



Episerver CMS

Administrator User Guide





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Epicor CMS Administrator User Guide

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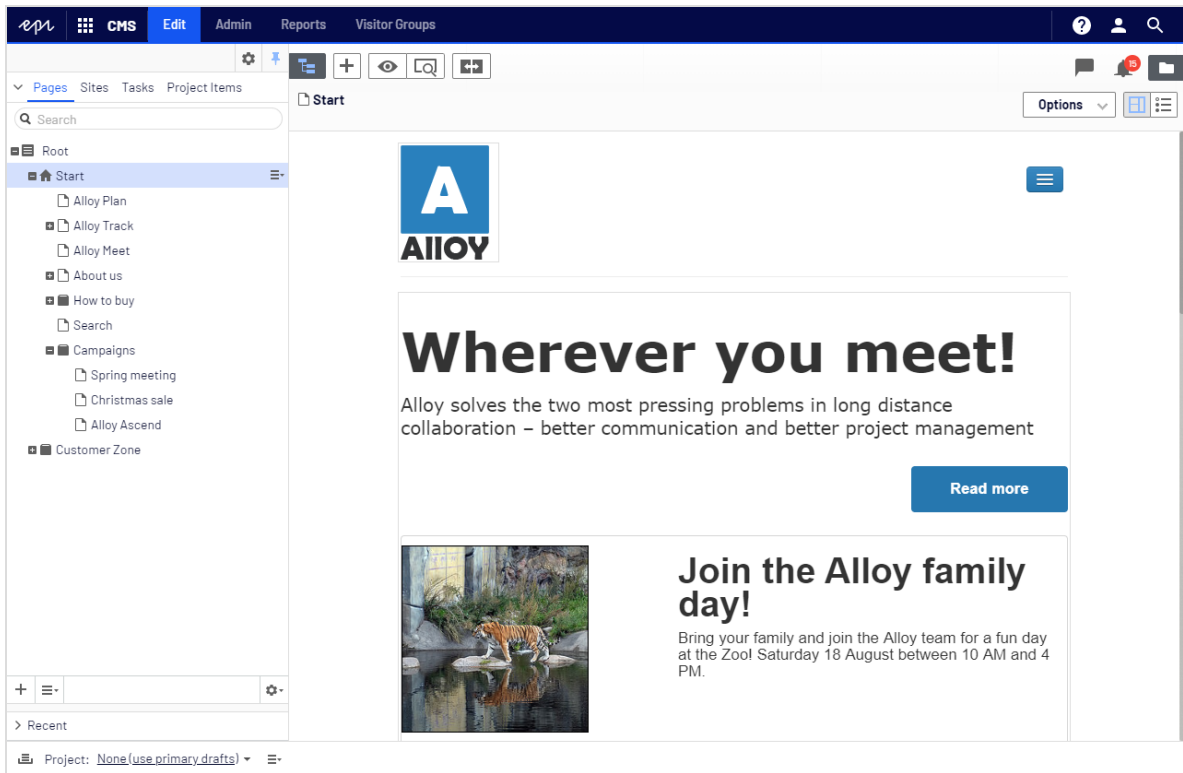
Introduction

Online help describes the features and functionality of the [Episerver Digital Experience platform](#) and covers CMS for content management, Commerce for e-commerce functionality, Campaign for omnichannel campaigns, Find for extended search, Insight for visitor profiles and customer segments, Perform and Reach for personalized product recommendations, and Episerver add-ons.

You access the online help from within the Episerver platform or from [Episerver World](#). The online help is also available in PDF format for users who prefer PDF or want to print the documentation.

This PDF describes the features and functionality of Episerver CMS, which you can find on [Episerver World](#). Developer guides and technical documentation also are found on [Episerver World](#).

The user guide is intended for editors, administrators, marketers and merchandisers, working with tasks as described in Roles and tasks.



Features, licenses and releases

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



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



Episerver Commerce adds complete e-commerce capabilities to the core functionality in CMS. It requires a specific installation and license.



Episerver Campaign lets you orchestrate omnichannel campaigns from a single screen, and send triggered emails based on real-time behavior. Campaign requires additional license activation.



Episerver Find adds advanced search functionality to websites. It requires a specific installation and license.



Episerver Insight is a user interface for viewing and filtering visitor profiles, and creating customer segments that can be used in omnichannel marketing campaigns. It requires a specific installation and license.



Product Recommendations lets you create and configure a merchandising campaign with personalized product recommendations from the personalization portal. It requires a specific installation and license.



Email Recommendations lets you include personalized product recommendations in any email, including cart abandonment and retargeting emails, from the personalization portal. You can also work with behavioral triggers to detect on-site behaviors and act upon them through automated, personalized emails. It requires a specific installation and license.



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.

Note: Due to frequent feature releases, this user guide may describe functionality that is not yet available on your website. See [What's new](#) to find out in which area and release a specific feature became available.

Images and screenshots

The Episerver user guide uses images and screenshots to visually guide you through the features of the Episerver platform. Due to different versions, continuous updates, and specific system permissions, images and screenshots may differ from the actual appearance.

Notes

Three types of notes are color marked throughout the user guide: tips, notes and warnings.



Tip: Green indicates tips that might show you an easier way to perform a task.



Note: Yellow indicates important information that may affect your work and should not be missed.



Warning: Red indicates warnings. If these warnings are ignored, serious errors or problems may occur.

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Roles and tasks

Episerver is designed for interaction with website visitors, and collaboration between users of the platform. In the following you find typical roles and related tasks used in scenarios in this documentation. See [Setting access rights in the CMS Administrator User Guide](#) to configure user groups and roles in Episerver.

Visitor and customer

A *visitor* is someone who visits a website to find information or to use services. If the website is an e-commerce site, the visitor can be a *customer* with purchasing intentions. Purchasing on an e-commerce website can be done "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 and moderator

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 by an editor, or a specific *moderator* role for large websites and online communities.

Recipient

A recipient is an individual who has opted-in to receive emails from a business, for example when purchasing from the website. Recipients and their associated data are managed in recipient lists, used for omnichannel marketing. Recipient actions such as clicking on links in an email, can be tracked and analyzed, providing input to website owners and users for further marketing actions.

Website owner

A *website owner* is someone with overall business and/or technical responsibility for the content and performance of one or more websites. May monitor 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 also have administrative access, and be the owner of mailing clients used for organizing campaign mailings.

User

A *user* is someone who logs in to the Episerver user interface to work with different parts of the platform. Can belong to one or more user groups and roles, depending on which parts of the Episerver platform they use, their tasks, and the size and setup of the organization.

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 to update or delete this content.

Marketer

A *marketer* creates omnichannel campaigns and content with targeted banner advertisements to ensure that customers get a consistent on-site experience. Furthermore, the marketer monitors campaign KPIs (key performance indicators) to optimize page conversion. A marketer with good knowledge of the website content may also optimize search for campaigns, and promote content using personalization features.

Merchandiser

A *merchandiser* typically works with stock on an e-commerce website to ensure that the strongest products are put in focus. This role may create landing pages, enrich product content, set product pricing, coordinate cross-product selling, oversee delivery and distribution of stock, and deal with suppliers. May want to identify search queries with unusually high or low conversion rates, to adjust the search. May also work with product promotion using personalization features.

Administrator

An *administrator* works with configuration of various system settings from the administration user interface, including search, languages, personalization, and user access. Administrators usually have extended access rights compared to other user groups, and can access all parts of the Episerver platform. They may also have administration access to integrated 3rd party systems. The administrator may also be the contact person for communication with the developers maintaining the website.

Developer

A *developer* is someone with source code access and programming skills. Developers work with website configuration, implementation, maintenance and development of new functionality. They create the rendering

templates for content and product catalogs, configure e-commerce settings, and manage indexing and customized search features. Developers may also install integrations and 3rd party extensions. Developers may be associated directly with the organization owning the website, or with an external partner company.



What's new?

This user guide describes functionality available in the latest release of a standard implementation of the Episerver platform software and services. New features are continuously made available, see [Episerver updates](#).

Note: Due to frequent feature releases, this user guide may describe functionality that is not yet available to you. Contact your system administrator for information about products and versions in your Episerver implementation.

This release of the Episerver User Guide describes features available in Episerver as of **November 28, 2019**, see release notes below for update history. See Archived documentation in the online version of the user guide for previously released user guides.

Release notes

Released	Area	Features and updates
November 28, 2019	Commerce	From the Orders tab of the Contact Details screen, you can view a customer's order history. (update 290) The Order and Cart Details screens were redesigned to more closely resemble Commerce Manager and make them easier to use. (update 291)
	Campaign	You can create coupon codes of type Code 128 bar code or Interleaved 2 of 5 bar code by using the coupon system.
November 6, 2019	Campaign	You can export event data (for example, clicks and opens) in real time via webhooks. (update 290)

Released	Area	Features and updates
October 24, 2019	Commerce	Support for updating order management and shipment statuses on the Order Management screen. (update 286)
October 17, 2019	Campaign	In lists that support multiple selection, the new Sort by selection button lets you sort selected items to the top of the list.
October 11, 2019	Commerce	On the Order Management screen, you can change a cart's Market , and an order's Market and Currency . (update 284)
	Marketing Automation connectors	Support for multiple instances of a connector, to use in separate regions. See Episerver Microsoft Dynamics CRM. (update 284)
October 4, 2019	Personalization	<p>The Personalization Portal is the user interface for accessing Product Recommendations and Email Recommendations features.</p> <p>The Personalization Mail recommendations can export and import email campaigns.</p>
September 25, 2019	Campaign	<p>The Performance Dashboard (Beta) now has the additional chart type Basic chart (mailing-based). Use the new hamburger menu within the widgets to export charts.</p> <p>In the Deliverability preview (Beta), the Spam suspicion tab displays the spam score and further information on the spam filters for individual clients. Notes on spam filters of each client have been added to the documentation.</p> <p>A step-by-step guide for Smart Campaigns has been added to split dispatch.</p> <p>A definition of the mailing types that can be</p>

Released	Area	Features and updates
		<p>selected in Deep Analytics reports and action-based target group filters has been added.</p> <p>Inline Editing lets you edit the texts of your mailing template directly in the mailing preview.</p>
September 5, 2019	CMS	<p>The CMS user interface has been rebranded. The screenshots have been updated to reflect this. (update 274)</p>
	Commerce	<p>Order meta-classes and fields appear on the Order Management screen.</p> <p>Several updates to the Order Management screen, including the ability to choose a market before selecting a cart, and the ability to create a new cart. (update 279)</p>
	Campaign	<p>Use the new Structured data tab in the General settings paragraph in the Template Kit to add structured data to your mailing. Add content in the Gmail Promotions tab section that Gmail should prominently display in the Gmail Promotions tab.</p>
	Marketing Automation	<p>New global settings for Marketing Automation connectors. Change to Microsoft Dynamics CRM connector configuration screen (Domain is out; Region is in), and Organization name can be the Unique name or the friendly name.</p>
August 21, 2019	Campaign	<p>The deliverability preview lets you check your mailing before dispatch, whether the contents are displayed correctly and whether your mailing has been classified as spam by the most popular email providers.</p>

Released	Area	Features and updates
		In the Performance Dashboard, you can display KPIs as a bubble chart. (update 278)
	Insight	Visitor groups was added to the filter types for viewing profiles.
August 7, 2019	Campaign	The IP warming topic provides information about how to build a good reputation with internet service providers as an email sender.
July 24, 2019	Campaign	<p>In the recipient history, you can view the third-party ID, the pseudonymized recipient ID. See Recipient history. (update 274)</p> <p>In the Basics section, you can find the new Deliverability basics section with information and best practices for successful deliverability.</p>
	Forms	The form element types Rich text and Submit button can now be dependent on other fields, which means they can be displayed or hidden depending on a visitor's previous input. See Dependencies tab in Form element types. (update 269)
July 10, 2019	Commerce	The Order Management screen lets you convert any cart to a purchase order and accept payments. See Order Management screen. (update 271)
	Campaign	If you are using Spryker as an e-commerce platform, you can integrate Episerver Campaign to connect e-commerce and mailing activities. See Spryker integration. Added menu entries Episerver Insight and Episerver Reach to Campaign start menu.

Released	Area	Features and updates
June 13, 2019	CMS	An administrator can require a review requester to add a comment when sending an item for review. See Managing approval sequences and Collaboration. (update 265)
	Campaign	The Episerver Campaign User Guide is a section in the Episerver User Guide.
	Marketing Automation connectors	Support for multiple instances of a connector, to use for example in separate regions. See Episerver Pardot and Episerver Marketo. (update 244)

Archived documentation

If your Episerver implementation is not on the latest version, you can access previous versions of the Episerver User Guide under Archived documentation in the online version of the user guide.



Getting started

This topic describes how to log in to an Episerver website, access features and navigate the different views. 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.

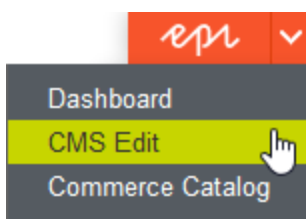
Logging in

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 box, 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 appears in the upper right corner.


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

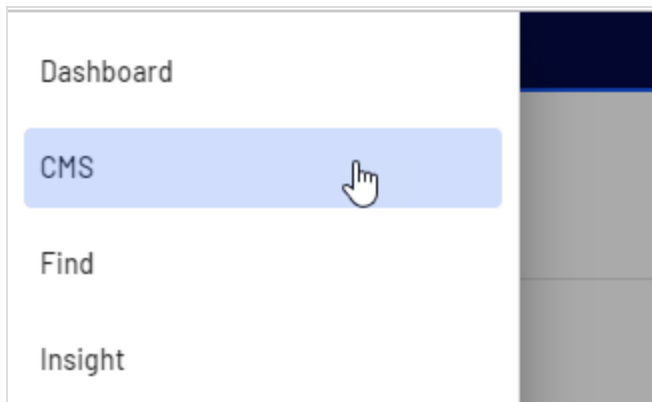


Navigation

Navigation within CMS and to other parts of the Episerver platform is done via the **top menu**.



The menu displays a product switcher  which opens a product selector area. From the product selector area, you can open products and systems integrated with your website. Select **CMS** (for example) to display available options in the submenu.



Note: 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

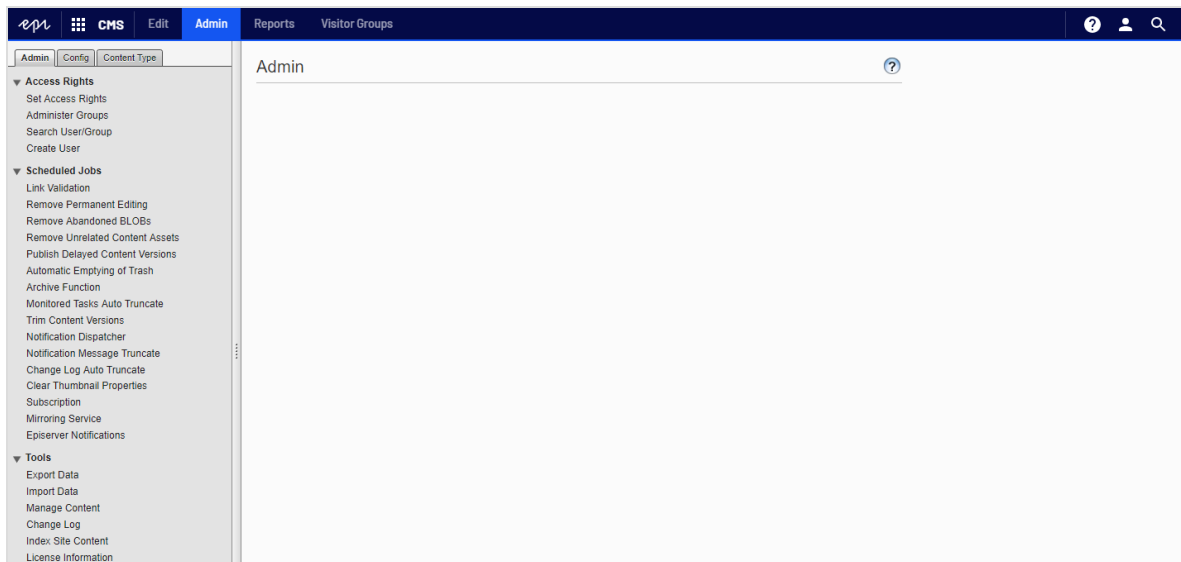
- The User interface and Roles and tasks topics describe the different parts of the user interface and the Episerver user roles.
- Creating content in the CMS Editor User Guide describes how to create content with images, blocks, links, and forms.
- Managing content in the CMS Editor User Guide describes how you can translate, preview, and compare content. It also describes how you can structure the website by moving, copying, and sorting pages and so on in the page tree.
- For publishing and collaboration, see Working with versions and Controlling the publishing process in the CMS Editor User Guide.
- Administration interface in the CMS Administrator User Guide to administer and configure settings in Episerver.
- If you have Episerver Commerce installed, see the Commerce User Guide to work with e-commerce tasks.
- If you have Episerver Find installed, see the Find User Guide to work with search optimization.



Administration interface

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

Administration view



The **Admin** view in CMS contains core administration features for the Episerver platform where you manage [access rights](#), website [languages](#), and [scheduled jobs](#). You also manage the [export and import](#) of data between websites, and [configure new websites](#) in a multi-site solution.

Visitor groups

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

More on administration



Administration in Episerver Commerce

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



Administration in Episerver Find

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



Access rights

By using access rights in Episerver CMS, you can control the content that a website visitor sees, and what editors can do and where they can do it in the content structure. For example, you may give members of the marketing department access to edit the website marketing material that other company users should not edit. You can set access rights for different types of content, such as pages, blocks, images and documents in the navigation and assets panes.

You can also use access rights together with visitor groups and give a visitor group from a local 10-mile radius access to an advertisement page.

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

Tip: You can watch the following demonstration video, [Managing access rights](#). (6:39 minutes)

Different types of access

You can grant or deny the following types of access to users and groups: Read, Create, Change, Delete, Publish, and Administer.

Access right	Description
Read	The user or group can access the content as a reader; otherwise the content is invisible.
Create	The user or group can create content under the content item on which this right is set.
Change	The user or group can access the content to modify it. Typically, Create and Change are set together but there may be cases where you want someone to modify created content (but not create their own content), or vice versa.
Delete	The user or group can delete the content.
Publish	The user or group can publish the content.

Access right	Description
Administer	<p>The user or group can create and edit approval sequences, and set access rights and language properties on individual content items from edit view for content given this access.</p> <p>Note: This does not provide access to admin view. To access admin view, you need to be a member of the WebAdmins group, see Built-in user groups).</p>

Access rights to assets

Just as for pages, access rights can be applied to assets, such as folders, blocks and media, in the content structure. You can define specific access rights from the "Root" level and all the way down, including the **Recycle bin** (Trash) and **For All Sites** that stores blocks and media. Blocks and media share the same folder structure.

Editors must have **Create** access rights to the global or site-specific folder under **For All Sites/For This Site** where they want to upload an image or create a block, or to the current page when adding assets to the local **For This Page** folder. If [media should be automatically published when they are uploaded](#), editors who upload must have **Publish** access rights, either to the global or site-specific folder or to the page, if media are uploaded to the local folder.

See Folders in the CMS Editor User Guide for a description of global, site-specific and local folders.

Note: Media are never automatically published if an approval sequence has been set on the folder to which the media are uploaded.

Set Access Rights for "Alloy Track targeted" ?

Restore access rights in EPiServer CMS for items that you have, for example, completely removed access to. You can change all rights on all items.

- Root
 - + Start
 - + Recycle Bin
 - For All Sites
 - + Alloy Plan
 - + Alloy Track
 - + Alloy Meet
 - Marketing
 - Campaigns
 - Alloy Track targeted
 - Alloy Track jumbotron
 - About Alloy Track
 - Download Alloy Track form
 - Installing editorial

 Add Users/Groups

	Read	Create	Change	Delete	Publish	Administer
 Administrators	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
 Everyone	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
 Site_Editors	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Inherit settings from parent item

Apply settings for all subitems

 Save

Should I set access rights for a single user or for a group?

You can set access rights to content for a single user. For example, you can set the access rights so only *Ann* (and system administrators) can edit the *Book a Demo* page. You can add *Ann* to any number of pages and content, and set *Ann*'s access rights to each content item the same (or differently) for each page.

If you have a number of users that need common access to content, managing access rights on a user-by-user basis can be complex. Create [user groups](#) that have similar access needs, add the users to each user group, and then use the user group to set access rights to content. This lets you manage access rights more easily. You can add a user to one or more groups.

For example, add users *Ann*, *Bob*, and *Cam* to a *Marketing user group* and give access rights to any number of pages and content to the Marketing group instead of each individual. To add *Dan* to all of the Marketing content, (or remove *Ann*), you modify the *Marketing user group*. You do not have to visit each page or content item to update each individual user's access rights.

Built-in user groups

A standard installation of Episerver has built-in user groups that align with user roles. You can extend pre-defined groups and roles; see [Managing users and user groups](#).

Note: When your website is set up during development, the membership and role providers available for your website need to be configured to use the built-in groups and roles in Episerver.

Group	Description
Administrators	Comes from Windows and is defined when the website is created. An administrator can access all parts of the system, and can edit all website content. Often, administrators are developers setting up or maintaining the website.
WebAdmins	<p>Comes with Episerver and can access both admin and edit views and the administration interfaces for add-ons and visitor groups. To use this group, you must add it through admin view > Admin tab > Access Rights > Administer Groups > Add > WebAdmins.</p> <p>Note: Membership in WebAdmins does not provide editing access in the content structure by default. In most cases, only a few system administrators or "super users" belong to this group.</p>
WebEditors	<p>Comes with Episerver and can access the editing view. To use this group, you must add it through admin view > Admin tab > Access Rights > Administer Groups > Add > WebEditors.</p> <p>Add users to this group who need access to the edit view. Then add the users to other groups to give them specific edit rights to content. On large websites, editors are often organized in groups according to content structure or languages.</p>

Group	Description
Everyone	Comes from Windows and provides "anonymous" visitors with read access to website content. All unregistered visitors to a public website are anonymous, meaning that they cannot be identified by the system. Removing access rights for the Everyone group, requires login to access content even if it is published.

Setting access rights

1. Go to admin view > **Admin** tab > **Access Rights** > **Set Access Rights**. The Set Access view appears with a content tree structure of the website.
2. Click on a node in the content tree (for example, *Marketing*). Typically, a content item shows **Administrators** (with all access rights) and **Everyone** (with Read only access rights). You can change these rights or add new users or groups.
 - If the users or groups are inactive (grayed out) for a content item, then the content item [inherits the access rights of its parent](#) content item. To set access rights for this content item, clear the **Inherit settings from parent item** check box.
 - To add settings to the selected node's subitems without affecting their existing settings, select the **Apply settings for all subitems**; see section [Setting access rights for all subitems](#) below.
3. Click **Add Users/Groups**. A dialog box appears.
4. Select the type you want: **Users**, **Groups**, or **Visitor Groups**.
5. Leave the *Name* field blank and click **Search** to display all items of the type you selected. You can also type one or more characters in the *Name* field to filter and display a subset of items. (You can also search for a user by **E-mail** address.)

The screenshot displays a user management interface with two main sections:

- Search Users/Groups:** This section contains a dropdown menu for 'Type' set to 'Users', and two text input fields for 'Name' and 'E-mail address'. A 'Search' button with a magnifying glass icon is located below these fields.
- Add Users/Groups:** This section features two list boxes. The 'Existing:' list on the left contains the names 'Bob' and 'Cam'. The 'Add:' list on the right contains the name 'Ann'. Between the two lists are two green arrow buttons: a right-pointing arrow above a left-pointing arrow, used for moving items between the lists.

At the bottom right of the interface, there are two buttons: 'OK' with a green checkmark icon and 'Cancel' with a blue 'X' icon.

6. Double-click a user or group in the *Existing* box to move it to the *Add* box and click **OK**.
7. Modify the access rights settings as you want them and click **OK**. The users or groups appear in the Set Access Rights view for the selected content tree item.

Set Access Rights for "Marketing" ?

Restore access rights in EPiServer CMS for items that you have, for example, completely removed access to. You can change all rights on all items.

- [-] Root
 - [-] Start
 - + Alloy Plan
 - + Alloy Track
 - + Alloy Meet
 - + About us
 - + How to buy
 - [-] Marketing
 - + Campaigns
 - + Customer programs
 - + Press releases
 - + Recycle Bin
 - + For All Sites

Add Users/Groups

	Read	Create	Change	Delete	Publish	Administer
Administrators	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Everyone	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Marketing Group	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Ann	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Inherit settings from parent item

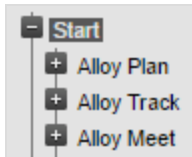
Apply settings for all subitems

Save

Note: If you set conflicting access rights to content, selected access rights prevail over cleared access rights. For example, Ann is a member of both the *Marketing* and *Support* user groups which each have different access rights set on the same content; *Marketing* has **Publish** rights, but *Support* does not. Ann, who is in both groups, has **Publish** rights to the content, but Bob, who is part of the *Support* group only, does not have **Publish** rights.

Setting inheritance for content subitems

Content inherits access rights from its closest parent item by default. When you set access rights for a content item, the rights apply to it and all subitems that have a selected **Inherit settings from parent item** option; subitems with this option cleared are not affected. For example, *Alloy Plan*, *Alloy Track*, and *Alloy Meet* all have the same access rights because they inherit the access rights from the *Start* page.



- If you break inheritance for *Alloy Meet* and change the access rights on it, the access rights become different from the parent (*Start*) and its two siblings (*Alloy Plan* and *Alloy Track*).
- If you then add a *Marketing group* group to *Start*, *Alloy Plan* and *Alloy Track* inherit the *Marketing group* (because inheritance is selected) but *Alloy Meet* does not because its inheritance is unselected.

The following image shows the access rights for the **Marketing** content; it will not inherit from the parent item and any changes of access rights on *Marketing* will not be pushed to subitems unless they have the **Inherit settings from parent item** option selected.

Set Access Rights for "Marketing" ?

Restore access rights in EPiServer CMS for items that you have, for example, completely removed access to. You can change all rights on all items.

- [-] Root
 - [-] Start
 - + Alloy Plan
 - + Alloy Track
 - + Alloy Meet
 - + About us
 - + How to buy
 - [-] **Marketing**
 - + Campaigns
 - + Customer programs
 - + Press releases
 - + Book a demo
 - + Recycle Bin
 - + For All Sites

Add Users/Groups

	Read	Create	Change	Delete	Publish	Administer
Administrators	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Everyone	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Marketing Group	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Ann	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Inherit settings from parent item
 Apply settings for all subitems

Save

Campaigns is a subitem of *Marketing*. It has **Inherit settings from parent item** selected, so the access rights are identical to that of the *Marketing* content item.

Set Access Rights for "Campaigns" ?

Restore access rights in EPiServer CMS for items that you have, for example, completely removed access to. You can change all rights on all items.

- [-] Root
 - [-] Start
 - + Alloy Plan
 - + Alloy Track
 - + Alloy Meet
 - + About us
 - + How to buy
 - [-] Marketing
 - [-] Campaigns**
 - + Customer programs
 - + Press releases
 - + Book a demo
 - + Recycle Bin
 - + For All Sites

Add Users/Groups

	Read	Create	Change	Delete	Publish	Administer
Administrators	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Everyone	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Marketing Group	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Ann	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Inherit settings from parent item

Apply settings for all subitems


Save




Book a demo is also a subitem of *Marketing*, but contrary to *Campaigns*, it has **Inherit settings from parent item** cleared, so its access rights are not the same as the *Marketing* parent content item. (*Ann* does not show up, and *Zach* is listed in the access rights.)

Set Access Rights for "Book a demo" ?

Restore access rights in EPiServer CMS for items that you have, for example, completely removed access to. You can change all rights on all items.


- [-] Root
 - [-] Start
 - + Alloy Plan
 - + Alloy Track
 - + Alloy Meet
 - + About us
 - + How to buy
 - [-] Marketing
 - + Campaigns
 - + Customer programs
 - + Press releases
 - [-] **Book a demo**
 - + Recycle Bin
 - + For All Sites

 Add Users/Groups

	Read	Create	Change	Delete	Publish	Administer
 Administrators	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
 Everyone	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
 Zach	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Inherit settings from parent item

Apply settings for all subitems

 Save

Setting access rights for all subitems

Selecting the **Apply settings for all subitems** check box applies the access rights of the parent item to all its subitems, even if a subitem has inheritance cleared. The option adds settings to a subitem that it did not have before and does not change or remove any existing settings on the subitem.

For example, the *Marketing* content item has *Ann* as a user with access rights.

Set Access Rights for "Marketing" ?

Restore access rights in EPiServer CMS for items that you have, for example, completely removed access to. You can change all rights on all items.

- [-] Root
 - [-] Start
 - [+] Alloy Plan
 - [+] Alloy Track
 - [+] Alloy Meet
 - [+] About us
 - [+] How to buy
 - [-] **Marketing**
 - [+] Campaigns
 - [+] Customer programs
 - [+] Press releases
 - [+] Book a demo
 - [+] Recycle Bin
 - [+] For All Sites

Add Users/Groups

	Read	Create	Change	Delete	Publish	Administer
Administrators	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Everyone	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Marketing Group	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Ann	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Inherit settings from parent item

Apply settings for all subitems

Save

When you select **Apply settings for all subitems**, *Ann* is added as a user with access rights to *Book a demo* because *Ann* is part of the *Marketing* content item's access rights. *Zach*, who already had access rights to *Book a demo*, remains on the list of access rights, unchanged.

Set Access Rights for "Book a demo" ?

Restore access rights in EPiServer CMS for items that you have, for example, completely removed access to. You can change all rights on all items.

- [-] Root
 - [-] Start
 - + Alloy Plan
 - + Alloy Track
 - + Alloy Meet
 - + About us
 - + How to buy
 - [-] Marketing
 - + Campaigns
 - + Customer programs
 - + Press releases
 - [-] **Book a demo**
 - + Recycle Bin
 - + For All Sites

Add Users/Groups

	Read	Create	Change	Delete	Publish	Administer
Administrators	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Ann	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Everyone	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Marketing Group	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Zach	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Inherit settings from parent item
 Apply settings for all subitems

Save

If a parent item and a non-inheriting subitem have the same user or group, and the access rights for the user or group differ between the parent and the subitem, the parent's settings are applied when you select **Apply Settings for all subitems**. For example:

- If the *Marketing* parent item has user *Ann* with only *Read* access set, and *Book a Demo* has user *Ann* with all access rights set, then **Apply Settings for all subitems** resets *Ann*'s access rights on *Book a Demo* to only *Read* access.
- Conversely, if *Marketing* has user *Ann* with all access rights, and the subitem has user *Ann* with only *Read* access, **Apply Settings for all subitems** gives user *Ann* all access rights on the subitem.

Removing a user or group from the access rights list

To remove a user or group from the access list, clear all of the access rights for that user or group and click **Save**.

Using a visitor group in an access rights list

Visitor groups are used by the personalization feature, and you need administration access rights to manage visitor groups. If you want an editor to manage visitor groups without providing access to the entire admin view, you can make the editor a member of **VisitorGroupAdmins**. This group provides access only to the **Visitor Groups** option in the top menu. **VisitorGroupAdmins** comes with Episerver but you must add it through admin view > **Admin** tab > **Access Rights** > **Administer Groups** > **Add** > **VisitorGroupAdmins**.

You can set specific access rights for visitor groups, letting them view specific "hidden" content that is not otherwise publicly available. For example, you may want only members of the *Visitors from London* visitor group to have access to a *Family day at the zoo* page with a discount coupon.

This feature is useful if you want to create a "customer area" for registered customers on your website. Being a member of a visitor group requires a registration and login to access the content.

1. Go to the admin view > **Admin** tab > **Access Rights** > **Set Access Rights**.
2. Select a node in the content tree.
3. Click **Add Users/Groups**.
4. In the Type drop-down list, select **Visitor groups** and click **Search** while leaving the **Name** field blank to view available visitor groups.
5. Double-click on a visitor group to move it to the **Add** box. Click **OK**.

Set Access Rights for "Family day at the zoo" ?

Restore access rights in EPiServer CMS for items that you have, for example, completely removed access to. You can change all rights on all items.

```

    Root
    - Start
      + Alloy Plan
      + Alloy Track
      + Alloy Meet
      + About us
      + How to buy
      - Marketing
        - Campaigns
          - Family day at the zoo
        + Customer programs
        + Press releases
        + Book a demo
      + Recycle Bin
      + For All Sites
  
```

Add Users/Groups

	Read	Create	Change	Delete	Publish	Administer
Visitors from London	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Administrators	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Everyone	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
WebAdmins	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Inherit settings from parent item

Apply settings for all subitems

Save

Note: Visitor groups can have **read** access only.

Access rights for languages

If your website has content in multiple languages, you can define access rights for languages so editors can create content only in languages to which they have access. Enabled languages are displayed in the **Sites** tab, but only users with access rights to a language can create and edit content in that language. See [Managing website languages](#).

Access rights for the Episerver platform

See Managing permissions for more information about how to manage access rights for other parts of the Episerver platform.



Managing users and user groups

For easier and safer maintenance, base [access rights](#) on **user groups** rather than individual users.

You can administer user credentials in the following ways:

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

Note: Users and groups created in the Episerver CMS admin view are available from admin view only; they are not accessible from Windows. You cannot add users created in Windows to groups created in Episerver. See the [technical documentation on Episerver World](#) for information about working with membership and role providers.

Smaller organizations with few editors tend to use the CMS administration view, whereas larger organizations with many editors tend to use the other options. You can combine these options.

Creating, editing and deleting users

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

1. From admin view > **Admin** tab > **Access Rights**, select **Create User**.
2. Specify a username, password and email address and set the account to **Active**.
3. Select none or more [user groups](#) to which the user should belong and click the arrow (or double click) to place the selected groups in the **Member of** box.
4. Under the **Display Options** tab, you can specify a default language for the user interface (optional) and touch support.
5. Click **Save**.

New User ?

User Information Display Options

Username

New password

Confirm password

E-mail address

Active
 Account locked (too many failed logon attempts)

Provider
Created date
Last login date
Description

Not member of

- Language_reviewers_French
- Language_reviews_German
- Product_editors
- WebAdmins

Member of

- Marketing
- WebEditors

Save

To **edit** user settings, search for the user under **Search User/Group** and then click a user name. You can modify properties only for users that are created via self-registration or via **Create User** in CMS.

To **delete** a user, search for the user under **Search User/Group**, click a user name to edit the settings, and click **Delete**. You cannot undo a deletion of a user.

Displaying members of a user group

Select the **Search User/Group** option to display groups and users.

- **Group view.** Click the desired group name to see members in the group.

The screenshot shows the 'Administer Groups' interface. At the top, there is a title 'Administer Groups' and a help icon. Below the title is a subtitle 'Delete or add groups used to assign access rights.' and a 'Cancel' button. The main content area contains two tables. The first table lists groups, with one entry: 'Marketing Group' (with a group icon) and 'SqlServerRoleProvider' as the provider. The second table, titled 'Users of group "Marketing Group"', lists three users: 'Ann', 'Bob', and 'Cam', all with 'SqlServerMembershipProvider' as their provider. Each user entry has a 'Delete' button with a red 'X' icon.

Group	Provider	Delete
Marketing Group	SqlServerRoleProvider	

1

Users of group "Marketing Group"

Name	Provider	Delete
Ann	SqlServerMembershipProvider	
Bob	SqlServerMembershipProvider	
Cam	SqlServerMembershipProvider	

1

- **User view.** Click on a user name to display the **Edit User** panel where you can modify group memberships and other user settings.

- To see all users or groups, leave the **Name** field blank.

Search Users/Groups ?

Type Users ▼

Name

E-mail address

Number of hits per page

Search

	Name	Provider	E-mail address	Description	Approved	Locked out
	Ann	SqlServerMembershipProvider	ann@example.com		✓	
	Bob	SqlServerMembershipProvider	bob@example.com		✓	
	Cam	SqlServerMembershipProvider	Cam@example.com		✓	
	Dan	SqlServerMembershipProvider	dan@example.com		✓	
	Ed	SqlServerMembershipProvider	ed@example.com		✓	
	Fran	SqlServerMembershipProvider	fran@example.com		✓	
	Gran	SqlServerMembershipProvider	gran@example.com		✓	
	Han	SqlServerMembershipProvider	han@example.com		✓	
	Ian	SqlServerMembershipProvider	ian@example.com		✓	
	Jan	SqlServerMembershipProvider	jan@example.com		✓	
	Ken	SqlServerMembershipProvider	ken@example.com		✓	
	Len	SqlServerMembershipProvider	len@example.com		✓	
	Mel	SqlServerMembershipProvider	mel@example.com		✓	
	Nan	SqlServerMembershipProvider	nan@example.com		✓	
	Ollie	SqlServerMembershipProvider	ollie@example.com		✓	
	Pam	SqlServerMembershipProvider	pam@example.com		✓	
	Quince	SqlServerMembershipProvider	quince@example.com		✓	
	Rob	SqlServerMembershipProvider	rob@example.com		✓	
	Stan	SqlServerMembershipProvider	Stan@example.com		✓	
	Tam	SqlServerMembershipProvider	Tam@example.com		✓	
	Una	SqlServerMembershipProvider	una@example.com		✓	
	Van	SqlServerMembershipProvider	van@example.com		✓	
	Will	SqlServerMembershipProvider	will@example.com		✓	
	Xavier	SqlServerMembershipProvider	xavier@example.com		✓	
	Yun	SqlServerMembershipProvider	yun@example.com		✓	
	Zach	SqlServerMembershipProvider	zach@example.com		✓	

1 2

- To see a subset of users or groups, type one or more letters in the **Name** field. Any names that have the string in them appear in the list.

Search Users/Groups ?

Type:

Name:

E-mail address:

Number of hits per page:

	Name	Provider	E-mail address	Description	Approved	Locked out
	Ann	SqlServerMembershipProvider	ann@example.com		✓	
	Cam	SqlServerMembershipProvider	Cam@example.com		✓	
	Dan	SqlServerMembershipProvider	dan@example.com		✓	
	Fran	SqlServerMembershipProvider	fran@example.com		✓	
	Gran	SqlServerMembershipProvider	gran@example.com		✓	
	Han	SqlServerMembershipProvider	han@example.com		✓	
	Ian	SqlServerMembershipProvider	ian@example.com		✓	
	Jan	SqlServerMembershipProvider	jan@example.com		✓	
	Nan	SqlServerMembershipProvider	nan@example.com		✓	
	Pam	SqlServerMembershipProvider	pam@example.com		✓	
	Stan	SqlServerMembershipProvider	Stan@example.com		✓	
	Tam	SqlServerMembershipProvider	Tam@example.com		✓	
	Una	SqlServerMembershipProvider	una@example.com		✓	
	Van	SqlServerMembershipProvider	van@example.com		✓	
	Xavier	SqlServerMembershipProvider	xavier@example.com		✓	
	Zach	SqlServerMembershipProvider	zach@example.com		✓	
	mame	WindowsMembershipProvider			✓	

1

Creating and deleting groups in CMS


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





- Click **Add** to create a user group, enter a name, and save your changes.
- Click **Delete** to delete a user group.

Warning: You can delete only user groups that were created from the CMS. You cannot recover a user group after you delete it.

Administer Groups ?

Delete or add groups used to assign access rights.

 Add

	Group	Provider	Delete
	WebAdmins	EPI_AspNetIdentityRoleProvider	
	WebEditors	EPI_AspNetIdentityRoleProvider	
1			

Note: You cannot change the name of an existing group. Instead, delete the group and add a new one.



Scheduled jobs

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

Administering scheduled jobs

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

The screenshot shows the 'Automatic Emptying of Trash' configuration page in the Episerver CMS Admin interface. The page is divided into two tabs: 'Settings' and 'History'. The 'Settings' tab is currently selected. The page contains a checkbox labeled 'Active' which is checked. Below this, there are two input fields: 'Scheduled job interval' with a value of '1' and a dropdown menu set to 'week', and 'Next scheduled date' with a value of '2017-12-14 00:30'. At the bottom right of the page, there are three buttons: 'Save', 'Start Manually', and 'Stop Job'. The left sidebar shows a navigation menu with 'Scheduled Jobs' expanded, listing various tasks including 'Automatic Emptying of Trash'.

The **History** tab lets you monitor the status and results when a scheduled job is executed. If a job fails, information about it appears under the **Message** column.

Settings		History		
Date	Duration	Status	Server	Message
1/6/2017 11:37:59 AM	<1s	Succeeded	epi-test	0 content items were deleted from recycle bin.



Built-in scheduled jobs

Archive Function

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

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

Automatic Emptying of Trash

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

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

Change Log Auto Truncate

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

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

Clear Thumbnail Properties

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

Fetch data from Marketing Connectors

The **Fetch data from Marketing Connectors** job improves the performance of the Marketing Automation connectors by fetching and caching databases and lists (wherever applicable). The result is faster load time for web pages with a form mapped to the connector, and also for the **Databases** drop-down list on the Database Mapping screen in the Episerver Forms user interface.

You can determine when to cache this data by configuring the **Fetch data from Marketing Connectors** scheduled job. To determine how long to cache the data, use the admin view > **Config** tab > **Global Settings** > **Connect For Marketing Automation Settings** > **Cache Duration in Minutes** field.

The job is enabled by default (if you have a Marketing Automation connector installed), and set to run every 60 minutes.

Link Validation

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

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

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

Marketing Test Monitor

The **Marketing Test Monitor** job handles the starting and stopping of A/B tests based on their start and end dates. If the **Automatically publish the winner** ... setting is enabled, the scheduled job also automatically publishes the winning variant when an A/B test completes, given that the calculated test result is statistically significant with the required confidence level. See [A/B Testing configuration](#) in [Tool settings](#).

The job is enabled by default (if you have the A/B Testing feature installed), and set to run every 30 minutes.

Mirroring Service

You can set the frequency of mirroring content between websites with the **Mirroring Service** job. If your website is set up to mirror content between websites, you can manually mirror content or automatically do so at specific intervals. See also: [Mirroring](#).

Monitored Tasks Auto Truncate

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

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

Notification Dispatcher

The **Notification Dispatcher** job is used to send out notifications, such as email notifications, from Episerver CMS to users at regular intervals.

It is used by the projects feature to send out email notifications of new or updated comments and replies posted in projects, and also by the content approvals feature to send out email notifications on review requests; see [Which actions trigger a notification?](#) for a list of the actions that will generate a notification.

Emails are only sent out if an action has triggered a notification since the job last executed.

The job is enabled by default, and set to run every 30 minutes.

Notification Message Truncate

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

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

Publish Delayed Content Versions

The **Publish Delayed Content Versions** job lets you define how often the system checks for content versions with a specific future publication date and time.

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

Remove Abandoned BLOBs

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

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

Remove Permanent Editing

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

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

Remove Unrelated Content Assets

You can delete content folders that contain media related to deleted content items with the **Remove Unrelated Content Assets** job.

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

Subscription

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

Trim Content Versions

The **Trim content versions** scheduled job checks the [Max number of versions](#) setting in [System settings](#), and removes redundant versions with status **Previously Published**.

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



Commerce-related scheduled jobs

Installing Episerver Commerce adds scheduled jobs to your implementation. See Scheduled jobs in the Commerce user guide.



Episerver Find-related scheduled jobs

See Administration and configuration in the Episerver Find user guide for information about scheduled jobs for Find.

Other scheduled jobs

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



Exporting and importing data

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

Exporting data

You can export the following: content items, content types, frames, dynamic property definitions, tabs, categories, files, and visitor groups.

Select a type of item to export, to display the available items of that type.

Export Data ?

Export data from one Episerver CMS to another.

Export content items

Select part of structure

- [-] Root
 - [-] Start
 - [-] Alloy Plan
 - [-] Alloy Track
 - [-] **Alloy Meet**
 - [-] About us
 - [-] How to buy
 - [-] Search
 - [-] Recycle Bin
 - [-] For All Sites
 - [-] Customer Zone

Include sub items

Export files that the pages link to

Automatically export dependent content types

Export content types

<input type="checkbox"/> ButtonBlock	<input type="checkbox"/> LandingPage	<input type="checkbox"/> EditorialBlock
<input type="checkbox"/> VideoFile	<input checked="" type="checkbox"/> NewsPage	<input type="checkbox"/> ContactBlock
<input type="checkbox"/> ImageFile	<input type="checkbox"/> ContactPage	<input type="checkbox"/> ContainerPage
<input type="checkbox"/> GenericMedia	<input type="checkbox"/> ArticlePage	<input type="checkbox"/> SysRoot
<input type="checkbox"/> StartPage	<input checked="" type="checkbox"/> TeaserBlock	<input type="checkbox"/> SysRecycleBin
<input checked="" type="checkbox"/> StandardPage	<input type="checkbox"/> SiteLogotypeBlock	<input type="checkbox"/> SysContentFolder
<input type="checkbox"/> SearchPage	<input type="checkbox"/> PageListBlock	<input type="checkbox"/> SysContentAssetFolder
<input type="checkbox"/> ProductPage	<input type="checkbox"/> JumbotronBlock	

Export frames

Export tabs

Export categories

Export property settings

Export visitor groups

Export
Test Run with Error Log

To export content items

1. Select **Export content items**, and then an item to export in the tree structure. If your content items contain multiple language versions, all language versions are included in the export package.
2. Optional: Select any of the three check boxes:
 - **Include sub items.** Exports the item's children as well.
 - **Export files that the pages link to.** Exports global assets (such as blocks and images and so on) that the selected item links to.

Note: Local assets (saved under **For this Page**) are included in the export.

- **Automatically export dependent content types.** This option is mostly used for older untyped pages, and specifies that the content type is included in the export. For newer, typed pages or if the import website already has this content type, it is not necessary to select this option.
3. Click **Export** to download the file package. Your export package is saved to your web browser's default download location.

Tip: To update a single content item through export and import: deselect **Include sub items** and export the item. Then import the item and make sure **Update existing content items with matching ID** is selected.

Importing data

With the **Import Data** function, you can retrieve information exported from the same or another Episerver website.

Import Data ?

Import data from another Episerver CMS.

Select an export file and upload Choose File No file chosen

Select content destination

- Root
 - Start
 - Alloy Plan
 - Alloy Track
 - Alloy Meet**
 - About us
 - How to buy
 - Search
 - Recycle Bin
 - For All Sites
 - Customer Zone

Update existing content items with matching ID

Select language All Deutsch français English

Begin Import Upload and Verify File

1. Select the file package to import. Files must end with **.episerverdata* for the import to work.
2. Click **Upload and Verify File** to verify the file content. The files are read and checked, and verification information appears.
3. Select the destination for the imported files.
4. Select or deselect **Update existing content items with matching ID:**
 - Select the check box if you want to keep the same GUIDs globally unique identifiers for imported items (such as pages, blocks and files) as they had on the exporting site. The import checks whether a GUID already exists and, if it does, that item is updated (if the imported item had a changed date that is later than the existing item). This means that content items with the same IDs are replaced instead of added.

If your exported pages contained links to global blocks and media, you must select **Export files that the pages link to** when exporting, for the linked global blocks and media to be updated during the import.
 - Deselect the check box if you want to import items with new IDs instead. If you import to the same website as you exported from, blocks and media are merged into folders with the same name in the assets pane.

Duplicated items get a number added to the item name. For example, exporting item *ABC* and importing it as a copy on the same website results in two items, namely *ABC* and *ABC2*. This also affects the URL, which in the case of the copied item would be *www.examplesite.com/abc2*.
5. If your export package contains multiple language versions, select **All** if you want to import all language versions or one specific language to import only that language version.
6. Click **Begin Import**.



Managing custom content types

The edit view in Episerver only displays the default content types, such as pages, blocks, media, and products. Your website may be set up with custom content types (that are implementing IContent) and these are not accessible via the navigation and assets panes in edit view. However, they are accessible from admin view > **Admin > Tools > Manage Content**.

Browse to the content item you want to change and select one of the options:

- **Edit content.** Opens the item in the edit view and you can edit it as any default content item.
- **Manage access rights.** Opens the Set access rights dialog box for the specific item. For details on access rights and how to change them, see [Access rights](#).
- **Delete.** Deletes the item. It is not possible to restore the item.
- **Move to trash.** Moves the item to trash. From trash, you can restore the item as long as the scheduled job, **Automatic Emptying of Trash**, has not run.

Manage Content ?

Manage content items within CMS

Select content item to manage

- Root
 - Start
 - Alloy Plan
 - Alloy Track
 - Alloy Meet
 - About us
 - How to buy
 - Search
 - Recycle Bin
 - For All Sites
 - Customer Zone

Edit content Manage access rights Delete Move to trash



Change Log

By default, all changes to pages, files and directories are logged in the **Change Log** system which is found in admin view > **Admin** tab > **Tools**. You can filter the information in the change log, making it easier to find relevant information.

Change Log ?

The change log displays all changes to pages, files and directories in the system and can be filtered by change date, category, action and changed by field.

Change date from ...

Change date to ...

Category

Action

Changed By

Maximum number of items per page

Start with sequence number

Include archived items

Read

Sequence Number	Change Date	Category	Action	Changed By	Data
-----------------	-------------	----------	--------	------------	------

← Previous
Next →

1. In the change log, view changed items by filtering on one or several of the following options:

Field name	Description
Change date from	Select a date and a time to view only items that were changed after this time.
Change date to	Select a date and a time to view only items that were changed before this time.
Category	<p>From the Category drop-down list, you can select an activity type:</p> <ul style="list-style-type: none"> • Content to display changed content items. This option displays items such as pages, blocks and media. • Message to display changed messages. (Messages are a type of activity in the projects feature.) • Project to display changes that are associated with a project. • Approval to display changes that are associated with a content approval sequence. <p>If you do not select an option from the drop-down list, you will see changes to all types of activities.</p> <p>Note: Website developers can configure which categories are available, so you may see other categories than the ones mentioned here.</p>
Action	<p>You can filter on actions, such as Delete, Publish and Rejected.</p> <p>Note: Website developers can configure which actions are available.</p>
Changed by	To filter for a specific user, enter the Episerver CMS user name.
Maximum number of items per page	Limits the displayed number of items on the page. Click the Previous and Next arrows to browse through the list of items.
Start with sequence number	Enter a specific sequence number to start listing the items in the change log. For example, if you have performed a previous filtering, you can use the sequence number from that occasion and repeat that filtering.

2. Click **Read** to run the query. A list of matching change log items appear.

To remove all change log items that are more than one month old and without dependencies, use the [Change log auto truncate scheduled job](#).

System settings

System settings in the admin view under **Config > System Configuration** let you define certain settings for the Episerver CMS installation, such as to activate globalization, change the error handling, and configure version management of content.

General tab

System Settings ?

WARNING! Incorrect changes on this page may cause your website to stop responding.

General
Editing

Error handling in Episerver CMS

Handler for subscription updates

Active for remote visitors

Episerver CMS default

Encrypt the connectionStrings.config file

Enable globalization

Detect language via browser's language preference

Disable deletion of content versions

Save
 Cancel

Setting	Description
Error handling in Episerver CMS	Select how you want errors to be handled; active for all visitors, remote visitors, or disabled.
Handler for subscription updates	The subscription function in Episerver lets visitors receive information about new and updated pages. Depending on whether multi-language is supported, you can select how the subscription dispatch is managed. This list can also include your own solutions for the subscription function.
Encrypt the con-	Select to encrypt the connectionStrings.config file, which contains sensitive

Setting	Description
nectionStrings.config file	information sent to and from the database.
Enable globalization	Select to activate management of content in multiple languages (globalization).
Detect language via browser's language preference	Select to activate languages to be shown based upon the visitor's browser settings.
Disable deletion of content versions	Select to disable the ability of editors to delete versions of pages, blocks and files. Selecting this also disables the automatic deletion of versions caused by the Maximum number of versions field on the Editing tab.

Editing tab

System Settings ?

WARNING! Incorrect changes on this page may cause your website to stop responding.

General **Editing**

Path to CSS file for the Editor

Maximum number of versions

Unlimited versions

Automatically publish media on upload

Setting	Description
Path to CSS file for the rich-text editor	Controls the styling options (such as heading levels and so on) available to the editor in the rich-text editor. This can be the same or similar CSS file as the site uses for styling content so that the editors get the same appearance as the site when editing content.

Setting	Description
Maximum number of versions	<p>Specify the number of previously-published versions of content items (for example, pages or blocks) that are stored. The currently-published version and draft versions are not counted.</p> <p>Default value is 20 versions. The scheduled job Trim content versions checks this setting and removes any Previously published versions above this number. Oldest versions are removed first.</p> <p>This field is ignored if the Unlimited versions or Disable deletion of content versions box is selected.</p>
Unlimited versions	<p>Stores an unlimited number of versions of content items (such as pages or blocks). This option may result in a large version list, which can be difficult to use unless you manually delete unwanted versions.</p> <p>If you check this, the value in the Maximum number of versions field is ignored.</p>
Auto publish media on upload	<p>Select to automatically publish and index media when uploaded to the website.</p> <p>Note: If a user uploads media but does not have publishing rights in the folder to which the media is uploaded, then the uploaded documents are not published (for example, images are not displayed when used in content). Ensure that editors who upload media also have the proper access rights set in the media folder structure.</p> <p>Also, if this check box is selected and an editor (with the proper access rights) uploads media, it is published and indexed immediately, so can be found by search engines, even if no published page contains links to the media.</p> <p>If the projects feature is enabled and the editor has a project selected when uploading media, this setting is ignored. The uploaded media is associated with the project instead, and must be manually published or published via scheduling.</p>



Managing websites

You can easily add and remove websites from an Episerver installation, perhaps to create short-lived campaign websites.

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

Manage Websites ?

Configured sites are listed below. Click the site to display the settings associated with the site.

This installation is licensed for 1000 sites.

+ Add Site

Websites

Name	URL
Default site	http://examplesite.com/
Campaign site	http://summercampaign.examplesite.com/

You can add new websites in the following ways:

- **Single-site setup** lets your installation have one CMS site mapped to one IIS instance. The IIS mapping is with a wildcard or a specific host name. You can have several single sites with separate databases and code base on the same server. In that case, you have a separate admin interface for each site.
- **Multi-site setup** lets you have a single CMS site as a base (default site), and can create new sites in admin view that share the same root page, database and code base. The additional sites are automatically mapped and require no additional configuration (if the base site is mapped to wildcard), or they need manual configuration of host name.

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

Requirements

The following requirements must be met to manage websites in admin view:

- **Available licenses.** A notification message informs you of the number of sites allowed by the license available for the installation. See **License Information** on the **Admin** tab for information.
- **Unique URL.** In admin view, each website must have a unique URL and start page in the content tree. Start pages cannot be nested.
- **Domain mapping must be configured in IIS.**
 - For multi-site setup, the IIS must be configured to respond to any host name.
 - For single-site setup, each separate CMS site must have an IIS site configured.

Adding and updating a website from admin view

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

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

Site setting	Description
Name	Type a name that identifies the website, such as <i>Example Site</i> .
URL	Enter the URL for the site, such as <i>https://examplesite.com</i> . If your CMS or Commerce site is using Unicode characters in the URL segments, internationalized domain names should be registered in Punycode format. See also: Internationalized Resource Identifiers (IRIs) on Episerver World.
Start page	Select the page to which the visitor is sent if only a host name is specified.
Use site-specific assets	Select this check box to ensure that assets, such as blocks and media, for this site are not available for use on other sites in the installation. This option affects the folder structure editors see in the assets pane.

Site setting	Description
Host name	<p>Optional. Enter a specific URL, such as <i>examplesite.com</i>. If you do not name the website, it is automatically named with the URL you have entered.</p> <p>One of the sites in the installation must be bound to the * host name. That site is used as a fallback when an exact match for the host name used by the visitor cannot be found. This setting is less important in a single-site scenario, because you can have only one site configuration. However, in a multi-site scenario, you must make sure that host bindings active in IIS are mirrored in the corresponding site configuration. For example, you want to add <i>examplesite.se</i>.</p> <p>Usage: The host name list is evaluated by the application in two different scenarios:</p> <ul style="list-style-type: none"> • Request routing. When serving a request, the application evaluates the host list to see which site and language (culture) that should be served. • Cross-site linking. When generating links to another site or culture, the host list is evaluated to find the host name to use for constructing the link URL. <p>Note: A wildcard * mapping must be accompanied by an explicit host name to support cross-site link generation.</p>
Culture	<p>Select the default language for when a visitor accesses the website using the host name.</p>
Type	<ul style="list-style-type: none"> • Primary host. A primary host is the preferred host name when generating links between sites or languages (cultures). If no host is defined as primary, the first non-redirected host and non-edit host is used. You can define only one primary host per language plus one primary that is unbound to any language. • Edit host. An editing host is the preferred host name to use when editing a site. This host name is used for all links between sites when the users are in the editing view. If no editing host is defined, the primary or first found host is used. You can define only one editing host per site and you cannot bind it to any language. Users are not forced to the edit host for editing and remain on their current host if the editing view is requested from another host on the site. • Redirection host. A redirection host defines that requests using this host name are redirected to a different host name. Such requests are redirected to the primary host or, if none is defined, the first non-redirected host

Site setting	Description
	found. You can set redirection to permanent or temporary, which determines the type of HTTP redirect status that should be used. Redirected host names are never used when generating links. There can be any number of redirection hosts defined as long as there is at least one primary or standard host name bound to the same language.
Scheme	Select the preferred scheme to be used for this host. This affects only the generation of links to the site as incoming requests are matched to the host name regardless of scheme.

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

The following example shows a default website with several host names, languages and redirection types configured:

Edit Website ?

Settings associated with the site.

This installation is licensed for 1000 sites.

Settings

General

Name:

URL:

Start page: ...

Use site-specific assets

Host Names

Host Name	Culture	Type	Scheme	
examplesite.com				
examplesite.se	sv	Primary		
www.examplesite.se	sv			
redirected.se	sv	Redirected (permanent)		
eamplesite.no	no			
redirected.no	no	Redirected (permanent)		
*		Redirected (temporary)		

Add

Delete Site
 Save
 Cancel

This example would lead to the following behavior:

- A request to <https://redirected.se> is redirected to <https://examplesite.se> using an HTTP 301 response.
- A request to <https://www.examplesite.se> is served the Swedish content.

Note: Canonical links added in the templates should point to <https://examplesite.se>

- A request to <https://redirected.no/page/> is redirected to <https://examplesite.no/page/> using an HTTP 301 response as this is the only Norwegian host that is not redirected.

- A request to <https://redirected.com> is redirected to <https://examplesite.com> using an HTTP 302 response as per the wildcard specification.

Example: Campaign website

The following example shows a campaign website:

Edit Website ?

Settings associated with the site.

Settings

General

Name

URL

Start page

Use site-specific assets

Host Names

Host Name	Culture	Type	
summercampaign.examplesite.com			<input type="button" value="Edit"/> <input type="button" value="Delete"/>



Managing website languages

Editors can create content in a particular language after you add and activate the language, and set an access level for a language. This prevents unauthorized editors from creating or editing pages in that language.

Note: When an editor copies a page, all language versions are copied regardless of the editor's language rights. This means that if an editor with access rights to English only, copies a page that exists in English and French and pastes that somewhere, both language versions are copied.

Language overview

Go to the **Config** tab > **System Configuration** > **Manage Website Languages**. The installed website languages appear. You can see which languages are enabled for active editing in edit view, and the order in which languages are available. You can adjust the order of the languages using the arrows to the left of the language. To change a language's settings, click its name.

Manage Website Languages ?

Define the languages that should be available to visitors on your website.

+ Add Language

Move Up	Move Down	Name	Language Code	Enabled	System Icon	Template Icon
	↓	English	en	✓		
↑	↓	English (United Kingdom)	en-GB			
↑	↓	English (New Zealand)	en-NZ			
↑	↓	English (South Africa)	en-ZA			
↑	↓	Deutsch	de	✓		
↑	↓	français	fr	✓		
↑	↓	español	es			
↑	↓	svenska	sv			
↑	↓	norsk	no			
↑	↓	dansk	da			
↑	↓	suomi	fi			
↑	↓	Nederlands	nl			
↑	↓	Nederlands (België)	nl-BE			
↑		português (Brasil)	pt-BR			

Adding and enabling languages

Before an editor can edit content in different languages, you need to add and enable the languages in the admin view and then enable them for editing in the CMS edit view.

I. Adding and editing languages

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

français - fr ?

Define a new website language that should be available to visitors on your website.

Name:

Enabled

Template icon:

Web address prefix:

Access level: Change
 Everyone

- e. In the **Template icon** field, enter the relative path to an icon that symbolizes the language. Several flags are zipped in `modules_protected\CMS.zip\App_Themes\Default\Images` folder. If you want to make your own icons, make them 15x15 pixels so they fit properly in the edit view.
- f. In the **Web address prefix** field, you can provide a specific prefix to show the content of the relevant language. If you do not provide a prefix, the language code is used, such as `www.company.com/nl`.
- g. Use **Access level** to define which editor groups have access to create and edit content in this language (see below). When you add a language, it is available for the **Everyone** group by default. Only users with access rights for a language have it available on the **Sites** tab, and can create and edit content in that language.

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

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

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

- h. Click **Save**.

2. Enabling a language on a website (if not already done)

- In the admin view, go to the **Config** tab > **System Configuration** > **Manage Website Languages**.
- Click on the desired language in the list.
- Select the **Enabled** check box and click **Save**.

The screenshot shows the configuration page for the language 'français - fr'. The page title is 'français - fr' with a help icon. Below the title, it says 'Define a new website language that should be available to visitors on your website.' The form contains the following fields and controls:

- Name:** A text input field containing 'français'.
- Enabled:** A checked checkbox.
- Template icon:** A text input field containing '~ /app_themes/default/images/flags/fr.gi'.
- Web address prefix:** An empty text input field.
- Access level:** A dropdown menu showing 'Everyone' with a 'Change' link and a checked checkbox.
- Add Users/Groups:** A button with a plus icon.

At the bottom right of the form, there are three buttons: 'Delete' (with a red X icon), 'Save' (with a floppy disk icon), and 'Cancel' (with a blue X icon).

3. Enabling a language for editing in CMS

This step makes the language available for content creation by editors. A language can be made available for the entire site structure, or for parts of it. By default, subpages inherit language settings from their parent page.

- In the CMS page tree, select the root page for the branch for which you want to enable the language. In this example, you want to make "French" available for the entire site, so the language setting is defined on the start page.
- Open the page in **All Properties** editing.
- Select **Tools** and **Language Settings** in the header.
- Under **Available Languages**, select **Change**.

- e. Select the language you wish to enable, click **Save**, and close the dialog box.

Language Settings

Language Settings for Page "Home"

Settings for Editors

Available Languages

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

English français svenska
 Deutsch

Save Cancel

Settings for Site Visitors

Fallback Languages

- f. For a correct display, the website start page also needs to be available in the new language. To do this, switch to the newly activated language, go to the start page, select **Translate**, then publish it.



Once the language is enabled as described above, it is available for content translation in the Episerver CMS Editor Guide.

Deleting an existing language

Remove a language from the website by opening the language for editing, and clearing the **Enabled** option.



Managing approval sequences

Approval sequences are used both for Content approvals, which is part of Episerver CMS, and the Change approvals add-on.

- Using **Content approvals** is a way to make sure that *content* is reviewed and approved before it is published. If content approvals have been defined for an item, the editor cannot publish it but has to set it as *Ready for Review*. For a description of content approvals from an editor's perspective, see Content approvals in the CMS Editor User Guide.
- **Change approvals** lets you make sure that certain *actions* that affect the website structure or content are reviewed and approved before they are applied. See Change approvals in the CMS Editor User Guide for more information on which actions that are affected.

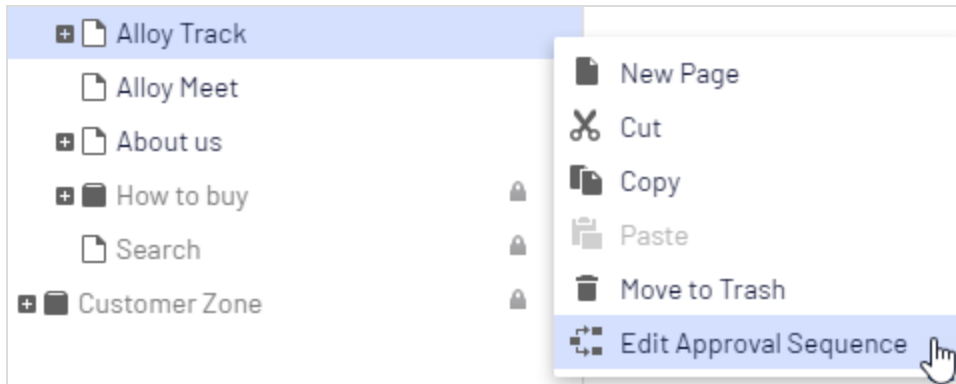
When an item or a change is in review, one or more appointed reviewers must approve it before the item can be published or the change is applied. The reviewers are defined by an administrator in **an approval sequence**.

How it works

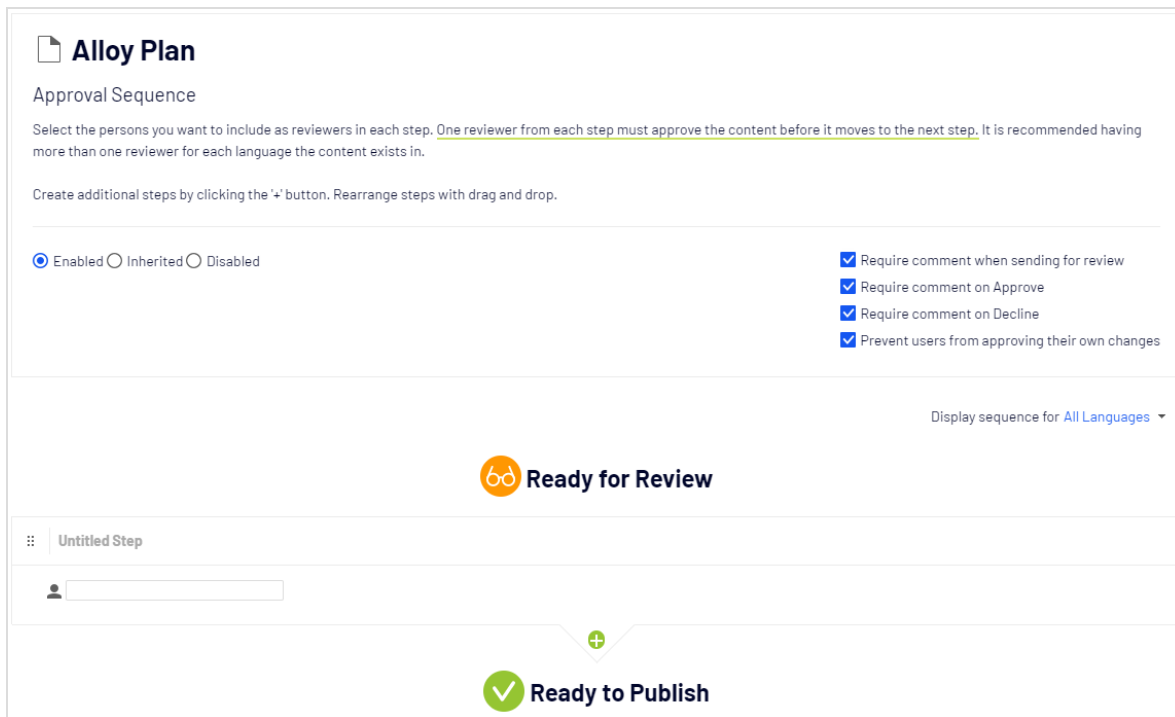
You define an approval sequence for a specific page in the page tree or for a global or site-specific assets folder in the assets pane. You can then choose to let the item's or folder's children inherit the approval sequence, create a new approval sequence for the children or disable approval sequences for the children. For detailed information how approval sequences work on assets, see [Approvals on assets](#).

Both individual users and user groups can be added. User groups and individual reviewers must have **Read** access right and at least one other access right to the content item to review and approve it. We recommend **Read** and **Create** because Create has the least capabilities since it prevents any actions on the content item itself, or **Read** and **Change** because Change alone cannot affect the visitor, unlike Delete and Publish. See [Access rights](#) and [Managing users and user groups](#).

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



In the approval sequence overview, you define the number of approval steps (you can have as many as you like), and also the persons responsible for review and approval in each of the steps.

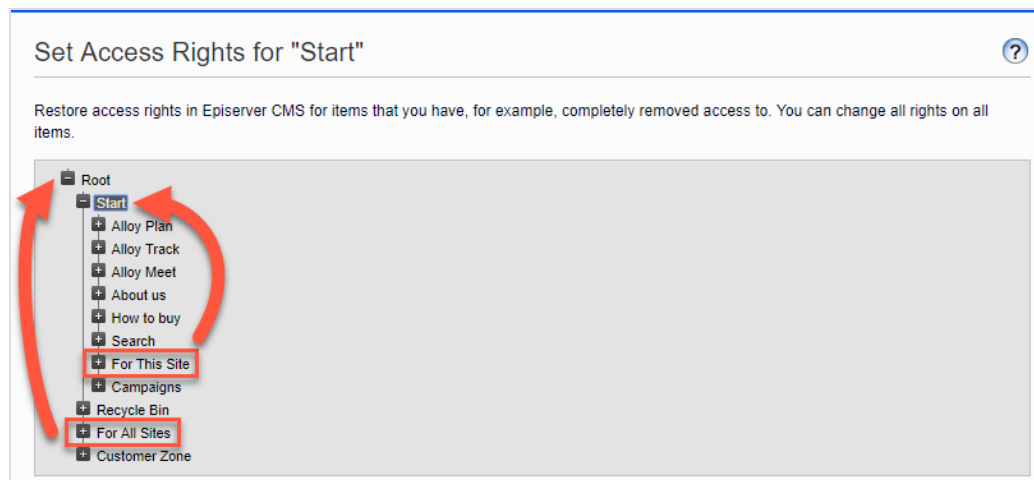


Content approvals on assets

Each page in Episerver can have its own 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 approval sequence is set on each assets folder, and all assets in the folder have the same approval sequence set. *Global* and *site-specific assets folders* can inherit their approval sequence from a parent folder (up to the site root), or you can define a unique sequence for it (or disable it

completely so that assets in the folder do not have to be approved). If there is no sequence set on a parent item, children inherit the disabled state.

Note: Blocks and media in global (For All Sites) and site-specific (For This Site) folders inherit the approval sequence from the parent node by default. The content inherits from the **site root**, which is not the same for global and site-specific folders. The global assets folders inherit from **Root**, while site-specific assets folders inherit from the site's root, that is **Start** in the example image below.



Local assets folders inherit their approval sequence from the page they are associated with. See Folders in the CMS Editor User Guide 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?

Note: The following description assumes you are using Content approvals but not Change approvals. If you are using Change approvals, all moving of folders and assets will trigger an approval sequence which must be approved before the folders or files are moved.

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 is 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 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 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.

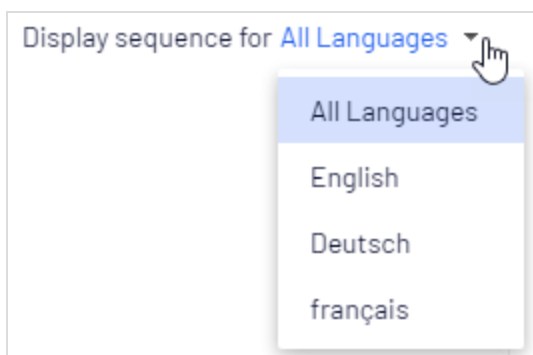
Note: Assets added to an assets folder with a approval sequence set are not auto published, even if the auto publish option is set (see [Auto publish media on upload](#)).

Content approvals on multi-language sites

If you are working with a multi-language site, you can define different reviewers for the different languages in each step. Each language must have at least one reviewer, but it is recommended to have at least two reviewers per language. This is especially important if you select the **Prevent users from approving their own changes** check box, since an item could otherwise get stuck in the review process if the review request is started by a user who is also the only reviewer.

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).

You can view how the approval sequence is defined for all languages or for each language individually by using the **Display sequence for [language]** drop-down list.



Setting up an approval sequence

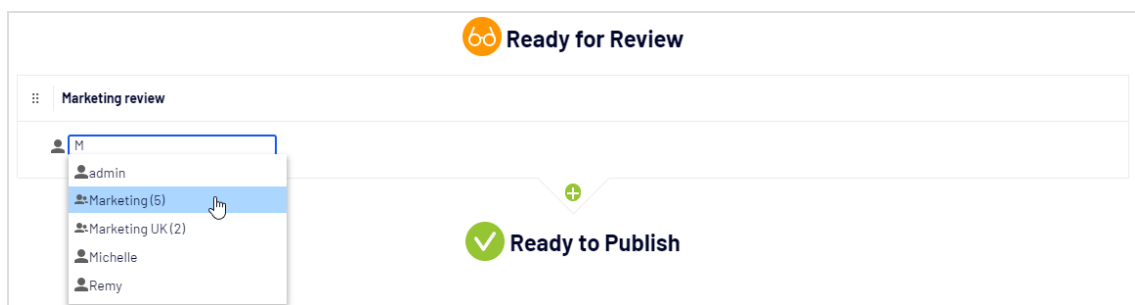
Setting up an approval sequence (single language website)

This section describes how to set up an approval sequence for one language. If your website uses multiple languages, see [Setting up an approval sequence on a multiple languages website](#).


1. Open the approval sequence overview from an item's context menu (in the navigation pane or assets pane).
2. In the first step, type the first letter of the reviewer's name. Select the reviewer from the list of suggestions. You can also add a user group. Groups have a special group icon in the list of suggestions and you can also see how many users are included in the user group.

Note: User groups and individual reviewers must have **Read** and at least one other [access right](#), such as **Create** or **Change** to the item to review and approve it.

It is recommended not to add large groups. Partly because users tend to think someone else will review if there are many responsible reviewers, and partly because many notifications will be sent out, which may annoy users. There is a setting in the *web.config* file which triggers a validation warning when you add a group with members exceeding this setting, and it also limits the amount of notifications sent to the users in the group. If it is set to 100, only 100 users will get email notifications even if the group contains 150 users. See [Configuring the CMS user interface](#) in the [CMS Developer Guide](#) on [Episerver World](#).



3. If you added an individual reviewer, add at least one more reviewer to the step. You should have at least two reviewers in each step, in case one of the reviewers is unable to review and approve.
4. Optional: Click **Untitled Step** to rename the step to something more descriptive, for example *Product marketing* or *ISO compliance review*.

5. Optional: To add more steps to the approval sequence, click the add button: . You can rearrange the steps by drag and drop.
6. Optional: To require a review requester to enter a comment on the review request, select the **Require comment when sending for review** check box.
7. Optional: To require a reviewer to enter a reason for approving or declining the content, select the **Require comment on Approve** or **Require comment on Decline** (or both).
8. Optional: Select **Prevent users from approving their own changes** if the user who sends a review request should not be allowed to approve the changes even if the review requester is one of the appointed reviewers.
9. Click **Save**.

Setting up an approval sequence for children items


When you have defined an approval sequence for an item, you can define if its children have to be approved or not.

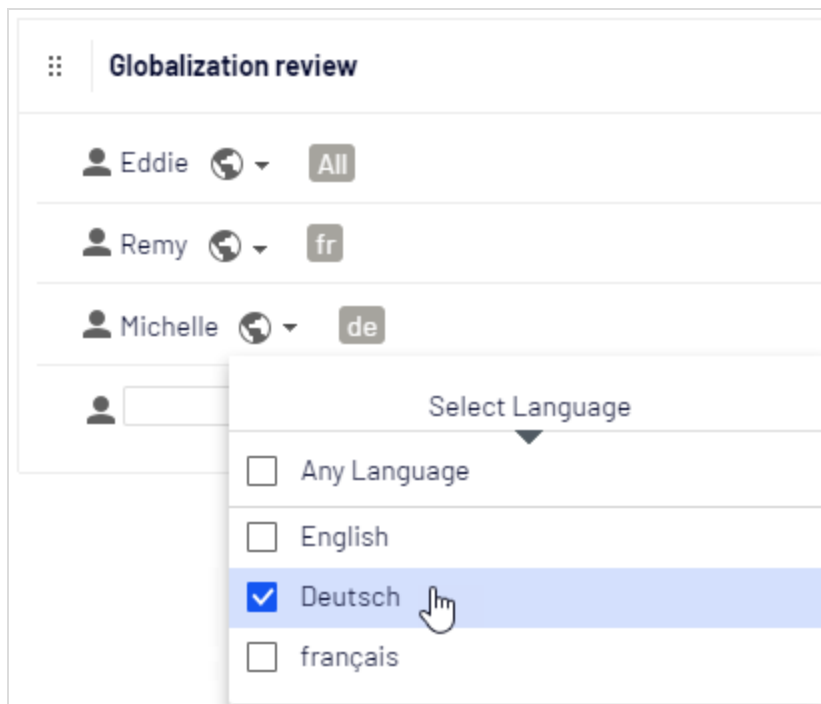
1. Open the approval sequence overview from a child item's context menu.
2. Depending on how you want to set up the item's approval sequence, select one of the three radio buttons:
 - **Enabled.** This setting lets you edit and define the approval sequence any way you want. The approval sequence is not connected to the parent item's approval sequence. Set up the sequence in the same manner as described in the section above.
 - **Inherited.** This setting locks the approval sequence for the current item and it gets whatever settings its parent has. If the parent item's approval sequence is changed, so is the approval sequence for the current item.
 - **Disabled.** This setting disables the approval sequence for the item and it does not have to be approved.

Note: **Inherited** is set by default, so if you do not define an approval sequence for an item's children, they automatically get the same approval sequence as the parent. If inheritance is set on children and the approval sequence is disabled on the parent item, the children inherits the disabled state. Local assets folders inherits the approval sequence set on the associated page or block.

Setting up an approval sequence on a multiple languages website


Note: The language setting only applies to Content approvals. Change approvals does not take this setting into consideration; all appointed reviewers can approve changes in all languages.

1. Open the approval sequence overview from an item's context menu.
2. In the first step, type the first letter of the reviewer's name. Select the reviewer from the list of suggestions. You can also add a user group. Groups have a special group icon in the list of suggestions and you can also see how many users are included in the user group.
3. Click the  icon and select the languages the reviewer or group of reviewers can approve in the **Select Language** drop-down list. A reviewer or group of reviewers can approve content in one, several, or all languages.



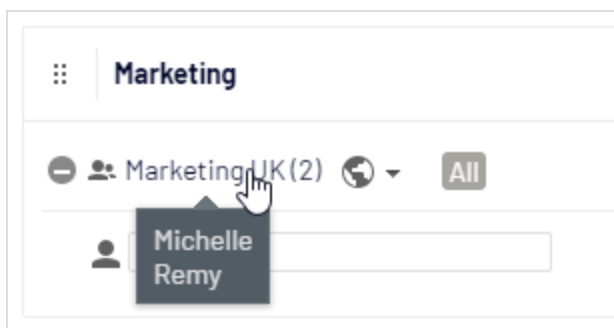
Note: There is a difference between selecting **Any language** and selecting all languages one by one. If you select Any language, the reviewer can approve an item in any language it exists in, which also includes any new languages you may add in the future. If you select all available languages one by one, these are the only languages the reviewer can approve content in. If you add a new language in the future, the reviewer does not have the rights to approve in that language.

4. If you added an individual reviewer, add at least one more reviewer to the step. You should have at least two reviewers per language in each step, in case one of the reviewers is unable (or not allowed as the review requester) to review and approve.
5. Optional: Click **Untitled Step** to rename the step to something more descriptive, for example *Product marketing* or *ISO compliance review*.

6. Optional: To add more steps to the approval sequence, click the add button: . You can rearrange the steps by drag and drop.
7. Optional: To require a review requester to enter a comment on the review request, select the **Require comment when sending for review** check box.
8. Optional: To require a reviewer to enter a reason for approving or declining the content, select the **Require comment on Approve** or **Require comment on Decline** (or both).
9. Optional: Select **Prevent users from approving their own changes** if the user who sends a review request should not be allowed to approve the changes even if the review requester is one of the appointed reviewers.
10. Click **Save**.

Editing an approval sequence

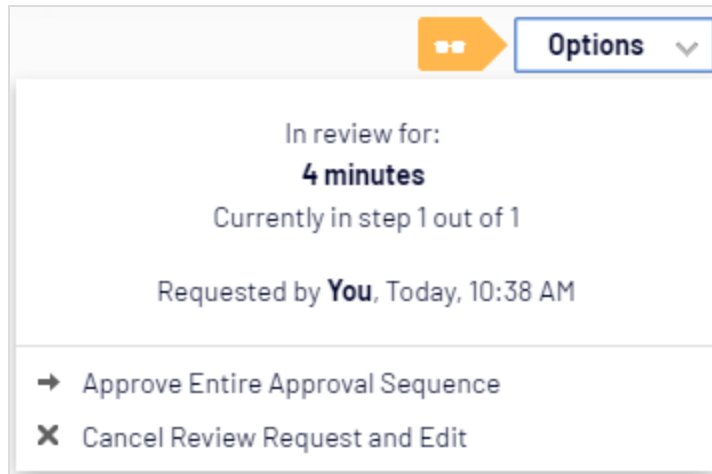
Open the approval sequence from the content item's context menu and make sure that the **Enabled** radio button is selected. Edit and save the approval sequence as described in [Setting up an approval sequence](#). You can rearrange the approval steps by drag and drop. Hover over a group name to see the users included in the group.



Note: If the selected content item has children that are set as **Inherited**, they will inherit all changes.

Approving and canceling approval sequences

As an administrator, you have the right to approve the entire approval sequence in one go, and to cancel a review request. You do that from the **Options** button. When you are approving an entire approval sequence, you are required to motivate why you are skipping the approval sequence and approving all steps. As administrator, you can always approve the entire approval sequence even if you sent the review request yourself and **Prevent users from approving their own changes** has been selected.



Deleting an approval sequence

You cannot delete an approval sequence but you can disable it. Open the approval sequence from the item's context menu and select **Disabled**. The item can now be published immediately and does not have to be approved. If the selected content item has children that are set as **Inherited**, these children do not have to be approved.

Commenting on content approvals

As an administrator, you decide whether review requesters have to add a comment on the review request, and if reviewers have to add a reason when they approve or decline content or not. An exception to this is when you approve an entire sequence, in which case you are always required to add a comment. For more information on commenting, see the Collaboration between editors topic in the CMS Editor User Guide.

The comments will be visible in the notification list in the user interface and in email notifications. Comments are also displayed in the project overview, if the content item in review is associated with a project.


All comments are stored in the database as part of the [change log](#) and can be used later on for auditing purposes without using projects.

Four-eyes principle

Certain businesses have the requirement that at least two persons must approve content or changes to a website before the content is published or changes applied. To achieve this, you need to set up an approval

sequence with at least two steps, and at least two reviewers in each step.

To avoid that one of the reviewers in a step happens to be the user who starts the review, and thereby can evade the four-eyes principle by approving their own changes, you also need to select **Prevent users from approving their own changes** in the approval sequence.

 **Alloy Meet**


Approval Sequence

Select the persons you want to include as reviewers in each step. One reviewer from each step must approve the content before it moves to the next step. It is recommended having more than one reviewer for each language the content exists in.

Create additional steps by clicking the '+' button. Rearrange steps with drag and drop.

Enabled
 Inherited
 Disabled
 Require comment when sending for review
 Require comment on Approve
 Require comment on Decline
 Prevent users from approving their own changes

Using notifications

Appointed reviewers can get notifications in the user interface (the bell icon  shows the number of new notifications) and by email. These notifications let the reviewers know that they have a review request waiting. The editor who started the review request is also notified when the reviewers approve or decline the request.

Which actions trigger a notification?

This table shows which actions generate notifications for the different roles in the content approval workflow.

Role	Receives notification when:
The user who sets the item to Ready for Review	<ul style="list-style-type: none"> a reviewer approves a review request. a reviewer declines a review request. an administrator force approves all steps in an approval sequence. the review request is canceled by an administrator.
Reviewer	<ul style="list-style-type: none"> an item is ready to be reviewed by the user. a review request is declined in the current (that is, the same step as the

Role	Receives notification when:
	user has been defined in) or in a later step of the approval sequence. <ul style="list-style-type: none"> • a review request is canceled in the current or a later step of the approval sequence.

User interface notifications

For the notifications in the user interface to be instantly displayed, your web server needs to have WebSocket support enabled. See [WebSocket support](#) on [Episerver World](#). If WebSocket support is not enabled, editors need to refresh the user interface to see the notifications.

Email notifications

For the email notifications to work, you need to configure your SMTP server with a *from* address. See [Configuring your email server](#) on [Episerver World](#).

A scheduled job, **Notification Dispatcher**, determines how often email notifications are sent out to users. The job gathers all notifications into one summary email which contains the user's all content approval notifications generated since the last email. The scheduled job is set to run every 30 minutes by default. See [Scheduled jobs](#) for more information on how to configure this scheduled job.

If you want emails to be sent out immediately, this can be configured by a developer through code, see [Configuring email notifications for content approvals](#) in the Episerver CMS Developer Guide on [Episerver World](#).



Creating categories

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

In Episerver CMS a category classifies content, such as for building filtering features for search and navigation. You create categories in admin view, and apply them to content in edit view.

Note: A category is a built-in property in Episerver CMS. You can apply categories to content, but you need to build the customized functionality for your website to display the resulting outcome, such as in a filtering. Also, do not confuse content categories with Commerce categories; see [Creating a catalog entry](#).

Adding a category

Add a new top-level category as follows:

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

Move Up	Move Down	Name	Display Name	Visible	Selectable	Add	Delete	Edit
	↓	Meet	Alloy Meet	☑	☑	+	×	✎
↑	↓	Plan	Alloy Plan	☑	☑	+	×	✎
↑		Track	Alloy Track	☑	☑	+	×	✎

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

6. Select **Selectable** if you want this category to be selectable in the **Select Categories** dialog box in edit view.
7. Use the up or down arrows if you want to move this category higher or lower in the list. This sequence determines the order in which categories appear in the **Select Categories** dialog box.
8. If you want to add a subcategory to a top-level, select the plus icon **+** under **Add**. Add the subcategory in the same way as the top-level category.

Deleting or changing a category

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



Editing frames and tabs

Frames

If you implemented frames on your website, you can use them for opening a link in a particular area of the window. This topic defines frames that are used by the system, and are accessible in the edit view as an option when an editor assigns a target frame for linking of content. Select the **Config** tab > **System Configuration** > **Edit Frames**.

Edit Frames ?

Define the frames your website is using. These will be available as "Target frame" options when creating links.

+ Add

Frame Name	Description	Edit	Delete
_blank	Open the link in a new window		
_top	Open the link in the whole window		

Tabs

You can make properties appear on different tabs by selecting the **Edit Tabs** function. You can add, edit and delete tabs. You can also define the display order for tabs, and apply access levels.

Edit Tabs ?

Define the tabs available under the Edit tab. When you create or edit a property, you can choose the tab under which you want to display the property.

+ Add

Name	Display Name	Sort Index	Requires Access Level	From code	Edit	Delete
Default	Default	2	Read	Yes		
Contact	Contact	1	Read	Yes		
Metadata	Metadata	3	Read	Yes		
SiteSettings	SiteSettings	6	Read	Yes		
<input type="text" value="Information"/>	<input type="text" value="Content"/>	<input type="text" value="10"/>	<input type="text" value="Read"/>			
Scheduling		20	Read	No		
Advanced		30	Change	No		
Shortcut		40	Read	No		
Categories		50	Read	No		
DynamicBlocks		60	Read	No		

Adding and editing a tab

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



Permissions for functions

Setting of access rights from Permissions for Functions

Set the access rights for the following functions, which are found in the admin view under **Config > Security > Permissions for functions**.

- **Detailed error messages for troubleshooting** provides selected groups or users access to detailed error messages whenever they encounter website failures.
- **Allow the user to act as a web service user** lets a user call one of the web services provided by Episerver. This function is used only for system integration purposes.
- **Allow users to move data/pages between page providers** lets selected users or groups move pages between page providers. This is used for websites with a custom page provider integrated with another system. Because data is deleted in the source provider, you may want to limit access to this function.

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

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

Deleting permissions to a function for a group or user

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

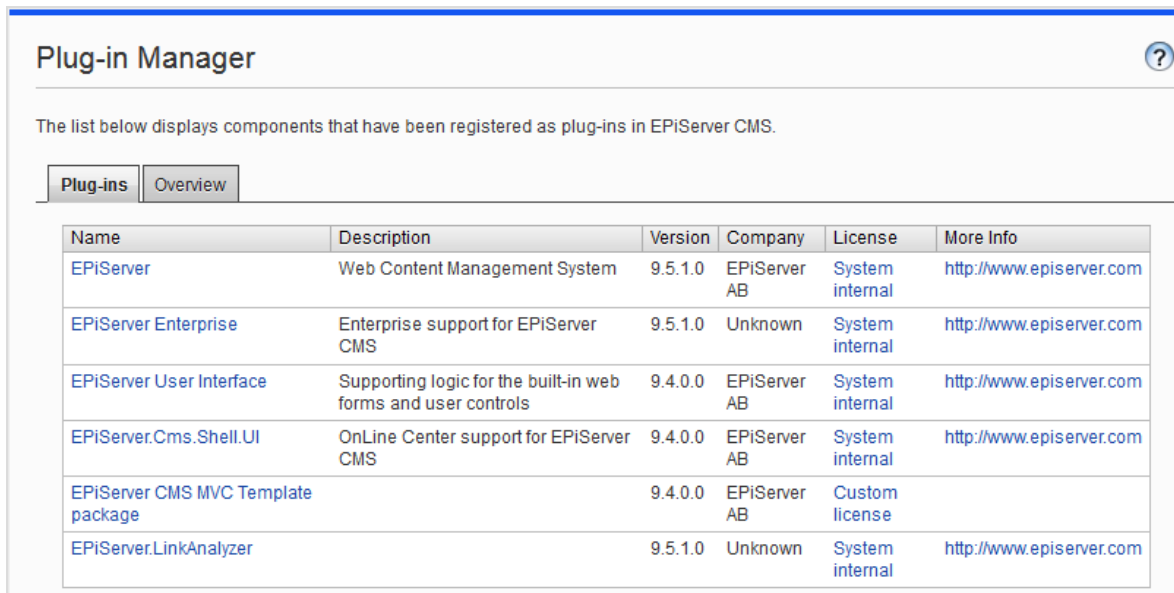
See also: [Access rights](#).

Tool settings

In admin view, under **Config > Tool Settings** you can perform miscellaneous functions for the integration and configuration of Episerver CMS.

Plug-in Manager

Many functions in Episerver CMS are created as plug-ins, which you can manage from the **Plug-in Manager**. You can activate and deactivate selected parts. If your organization invested in additional plug-ins, you can find them in the Plug-in Manager also. After choosing a plug-in, choose which parts of it are accessible in the **Overview** tab.

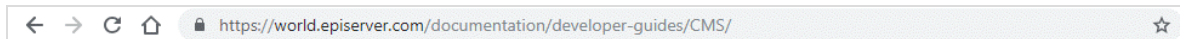


The screenshot shows the 'Plug-in Manager' interface. At the top, there is a title 'Plug-in Manager' and a help icon. Below the title, a message states: 'The list below displays components that have been registered as plug-ins in EPiServer CMS.' There are two tabs: 'Plug-ins' (selected) and 'Overview'. Below the tabs is a table with the following data:

Name	Description	Version	Company	License	More Info
EPiServer	Web Content Management System	9.5.1.0	EPiServer AB	System internal	http://www.episerver.com
EPiServer Enterprise	Enterprise support for EPiServer CMS	9.5.1.0	Unknown	System internal	http://www.episerver.com
EPiServer User Interface	Supporting logic for the built-in web forms and user controls	9.4.0.0	EPiServer AB	System internal	http://www.episerver.com
EPiServer.Cms.Shell.UI	OnLine Center support for EPiServer CMS	9.4.0.0	EPiServer AB	System internal	http://www.episerver.com
EPiServer CMS MVC Template package		9.4.0.0	EPiServer AB	Custom license	
EPiServer.LinkAnalyzer		9.5.1.0	Unknown	System internal	http://www.episerver.com

Rebuild name for web addresses

Rebuild Name for Web Addresses changes addresses in the address field. When a visitor views a page on a website based on Episerver CMS, a path to the page appears in the address field. The address reflects the page's place in the website structure.



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

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

Note: The **Rebuild Name for Web Addresses** function can affect links to the website. All internal links are updated automatically. However, if other websites link to a certain page, that link may be broken. The function can also affect visitors' browser favorites (bookmarks).

Creating a rebuilding name for web address

1. On the **Config** tab, select **Rebuild Name for Web Addresses**.

Replace Page Names in Web Addresses ?

Replaces the name of web addresses to build links that reflect the structure for the website.

Rebuild Links

Rebuild all page names in web addresses (overwriting existing links)

Status	Scanned pages	Fixed pages
Inactive	0	0

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

Mirroring

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

Mirroring jobs are executed at time intervals that you set, as described in [Scheduled jobs](#).

To enable mirroring, a mirroring application must be installed and running. The application handles data transfer between websites and is run separately to the Episerver CMS source and target sites. You can configure

source and target websites to use separate mirroring applications. You can also install and configure a single mirroring application. See [Episerver World](#) to configure and work with mirroring.

Mirroring Settings ?

Defines content that should be mirrored from EPiServer CMS to an external recipient.

Mirroring Settings
Messages
Monitoring

Name	<input type="text" value="NewMirroringChannel"/>
Parameters	<input type="text" value="EPiServer.MirroringService.MirroringTrans"/>
Use default URI	<input checked="" type="checkbox"/>
URI	<input type="text"/>
Start page	<input type="text" value="Customer Zone [48]"/> ...
Root page at destination	<input type="text" value="4"/>
	<input checked="" type="checkbox"/> Include the start page
Import as anonymous user	<input checked="" type="checkbox"/>
Import content as user	<input type="text"/>
Enable reporting	<input type="checkbox"/>
E-mail address	<input type="text"/>
Continue on error	<input checked="" type="checkbox"/>
Enabled	<input checked="" type="checkbox"/>
Enable validation	<input checked="" type="checkbox"/>

Delete
 Save
 Cancel
 Reset Channel
 Check System

Creating a channel

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

Go to the source site in admin view > **Config** tab > **Tool Settings** > **Mirroring** to create a channel for mirroring as follows:

1. Click **Create** and enter the following information:

Setting	Description
Name	Type an unique name for the mirroring channel.
Parameters	<p>Optional field that can be used by providers. In this version, there is one parameter which can be handled by the provider:</p> <pre>Episerver.MirroringService.MirroringTransferProtocol.WCF.MirroringTransferClient.TransferAction.</pre> <p>The TransferAction has two options None and ForceCurrentVersion. By default, the value is None, which creates a new version for each published page on the target site. The ForceCurrentVersion option does not create a new version for each published page. Instead, it updates the page on the target site.</p>
Use default URI	Select to use the URI defined in the configuration file (web.config) for the mirroring application. When you select this option, the URI field is disabled.
URI	<p>Enter the URI to the destination mirroring application's target service, for example:</p> <pre>http://localhost/Mirroring/Mirroring/MirroringTransferServer.svc.</pre> <p>The service for the default provider is:</p> <pre>MirroringTransferServer.svc.</pre>
Start page	Select the local root page on the source site to be mirrored.
Root page on destination	Select the page number on the target site where the pages are mirrored to.

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

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

Setting	Description
Reset Channel	Select to mirror everything again from the root page of the mirroring channel to the source site next time it is run. To reset the channel, select the name of the mirroring channel and click Continue with Reset .
Check System	To validate the created channel, click Check System . The result appears under the Messages tab. It checks both the source and target site to see if all necessary parameters are set up correctly; such as URI, Root page at destination, Mirroring Server binding, and Access to DataBase. See the section about synchronizing mirroring in the Developer Guide under <i>Deployment > Mirroring > Installing and Configuring mirroring</i> .
Messages	The result of a check system appears in the Messages tab. Click the arrow to view the result and other information regarding previous mirroring jobs that were run.
Monitoring	The status of a mirroring job appears in the Monitoring tab.
Target Site Configuration	To use a site as a mirroring target, some configuration is required.
Mirror Pages to a Target Site	Create a target page in the editorial interface on the target site and create a page that acts as the root page for the mirrored pages. You can also use an existing page as the mirroring root page. To publish pages, the mirroring application needs to be installed and configuration needs to be implemented.
Mirroring in Other Formats	Partners and customers can create mirroring in formats other than Episerver CMS Import/Export format and plug them in using the provider model.

Configuring A/B Testing

You can configure the settings used when running A/B tests in the admin view under **Config > Tool Settings > AB Testing Configuration**.

AB Testing Configuration

These settings are the defaults values used for when creating AB tests.

Test Duration:

Participation Percentage:

Automatically publish the winner of the test if the results are significant?

Confidence Level:

Setting	Description
Test Duration	Sets the default test duration in days. This can be changed in edit view when setting up an A/B test.
Participation Percentage	<p>Sets the default number of A/B test participants in percentage. This can be changed in edit view when setting up an A/B test.</p> <p>If the participation percentage is set to 20, 20 % of the site visitors participate in the A/B test. Half of the test participants are directed to the original version, and half to the variation version; the A/B test then measures which version has the most conversions. Site visitors not participating in the test are directed to the original version.</p> <p>A higher number means that more visitors participate in the test and data is gathered more quickly, but it also means that a possibly less-effective page, from a conversion point of view, is exposed to more visitors.</p>
Automatically publish the winner of the test if the results are significant?	<p>Set this to True and an A/B winner is automatically published when the A/B test completes and the results are statistically significant according to the set confidence level. The winner is the version that has the higher conversion rate. If the conversion rates are equal, the editor must pick a winner manually. This setting affects all A/B tests on the site.</p> <p>The default setting is False.</p>

Setting	Description
Confidence Level	<p>Sets the default confidence level of statistical significance you want from the A/B test results. This can be changed in edit view when setting up an A/B test.</p> <p>The confidence level determines how likely it is that a winning page is in fact better. That is, that the difference between the winning page and the challenger are not due to coincidence. For example, a 95% confidence level means that 95 identical test cases out of 100 would end with the same result. In other words, the higher the number, the more reliable test result.</p>

Search configuration

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

Enabling search providers

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

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

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



Properties

Properties are central in Episerver CMS. Content type properties store and present data, such as page types and block types, and they are fields where editors enter information into a page type. A property can be the page name, an image placeholder, or the editor area, where you can add text. For example, the XHTML editor is a property of the type **XHTML String (>255)**, which results in an editorial area in the page type when used. For property content to be visible to visitors, link it to a [content type](#) with corresponding rendering.

Property types

You can define properties in code or from the admin view. For certain properties defined in code, you can create "non-breaking" changes in admin view to override these settings. If a property is defined in code and cannot be changed in admin view, information appears. If you make changes to a property defined in code, you can reset the changes to the values defined in code.

The following types of properties are used:

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

You can locate property settings under the **Config** tab in the **Property Configuration** section, and under the **Content Type** tab when you work with content types.

Editing and adding properties on content types

You normally define properties in code but occasionally add them in admin view, because properties added from there are not rendered.

When you edit and add properties, the following tabs are available:

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

Editing a property

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

See [Adding a Property](#) below for information about available settings for properties.

Edit Property ?

Common Settings

Custom Settings

General

From code	Yes
Type	XHTML string (>255)
Name	MainBody
Presentation control	<input style="width: 100%;" type="text" value="Use configuration settings"/>
Default value	<input checked="" type="radio"/> No default value <input type="radio"/> Inherits value <input type="radio"/> <input style="width: 100%;" type="text"/>
	<input type="checkbox"/> Value must be entered
	<input checked="" type="checkbox"/> Searchable property
	<input checked="" type="checkbox"/> Unique value per language

User Interface

	<input checked="" type="checkbox"/> Display in edit view
Field name	<input type="text" value="MainBody"/>
Help text	<input type="text"/>
Tab	<input style="width: 100%;" type="text" value="Content"/>
Sort index	<input type="text" value="310"/>

Adding a property

1. In admin view, from the **Content Type** tab, select a page type and click **Add Property**.
2. Fill in the fields.

Field	Description
Type	Select a property type. You can choose from several property types: integer, string, page, date, and so on. You can also create a property type.
Name	Name the property. This is used when programming and making language settings.
Presentation control	Use of multiple editors is supported but the TinyMCE editor is used most often, and the Presentation control drop-down list appears dimmed. If your website is configured to allow multiple editors and you chose the property type XHTML String (>255) , the Presentation control drop-down list is enabled, and you can select the XHTML editor to use.
Default value	Select a value for the property. This is the default value on all pages where it is used. You can specify a default value for both customized and built-in properties.
Value must be entered	Select the check box to make it mandatory to enter a value for the property before saving. The setting is configured per property and content type.
Searchable property	Clear the check box to exclude a property from search. It might be beneficial to avoid undesired property values the search index. By default, all properties are searchable.
Unique value per language	Select whether the property is unique for a certain language. This is needed only if the website supports globalization.
Display in edit view	Determine if the property is visible in edit view. By default, all properties are visible in the editorial interface. The setting is configured per property and page type.
Field name	Specify a heading for the property. This text appears for the editor when editing the page in All Properties editing view unless a translation of it was added language resources.

Field	Description
Help text	Specify a help text to help the editor understand how to use this property, and appears in All Properties editing view when hovering over the property name.
Tab	Select the tab on which the property is to be displayed in the Tab drop-down list.
Sort index	Select a relative number to sort this property among other properties.

3. Click **Save**.

The **Custom Settings** tab displays custom information for the selected property type.

Defining language-specific properties

When working with globalization, you define in every template which fields vary depending upon the language. To do this, set the property for that field to "locked" or "open" for globalization using the **Unique value per language** setting in admin view.

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

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

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

Setting a property to be language-specific

1. On the **Content Type** tab, select the page type that contains the property to be set.

Edit Property ?

Common Settings Custom Settings

General

From code: Yes

Type: XHTML string (>255)

Name: MainBody

Presentation control: Use configuration settings ▼

Default value:

- No default value
- Inherits value
-
- Value must be entered
- Searchable property
- Unique value per language

User Interface

Display in edit view

Field name: MainBody

Help text:

Tab: Content ▼

Sort index: 310

Save Revert to Default Cancel

2. Click the name of the property that you want to change.
3. Select the **Unique value per language** option.
4. Save your changes.

Organizing properties in content

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

Changing the order of properties

Follow these steps to change the order in which properties appear in the All Properties editing view. For example, you can display important properties at the top of the page.

1. Select the page or block type on the **Page Type** or **Block Type** tab.

[AlloyTech] Standard page ?

The standard page is the most commonly used page on the web site, it can be used as well for ordinary pages as for news and events.

Information

From code	Yes
Name	StandardPage
Display name	[AlloyTech] Standard page

[Settings](#)

[+ Add Property](#)

	Name	Field name	Type	Required	Localized	Searchable	Tab	From code
	↓ MainText	Heading and text	Block (TextBlock)				Content	Yes
↑ ↓	SecondaryBody	Secondary body	XHTML string (> 255)		Yes	Yes	Content	Yes
↑ ↓	MainListRoot	Fetch main listing from	Page				Content	Yes
↑ ↓	MainListCount	Display number of pages in the main list	Integer				Content	Yes
↑ ↓	SecondaryListRoot	Fetch secondary listing from	Page				Content	Yes
↑ ↓	SecondaryListCount	Display number of pages in the secondary list	Integer				Content	Yes
↑ ↓	EPSUBSCRIBE	Activate subscription	Selected/not selected				Content	
↑ ↓	EPSUBSCRIBE-EXCLUDE	Block subscription for this page	Selected/not selected				Content	
↑ ↓	SEOTitle	Page title	String (<= 255)		Yes	Yes	SEO	Yes
↑ ↓	SEODescription	Page description	String (<= 255)		Yes	Yes	SEO	Yes
↑	SEORobots	Search robots	Drop-down list		Yes	Yes	SEO	Yes

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

Placing a property on a tab

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

Configuring customized property settings

On the **Config** tab under **Property Configuration > Edit Custom Property Types**, you can configure custom property types.

Priorities and configuration

The property settings have the following priority:

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

You can create a property, name it, and give it a data type and other settings.

Creating custom property types

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

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

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

Data type name	Base type	Description
Boolean	Selected/not selected	True or false.
Number	Integer	An integer.
FloatNumber	Floating point number	Number with decimals, for example, 3.14.
PageType	Page Type	Episerver CMS page type defined in admin

Data type name	Base type	Description
		view.
PageReference	Page	Link to an Episerver page in the current site.
Date	Date/Time	Date and time.
String	String (<=255)	Short text, fewer than 256 characters in length.
LongString	Long String (>255)	Used for text that can exceed 255 characters in length, for example the main editor area in edit view.
Category	Category selection	List of categories.
LinkCollection	Link collection	A collection of links that can be added and edited in edit view.

Note: Default values for properties are not defined in code.



Content types

Content in Episerver can be page and block types, folders, or media files such as images and documents. Content can also be products in a product catalog in Episerver Commerce.

Content types and properties

Page and block types contain the [properties](#) where editors enter information, such as a link to an image on a web page.

[AlloyTech] Standard page ?

The standard page is the most commonly used page on the web site, it can be used as well for ordinary pages as for news and events.

Information

From code	Yes
Name	StandardPage
Display name	[AlloyTech] Standard page

[Settings](#)

+ Add Property

	Name	Field name	Type	Required	Localized	Searchable	Tab	From code
	↓ MainText	Heading and text	Block (TextBlock)				Content	Yes
↑ ↓	SecondaryBody	Secondary body	XHTML string (>255)		Yes	Yes	Content	Yes
↑ ↓	MainListRoot	Fetch main listing from	Page				Content	Yes
↑ ↓	MainListCount	Display number of pages in the main list	Integer				Content	Yes
↑ ↓	SecondaryListRoot	Fetch secondary listing from	Page				Content	Yes
↑ ↓	SecondaryListCount	Display number of pages in the secondary list	Integer				Content	Yes
↑ ↓	EPSUBSCRIBE	Activate subscription	Selected/not selected				Content	
↑ ↓	EPSUBSCRIBE-EXCLUDE	Block subscription for this page	Selected/not selected				Content	
↑ ↓	SEOTitle	Page title	String (<= 255)		Yes	Yes	SEO	Yes
↑ ↓	SEODescription	Page description	String (<= 255)		Yes	Yes	SEO	Yes
↑	SEORobots	Search robots	Drop-down list		Yes	Yes	SEO	Yes

For a content type, you define a set of properties that can hold information, such as a link to an image, a web page, or editorial text. A typical website has a set of content types that match the identified functions needed on that website.

The content type is the foundation from which you create one or many page or block instances. To display content to visitors, the page or block type and its properties need to be mapped to corresponding rendering.

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

- You can define page types in code or from the admin view. However, you can define block types only in code.

- For page types defined in code and for all block types, you can define "non-breaking changes" of properties in admin view.
- You are notified if you cannot change the settings defined in code in admin view.
- If you make changes to a page type defined in code, you can reset the changes to the original values defined in code.

Page types

Warning: Changing page type settings may cause the website to stop working. Although you can create page types in admin view, you should create them from code.

Editing a page type

Edit "Standard Page" ?

Edit the basic information about the page type.

Information | Default Values | Available Page Types

General

From code	Yes
Name	StandardPage
Display name	<input type="text"/>
Description	<input type="text"/>
Sort index	<input type="text" value="0"/>

Available in edit view

Display Template

Web Form template path	<input checked="" type="radio"/> <input type="text"/>
Web Form template	<input type="radio"/> <input type="text" value=""/>
MVC template	<input type="radio"/> <input type="text" value=""/>

Advanced

Guid	9ccc8a41-5c8c-4be0-8e73-520ff3de8267
Class name	AlloyTemplates.Models.Pages.StandardPage, AlloyMvcTemplates, Version=9.4.0.0, Culture=neutral, PublicKeyToken=null

Access level

Create

Everyone

Add Users/Groups

To edit settings for an existing page type, open the page type in the admin view under **Content Type > Page Types**, click **Settings**, change the settings, and click **Save**.

Because you can identify page types and their properties in code or from the admin view, you can change some settings from admin view. If a page type is created from code, this is shown on the page type information page under **General**.



Note: You cannot delete certain page types defined in code. These are typically page types upon which other page types are based, such as the standard or default page and the start page.

Using the Access level area, you can define which users or user groups will have access to the page type.



Tip: You can watch the following demonstration video, [Making a page type available for some users but not for others](#). (3:06 minutes)

Creating a page type from admin view

1. On the **Manage Page Types** tab, select **Create New Page Type**.
2. Set values in the **Information** tab.

Field	Description
Name	Enter the name of the page type.
Display name	Enter the name to be displayed in the list of available page types.
Description	The text describing the page type, appears in the list of available page types.
Sort index	Determines the sorting (ascending sort order) in the list of available page types in edit view; default is 100.
Available in edit view	Makes the page type available for selection when creating new pages in the editorial interface. You should hide page types that are rarely used by editors, such as the start page type. You can make these available when needed, and then hide them again.

Field	Description
Display Template	<p>Select one of the following templates to be used for the page type:</p> <ul style="list-style-type: none"> • Web Form template path. Enter a path to the aspx page template file that displays the content of the page. • Web form template. Select a Web Forms template that the page type is associated with. If your developer created several templates using type classes, these appear in the list. • MVC template. Select a MVC template with which the page type is associated. If your developer created several templates using type classes, they appear in the list.
Registered template	<p>Select to use registered page templates for displaying content. The registered page templates are available for selection in the drop-down list. You then can associate a page type with predefined page templates to display the same content using different channels.</p>
Advanced information	<p>Displays information about the GUID globally unique identifier, class name and assembly name for the page type.</p>
Access level	<p>Determines the users and user groups for which the page type is available when creating new pages. The default setting is Everyone (available to all users and groups). See Access rights</p> <p>Do the following to limit access rights for a page type:</p> <ol style="list-style-type: none"> Clear the Create check box to remove Everyone from the access level setting. Click Add users/Groups and select the relevant users or groups. Make sure that the Create check box is selected for the desired users and groups.

3. Set values on the **Default Values** tab.

You can set default values for some of the built-in properties in Episerver CMS from admin view. You can also specify default values for the properties from code, but these are not visible in the admin view.

Edit "Standard Page" ?

Edit the basic information about the page type.

Information
Default Values
Available Page Types

Use adjusted default settings for pages using this page type

Start Publish Date minute ▼
Set "Start publish date" relative to when the page has been created

Stop Publish Date minute ▼
Set "Stop publish date" relative to when the page has been created

Display in navigation

Sort index

Sort subpages According to creation date (latest first) ▼

Archive to ...

Target Frame Open the link in a new window ▼

Save
 Revert to Default
 Cancel

Property	Description
Start Publish Date	Select the Use adjusted default settings... and the value in time when the system should publish the page after it is created. Mostly used for news pages that are available on the website for a short time.
Stop Publish Date	Select the Use adjusted default settings... and the value in time when the system should stop the page from being published. Mostly used for news pages that are available on the website for a short time.
Display in navigation	Select this option if the page type, for example, a news item page that should never be displayed in menus for navigation. This is done by clearing the Display in navigation property, which is then the default value for this page type.
Sort index	
Sort subpages	Select how you want the pages to be sorted, according to creation date or other.

Property	Description
Archive to	Browse the path to where you want the pages archived. Then, you can run a scheduled job to clean up archived pages as described in Scheduled jobs .
Target frame	Select if the page should be opened in a new window or in the same window.

4. Set values on the **Available Page Types** tab.

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

The screenshot shows the 'Edit "Standard Page"' dialog box with the 'Available Page Types' tab selected. It includes radio buttons for 'Use Default Settings', 'All', 'None', and 'Selected'. Below is a table of page types with checkboxes and descriptions.

	Name	Description
<input checked="" type="checkbox"/>	[Specialized] Contact	
<input checked="" type="checkbox"/>	[Specialized] Container Page	
<input checked="" type="checkbox"/>	[News] Article	
<input checked="" type="checkbox"/>	[Default] Standard Page	
<input checked="" type="checkbox"/>	[Specialized] Search Page	
<input checked="" type="checkbox"/>	[Specialized] Start Page	
<input checked="" type="checkbox"/>	[Products] Product	
<input checked="" type="checkbox"/>	[Specialized] Landing Page	
<input checked="" type="checkbox"/>	[Default] News Page	
<input checked="" type="checkbox"/>	Root Page	Used as root/welcome page
<input checked="" type="checkbox"/>	Trash	Used as recycle bin for the website

Buttons: Save, Revert to Default, Cancel

Option	Description
Use Default Settings	Revert to default settings as defined in code for this page type.
All	Create pages based on all page types available in edit view.
None	Cannot create child pages for this page type.
Selected	Manually select the available page types.

5. Click **Save**.

Copying an existing page type

When you copy a page type, its properties are copied also. You can then edit the information for the page type and its properties. Copy a page type as follows:

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

Note: Copied page types are untyped and you need to add the path to the display template, otherwise pages based on the page type will not have a preview.

Block types

Block types are similar to page types, and you can modify some settings from admin view.


[AlloyTech] Text block ?


Simple block that displays a main heading and a XHTML text.

Information

Name TextBlock

Display name

 Settings

 Add Property

	Name	Field name	Type	Required	Localized	Searchable	Tab	From code
↓	Heading	Heading	String (<= 255)		Yes	Yes	Content	Yes
↑	Text	Text	XHTML string (>255)		Yes	Yes	Content	Yes

Edit the settings for an existing block type as follows:

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

Other content types

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



Converting pages

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

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

Note: All page versions are converted. Therefore, ensure that no users are working with the page types to be converted.

A page property in the new page type can be mapped only to one old page property.

1. Select **Convert Pages** from the **Manage Content Types** tab under **Content Type** in admin view.

Convert Pages ?

Converts one or several pages in the tree structure from one page type to another page type.
Note! This operation is irreversible and content may be permanently removed.

Select pages to convert

Convert the selected page and all subpages (of the selected page type)

Convert from Page Type	Convert to Page Type
Standard Page ▼	Contact ▼

Convert from Property	Convert to Property
MetaTitle	MetaTitle ▼
PageImage	PageImage ▼
MetaKeywords	MetaKeywords ▼
TeaserText	TeaserText ▼
HideSiteHeader	HideSiteHeader ▼
MetaDescription	MetaDescription ▼
HideSiteFooter	HideSiteFooter ▼
MainBody	Remove property permanently ▼
MainContentArea	Remove property permanently ▼
DisableIndexing	DisableIndexing ▼

2. Select a page in the **Select pages to convert** field.
3. Select the **Convert the selected page and all subpages (of the selected page type)** check box if you want all the subpages to be included in the conversion.
4. Select the page type that you want to convert **from** in the **Convert from Page Type** list. The list of page properties included in that page type updates in the **Convert from Property** list.
5. Select the page type that you want to convert **to** in the **Convert to Page Type** list. The list of page properties included in that page type updates in the **Convert to Property** list.
6. Map each page property to a corresponding property in the page type to which you want to convert.
7. Click **Convert**.
8. To test the conversion, click **Test Conversion and Show Log**, which displays a detailed log of converted pages and page properties.

Warning: Selecting **Remove property permanently** deletes the property, which may damage existing content that uses the property.



Managing visitor groups

Personalization in Episerver lets you target website content to selected visitor groups. The personalization feature is based on customized visitor groups that you create based on a set of **personalization criteria**. Episerver provides a set of basic criteria such as geographic location, number of visits, and referring search phrase. You can also develop customized criteria.

Built-in visitor group criteria

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

Visitor group criteria	Description
Site Criteria	<ul style="list-style-type: none"> • Number of Visits. Matches the number of times the visitor has visited the website. You can specify Less than, Equal, or More than, within a number of days (weeks, months or years), or since a date, or in total. For example, <i>Less than 1 [visit] within 10 days.</i> • User Profile. Matches a value stored in a user's profile. You can specify Last Name, First name, Company, Address, Title, or email address. Each item can be equal to, contained in, start with or end with the specified value. For example, <i>Company Equals ExampleCo.</i> See Example: Site criteria and points example. • Visited Category. Select one of the website's page categories. You can also select a number of pages that use the category and were visited. The visitor must have visited the specified number of pages to which the category is applied. For example, <i>Category X viewed at least 3 pages out of a total of 6.</i> • Visited Page. Select one site page. The visitor must have visited that page during the current session.
Time and Place Criteria	<ul style="list-style-type: none"> • Time of Day. Matches the visitor's time period with the start time, end time (15-minute intervals), and days you specify. For example, <i>From 2:00 PM to 4:15 PM on Monday, Tuesday, and Friday.</i> <p>Depending on your system configuration, you may also have:</p> <ul style="list-style-type: none"> • Geographic Coordinate. Uses the visitor's approximate location in a geo-location database (based on visitor IP address). Drag the marker to the map (Google maps), and select a radius around that point to indicate the vis-

Visitor group criteria	Description
	<p>itor's proximity to the location. See Example: Geographic coordinate.</p> <ul style="list-style-type: none"> • Geographic Location. Matches the visitor to a specific continent, country, and region. For example, <i>Continent: Europe, Country: Norway, Region: Oslo</i>. You can also specify a wildcard for country and region. For example, Country N* in Europe yields Netherlands and Norway. See Example: Geographic location. <p>For more information on how Geographic coordinate and Geographic location are manually enabled, see Enabling a Geolocation provider in Configuring personalization on Episerver World.</p>
URL Criteria	<ul style="list-style-type: none"> • Landing URL. Matches the URL with which the visitor enters the site. You can decide if the landing URL is equal, starts with, or ends with the with a specified value. For example, <i>contains www.example</i> to match <i>www.example.com, www.exampleURL.com</i> and so on. • Referrer. Matches the Host name or URL of the referred page that was clicked before entering the site, such as a search engine result page. You can decide if the referrer criteria matches on equal, contain, start with, or end with a specified value for the whole or parts of the Host name or URL. See Example: Referrer. • Search Keyword. Stores the URL of the referred page that was clicked before entering the site, such as the URL of a search engine result page. Your partner developer can define this criteria to specify the search word to match against the URL by a regular expression. The regular expression finds search words in the URL. <p>Note: This criterion is not compatible with Google due to privacy restrictions for Google searches.</p>
Visitor Groups	<p>Visitor Group Membership. Select members from existing visitor groups. For example, <i>Member of Job Applicants</i>, or <i>Not a Member of Start Customer Club</i>.</p>
Episerver Forms (Episerver Forms is an add-on and must be installed separately.)	<ul style="list-style-type: none"> • Submitted Form. Matches when a visitor submits (or does not submit) a particular form that you select from a drop-down list. For example, <i>Has Submitted Job Application</i>. See Example: Form and form values. • Submitted Form Value. Matches when a visitor submit a particular form value. See Example: Form and form values.

Visitor group criteria	Description
	<p>Note: The Episerver Forms Samples package must be installed for the forms visitor group criteria to work. See Episerver Forms Samples package for information.</p>

Managing visitor groups

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

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

Creating a visitor group

1. From the top menu, select **CMS > Visitor Groups**.
2. Click **Create**.

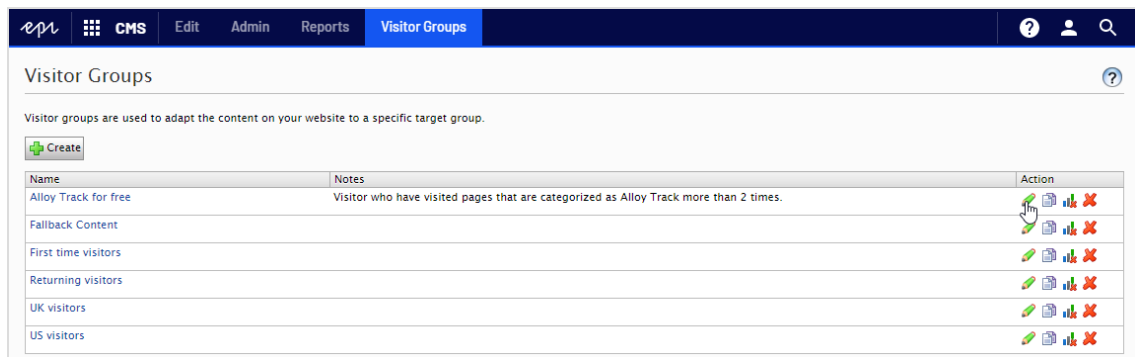
3. In the **Criteria** section, click to add criteria for the visitor group as follows:
 - a. In the **Match** drop-down list, select the criteria to match **All**, **Any** or **Point**. What you select affects all criteria for the visitor group. Using points is a way to set a value for what a desired action on the web-site is worth.
 - b. Drag the criteria from the pane on the right and drop it into the **Drop new criterion here** area.
4. Make the settings for the criteria, see examples described in [Examples of creating visitor groups](#).
5. In **Name**, name the visitor group you are creating. This name appears in the personalized content box when you select the content on a page.
6. In **Notes**, type a descriptive text about the visitor group you have created, for example, its purpose. This description appears as a tooltip when the editor is adding a visitor group to the content on a page.
7. In **Security Role**, select the check box if you want this visitor group to be available when setting access rights for pages and files in admin view.


Note: Visitor groups only have read access.

- In **Statistics**, keep the check box selected to enable statistics for the visitor group (this check box is selected by default).
- Click **Save**.

Editing a visitor group

- From the top menu, select **CMS > Visitor Groups**.



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

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

Copying a visitor group

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



Deleting a visitor group

- From the top menu, select **CMS > Visitor Groups**.
- Click **Delete** for the visitor group you want to delete.
- Confirm the deletion.


Viewing and clearing statistics

To view visitor group statistics, add the Visitor Groups Statistics gadget to your dashboard or to one of your panes. See [Managing gadgets](#) for more information on adding gadgets.

Before the gadget can display any statistics, you need to configure the gadget:

1. Click the **Change the settings** link or the gadget's Settings icon  and then **Edit**.
2. In the **Statistic View** section, select the type of chart you want to see.
3. Select the visitor groups you want to include in your statistics.
4. Filter the display by day, month and year.
5. Click  to select the start and end dates in the statistics interval.
6. Click **Ok**.

Clear the statistics from the database as follows:

1. From the top menu, select **CMS > Visitor Groups**.
2. Click **Clear statistics** .
3. Confirm the deletion.

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

Examples of creating visitor groups

Site criteria and points

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

Edit Visitor Group

Adapt content on your website by first creating visitor groups and then using the groups to target the content on pages.

Criteria

Match **Points** ▼

Drop new criterion here

Number of Visits More than 1 Since 5/16/2016 2 p Required

Geographic Location Continent: Europe Country: Sweden Region: Any 2 p Required

Threshold 1/4

Other Information

Name: From Sweden

Notes: This visitor group lets editors present relevant content to a particular geographical area. The group can be as broad as "by continent," can be narrowed to a particular country, and even to a specific region, state, or province. In this group, content is targeted at website visitors from Sweden.

Security role: Make this visitor group available when setting access rights for pages and files

Statistics: Enable statistics for this visitor group

Capture screenshot. Save Cancel

EPIserver forms: Submitted form, Submitted form value

Site Criteria: Time and Place Criteria, URL Criteria, Visitor Groups

1. In the **Match** drop-down list, select the criteria to match **Point**.
2. Drag and drop the **Visited Page** criterion, and select page. Drag and drop the criteria again to add several pages.
3. Drag and drop the **Number of Visits** criterion, and select **More than > 1 > Since [date]**. (To create a visitor group for visitors who have never visited the page, select **Less than > 1 > Since [date]**.)

Number of Visits More than 1 Since 5/16/2016 2 p Required

4. Enter the number of points each criterion is worth, and select whether or not the criterion is required.
5. Select **Threshold** for the criteria you added in your visitor group. For example, the visitor must fulfill 1 of 3 criteria to be included in the visitor group.
6. Click **Save**.

Geographic location

Note: A developer may have to configure your implementation for geographic

location to work. See [Enabling a Geolocation provider](#) in [Configuring personalization](#) on Episerver World.

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

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

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

Geographic coordinate

Note: A developer may have to configure your implementation for geographic coordinate to work. See [Enabling a Geolocation provider](#) in [Configuring personalization](#) on Episerver World.

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

1. Drag and drop the **Geographic Coordinate** criteria, and click **Select Location**.
2. Click **Select location** to display a map that you click to set a location. You can zoom in the map for more precise locations.
3. Select the **Radius [number of kilometers or miles]**.

4. Click **Save**.

Referrer

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

- search for *episerver and cms* on Google.com
 - from the search result page, click the Episerver landing page link
1. Drag and drop the **Referrer** criteria, and select **URL > Equals >** the URL of the search engine result page, for example, <https://www.google.se/#hl=sv&source=hp&biw=1338&bih=790&q=episerver+cms>.

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

Form and form values



Note: Episerver Forms and the Episerver Forms Samples package must be installed for the forms visitor group criteria to work.

You can base a visitor group on whether the visitor has (or has not) submitted a particular form or form value. For example, you can target content to visitors who submit a Job Application form:

You can target content to visitors that give you a low rating on a Satisfaction Survey.

Additional visitor group criteria

You can extend the built-in visitor group criteria as follows:



Episerver Commerce criteria

Visitor group criteria specific for e-commerce, such as customer properties, markets, and order frequency criteria. See Personalization for Commerce.



Episerver Visitor Group Criteria Pack

Episerver Visitor Group Criteria Pack is an add-on and requires a separate installation, but no license. It provides additional useful visitor group criteria, which you can use to configure your content for personalization purposes.

- **Display Channel** matches the visitor's current display channel when visiting the website, that is, it distinguishes between web and mobile visitors. From the **Technical Criteria** category, drag and drop the **Display Channel** criterion, and select **Mobile** or **Web** channel.

- **IP Range** matches the IP range **equal to** or **above** a defined IP number, used by the visitor when visiting the website.
 - **Equal to.** To match with an exact IP address, select the equal sign (=) and enter the exact IP address:

- **Above.** If you use the greater than or equal to sign (>=), a comparison between the visitor's IP address and the configured IP address is made. Each IP address consists of a number of segments, each separated by a dot. If the number of segments in the visitor's IP address are fewer than the configured IP address, the condition is not satisfied. If the visitor's IP address has as many or more segments as the configured IP address, each segment is compared between the visitor's IP address and the configured IP address, in turn from left to right. If none of the segments of the visitor's IP address are less than the segments of the configured IP address, the visitor group criteria is considered met.

- **OS & Browser** matches the visitor's operating system and browser the visitor used when visiting the website. You can drag and drop the criterion several times to add multiple operating system and browser

criteria.

OS & Browser	Operating System	Android
	Browser or User-Agent	Contains Mozilla

- **Role** matches the visitor's access role when visiting the website. You can include roles by using the **In Role** condition and exclude roles by using the **Not in role** condition.

Role	Condition	In role
	Role Name	WebAdmins
Role	Condition	Not in role
	Role Name	CmsEditors

- **Selected Language** checks which language the visitor is viewing a page in when using fallbacks. For example, check if the visitor views a page in English by selecting the **In** condition, or not in Svenska language by selecting the **Is Not** condition. Languages which are defined and enabled are available in the list.

Selected Language	Condition	Is
	Selected Language	English
Selected Language	Condition	Is Not
	Selected Language	svenska

- **Download File** matches a specific file which is considered already been viewed or loaded by browsers. The file path can be the file name only or a relative path to a file. If the path to a loaded image contains the configured path, the visitor group criterion is considered met. You can use this criterion to, for example, check if the image *CompanyLogo.png* has been viewed by entering the path to the image:

Downloaded file	Path	assets/images/CompanyLogo.png
-----------------	------	-------------------------------

- **Event** matches a set time period.
 - Recurrence can be:
 - **Every Month**. Occurs at a specific day in every month, with start from the set **Start Time**.
 - **Every Year**. Occurs once a year at a specific day, with start from the set **Start Time**.
 - **Never**. Not in the time period specified between **Start Time** and **End Time**.
 - If **Every Month** or **Every Year** recurrence type is selected, **End Time** is disabled

For example, you can configure this visitor group criterion for sale events which occurs the first day of every month by selecting the **Every Month** recurrence.

- **Query string** matches the request to see if it contains a query string key with the specified value. Conditions can be:
 - **Exist.** Checks only if the key exists in query string.
 - **Has Value.** Checks both the key and the value represented in URL's query string.

When the **Exist** condition is selected, the **Value** text box is disabled.

- **Time On Site** matches the total length of time of a user's visit since the session start. If the total length of time is greater than or equal to the configured time, then the visitor group criterion is considered met.
 - **Duration Unit.** The duration time can be **Seconds, Minutes** or **Hours**.
 - **Time On Site.** The value range is from 0 to 60.

- **Time Period** matches the time and date of the visit. If it is within the specified time period, the visitor group criterion is considered met. From the **Time and Place Criteria** category, drag and drop the **Time Period** criterion.



Episerver Marketing Automation

Visitor group criteria specifically designed for marketing automation.

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Episerver Digital Experience Cloud

The Episerver Digital Experience Cloud™ unifies digital content, commerce and marketing in one platform, including omnichannel solutions for intelligent campaigns. The platform uses artificial intelligence and behavioral analytics to deliver personalized experiences everywhere. With our secure, reliable platform you can quickly increase engagement, revenue and productivity, while getting the fastest time to value.

About Episerver

At Episerver, we believe digital transformation is a journey. We have been guiding customers for more than 20 years in providing standout digital experiences. Today our network of 880 partners, in 30 countries, supports 8,000 customers and over 30,000 websites. Founded in 1994, Episerver has offices in the US, UK, Sweden, Australia, Germany, Denmark, Finland, Norway, Poland, the Netherlands, Spain, South Africa, Singapore, Vietnam and the UAE.

For more information, visit [episerver.com](https://www.episerver.com).

