



Optimizely CMS

Editor User Guide



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Optimizely CMS Editor User Guide

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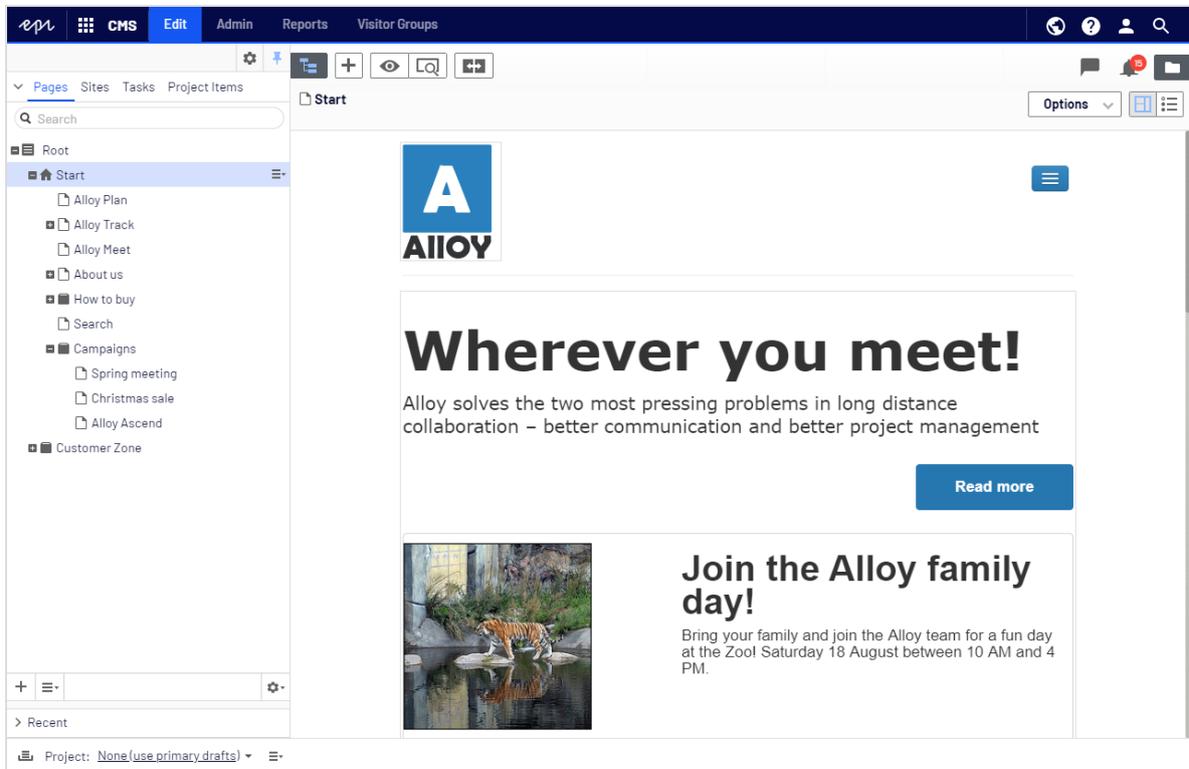
Introduction

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 activation.



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.

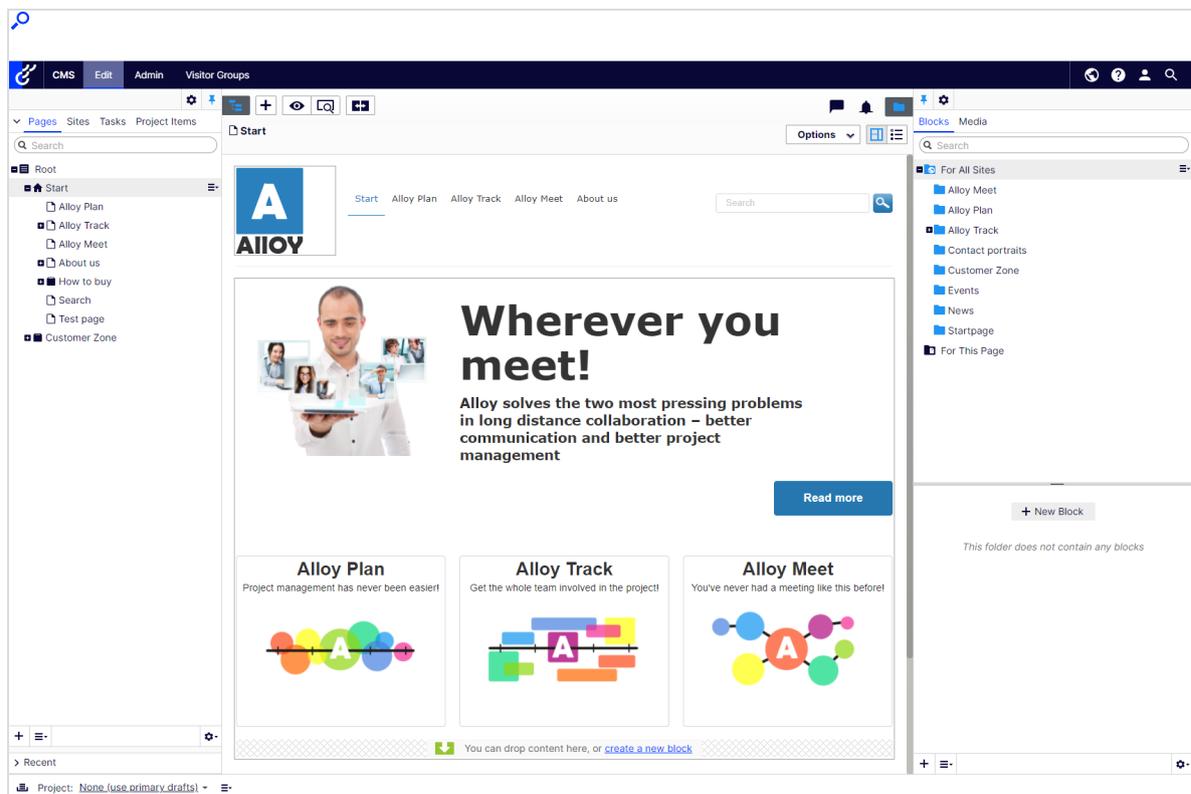
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Optimizely CMS

Optimizely CMS provides powerful web content management capabilities, available through an intuitive user interface, allowing both experienced and occasional users to work efficiently with content.



Content management features

Optimizely CMS provides powerful web content management capabilities, available through an intuitive user interface, allowing both experienced and occasional users to work efficiently with content.

- [Creating pages and content blocks](#)
- [Adding images](#)

- [Linking content](#)
- [Content collaboration](#)
- [Managing content versions](#)
- [Content approvals](#)
- [Working with multi-language content](#)
- Managing permissions in the Optimizely CMS Admin user guide

Note: The [Optimizely Digital Experience Platform](#) contains many features to support you in your daily work. Depending on how your solution is set up, some features described in this documentation may not be available to you. Contact your system administrator to find out more. See [Optimizely World](#) for technical information.

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**¹, 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

¹When a website visitor takes a desired action. This desired action can be, for example, buying an item, filling in a form, or clicking a link.

to follow-up on content with unusually high or low **conversion rates**¹ to update or delete this content.

Marketer

A *marketer* creates **omnichannel**² **campaigns**³ and content with targeted banner advertisements to ensure that customers get a consistent on-site experience. The marketer also monitors campaign **KPI**⁴s (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**⁵ 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**⁶, 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

¹Number of conversions divided by the number of views of an item.

²Multiple channel marketing (on website, mobile, retail store, and so on) that provides an integrated experience for buyers.

³Commerce: a set of related components and activities used for promotions. A campaign organizes marketing activity and is associated with discounts (promotions), customer segments, and markets.

⁴Stands for "key performance indicator" (also known as a conversion goal); the measurement of actions on web pages. The actions can be completed purchases, pages visited, time spent on site and so on.

⁵Adapt content to customized target groups for a more personalized website experience, such as displaying different content to first time and returning visitors. (See visitor groups.)

⁶A landing page is the target page on which a visitor "lands" after clicking a banner or link. Usually, a landing page is a web page that is separate from the main page, with the goal that the visitor performs a certain action (conversion).

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 2022-03-14. 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 2022

Released	Area	Features and updates
2021-10-21	Campaign	You can now create webhooks for the <i>spam complaint</i> event.
2021-10-15	Campaign	The new topic, Setting up the List-Help header, has been added.
2021-09-30	Campaign	As part of the rebranding, the images and attachments feature was redesigned. It is now complete and includes the option to delete created images and attachments. (update 379) When creating or editing users, you can now specify allowed IP addresses and IP ranges

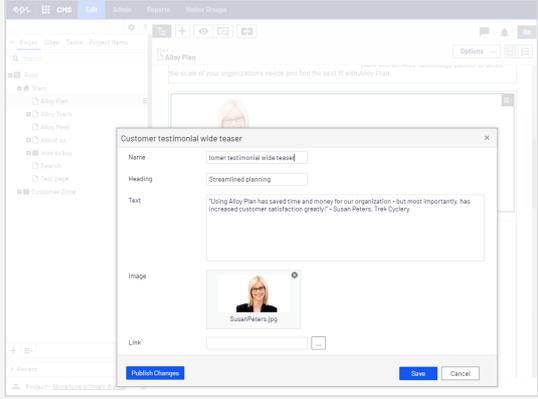
Released	Area	Features and updates
		to restrict access to the user account. See Managing users. (update 379)
2021-09-28	CMS	The Reports view is no longer supported and is removed. (update 378)
2021-09-28	CMS	The admin view is redesigned. (update 378)
2021-09-28	CMS	Visitor groups user interface is redesigned. Criteria previously included in the add-on Visitor Group Criteria Pack are now included in Optimizely CMS by default, see Built-in visitor group criteria. (update 378)
2021-09-28	CMS	The dashboard is no longer supported and is removed. Gadgets are now only installed in the navigation or assets panes. (update 378)
2021-09-28	Commerce	The Commerce Manager administration system is removed, and replaced with a new Administration view, from where you can define markets and warehouses, index catalogs, configure taxes, shipping, and payments, and work with dictionary properties. (update 378)
2021-09-28	Commerce	A new Customers view replaces the legacy Customer Management in Commerce Manager. (update 378)
2021-09-28	Commerce	Some functionality, previously managed from Commerce Manager, is now managed through code: <ul style="list-style-type: none"> • Dictionaries. Adding currencies, countries, and return reasons. • Dictionaries. Adding values for organizations and contacts.

Released	Area	Features and updates
		<ul style="list-style-type: none"> Catalog batch updates and catalog import/export. Management of business objects, and catalog and meta-classes fields. <p>See Optimizely World for technical details, and previous versions of the user guide for the removed legacy functionality. (update 378)</p>
2021-09-23	Campaign	<p>Mailings Classic and Reports will be deactivated on 2022-03-01. To migrate your mailings to Smart Campaigns, see Mailings Classic. To migrate your reports to the Performance Dashboard and Deep Analytics, see Reports. (update 377)</p> <p>The current Apple operating system versions include the Apple Mail Privacy Protection, which restricts the transmission of tracking information to Optimizely Campaign. See Apple Mail Privacy Protection.</p>
2021-09-09	Campaign	<p>You can now merge mailing content from different campaigns into a new campaign. See Merge content. (update 377)</p>
2021-09-02	Campaign	<p>When importing recipients, you can now merge the contents of recipient list fields of type "String" and "Text". You can either append or prepend the content or replace the old content with the new one. (update 376)</p>
2021-08-12	Marketing automation connectors	<p>The configuration settings screen of the Microsoft Dynamics CRM connector was updated.</p>
2021-08-02	Campaign	<p>The redesigned user interface has been released. Optimizely Campaign screenshots in the user guide have been updated. See Start</p>

Released	Area	Features and updates
		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.
2021-07-20	Campaign	You can now create webhooks for the <i>unsubscribe</i> event. (update 373)
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. (update 371)
2021-06-17	Campaign	See Deliverability basics for information about the BIMl email authentication standard.
2021-06-14	B2B Commerce	Spire roles documented.
2021-06-09	B2B Commerce	Adyen payment gateway plug-in documented.
2021-05-27	Marketing automation connectors	Fields were added to the Acoustic (Silverpop) Connector setting screen to include database lists. (update 368)
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. (update 366)
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 pur-

Released	Area	Features and updates
		chased within the last 30 days.
2021-04-22	Campaign	<p>You can now create webhooks for the <i>bounce</i> event. (update 364)</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. (update 362)</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. (update 362)</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. (update 360)
2021-03-25	Campaign	In the Optimizely Campaign start menu under Scheduled jobs, you can find an overview of

Released	Area	Features and updates
		<p>the scheduled jobs configured in your client. (update 360)</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. (update 355)</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. (update 352)</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. (update 350)</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 (update 349).</p>
2021-01-21	Personalization	<ul style="list-style-type: none"> • Create reusable email templates • Export CSV data in localized format for the selected language • Users (with authorization) can change the currency selection
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.

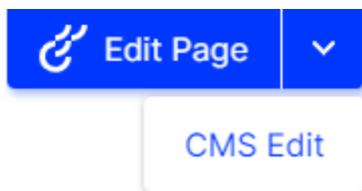
Logging in

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.



Navigation

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

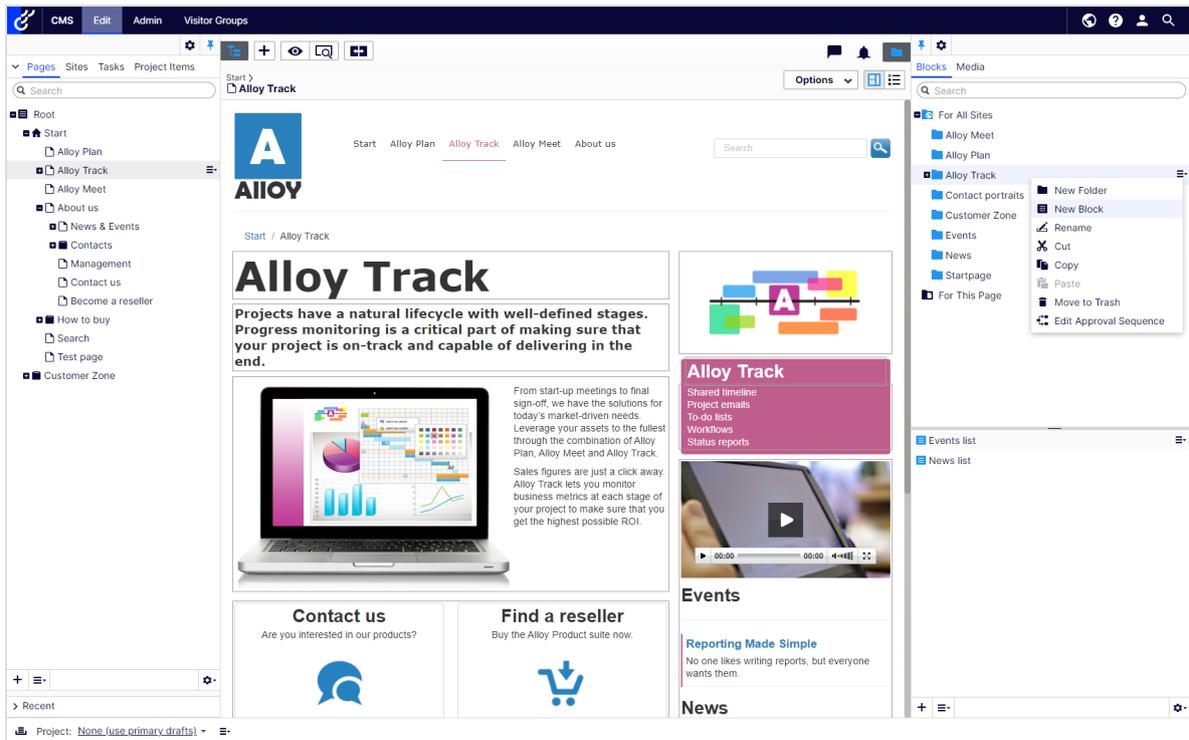


Next steps

- 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.

User interface

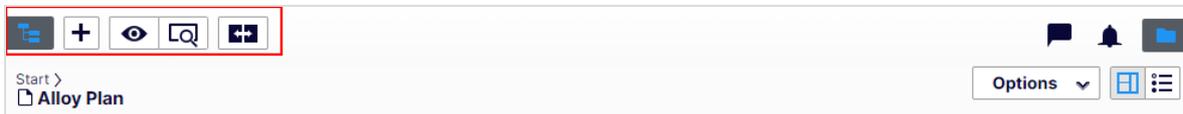
The **toolbar** and the **panes** in the Optimizely edit view provide easy access to functions when working with content. When entering the edit view, you have the top menu and the toolbar at the top, and adjustable panes to the left and right.



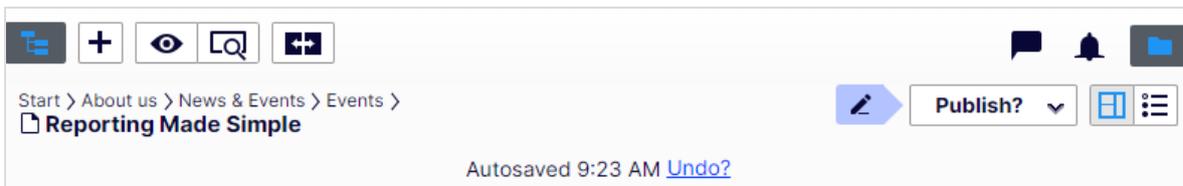
Note: The Optimizely user interface is flexible allowing developers to plug-in customized features when implementing websites. This description refers to Optimizely CMS without further customizations.



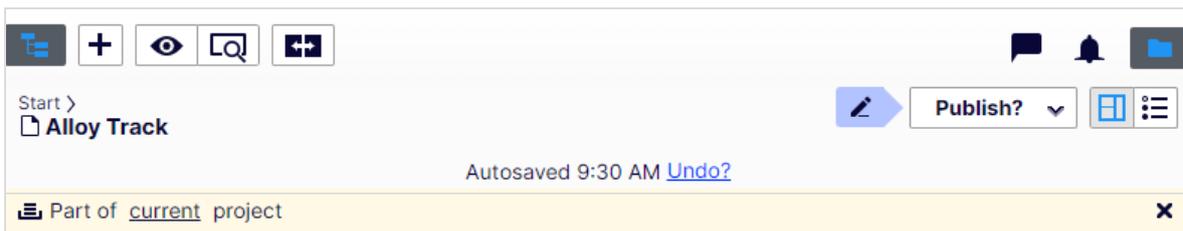
The toolbar contains features like preview and view options, and lets you add items such as pages or blocks.



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



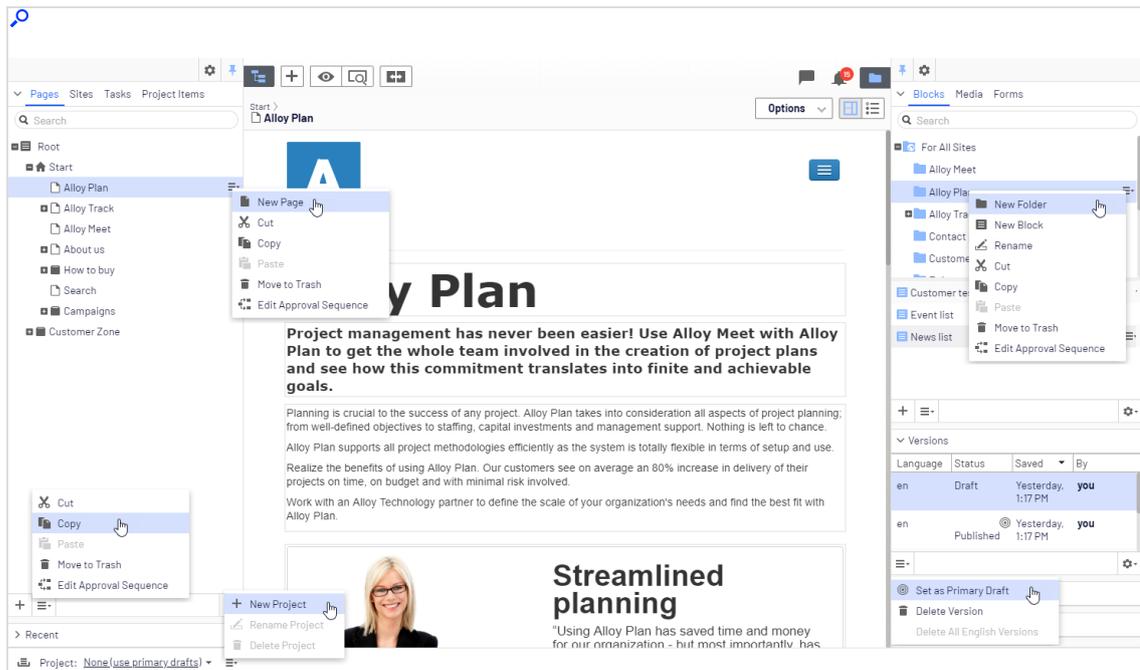
A notification toolbar may be displayed below the toolbar showing information, confirmation, error messages and so on.



General features

- **Context-sensitive actions.** Some features are only available in certain context. The toolbar (for example) presents relevant actions depending on what you are currently doing, and the add (+) button also offers context-sensitive options.
- **Primary actions.** Some actions open in a new window, for example, a page delete confirmation. The background is then dimmed, meaning that you must finish the primary action to continue.
- **Action feedback and notifications.** Successful actions are confirmed by a message in the notification bar. A notification may also appear in case of an error requiring you to take action.

- **Drag-and-drop operations.** Drag and drop is supported in many areas. For example, you can drag pages, media files and blocks into the rich-text area or content areas, or rearrange the page tree structure using drag-and-drop.
- **Tooltips.** Hover over a button or field and a short tooltip appears.
- **Keyboard commands.** Standard keyboard commands are supported in many areas, such as when you move pages in the page tree or in the rich-text editor.
- **Search.** Supported in many areas to locate, such as pages in the page tree or media in the folder structure.
- **Adaptable work environment.** Resize and pin the panes depending on what you are currently doing, and add and remove gadgets of your choice for quick access to functionality.
- **Support for time zones.** Publishing actions in the edit view are done in your local time zone, whereas administrative actions are based on server time.
- **Context menus** are available in many areas, such as in the panes, the page tree and in item listings. The menu displays different available options depending on where in the interface you are and what you are doing.



Panes

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



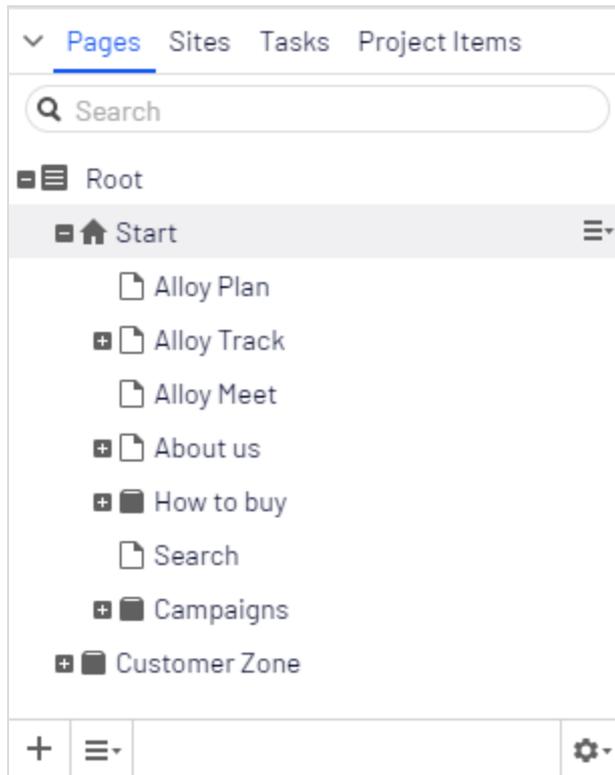
Pane pin is used for expanding and locking the panes in an open position.



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

Left-hand navigation pane

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

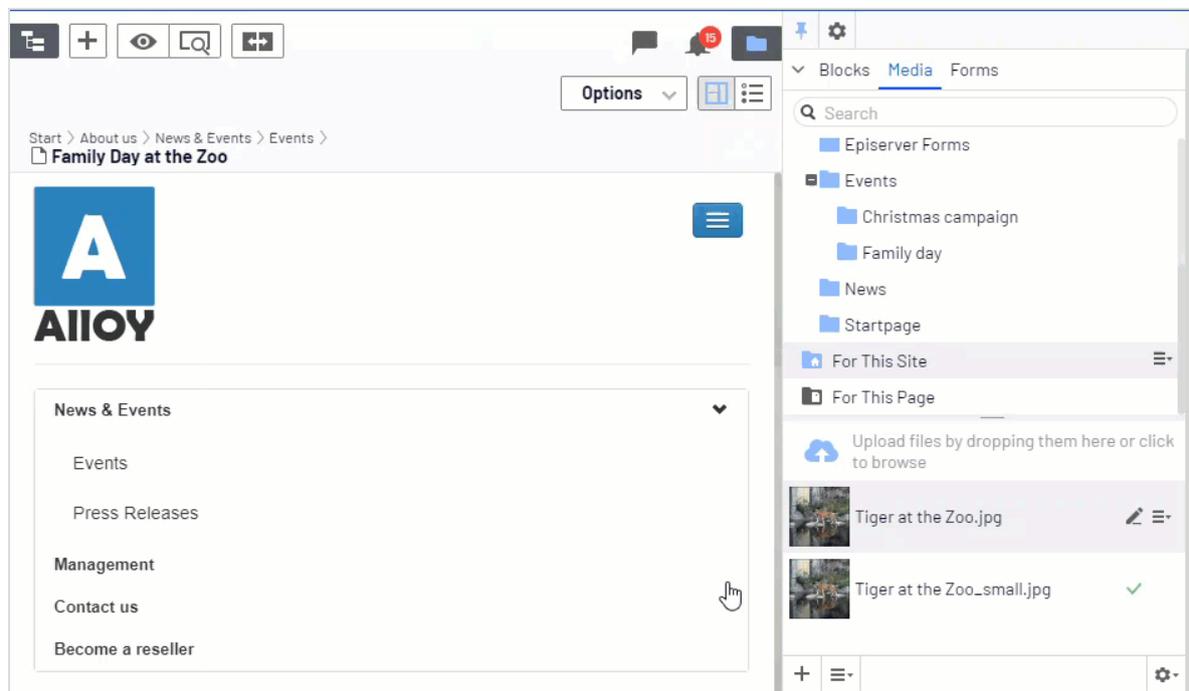


Right-hand assets pane

Contains the Media and Blocks folder structures by default. Drag and drop one or multiple items from the assets pane into the content you are currently working on.

You can also drag and drop multiple items within the assets pane, and delete, cut or copy and paste them, from the context menu or with standard keyboard shortcuts. Any unselected children folders are also moved, copied or deleted.

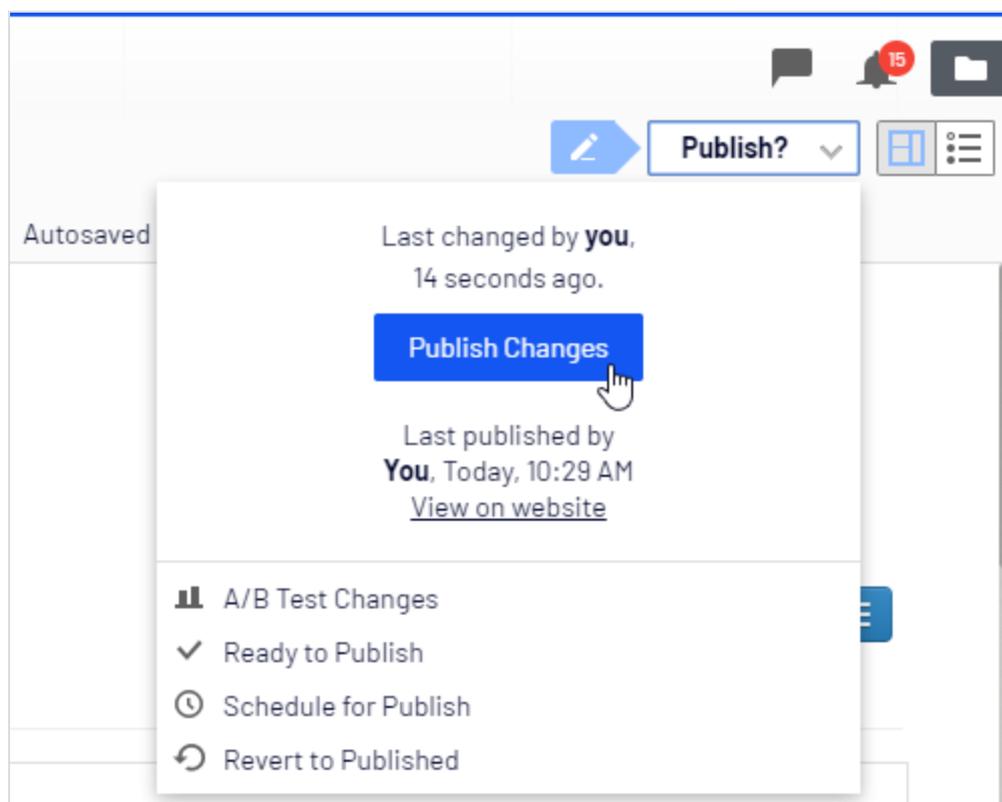
Note: If you copy and paste multiple folders on different levels, they will be on the same level when pasted.



If you have Optimizely Commerce or Optimizely Forms installed, the assets pane also displays the Catalogs and Forms gadgets per default.

Editing

The toolbar on top displays an actions menu with context-sensitive publishing options which vary depending on content status and user access rights. During editing, content status and autosave information are displayed.



When working with content such as pages and blocks in CMS, or catalog content in Optimizely Commerce, there are two editing views, **On-Page Editing** and **All Properties**, with buttons to switch between them.

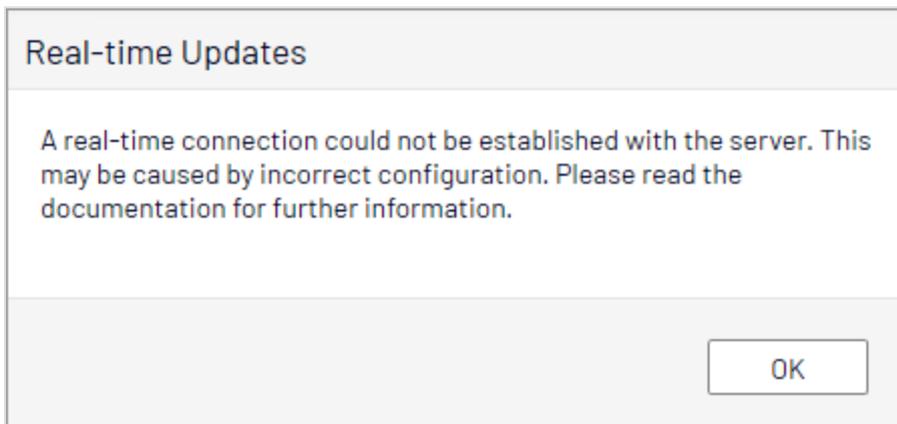
-  On-Page Editing view provides quick access to direct editing of a selection of content properties.
-  All Properties view provides access to all available properties including more advanced ones such as access rights and language settings.

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

-  Click to select (a category, for example).
-  Click to select (an image in a media folder, or a page in the page tree).
-  Click to remove (a category, for example).

Real-time Updates

Optimizely is by default set up to display project comments and changes to projects in the user interface immediately. If Optimizely experiences problems with these immediate updates, the following dialog box appears.



The *Real-time Updates* dialog box can have two main reasons. It appears because Optimizely has encountered a network problem and cannot connect to the web server, or because your system does not have the WebSocket protocol enabled, which is used for the real-time updates of the user interface.

Network problems

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

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

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

WebSocket support

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

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

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

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

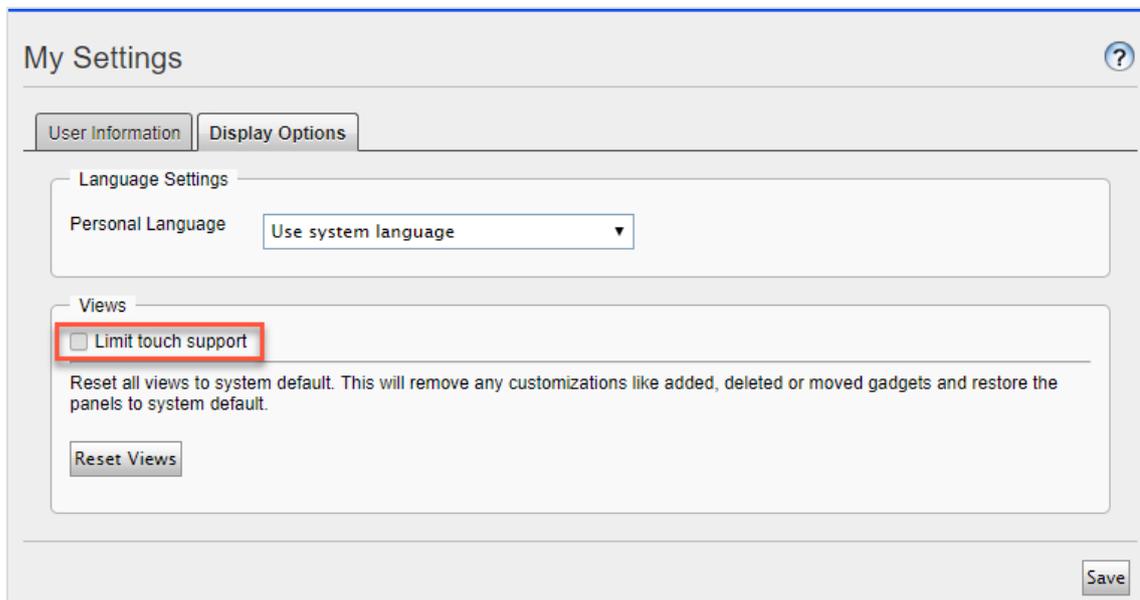
My settings

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

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

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

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

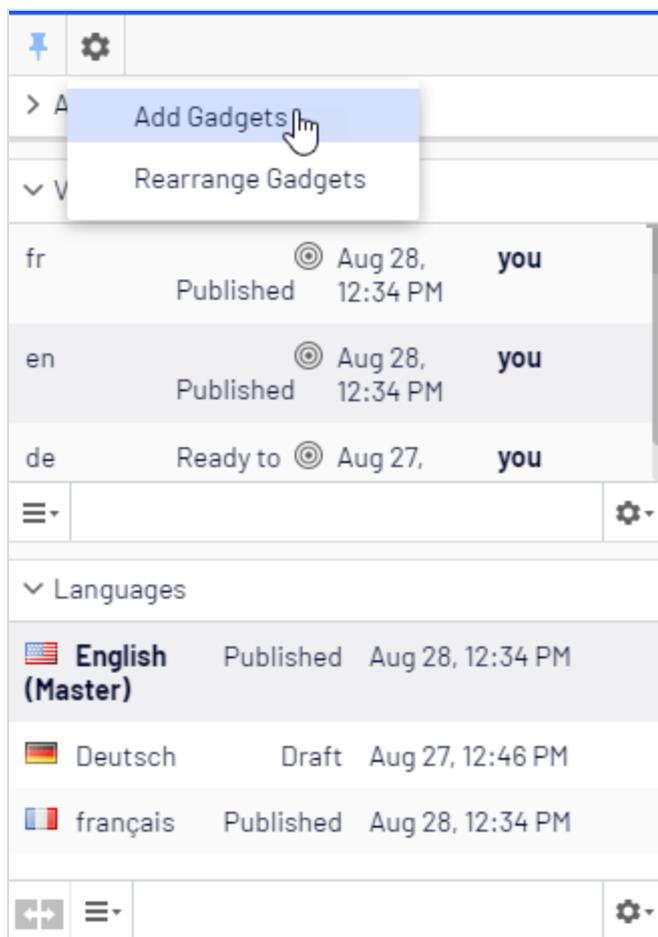


- **Reset all views to system default.** You can reset your user interface views to the settings. If you have changes to the user interfaces, such as added, moved or deleted gadgets, these changes are undone and the default views are displayed.

Add-ons

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

When they are installed on the website, you can add some of the add-ons as gadgets to the dashboard or to the [navigation](#) or [assets](#) panes in edit view.



Working in On-page editing view

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

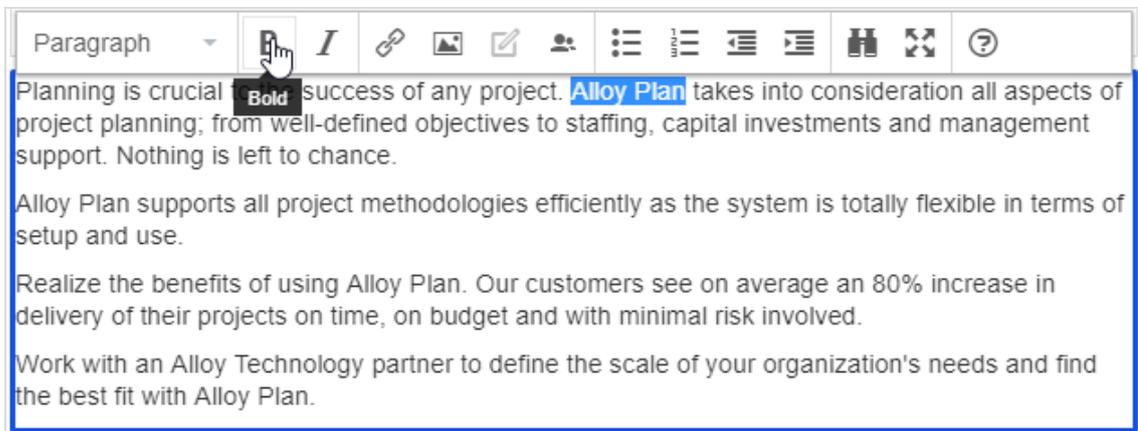
Note: Areas and properties available for editing are implementation-specific, and depend on the type of property and how the rendering is built on your website.

The screenshot shows the Alloy Meet website editor interface. The main content area is titled "Alloy Meet" and features a large image of a tablet displaying a whiteboard with various business terms like "Marketing", "SEO", "Technology", and "Business". To the right of the image is a text block describing the benefits of Alloy Meet. A "Large content area" dialog box is open, showing a list of content blocks including "Customer testimonial wide teaser", "Contact us", and "Find a reseller". The dialog box also includes a "create a new block" link. The page layout includes a navigation pane on the left, a top toolbar with icons for editing, and a footer with project information.

Example: Editing a page through on-page edit

This example describes how to edit a page, but the procedure is similar when editing [blocks](#) or catalog content if you have Optimizely Commerce installed.

1. Select the page to edit from the page tree in the navigation pane.
2. Click an area to edit (property names will be displayed on mouse-over).
3. Make your changes by updating the content properties as needed. See also: [Using the rich-text editor](#).



4. Your changes are automatically saved, and a draft version of the content (page, block and so on) is created.
5. At any time, you can access the [preview](#) option at the top to see what the published version will look like.
6. When done, publish the content or apply any of the other options described in [Publishing and managing versions](#).

Editing additional properties

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

Start > Alloy Meet

No changes to publish Options

Name Alloy Meet Visible to Everyone Manage

Name in URL alloy-meet Change Languages en

Simple address Change ID, Type 9, Product

Display in navigation Tools

Start Alloy Plan Alloy Track **Alloy Meet** About us t1

Search

Start / Alloy Meet

Alloy Meet

You've never had a meeting like this before! Participants from remote locations appear in your meeting room, around your table, or stand presenting at your white board.

Main body

Alloy meetings are easy to setup and moderate. All discussion points, presentations and whiteboard sketches are captured and stored in meeting notebooks. Action items are highlighted and e-mailed to the action owner.

Are your operations spread out across time zones and continents? What is the best way of leveraging this wide-ranging expertise? Alloy Meet helps companies save on skyrocketing travel costs.

Alloy Meet

- Online meeting
- distance cooperation
- project calendar
- white board
- online presentations

Project: None (use primary drafts)

Not all properties are available in the on-page editing view; to see all properties, switch to the [All properties editing view](#).

Working in All properties editing view

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

Start > Alloy Track

Options

Note: Areas and properties available for editing are implementation-specific, and depend on the type of content on your website. This topic describes some tabs and properties as they appear in the Optimizely sample templates.

Global properties

If you have content in multiple languages on your website, some properties may be locked for editing in a specific language. These properties are globally shared and you can edit them only in the **master language**¹. See [Translating content](#).

Basic info properties

The top gray area displays the basic informational properties which are also accessible in the on-page editing view. This area appears in the **All Properties** editing view.

Property	Description
Name	The name of the page. Depending on the implementation, this may be the heading of the page, and it is also shown in the page tree structure and menus.
Name in URL	<p>The page URL² is automatically created based on the name of the page and its place in the navigation. It depends on the implementation if this is visible in links on the website. If you copy a page, the URL of the original page is copied with a number added to it. Change this if you create new content based on existing page copies.</p> <p>Warning: Changing the URL for an existing page may cause broken links.</p>

¹The language in which the first version of content is created.

²Stands for "Uniform Resource Locator". Also known as a web address such as <http://world.optimizely.com>.

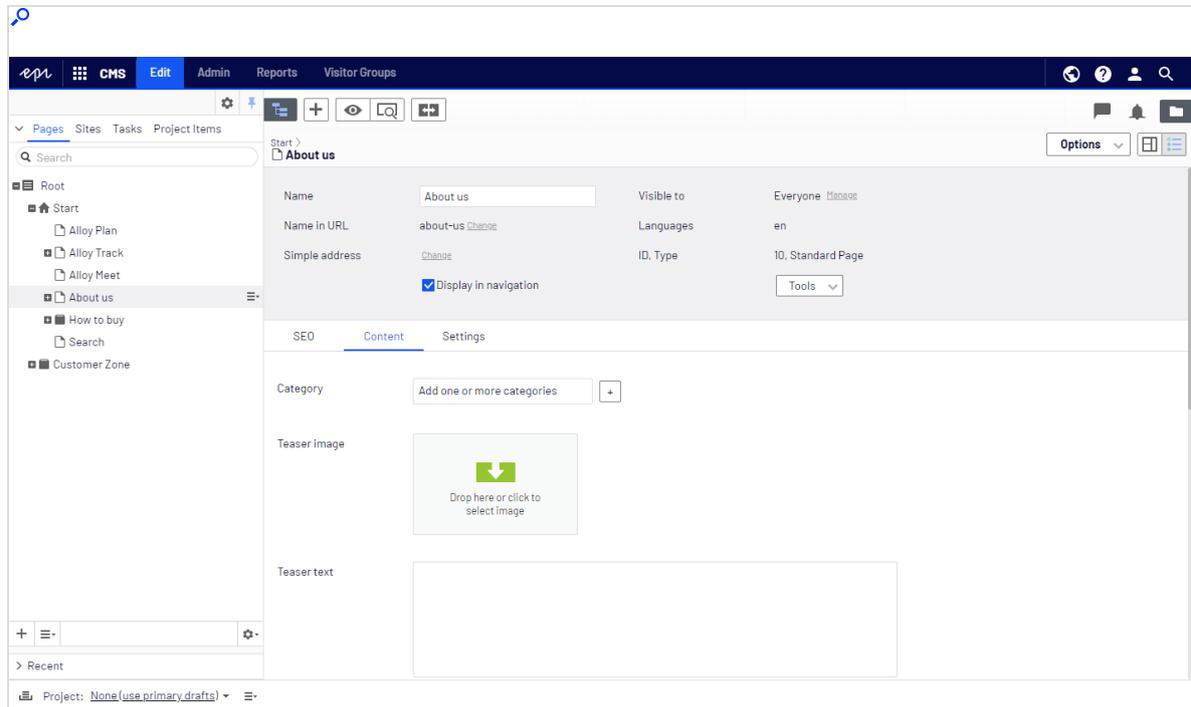
Property	Description
Simple address	This is a unique URL that can be added to frequently requested pages on your website, letting visitors locate the page simply by typing the simple address name directly after the main URL of the website. Providing, for example, <i>products</i> as a simple address lets you find the page just by entering the URL (for example, <i>https://www.company.com/products</i>) in the address bar of the browser even if the Products page is located further down in the navigation tree. You can use the Simple address report to manage simple addresses for your website.
Display in navigation	Deselect this option for pages that you do not want to be visible in navigation structures or menus on the website.
Visible to	Indicates if public access to the content is restricted. Click Manage to change these settings as described in Setting access rights from edit view .
Languages	Shows available languages for the content. If you have multiple languages on your website, see Working with multiple languages .
ID, Type	Shows the unique ID set by the system and the type of content on which the content is based.
Tools	Under tools, you find the following options: <ul style="list-style-type: none"> • Language Settings. Used to set fallback and replacement languages, see Fallback languages. • Manage Expiration and Archiving. Used to set published content as expired and for archiving content, see Setting expiration of content. • Permanently Mark as Being Edited. Used to notify editors that someone is working on the content item. See Working with shared content.

Tabs

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

Content tab

The **Content** tab contains properties for entering the main content, when editing a page or a block in CMS, or catalog content if you have Optimizely Commerce installed.



Property	Description
<p>Category</p>	<p>Categorization of content is useful in filtering functionality for search, navigation and listings. You create a category in the administrative interface before you can apply it to content in edit view.</p> <p>Note: A category is a built-in property in Optimizely CMS. You can apply a category to content, but your website also needs customized functionality to display the resulting outcome, such as in a filtering. Also, do not confuse content categories with Optimizely Commerce categories; see</p>

Property	Description
	 Creating a catalog entry.
Main body	Example of a rich-text editor property, for adding editorial content such as text, images and links. See Using the rich-text editor .

Settings tab

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

SEO	Content	Settings
Published	8/15/12, 9:56 PM	Change
Created	8/15/12, 9:56 PM	Change
Modified	✕ Aug 8, 3:57 PM	
	<input type="checkbox"/>	Update modified date
Sort subpages	According to sort index ▼	
Sort index	5 ▲▼	
Shortcut	No shortcut Manage	
	<input type="checkbox"/>	Hide site header
	<input type="checkbox"/>	Hide site footer

Property	Description
Published, Created and Modified	System-generated timestamps for the content that rarely need to be changed.
Update modified date	Select this check box if you have made significant changes to the content and want the system to update the modification date and include the content once more, such as in a subscription send-out.

Property	Description
Sort subpages and sort index	Defines the sort order for pages in the page tree structure and navigation menus. See Structuring the website .
Shortcut	<p>Creates menu or navigation links. A shortcut will not display any content of its own, instead it becomes a menu option linking directly to some other content on the same website or on an external website. Click Manage to add a shortcut for the page.</p> <div data-bbox="517 674 1380 1304" style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p>Manage Shortcut ×</p> <p>Start > Alloy Track</p> <p>Shortcut type No shortcut ▾</p> <div style="border: 1px solid #ccc; padding: 5px; margin: 5px 0;"> <p>No shortcut</p> <p style="background-color: #e0e0e0;">Shortcut to another content item ☞</p> <p>Shortcut to page on another website</p> <p>No shortcut, display text only</p> <p>Fetch content from another content item</p> </div> <p style="text-align: right;"> Save Cancel </p> </div> <p>The following shortcut types are available:</p> <ul style="list-style-type: none"> • No shortcut. Creates a link that displays the content you have created. By selecting this, you can also reset the page after using other types of links. • Shortcut to another content item. Links to another page on the same website. A visitor who clicks this link is transferred to the page you have linked to, and kept within the same navigation menu structure. • Shortcut to page on another website. Creates a link to an external page or to a document on the server. Include the entire URL address, including <i>https://</i>. • No shortcut, display text only. Creates a heading with no link in the menu, without displaying any information or link to another page.

Property	Description
	<ul style="list-style-type: none"> Fetch content from another content item. Creates a link to another page from which content is retrieved into the original page within the same navigation structure. Useful when re-using content on the website, in which case you only need to maintain it in one place. <p>Note: When you select Fetch content from another content item, you do not fetch the entire content of a content item. You only fetch content into empty properties. For example, if your source item has a "Page description" property that you want to reuse by using a shortcut, your target item must have a "Page description" property as well and it must be empty. If the target item's "Page description" property is not empty, the content is not overwritten; the source item keeps the old page description.</p>

From the administrative interface, you can customize and configure default values for selected properties, or to make certain properties mandatory for editors to fill in. See Properties in the CMS Administrator User Guide.

Optimizely Commerce-related content

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

Assets

Assets can be content of the type [media files](#), images, documents, [blocks](#) or products from the catalogs in Optimizely Commerce. Assets are available from the [assets pane](#) in both

CMS and Optimizely Commerce, making it easy to drag-and-drop items, such as images, blocks or products into a CMS page.

You can work directly with content from the assets pane, such as edit images or blocks, or create folders to organize content items. The context menu will provide different options depending on the type of assets selected. How to work with content items in the assets pane is described in the following topics:

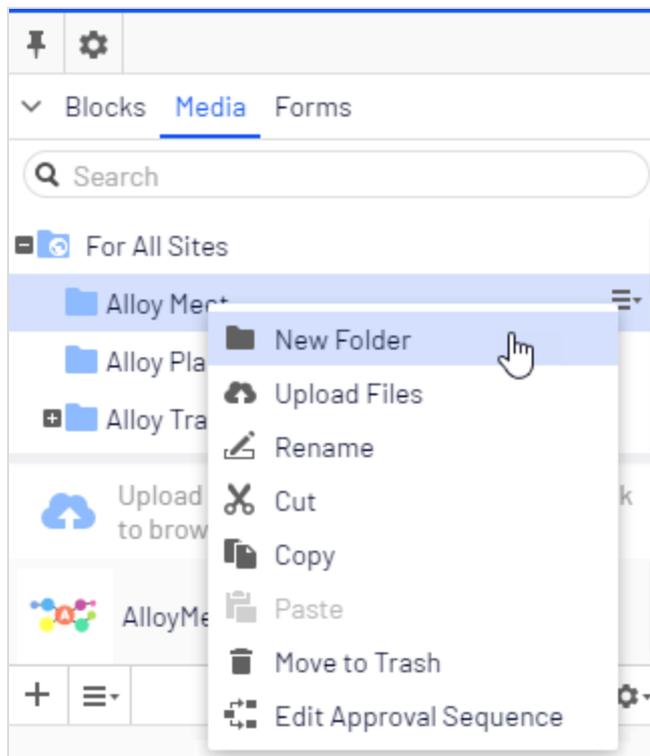
- [Folders](#)
- [Media \(images, videos, documents\)](#)
- [Blocks](#)
- Commerce catalogs in the Commerce User Guide

Tip: See [Best practices for organizing assets](#) for tips on where to store your assets and how to name them and so on.

Note: By default, the assets pane contains **Blocks** and **Media** with the addition of **Catalog entries** for Optimizely Commerce. Since the assets pane is a plug-in area, there might be other asset types available in your view.

Folders

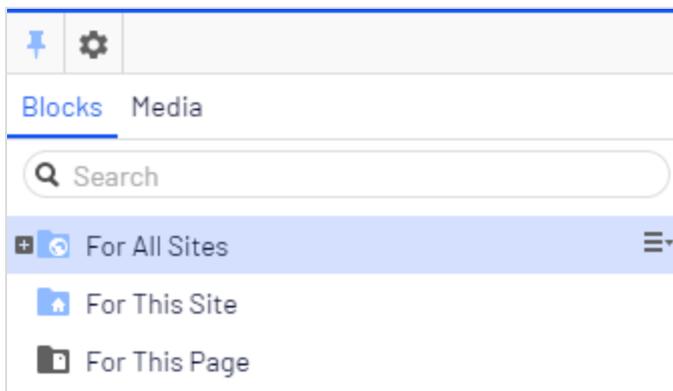
Folders in the [assets pane](#) in Optimizely are used for organizing content, such as [media files](#) (images, videos and documents), and [blocks](#). You can have folders with content that can be shared between all websites in a multi-site scenario (so called global folders), or you can have folders with content that will only be available for a specific website, page, or block (so called site-specific or local folders).



Note: Media and blocks share the same folder structure. This means that if you create a folder under Media, the same folder is also created under Blocks.

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

- **For All Sites.** This is called a global folder. Its content is available to all pages and blocks for all websites in a multi-site installation.
- **For This Site.** This is called a site-specific folder. Its content is available only on the current website (regardless of it is a single or multi-site installation).
- **For This Page or For This Block.** This is called a local folder. Its content is available only for a specific page or block and cannot be accessed from other pages or blocks. It is useful, for example, if you have images for a specific purpose which must only be used for a one page or block.



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

Local folders are not available for catalog content in Optimizely Commerce.

Creating, renaming and moving folders

- To **create** a new folder, select the desired folder in the structure under which you want to add a new folder. Select **New Folder** in the context menu, and provide a name for the folder.
- Select **Rename** in the context menu for the folder you want to rename, and enter a new name.
- Use drag-and-drop or **Cut/Paste to move** folders in the structure.

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

Deleting folders

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

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

Setting access rights for folders

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

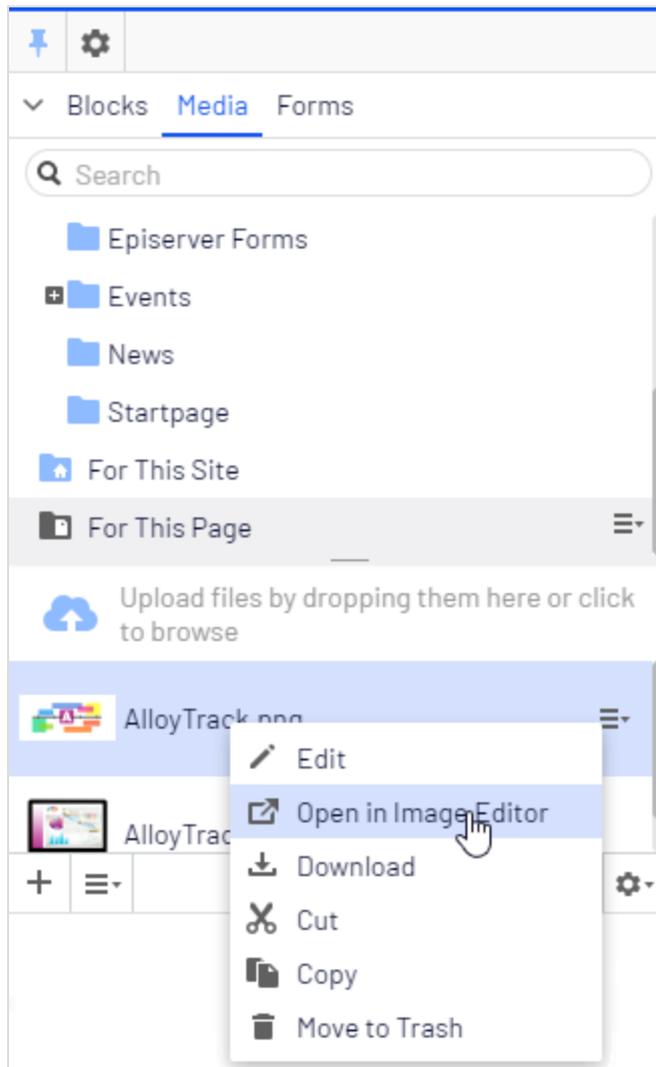
Managing folders in multiple languages

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

Media

Media in Optimizely are images, documents (such as PDF or Word documents), videos, or mp3 files. Media files must be stored in the media library on the **Media** tab in the assets pane to be available in Optimizely CMS. You can either upload a media file to the assets pane and then drag and drop it onto a page or a block from the assets pane, or you can drag and drop the file straight from your computer onto a page or block. In this latter case, the file is automatically uploaded to the assets pane, and is stored in the **For this Page** or

For this Block folder. See the [Folders](#) topic for more information on how to organize your files in folders.



Searching for media

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

Uploading media

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

Note: You must have **Create** access rights to the global or site-specific folder under For All Sites/For This Site where you want to upload a media file, or to the current page when uploading media files to the local For This Page folder.

Publishing media

If your system is not configured to automatically publish media files when they are uploaded, you must manually publish, or schedule for later publishing, media files just as with other items.

Warning: There are a few important things to know regarding publishing of media files.

- If media files should be automatically published on upload, you must have **Publish** access rights for the folder where you upload the files. See Access rights in the CMS Administrator User Guide.
- When a media file is automatically published, it may be immediately indexed by search engines and can thereby be found in searches. This is worth remembering if you are uploading sensitive information that should not be accessible until a set time, such as an annual report.
- If a content approval sequence has been set on your media folder, or if you have a project enabled when uploading media, media files are *never* published automatically.

Inserting media

You can add links to uploaded media files, or insert images and embedded media such as videos. See also: [Adding links](#) and [Adding and editing images](#).

Previewing media

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

Downloading media

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

Editing metadata for media

Available metadata fields depend on the implementation; images can have photographer, description and copyright information. Select **Edit** for the desired media file in the **Media** structure, and then the [All properties editing view](#) to edit the metadata properties.

Renaming media

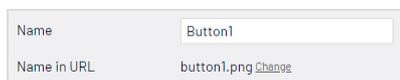
Select the media file in the **Media** structure and then the [All properties editing view](#), and change the **Name** and the **Name in URL**.

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

Replacing media

To replace an existing media file with another, upload a new file with the exact same name to the same folder as the file you want to replace. A replaced media file is published immediately, affecting all places on the website where the file is used.

Note: If you change the name property, the file name in the database is changed as well. If you rename an image, for example, from *Button1.png* to *Button1*, and you later want to overwrite this image, you have to upload an image with the name *Button1* without the file extension. Otherwise it will be uploaded as a new file.



Name	Button1
Name in URL	button1.png Change

Note: When replacing images, the changes may not be immediately visible due to website caching. Refresh the page to see the changes.

Managing media file versions

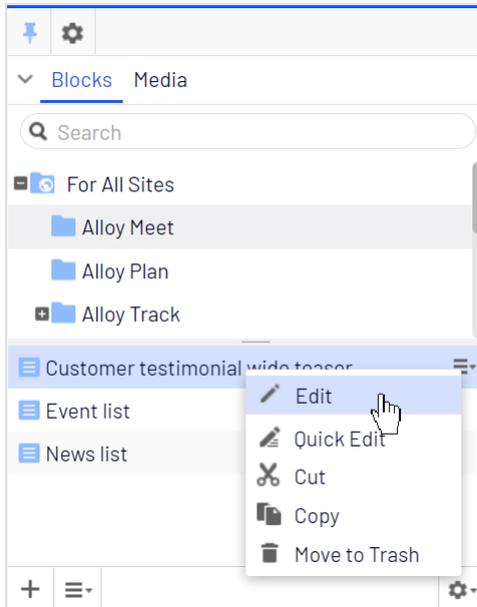
Versions for media files are managed in the same way as for other types of content, that is, by using the **Versions** gadget. See [Publishing and managing versions](#).

Blocks

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

Blocks are managed from the **Blocks** tab under the assets pane in Optimizely CMS, where you can create new blocks and organize them in folders. You can then use blocks by drag-

ging them into the **content area**¹ of Optimizely CMS pages. You can manage block versions like other types of content, and blocks can also be personalized to be displayed for a selected **visitor group**².



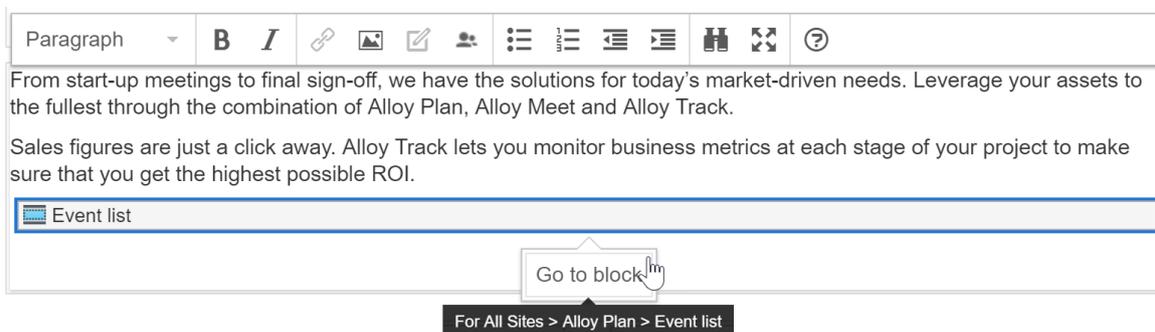
Finding the block location

Use the search field at the top of the pane to [enter search criteria](#) and retrieve blocks. Clicking a search result will expand the folder where the block is located. To browse for blocks, click a folder to expand the folders and content beneath it.

If you have an already inserted a block in the rich-text editor and you want to find out where it is stored, select the block in the editor and a **Go to block** button is displayed. Click this button to open the block or hover over it to see where the block is stored.

¹Where you can drag and drop pages and blocks, and create a block. (A link collection has a similar area for creating links.)

²Site visitors with something in common, such as age, geographic location, and so on. Used in the personalization feature of Optimizely CMS. (See Personalizing Content.)



Views when creating and editing blocks

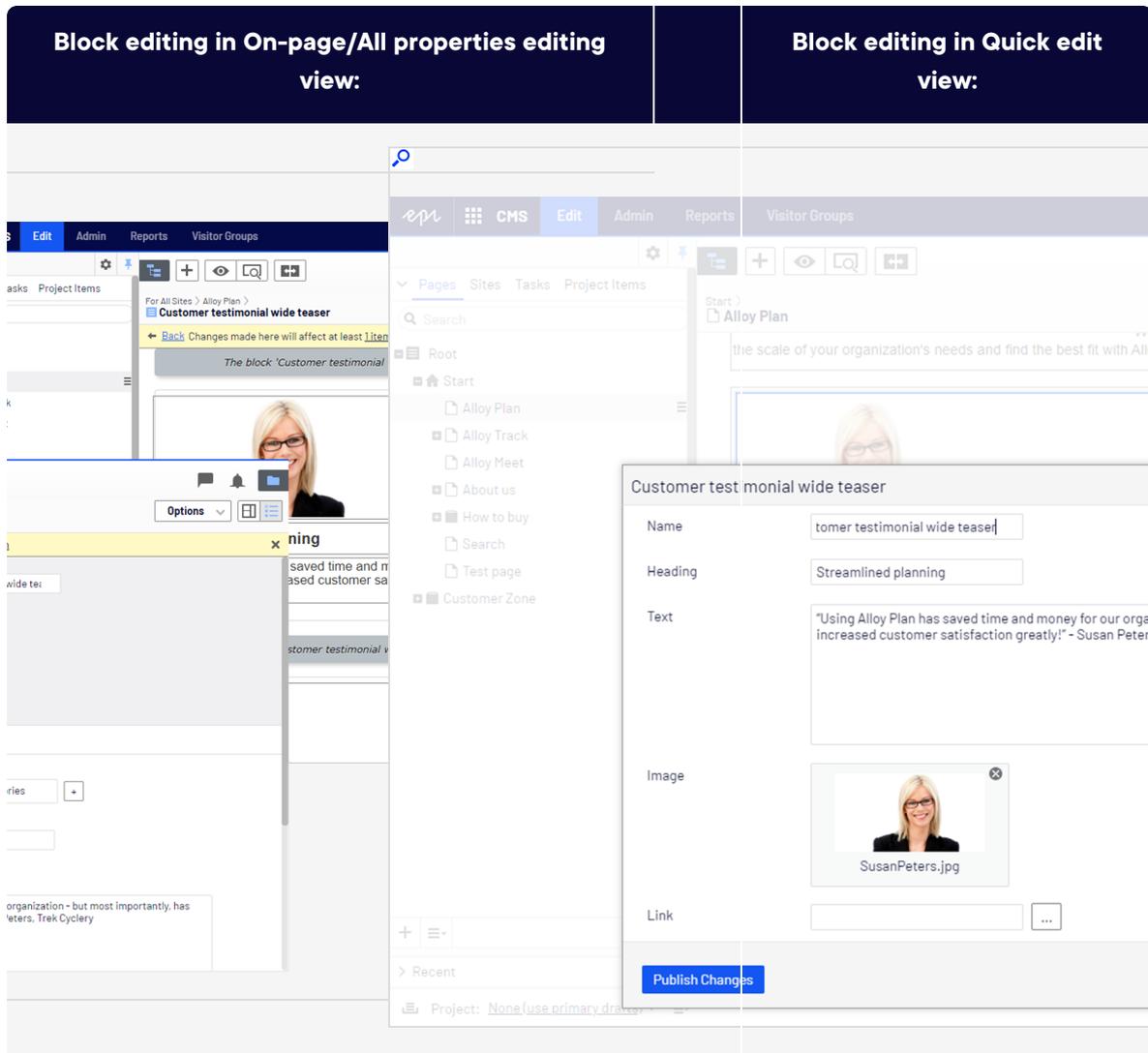
Blocks can be created and edited in different types of views; either in the **On-page editing**¹ or **All properties editing**² views which both open the block in the main content area. They can also be edited in the **Quick edit view**³ which opens the block in a pop-up dialog box.

Using the first option, **On-page** or **All properties editing view**, you can see all properties belonging to the block and you can drag and drop images from the assets pane and so on. Using the second option, **Quick edit view**, you can edit the block without leaving the current context and relevant properties are found in the same view (which properties you see depend on your site configuration). If no approval sequence has been set up for the block, you can also publish your changes directly from the Quick edit view.

¹Where you can edit selected properties for content in a WYSIWYG-like view. (See All properties editing view for comparison.)

²Where you access and edit all properties for content. (See On-page editing view for comparison.)

³The Quick edit view can be used when updating blocks. It lets you see all relevant block properties in one dialog box and you do not have to leave the page context.



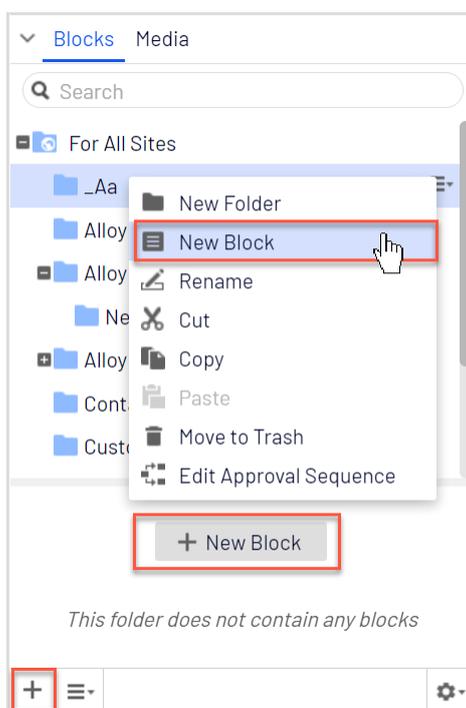
Creating a block

Note: You must have **Create** access rights to the global or site-specific folder under For All Sites/For This Site where you want to create a block, or to the current page when creating a block in the local For This Page folder.

Creating a block from the Blocks tab in the assets pane

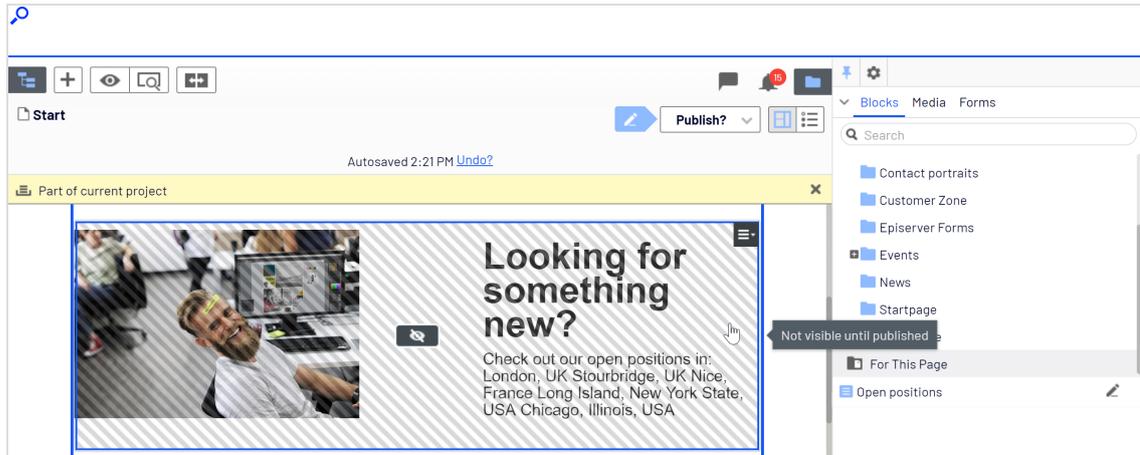
When using this option, you can choose where to save the block in the block folder structure. If you save it under For All Sites or For This Site, the block is available for other pages on the website. If you save it under For This Page, it is only available for use on the current page. Creating a block from the assets pane will use the On-page or All properties editing views.

1. Select the folder in the structure where you want create a block, and select **New Block** in the context menu, or click one of the **New Block** buttons.



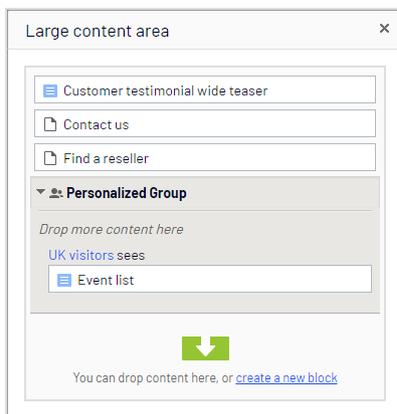
2. Select the block type among those that are available, and provide a name for the block.
3. Depending on the type of block, add content as appropriate.
4. Publish the block immediately or schedule for publishing later. Unpublished blocks are not visible to visitors, and appear dimmed out in edit view when added to a content

area.



Creating a block directly from a content area

When using this option, the block is saved in the For This Page/For This Block folder for the selected page or block, which means that it is not available on any other pages on the website.



1. Click **Create a new block** in the content area, from the On-page or the All properties editing view.
2. Select the block type among those that are available and give the block a name.
3. Depending on the type of block, add content as appropriate.
4. Click **Create**. If there is an approval sequence set on the page or if you do not have publish rights, the block is created as a draft, otherwise it is immediately published.

Editing a block

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

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

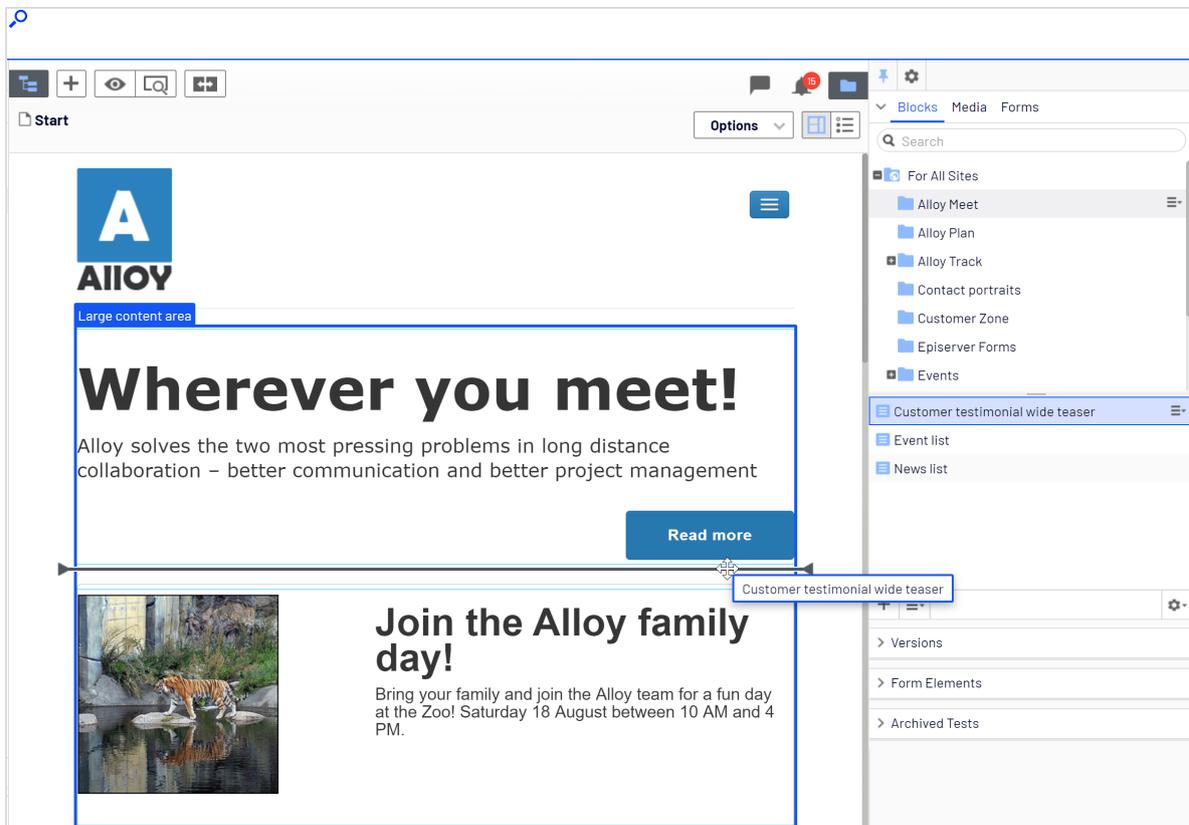
1. Select the desired block to edit. Select either **Quick Edit** from the context menu to open the block in Quick edit view, or **Edit** to open it in On-page or All properties editing view.
2. Depending on the type of block, change the content as appropriate.

If you want to rename the block, use the [All properties editing view](#).

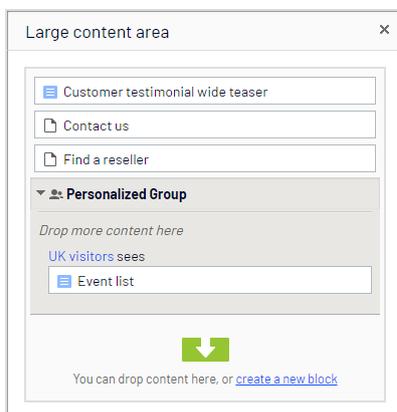
3. Depending on which view you are using, as well as the system configuration and your access rights, you have the following options:
 - In **Quick edit view**, save the block to return to the page, or set the block to Ready for Review, Ready to Publish, or publish your changes immediately.
 - In **On-page/All properties editing view**, set the block to Ready for Review, Ready to Publish, or publish the block immediately. In these views, you can also schedule it for later publishing.

Using blocks in content

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

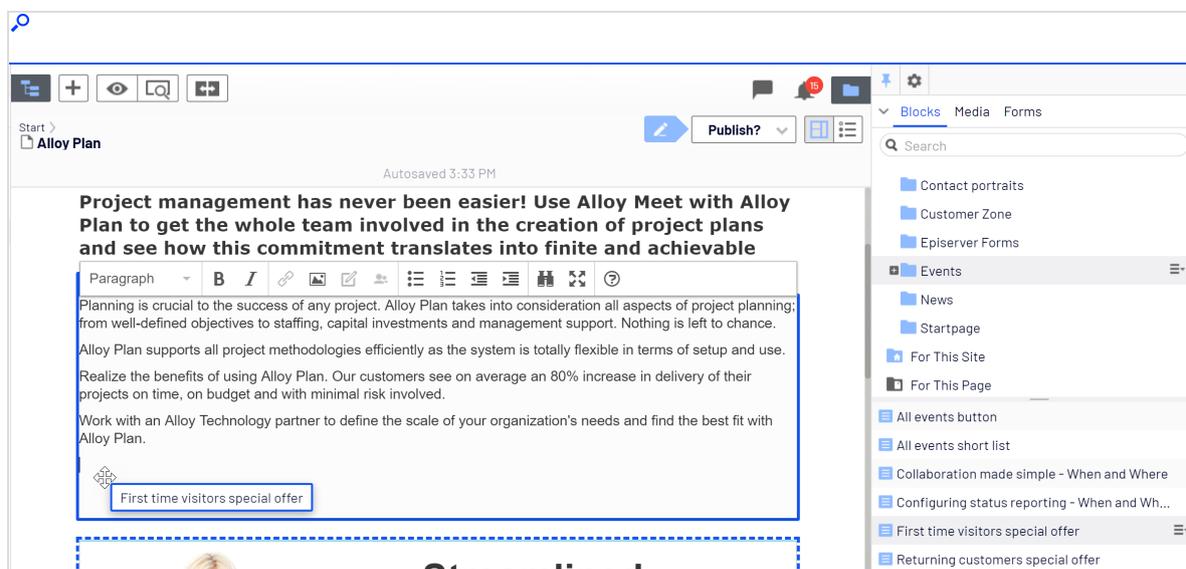


You can add several blocks to the same area. Drag the block above or beneath an existing block, and drop it when the separator appears. The blocks can be rearranged later. It is also possible to add blocks to a content area in the [All properties editing view](#).



Note: Like blocks, **pages** from the page tree can also be dropped into a content area. Depending on how the page template is built, the content of the selected page is rendered in the content area.

Blocks can also be added to a **rich-text editor area** through drag and drop.



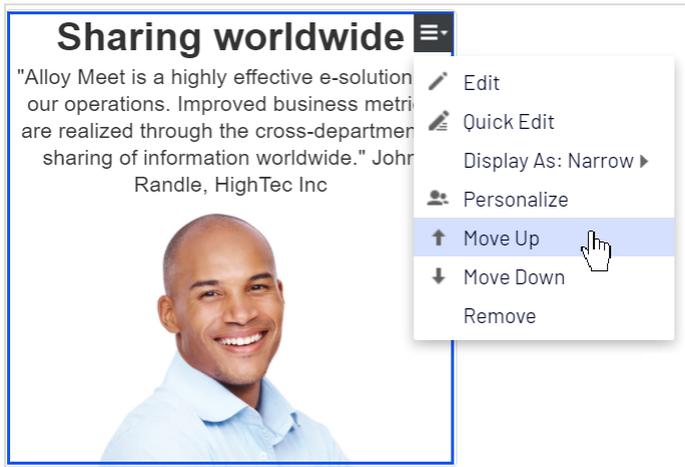
To **remove** a block from a content area, select **Remove** from the context menu.

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

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

Arranging blocks in a content area

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

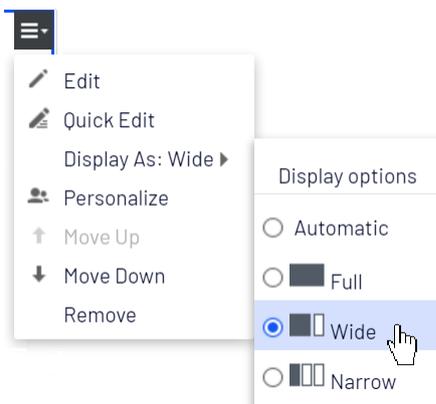


Displaying blocks in different styles

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

The following options are available:

- **Automatic.** Select this option to display the block using an appropriate built-in style option selected by the system.
- **Manually.** Select this option to display the block using the specific style option, such as **Full**, **Wide**, or **Narrow** presets for the specific context where the block is used.



Moving, copying and removing blocks in folders

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

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

Versions, content languages and access rights for blocks

- **Versions** for blocks are managed in the same way as for other types of content. When you update the properties for a block, a new version will be created, which will be listed in the versions gadget. See [Publishing and managing versions](#).
- **Content languages** for blocks are managed in the same way as for other types of content, see [Translating content](#).
- **Access rights** can be defined for creating and viewing blocks. This is done directly for a specific block in the [All properties editing view](#), or for an entire block structure from the admin view. From code it is also possible to restrict the block types that can be added to a content area. See [Setting access rights from edit view](#) in this user guide and Access rights in the CMS Administrator User Guide.

See also Self-optimizing block in the [Optimizely User Guide](#).

Best practices for organizing assets

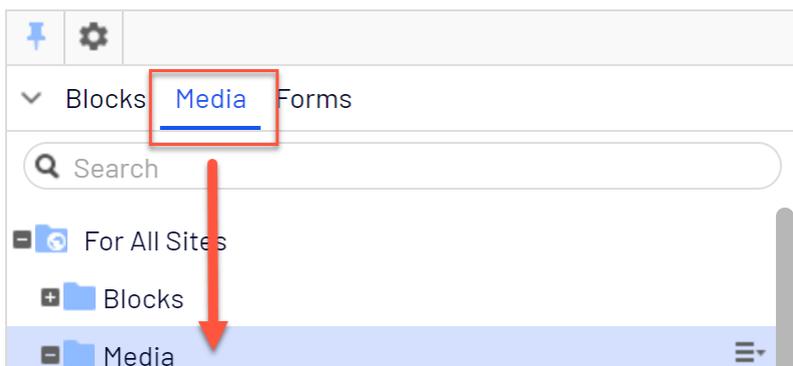
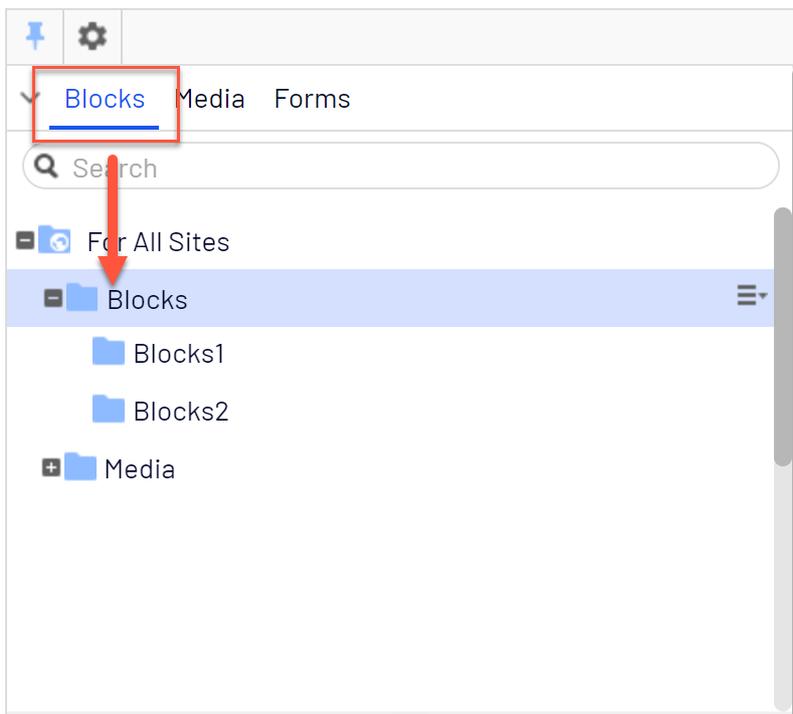
When organizing your assets, the top priority is to always follow the standards set by your organization, as this makes it easier for both yourself and other editors to find already uploaded assets. Following a standard lets editors search for assets, instead of having to browse for them. Make sure your standards are documented where all editors can access them.

If you are free to set your own standards, here are some tips on how to best organize your assets. Do the best you can from the start, with input from others as needed. But remember that you can modify how blocks and media files are organized in the future should the need arise. It will not be done without effort, but perhaps with less pain than you anticipate.

Where to store your assets?

It is critical that the folder structure is simple and intuitive so that editors can find what they are looking for.

Remember that the same structure is used for both blocks and media assets, so if you create a new folder under Blocks, the same folder is automatically added under Media; you can read more about that in the **Folders** topic. If you would like to have different structures for blocks and media files, you can work around the default behavior by creating two top-level folders, one for **Blocks** and one for **Media**. Then use the Blocks folder only for blocks and the Media folder only for media files.



The order of folders and the content in the folders in the assets pane is determined by their names. See [How to name folders and assets?](#) for tips on naming folders and assets.

Global or local folder

You can store assets in three containers, each can contain any numbers of folders. These containers are called **For All Sites**, **For This Site**, and **For This Page (For This Block)**, if you are on a block and not a page). Read more about these containers in the [Folders](#) topic.

- Store your assets in a **global** folder (that is, For All Sites or For This Site) if they should be available for use in multiple places. Logos, icons, and teaser blocks are often used in several places and so are often stored in global folders.
- Store assets in a **local** folder (For This Page/For This Block) if they should only be used in one place. Images related to news, campaigns, events and so on are often just used once and can be stored in a local folder.

Access rights

The folder structure should be set up so it is possible to control who can create, update and delete assets. Access rights can be set on the folder structure and on specific users or user groups. But it is also possible for developers or admins to limit the types of blocks or assets editors can create, and which block types can be added to which page types.

Uploaded assets can either be automatically published or required to be reviewed and published separately from the upload process. See [Publishing media](#) for more information on this setting.

How to name folders and assets?

These naming guidelines apply to both folder names and names of individual assets, such as block names.

Use folder and asset names that clearly describe their content, such as "AlloyMeet_women_spring_campaign_2020.jpg". An image name such as "img_12345678_a.jpg" is not helpful for other editors.

Start off with general area folders and add sub folders with increasing levels of detail, for example, *Products/Alloy Fashion/Campaigns/Womens/2-for-1/teaser_images*.

Sorting folders and assets

Folders and assets are sorted in this order in the assets pane:

1. Names starting with an underscore
2. Numerically
3. Alphabetically

This means that folder "_TeaserImages" is sorted first, followed by folders "1_Logos", "2_Images", "Images" and last "Logos".

Knowing how the folders are sorted helps you to organize assets in a folder structure based on folder names.

Grouping assets in folders

The grouping of assets in folders can follow different principles, or a combination of these principles. You have to work out what is best suited for your type of website, organization, and so on. Here are some examples:

- **Group folders by page tree structure.** If your page tree structure is based on the top-level pages for "Product A", "Product B", "Events" and "Contact us", mimic that structure in the assets pane.
- **Group folders by usage.** Another way of creating a structure for assets is by grouping them by their type of usage, for example, folders for "Campaigns", "Banners", "Buttons", and "News".
- **Group folders by brand or product area.** Group assets to folders by product areas, such as "Clothing", "Shoes" or even product name level for scarves, ties, hats and so on. If you run an Optimizely solution with multiple sites and want to reuse assets between the sites, create brand folders under For All Sites.
- **Grouping folders by language.** You might prefer to distinguish assets by language to keep track of them, especially if you are running culture-specific campaigns with images. In this case, create an EN folder for all English campaign images, an FR folder for French assets, and so on.

- **Grouping folders by access rights.** If several editors are working with the content on the website, you might only have access rights to specific parts of the page tree. Therefore, you would want to have your own folders in the assets pane as well.

Keeping it clean

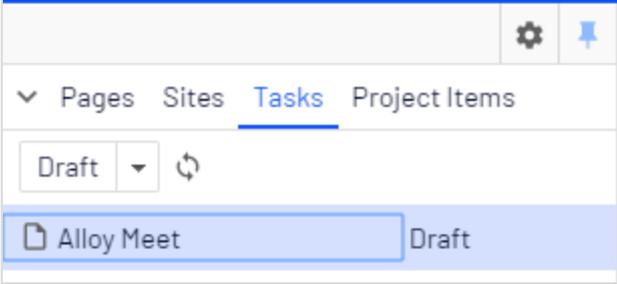
Organizing things is not only about adding things; it is also about keeping things up-to-date and removing things that are not used. Keep your assets fresh by having a routine for deleting or archiving unused assets.

Finding content

Follow these tips to find Optimizely content within **edit view**¹.

What you know	Action
Content location within page, asset or block structure	Use the page tree structure or the blocks and media assets pane and select content.
Content location on the website	Use the preview option, go to the content on the website.
Content is associated with a project	If you are using the projects feature , use the project overview or the project items navigation pane.
Text within content title or body	<p>Use the global search in the top menu or the search fields at the top of the navigation and assets panes.</p> <ul style="list-style-type: none"> • The global search can search all types of content on the website (depending on the configured search provider). • Search fields in navigation and assets panes search for content in respective pane and related dialogs. <p>See Search.</p>

¹A section of the user interface where you edit content items, such as pages and blocks. To access edit view, log in and select CMS > Edit. (See admin view for comparison.)

What you know	Action
A page's status (for example, draft)	<p>Use the Tasks tab to find all content in that status.</p> 
Content was edited recently	<p>Use the <i>Recently changed</i> status in the Tasks tab.</p>

Creating content

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

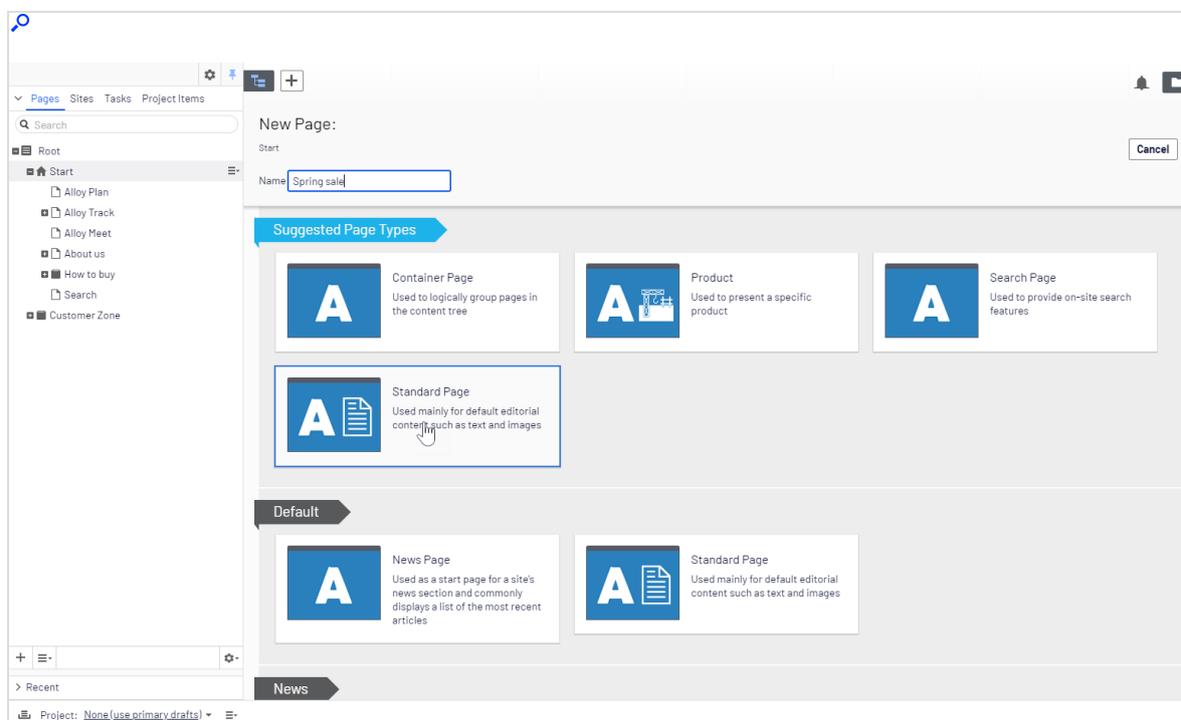
For further enhancing your content, see topics on how to:

- [add different types of links and shortcuts](#)
- [add and edit images](#)
- create web forms using Optimizely Forms in the online Optimizely User Guide

Creating a page

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

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



Creating a block

You create a block in a similar fashion as a page, by selecting a predefined block type that contain properties where information is added. For more information on working with blocks, see the [Blocks](#) topic.

1. Create a block from the assets pane, directly from content areas in pages or from the **add** button in the toolbar.

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

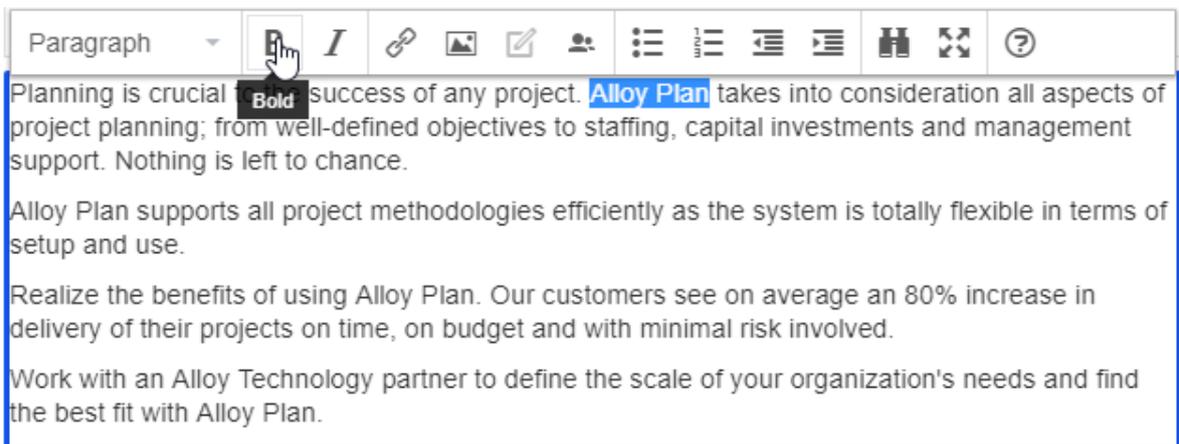
2. Select a block type from the list of available blocks.
3. Provide a name for the block.
4. Add information for the block.

Optimizely Commerce-related content

On an e-commerce website, content can be catalog entries such as products and variants if you have Optimizely Commerce installed. The creation of this type of content is similar to the creation of pages and blocks in CMS. See [Managing content in the Optimizely Commerce User Guide](#).

Editing content using the TinyMCE rich-text editor

The **TinyMCE rich-text editor** is a property where you can enter information such as text with formatting, images, tables and links to other content. The rich-text editor is used for both pages and blocks in Optimizely CMS, and for catalog content if you have Optimizely Commerce installed.



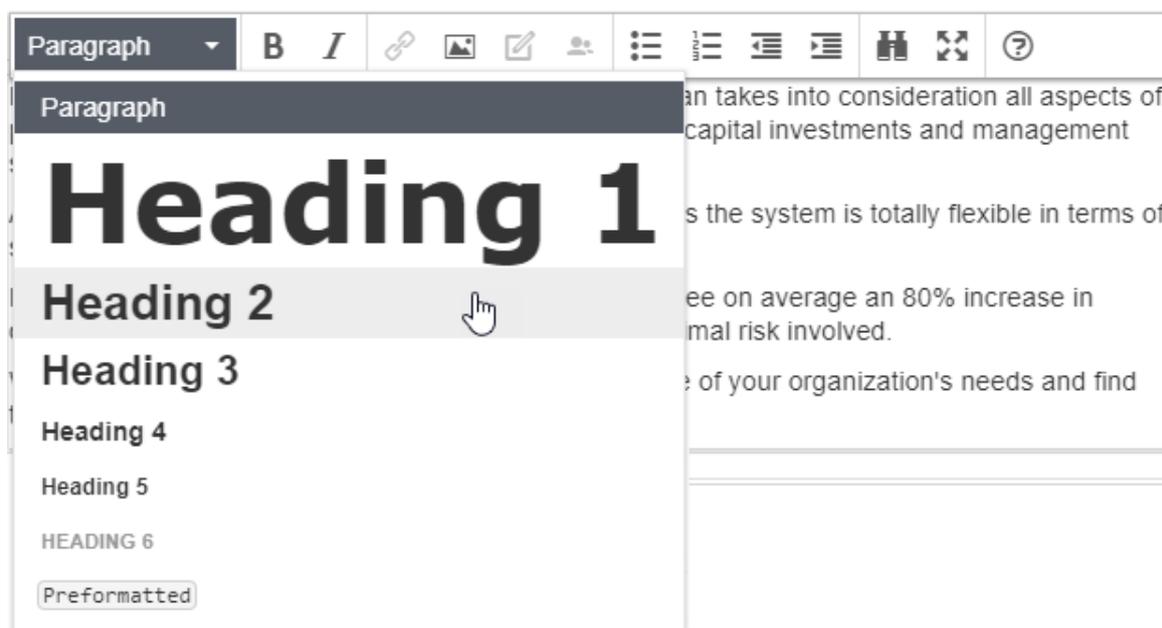
Note: The [Optimizely Digital Experience Platform](#) contains many features to support you in your daily work. Depending on how your solution is set up, some features described in this documentation may not be available to you. Contact your system administrator to find out more. See [Optimizely World](#) for technical information.

The TinyMCE editor is highly configurable, and a developer may have configured it so that it looks different on different page types on your website. There are also a number of plug-ins that may have been added to your editor, but these are not described in this user guide. The Optimizely sample templates come with a standard selection of activated editor functions (buttons) as shown in the image above. For more information on the specific TinyMCE implementation on your website, contact your administrator.

You can [drag and drop blocks](#) into the editor area, and pages from the page tree to [create links](#). Spell checking is available from the browser you are using, or through the Spell checker add-on from Optimizely.

Formatting

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



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

Keyboard shortcuts

You can use many of the standard keyboard shortcuts in the rich-text editor.

List of common keyboard shortcuts

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

Command	Shortcut keys	
	Windows	Mac
Select all	CTRL+A	CMD+A
Undo	CTRL+Z	CMD+Z
Redo	CTRL+Y	CMD+Y
Bold	CTRL+B	CMD+B
Italic	CTRL+I	CMD+I
Underline	CTRL+U	CMD+U
Copy	CTRL+C	CMD+C
Cut	CTRL+X	CMD+X
Paste	CTRL+V	CMD+V
H1–H6 headings	ALT+Shift+1–6	CTRL+ALT+1–6
Paragraph break	Enter	CTRL+O
Line break	Shift+Enter	Shift+Enter
Focus to toolbar	ALT+F10	ALT+F10
Insert link	CTRL+K	CMD+K
Toogle fullscreen	CTRL+Shift+F	CTRL+Shift+F
Find and replace	CTRL+F	CMD+F

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

Adding links

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

- **Page.** Links from one page to another on the same website.
- **Media.** Links to images, documents and other media files stored on the web server.
- **Email.** Links to create an email message with the linked email address entered.
- **External.** Links to content on other websites or media on file shares.
- **Anchor.** Links to sections within a page, allowing readers to jump between topics on a page.

You can also use **shortcuts**, a specific type of link used for navigation and reusing existing website information. See [All properties editing view](#).

Creating a link

You can create a link in the [rich-text editor](#) through drag and drop (pages and media files), or by selecting text and clicking the **Insert/edit link** button in the toolbar, which displays the **Create link** dialog box.

Create link [X]

Link title: Alloy - meet the team

Open in: [Dropdown]

Language: Automatic (default) [Dropdown]

Page: About us [X] [...]

Media: [Input] [...]

E-mail: [Input]

External link: [Input]

Anchor: [Dropdown]

Remaining Url: [Input]

[OK] [Delete] [Cancel]

- **Link title** displays as descriptive text for the link, such as on mouse-over.
- **Open in** lets you display the link in a new window, often used for links to external sources.
- **Language** lets you link to a specific language version for content. **Automatic** directs visitors to the detected browsing language version.

Overview of creating different types of links:

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

Linking to a page on the same website

You can create internal links in two ways:

- Place the cursor in the rich-text editor where you want the link, and drag the desired page from the **page tree** into the location. The page name becomes the link name (which you can edit, if needed).
- Or, select the text where you want the link in the rich-text editor, and click **Insert/edit link**. In the Create link dialog box, you can select the **Page** option and browse to a page to

link to, or select the **External link** option and paste a web address (**URL**¹) to a page on your website. If you choose the **External link** option, Optimizely automatically converts the link to an internal link.

Remaining URL

The **Remaining URL** field is used to add, or edit, query string parameters. A query string is a dynamic part of a link and is not related to the website structure. It can be data from a logged in user, data from a form submission, search result data and so on. A typical URL containing a query string can look like this:

<https://www.alloyexamplesite.com/Search/?searchQuery=reseller>. The query string parameters (in bold) following the URL open the search results for "reseller".

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

¹Stands for "Uniform Resource Locator". Also known as a web address such as <http://world.optimizely.com>.

Create link ×

Link title

Open in ▼

Language ▼

Page

Media

E-mail

External link

Anchor ▼

Remaining Url

Linking to a page on an external website

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

If you create an external link to a page found on the website you are working on, for example, by copying and pasting a URL from the website, Optimizely recognizes this and

automatically converts it to an internal link. If the link contains query strings parameters, the query string parameters can be edited in the [Remaining Url option](#). See [Linking to a page on the same website](#).

Linking to files in Media

You can create links to media in the Media folder in two ways:

- Place the cursor in the rich-text editor where you want the link, and drag the desired file (PDF, Word and so on) from a **Media** folder into the location. The filename becomes the link name (which you can edit, if needed).
- Select the text where you want the link in the rich-text editor, click **Insert/edit link** and use the **Media** option to select a media file to link to.

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

Linking to files on a file server or an external website

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

Linking to an email address

Select the text where you want the link in the rich-text editor, click **Insert/edit link** and use the **email** option to enter the email address to link to. When you click the link, the default email client opens with the email address entered in the address field of the email.

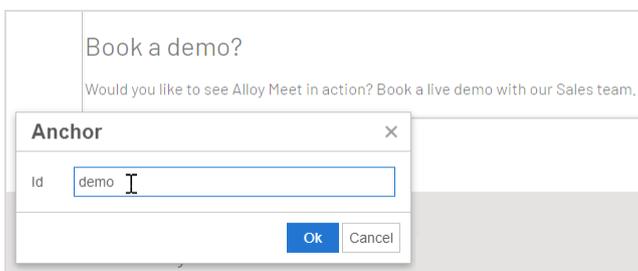
Linking from an image

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

Creating anchor links

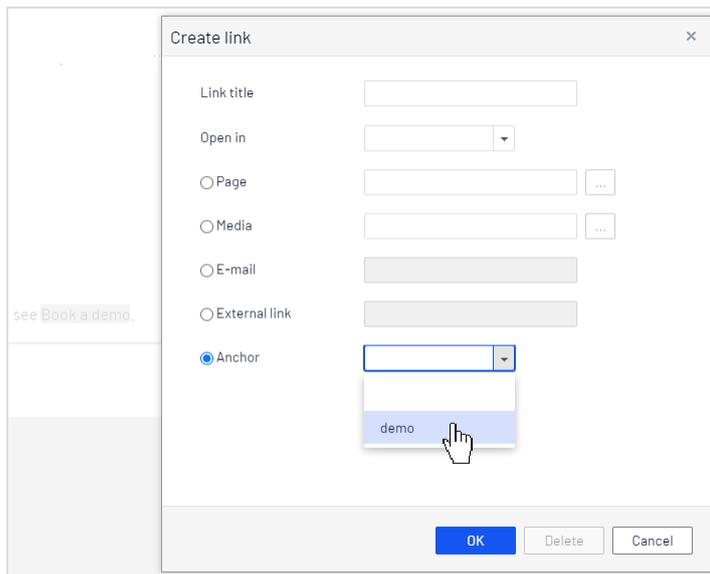
When you add an anchor, first create the anchor and then add the link to it from the Create link dialog box.

1. Place the cursor in the text in the rich-text editor where you want to place the anchor.
2. Click **Insert > Anchor** on the editor toolbar and enter a name for the anchor. Do not use special characters or spaces.



3. Select the text in the rich-text editor where you want the link to the anchor.

4. Click **Insert/edit link** and use the **Anchor** option to select the anchor to link to.



Link properties

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

Image link

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

Link collection

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

A
Alloy

[Start](#) [Alloy Plan](#) [Alloy Track](#) [Alloy Meet](#) [About us](#)

Search

Wherever you meet!

Alloy solves the two most pressing problems in long distance collaboration – better communication and better project management

[Read more](#)

Alloy Plan
Project management has never been easier!

Alloy Track
Get the whole team involved in the project!

Alloy Meet
You've never had a meeting like this before!

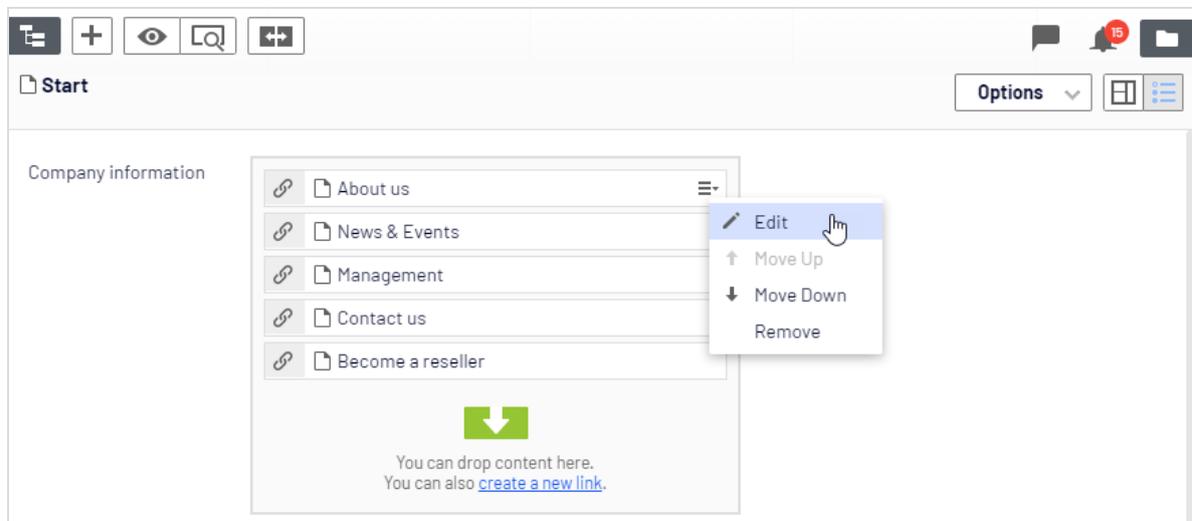
Products
[Alloy Plan](#)
[Alloy Track](#)
[Alloy Meet](#)

The Company
[About us](#)
[News & Events](#)
[Management](#)
[EPIserver World \(external link\)](#)
[Become a reseller](#)
[Contact us \(e-mail\)](#)
[ProductSheet \(document\)](#)
[AlloyPlan \(image\)](#)

News & Events
[Events](#)
[Press Releases](#)
[Products](#)
[Alloy Track](#)
[Alloy Meet](#)

Customer Zone
[Reseller extranet](#)
[Log out](#)

You can create links by dropping pages or media files in the link collection area, or by creating links through the link dialog box. You can create links for pages, media files, external sources and email addresses. You can move links to change the order in which they appear.



You can also edit the displayed name of the link.

The image shows a 'Create link' dialog box with the following fields and options:

- Link name/text:** Product sheet (PDF)
- Link title:** Product sheet (in PDF)
- Open in:** Open the link in a new window
- Language:** Automatic (default)
- Page:** (empty field with a search icon)
- Media:** ProductSheet_AlloyTra... (selected, with a search icon)
- E-mail:** (disabled field)
- External link:** (disabled field)
- Remaining Url:** (empty field)

Buttons at the bottom: OK (blue), Delete, Cancel.

Linking to catalog entries

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

Adding and editing images

A web page does not embed images, instead it links to the media library where images are stored. To display images in your content, the images must be available in a folder under **Media** in the assets pane. You can either first upload an image to a folder in the assets pane, and then add it to your content, or you can drag and drop an image directly from your computer to a content area. In this latter case, the image is automatically uploaded and stored in the **For This Page** (or **For This Block**) folder.

You can edit images inside Optimizely using the **Image Editor**, providing basic image editing features such as cropping, resizing and transforming.

Adding images to content

In image link property

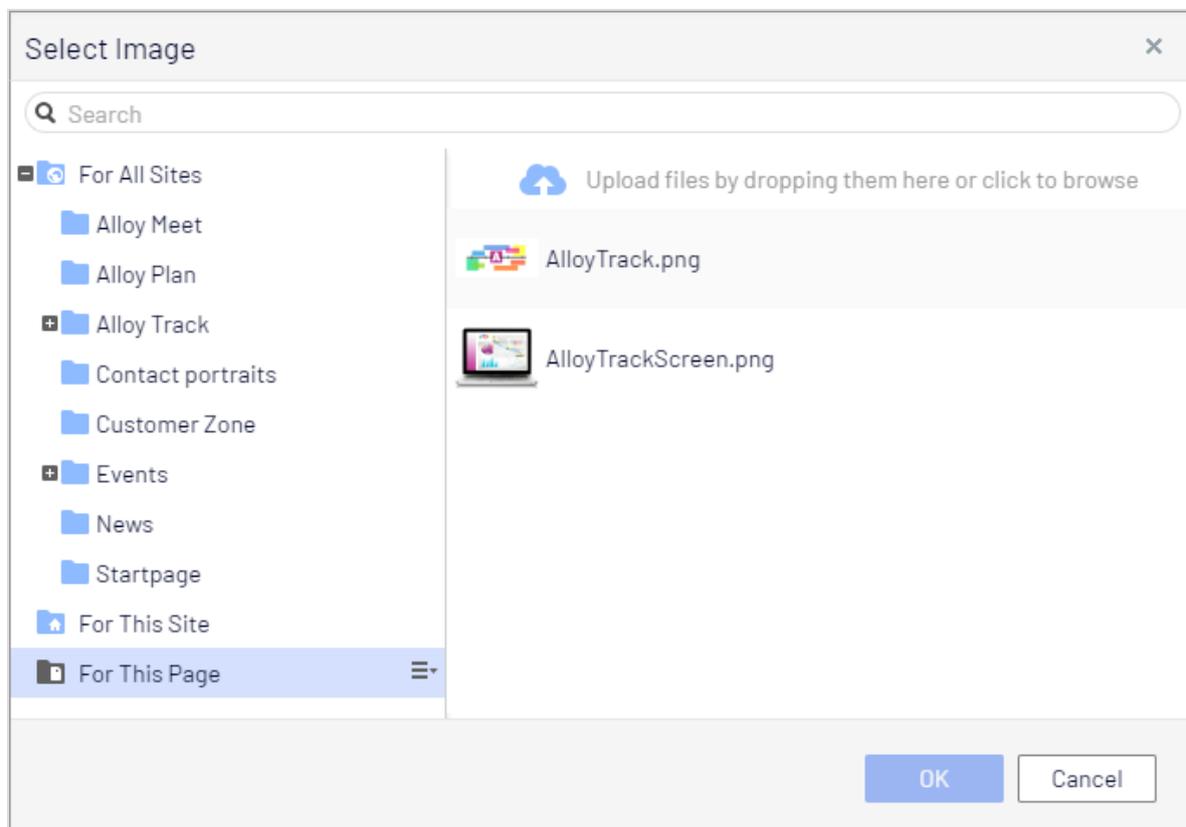
Images are often added to content through an **image link property**. You can either drag and drop an image from the assets pane or from your computer to the property. If you drag and drop from your computer, the image is automatically uploaded and saved in the **For this Page** or **For this Block** folder in the assets pane. See [Media](#) for information on how to manually upload images to the assets pane.

To replace an already added image, click the image and the **Select Image** dialog box opens. In this dialog you can select another already uploaded image or upload a new image. You can also replace the current image by simply dragging and dropping another image into the image property.

The screenshot shows a content management system interface for editing a page titled "About us". At the top, there is a toolbar with icons for undo, redo, and other actions. Below the toolbar, the page title "About us" is displayed, along with a "Publish?" button and a "Tools" dropdown menu. The main content area is divided into several sections:

- Metadata:** A table-like structure showing page details:

Name	About us	Visible to	Everyone Manage
Name in URL	about-us Change	Languages	en
Simple address	Change	ID, Type	10, Standard Page
- Navigation:** A checkbox labeled "Display in navigation" is checked.
- SEO, Content, Settings:** A horizontal menu with "Content" selected.
- Category:** A text input field containing "Add one or more categories" and a "+" button.
- Teaser image:** A section with a red border containing a green downward arrow icon and the text "Drop here or click to select image".



In rich-text editor or content areas

You can also add images to the **rich-text editor** or **content areas** in pages or blocks. To add an image this way, you can drag and drop the image directly from your computer into the rich-text editor. The image is automatically stored in the **For This Page** (or **For This Block**) folder with its original file name. Another way is to first [upload the image](#) to a folder under **Media** in the assets pane and then add the image through **drag and drop** from the folder, or by using the **Insert/edit image**  button on the toolbar in the rich-text editor.

1. Place the cursor in the editor area where you want the image.
2. Click the **Insert/edit image** button on the editor toolbar.
3. Select the desired image in the **Source** folder structure.
4. Enter an **Image description** for the image. It is added as an HTML `<a>` tag to the image and this is important when a reader has turned off the display of images in the browser

or when a visually impaired user is using a screen reader.

5. Click **Ok**.

Note: The TinyMCE editor supports the following image formats: **jpeg**, **png**, **gif**, and **bmp**.

Aligning images

You can align images so that they are aligned to, for example, the right and the text wraps around the image to the left:

Alloy Track

Projects have a natural lifecycle with well-defined stages. Progress monitoring is a critical part of making sure that your project is on-track and capable of delivering in the end.

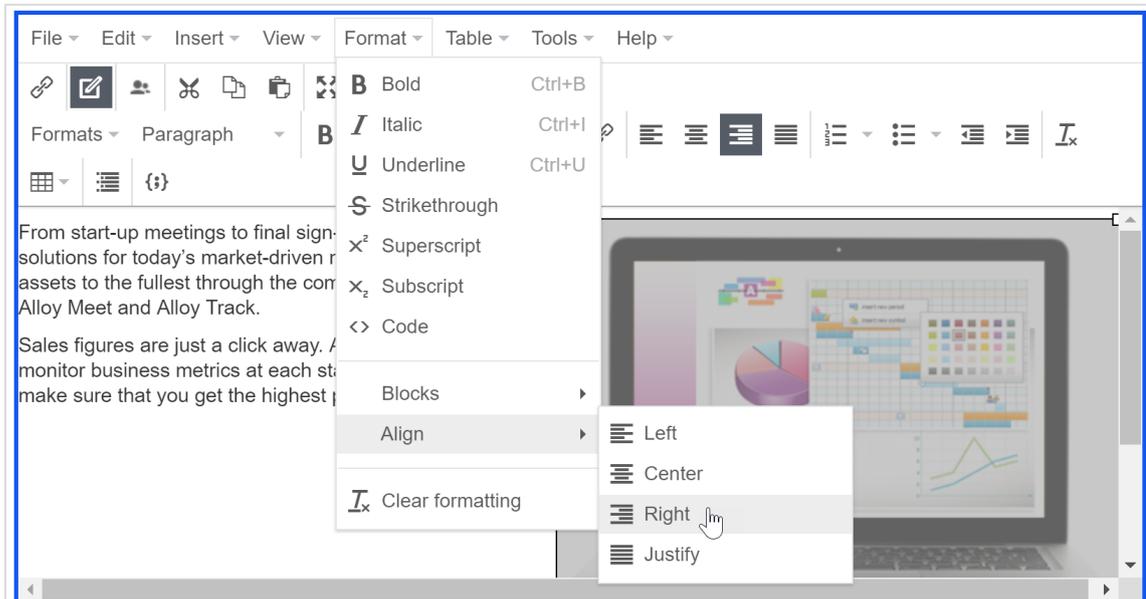
From start-up meetings to final sign-off, we have the solutions for today's market-driven needs. Leverage your assets to the fullest through the combination of Alloy Plan, Alloy Meet and Alloy Track.

Sales figures are just a click away. Alloy Track lets you monitor business metrics at each stage of your project to make sure that you get the highest possible ROI.



1. Place the cursor at the end of the text you want to wrap around the image.
2. Drag and drop the image onto this location.
3. Select the image.

4. On the editor toolbar, select **Format > Align > Right**:



Finding the image location

If you have an already inserted image in the rich-text editor and you want to find out where it is stored, select the image and a **Go to media** button is displayed. Click this button to open the image or hover over it to see where the image is stored.

Paragraph ▾ **B** *I* [Link](#)          

Alloy meetings are easy to setup and moderate. All discussion points, presentations, and whiteboard sketches are captured and stored in meeting notebooks. Action items are highlighted and e-mailed to the action owner.

Are your operations spread out across time zones and continents? What is the best way of leveraging this wide-ranging expertise?

Alloy Meet helps companies save on skyrocketing travel costs through facilitating virtual meetings. You too can be a part of the solution and reduce your corporate carbon footprint. Contact an Alloy Technologies partner to help calculate your savings and get you started with Alloy Meet.

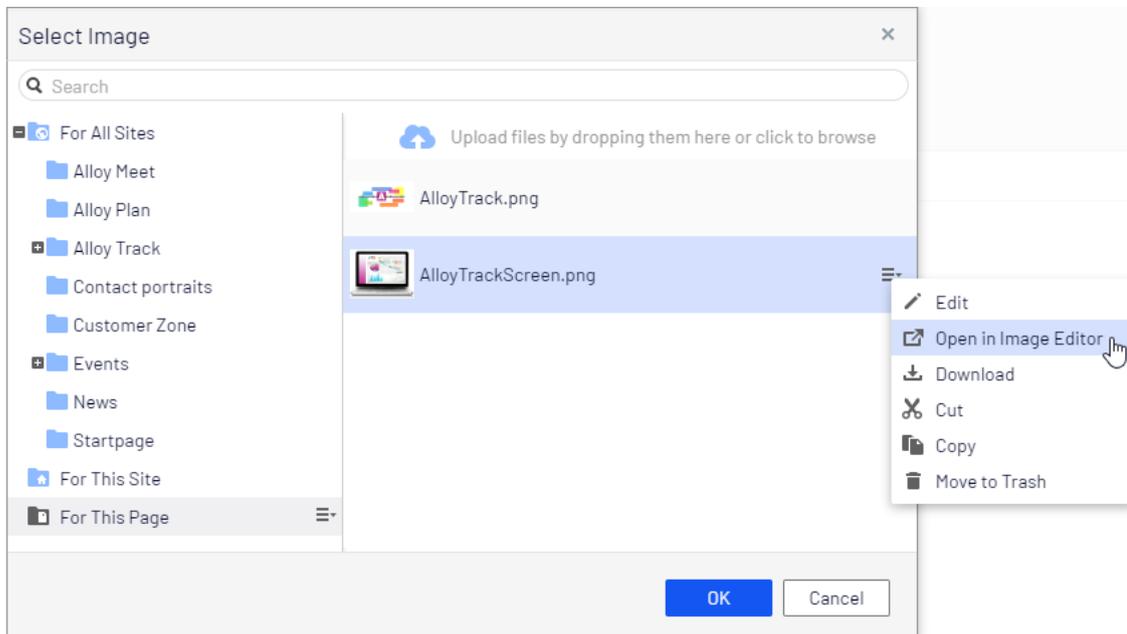
[Go to media](#)

For This Page > AlloyMeetScreen.png

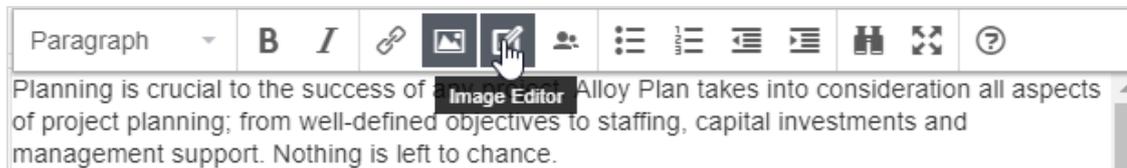
Editing images

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

- In an image link property, click in the image property to open the **Select Image** dialog box, and select **Open in Image Editor** from the image's context menu:



- In the rich-text editor, select the image and then click **Image Editor** in the toolbar.



- Locate the image under **Media** in the assets pane, and select **Open in Image Editor** from the context menu.

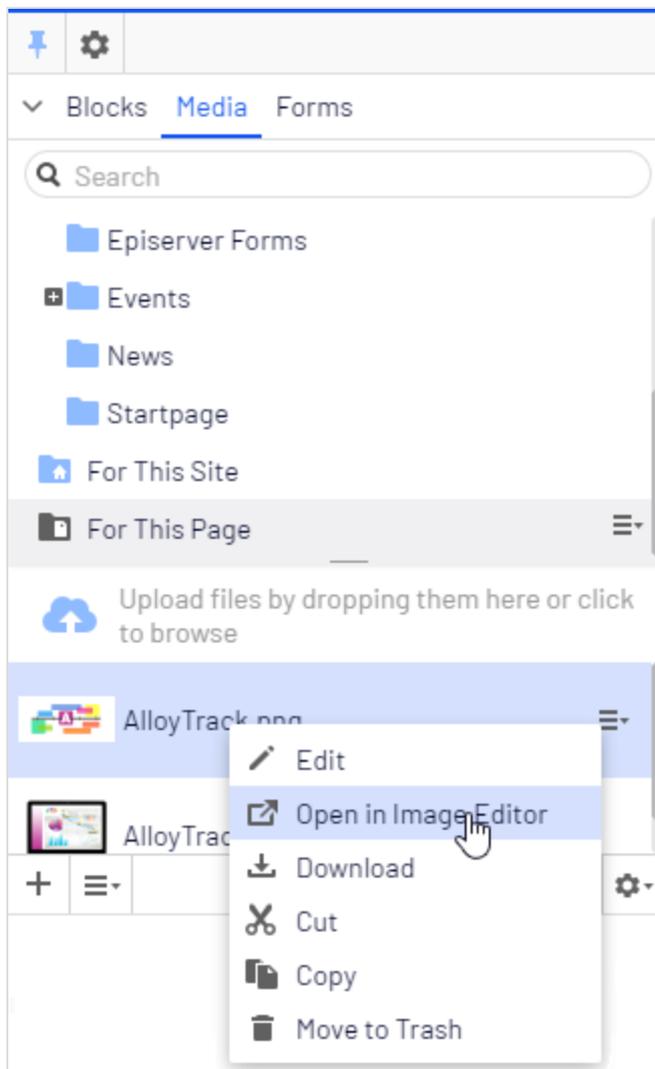


Image editing features include cropping, resizing and transforming:

Image editing	Description
<p>Crop</p>	<p>Enter values for Top, Left, Width and Height, or draw a selection in the image to crop.</p> <p>Note: Remember to click Apply to save the changes before proceeding.</p>

Image editing	Description
	You can apply Preset values if such values have been configured for the website.
Resize	<p>Enter values for Width and Height, or move a corner handle to resize, keep Constrain proportions selected to retain the image proportions.</p> <p>Note: Remember to click Apply to save the changes before proceeding.</p> <p>You can apply Preset values if such values have been configured for the website.</p>
Transform	Flip or rotate the image, or select Grayscale to convert to grayscale.

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

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

Note: Selecting the **Edit** option in the context menu for an image lets you edit the **metadata**, which for an image can be photographer, description and copyright information and such. See [Media](#).

Removing images from content

For an image in:

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



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

Working with web forms

Web forms are excellent ways of collecting information and interacting with visitors to your website. Typical examples of web forms are polls and surveys, registration forms, and contact requests. See the Optimizely Forms add-on, which lets you work with form components in a similar fashion as, for example, when dragging blocks into a content area.

If you are on an older Optimizely CMS version, using the legacy built-in form feature, see [version 18-2](#) or [earlier of the Optimizely User Guide](#).

Collaboration between editors

Most website content is produced by different editors, and on some websites, content or other changes need to be reviewed and approved before they can be published. To facilitate collaboration between editors when creating content and between editors and reviewers when approving changes, Optimizely comes with a commenting functionality. You can add comments on content items and on projects, and you can also tag colleagues who are then notified of your comment.

Comments are a good way of adding information about changes you have made or asking other editors to review the item. Other editors can view your comments and reply to them, and also add their own. Email notifications may be sent out to let you know of other editors' actions.

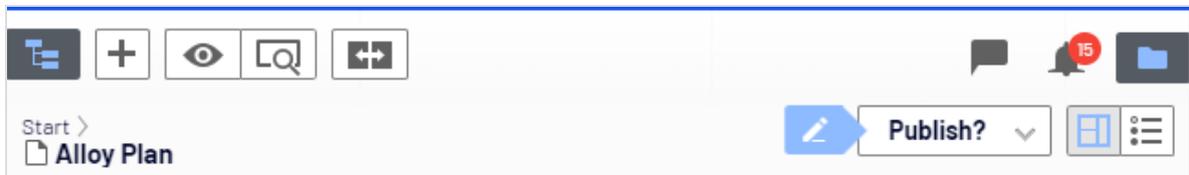
Note: Comments are connected to a specific version of an item. If you delete an item version, all comments on that version are also deleted.

Adding comments

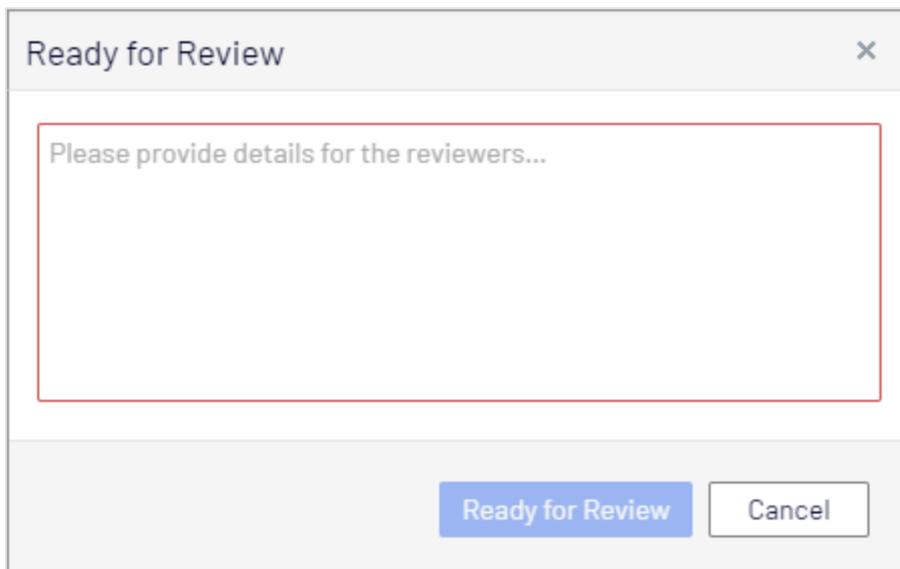
Commenting on content items

You can add comments on any type of content item. A real-life scenario might be when you are working on an item that needs to be reviewed, and you want to let the reviewers know exactly what has been updated.

You add and view comments in the comment panel. It is opened and closed by clicking the comment symbol in the top toolbar. The icon is black when the comments panel is hidden, and blue when it is visible.

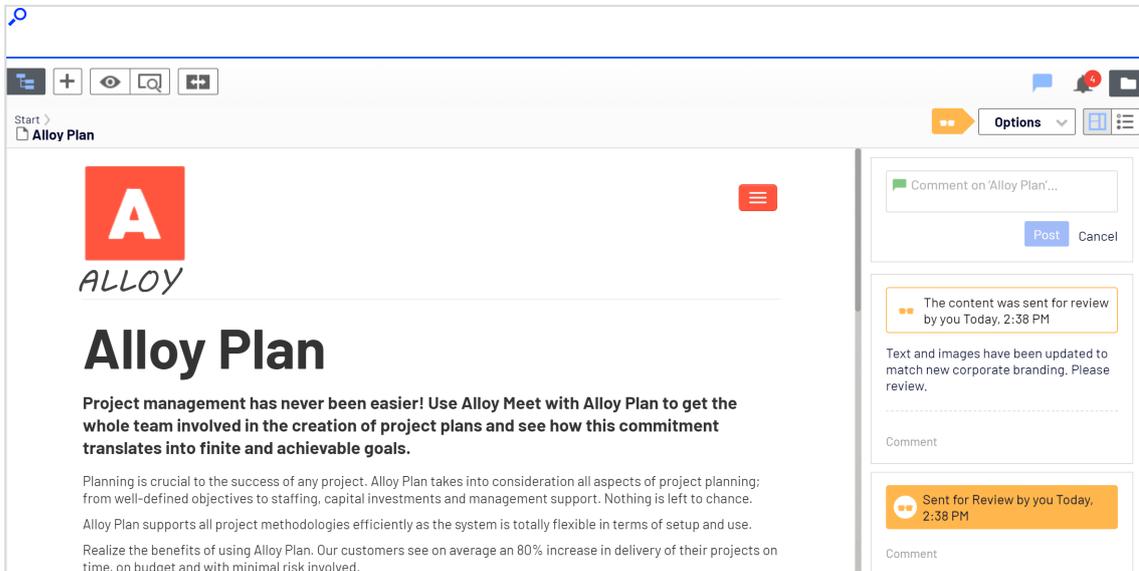


If you are using the [Content approvals](#) feature, an administrator may also have made it mandatory to add a comment when you set an item for **Ready for Review**. In that case, the following dialog box is displayed when you send something for review:



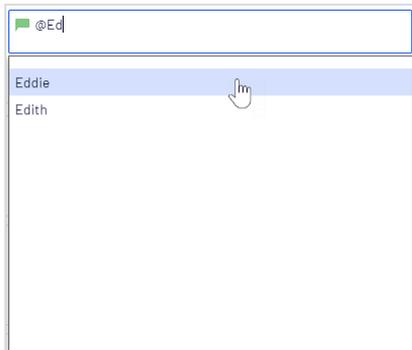
Adding a comment to a content item:

1. Open the content item. You need access rights to the item to view and post comments.
2. Click the comment symbol  in the top toolbar to open the comment panel.
3. You can either add a comment in the top comment text box to add a comment on the content item itself, or click **Comment** on one of the item's actions. For example, if the item has been sent for review, you can add a comment on the review request action.



4. To tag another editor, enter @ followed by their user name. Select the user from the displayed list of suggested users. You can tag any of the available users but the tagged user still needs access rights to the project item to see the actual comment.

Tagged users are notified in the user interface of comments.



5. Press Enter or click **Post**.

Commenting in projects

You can add comments on a project itself or on specific project items or actions.

Note: If you go to the project overview to read a comment, the project is automatically activated. If you do not want to continue working in the project, you have to deactivate it again.

Image: Comment on project

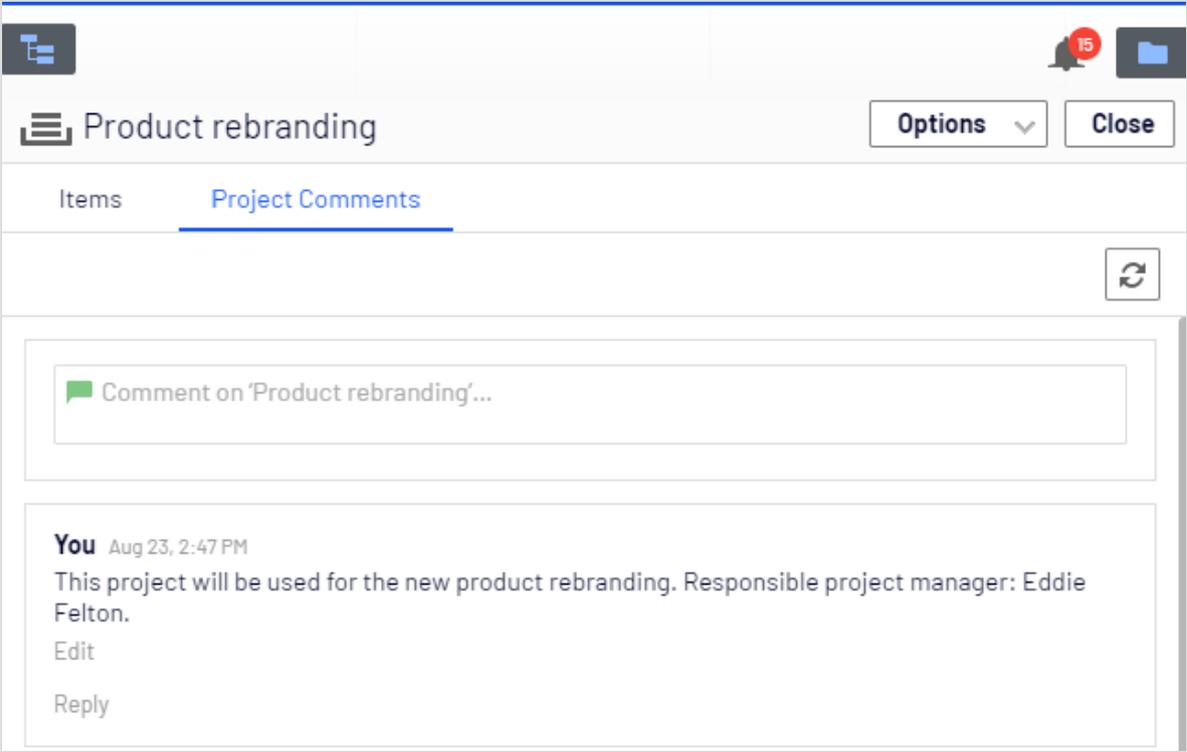


Image: Comment on project item

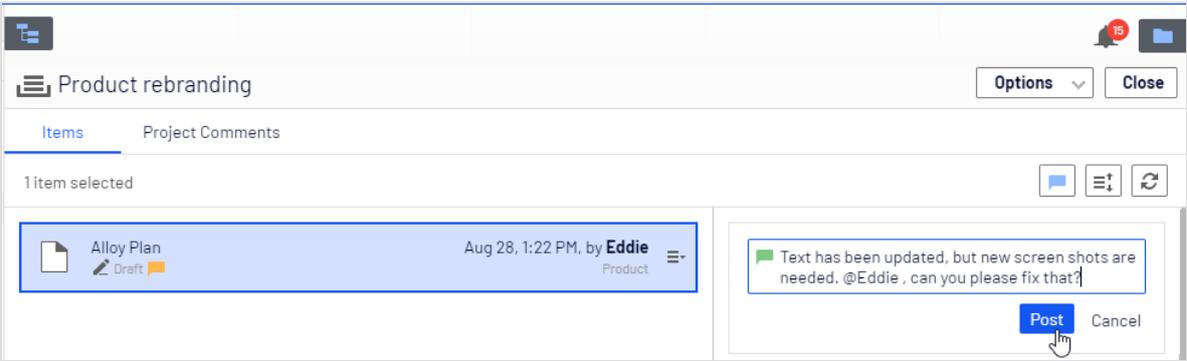
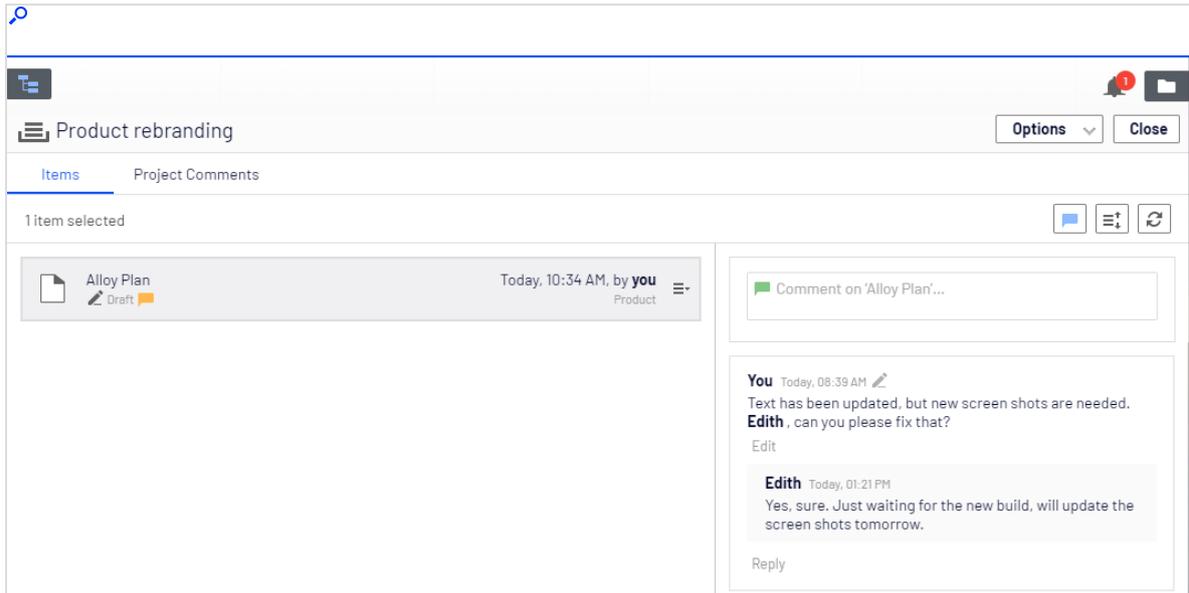
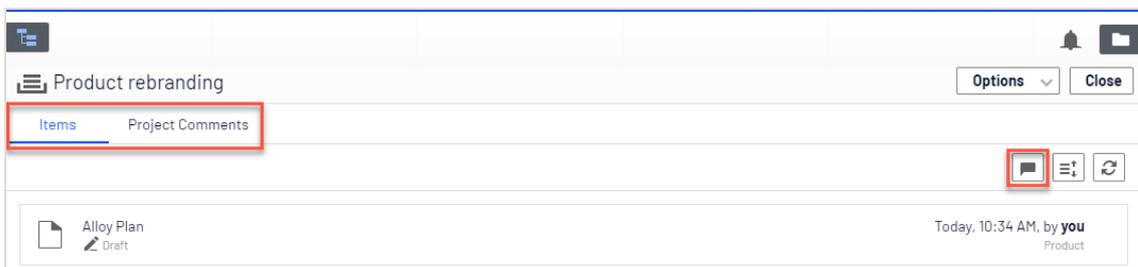


Image: Reply to comment on project item



Adding a comment to a project or project item

1. Select the project in the project toolbar and click **Overview**.
2. To add a comment to a:
 - **Project.** Select the **Project Comments** tab in the project overview.
 - **Project item.** Select the **Items** tab in the project overview and then **Show comments**. Select the project item you want to comment on. Items that already have comments are marked with a yellow comment icon 🟡.



3. **Add** a comment in the comment text box. If you add a comment on a project item, you can either add it to the item itself or click **Comment** on one of the item's actions.

4. To tag another user, enter @ followed by the user name. Select the user from the displayed list of suggested users. The tagged user receives a notification in the user interface, and depending on the system configuration, may also receive an email notification. You can tag any of the available users but the tagged user still needs access rights to the project item to see the actual comment.
5. Press Enter or click **Post**.

Image: Comment on project

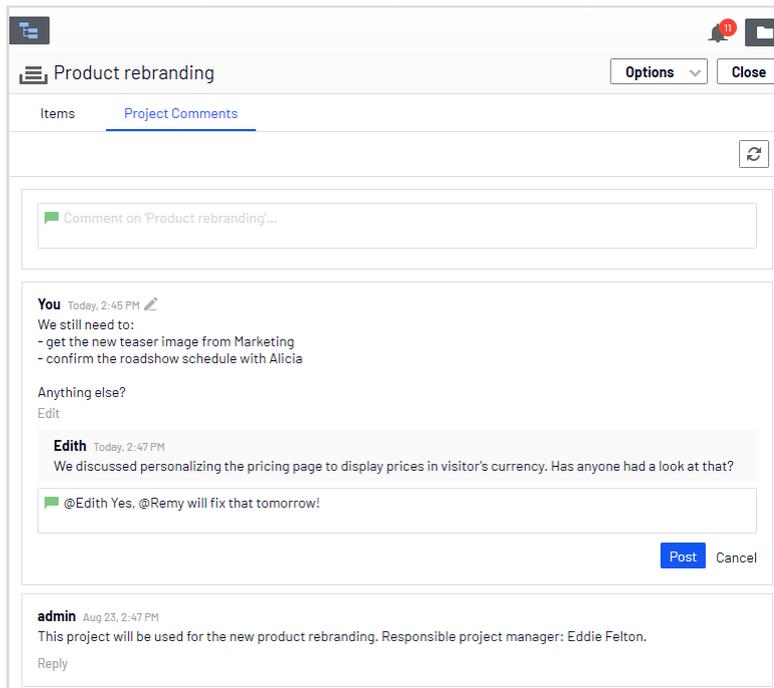
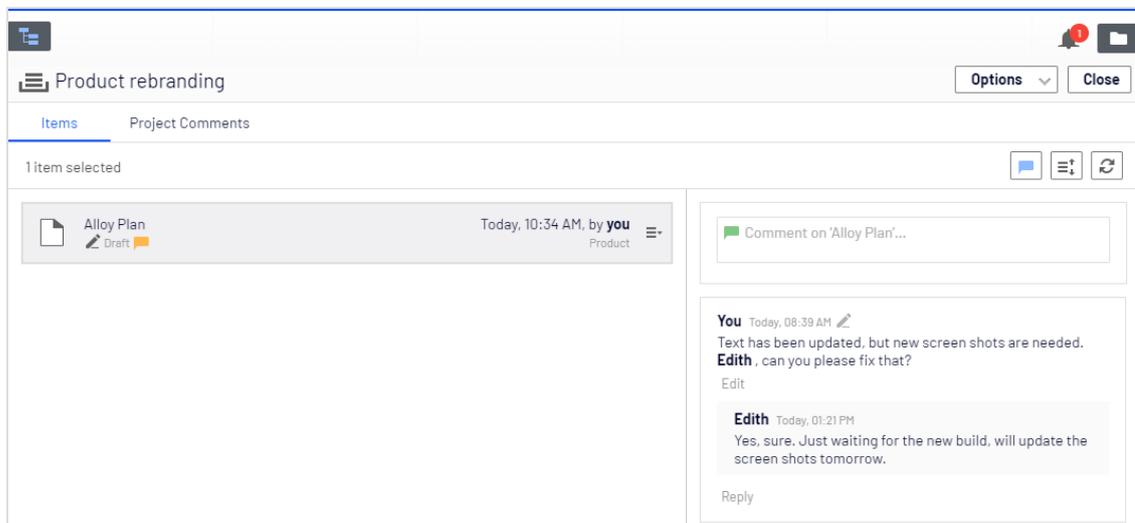


Image: Comments on project item



Replying to a comment

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

Editing a comment or reply

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

Deleting a comment or reply

You cannot delete comments or replies yet.

Managing content

[Content](#) can be pages and blocks in Optimizely CMS, or product content from the catalog on an Optimizely Commerce site. Content can also be [assets](#) such as images and videos, or documents in Word or PDF format. Optimizely has sophisticated version management features, allowing multiple editors to work with draft versions, before [approving and publishing the content](#).

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

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

Managing content tasks:

- [Finding content](#)
- [Translating content](#)
- [Personalizing content](#)
- [Previewing content](#)
- [Comparing versions](#)
- [Structuring the website](#)
- [Deleting and restoring content](#)

You can [preview](#) draft content before publishing, so that you can verify the content before publishing. When working with **personalization**¹, you can preview content the way it appears for different visitor groups. To further limit access to content that is work-in-progress, you can also [set access rights for content from the edit view](#).

¹Adapt content to customized target groups for a more personalized website experience, such as displaying different content to first time and returning visitors. (See visitor groups.)

If you have content in multiple languages on your website, Optimizely has advanced features for managing [translation](#) of content into additional languages, including the use of [fallback and replacement languages](#).

Optimizely Commerce-related content

See [Managing e-commerce-related content](#) in the Optimizely Commerce User Guide, if you have Optimizely Commerce installed.

Optimizing content to improve search

See [Working with content to optimize search](#) in the Optimizely Search & Navigation User Guide, if you have Optimizely Search & Navigation installed.

Working with multiple languages

Many large websites display content in several languages. Optimizely has powerful support for multi-language management, including the possibility to [translate content into a wide range of languages](#), defining [fallback languages](#) for non-translated content, and switching language for the editorial **user interface**.

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

Enabling content languages

Usually a website has a default or master content language set up at the time of installation. In addition to the master language, your website may be set up with multiple other

content languages. An administrator enables languages; see [Managing website languages](#) in the Optimizely Administrator User Guide.

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

- See [Translating content](#) to translate CMS content into different languages.
- You can also use the Languages add-on for translating content.

User interface languages

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



Optimizely Commerce and multiple languages

See [Multi-language management](#) in the Commerce section to work with multiple languages if you have Optimizely Commerce installed.



Optimizely Search & Navigation and multiple languages

See [Optimizing multiple sites and languages](#) to work with multiple languages if you have Optimizely Search & Navigation installed.

Translating content

When an administrator has enabled the desired language, you are ready to translate existing content, or create new content in a specific language. Content here can be, for example, pages or blocks on an Optimizely CMS website, or product-related content on an e-commerce site. When a language is enabled in Optimizely, content properties that are not **global** are available for translation. See also [Global properties](#).

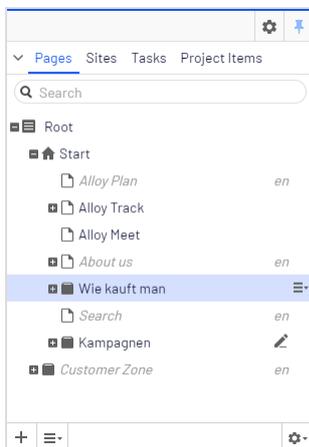
Note: To prevent editors from accidentally creating content in the wrong language, access rights can be set differently for different languages by an administrator. If this is implemented, you can only edit and create content in languages to which you have access.

See also the Optimizely Languages add-on to extend the functionality in Optimizely for translating content into multiple languages.

Switching language and viewing language versions

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

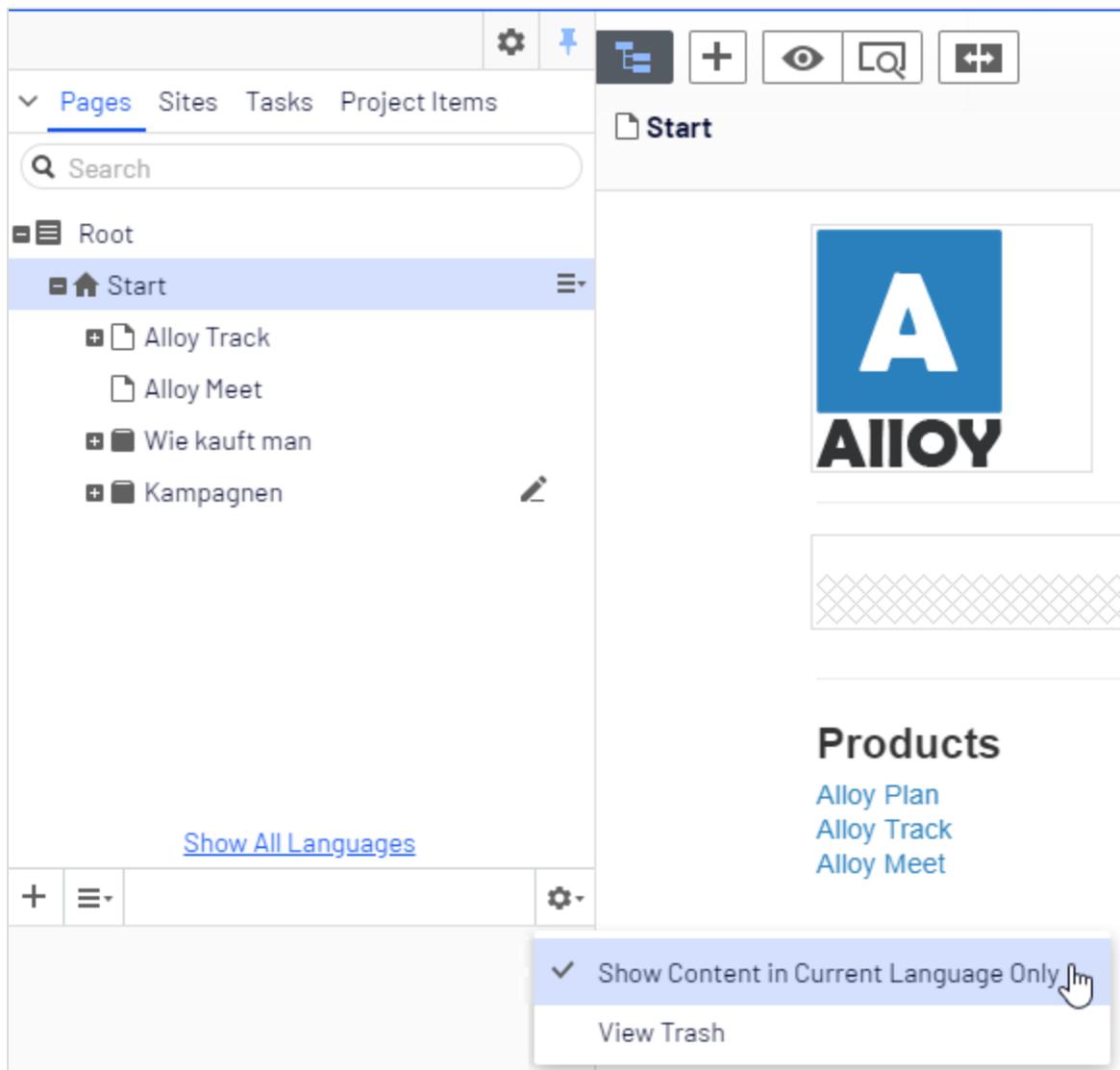
If your **master language**¹ is English and you switch to German, all pages that are not yet translated into German are displayed in italics in the page tree and with the *en* language code for English. Pages that exist in German are displayed in normal font.



To view only pages that were translated, select **Show Content in Current Language Only** from the page tree's **Settings** button. This filters out all other language versions. You can also use this option in the assets pane and in the Versions gadget to view blocks and versions in the current language only.

¹The language in which the first version of content is created.

Note: When you show content in one language only, you can move pages to another location in the page tree structure by drag and drop or copy and paste, but it is not possible to sort pages. Sorting is disabled since sorting in one language, where you may not see all pages, can cause unexpected results in other languages.



Tip: The setting **Show Content in Current Language Only** is enabled for each pane or gadget instance individually. This means that you, for example, can add the [Versions gadget](#) twice and display only the current language in one of the instances and all languages in the other.

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

When you translate content, you can use the [Versions gadget](#) to see the different language versions for the content. By selecting a language in the version list, you can also switch to editing in another language using the switch option in the notification bar.

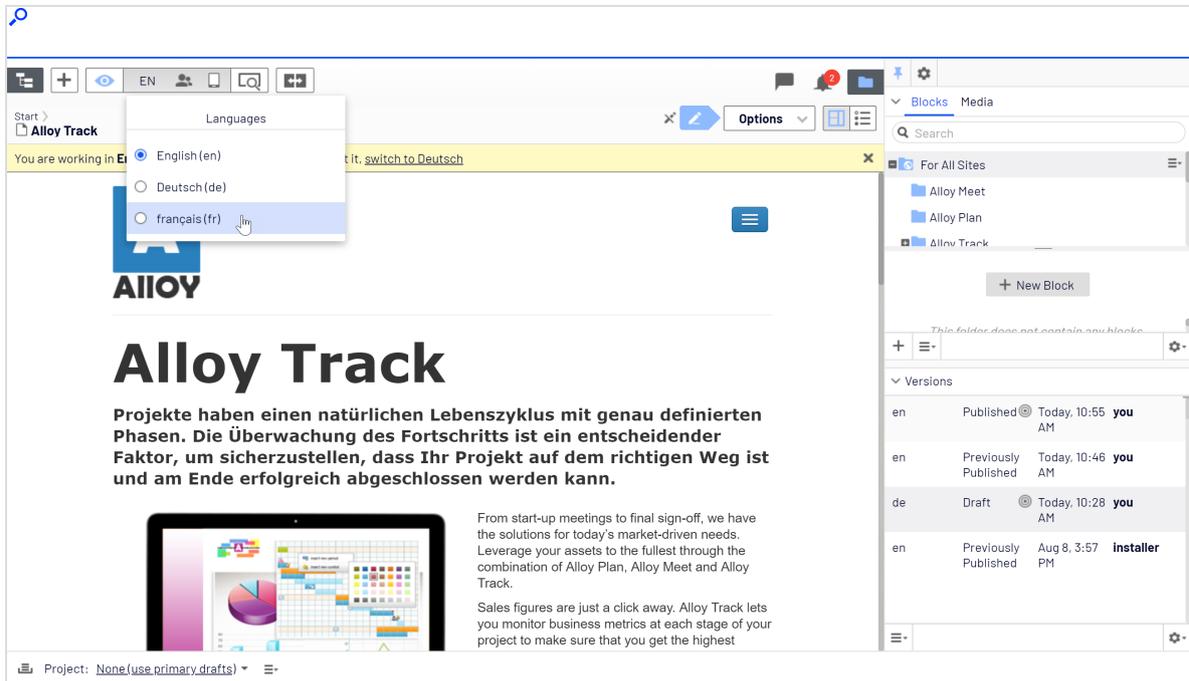
The screenshot shows the Optimizely CMS Editor interface. At the top, a yellow notification bar states: "You are working in English, this content is in Deutsch. To edit it, [switch to Deutsch](#)". The main content area displays the 'Alloy Track' page with a logo, a heading, and a paragraph of text. On the right side, there is a 'Versions' panel showing a list of content versions for different languages and dates.

Language	Status	Date	Author
en	Published	Today, 10:55 AM	you
en	Previously Published	Today, 10:46 AM	you
de	Draft	Today, 10:28 AM	you
en	Previously Published	Aug 8, 3:57 PM	Alicia

You can search for all language versions for some content by typing a keyword in the search field for **Pages** or **Blocks** in the assets pane.

Previewing content in different languages

Using the view settings  in the top menu, you can [preview](#) and edit content in one of the languages that are available for translation on the website.



Deleting language versions

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

Warning: Deleting one or more language versions cannot be undone.

Translating existing content

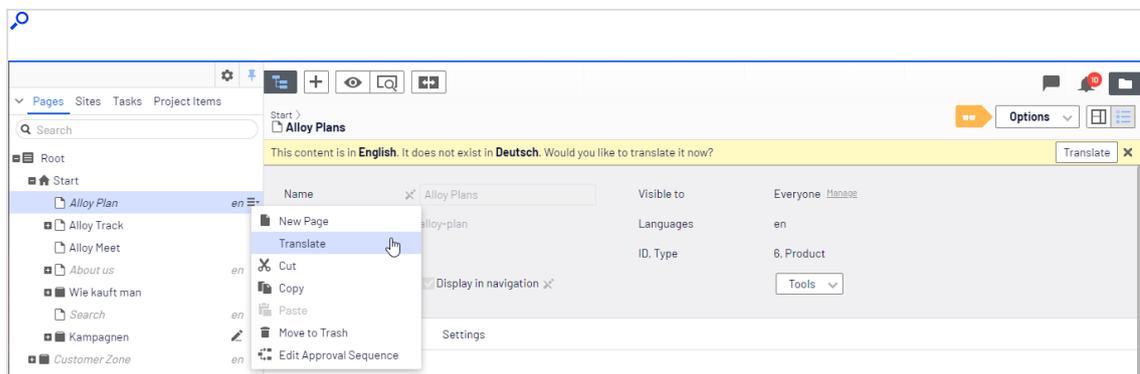
The **Sites** tab displays the languages available for content creation, with the default language for the website at the top. Languages that are enabled on the website but are not enabled for editing, are shown in italics.

Translating a page

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

Do the following to translate a page:

1. Under the **Sites** tab in the navigation pane, select the desired target language for translation. The interface reloads, and you are taken to the **Pages** tab.
2. In the page tree, select the desired page to translate, and then click **Translate** in the notification bar at the top. Or, select **Translate** in the context menu for the page in the page tree.



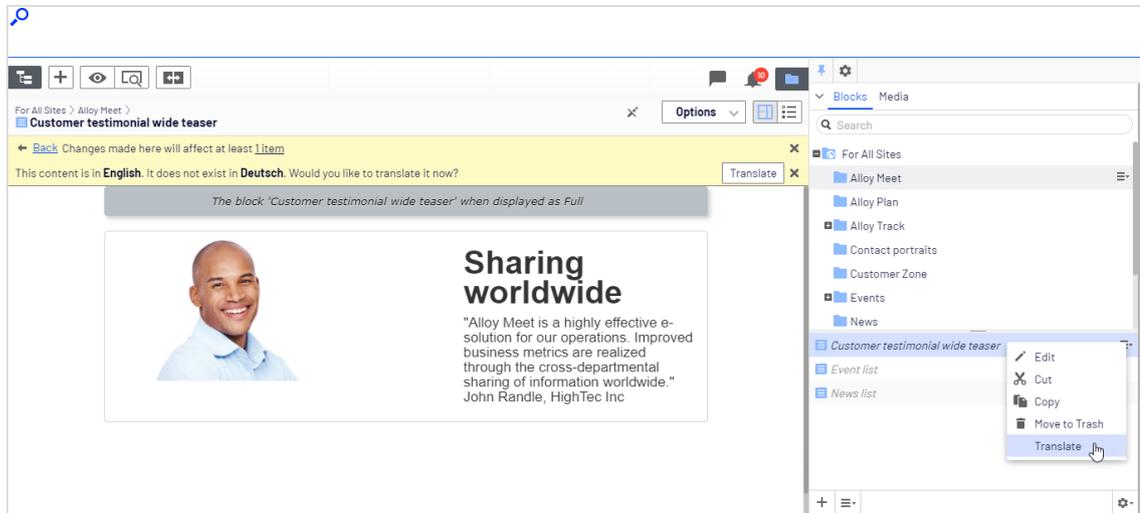
3. You can use the [compare](#) view  to translate in one pane while seeing the original version in the other pane at the same time.
4. Edit the content and follow the content publishing flow to [save and publish](#) the translated page.

Translating a block

You can access language versions for blocks from **Blocks** in the assets pane. By default, all blocks are displayed, including those that are not translated; these are shown in italics. To only see blocks for the chosen language, select **Show Content in Current Language Only**.

To translate a block:

1. Under the **Sites** tab in the navigation pane, select the desired target language for translation, and the interface reloads.
2. Expand the assets pane and select **Blocks**.
3. In the block structure, select the desired block to translate, and then the **Translate** option in the context menu.

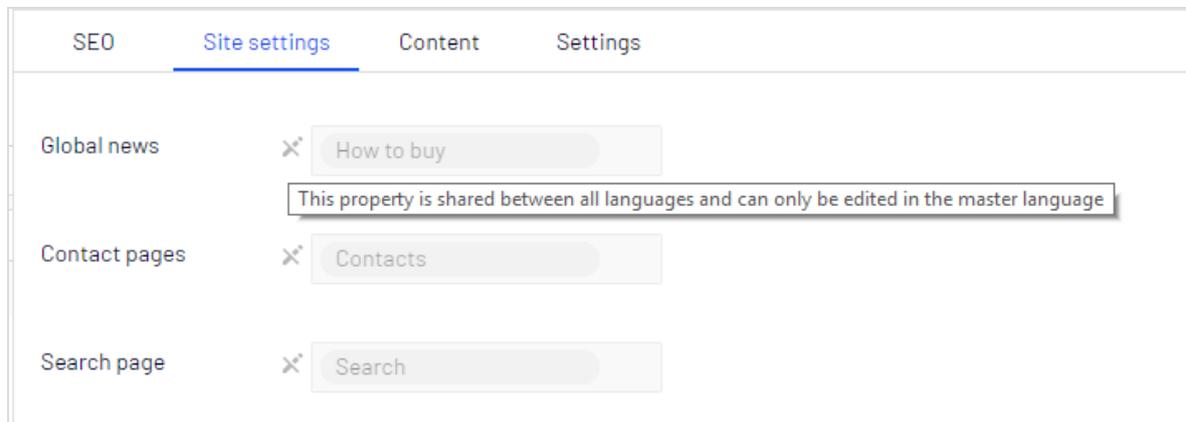


4. You can use the **compare** view  to translate in one pane while seeing the original version in the other pane at the same time.
5. Edit the content and follow the content publishing flow to **save and publish** the translated block.

Global properties

Depending on your implementation, some properties may be globally shared and you can edit them in the **master language**¹. These properties are marked as **non-editable** when editing the content in another language. Switch to the default language if you need to edit these. The default language is usually the first language listed next to **Languages** in the header when editing in the **All Properties** view.

¹The language in which the first version of content is created.



Creating new content in another language

To create content in a language other than the master language, select the desired language under the **Sites** tab. Then select the page branch or folder where you want to create the content, and create a new page or a new block. Add content and follow the content publishing flow to [save and publish](#).

Optimizely Commerce and multiple languages

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

Fallback languages

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

You have the following options:

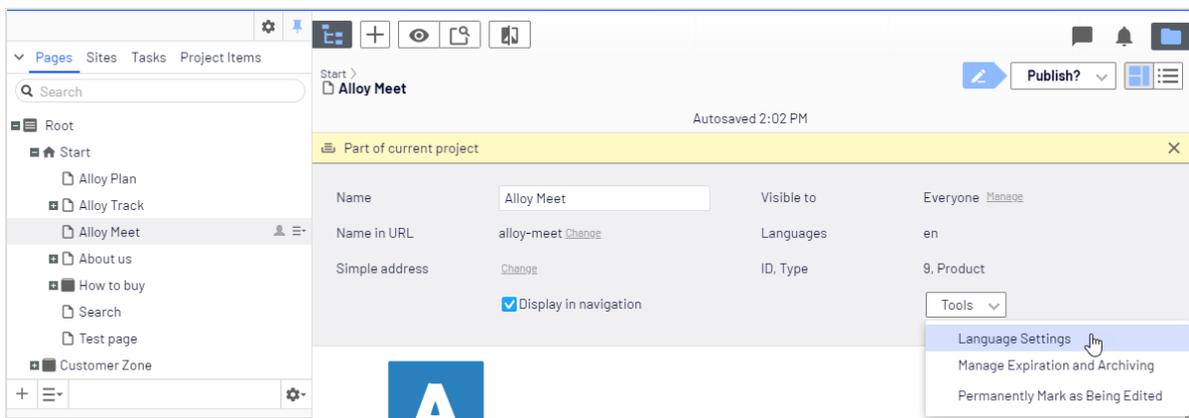
- Unless a fallback or replacement language is defined, content is **invisible** to visitors browsing the website in a language into which content is not translated.
- Define a **fallback** language, in which the content appears until the content is available in the desired language.

- Define a **replacement** language, in which content appears regardless of the language in which the content exists. If you define a replacement language for some content, a fallback language does not apply.

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

Setting fallback and replacement languages

Fallback and replacement languages are defined from the **All Properties** edit view, when editing a page or a block and then selecting **Tools** and **Language Settings**.



Note: Language settings are inherited from the parent page. If you are redefining language settings for a subpage to a parent page with language settings defined, you need to deselect **Inherit settings from the parent page "xxx"** in the **Language Settings** dialog box, to define settings for the subsection.

Example: fallback language

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

fallback language *English* is applied.

✕
Language Settings

norsk
dansk

Change

Settings for Site Visitors

Fallback Languages

Fallback language replaces one language with another, when there are permanent or temporary information gaps for a language. Fallback language will not apply if a replacement language has been set for the pages in the structure.

Visitor Language	Fallback Language 1	Fallback Language 2	Fallback Language 3
English	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>
svenska	<input type="text" value="English"/>	<input type="text" value=""/>	<input type="text" value=""/>
norsk	<input type="text" value="svenska"/>	<input type="text" value="English"/>	<input type="text" value=""/>
dansk	<input type="text" value="svenska"/>	<input type="text" value="English"/>	<input type="text" value=""/>

Save
 Cancel

Example: replacement language

This example shows a multi-language website with a legal information section with content that should be displayed in English. To ensure this, a replacement language is applied for the legal information page branch.

✕
Language Settings

norsk > svenska > English
dansk > svenska > English

 Change

Replacement Languages

Replacement language replaces one language with another, regardless of whether the page has been published in the first language. Replacement language may be useful when, for example, you have started to translate and publish pages for all (or parts) of your website, but do not want to have mixed content until the site has been entirely translated.

Visitor Language	Replacement Language
English	<input type="text" value=""/>
svenska	<input type="text" value="English"/>
norsk	<input type="text" value="English"/>
dansk	<input type="text" value="English"/>

Another scenario for using replacement language is when you have started to translate content on your website, but do not want to have mixed languages until translation is completed. When translation is ready, you simply remove the replacement language.

See also

- [Translating content](#) about translating Optimizely CMS content into different languages.
- [Optimizely Languages in the online user guide](#) about extending the functionality in Optimizely for translating content into multiple languages.



Personalizing with visitor groups

One way you can a digital experience in Optimizely is to create a **visitor group**¹ with criteria for that group. For example, you can design a product banner specifically for first-time **visitors**², or for visitors from a geographic region or market. For information about visitor group criteria, see Administering visitor groups in the CMS Administrator User Guide.

In Optimizely CMS, you can personalize any type of content in the rich-text editor and in a content area; personalize part of a text, an image, or a block in the CMS rich-text editor, or personalize an image, a block or a page in a content area, if you have these in your web pages.

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

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

Applying personalization

In the rich-text editor

1. In Optimizely CMS, open the page for editing, and select the content you want to personalize in the editor area.
2. Click **Personalized Content**  in the editor toolbar.

¹Site visitors with something in common, such as age, geographic location, and so on. Used in the personalization feature of Optimizely CMS. (See Personalizing Content.)

²Someone who visits a website using a web browser. In most cases, a visitor can use public functions and services but cannot create content and has limited access to community content. In an SEO context, visitor means the number of visits to a URL through channels (external referrers), direct arrivals, and internal links. (See also visitor groups.)

3. Select one or more visitor groups from the list.

Personalized Content
✕

Personalization Settings

Select the visitor group(s) that should see this content

No group selected
+

Personalization groups are used to group personalized content for different visitor groups, or no visitor groups.

Include in a personalization group

Pricing
▼

+

As an option, you can display fallback content to visitors not matching a visitor group. To do so, include the fallback content in a personalization group but leave the visitor group field empty.

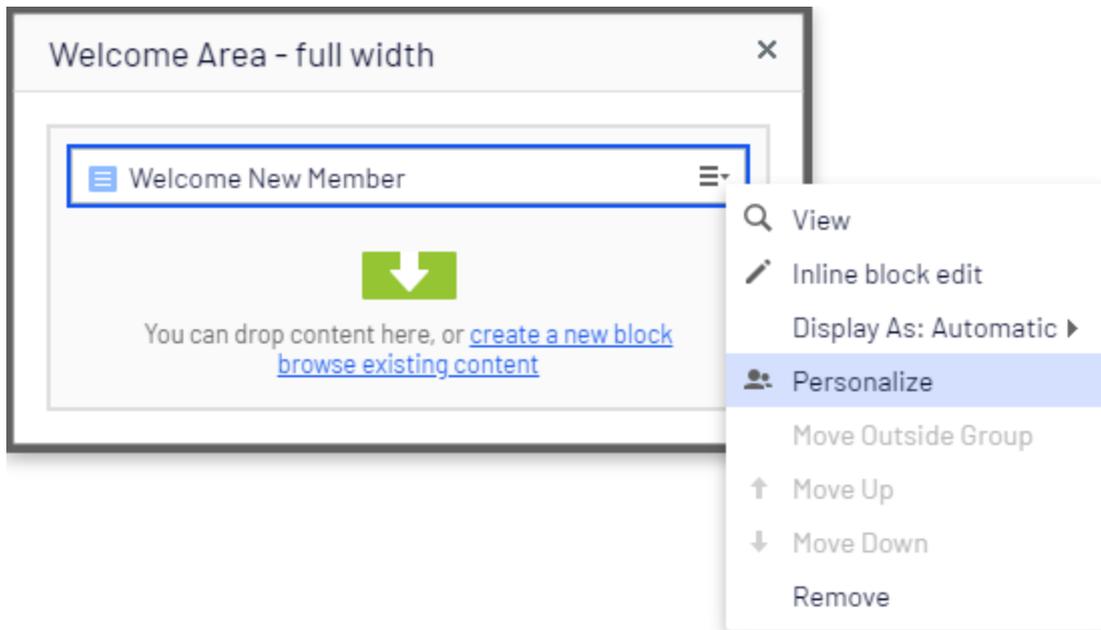
OK
Cancel

4. Preview the personalized content to verify the result. To do this, click  > .

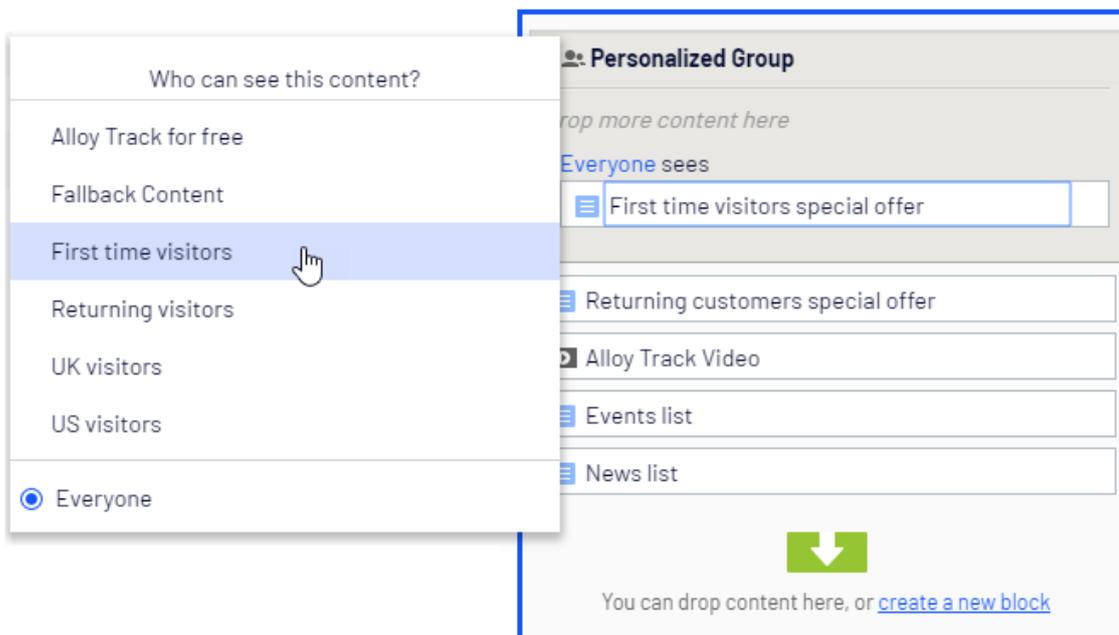
In the content area

1. Open the page for editing, and select the content you want to personalize in the content area.

2. Select **Personalize** from the context menu.



3. Select one or more visitor groups from the list.



4. Preview the personalized content to verify the result. To do this, click  > .

Editing and removing personalization settings

In the rich-text editor

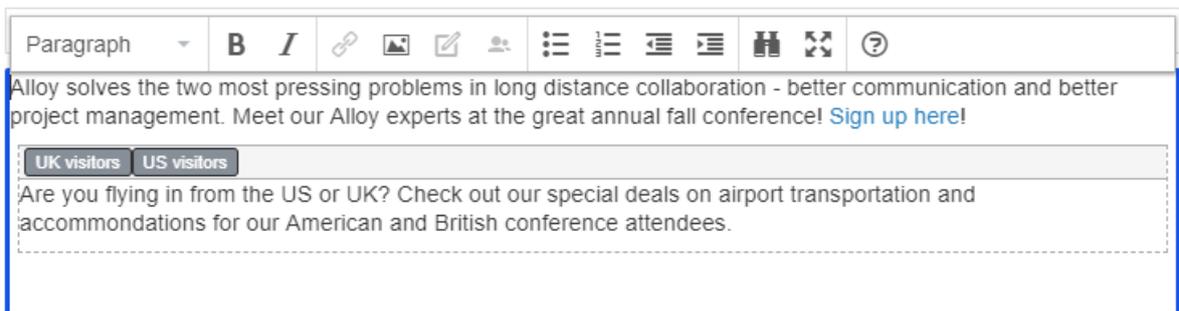
Click **edit** for the personalized content, and update the personalization settings, or select **Remove Personalization**.

In the content area

Expand the desired **Personalized Group** section and click the desired visitor group link to edit the settings. To exclude content from **personalization**¹, drag it outside the group, or select **Move Outside Group** in the context menu.

Example: displaying content to multiple visitor groups without fallback

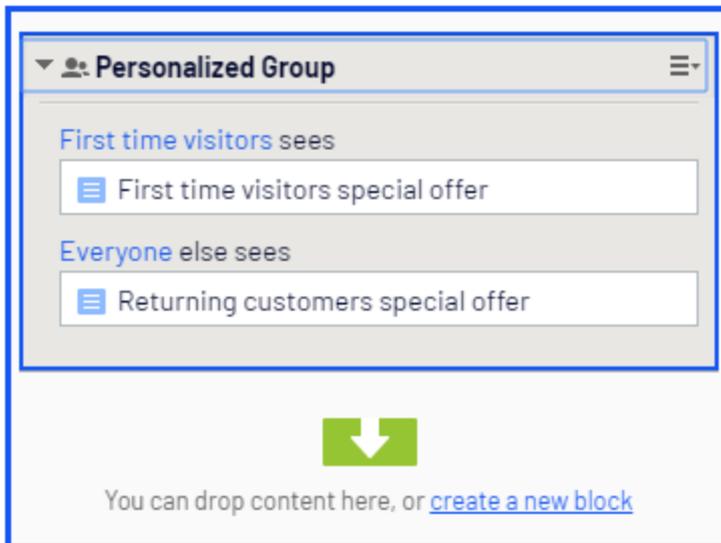
In the rich-text editor



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

In the content area

¹Adapt content to customized target groups for a more personalized website experience, such as displaying different content to first time and returning visitors. (See visitor groups.)



In this example, **Returning visitors** see one block, and **First time visitors** see another. Visitors that do not match any group do not see anything in this content area.

Example: displaying content to multiple visitor groups with fallback

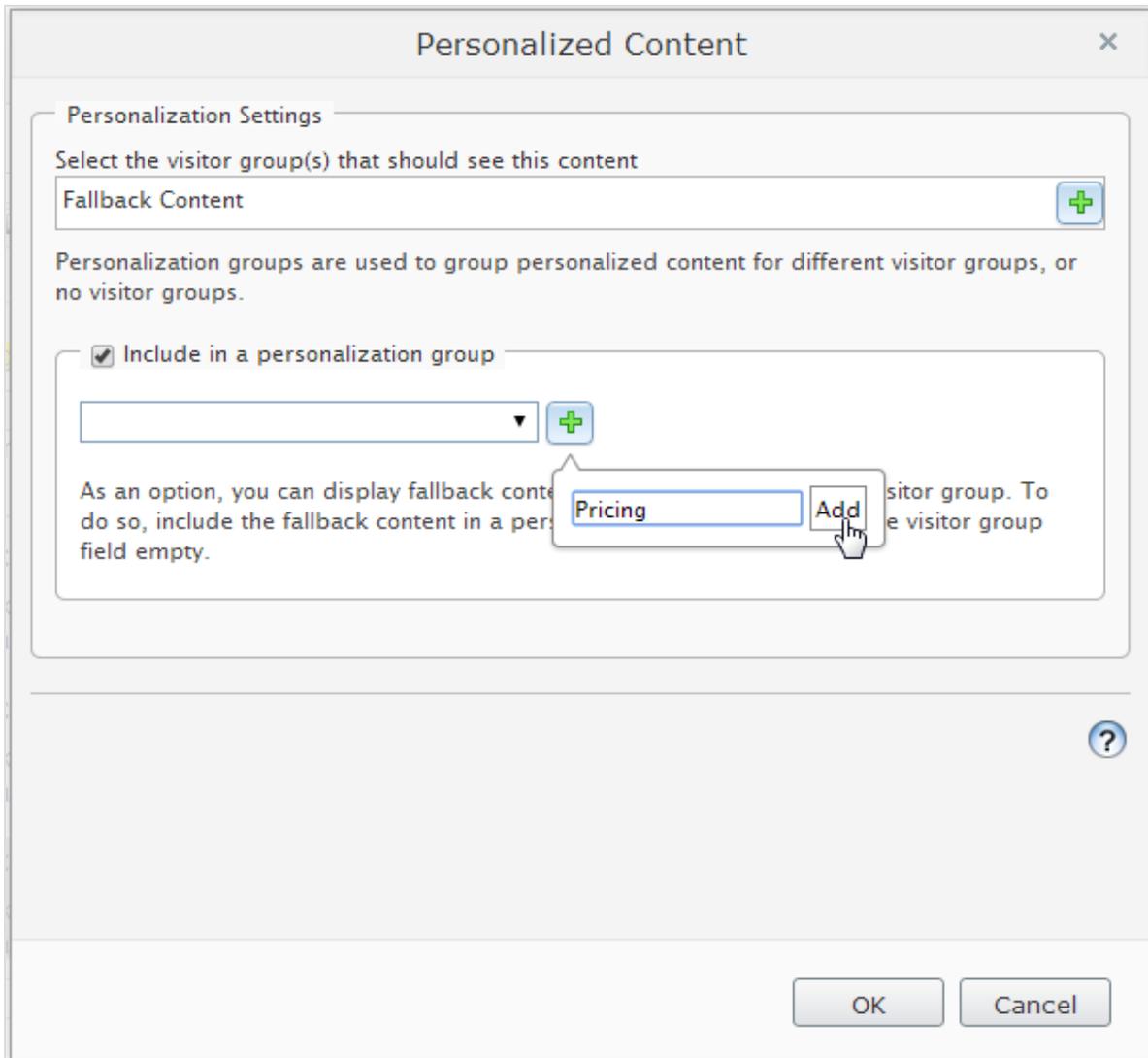
You want to display specific price information to visitors from the UK and US, and other price information to visitors from other countries. To avoid displaying price information twice for visitors from the UK and US, you need to use a personalization group for fallback content.

Note: The order in which the personalized content is placed within a personalization group does not matter, but placing the fallback content at the end makes it easier to follow the personalization flow.

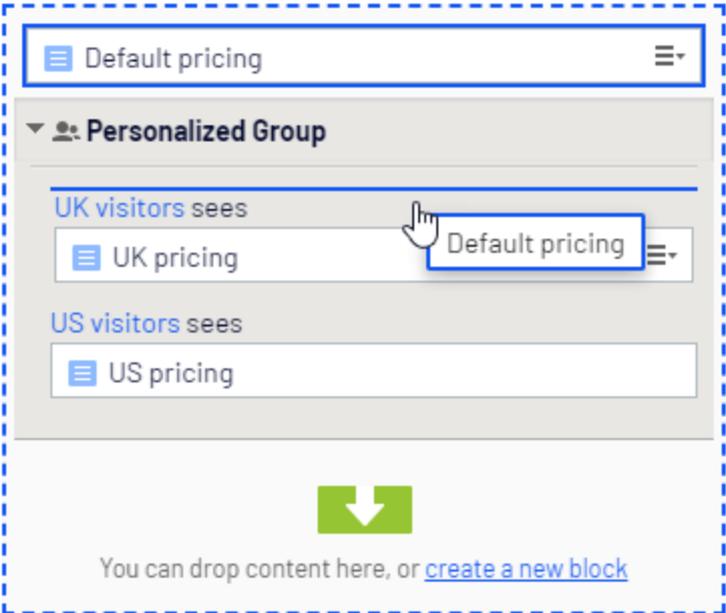
In the rich-text editor

Select the **fallback**¹ price information text and personalize it without selecting a visitor group. Instead create a *Pricing* personalization group and apply this.

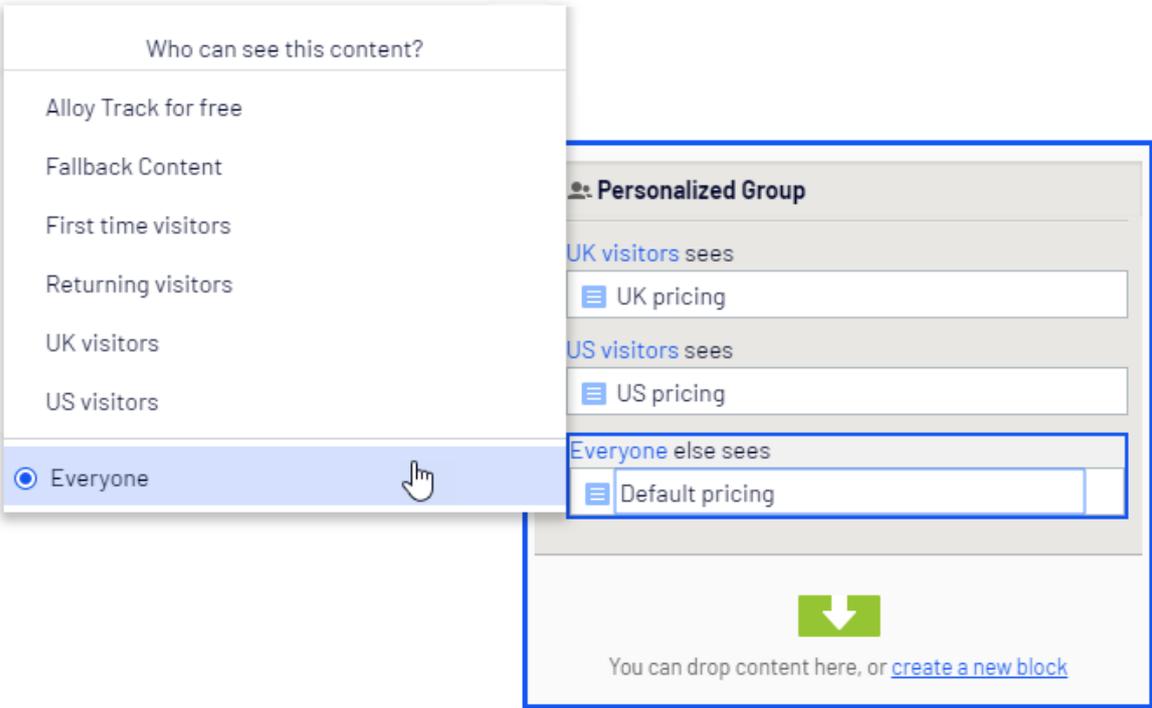
¹the default action if no criteria is met; without a fallback, no action occurs.



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



Personalize each block within the group by applying the appropriate visitor group. Use the **Everyone** option to display the fallback content displayed to visitors not matching any visitor group.



Search engine indexation and visitor groups

Search engines crawl your website to index your content. So what if your content is personalized through visitor groups, what will the search engine crawler see? It all depends on how the visitor group is assessed at the point of crawl. If you have a visitor group *Visitors from the UK*, the crawler will index the content personalized for UK if the crawler has an IP that is identified as being in the United Kingdom. Otherwise that content is not indexed.

Another example is where a date/time visitor group criteria has been applied. If you have a *Weekend only* visitor group, then the content will be indexed if the crawler comes along at the weekend, otherwise not.

It is good practice to have *Everyone* content in a group, if it is important that something is shown (or crawled) in a area of the page.

Providing access to content using visitor groups

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



Personalizing Commerce content with visitor groups

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



Personalizing with connector add-ons and visitor groups

You can also personalize content through marketing automation connectors, if you have Marketo installed on your website, for example. See examples in the following video tutorials.

 Video tutorial: [Personalizing content with Optimizely and the Eloqua database.](#) (2:15 minutes)

 Video tutorial: [Personalizing content with Optimizely and HubSpot.](#) (2:34 minutes)

 Video tutorial: [Personalizing content with Optimizely and Marketo.](#) (2:56 minutes)

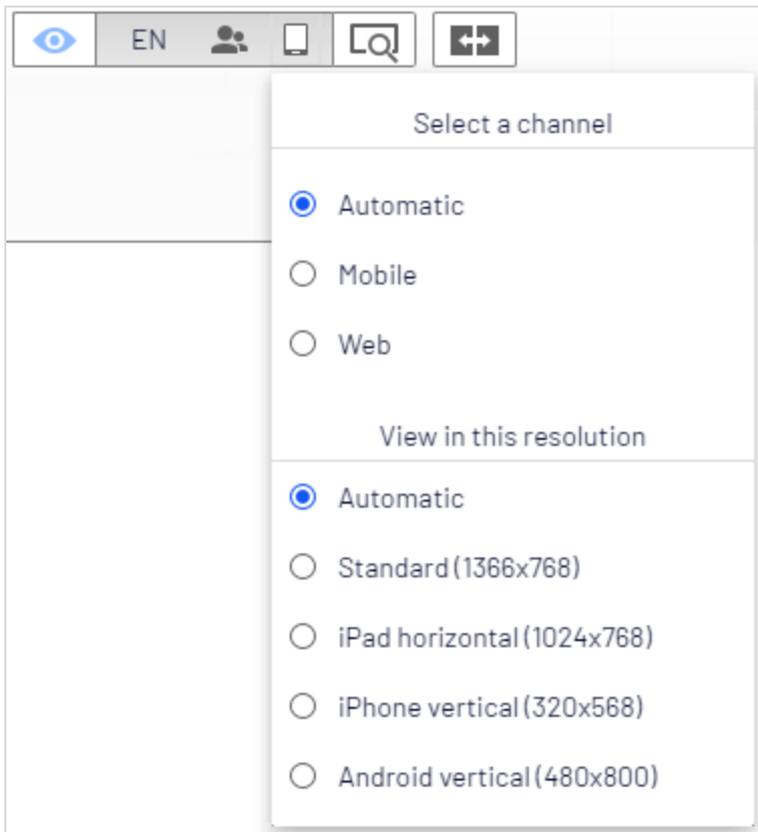
Previewing content

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

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

- **You are not using projects or you are using projects via the projects gadget.** The preview option displays the published version of each page, or if there is a newer draft, the primary draft version. You may have a draft version in a project that is not set to primary draft, in which case the preview does not display the project version. Use the **View settings > Projects** option (see [table below](#) for details) to view your website as if the items included in a project were published.
- **You are using the projects feature.** The preview option displays the active project. If no project is set as active, it displays the published version of each page, or if there is a newer

draft, the primary draft version.



Use **View settings**  to preview content with the following options:

Options	Button	Description
Languages		Select a language to view the content as visitors using this language will see it.
Visitor groups		View the content as the selected visitor group will see it.
Media channels		Select a channel and/or a resolution to see the content as it will appear with the selected settings. The options are customized for your website.

Options	Button	Description
<p>Projects</p>		<p>Navigate and view the contents of a project to verify the display before publishing.</p> <p>Note: This option is not available if the projects feature is enabled. In that case, the preview button displays the active project. To preview another project, you need to change the active project.</p>

Note: You can combine previewing with the view setting options to display French content (for example) as visitors using a mobile device and with German as preferred language will see it.



Comparing versions

In the compare view in Optimizely you can compare content and properties between specific versions to see what has changed. When you compare content, the [On-page edit view](#) displays two page versions side-by-side. Properties are compared in the [All properties edit view](#).



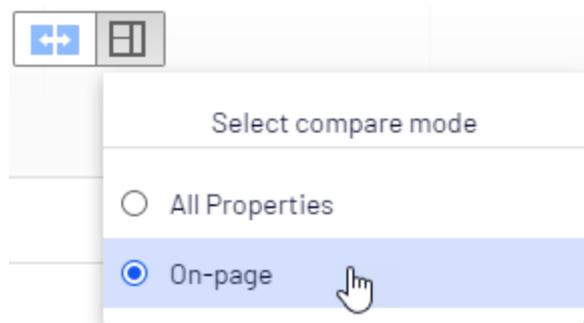
Toggle the **Compare different versions** button on the toolbar to turn the compare view on and off.



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



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



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

Comparing content

When you compare content, the [On-page edit view](#) shows two versions side-by-side. You can scroll and resize the panes.

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

The screenshot shows the Alloy Tracking content management system. At the top, there's a navigation bar with 'Start' and 'Alloy Track' tabs. Below that, a comparison bar indicates the current view is comparing a 'Previously Published (en)' version from 'Aug 8, 3:57 PM by Alicia' with the 'Published (en)' version from 'Today, 10:46 AM by you'. A language selector is set to 'All Languages'.

Language	Status	Saved	By
<input type="checkbox"/> en	Published	Today, 10:46 AM	you
<input type="checkbox"/> de	Draft	Today, 10:28 AM	you
<input checked="" type="checkbox"/> en	Previously Published	Aug 8, 3:57 PM	Alicia

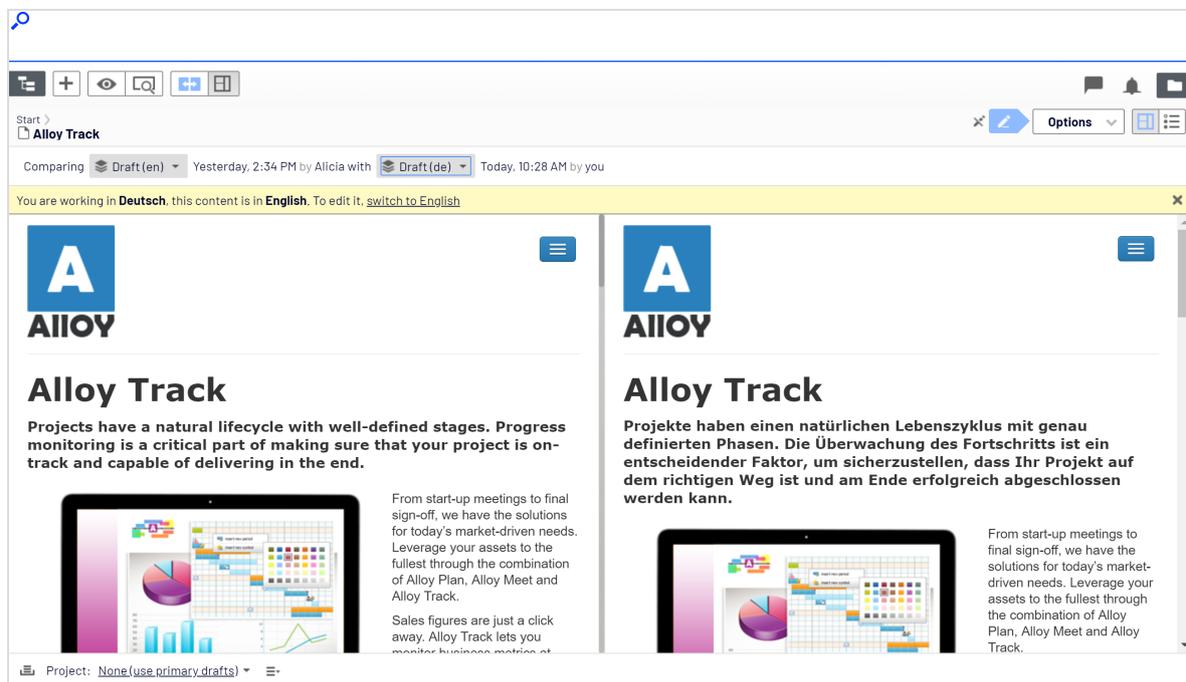
The main content area displays a live preview of the 'Alloy Tracking' page. The page features a header with the title 'Alloy Tracking' and a sub-header: 'Projects have a natural lifecycle with well-defined stages. Progress monitoring is a critical part of making sure that your project is on-track and capable of delivering in the end.' Below this is a large image of a laptop displaying a dashboard with various charts and graphs. To the right of the image, there is a 'Contact us' section with the text 'Are you interested in our products?'.

At the bottom of the interface, there is a project selector showing 'Project: None (use primary drafts)'.

Comparing language versions when translating content

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

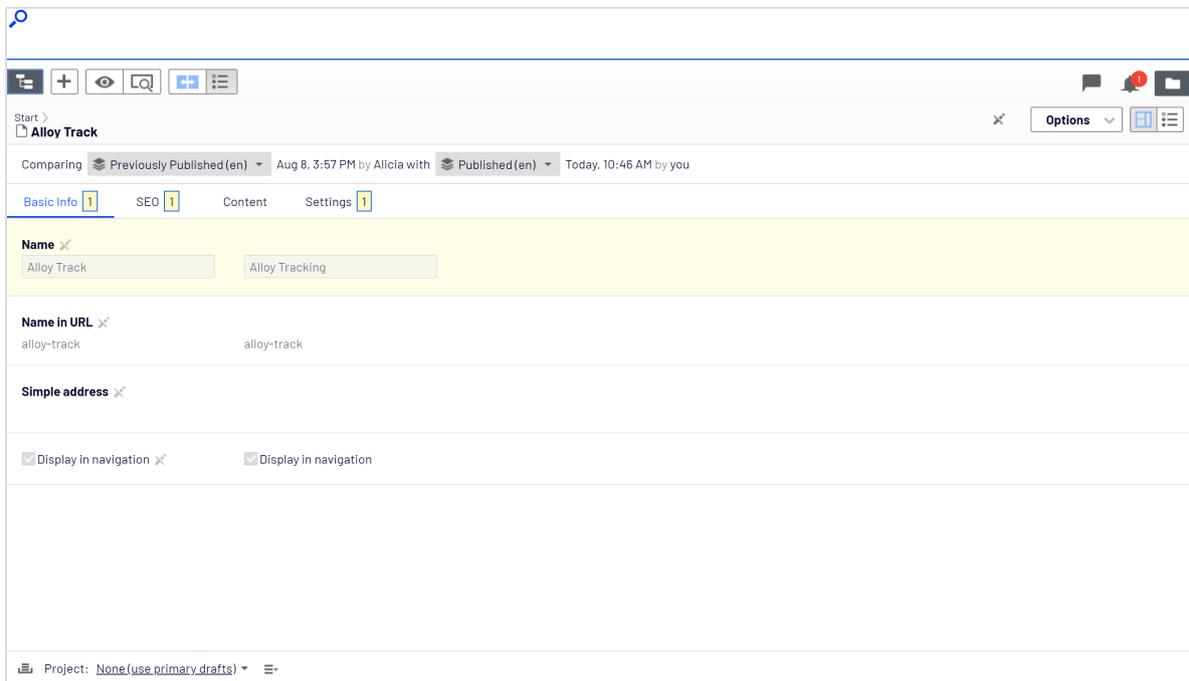
By comparing versions made in [different languages](#), you can translate the content in the left pane side-by-side with the published version of the current language. You can also jump between languages to edit by selecting the current language in the version list of the left pane, and then switch language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



Comparing properties

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

In the compare properties view, the two property versions appear side-by-side. The latest version of the property is shown first, to the left of or above the older version of the property. All properties that differ between the two versions are highlighted with a yellow background.



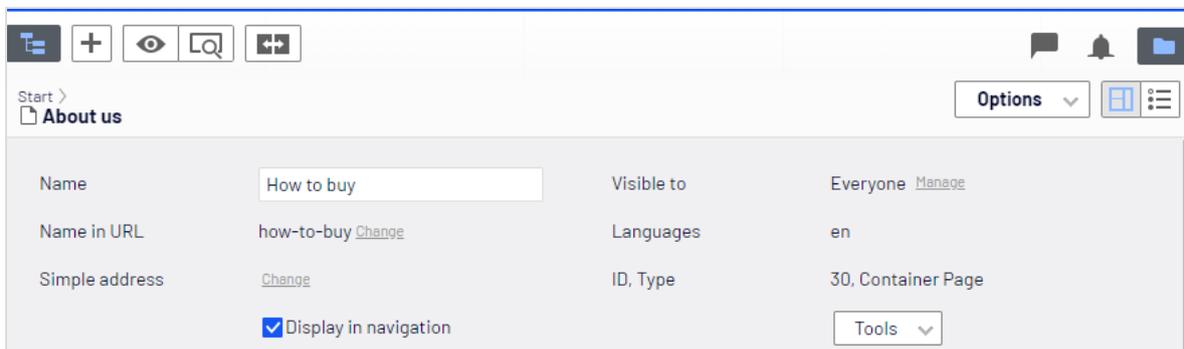
You can edit the latest version of the properties, and if you decide that you prefer the older version to the newer, you can click **Copy** and the older version is used in the newer version also. When you edit a published property, a new draft appears in the version list.

Setting access rights from edit view

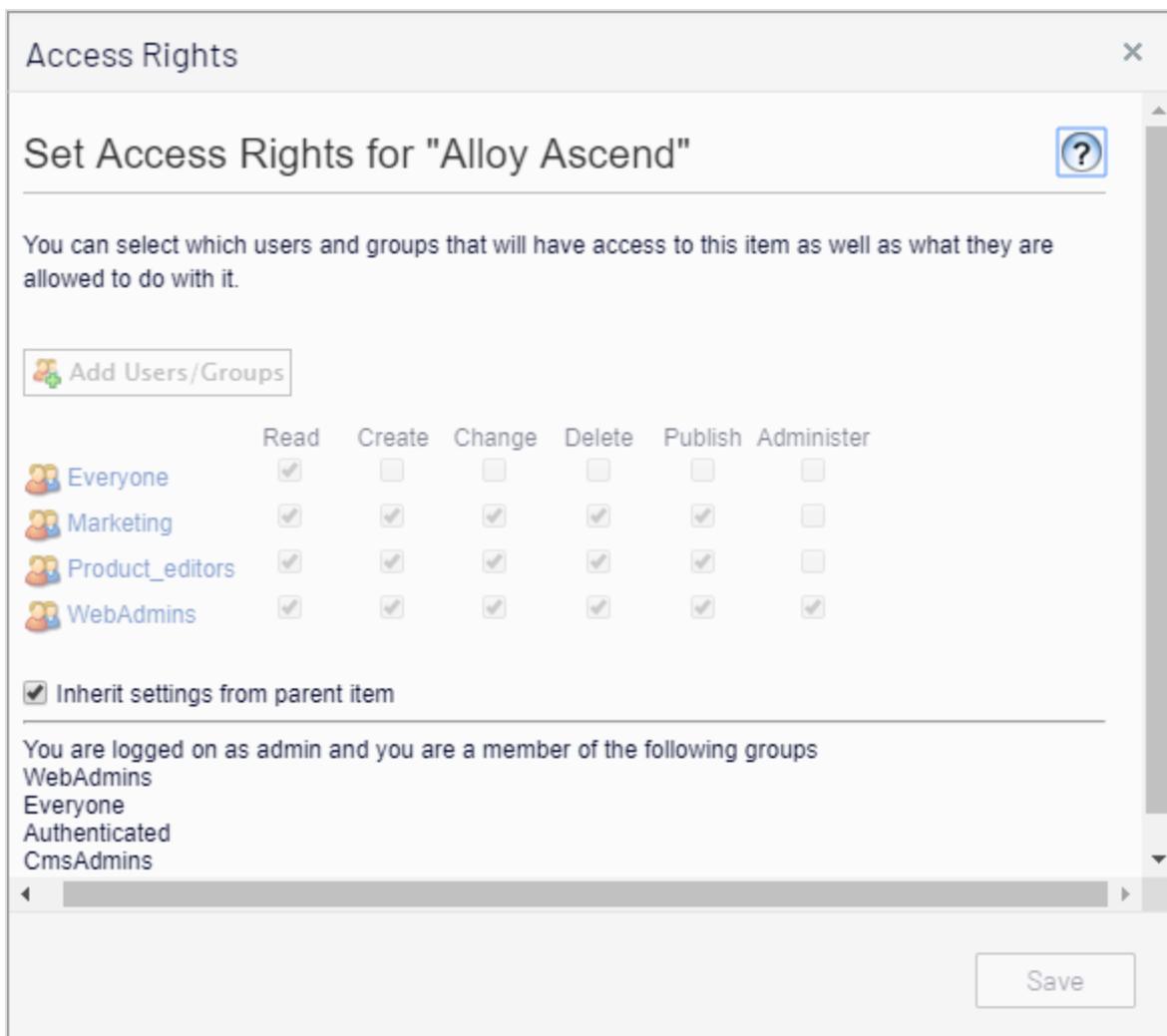
Administrators generally manage website access rights from the administration view. However, if you have **administer** rights, you can set access rights for a single page or a block from the edit view. This is useful when you need to publish an item to verify the final result, but you do not want it to be publicly visible.

Note: If sub items are set to **Inherit settings from parent item**, these items are also affected by your change.

To set access rights, open the item in the [All properties edit view](#) (or scroll to the top of the page in the on-page edit view). The **Visible to** option displays **Everyone** for content that is publicly available on the website, and **Restricted** if access limitations apply.



Click **Manage** to change the settings in the **Access Rights** dialog box:



If access rights are inherited from the parent page, clear **Inherit access rights from parent item**, and click **Add Users/Groups** to define new access rights. Add access rights as desired and save the settings.

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

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

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

Structuring the website

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

Page tree

By hovering over a page in the tree structure, information about the page appears, such as ID and [page type](#). A set of page tree symbols provides additional information about the structure. Note that some of these icons are only displayed for the first draft version of a page, before any published version exists.

-  The root page.
-  Start page.
-  Published page. See [Working with versions](#).
-  Page that links to another page on the same website. See **Shortcut to page in Optimizely CMS** under [Shortcut](#) in [Working in All properties editing view](#).

-  Page that links to an external website or a specific address. See **Shortcut to page on another website** under **Shortcut** in **Working in All properties editing view**.
-  Page containing a shortcut that is not linked anywhere; it only displays the text and is used to create a heading with no link in the menu. See **No shortcut, display text only** under **Shortcut** in **Working in All properties editing view**.
-  Page that fetches and displays content from another page on the same website. See **Fetch content from page in Optimizely CMS** under **Shortcut** in **Working in All properties editing view**.
-  Container page used for storing other pages; not visible on the website.
-  Draft of a new page; not visible on the website yet. See **Working with versions**.
-  New page scheduled for publishing; not visible on the website yet. See **Working with versions**.
-  Expired page; not visible on the website anymore. See **Working with versions**.
-  Page that is set to **Ready to Publish**. See **Working with versions**.
-  Page that is set to **Rejected**. See **Working with versions**.
-  Page is currently **In review** and must be reviewed and approved before it can be published. See **Content approvals**.
-  Previously published page; not visible on the website anymore. See **Working with versions**.
-  Page locked for editing for the logged-in user.
-  Page being edited by another user. You can see who by hovering your mouse over the icon.
-  Published page. **Note:** This icon appears for project items; not in the Pages navigation pane. See **The projects feature**.
-  You do not have the rights to publish this item or the specific item version does not exist anymore. **Note:** This icon appears for project items; not in the Pages navigation pane. See **The projects feature**.

Note: Your website might be customized with other symbols implemented by the partner developer.

Moving, copying and removing pages

Moving a page

Use drag and drop to move a page, or select **Cut** in the context menu for the page you want to move, and select **Paste** for the destination page. You can also move pages by using the keyboard commands CTRL+X for cut (on Mac: CMD+X), and CTRL+V for paste (on Mac: CMD+V).

Note: When you move a page, internal links are redirected to the new location and are not broken. However, any external links pointing to the moved page will be broken.

Copying a page

Press CTRL (or on Mac: Option) on your keyboard and drag and drop to copy a page, or select **Copy** in the context menu for the page you want to copy, and then select **Paste** for the destination page. You can also copy pages by using the keyboard commands CTRL+C for copy (on Mac: CMD+C), and CTRL+V for paste (on Mac: CMD+V).

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

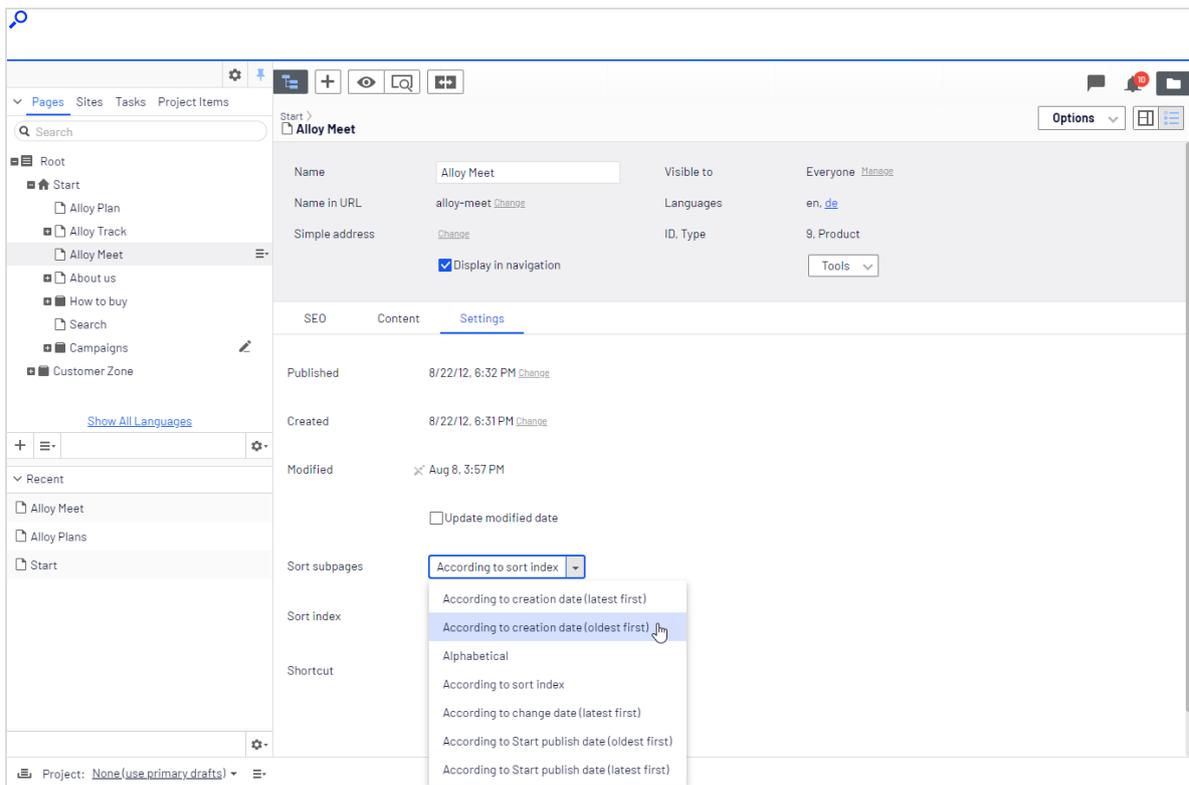
Note: When you copy and paste a page under the same node, the **Name in URL** property of the copied page is typically named **Name in URL1**, which you need to change after copying.

Removing content

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

Sorting page order in menus

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



The sort order is set for the parent page of a branch, and is inherited by the subpages:

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

Sorting according to sort index

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

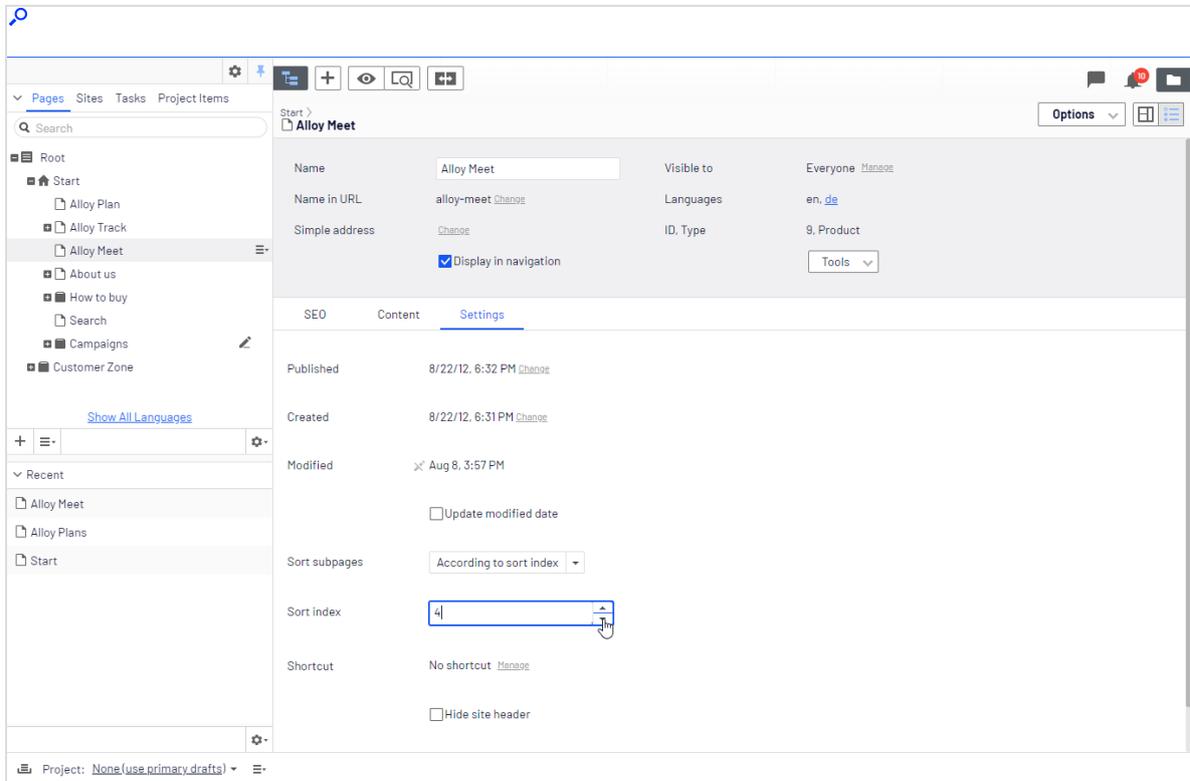
Change the sort order of pages by dragging the page and dropping it where you want it in the tree structure. Sorting pages with drag and drop is only of interest for branches that are sorted with sort index.

- If you move a page into a branch that is not sorted according to sort index, you get prompted to move the page and at the same time apply sort index as sort order for that branch. Confirm with **OK**. When you drag a page into a new position in a page tree branch, the sort index is automatically recalculated to fit the sort order of that branch.
- If you drop a page under a different parent page (with sort index set as sort order), the page is first moved or copied, and then sorted. The page remains in the tree in the position where it was first dropped.

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

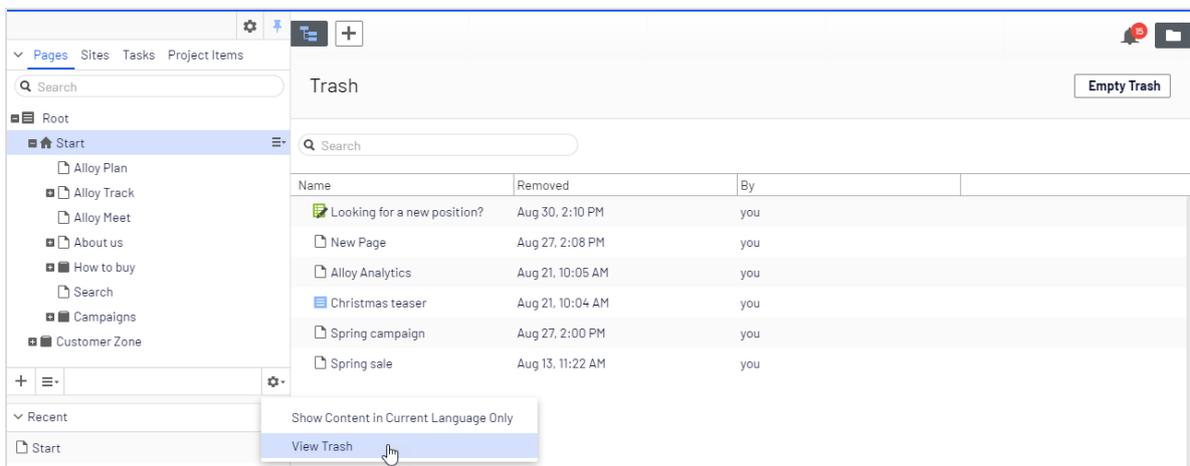
Sorting according to sort index manually

You can set the sort index manually for each child page. Open the page for editing, select the **Settings** tab and change the number in the **Sort index** box. The sort index number must be an integer, but there are no other restrictions. Work with whole tens or hundreds to insert additional pages in between existing ones in the structure. Publish the page to apply all changes to the structure.



Deleting and restoring content

Optimizely has advanced support for restoring deleted content such as pages, blocks, folders and media files. When you remove content, you move it to trash; you do not delete it. From there, you can restore the content or permanently delete it.

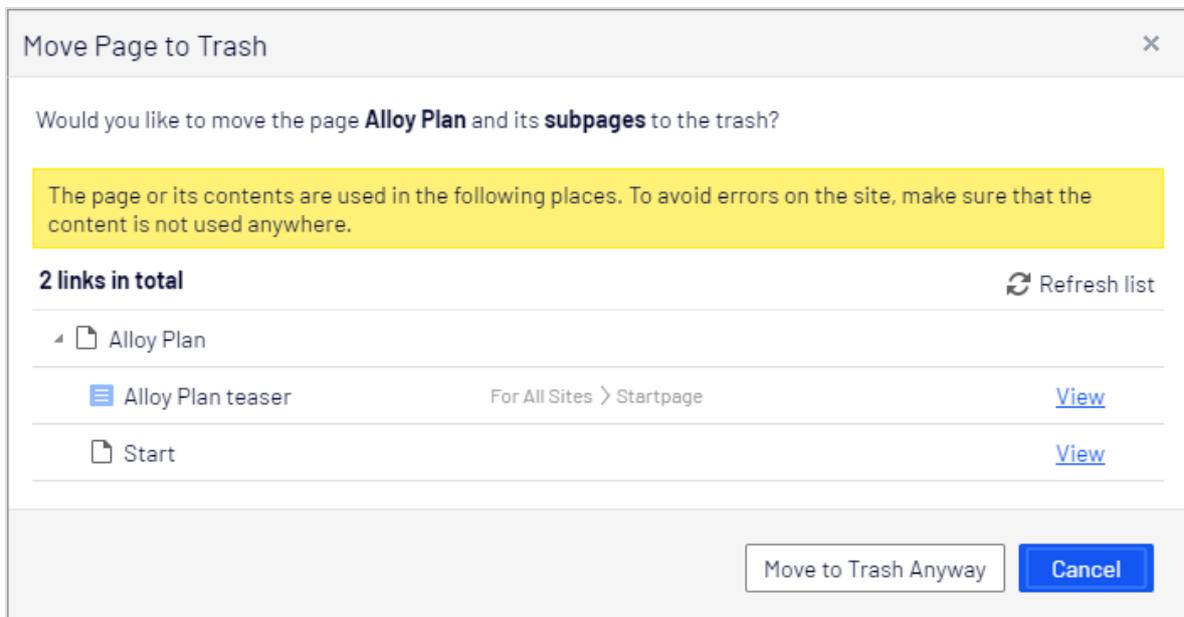


Note: Optimizely Commerce does not support trash management when deleting catalog entries.

Moving content to trash

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

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



Note: Content versions are not supported by trash management. So, when deleting a version in the [versions gadget](#), the version is permanently deleted.

Restoring content

Select **View Trash** from the pane settings in the navigation or assets pane. Hover over the desired content item in the list and click **Restore**. The content is restored to its original place and republished. You must restore content to edit it.



Deleting content permanently

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

If you want to delete just one single item, hover over the item and click **Delete**. Note that if that single item has children, these children will also be deleted permanently.

Working with versions

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

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



Video tutorial: [Publishing content](#) (4:18 minutes)

See also: [Controlling the publishing process](#).

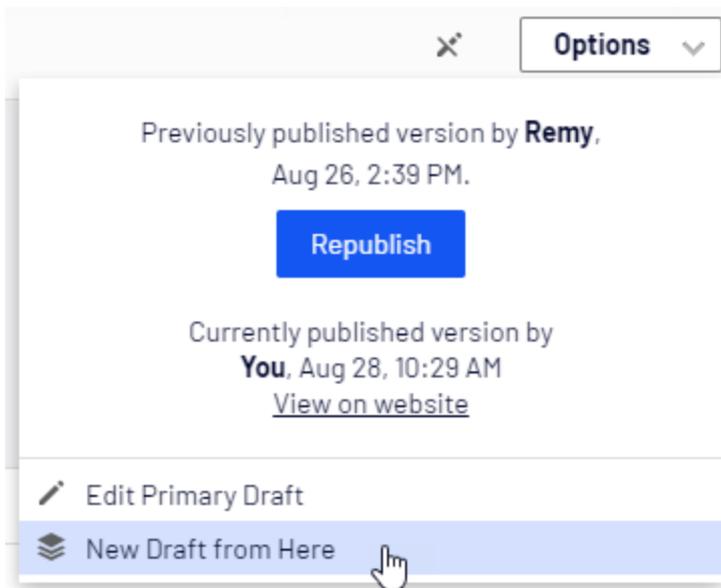
Publishing actions

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

Creating drafts and autosaving

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

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



Undoing and reverting to published

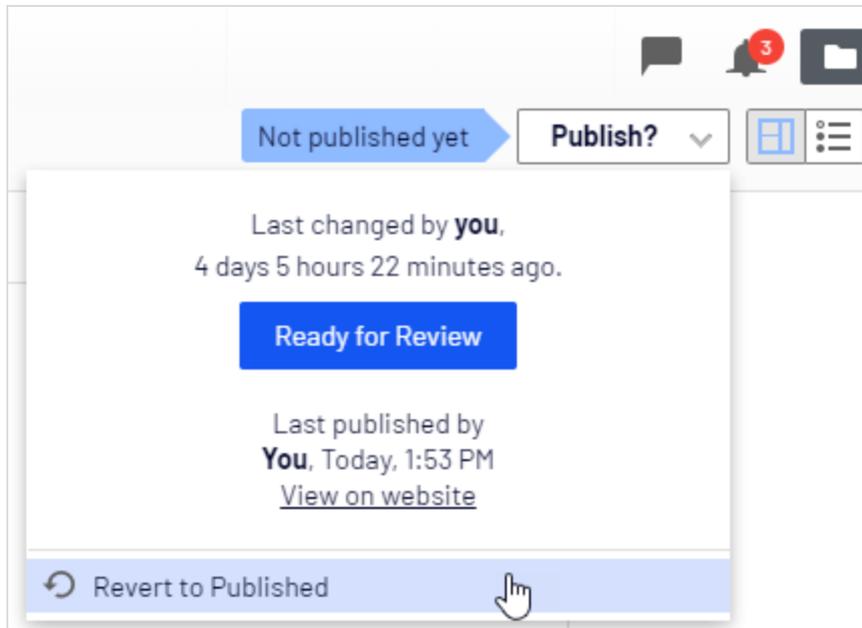
While editing, clicking the **Undo** option in the [page information area](#) lets you undo changes to content that was previously autosaved.



- Select **Undo** to discard the changes done since the last autosave.

Note: You can only undo changes you have made during the current editing session. As soon as you move to another page, close the browser, log out, and so on, the history of actions that can be undone is emptied.

- Select **Redo** if you discarded your changes through **Undo** and want to take them back again.
- Select **Revert to Published** to go back to the latest published version, if the content was previously published. Note that this deletes your current draft and you need Delete access rights for this option. It is also available on the Publish menu.



Previewing and comparing

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

You can also compare different content versions by using the **Compare version** option in the top toolbar; see [Comparing versions](#).

Publishing

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

You can also republish on older version of a page, see [Managing versions](#).

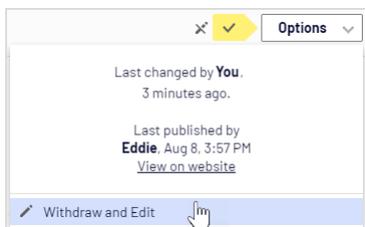
If you want to publish the page at a later time, see [Scheduling for later publishing](#).

Publishing for different time zones

The time for publishing is determined by the local time zone of the editor who publishes or schedules a page. This means that if you are working as an editor in London, UK, and you want to publish page A at 8 AM New York time and page B at 8 AM Tokyo time, you need to find out what the corresponding time is in London. In this example, you would have to publish page A at 1 PM and page B at midnight UK time.

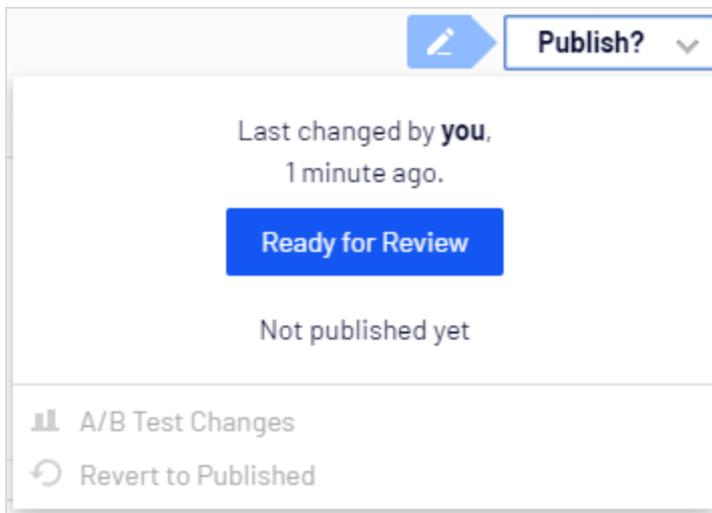
Setting Ready to Publish

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



Setting Ready for Review

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



Approving content

If you are an appointed reviewer for a content item, you can **approve** changes for the content item when it is in status **Ready for Review** and at the approval step where you have been set as reviewer. You can also decide to decline the changes, in which case the content version status is set to **Rejected**. This does not mean that the latest changes disappear, only that the content needs to be edited and reviewed again before it can be approved and published. You can monitor content status and related tasks under [Tasks in edit view](#).

If you have Administer rights to the content item, you can also approve the entire approval sequence and also cancel the review request.

See [Content approvals](#) for more information.

Image: Dialog box without **Administer** rights

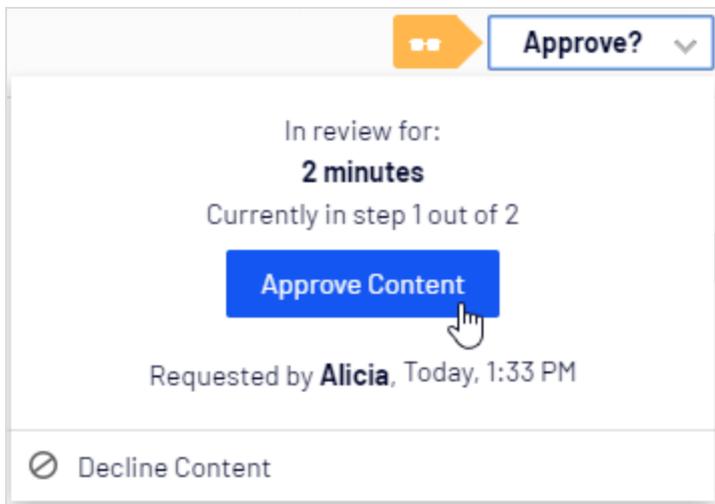
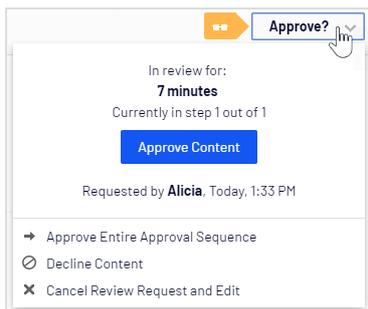


Image: Dialog box with **Administer** rights

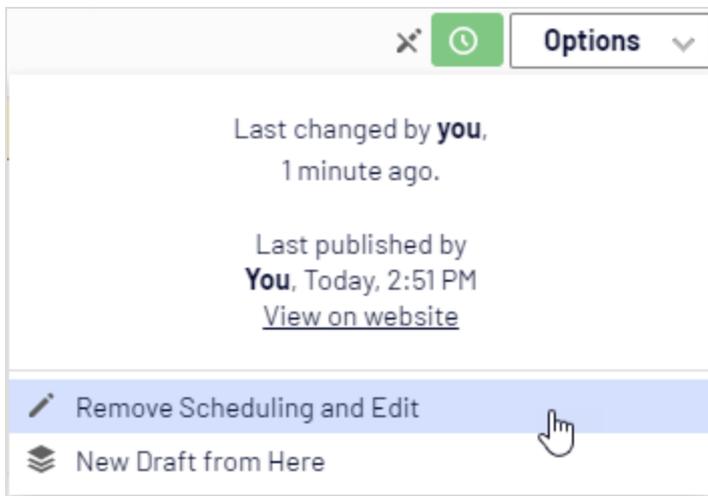


Scheduling for later publishing

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

Removing scheduling and creating new drafts

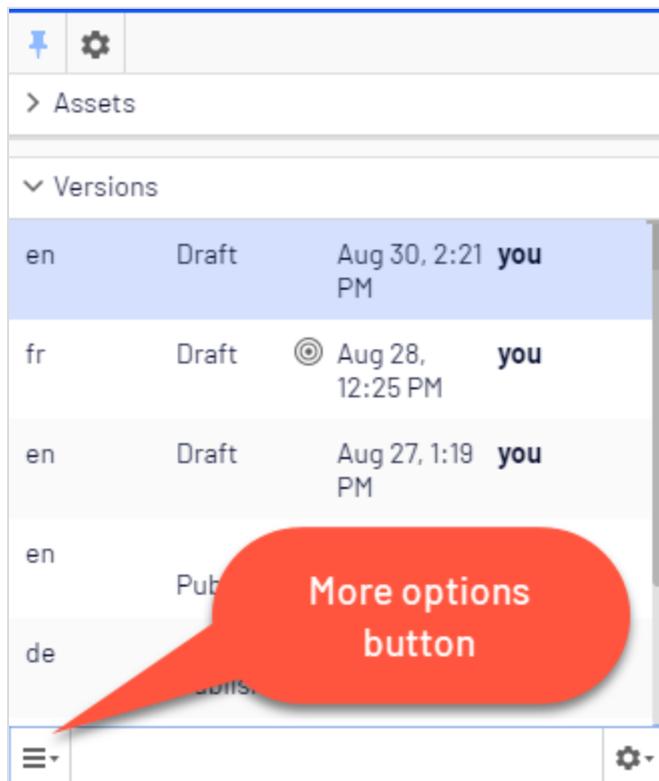
Content that is scheduled for publishing, is locked for editing. Select the **Remove Scheduling and Edit** option to interrupt the scheduled publishing and continue editing the selected version.



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

Managing versions

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



Assets				
Versions				
en	Draft		Aug 30, 2:21 PM	you
fr	Draft	🕒	Aug 28, 12:25 PM	you
en	Draft		Aug 27, 1:19 PM	you
en	Pub			
de				

Click the column headers to sort the version list according to language, status and more.

Note: You need to add the versions gadget to the navigation or assets pane to see the version list.

Viewing versions

Content can have the following status in the version list:

- **Draft.** Content that is a work-in-progress and is not yet subject to any publishing actions.
- **Published.** The most recently published version and the one publicly displayed. Only one published version can exist.
- **In review.** Content must be approved before it can be published. See [Content approvals](#).
- **Previously Published.** One or more versions that were published before the latest published version.

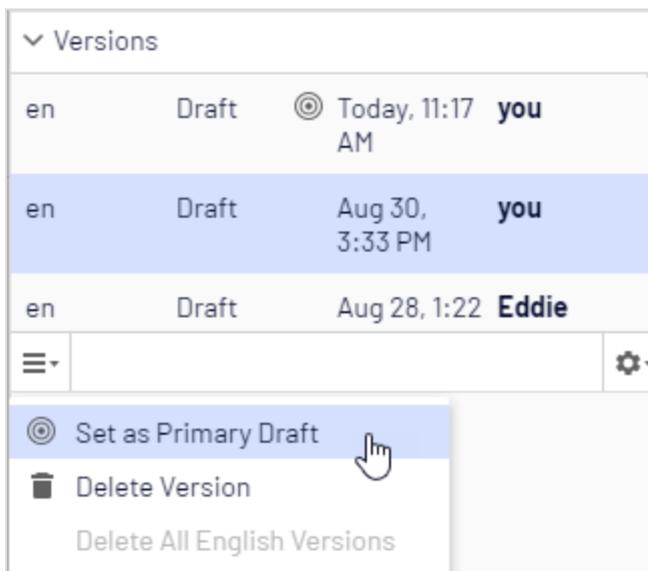
- **Ready to Publish.** Content awaiting approval and publishing.
- **Rejected.** The content was set as **Ready for Review** or **Ready to Publish** and an approver has rejected the content. You can edit and update the rejected content and then set it to **Ready for Review** or **Ready to Publish** again.
- **Scheduled for Publish.** Content scheduled to be published at a specified time.
- **Expired.** Content where a stop publish date and time is set and passed. The stop publish date applies to all versions of a page, which means that you cannot have one version of a page that is expired and one that is published.

Setting the primary draft

Note: Versioning works differently if you are working with projects. For a more detailed description on how Optimizely handles versioning in projects, see [Versioning when working in projects](#).

The **primary draft** is the draft presented in edit view, when accessing the content. Multiple drafts may exist, by default the latest saved edited version is the primary draft.

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



A content item that is not published can have only one draft. You can create multiple drafts from published versions, each draft is editable individually and you can schedule for publishing at different times. There are no versioning of drafts so there is only one version of each draft.

Editing and deleting versions

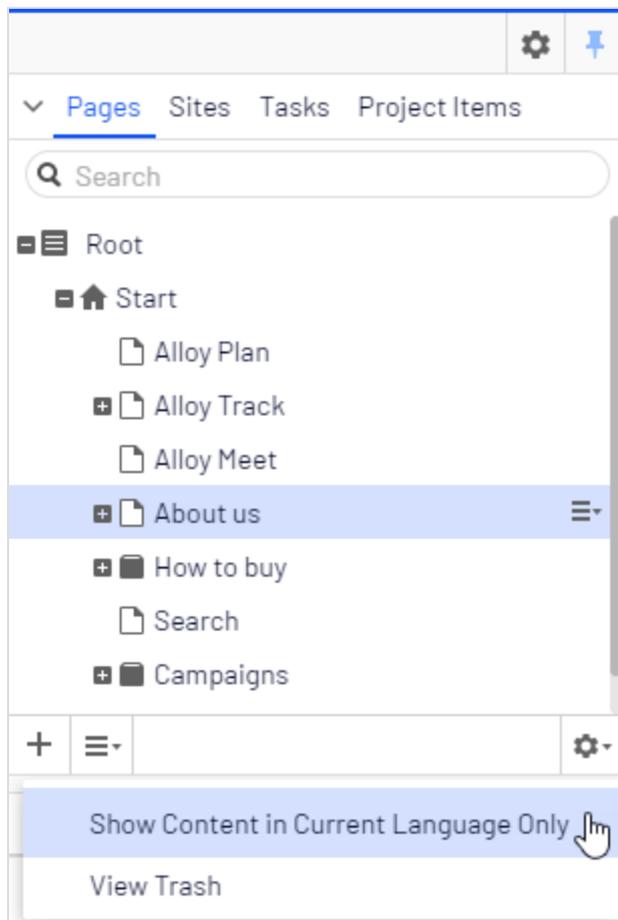
The content version selected in the version list is loaded into the editing area, from where you can edit the content or perform other available publishing actions.

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

Note: The version with status **Published** cannot be deleted, to do this another version needs to be published first. Deleting content versions cannot be undone. You can disable the ability to delete versions in the administration view.

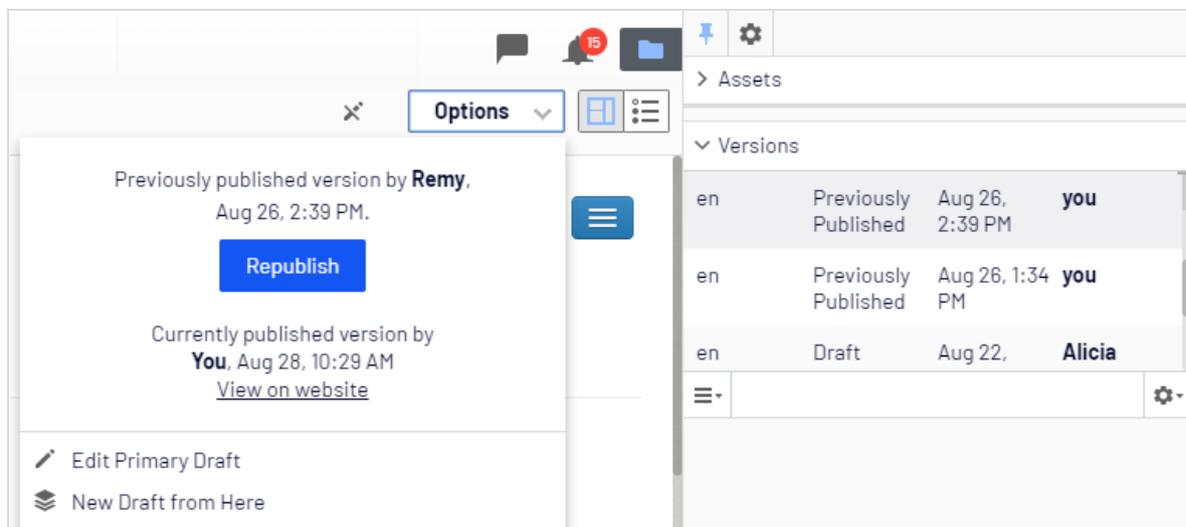
Managing language versions

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



Republishing a version

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



Note: You can only republish a previously published version if no [approval sequence](#) has been defined on the content item. If an approval sequence has been defined, you must select **New Draft from Here**, set the new draft to **Ready for Review** and then let the draft be approved before it can be published.

Unpublishing content

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

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

- Set the content item to **expired** if you want to keep it for reference or future use.
- Remove the *Everyone* [access rights](#) to it.
- [Delete the content item](#) if you do not want to keep it.

Setting expiration of content

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

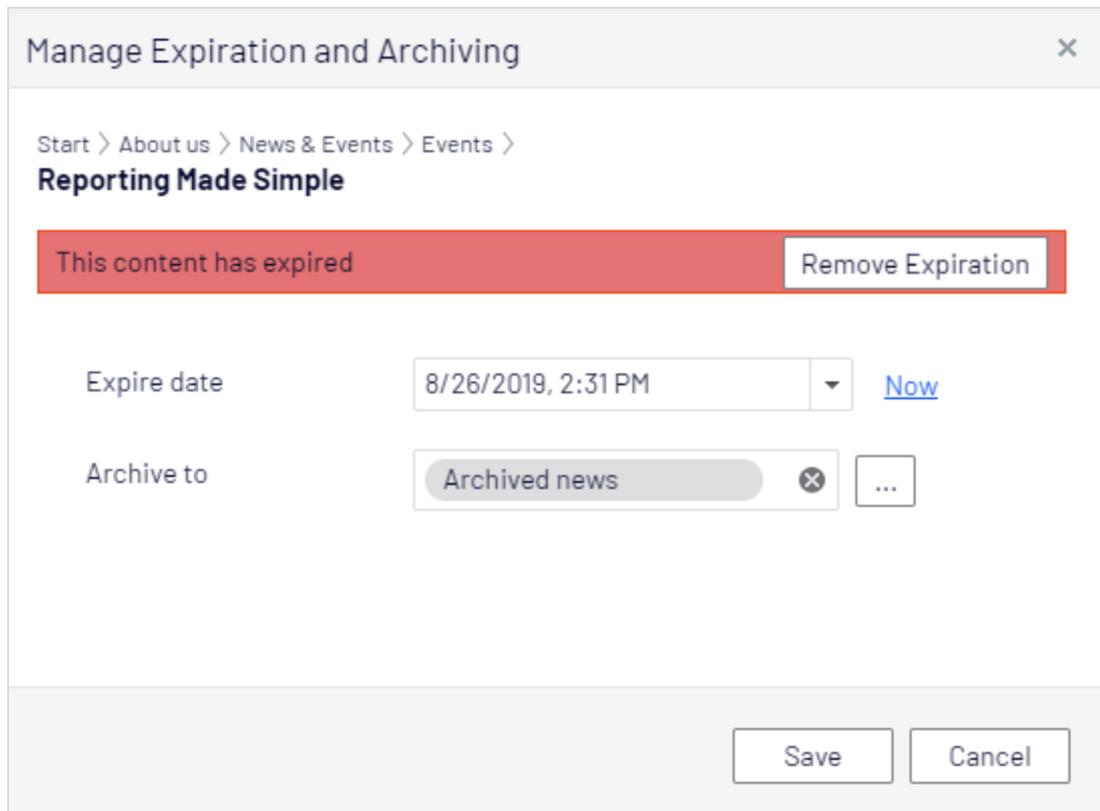
Note: The expiration sets a stop publish date on the content and this date applies to all versions of the content. For example, if you set a page to **expired** and then create a draft from the latest published version and publishes that draft, it will still be expired and not displayed on the website. You must manually remove the expiration for the page to be public.

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

Archiving of expired content

Optimizely has a built-in archiving feature where pages with a set *stop publish time* are automatically moved to a defined archive branch when the time has passed. This is useful when you have news pages in a listing where you want to remove old news from the listing, but still keep the pages in an archive. Note that the expiration date is removed when the items are moved to the archive to make the archive public.

Archiving expired content is done in the **Manage Expiration and Archiving** dialog box by selecting the page branch to which you want to move the expired page.

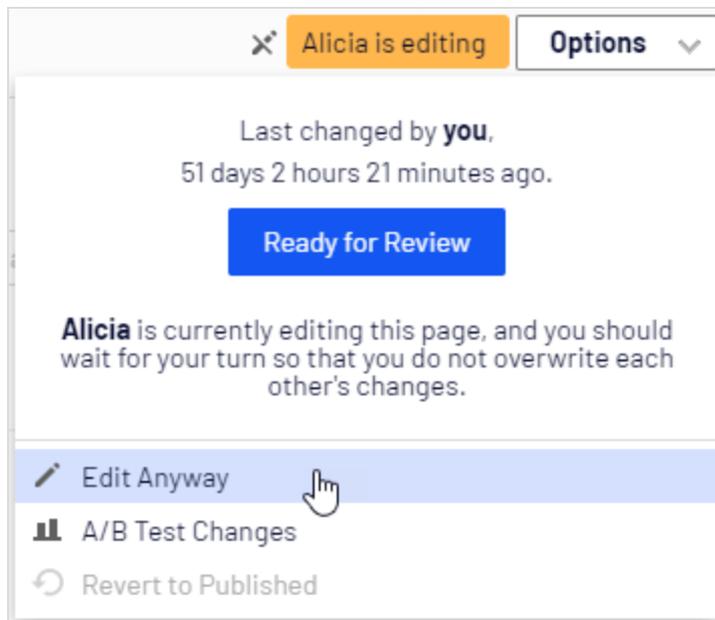


Working with shared content

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

Mark as being edited

Even if content is marked as being edited, another editor can select the **Edit Anyway** option, and continue working with the draft.



Permanently mark as being edited

The **currently being edited** markup setting is automatically cleared after some time. To keep this setting, you can set a **permanently being edited** markup through the [All properties editing view](#) by selecting **Tools > Permanently Mark as Being Edited**. This setting remains until manually disabled (toggle the setting to disable).

A/B testing

A/B testing lets you create variations for a number of page elements (blocks, images, content, buttons, form fields, and so on), then compare which variation performs best. It measures the number of **conversions**¹ obtained from the original (control) versus the variation (challenger), and the one that generates the most conversions during the testing period is typically promoted to the design for that page. Optimizely A/B testing has several predefined conversion goals you can use when setting up a test, and it is also possible for Optimizely developers to create customized conversion goals.

¹When a website visitor takes a desired action. This desired action can be, for example, buying an item, filling in a form, or clicking a link.

See also Optimizely Web, a powerful front-end A/B and multi-page experimentation product.

Note: The [Optimizely Digital Experience Platform](#) contains many features to support you in your daily work. Depending on how your solution is set up, some features described in this documentation may not be available to you. Contact your system administrator to find out more. See [Optimizely World](#) for technical information.

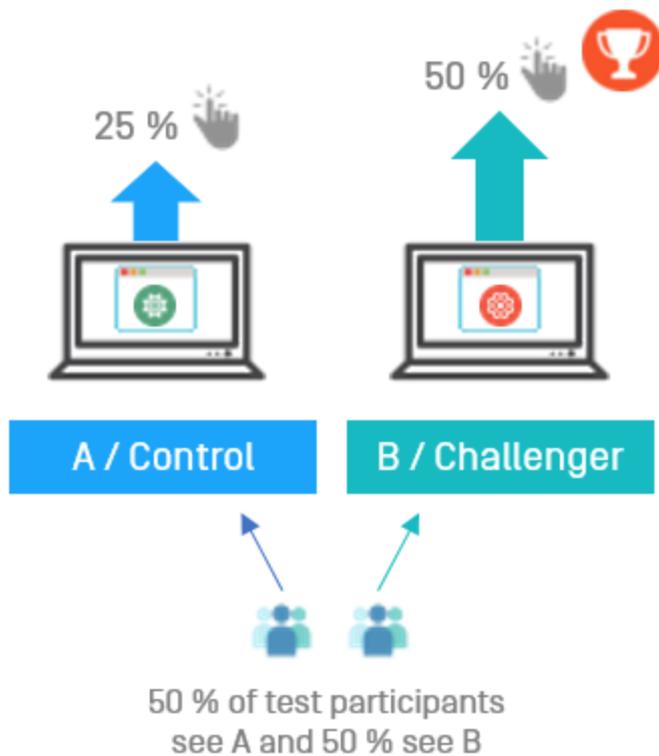
 Video tutorial: [A/B testing](#) (5:07 minutes)

How it works

Let's say you want to know whether a different advertisement can generate more interest from your site visitors. Using A/B testing, you create two page versions with two different advertisements that link to a **target page**¹. You set the A/B test to use the conversion goal *Landing Page*, which measures how many visitors click the advertisements and reach the target page.

1. When a visitor views your A/B test page, the visitor sees the original (A / Control) or the variation (B / Challenger) version. A/B testing logs which version the visitor sees. If a visitor returns to the test page, the visitor sees the same version (A or B) throughout the duration of the test. However, if they clear cookies, and revisit the test page, they are considered a new visitor in the test.
2. If a visitor clicks the advertisement, the target page appears and A/B testing logs the action as a conversion.
3. When the test duration completes, the version that achieves the best results (that is, the most clicks) is declared the winner of the test.
4. Depending on your site configuration, you can manually pick a winner (usually the one with most conversions) or the winner is automatically published when the test completes. Test winners are only automatically published if test results are statistically significant. For more information on statistical significance on A/B tests, see the [Statistical significance](#) section below.

¹The page that defines the end goal of a conversion path.



Statistical significance

Statistical significance is a calculation that determines if test results can be considered "significant" or not. It is a function of the number of views and conversions of the variants. So, if one version is winning by a wide margin but has a relatively low number of views, it could still be calculated as the statistically significant winner of the test. Whereas a test with a great many more views, but where the variants' conversion rates run much closer, could have results that would not be considered significant. Theoretically, statistical significance can be achieved at any point during a test. This is not done here. A/B testing lets the test finish before running the calculation that determines if the results are "significant".

So, how many views are needed to ensure statistical significance? The answer is that it depends on the margin of conversions the winning variant is winning by.

Confidence level

The confidence level set in [Advanced options](#) is used in the significance calculation to specify the amount of variance the results can have before they are considered statistically significant. The higher the confidence level you select, the more “sure” the calculation has to be that a variant is winning by a statistically significant margin. This is saying how much standard deviation the calculation can have before the results are viewed as significant. Typically, the more data in a test means that the standard deviation goes down, and thus the confidence % in those results goes up.

Once the test has completed and results are calculated using the selected confidence level, the reporting appears at the top of the **Pick a Winner** screen.

Starting an A/B test

1. Start with a published version of a page or block as the original (A / Control). For example, you have a site devoted to air travel tips and want to get visitors interested in exploring your site. Will a fancy graphic button get more **click-through**¹ than a plain text button?
2. Create a draft by changing the button or making some other change to the page:

Image on version A / Control:

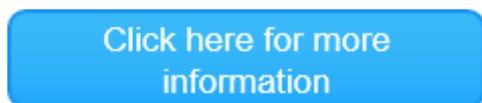


Image on version B / Challenger:



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

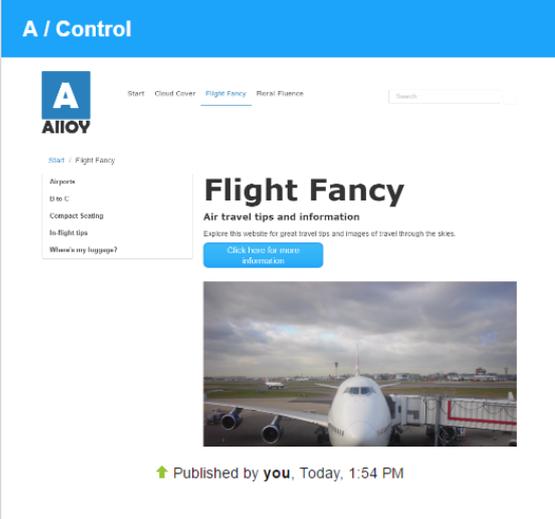
If you are using [Content approvals](#), set your draft to **Ready for Review** and let it be approved before you start the A/B test.

¹Following a hypertext link to a particular website; especially a commerce site.

Flight Fancy A/B Test

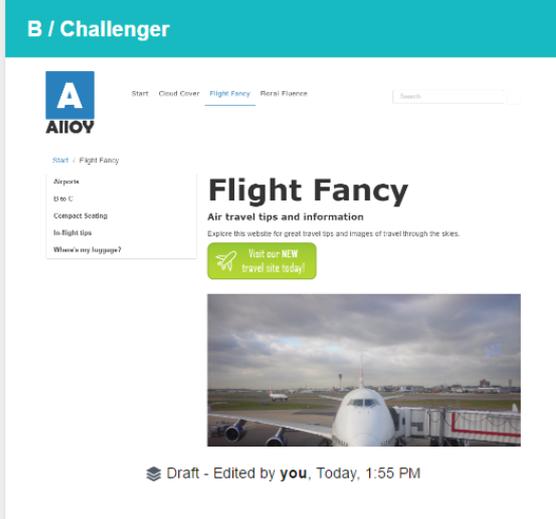
Determine whether new or changed content improves the conversion rate.

A / Control



Published by you, Today, 1:54 PM

B / Challenger



Draft - Edited by you, Today, 1:55 PM

Test goal

Which button will generate more downloads.

Conversion goal(s)

By default, all goals have equal weight. You can set an individual weight for each goal in [Advanced Options](#).

Add another goal

Landing Page X

The chosen page is the one that a user must click on in order to count as a conversion. Results: Views are the number of visitors that visit the page under test. Conversions are the number of visitors that clicked through to the landing page at any point in the future while the test was running.

Visitor navigates to page

Participation percentage

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

%

Test duration

day(s).

Start test

Start immediately
 Schedule for later

Advanced Options

Balance the importance of the test goals:

Here you can decide if one of the goals are more important to the way you will measure a winner. If you give a goal a higher importance, conversions towards that goal will count higher than conversions towards the ones with a lower setting. If you give all goals the same importance, conversions towards all goals will be measured the same way.

Time on Page	<input checked="" type="checkbox"/> Low
Site Stickiness	<input checked="" type="checkbox"/> High
Landing Page	<input checked="" type="checkbox"/> Medium

Confidence level

The confidence level dictates the amount of errors allowed. A higher percentage directly correlates to the accuracy of the test results. This denotes whether the difference measured between the control page and variant page is not by chance (i.e. significant).

4. Configure your A/B test by setting the following options:

Option	Description
Test Goal	Enter your hypothesis for the test. This is for your information only.
Conversion goals	<p>Select the conversion goal or goals that you want to measure. (Conversion goals are also known as key performance indicators KPIs¹.) You can add up to five conversion goals for the A/B test, and under Advanced Options, you can decide if some goals are more or less important than others.</p> <ul style="list-style-type: none"> • Landing Page. Select a target page to which visitor is taken when the visitor clicks through. Only a click-through is counted as a conversion. • Site Stickiness. Select a target page and a timeout period (1-60 minutes). The A/B test counts a conversion if a visitor goes from the target page to any other page on your website during the time period. If the visitor closes the browser then opens your target page again within the specified time period, a new page view is not counted. However, a conversion is counted if the visitor goes from the target page to another page during the second visit. • Time on Page. Enter a time in seconds. The A/B test counts a conversion when a visitor stays the defined time on the test page. • Add to Cart. Select a product a site visitor can add to a cart. If a visitor adds that product to a cart, it is counted as a conversion. • Average Order. Select this conversion goal to track completed orders on each of the test pages. The conversion goal totals up the values of all Optimizely Commerce carts created by visitors included in the A/B test. The test determines which page variant creates the highest average value for all those carts when picking a winner. If a visitor creates multiple carts, all the (purchased) carts are included in the total, which means that the visitor can “convert” many times in the test duration. On Optimizely Commerce websites using different currencies, the test converts all carts to the same currency. • Purchase Product. Select a product a site visitor can buy. If a vis-

¹Stands for "key performance indicator" (also known as a conversion goal); the measurement of actions on web pages. The actions can be completed purchases, pages visited, time spent on site and so on.

Option	Description
	<p>itor buys that product, it is counted as a conversion.</p> <p>Note: You need Optimizely Commerce to use Commerce-related conversion goals such as Add to Cart, Purchase Product, and Average Order.</p>
Participation percentage	<p>Enter the percentage of total amount of traffic to your A/B test.</p> <p>If you set it at 100%, all website visitors participate in the test. Half of the test participants will see version A, and half of them will see version B.</p> <p>However, you may not want so many visitors to see version B if it includes something that might be unsuccessful. You accomplish this by lowering the percentage of visitors included in the test. Visitors not included in the test will see version A. Only visitors included in the test count in the statistics.</p>
Test duration	<p>Specify the number of days you want the test to run.</p>
Start test	<p>Select one of the options. You can stop the test at any time before the number of specified days are done.</p> <ul style="list-style-type: none"> • Start test immediately. Select this option and click Start Test after you specified the test parameters. • Schedule for later. Select this option and a date picker appears. Select a date and time to start the test. Click the Schedule Test button after you specified the test parameters.
Advanced Options	<ul style="list-style-type: none"> • Balance the importance of test goals. Select if one goal is more important, or less important, than the others. If two conversion goals are set to High (or Low), it is the same as leaving them at Medium, meaning they have the same importance and thus not weight the test result. Similarly, if you add a single conversion goal, the selected weight has no effect on the test result. • Confidence level. Select the confidence level of statistical sig-

Option	Description
	<p>nificance you want from the results that you gather. The higher the confidence level you select, the more “sure” the calculation has to be to determine that the winning variant is winning by a statistically significant margin.</p>

5. Click **Start Test** if you set the test to start immediately, or **Schedule Test** if you scheduled the test for later.

Viewing a running A/B test

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

A version of this content is part of an on-going A/B test. [View test](#)

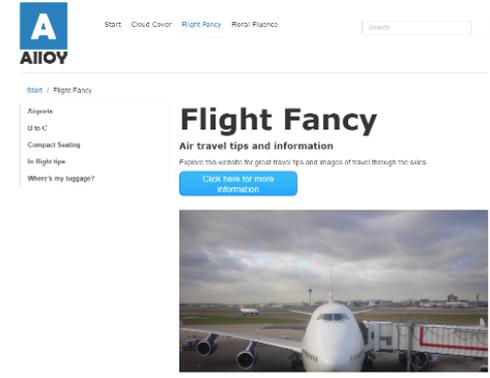
The test results are displayed, and a flame graphic shows which version is leading:



 **Flight Fancy A/B Test**

Test is running, 8 day(s) remaining. Started Today, 2:22 PM by you

A / Control



42%

Conversion Rate

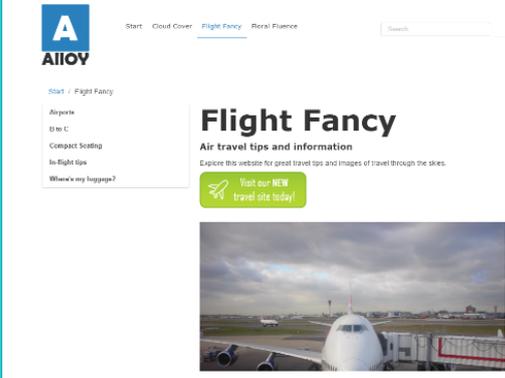
8

Views

[Hide Details](#)

Conversions	Weight	Performance
Visitor navigates to any other page within 5 minute(s).	4	~60%
Number of seconds visitor remains on the page: 120	0	~0%
Visitor navigates to page Booking	4	~40%

B / Challenger



43%

Conversion Rate

5

Views

[Hide Details](#)

Conversions	Weight	Performance
Visitor navigates to any other page within 5 minute(s).	3	~69%
Number of seconds visitor remains on the page: 120	0	~0%
Visitor navigates to page Booking	2	~31%

Beneath the two page thumbnails, you can view the currently collected test data, such as views, number of conversions, and conversion rates. If you are measuring towards multiple conversion goals, you see how each goal is performing and what weight each goal is given. If you are measuring towards one goal only, you see the test data and a pie chart visualizing the conversion rate. The conversion rate can be a percentage rate or an amount, if you are using the [Average Order KPI](#). (The pie chart is not displayed for Average Order KPI.)

Note: A/B testing normally calculates the views as the number of times a page has been displayed to a visitor. However, when you are testing a block, A/B testing counts the number of times the

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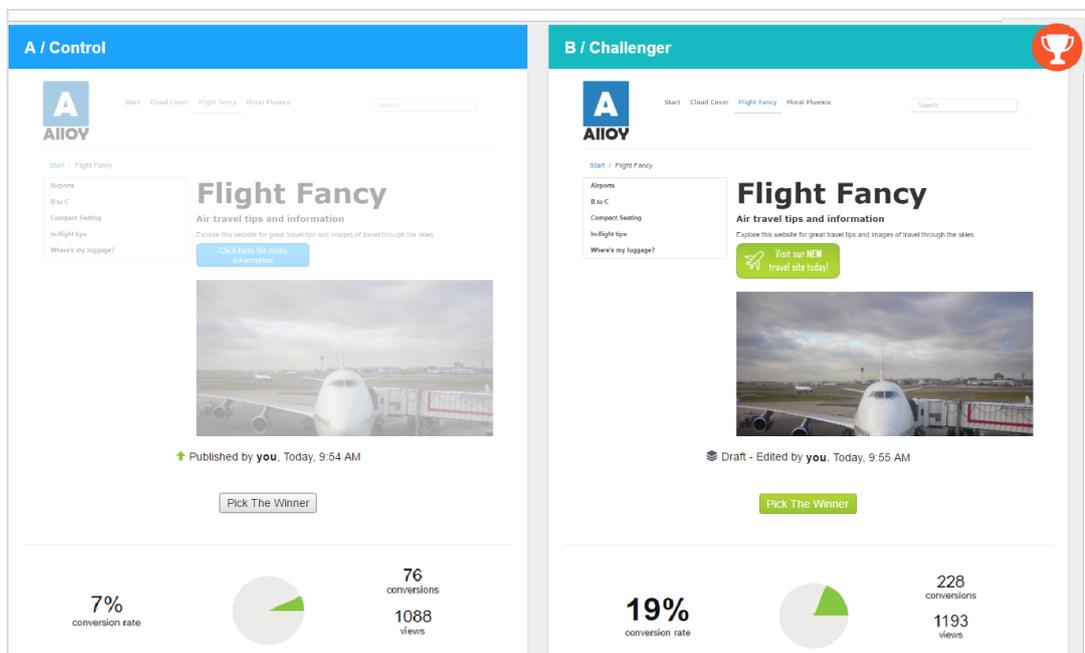
block has been requested by Optimizely CMS. If you have a condition set on your block so it is only displayed to certain visitor groups, for example, a view may be counted even though the block has not been displayed to a visitor.

Note: [Statistical significance](#) of the test is calculated when the test is finished. Before that, it is not possible to say whether the test results are significant or not.

2. You can select the following actions from the **Options** menu:

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

If you select **Pick The Winner**, the Pick the Winner view appears. The leader is highlighted in green. Click **Pick The Winner** and it is automatically published. After you select a winner, the loser is added to the **Versions** gadget as a historical artifact.



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

Picking a winner

Depending on your site configuration, a test winner can be published automatically at the end of the test, or you can publish it manually, during or after the A/B test.

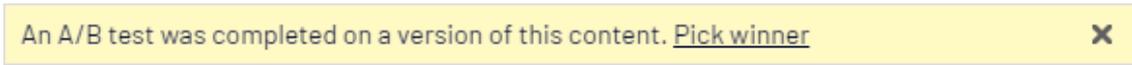
Publishing a test winner automatically

An administrator can set up your site to automatically publish A/B test winners at the end of a test, if the test result is statistically significant. If this setting is enabled, it affects all tests on your site. As soon as a test finishes, the test winner is published. However, if the test result is not statistically significant, you have to manually publish one of the test versions.

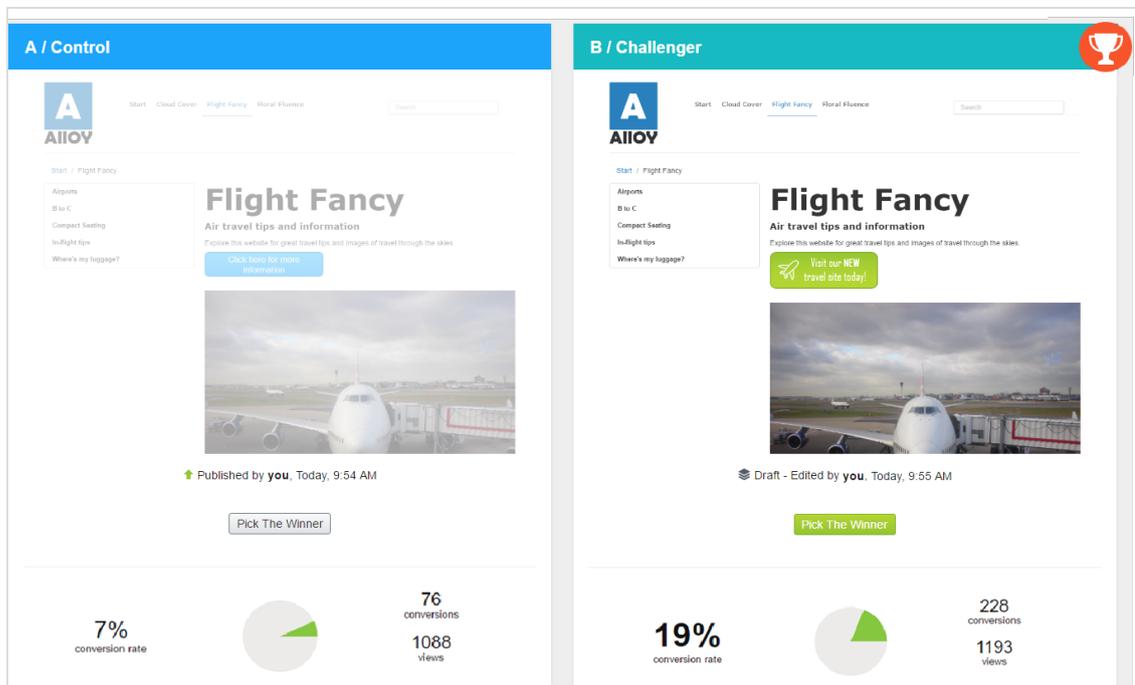
Publishing a test winner manually

If you have publishing rights, you can publish a test winner while the test is running or wait until it finishes.

1. To view a finished A/B test, open the page you are testing, and click **Pick winner** on the notification bar.



The test results are displayed.



At the top of the test result screen, you can see if the results are **statistically significant**.



The test winner is highlighted with a green background and a trophy graphic: . The **Pick The Winner** button of the test winner is green, but you can publish either version.

Beneath the two page thumbnails, you can view test data, such as views, number of conversions, and conversion rates. If you are measuring towards multiple conversion goals, you see how each goal has performed.

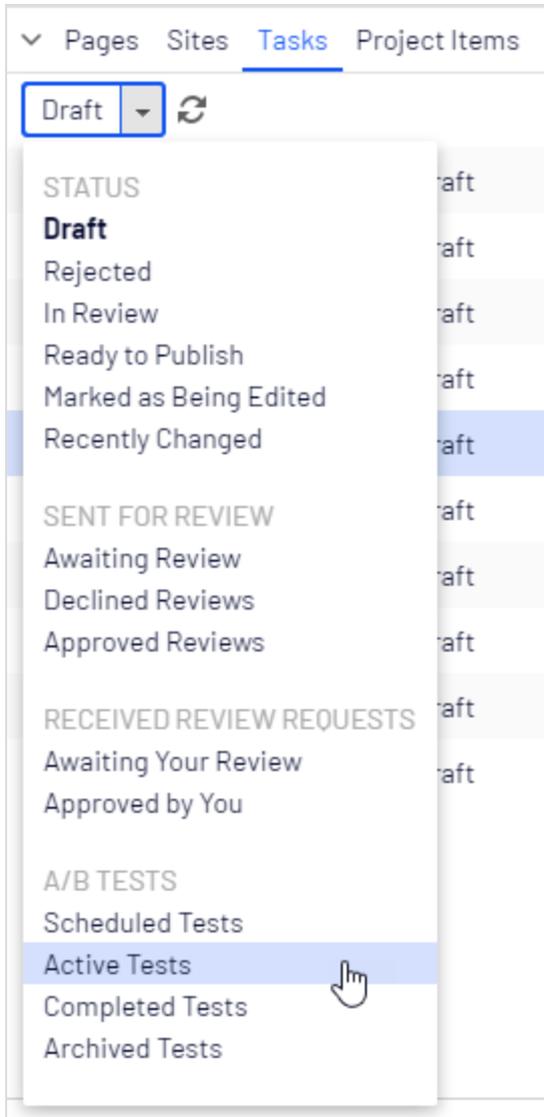
2. Click **Pick The Winner** on the version you want to publish and it is published immediately.

The loser is still available in the Versions gadget.

Managing A/B tests

You cannot edit the test settings or the content of a page while the test is running because you could possibly invalidate the results. If you need to change the test settings or something on the test page, you must cancel the test, make your changes, and start the test over. You can cancel the test from the **Options** menu in the test view or from the test page. If you open a draft of the test page, the **Options** menu is called **Publish?**

Use the **Tasks** tab in the navigation pane to find A/B tests.



Scheduled Tests. Displays links to tests that are scheduled to run at a later time.

Active Tests. Displays links to active test pages that are collecting data. Click an item to display the test page, where you can click the **View test** link to display the snapshot of result data.

Completed Tests. Displays links to completed tests. Data is no longer being collected. A winner has not yet been published.

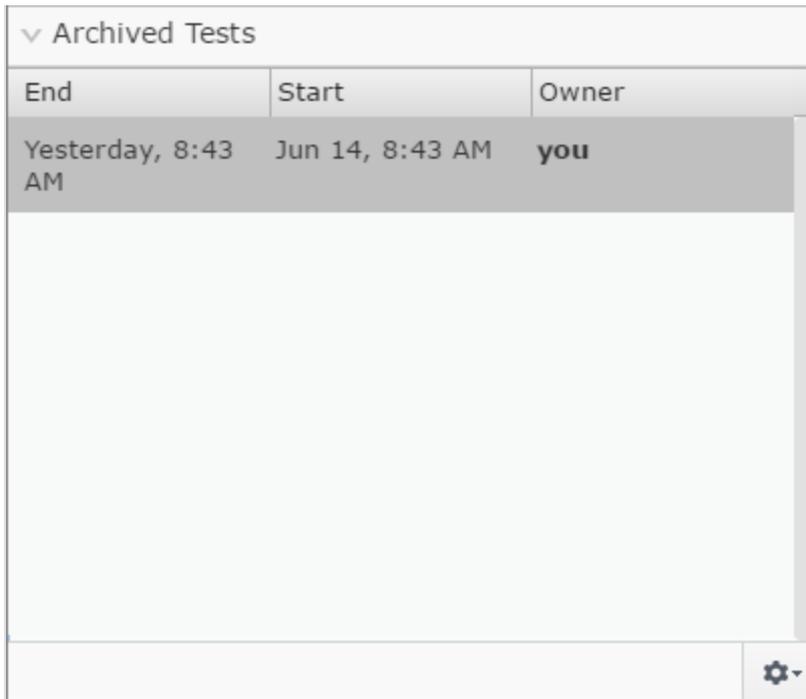
Archived Tests. Displays links to completed tests where a winner has been published.

For other statuses in the Tasks bar, see [Controlling the publishing process](#).

Viewing completed and archived tests

In the Tasks pane, you can see all A/B tested pages by selecting **Active Tests**, **Completed Tests**, or **Archived Tests**. (A completed test is a test that is finished but a test winner was not yet published. An archived test is a completed test where a test winner was published.)

To view the individual tests run on a specific page, add the Archived Tests gadget to the navigation or assets pane and open a tested page. The gadget displays all archived tests run on the current page. Click a test in the gadget to view the test details.



End	Start	Owner
Yesterday, 8:43 AM	Jun 14, 8:43 AM	you

Controlling the publishing process

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

Ways of controlling the publishing process:

- [Content approvals](#)
- [Change approvals](#)
- [Use Projects to multi-publish items](#)
- Restrict access rights (see the Optimizely CMS Admin guide)
- [Use the Tasks tab](#)

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

- **Content must be approved before it can be published**

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

- **Changes must be approved before they are applied**

[Change approvals](#) is a way to make sure that certain changes are reviewed and approved before they are applied. The changes that are applicable for review are changes that affect how your website looks to visitors, such as moving a page to another parent item in the structure (as that can affect menus) or changes to access rights, language settings, or expiration dates.

- **Publish multiple related content items at the same time**

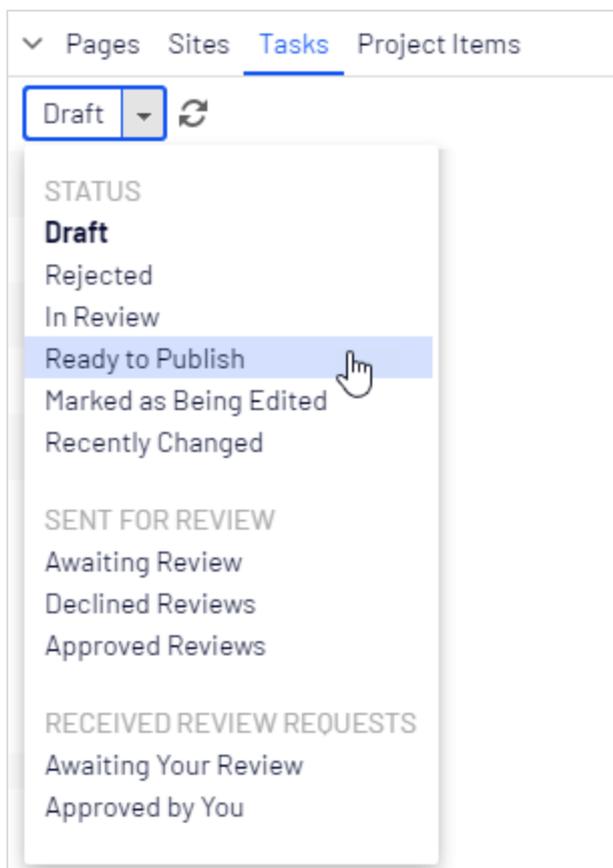
The [projects feature](#) and the [projects gadget](#) let you preview and publish multiple content items at the same time, such as a landing page, blocks and products (if you have Optimizely Commerce installed) that are part of a campaign.

- **Restrict publishing access rights**

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

- **Use the Tasks tab**

The simplest way to monitor content creation activities is to use tasks. The **Tasks** option lists changes to content filtered by [content status](#).



You can use the following options for monitoring content creation and [content approvals](#):

Option	Description
Draft	Lists all draft versions that have been created or changed by you.
Rejected	Lists all content items in status Rejected that have been created or changed by you. Items are set as Rejected when they have been set to Ready for Review or Ready to Publish and then are declined. You can edit and update content in status Rejected before you set it to Ready to Publish or Ready for Review again.
In Review	Lists all content items on the website that are set as Ready for Review . See Content approvals .
Ready to Publish	Lists all content items on the website that are set as Ready to Publish and that you have publish rights to.
Marked as Being Edited	Lists all content items on the website that you have set as being edited. See Tools under Basic information properties .
Recently Changed	Lists the last items that are changed for the website by you or any other editor.
Awaiting Review	Lists the content items that you have sent for review and are in content status In Review .
Declined Reviews	Lists the content items that you have sent for review and are declined items in content status Rejected . As soon as the item is updated, it is not displayed in this list anymore.
Approved Reviews	Lists the content items that you have sent for review and are approved, that is in content status Ready to Publish . As soon as the item is published (or updated), it is not displayed in this list anymore.
Awaiting Your Review	Lists the content items that you are one of the designated approvers of.

Option	Description
Approved by You	Lists the content items you have approved. As soon as the item is published (or updated), it is not displayed in this list anymore.

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

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

Content approvals

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

Video tutorials

There are three video tutorials on the Content approvals feature. The first one is a basic demo of the feature and describes how to set up an approval sequence and a basic review scenario. The second video describes how you can set up different reviewers for different languages when you have a multi-language site. It also shows you how content approvals can be combined with comments and projects. The third video describes how content approvals work for blocks and media. It also highlights the use of multi-language sites, projects and notifications features.



[Content approvals video - basic functionality \(7.04 minutes\)](#)



[Content approvals video - multi-language site \(6.21 minutes\)](#)



[Content approvals video - approvals for blocks and media \(6.17 minutes\)](#)

How it works

Sequences and reviewers

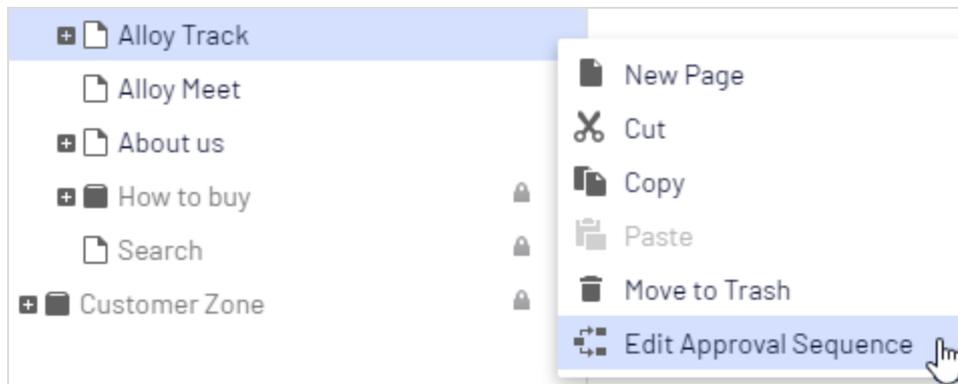
An approval sequence can be set up with any number of approval steps and any number of reviewers in each step. The sequence is set up by an administrator; as described in *Managing approval sequences in the CMS Administrator Guide*.

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

Note: The administrator can prevent editors from approving their own changes, which means that appointed reviewers are not allowed to approve any review requests they have started themselves. However, they can still cancel their own review requests.

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

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



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

Content approvals on assets

Each page in Optimizely can have its own content 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 content approval sequence is set on each assets folder, and all assets in a folder have the same approval sequence set. *Global* and *site-specific assets folders* can inherit their approval sequence from a parent folder, or an administrator can define a unique sequence for it (or disable it completely so that assets in the folder do not have to be approved). *Local assets folders* inherit their approval sequence from the page they are associated with. See [Folders](#) for a description of global, site-specific and local folders.

What happens if I want to move folders or assets that have content approval sequences set?

Moving folders and assets that have content approval sequences set, works like the following descriptions.

Folders

- Moving a **folder** to another **global or site-specific folder**. The folder keeps its original approval sequence. You can move the folder even if items in the folder are in review.

- Moving a **folder** to a **local assets folder**. The folder's approval sequence is changed to the local assets folder's sequence. You cannot move the folder if items in the folder are in review.

Assets

- Moving an **asset** to a **global or site-specific folder**. The approval sequence on the asset is changed to the new folder's approval sequence. You can move an item even if it is in review. However, 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.

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

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

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

If you are working on a multi-language site, items such as images that do not have a language set can be approved by any reviewer (even by reviewers that only have access to a specific language). Example: You have a site in English and German (where English is the **master language**¹) and you have set up the approval sequence so that reviewer Julia is responsible for the German content items but not the English items. You keep a folder with

¹The language in which the first version of content is created.

the two images *Party_teaser_EN.png* and *Party_teaser_DE.png* for an English and a German version, and Julia is a designated reviewer in the approval sequence on this image folder. Julia can then approve all images in the folder even if the *Party_teaser_EN.png* is only used on English pages, which she does not have access to.

Assets added to an assets folder with a content approval sequence set are not auto published.

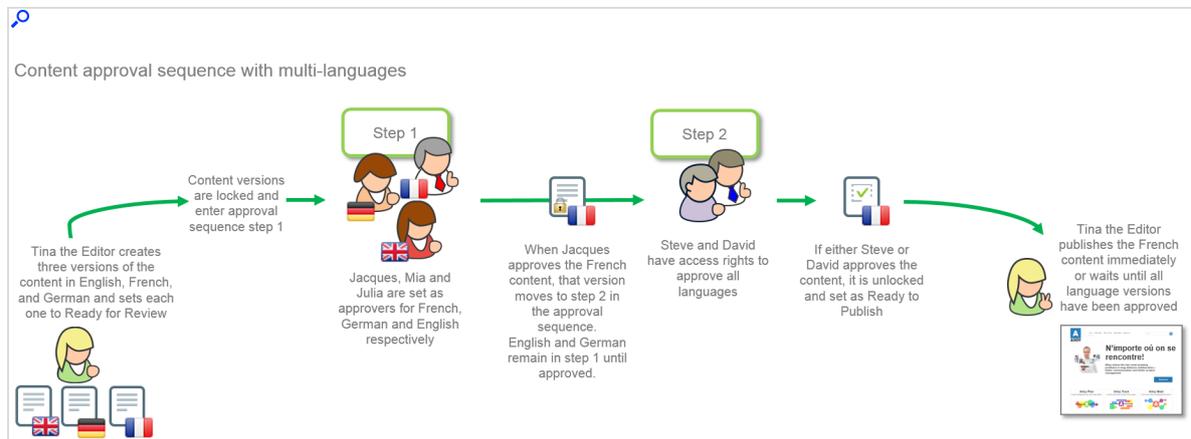
Multiple languages

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

Each language version can be set as **Ready for Review** and approved separately from the other language version. This means that the German version of an item can be approved in three approval steps and published before the French version has even passed approval step 1. See [Translating content](#) to work with different languages.

Example: Content approval sequence with multi-languages

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

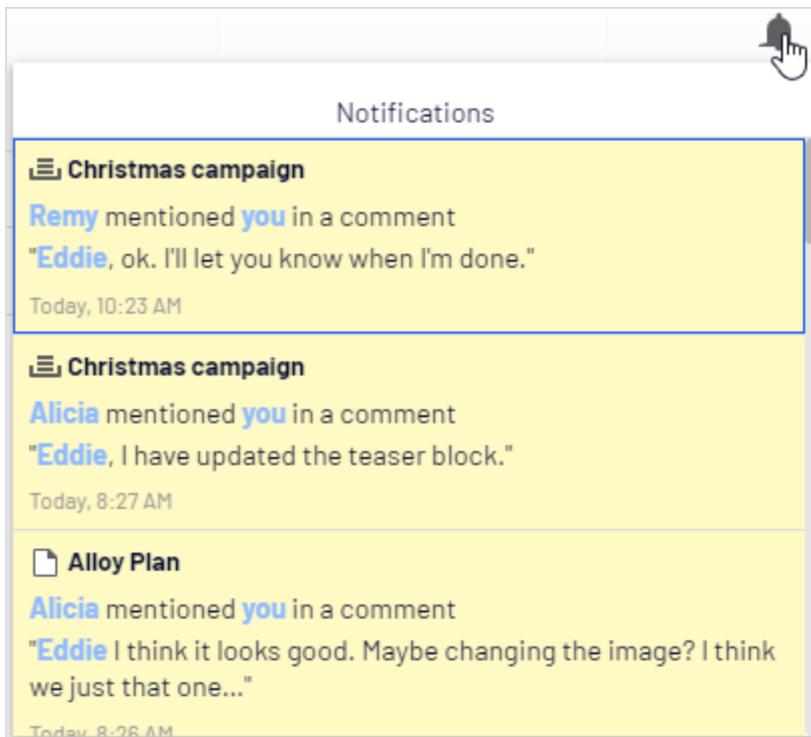


Approval rejections

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

Notifications

If you have started a content approval sequence by setting an item to **Ready for Review**, or is set as a reviewer, you receive notifications in the user interface. The bell icon in the toolbar displays the number of new notifications you have; click the icon to display a list of notifications. From the notification list, you can go to the item that needs to be reviewed.



If your system is configured to use email notifications, you will also receive an email; how often these notifications are sent depends on the system configuration.

Notifications are sent when:	To:	Notification message:
an item is set to Ready for Review.	the reviewers in the first step.	"Awaiting your approval or one of Z others. Step X of Y" (if there are multiple reviewers in the step) or "Awaiting your approval. Step X of Y" (if there are only one reviewer in the step).
an item was <i>approved</i> in a step.	the reviewers in the next step.	"Awaiting your approval or one of Z others. Step X of Y" (if there are multiple reviewers in the step) or "Awaiting your approval. Step X of Y" (if there are only one reviewer

Notifications are sent when:	To:	Notification message:
		in the step).
all steps were <i>approved</i> and the item is set as Ready to Publish .	to the user who started the content approval sequence.	"The reviewed content has been approved and is now ready to publish."
a content approval step was <i>declined</i> .	to the user who started the content approval sequence, and to all reviewers in current and previous steps.	"Declined by *username*".
a content approval sequence was <i>cancelled</i> .	to all reviewers in current and previous steps.	"Review request canceled by *username*".

Review request from Geoff Johnson - Black Friday shoe sale

 Epic shoes <noreply@epicshoes.com> 👍 🔄 Svvara alla | v

1 går, 15:48
Amelia Goodhart

Review requested by Geoff Johnson
Black Friday shoe sale en Page
10/21/2017 3:48 PM

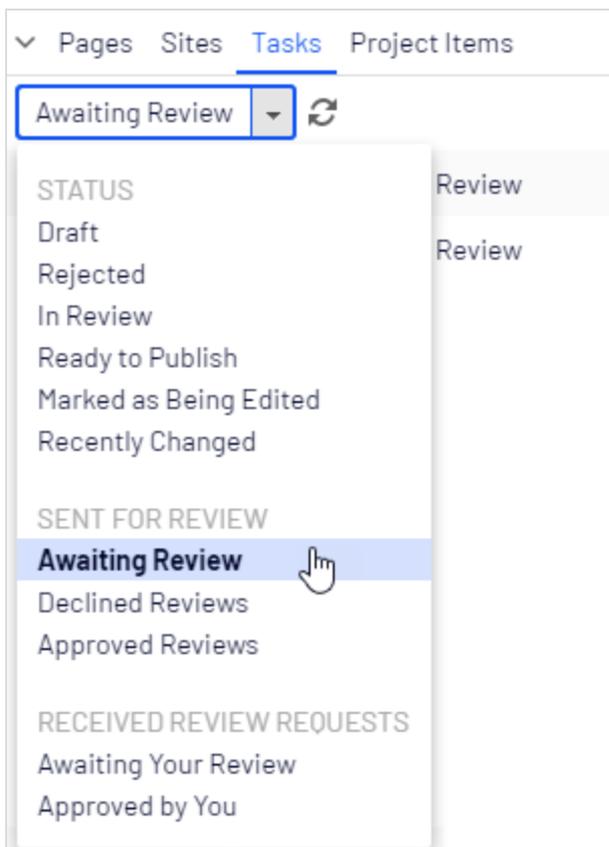
[Review item](#)

This email was sent by Episerver Digital Experience Cloud™. Please note that you cannot reply to this message.

The title of the email shows that it is a review request, and you can see who requested the review. You can also see the title of the item to be reviewed (*Black Friday shoe sale*), the language of the item (*en*, which stands for English), the item type (*Page*) and when the review was started (*10/21/2017 3:48 PM*). Click **Review item** to open the item.

Tasks

Tip: To keep track of the content items you have sent for review, items that are waiting for your approval or items you have already approved, use [Tasks](#) in the navigation pane.



Options related to content approvals in Tasks

Option	Description
In Review	Lists all content items that are set as Ready for Review .
Awaiting Review	Lists the content items that you have sent for review and are in content

Option	Description
	status In Review .
Declined Reviews	Lists the content items that you have sent for review and are declined, that is in content status Rejected . As soon as the item is updated, it is not displayed in this list anymore.
Approved Reviews	Lists the content items that you have sent for review and are approved, that is in content status Ready to Publish . As soon as the item is published (or updated), it is not displayed in this list anymore.
Awaiting Your Review	Lists the content items that you are one of the designated reviewers of.
Approved by You	Lists the content items you have approved. As soon as the item is published (or updated), it is not displayed in this list anymore.

What happens if a reviewer is away and cannot approve?

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

An administrator can approve and publish a page at any time.

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

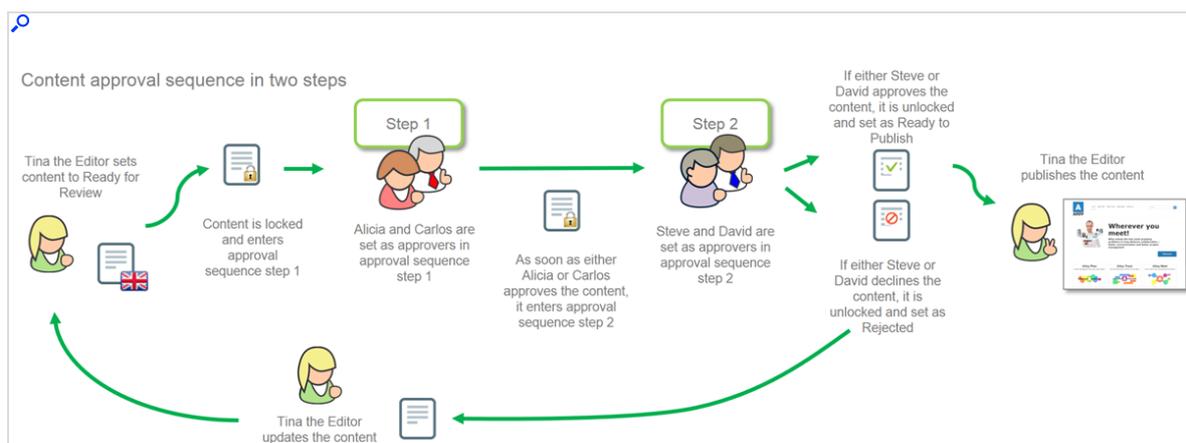
Example: Content approval sequence in two steps

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

When Alicia or Carlos has reviewed the page, she or he approves it.

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

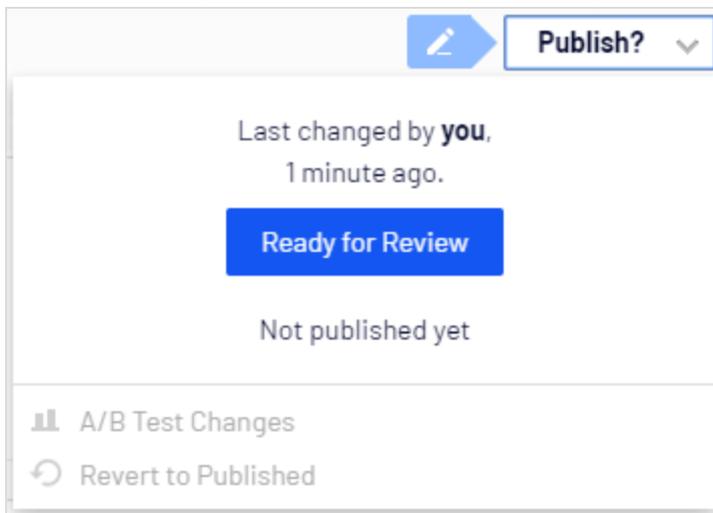
If Steve or David declines the approval, the content is set as **Rejected** and Tina must update it and set it to **Ready for Review** again. Alicia or Carlos will then have to approve the second draft as well.



Working with approval sequences

Starting an approval sequence

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



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

Image: Review icon in page tree



Image: Versions gadget shows **In review** status

Versions			
Language	Status	Saved	By
en	In Review	Today, 1:35 PM	you
en	Published	© Aug 23, 12:12 PM	Eddie

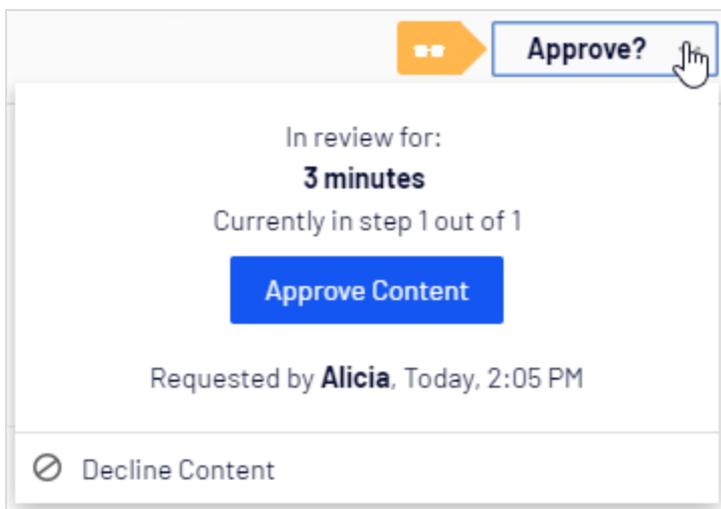
Approving or declining an approval step

If you are set as reviewer for a content item, you are notified in the user interface and by email (if the system is configured to send out emails) when it is ready for your review. Click the user notification or the link in the email to open the content item. If there is a previous version of the content item you want to review, you can use [the compare feature](#) to see where changes have been made.

When you have reviewed the content item, click **Approve?** and then either **Approve Changes** or **Decline Changes**. You may have to give a reason for approving or declining the content item.

If you approved the content item, it moves to the next step in the approval sequence, or if you were the last reviewer in the sequence, it is set as **Ready to Publish**.

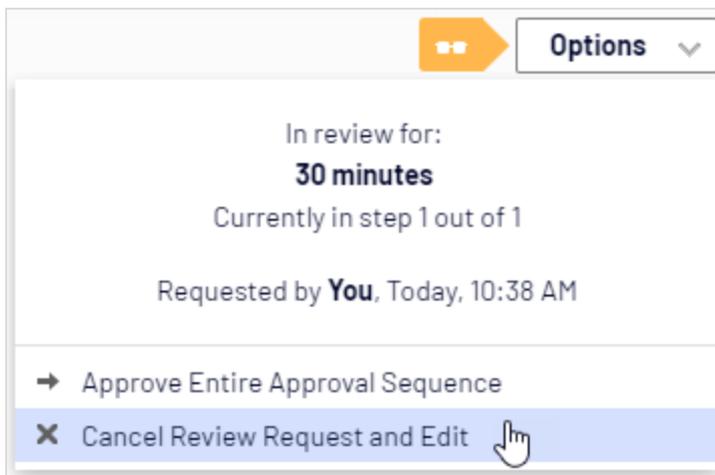
If you declined the content item, it is set as **Rejected** and the editor needs to update the content and set it to **Ready for Review** again.



Tip: If you have multiple review requests to go through, you can use [the Tasks pane](#) to see which items you should review and to go between them, and [the compare feature](#) to see where changes have been made.

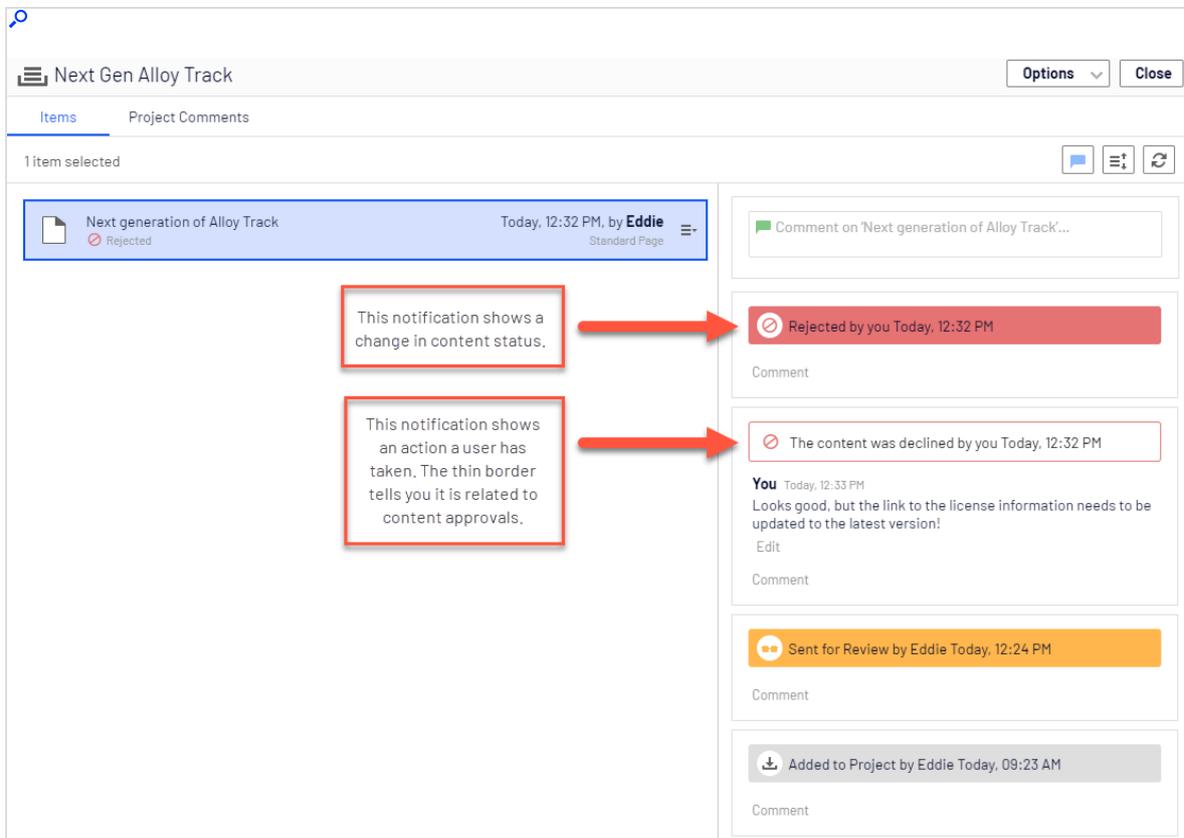
Canceling an approval sequence

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



Commenting when approving and declining content

When approving or declining content and depending on your system configuration, you may have to give a reason for your action. This comment is visible in the user interface and email notifications to the person who started the content approval sequence. It is also displayed in [the project overview](#), if the content item in review is associated with a project.



Change approvals

Change approvals is an add-on to Optimizely CMS, which lets you make sure that certain actions that affect the website structure or content are reviewed and approved before they are applied. The actions that can go through change approvals are changes to **access rights**, **language settings** for fallback and replacement languages, and **expiration date**, and also the **moving of pages and assets such as blocks, images, and media** in the structure.

Note: Change approvals are not triggered when a page is moved but remains under the same parent page, that is, when the page is moved only to change the sort order.

Change approvals is similar to [Content approvals](#), which is a feature where the content must be reviewed and approved before it can be published. You cannot use Change approvals without Content approvals. Both features use the same approval sequences, which means that the same reviewers approve changes to both content and to settings such as access rights, language settings, and so on.

Note: The [Optimizely Digital Experience Platform](#) contains many features to support you in your daily work. Depending on how your solution is set up, some features described in this documentation may not be available to you. Contact your system administrator to find out more. See [Optimizely World](#) for technical information.



Video tutorial: [The Change approvals feature](#). (4:42 minutes)

How it works

Change approvals are done by setting up a content approval sequence which defines the reviewers. An approval sequence can be set up with any number of approval steps and any number of reviewers in each step. The sequence is set up by an administrator; as described in [Managing approval sequences in the CMS Administrator Guide](#).

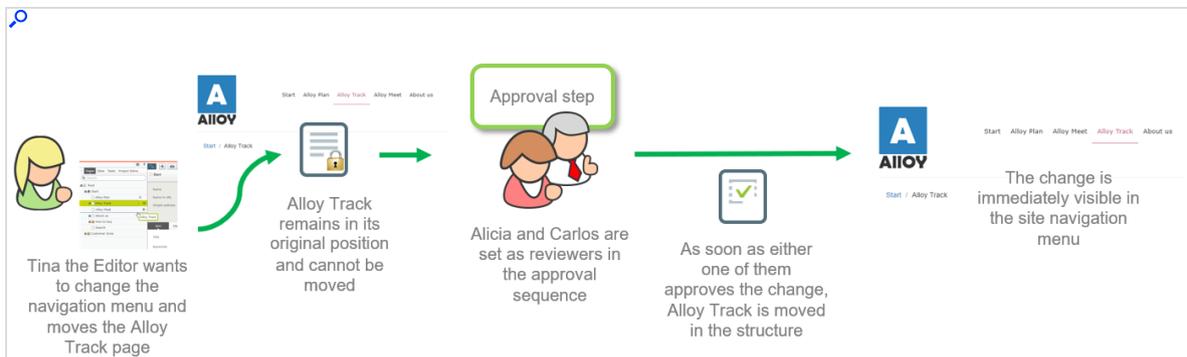
When an approval sequence has been defined, the approval process is started as soon as a user performs one of the actions that triggers the Change approvals. Once the process is started, the change must be approved or declined (or the review request canceled) before any other change that requires approval can be done.

As soon as one of the reviewers in a step approves the change, that step is considered completed and the reviewers in the next step of the sequence are notified that they have a change to review. When all steps in the approval sequence have been approved, the change is immediately applied.

Example: One-step change approval

Tina has been asked to change the order of the products in the Alloy top navigation menu. Since the navigation menu order is controlled by the order of the pages in the page tree, she moves the Alloy Track page in the page tree. The Alloy Track page has an approval sequence defined so the page is not immediately moved, and Tina sees a message that the

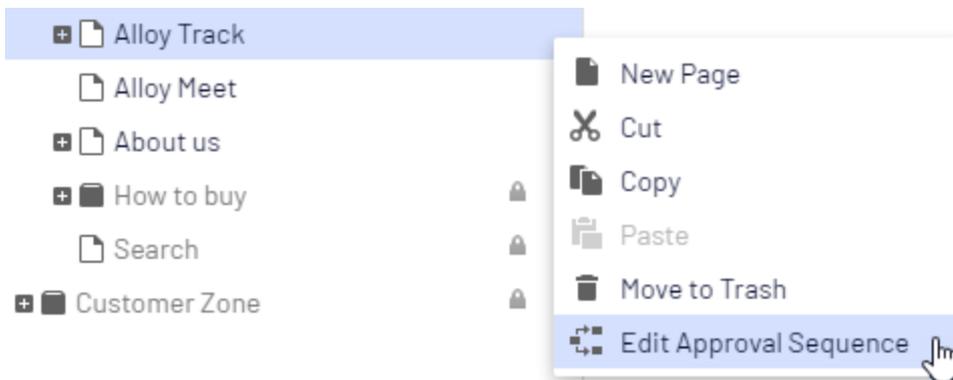
move of the page is awaiting approval. The approval sequence is set up with one step, and both reviewers, Alicia and Carlos, are notified in the user interface when they log in that Tina has moved Alloy Track and that they need to approve that move. Carlos now approves the move and the page is moved immediately and the top navigation menu is updated on the website. If Carlos had instead declined, the page would have remained in its original position.



Setting up an approval sequence

Change approvals use the same approval sequences as Content approvals. This means that if you have set a content approval sequence for a content item, the same sequence and the same reviewers, are used when action controlled by the Change approvals feature is performed on that content item. How to set up content approval sequences are described in detail in [Managing approval sequences in the CMS Administrator Guide](#).

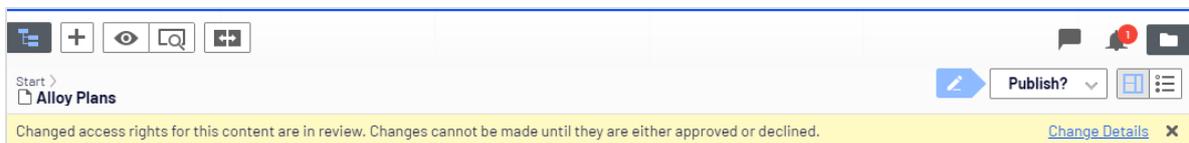
The approval sequence overview is opened from a page's or assets folder's context menu:



Note: When setting up an approval sequence, there is a language setting . This setting only applies to Content approvals, where it is possible to set up different reviewers for different languages. Change approvals does not take this setting into consideration; all appointed reviewers can approve changes in all languages.

As an editor or administrator, how does Change approvals affect me?

If you have the access rights to change one of the settings controlled by the Change approval functionality, you can change settings or move pages and blocks the same way as without Change approvals. However, after changing the setting, you will see a notification message: *Your changes have been saved and sent for approval. The changes will come into effect once they have been approved.* There is also a notification bar in the content item to inform you that a change is in review.



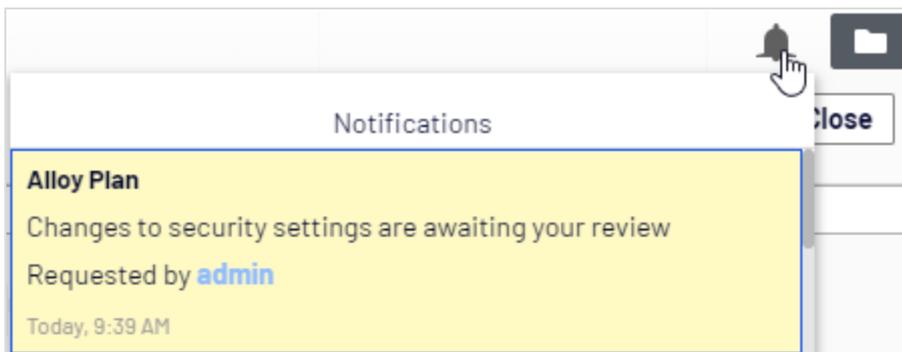
Once a change has been made and it is in review, you can no longer move the item or edit a setting that requires approval until the review request has been approved, declined, or canceled. You can cancel the review, and thereby revert your change, by selecting **Cancel review request** from the **Options** menu.

As soon as the last of the appointed reviewers approves the change, the change automatically comes into effect.

As a reviewer, how do I approve or decline a change?

Note: Depending on how the approval sequence has been set up, you may not be allowed to approve or decline a change you have made yourself, even you are one of the appointed reviewers.

1. When you log in to the Optimizely CMS user interface, you will see a notification if you have a change to approve:

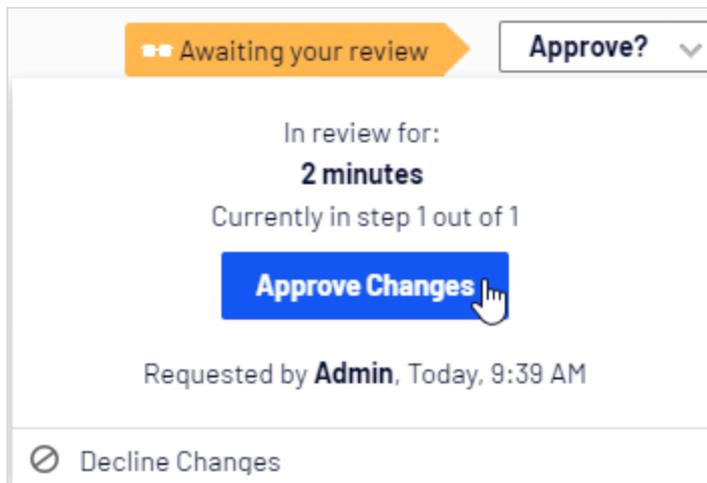


2. Click this notification to see the change detail overview:

Name	Current version	Suggested version
Access Control List	Everyone: Read Product_editors: Read, Create, Change, Delete, Publish, Administer WebAdmins: Read, Create, Change, Delete, Publish, Administer WebEditors: Read, Create, Change, Delete, Publish, Administer	Everyone: Read Product_editors: Read, Create, Change, Delete, Publish, Administer WebAdmins: Read, Create, Change, Delete, Publish, Administer WebEditors: Read, Create, Change, Delete, Publish, Administer

In this view, you can see the old value of the setting and the new value. Greyed out values have not been touched; bold are used for new values, and strike-through for removed values.

3. To approve or decline this change, click the **Options** menu and select **Approve Changes** or **Decline Changes**:



Note: Change approvals does not check if the reviewer has the access rights to perform the proposed change. It only checks if the user who makes the change has the access rights. For example, if you remove the 'Everyone' access rights to a page, Change approvals checks that you have the right to do so, but the reviewer who approves the change does not have to have that right.

Email notifications for change approvals have not yet been implemented, so you are only notified in the user interface when you have a change to review.

Using Content approvals and Change approvals at the same time

When you have used [Content approvals](#) and sent content for review, the content (that is, the specific version of the content) is locked for editing. You can still move the page/block and change the language settings. You cannot change the access rights or expiration date.

When you have used **Change approvals** and sent a change for review, you can still edit the content but you cannot move the page/block or change language settings, access rights, or expiration date.

Projects

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

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

- Use the [projects feature](#). This feature is enabled by default.
- Add the [projects gadget](#) to your user interface, if the projects feature [has been disabled](#) by a developer.

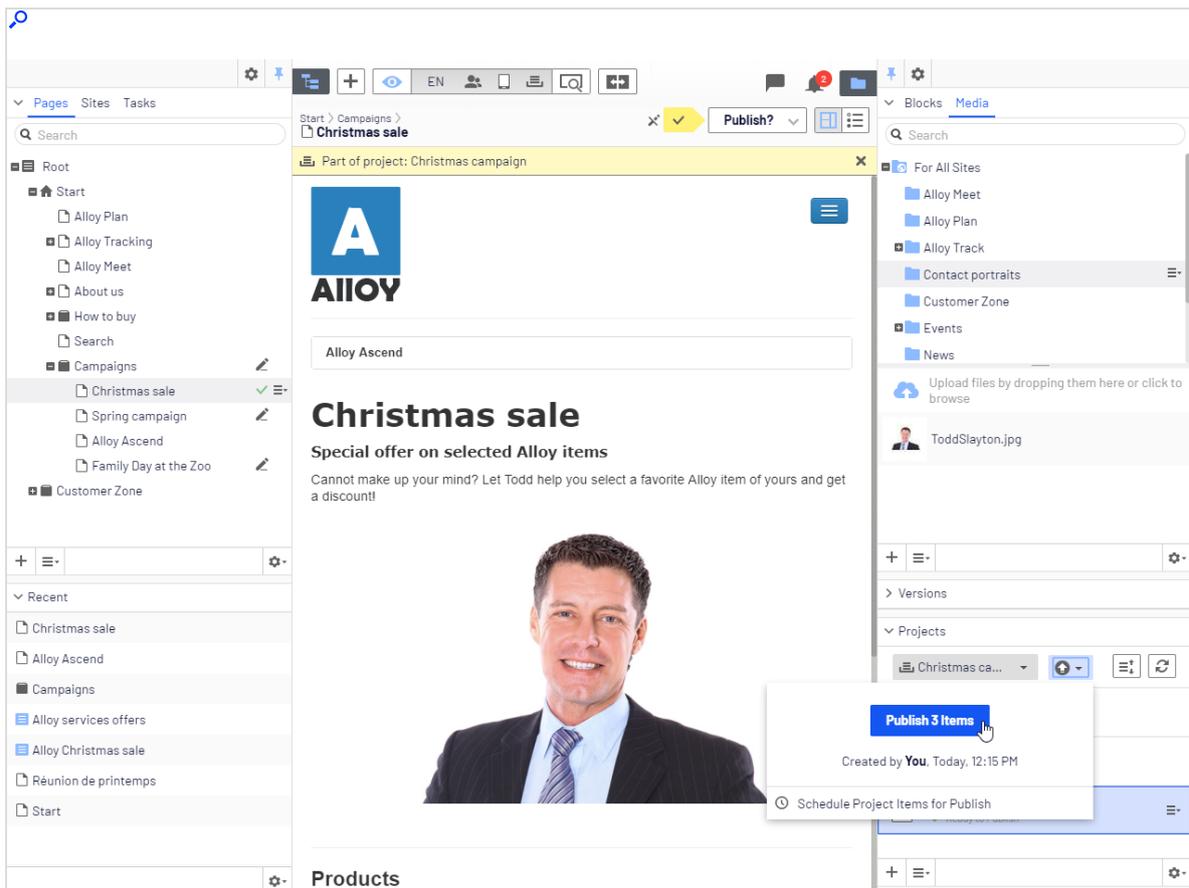
The following table shows a comparison of the two methods:

Projects gadget	Projects feature
Accessible to users who add the gadget.	Accessible to all users unless it has been disabled for the website.
Added to your own user interface; does not affect other users.	Enabled or disabled for the entire site and affects all users.
You need to add content manually to a project.	Content is automatically added if a project is active.
Other editors (not using the Projects gadget) can update content associated with a project.	Content associated with a project can only be updated within the context of the project. (If content is associated to a project, an editor who wants to edit that content needs to have that project active or create a new draft).
When the project is published, the project is obsolete and can no longer be used.	You can continue working with a project even after some or all items are published.
All project items must be set to Ready to	You can publish multiple items that are set to Ready

Projects gadget	Projects feature
publish before the project is published.	to publish and leave items that are not ready for a later time.
There are no collaboration features.	You can collaborate on projects by adding comments to projects and items.

The projects gadget

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



The screenshot shows the Optimizely user interface. On the left, there is a navigation pane with a tree view under 'Campaigns' containing items like 'Christmas sale', 'Spring campaign', 'Alloy Ascend', and 'Family Day at the Zoo'. The main workspace displays a preview of a landing page for 'Alloy Ascend' with the heading 'Christmas sale' and a sub-heading 'Special offer on selected Alloy items'. Below the text is a large image of a man in a suit. On the right side, there is a 'Media' panel showing a list of assets and a 'Publish?' button at the top. A modal dialog box is open in the bottom right corner, featuring a blue button labeled 'Publish 3 Items' and the text 'Created by You. Today, 12:15 PM' and 'Schedule Project Items for Publish'.

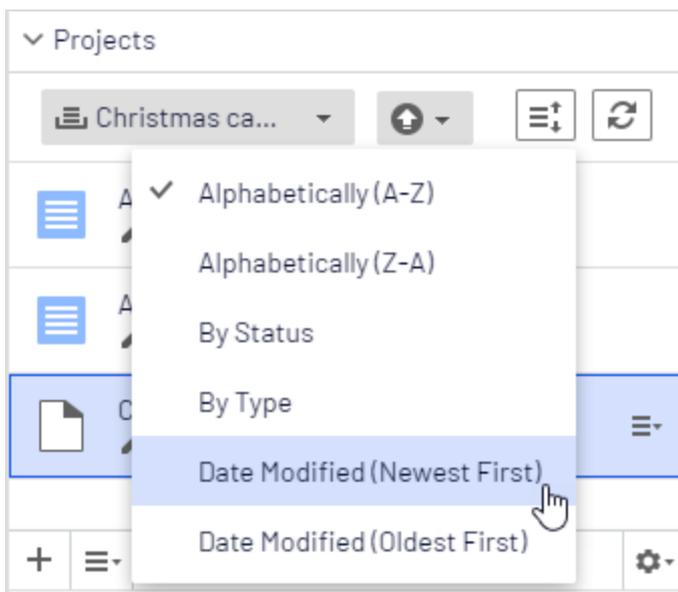
You can create new content or create draft versions of existing content, associate the content items with a project, and then publish the project immediately or schedule it for later publishing.

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

Working with projects

Creating a project and adding content

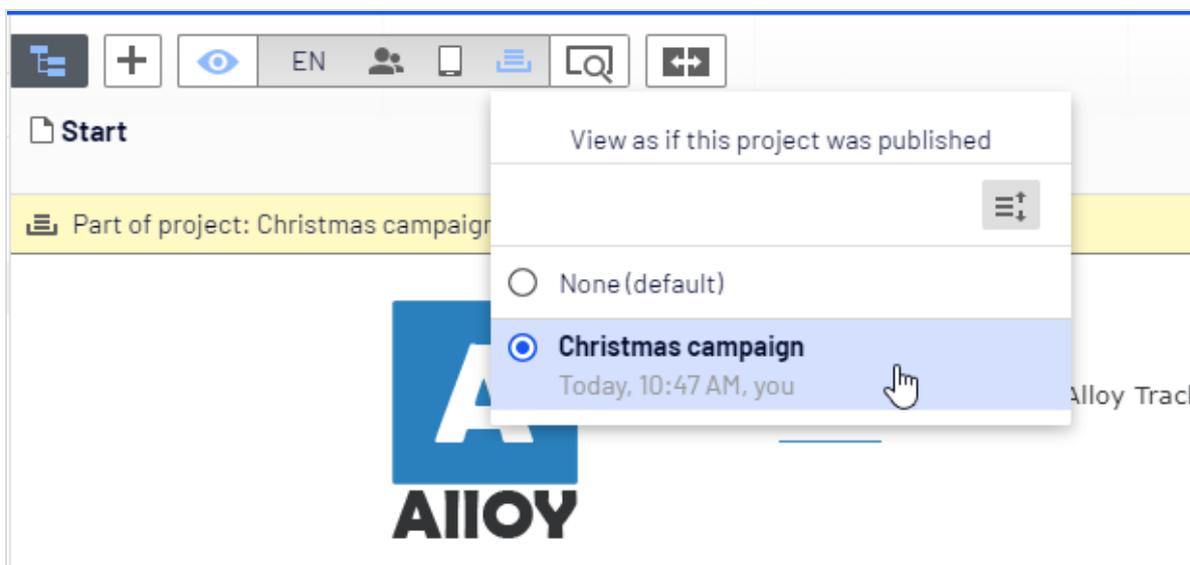
Create a project from the gadget menu and add desired content items through drag and drop. You can prepare the [draft versions](#) of the content items first, and then create the project and add them, or the other way around. Use **Sort** in the context menu to sort content items for a better overview,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



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

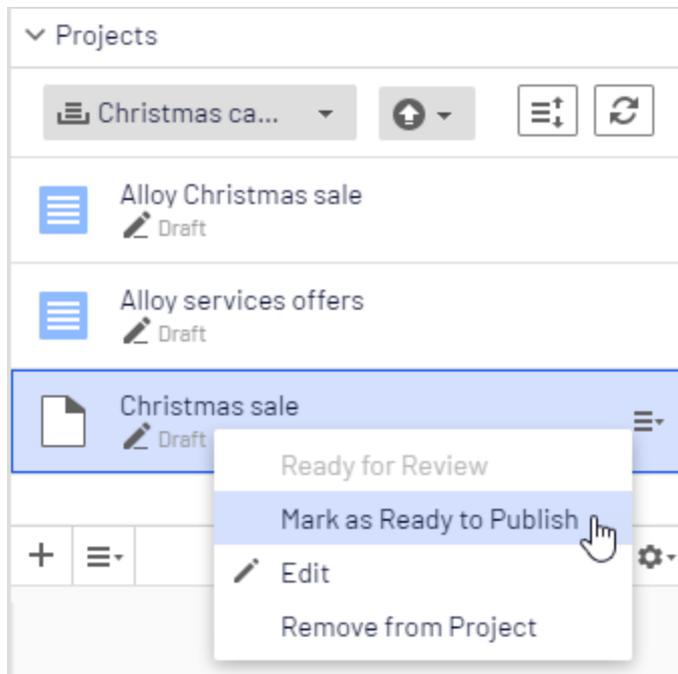
Previewing project content

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



Publishing projects

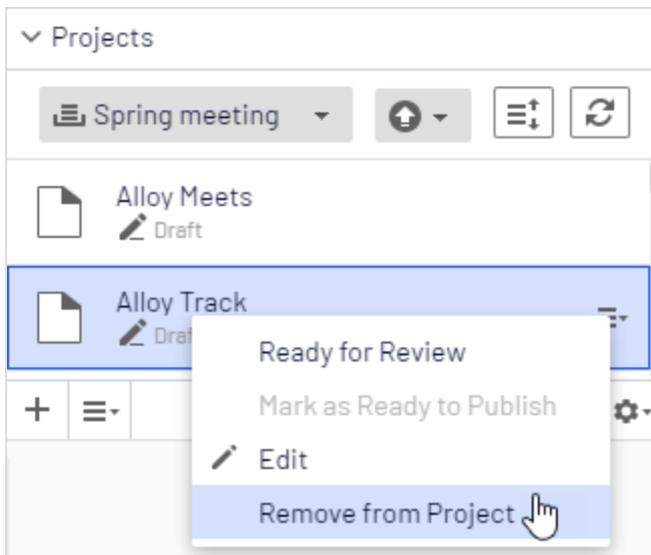
To publish a project, all included items must first be set to status **Ready to Publish**. You can do this for each item from the publishing menu when editing, or from the context menu in the **Project** gadget.



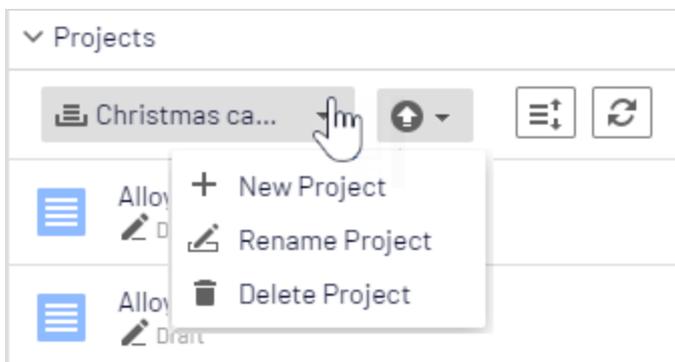
When all items are ready for publishing, you can publish the entire project directly, or [schedule the project to be published later](#) (if you have publishing access rights). If you need to change content in a scheduled project, select **Remove Scheduling and Edit**, change the content and re-schedule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

Removing content and deleting projects

Remove a content item from a project by selecting the item in the projects gadget and then selecting **Remove from Project** from the item's context menu. Removing a content item from a project means that it is no longer associated with the project but it is not deleted from the website.



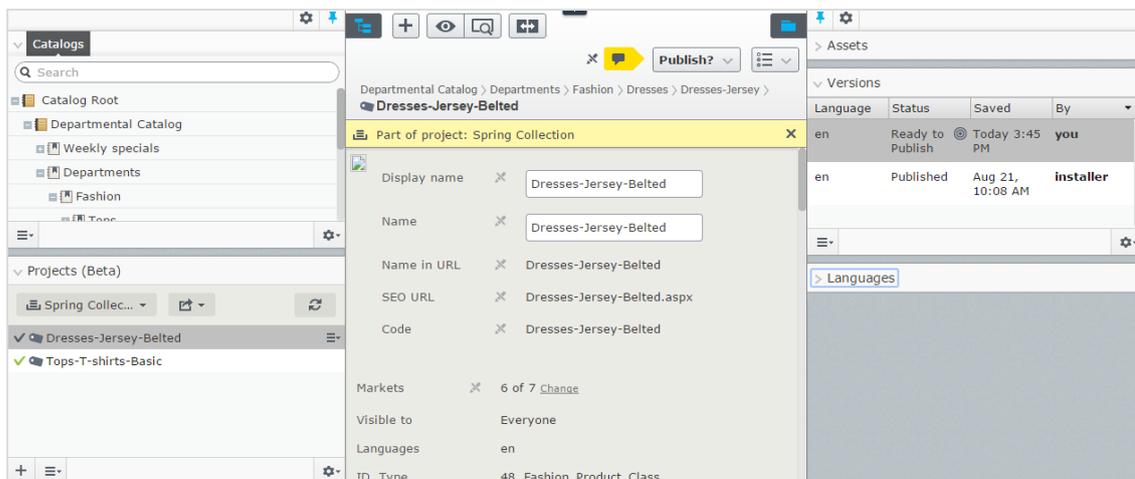
Delete a project by selecting the project in the projects gadget and then selecting **Delete Project** from the gadget's context menu. Projects are permanently deleted, but associated content items remain. When deleting a project scheduled for publishing, you have the option to keep or remove the scheduling for each associated item.



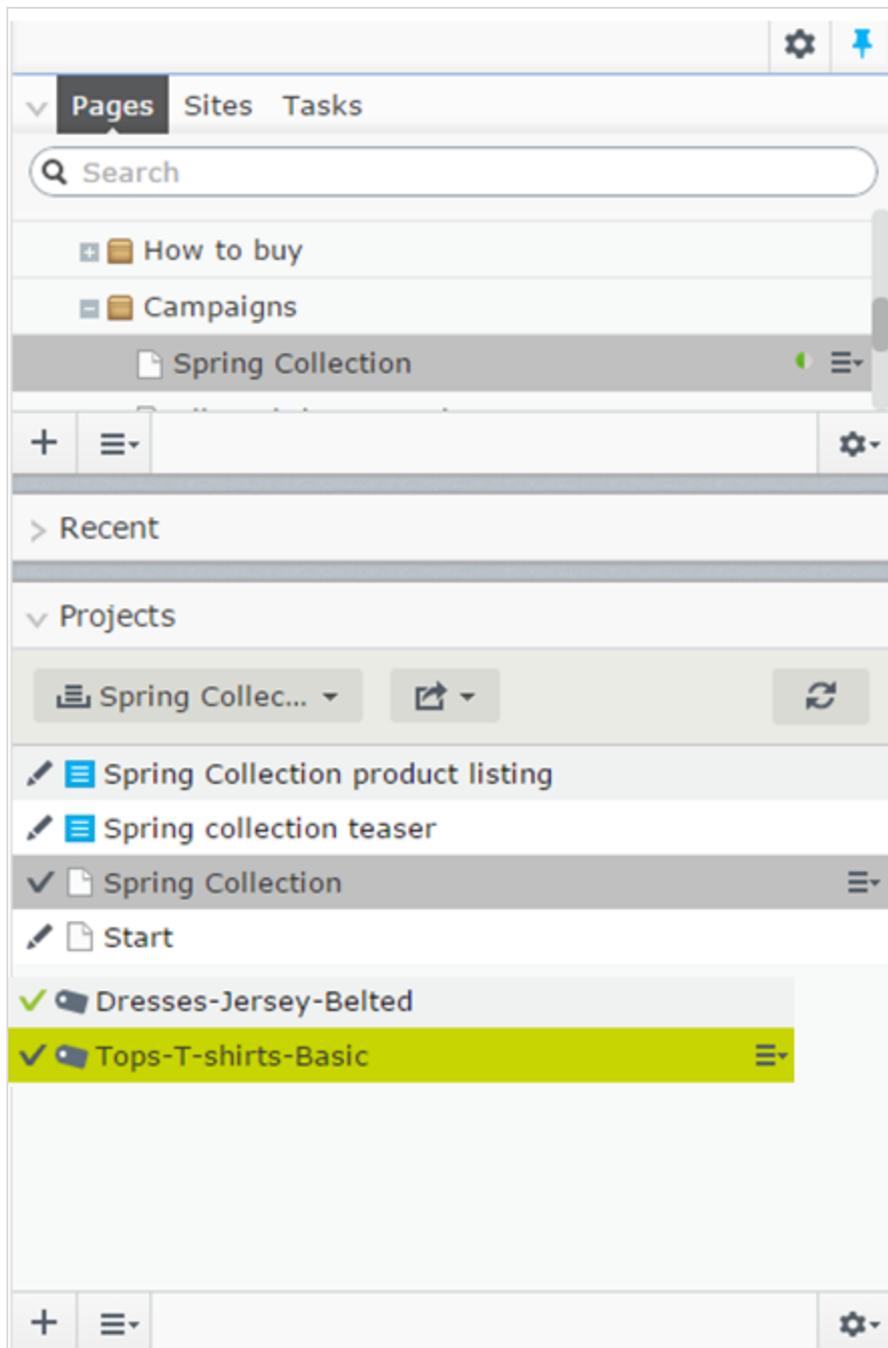
Example: Publishing a campaign using projects

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

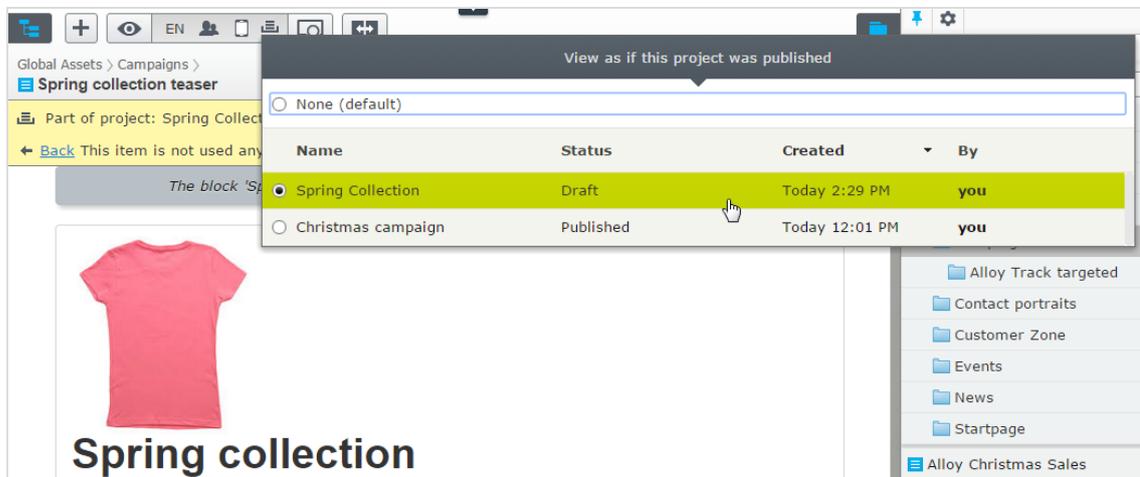
1. In the Optimizely Commerce catalog tree, create a **project** for the campaign and name it *Spring Collection*.
2. Prepare draft versions of the **catalog items** in Optimizely Commerce, create and edit the catalog entries and add product descriptions and assets as desired.
3. When done, drag the prepared catalog entries from the Catalog gadget to the **Project** gadget where you set the products to **Ready to Publish** before they are added to the project, but you can do this later.



4. Switch to the CMS edit view and create the **landing page** for the *Spring Collection*. Add text and assets as needed, and drag the landing page to the *Spring Collection* project.
5. Create a **block listing the products** included in the spring collection, and include it in the landing page. Add the product listing block to the project.
6. Create a **teaser block** to be used on the landing page for promoting the new spring collection, and add the teaser block to the project.
7. Drag the teaser block to the start page, and add the **start page** to the project. The *Spring Collection* project now contains all the items to be included in the campaign.



8. [Preview](#) the content items in the project, edit as needed and set to **Ready to Publish** when done.



9. [Schedule](#) the project to be published on the defined go-live date for the campaign.

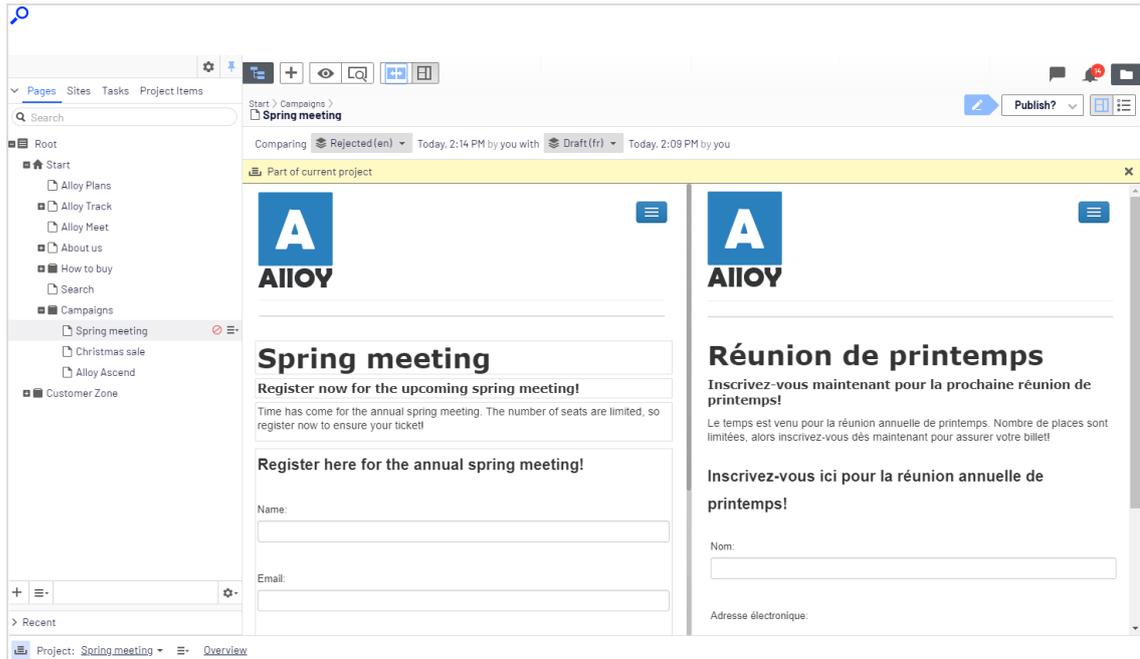
Note: You cannot edit versions of content items that are part of a scheduled project. For example, if you need to update the start page before the scheduled project is published, you need to create a new draft and then publish this. If you need to incorporate the same changes into the scheduled project version of the start page, remove the scheduling to edit.

Example: Managing multiple content language versions using projects

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

1. Create the page and the related forms block in English first.
2. Create a **project** and name it *Spring Meeting*.
3. Add the English versions of the page and the forms block to the project.
4. Enable and activate the desired languages (here French and German) on your website, if not already done. (Must be done by an administrator.)
5. Switch to the French language branch and create a French version for the page and the forms block.
6. Drag the French version of the content items into the *Spring Meeting* project.

- Repeat the previous actions for the German language version. You now have six content items in the project; two for each language version.



- Translate the content items into French and German respectively.
 - Use [compare](#) to display the original English version when translating.
 - Use [preview](#) to verify the different language versions of the content.
- Set all the content items to **Ready to Publish** when done, and publish the project or schedule it for later publishing.

The projects feature

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

Note: The projects feature may be disabled on your site, in which case you do not see the project bar at the bottom of the user

interface and you cannot use the feature.



Video tutorial: [Managing content with the projects feature](#) (5:20 minutes)

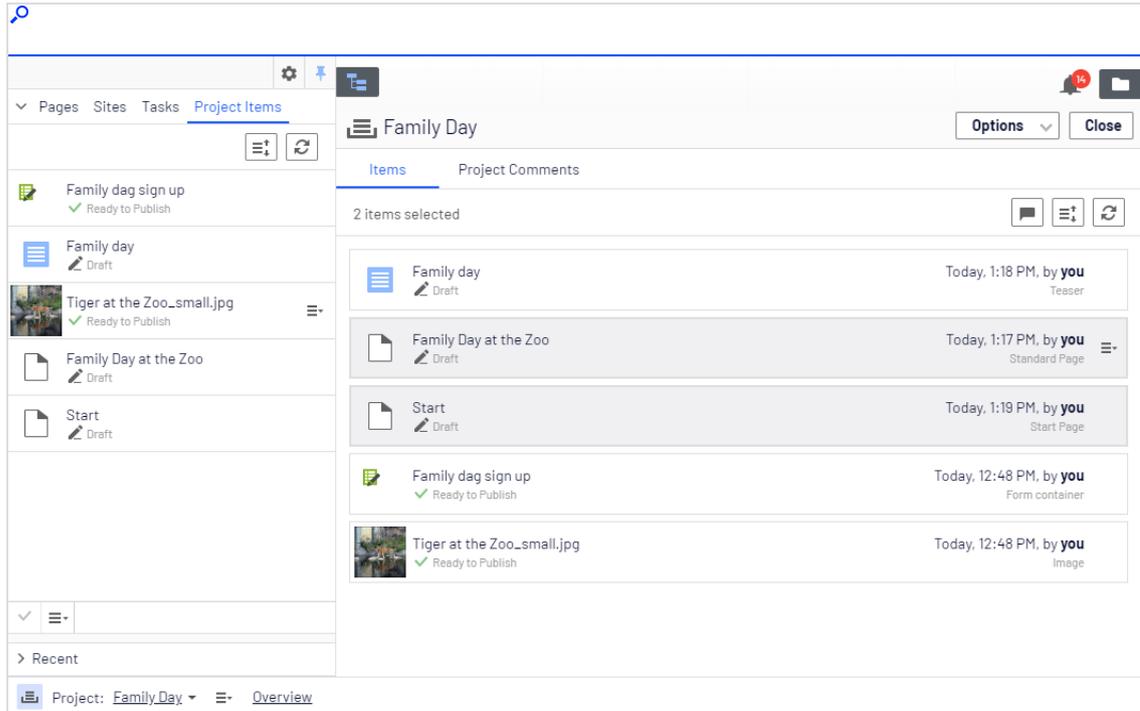
Project features:

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

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

- You can also manually associate items with a project by dragging and dropping them from the page view into the project overview.
- Content associated with a project is locked for editing if another project is active.
- A **version** of content is associated with a specific project. This means that you can have a published version of an item not associated with any project; one draft of the same item belonging to a *Summer campaign* project, and another draft belonging to a *VIP campaign* project.
- You can add, remove and update existing items even if some or all of the items within a project are published.
- You can collaborate with other editors by adding comments, and replies to comments, to project items and to projects.
- The project interface consists of three main parts; the project bar at the bottom, the

overview and the project items navigation pane to the left.



Projects user interface

Project bar

A project bar is displayed at the bottom of the CMS window indicating if a project is active or not.

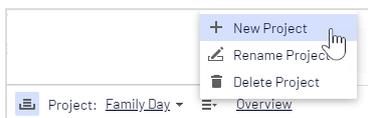


When you first access the edit view with the projects feature enabled, no project is selected in the project bar. When you select a project, it is preselected the next time you open the user interface.

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

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

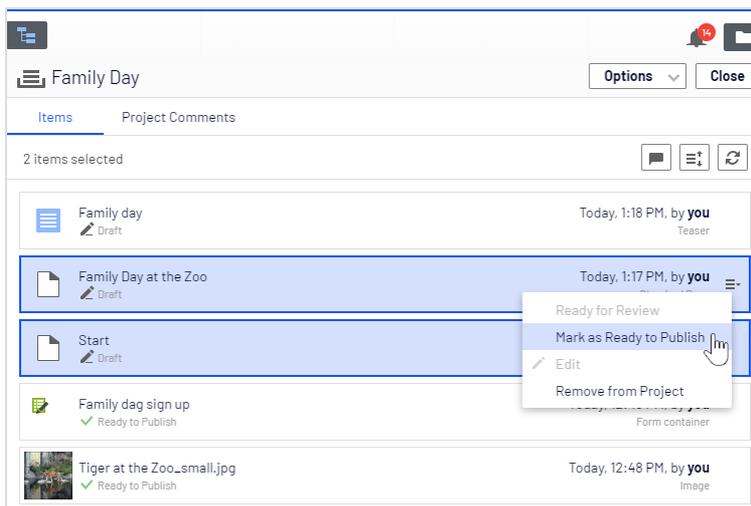
From the context menu on the project bar, you can create, rename and delete projects.



If you delete a project, associated items are not deleted but are no longer associated with a project.

Project overview

From the projects bar, you can open an overview that displays content items associated with the active project.



The overview shows details such as name, [content status](#), content type, and time and date for latest change of each content item.

Each content item in the overview has a context menu from which you can set the item to **Ready to Publish**, open it for editing and remove it from the project, providing you have **Edit** access rights. The context menu button appears when you hover over an item.

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

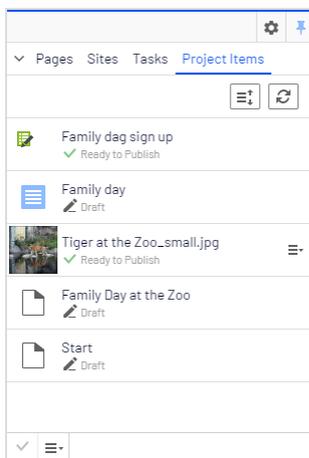
From **Options** in the overview, you can publish all items that are set to **Ready to publish** immediately or [schedule them](#) for publishing at a later time.

Show comments opens a view where you can select a project item and see a list of events connected to the item. You can add comments on each event and also reply to comments, see [Collaboration between editors](#).

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

Project items navigation pane

The project items navigation pane provides quick access to items in the project. Double-click an item to open it.



Each content item in the project items pane has a context menu displayed when you hover over an item; the menu options are the same as those in the project overview. You can select multiple items in the list the same way as in the project overview.

Versioning when working in projects

Tip: Add the versions gadget to your user interface if you are working with multiple drafts and projects to see [a list of the different versions](#).

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

The Versions gadget shows you which project each version is associated with, which is especially useful if you are working with multiple projects for the same content:

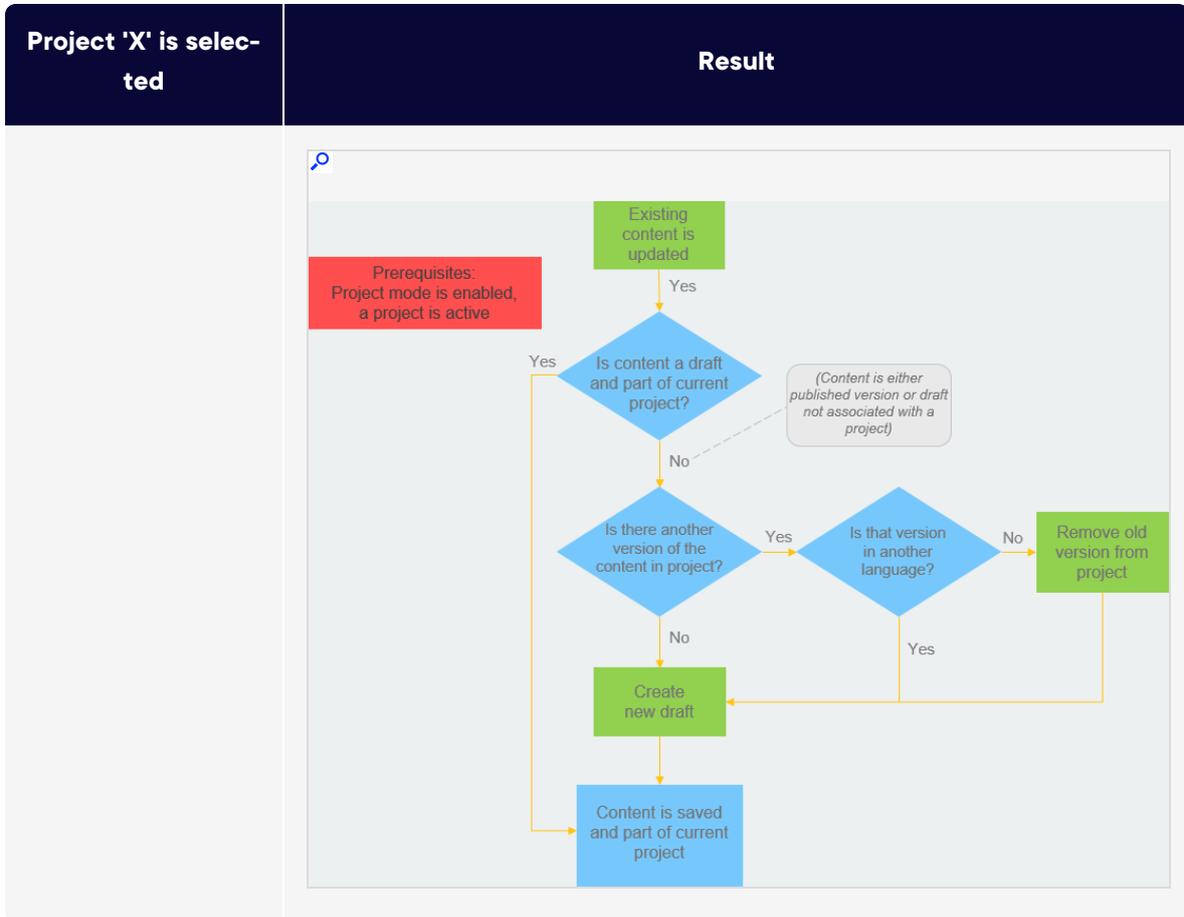
Language	Status	Saved	By
en	Draft (Project 2)	Today, 8:27 AM	you
en	Draft (Project 1)	Today, 8:27 AM	you
en	Ready to Publish	Aug 6, 11:05 AM	you
en	Draft	Jul 28, 2:25 PM	you
en	Published	Jul 19, 10:35 AM	installer

You can only have one published version, so if you publish another version of the page (that is, a version that is not associated with the project) after the version associated with the project, the project version is not published anymore and therefore set as **Previously published** in the project overview.

When you open an item and have a project active, Optimizely CMS displays the version associated with the active project. If you open an item and do not have a project active, Optimizely displays the version that is set as primary. You can see which version is the primary in the versions gadget; the **primary version** is marked with a target symbol . The primary draft is not necessarily the latest version. See also: [Setting the primary draft](#).

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

Project 'X' is selected	Result
and you create new content from scratch:	The draft is created and added to the active project automatically. Because this is the only version of the content, it is set as the primary draft.
and you update existing content:	<p>Is the content a draft and associated with the active project?</p> <p>Yes: The draft is saved and still associated with the active project. Whichever version was the primary draft before is still the primary draft.</p> <p>No, the content is a published version or a draft not associated with the active project: A new draft is created and is associated with the active project. The previous version is still the primary draft.</p> <p>Note: If there is a previous draft within the project in the same language, the previous draft is replaced with this new draft as only one version can be associated with a project. The previous draft remains in Optimizely as a draft but is no longer associated with a project. A draft of the same project item but in another language is not replaced as it is viewed as another version of the item. This means that you can have one draft in English and one draft in French of page Z in the project X, but you cannot have two drafts in English of that page.</p>



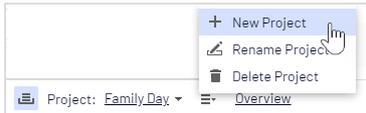
None (use primary drafts) is selected	Result
and you create new content from scratch:	The draft is created and set as primary draft.
and you update existing content:	<p>Is the content a draft?</p> <p>Note: It does not matter if the content is associated with a project or not; versioning works the same in this case.</p> <p>Yes: The draft is updated and saved. If it was associated with a project</p>

None (use primary drafts) is selected	Result
	<p>before you edited the draft, it will still be associated with the project afterwards. Whichever version was the primary draft before is still the primary draft.</p> <p>No, the content is not a draft: A new draft is created and is not associated with a project. It is set as the primary draft.</p> <p>Note: If the updated content is a media file and auto publish is turned on, the media is automatically published at this stage.</p>

Working with projects

Creating a project and adding content

You create a new project from the context menu on the [project bar](#).

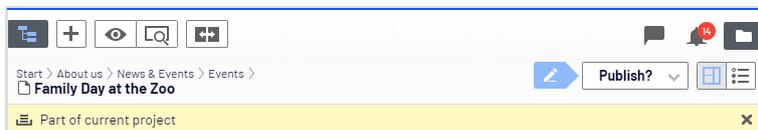


When you create the project, it is automatically set as the active project. To add a content item to the active project, make an editing change (such as creating a page, updating existing content, uploading an image and so on), and the content item is automatically associated with the project. You can also drag and drop items from the navigation or asset panes into the project overview to associate them with a project.

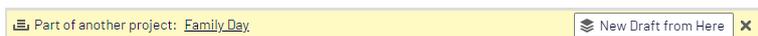
Note: A specific content version can only be part of one project. If you try to add the same version to another project, you are prompted to create a new draft. If you choose to create a new draft, the new version is then added to the project.

Editing content in projects

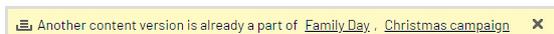
You will see a notification if *the version you are working on* is associated with the active project.



Content not associated with the active project but with another project is locked for editing. However, even if that version is locked for editing, you still can create a new draft with the **New Draft from Here** button in the yellow toolbar. That draft is associated with the active project, or to no project at all if **None (use primary drafts)** is selected.



If you open a version of an item that is not associated with a project but has other versions that are associated with projects, you will see a notification with links to these projects.



If you want to make a change that should not be associated with the active project, you have to select **None (use primary drafts)** or another project from the project bar. When **None (use primary drafts)** is selected in the project bar, you can create drafts, publish content and so on, as long as the content version is not associated with a project.

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

Uploading media to projects

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

Note: If you have a project active when you upload a media file, you must manually publish the media file, even if your system is configured to automatically publish media as soon as it is uploaded.

Previewing project content

The [preview option](#) in the top menu lets you browse through the website as if the project were published. If you click **preview** , you preview the active project; to preview another project, change the project in the project bar. Previewing a project shows you the draft associated with the project or, if there is no draft associated with the project, the published version.

Collaborating on projects

You can add comments on project items in the project overview and, for example, ask other editors to review an item. This feature is described in [Collaboration between editors](#) in the CMS Editor Guide.

Publishing project items

From the project overview, you can publish multiple items that are set to status *Ready to Publish*. You can set items to **Ready to Publish** from the publishing menu while editing an item, from the context menu in project overview, or from the Project Items navigation pane. You can select multiple items and set them to **Ready to Publish**, both from the overview and the navigation pane. You publish the content items associated with the project, not the project itself.

Image: Publishing menu

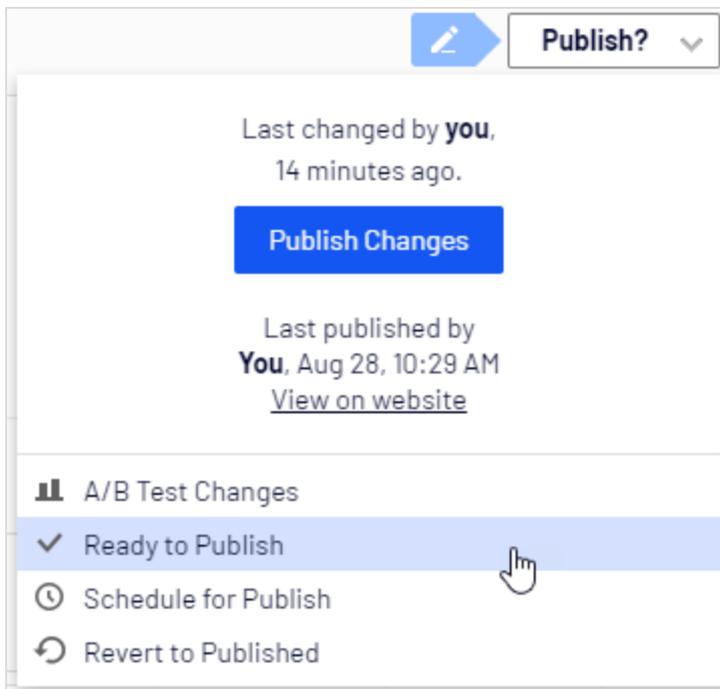


Image: Context menu, overview

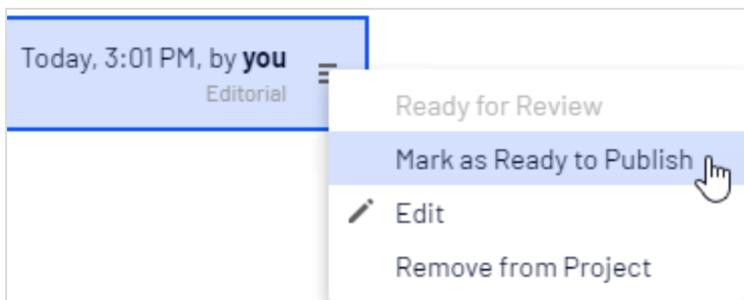
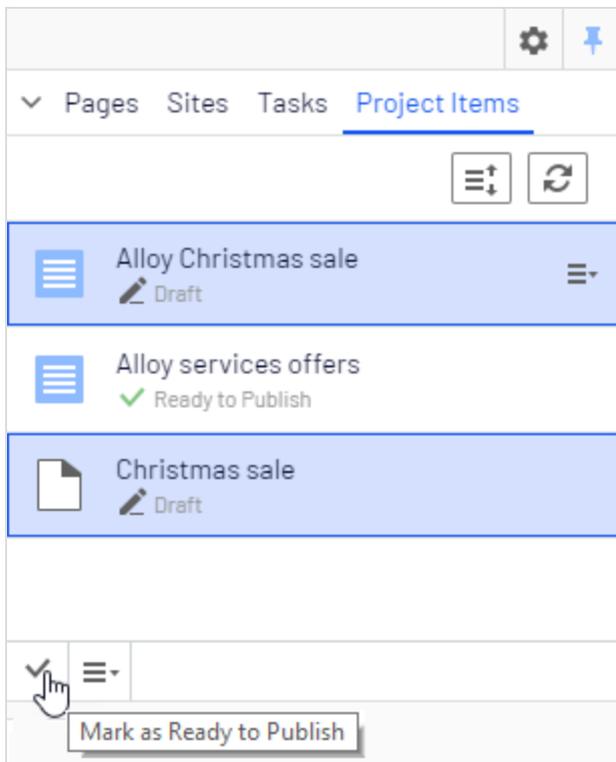
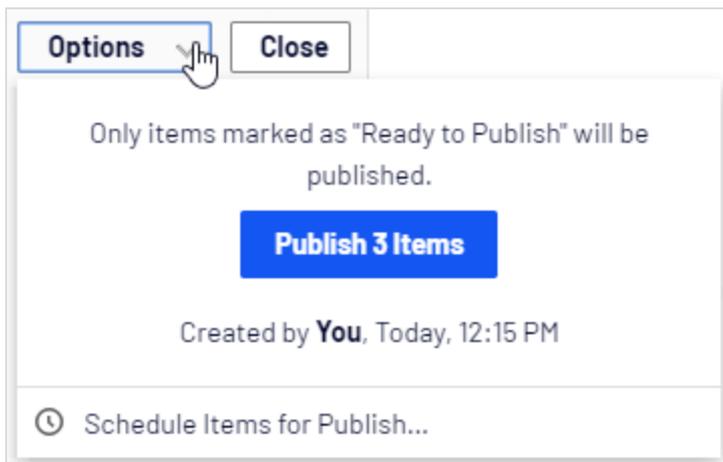


Image: Project Items tab in navigation pane



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



Note: If the items in a project were scheduled for publishing and you add new items to the project, the new content is not scheduled for

publishing automatically. You must specifically set the new content to scheduled time of publishing if you want it to be published at the same time as the other items in the project.

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

You can continue working with a project after it is published.

Removing content and deleting projects

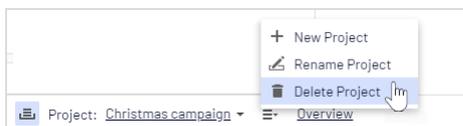
Removing content from projects

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



Deleting projects

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



Examples of using the project functionality

Publishing a customer event using projects

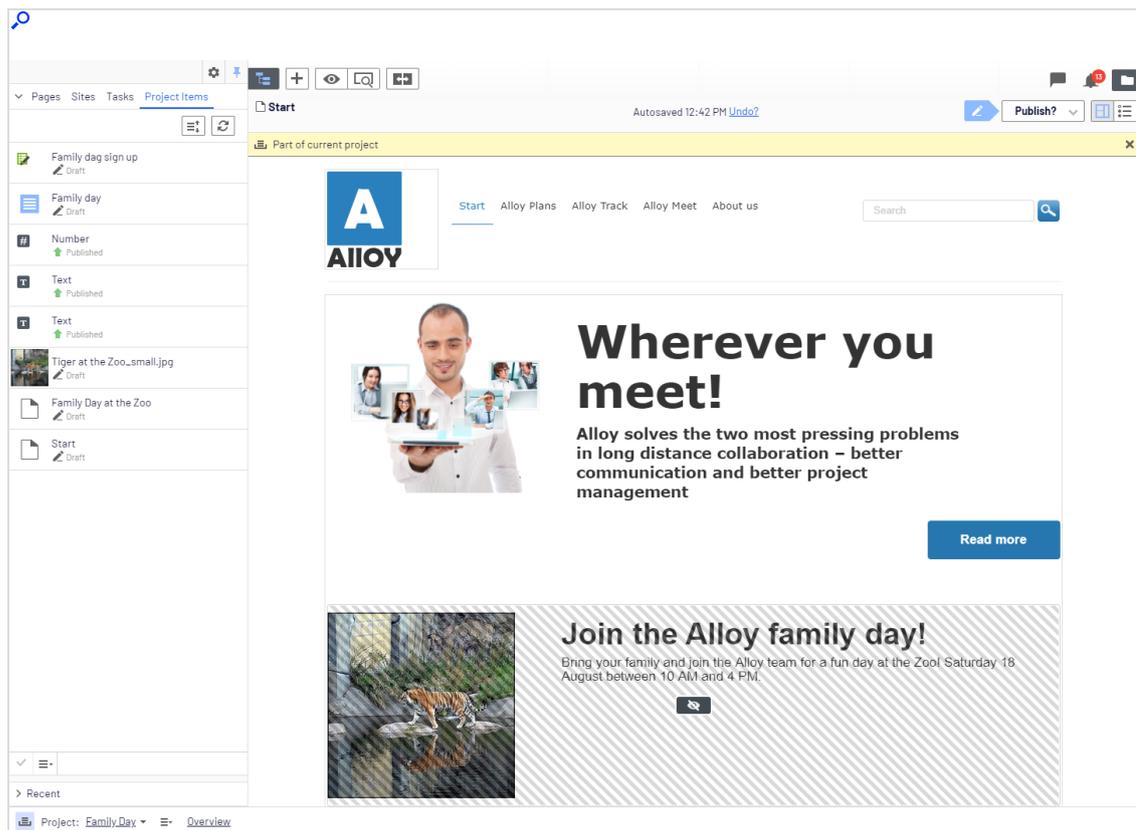
This example creates an invitation to a customer event, including a registration form (using a block), a thank you for the registration-page, and a teaser block for the start page. All content items for the event are scheduled to publish at the same time.

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

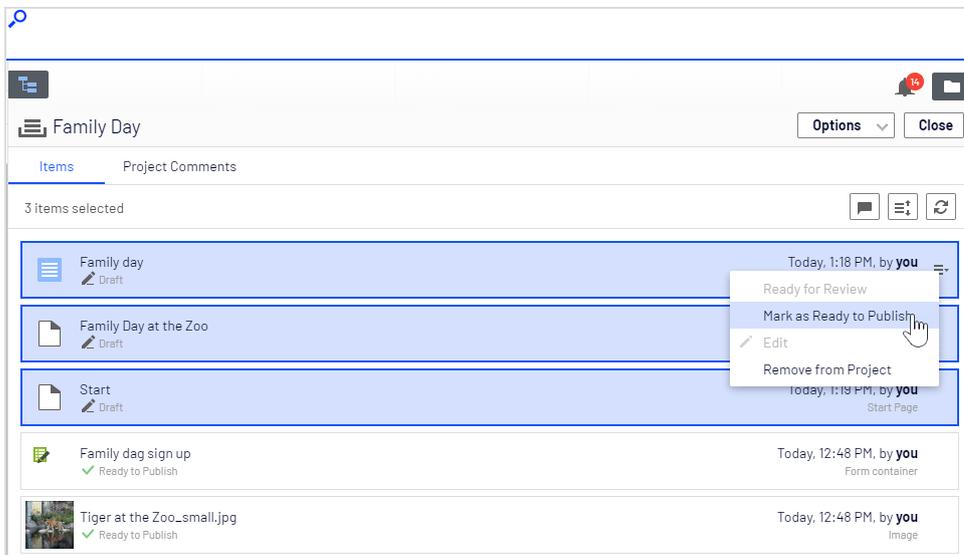
The screenshot displays the Optimizely CMS interface. On the left, a 'Project Items' sidebar lists several content items: 'Family dag sign up' (Draft), 'Family Day at the Zoo' (Draft), 'Number' (Published), and two 'Text' items (both Published). The main editor area shows a page titled 'Family Day at the Zoo' with a yellow header bar indicating it is 'Part of current project'. The page content includes a large heading 'Family Day at the Zoo', a sub-heading 'Bring your family and join the Alloy the team for a fun day filled with', a paragraph of introductory text, an 'Event details:' section with 'When?', 'Where?', and 'Who can come?' information, and a 'Sign up now to receive your tickets!' section with a registration form labeled 'Name'.

3. Prepare a thank you-page.
4. Create a registration form using the built-in form functionality or the Optimizely Forms add-on. Set up the form so that a visitor who registers for the event is directed to the thank you-page.

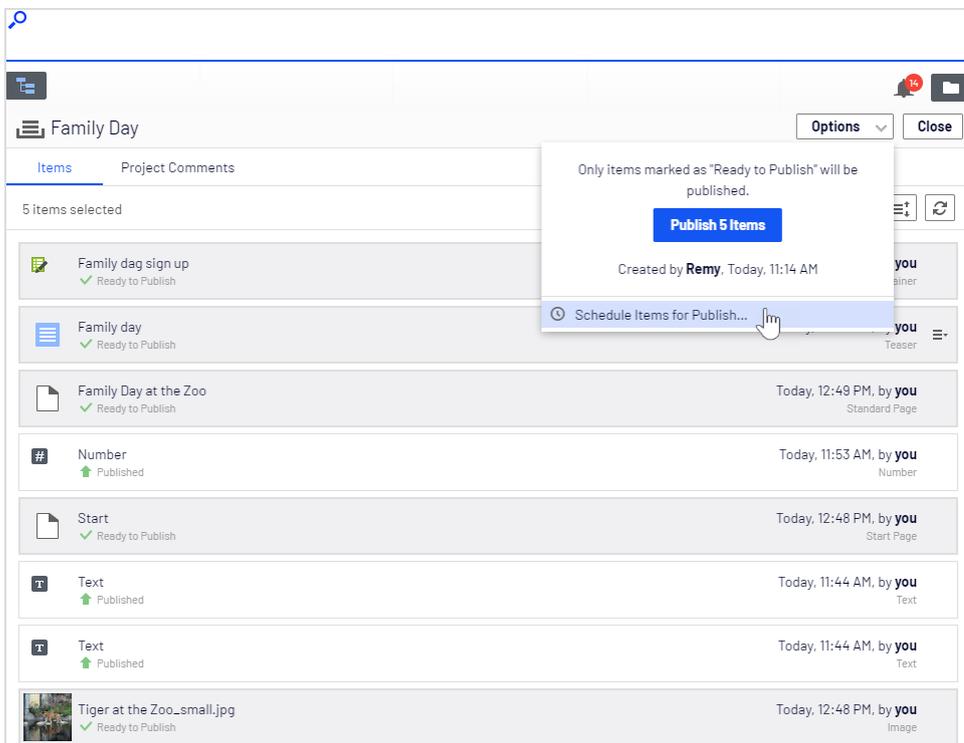
5. Create a teaser block to use on the start page for promoting the customer event and drag it to the start page. The *Customer event* project now contains all items related to the event.



6. Preview the pages by clicking the preview button  .
 - Does the start page contain the teaser?
 - Does it lead to the customer event detail page?
 - Fill in the form and make sure that you are directed to the thank you-page.
7. Go to the overview and select all items by pressing Shift on your keyboard and selecting the top and the bottom items.



8. From the context menu of one the items, choose **Ready to publish** and all items are ready to be published.
9. Select **Options > Schedule Items for Publish** in the overview.



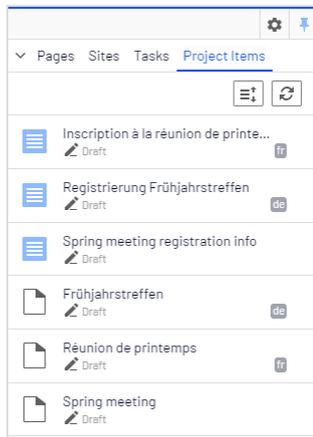
10. Select *1 August at 11 AM* and click **Select**.

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

Managing multiple content language versions using projects

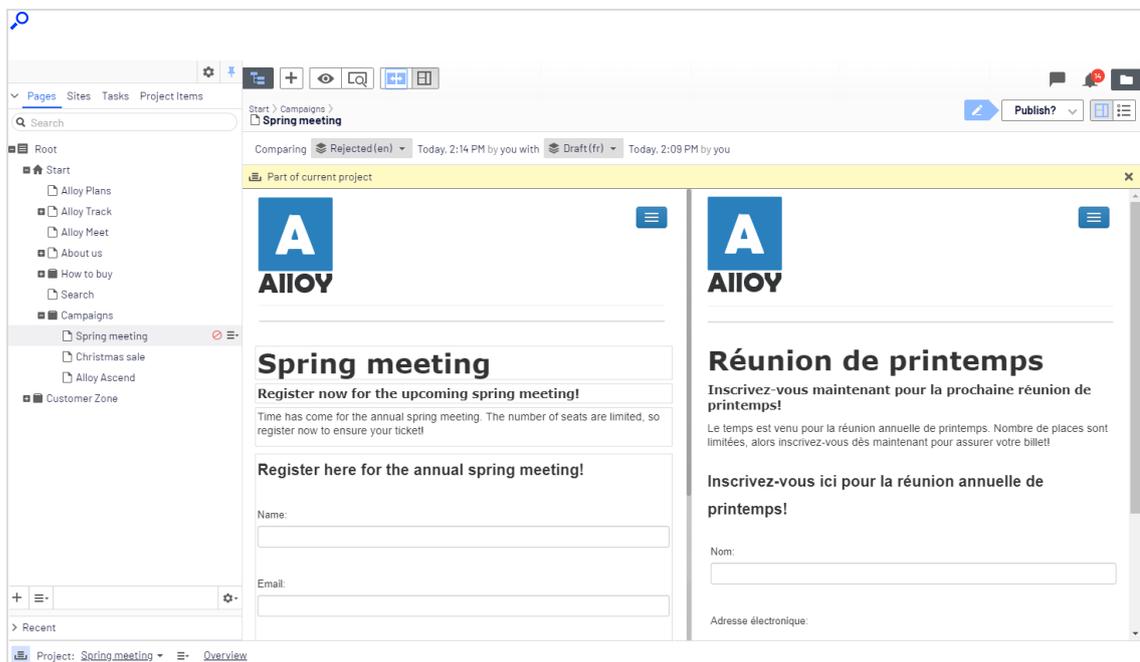
This example creates a page with a registration form block for an event. The included items need to be available in English (the original website language), French and German, and you will manage the translation using a project.

1. Create a project and name it *Spring Meeting*.
2. Create the page and the related forms in English first. They are automatically associated with the project.
3. Enable and activate the desired languages (here French and German) on your website, if not already done. (Must be done by an administrator.)
4. Switch to the French language branch and create a French version for the page and the forms block.
5. Repeat the previous actions for the German version. You now have six content items in the project, two for each language. You can see all six items in the Project Items navigation pane.

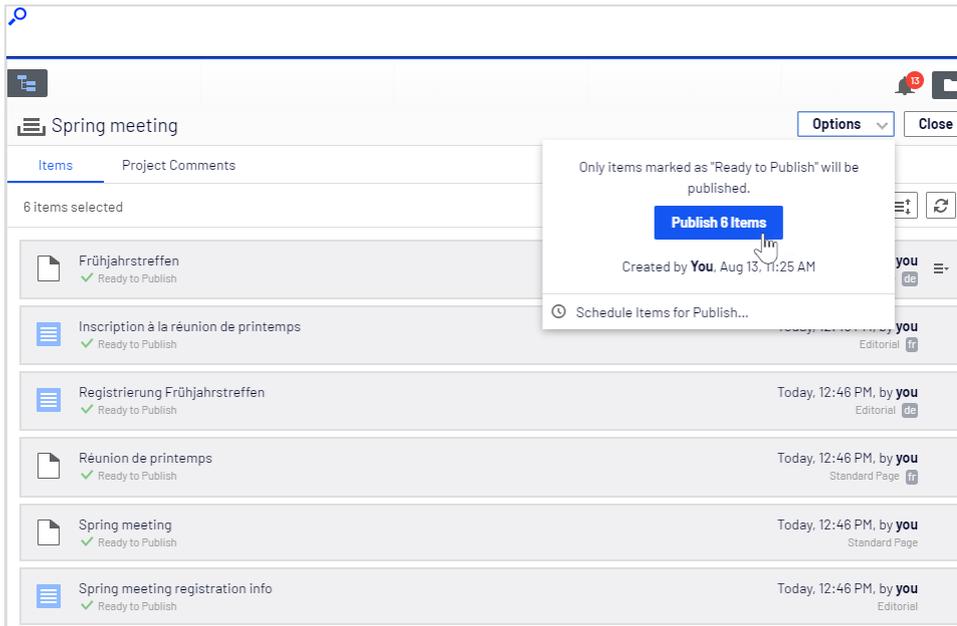


Note: A language code appears for items in other languages. In the image above, the English site is selected under **Sites**; therefore, items in English are not marked with a language code.

- Translate the content items into French and German respectively. Use [compare](#) to display the original English version when translating. Use [preview](#) to verify the different language versions of the content.



7. Set all content items to **Ready to Publish** when done, and publish the project or schedule it for later publishing from **Options** in the project overview.



Reports

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

Reports for CMS content

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



Link Status



This report displays links that could not be reached. This could for example be due to a page being moved, or a site shut down, or that the target link cannot be read at the moment.

Report Criteria

Search start page ...



Number of Hits: 1
Items per Page ▼

Page Name	Broken URL	Link Status	Broken Since	Last Checked
Legal information	 http://wrold.episerver.com	Name resolution failure	Today	Today
1				

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

The following sample reports are available for Optimizely CMS:

Report	Description
Not published pages	Displays unpublished pages that have a change date within a specified time span.
Published pages	Displays pages that have a publish date within a specified time span.
Changed pages	Displays pages that have a change date within a specified time span.
Expired pages	Displays pages with stop publish date within a specified time span.
Simple addresses	Displays pages with a simple address .
Link status	Displays links that could not be contacted in the link check scheduled job.

Some reports rely on scheduled jobs running in the background for generating report data; see [Scheduled jobs](#) in the CMS Administration User Guide.

Reports in Commerce

You can use reports in Optimizely Commerce to follow-up on sales performance, or to monitor inventory stock information for products. See [Reporting](#) in the Commerce user guide, if you have a website with Commerce installed.

Search

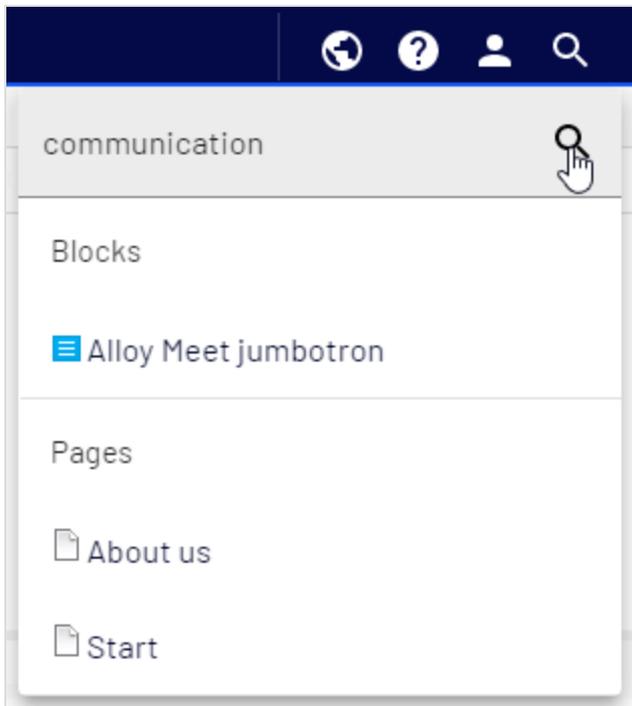
The Optimizely platform has sophisticated search functionality that lets you search through different types of website content. You can search for content pages, blocks, files, community objects, and products, if Optimizely Commerce is installed. The search results are based on access rights, so users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

To build advanced search features based on visitor behavior, customized filtering and faceted content navigation, you can use Optimizely Search & Navigation; see the Optimizely Search & Navigation User Guide. It is included in the Optimizely Cloud services; for on-premises installations it requires a specific installation and license.

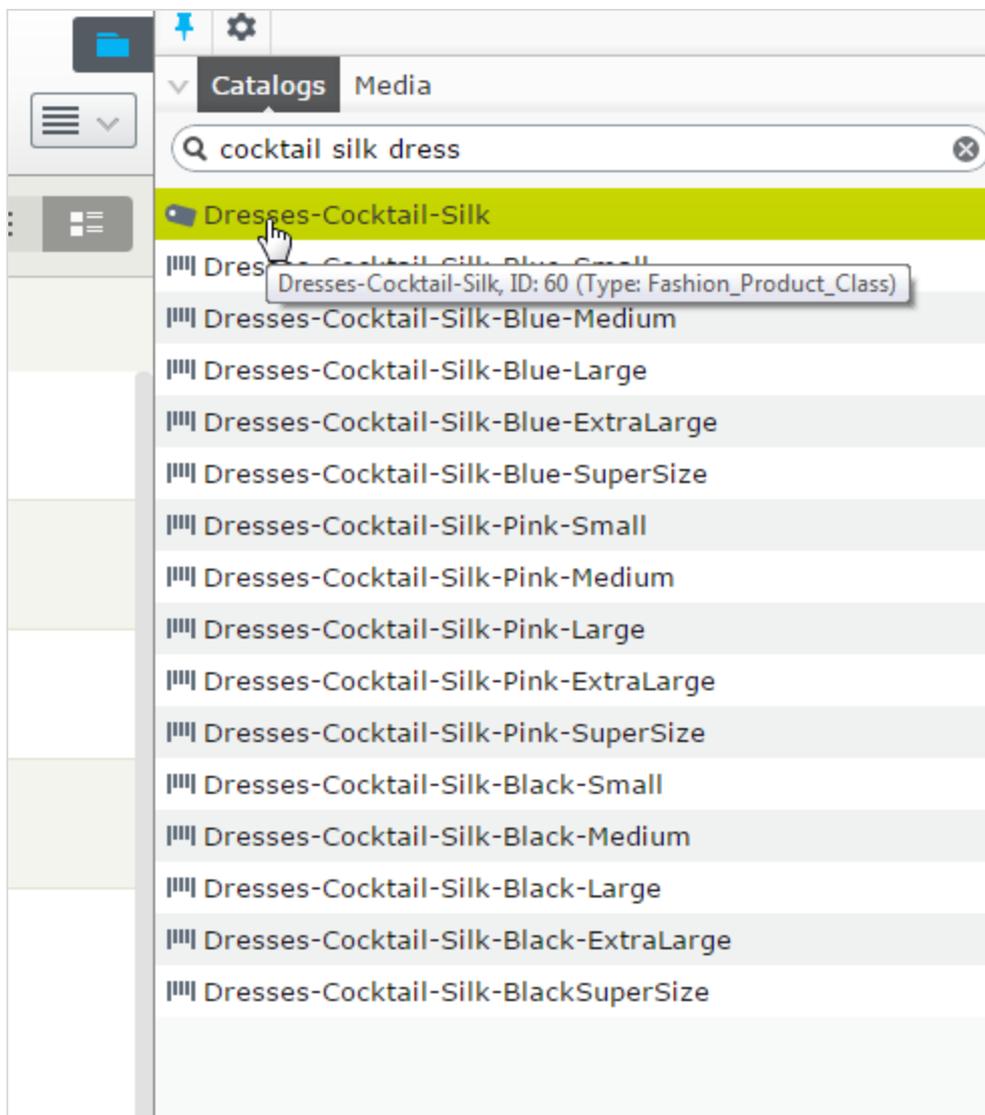
Search options

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

- When editing, the **global search** is available in the upper right part of the top menu. Depending on the configured search providers, this option can search all types of content on the website: pages, blocks, files, and catalog content if you have Optimizely Commerce installed.



- When editing, a search option is available at the top of the navigation and assets panes, and in the [link dialog box](#). This option searches for content in the panes and related dialogs.



- Searching in the CMS edit view is described in the [Finding content](#) topic.
- Site visitors can usually search content through a search field and a search page on the front-end site, as in the Optimizely sample templates.

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

Search tips

- Enter a few carefully selected keywords separated by space. If need be, narrow down your search query by adding keywords. For example: *optimizely product project*.
- If you know a page ID, search for the page by entering the ID in the search field.
- When searching for specific phrases, combine keywords using quotation marks. Example: “*optimizely search tips*”.
- The search function is case-insensitive, so you can use both uppercase and lowercase letters. Example: *New York* and *new york* return the same result.
- You can use the boolean operators AND and OR.
 - AND means *I only want documents that contain both/all words*. Example: *optimizely AND search* returns documents with both words.
 - OR means *I want documents that contain either word*. Example: *optimizely OR search* returns documents with either *optimizely* or *search*.

Sorting search results

The sorting of search results is determined by the search algorithm. Often, filtering is applied to the results, which can be based on many factors, such as categorization of content.

Configuring search

Optimizely search has configuration options that are managed from the administrative interface in Optimizely CMS. See the [technical documentation on Optimizely World](#) for information about search functionality, configuration possibilities, and integration interface.

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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 getting the fastest time to value.

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