



# Optimizely CMS

Administrator User Guide



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Optimizely CMS Administrator User Guide

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# Table of contents

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|  |           |
|--|-----------|
| <b>Introduction</b> .....                              | <b>10</b> |
| Features, licenses and releases .....                  | 11        |
| Images and screenshots .....                           | 12        |
| Notes .....  | 13        |
| Copyright notice .....                                 | 13        |
| Roles and tasks .....                                  | 14        |
| Visitor and customer .....                             | 14        |
| Community member and moderator .....                   | 14        |
| Recipient .....  | 14        |
| User .....   | 15        |
| <b>What's new?</b> .....                               | <b>18</b> |
| Release notes 2021 .....                               | 18        |
| Archived documentation .....                           | 22        |
| <b>Getting started</b> .....                           | <b>23</b> |
| Logging in .....                                       | 23        |
| Accessing features .....                               | 23        |
| Navigation .....                                       | 24        |
| Next steps .....                                       | 24        |
| <b>Administration interface</b> .....                  | <b>26</b> |
| Administration view .....                              | 26        |
| Visitor groups .....                                   | 26        |
| More on administration .....                           | 27        |
| Administration in Optimizely Commerce .....            | 27        |
| Administration in Optimizely Search & Navigation ..... | 27        |
| <b>Access rights</b> .....                             | <b>28</b> |
| Built-in user groups .....                             | 31        |

---

|   |           |
|---|-----------|
| Setting access rights .....                                 | 32        |
| Setting inheritance for content subitems .....              | 35        |
| Setting access rights for all subitems .....                | 38        |
| Removing a user or group from the access rights list .....  | 41        |
| Using a visitor group in an access rights list .....        | 41        |
| Access rights for languages .....                           | 44        |
| Access rights for the Optimizely platform .....             | 44        |
| Managing users and user groups .....                        | 44        |
| Creating, editing and deleting users .....                  | 45        |
| Creating and deleting groups in CMS .....                   | 49        |
| <b>Scheduled jobs .....</b>                                 | <b>51</b> |
| Administering scheduled jobs .....                          | 51        |
| Built-in scheduled jobs .....                               | 52        |
| Archive Function .....                                      | 52        |
| Automatic Emptying of Trash .....                           | 52        |
| Change Log Auto Truncate .....                              | 52        |
| Clear Thumbnail Properties .....                            | 53        |
| Fetch data from Marketing Connectors .....                  | 53        |
| Link Validation .....                                       | 53        |
| Marketing Test Monitor .....                                | 54        |
| Mirroring Service .....                                     | 54        |
| Monitored Tasks Auto Truncate .....                         | 54        |
| Notification Dispatcher .....                               | 54        |
| Notification Message Truncate .....                         | 55        |
| Publish Delayed Content Versions .....                      | 55        |
| Remove Abandoned BLOBs .....                                | 55        |
| Remove Permanent Editing .....                              | 55        |
| Remove Unrelated Content Assets .....                       | 56        |
| Subscription .....  | 56        |
| Trim Content Versions .....                                 | 56        |
| Optimizely Commerce-related scheduled jobs .....            | 56        |
| Optimizely Search & Navigation-related scheduled jobs ..... | 56        |
| Other scheduled jobs .....                                  | 57        |
| <b>Exporting and importing data .....</b>                   | <b>58</b> |

---

|   |           |
|---|-----------|
| Exporting data .....  | 58        |
| To export content items .....   | 59        |
| Importing data .....  | 60        |
| <b>Managing custom content types .....</b>                            | <b>63</b> |
| <b>Change Log .....</b>   | <b>64</b> |
| <b>System settings .....</b>  | <b>67</b> |
| General tab .....   | 67        |
| Editing tab .....   | 68        |
| <b>Managing websites .....</b>  | <b>71</b> |
| Requirements .....  | 72        |
| Adding and updating a website from admin view .....                   | 72        |
| <b>Managing website languages .....</b>                               | <b>77</b> |
| Language overview .....   | 77        |
| Adding and enabling languages .....                                   | 78        |
| 1. Adding and editing languages .....                                 | 78        |
| 2. Enabling a language on a website (if not already done) .....       | 80        |
| 3. Enabling a language for editing in CMS .....                       | 81        |
| Deleting an existing language .....                                   | 83        |
| <b>Managing approval sequences .....</b>                              | <b>84</b> |
| How it works .....  | 84        |
| Content approvals on assets .....                                     | 86        |
| Content approvals on multi-language sites .....                       | 88        |
| Setting up an approval sequence .....                                 | 89        |
| Setting up an approval sequence (single language website) .....       | 89        |
| Setting up an approval sequence for children items .....              | 90        |
| Setting up an approval sequence on a multiple languages website ..... | 91        |
| Editing an approval sequence .....                                    | 93        |
| Approving and canceling approval sequences .....                      | 94        |
| Deleting an approval sequence .....                                   | 94        |
| Commenting on content approvals .....                                 | 95        |
| Four-eyes principle .....   | 95        |

---

|   |            |
|---|------------|
| Using notifications .....   | 96         |
| User interface notifications .....                                  | 97         |
| Email notifications .....   | 97         |
| <b>Creating categories .....</b>                                    | <b>98</b>  |
| Adding a category .....   | 98         |
| Deleting or changing a category .....                               | 99         |
| <b>Editing frames and tabs .....</b>                                | <b>100</b> |
| Frames .....  | 100        |
| Tabs .....  | 100        |
| Adding and editing a tab .....                                      | 101        |
| <b>Permissions for functions .....</b>                              | <b>102</b> |
| Setting of access rights from Permissions for Functions .....       | 102        |
| Adding/changing permissions to a function for a group or user ..... | 102        |
| Deleting permissions to a function for a group or user .....        | 103        |
| <b>Tool settings .....</b>  | <b>104</b> |
| Plug-in Manager .....   | 104        |
| Rebuild name for web addresses .....                                | 105        |
| Creating a rebuilding name for web address .....                    | 106        |
| Mirroring .....   | 106        |
| Creating a channel .....  | 107        |
| Configuring A/B testing .....                                       | 111        |
| Search configuration .....  | 113        |
| Enabling search providers .....                                     | 113        |
| <b>Properties .....</b>   | <b>114</b> |
| Property types .....  | 114        |
| Editing and adding properties on content types .....                | 115        |
| Editing a property .....  | 115        |
| Adding a property .....   | 116        |
| Defining language-specific properties .....                         | 118        |
| Setting a property to be language-specific .....                    | 119        |
| Organizing properties in content .....                              | 120        |
| Changing the order of properties .....                              | 121        |

---

|  |            |
|--|------------|
| Placing a property on a tab .....                  | 122        |
| Configuring customized property settings .....     | 122        |
| Priorities and configuration .....                 | 122        |
| Creating custom property types .....               | 122        |
| <b>Content types .....</b>                         | <b>125</b> |
| Content types and properties .....                 | 125        |
| Page types .....                                   | 127        |
| Editing a page type .....                          | 128        |
| Creating a page type from admin view .....         | 129        |
| Copying an existing page type .....                | 134        |
| Block types .....                                  | 134        |
| Other content types .....                          | 135        |
| Converting pages .....                             | 135        |
| <b>Managing visitor groups .....</b>               | <b>138</b> |
| Managing visitor groups .....                      | 140        |
| Creating a visitor group .....                     | 141        |
| Editing a visitor group .....                      | 142        |
| Copying a visitor group .....                      | 143        |
| Deleting a visitor group .....                     | 143        |
| Using a visitor group to personalize content ..... | 143        |
| Viewing and clearing statistics .....              | 143        |
| Examples of creating visitor groups .....          | 144        |
| Site criteria and points .....                     | 144        |
| Geographic location .....                          | 146        |
| Geographic coordinate .....                        | 146        |
| Referrer .....                                     | 147        |
| Form and form values .....                         | 147        |
| Additional visitor group criteria .....            | 148        |
| Optimizely Commerce criteria .....                 | 148        |
| Optimizely Visitor Group Criteria Pack .....       | 148        |
| Optimizely Marketing Automation .....              | 152        |
| <b>Index .....</b>                                 | <b>153</b> |







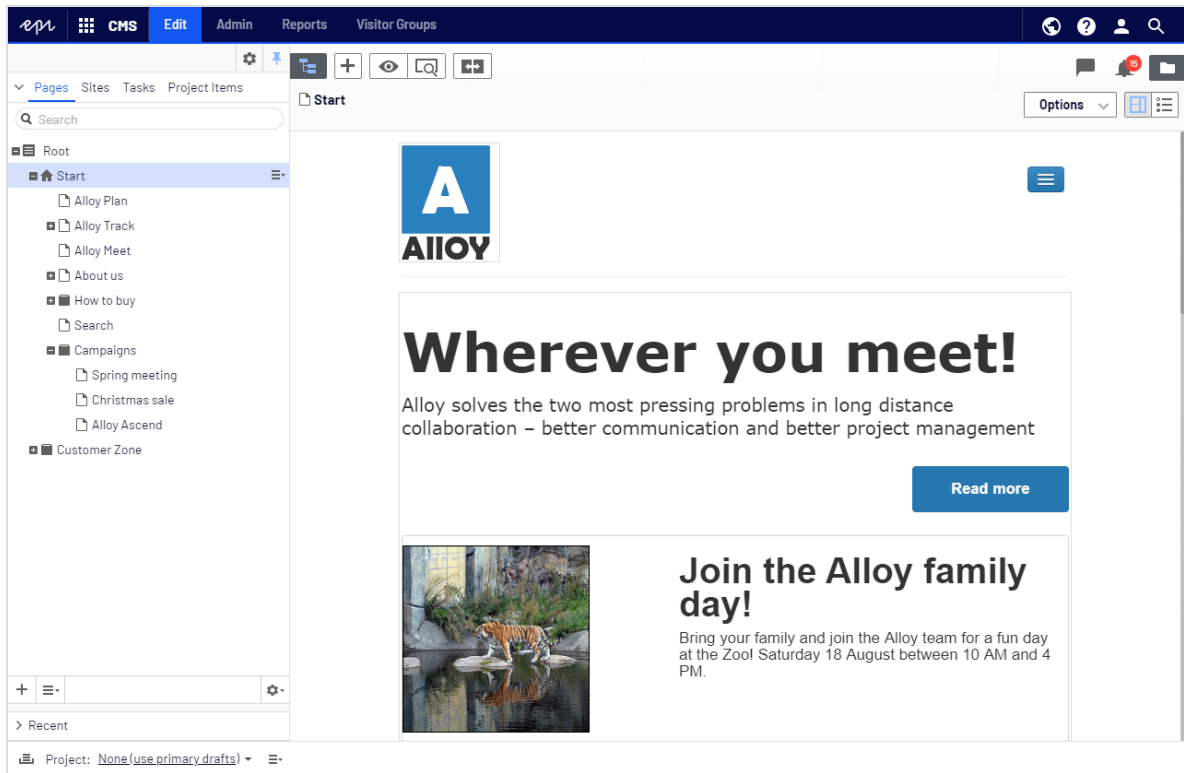
# Introduction

Online help describes the features and functionality of the [Optimizely Digital Experience platform](#) and covers Optimizely CMS for content management, Optimizely Commerce for e-commerce functionality, Optimizely Campaign for omnichannel campaigns, Optimizely Search & Navigation for extended search, Optimizely Visitor Intelligence for visitor profiles and customer segments, Product and Email Product Recommendations, and Triggered Messages for personalized product recommendations, and Optimizely add-ons.

You access the online help from within the Optimizely platform or from [Optimizely 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 Optimizely CMS, which you can find on [Optimizely World](#). Developer guides and technical documentation also are found on [Optimizely 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 Optimizely platform.



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



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



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

ation.



Optimizely Search & Navigation adds advanced search functionality to websites. It is included in the Optimizely Cloud services; for on-premises installations it requires a specific installation and license.



Optimizely Visitor Intelligence 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 Product 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 Optimizely 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 Optimizely 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 Optimizely user guide uses images and screenshots to visually guide you through the features of the Optimizely 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.

## Copyright notice

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## Roles and tasks

Optimizely is designed to interact with website visitors, and for collaboration among users of the platform. This topic describes typical roles and related tasks used in scenarios. See [Setting access rights in the CMS Administrator User Guide](#) to configure user groups and roles in Optimizely.

### 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. A customer can purchase on an e-commerce website "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

A *community member* or a visitor can add content, 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 an editor, or a specific *moderator* role for large websites and online communities may need to monitor this type of content on the website.

### 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 that are used for omnichannel marketing. You can track and analyze recipient actions, such as clicking links in an email, providing input to website owners and users for further marketing actions.

## User

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

### *Website owner*

A *website owner* is someone with overall business and/or technical responsibility for the content and performance of one or more websites. The website owner may monitor reports for 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.

### *Content editor*

A *content editor* is someone with access to the editorial interface who creates and publishes content on the website. Content editors with understanding 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 rates 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. The marketer also monitors campaign KPIs (key performance indicators) to optimize page conversion. A marketer with understanding 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. A merchandiser 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.

## *Customer Service Representative*

A *customer service representative* (CSR) works in the Optimizely Commerce order management user interface. Tasks may include updating or creating orders, updating customer information, and managing subscriptions and payments. The manual order work is often initiated by customers through a support function.

## *Administrator*

An *administrator* configures 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 Optimizely platform. They may also have administration access to integrated third-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



third-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 Optimizely platform software and services. New features are continuously made available. See [Optimizely 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 Optimizely implementation.

This release of the Optimizely User Guide describes features available in Optimizely as of 2021-08-02. See release notes (below) for update history. See Archived documentation in the online version of the user guide for previously released user guides and for older release notes.

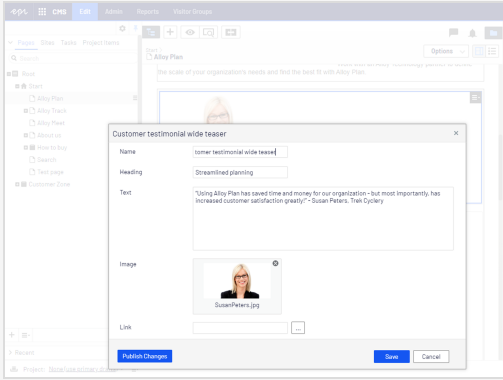
## Release notes 2021

| Released   | Area                            | Features and updates   |
|------------|---------------------------------|--|
| 2021-08-02 | Campaign                        | The redesigned user interface has been released. Optimizely Campaign screenshots in the user guide have been updated. See Start page.  |
| 2021-07-22 | Marketing automation connectors | The Pardot connector has a breaking change when you upgrade to version 6. The configuration screen has new fields to create new connectors. Configurations made with older versions of the Pardot connector will no longer work. |

| Released   | Area                            | Features and updates   |
|------------|---------------------------------|--|
| 2021-07-20 | Campaign                        | You can now create webhooks for the <i>unsubscribe</i> event. ( <a href="#">update 373</a> )   |
| 2021-07-13 | Email Product Recommendations   | New strategy: Recommendations from categories of purchased products (last 365 days)  |
| 2021-06-24 | Campaign                        | If you use the coupon system, you can now optionally create QR codes. You can also use field functions to generate QR codes that refer to specific recipient list fields. ( <a href="#">update 371</a> ) |
| 2021-06-17 | Campaign                        | See Deliverability basics for information about the BIMI email authentication standard.  |
| 2021-06-14 | B2B Commerce                    | <a href="#">Spire roles</a> documented.  |
| 2021-06-09 | B2B Commerce                    | <a href="#">Adyen payment gateway</a> plug-in documented.  |
| 2021-05-27 | Marketing automation connectors | Fields were added to the Acoustic (Silverpop) Connector setting screen to include database lists. ( <a href="#">update 368</a> )   |
| 2021-05-13 | Campaign                        | In Deep Analytics, you can use separate groupings for the name and ID of mailings, recipient lists, and clients. See Groupings. ( <a href="#">update 366</a> )   |
| 2021-04-29 | Triggered Messages              | A new feature was added to the Targeted Discount daily trigger to enable the trigger to fire if products were added to a basket but not purchased within the last 30 days.                               |
| 2021-04-22 | Campaign                        | You can now create webhooks for the  |

| Released   | Area                 | Features and updates   |
|------------|----------------------|--|
|            |                      | <p><i>bounce</i> event. (<a href="#">update 364</a>)</p> <p>See Deliverability basics for information about list bombing and learn how to recognize these cyberattacks and protect yourself.</p>   |
| 2021-04-15 | Campaign             | See Deliverability basics for a glossary of the most important terms related to deliverability.  |
| 2021-03-31 | Campaign             | <p>The beta phase of the webhook feature has been expired. You can now create webhooks for the <i>sent</i> event and optionally submit the Basic HTTP Authentication header. You can also verify and update webhooks via REST API. See Webhooks. (<a href="#">update 362</a>)</p> <p>You can now display background images in grouping paragraphs and sidebars in the mobile newsletter version. You can also automatically stretch or crop the image to fill the entire paragraph area. See Grouping paragraph. (<a href="#">update 362</a>)</p> <p>The beta phase of the A/B tests for transactional mails feature has been expired. This feature is now available for all users on request.</p> |
| 2021-03-25 | Visitor Intelligence | Visitor Intelligence now comes with a set of built-in filter definitions. It is also possible to add time and occurrence filters to segments to further limit matching profiles. See Creating a segment based on filter definition. ( <a href="#">update 360</a> )   |
| 2021-03-25 | Campaign             | In the Optimizely Campaign start menu  |

| Released   | Area         | Features and updates   |
|------------|--------------|--|
|            |              | <p>under Scheduled jobs, you can find an overview of the scheduled jobs configured in your client. (<a href="#">update 360</a>)</p> <p>If you use the coupon system, you can generate bar codes based on the values of your recipient list fields via field functions.</p>   |
| 2021-02-18 | Campaign     | <p>In the Marketing Automation's Advanced node, you can specify which recipients are passing through the Marketing Automation campaign at which time. You can now define even more precisely when Optimizely Campaign should check the criteria. For example, if you set the interval to <i>Every 2 months, each 1st from 14:00</i>, Optimizely Campaign checks the criteria on the first day of every second month at 14:00. (<a href="#">update 355</a>)</p> |
| 2021-02-04 | Campaign     | <p>If you use the recipient list management, you can now change the field name of recipient list fields. See Editing recipient list fields. (<a href="#">update 352</a>)</p>   |
| 2021-01-21 | B2B Commerce | <p>The end user documentation for B2B Commerce and Optimizely PIM has now been integrated in this user guide. See sections Optimizely B2B Commerce and Optimizely PIM.</p>   |
| 2021-01-21 | CMS          | <p>Edit and publish blocks in a quick edit view, which lets you edit relevant block properties without leaving the current context. (<a href="#">update 350</a>)</p>   |

| Released   | Area            | Features and updates   |
|------------|-----------------|--|
|            |                 |    |
| 2021-01-21 | Commerce        | <p>Customer service representatives can create <i>notes</i> associated with carts, orders, and subscriptions (<a href="#">update 349</a>).</p>   |
| 2021-01-21 | Personalization | <ul style="list-style-type: none"> <li>• Create reusable email templates</li> <li>• Export CSV data in localized format for the selected language</li> <li>• Users (with authorization) can change the currency selection</li> </ul> |
| 2021-01-21 | Campaign        | <p>You can now run A/B tests for transactional mails to send different variants of a transactional mail and check which variant performs better.</p>   |

## Archived documentation

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

# Getting started

This topic describes how to log in to an Optimizely 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.

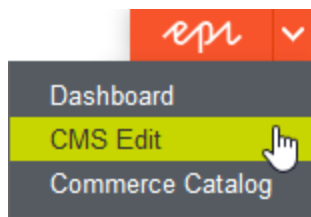
## Logging in

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 Optimizely 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 Optimizely 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.

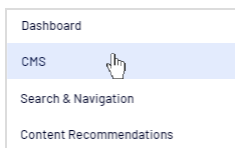


## Navigation

Navigation within CMS and to other parts of the Optimizely 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 Optimizely.

## Next steps

- The User interface and Roles and tasks topics describe the different parts of the user interface and the Optimizely 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.

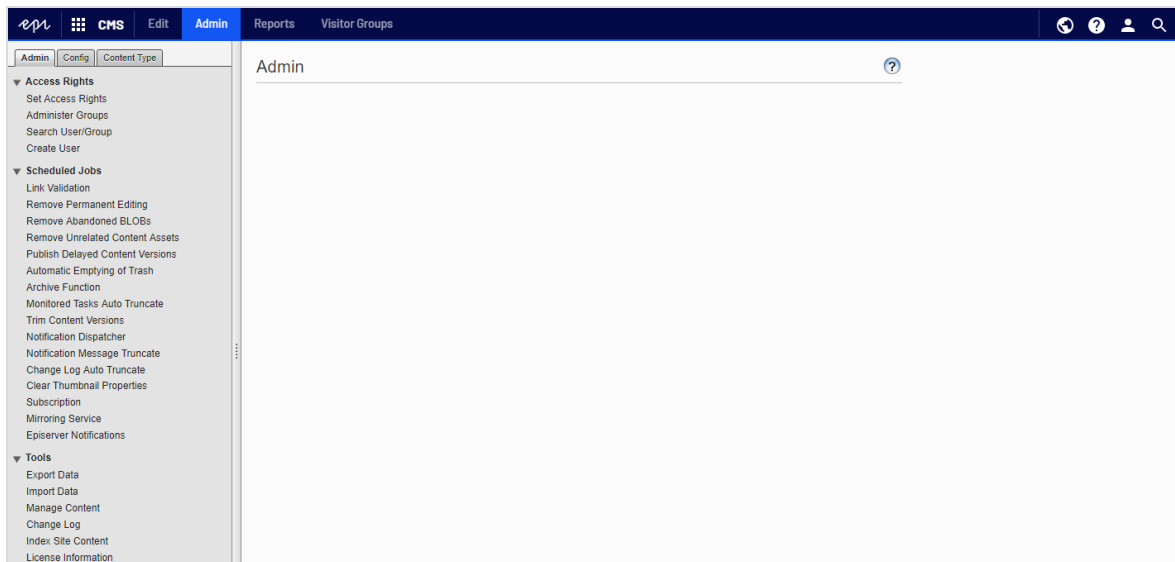


- Administration interface in the CMS Administrator User Guide to administer and configure settings in Optimizely.
- If you have Optimizely Commerce installed, see the Commerce User Guide to work with e-commerce tasks.
- If you have Optimizely Search & Navigation installed, see the Optimizely Search & Navigation User Guide to work with search optimization.

# Administration interface

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

## Administration view



The **Admin** view in CMS contains core administration features for the Optimizely 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 Optimizely Commerce

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

### Administration in Optimizely Search & Navigation

If you have added Optimizely Search & Navigation 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 Optimizely Search & Navigation.

## Access rights

By using access rights in Optimizely 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 Optimizely CMS, but you can give editors the right to manage access rights for a single page in edit view.



Video tutorial: [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   |
|---------------|---|
| <b>Read</b>   | The user or group can access the content as a reader; otherwise the content is invisible.   |
| <b>Create</b> | The user or group can create content under the content item on which this right is set.   |
| <b>Change</b> | 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. |

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

By default, Optimizely CMS has built-in user groups that align with user roles. You can extend predefined 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 Optimizely.

| Group                 | Description  |
|-----------------------|--|
| <b>Administrators</b> | 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.  |
| <b>WebAdmins</b>      | Comes with Optimizely 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 > <b>Admin</b> tab > <b>Access Rights</b> > <b>Administer Groups</b> > <b>Add</b> > <b>WebAdmins</b> .<br><br><b>Note:</b> Membership in <b>WebAdmins</b> does not provide editing access in the content struc- |

| Group             | Description  |
|-------------------|--|
|                   | <p>ture by default. In most cases, only a few system administrators or "super users" belong to this group.</p>   |
| <b>WebEditors</b> | <p>Comes with Optimizely and can access the editing view. To use this group, you must add it through admin view &gt; <b>Admin</b> tab &gt; <b>Access Rights</b> &gt; <b>Administer Groups</b> &gt; <b>Add</b> &gt; <b>WebEditors</b>.<br/>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> |
| <b>Everyone</b>   | <p>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 <b>Everyone</b> group, requires login to access content even if it is published.</p>  |

## 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 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 dialog box is titled "Add Users/Groups" and is divided into two main sections. The top section, "Search Users/Groups", includes a "Type" dropdown menu currently set to "Users", and two empty text input fields for "Name" and "E-mail address". A "Search" button with a magnifying glass icon is located below these fields. The bottom section, "Add Users/Groups", contains two list boxes. The "Existing:" list box on the left contains the names "Bob" and "Cam". The "Add:" list box on the right contains the name "Ann". Between the two list boxes 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 dialog are "OK" and "Cancel" buttons.

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"/> |

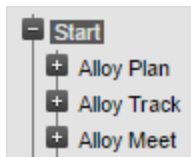
Inherit settings from parent item  
 Apply settings for all subitems

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"/> |
| <b>Ann</b>      | <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"/>            |
| <b>Zach</b>     | <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 Optimizely 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 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 Optimizely platform

See [Managing permissions](#) for more information about how to manage access rights for other parts of the Optimizely 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 Optimizely 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 Optimizely. See the [technical documentation on Optimizely 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 Robert

New password .....

Confirm password .....

E-mail address robert@example.com

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.

**Administer Groups** ?







---

Delete or add groups used to assign access rights.

[Cancel](#)

|   | Group           | Provider              | Delete  |
|---|-----------------|-----------------------|---|
|  | Marketing Group | SqlServerRoleProvider |  |
| <b>1</b>  |                 |                       |   |

Users of group "Marketing Group"

|   | Name | Provider                    | Delete  |
|---|------|-----------------------------|---|
|    | Ann  | SqlServerMembershipProvider |    |
|   | Bob  | SqlServerMembershipProvider |   |
|  | Cam  | SqlServerMembershipProvider |  |
| <b>1</b>  |      |                             |   |

- **User view.** Click 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. By default, Optimizely platform with Optimizely CMS and Optimizely 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 Optimizely 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 Optimizely CMS Admin interface. The left sidebar contains a navigation menu with 'Scheduled Jobs' expanded, listing various tasks. The main content area has a title 'Automatic Emptying of Trash' and a description: 'Specify whether the emptying function is active/inactive and how often trash should be emptied. The job will permanently delete content older than 30 days from trash.' Below the description are 'Settings' and 'History' tabs. The 'Settings' tab is active, showing a checkbox for 'Active' which is checked. The 'Scheduled job interval' is set to '1' with a dropdown menu set to 'week'. The 'Next scheduled date' is '2017-12-14 00:30'. At the bottom right, there are three buttons: 'Save', 'Start Manually', and 'Stop Job'.

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 Optimizely 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 Optimizely 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 **Optimizely 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 Optimizely 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

Optimizely 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.

## Optimizely Commerce-related scheduled jobs

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

## Optimizely Search & Navigation-related scheduled jobs

See Administration and configuration in the Optimizely Search & Navigation user guide for information about scheduled jobs for Optimizely Search & Navigation.



## 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 Optimizely 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.

- 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.
- 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 Optimizely 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*.

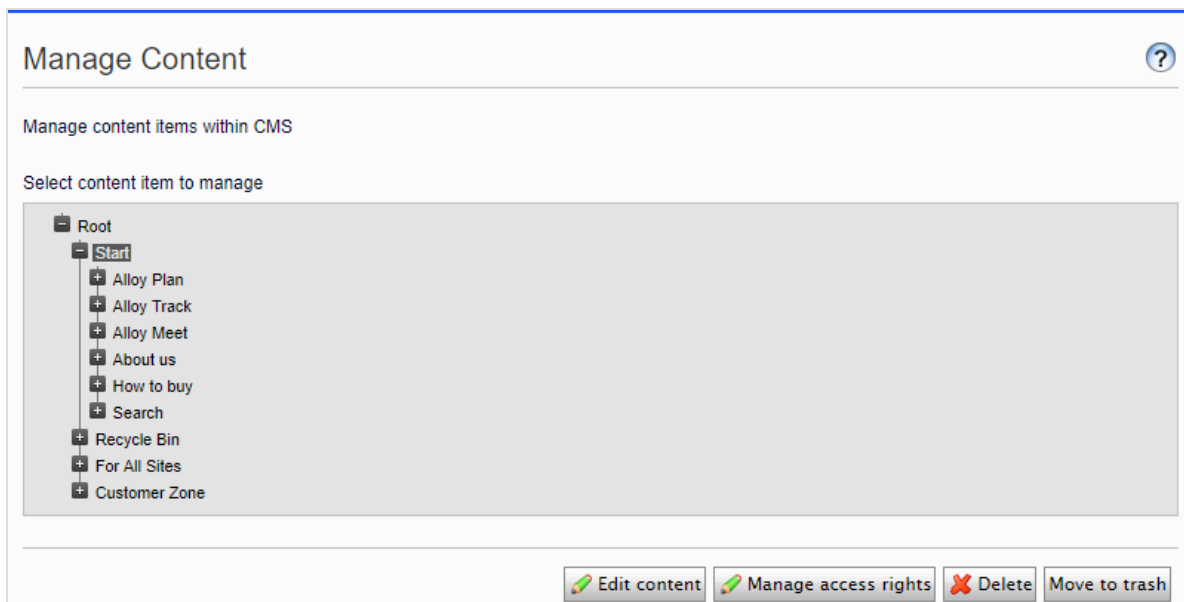
5. If your export package contains multiple language versions, select **All** if you want to import all language versions or one specific language to import only that language version.
6. Click **Begin Import**.

# Managing custom content types

The edit view in Optimizely 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.



# 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

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

| Field name              | Description  |
|-------------------------|--|
| <b>Change date from</b> | Select a date and a time to view only items that were changed after this time. |



| Field name                       | Description   |
|----------------------------------|---|
| Change date to                   | Select a date and a time to view only items that were changed before this time.   |
| Category                         | <p>From the <b>Category</b> drop-down list, you can select an activity type:</p> <ul style="list-style-type: none"> <li>• <b>Content</b> to display changed content items. This option displays items such as pages, blocks and media.</li> <li>• <b>Message</b> to display changed messages. (Messages are a type of activity in the projects feature.)</li> <li>• <b>Project</b> to display changes that are associated with a project.</li> <li>• <b>Approval</b> to display changes that are associated with a content approval sequence.</li> </ul> <p>If you do not select an option from the drop-down list, you will see changes to all types of activities.</p> <p><b>Note:</b> 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 <b>Delete</b>, <b>Publish</b> and <b>Rejected</b>.</p> <p><b>Note:</b> Website developers can configure which actions are available.</p>  |
| Changed by                       | To filter for a specific user, enter the Optimizely CMS user name.  |
| Maximum number of items per page | Limits the displayed number of items on the page. Click the <b>Previous</b> and <b>Next</b> arrows to browse through the list of items.   |

| Field name                        | Description   |
|-----------------------------------|---|
| <b>Start with sequence number</b> | 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 Optimizely 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

Encrypt the connectionStrings.config file

Enable globalization

Detect language via browser's language preference

Disable deletion of content versions

Save
Cancel

| Setting                                 | Description  |
|---|--|
| <b>Error handling in Optimizely CMS</b> | Select how you want errors to be handled; active for all visitors, remote visitors, or disabled.   |
| <b>Handler for subscription updates</b> | The subscription function in Optimizely 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. |

| Setting  | Description  |
|--|--|
| <b>Encrypt the connectionStrings.config file</b>         | Select to encrypt the <b>connectionStrings.config</b> file, which contains sensitive information sent to and from the database.  |
| <b>Enable globalization</b>                              | Select to activate management of content in multiple languages (globalization).  |
| <b>Detect language via browser's language preference</b> | Select to activate languages to be shown based upon the visitor's browser settings.  |
| <b>Disable deletion of content versions</b>              | 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 <b>Maximum number of versions</b> field on the <b>Editing</b> 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   |
|---|---|
| <b>Path to CSS file for the rich-text</b> | 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 sim- |

| Setting                             | Description  |
|-------------------------------------|--|
| <b>editor</b>                       | <p>ilar CSS file as the site uses for styling content so that the editors get the same appearance as the site when editing content.</p>  |
| <b>Maximum number of versions</b>   | <p>Specify the number of previously-published versions of content items (for example, pages or blocks) that are stored. The setting is per language, and currently-published version and draft versions are not counted.</p> <p>Default value is 20 versions. The scheduled job <a href="#">Trim content versions</a> 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 <b>Unlimited versions</b> or <b>Disable deletion of content versions</b> box is selected.</p>  |
| <b>Unlimited versions</b>           | <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 <b>Maximum number of versions</b> field is ignored.</p>   |
| <b>Auto publish media on upload</b> | <p>Select to automatically publish and index media when uploaded to the website.</p> <p><b>Note:</b> 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 <a href="#">proper access rights set in the media folder structure</a>.</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> |

| Setting | Description  |
|---------|--|
|         | 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. |

# Managing websites

You can easily add and remove websites from an Optimizely 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  | <a href="http://examplesite.com/">http://examplesite.com/</a>                               |
| Campaign site | <a href="http://summercampaign.examplesite.com/">http://summercampaign.examplesite.com/</a> |

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  |
|--------------|--|
| <b>Name</b>  | Type a name that identifies the website, such as <i>Example Site</i> .   |
| <b>URL</b>   | Enter the URL for the site, such as <i>https://examplesite.com</i> .<br>If your CMS or Optimizely Commerce site is using Unicode char- |



| Site setting                    | Description  |
|---------------------------------|--|
|                                 | acters in the URL segments, internationalized domain names should be registered in Punycode format. See also: <a href="#">Internationalized Resource Identifiers (IRIs)</a> on Optimizely World.   |
| <b>Start page</b>               | Select the page to which the visitor is sent if only a host name is specified.   |
| <b>Use site-specific assets</b> | 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.  |
| <b>Host name</b>                | <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"> <li>• <b>Request routing.</b> When serving a request, the application evaluates the host list to see which site and language (culture) that should be served.</li> <li>• <b>Cross-site linking.</b> 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.</li> </ul> <p><b>Note:</b> A wildcard * mapping must be accompanied by an explicit host name to support cross-site link generation.</p> |
| <b>Culture</b>                  | Select the default language for when a visitor accesses the website  |

| Site setting | Description   |
|--------------|---|
|              | using the host name.  |
| Type         | <ul style="list-style-type: none"> <li>• <b>Primary host.</b> 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-redirection 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.</li> <li>• <b>Edit host.</b> 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.</li> <li>• <b>Redirection host.</b> 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-redirection host 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.</li> </ul> |
| 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:

The screenshot shows the 'Edit Website' interface. At the top, there is a title bar 'Edit Website' with a help icon. Below it, the text 'Settings associated with the site.' is displayed. A 'Settings' tab is active. The 'General' section contains the following fields: 'Name' with the value 'Campaign site', 'URL' with the value 'http://summercampaign.examplesite.com', and 'Start page' with the value 'Start [5]' and a dropdown arrow. There is also an unchecked checkbox for 'Use site-specific assets'. The 'Host Names' section contains a table with one row: 'summercampaign.examplesite.com'. The table has columns for 'Host Name', 'Culture', and 'Type'. Below the table is an 'Add' button with a plus sign. At the bottom right, there are three buttons: 'Delete Site' (with a red X icon), 'Save' (with a floppy disk icon), and 'Cancel' (with a blue X icon).

| Host Name                      | Culture | Type |
|--------------------------------|---------|------|
| summercampaign.examplesite.com |         |      |

# 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.

### 1. 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.

The screenshot shows a configuration window titled "français - fr" with a help icon in the top right. Below the title is the instruction: "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.gif".
- Web address prefix:** An empty text input field.
- Access level:** A dropdown menu showing "Everyone" with a checked checkbox and a "Change" link.
- Buttons:** "Add Users/Groups" (with a plus icon), "Delete" (with a red X icon), "Save" (with a floppy disk icon), and "Cancel" (with an X icon).

- 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)

- a. In the admin view, go to the **Config** tab > **System Configuration** > **Manage Website Languages**.
- b. Click the desired language in the list.



- c. Select the **Enabled** check box and click **Save**.

**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

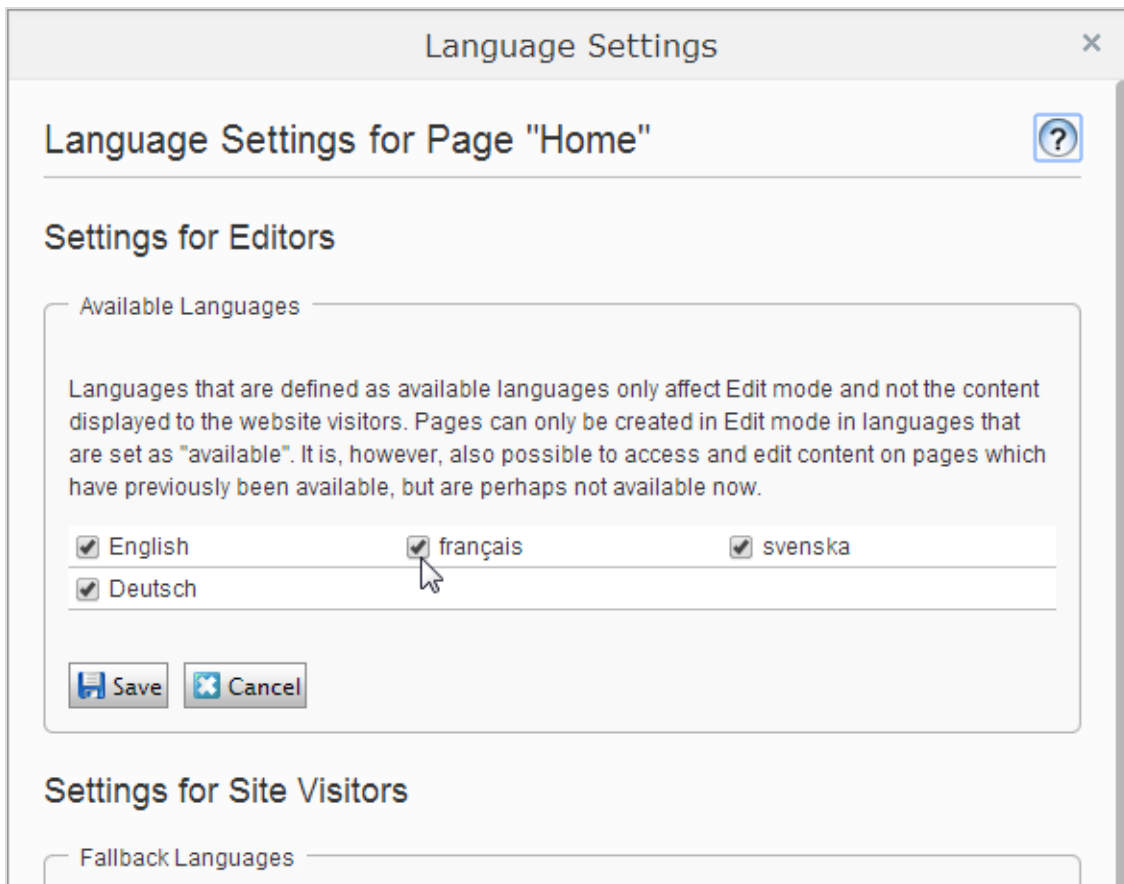
---

### 3. Enabling a language for editing in CMS

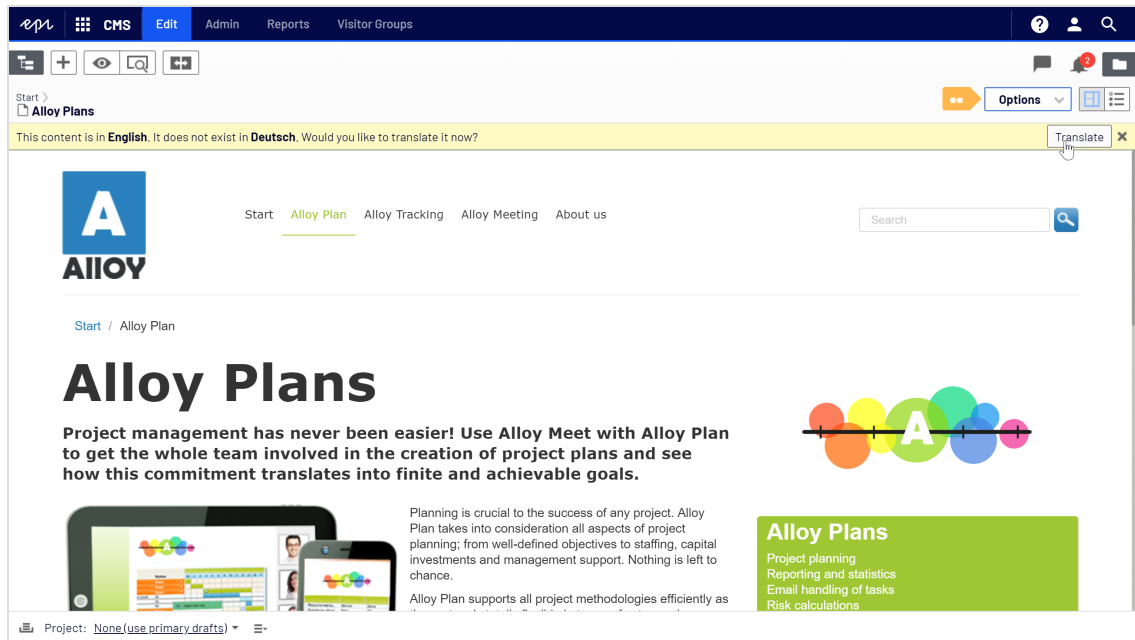
This step makes the language available for content creation by editors. A language can be made available for the entire site structure, or for parts of it. By default, subpages inherit language settings from their parent page.

- a. 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.
- b. Open the page in **All Properties** editing.
- c. Select **Tools** and **Language Settings** in the header.
- d. Under **Available Languages**, select **Change**.

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



- 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 Optimizely 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 Optimizely 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.

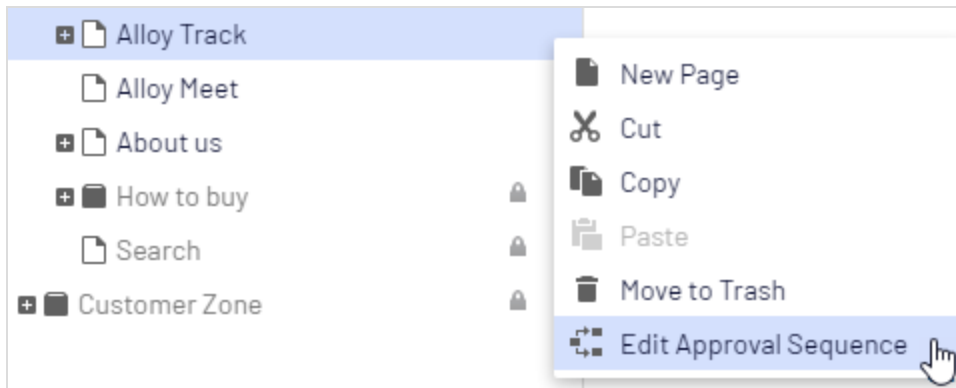
When an item or a change is in review, one or more appointed reviewers must approve it before the item can be published or the change is applied. The reviewers are defined by an administrator in **an approval sequence**.

## How it works

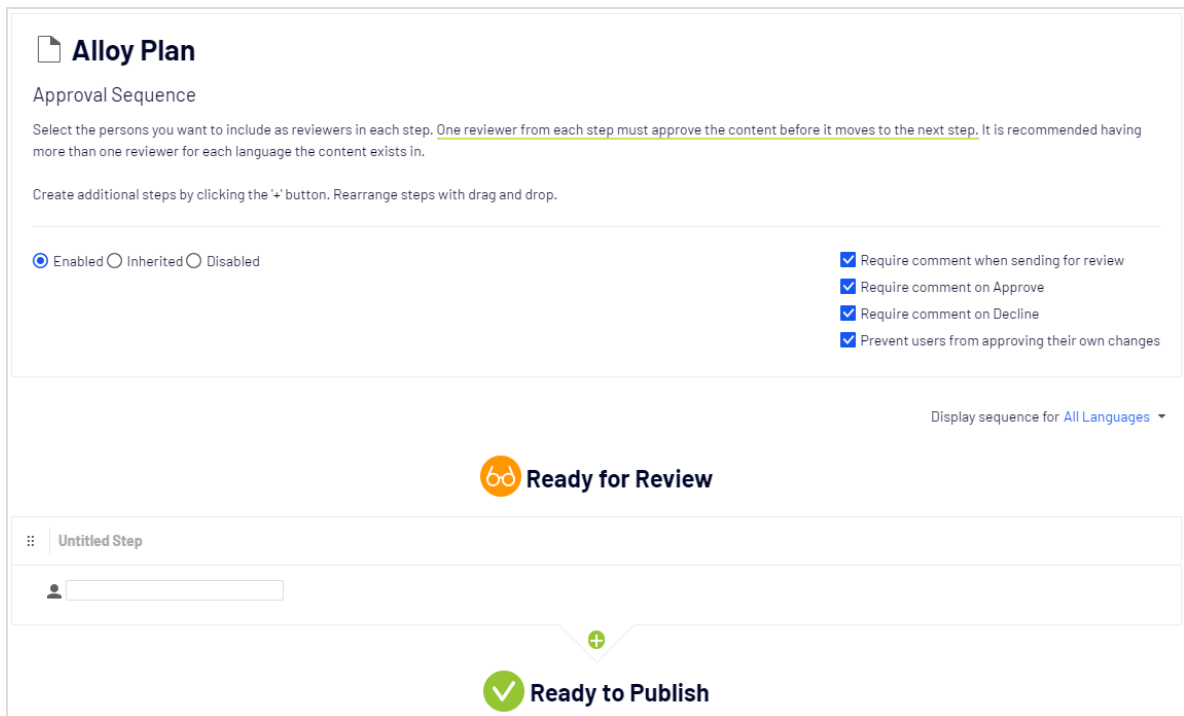
You define an approval sequence for a specific page in the page tree or for a global or site-specific assets folder in the assets pane. You can then choose to let the item's or folder's children inherit the approval sequence, create a new approval sequence for the children or disable approval sequences 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:



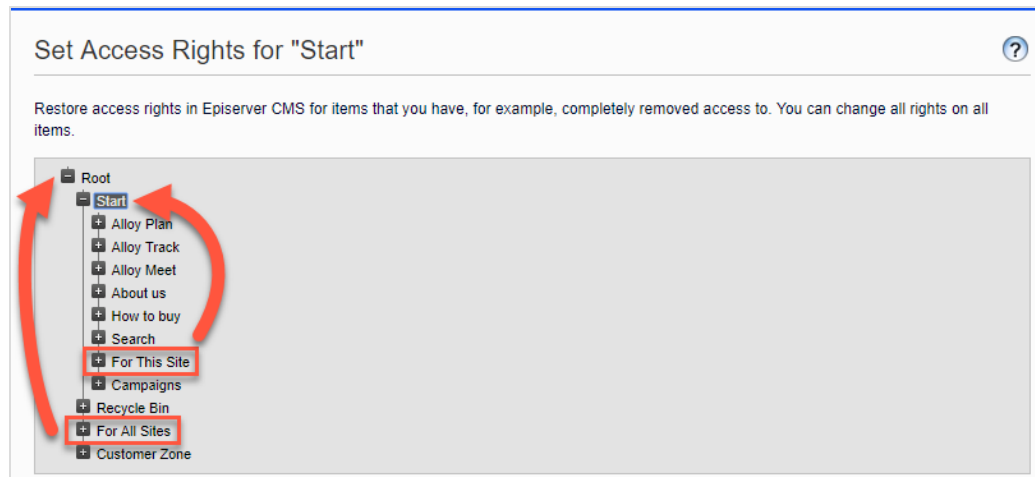
In the approval sequence overview, you define the number of approval steps (you can have as many as you like), and also the persons responsible for review and approval in each of the steps.



## Content approvals on assets

Each page in Optimizely can have its own approval sequence. Assets, such as blocks and media (and also forms and catalogs if you have Optimizely Forms and Optimizely 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 Optimizely Commerce catalog named *Bunnies*, it does not get the same content approval sequence as the *Bunnies* folders for blocks and media.

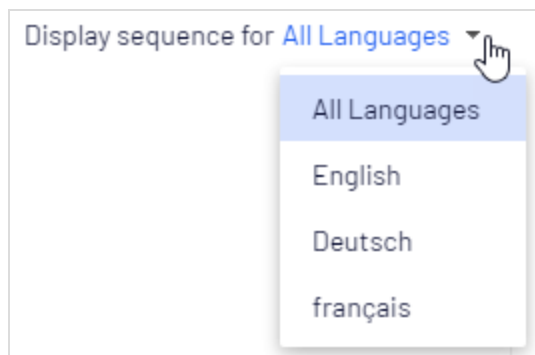
**Note:** Assets added to an assets folder with a approval sequence set are not auto published, even if the auto publish option is set (see [Auto publish media on upload](#)).

## 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

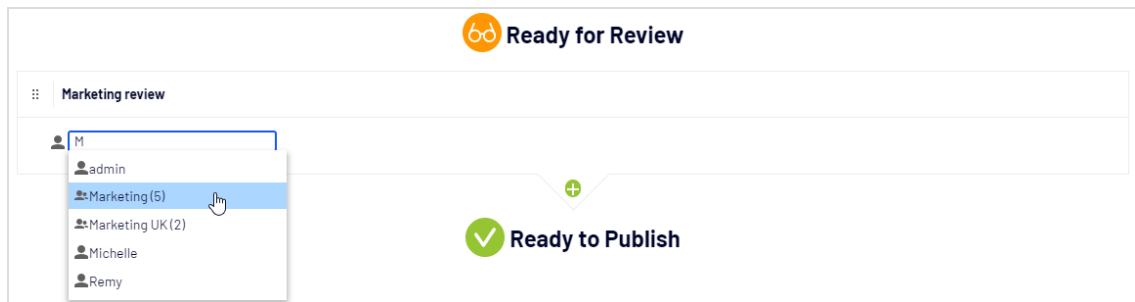
### Setting up an approval sequence (single language website)


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 [Optimizely 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.

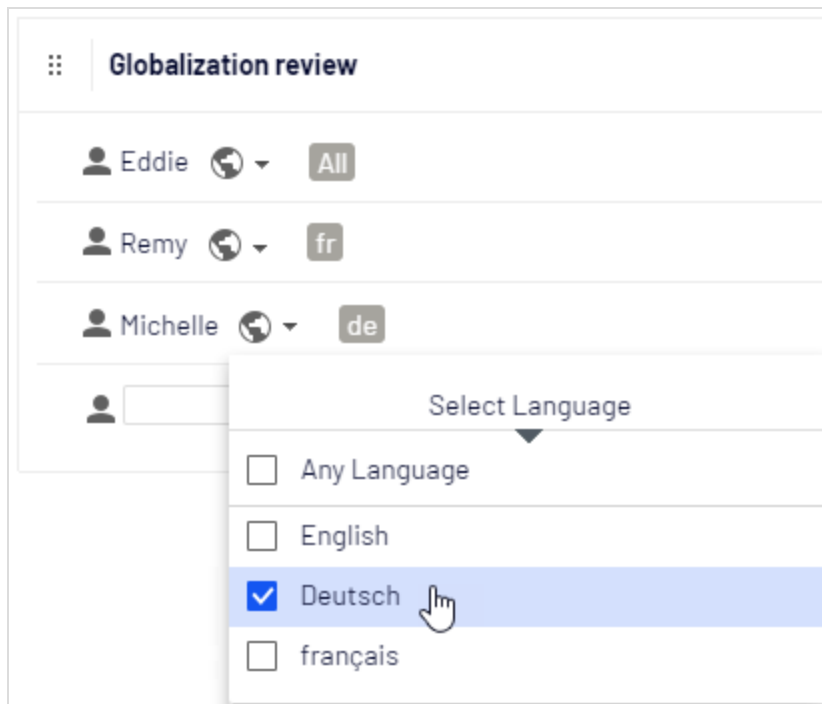
- **Inherited.** This setting locks the approval sequence for the current item and it gets whatever settings its parent has. If the parent item's approval sequence is changed, so is the approval sequence for the current item.
- **Disabled.** This setting disables the approval sequence for the item and 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.



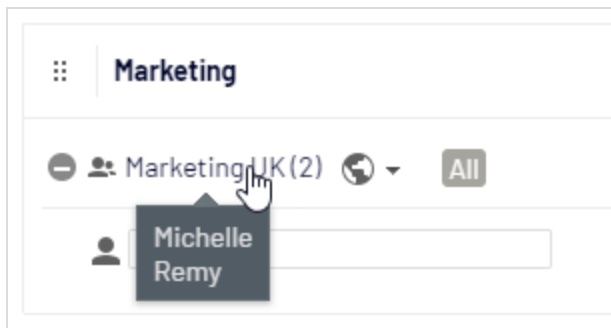
**Note:** There is a difference between selecting **Any language** and selecting all languages one by one. If you select Any language, the reviewer can approve an item in any language it exists in, which also includes any new languages you may add in the future. If you select all available languages 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.

- Optional: To require a review requester to enter a comment on the review request, select the **Require comment when sending for review** check box.
- 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).
- 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.
- Click **Save**.

## Editing an approval sequence

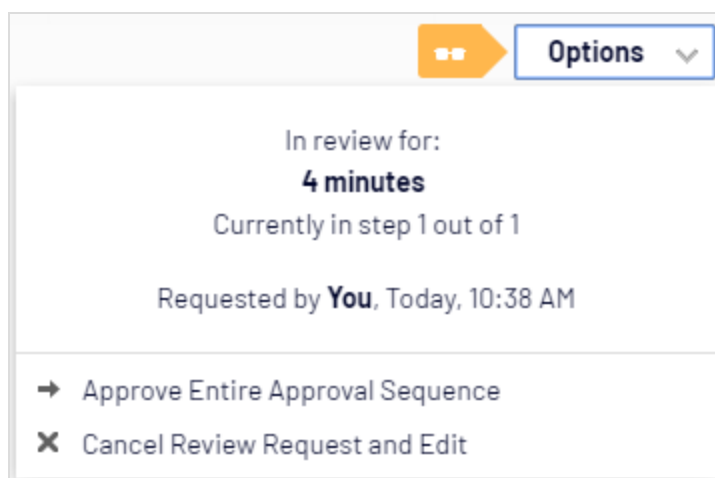
Open the approval sequence from the content item's context menu and make sure that the **Enabled** radio button is selected. Edit and save the approval sequence as described in [Setting up an approval sequence](#). You can rearrange the approval steps by drag and drop. Hover over a group name to see 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:   |
|---|---|
| <b>The user who sets the item to Ready for Review</b> | <ul style="list-style-type: none"> <li>a reviewer approves a review request.</li> <li>a reviewer declines a review request.</li> <li>an administrator force approves all steps in an approval sequence.</li> <li>the review request is canceled by an administrator.</li> </ul> |
| <b>Reviewer</b>                                       | <ul style="list-style-type: none"> <li>an item is ready to be reviewed by the user.</li> </ul>  |



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

## 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 [Optimizely 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 [Optimizely 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 Optimizely CMS Developer Guide on [Optimizely World](#).

# Creating categories

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

In Optimizely 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 Optimizely 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 Optimizely 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**.

Categories ?

Define the categories used by your website. These categories will be available in the editorial interface for each page under the heading "Categories".

+ Add

| Move Up | Move Down | Name  | Display Name | Visible                             | Selectable                          | Add                | Delete                | Edit                |
|---------|-----------|-------|--------------|-------------------------------------|-------------------------------------|--------------------|-----------------------|---------------------|
|         | ↓         | Meet  | Alloy Meet   | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <span>+ Add</span> | <span>✗ Delete</span> | <span>✎ Edit</span> |
| ↑       | ↓         | Plan  | Alloy Plan   | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <span>+ Add</span> | <span>✗ Delete</span> | <span>✎ Edit</span> |
| ↑       |           | Track | Alloy Track  | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <span>+ Add</span> | <span>✗ Delete</span> | <span>✎ Edit</span> |

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 defined 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 Optimizely. 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**.

For more information on how to work with access rights for users, groups, and content items, see [Access rights](#).

# Tool settings

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

## Plug-in Manager

Many functions in Optimizely 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.

### Plug-in Manager ?

The list below displays components that have been registered as plug-ins in EPiServer CMS.

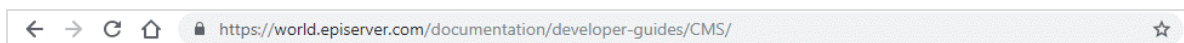
Plug-ins
Overview

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



## 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 Optimizely 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 Optimizely 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. Optimizely 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 Optimizely 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 [Optimizely 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"/>                                    |

## Creating a channel

To set up mirroring between two websites, create channels in the admin view. Channels define the mirroring jobs from one Optimizely 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   |
|------------------------|---|
| <b>Name</b>            | Type an unique name for the mirroring channel.  |
| <b>Parameters</b>      | <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>Episerv-er.Mirror-ingService.Mirror-ingTransferProtocol.WCF.MirroringTransferClient.TransferAction.</pre> <p>The TransferAction has two options <b>None</b> and <b>ForceCurrentVersion</b>. By default, the value is <b>None</b>, which creates a new version for each published page on the target site. The <b>ForceCurrentVersion</b> option does not create a new version for each published page. Instead, it updates the page on the target site.</p> |
| <b>Use default URI</b> | Select to use the URI defined in the configuration file ( <b>web.config</b> ) for the mirroring application. When you select this option, the <b>URI</b> field is disabled.   |
| <b>URI</b>             | <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>  |
| <b>Start page</b>      | Select the local root page on the source site to be mirrored.   |

| Setting                         | Description   |
|---------------------------------|---|
| <b>Root page on destination</b> | Select the page number on the target site where the pages are mirrored to.  |
| <b>Include start page</b>       | Sets whether the start page is mirrored or if only its children are mirrored.   |
| <b>Import as anonymous user</b> | Sets whether an anonymous user does the export and import of pages and files when the mirroring job is run.   |
| <b>Import content as user</b>   | Sets whether an identified user does the export and import of pages and files when the mirroring job is run.  |
| <b>Enable reporting</b>         | Select to enable reporting for the mirroring job through email. When you select this option, the <b>E-mail address</b> field becomes editable.  |
| <b>E-mail address</b>           | Enter the email address where the mirroring job report is sent.   |
| <b>Continue on Error</b>        | 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.                                      |
| <b>Enabled</b>                  | Select to enable the channel as active. If this option is not selected, nothing is mirrored for the channel.  |
| <b>Enable validation</b>        | 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 |

| Setting | Description   |
|---------|---|
|         | 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  |
|--------------------------------------|--|
| <b>Reset Channel</b>                 | 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 <b>Continue with Reset</b> .  |
| <b>Check System</b>                  | To validate the created channel, click <b>Check System</b> . The result appears under the <b>Messages</b> 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 <a href="#">Developer Guide</a> under <i>Deployment &gt; Mirroring &gt; Installing and Configuring mirroring</i> . |
| <b>Messages</b>                      | The result of a check system appears in the <b>Messages</b> tab. Click the arrow to view the result and other information regarding previous mirroring jobs that were run.   |
| <b>Monitoring</b>                    | The status of a mirroring job appears in the <b>Monitoring</b> tab.  |
| <b>Target Site Configuration</b>     | To use a site as a mirroring target, some configuration is required.   |
| <b>Mirror Pages to a Target Site</b> | 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  |

| Setting                           | Description  |
|-----------------------------------|--|
|                                   | needs to be installed and configuration needs to be implemented.   |
| <b>Mirroring in Other Formats</b> | Partners and customers can create mirroring in formats other than Optimizely CMS Import/Export format and plug them in using the provider model. |

## Configuring A/B testing

You can configure the default 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 statistically significant?

Confidence Level:

Enable A/B testing.

| Setting                         | Description  |
|---------------------------------|--|
| <b>Test Duration</b>            | Sets the default test duration in days. This can be changed in edit view when setting up an A/B test.  |
| <b>Participation Percentage</b> | 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.<br>If the participation percentage is set to 20, 20 % of the site visitors |

| Setting  | Description  |
|--|--|
|  | <p>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>                                    |
| <p><b>Automatically publish the winner of the test if the results are significant?</b></p> | <p>Set this to <b>True</b> 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 <b>False</b>.</p>   |
| <p><b>Confidence Level</b></p>   | <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> |
| <p><b>Enable A/B testing</b></p>   | <p>This setting lets you turn on and off the A/B testing feature for the entire site. A/B testing is enabled by default.</p> <p>If you deselect this check box, the <b>A/B Test Changes</b> option is no longer displayed on the <b>Publish</b> menu. Active tests (and scheduled tests at the scheduled time) will be set as running but no processing of these tests will be done. It is still possible to stop a test or pick a winner. The Enabled/Disabled configuration value is preserved and respected after updates and restarts of the web applic-</p>   |



| Setting | Description   |
|---------|---|
|         | <p>ation.</p> <p>When the feature has been disabled and is re-enabled, all active tests continue running.</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 Optimizely top 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 Optimizely Commerce installed.
- **Find files, blocks and pages** if you have Optimizely Search & Navigation 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 Optimizely 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 type="text" value="Use configuration settings"/>   |
| Default value        | <input checked="" type="radio"/> No default value<br><input type="radio"/> Inherits value<br><input type="radio"/> <input style="width: 100px;" 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 type="text" value="Content"/>                     |
| Sort index | <input type="text" value="310"/>                         |

Save
 Revert to Default
 Cancel

## 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   |
|----------------------------------|---|
| <b>Type</b>                      | 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.  |
| <b>Name</b>                      | Name the property. This is used when programming and making language settings.  |
| <b>Presentation control</b>      | Use of multiple editors is supported but the TinyMCE editor is used most often, and the <b>Presentation control</b> drop-down list appears dimmed. If your website is configured to allow multiple editors and you chose the property type <b>XHTML String (&gt;255)</b> , the <b>Presentation control</b> drop-down list is enabled, and you can select the XHTML editor to use. |
| <b>Default value</b>             | 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.  |
| <b>Value must be entered</b>     | 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.   |
| <b>Searchable property</b>       | 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.   |
| <b>Unique value per language</b> | Select whether the property is unique for a certain language. This is needed only if the website supports globalization.  |
| <b>Display in edit view</b>      | 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.   |
| <b>Field name</b>                | 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 <b>Tab</b> 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 | <input type="text" value="Use configuration settings"/>   |
| Default value        | <input checked="" type="radio"/> No default value<br><input type="radio"/> Inherits value<br><input 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 type="text" value="Content"/>                     |
| Sort index | <input type="text" value="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 want 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  |
|-----------------------|-----------------------|--|
| <b>Boolean</b>        | Selected/not selected | True or false.   |
| <b>Number</b>         | Integer               | An integer.  |
| <b>FloatNumber</b>    | Floating point number | Number with decimals, for example, 3.14.   |
| <b>PageType</b>       | Page Type             | Optimizely CMS page type defined in admin view.  |
| <b>PageReference</b>  | Page                  | Link to an Optimizely page in the current site.  |
| <b>Date</b>           | Date/Time             | Date and time.   |
| <b>String</b>         | String (<=255)        | Short text, fewer than 256 characters in length.   |
| <b>LongString</b>     | Long String (>255)    | Used for text that can exceed 255 characters in length, for example the main editor area in edit view. |
| <b>Category</b>       | Category selection    | List of categories.  |
| <b>LinkCollection</b> | 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 Optimizely can be page types and block types, folders, or media files such as images and documents. Content can also be products in a product catalog in Optimizely Commerce.

## Content types and properties

Page types 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 type or block type and its properties need to be mapped to corresponding rendering.

The content concept in Optimizely 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"/>                             |
|              | <input checked="" type="checkbox"/> 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.

 Video tutorial: [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   |
|---------------------|---|
| <b>Name</b>         | Enter the name of the page type.  |
| <b>Display name</b> | Enter the name to be displayed in the list of available page types.             |
| <b>Description</b>  | The text describing the page type, appears in the list of available page types. |
| <b>Sort index</b>   | Determines the sorting (ascending sort order) in the list of avail-             |

| Field                         | Description   |
|-------------------------------|---|
|                               | able page types in edit view; default is 100.   |
| <b>Available in edit view</b> | 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.  |
| <b>Display Template</b>       | <p>Select one of the following templates to be used for the page type:</p> <ul style="list-style-type: none"> <li>• <b>Web Form template path.</b> Enter a path to the aspx page template file that displays the content of the page.</li> <li>• <b>Web form template.</b> 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.</li> <li>• <b>MVC template.</b> 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.</li> </ul> |
| <b>Registered template</b>    | 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 pre-defined page templates to display the same content using different channels.   |
| <b>Advanced information</b>   | Displays information about the GUID globally unique identifier, class name and assembly name for the page type.   |
| <b>Access level</b>           | <p>Determines the users and user groups for which the page type is available when creating new pages. The default setting is <b>Everyone</b> (available to all users and groups). See <a href="#">Access rights</a></p> <p>Do the following to limit access rights for a page type:</p> <ol style="list-style-type: none"> <li>Clear the <b>Create</b> check box to remove <b>Everyone</b> from the</li> </ol>  |

| Field | Description  |
|-------|--|
|       | <p>access level setting.</p> <p>b. Click <b>Add users/Groups</b> and select the relevant users or groups.</p> <p>c. Make sure that the <b>Create</b> check box is selected for the desired users and groups.</p> |

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

You can set default values for some of the built-in properties in Optimizely 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

*Set "Start publish date" relative to when the page has been created*

Stop Publish Date

*Set "Stop publish date" relative to when the page has been created*

Display in navigation

Sort index

Sort subpages

Archive to  ...

Target Frame

| Property             | Description  |
|----------------------|--|
| <b>Start Publish</b> | Select the <b>Use adjusted default settings...</b> and the value in time |

| Property                     | Description  |
|------------------------------|--|
| <b>Date</b>                  | 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.  |
| <b>Stop Publish Date</b>     | Select the <b>Use adjusted default settings...</b> 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.                                 |
| <b>Display in navigation</b> | 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 <b>Display in navigation</b> property, which is then the default value for this page type. |
| <b>Sort index</b>            |  |
| <b>Sort sub-pages</b>        | Select how you want the pages to be sorted, according to creation date or other.   |
| <b>Archive to</b>            | 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 <a href="#">Scheduled jobs</a> .  |
| <b>Target frame</b>          | 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 choose the correct page type. For example, for a *News List* parent page, you can specify that the only available page type is *News Item*.

### Edit "Standard Page" ?

Edit the basic information about the page type.

Information | Default Values | **Available Page Types**

Use Default Settings  
 All  
 None  
 Selected

|                                     | 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 |

| Option                      | Description   |
|-----------------------------|---|
| <b>Use Default Settings</b> | Revert to default settings as defined in code for this page type. |
| <b>All</b>                  | Create pages based on all page types available in edit view.      |
| <b>None</b>                 | Cannot create child pages for this page type.                     |
| <b>Selected</b>             | 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   |
|--|--|
| <span style="border: 1px solid #ccc; padding: 2px;">Standard Page</span> ▼ | <span style="border: 1px solid #ccc; padding: 2px;">Contact</span> ▼ |

| Convert from Property | Convert to Property  |
|-----------------------|--|
| MetaTitle             | <span style="border: 1px solid #ccc; padding: 2px;">MetaTitle</span> ▼                   |
| PageImage             | <span style="border: 1px solid #ccc; padding: 2px;">PageImage</span> ▼                   |
| MetaKeywords          | <span style="border: 1px solid #ccc; padding: 2px;">MetaKeywords</span> ▼                |
| TeaserText            | <span style="border: 1px solid #ccc; padding: 2px;">TeaserText</span> ▼                  |
| HideSiteHeader        | <span style="border: 1px solid #ccc; padding: 2px;">HideSiteHeader</span> ▼              |
| MetaDescription       | <span style="border: 1px solid #ccc; padding: 2px;">MetaDescription</span> ▼             |
| HideSiteFooter        | <span style="border: 1px solid #ccc; padding: 2px;">HideSiteFooter</span> ▼              |
| MainBody              | <span style="border: 1px solid #ccc; padding: 2px;">Remove property permanently</span> ▼ |
| MainContentArea       | <span style="border: 1px solid #ccc; padding: 2px;">Remove property permanently</span> ▼ |
| DisableIndexing       | <span style="border: 1px solid #ccc; padding: 2px;">DisableIndexing</span> ▼             |

Convert
Test Conversion and Show Log

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 Optimizely 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**. Optimizely provides [a set of basic criteria](#) such as geographic location, number of visits, and referring search phrase. You can also develop customized criteria.

If you are using Optimizely Visitor Intelligence, you can use a segment as a criterion in a visitor group and then personalize your website specifically for visitors included in the segment. See [Creating a marketing segment in the Optimizely Visitor Intelligence section](#).

See [Working with visitor groups for personalization and segments in the Optimizely User Guide](#) for different user scenarios when working with visitor groups.

## Built-in visitor group criteria

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

| Visitor group criteria | Description   |
|------------------------|---|
| Site Criteria          | <ul style="list-style-type: none"> <li> <b>Number of Visits.</b> 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>.         </li> <li> <b>User Profile.</b> 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 <a href="#">Example: Site criteria and points example</a>.         </li> <li> <b>Visited Category.</b> 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         </li> </ul> |

| Visitor group criteria                | Description  |
|---------------------------------------|--|
|                                       | <p>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></p> <ul style="list-style-type: none"> <li>• <b>Visited Page.</b> Select one site page. The visitor must have visited that page during the current session.</li> </ul>  |
| <p><b>Time and Place Criteria</b></p> | <ul style="list-style-type: none"> <li>• <b>Time of Day.</b> 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></li> </ul> <p>Depending on your system configuration, you may also have:</p> <ul style="list-style-type: none"> <li>• <b>Geographic Coordinate.</b> Uses the visitor's approximate location in a geolocation database (based on visitor IP address). Drag the marker to the map (Google maps), and select a radius around that point to indicate the visitor's proximity to the location. See <a href="#">Example: Geographic coordinate</a>.</li> <li>• <b>Geographic Location.</b> 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, <b>Country N*</b> in Europe yields Netherlands and Norway. See <a href="#">Example: Geographic location</a>.</li> </ul> <p>For more information on how Geographic coordinate and Geographic location are manually enabled, see <a href="#">Enabling a Geolocation provider</a> in <a href="#">Configuring personalization</a> on Optimizely World.</p> |
| <p><b>URL Criteria</b></p>            | <ul style="list-style-type: none"> <li>• <b>Landing URL.</b> 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</i>, <i>www.exampleURL.com</i> and so on.</li> <li>• <b>Referrer.</b> 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 <a href="#">Example: Referrer</a>.</li> </ul>   |

| Visitor group criteria   | Description  |
|--|--|
|  | <ul style="list-style-type: none"> <li>• <b>Search Keyword.</b> 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.</li> </ul> <p><b>Note:</b> This criterion is not compatible with Google due to privacy restrictions for Google searches.</p>   |
| <p><b>Visitor Groups</b></p>   | <p><b>Visitor Group Membership.</b> 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>  |
| <p><b>Optimizely Forms</b> (Optimizely Forms is an add-on and must be installed separately.)</p> | <ul style="list-style-type: none"> <li>• <b>Submitted Form.</b> 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 <a href="#">Example: Form and form values</a>.</li> <li>• <b>Submitted Form Value.</b> Matches when a visitor submit a particular form value. See <a href="#">Example: Form and form values</a>.</li> </ul> <p><b>Note:</b> The Optimizely Forms Samples package must be installed for the forms visitor group criteria to work. See Optimizely 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 appro-

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**.

The screenshot shows the 'Create Visitor Group' form in the CMS. The top navigation bar includes 'epr', 'CMS', 'Edit', 'Admin', 'Reports', and 'Visitor Groups'. The main heading is 'Create Visitor Group'. Below the heading is a sub-heading: 'Adapt content on your website by first creating visitor groups and then using the groups to target the content on pages.' The form is divided into three main sections:

- Criteria:** This section contains a 'Match' dropdown menu set to 'All'. Below it is a dashed box labeled 'Drop new criterion here'. A criterion has been added: 'User Profile' with a dropdown for 'Title', an operator of 'Equals', and a text input field containing 'CTO'.
- Other Information:** This section includes a 'Name' field with the value 'VIP' and a 'Notes' text area with the value 'Preferred customer'. There are two checkboxes: 'Make this visitor group available when setting access rights for pages and files' (unchecked) and 'Enable statistics for this visitor group' (checked).
- Marketing Connector Criteria:** This section on the right lists several criteria: 'Number of Visits', 'User Profile', 'Visited Category', and 'Visited Page'.

At the bottom of the form, there are 'Save' and 'Cancel' buttons.

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 website is worth.
  - b. Drag the criteria from the pane on the right and drop it into the **Drop new criterion here** area.

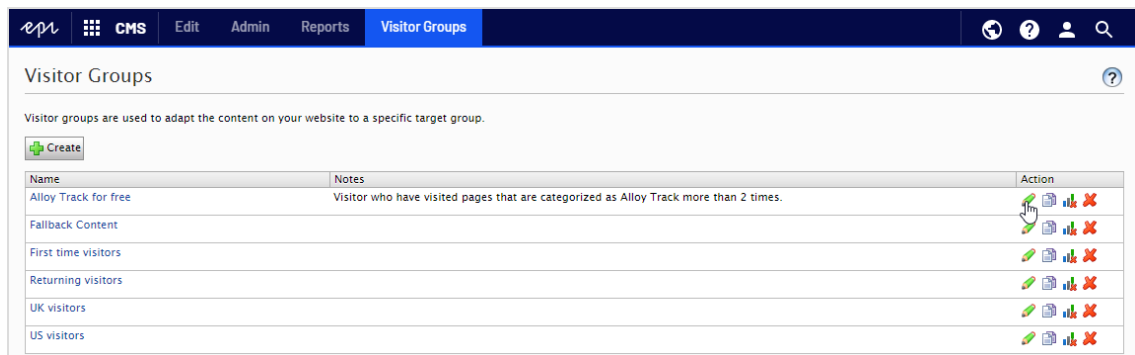
4. Make the settings for the criteria, see examples described in [Examples of creating visitor groups](#).
5. In **Name**, name the visitor group you are creating. This name appears in the personalized content box when you select the content on a page.
6. In **Notes**, type a descriptive text about the 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.

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

## Editing a visitor group

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



2. Click **Edit** for the visitor group you want to change.
3. Add a new criterion for the visitor group by dragging and dropping, change the value for an existing criterion, or click  to delete an existing criterion.
4. 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

1. From the top menu, select **CMS > Visitor Groups**.
2. 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*.
3. Rename and change criteria for the new visitor group you have copied.

## Deleting a visitor group

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


## Using a visitor group to personalize content


When you have created a visitor group, you can use it to personalize content, target a discount, create Optimizely Visitor Intelligence segments etc. See Using visitor groups in the Personalization section.

## 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 clearing action.

**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](#)
- [Geographic location](#)
- [Geographic coordinate](#)
- [Referrer](#)
- [Form and form values](#)

### Site criteria and points

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



1. In the **Match** drop-down list, select the criteria to match **Point**.
2. Drag and drop the **Visited Page** criterion, and select page. 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]**.)

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 Optimizely 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.

The screenshot shows a configuration panel for the 'Geographic Location' criteria. On the left is a dark button labeled 'Geographic Location'. To its right are three dropdown menus: 'Continent: Europe', 'Country: Sweden', and 'Region: Any'. Further right is a time selection field with '2' in a box and 'p' to its right. Below the time field is a checkbox labeled 'Required'. On the far right is a close button with an 'x' icon.

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 Optimizely 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 *optimizely and cms* on Google.com
  - from the search result page, click the Optimizely 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=optimizely+cms>.

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

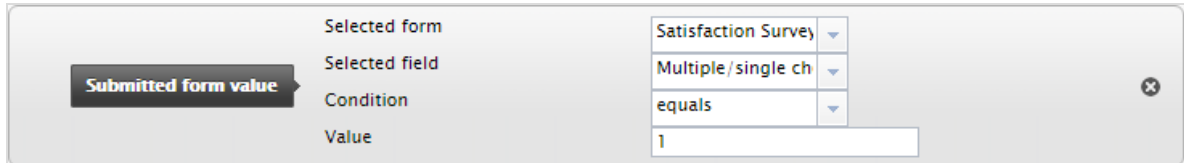
## Form and form values

**Note:** Optimizely Forms and the Optimizely 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:

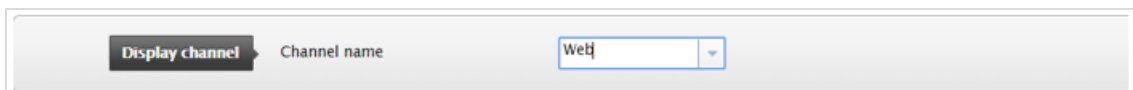
### Optimizely Commerce criteria

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

### Optimizely Visitor Group Criteria Pack

Optimizely 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:

The screenshot shows a configuration box for 'IP Range'. On the left, there is a dark button labeled 'IP Range'. To its right, the text 'Condition' is above a dropdown menu showing '=', and 'IP (v4)' is above a text input field containing '203.162.177.154'.

- **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.

The screenshot shows a configuration box for 'IP Range'. On the left, there is a dark button labeled 'IP Range'. To its right, the text 'Condition' is above a dropdown menu showing '>=', and 'IP (v4)' is above a text input field containing '2.255.247.0'.

- **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.

The screenshot shows a configuration box for 'OS & Browser'. On the left, there is a dark button labeled 'OS & Browser'. To its right, the text 'Operating System' is above a dropdown menu showing 'Android', and 'Browser or User-Agent' is above a dropdown menu showing 'Contains' and a text input field containing '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.

|             |           |             |
|-------------|-----------|-------------|
| <b>Role</b> | Condition | In role     |
|             | Role Name | WebAdmins   |
| <b>Role</b> | 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.

|                          |                   |         |
|--------------------------|-------------------|---------|
| <b>Selected Language</b> | Condition         | Is      |
|                          | Selected Language | English |
| <b>Selected Language</b> | 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:

|                        |      |                               |
|------------------------|------|-------------------------------|
| <b>Downloaded file</b> | 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.

Time Zone: UTC+07:00

From:  
Date: 3/1/2018 Time: 9:15 AM

To:  
Date: 3/31/2018 Time: 11:15 AM

## Optimizely Marketing Automation

Visitor group criteria specifically designed for marketing automation.



# Index

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|  |                                |                             |
|--|--------------------------------|-----------------------------|
| <b>A</b>                                   | archive function,<br>job 52    | community member<br>role 14 |
| A/B Testing                                | assets                         | configuration               |
| configuration 111                          | remove unrelated<br>content 56 | A/B Testing 111             |
| access rights                              | <b>B</b>                       | content                     |
| administer 29                              | BLOBs                          | editor role 15              |
| change 28                                  | abandoned,<br>remove job 55    | publishing                  |
| create 28                                  | block types 134                | delayed job 55              |
| delete 29                                  | blocks                         | types 125                   |
| languages 44                               | maximum<br>number 69           | versions                    |
| overview 28                                | <b>C</b>                       | deleting                    |
| publish 29                                 | categories                     | disabling 68                |
| read 28                                    | adding 98                      | maximum num-<br>ber 69      |
| setting                                    | deleting 99                    | content approvals           |
| from permissions<br>for func-<br>tions 102 | editing 99                     | deleting 84                 |
| visitor groups 41                          | overview 98                    | editing 84                  |
| administration                             | change log 64                  | setting up 84               |
| view 26                                    | auto truncate<br>job 52        | CSS file                    |
| administrators                             | channels                       | rich-text editor            |
| role 16                                    | creating 107                   | path to 68                  |
| approval sequences                         |                                | customer role 14            |
| managing 84                                |                                |                             |

| D   | L                                 | N                                  |
|---|-----------------------------------|------------------------------------|
| developer role 16                         | languages                         | notifications                      |
| <b>E</b>                                  | access rights 44                  | dispatcher, scheduled job 54       |
| editing                                   | adding 78                         | truncate message, scheduled job 55 |
| tab, system settings 68                   | deleting 83                       | <b>P</b>                           |
| encrypt, connectionstrings.config file 68 | editing 78                        | page types                         |
| error handler, system settings 67         | enabling 78                       | converting 135                     |
| exporting                                 | overview 77                       | overview 127                       |
| CMS data 58                               | licenses available per website 72 | pages                              |
| <b>F</b>                                  | login 23                          | converting to another type 135     |
| frames, overview 100                      | <b>M</b>                          | maximum number 69                  |
| <b>G</b>                                  | Manage Content tool 63            | permissions                        |
| general tab, system settings 67           | marketer role 15                  | see access rights 28               |
| globalization                             | media, auto publish on upload 69  | personalization                    |
| enabling 68                               | menu, top 24                      | overview 138                       |
| <b>I</b>                                  | merchandiser role 16              | plug-in manager 104                |
| importing                                 | mirroring                         | properties                         |
| CMS data 60                               | creating a channel 107            | adding 116                         |
| <b>J</b>                                  | overview 106                      | builtin 114                        |
| jobs, scheduled, CMS 51                   | service job 54                    | custom settings 118                |
|   | multi-site 71                     |                                    |

- 
- custom types, creating 122
  - custom, configuring 122
  - editing 115
  - language specific 118
  - organizing 120
  - overview 114
  - types 114
  - user-defined 114
- R**
- rebuild name for web addresses 105
  - recipient
    - role 14
  - rich-text editor
    - path to CSS file 68
  - roles 14
    - administrator 16
    - community member 14
    - content editor 15
    - developer 16
    - marketer 15
    - merchandiser 16
  - recipient 14
    - visitor, customer 14
    - website owner 15
- S**
- scheduled jobs
    - A/B test 54
    - archive function 52
    - change log auto truncate 52
    - clear thumbnail properties 53
    - fetch data from MAI connector 53
    - link validation 53
    - marketing test monitor 54
    - mirroring service 54
    - monitored tasks auto truncate 54
    - notification dispatcher 54
    - notification message truncate 55
    - overview 51
    - publish delayed content 55
  - remove abandoned BLOBs 55
  - remove permanent editing 55
  - remove unrelated content assets 56
  - running manually 51
  - setting up automatic intervals 51
  - subscriptions 56
  - trash, empty 52
  - trim content versions 56
  - search configuration 113
  - subscriptions
    - job 56
    - updates handler, system settings 67
  - system settings 67
    - auto publish media on upload 69
    - disable deletion of content versions 68
  - editing tab 68

|  |   |                               |
|--|---|-------------------------------|
| enable globalization 68                  | schedule 52                                     | visitor groups                |
| encrypt connectionstrings.config file 68 | trim content versions                           | access rights 41              |
| error handler 67                         | job 56  | copying 143                   |
| general tab 67                           | <b>U</b>  | creating 141                  |
| globalization                            | user groups                                     | criteria, built-in 138        |
| enable 68                                | creating in CMS 49                              | deleting 143                  |
| handler for subscription updates 67      | deleting in CMS 49                              | editing 142                   |
| maximum number of stored versions 69     | displaying members 47                           | examples 144                  |
| path to CSS file for rich-text editor 68 | overview 44                                     | overview 138                  |
| unlimited versions 69                    | users   | statistics                    |
| <b>T</b>                                 | creating 45                                     | clearing 143                  |
| tabs                                     | deleting 45                                     | visitor role 14               |
| overview 100                             | editing 45                                      | <b>W</b>                      |
| thumbnail properties, clear, job 53      | overview 44                                     | web address, rebuild name 105 |
| tool settings 104                        | <b>V</b>  | websites                      |
| top menu 24                              | video   | adding 72                     |
| trash                                    | Making a page type available for some users 129 | available licenses 72         |
| emptying on a                            | Managing access rights 28                       | domain mapping 72             |
|  | Visitor Group Criteria Pack                     | managing 71                   |
|  | add-on 148                                      | multi-site setup 71           |
|  |   | owner role 15                 |
|  |   | requirements 72               |
|  |   | single-site setup 71          |

---

unique URL 72



# Optimizely Digital Experience Platform

The Optimizely Digital Experience Platform 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

## About Optimizely

At Optimizely, we're on a mission to help people unlock their digital potential. We equip teams with the tools and insights they need to experiment in new and novel ways. Now, companies can operate with data-driven confidence to create hyper-personalized experiences. Building sophisticated solutions has never been simpler. Learn how we unleash new limits at [optimizely.com](https://www.optimizely.com).

[www.optimizely.com](https://www.optimizely.com)