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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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About Episerver

The base of the Episerver platform is the CMS (Content Management System) with its core features for online content creation, publishing, and website management. The platform can be extended with Episerver Commerce for managing e-commerce tasks, and Episerver Find for building advanced search features, as well as a broad selection of other add-ons from both Episerver and third-parties.

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Episerver CMS is a powerful yet easy to use web content management platform, based on cutting edge technology. The intuitive user interface and superior usability of Episerver CMS allow both experienced and occasional users to efficiently manage website content. Refer to the Managing content section in the CMS Editor user guide for more information on how to work with CMS features.

Adding Episerver Commerce to your CMS solution brings e-commerce functionality such as catalog, customer and order management, combining the powerful content publishing and display features of CMS with advanced back-end online store management. Refer to the Commerce user guide for more information about Episerver Commerce features.

There are many add-ons available for extending your Episerver solution. The add-ons from Episerver described in this documentation add features such as advanced search, Google Analytics and social media integrations. Refer to the Add-ons section in the online help for more information about Episerver add-ons.

Refer to Introduction and What's new for information about licenses and recent features.
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 (16-2) describes features added up until and including update 105 for Episerver. Refer to Episerver World for previous user guide versions.

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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.

User interface

The Episerver user interface is flexible allowing developers to plug-in customized features when implementing websites. This description refers to a “standard installation” of Episerver without customizations.

The toolbar and the panes in the Episerver edit view provide easy access to functions when working with content. When entering the edit view, you will have the global menu and the toolbar at the top, and adjustable panes to the left and right.
The **global menu** provides access to other areas of the Episerver platform. You can also access this user guide, your user settings and a global search from the global menu. Note that you in some areas need to pull down the global menu with the arrow.

The toolbar contains features like preview and view options, and lets you add items such as pages or blocks.

A notification toolbar may be displayed below the toolbar showing confirmation and error messages and such.

### General features

- **Context-sensitive actions.** Some features are only available in certain context. The toolbar, for instance, presents relevant actions depending on what you are currently doing, and the add (+) button also offers context-sensitive options.
- **Primary actions.** Some actions open in a new window, for example, a page delete confirmation. The background is then dimmed, meaning that you must finish the primary action to continue.
- **Action feedback and notifications.** Successful actions are confirmed by a message in the notification bar. A notification may also appear in case of an error requiring you to take action.
- **Drag-and-drop operations.** Drag-and-drop is supported in many areas. For instance, you can drag pages, media files and blocks into the rich-text area or content areas, or re-arrange the page tree structure using drag-and-drop.
- **Keyboard commands.** Standard keyboard commands are supported in many areas, for instance, when moving pages in the page tree or in the rich-text editor.
- **Search.** Supported in many areas to locate, for instance, pages in the page tree or media in the folder structure.
Adaptable work environment. Resize and pin the panes depending on what you are currently doing, and add and remove gadgets of your choice for quick access to functionality.

Support for time zones. Publishing actions in the edit view are done in your local time zone, whereas administrative actions are based on server time.

Context menus are available in many areas, for instance, in the panes, the page tree and in item listings. The menu displays different available options depending on where in the interface you are and what you are doing.

Panes

The user interface has a left-hand and a right-hand pane, which can be adjusted and extended with additional gadgets.

- Pane pin is used for expanding and locking the panes in an open position.

- Settings for a pane or a gadget allow you to configure or remove a gadget, or rearrange gadgets in a pane.

Left-hand navigation pane

Contains the page tree structure (Pages), language branch (Sites) navigation, tasks management (Tasks), and project items (Project Items) by default.
Right-hand assets pane

Contains the Media and Blocks folder structures by default, for easy access to drag items into the content you are currently working with.
Editing

The toolbar on top displays an actions menu with context-sensitive publishing options which vary depending on content status and user access rights. During editing, content status and autosave information are displayed.
When working with content such as pages and blocks in CMS, or catalog content in Commerce, there are two editing views, **On-Page Editing** and **All Properties**, with toggle buttons to switch between them.

- **On-Page Editing** provides quick access to direct editing of a selection of content properties.
- **All Properties** provides access to all available properties including more advanced ones such as access rights and language settings.

When editing content properties, these options are common when adding, deleting, or selecting items:

- ![Icon](icon.png) Click to select, for instance, a category.
- ![Icon](icon.png) Click to select, for instance, an image in a media folder, or a page in the page tree.
- ![Icon](icon.png) Click to remove, for instance, a category.

**Real-time Updates**

Episerver is by default set up to display comments and changes to projects in the user interface immediately. If Episerver experiences problems with these immediate updates, the following dialog box is displayed.
The *Real-time Updates* dialog box can have two main reasons. It appears either because Episerver has encountered a network problem and cannot connect to the web server or because your system does not have the WebSocket protocol enabled, which is used for the real-time updates of the user interface.

**Network problems**

Network problems occur if there is an error in the web server configuration, or if there are problems with your corporate network or the with Internet connection. As long as there is a problem, you are unable to continue working with Episerver.

Whatever the reason, Episerver will try to reconnect to the web server. If it still cannot connect after a number of attempts, you get an error message saying: “The server has been unavailable for an extended period of time. Please verify the internet connection and refresh the browser.”

Contact your IT department or Internet service provider if the problem persists.

**WebSocket support**

WebSocket is an Internet protocol used to automatically update the Episerver user interface.

If you are using the projects feature, the WebSocket protocol is used to check for new or updated comments and project items from other users. As soon as one of your colleagues adds a comment or project item, Episerver automatically updates your user interface and displays the comment or item (assuming you have the projects interface open).

However, the WebSocket protocol must have been enabled for your system by an administrator for the real-time updates to work. If it has not been enabled, you can still work with Episerver and with projects and comments but you need to manually refresh the user interface with the **Refresh** button to see new comments or items.

Depending on the system configuration when the WebSocket protocol is disabled, you may or may not see the *Real-time Updates* dialog box.
My settings

Under the global menu > your user name > My settings, you can change some of your account settings. User name and password are usually set in an external system, such as Windows or an SQL database, and cannot be changed in Episerver in that case.

In the Display Options tab, you find the following settings:

- **Personal language.** Select your desired user interface language from the drop-down. This setting affects the language of the user interface, such as texts in buttons and dialog boxes. It does not affect the language of your website.

- **Limit touch support.** On touch-screen devices, browsers may have difficulties prioritizing between input from the screen and from the mouse, which may cause problems such as making it impossible to resize panes using the mouse. If you experience problems with Episerver and the touch screen, enable the Limit touch support feature. This feature prioritizes mouse input over touch screen input and enables the mouse for interactions such as drag and drop, resizing of panes, and so on.

![My Settings screenshot](image)

- **Reset all views to system default.** You can reset your user interface views to the settings. If you have changes to the user interfaces, such as added, moved or deleted gadgets, these changes are undone and the default views are displayed.

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.

CMS Finding content

Follow these tips to find Episerver content within edit view.

<table>
<thead>
<tr>
<th>What you know</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Content location within page, asset or block structure</td>
<td>Navigate the page tree structure or the blocks and media assets pane and select content.</td>
</tr>
<tr>
<td>Content location on the website</td>
<td>Using the preview option, navigate to the content on the website.</td>
</tr>
<tr>
<td>Content is associated with a project</td>
<td>Use the projects gadget or, if you are using the projects feature, the project overview or the project items navigation pane.</td>
</tr>
<tr>
<td>Text within content title or body</td>
<td>Use either the global search in the global menu or the search fields at the top of the navigation and assets panes.</td>
</tr>
<tr>
<td></td>
<td>» The global search can search all types of content on the website (depending on the configured search provider).</td>
</tr>
<tr>
<td>What you know</td>
<td>Action</td>
</tr>
<tr>
<td>---------------</td>
<td>--------</td>
</tr>
<tr>
<td>Search fields in navigation and assets panes search for content in respective pane and related dialogs.</td>
<td>See Search for search tips.</td>
</tr>
<tr>
<td>A page’s status (for example, draft)</td>
<td>Use the Tasks tab to find all content in that status.</td>
</tr>
<tr>
<td>Content was edited recently</td>
<td>Use the Recently changed status in the Tasks tab or the Recent gadget, see Managing gadgets for information on how to add this gadget.</td>
</tr>
</tbody>
</table>
Managing content

Content on a website can originate from different sources, depending on where on the site and by whom it has been created. Content can be created "internally" by editors and marketers, or by merchandisers on an e-commerce website. Content can also be created "externally" by the visitor community through interactive social features on the website, if these are available.

Content can be pages and blocks in CMS, or product content from the catalog on an e-commerce site. Content can also be assets such as images and videos, or documents, for instance, in Word or PDF format. Episerver has a sophisticated version management features, allowing multiple editors to work with draft versions, before approving and publishing the content.

Draft content can be previewed before publishing, so that you can verify the content before publishing. When working with personalization, you can preview content the way it will appear for different visitor groups. To further limit access to content that is work-in-progress, you can also set access rights for content from the edit view.

If you have content in multiple languages on your website, Episerver has advanced features for managing translation of content into additional languages, including the use of fallback and replacement languages.

Commerce-related content

Refer to Managing e-commerce-related content in the Commerce User Guide, if you have Episerver Commerce installed.

Optimizing content to improve search

Refer to Working with content to optimize search in the Find User Guide, if you have Episerver Find installed.

Working in On-page edit view

On-page editing is what you see when accessing the edit view in Episerver. From here you can instantly start editing content; the areas that are available for editing are highlighted. The available areas depend on how the page type has been defined and each area is set up with a property type which controls what you can do with each area. One area can, for example, have an image property type and is intended for images; another area can have a page description property and is intended for text describing the page. This means that you will have different editing options when clicking an area, depending on the area's type of property. Typically for a page, you can edit page name, description, the main editorial area, and perhaps a content area with blocks.
Areas and properties available for editing are implementation-specific, and depend on the type of property and how the rendering is built on your website.

EXAMPLE: Editing a page through on-page edit

Here we describe how to edit a page, but the procedure is similar when editing, for instance, blocks or catalog content if you have Commerce installed.

1. Select the page to edit from the page tree in the navigation pane.
2. Click an area to edit (property names will be displayed on mouse-over).
3. Make your changes by updating the content properties as needed. Refer to Using the rich-text editor for information on how to add and edit text in this type of property.
4. Your changes are automatically saved, and a draft version of the content (page, block etc) is created.
5. At any time, you can access the preview option at the top to see what the published version will look like.
6. When done, publish the content or apply any of the other options described in Publishing and managing versions.

Editing additional properties

The on-page editing view contains a number of properties which are reached by scrolling to the very top of the page with the wheel on your mouse. These are called basic info properties and can be used to add a simple address, set access rights for a page or to change the name in the URL and so on.

Not all properties are available in the on-page editing view; to see all properties, switch to the All Properties editing view.

Working in All properties editing view

The All properties editing view provides editing access to all properties available for content, including those that are not available in the On-page editing view. Select All Properties
in the toolbar to access these additional properties.

Areas and properties available for editing are implementation-specific, and depend on the type of content on your website. Here we will describe some tabs and properties as they appear in the Episerver sample templates.

Global properties
If you have content in multiple languages on your website, some properties may be locked for editing in a specific language. These properties are “globally shared” and can only be edited in the master language. Refer to Translating content for information on how to edit these.

Basic info properties
The top gray area displays the basic info properties which are also accessible in the on-page editing view. This area is always displayed in the All Properties editing view.

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>The name of the page. Depending on the implementation, this may be the heading of the page, and it is also shown in the page tree structure and menus.</td>
</tr>
<tr>
<td>Name in URL</td>
<td>The page URL is automatically created based on the name of the page and its place in the navigation. It depends on the implementation if this is visible in links on the website. If you copy a page, the URL of the original page will be copied with a number added to it. Remember to change this if you create new content based on existing page copies. Note that changing the URL for an existing page may cause broken links.</td>
</tr>
<tr>
<td>Simple address</td>
<td>This is a unique URL that can be added to frequently requested pages on your website, allowing visitors to locate the page simply by typing the simple address name directly after the main URL of the website. Providing, for example, “products” as a simple address makes it possible to find the page just by entering the URL (for example, <a href="http://www.-company.com/products">http://www.-company.com/products</a>) in the address bar of the browser even if the Products page is located further down in the navigation tree. You can use the Simple address report to manage simple addresses for your website.</td>
</tr>
<tr>
<td>Property</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Display in navigation</td>
<td>Deselect this option for pages that you do not want to be visible in navigation structures or menus on the website.</td>
</tr>
<tr>
<td>Visible to</td>
<td>Indicates if public access to the content is restricted. Click Manage to change these settings as described in Setting access rights from edit view.</td>
</tr>
<tr>
<td>Languages</td>
<td>Shows available languages for the content. If you have multiple languages on your website, see Managing multiple languages.</td>
</tr>
<tr>
<td>ID, Type</td>
<td>Shows the unique ID set by the system and the type of content on which the content is based.</td>
</tr>
</tbody>
</table>

**Tabs**

All other properties are organized using tabs. These can be added and modified in code as well as from the administrative interface.

**Content tab**

The Content tab contains properties for entering the main content, when editing a page or a block in CMS, or catalog content if you have Episerver Commerce installed.
Property | Description
--- | ---
Category | Categorization of content is useful, for instance, in filtering functionality for search, navigation and listings. Categories must be created in the administrative interface, before they can be applied to content in edit view. **Note:** A category is a built-in property in Episerver CMS. You can apply categories to content, but your website also needs customized functionality to display the resulting outcome, for instance, in a filtering. Also, do not confuse content categories with Commerce categories, see Creating a catalog entry.
Main body | Example of a rich-text editor property, for adding editorial content such as text, images and links. Refer to Using the rich-text editor for more information.
Settings tab

The Settings tab is default and contains a set of built-in properties for managing publication dates, sort order and shortcuts.

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Published, Created and Modified</td>
<td>These are system-generated timestamps for the content that rarely need to be changed.</td>
</tr>
<tr>
<td>Update modified date</td>
<td>Select this check box if you have made significant changes to the content and want the system to update the modification date and include the content once more, for instance, in a subscription send-out.</td>
</tr>
<tr>
<td>Sort subpages and sort index</td>
<td>These are used for defining the sort order for pages in the page tree structure and navigation menus. Refer to Structuring the website for more information on how to structure a website.</td>
</tr>
<tr>
<td>Shortcut</td>
<td>Shortcuts are used for creating menu or navigation links. A shortcut will not display any content of its own, instead it will become a menu option linking directly to some other content on the same website or on an external website. Click Manage to add a shortcut for the page.</td>
</tr>
<tr>
<td>Property</td>
<td>Description</td>
</tr>
<tr>
<td>--------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Start</td>
<td>Contact Us</td>
</tr>
<tr>
<td>defaultGroup</td>
<td></td>
</tr>
<tr>
<td>Shortcut type</td>
<td>No shortcut, display this page</td>
</tr>
<tr>
<td></td>
<td>No shortcut, display text only</td>
</tr>
<tr>
<td></td>
<td>Shortcut to page in Episerver CMS</td>
</tr>
<tr>
<td></td>
<td>Shortcut to page on another website</td>
</tr>
<tr>
<td></td>
<td>Fetch content from page in Episerver CMS</td>
</tr>
</tbody>
</table>

The following shortcut types are available:

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

- **Shortcut to page in Episerver CMS.** Links to another page on the same website. A visitor who clicks this link will be transferred to the page you have linked to, and kept within the same navigation menu structure.

- **Shortcut to page on another website.** Creates a link to an external page or to a document on the server. Remember to include the entire URL address, including "http://".

- **No shortcut, display text only.** Creates a heading with no link in the menu, without displaying any information or link to another page.

- **Fetch content from page in Episerver CMS.** Creates a link to another page from which content will be retrieved into the original page within the same navigation structure. Useful when re-using content on the website, in which case you only need to maintain it in one place.
From the administrative interface, it is possible to customize and configure default values for selected properties, or to make certain properties mandatory for editors to fill in. Refer to Properties in the CMS Administrator User Guide for more information.

**Commerce - Commerce-related content**

On an e-commerce website, content can be catalog entries such as products and variants if you have Episerver Commerce installed. Editing this type of content is similar to the editing of pages and blocks in CMS. Refer to Managing content in the Commerce user guide for more information.

**CMS - Creating content**

Content can be, for instance, pages or blocks in Episerver CMS, or catalog entries in Episerver Commerce. Below you will find out how to create various types of content in Episerver.

**Pages**

Pages are created from different page types containing the properties where the information is added. Do the following to create a CMS page:

1. In the page tree structure, select the page under which you want to add the new page.
2. Select New Page from the context menu or the add button on the toolbar.
3. Select a page type from the list of available page types, and provide a name for the page.
4. Add information in the various properties available for editing, for instance, the rich-text editor if this is part of the selected page type.
5. Preview the page, before sending it for approval or publishing it.
Blocks

Blocks are created in a similar fashion as pages. Select **Create new block** from the **Blocks** tab in the assets pane, or from the add button on the toolbar, in which case you will be prompted to define a location for the new block. Select a block type from the list of available blocks, provide a name for the block, and add information for the block. Blocks can also be created directly from content areas in pages. Note that if you add a block directly from the content area, it will be saved in the **For this page** folder, which means that it will only be available on the selected page and cannot be used on other pages.

Refer to **Blocks** for more information.

**Commerce** Commerce-related content

On an e-commerce website, content can be catalog entries such as products and variants if you have Episerver Commerce installed. The creation of this type of content is similar to the creation of pages and blocks in CMS. Refer to Managing content in the Commerce User Guide for more information.

**CMS** Editing content using the rich-text editor

The **TinyMCE rich-text editor** is a property where you can enter information such as text with formatting, images, tables and links to other content. The rich-text editor is used for both pages and blocks in Episerver CMS, as well as for catalog content if you have Episerver Commerce installed.
The Episerver sample templates come with a selection of activated editor functions (buttons). Additional buttons can be activated from the administration view. You can drag and drop blocks into the editor area, as well as pages from the page tree to create links. Spell checking is available either from the browser you are using, or through the Spell checker add-on from Episerver.

**Formatting**

The Styles option displays a drop-down list with predefined style formats retrieved from the CSS style sheets on the website, to be used when formatting text.

The styles list can be extended to include specific formatting for an introduction text, a predefined table layout, or to position images with floating text in the editor area.

**Copying and pasting**

When copying and pasting text from external sources, you want to avoid undesired formatting tags to be included. It is recommended to either work with plain text, or only use the copy from Word option when copying from properly formatted Word documents.

- **Toggle paste as rich or plain text** will paste the text as rich text by default. Toggle to paste as plain text. Use keys Ctrl+v or Cmd+v to paste the text. Then use predefined styles to format the text as desired.

- **Paste from Word** will keep the formatting from the Word document. Use keys Ctrl+v or Cmd+v to paste the content into the Paste from Word window, and click **Insert** to insert the content into
To transform the text formatting from Word into the website's style, the headings and body text must be formatted using available template styles in Word. When you copy and paste text from Word, a "heading 2" in Word will be converted into the "heading 2" using the website styles.

Keyboard shortcuts

The following standard keyboard shortcuts are supported in the rich-text editor:

<table>
<thead>
<tr>
<th>Command</th>
<th>Shortcut keys</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select all</td>
<td>Ctrl+a or Cmd+a</td>
</tr>
<tr>
<td>Undo</td>
<td>Ctrl+z or Cmd+z</td>
</tr>
<tr>
<td>Redo</td>
<td>Ctrl+y or Cmd+z</td>
</tr>
<tr>
<td>Bold</td>
<td>Ctrl+b or Cmd+b</td>
</tr>
<tr>
<td>Italic</td>
<td>Ctrl+i or Cmd+i</td>
</tr>
<tr>
<td>Underline</td>
<td>Ctrl+u or Cmd+u</td>
</tr>
<tr>
<td>Copy</td>
<td>Ctrl+c or Cmd+c</td>
</tr>
<tr>
<td>Cut</td>
<td>Ctrl+x or Cmd+x</td>
</tr>
<tr>
<td>Paste</td>
<td>Ctrl+v or Cmd+v</td>
</tr>
<tr>
<td>H1–H6 headings</td>
<td>Ctrl+1–6 or Cmd+1–6</td>
</tr>
<tr>
<td>Paragraph break</td>
<td>Enter or Control+o</td>
</tr>
<tr>
<td>Line break</td>
<td>Shift+Enter</td>
</tr>
</tbody>
</table>

Depending on customizations and the browser you are using, certain shortcuts may not work as described.

**CMS Adding and editing images**

A web page does not embed images, instead it will link to the media library where images are stored. To display images in content, they must be available in a folder in the Media structure. Images can be edited inside Episerver using the Image Editor, providing basic image editing features such as cropping, resizing and transforming.
Adding images to content

Images are often added to content through an image link property, where you simply select an image from a folder under the Media tab, and the image will automatically be properly placed and displayed in the content.

Images can be also added to the rich-text editor or content areas in pages or blocks, either through drag-and-drop directly from Media, or by using the toolbar in the rich-text editor:

1. Place the cursor in the editor area where you the image.
2. Click the Insert/edit image button on the editor toolbar.
3. Enter an Image description for the image. The image description is important when a reader has turned off the display of images in the browser or when a visually impaired user is using a screen reader.
4. Type a Title for the image. The title is shown when the reader moves a mouse over the image.
5. Select the desired image in the Media folder structure.
6. Click Insert.

Editing images

Do one of the following to access the Image Editor options:

- Locate the desired image in Media, and select Open in Image Editor from the context menu.
- In the rich-text editor, click the image and then select Image Editor in the toolbar.
Image editing features include cropping, resizing and transforming:

<table>
<thead>
<tr>
<th>Image editing</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Crop</td>
<td>Enter values for <strong>Top</strong>, <strong>Left</strong>, <strong>Width</strong> and <strong>Height</strong>, or draw a selection in the</td>
</tr>
</tbody>
</table>
An edited image file can either be saved as a copy or replace the original file:

- **Save as a copy.** If the image was selected in a page or block, the copy will be saved in the local folder. If the edited image was selected in the media structure, the (renamed) copy will be saved in the same folder as the original.
- **Replace original image.** Note that this action will affect all places on the website where the image is used.

Removing images from content

For an image in:

- an image property, click the remove option.
- a content area, select Remove in the context menu.
- the rich-text editor, click the image and delete it.

Changing image properties

The display of images in the rich-text editor can be controlled through a set of properties:

1. Select the image you want to change in the editor area.
2. Click the Insert/edit image button on the editor toolbar.
3. On the General tab, you can change the Title and Image description. Click Update to save your changes.
4. On the **Appearance** tab, you have the following options of positioning images in relation to text:

   1. In **Dimensions**, you can change the display size of an image. Ensure that **Constrain proportions** is selected in order to keep the image proportions. Enter the width of the image in pixels, and the height will be changed accordingly.
   
   2. In **Class**, select a CSS class if any are available for positioning images on your website. Or, select an option in **Alignment** to manually position the image.
   
   3. In **Vertical space** and **Horizontal space**, add a value in pixels for the space between the image and the surrounding text if it is not handled by the CSS class. This might be useful if you, for example, have a large amount of text on a page and want to place an image in the top right corner with the text floating around it with some space padding between the image and the text. The preview window allows you to see the result of the different options you choose.
   
   4. In **Border**, add a value in pixels for the image border if it is not handled by the CSS class.
   
   5. Click **Update** to save your changes.

5. On the **Advanced** tab, you can change any of the following:

   1. Select **Alternative image** to add different images for **mouse over** and/or **mouse out**. Browse to select the images in the media library. For best results, these images need to have the same size proportions in pixels.
   
   2. In **ID**, you can set a unique identifier for the image. The ID can be referenced by style sheets or by a JavaScript providing additional functionality.
   
   3. In **Language direction**, you can set the language direction (left to right or right to left) for the description, title and other text attributes specified for the image.
   
   4. In **Language code**, set the desired language, for example, if you have an image showing content in a different language than the actual page. Enter the standard language code format, for example it (Italian), es (Spanish), en (English) etc.
   
   5. In **Image map** you can associate an image map with the image. Image maps are used to map certain areas of an image to links or other actions. There is currently no built-in way to create image maps in TinyMCE.
   
   6. In **Long description link**, type a link to provide a longer image description than what fits in the description field. Note that most visual browsers do not support this feature, this is primarily an accessibility feature.
   
   7. Click **Update** to save your changes.

---

**CMS Adding links**

Links are frequently used on websites to link between content. In Episerver CMS, the following link types are available by default.

- **Page**. Links from one page to another on the same website.
- **Media**. Links to images, documents and other media files stored on the web server.
In addition, you can use **shortcuts**, a specific type of link used for navigation and reusing existing website information. Refer to All Properties editing view for more information.

**Creating a link**

Links in the rich-text editor can be created through drag-and-drop (pages and media files), or by selecting text and clicking the **insert/edit link** button in the toolbar, which will display the link dialog.

![Create link](image)

- **email**: Links to create an email message with the linked email address entered.
- **External**: Links to content on other websites or media on file shares.
- **Anchor**: Links to sections within a page, allowing readers to jump between topics on a page.

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The Link title will be displayed as descriptive text for the link, for example, on mouse over.

Using Open in, you can make the link display in a new window, often used for links to external sources.

With the Language option you can link to a specific language version for content. "Automatic" will direct visitors to the detected browsing language version.

Linking to a page on the same website

Place the cursor in the rich-text editor where you want the link, and drag the desired page from the page tree into the location. The page name will become the link name (can be edited if needed).

Or, select the text where you want the link in the rich-text editor, click the insert/edit link button, and use the Page option to select a page to link to.

Linking to a page on an external website

Select the text where you want the link in the rich-text editor, click the insert/edit link button, and use the External link option to enter the web address (URL) to the website to link to, for example, http://externaldomain.com.

Linking to files in Media

Place the cursor in the rich-text editor where you want the link, and drag the desired file (PDF, Word etc.) from a Media folder into the location. The file name will become the link name (can be
Or, select the text where you want the link in the rich-text editor, click the insert/edit link button and use the Media option to select a media file to link to.

You can create links to any type of document format, but the behavior when a link is clicked will depend on the file format and the settings of the computer from which the link is opened.

Linking to files on a file server or an external website

Select the text where you want the link in the rich-text editor, click the insert/edit link button and use the External link option to add the path or URL to the file to link to. For a file server, enter the complete path including the computer name, and the file name with file extension. Note that the file storage network location must be properly accessible for this to work. Valid external prefixes are "http", "https", "ftp" and "file".

Linking to an email address

Select the text where you want the link in the rich-text editor, click the insert/edit link button and use the email option to enter the email address to link to. When the link is clicked, the default email client will open with the email address entered in the address field of the email.

Linking from an image

Select the image in the rich-text editor, click the insert/edit link button and add a link using any of the Page, Media, External link or Email options.

Anchor links

When adding anchors, you first create the anchor and then you add the link to it from the link dialog.

1. Select the text in the rich-text editor where you want to place the anchor.
2. Click insert/edit anchor button and enter a name for the anchor. Avoid using special characters or spaces.
3. Select the text in the rich-text editor where you want to link to the anchor.
4. Click the insert/edit link button and use the Anchor option to select the anchor to link to.

Link properties

These are examples of common implementations of link functionality on websites, with functionality similar to what is described for the link dialog above.

Image link

When adding images to content areas intended for images or blocks etc., instead of adding the image in
the rich-text editor, an image link property is often used. This allows editors to select an image from a folder in Media, automatically placing it properly in the content area. Refer to Adding and editing images for more information.

Link collection

A link collection is a property where you can conveniently manage a group of links.

Links are created by dropping pages or media files in the link collection area, or by creating links through the link dialog. Links can be created for pages, media files, external sources and email addresses. Links can be moved to change the order in which they will be displayed.
In addition to the usual link dialog options, you can also edit the displayed name of the link.
**Commerce** Linking to catalog entries

If you have Episerver Commerce installed, the link dialog will contain an option to select items from the product catalog when creating links. Refer to Manage content in the Commerce user guide.

**CMS** Using forms

Web-based forms is a popular and frequently used feature on websites for creating, for example, questionnaires or registration forms for events. The built-in forms functionality in Episerver CMS is available through a form property, which is added to a page template or a block during implementation. On the Episerver sample site, for example, the forms functionality is made available through a Form block.
You also can create block-based forms; see Episerver Forms in the online user guide.

Locate the Forms property (its location depends on your system configuration), and click the button to access the Select Form dialog, the "entrance" to forms management.

Managing forms

Forms are administered in the Select Form dialog, from where you can view all forms on the website, organize them in folders and use them in content. Forms can be placed in a selected folder when you edit or create them. Form folders can be deleted, note that you can only delete empty folders.

- Click Edit to edit an existing form, this can be saved with a new name to keep the original.
- Click Delete delete a form, forms can also be deleted from within the Edit Form dialog.
- Click Select to select a form, and then Use to use the selected form in content.
- Click No Form to remove a link to a form that is currently used in content.
Creating a form

Start by creating the layout, then add the desired form fields. Complete the form by providing a name and defining the usage, then save it to become available for linking into content.

1. Creating the layout

Table Layout allows you to add rows and columns as desired to design the form. The table must contain at least one cell (row or column) before you can add any form fields.

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

After creating the basic layout, click **Form Fields** to add the fields. Click a cell in the layout, and select the desired type of field to add. You can also drag a desired property into the selected form table cell. Only one field can be added in each table cell. Depending on the selected field type, properties will be displayed for values to be entered. Save your changes when done with a set of field properties.
Common form field properties

<table>
<thead>
<tr>
<th>Field property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CSS class</td>
<td>Apply a CSS class (format) for the field (the class must exist in the CSS files for the website).</td>
</tr>
<tr>
<td>Name (mandatory)</td>
<td>Identifies the field in the database, and is not visible to visitors. You can use the same name as for the <strong>Heading</strong> field. Only characters A-Z, a-z, 1-9 and _ are allowed.</td>
</tr>
<tr>
<td>Heading</td>
<td>Indicates what should be entered in each form field.</td>
</tr>
<tr>
<td>ToolTip</td>
<td>The tooltip appears when you place the cursor over the form field.</td>
</tr>
</tbody>
</table>
## Field property

<table>
<thead>
<tr>
<th>Field property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value must be entered</td>
<td>Select this check box if you want a value to be mandatory. If a value is not entered in the field, an error message will appear. The error message refers primarily to the <strong>Heading</strong> in the field. If you do not have a heading, it refers to whatever you have entered in the <strong>Name</strong> field.</td>
</tr>
<tr>
<td>Validate as</td>
<td>Checks whether a form field value is entered using the correct format, for example an email address, a date format or various types of numbers.</td>
</tr>
</tbody>
</table>

## Form field types

<table>
<thead>
<tr>
<th>Field type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Text box</td>
<td>Short text information placed on one row.</td>
</tr>
<tr>
<td>Text area</td>
<td>Larger amount of free text, you can define number of characters and rows.</td>
</tr>
<tr>
<td>Drop-down list</td>
<td>Adds a drop-down list field type to select options from.</td>
</tr>
<tr>
<td></td>
<td>▶ In the Options group, specify available alternatives.</td>
</tr>
<tr>
<td></td>
<td>▶ Enter a Name for the option and a Value to identify the field in the database.</td>
</tr>
<tr>
<td></td>
<td>▶ Check Preselected to indicate an option that will be selected by default.</td>
</tr>
<tr>
<td></td>
<td>▶ You can change the order in which the options will be displayed in the list.</td>
</tr>
<tr>
<td>Radio button</td>
<td>Adds options where only one can be selected (compare to check box).</td>
</tr>
<tr>
<td></td>
<td>▶ Use Placement to display radio buttons horizontally or vertically.</td>
</tr>
<tr>
<td></td>
<td>▶ In the Options group, specify available alternatives.</td>
</tr>
<tr>
<td></td>
<td>▶ Enter a Name for the option and a Value to identify the field in the database.</td>
</tr>
<tr>
<td></td>
<td>▶ Check Preselected to indicate an option that will be selected by default.</td>
</tr>
<tr>
<td></td>
<td>▶ You can change the order in which the options will be displayed in the list.</td>
</tr>
<tr>
<td>Check box</td>
<td>Adds options where multiple selections are allowed.</td>
</tr>
<tr>
<td></td>
<td>▶ Use Placement to display radio buttons horizontally or vertically.</td>
</tr>
<tr>
<td></td>
<td>▶ In the Options group, specify available alternatives.</td>
</tr>
<tr>
<td></td>
<td>▶ Enter a Name for the option and a Value to identify the field in the database.</td>
</tr>
</tbody>
</table>
### Field type

<table>
<thead>
<tr>
<th>Field type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>database.</td>
<td>Check Preselected to indicate an option that will be selected by default. You can change the order in which the options will be displayed in the list.</td>
</tr>
<tr>
<td>Button</td>
<td>Adds a button which will send the form when clicked. Enter a Button text be displayed on the button. In Result from sending, select an option for managing the form data when sent: Save to database will save the information in the database to be retrieved from there. In Send email to this address, enter the email address where the message will be sent. You can add several recipients by entering the email addresses separated by commas. In E-mail address of sender, enter the sender’s address that should be in the message sent. In E-mail subject, enter the heading to be shown in the message subject box. In Send to specified URL, enter the web address for the information to be sent for further handling.</td>
</tr>
<tr>
<td>Heading</td>
<td>Adds a heading describing what should be entered, for example to explain sections of large forms.</td>
</tr>
<tr>
<td>Horizontal rule</td>
<td>Inserts a horizontal rule into the form, for example to split large forms into sections.</td>
</tr>
</tbody>
</table>

### 3. Completing the form

When completing the form, enter values as desired for these form properties:

<table>
<thead>
<tr>
<th>Form property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name of form</td>
<td>This name will be shown in the forms list, as well in the subject row in any email messages sent.</td>
</tr>
<tr>
<td>Form folder</td>
<td>The location where the form will be stored.</td>
</tr>
</tbody>
</table>
Form property | Description
---|---
Form can be sent without logging in | This option allows anonymous visitors to post the form. If deselected, visitors will need to be logged in to the website to post the form.

Same person can send the form several times | This option allows the same person (that is, computer user) to post the form multiple times. If deselected, the form can only be posted once per computer.

Page shown after the form has been sent | Link to a confirmation page following a form posting.

When completed, click **Save and Close** to return to the **Select Form** dialog. Click **Use** to link the form to desired content.

**Viewing and exporting form data**

If you chose to save the form data in the database as a posting result, the aggregated form data can be retrieved for viewing and exporting. Open the content (page or block) where you have linked to the form in the **All Properties editing view**, and locate the **Forms** property. Select the **View data** option to access the form data.

Forms data displayed will be aggregated from all instances (page or block) where the form is used, if needed select a date interval to filter the data and click **Search**.
Before exporting, you can clean up the data by deleting any incorrect postings. Select the postings to export (click Select all to include all), and select the desired format to export to:

- **Export to Excel** exports the data to a Microsoft Excel file.
- **Export to XML** exports the data to an XML file.

**Exporting forms**

Forms can be exported between Episerver CMS websites. When exporting a form, an XML file will be created, which is then imported to the other website. Select a form to edit, go to the Import/Export tab, and click Import or Export.
Inserting embedded media

Adding embedded media to content works in the same way in both Episerver CMS and Episerver Commerce. Embedded media can be, for instance, a video or Flash animations. Just as with images, the embedded media must be available on the Media tab to be able to link to the media file as described in Managing media. The most common file formats are supported on the Episerver CMS sample site. For a detailed description of other formats such as Quicktime, Windows Media and Real Media, refer to available accessibility coding standards.

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

Insert embedded media as follows:

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

Advanced settings

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

Advanced options

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ID</td>
<td>Set a unique identifier for the media. The ID can be referenced by CSS style sheets or by a JavaScript providing additional functionality.</td>
</tr>
<tr>
<td>Align</td>
<td>Position the display of the media on the page.</td>
</tr>
<tr>
<td>Background</td>
<td>Select a background color for the media by using the following options: Picker, Palette or Named. Click Apply to apply the background.</td>
</tr>
<tr>
<td>V-Space and H-</td>
<td>Enter the horizontal and vertical space in pixels to surrounding objects.</td>
</tr>
</tbody>
</table>
### Flash options

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quality</td>
<td>Set the quality for the Flash movie to display. Specifies how to prioritize playback speed and appearance.</td>
</tr>
<tr>
<td>Scale</td>
<td>Set the scale to specify how the movie should adapt when displayed in a specified area.</td>
</tr>
<tr>
<td>WMode</td>
<td>Set the Window Mode property of the Flash movie for transparency, layering, and positioning in the browser.</td>
</tr>
<tr>
<td>SAlign</td>
<td>Specify how the movie should align in the browser window.</td>
</tr>
<tr>
<td>Auto Play</td>
<td>Select this to make the movie play automatically when the page is opened.</td>
</tr>
<tr>
<td>Loop</td>
<td>Select this to make the movie repeat indefinitely. If unselected, the movie will stop when it reaches the last frame.</td>
</tr>
<tr>
<td>Show Menu</td>
<td>Select this to display the menu.</td>
</tr>
<tr>
<td>SWLiveConnect</td>
<td>Select this to make the browser start Java when loading the Flash Player for the first time.</td>
</tr>
<tr>
<td>Base</td>
<td>Specify a base directory or URL used to resolve all relative path statements in the Flash Player movie. This attribute is helpful when your movies are kept in a different directory from your other files.</td>
</tr>
<tr>
<td>Flash Vars</td>
<td>Set the root level variables to be sent to the movie.</td>
</tr>
</tbody>
</table>

---

**CMS Adding dynamic content**

Dynamic content can be added to a page by retrieving it from different properties for a page. The source of the dynamic content can be, for instance, text in the “main body” field (the editor area on a page), or the date when a page was saved.

An example of the usage of dynamic content is to display company facts and figures that will be reused on multiple pages on a website. In addition, you can combine dynamic content with a visitor group as described in Personalizing content.
The feature to add dynamic content is not enabled by default, an administrator must enable it in the administration view. If it hasn't been enabled, you will not see the Dynamic content button on the editor toolbar.

Adding dynamic content

Add dynamic content from a Page Property as follows:

1. Open the page or block where you want to add the dynamic content and click the Dynamic content button on the editor toolbar.
2. In the Dynamic content window, select the plug-in that you want to use as a base for your dynamic content. The Page property plug-in is included in an Episerver CMS standard installation and is used in this example.
3. In Page to insert content from, select the page in the tree structure from which you want to display the data.
4. In Property to insert content from, select the property on the page that you want to display data from. In this example we will fetch data from the Main body property of a page.
5. In Personalization settings, you can click + to select the visitor group you want to have access to the dynamic content. This is optional.
6. Click **OK**. The dynamic content is displayed as a box in the editor area. When this property is updated, all dynamic instances of the property in the content will be automatically updated.
7. **Preview** the content and **publish**, or schedule for later publishing.

**Editing dynamic content**

You can cut, copy and paste dynamic content boxes in the editor area, just as you can with any other object. Select the “box” with dynamic content in the editor area, and click the **Dynamic content** toolbar button to edit. To delete, select the dynamic content box you want to delete and click **Delete**.

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

**CMS Previewing**

In Episerver, you can preview content while you are editing to view content as visitors will see it when published. The **preview** button hides the surrounding on-page editing frames and panes and you
can navigate through your website.

The preview option can display different things depending on how you are working with Episerver CMS:

» **You are not using projects or you are using projects via the projects gadget.** The preview option displays either the published version of each page, or if there is a newer draft, the primary draft version. Note that you may have a draft version in a project which is not set to primary draft; in this case, the preview does not display the project version. Use the View settings > Projects option (see table below for details) to view your website as if the items included in a project were published.

» **You are using the projects feature.** The preview option displays the active project. If no project is set as active, it displays either the published version of each page, or if there is a newer draft, the primary draft version.

Use View settings (the eye symbol) to preview content with the following options:
<table>
<thead>
<tr>
<th>View setting options</th>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Languages</td>
<td>.EN</td>
<td>Select a language to view the content as visitors using this language will see it.</td>
</tr>
<tr>
<td>Visitor groups</td>
<td></td>
<td>View the content as the selected visitor group will see it.</td>
</tr>
<tr>
<td>Media channels</td>
<td></td>
<td>Select a channel and/or a resolution to see the content as it will appear with the selected settings. Note that the options here are customized for your website.</td>
</tr>
<tr>
<td>Projects</td>
<td></td>
<td>Navigate and view the contents of a project to verify the display before publishing.</td>
</tr>
</tbody>
</table>

**Note:** This option is not available if the The projects feature functionality is enabled. In that case, the preview button displays the active project. To preview another project, you need to change the active project.

You can combine previewing with the view setting options, for instance, to display French content as visitors using a mobile device and with German as preferred language will see it.
Comparing versions

In the compare view in Episerver you can compare content and properties between specific versions to see what has changed. When comparing content, two page versions are displayed side-by-side in the On-page edit view. Properties are compared in the All properties edit view.

Toggle the Compare different versions button on the toolbar to turn the compare view on and off.

The Select compare mode button is displayed in the compare view and shows the selected compare mode, that is, if you are comparing content or properties. This selection is "sticky" which means that whatever mode was used the last time you did a comparison will be preselected the next time you turn on the compare feature.

Click this button to display a drop-down menu where you can change compare mode:

The notification bar displays two drop-down lists from which you can choose which versions to compare. By default, the draft will be shown in the left pane and the currently published version in the right. All language versions of the content are listed by default.

Comparing content

When comparing content you see the two different versions side by side in the On-page edit view. It is possible to scroll and resize the panes.

When you edit a published version in the left pane, a new draft will be created and displayed in the version list. It works in a similar way as you edit content directly on the page, and when you are done, you can publish a draft, or republish a previous version.
Comparing language versions when translating content

The current language will be selected in the language selector list, and you can filter the versions by language. You can compare versions made in the same language, or in different languages.

By comparing versions made in different languages, you can translate the content in the left pane side by side with the published version of the current language. You can also jump between languages to edit by selecting the current language in the version list of the left pane, and then switch language on the notification bar.
Comparing properties

When selecting to compare all properties, the two compared versions of the properties are displayed side-by-side in the All Properties editing view. They are displayed in the same tabs as they usually are, with the exception of the Basic info properties; these are displayed in a tab of their own instead of in the Basic info area. Tabs that contain changes between versions are highlighted with a yellow digit; the digit identifies the number of changed properties there are on the tab between the two compared versions.

In the compare properties view, the two property versions are displayed side-by-side. The latest version of the property is shown first, either to the left of or above the older version of the property. All properties that differ between the two versions are highlighted with a yellow background.
You can edit the latest version of the properties, and if you decide that you prefer the older version to the newer, you can click Copy and the older version will be used in the newer version as well. When you edit a published property, a new draft is created and displayed in the version list.

CMS Publishing and managing versions

Episerver has sophisticated support for advanced management of content creation and publishing involving multiple editors. The draft concept is central, ensuring that work in progress is never externally exposed until it is actively published. The publishing options you see depend on the content status and your access rights. Available actions, content status and notifications are indicated in the status bar at the top.

Publishing involves steps from creating a draft to publishing the final version, as well as managing versions. The steps apply to different types of content such as pages, blocks and media, or products if you have Episerver Commerce installed on your website.

Publishing actions

When creating or updating content, there are a number of actions you can perform to create drafts, undo changes, set content ready for review, publish directly or schedule publishing at a later stage etc.

Creating drafts and autosaving
Whenever new content is created or existing content is edited, a **draft** version is created automatically. This is not publicly available on the website until actively published. Changes to **content properties** are immediately **autosaved** by the system. Versioning is not used for drafts, which means that you, and other editors, can work on the same draft over time but you will still only have one version of the draft.

You can manually create a draft from a previously published version or from a version that is scheduled for publishing at a later time. This is done from the **Options** menu.

![Draft creation interface](image)

**Undoing and reverting to published**

While editing, clicking the **Undo** option in the status bar allows you to undo changes to content that has been previously autosaved.

- Select **Undo** to discard the changes done since the last autosave. Note that you can only undo changes you have made during the current editing session. As soon as you move to another page, close the browser, log out etc., the history of actions that can be undone is emptied.
- Select **Redo** if you discarded your changes through **Undo** and want to take them back again.
- Select **Revert to Published** to take back the latest published version, if the content has been previously published.
Previewing and comparing

You can preview content appearance using the **Preview mode** option in the top toolbar. You can also preview content by language, visitor group or display channel if these are used on your website. Refer to [Previewing](#) for more information.

You can also compare different content versions by using the **Compare version** option in the top toolbar. Refer to [Comparing versions](#) for more information.

Publishing

When done editing, click **Publish?** at the top and then **Publish** (or **Publish Changes**, if you are editing previously published content). The content is immediately published and publicly available on the website, provided that no access restrictions applies. Click **View on website** to view the content as it appears on the website.

Setting Ready to Publish

If you do not have publishing access rights, or if you want your changes to be approved by someone else before publishing, use the **Ready to Publish** option to mark the content as ready for approval and publishing. **Withdraw and Edit** allows you to take back content for further editing after sent for approval.
Approving and publishing

If you have publishing access rights, you can approve and publish changes for content with the status Ready to publish. You can also decide to reject the changes, in which case the content version status is set to Rejected. This does not mean that the latest changes disappear, only that the content needs to be edited again before it can be ready for publish. Content status and related tasks can be monitored under Tasks in edit view.

Scheduling for later publishing

If you have publishing access rights, you can schedule the publishing to occur at a later occasion.
Select the **Schedule for Publish** option, and set the date and time when you want the content (new or updated) to be published. This applies to both newly created content, as well as changes to existing content.

Removing scheduling and creating new drafts

Content that is scheduled for publishing, is locked for editing. Select the **Remove Scheduling and Edit** option if you wish to interrupt the scheduled publishing and continue editing the selected version.

Selecting **New Draft from Here** will create a new draft, **based on the scheduled version**, which will still be published at the scheduled time. You can continue working on the new draft, and apply publishing actions for this as desired. An advanced scenario would be to apply multiple publishing occasions for different versions of a campaign page, having them replace each other in a desired order.

**Publishing multiple content items**

The **projects feature** and the **projects gadget** allow you to preview and publish multiple content items at the same time, for instance, a landing page, blocks and products (if you have Commerce installed) that are part of a campaign.

**Managing versions**

If you need to backtrack and use an older version of a page or if you are managing multiple language versions, there are a number of tasks that can be performed from the version list. You can perform these actions by using the **More options** button found at the bottom of the version list.

You need to **add the versions gadget** to the left or right panel to see the version list.

**Viewing versions**

Content can have the following status in the version list:
Draft means content that is work in progress and has not yet been subject to any publishing actions.

Published means the most recently published version and the one publicly displayed, only one published version can exist.

Previously Published means one or more versions that were published before the latest published version.

Ready to Publish means content awaiting approval and publishing.

Rejected means a draft that has been rejected by someone as part of an approval flow. The rejected content is editable and can be updated and then set to Ready to Publish again.

Delayed Publish means content scheduled to be published at a certain time.

Expired means content where a stop publish date and time has been set and passed.

Click the column headers to sort the version list according to language, status and more.
The number of stored content versions can be defined in the administration view, the default setting is 20.

Setting the primary draft

The primary draft is the draft presented in edit view, when accessing the content. Multiple drafts may exist, by default the latest saved edited version is the primary draft, unless you are working in projects, see Versioning when working in projects.

Use the Set as Primary Draft option in the version list to make another draft the primary one.

A content item that has not been published can have only one draft. It is possible to create multiple drafts from published versions, each draft is editable individually and can be scheduled for publishing at different times. Note that there are no versioning of drafts so there is always only one version of each draft.

Editing and deleting versions

The content version selected in the version list is loaded into the editing area, from where you can edit the content or perform other available publishing actions.

Select the Delete Version option to delete a version. Content versions are not supported by trash management. So, when deleting a version in the versions gadget, the version is permanently deleted.

The version with status Published cannot be deleted, to do this another version needs to be published first. Deleting content versions cannot be undone. The possibility to delete versions can be disabled in the administration view.

Managing language versions

If the selected content exists in multiple languages, all language versions are displayed with a language code. To filter versions for a desired language, select Show Content in [language] Only in the version list.
Republishing a version

To republish a previously published version, select the desired version and select Republish from the publishing options. When you republish content, for traceability reasons, a new version with a new timestamp is created, even if no changes were made.

Working with shared content

As soon as someone starts editing content, it is marked as currently being edited notifying other editors in order to avoid version conflicts.

Mark as being edited
Even if content is marked as being edited, it is still possible for another editor to select the **Edit Anyway** option, and continue working with the draft.

Permanently mark as being edited

The *currently being edited* markup setting is automatically cleared after some time. To keep this setting, you have an option to set a *permanently being edited* markup. This is done in the All Properties editing view by selecting **Tools > Permanently Mark as Being Edited**. This setting remains until manually disabled (toggle the setting to disable).

**Setting expiration of content**

Normally, web content never expires, but you can set pages and blocks to expire at a certain time in the future or immediately. Expired content is not displayed on the website but remains in Episerver CMS. You can remove the expiration from the content to make it appear on the website again.

Setting an expiration time is done in the All Properties editing view by selecting **Tools > Manage Expiration and Archiving**. Select **Now** if you want expiration to apply immediately.

**Archiving of expired content**

Episerver has a built-in archiving feature where pages with a set stop publish time are automatically moved to a defined archive branch when the time has passed. This is useful if you, for instance, have news pages in a listing where you want to remove old news from the listing, but still keep the pages. Archiving of expired content is done in the **Manage Expiration and Archiving** dialog box by selecting the page branch to which you want to move the expired page.
Managing content

Content on a website can originate from different sources, depending on where on the site and by whom it has been created. Content can be created "internally" by editors and marketers, or by merchandisers on an e-commerce website. Content can also be created "externally" by the visitor community through interactive social features on the website, if these are available.

Content can be pages and blocks in CMS, or product content from the catalog on an e-commerce site. Content can also be assets such as images and videos, or documents, for instance, in Word or PDF format. Episerver has a sophisticated version management features, allowing multiple editors to work with draft versions, before approving and publishing the content.

Draft content can be previewed before publishing, so that you can verify the content before publishing. When working with personalization, you can preview content the way it will appear for different visitor groups. To further limit access to content that is work-in-progress, you can also set access rights for content from the edit view.
If you have content in multiple languages on your website, Episerver has advanced features for managing translation of content into additional languages, including the use of fallback and replacement languages.

**Commerce-related content**

Refer to Managing e-commerce-related content in the Commerce User Guide, if you have Episerver Commerce installed.

**Optimizing content to improve search**

Refer to Working with content to optimize search in the Find User Guide, if you have Episerver Find installed.

**Projects**

A project allows you to manage the publishing process for multiple related content items. You can, for example, add a landing page, blocks, pages and products (if you have Commerce installed) to a project and publish them, manually or scheduled, at the same time. The projects feature supports management of content in different language versions, so you can manage translation of content items in projects as well.

In Episerver, there are two ways to work with projects. One way is to add the projects gadget to your user interface and the other one is to have an administrator enable the projects feature for the entire site.

Here is a short comparison of the two methods:

<table>
<thead>
<tr>
<th>Projects gadget</th>
<th>Projects feature</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accessible to all users who add the gadget.</td>
<td>Accessible only if an admin has enabled the feature from admin view.</td>
</tr>
<tr>
<td>The gadget is added to your own user interface and doesn’t affect other users.</td>
<td>The projects feature is either enabled or disabled for the entire site and affects all users.</td>
</tr>
<tr>
<td>Content needs to be manually added to a project.</td>
<td>Content is automatically added if a project is active.</td>
</tr>
<tr>
<td>Content associated with a project can be updated by other editors not using the Projects gadget.</td>
<td>Content associated with a project can only be updated within the context of the project (which means that if content is associated to a project, an editor who wants to edit that content needs to have that project active or create a new draft).</td>
</tr>
<tr>
<td>When the project has been</td>
<td>You can continue working with a project even after some or all items</td>
</tr>
</tbody>
</table>
Managing content

<table>
<thead>
<tr>
<th>Projects gadget</th>
<th>Projects feature</th>
</tr>
</thead>
<tbody>
<tr>
<td>published, it is obsolete and can no longer be used.</td>
<td>have been published.</td>
</tr>
<tr>
<td>All projects items must be set to Ready to publish before the project is published.</td>
<td>It is possible to multi publish only items set to Ready to publish and leave items not ready for a later time.</td>
</tr>
<tr>
<td>There are no collaboration features.</td>
<td>You can add comments to projects and items and receive email notifications on comments.</td>
</tr>
</tbody>
</table>

The projects gadget

A project allows you to manage the publishing process for multiple related content items, for instance, a landing page, blocks and products (if you have Commerce installed) that are parts of a campaign. Projects support management of content in different language versions, so that you can manage translation of content items in the project view as well.

You can create new content or create draft versions of existing content, associate the content items with a project, and then either publish the project immediately or schedule it for later publishing.

You need to add the projects gadget to the left or right pane to access the project features.

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Working with projects

Creating a project and adding content

Create a project from the gadget menu and add desired content items through drag-and-drop. You can either prepare the draft versions of the content items first, and then create the project and add them, or the other way around. Use Sort in the context menu to sort content items for a better overview, and the Refresh button to reload the view if multiple editors are working on the same project.

A specific content version can only be part of one project. If you try to add the same version to another project, you are prompted to create a new draft.

Previewing project content

The preview option in the top menu has an option for projects where you can browse through included items, preview them as if they were published, and update them if needed.
Publishing projects

To be able to publish a project, all included items must first be set to status “Ready to Publish”. You can do this for each item either from the publishing menu when editing, or from the context menu in the Project gadget.

When all items are ready for publishing, the entire project can be published. You can either publish directly, or schedule the project to be published later (if you have publishing access rights). If you need to change content in a scheduled project, select Remove Scheduling and Edit, change the content and re-schedule the project publishing. Published projects cannot be edited.

Removing content and deleting projects

Remove a content item from a project by selecting the item in the projects gadget and then selecting Remove from Project from the item's context menu. Removing a content item from a project means that it is no longer associated with the project but it is not deleted from the website.
Delete a project by selecting the project in the projects gadget and then selecting Delete Project from the gadget’s context menu. Projects are permanently deleted, but associated content items remain. When deleting a project scheduled for publishing, you have the option to either keep or remove the scheduling for each associated item.

EXAMPLE: Publishing a campaign using projects

We create a fashion sales campaign with multiple content items on a website with Episerver CMS and Commerce. The campaign will go live on a set date, and contain a landing page with a product listing block, two new products to be listed in the block, and a teaser block for the start page. We create the project first, and then add the content items.

1. In the Commerce catalog edit view, create a project for the campaign and name it "Spring Collection".
2. Prepare draft versions of the catalog items in Commerce, create and edit the catalog entries and add product descriptions and assets as desired. When done, drag the prepared catalog entries from the Catalog gadget to the Project gadget. Here the products are set to "Ready to Publish" before they are added to the project, but this can be done later.
3. Switch to the CMS edit view and create the landing page for the "Spring Collection". Add text and assets as needed, and drag the landing page to the "Spring Collection" project.

4. Create a block listing the products included in the spring collection, and include it in the landing page. Add the product listing block to the project.

5. Create a teaser block to be used on the landing page for promoting the new spring collection, and add the teaser block to the project.

6. Drag the teaser block to the start page, and add the start page to the project. The "Spring Collection" project now contains all the items to be included in the campaign.
7. **Preview** the content items in the project, edit as needed and set to "Ready to Publish" when done.
8. Schedule the project to be published on the defined go-live date for the campaign.

Versions of content items that are part of a scheduled project cannot be edited. Should you need to update, for instance, the start page before the scheduled project is published, you need to create a new draft and then publish this. If you need to incorporate the same changes into the scheduled project version of the start page, the scheduling must be removed to be able to edit.

EXAMPLE: Managing multiple content language versions using projects

In this example, we create a page with a registration form block for an event. The included items need to be available in English (the original website language), French and German, and we manage the translation using a project.

1. Create the page and the related forms block in English first.
2. Create a project and name it "Spring Meeting".
3. Add the English versions of the page and the forms block to the project.
4. Enable and activate the desired languages (here French and German) on your website, if not already done.
5. Switch to the French language branch and create a French version for the page and the forms block. Drag the French version of the content items into the "Spring Meeting" project.
6. Repeat the previous actions for the German language version. You now have six content items in the project, two for each language version.
7. Translate the content items into French and German respectively. Use `compare` to display the original English version when translating. Use `preview` to verify the different language versions of the content.

8. Set all the content items to "Ready to Publish" when done, and either publish the project or schedule it for later publishing.

---

**CMS**

**The projects feature**

A project allows you to manage the publishing process for multiple related content items. You can, for example, add a landing page, blocks, pages and products (if you have Commerce installed) to a project and publish them, manually or scheduled, at the same time. The projects feature supports management of content in different language versions, so you can manage translation of content items in projects as well.

---

In order to work with projects, the projects feature must have been enabled in the admin view.

Watch this Digital Marketing Projects video for a demo of the projects feature. (1:53 minutes)

**Project features:**

- The projects feature is either enabled or disabled for the entire site and affects all users.
- Editing actions, such as creating and updating items, automatically associate a content item with a currently active project. Exceptions to this rule are moving items in the structure, setting content to expired, changing access rights or language settings. These actions do not associate
content items with the active project.

Remember to deactivate the project when you no longer want to work with it. Items wrongly associated with a project need to be manually removed from the project.

» Content associated with a project is locked for editing if another project is active.
» It is a version of the content that is associated with a specific project. This means that you can have a published version of an item not associated with any project, one draft of the same item belonging to the project Summer campaign, and another draft belonging to the project VIP campaign.
» You can add, remove and update existing items even if some or all of the items within a project have been published.
» You can collaborate with other editors by adding comments, and replies to comments, to project items and to projects.

» The project interface consists of three main parts; the project bar at the bottom, the overview and the project items navigation pane to the left.

![Projects user interface](image)

**CMS Projects user interface**

**The project bar**

When the projects feature has been enabled by an administrator, a project bar is displayed at the bottom of the CMS window.
When you first access the edit view with the projects feature enabled, no project is selected in the project bar. When a project has been selected, it is preselected the next time you open the user interface.

If a project is active, that is, is selected in the project bar, all changes (creating a new page or block, updating existing content, uploading an image and so on) are automatically associated with that project.

If you select the option **None (use primary drafts)**, you can work with content items as usual without associating them with any projects.

From the context menu on the project bar, you can create, rename and delete projects.

If an active project is deleted, the project bar turns red. Associated items are not deleted but are no longer associated with a project.

**The overview**

From the projects bar, you can open an overview which displays all content items that are associated with the active project.
Each content item in the overview has a context menu from which you can set the item to *Ready to publish*, open it for editing and remove it from the project, providing you have **Edit** access rights. The context menu button is displayed when you hover the mouse over an item.

You can select multiple items in the overview and remove them from the project or set them as *Ready to Publish* all at the same time. Common mouse and keyboard functionality for selecting multiple items is supported, except for Ctrl + a which is not supported.

From **Options** in the overview, you can publish all items that are set to *Ready to publish* immediately or **schedule them** for publishing at a later time.

**Show comments** opens a view where you can select a project item and see a list of events connected to the item. You can add comments on each event and also reply to comments, see **Working with comments** for more information.

Use the **Sort** button to sort content items for a better overview, and the **Refresh** button to reload the view if there are multiple editors working on the same project.

**The project items navigation pane**

This can be used for quick access to items in the project. Double-click on an item to open it.
Each content item in the project items pane has a context menu displayed when you hover the mouse over an item; the menu options are the same as those in the project overview. It is also possible to select multiple items in the list the same way as in the project overview.

**Versioning when working in projects**

When opening an item, Episerver CMS displays the version that is set as primary, which does not necessarily have to be the latest version. You can see which version is the primary in the versions gadget; the primary version is marked with a target symbol 🌐. When the projects feature is not enabled, the primary draft is the latest edited version of the content.

When the projects feature is enabled, versioning works like this:

<table>
<thead>
<tr>
<th>Project 'X' is selected</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>and you create new content from scratch:</td>
<td>The draft is created and added to the active project automatically. Since this is the only version of the content, it is set as the primary draft.</td>
</tr>
<tr>
<td>and you update existing content:</td>
<td>Is the content a draft and associated with the active project?</td>
</tr>
</tbody>
</table>
### Project 'X' is selected

<table>
<thead>
<tr>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Yes:</strong> The draft is saved and still associated with the active project. Whichever version was the primary draft before is still the primary draft.</td>
</tr>
<tr>
<td><strong>No, the content is a published version or a draft not associated with the active project:</strong> A new draft is created and is associated with the active project. The previous version is still the primary draft. <strong>Note:</strong> If there is a previous draft within the project in the same language, the previous draft is replaced with this new draft as only one version can be associated with a project. The previous draft remains in Episerver as a draft but is no longer associated with a project. A draft of the same project item but in another language is not replaced as it is viewed as another version of the item. This means that you can have one draft in English and one draft in French of page 'Z' in the project 'X', but you cannot have two drafts in English of that page.</td>
</tr>
</tbody>
</table>

### None (use primary drafts) is selected

<table>
<thead>
<tr>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>and you create new content from scratch: The draft is created and set as primary draft.</td>
</tr>
</tbody>
</table>

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### Working with projects

#### Creating a project and adding content

New projects are created from the context menu on the project bar.

When the project has been created, it is automatically set as the active project which means that all editing changes you do (adding new content items, updating existing content, uploading an image and so on) are automatically associated with the project.

> A specific content version can only be part of one project. If you try to add the same version to another project, you are prompted to create a new draft. If you choose to create a new draft, the new version is then added to the project.

#### Editing content in projects

You will see a notification if the version you are working on is associated with the active project.

Content not associated with the active project but with another project is locked for editing. However, even if that version is locked for editing, you can still create a new draft with the New Draft from Here button in the yellow toolbar. That draft is associated with the active project, or to no project at all if None (use primary drafts) is selected.
If you want to make a change that should not be associated with the active project, you either have to select **None (use primary drafts)** or another project from the project bar. When **None (use primary drafts)** is selected in the project bar, you can create drafts, publish content and so on, as long as the content version is not associated with a project.

Content items that are part of a project remain so even after they are published.

**Uploading media to projects**

If you upload media while a project is active, it automatically associated with the active project.

Media is never auto-published when you upload it to a project, not even if your system is configured for auto publishing of media (see the **Auto publish media on upload** setting in System settings in the CMS Administrator Guide). Media associated with a project need to be published like any other content item.

**Previewing project content**

The **preview option** in the top menu lets you browse through the website as if the project were published. If you click the preview button, you preview the active project; to preview another project, change the project in the project bar.

**Collaborating on projects**

You can add comments on project items in the project overview and, for example, ask other editors to review an item. This feature is described in **Working with comments**.

**Publishing projects**

From the project overview, you can multi-publish items that are set to status **Ready to Publish**. Items can be set to **Ready to Publish** either from the publishing menu while editing an item, from the context menu in project overview or from the Project Items navigation pane. You can select multiple items and set them to **Ready to Publish**, both from the overview and the navigation pane.
When items are ready for publishing, they can be published from Options, if you have publishing access rights. You can either publish directly or schedule the project to be published later.

If the items in a project have been scheduled for publishing and you add new items to the project, the new content is not scheduled for publishing automatically. New content needs to be specifically set to scheduled time of publishing if you want it to be published at the same time as the other items in the project.

If you need to edit content that is scheduled, select Remove Scheduling and Edit, edit the content and reschedule.

You can continue working with a project after it has been published.
Removing content and deleting projects

Remove a content item from a project by selecting the item either in the project overview or from the project items navigation pane and then selecting **Remove from Project** from the item’s context menu. Removing a content item from a project means that it is no longer associated with the project but it is not deleted from the website.

Delete a project by selecting the project in the project bar and then selecting **Delete Project** from the context menu. Associated content items are not deleted but are no longer associated with a project. Deleted projects cannot be recovered. When deleting a project with items scheduled for publishing, you can either keep or remove the scheduling for each item.

**EXAMPLE:** publishing a customer event using projects

In this example, we will create an invitation to a customer event, including a registration form (using a block), a thank you for the registration-page, and a teaser block for the start page. All content items for the event will be scheduled for publishing at the same time.

1. Create a new project for the event from the project bar and call it **Customer event**.
2. Prepare a page with information on the event. The page is automatically added to the project. You can set the page to **Ready to publish** or do that at a later stage.
3. Prepare a thank you-page.

4. Create a registration form. On the sample site, this is done with a form block. Set up the form so that a visitor who registers for the event is directed to the thank you-page.

5. Create a teaser block to be used on the start page for promoting the customer event and drag it to the start page. The Customer event project now contains all items related to the event.
6. Preview the pages by clicking the preview symbol. Does the start page contain the teaser? Does it lead to the customer event detail page? Fill in the form and make sure that you are directed to the thank you-page.

7. Go to the overview and select all items by pressing Shift on your keyboard and selecting the top and the bottom items.
8. From the context menu of one the items, choose **Ready to publish** and all items are ready for publishing.

9. Select **Options > Schedule Items for Publish** in the overview.
10. Select 1 August at 11 AM and click **Select**.

You can not edit scheduled versions of items that are part of a project. Should you need to publish, for example, the start page before the scheduled version is published, you need to create a new draft and then publish this. To incorporate the same changes into the scheduled project version of the start page, you must remove the scheduling, edit the content and then re-set the scheduling.

**EXAMPLE: managing multiple content language versions using projects**

In this example, we will create a page with a registration form block for an event. The included items need to be available in English (the original website language), French and German, and we will manage the translation using a project.

1. Create a project and name it **Spring Meeting**.
2. Create the page and the related **forms** block in English first. They are automatically associated with the project.
3. **Enable and activate the desired languages** (here French and German) on your website, if not already done.
4. Switch to the French language branch and create a French version for the page and the forms block.
5. Repeat the previous actions for the German version. You now have six content items in the project, two for each language. You can see all six items in the Project Items navigation pane.
Note that a language code is displayed for items in other languages. In the image above, the English site is selected under Sites; therefore, items in English are not marked with a language code.

6. Translate the content items into French and German respectively. Use compare to display the original English version when translating. Use preview to verify the different language versions of the content.
7. Set all content items to *Ready to Publish* when done, and either publish the project or schedule it for later publishing from **Options** in the project overview.

**CMS**

**Working with comments**

The purpose of the comments feature when working with projects is to facilitate collaboration between editors. You can add comments on a project or on specific project items or actions. This way you can
add information on changes you have made, ask other editors to review the item and so on. Other editors can view your comments and reply to them, and also add their own. You can also tag users in a comment.

A comment is only connected to the current version. As soon as a new version of the project item is created, the comment connected to the previous version disappears.

If your system has been configured to use email notifications, you will receive an email when someone else replies to one of your comments or replies, or if you have, for example, set a project item to Ready to Publish and someone else comments on this action. You will also be notified if someone tags you in a comment. How often these notifications are sent depends on the system configuration.

Adding a comment to a project or project item

1. To add a comment to:
   ›› a project, select the **Project Comments** tab in the project overview.
   ›› a project item, select **Show comments** in the **Items** tab of the project overview and then a project item. Items that already have comments have a comment icon 🗣.

2. **Add** a comment in the comment text box. Note that you need access rights to the item in order to view and post comments.

3. To tag another user, enter @ followed by the user name. Select the user from the displayed list of suggested users. The tagged user will receive an email notification. Note that you can tag any of the available users but the tagged user still needs access rights to the project item in order to see the actual comment.
4. Press **Enter** or click **Post**.
Repeating to a comment

Click **Reply** on the comment you want to reply to and enter your comment in the text box. Press **Enter** or click **Post**.

Editing a comment or reply

You can edit comments and replies that you have created yourself. Click **Edit** on the comment or reply you want to change. Press **Enter** or click **Save**. Edited comments or replies are marked with a pen symbol ✒️.

Deleting a comment or reply

It is not possible to delete comments or replies yet.

**CMS** Structuring the website

In the Episerver CMS edit view under **Pages** you will find the page tree structure. At the top of the structure is the **root** page, usually with one or more start pages directly underneath. The structure of the website is made up of pages. By default, the page structure is reflected in the navigation menus. To simplify navigation, it is a good idea to limit the submenu structure to a maximum of three levels.
The page tree

By moving the mouse pointer over a page in the tree structure, information about the page, such as ID and page type, is displayed. A set of page tree symbols provides additional information about the structure.

- The root page.
- A start page.
- A published page.
- A page that links to another page on the same website.
- A page that fetches and displays content from another page on the same website.
- A page that links to an external website or a specific address.
- A page containing a shortcut which is not linked anywhere; it only displays the text. It is used to create a heading with no link in the menu.
- A container page used for storing other pages; not visible on the website.
- A published page. This icon is displayed for project items, not in the Pages navigation pane.
- A draft of a new page that has not been published yet.
- A new page that has been scheduled for publishing; not visible on the website yet.
- A page that has an expiration time set which has passed; not visible on the website.
- A page that is set to Ready to Publish.
- A page that is set to Rejected.
- A previously published page, not visible on the website.
- A page that is locked for editing for the logged-in user.
- A page that is being edited by another user.

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

Moving, copying and removing pages

Moving a page

Use drag-and-drop to move a page, or select Cut in the context menu for the page you want to move, and select Paste for the destination page. You can also move pages by using keyboard commands Ctrl+x or Cmd+x, and Ctrl+v or Cmd+v.

When moving a page, any internal links are redirected to the new location and are not broken. Any external links pointing to the moved page will be broken.
Copying a page

Select Copy in the context menu for the page you want to copy, and select Paste for the destination page. You can also copy pages by using keyboard commands Ctrl+c or Cmd+c, and Ctrl+v or Cmd+v.

All subpages and associated media files in local page folders will also be copied, and the links will point to the new copy of the page. Settings such as dynamic properties and categories, are also copied with the new page.

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

Removing content

Removed folders, pages, blocks and media files will be moved to trash, and will not be publicly available on the website, remember therefore to update any links to removed content. When removing a page, all underlying pages will also be removed.

Refer to Deleting and restoring content for more information.

Sorting page order in menus

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

1. Select the parent page of the branch in the structure where you want to set the sorting.
2. Edit the page and select the **Settings** tab.
3. Select sorting criteria under **Sort subpages**.
4. Publish the page in order for the changes to take place.

**Sorting according to sort index**

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

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

If you move a page into a branch that is not sorted according to sort index, you will get prompted to move the page and at the same time apply sort index as sort order for that branch. Confirm with **OK**. When you drag a page into a new position in a page tree branch, the sort index will
automatically be recalculated to fit the sort order of that branch.

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

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

Sorting according to sort index manually

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

Episerver has advanced support for restoring deleted content such as pages, blocks, folders and media files. When removing content, you do not delete it. Instead, you move it to trash. From there, you can either restore the content or permanently delete it.
Episerver Commerce does not support trash management when deleting catalog entries.

**Moving content to trash**

Select the content to delete, and select Move to Trash from the context menu.

Content that is moved to trash is automatically unpublished from the website. When moving content to trash, you receive a notification if the content is linked to from other content on the website, since the deletion might result in broken links.

Content versions are not supported by trash management. So, when deleting a version in the versions gadget, the version is permanently deleted.
Restoring content

Select View Trash from the pane settings in the navigation or assets pane. Select the desired content in the list and click Restore. The content is restored to its original place and republished. Content must be restored to be available for editing.

Deleting content permanently

Click Empty Trash to delete all content permanently (may require administrative access rights). Emptying of trash can also be done automatically at a regular time interval using a scheduled job.

Setting access rights from edit view

Website access rights are generally managed from the administration view. However, you can allow editors to set access right for a single page or a block from the edit view. This can be useful when you need to publish an item to verify the final result, but you do not want it to be publicly visible. Setting access rights from the edit view only affects the selected item (page or block).

To set access rights, open the item in the All properties edit view. The Visible to option displays Everyone for content that is publicly available on the website, and Restricted if access limitations apply.

Click Manage to change the settings in the Access Rights dialog:
If access rights are inherited from the parent page, clear **Inherit access rights from parent item**, and click **Add Users/Groups** to define new access rights. Add access rights as desired and save the settings.

Removing, for instance, read access for **Everyone** as in the example above, hides the published page from being visible to the public, but it is fully visible and editable for the **Site_Editors** group (as well as **Administrators**).

**Editors** must belong to a group with **Administer** access rights to be able to define access rights from the edit view. This setting does not provide access to any other administration options in Episerver CMS.

Refer to Access rights in the CMS Administrator User Guide for more information on how to work with access rights in Episerver CMS.
Assets can be, for instance, content of the type **media files**, images, documents, **blocks** or products from the catalogs in Episerver Commerce. Assets are available from the **assets pane** in both CMS and Commerce, making it easy to drag-and-drop items, such as images, blocks or products into, for instance, a CMS page.

You can work directly with content from the assets pane, for instance, edit images or blocks, or create folders to organize content items. The context menu will provide different options depending on the type of assets selected. How to work with content items in the assets pane is described in the sections **Folders**, **Media** and **Blocks**.

**By default, the assets pane in a standard Episerver installation will contain Blocks and Media with the addition of Catalog entries for Episerver Commerce.** Since the assets pane is a plug-in area, there might be other asset types available in your installation.

**Folders** in the **assets pane** in Episerver are used for organizing content, such as **media files** (for instance, images, videos and documents), as well as **blocks**. You can have folders with content that can be shared between all websites in a multi-site scenario, or you can have folders with content that will only be available for a specific website, or a page or block.
Note that by default, **media and blocks share the same folder structure**, meaning that if you create a folder under Media, the same folder is also created under Blocks.

Depending on your implementation, you may have the following predefined folders:

> **For All Sites.** Content here is available for all websites in a multi-site installation.
> **For This Site.** Content here is available only for a specific website in a multi-site installation.
> **For This Page or For This Block.** Local folder where content is available only for a specific page or block, and cannot be accessed from other pages or blocks. Useful, for instance, if you have images for a specific purpose which must not be used elsewhere.

If you have saved an image in the local folder and then copy the page content, including the image, and paste it into another page, you may still see the image in the page. However, this is due to browser caching, the image is not copied to the new page's local folder and the link is in reality broken.

Local folders are not available for catalog content in Episerver Commerce.
Creating, renaming and moving folders

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

Select Rename in the context menu for the folder you want to rename, and enter a new name.

Use drag-and-drop or Cut/Paste to move folders in the structure.

Renaming or moving folders does not cause any broken content links on your website, but might break incoming links from other websites or indexing from search engines.

Deleting folders

Select the folder you want to delete, and select Move to Trash in the context menu. The folder with its content will be moved to Trash, from where it can be restored. Local folders cannot be deleted.

Since blocks and media files share the same folder structure, removing a folder affects both the block and the media structure. You are notified about existing references to the content, before removing it.

Setting access rights for folders

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

Managing folders in multiple languages

Folders are not language specific, and the folder structure for blocks and media will look the same regardless of the language selected under the Sites tab in the navigation pane. This means that you cannot create language versions for folders, but you can, for instance, use a language code when naming them.

Media

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

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

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

Depending on your implementation, media files may not be automatically published when uploaded. To implement automatic publishing of uploaded media, editors who upload must have publish access rights for the folder to which the media is uploaded. Refer to Access rights in the content structure for more information.

Previewing media

Media files in list views are represented by thumbnail images. Common image file formats are rendered for preview by default in Episerver, but other rendering formats can be developed.

Downloading media

Select the desired media file in the Media structure, and select Download in the context menu. Or, if you are previewing the media file, select Download this file from the Options combo button.

Editing metadata for media

Available metadata fields depend on the implementation; for images they can be, for instance, photographer, description and copyright information. Select Edit for the desired media file in the Media structure, and then the All Properties editing view to edit the metadata properties.

Renaming media

Select the media file in the Media structure and then the All Properties editing view, and change the Name and the Name in URL.

Renaming a folder or media file changes its URL. This does not break internal links on the website, but incoming links from external websites may break.

Replacing media

To replace an existing media file with another, upload a new file with the exact same name to the same folder as the file you want to replace. A replaced media file is published immediately, affecting all places on the website where the file is used.
When replacing images, the changes may not be immediately visible due to website caching. Refresh the page to see the changes.

Managing media file versions

Versions for media files are managed in the same way as for other types of content, that is, by using the Versions gadget. Refer to Publishing and managing versions for more information.

Blocks

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

Blocks are managed from the Blocks tab under the assets pane in Episerver CMS, where you can create new blocks and organize them in folders. You can then utilize blocks by dragging them into the content area of Episerver CMS pages. You can manage block versions like other types of content, and blocks can also be personalized to be displayed for selected visitor groups.
Use the search field at the top of the pane to enter search criteria and retrieve blocks. Clicking a search result will expand the folder where the block is located. To browse for blocks, click a folder to expand the folders and content beneath it.

**Creating a block**

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

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

When using this option, the block is saved in the block folder structure, and it is available for other pages on the website.
1. Select the folder in the structure under which you want create a block, and select New Block in the context menu, or click the Add button.
2. Select the block type among those that are available, and provide a name for the block.
3. Depending on the type of block, add content as appropriate.
4. Publish the block immediately or schedule for publishing later. Unpublished blocks are not visible to visitors, and appear dimmed out in edit view when added to a content area.

Creating a block directly from a content area

When using this option, the block is saved in the For this page folder for the selected page, which means that it is not available on any other pages on the website.
1. Click **Create a new block** in the content area, either from the **On-page** or the **All properties** editing view.
2. Select the block type among those that are available, and then name the block.
3. Depending on the type of block, add content as appropriate.
4. Publish the block immediately or schedule for later publishing.

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

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

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

1. Select the desired block to edit, and select **Edit** in the context menu.
2. Depending on the type of block, change the content as appropriate.
3. If you want to rename the block, use the **All Properties editing view**.

Using blocks in content

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

You can add several blocks to the same area. Drag the block above or beneath an existing block, and drop it when the separator appears. The blocks can be rearranged later. It is also possible to add blocks to a content area from the **All Properties editing view**.
Like blocks, **pages** from the page tree can also be dropped into a content area. Depending on how the page template is built, the content of the selected page is rendered in the content area.

Blocks can also be added to a **rich-text editor area** through drag and drop.
To remove a block from a content area, select **Remove** from the context menu.

![Spring campaign block](image)

You can **personalize** blocks to display targeted information to selected visitor groups, see **Personalizing content**. Personalized blocks are not displayed in the edit view. Select a content area to display personalized blocks.

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

**Arranging blocks in a content area**

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

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

The following options are available:

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

Moving, copying and removing a block works in a similar way as for pages by using the context menu. Since blocks and media files share the same folders, removing a folder from the tree structure affects all content within the folder. If any block or media within a folder is used on the website, you are notified about the usage before the content is moved to trash.

A block is no longer available on the website once it has been moved to trash. You can see removed blocks by selecting View Trash from the context menu of the block gadget.

Versions, content languages and access rights for blocks

- **Versions** for blocks are managed in the same way as for other types of content. When you update the properties for a block, a new version will be created, which will be listed in the versions gadget. Refer to Publishing and managing versions for more information.

- **Content languages** for blocks are managed in the same way as for other types of content, refer to Translating content for more information.

- **Access rights** can be defined for creating and viewing blocks. This is done directly for a specific block in the All Properties editing view, or for an entire block structure from the admin view. From code it is also possible to restrict the block types that can be added to a content area. Refer to Setting access rights from edit view in this user guide and Access rights in the CMS Administrator User Guide for more information.

See also: Self-optimizing block in the online help.
Managing multiple languages

Many large websites display content in several languages. Episerver has powerful support for multi-language management, including the possibility to translate content into a wide range of languages, defining fallback languages for non-translated content, as well as switching language for the editorial user interface.

How does Episerver know which language to display to visitors? Episerver enforces the language to be visible in the URL, either in the path or the domain part of the URL. When a website visitor selects a language option (if available), content in that language is displayed. Alternatively, the preferred content display language may be detected by the browser used by the visitor. If content does not exist in a selected language, a fallback procedure may be applied.

Enabling content languages

Usually a website has a default or "master" content language set up at the time of installation. In addition to this, you may add multiple content languages as required for your website. The enabling of languages is done in the steps described below. Note that you need administrative access right to access the administration interface in Episerver CMS.

1. Enabling a language on the website

This step activates the language to make it available for further configuration in CMS and Commerce.

   1. In the admin view, go to the Config tab > Manage Website Languages.
   2. Click on the desired language in the list (you can add a language if the desired one is not available in the list).
2. Enabling a language for editing in CMS

This step makes the language you just enabled available for content creation by editors. A language can

3. Select the **Enabled** check box and click **Save**.

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be made available for the entire site structure, or for parts of it. By default, subpages inherit language settings from their parent page.

1. In the CMS page tree, select the root page for the branch for which you want to enable the language. In this example, we want "French" to be available for the entire site, so the language setting is defined on the start page.

2. Open the page in All Properties editing.


4. Under Available Languages, select Change.

5. Select the language you wish to enable, click Save, and close the dialog.

6. For a correct display, the website start page also needs to be available in the new language. To do this, switch to the newly activated language, go to the start page, select Translate, then publish it.
Once the language has been enabled as described above, it is available for content translation.

**User interface languages**

The Episerver user interface is available in a number of different languages. To set the desired user interface language for CMS, click your user profile name in the upper right corner. Select My Settings > Display Options tab. At the Personal Language drop-down, select the language of your choice, and click Save.

**Commerce and multiple languages**

Refer to Multi-language management in the Commerce section for information on how to work with multiple languages if you have Episerver Commerce installed.

**Find and multiple languages**

Refer to Optimizing multiple sites and languages for information on how to work with multiple languages if you have Episerver Find installed.

**See also**

- Refer to Translating content for information on how to translate CMS content into different languages.
- Refer to the Languages add-on for more information on how to extend the functionality in Episerver for translating content into multiple languages.

**Translating content**

When you have enabled the desired language, you are ready to translate existing content, or create new content in a specific language. Content here can be, for example, pages or blocks on an Episerver CMS website, or product-related content on an e-commerce site. When a language is enabled in Episerver, content properties that are not global are available for translation.
To prevent editors from accidentally creating content in the wrong language, access rights can be set for different languages. If this is implemented, you can only edit and create content in languages to which you have access.

Switching language and viewing language versions

- To switch language in CMS, go to the Sites tab in the navigation pane and select the desired language to work with. The user interface reloads, displaying the page tree in the selected language.

- You can also switch languages by selecting the desired language in the Header, when editing translated content in the All Properties view. The user interface reloads, displaying the content in the selected language.

- When translating content, you can use the Versions gadget in the assets pane to see the different language versions for the content. By selecting a language in the version list, you can also switch to editing in another language using the switch option in the notification bar.

- Use the compare view to translate in one pane while seeing the original version in the other pane at the same time.

- Using the preview feature in the "eye" at the top, you can view and edit content in one of the languages that are available for translation on the website.
You can search for all language versions for some content by typing a keyword in the search field for Pages or Blocks in the Asset pane.

It can sometimes be necessary to delete one or more language versions for content. This can be done in the Versions gadget by selecting Delete Version or Delete All [language] Versions.

Note that this delete action cannot be undone.

Translating existing content

The Sites tab displays the languages available for content creation, with the default language for the website at the top. Languages that have been enabled on the website but are not enabled for editing, are shown in italics.

Translating a page

By default, all pages in the tree structure are displayed in the Pages tab, including those that are not translated. These are shown in italics. To only see pages for the chosen language, select Show Content in [language] Only.

Do the following to translate a page:

1. Under the Sites tab in the left pane, select the desired target language for translation. The interface reloads, and you are taken to the Pages tab.

2. In the page tree, select the desired page to translate, and then click Translate in the notification bar at the top. Or, select Translate in the context menu for the page in the page tree.
3. Edit the content as desired and follow the normal content publishing flow to save and publish the translated page.

Translating a block

Language versions for blocks can be accessed from Blocks in the assets pane. By default, all blocks are displayed, including those that are not translated. These are shown in italics. To only see blocks for the chosen language, select Show Content in [language] Only.

Do the following to translate a block:

1. Under the Sites tab in the left pane, select the desired target language for translation, and the interface reloads.
2. Expand the Assets pane and select Blocks.
3. In the block structure, select the desired block to translate, and then the Translate option in the context menu.
4. Edit the content as desired and follow the normal content publishing flow to save and publish the translated block.

Global properties

Depending on your implementation, some properties may be “globally shared” and can only be edited in the master language. These properties are marked as non-editable when editing the content in another language. Switch to the default language if you need to edit these. The default language is usually the first language listed next to Languages in the header when editing in the All Properties view.
Creating new content in another language

To create content in a language other than the “master” language, select the desired language under the Sites tab. Then select the page branch or folder where you want to create the content, and create a new page or a new block. Add content as desired and follow the normal content publishing flow to save and publish.

Commerce Commerce and multiple languages

Refer to Multi-language management in the Commerce user guide for information on how to work with multiple languages if you have Episerver Commerce installed.

See also

- Refer to Multi-language management for information on how to work with multiple languages in Episerver.
- Refer to the Languages add-on for more information on how to extend the functionality in Episerver for translating content into multiple languages.

CMS Fallback languages

For many multi-language websites, only parts of the website content exist in all available languages. The reason can be that translations are not yet ready, content is not relevant for a specific language, or that some content should always display in a defined language.

You have the following options:

- Unless a fallback or replacement language is defined, content is invisible to visitors browsing the website in a language into which content has not been translated.
- Define a fallback language, in which the content is displayed until the content is available in the desired language.
- Define a replacement language, in which content is always displayed regardless of the language in which the content exists. If a replacement language is defined for some content, a fallback language does not apply.

Fallback and replacement languages may cause mixed languages to be displayed on the website.

Setting fallback and replacement languages

Fallback and replacement languages are defined from the All Properties edit view, when editing a page or a block and then selecting Tools and Language Settings.
Language settings are inherited from the parent page. If you are redefining language settings for a subpage to a parent page with language settings defined, you need to deselect Inherit settings from the parent page “xxx” in the Language Settings dialog, to define settings for the subsection.

EXAMPLE: fallback language

In this example, the "master" website language is English, and Swedish, Danish and Norwegian are enabled languages. Content is first created in English, and then translated into Swedish, Norwegian and Danish in that order. Swedish is used as first fallback for Norwegian and Danish. If content does not exist in Swedish (not translated yet), then a second fallback language "English" is applied.
EXAMPLE: replacement language

This is a multi-language website with a legal information section with content that should always be displayed in English. To ensure this, a replacement language is applied for the legal information page branch.
Another scenario for using replacement language is when you have started to translate content on your website, but do not want to have mixed languages until translation is completed. When translation is ready, you simply remove the replacement language.

**See also**

- Refer to Translating content for information on how to translate CMS content into different languages.
- Refer to the Languages add-on in the online user guide for more information on how to extend the functionality in Episerver for translating content into multiple languages.
Personalizing content

Personalization in Episerver allows you to target website content for selected visitor groups. You can, for instance, design a product banner, a landing page or a registration form specifically for first-time visitors, or for visitors from a geographic region or market.

The personalization feature is based on customized visitor groups, which you create using a set of visitor group criteria. Visitor groups must first be created to become available for selection when applying personalization.

There are numerous visitor group criteria available for usage across the entire Episerver platform. Refer to Administering visitor groups in the CMS Administrator User Guide for more information.

Working with personalization

You can personalize any type of content in the rich-text editor as well as in a content area. Personalize part of a text, an image, or a block in the rich-text editor, or personalize an image, a block or a page in a content area, if you have these in your web pages.

If you have multiple visitor groups, a visitor may match more than one visitor group. You can then use personalization groups to group content to avoid displaying the same content twice, and display fallback content to visitors who match no visitor groups.

The preview option in the top menu allows you to preview the personalized content as the different visitor groups will see it, before publishing.

Applying personalization

In the rich-text editor

1. Open the page for editing, and select the content you want to personalize in the editor area.
2. Click Personalized Content in the editor toolbar.
3. Add one or more visitor groups from the list.
4. **Preview** the personalized content to verify the result.

**In the content area**

1. **Open the page for editing**, and select the content you want to personalize in the content area.
2. Select **Personalize** from the **context menu**.
3. Select one or more visitor groups from the list.
4. Preview the personalized content to verify the result.

**Editing and removing personalization settings**

In the rich-text editor, click the edit button for the personalized content, and update the personalization settings, or select Remove Personalization.

In the content area, expand the desired Personalized Group section and click the desired visitor group link to edit the settings. To exclude content from personalization, drag it outside the group, or select Move Outside Group in the context menu.

**EXAMPLE**: displaying content to multiple visitor groups without fallback

In the rich-text editor
The non-personalized text at the top of the rich-text editor in this example is always displayed. The personalized text is displayed only to visitors matching any of the visitor groups “UK visitors” and “US visitors”.

In the content area

In this example, “Returning visitors” see one block, and “First time visitors” see another. Visitors not matching any group does not see anything in this content area.

EXAMPLE: displaying content to multiple visitor groups with fallback

We want to display specific price information to visitors from the UK and US, and other price information to visitors from other countries. To avoid displaying price information twice for visitors from the UK and US, we need to use a personalization group for fallback content.
The order in which the personalized content is placed within a personalization group does not matter, but placing the fallback content at the end makes it easier to follow the personalization flow.

In the rich-text editor

Select the fallback price information text and personalize it without selecting a visitor group. Instead create a “Pricing” personalization group and apply this.

Personalize the price information texts for the UK and US visitor groups, and include them in the “Pricing” personalization group as well. The personalization group is displayed to the right.
Now the personalization for this content is matched within the same personalization group.

In the content area

Here the pricing information are individual blocks, the “Default pricing” is the fallback content displayed to visitors from other countries than the UK and US. Select **Personalization** in the context menu for a block to create a personalization group, and drag the other blocks into the group.
Personalize each block within the group by applying the appropriate visitor group. Use the “Everyone” option to display the fallback content displayed to visitors not matching any visitor group.

**Providing access to content using visitor groups**

Visitor groups can be used for granting access to specific content. You can, for instance, make a page or a block accessible only to visitors from the UK, by providing access for the visitor group “UK visitors”. Refer to Access rights in the content structure in the CMS Administrator User Guide for more information.
Monitoring visitor group activities

Visitor group activities can be monitored by following the number of visits to personalized content. The result is displayed using the visitor groups statistics gadget on the Episerver dashboard. Refer to Gadgets for more information.

Personalizing Commerce content

If you have Episerver Commerce installed, there are additional visitor group criteria available specific for e-commerce scenarios. Refer to Personalization in the Commerce User Guide.
Reports

Reports are valuable tools for content editors, website owners, marketers and merchandisers, to monitor various website activities. Episerver comes with a set of built-in reports, and you can develop customized reports for your website.

Reports for CMS content

Reports for websites are used, for instance, to locate broken links and expired pages, or to get an overview of simple addresses used on the website. Reports are available from theReports option in the Episerver CMS global menu.

When generating a report, you select the desired report and the starting point in the page tree from where you want the report to include data, then click Show Report. Data can be filtered by time and language, and pages included in the report results open in edit view when you click on a page link.

These sample reports are available for Episerver CMS:

<table>
<thead>
<tr>
<th>Report</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not published pages</td>
<td>Not published pages displays unpublished pages that have a change date within a certain time span.</td>
</tr>
<tr>
<td>Published pages</td>
<td>Published pages displays pages that have a publish date within a certain</td>
</tr>
<tr>
<td>Report</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Changed pages</td>
<td>Changed pages displays pages that have a change date within a certain time span.</td>
</tr>
<tr>
<td>Expired pages</td>
<td>Expired pages displays pages with stop publish date within a certain time span.</td>
</tr>
<tr>
<td>Simple addresses</td>
<td>Simple addresses displays pages with a simple address.</td>
</tr>
<tr>
<td>Link status</td>
<td>Link status displays links that could not be contacted in the link check scheduled job.</td>
</tr>
</tbody>
</table>

Some reports rely on scheduled jobs running in the background for generating report data. Refer to Scheduled jobs in the CMS Administration User Guide for more information.

**Commerce Reports in Commerce**

Reports in Episerver Commerce are used, for instance, to follow-up on sales performance, or to monitor inventory stock information for products. Refer to Reporting in the Commerce user guide for more information, if you have a website with Commerce installed.
Managing gadgets

A gadget is a small application that can be made available for easy access from the dashboard or the assets and navigation panes in Episerver. There are built-in gadgets both for the Episerver platform as well as product-specific ones, for example, gadgets for forms viewing, visitor groups statistics, version management and the product catalog, if you have Commerce installed. As a developer, you can develop custom gadgets to extend the features of your Episerver solution.

Gadgets are managed in a similar fashion both on the dashboard and in the panes in edit view. Click the Settings icon to access the gadget management options.
Adding gadgets
Select Add Gadgets, and select a gadget to add from the list of available gadgets.

Rearranging gadgets
Select Rearrange Gadgets, select a gadget, and drag it to the desired position on the dashboard or in a pane.

Removing gadgets
Select Rearrange Gadgets, and click the Remove gadget symbol next to the gadget you want to remove from the dashboard or pane.

Built-in gadgets

Gadgets for the dashboard
- External links provides an overview of the external links of your website.
- Forms viewer allows you to monitor the activity for a specific web form.
- Notes allows you to add colorful “post it” notes to your dashboard.
- RSS feed reader shows the latest feeds from an RSS source of your choice.
- Visitor groups statistics is used to monitor visitor groups viewing personalized content.

Refer to dashboard gadgets for more information on how to edit the configuration settings for dashboard gadgets.

Gadgets for the panes in edit view
- Blocks is used to access blocks (default in the assets pane).
- Media is used to access media files (default in the assets pane).
- Projects is used to manage multi-publishing of content.
- Sites displays the page tree for the website.
- Recent displays items recently accessed by you.
- Tasks displays tasks to be done on the website.
- Recently changed displays recently changed content on the website.
- Versions is used to manage content versions. See also Publishing and managing versions for more information on working with versions.

Some gadgets are available by default in the user interface, while others need to be added manually.

Commerce Commerce-specific gadgets
Episerver Commerce comes with a set of e-commerce-specific gadgets.
Add-ons

Many add-ons are made available in the user interface as gadgets to extend the capabilities within various areas of Episerver.

Managing dashboard tabs

The Episerver dashboard, available from the top menu, is an area where you can add gadgets for presenting high-level information or provide quick access to common tasks such as viewing recently changed pages or monitoring a web form.

Tabs

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

Creating tabs

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

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

**Editing tabs**

Edit a tab on the dashboard as follows:

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

**Deleting tabs**

Delete a tab from the dashboard as follows:

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

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

**CMS Dashboard gadgets**

Episerver comes with a set of predefined **gadgets** which can be added to the personalized dashboard, for easy access by editors and website managers in their daily work. To edit configuration settings for these gadgets, add them to the dashboard, click the **Settings icon** and select **Edit**. Configuration options for each gadget are described below.
External links

This gadget provides an overview of the external links of your website. The list displays pages containing links to a specific external web address. This is useful if you want to find out to which external websites you are referring from your own website. You can choose to display the full URL for each link and the number of items to display in the list.

Forms viewer

This gadget lets you monitor activity for a specific web-based form, for instance a poll, a registration or contact form. This is intended not only for editors, but anyone who has an interest in the activities of your website, for example, a marketing or business area manager. The gadget displays a selected number of the latest activities, such as the latest votes or registrations to a form. The result can also be displayed graphically.
» Select the desired form to monitor on the website.
» The gadgets retrieve the fields available in the form, and you can select the ones to include in the monitoring.
» Select whether you want to display the post dates, and enter chart settings as desired.
» Select the updating frequency for the information in the forms viewer.
» The “Demo mode” provides a graphical demonstration view based on a built-in example form viewer “XFormsViewerGadgetDemo”.

Notes

Use this gadget to add colorful “post it” notes on the dashboard. Add the gadget to the dashboard, enter the text and select size and color for the information.

RSS feed reader

This gadget is used to display information from RSS feeds on the dashboard. The gadget shows the latest feeds from a selected RSS source. Add the feed URL, the number of items to show and a title for the feed.

Visitor groups statistics

If you are using personalization on your website, this gadget displays statistics for selected visitor groups viewing personalized content. By default, statistics are only counted once per session for each visitor group. This gadget can be used from the dashboard and the panes, as well as an iPhone or iPad.

» Select the type of chart to be used in the Statistic View section.
» Select the visitor groups (must be defined first) you want to include in your statistics.
» Filter the display by day, month and year.
» Click to select the start and end dates in the statistics interval.
Search

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

The search is based on the open source search engine Lucene, which is utilized by the different Episerver products when retrieving content. The search is provider-based, making it possible to extend and customize features. You can use the built-in basic search features, or create your own custom filtering methods and queries.

Built-in search features

The following built-in search features are included in Episerver:

- Full-text search features.
- Indexing of any type of content, such as document files, pages and blocks.
- Event-driven indexing, meaning instant updating of index and search results.
- Search results filtered on access rights.
- “Search-as-you-type,” enhancing the search experience.

Search options

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

- When editing, the global search is available in the upper right part of the global menu. Depending on the configured search providers, this option can search all types of content on the website—pages, blocks, files, and catalog content if you have Episerver Commerce installed.
When editing, a search option is available at the top of the navigation pane and assets pane, as well as in the link dialog. This option searches for content in the panes and related dialogs.
Searching in the CMS edit view is described in detail in the Finding content topic.

Visitors to the site can usually search content through a search field and a search page on the front-end site, as in the Episerver sample templates.

You can add items directly from the search result list to, for example, a page or a block through drag-and-drop.
Search tips

- Enter a few carefully selected keywords separated by space. If need be, narrow down your search query by adding keywords. For example: episerver product project.
- If you know a page ID, you can search for that page by entering the page ID in the search field.
- When searching for specific phrases, you can combine keywords using quotation marks. Example: “episerver search tips”.
- The search function is case insensitive, so you can use both upper and lowercase letters. Example: New York and new york return the same result.
- Similarly you can restrict the search by placing a minus sign - in front of the words that must not occur to consider the page a match, for example -episerver -search -tips.
- To match part of a word, place an asterisk * at the end of the word. Example: word1*word2 return content with the words word10, word123 and word2, but not word234.
- The boolean operators AND and OR can be used. AND means “I only want documents that contain both/all words”, OR means “I want documents that contain either word, regardless of which one”. Example: episerver AND search returns documents with both words, episerver OR search returns documents with either episerver or search.

Sorting search results

The sorting of search results is determined by the search algorithm, which can be customized in many ways. Often, filtering is applied to the results, which can be based on many factors, for instance, categorization of content.

Configuring search

Episerver search has configuration options which are managed from the administrative interface in Episerver CMS. Refer to Episerver’s technical documentation for information about search functionality, configuration possibilities, and integration interface.

Addons Extended search with Episerver Find

To build more advanced search features based on visitor behavior, customized filtering and faceted content navigation, you can add Episerver Find to your solution (requires license activation). Refer to the Episerver Find User Guide for more information.
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