Episerver CMS
Editor User Guide
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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.

Developer guides and technical documentation are also found on Episerver World.

Features, licenses and releases

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

**CMS**

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.

**Commerce**

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, multi-variate 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.
Features

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. Add-ons are usually installed on your website by a developer and you may have to
add them as gadgets to make them available in the edit view. Refer to the Managing gadgets section in the CMS Editor user guide for more information on how to work with gadgets.

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, and add-ons from Episerver. New features are continuously made available through Episerver updates.

This user guide (17-2) describes features added up until and including update 154 for Episerver; see Episerver World for previous user guide versions.

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<td>- A new field, Remaining URL, has been added to the Create/Edit link dialog box. In this field, you can add query string parameters to internal links. Read more about this in Adding links. (update 151)</td>
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<td>- A/B Testing: A new KPI has been added which allows you to select the total average order as a conversion goal. See A/B testing for more information. (update 151)</td>
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<td>- A/B Testing: A new KPI has been added which allows you to select a target page and a timeout period. An A/B test conversion is counted if a visitor goes from the target page to another page on your website within the defined time period. See A/B testing for more information. (update 152)</td>
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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.

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 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.

The page information area below the toolbar displays the page name, the path to the page and when it was last autosaved. If it is possible to undo the latest changes you did to the content, there is also an **Undo** link.

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.

Tooltips. Hover the mouse over a button or field and a short tooltip is displayed.

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. Drag and drop one or multiple items from the assets pane into the content you are currently working on.

You can also drag and drop multiple items within the assets pane, and delete, cut or copy and paste them, either from the context menu or with standard keyboard shortcuts. Any unselected children folders are also moved, copied or deleted.
If you copy and paste multiple folders on different levels, they will be on the same level when pasted.

**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:

- ![Click to select](image)
  - for instance, a category.

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

- ![Click to remove](image)
  - 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]

- **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.

Add-ons

An add-on is a plug-in or module, developed by Episerver or Episerver partners, to extend the capabilities of Episerver. A developer (or someone with administrative access rights) installs most add-
ons. See Episerver World for installation, configuration, and customizing details for each add-on.

When they have been installed on the website, some of the add-ons must be added as gadgets to become available for usage. You can add gadgets either to the dashboard or to the navigation or assets panes in edit view.

---

**CMS Working in On-page editing 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.

CMS 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. This topic describes 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 you can edit them only in the master language. See Translating content.

Basic info properties

The top gray area displays the basic informational 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 is copied with a number added to it. Change this if you create new content based on existing page copies.</td>
</tr>
<tr>
<td>Simple address</td>
<td>This is a unique URL that can be added to frequently requested pages on your website, letting visitors 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 lets you 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>
</tbody>
</table>

Changing the URL for an existing page may cause broken links.
## Tabs

All other properties are organized using **tabs**. These can be added and modified in code and 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.

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Display in navigation</strong></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><strong>Visible to</strong></td>
<td>Indicates if public access to the content is restricted. Click <strong>Manage</strong> to change these settings as described in Setting access rights from edit view.</td>
</tr>
<tr>
<td><strong>Languages</strong></td>
<td>Shows available languages for the content. If you have multiple languages on your website, see Working with multiple languages.</td>
</tr>
<tr>
<td><strong>ID, Type</strong></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>

© Episerver 2017
Property | Description
--- | ---
Category | Categorization of content is useful in filtering functionality for search, navigation and listings. You create a category in the administrative interface before you can apply it to content in edit view.

**Note:** A category is a built-in property in Episerver CMS. You can apply a category to content, but your website also needs customized functionality to display the resulting outcome, such as 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. See [Using the rich-text editor](#).
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><strong>Published, Created and Modified</strong></td>
<td>System-generated timestamps for the content that rarely need to be changed.</td>
</tr>
<tr>
<td><strong>Update modified date</strong></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, such as in a subscription send-out.</td>
</tr>
<tr>
<td><strong>Sort subpages and sort index</strong></td>
<td>Defines the sort order for pages in the page tree structure and navigation menus. See Structuring the website for information about structuring a website.</td>
</tr>
<tr>
<td><strong>Shortcut</strong></td>
<td>Creates menu or navigation links. A shortcut will not display any content of its own, instead it becomes 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>
</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 is 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. 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 is 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, you can customize and configure default values for selected properties, or to make certain properties mandatory for editors to fill in. See Properties in the CMS Administrator User Guide.

**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. See Managing content in the Commerce user guide.

**CMS** Assets

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.

**CMS** Folders

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 **media and blocks share the same folder structure**. This means 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**. This is called a global folder. Its content is available to all pages and blocks for all websites in a multi-site installation.
- **For This Site**. This is called a site-specific folder. Its content is available only on the current website (regardless of it is a single or multi-site installation).
- **For This Page** or **For This Block**. This is called a local folder. Its content is available only for a specific page or block and cannot be accessed from other pages or blocks. It is useful, for example, 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.

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**CMS**  **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. See Access rights for more information.

Inserting media

You can either add links to uploaded media files, or insert images and embedded media such as videos. For more information on these tasks, see Adding links, Adding and editing images and Adding embedded media.

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.
   
   If you want to rename the block, use the **All Properties editing view**.

3. Publish the block immediately or schedule for the changes to be published later.

**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.

![Image of a page with blocks being used]

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.

💡 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.

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>Use 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>Use 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>
</tbody>
</table>
| Text within content title or body                  | Use either the global search in the global menu or the search fields at the top of the navigation and assets panes.  
  - The global search can search all types of content on the website (depending on the configured search provider).  
  - Search fields in navigation and assets panes search for content in respective pane and related dialogs. |

See Search for search tips.
### What you know

**A page's status (for example, draft)**

Use the **Tasks** tab to find all content in that status.

### Action

<table>
<thead>
<tr>
<th>Draft</th>
<th>Download free trial form</th>
</tr>
</thead>
</table>

**Content was edited recently**

Use the *Recently changed* status in the Tasks tab or the **Recent** gadget. See [Managing gadgets](#) for information about adding this gadget.
Creating content

Content can be pages or blocks in Episerver CMS, or catalog entries in Episerver Commerce. This topic describes creating types of content in Episerver.

Creating a page

You create a page from page types that contain the properties where information is added.

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, such as 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.

Creating a block

You create a block in a similar fashion as a page.

1. Select Create new block from the Blocks tab in the assets pane, or from the add button on the toolbar, in which case you are prompted to define a location for the new block.
2. Select a block type from the list of available blocks.
3. Provide a name for the block.
4. Add information for the block.

You also can create a block directly from content areas in pages.

If you add a block directly from the content area, it is saved in the For this page folder, which means that it is available only on the selected page and cannot be used on other pages.

**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. See Managing content in the Commerce User Guide.

**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, and for catalog content if you have Episerver Commerce installed.

The Episerver sample templates come with a selection of activated editor functions (buttons). You can activate additional buttons from the administration view. You can drag and drop blocks into the editor area, and 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.
You can extend the styles list 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 you copy and paste text from external sources, you want to avoid including undesired formatting tags. You should 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** pastes 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** keeps 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 the page.

  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 is 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>
</tbody>
</table>
### Command | Shortcut keys
---|---
Italic | Ctrl+i or Cmd+i
Underline | Ctrl+u or Cmd+u
Copy | Ctrl+c or Cmd+c
Cut | Ctrl+x or Cmd+x
Paste | Ctrl+v or Cmd+v
H1–H6 headings | Ctrl+1–6 or Cmd+1–6
Paragraph break | Enter or Control+o
Line break | Shift+Enter

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

### Adding links

Links are used on websites to link to 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.
- **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.

You can also use **shortcuts**, a specific type of link used for navigation and reusing existing website information. See All Properties editing view.

### Creating a link

You can create a link in the rich-text editor through drag-and-drop (pages and media files), or by selecting text and clicking the **Insert/edit link** button in the toolbar, which displays the Create link dialog box.
Link title displays as descriptive text for the link, such as on mouse-over.

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

Language lets you link to a specific language version for content. Automatic directs visitors to the detected browsing language version.

Overview of creating different types of links:

<table>
<thead>
<tr>
<th>Create link:</th>
<th>How to:</th>
<th>Detailed info, see:</th>
</tr>
</thead>
<tbody>
<tr>
<td>to page in CMS</td>
<td>Drag and drop from page tree. or From Create link dialog box, select Page or External link.</td>
<td>Linking to a page on the same website</td>
</tr>
<tr>
<td>to page on another website</td>
<td>From Create link dialog box, select External link.</td>
<td>Linking to a page on an external website</td>
</tr>
<tr>
<td>to file in CMS</td>
<td>Drag and drop from Media folder. or From Create link dialog box, select Media.</td>
<td>Linking to files in Media</td>
</tr>
<tr>
<td>to file on file server or another website</td>
<td>From Create link dialog box, select External link.</td>
<td>Linking to files on a file server or an external website</td>
</tr>
</tbody>
</table>
Create link: | How to: | Detailed info, see:
---|---|---
to email address | From Create link dialog box, select E-mail. | Linking to an email address
to specific location on a page (anchor link) | Insert anchor from toolbar, and then from Create link dialog box, select Anchor. | Creating anchor links
from image | From Create link dialog box, select any of the Page, Media, E-mail or External link option. | Linking from an image

Linking to a page on the same website

You can create internal links in two ways:

- 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 becomes the link name (which you can edit, if needed).
- Or, select the text where you want the link in the rich-text editor, and click Insert/edit link. In the Create link dialog box, you can either select the Page option and browse to a page to link to, or select the External link option and paste a web address (URL) to a page on your website. If you choose the External link option, Episerver automatically converts the link to an internal link.

Remaining URL

The Remaining URL field is used to add, or edit, query string parameters. A query string is a dynamic part of a link and is not related to the website structure. It can be data from a logged in user, data from a form submission, search result data etc. A typical URL containing a query string can look like this: http://www.alloyexamplesite.com/Search/?searchQuery=reseller. The query string parameters (in bold) following the URL open the search results for “reseller”.

To create an internal link containing query string parameters, create the link in the Create link dialog either using the External link option and pasting the entire web address with the query strings parameters or using the Page option. In that case, browse to the page and then add the query string parameters under Remaining URL.
Linking to a page on an external website

Select the text where you want the link in the rich-text editor, click Insert/edit link, and use the External link option to enter the web address to the website to link to, such as http://www.alloyexamplesite.com.

If you create an external link to a page found on the website you are working on, for example, by copying and pasting a URL from the website, Episerver recognizes this and automatically converts it to an internal link. Note that if the link contains query strings parameters, the query string parameters can be edited in the Remaining Url option. See Linking to a page on the same website.

Linking to files in Media

You can create links to media in the Media folder in two ways:
Place the cursor in the rich-text editor where you want the link, and drag the desired file (PDF, 
Word and so on) from a Media folder into the location. The filename becomes the link name 
(which you can edit, if needed).

Select the text where you want the link in the rich-text editor, click Insert/edit link and use the 
Media option to select a media file to link to.

You can create a link to any type of document, but the behavior when a website visitor clicks 
the link depends on the file format and the settings of the visitor's computer.

**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 Insert/edit link 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 filename with file extension. 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 Insert/edit link and use the email 
option to enter the email address to link to. When you click the link, the default email client opens 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 Insert/edit link and add a link using any of the Page, 
Media, External link or Email options.

**Creating anchor links**

When you add an anchor, first create the anchor and then add the link to it from the Create link dialog 
box.

1. Place the cursor in the text in the rich-text editor where you want to place the anchor. 
2. Click Insert/edit anchor and enter a name for the anchor. Do not use special characters or 
spaces. 
3. Select the text in the rich-text editor where you want the link to the anchor. 
4. Click Insert/edit link and use the Anchor option to select the anchor to link to.

**Link properties**

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

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Image link

When you add images to content areas intended for images or blocks and so on, instead of adding the image in the rich-text editor, you can use an image link property which lets you select an image from a folder in Media, automatically placing it properly in the content area. See Adding and editing images.

Link collection

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

You can create links by dropping pages or media files in the link collection area, or by creating links through the link dialog. You can create links for pages, media files, external sources and email addresses. You can move links to change the order in which they appear.
You can also edit the displayed name of the link.
**Commerce**  Linking to catalog entries

If you have Episerver Commerce installed, the link dialog box contains an option to select items from the product catalog when you create links. See Manage content in the Commerce user guide.

**CMS**  Adding and editing images

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

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

You also can add images 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:

- In the rich-text editor, click the image and then select Image Editor in the toolbar.
- Locate the desired image in Media, and select Open in Image Editor from the context menu.
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>
## Image editing

<table>
<thead>
<tr>
<th>Image editing</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Image to crop.</strong> Note: Remember to click <strong>Apply</strong> to save the changes before proceeding.</td>
<td></td>
</tr>
<tr>
<td><strong>Resize</strong></td>
<td>Enter values for <strong>Width</strong> and <strong>Height</strong>, or move a corner handle to resize, keep <strong>Constrain proportions</strong> selected to retain the image proportions. Note: Remember to click <strong>Apply</strong> to save the changes before proceeding.</td>
</tr>
<tr>
<td><strong>Transform</strong></td>
<td>Flip or rotate the image, or select <strong>Grayscale</strong> to convert to grayscale.</td>
</tr>
<tr>
<td><strong>Preset values</strong></td>
<td>Apply preset values for cropping and resizing, if such values are configured for the website.</td>
</tr>
</tbody>
</table>

You can save an edited image file as a copy, or replace the original file:

- **Save as a copy.** If the image was selected in a page or block, the copy is saved in the local folder. If the edited image was selected in the media structure, the (renamed) copy is saved in the same folder as the original.
- **Replace original image.** This action affects 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.

Removing an image makes it disappear from the content, but it remains in **Media**.

### Changing image properties

You can control the display of images in the **rich-text editor** through a set of properties.

Some of these properties (Dimensions, Vertical/Horizontal space and Border) are not supported in HTML5. If your website is configured for HTML5, you do not see unsupported properties in the dialog box.
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. Click Update to save your changes.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dimensions</td>
<td>Change the display size of an image. Ensure that Constrain proportions is selected to keep the image proportions. Enter the width of the image in pixels, and the height is changed accordingly.</td>
</tr>
<tr>
<td>Class</td>
<td>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.</td>
</tr>
<tr>
<td>Vertical space and Horizontal space</td>
<td>Add a value in pixels for the space between the image and the surrounding text if it is not handled by the CSS class. For example, this might be useful if you have a large amount of text on a page and want to place an image in the top right corner with the text floating around it with some space padding between the image and the text. The preview window lets you see the result of the different options you choose.</td>
</tr>
<tr>
<td>Border</td>
<td>Add a value in pixels for the image border if it is not handled by the CSS class.</td>
</tr>
<tr>
<td>Style</td>
<td>In the Style field, you can add inline styling. However, it is recommended to use CSS classes.</td>
</tr>
</tbody>
</table>

5. On the Advanced tab, you can change any of the following. Click Update to save your changes.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alternative image</td>
<td>Add 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.</td>
</tr>
<tr>
<td>ID</td>
<td>Set a unique identifier for the image that you can reference by style sheets or by a JavaScript providing additional functionality.</td>
</tr>
<tr>
<td>Language direction</td>
<td>Set the language direction (left to right or right to left) for the description, title and other text attributes specified for the image.</td>
</tr>
<tr>
<td>Language</td>
<td>Set the desired language if you have an image showing content in a different language.</td>
</tr>
</tbody>
</table>
## Option Description

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>code</td>
<td>language than the actual page. Enter the standard language code format, such as it (Italian), es (Spanish), en (English) and so on.</td>
</tr>
<tr>
<td>Image map</td>
<td>Associate an image map with the image. Image maps map certain areas of an image to links or other actions. There is currently no built-in way to create image maps in TinyMCE.</td>
</tr>
<tr>
<td>Long description link</td>
<td>Type a link to provide a longer image description than what fits in the description field. Most visual browsers do not support this feature; this is primarily an accessibility feature.</td>
</tr>
</tbody>
</table>

### CMS Adding embedded media

Adding embedded media to content works in the same way in both Episerver CMS and Episerver Commerce. Embedded media can be, such as 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 information about other formats such as Quicktime, Windows Media, and Real Media, see available accessibility coding standards.

> Depending on the type of media you select on the General tab, the attribute options vary on the Advanced tab. For information about Flash movie attributes, see available accessibility coding standards.

Insert embedded media as follows:

1. Place the cursor in the editor area where you want to insert your video or animation.
2. Click Insert/edit embedded media on the editor toolbar.
3. In Type, select the type of media and associated format, such as Flash, Quicktime or Windows Media. Flash is the 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 is 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

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

### Flash options

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

Add dynamic content 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.

For example, you can use dynamic content to display company facts and figures that are reused on multiple pages of a website. You also can combine dynamic content with a visitor group; see Personalizing content.

Dynamic content is not enabled by default. An administrator must enable it in the administration view. If it is not enabled, you will not see the Dynamic content button on the editor toolbar.

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. An Episerver CMS standard installation includes the Page property plug-in, which 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 from which you want to display data. In this example, you fetch data from the Main body property of a page.
5. Optional: In Personalization settings, you can click + to select the visitor group you want to have access to the dynamic content.
<table>
<thead>
<tr>
<th><strong>Type</strong></th>
<th><strong>Page property</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Description</strong></td>
<td>Inserts the content from a specific property on a selected page.</td>
</tr>
</tbody>
</table>

**Settings**

- **Page to insert content from**
  - [Contact us](#) [3.8]
- **Property to insert content from**
  - [Teaser text]

**Personalization Settings**

- **Select the visitor group(s) that should see this content**
  - No group selected

Personalization groups are used to group personalized pages targeting different groups of visitors. You can add multiple personalization groups by clicking the plus button. A page can belong to multiple personalization groups.

6. Click **OK**. The dynamic content appears as a box in the editor area. When this property is updated, all dynamic instances of the property in the content are 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 Using the built-in forms functionality (Legacy)

This topic describes the built-in forms functionality in Episerver CMS which is available through a form property. The form property is added to a page template or a block during implementation. On the
Episerver sample site, the forms functionality is made available through a Form block.

This functionality can still be used on older versions of Episerver but we recommend you to use the new block-based Episerver Forms add-on.

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 box, from where you can view all web-based forms on the website, organize them in folders and use them in content. You can place forms in a selected folder when you edit or create them. You can delete form folders but you can only delete empty folders.

- Click Edit to edit an existing form. You can save the existing form with a new name to keep the original.
- Click Delete to delete a form. You also can delete forms from within the Edit Form dialog box.
- 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.
Click **Delete Column** to delete the selected column.

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 also can drag a desired property into the selected form table cell. You can add only one field in each table cell. Depending on the selected field type, properties are 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>
<tr>
<td>Field property</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<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 appears that 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 are 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 are 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 Description

- **Check Preselected** to indicate an option that will be selected by default.
- You can change the order in which the options are displayed in the list.

**Button**

- 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 saves 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.

**Heading**

- Adds a heading describing what should be entered, for example to explain sections of large forms.

**Horizontal rule**

- Inserts a horizontal rule into the form, for example to split large forms into sections.

### 3. Completing the form

When you complete the form, enter values for the following 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, and in the subject row in any email messages sent.</td>
</tr>
<tr>
<td>Form folder</td>
<td>The location where the form is stored.</td>
</tr>
<tr>
<td>Form can be sent</td>
<td>This option allows anonymous visitors to post the form. If deselected, vis-</td>
</tr>
<tr>
<td>Form property</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>without logging in</td>
<td>Visitors need to be logged in to the website to post the form.</td>
</tr>
<tr>
<td>Same person can send the form several times</td>
<td>This option allows the same person (that is, computer user) to post the form multiple times. If deselected, the form can be posted only once per computer.</td>
</tr>
<tr>
<td>Page shown after the form has been sent</td>
<td>Link to a confirmation page following a form posting.</td>
</tr>
</tbody>
</table>

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 is 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**

You can export forms between Episerver CMS websites. When you export a form, an XML file is 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**.
Managing content

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 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.

Content on a website can originate from different sources, depending on where on the site and by whom it was created.

- Editors and marketers, or merchandisers can create content internally, on an e-commerce website.
- A visitor community member can create content externally through interactive social features on the website, if these are available.

You can preview draft content before publishing, so that you can verify the content before publishing. When working with personalization, you can preview content the way it appears for different visitor groups. To further limit access to content that is work-in-progress, you also can 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

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

Optimizing content to improve search

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

Working with multiple languages

Many large websites display content in several languages. Episerver has powerful support for multilanguage 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 the master language, your website may have been set up with multiple other content languages. The enabling of languages is done by an administrator, see Managing website languages in the Episerver Administrator User Guide.

Administrators can also set up different access rights to different languages. This means that you may have access to English and French content, but not to German and Spanish.

▷ Refer to Translating content for information on how to translate CMS content into different languages.
▷ You can also use the Languages add-on for translating content.

**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** 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** Episerver 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.

**CMS** Translating content

When an administrator has 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. See [Global properties](#) for more information on global properties.

To prevent editors from accidentally creating content in the wrong language, access rights can be set differently for different languages by an administrator. If this is implemented, you can only edit and create content in languages to which you have access.

See also [Languages add-on](#) for information about extending the functionality in Episerver for translating content into multiple languages.

**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.

If your master language is English and you switch to Swedish, all pages that have not yet been translated into Swedish are displayed in italics in the page tree and with the `en` language code for English. Pages that exist in Swedish are displayed in normal font.
To view only pages that have been translated, select **Show Content in Current Language Only** from the page tree’s **Settings** button. This filters out all other language versions. You can also use this option in the assets pane and in the Versions gadget to view blocks and versions in the current language only.

When you show content in one language only, you can move pages to another location in the page tree structure by drag and drop or copy and paste, but it is not possible to sort pages. Sorting is disabled since sorting in one language, where you may not see all pages, can cause unexpected result in other languages.
The setting **Show Content in Current Language Only** is enabled for each pane or gadget instance individually. This means that you, for example, can add the Versions gadget twice and display only the current language in one of the instances and all languages in the other.

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 you translate content, you can use the **Versions gadget** to see the different language versions for the content.

By selecting a language in the version list, you also can switch to editing in another language using the switch option in the notification bar.
You can search for all language versions for some content by typing a keyword in the search field for **Pages** or **Blocks** in the assets pane.

**Previewing content in different languages**

Using the view settings in the "eye" 🎫 in the top menu, you can **preview** and edit content in one of the languages that are available for translation on the website.
Deleting language versions

To delete one or more language versions for content, select **Delete Version** or **Delete All [language] Versions** from the **More options** button in the **Versions** gadget.

Deleting one or more language versions 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 are 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 Current Language Only**.

Do the following to translate a page:

1. Under the **Sites** tab in the navigation 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. You can use the compare view to translate in one pane while seeing the original version in the other pane at the same time.
4. Edit the content and follow the content publishing flow to save and publish the translated page.

Translating a block

You can access language versions for blocks 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 Current Language Only.

To translate a block:

1. Under the Sites tab in the navigation 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. You can use the compare view to translate in one pane while seeing the original version in the other pane at the same time.
5. Edit the content and follow the content publishing flow to save and publish the translated block.
Global properties

Depending on your implementation, some properties may be “globally shared” and you can edit them 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 and follow the content publishing flow to save and publish.

Commerce and multiple languages

See Multi-language management in the Commerce user guide for information about working with multiple languages if you have Episerver Commerce installed.

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 is not 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 you define a replacement language 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 dialog](image)

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 example shows a multi-language website with a legal information section with content that always should 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

- Translating content for information about translating CMS content into different languages.
- Languages add-on in the online user guide for information about extending the functionality in Episerver for translating content into multiple languages.

### Personalizing content

Personalization in Episerver lets you target website content for selected visitor groups. For example, you can 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 across the Episerver platform; see Administering visitor groups in the CMS Administrator User Guide.

**Working with personalization**

You can personalize any type of content in the rich-text editor and 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 then can 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 lets you 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. Select 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 **edit** 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 that do not match any group do not see anything in this content area.

EXAMPLE: displaying content to multiple visitor groups with fallback

You 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, you 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.

![Personalized Content dialog box](image)

Personalize the price information texts for the UK and US visitor groups, and also include them in the "Pricing" personalization group. 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**

This example shows pricing information as individual blocks, and 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**

Administrators can also grant access to specific content using visitor groups. For example, the administrator can make a page or a block accessible only to visitors from the UK, by providing access for the *UK visitors* visitor group; see Access rights in the CMS Administrator User Guide.
Monitoring visitor group activities

You can monitor visitor group activities by following the number of visits to personalized content. The result is displayed using the visitor groups statistics gadget on the Episerver dashboard; see Gadgets.

Commerce Personalizing Commerce content

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

Add-ons Personalization using add-ons

- You can watch the following demonstration video, Personalizing content with Episerver and the Eloqua database. (2:15 minutes)

- You can watch the following demonstration video, Personalizing content with Episerver and HubSpot. (2:34 minutes)

- You can watch the following demonstration video, Personalizing content with Episerver and Marketo. (2:56 minutes)

CMS Previewing content

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 that is not set to primary draft, in which 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 projects feature is enabled. In that case,
### View setting options

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>case, the preview button displays the active project. To preview another project, you need to change the active project.</td>
</tr>
</tbody>
</table>

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 you compare content, the On-page edit view displays two page versions side-by-side. 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 appears 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 is 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 is 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 you compare content, the *On-page edit view* shows two versions side-by-side. You can scroll and resize the panes.

When you edit a published version in the left pane, a new draft is 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 is 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 also can 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 you select to compare all properties, the All Properties editing view displays the two compared versions of the properties side-by-side. They are displayed in the same tabs as they usually are, with the exception of the Basic info properties, which 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 appear 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 is used in the newer version also. When you edit a published property, a new draft appears in the version list.

### CMS Setting access rights from edit view

Administrators generally manage website access rights from the administration view. However, if you have **administer** rights, you can set access rights for a single page or a block from the edit view. This is 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.
For example, removing read access for **Everyone**, as in the example above, hides the published page from the public, but it is fully visible and editable for the **Site_Editors** group (and **Administrators**).

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

See Access rights in the CMS Administrator User Guide for information about working with access rights in Episerver CMS.

### Structuring the website

In the Episerver CMS, the page tree structure is located in edit view under **Pages**. 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, you should 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 that is not linked anywhere; it only displays the text and 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 appears for project items; not in the Pages navigation pane.
- A draft of a new page that is not yet published.
- A new page that was scheduled for publishing; not visible on the website yet.
- A page that has an expiration time that has passed; not visible on the website.
- A page that is set to **Ready to publish**.
- A page that is set to **Rejected**.
A page is currently In review and must be reviewed and approved before it can be published. See Content approvals (Beta).

You do not have the rights to publish this item or the specific item version does not exist anymore. This icon appears for project items; not in the Pages navigation pane.

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 be 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 you move a page, internal links are redirected to the new location and are not broken. However, 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.

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

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

Removing content

Removed folders, pages, blocks and media files are moved to trash, and are not publicly available on the website. Remember to update any links to removed content. When you remove a page, all underlying pages are removed also. See Deleting and restoring content.

Sorting page order in menus

The pages in the tree structure are sorted according to a predefined sort order. By default, the page that was created most recently is placed at the top of the tree structure, for example, in news listings.
also are 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.

![Sorting options in Episerver CMS](image)

The sort order is set for the parent page of a branch, and is inherited by 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 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. Then give each child page a unique sort index number, and they are 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 is only 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 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 is automatically 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 is first moved or copied, and then sorted. The page remains in the tree in the position where it was first dropped.

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

**Sorting according to sort index manually**

You can set the sort index 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. You should work with whole tens or hundreds to insert additional pages in between existing ones in the structure. 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 you remove content, you move it to trash; you do not delete it. 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, because 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. You must restore content to edit it.

Deleting content permanently
Select View Trash from the pane settings in the navigation or assets pane. Click Empty Trash to delete the trash content permanently (may require administrative access rights). You can automatically empty the trash at a regular time interval using a scheduled job.
Working with 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, and 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.

You can watch the following demonstration video, Video: Publishing content. (4:18 minutes)

For information on how you can control the publishing process by using content approvals, project or access rights, see Controlling the publishing process.

**Publishing actions**

When you create or update content, you can perform a number of actions to create drafts, undo changes, set content ready for review, publish directly or schedule publishing at a later stage, and so on.

**Creating drafts and autosaving**

Whenever you create new content or edit existing content, a **draft** version is automatically created. 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 still will have only 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.
Undoing and reverting to published

While editing, clicking the **Undo** option in the page information area lets you undo changes to content that was previously autosaved.

- Select **Undo** to discard the changes done since the last autosave.
  
  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, and so on, 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 was 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; see Previewing.

You also can compare different content versions by using the Compare version option in the top toolbar; see Comparing versions.

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 apply. Click View on website to view the content as it appears on the website.

You can also republish on older version of a page, see section Managing versions for more information.

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 lets you take back content for further editing after sent for approval.

Setting Ready for Review

If your site has been set up to use content approvals, your content may have to be approved by one or more approvers before it can be published. In that case, you do not have the Publish? option, and you have to set the content to Ready for Review when you are done. Doing this starts the approval sequence. When all approvers have approved the content, you are notified and you can publish the content or schedule it for late publishing. See section Content approvals (Beta) for more information.
Approving and publishing

If you have publishing access rights, you can approve and publish changes for content with the status Ready to publish. You also can 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 you need to edit the content again before it can be ready for publishing. You can monitor content status and related tasks 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, and 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 to interrupt the scheduled publishing and continue editing the selected version.

Selecting New Draft from Here creates a new draft, based on the scheduled version, which is still 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.

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 you can perform from the version list by using the More options button found at the bottom of the version list. Click the column headers to sort the version list according to language, status and more.

Viewing versions

Content can have the following status in the version list:

- Draft. Content that is a work-in-progress and is not yet subject to any publishing actions.
- Published. The most recently published version and the one publicly displayed. Only one published version can exist.
» **In review.** Content must be approved before it can be published. For more information, see [Content approvals (Beta)].

» **Previously Published.** One or more versions that were published before the latest published version.

» **Ready to Publish.** Content awaiting approval and publishing.

» **Rejected.** The content has been set as *Ready for Review* or *Ready to Publish* and an approver has rejected the content. You can edit and update the rejected content and then set it to *Ready for Review* or *Ready to Publish* again.

» **Delayed Publish.** Content scheduled to be published at a specified time.

» **Expired.** Content where a stop publish date and time is set and passed.

You can define the number of stored content versions in the administration view. The default setting is 20.

### Setting the primary draft

Versioning works differently if you are working with projects. For a more detailed description on how Episerver handles versioning in projects, see [Versioning when working in projects].

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.

Use the **Set as Primary Draft** option in the version list to make another draft the primary one.
A content item that is not published can have only one draft. You can create multiple drafts from published versions, each draft is editable individually and you can schedule for publishing at different times. 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 you delete 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. You can disable the ability to delete versions in the administration view.

Managing language versions
If the selected content exists in multiple languages, language versions are displayed with a language code. To filter versions for a desired language, select **Show Content in Current Language Only** in the version list.

![Version list](image)

**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.

![Republishing](image)
Unpublishing content

Unpublished content in Episerver CMS is content that has not yet been published or content that you for some reason do not want publicly visible on the website.

There is no Unpublishing option in the user interface; instead, you have the following options to hide published content from being publicly visible on your website:

- Set the content item to expired if you want to keep it for reference or future use.
- Remove the 'Everyone' access rights to it.
- Delete the content item if you do not want to keep it.

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. For example, this is useful if you have news pages in a listing where you want to remove old news from the listing, but still keep the pages. Archiving expired content occurs in the Manage Expiration and Archiving dialog box by selecting the page branch to which you want to move the expired page.
Working with shared content

As soon as you start to edit content, the content is marked as *currently being edited* notifying other editors to avoid version conflicts.

Mark as being edited

Even if content is marked as being edited, another editor can 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 can set a permanently being edited markup through the All Properties editing view by selecting Tools > Permanently Mark as Being Edited. This setting remains until manually disabled (toggle the setting to disable).

A/B testing

A/B testing is an add-on and requires a separate installation, as it is not included by default in an Episerver installation. The A/B testing add-on requires no additional license.

A/B testing lets you create variations for a number of page elements (blocks, images, content, buttons, form fields, and so on), then measure the number of conversions obtained from the original (control) versus the variation (challenger). The one that generates the most conversions during the testing period is typically promoted to the design for that page, which can help you maximize your website’s ROI. You can use actual, timely data to drive decisions by finding the combination that most effectively compels site visitors to take the next step.

You can watch the following demonstration video, A/B testing. (5:07 minutes)

How it works

You want to know whether a different advertisement can generate more interest from your site visitors so you create two versions of an advertisement button image that links to a target page.
1. When a visitor views an A/B test page, the visitor sees either the original (A / Control) or the variation (B / Challenger) page. A/B testing logs which version the visitor sees.

   If a visitor returns to the test page, the visitor sees the same page (A or B) throughout the duration of the test. Each visitor gets a view of either A or B but not both. However, if they clear cookies, and revisit the test page, they are considered a new visitor in the test.

2. If a visitor clicks on the image, the target page appears and A/B testing logs the action as a conversion. (The target page may contain a form that a visitor submits to get a promised award.)

3. When the test duration completes, the version that achieves the best results is declared the winner of the test.

4. Depending on your site configuration, you can manually pick a winner (usually the one with most conversions), which publishes that version, or the winner is automatically published when the test completes. Test winners are only automatically published if the test results are statistically significant.

**Starting an A/B test**

1. Start with a published version of a page or block as the original (A / Control). For example, you have a site devoted to air travel tips and want to get visitors interested in exploring your site. Will a fancy graphic button (variation) entice more click-throughs than a plain button (original control) that says *Click here for more information?*

2. Edit the content, such as changing an advertisement button, or some text. For example:

<table>
<thead>
<tr>
<th>Image on page A / Control:</th>
<th>Image on page B / Challenger:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Click here for more information</strong></td>
<td><strong>Visit our NEW travel site today!</strong></td>
</tr>
</tbody>
</table>

3. Select *Publish? > A/B Test changes.* Do not publish the changed page. The A/B test view appears showing A / Control and B / Challenger thumbnail images.
Flight Fancy A/B Test

Determine whether new or changed content improves the conversion rate.

A / Control

B / Challenger

Test goal

Which button will entice visitors to explore more of the website?

Conversion goal

Participation percentage

More participation reduces time to gather statistics and pick a winner.

Test duration

Start test

- Start immediately
- Schedule for later
4. Configure your A/B test by setting the following options:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Test Goal</td>
<td>Enter your hypothesis for the test. This is for your information only.</td>
</tr>
<tr>
<td>Conversion goal</td>
<td>Select the key performance indicator (KPI) that you want to measure.</td>
</tr>
<tr>
<td></td>
<td>» <strong>Landing page.</strong> Select a target page to which visitor is taken when the visitor clicks through. Only a click-through is counted as a conversion.</td>
</tr>
<tr>
<td></td>
<td>» <strong>Site stickiness.</strong> Select a target page and a timeout period (1-60 minutes). The A/B test counts a conversion if a visitor goes from the target page to any other page on your website during the set time period. If the visitor closes the browser and then opens your target page again within the specified time period, a new page view is not counted. However, a conversion is counted if the visitor goes from the target page to another page during the second visit.</td>
</tr>
<tr>
<td></td>
<td>» <strong>Add to cart.</strong> Select a product a site visitor can add to a cart. If a visitor adds that product to a cart, it is counted as a conversion.</td>
</tr>
<tr>
<td></td>
<td>» <strong>Purchase product.</strong> Select a product a site visitor can buy. If a visitor buys that product, it is counted as a conversion.</td>
</tr>
<tr>
<td></td>
<td>» <strong>Average order.</strong> Select this KPI to track completed orders on each of the test pages. The KPI totals up the values of all Commerce carts created by visitors included in the A/B test. The test determines which page variant creates the highest average value for all those carts when picking a winner. If a visitor creates multiple carts, all the (purchased) carts are included in the total, which means that the visitor can “convert” many times in the test duration. On Commerce websites using different currencies, the test runs a calculation to convert all carts into the same currency.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> You need Episerver Commerce to use Commerce-related KPIs such as <strong>Add to Cart, Purchase Product</strong>, and <strong>Average Order</strong>.</td>
</tr>
<tr>
<td>Participation percentage</td>
<td>Enter the percentage of total amount of traffic to your A/B test. If you set it at 100%, then half of all visitors get page A and the other half get</td>
</tr>
<tr>
<td>Option</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Option</strong></td>
<td><strong>Description</strong></td>
</tr>
<tr>
<td>page B. However, you may not want that many visitors to see page B because you may not want half of your visitors to see something on page B that might be unsuccessful. By lowering the participation percentage, you might limit exposure of a risky test. Therefore, lowering the percentage increases the number of people who see page A, and only the percentage of people included in the test count in the statistics.</td>
<td></td>
</tr>
<tr>
<td><strong>Test duration</strong></td>
<td>Specify the number of days you want the test to run.</td>
</tr>
<tr>
<td><strong>Start test</strong></td>
<td>Select one of the options. You can stop the test at any time before the number of specified days are done.</td>
</tr>
<tr>
<td>&gt;&gt;&gt; Start test immediately</td>
<td>Select this option and click Start Test after you specified the test parameters.</td>
</tr>
<tr>
<td>&gt;&gt;&gt; Schedule for later</td>
<td>Select this option; a date picker appears. Select a date and time to start the test. Click the Schedule test button.</td>
</tr>
<tr>
<td><strong>Advanced Options &gt; Confidence level</strong></td>
<td>Select the confidence level of statistical significance you want from the results that you gather. For example, if you select a 98% confidence level, the test results report whether your results are significant at the 98% confidence level.</td>
</tr>
</tbody>
</table>

5. When you are done, click Start Test.

**Viewing an A/B test**

1. To view a running A/B test, open the page you are testing, and click View Test on the notification bar.

A version of this content is part of a running A/B test. View test

The test results are displayed and a flame graphic shows which page is leading the test.
Beneath the two page thumbnails you can view the currently collected test data, such as number of conversions and conversion rate. The conversion rate can be either a percentage rate or an amount, if you are using theAverage Order KPI. (The pie chart is not displayed for Average Order KPI.)

If a visitor returns to the test page, the visitor sees the same page (A or B) throughout the duration of the test, and no matter how many times the visitor views the page or clicks through to the conversion goal, it counts as one view and one conversion.

2. You can select the following actions from theOptions menu:

   **Pick The Winner.** If you see enough data before the test completes, you can stop the test and pick a winner. For example, perhaps the changed page is a clear runaway winner such that another few days of testing may not significantly affect the result.

   If you select **Pick The Winner**, the Pick the Winner page appears. Click **Pick The Winner** and it is automatically published. (The leading page is highlighted in green)
you have selected a winner), the loser is added to the **Versions** gadget as a historical artifact.

![A/B Test Example](image)

**Abort A/B test.** Stop the test and discard the results.

**Managing A/B tests**

You cannot edit the test settings or the content of a page when the test is running because you could possibly invalidate any of the results. If you need to change the test settings or something on the pages, you must cancel the test and make your changes, and start the test over. Click **Abort A/B Test** from the **Options** menu.

Use the **Tasks** tab in the navigation pane to manage A/B testing-specific actions.
Active Tests. Displays links to active test pages that are collecting data. Click an item to display the test page where you can click the View test link to display the snapshot of result data.

Archived Tests. Displays the content that has had an A/B test run against it.

Completed Tests. Displays links to completed tests. Data is no longer being collected. A winner is not yet chosen. Click a link to pick a winner.

Scheduled Tests. Displays links to tests that are ready to run on a schedule.

For other statuses in the Tasks bar, see Controlling the publishing process.

Setting default values for A/B testing

Administrators can set the default values and decide if a test winner should be automatically published or not. See A/B Testing configuration in Tool settings in the CMS Administrator Guide.
Controlling the publishing process

Large organizations with geographically distributed editors often benefit from process support when creating, reviewing, publishing and translating content. Episerver is built for a distributed way of working, with various options for managing content creation and publishing depending on the size and setup of organizations.

The following features can be used to control the publishing process:

- **Content must be approved before it can be published**
  
  Content approvals is a way to make sure that content is reviewed and approved before it is published. When an editor has finished working on a content item, the item is set to **Ready for Review**. One or more appointed reviewers must then approve the content item before it can be published. The reviewers are defined by an administrator in an approval sequence.

- **Publish multiple related content items at the same time**
  
  The projects feature and the projects gadget let you preview and publish multiple content items at the same time, such as a landing page, blocks and products (if you have Commerce installed) that are part of a campaign.

- **Restrict publishing access rights**
  
  Access rights let you control what editors can do where in the content structure. A typical example is to restrict the right to publish content to editor groups. This means that the publish option is not available for editors. Instead, they use the “ready to publish” status option. You can then view the content under Tasks.

- **Use the Tasks pane**
  
  The simplest way to monitor content creation activities is to use tasks. The Tasks option lists changes to content filtered by content status.
You can use the following options for monitoring content creation and content approvals:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Draft</td>
<td>Lists all draft versions on the website.</td>
</tr>
<tr>
<td>Rejected</td>
<td>Lists all content items that have been set as Ready for Review or Ready to Publish but have been declined. You can edit and update content in status Rejected before you set it to Ready to Publish or Ready for Review again.</td>
</tr>
<tr>
<td>In Review</td>
<td>Lists all content items that are set as Ready for Review. See Content approvals (Beta) for more information.</td>
</tr>
<tr>
<td>Ready to Publish</td>
<td>Lists all content items that are set as Ready to Publish.</td>
</tr>
<tr>
<td>Marked as Being Edited</td>
<td>Lists all content items that someone is currently working on.</td>
</tr>
</tbody>
</table>
### Table

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recently Changed</td>
<td>Lists the last items that have been changed for the website by you or any other editor.</td>
</tr>
<tr>
<td>Pending Approval</td>
<td>Lists the content items that you have sent for review and are in content status In Review.</td>
</tr>
<tr>
<td>Declined Requests</td>
<td>Lists the content items that you have sent for review and are declined items in content status Rejected. As soon as the item is updated, it is not displayed in this list anymore.</td>
</tr>
<tr>
<td>Approved Requests</td>
<td>Lists the content items that you have sent for review and are approved, that is in content status Ready to Publish. As soon as the item is published (or updated), it is not displayed in this list anymore.</td>
</tr>
<tr>
<td>Awaiting Your Review</td>
<td>Lists the content items that you are one of the designated approvers of.</td>
</tr>
<tr>
<td>Approved by You</td>
<td>Lists the content items you have approved. As soon as the item is published (or updated), it is not displayed in this list anymore.</td>
</tr>
</tbody>
</table>

Clicking on a content item in the filtered task list displays the item in the main area. Use the *versions gadget* to see the version history for that particular content item. If you have publishing access rights, you can decide upon further publishing actions from the versions gadget.

If you are using A/B testing, you see a number of tasks related to this feature in the Tasks list. The available options under Tasks can also have been configured specifically for your website by a developer.

---

**Content approvals (Beta)**

This feature is released as a Beta feature, which means that it is under development.

Content approvals is a way to make sure that content is reviewed and approved before it is published. When an editor has finished working on a content item, the item is set to Ready for Review. One or more appointed reviewers must then approve the content item before it can be published. The reviewers are defined by an administrator in an approval sequence.

### Sequences and reviewers

An approval sequence can be set up with any number of approval steps and any number of reviewers in each step. The sequence is set up by an administrator; as described in Managing approval sequences.
in the CMS Administrator Guide.

The approval sequence administrator also defines, for each step individually, who can approve a content item. It is possible to have only one person as reviewer in a step, but it is recommended to have at least two (per language) in case one of them is unavailable.

As soon as one of the reviewers in a step approves the content, that step is considered completed and the item moves to the next step in the approval sequence. When a content item enters an approval step, the reviewers in that step are notified by email and in the user interface that they have an item to approve. The editor who started the approval sequence is notified when the last reviewer approves the content item and it is set as **Ready to Publish**, or if an reviewer rejects the content item. When the content has been approved in all steps, it is automatically set as **Ready to Publish**, and anyone with publishing rights can publish it.

The approval sequence overview is opened from a page’s or assets folder’s context menu:

![Approval Sequence Context Menu](image)

Editors can normally view an approval sequence but not change it. If an administrator has set an approval sequence on a node in the page tree, editors without administrator rights cannot by-pass the approval sequence. The **Publish** button is replaced by a **Ready for Review** button, and setting a content item to **Ready for Review** starts the approval sequence.

**Content approvals on assets**

Each page in Episerver can have its own content approval sequence. Assets, such as blocks and media (and also forms and catalogs if you have Episerver Forms and Episerver Commerce respectively installed), cannot have individual approval sequences. Instead, the content approval sequence is set on each assets folder, and all assets in a folder have the same approval sequence set. **Global** and **site-specific assets folders** can either inherit their approval sequence from a parent folder, or an administrator can define a unique sequence for it (or disable it completely so that assets in the folder do not have to be approved). **Local assets folders** always inherit their approval sequence from the page they are associated with. See **Folders** for a description of global, site-specific and local folders.

What happens if I want to move folders or assets that have content approval sequences set?
Moving folders and assets that have content approval sequences set, works like the following descriptions.

**Folders**

- Moving a **folder** to another **global or site-specific folder**. The folder keeps its original approval sequence. You can move the folder even if items in the folder are in review.
- Moving a **folder** to a **local assets folder**. The folder's approval sequence is changed to the local assets folder's sequence. You cannot move the folder if items in the folder are in review.

**Assets**

- Moving an **asset** to a **global or site-specific folder**. The approval sequence on the asset is changed to the new folder's approval sequence. You can move an item even if it is in review. However, in that case, it continues its original content approval sequence until it has been either approved or rejected. After that it has the same approval sequence as the new folder.
- Moving an **asset** to a **local asset folder**. The approval sequence on the asset is changed to the new folder's approval sequence. You cannot move the asset if it is in review.

The Blocks and Media folders in the assets pane are actually the same folders in the software and share the same content approval sequences; the Blocks and Media tabs in the assets pane are merely a way of filtering out blocks if you are in the Media tab and vice versa. This means that if Adam is set as a reviewer on block folder Bunnies, Adam is also a reviewer of all media in media folder Bunnies.

As a result, if you edit a block in the Bunnies folder which links to images in the media folder Bunnies, and set the block to **Ready for Review**, the same content approval sequence is triggered also for the images.

Forms and catalogs have their own structures, so even if you have a Commerce catalog named Bunnies, it does not get the same content approval sequence as the Bunnies folders for blocks and media.

Assets added to an assets folder with a content approval sequence set are not auto published, even if the auto publish option is set (see Auto publish media on upload in the CMS Administrator User Guide).

If you are working on a multi-language site, items such as images that do not have a language set can be approved by any reviewer (even by reviewers that only have access to a specific language).

Example: You have a site in English and German (where English is the master language) and you have set up the approval sequence so that reviewer Julia is responsible for the German content items but not the English items. You keep a folder with the two images Party_teaser_EN.png and Party_teaser_DE.png for an English and a German version, and Julia is a designated reviewer in the approval sequence on this image folder. Julia can then approve all images in the folder even if the Party_teaser_EN.png is only used on English pages, which she does not have access to.

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Multiple languages

If you have content in more than one language, each language must have at least one reviewer. The administrator decides whether a reviewer can approve content for all languages or for specific languages. Therefore, it is possible to have different reviewers for different languages.

Each language version can be set as Ready for Review and approved separately from the other language version. This means that the German version of an item can be approved in three approval steps and published before the French version has even passed approval step 1. See Translating content for more information on working with different languages.

Example: Content approval sequence with multi-languages

In this example, there are three reviewers in step 1, one for each of language (this is for simplicity only, in reality you should have at least two reviewers per language). In step 2, there are two reviewers, who have access rights to approve all languages. If one of the reviewers declines the content, that language version is set as Rejected and needs to be set as Ready for Review again.

Approval rejections

If a reviewer does not approve a page and rejects it, the page returns to being an editable draft (with status Rejected). The responsible editor must update the page and set it to Ready for Review again. The approval sequence then starts over, and the reviewer of the first step in the approval sequence must approve it again, even if that reviewer had approved the first draft and it was a reviewer in a later step who rejected the page.

Notifications and tasks

If you have started a content approval sequence by setting an item to Ready for Review, or is set as a reviewer, you receive notifications in the user interface. The bell icon in the toolbar displays the number of new notifications you have; click the icon to display a list of notifications. From the notification list, you can go to the item that needs to be reviewed.
If your system is configured to use email notifications, you will also receive an email; how often these notifications are sent depends on the system configuration.

<table>
<thead>
<tr>
<th>Notifications are sent when:</th>
<th>To:</th>
<th>Notification message:</th>
</tr>
</thead>
<tbody>
<tr>
<td>an item is set to <strong>Ready for Review</strong>.</td>
<td>the reviewers in the first step.</td>
<td>&quot;Awaiting your approval or one of Z others. Step X of Y&quot; (if there are multiple reviewers in the step) or &quot;Awaiting your approval. Step X of Y&quot; (if there are only one reviewer in the step).</td>
</tr>
<tr>
<td>an item has been <strong>approved</strong> in a step.</td>
<td>the reviewers in the next step.</td>
<td>&quot;Awaiting your approval or one of Z others. Step X of Y&quot; (if there are multiple reviewers in the step) or &quot;Awaiting your approval. Step X of Y&quot; (if there are only one reviewer in the step).</td>
</tr>
<tr>
<td>all steps have been <strong>approved</strong> and the item is set as <strong>Ready to Publish</strong>.</td>
<td>to the user who started the content approval sequence.</td>
<td>&quot;The reviewed content has been approved and is now ready to publish.&quot;</td>
</tr>
<tr>
<td>a content approval step has been <strong>declined</strong>.</td>
<td>to the user who started the content approval sequence, and to all reviewers in current and previous steps.</td>
<td>&quot;Declined by <em>username</em>&quot;.</td>
</tr>
<tr>
<td>a content approval sequence has been <strong>cancelled</strong>.</td>
<td>to all reviewers in current and previous steps.</td>
<td>&quot;Review request canceled by <em>username</em>&quot;.</td>
</tr>
</tbody>
</table>

To keep track of the content items you have sent for review, items that are waiting for your approval or items you have already approved, use **Tasks** in the navigation pane.
These are the options related to content approvals. For a description of all options, see Use the Tasks pane in Controlling the publishing process.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>In Review</td>
<td>Lists all content items that are set as Ready for Review.</td>
</tr>
<tr>
<td>Awaiting Approval</td>
<td>Lists the content items that you have sent for review and are in content status In Review.</td>
</tr>
<tr>
<td>Declined Requests</td>
<td>Lists the content items that you have sent for review and are declined, that is in content status Rejected. As soon as the item is updated, it is not displayed in this list anymore.</td>
</tr>
<tr>
<td>Approved Requests</td>
<td>Lists the content items that you have sent for review and are approved, that is in content status Ready to Publish. As soon as the item is published (or updated), it is not displayed in this list anymore.</td>
</tr>
<tr>
<td>Awaiting Your Review</td>
<td>Lists the content items that you are one of the designated reviewers of.</td>
</tr>
</tbody>
</table>
Option | Description
---|---
Approved by You | Lists the content items you have approved. As soon as the item is published (or updated), it is not displayed in this list anymore.

**What happens if a reviewer is away and cannot approve?**

To avoid content getting stuck in an approval step if a reviewer is unable to approve, it is recommended that you have at least two reviewers (per language) in a step.

An administrator can always approve and publish a page.

Administrators and the editor who started the approval sequence can cancel the approval sequence at any step.

**Example: Content approval sequence in two steps**

Web editor Tina works in the Marketing department and has prepared a new product launch. An approval sequence has been set up for the Marketing pages, and when Tina is done, she does not have the **Publish** option. Instead, she must set the new product page to **Ready for Review**. The page is now locked for further editing and according to the predefined approval sequence, one of the company’s chief editors Alicia and Carlos, must review and approve the page. Alicia and Carlos are notified with an email and also when they log in to Episerver CMS that they have a page to approve.

When either one of Alicia and Carlos has reviewed the page, they approve it.

The approval sequence now states that Steve or David needs to approve the page. They are both notified by email and in the user interface. As soon as one of them has approved the page, it is set to Ready to publish. The approval sequence is now done and any editor (or administrator) with publishing rights to the content can publish it. Tina, who started the approval sequence, is notified.

If Steve or David declines the approval, the content is set as **Rejected** and Tina must update it and set it to **Ready for Review** again. Alicia or Carlos will then have to approve the second draft as well.

---

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Working with approval sequences

Starting an approval sequence

If an approval sequence is defined for the content you are working on, you cannot publish directly. Instead, you have to start the approval sequence by clicking Publish? > Ready for Review.

When a content item is in review, its status changes to In review in the Versions gadget. Until it has been approved in all steps of the approval sequence, it is locked for editing. When it has been approved in all steps, it is set as Ready to Publish, and you are notified of this both in the user interface and by email.
Approving an approval step

If you are set as reviewer for a content item, you are notified in the user interface and by email when this content item is ready for review. When you have reviewed the content item, click Approve? > Approve Changes. The content item now moves to the next step in the approval sequence, or if you were the last reviewer in the sequence, it is set as Ready to Publish.

![Awaiting your approval](image)

Declining an approval step

If you are set as reviewer for a content item, you are notified in the user interface and by email when this content item is ready for review. When you have reviewed the content item, and do not want to approve it, click Approve? > Decline Changes. The content item is set as Rejected and the editor needs to update the content and set it to Ready for Review again.

Canceling an approval sequence

You can always cancel an approval sequence that you have started regardless of which step the content item is in. Click Options > Cancel Review Request and Edit. You can now edit the content again. When done, you have to set it as Ready for Review and the approval sequence starts over from step 1.
Projects

A project lets you manage the publishing process for multiple related content items. For example, you can 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. Projects support management of content in different language versions, so you can manage translation of content items in projects.

In Episerver, there are two ways to work with projects.

- Add the projects gadget to your user interface.
- Use the projects feature if it is enabled for the entire site. Enabling and disabling of the projects feature is done in code by a developer.

The following table shows a comparison of the two methods:

<table>
<thead>
<tr>
<th>Projects gadget</th>
<th>Projects feature</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accessible to users who add the gadget.</td>
<td>Accessible only if it is enabled for the entire site.</td>
</tr>
<tr>
<td>Added to your own user interface; does not affect other users.</td>
<td>Enabled or disabled for the entire site and affects all users.</td>
</tr>
<tr>
<td>You need to add content manually to a project.</td>
<td>Content is automatically added if a project is active.</td>
</tr>
<tr>
<td>Other editors (not using the Projects gadget) can update content associated with a project.</td>
<td>Content associated with a project can only be updated within the context of the project. (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 is published, the project</td>
<td>You can continue working with a project even after</td>
</tr>
<tr>
<td>Projects gadget</td>
<td>Projects feature</td>
</tr>
<tr>
<td>-----------------</td>
<td>------------------</td>
</tr>
<tr>
<td>is obsolete and can no longer be used.</td>
<td>some or all items are published.</td>
</tr>
<tr>
<td>All project items must be set to Ready to publish before the project is published.</td>
<td>You can publish multiple items that are set to Ready to publish and leave items that are not ready for a later time.</td>
</tr>
<tr>
<td>There are no collaboration features.</td>
<td>You can collaborate on projects by adding comments to projects and items.</td>
</tr>
</tbody>
</table>

**CMS The projects gadget**

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

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.
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 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 Refresh 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 from the publishing menu when editing, or from the context menu in the Project gadget.

When all items are ready for publishing, you can publish the entire project 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**

This example creates a fashion sales campaign with multiple content items on a website with Episerver CMS and Commerce. The campaign will go live on a specified 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. You 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.
3. When done, drag the prepared catalog entries from the Catalog gadget to the Project gadget where you set the products to **Ready to Publish** before they are added to the project, but you can do this later.

4. 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.

5. 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.

6. 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.

7. 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.
8. **Preview** the content items in the project, edit as needed and set to **Ready to Publish** when done.
9. **Schedule** the project to be published on the defined go-live date for the campaign.

You cannot edit versions of content items that are part of a scheduled project. For example, if you need to update 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, remove the scheduling to edit.

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

This example creates 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 you 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. (Must be done by an administrator.)
5. Switch to the French language branch and create a French version for the page and the forms block.
6. Drag the French version of the content items into the *Spring Meeting* project.
7. Repeat the previous actions for the German language version. You now have six content items in the project; two for each language version.
8. 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.

9. 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 lets you manage the publishing process for multiple related content items. For example, you can 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.

The projects feature may have been disabled on your site, in which case you do not see the project bar at the bottom of the user interface and you cannot use the feature.

You can watch the following demonstration video, **Managing contents with the projects feature.** (5:20 minutes)

**Project features:**
The projects feature is 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.

A version of content 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 a Summer campaign project, and another draft belonging to a VIP campaign project.

You can add, remove and update existing items even if some or all of the items within a project are 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

The project bar

When the projects feature is enabled by a developer, 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 you select a project, 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 you delete an active project, the project bar turns red. Associated items are not deleted but are no longer associated with a project.

The project overview

From the projects bar, you can open an overview that displays content items associated with the active project.
The overview shows details such as name, content status, content type, and time and date for latest change of each content item.

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

The project items navigation pane

The project items navigation pane provides 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. You can select multiple items in the list the same way as in the project overview.

**Versioning when working in projects**

Add the versions gadget to your user interface if you are working with multiple drafts and projects to see a list of the different versions.

It is only *one version of a page* that is associated with the project. This means you can have a published version of a page and several drafts, and any one of these versions can be associated with the project. If the associated version is the published version, the project overview displays **Published** for that item. If it is not the published version, the overview displays **Draft, Previously Published, Expired** and so on.

You can only have one published version, so if you publish another version of the page (that is, a version that is not associated with the project) after the version associated with the project, the project version is not published anymore and therefore set as **Previously published** in the project overview.
When you open an item and have a project active, Episerver CMS displays the version associated with the active project. If you open an item and do not have a project active, Episerver displays the version that is set as primary. You can see which version is the primary in the versions gadget; the **primary version** is marked with a target symbol 🍀. The primary draft is not necessarily the latest version. For information on primary drafts when not working with projects, see Setting the primary draft.

When the projects feature is enabled, versioning works in the following ways:

<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. Because 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>
<tr>
<td></td>
<td>Yes: 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></td>
<td>No, the content is a published version or a draft not associated with the active project: 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>
Project 'X' is selected

- Prerequisites: Project mode is enabled, a project is active
- Is content a draft and part of current project?
  - Yes
    - Existing content is updated
  - No
    - Is there another version of the content in project?
      - Yes
        - Is that version in another language?
          - Yes
            - Remove old version from project
          - No
            - Create new draft
      - No
        - Content is saved and part of current project

None (use primary drafts) is selected

- and you create new content from scratch:
  - The draft is created and set as primary draft.

- and you update existing content:
  - Is the content a draft? **Note:** It does not matter if the content is associated with a project or not; versioning works the same in this case.
    - **Yes:** The draft is updated and saved. If it was associated with a project before you edited the draft, it will still be associated with the project afterwards. Whichever version was the primary draft before is still the primary draft.
    - **No, the content is not a draft:** A new draft is created and is not associated with a project. It is set as the primary draft. **Note:** If the updated content is a media file and auto publish is turned on, the media is automatically published at this stage.

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**CMS**

**Working with projects**

**Creating a project and adding content**

You create a new project from the context menu on the project bar.

![Project context menu](image)

When you create the project, it is automatically set as the active project, which means that editing changes (such as 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.

![Notification](image)

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 still can 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.

![Draft creation](image)

If you want to make a change that should not be associated with the active project, you 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 *preview*, you preview the active project; to preview another project, change the project in the project bar. Previewing a project shows you either the draft associated with the project or, if there is no draft associated with the project, the published version.

**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 project items**

From the project overview, you can publish multiple items that are set to status *Ready to Publish*. You can set items 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. Note that you publish the content items associated with the project, not the project itself.
Last changed by you, 1 minute ago.

Publish Changes

Last published by Installer, Today 12:56 PM
View on website

Schedule for Publish

Ready to Publish

Revert to Published

PM, by you
Product

PM, by you
Standard Page

Alloy Plain

Alloy Track

Call to action

Campaigns

Mark as Ready to Publish

Edit

Remove from Project
When items are ready for publishing, you can publish them directly from **Options**, if you have publishing access rights, or **schedule the project to be published later**.

If the items in a project were scheduled for publishing and you add new items to the project, the new content is not scheduled for publishing automatically. You must specifically set the new content 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 is published.
Removing content and deleting projects

Removing content from 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.

Deleting projects

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

Examples of using the project functionality

Example: Publishing a customer event using projects

This example creates 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 are scheduled to publish 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.

![Image of project management interface]

3. Prepare a thank you-page.
4. Create a registration form using the built-in form functionality or the Episerver Forms add-on. 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 use 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 button.
   - 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 to be published.

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

You cannot edit scheduled versions of items that are part of a project. If you need to publish the start page before the scheduled version is published, you need to create a new draft and then publish that. 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**

This example creates 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 you 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. (Must be done by an administrator.)
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.
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**

Comments facilitate collaboration between editors of a project. You can add comments on a project or on specific project items or actions, 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 another user has tagged you, made a comment on one of your actions or replied to one of your comments, you are notified in the user interface. The bell icon in the toolbar displays the number of new notifications you have. Click the icon to display a list of notifications. From the notification list, you can go to the project overview to read the comment.

If you go to the project overview to read a comment, the project is automatically activated. If you do not want to continue working in the project, you have to deactivate it.
If your system is configured to use email notifications, you receive an email when someone else replies to one of your comments or replies, or if you have set a project item to Ready to Publish and someone else comments on this action. You also are 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.

   ![Comment Text Box]

   You need access rights to the item 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 receives an email notification and a notification in the user interface when logging in. You can tag any of the available users but the tagged user still needs access rights to the project item to see the actual comment.
4. Press **Enter** or click **Post**.
Repeating 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

You cannot delete comments or replies yet.
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

You can use reports for websites to locate broken links and expired pages, or to get an overview of simple addresses used on the website. Obtain reports from the Reports option in the Episerver CMS global menu.

![Link Status Report](image)

When you generate a report, 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. You can filter data by time and language, and pages included in the report results open in edit view when you click on a page link.

The following 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>Displays unpublished pages that have a change date within a specified time span.</td>
</tr>
<tr>
<td>Published pages</td>
<td>Displays pages that have a publish date within a specified time span.</td>
</tr>
</tbody>
</table>
### Report Description

<table>
<thead>
<tr>
<th>Report</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Changed pages</td>
<td>Displays pages that have a change date within a specified time span.</td>
</tr>
<tr>
<td>Expired pages</td>
<td>Displays pages with stop publish date within a specified time span.</td>
</tr>
<tr>
<td>Simple addresses</td>
<td>Displays pages with a simple address.</td>
</tr>
<tr>
<td>Link status</td>
<td>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; see Scheduled jobs in the CMS Administration User Guide.

### Commerce Reports in Commerce

You can use reports in Episerver Commerce to follow-up on sales performance, or to monitor inventory stock information for products. See Reporting in the Commerce user guide, if you have a website with Commerce installed.
Managing gadgets

A gadget is a small application or add-on 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. Developers can also 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).
- **Forms** is used to access forms (default in the assets pane if the Episerver Forms add-on is installed).
- **Forms Elements** displays the forms elements that can be used when creating a form (default in the assets pane if the Episerver Forms add-on is installed).
- **Project Items** is used to view items belonging to a project. You can multi-select and mark items as Ready to Publish from this gadget.
- **Sites** displays the page tree for the website.
- **Recent** displays items you have viewed during your current browser session.
- **Tasks** displays tasks to be done on the website. This gadget lets you filter items on status. You can, for example, see a list of all items set as Ready to Publish.
- **Recently changed** displays recently changed content on the website.
Versions is used to manage content versions. See also Working with 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-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,
Managing gadgets

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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 that lets you search through different types of website content. You can search for content pages, blocks, files, community objects and products, if Episerver Commerce is installed. The search results are 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 used by the different Episerver products when retrieving content. The search is provider-based, letting you 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 all content types: document files, pages and blocks.
- Event-driven indexing, meaning instant updating of the index and search results.
- Search results filtered on access rights.
- “Search-as-you-type,” enhancing the search experience.
- Supports basic boolean operators like AND, OR, NOT, +, - and *.

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 and assets panes, and in the link dialog. This option searches for content in the panes and related dialogs.

Searching in the CMS edit view is described in the Finding content topic.

Site visitors 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, search for the page by entering the ID in the search field.
- When searching for specific phrases, combine keywords using quotation marks. Example: “episerver search tips”.
- The search function is case-insensitive, so you can use both uppercase and lowercase letters. Example: New York and new york return the same result.
- To match part of a word, place an asterisk * at the end of the word. Example: word1*, word2 return content with the words word1, word123 and word2, but not word234.
- You can use the boolean operators AND and OR.
  - AND means I only want documents that contain both/all words. Example: episerver AND search returns documents with both words.
  - OR means I want documents that contain either word. Example: 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 you can customize in many ways. Often, filtering is applied to the results, which can be based on many factors, such as categorization of content.

Configuring search

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

Find  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); see the Episerver Find User Guide.
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