access rights in the content structure**

In addition to adding users to user groups to provide access to features and views, it is recommended to work with structure groups to control access to the content, such as pages, blocks and media folders. Refer to *Access rights in the content structure* to find out more.

**More on access rights**

**Commerce**  Access rights for Commerce

If you have Episerver Commerce installed on your website, refer to the Commerce access rights section in the Commerce User Guide for more information about access rights.
Addons  Access rights for Find

If you have added Episerver Find to your website, refer to the Find access rights section in the Find User Guide for more information about access rights.

CMS  Managing users and user groups

For easier and safer maintenance, it is recommended to base access rights on user groups rather than individual users.

You have the following options for administering user credentials:

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

The first option is most often used by smaller organizations with few editors, whereas the other options apply to large organizations with many editors. You can also combine these options.

Users and groups created in the Episerver CMS admin view are only available from here, they are not accessible from Windows. Users created in Windows cannot be added to groups created in Episerver. See the technical documentation on Episerver World for more information on how to work with membership and role providers.

Creating and deleting groups in CMS

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

Click Add to create a user group, enter a name, and save your changes.
Click **Delete** to delete a user group. Note that you can only delete user groups created from CMS. Deleting a user group cannot be undone.

It is not possible to change the name of an existing group. Instead, delete the group and add a new one.

**Creating, editing and deleting users**

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

1. On the **Admin** tab, select **Create User**.
2. For the account to work, a user name, password and email address must be specified and the account must be set to "Active".
3. Select the **user groups** the user should belong to.
4. Under the **Display Options** tab, you can specify a default language for the user interface (optional) and touch support.
5. Save the settings.
To edit user settings, search for the user under Search User/Group and then click a user name. Properties can only be modified for users that have been created via self-registration or via Create User in CMS.

To delete a user, search for the user under Search User/Group, click a user name to edit the settings, and click Delete. Note that deleting a user cannot be undone.
Displaying members of a user group

Use the Search User/Group option to display groups, and click the desired group name to see members.

CMS Access rights in the content structure

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

Structure-based groups

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

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

To gain access to the edit view, all editors must be members of the default group WebEditors. Editors can then be added to various structure groups, depending on their work tasks. See Managing users and user groups for more information.

Setting access rights

By default, access rights are inherited in the content structure. This behavior inherits settings from the closest parent item, applies them to all subitems, and clears existing settings for all items that have inheritance set. All subitems have the same settings as their closest parent item until changed.

To change this, deselect the Inherit settings from parent item option, add the desired user groups or users, and set the desired access rights.

Select one or more of the following options:

<table>
<thead>
<tr>
<th>Access right</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Read</td>
<td>Read means the group/user can read the current content.</td>
</tr>
<tr>
<td>Create</td>
<td>Create means the group/user can create content under the current content.</td>
</tr>
<tr>
<td>Change</td>
<td>Change means the group/user can edit the current content.</td>
</tr>
<tr>
<td>Access right</td>
<td>Description</td>
</tr>
<tr>
<td>--------------</td>
<td>-------------</td>
</tr>
<tr>
<td>Delete</td>
<td>Delete means the group/user can delete the current content.</td>
</tr>
<tr>
<td>Publish</td>
<td>Publish means the group/user can publish the current content.</td>
</tr>
<tr>
<td>Administer</td>
<td>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 does not provide access to admin view (for this you need to be a member of the WebAdmins group).</td>
</tr>
</tbody>
</table>

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

As an example, clearing "Read" access for the "Everyone" group hides the selected content item (page in this case) from being publicly visible on the website. Selecting "Apply settings for all subitems" for the item makes all subitems become publicly invisible as well.
EXAMPLE: Changing access settings for a parent item with subitems

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

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

Do the following:

2. In the tree structure, select the parent item (in this case a page) for which you want to set access rights.
3. The access rights that apply to the item are displayed. Access rights are by default inherited from the closest parent item. To change the settings for the current item, clear the Inherit settings from parent item check box.

4. To add additional groups or users, click Add Users/Groups, and then click Search to find the desired user or user group. Add them one at the time by double-clicking on them. Click OK when you are done.

5. Specify the access levels for each user group (or individual user) in the list by selecting either Read, Create, Change, Delete and Publish or Administer.

6. Save the settings. The same changes are applied to all subitems that have Inherit settings from parent item set.

EXAMPLE: Adding settings to subitems without affecting existing settings

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

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

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

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

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

EXAMPLE: Adding access rights for visitors and visitor groups

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

You can also set specific access rights for visitor groups. To define access rights for visitor groups, follow the instruction as described above but select the **Visitor groups** type option in the search for **Users/Groups** dialog.

---

**Access rights to assets**

Just as for pages, access rights can be applied to assets, such as folders, blocks and media, in the content structure. You can define specific access rights from the "Root" level and all the way down,
including the "Global Assets", which is where blocks and media are stored, as well as the "Recycle bin" (Trash). Note that blocks and media share the same folder structure.

If you want to automatically publish media that are uploaded to the website, editors who upload must have publish access rights in the folder (under Global Assets) to which the media are uploaded. Also, editors must have create access rights in the root level of the website to be able to create blocks.
Scheduled jobs

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

Administering scheduled jobs

Manage scheduled jobs as follows:

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

Under the History tab, you can monitor the status and results when a scheduled job has been executed. If a job fails, information about it appears under Message.
CMS  Built-in scheduled jobs

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

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

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

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

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

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

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

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

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

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

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

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

**Mirroring Service**

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

**Monitored Tasks Auto Truncate**

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

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

**Notification Message Truncate**

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

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

**Notification Dispatcher**

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

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

No notification is sent if no new comments or replies have been posted since the job last executed.

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

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

**Change Log Auto Truncate**

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

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

**Remove Abandoned BLOBs**

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

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

**Remove Unrelated Content Assets**

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

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

**Commerce-related scheduled jobs**

Installing Episerver Commerce will add additional scheduled jobs to your implementation. Refer to Scheduled jobs in the Commerce user guide for more information.

**Find-related scheduled jobs**

Refer to Administration and configuration in the Episerver Find user guide for more information on scheduled jobs for Find.

**Other scheduled jobs**

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

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

Exporting data

You can export the following:

- Content items
- Content types
- Frames
- Dynamic property definitions
- Tabs
- Categories
- Files
- Visitor groups

When selecting a type of item to export, available items of that type on the website will be displayed.
Select the items to transfer and click Export to download the file package.

**Importing data**

With the Import Data function, you can retrieve information exported from another Episerver website. Start by selecting the file package to import, files must end with *.episerverdata in order for the import to work.

Click Upload and Verify File to verify the file content. The files are read and checked, and verification information will be displayed. Select a destination for imported pages to be added, and click Begin Import.
If you select **Update existing pages with matching ID** check box, the import will keep the same GUID-based identities for items (for example, pages, blocks and files) as they had on the exporting site. During import, a check whether an item already exists is performed, and if true that item will be updated (given that the imported item had a changed date that is later than the existing item). This means that content items with the same ID will be replaced instead of added, with every new import.
System settings

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

General tab

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Error handling in Episerver CMS</td>
<td>Select how you would like the errors to be handled, whether the setting should be active for all visitors, remote visitors or should be disabled.</td>
</tr>
<tr>
<td>Handler for subscription updates</td>
<td>The subscription function in Episerver allows visitors to receive information, for instance, about new and updated pages. Depending on whether multi-language is supported, you can select how the subscription dispatch is to be managed. This list can also include your own solutions for the subscription function.</td>
</tr>
<tr>
<td>Encrypt the connectionString.config file</td>
<td>The connectionString.config file contains sensitive information sent to and from the database. Select this check box to encrypt the information.</td>
</tr>
<tr>
<td>Enable globalization</td>
<td>Select this check box to activate management of content in multiple languages (globalization).</td>
</tr>
<tr>
<td>Detect language via browser’s language preference</td>
<td>Select this check box to activate languages to be shown based upon the visitor’s browser settings.</td>
</tr>
</tbody>
</table>
### Editing tab

**System Settings**

**Setting** | **Description** |
---|---|
**Path to CSS file for the rich-text editor** | This is the path to the CSS file that controls the appearance of the rich-text editor. This could be the same, or a similar, CSS file as the site uses for styling content so that the editors get the same look and feel as the site when editing content. It is also possible to set other CSS files for different editors on the website. This is a dynamic property that can be changed in the edit view. |
**Maximum number of versions** | Specify the number of previously-published versions of content items (for example, pages or blocks) that are stored. The currently-published version and draft versions are not counted. For example, if you enter 3, Episerver CMS stores three previously-published versions. If that is the case for a content item and you publish a new version, the oldest version is removed. Default value is 20 versions. If the **Unlimited versions** or **Disable deletion of content versions** box is checked, this field is ignored. |
**Unlimited versions** | Select this check box to store an unlimited number of versions of content |
<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
</table>
| Auto publish media on upload      | Select this check box if you want media to be automatically published and indexed when uploaded to the website.  

**Note** that if a user uploading media does not have publishing rights in the folder to which the media is uploaded, then the uploaded documents are not published (images, for instance, are not displayed when used in content).  
Ensure that editors who upload media also have the proper access rights set in the media folder structure.  

Also **note** that if this check box is selected and a user (with the proper access rights) uploads media, it is published and indexed immediately, so can be found by search engines, even if no published page contains links to the media.  

If the projects feature is enabled in your system, this setting is ignored.  
Uploaded media that is associated with a project is not published until it is manually published or published via scheduling, even if this setting is turned on. |
| Enable Projects                   | Select this check box if you want to enable the projects feature. The projects feature lets editors publish multiple related content items at the same time.  

Once enabled, it is enabled for your entire website and for all editors. The projects feature is described in detail in The projects feature section in the CMS Editor User Guide. |
Managing websites

With this feature you can easily add and remove websites from an Episerver installation, for instance, to create short-lived campaign websites.

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

You have the following options to add new websites:

- **Single-site setup** allows your installation to have one CMS site mapped to one IIS instance. The IIS mapping is either with a wild card or a specific host name. It is possible to have several single sites with separate databases and code base on the same server. In that case, you have a separate admin interface for each site.

- **Multi-site setup** allows you to have a single CMS site as a base (default site), and the ability to create new sites in admin view that share the same root page, database and code base. The additional sites are either automatically mapped and require no additional configuration (if the base site is mapped to wild card), or they need manual configuration of host name.

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

**Requirements**

The following requirements must be met to manage websites in admin view:
Available licenses. A notification message informs you of the number of sites allowed by the license available for the installation. Refer to License Information on the Admin tab for detailed license information.

Unique URL. In admin view, each website must have a unique URL and start page in the content tree. Start pages cannot be nested.

Domain mapping must be configured in IIS.
   » For multi-site setup, the IIS must be configured to respond to any host name.
   » For single-site setup, each separate CMS site must have an IIS site configured.

Adding and updating a website from admin view

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

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

<table>
<thead>
<tr>
<th>Site setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Type a name that identifies the website, for instance, “Example Site”.</td>
</tr>
<tr>
<td>URL</td>
<td>Enter the URL for the site, for example,”<a href="http://examplesite.com%E2%80%9D">http://examplesite.com”</a>. asset</td>
</tr>
<tr>
<td>Start page</td>
<td>Select the page to which the visitor is sent if only a host name is specified.</td>
</tr>
<tr>
<td>Use site-specific assets</td>
<td>Select this check box to ensure that assets for this site are not available for use on other sites in the installation.</td>
</tr>
<tr>
<td>Host name</td>
<td>Optional. Enter a specific URL, for example, “examplesite.com”. If you do not name the website, it is automatically named with the URL you have entered. One of the sites in the installation must be bound to the * host name. That site is used as a fallback when an exact match for the host name used by the visitor cannot be found. This setting is less important in a single-site scenario, as you are only allowed to have one site configuration. However, in a multi-site scenario, you must make sure that all host bindings active in IIS are mirrored in the corresponding site configuration. For example, you want to add “examplesite.se”.</td>
</tr>
<tr>
<td>Culture</td>
<td>Select the default language to be used when a visitor accesses the website using the host name.</td>
</tr>
</tbody>
</table>
| Type                | The type indicates if a host name is the primary host, editing host, or if the host should be redirected. Redirection can be set to permanent or temporary, which determines the type of HTTP redirect status that should be
<table>
<thead>
<tr>
<th>Site setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>used. Requests are redirected to the primary host or, if none has been defined, the first non-redirected host found. There can be one primary host name and at least one host that is not redirected or an editing host. These restrictions apply per culture and for hosts not bound to any culture. Select an edit host to identify a dedicated editing server in a multi-server solution. Only one editing host per site can be defined. Also note that the wild card host name cannot be set as primary or editing host, but it can be redirected.</td>
</tr>
<tr>
<td>Scheme</td>
<td>Select the preferred scheme that should be used for this host. This will only affect the generation of links to the site as incoming requests are matched to the host name regardless of scheme.</td>
</tr>
</tbody>
</table>

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

The following example shows a default website with different host names, languages and redirection types configured:
This example would lead to the following behavior:

- A request to http://redirected.se is redirected to http://examplesite.se using an HTTP 301 response.
- A request to http://www.example.com is served the Swedish content. Note that canonical links added in the templates should point to http://example.com.
- A request to http://redirected.no/page/ is redirected to http://examplesite.no/page/ using an HTTP 301 response as this is the only Norwegian host that is not redirected.
- A request to http://redirected.com is redirected to http://examplesite.com using an HTTP 302 response as per the wildcard specification.

**EXAMPLE:** Campaign website

The following example shows a campaign website:
Edit Website

Settings associated with the site.

### General
- **Name**: Campaign site
- **URL**: http://summercampaign.example.com
- **Start page**: Start [5]
- **Use site-specific assets**

### Host Names

<table>
<thead>
<tr>
<th>Host Name</th>
<th>Culture</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>summercampaign.example.com</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

[+ Add] [Delete Site] [Save] [Cancel]
Managing website languages

For editors to be able to create content in a particular language, it must be added and activated. You can also set an access level for a language. This prevents unauthorized editors from creating or editing pages in that language.

Language overview

Go to the **Config** tab > **Manage Website Languages**. All languages added to the website are displayed, and you can see which of them are enabled. You can adjust the order of the languages using the arrows to the left of the language. To change a language’s settings, click its name.

<table>
<thead>
<tr>
<th>Move Up</th>
<th>Move Down</th>
<th>Name</th>
<th>Language Code</th>
<th>Enabled</th>
<th>System Icon</th>
<th>Template Icon</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>English</td>
<td>en</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>English (United Kingdom)</td>
<td>en-GB</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>English (New Zealand)</td>
<td>en-NZ</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>English (South Africa)</td>
<td>en-ZA</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Deutsch</td>
<td>de</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>français</td>
<td>fr</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>español</td>
<td>es</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>svenska</td>
<td>sv</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>norsk</td>
<td>no</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>dansk</td>
<td>da</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>suomi</td>
<td>fi</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Nederlands</td>
<td>nl</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Nederlands (Belg):</td>
<td>nl-BE</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>portugues (Brazil)</td>
<td>pt-BR</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Adding and editing languages

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

![Image of language settings](image)

5. In the **Template icon** field, enter the path to an icon that symbolizes the language. Several flags are stored in the C:\Program Files\Episerver\CMS\<release>\Application\App_Themes\Default\Images folder. If you want to make your own icons, they should be 15x15 pixels so they fit properly in the edit view.

6. In the **Web address prefix** field, you can provide a specific prefix to show the content of the relevant language. If you do not provide a prefix, the language code is used, for example, www.company.com/nl.

7. Use **Access level** to define which editor groups should have access to create and edit content in this language (see below). When a language is added, it is available for the **Everyone** group by default. Only users with access rights for a language have it available on the **Sites** tab, and can create and edit content in that language.

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

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

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

Deleting an existing language

The recommended way of removing a language from the website is to open the language for editing, and deselect the **Enabled** option.
Creating categories

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

Categories in Episerver CMS can be used to classify content, for example, when building filtering features for search and navigation. You create categories in admin view, and apply them to content in edit view.

A category is a built-in property in Episerver CMS. You can apply categories to content, but you need to build the customized functionality for your website to display the resulting outcome, for instance, in a filtering.

Also, do not confuse content categories with Commerce categories, see Creating a catalog entry.

Adding a category

Add a new top-level category as follows:

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

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

7. Use the up or down arrows if you want to move this category higher or lower in the list. This sequence determines the order in which categories appear in the Select Categories dialog box.

8. If you want to add a subcategory to a top-level, select the plus sign under Add. Add the subcategory in the same way as the top-level category.

Deleting or changing categories

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

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

<table>
<thead>
<tr>
<th>Frame Name</th>
<th>Description</th>
<th>Edit</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>_blank</td>
<td>Open the link in a new window</td>
<td></td>
<td></td>
</tr>
<tr>
<td>_top</td>
<td>Open the link in the whole window</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Tabs

You can make properties appear on different tabs by selecting the Edit Tabs function. From here you can add, edit and delete tabs. You can also define the display order for tabs, and apply access levels.
Adding and editing a tab

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

Setting of access rights from Permissions for Functions

These functions, found in the admin view under Config > Security > Permissions for functions, require setting of access rights:

- **Detailed error messages for troubleshooting** provides selected groups or users access to detailed error messages. In System Settings, it is possible to activate a function that provides visitors with a form to fill in whenever a technical error occurs on the website. By changing the access rights here, you can specify who should receive these forms.

- **Allow the user to act as a web service user** allows a user to call one of the web services provided by Episerver. This function is only used for system integration purposes.

- **Allow users to move data/pages between page providers** lets selected users or groups move pages between page providers. This is used for websites with a custom page provider integrated with another system. Since data is deleted in the source provider, you may want to limit access to this function.

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

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

Deleting permissions to a function for a group or user

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

For more information on how to work with access rights, refer to the **Access rights** section.
CMS Tool settings

Under **Tool Settings** you find miscellaneous functions for the integration and configuration of Episerver CMS.

**Plug-in manager**

Many functions in Episerver CMS are created as plug-ins, which can be managed from the **Plug-in Manager**. Selected parts can be activated and deactivated. If your organization has invested in additional plug-ins, you can also find them in the Plug-in Manager. After choosing a plug-in, choose which parts of it should be accessible in the **Overview** tab.

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
<th>Version</th>
<th>Company</th>
<th>License</th>
<th>More Info</th>
</tr>
</thead>
<tbody>
<tr>
<td>EPIServer</td>
<td>Web Content Management System</td>
<td>9.5.1.0</td>
<td>EPIServer AB</td>
<td>System internal</td>
<td><a href="http://www.episerver.com">http://www.episerver.com</a></td>
</tr>
<tr>
<td>EPIServer Enterprise</td>
<td>Enterprise support for EPIServer CMS</td>
<td>9.5.1.0</td>
<td>Unknown</td>
<td>System internal</td>
<td><a href="http://www.episerver.com">http://www.episerver.com</a></td>
</tr>
<tr>
<td>EPIServer User Interface</td>
<td>Supporting logic for the built-in web forms and user controls</td>
<td>9.4.0.0</td>
<td>EPIServer AB</td>
<td>System internal</td>
<td><a href="http://www.episerver.com">http://www.episerver.com</a></td>
</tr>
<tr>
<td>EPIServer:Cms:ShellUi</td>
<td>OnLine Center support for EPIServer CMS</td>
<td>9.4.0.0</td>
<td>EPIServer AB</td>
<td>System internal</td>
<td><a href="http://www.episerver.com">http://www.episerver.com</a></td>
</tr>
<tr>
<td>EPIServer CMS MVC Template package</td>
<td></td>
<td>9.4.0.0</td>
<td>EPIServer AB</td>
<td>Custom license</td>
<td><a href="http://www.episerver.com">http://www.episerver.com</a></td>
</tr>
<tr>
<td>EPIServer:LinkAnalyzer</td>
<td></td>
<td>9.5.1.0</td>
<td>Unknown</td>
<td>System internal</td>
<td><a href="http://www.episerver.com">http://www.episerver.com</a></td>
</tr>
</tbody>
</table>

**Change log**

By default, all changes to pages, files and directories are logged in the **Change Log** system. You can filter the information in the Change Log, making it easier to find relevant information.

Changing the Change Log state

Change the Change Log state as follows:

1. In admin view, select **Config** tab > **Tool Settings** > **Change Log**.
2. Select a state:
   - **Enabled**. The Change Log starts automatically when the site starts and is available for read and write operations.
» **Disabled.** The Change Log does not start when the site starts. Items written to the Change Log are ignored, but items may still be read from the Change Log.

» **Auto.** The Change Log starts as soon as any dependencies (such as a Mirroring Job) are registered against it. If no dependencies exist, the system does not start. If already running, it stops.

Filtering the Change Log

Filter the Change Log as follows:

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

<table>
<thead>
<tr>
<th>Field name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Change date from</strong></td>
<td>The query is run from the change log from this date.</td>
</tr>
<tr>
<td><strong>Change date to</strong></td>
<td>The query is run from the change log to this date.</td>
</tr>
<tr>
<td><strong>Category</strong></td>
<td>From the <strong>Category</strong> drop-down list, select:</td>
</tr>
<tr>
<td></td>
<td>» <strong>Page</strong> to run a query on pages only.</td>
</tr>
<tr>
<td></td>
<td>» <strong>File</strong> to run a query on files only.</td>
</tr>
<tr>
<td></td>
<td>» <strong>Directory</strong> to run a query on pages directories only.</td>
</tr>
<tr>
<td></td>
<td>If you do not select an options from the drop-down list, changes are read from the <strong>Change Log</strong> when the query is run.</td>
</tr>
<tr>
<td><strong>Action</strong></td>
<td>The following actions can be filtered in the Change Log:</td>
</tr>
<tr>
<td></td>
<td>» Check in</td>
</tr>
<tr>
<td></td>
<td>» Create</td>
</tr>
<tr>
<td></td>
<td>» Delete</td>
</tr>
<tr>
<td></td>
<td>» Delete language</td>
</tr>
<tr>
<td></td>
<td>» Move</td>
</tr>
<tr>
<td></td>
<td>» Publish</td>
</tr>
<tr>
<td></td>
<td>» Save</td>
</tr>
<tr>
<td></td>
<td>» Delete children</td>
</tr>
<tr>
<td><strong>Changed by</strong></td>
<td>To filter for a specific user, enter the Episerver CMS user name.</td>
</tr>
<tr>
<td><strong>Maximum number of items per page</strong></td>
<td>Limits the displayed number of items. Click the next and previous arrows to browse through the list of items.</td>
</tr>
<tr>
<td><strong>Start with sequence number</strong></td>
<td>Enter a specific sequence number to start listing the items in the change log.</td>
</tr>
<tr>
<td>Field name</td>
<td>Description</td>
</tr>
<tr>
<td>---------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Read direction</td>
<td>List change log items in either ascending or descending order.</td>
</tr>
</tbody>
</table>

2. Click Read to run the query. A list of matching change log items are displayed.

To remove all Change Log items that are more than one month old and without dependencies, use the Change log auto truncate scheduled job.

Website developers can customize and extend the Change Log. Consult your website developer for assistance.

**Rebuild name for web addresses**

Use the **Rebuild Name for Web Addresses** function to change addresses in the address field. When a visitor views a page on a website based on Episerver CMS, a path to the page is shown in the address field, as in the example below. The address reflects the page's place in the website structure.


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

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

The **Rebuild Name for Web Addresses** function can affect links to the website. All internal links are updated automatically, so you do not have to worry about these. However, if other websites link to a certain page, that link may be broken. The function can also affect visitors' browser favorites.

Creating a rebuilding name for web address

Rebuild names for web addresses as follows:
1. On the **Config** tab, select **Rebuild Name for Web Addresses**.

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

3. Click **Rebuild Links**.

**Mirroring**

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

Mirroring jobs are executed at time intervals that you define, as described in **Scheduled jobs**.

To enable mirroring, a mirroring application must be installed and running. The application handles data transfer between websites and is run separately to the Episerver CMS source and target sites. You can configure source and target websites to use separate mirroring applications. It is also possible to install and configure a single mirroring application. Refer to **Episerver World** for more information on how to configure and work with mirroring.
Creating a channel

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

Go to the source site in admin view > Config tab > Tool Settings > Mirroring to create a channel for mirroring as follows:
1. Click **Create** and enter the following information:

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Name</strong></td>
<td>Type an unique name for the mirroring channel.</td>
</tr>
</tbody>
</table>
| **Parameters**   | Optional field that can be used by providers. In this version, there is one parameter which can be handled by the provider: 


   The TransferAction has two options **None** and **ForceCurrentVersion**. By default, the value is **None**, which creates a new version for each published page on the target site. The **ForceCurrentVersion** option does not create a new version for each published page. Instead, it updates the page on the target site. |
| **Use default URI** | Select to use the URI defined in the configuration file (**web.config**) for the mirroring application. When you select this option, the **URI** field is disabled. |
| **URI**          | Enter the URI to the destination mirroring application's target service, for example: 

   - `http://localhost/Mirroring/Mirroring/MirroringTransferServer.svc`

   The service for the default provider is: 

   - `MirroringTransferServer.svc`. |
<p>| <strong>Start page</strong>   | Select the local root page on the source site to be mirrored.               |
| <strong>Root page on destination</strong> | Select the page number on the target site where the pages are mirrored to. |
| <strong>Include start page</strong> | Determines if the start page is mirrored or if only its children are mirrored. |
| <strong>Import as anonymous user</strong> | Determines if an anonymous user does the export and import of pages and files when the mirroring job is run. |
| <strong>Import content as user</strong> | Determines if an identified user does the export and import of pages and files when the mirroring job is run. |
| <strong>Enable reporting</strong> | Select to enable reporting for the mirroring job through email. When you select this option, the <strong>E-mail address</strong> field becomes editable. |</p>
<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>E-mail address</td>
<td>Enter the email address where the mirroring job report is sent.</td>
</tr>
<tr>
<td>Continue on Error</td>
<td>Select to enable a mirroring job to continue even there is problem on the importing side. If this option is not selected, a mirroring job terminates as soon as an error occurs.</td>
</tr>
<tr>
<td>Enabled</td>
<td>Select to enable the channel as active. If this option is not selected, nothing is mirrored for the channel.</td>
</tr>
<tr>
<td>Enable validation</td>
<td>Select to enable validation before items are mirrored. The mirroring job validates that all page types for pages being mirrored are present in the target site and that the page type has the same number and type of page properties as the source site. By default the mirroring job checks all necessary page types and page definitions, which is included in the start page and its descendants.</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reset Channel</td>
<td>Select to mirror everything again from the root page of the mirroring channel to the source site next time it is run. To reset the channel, select the name of the mirroring channel and click <strong>Continue with Reset</strong>.</td>
</tr>
<tr>
<td>Check System</td>
<td>To validate the created channel, click <strong>Check System</strong>. The result of this is displayed under the <strong>Messages</strong> tab. It checks both the source and target site to see if all necessary parameters, such as URI, Root page at destination, Mirroring Server binding, and Access to Database, are set up correctly. See the section about synchronizing mirroring in the <strong>Developer Guide</strong> under <strong>Deployment &gt; Mirroring &gt; Installing and Configuring mirroring</strong>.</td>
</tr>
<tr>
<td>Messages</td>
<td>The result of a check system is listed in the <strong>Messages</strong> tab. Click the arrow to view the result and other information regarding previous mirroring jobs that have been run.</td>
</tr>
<tr>
<td>Monitoring</td>
<td>The status of a mirroring job is displayed in the <strong>Monitoring</strong> tab.</td>
</tr>
<tr>
<td>Target Site Configuration</td>
<td>To use a site as a mirroring target, some configuration is required.</td>
</tr>
</tbody>
</table>
### Search configuration

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

#### Enabling search providers

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

- **Blocks**. Allows for search in blocks.
- **Files**. Allows for search in files.
- **Pages**. Allows for search in pages.
- **Jump to**. Makes it possible to jump directly from the search hit list to menu alternatives matching your search criteria.
- **Products**. Allows for search in products if you have Episerver Commerce installed.
- **Find files, blocks and pages** if you have Episerver Find installed.

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

Properties are central in Episerver CMS. Properties are used in content types to store and present data, such as page types and block types, and they are the “fields” where editors enter information into a page type. A property can be for instance the page name, an image placeholder, or the editor area, where text can be added. For example, the XHTML editor is a property of the type “XHTML String (>255)”, which results in an editorial area in the page type when used. For property content to be visible to visitors, it must be linked to a content type with corresponding rendering.

Property types

Properties can be defined either in code or from the administrative interface. For certain properties defined in code, it is possible to do “non-breaking” changes in admin view to override these settings. If a property is defined in code and cannot be changed in admin view, information about this will be displayed. If you make changes to a property defined in code, it is possible to reset the changes to the values defined in code.

The following types of properties are used:

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

Property settings can be found under the **Config** tab in the **Property Configuration** section, and when working with content types under the **Content Type** tab.

Editing and adding properties on content types

A common example of property editing is to define toolbar buttons for the **TinyMCE rich-text editor**. Properties are normally defined in code but rarely added in admin view, since properties added from there are not rendered.

When editing and adding properties, the following tabs are available:

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

Editing a property

The upper **General** section of the **Common Settings** tab contains information about a selected
property. If a property is **defined in code**, information about it is displayed, but you cannot change values such as property type and presentation control. You can change other settings, such as making a property mandatory or searchable. The lower *User Interface* part contains settings related to the property display in edit view.

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

Adding a property

1. In admin mode, from the *Content Type* tab, select a page type and click *Add Property*.
2. In *Type*, select a property type. There are several property types to choose from: integer, string, page, date, etc. You can also create a property type.
3. In *Name*, name the property. This is used when programming and making language settings.
4. Mostly the TinyMCE editor is used, and the **Presentation control** drop-down list appears dimmed. Use of multiple editors is supported. If your website is configured to allow multiple editors and you chose the property type "XHTML String (>255)", the **Presentation control** drop-down list is enabled, and you can select the XHTML editor to use.

5. Select if you want a default value for the property. This is the default value on all pages where it is used. You can specify a default value for both customized and built-in properties.

6. Clear the **Searchable property** check box to exclude a property from search. It might be beneficial to avoid undesired property values the search index. By default, all properties are searchable.

7. Select whether the property is unique for a certain language by selecting the **Unique value per language** check box. This is only needed if the website supports globalization.

8. Select the **Value must be entered** check box to make it mandatory to enter a value for the property before saving. The setting is configured per property and content type.

9. Use the **Display in edit view** check box to determine if the property is visible in edit view. By default, all properties are visible in the editorial interface. The setting is configured per property and page type.

10. Specify a heading for the property in the **Field name** field. This text is displayed for the editor when editing the page in All Properties editing view unless a translation of it has been added language resources.

11. Specify a help text in the **Help text** field. This text should help the editor understand how to use this property, and is displayed in All Properties editing view when hovering over the property name.

12. Select the tab on which the property is to be displayed in the **Tab** drop-down list.

13. Save the settings.

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

### Defining language-specific properties

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

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

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

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

**Setting a property to be language-specific**

1. On the **Content Type** tab, select the page type that contains the property to be set.
2. Click the name of the property that you want to change.
3. Select the **Unique value per language** option.
4. Save your changes.

**Organizing properties in content**

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

**Changing the order of properties**

Follow these steps to change the order in which properties appear in the All Properties editing view. For example, you can display important properties at the top of the page.
1. Select the page or block type on the **Page Type** or **Block Type** tab.

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

Placing a property on a tab

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

**Configuring customized property settings**

Under **Property Configuration** and **Edit Custom Property Types** and **Dynamic Properties**, you can configure custom property types.

Priorities and configuration
The property settings have the following priority:

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

Properties can be created, named, and given a data type and other settings. Property settings can be found in admin view under on the Config tab > Property Configuration for more information.

- Dynamic properties are inherited. When defined on a selected page, a property is inherited to the subpages. If you have other values stored on one of the subpages, you can choose to retain or overwrite the property values. Applying dynamic properties to pages is done from the Dynamic Properties option in edit view.
- Built-in property types can be edited under the Edit Custom Property Types section. User-defined property types can also be created and named here.
- Dynamic properties are added and edited under the Dynamic Properties section.

Creating custom property types

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

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

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

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

Default values for properties are not defined in code.

**CMS Configuring the rich-text editor**

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

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

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

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

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

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

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

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

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

Configuring global and custom settings

Use global settings to change the layout and the buttons in the rich-text editor toolbar for a property. Global settings can be used on all page types as a default, or on only one page type. You can have as many global settings as you like on your website, making it possible to create an editor suitable for all editors working with the website. You can also apply custom changes for a specific page type.
Configuring global settings for the XHTML String (>255) property

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

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

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

Configuring global settings for a property on a page type

You can configure global settings for a property on a page type so that one of the global settings is used, but only on this property and on this page type.

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

Configuring custom settings

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

Configure a custom setting as follows:

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

Deleting a global setting
Delete a global setting by opening the setting and clicking **Delete**.
Content types

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

Content types and properties

Page and block types contain the properties where editors enter information, for example, a link to an image on a web page.

For a content type, you define a set of properties that can hold information, for example, a link to an image or to a web page, or an editorial text. A typical website has a set of content types that match the identified functions needed on that website.
The content type is the base/blueprint from which you create one or many page or block instances. To display content to visitors, the page or block type and its properties need to be mapped to corresponding rendering.

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

You can define page types either in code or from the admin view. Block types, on the other hand, can only be defined in code. For page types defined in code and for all block types, it is possible to do “non-breaking changes” of properties in admin view.

If the settings defined in code cannot be changed in admin view, information about this is displayed. If you make changes to a page type defined in code, you can reset the changes to the original values defined in code.

Page types

Be careful when altering page type settings since changes may cause the website to stop working. Although you can create page types in admin view, it is recommended to create them from code.

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

Since page types and their properties can be defined either in code or from the admin mode, this means that it may be impossible to change certain settings from admin mode. If a page type is created from code, this is shown on the page type information page under General.

Refer to Creating a Page Types below for more information about available settings for page types.
Creating a page type from admin view

Create a page type from the admin view as follows:

1. On the **Page Type** tab, select **Create New Page Type**.
2. Under the **Information** tab, enter the following information:
   - **Name**. Enter the name of the page type here.
   - **Display name**. Enter the name that will be displayed in the list of available page types.
   - **Description**. The text describing the page type, will be displayed in the list of available page types.
   - **Sort index**. Determines the sorting (ascending sort order) in the list of available page types in edit view, the default value is 100.
   - **Available in edit view**. This option makes the page type available for selection when creating new pages in the editorial interface. It is recommended to hide page types that are rarely used by editors, for instance the start page type. These can made available when needed, and then hidden again.
   - **Display Template**. Select any of the following templates to be used for the page type:
     - **Web Form template path**. Select this option to enter a path to the aspx page template file to be used to display the content of the page.
     - **Web form template**. Select a specific Web Forms template that the page type is associated with. If your developer has created several templates using type classes, these appear in the list.
     - **MVC template**. Select a specific MVC template with which the page type is associated. If your developer created several templates using type classes, they appear in the list.
   - **Registered template**. This option is useful when you want to use registered page templates for displaying content. The registered page templates are available for selection in the drop-down list. A page type can then be associated with predefined page templates to display the same content using different channels.
   - **Advanced information**. Displays information about the GUID, class name and assembly name for the page type.
   - **Access level**. Determines the users and user groups for which the page type is available when creating new pages. The default setting is **Everyone**, meaning that it will be available to all users and groups. Do the following to limit access rights for a page type:
1. Click the **Create** check box to clear the access level setting for **Everyone**.
2. Click **Add users/Groups** and select the relevant users or groups. Click **OK** when done.
3. Make sure that the **Create** check box is selected for the desired users and groups and click **Save**.

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

![Edit "Standard Page"](image)

Change the following properties default values:

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

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

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

![Available Page Types](image)

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

» **Use Default Settings**. Select to revert to default settings as defined in code for this page type.

» **All**. Possible to create pages based on all page types available in edit view.

» **None**. Not possible to create child pages for this page type.

» **Selected**. Manually select the page types that should be available.
6. Click **Save**, or **Revert to Default** if you want to restore your settings.

**Copying an existing page type**

When you copy a page type, all of its properties are also copied. You can then edit the information for the page type and its properties.

Copy a page type as follows:

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

**Block types**

Block types are similar to page types, and some settings can be modified from admin view.

Editing a block type
Edit the settings for an existing block type as follows:

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

Other content types

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

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

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

- All page versions are converted. Therefore, ensure that no users are working with the page types to be converted.
- A page property in the new page type can only be mapped to one old page property.
1. Select **Convert Pages** from the **Content Types** tab in admin view.

![Convert Pages](image)

2. Select a page in the **Select pages to convert** field and select the **Convert the selected page and all subpages (of the selected page type)** check box if you want all the subpages to be included in the conversion.

3. Select the page type that you want to convert from in the **Convert from Page Type** list. The list of page properties included in that page type is updated in the **Convert from Property** list.

4. Select the page type that you want to convert to in the **Convert to Page Type** list. The list of page properties included in that page type is updated in the **Convert to Property** list.

5. Map each page property to a corresponding property in the page type to which you want to convert.
6. Click **Convert**. To test the conversion, click **Test Conversion and Show Log**. This displays a detailed log of converted pages and page properties.

⚠️ Selecting **Remove property permanently** deletes the property. This action which may damage existing content that uses the property.
Visitor groups

Personalization in Episerver allows you to target website content to selected visitor groups. The personalization feature is based on customized visitor groups, which you create based on a set of personalization criteria. A set of basic criteria are provided out-of-the-box, for example criteria for geographic location, number of visits, and referring search phrase. You can also develop customized criteria.

**Built-in visitor group criteria**

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

<table>
<thead>
<tr>
<th>Visitor group criteria</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Site Criteria</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>▶ <strong>Number of Visits</strong> matches the number of times the visitor has visited the website.</td>
</tr>
<tr>
<td></td>
<td>▶ <strong>User Profile</strong> matches a value stored in a user’s profile. When adding this criterion, you can specify that to be part of this group, a user must have a specific value for a profile setting. You can decide if the user profile property should match on equal, contain, start with, or end with a specified value.</td>
</tr>
<tr>
<td></td>
<td>▶ <strong>Visited Category</strong> lets you select one of the page categories on the website. You can also select how many different pages that use the specified category the visitors have visited. The visitor must have visited the specified number of pages that have the specified category set on it.</td>
</tr>
<tr>
<td></td>
<td>▶ <strong>Visited Page</strong> lets you select one specific page on the website. The visitor must have visited the specified page during the current session.</td>
</tr>
<tr>
<td><strong>Time and Place Criteria</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>▶ <strong>Geographic Coordinate</strong> looks up the visitor’s approximate location in a geolocation database (based on the visitor’s IP address). Drag the marker and drop it on the map (Google Maps), and select a radius around that point to match the visitor’s location to the selected location.</td>
</tr>
<tr>
<td></td>
<td>▶ <strong>Geographic Location</strong> looks up the visitor’s approximate location in a geolocation database (based on the visitor’s IP address) and matches their location to the selected location. You can match the visitor to a specific continent, country and region. You can also</td>
</tr>
<tr>
<td>Visitor group criteria</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------</td>
<td>-------------</td>
</tr>
<tr>
<td></td>
<td>specify a wild card for country and region.</td>
</tr>
<tr>
<td></td>
<td>Time of Day matches the visitor's time period with the start time, end time, and weekdays you specify.</td>
</tr>
<tr>
<td>URL Criteria</td>
<td>Landing URL stores the URL that the user enters the site with. You can decide if the landing URL should match on equal, contain, start with, or end with a specified value.</td>
</tr>
<tr>
<td>URL Criteria</td>
<td>Referrer stores the URL of the referred page that was clicked before entering the site, for example, a search engine result page. You can decide if the referrer criteria should match on equal, contain, start with, or end with a specified value for the whole URL or parts of it.</td>
</tr>
<tr>
<td>URL Criteria</td>
<td>Search Keyword stores the URL of the referred page that was clicked before entering the site, for example, the URL of a search engine result page. This criteria can be defined by your partner developer to specify the search word to match against the URL by a regular expression. The regular expression finds search words in the URL. Note this criterion is not compatible with Google due to privacy restrictions for Google searches.</td>
</tr>
<tr>
<td>Visitor Group Membership</td>
<td>let you select members from existing visitor groups.</td>
</tr>
</tbody>
</table>

### Managing visitor groups

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

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

Creating a visitor group

Add a visitor group as follows:

1. From the global menu, select CMS > Visitor Groups.
2. Click Create.
3. In the **Criteria** section, click to add criteria for the visitor group as follows:
   1. In the **Match** drop-down list, select the criteria to match **All**, **Any** or **Point**. What you select here affects all criteria for the visitor group. Using points is a way to set a value for what a desired action on the website is worth.
   2. Drag the criteria from the pane on the right and drop it into the **Drop new criterion here** area.
4. Make the settings for the criteria, see examples described in **Examples of creating visitor groups**.
5. In **Name**, name the visitor group you are creating. This name is displayed in the personalized content box when you select the content on a page.
6. In **Notes**, type a descriptive text about the visitor group you have created, for example, its purpose. This description is displayed as a tooltip when the editor is adding a visitor group to the content on a page.
7. In **Security Role**, select the check box if you want this visitor group to be available when setting access rights for pages and files in admin mode. Note that visitor groups only have read access.
8. In **Statistics**, keep the check box selected to enable statistics for the visitor group (this check box is selected by default).
9. Save the settings.

**Editing a visitor group**
Change a visitor group as follows:

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

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

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

Copying a visitor group

Copy a visitor group as follows:

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

Deleting a visitor group

Delete a visitor group as follows:

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

Viewing and clearing statistics

The visitor group statistics are shown as a gadget on the dashboard. Clear the statistics from the database as follows:
1. From the , select **CMS > Visitor Groups**.
2. Click the **Clear statistics** button.
3. Confirm the deletion.

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

**Examples of creating visitor groups**

How to define visitor groups using some of the built-in criteria provided.

**EXAMPLE: Site criteria and points**

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

1. In the **Match** drop-down list, select the criteria to match **Point**.
2. Drag and drop the **Visited Page** criterion, and select page. Use drag-and-drop of the criteria again to add several pages.

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3. Drag and drop the **Number of Visits** criterion, and select **More than > 1 > Since [date]**. To create a visitor group for visitors who have never visited the page, select **Less than > 1 > Since [date]**.

4. Enter the number of points each criterion is worth, and select whether or not the criterion is required.

5. Select **Threshold** for the criteria you added in your visitor group. For example, the visitor must fulfill 1 of 3 criteria to be included in the visitor group.

6. Save the settings.

**EXAMPLE: Geographic location**

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

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

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

3. Save the settings.

**EXAMPLE: Geographic coordinate**

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

1. Drag and drop the **Geographic Coordinate** criteria, and click **Select Location**.

2. Select a location by clicking on the map to include in the geographic coordinate and click **OK**.

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

4. Save the settings.

**EXAMPLE: Referrer**

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

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

1. Drag and drop the **Referrer** criteria, and select **URL > Equals > the URL of the search engine result page**, for example,

   http://www.google.se/#hl=sv&source=hp&biw=1338&bih=790&q=episerver+cms.

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

### Additional visitor group criteria

The built-in visitor group criteria can be extended as described below.

**Commerce** Episerver Commerce criteria

Visitor group criteria specific for e-commerce, for instance customer properties, markets and order frequency criteria. Refer to Personalization for Commerce for more information.

**Addons** Episerver Visitor Group Criteria Pack

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

**Addons** Episerver Marketing Automation

Visitor group criteria specifically designed for marketing automation.
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