Episerver CMS

Editor User Guide

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Episerver CMS Editor User Guide

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Table of contents

Introduction **9**
Features, licenses and releases 10
Images and screenshots 11
Notes 11
Copyright notice 11
CMS 12
Content management features 12
Roles and tasks 13
Visitor and customer 13
Community member and moderator 13
Recipient 13
Website owner 13
User 14
Administrator 14
Developer 15
What's new? **16**
Release notes 16
Archived documentation 19
Getting started **20**
Logging in 20
Accessing features 20
Navigation 20
Next steps 21
User interface **22**
General features 23
Panes 24
Left-hand navigation pane 24
Right-hand assets pane 25
Editing 26
Real-time Updates 28
Network problems 28

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WebSocket support 28
My settings 29
Add-ons 30
Working in On-page editing view 31
Example: Editing a page through on-page edit 32
Editing additional properties 32
Working in All properties editing view 33
Global properties 34
Basic info properties 34
Tabs 35
Commerce-related content 39
Assets 39
Folders 40
Media 42
Blocks 45
Finding content 54
Creating content 57
Creating a page 57
Creating a block 58
Commerce-related content 58
Editing content using the TinyMCE rich-text editor 58
Formatting 59
Keyboard shortcuts 60
Adding links 62
Creating a link 62
Link properties 67
Linking to catalog entries 70
Adding and editing images 71
Adding images to content 71
Finding the image location 74
Editing images 74
Removing images from content 77
Working with web forms 78
Collaboration between editors 79
Adding comments 79
Commenting on content items 79
Commenting in projects 81
Replying to a comment 85

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Editing a comment or reply 85
Deleting a comment or reply 85
Managing content 86
Commerce-related content 86
Optimizing content to improve search 86
Working with multiple languages 87
Enabling content languages 87
User interface languages 87
Commerce and multiple languages 87
Episerver Find and multiple languages 88
Translating content 88
Fallback languages 95
Visitor groups 99
Personalization with visitor groups 99
Applying personalization 99
Editing and removing personalization settings 101
Providing access to content using visitor groups 106
Monitoring visitor group activities 106
Personalizing Commerce content 106
Personalization using add-ons 106
Previewing content 107
Comparing versions 109
Comparing content 110
Comparing properties 111
Setting access rights from edit view 112
Structuring the website 114
Page tree 114
Moving, copying and removing pages 115
Sorting page order in menus 116
Deleting and restoring content 118
Working with versions 122
Publishing actions 122
Creating drafts and autosaving 122
Undoing and reverting to published 123
Previewing and comparing 124
Publishing 124
Setting Ready to Publish 124
Setting Ready for Review 125
Approving content 125

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Scheduling for later publishing ... 126
Removing scheduling and creating new drafts ... 126
Managing versions ... 127
Viewing versions ... 127
Setting the primary draft ... 128
Editing and deleting versions ... 129
Managing language versions ... 129
Republishing a version ... 130
Unpublishing content ... 131
Setting expiration of content ... 131
Working with shared content ... 133
Mark as being edited ... 133
Permanently mark as being edited ... 133
A/B testing ... 133
How it works ... 134
Starting an A/B test ... 136
Viewing a running A/B test ... 140
Picking a winner ... 142
Managing A/B tests ... 144
Viewing completed and archived tests ... 145
Setting default values for A/B testing ... 146
Controlling the publishing process ... 147
Content approvals ... 150
How it works ... 150
Working with approval sequences ... 158
Commenting when approving and declining content ... 161
Change approvals (Add-on) ... 161
How it works ... 162
Setting up an approval sequence ... 163
As an editor or administrator, how does Change approvals affect me? ... 163
As a reviewer, how do I approve or decline a change? ... 164
Using Content approvals and Change approvals at the same time ... 165
Projects ... 166
The projects gadget ... 167
The projects feature ... 174
Reports ... 190
Reports for CMS content ... 190
Reports in Commerce ... 191
Managing gadgets ... 192
Adding gadgets ... 193

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Rearranging gadgets 193
Removing gadgets 193
Built-in gadgets 194
Gadgets for the dashboard 194
Gadgets for the panes in edit view 194
Add-ons 195
Managing dashboard tabs 195
Tabs 195
Dashboard gadgets 196
Search 199
Built-in search features 199
Search options 199
Search tips 202
Sorting search results 202
Configuring search 202
Extended search with Episerver Find 203
Index 204

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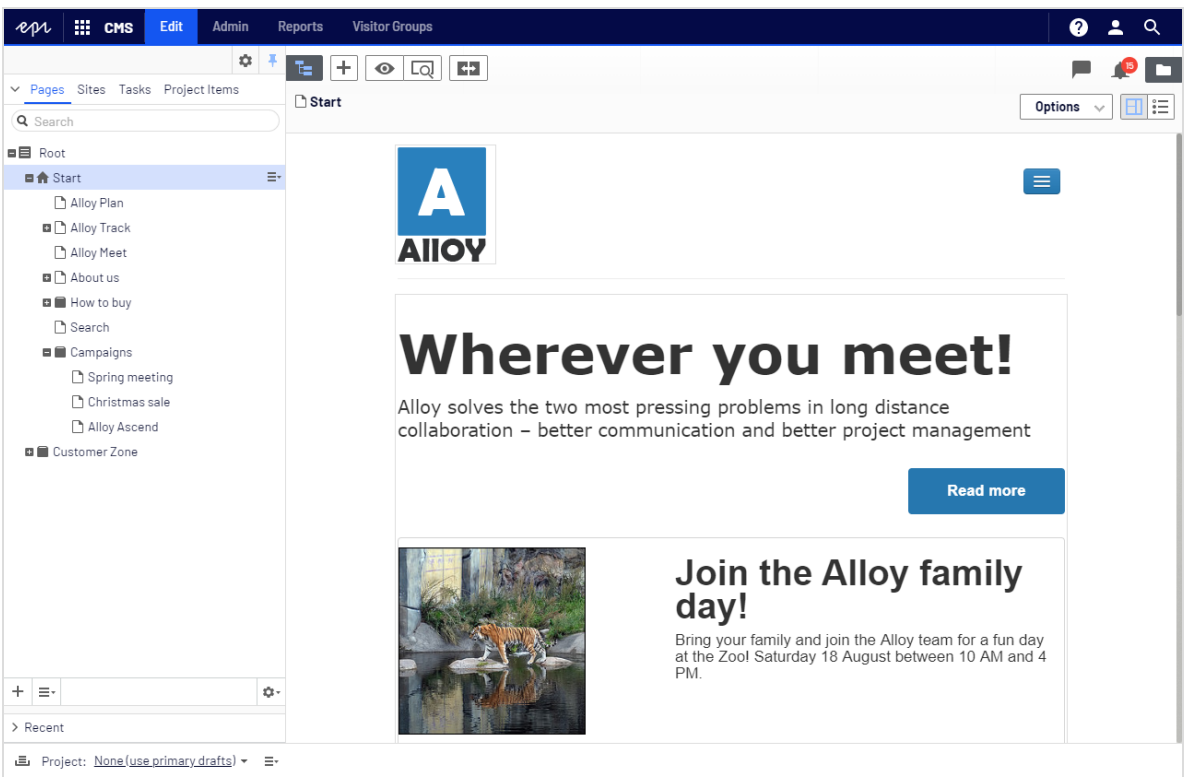
Introduction

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

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

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

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



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Features, licenses and releases

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

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

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

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

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

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

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

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

Add-ons extend the Episerver capabilities with features like advanced search, multi-variate testing, and social media integration. Some add-ons are free, others require license activation. Add-ons by Episerver are described in the online help.

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

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Images and screenshots

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

Notes

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

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

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

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

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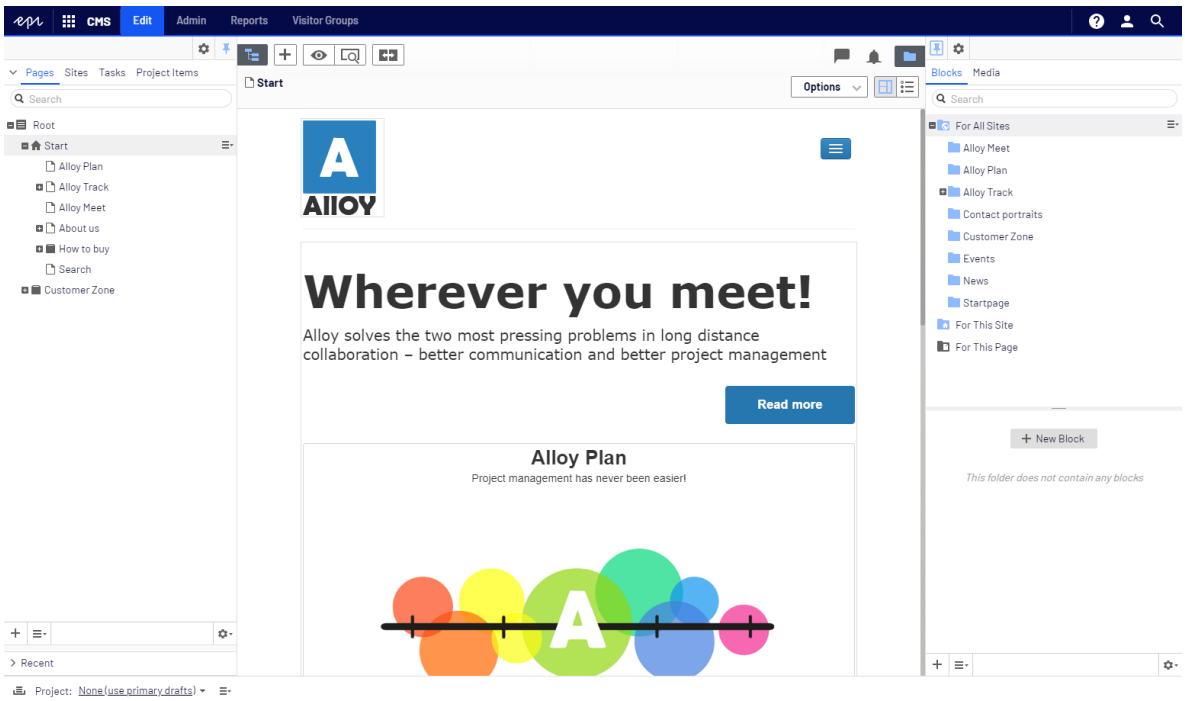
CMS

Episerver 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

Episerver CMS contains many features supporting editors in their daily work, below are examples of some common tasks.

- Creating pages and content blocks
- Adding images
- Linking content
- Content collaboration
- Managing content versions
- Content approvals

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- Working with multi-language content
- Managing permissions

Roles and tasks

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

Visitor and customer

A *visitor* is someone who visits a website to find information or to use services. If the website is an e-commerce site, the visitor can be a *customer* with purchasing intentions. Purchasing on an e-commerce website can be done "anonymously" (payment and shipping details provided), or by registering an account. Visitors may also contribute to website content as community members, which usually requires registration of an account profile.

Community member and moderator

Content may be added by visitors or *community members*, if social features and community functionality are available for the website. This content includes forum and blog postings, reviews, ratings and comments, in which case there might be a need for monitoring this type of content on the website. Monitoring can be done by an editor, or a specific *moderator* role for large websites and online communities.

Recipient

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

Website owner

A *website owner* is someone with overall business and/or technical responsibility for the content and performance of one or more websites. May monitor website activities such as page conversions, customer reviews or sales progress. Rarely creates content but can be involved in the approval of content created by others. A website owner may also have administrative access, and be the owner of mailing clients used for organizing campaign mailings.

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User

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

Content editor

A *content editor* is someone with access to the editorial interface who creates and publishes content on the website. Content editors with good knowledge of the website content work with search optimization for selected content in search results. Editors may also want to follow-up on content with unusually high or low conversion rate to update or delete this content.

Marketer

A *marketer* creates omnichannel campaigns and content with targeted banner advertisements to ensure that customers get a consistent on-site experience. Furthermore, the marketer monitors campaign KPI[1]s (key performance indicators) to optimize page conversion. A marketer with good knowledge of the website content may also optimize search for campaigns, and promote content using personalization features.

Merchandiser

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

Administrator

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

[1] Stands 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.

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Developer

A *developer* is someone with source code access and programming skills. Developers work with website configuration, implementation, maintenance and development of new functionality. They create the rendering templates for content and product catalogs, configure e-commerce settings, and manage indexing and customized search features. Developers may also install integrations and 3rd party extensions. Developers may be associated directly with the organization owning the website, or with an external partner company.

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What's new?

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

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

This release of the Episerver User Guide describes features available in Episerver as of **September 5, 2019**, see release notes below for update history. See Archived documentation in the online version of the user guide for previously released user guides.

Release notes

Released	Area	Features and updates
September 5, 2019	CMS	The CMS user interface has been rebranded. The screenshots have been updated to reflect this. (update 274)
	Commerce	Order meta classes and fields appear on the Order Management screen. Several updates to the Order Management screen, including the ability to choose a market before selecting a cart, and the ability to create a new cart. (update 279)
	Campaign	Use the new **Structured data** tab in the General settings paragraph in the Template Kit to add structured data to your mailing. Add content in the **Gmail Promotions tab** section that Gmail should prominently display in the Gmail Pro-

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Released	Area	Features and updates
		motions tab.
	Marketing Automation	New global settings for Marketing Automation connectors. Change to Microsoft Dynamics CRM connector configuration screen (**Domain** is out; **Region** is in), and **Organization** name can be the Unique name or the friendly name.
August 21, 2019	Campaign	The deliverability preview lets you check your mailing before dispatch, whether the contents are displayed correctly and whether your mailing has been classified as spam by the most popular email providers. In the Performance Dashboard, you can display KPIs[1] as a bubble chart. (update 278)
	Insight	Visitor groups was added to the filter types for viewing profiles.
August 7, 2019	Campaign	The IP warming topic provides information about how to build a good reputation with internet service providers as an email sender.
July 24, 2019	Campaign	In the recipient history, you can view the third-party ID, the pseudonymized recipient ID. See Recipient history. (update 274) In the Basics section, you can find the new Deliverability basics section with information and best practices for successful deliverability.
July 10, 2019	Forms	The form element types **Rich text** and **Submit but-**

[1] Stands 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.

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Released	Area	Features and updates
		ton can now be dependent on other fields, which means they can be displayed or hidden depending on a visitor's previous input. See Dependencies tab in Form element types. (update 269)
	Commerce	The Order Management screen lets you convert any cart to a purchase order and accept payments. See Order Management screen. (update 271)
	Campaign	If you are using Spryker as an e-commerce platform, you can integrate Episerver Campaign to connect e-commerce and mailing activities. See Spryker integration.Added menu entries Episerver Insight and Episerver Reach to Campaign start menu.
June 13, 2019	CMS	An administrator can require a review requester to add a comment when sending an item for review. See Managing approval sequences and Collaboration. (update 265)
	Campaign	The Episerver Campaign User Guide is a section in the Episerver User Guide.
	Marketing Automation connectors	Support for multiple instances of a connector, to use for example in separate regions. See Episerver Pardot and Episerver Marketo. (update 244)

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Archived documentation

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

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Getting started

This topic describes how to log in to an Episerver website, access features and navigate the different views. The login procedure may be different from what is described here, depending on how your website and infrastructure are set up. The examples described here are based on a "standard" installation of Episerver with sample templates.

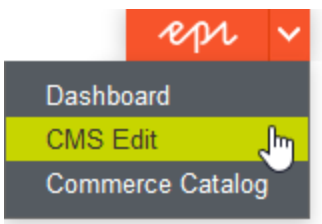
Logging in

As an editor or administrator, you usually log in to your website using a specified URL, a login button or link. Enter your user name and password in the Episerver login dialog, and click **Log In**.

Accessing features

What you are allowed to do after logging in depends on your implementation and your access rights, since these control the options you see. When logged in, the Episerver quick access menu appears in the upper right corner.

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



Navigation

Pull down the **global menu**, available at the very top, to navigate around. The menu displays the different products and systems integrated with your website. Select **CMS** (for example) to display available options in the submenu.

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Note: Your menu options vary depending on your access rights. These user guide examples assume that the user has full permissions to all functions in Episerver.

Next steps

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

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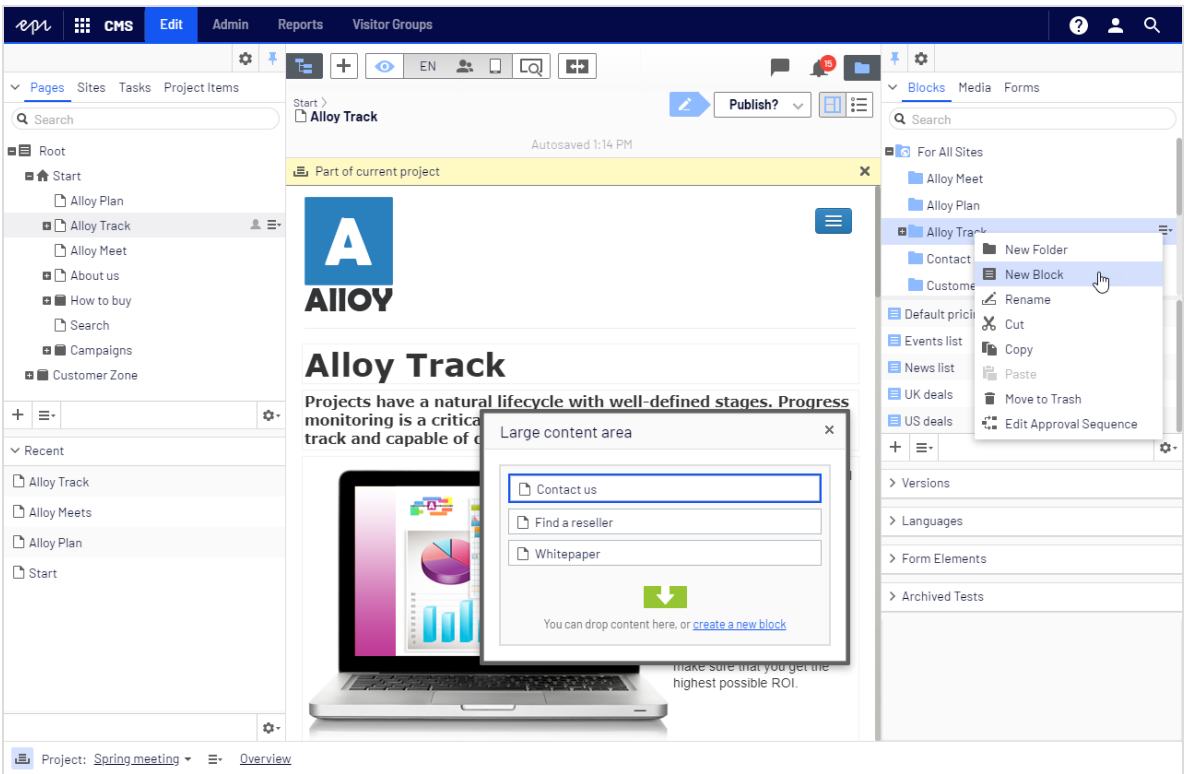
User interface

> **Note:** The Episerver user interface is flexible allowing developers to plug-in customized features when implementing websites. This description refers to a "standard installation" of Episerver without customizations.

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



The **global menu** provides access to other areas of the Episerver platform. You can also access this user guide, your user settings and a global search from the global menu.

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

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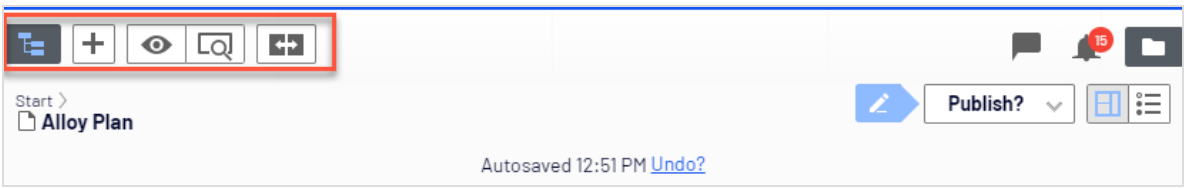
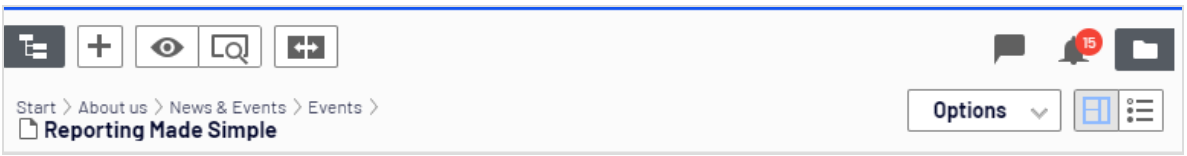
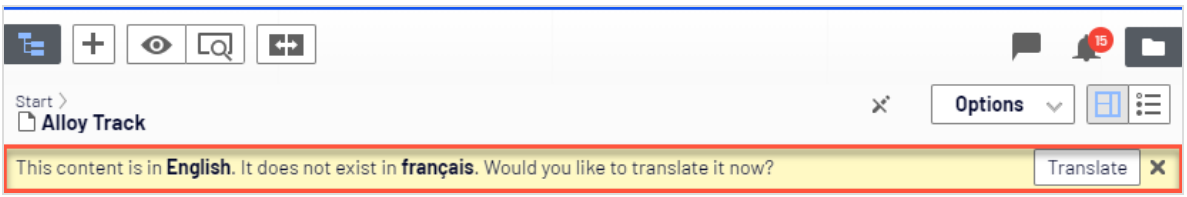


The page information area below the toolbar displays the page name, the path to the page and when it was last autosaved. If it is possible to undo the latest changes you did to the content, there is also an **Undo** link.



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



General features

- **Context-sensitive actions**. Some features are only available in certain context. The toolbar (for 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 re-arrange the page tree structure using drag-and-drop.
- **Tooltips**. Hover the mouse 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.

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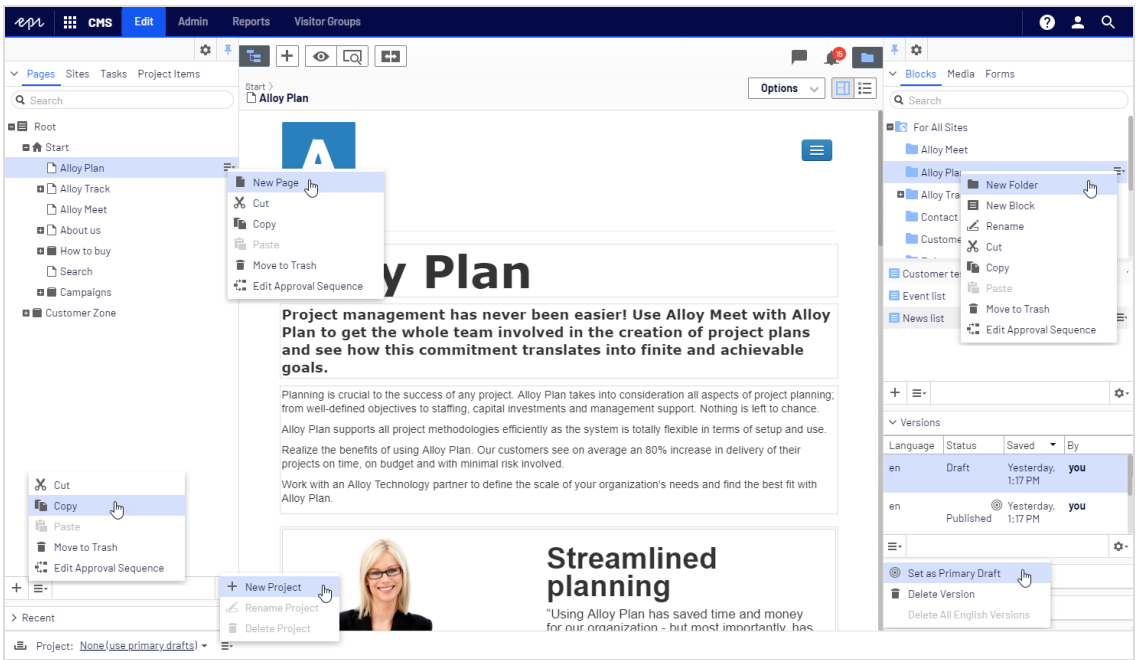
- **Support for time zones**. Publishing actions in the edit view are done in your local time zone, whereas administrative actions are based on server time.
- **Context menus** are available in many areas, such as in the panes, the page tree and in item listings. The menu displays different available 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.

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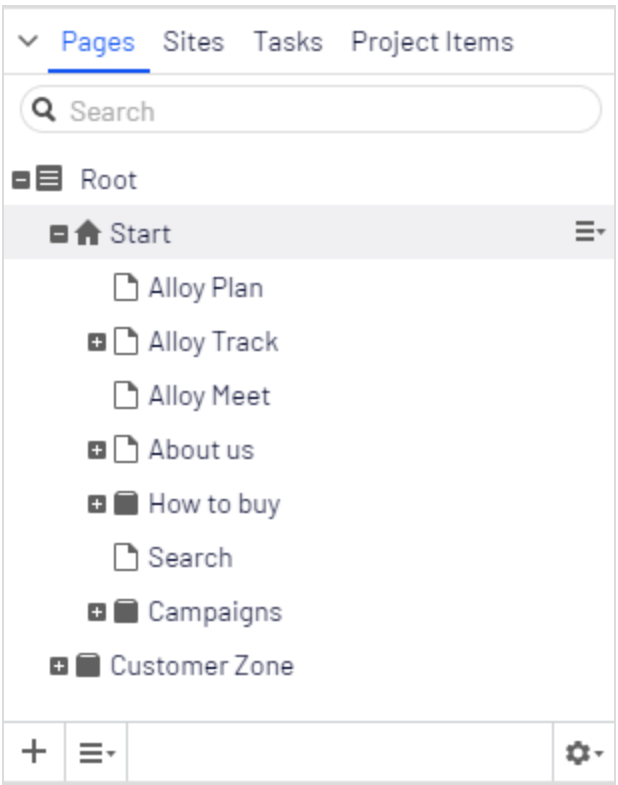

Right-hand assets pane

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.

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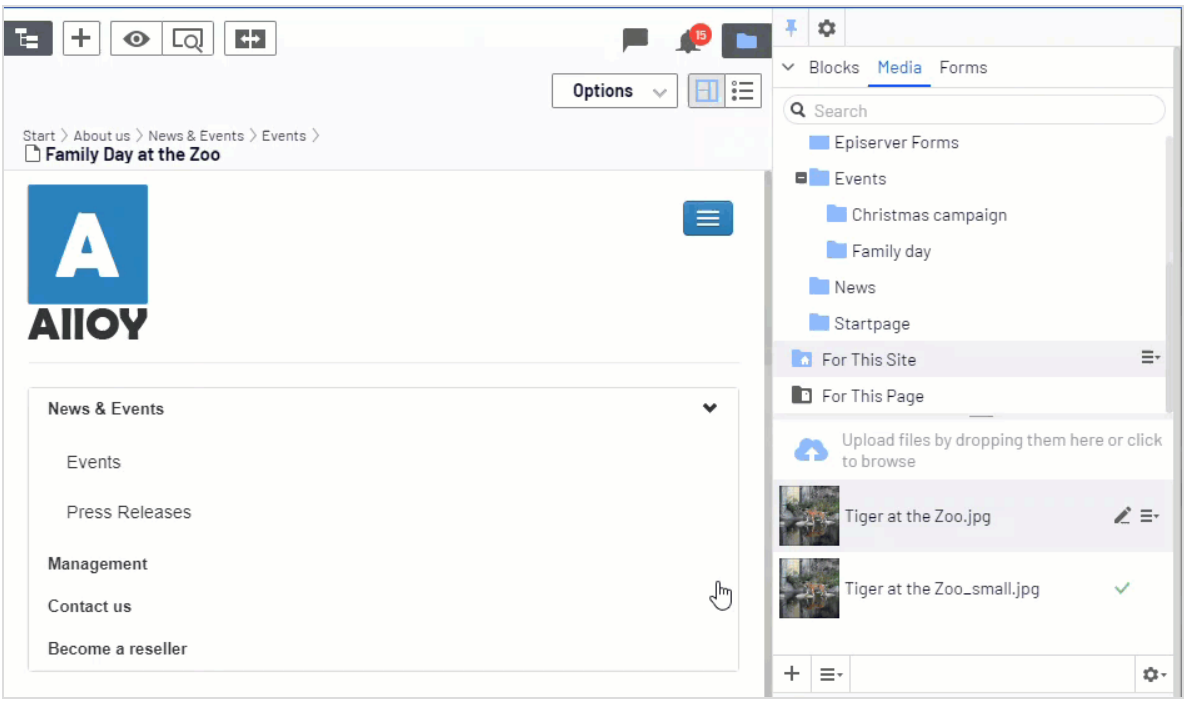

If you have Episerver Commerce or Episerver Forms installed, the assets pane also displays the Catalogs and Forms gadgets per default.

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.

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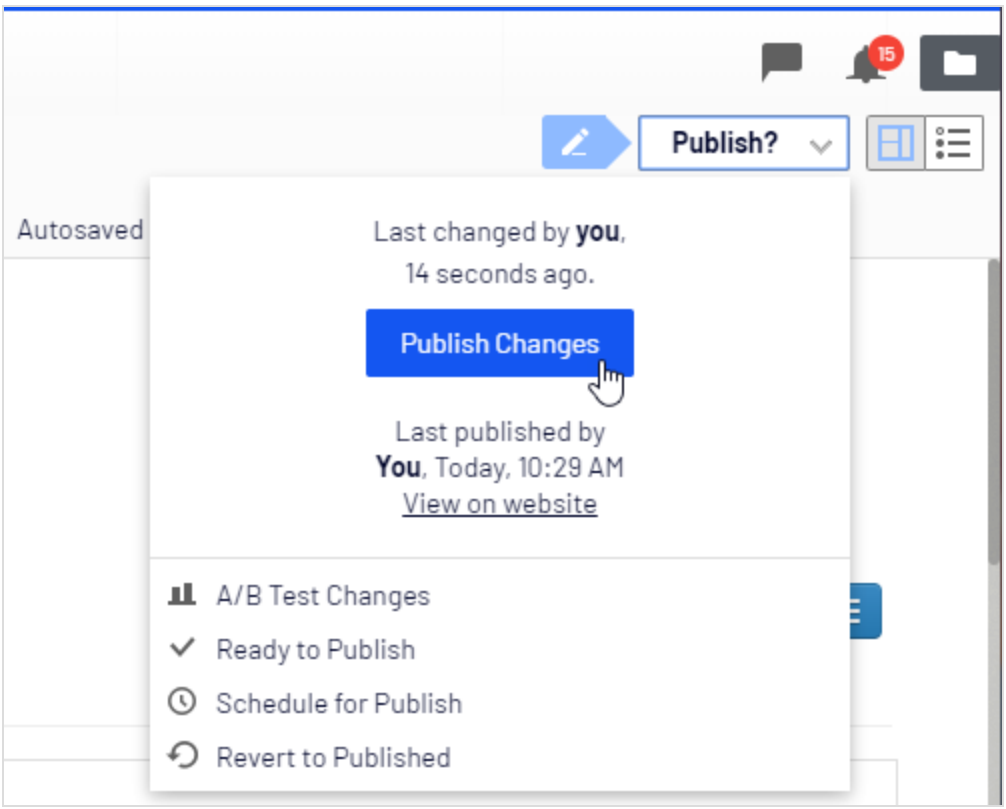

When working with content such as pages and blocks in CMS, or catalog content in Commerce, there are two editing views, **On-Page Editing** and **All Properties**, with buttons to switch between them.

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).

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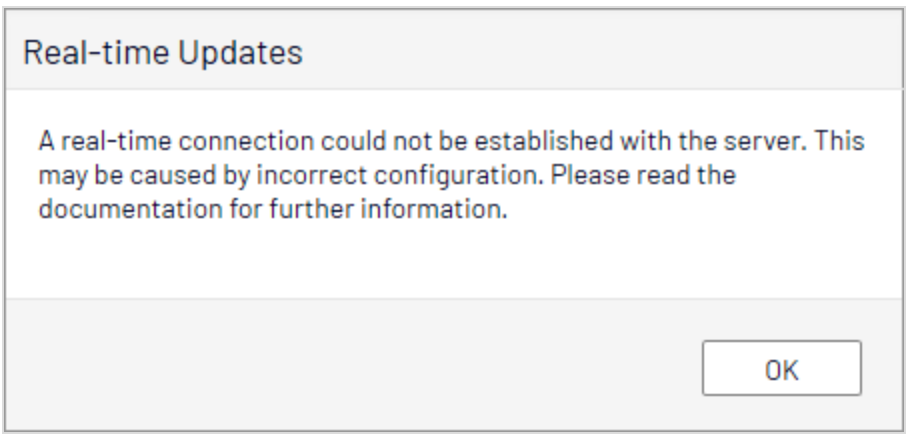
Real-time Updates

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



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

Network problems

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

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

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

WebSocket support

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

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

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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 Episerver and with projects and comments but you need to manually refresh the user interface with the **Refresh** button to see new comments or items.

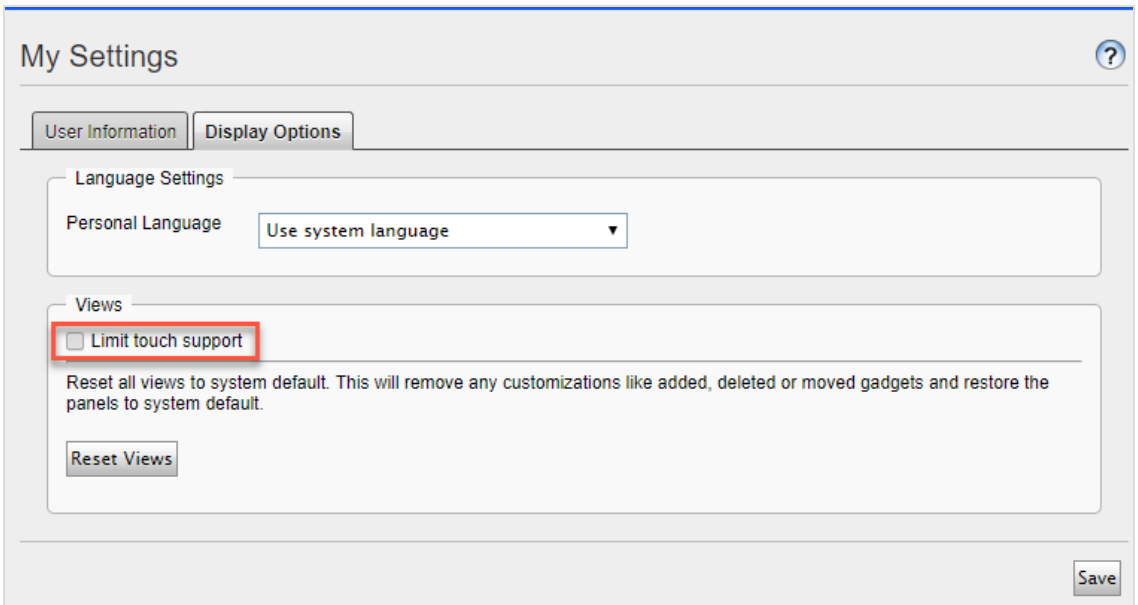
Depending on the system configuration when the WebSocket protocol is disabled, you may or may not see the *Real-time Updates* dialog box.

My settings

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

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

- **Personal language**. Select your desired user interface language from the drop-down. This 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 mouse, which may cause problems such as making it impossible to resize panes using the mouse. If you experience problems with Episerver and the touch screen, enable the **Limit touch support** feature. This feature prioritizes mouse input over touch screen input and enables the mouse for interactions such as drag and drop, resizing of panes, and so on.



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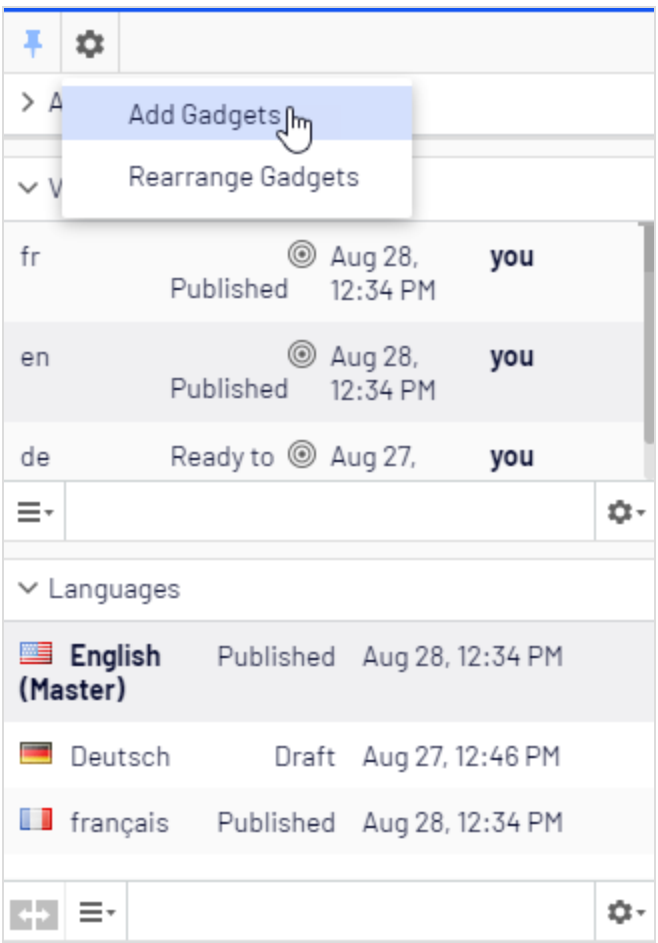
- **Reset all views to system default**. You can reset your user interface views to the settings. If you have changes to the user interfaces, such as added, moved or deleted gadgets, these changes are undone and the default views are displayed.

Add-ons

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

When they 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.



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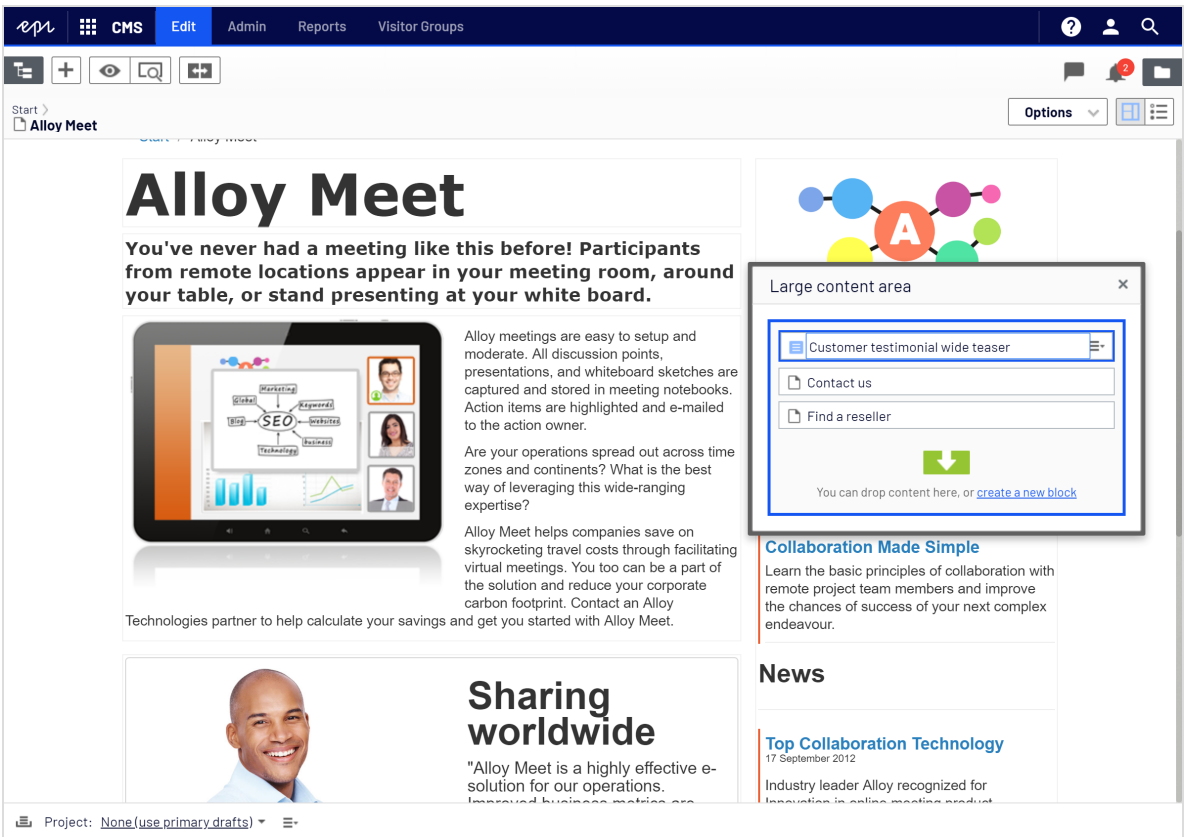
Working in On-page editing view

On-page editing is what you see when accessing the edit view in Episerver. From here you can instantly start editing content; the areas that are available for editing are highlighted. The available areas depend on how the page type 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.



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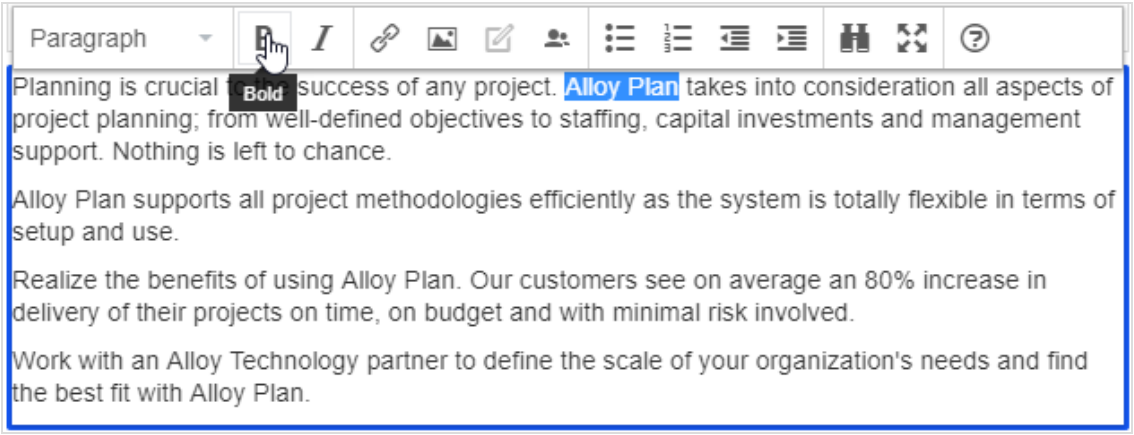
Example: Editing a page through on-page edit

This example describes how to edit a page, but the procedure is similar when editing blocks or catalog content if you have 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 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.

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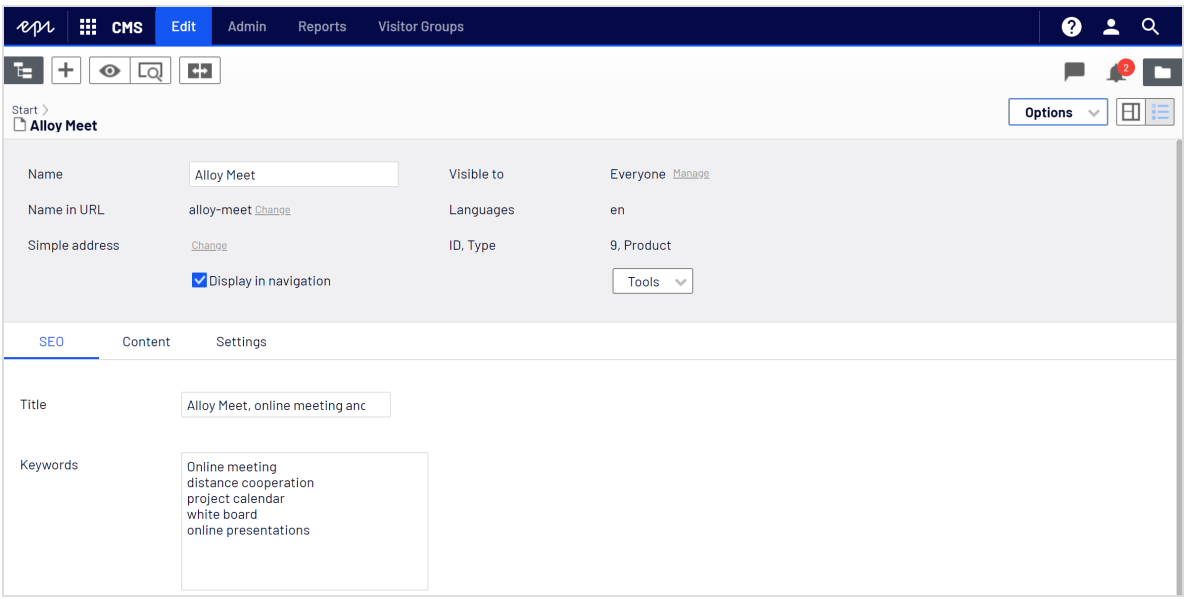
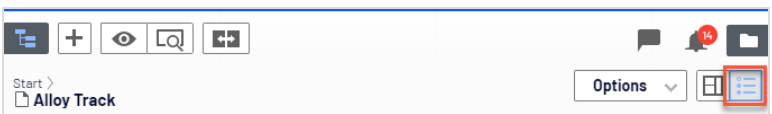


Not all properties are available in the on-page editing view; to see all properties, switch to the All Properties editing view.

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.



> **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 Episerver sample templates.

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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	The page URL[2] 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. **Warning:** Changing the URL for an existing page may cause broken links.
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, *products* as a simple address lets you find the page just by entering the URL (for example, *https://www.company.com/products*) 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 struc-

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

[2] Stands for "Uniform Resource Locator". Also known as a web address such as http://world.episerver.com.

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Property	Description
	tures 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: • **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 Episerver Commerce installed.

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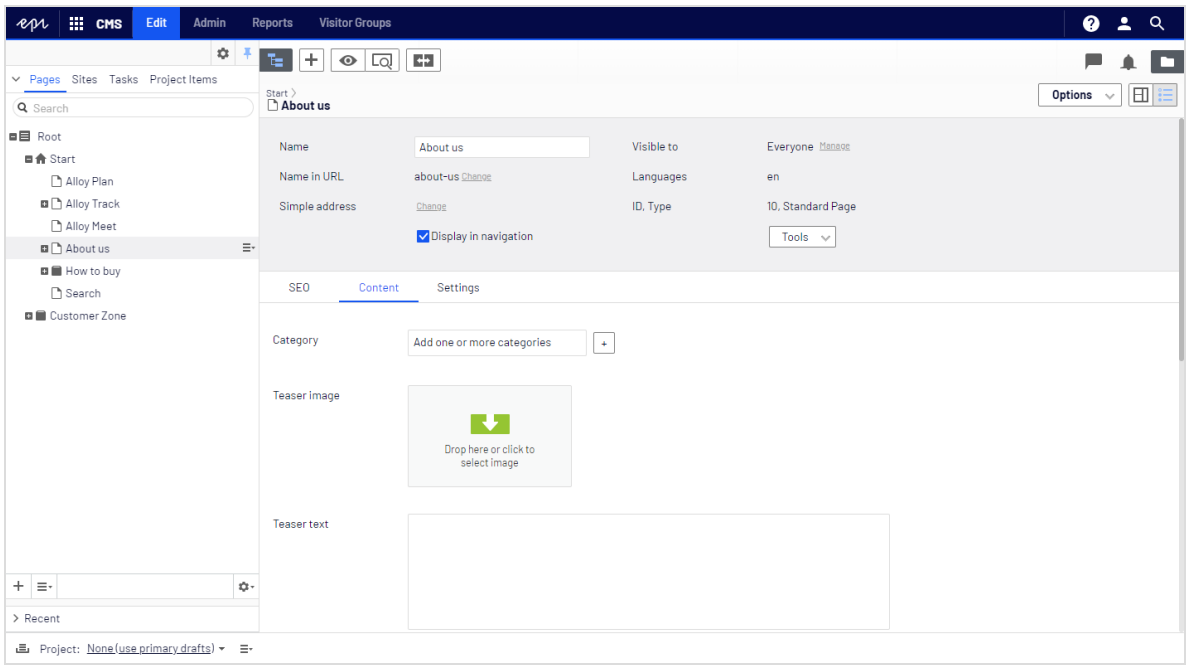

Property	Description
Category	Categorization of content is useful in filtering functionality for search, navigation and listings. You create a category in the administrative interface before you can apply it to content in edit view. **Note:** A category is a built-in property in Episerver CMS. You can apply a category to content, but your website also needs customized functionality to display the resulting outcome, such as in a filtering. Also, do not confuse content categories with Commerce categories; see Creating a catalog entry.
Main body	Example of a rich-text editor property, for adding editorial content such as text, images and links. See Using the rich-text editor.

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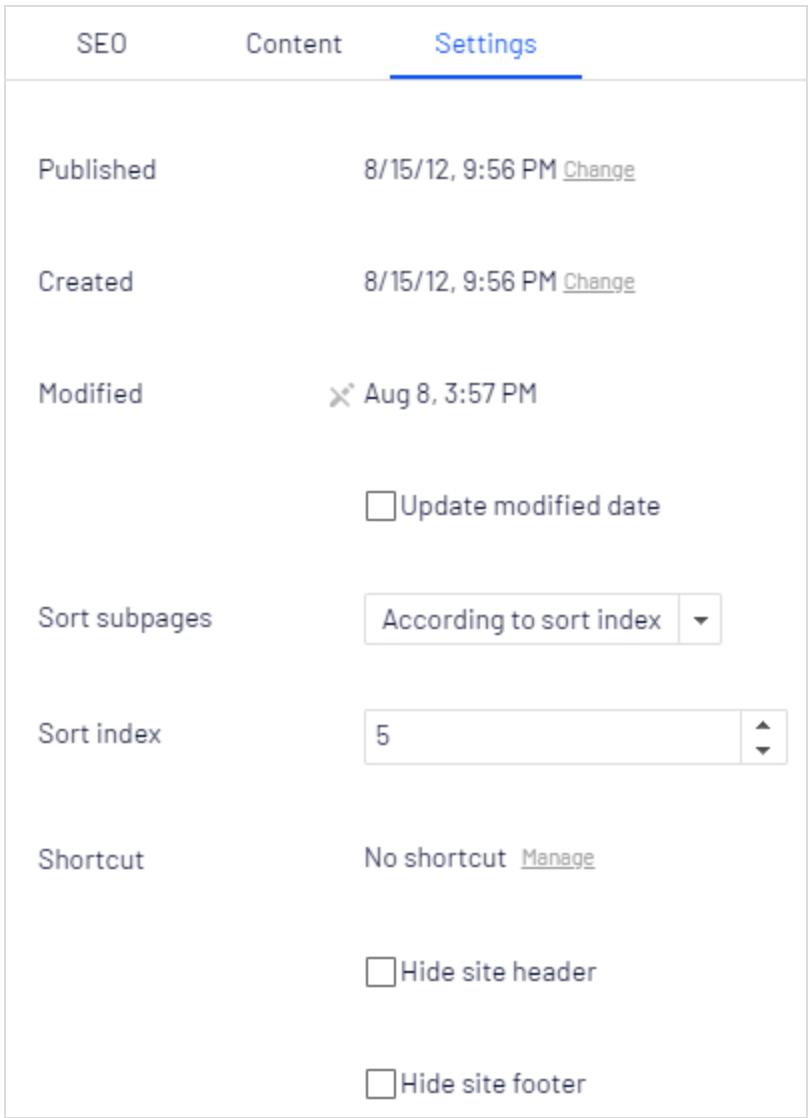
Settings tab

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



Property	Description
Published, **Created** and **Modified**	System-generated timestamps for the content that rarely need to be changed.

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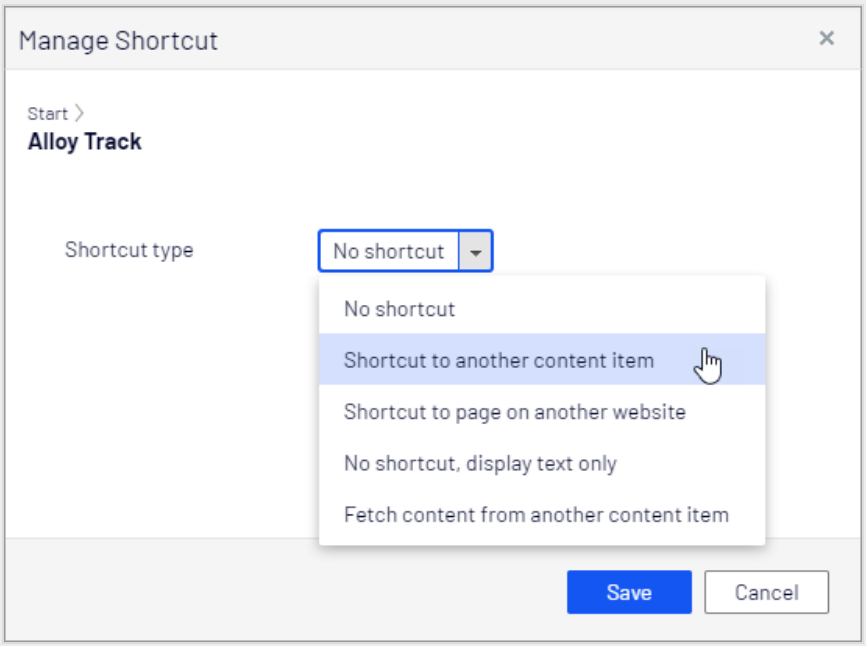
Property	Description
Update modified date	Select this check box if you have made significant changes to the content and want the system to update the modification date and include the content once more, such as in a subscription send-out.
Sort subpages and **sort index**	Defines the sort order for pages in the page tree structure and navigation menus. See Structuring the website.
Shortcut	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.  The following shortcut types are available: • **No shortcut**. Creates a link that displays the content you have created. By selecting this, you can also reset the page after using other types of links. • **Shortcut to 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 *https://*. • **No shortcut, display text only**. Creates a heading with no link in the menu,

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Property	Description
	without displaying any information or link to another page. • **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. **Note:** When you select **Fetch content from another content item**, you don't 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.

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

Commerce-related content

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

Assets

Assets can be content of the type media files, images, documents, blocks or products from the catalogs in Episerver Commerce. Assets are available from the assets pane in both CMS and Commerce, making it easy to drag-and-drop items, such as images, blocks or products into 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 sections Folders, Media and Blocks.

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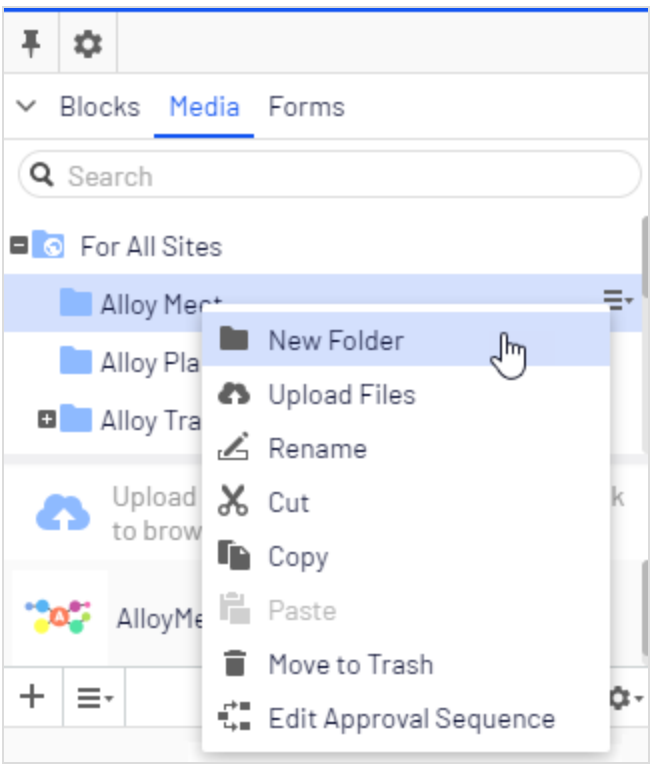
> **Note:** By default, the assets pane in a standard Episerver installation will contain **Blocks** and **Media** with the addition of **Catalog entries** for Episerver Commerce. Since the assets pane is a plug-in area, there might be other asset types available in your installation.

Folders

Folders in the assets pane in Episerver 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, or you can have folders with content that will only be available for a specific website, or a page or block.



> **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:

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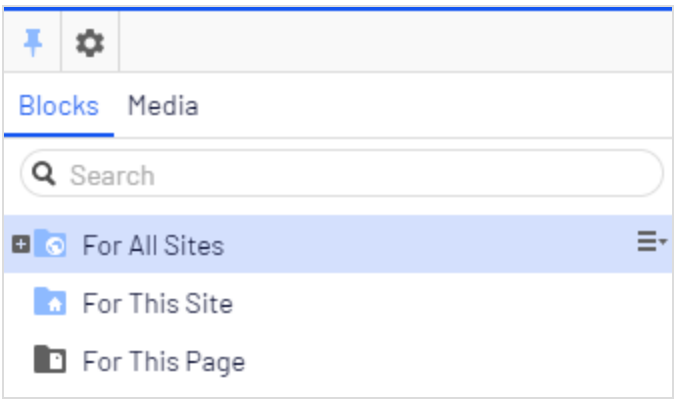
- **For All Sites**. This is called a global folder. Its content is available to all pages and blocks for all websites in a multi-site installation.
- **For This Site**. This is called a site-specific folder. Its content is available only on the current website (regardless of it is a single or multi-site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



> **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 Episerver Commerce.

Creating, renaming and moving folders

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

> **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.

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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 Episerver, in the same way as for pages in the page tree structure.

Managing folders in multiple languages

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

Media

Media in Episerver 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 Episerver 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 section for more information on how to organize your files in folders.

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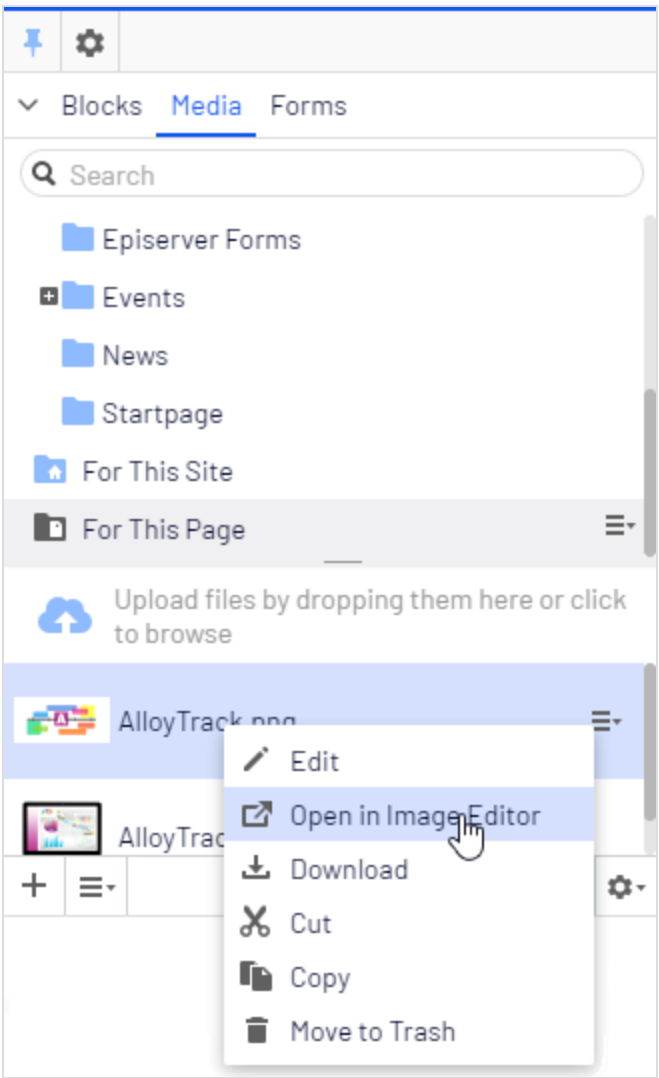

Searching for media

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

Uploading media

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

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context menu for the target folder to which you want to upload files.

Publishing media

If your system has not been 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 by 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 Episerver, but other rendering formats can be developed.

Downloading media

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

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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:** 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 Episerver CMS, where you can create new blocks and organize them in folders. You can then utilize blocks by dragging them into the content area[1] of Episerver CMS pages. You can manage block versions like other types of content, and blocks can also be personalized to be displayed for selected visitor group[2].

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[1] Where you can drag-and-drop pages and blocks, and create a block. (A link collection has a similar area for creating links.)
[2] Site visitors with something in common, such as age, geographic location, and so on. Used in the personalization feature of Episerver CMS. (See Personalizing Content.)

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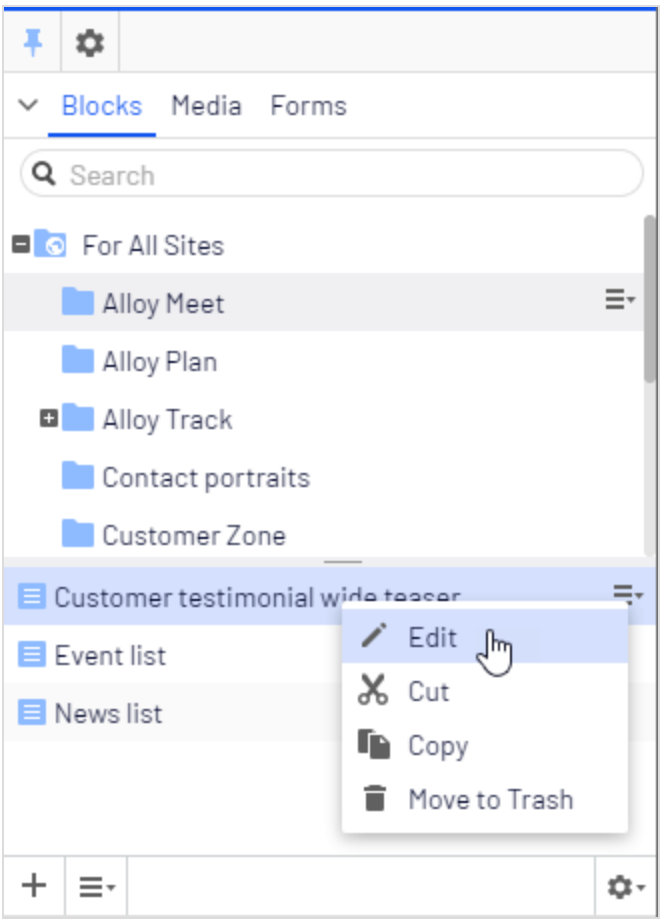

Use the search field at the top of the pane to enter search criteria and retrieve blocks. Clicking a search result will expand the folder where the block is located. To browse for blocks, click a folder to expand the folders and content beneath it.

Creating a block

> **Note:** To create blocks, editors must have **Create** access rights on the **root** directory of the website.

Creating a block from the Blocks tab in the assets pane

When using this option, the block is saved in the block folder structure, and it is available for other pages on the website.

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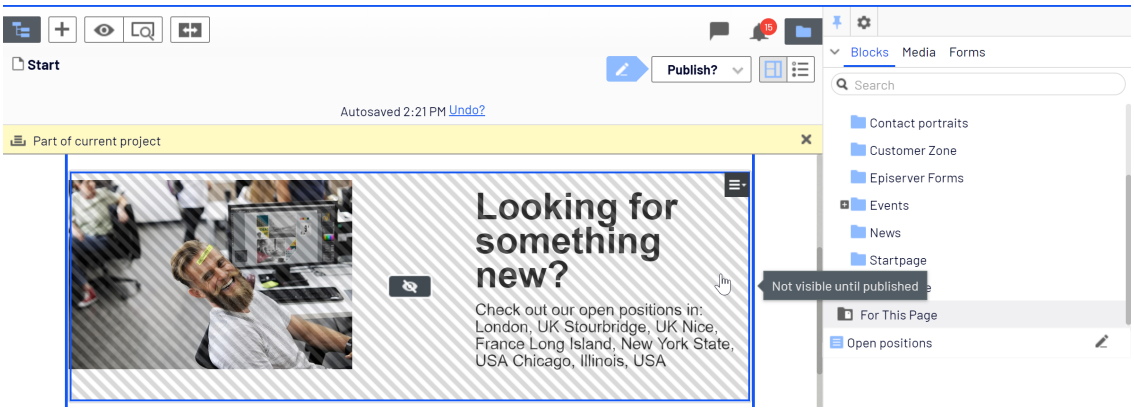
1. Select the folder in the structure under which you want create a block, and select **New Block** in the context menu, or click the **Add** button.
2. Select the block type among those that are available, and provide a name for the block.
3. Depending on the type of block, add content as appropriate.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



Creating a block directly from a content area

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

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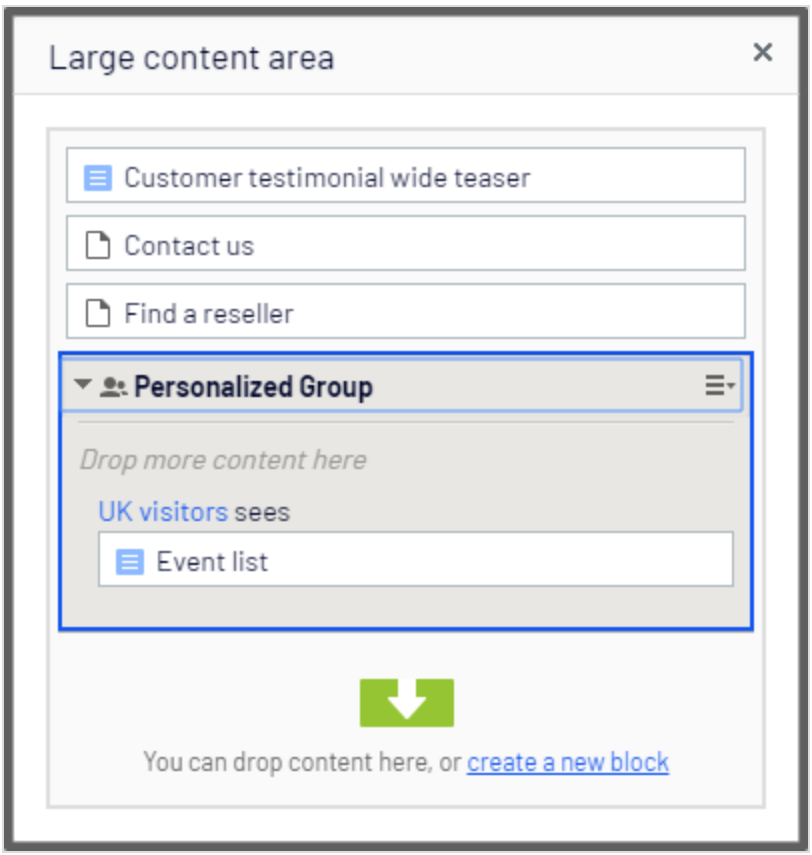
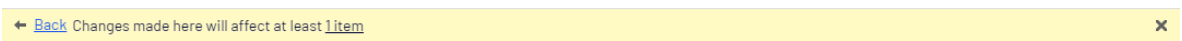


1. Click **Create a new block** in the content area, from the **On-page** or the **All properties** editing view.
2. Select the block type among those that are available, and then name the block.
3. Depending on the type of block, add content as appropriate.
4. Publish the block immediately or schedule for later publishing.

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



Finding the block location

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.

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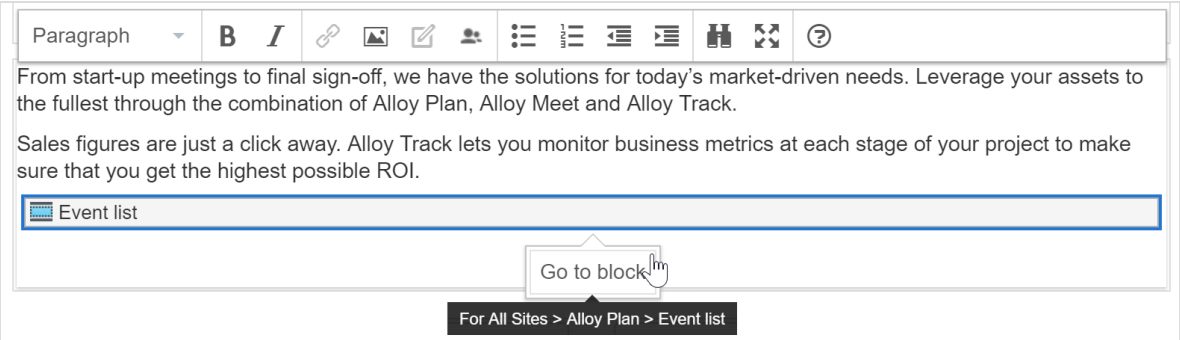

Editing a block

> **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, and select **Edit** in the context menu.
2. Depending on the type of block, change the content as appropriate.

   If you want to rename the block, use the All Properties editing view.
3. Publish the block immediately or schedule for the changes to be published later.

Using blocks in content

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

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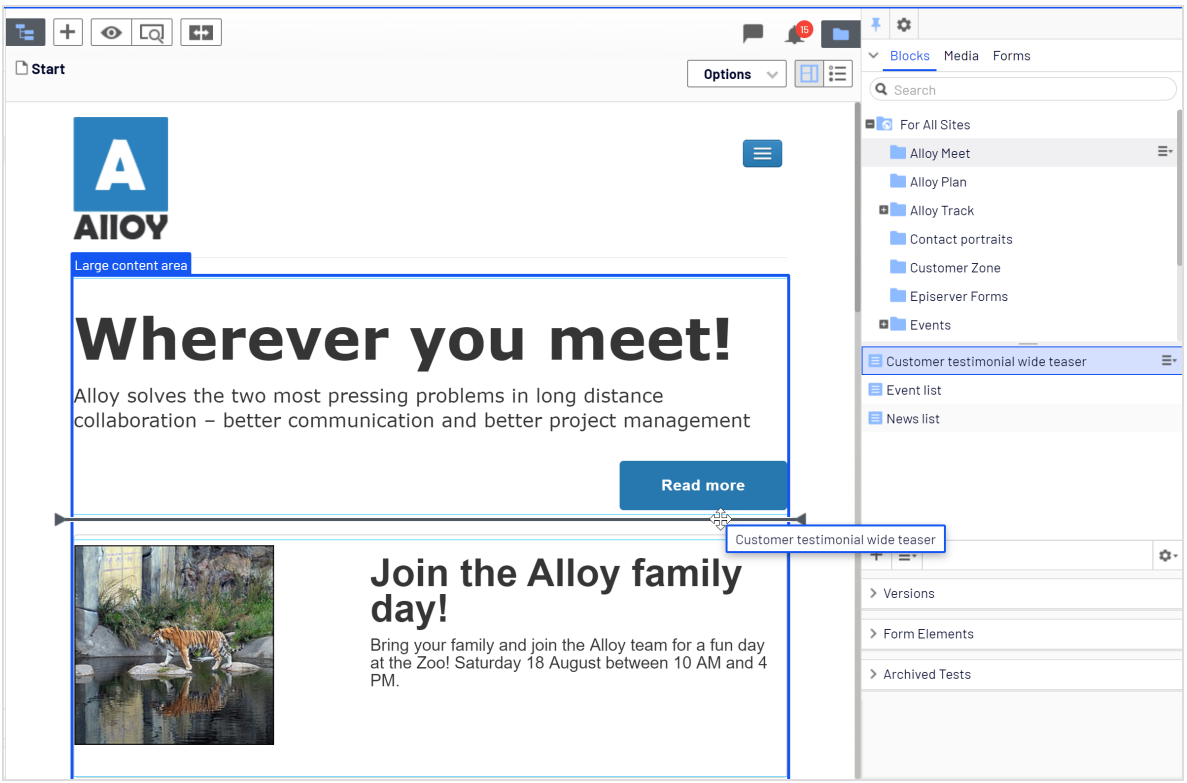

You can add several blocks to the same area. Drag the block above or beneath an existing block, and drop it when the separator appears. The blocks can be rearranged later. It is also possible to add blocks to a content area from the All Properties editing view.

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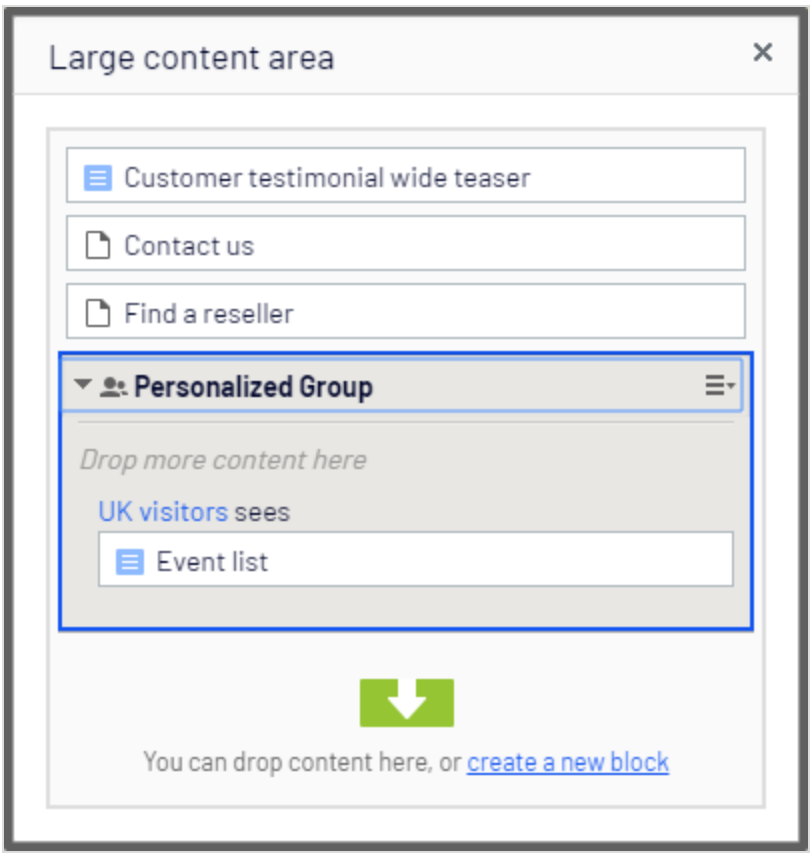

> **Note:** Like blocks, **pages** from the page tree can also be dropped into a content area. Depending on how the page template is built, the content of the selected page is rendered in the content area.

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

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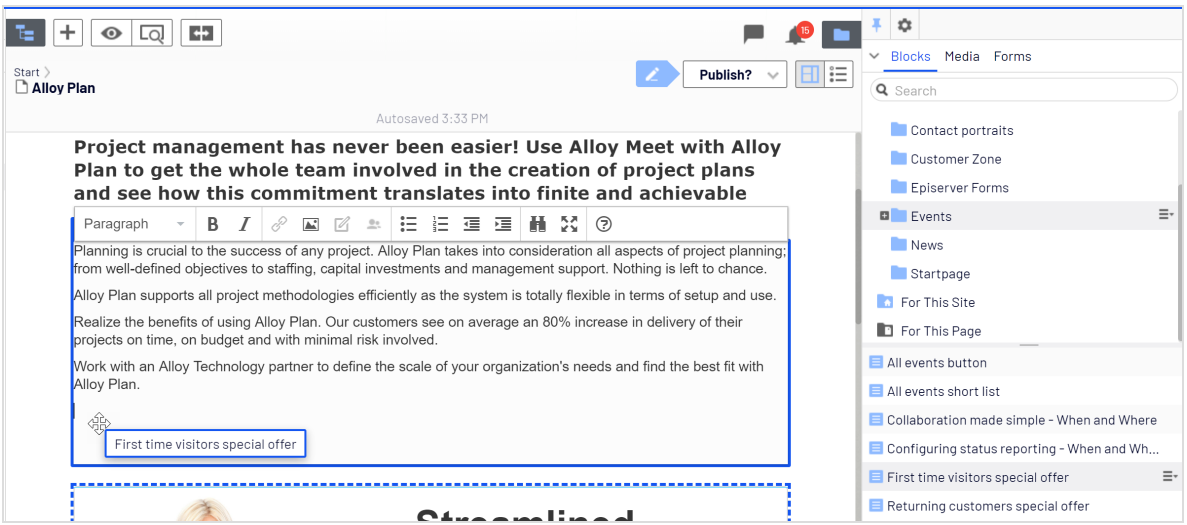


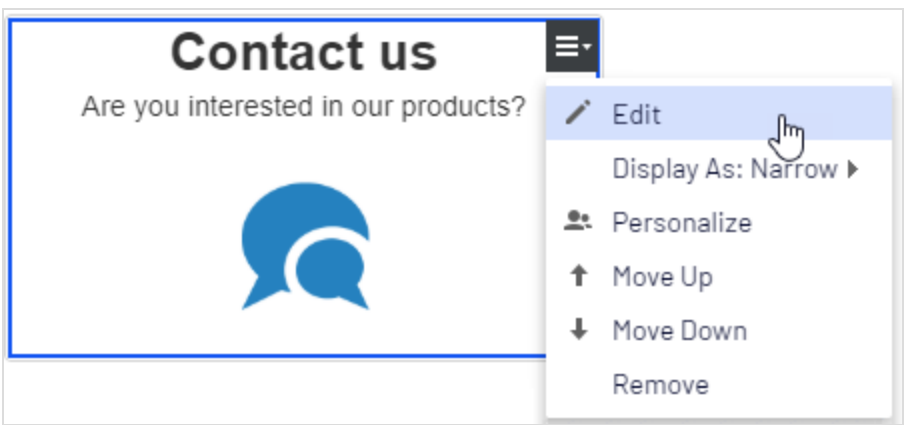
To **remove** a block from a content area, select **Remove** from the context menu.

> **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.



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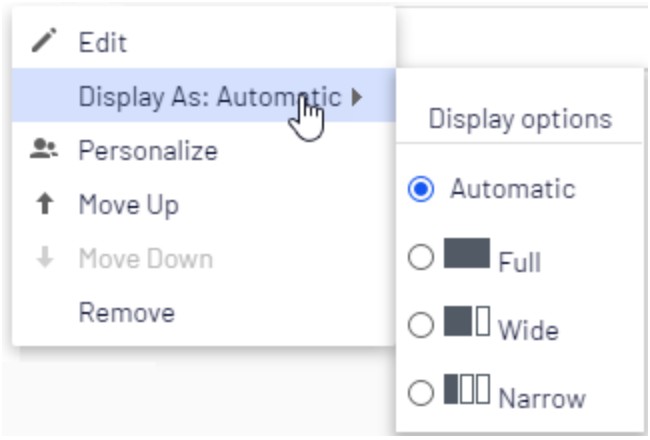
Displaying blocks in different styles

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.

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- **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 Episerver User Guide.

Finding content

Follow these tips to find Episerver 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, navigate to the content on the website.
Content is associated with a project	Use the projects gadget or, if you are using the projects feature, the project overview or the project items navigation pane.
Text within content title or body	Use the global search in the global menu[2] or the search fields at the top of the navigation and assets panes. • The global search can search all types of content on the website (depending on the configured search provider). • Search fields in navigation and assets panes search for content in respective pane and related dialogs.

[1] A 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.)
[2] Group of options that appears in the uppermost part of the user interface when logged in. The global menu displays products and systems integrated with your website. It also displays links to the user guide and user settings, and to a global search. See the User interface topic for further information.

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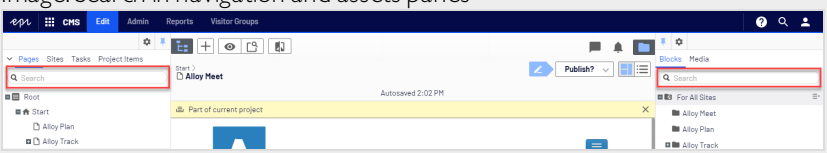
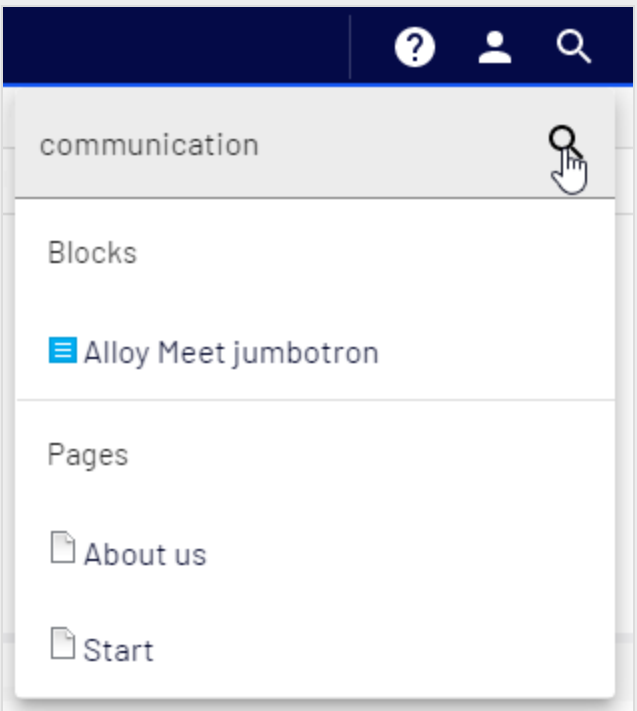
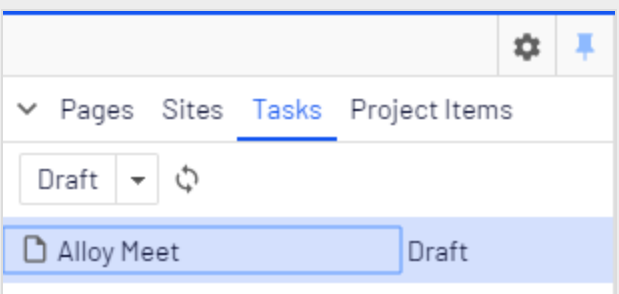
What you know	Action
	See Search. Image: Search in navigation and assets panes  Image: Global search 
A page's status (for example, draft)	Use the **Tasks** tab to find all content in that status. 

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What you know	Action
Content was edited recently	Use the *Recently changed* status in the **Tasks** tab or the **Recent** gadget. See also: Managing gadgets.

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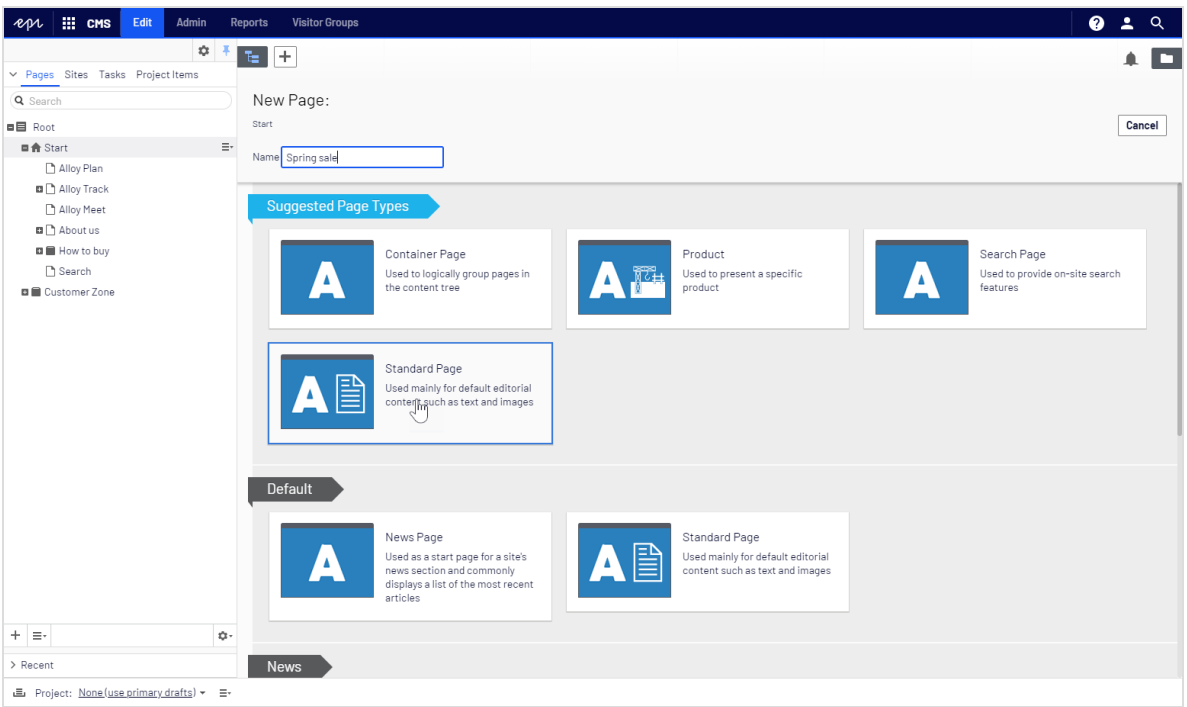
Creating content

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

Creating a page

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

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



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Creating a block

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

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

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

> **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.

Commerce-related content

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

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

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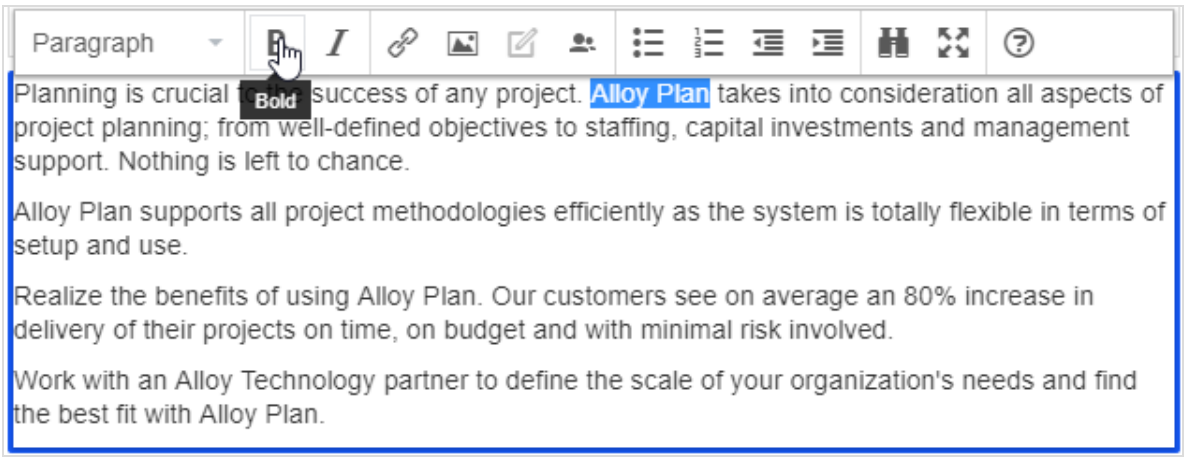

The TinyMCE editor is highly configurable, and a developer may have configured it so that it looks different on different page types on your website. There are also a number of plug-ins that may have been added to your editor, but these are not described in this user guide. The Episerver sample templates 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 Episerver.

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.

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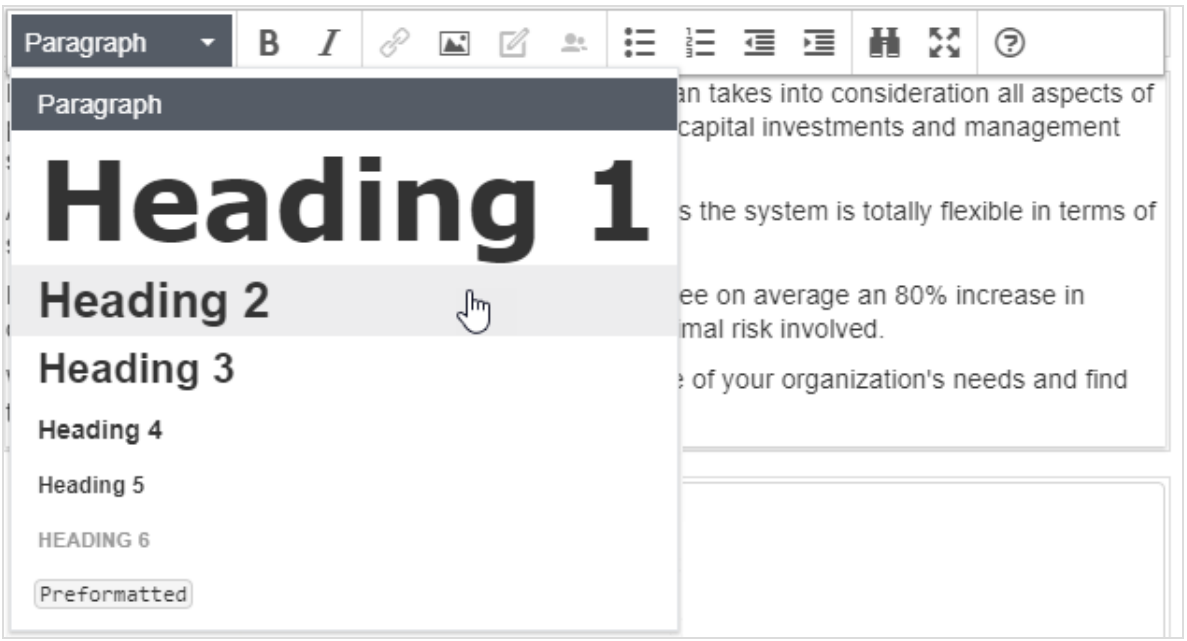

You can extend the styles list to include specific formatting for an introduction text, a predefined table layout, or to position images with floating text in the editor area.

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

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Command	Shortcut keys	
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	Control+o
Line break	Shift+Enter	Shift+Return
Focus to toolbar	Alt+F10	Alt+F10
Insert link	Ctrl+K	Command+K
Toogle fullscreen	Ctrl+Shift+F	Ctrl+Shift+F
Find and replace	Ctrl+F	Command+F

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

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Adding links

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

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

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

Creating a link

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

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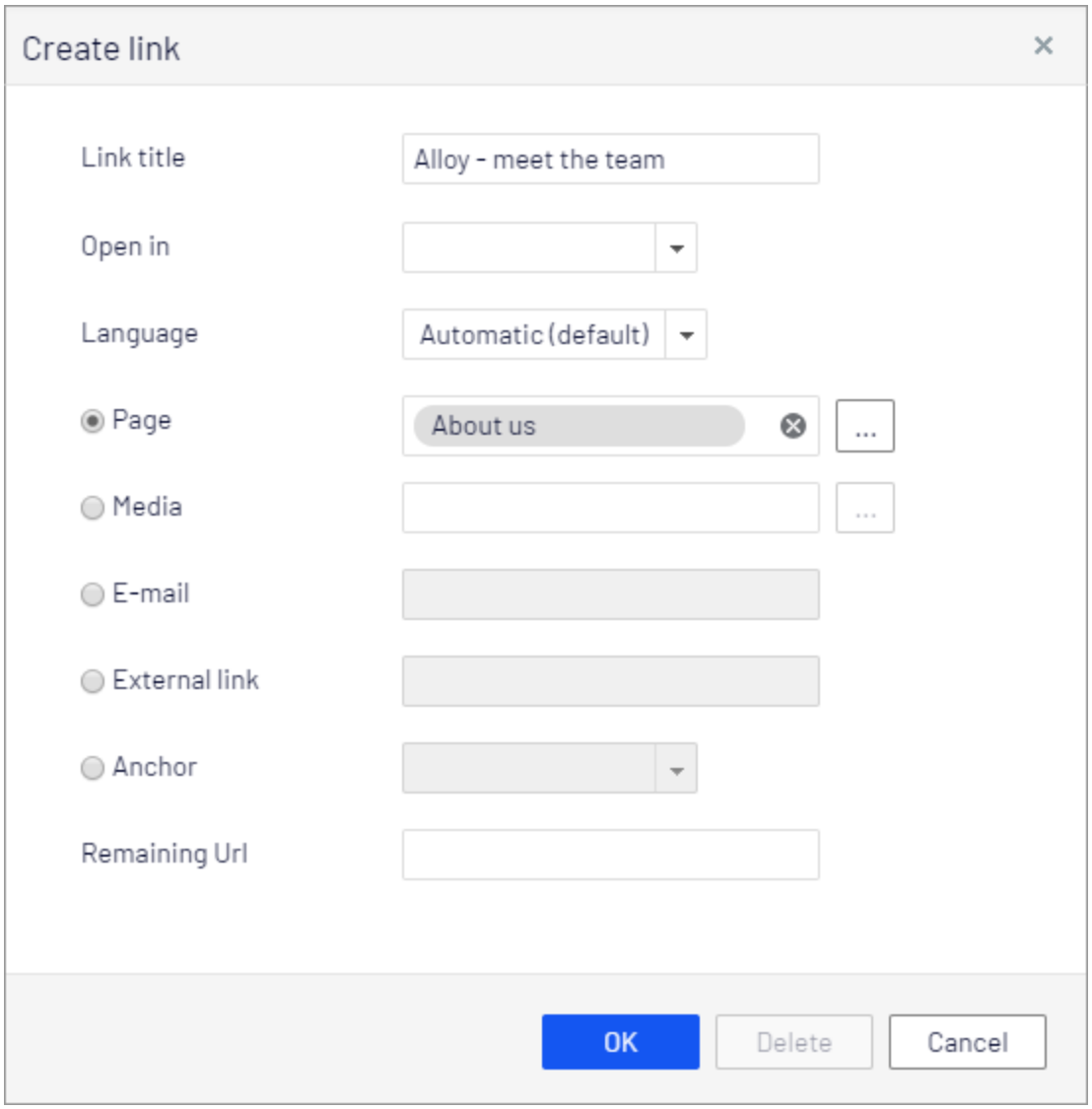

- **Link title** displays as descriptive text for the link, such as on mouse-over.
- **Open in** lets you display the link in a new window, often used for links to external sources.
- **Language** lets you link to a specific language version for content. **Automatic** directs visitors to the detected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

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Create link:	How to:	Detailed info, see:
	or From Create link dialog box, select **Page** or **External link**.	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, Episerver automatically converts the link to an internal link.

[1] Stands for "Uniform Resource Locator". Also known as a web address such as http://world.episerver.com.

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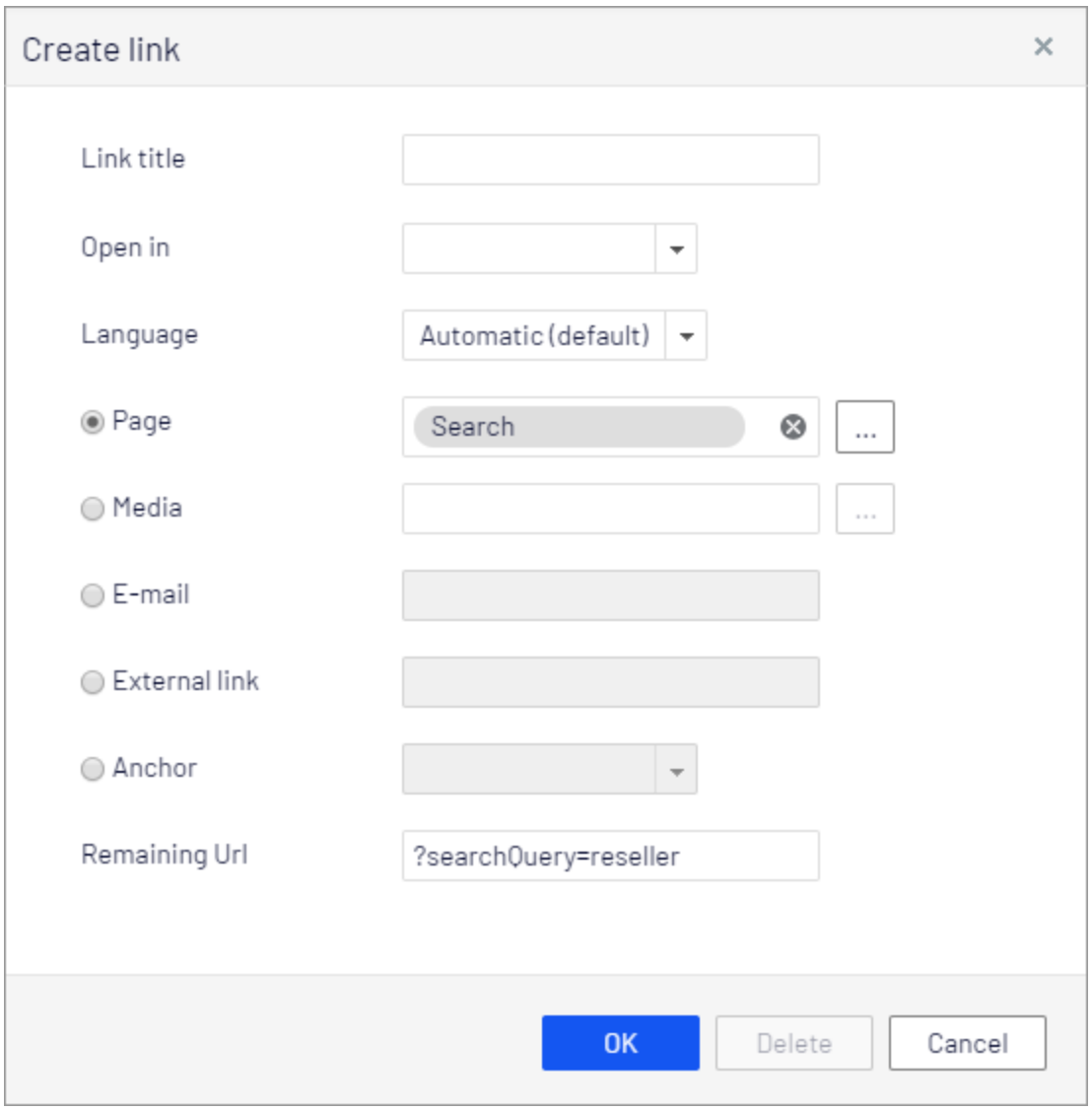
Remaining URL

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.al-loyexamplesite.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**.



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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, Episerver 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 web-site 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.

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Linking from an image

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

Creating anchor links

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

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

Link properties

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

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.

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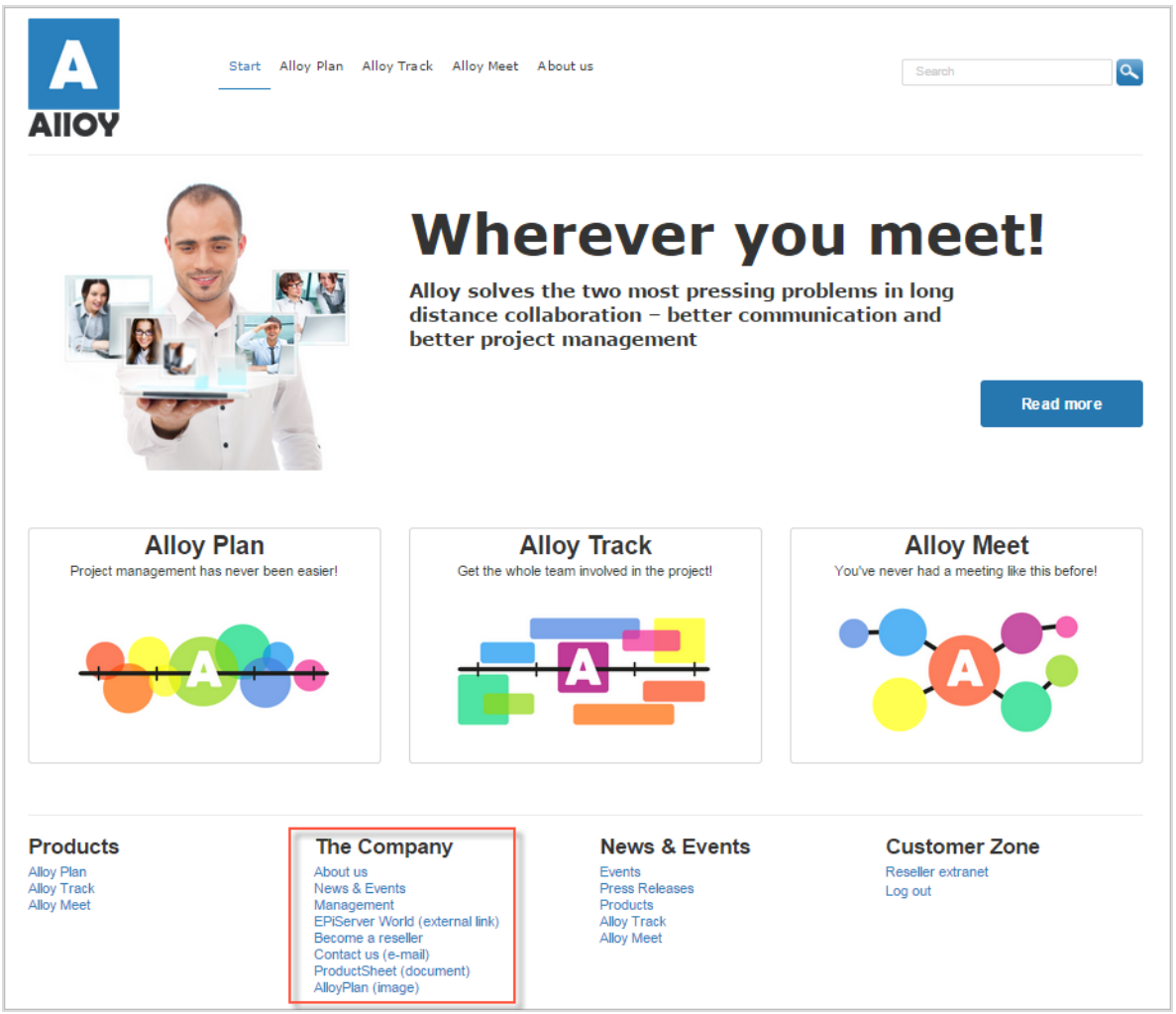

You can create links by dropping pages or media files in the link collection area, or by creating links through the link dialog. You can create links for pages, media files, external sources and email addresses. You can move links to change the order in which they appear.

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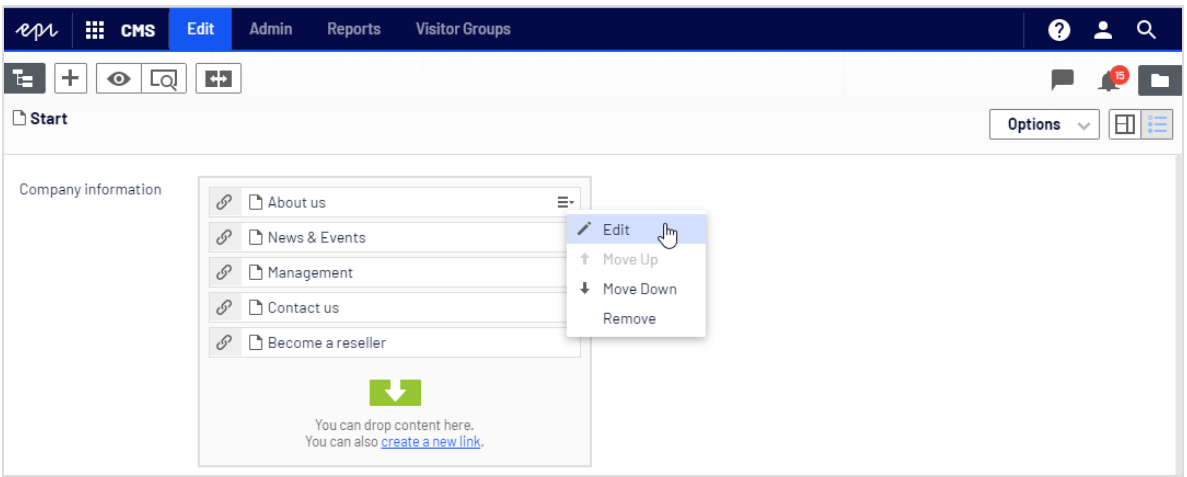

You can also edit the displayed name of the link.

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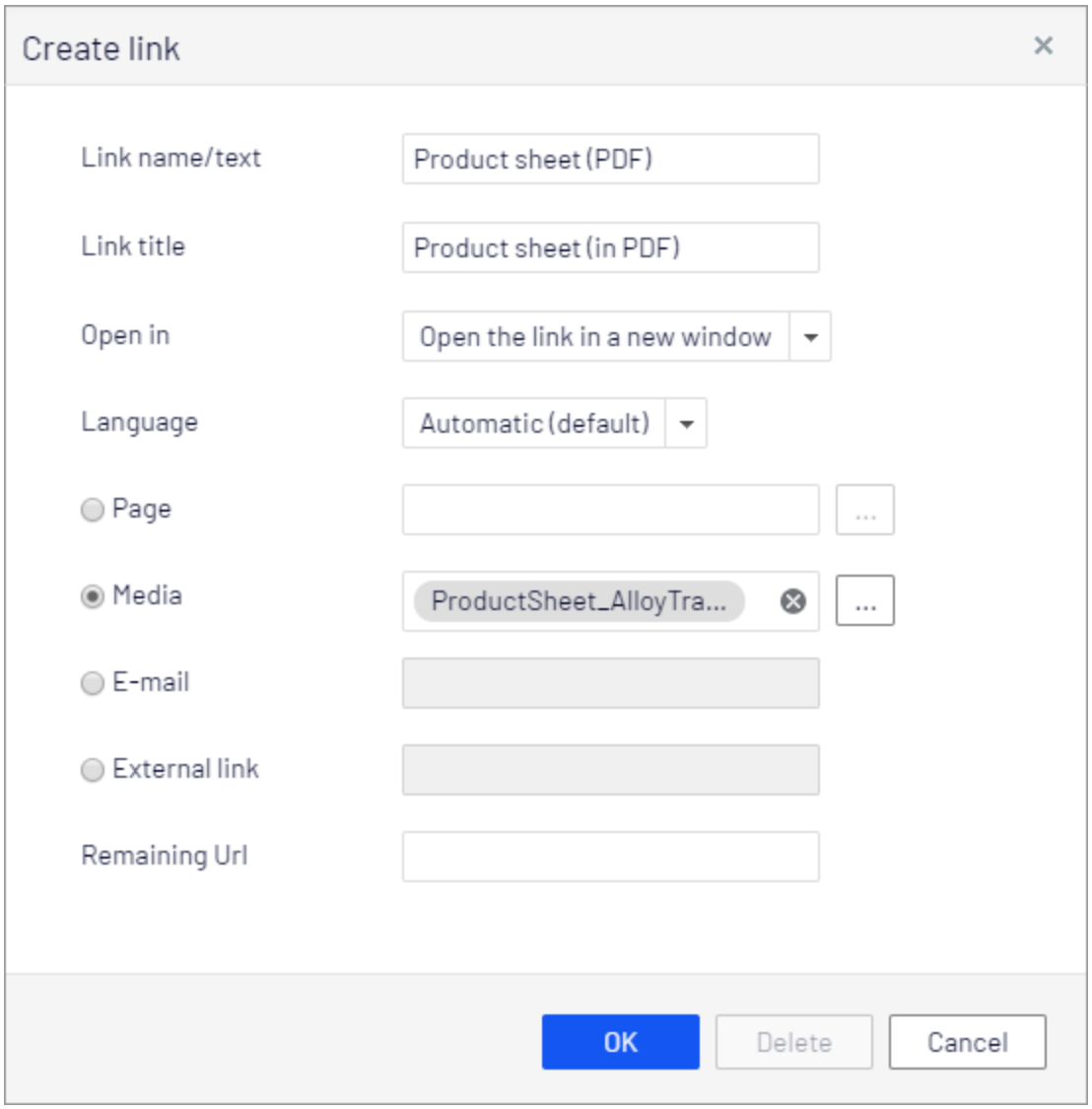

Linking to catalog entries

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

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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 Episerver 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 on 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.

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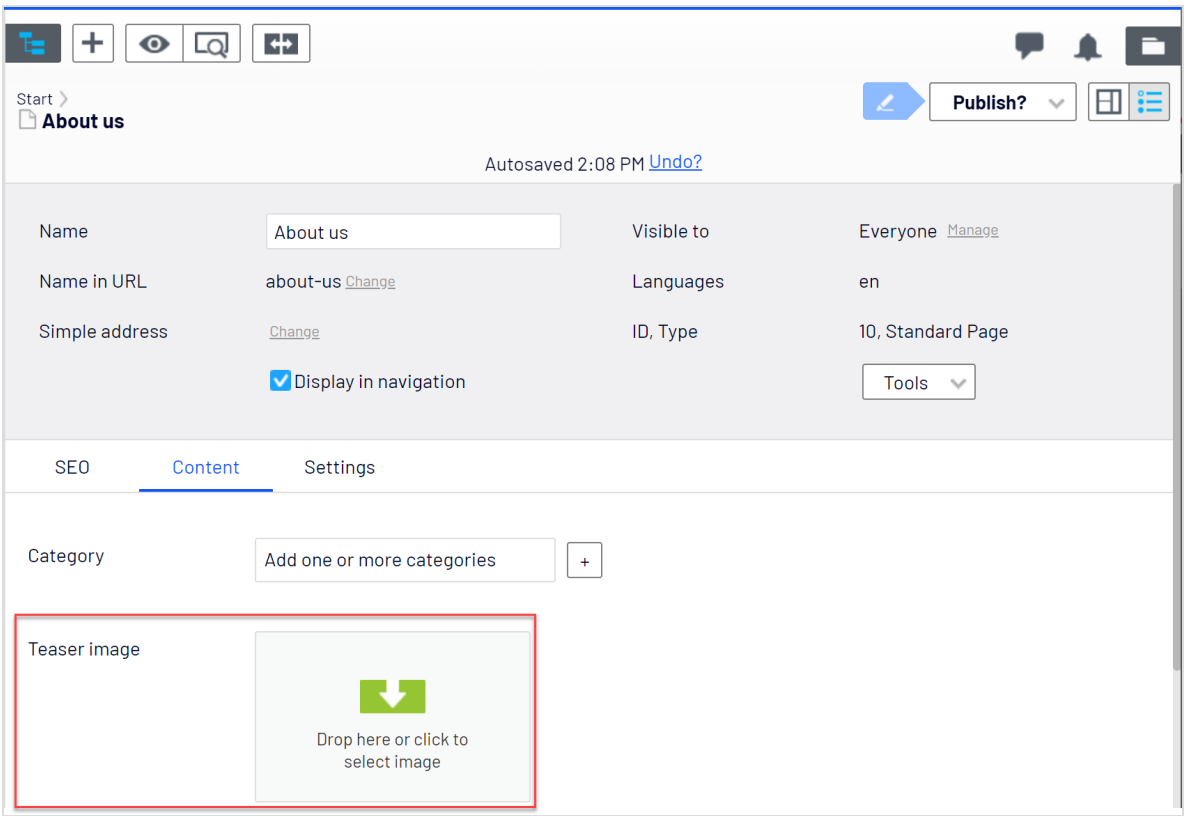

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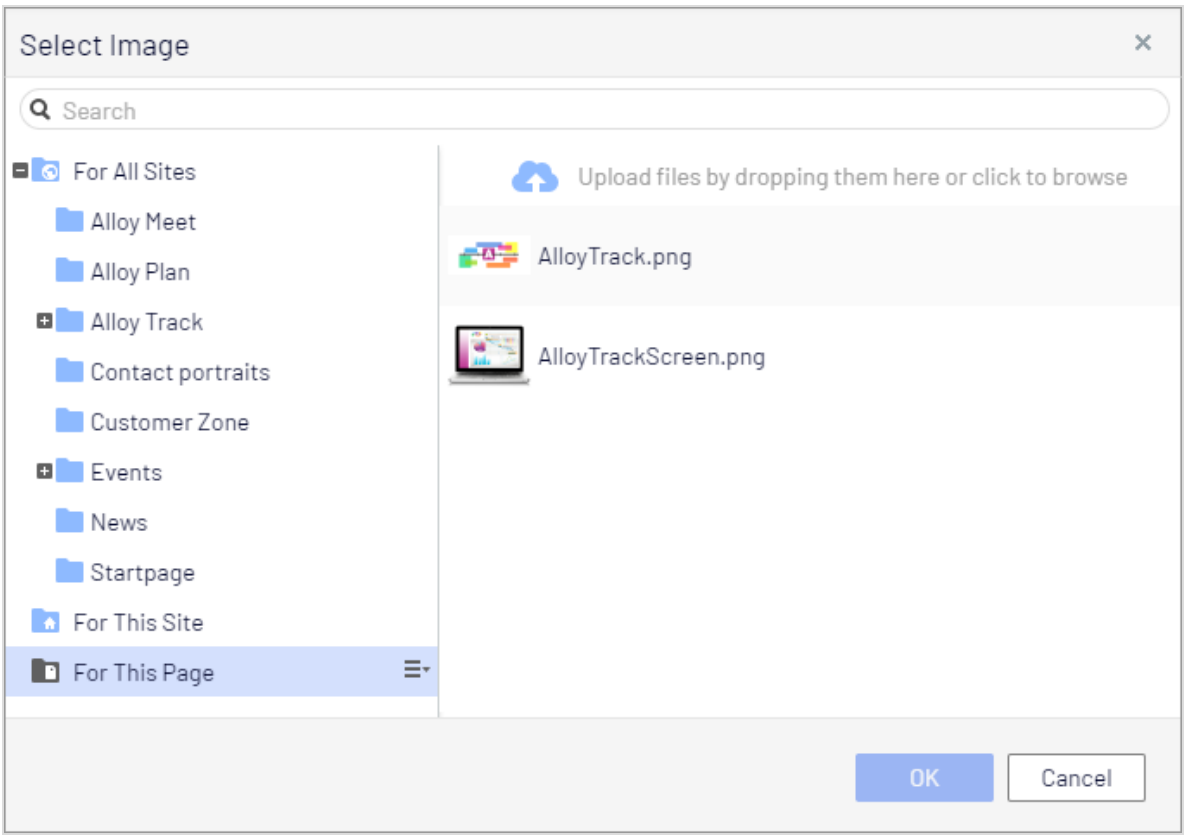

In rich-text editor or content areas

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 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. The image description is important when a reader has turned off the display of images in the browser or when a visually impaired user is using a screen reader.
5. Click **Ok**.

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

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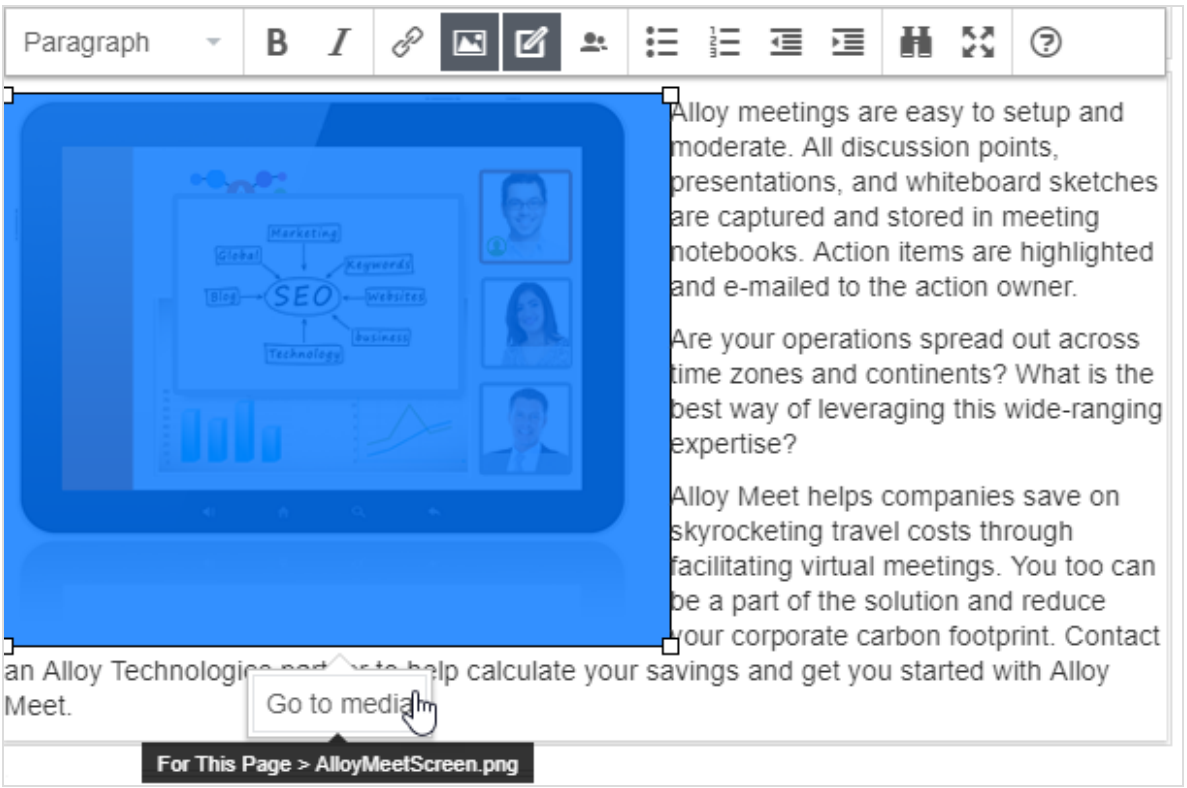
Finding the image location

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.



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:

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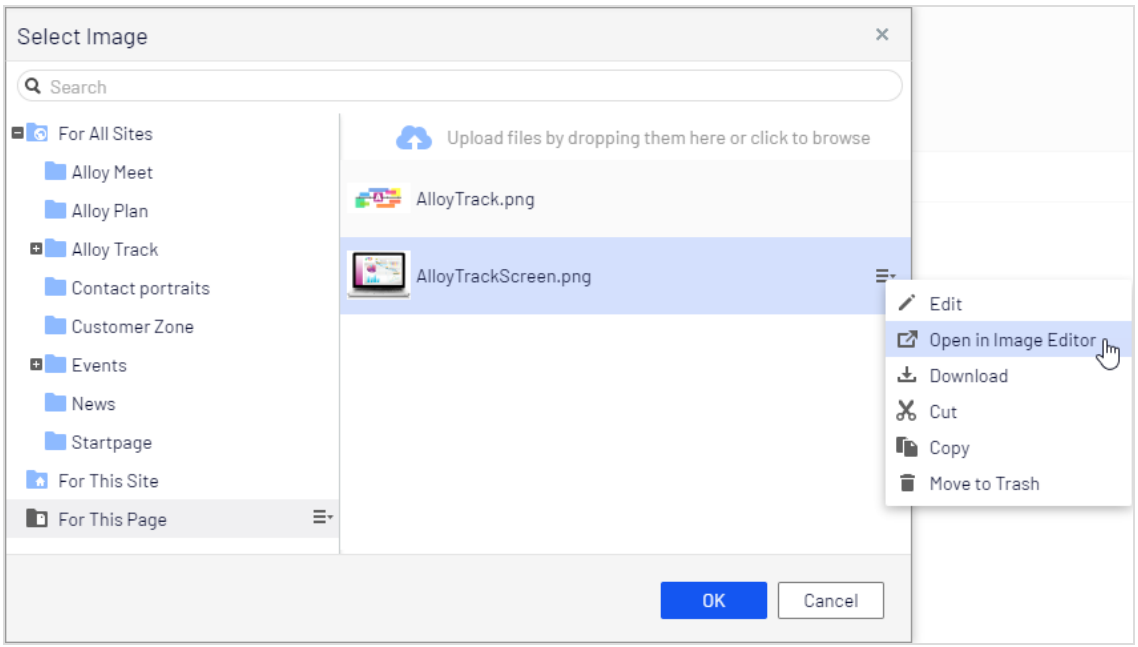
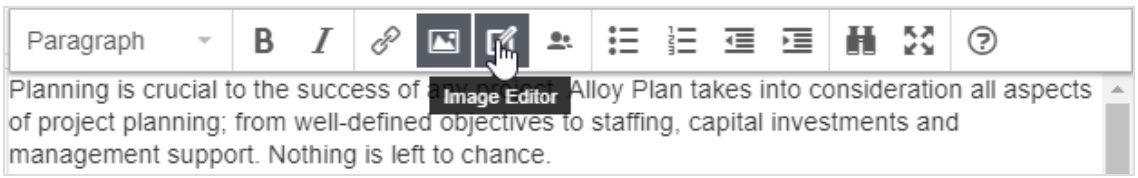


- In the rich-text editor, select the image and then click **Image Editor** in the toolbar.



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

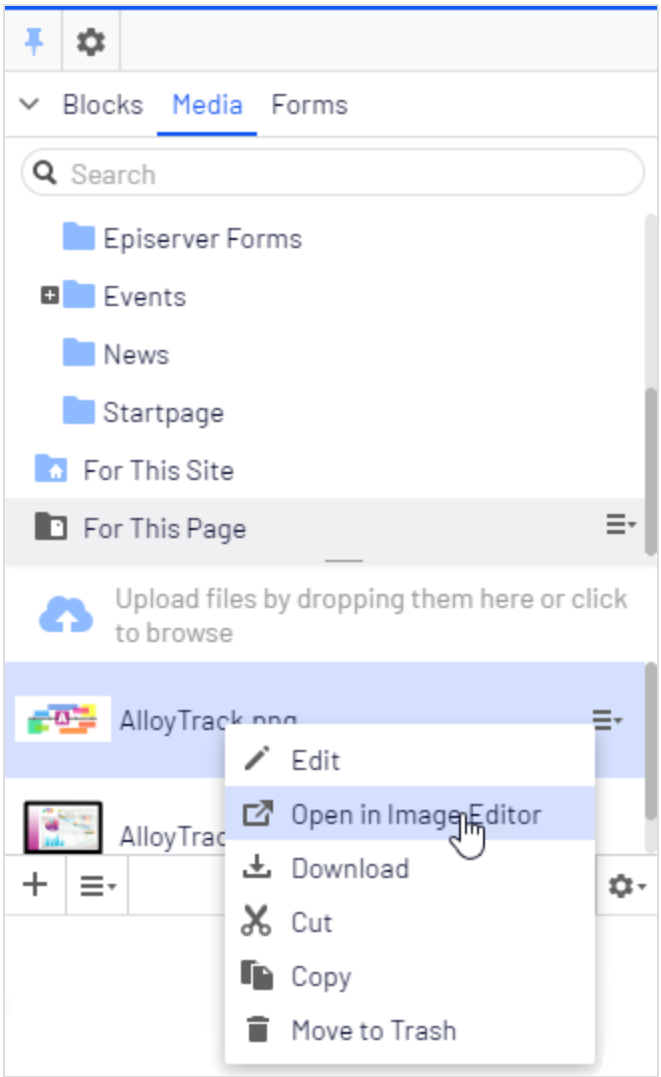

Image editing features include cropping, resizing and transforming:

Image editing	Description
Crop	Enter values for **Top**, **Left**, **Width** and **Height**, or draw a selection in the image to crop. **Note:** Remember to click **Apply** to save the changes before proceeding. You can apply **Preset** values if such values have been configured for the website.

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Image editing	Description
Resize	Enter values for **Width** and **Height**, or move a corner handle to resize, keep **Constrain proportions** selected to retain the image proportions. **Note:** Remember to click **Apply** to save the changes before proceeding. You can apply **Preset** values if such values have been configured for the website.
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**.

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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 Episerver 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 Episerver CMS version, using the legacy built-in form feature, see version 18-2 or earlier of the Episerver User Guide.

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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, Episerver 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.

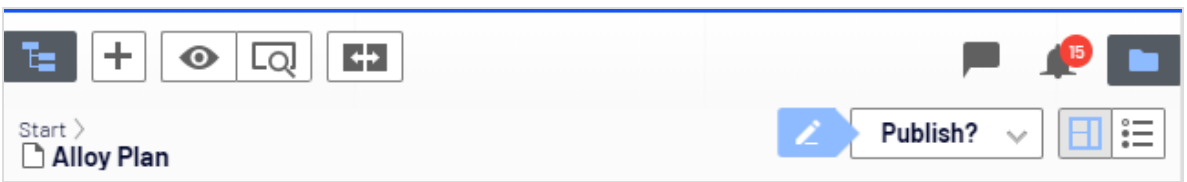
> **Note:** Comments are connected to a specific version of an item. If you delete an item version, all comments on that version are also deleted.

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 on 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:

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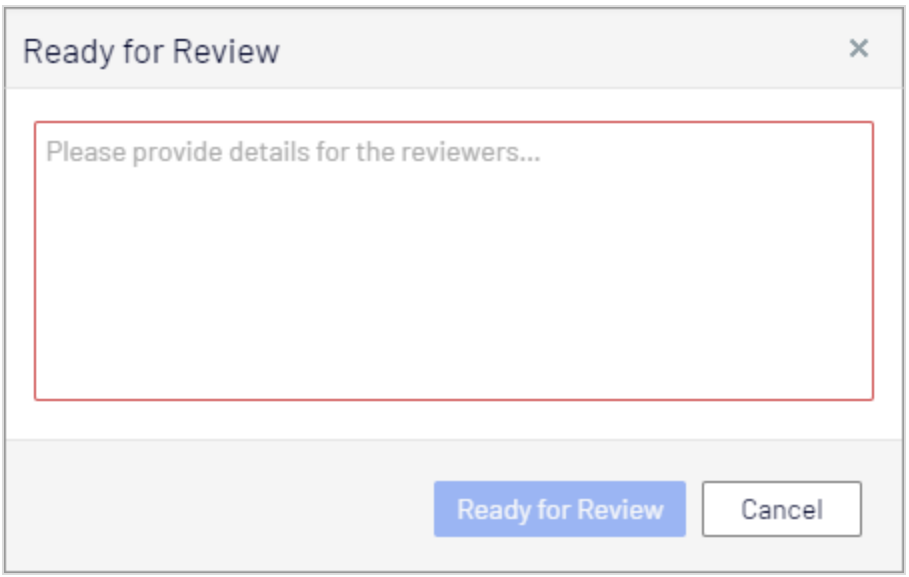
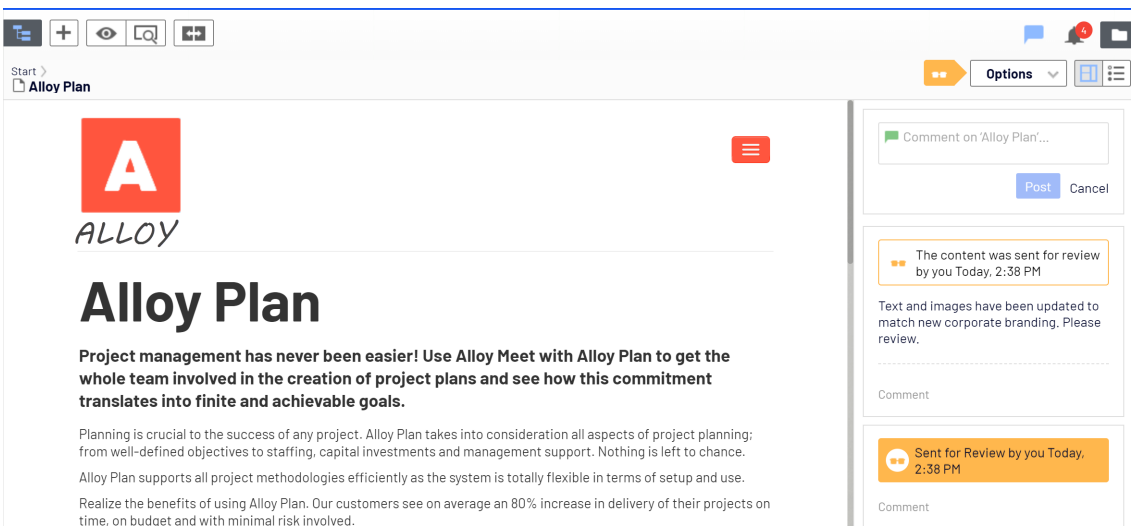


Adding a comment to a content item:

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

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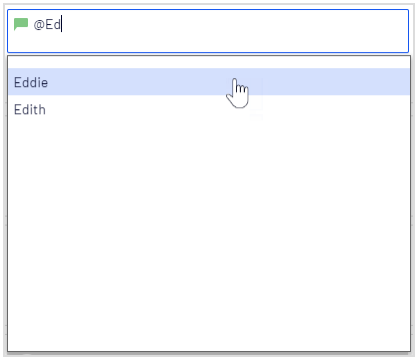
project item to see the actual comment.

> **Note:** All tagged users are notified in the user interface of comments. If you add comments on items associated with a project or items in review, tagged users may also receive email notifications.



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

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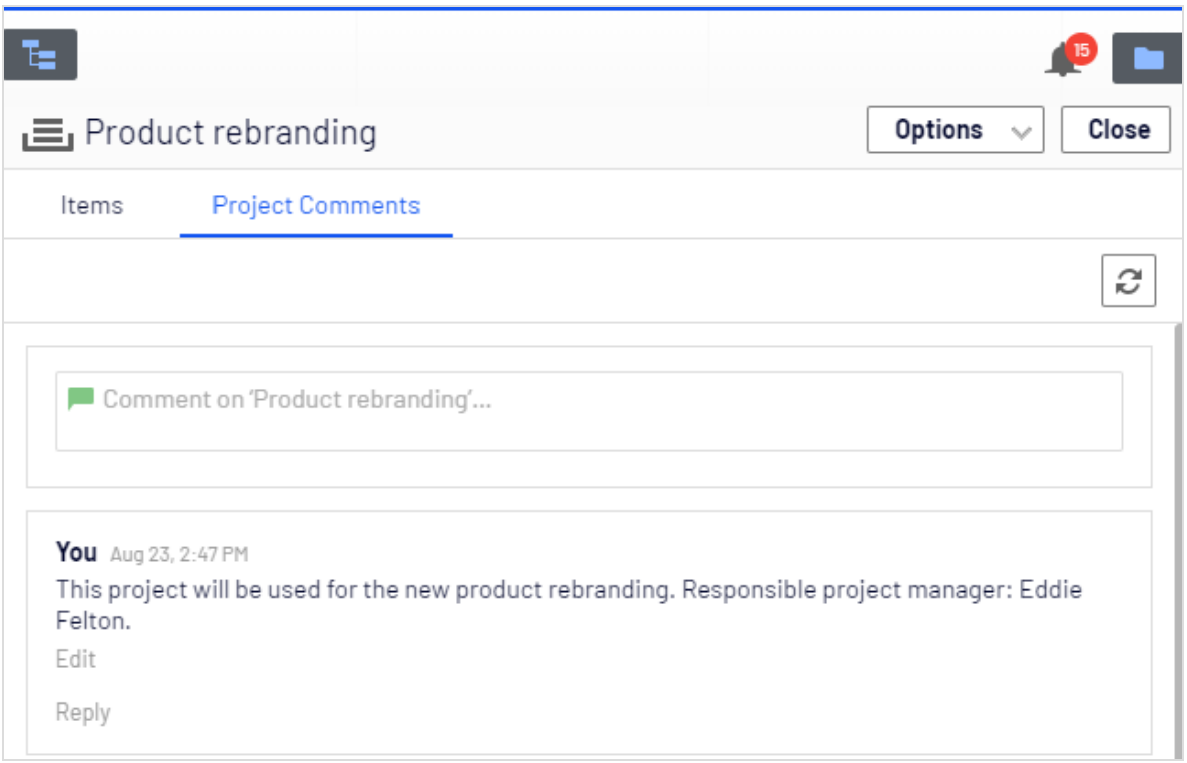

Image: Comment on project item

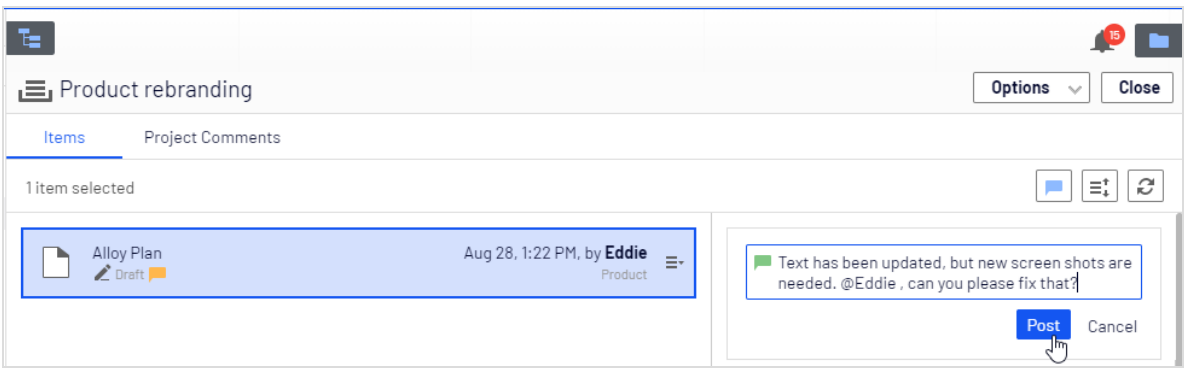

Image: Reply to comment on project item

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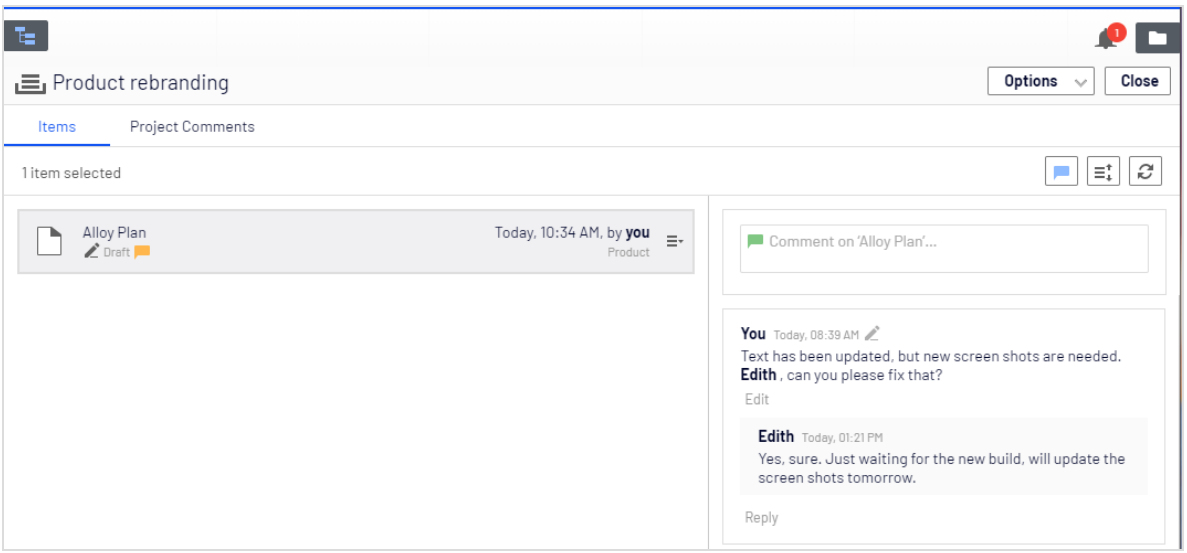
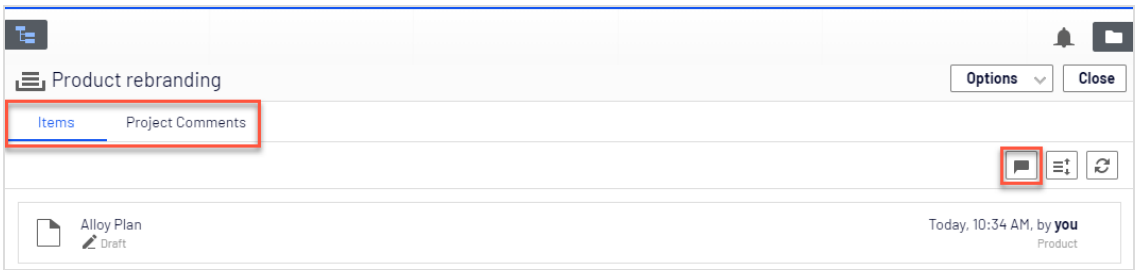


Adding a comment to a project or project item

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

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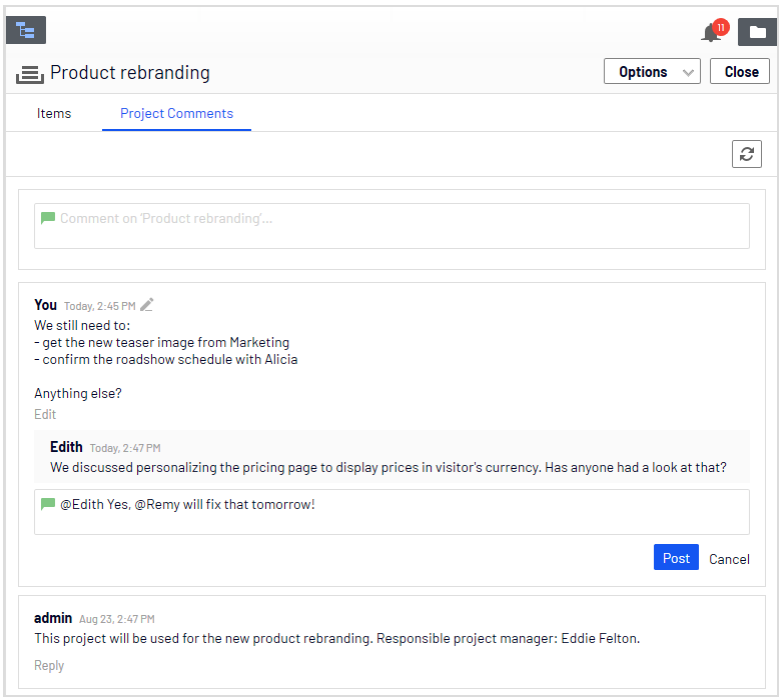
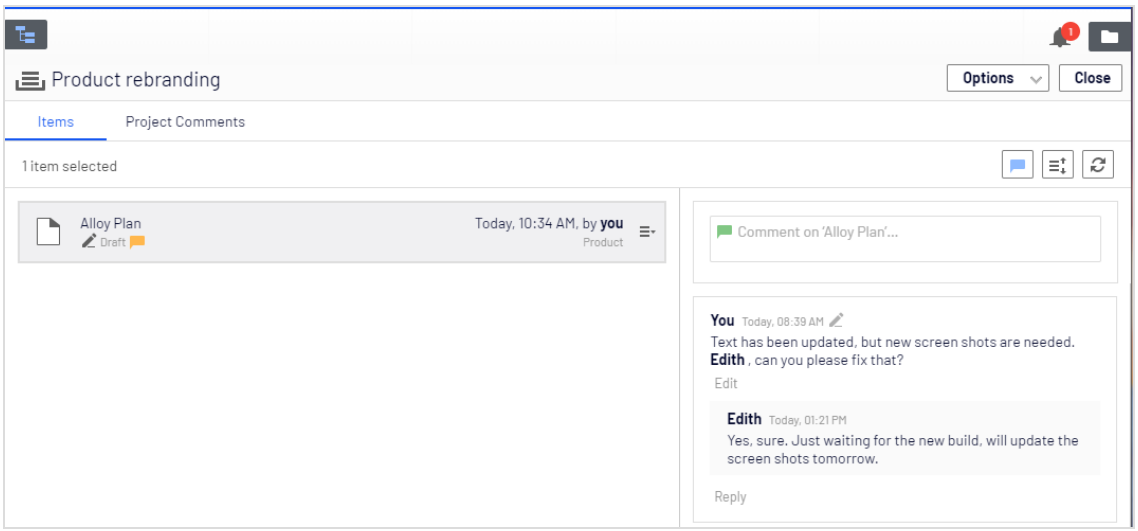


Image: Comments on project item



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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.

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Managing content

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

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

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

You can preview draft content before publishing, so that you can verify the content before publishing. When working with **personalization**[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.

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

Commerce-related content

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

Optimizing content to improve search

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

[1] Adapt 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.)

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Working with multiple languages

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

How does Episerver know which language to display to visitors? Episerver enforces the language to be visible in the URL, 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 Episerver Administrator User Guide.

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

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

Commerce and multiple languages

See Multi-language management in the Commerce section to work with multiple languages if you have Episerver Commerce installed.

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Episerver Find and multiple languages

See Optimizing multiple sites and languages to work with multiple languages if you have Episerver Find 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 Episerver CMS website, or product-related content on an e-commerce site. When a language is enabled in Episerver, content properties that are not **global** are available for translation. See 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: Languages add-on to extend the functionality in Episerver for translating content into multiple languages.

Switching language and viewing language versions

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

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

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

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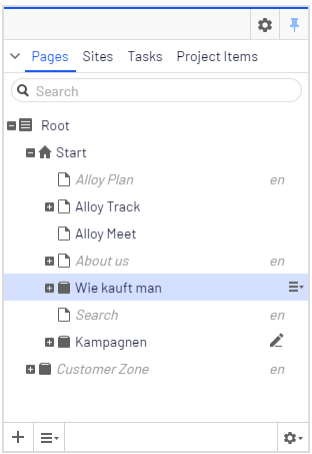

To view only pages that were translated, select **Show Content in Current Language Only** from the page tree's **Settings** button. This filters out all other language versions. You can also use this option in the assets pane and in the Versions gadget to view blocks and versions in the current language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

> **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.

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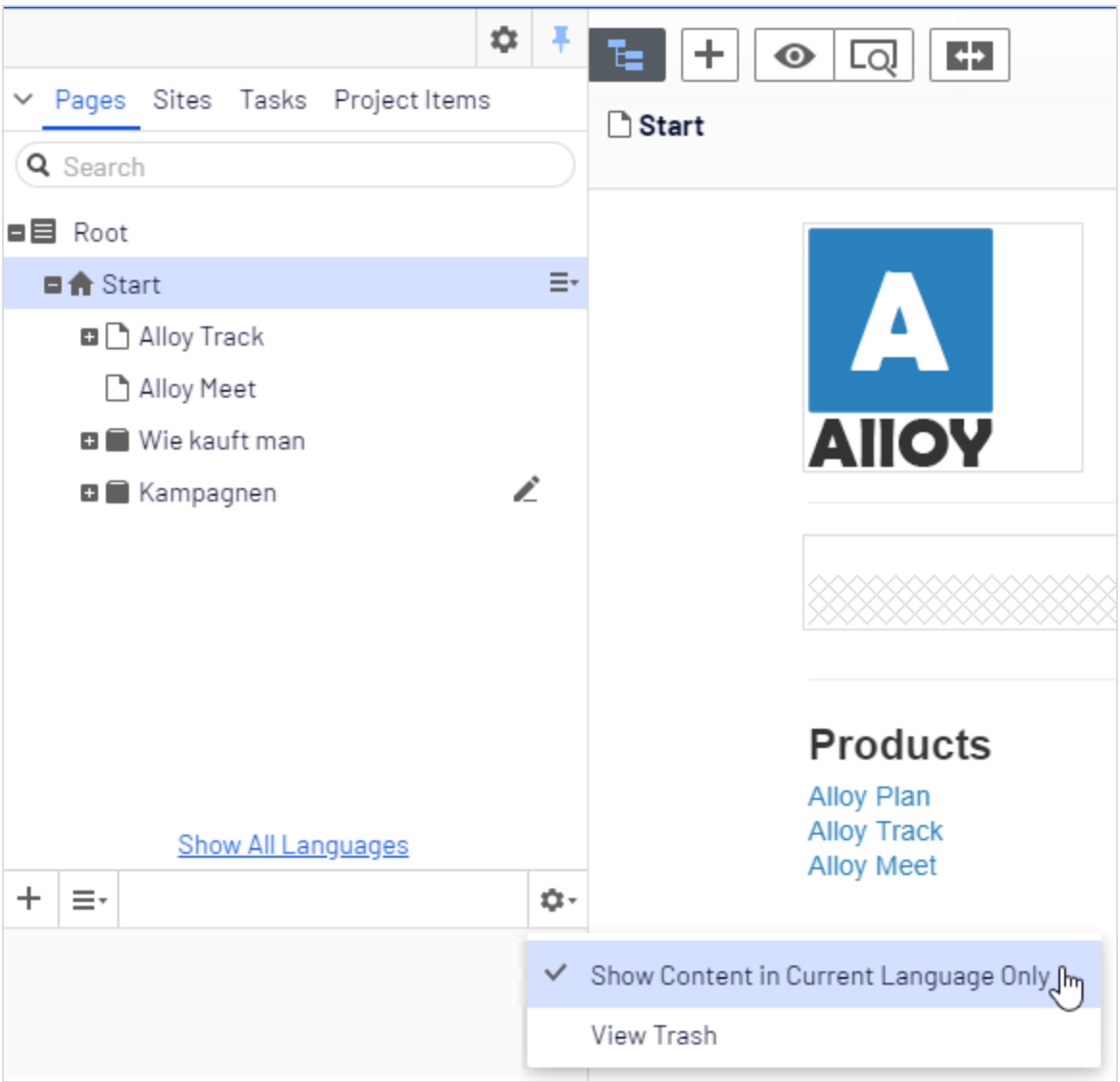

> **Tip:** The setting **Show Content in Current Language Only** is enabled for each pane or gadget instance individually. This means that you, for example, can add the Versions gadget twice and display only the current language in one of the instances and all languages in the other.

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.

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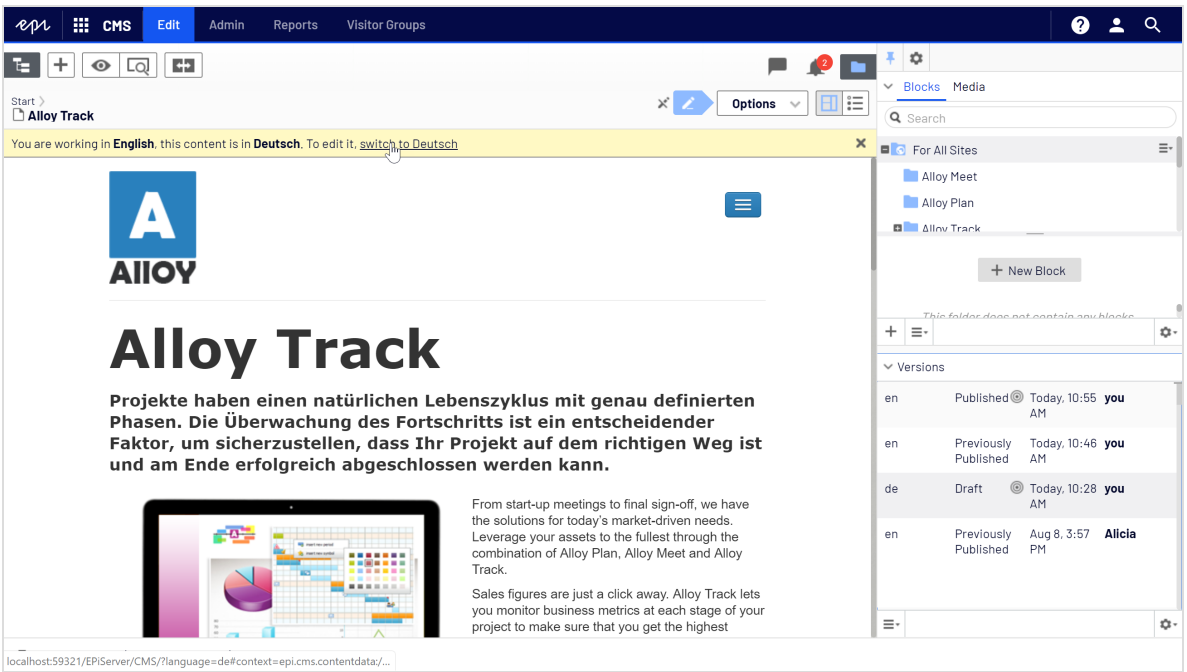
When you translate content, you can use the Versions gadget to see the different language versions for the content. By selecting a language in the version list, you can also switch to editing in another language using the switch option in the notification bar.



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.

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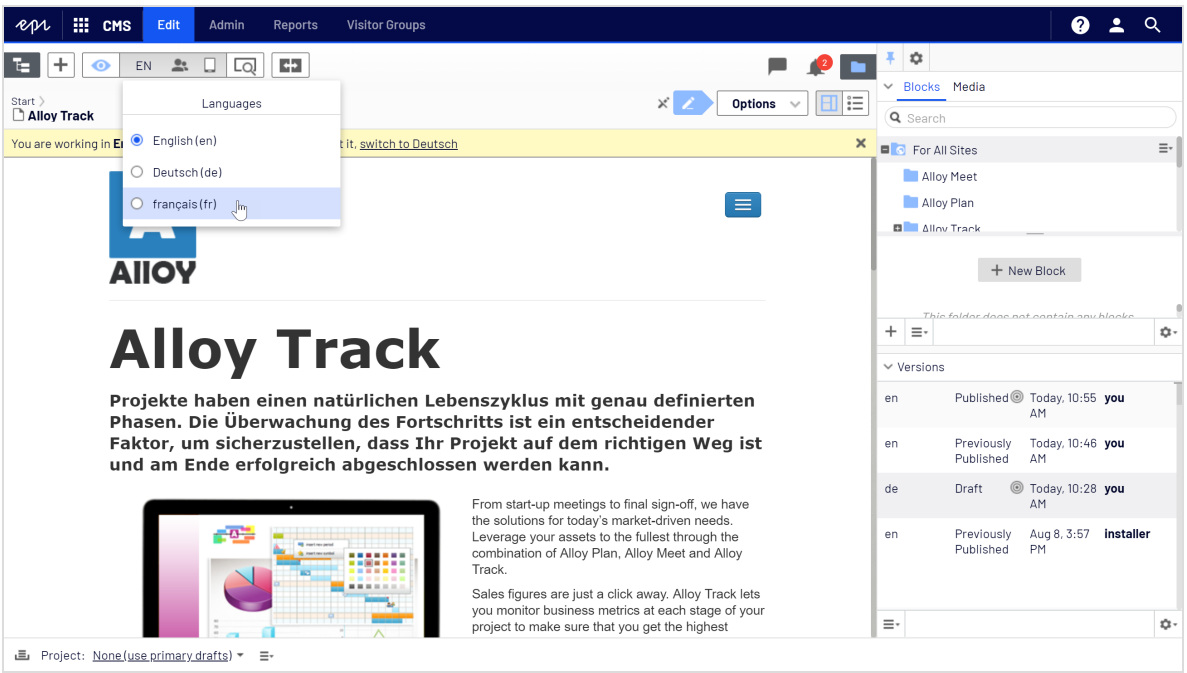

Deleting language versions

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:

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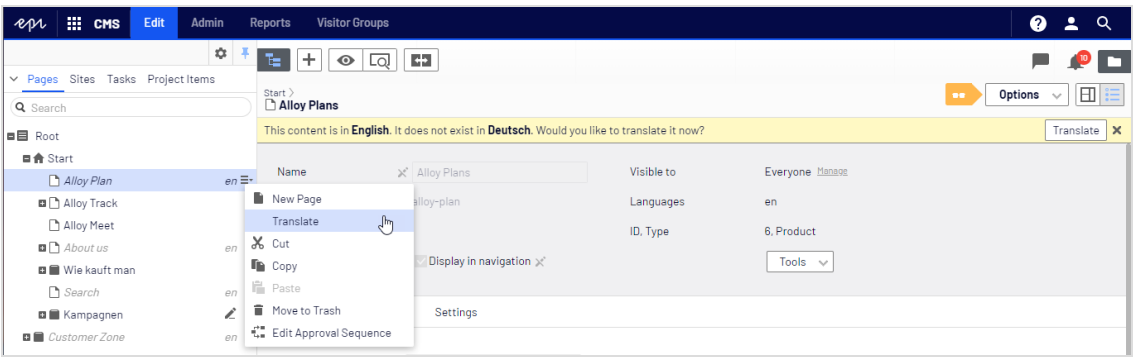
1. Under the **Sites** tab in the navigation pane, select the desired target language for translation. The interface reloads, and you are taken to the **Pages** tab.
2. In the page tree, select the desired page to translate, and then click **Translate** in the notification bar at the top. Or, select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

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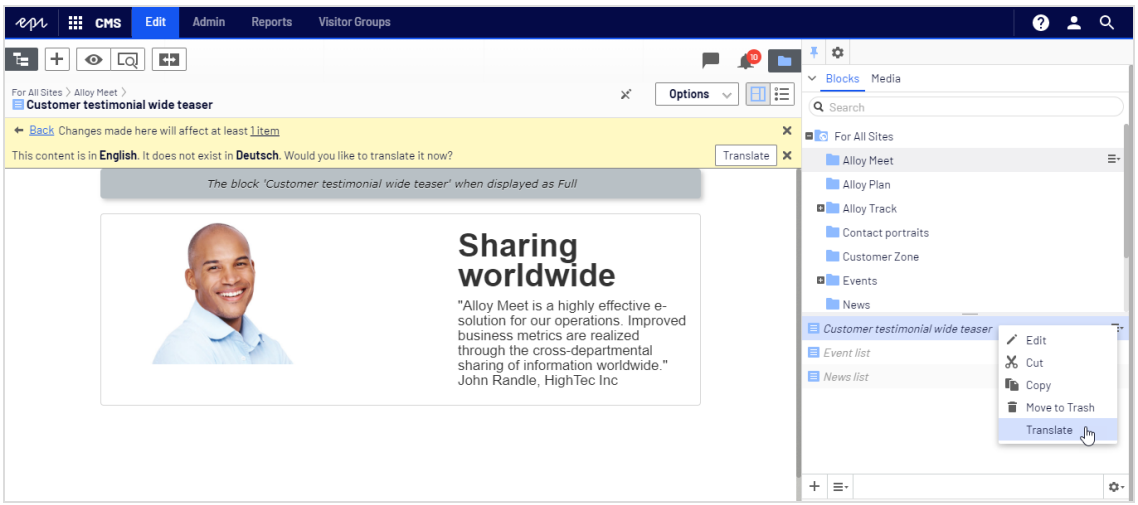
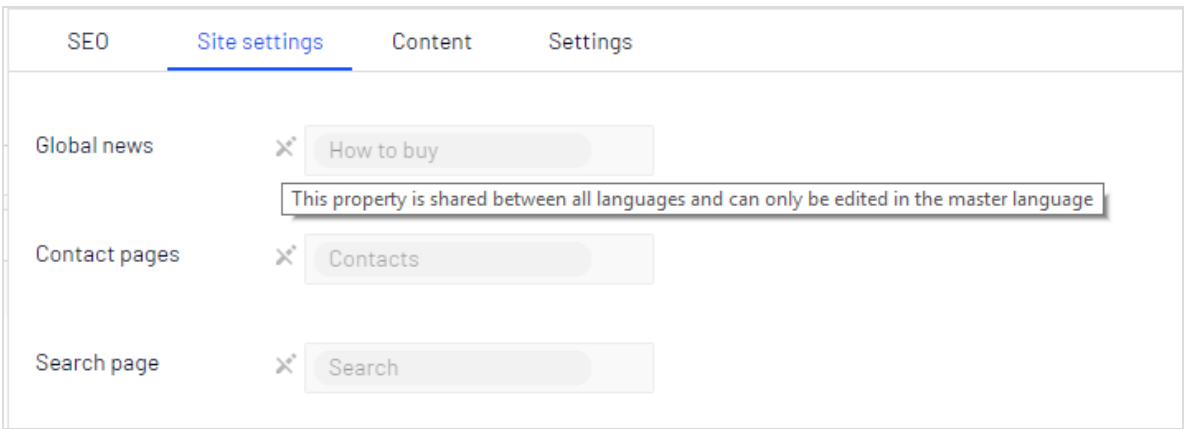


4. You can use the compare view to translate in one pane while seeing the original version in the other pane at the same time.
5. Edit the content and follow the content publishing flow to save and publish the translated block.

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.



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

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Creating new content in another language

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

Commerce and multiple languages

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

Fallback languages

For many multi-language websites, only parts of the website content exist in all available languages 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**.

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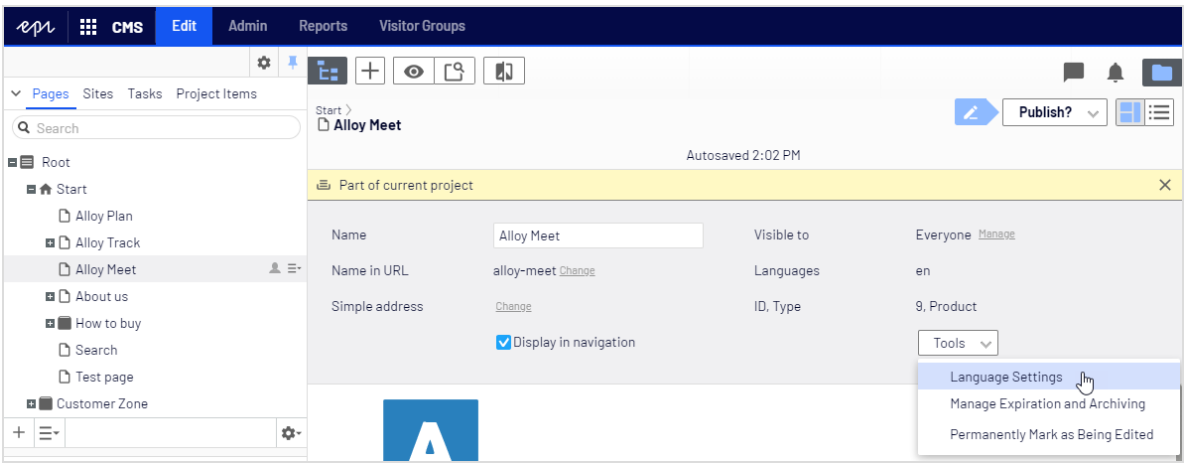

> **Note:** Language settings are inherited from the parent page. If you are redefining language settings for a subpage to a parent page with language settings defined, you need to deselect **Inherit settings from the parent page "xxx"** in the **Language Settings** dialog, to define settings for the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

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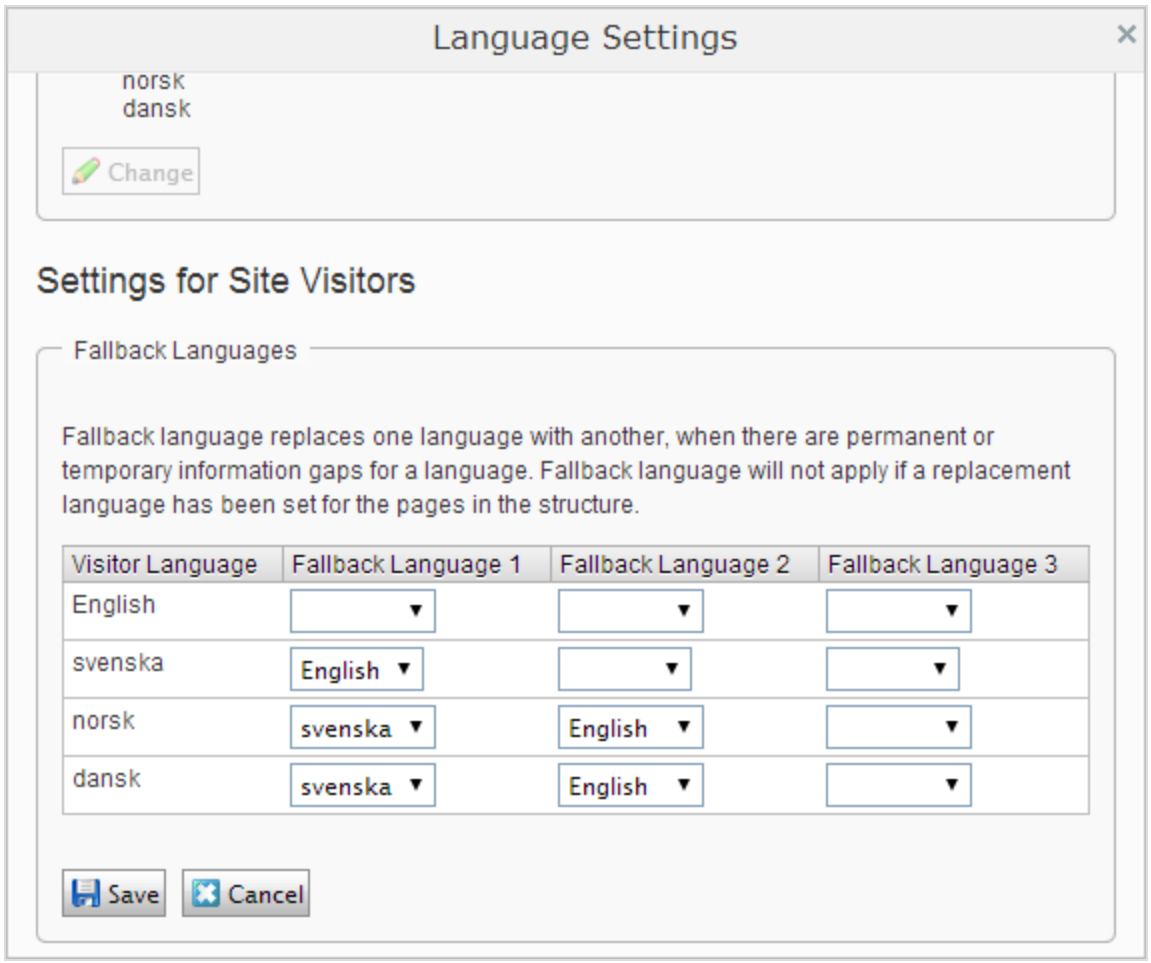

Example: replacement language

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.

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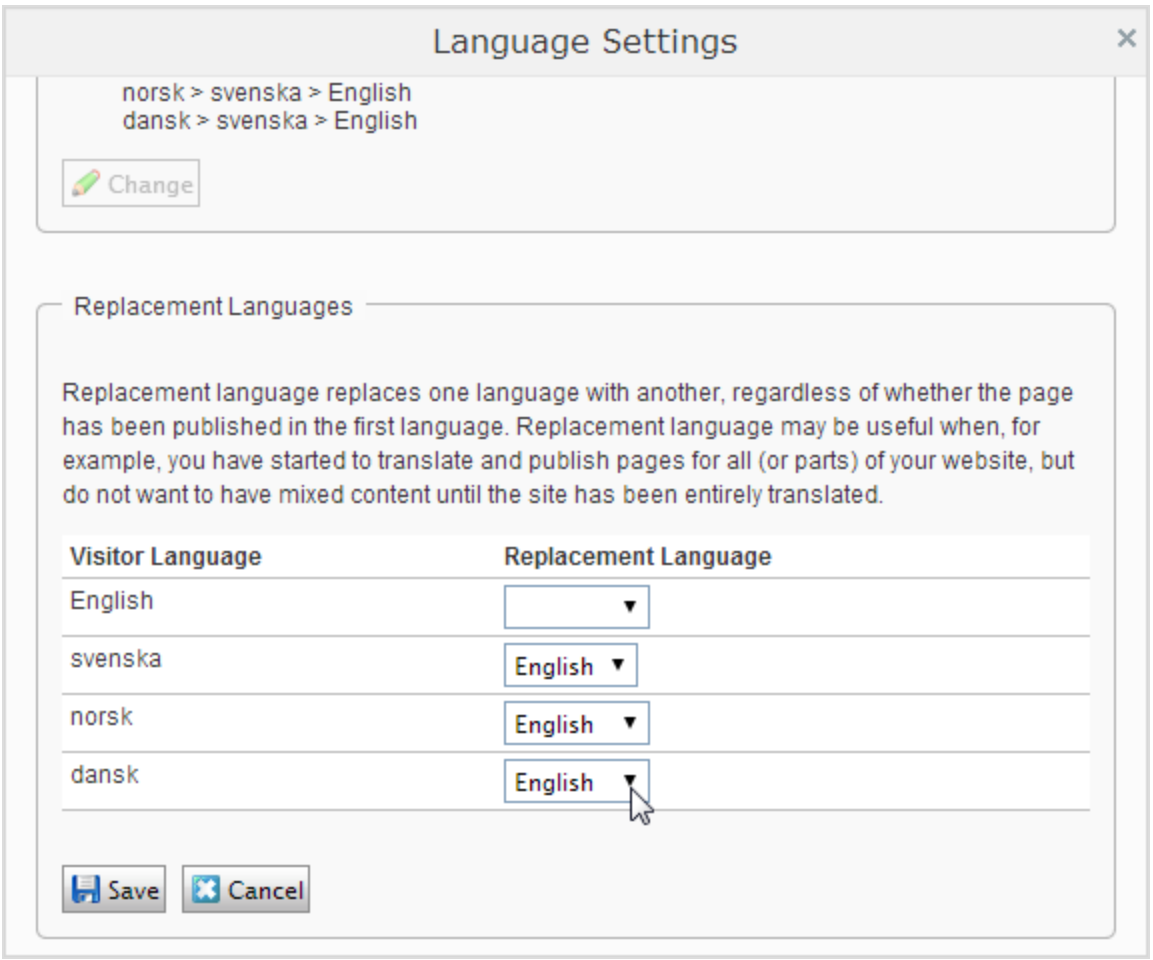

Another scenario for using replacement language is when you have started to translate content on your web-site, but do not want to have mixed languages until translation is completed. When translation is ready, you simply remove the replacement language.

See also

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

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Visitor groups

Visitor groups[1] is one way of working with in Episerver, using built-in functionality. You can, for example, design a product banner specifically for first-time visitors[2], or for visitors from a geographic region or market.

You can create your own visitor groups using a set of *visitor group criteria*. Visitor groups must first be created to become available for selection when applying personalization. There are numerous visitor group criteria available across the Episerver platform; see Administering visitor groups in the CMS Administrator User Guide.

Personalization with visitor groups

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

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

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

Applying personalization

In the rich-text editor

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

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

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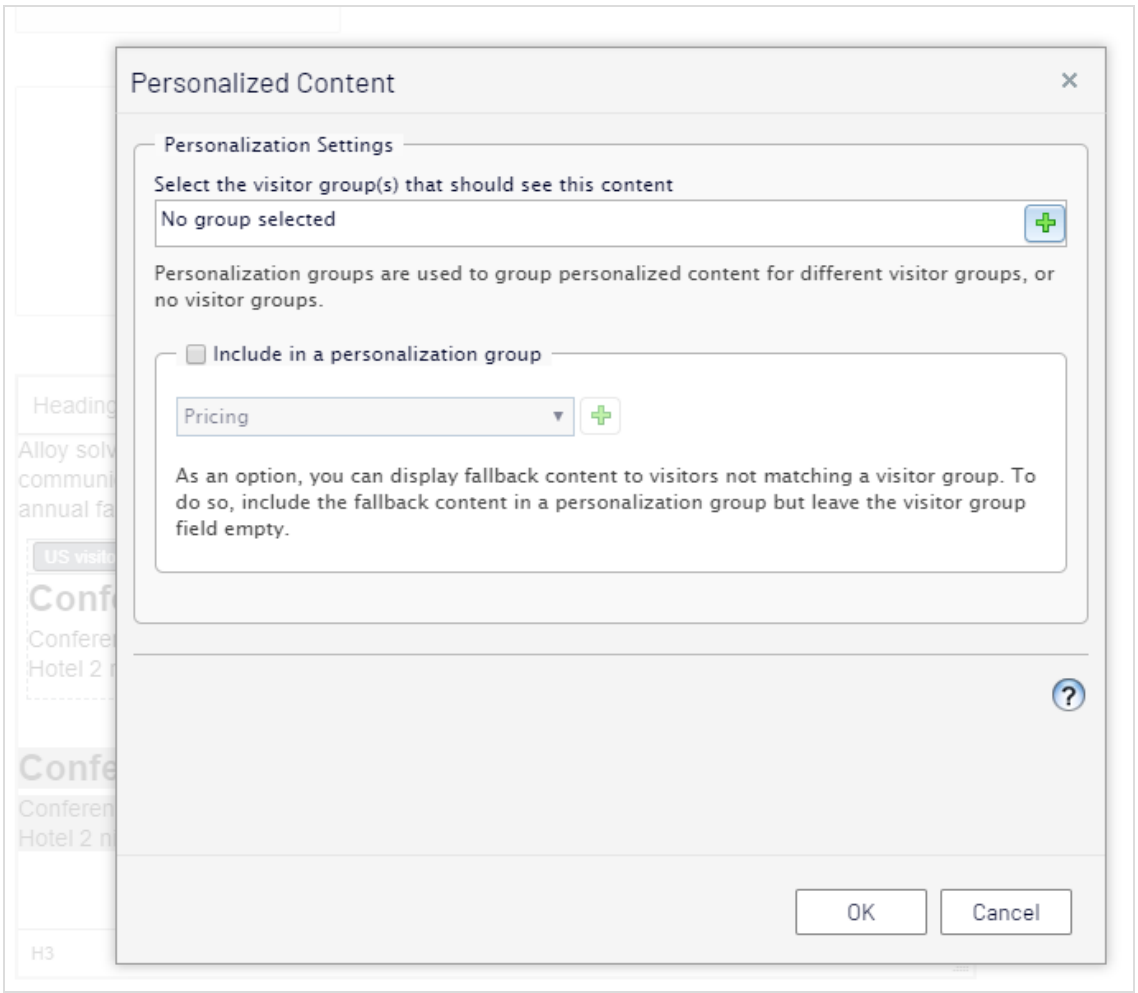
3. Select one or more visitor groups from the list.



4. Preview the personalized content to verify the result.

In the content area

1. Open the page for editing, and select the content you want to personalize in the content area.
2. Select **Personalize** from the context menu.

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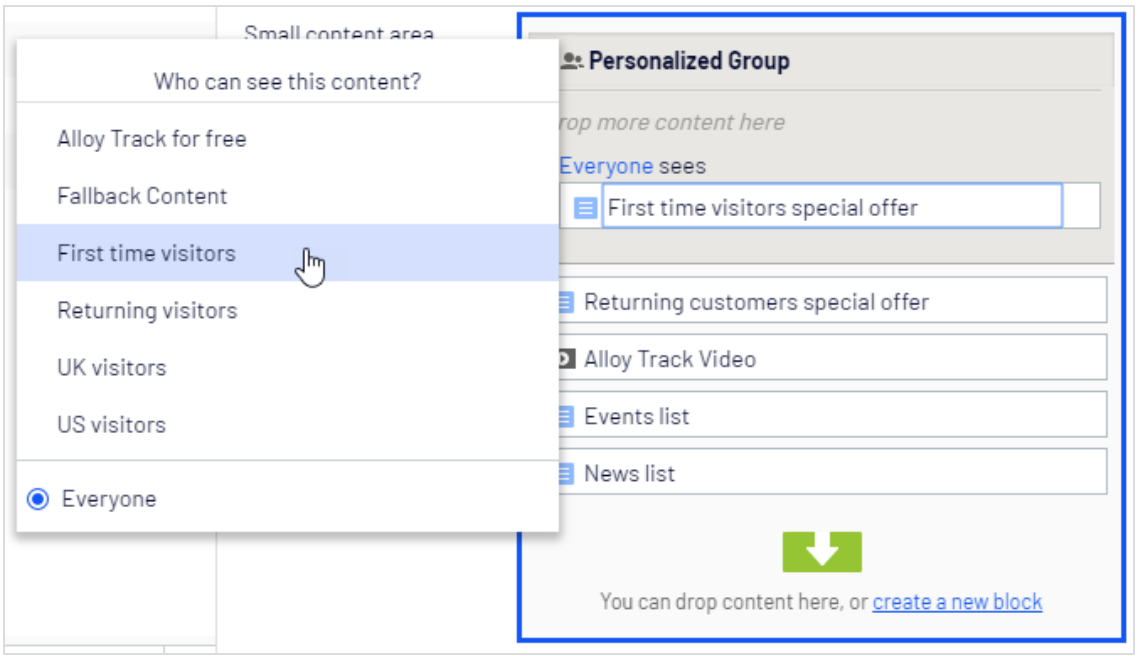
3. Select one or more visitor groups from the list.



4. Preview the personalized content to verify the result.

Editing and removing personalization settings

In the rich-text editor

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

In the content area

Expand the desired **Personalized Group** section and click the desired visitor group link to edit the settings. To exclude content from personalization [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

[1] Adapt 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.)

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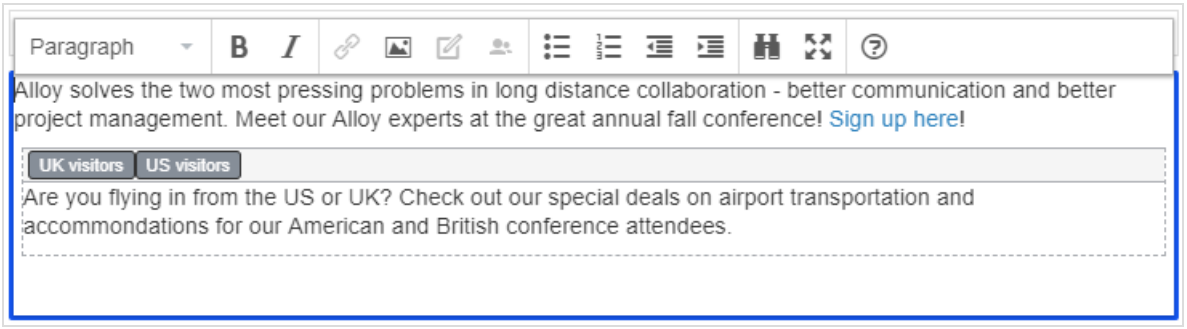
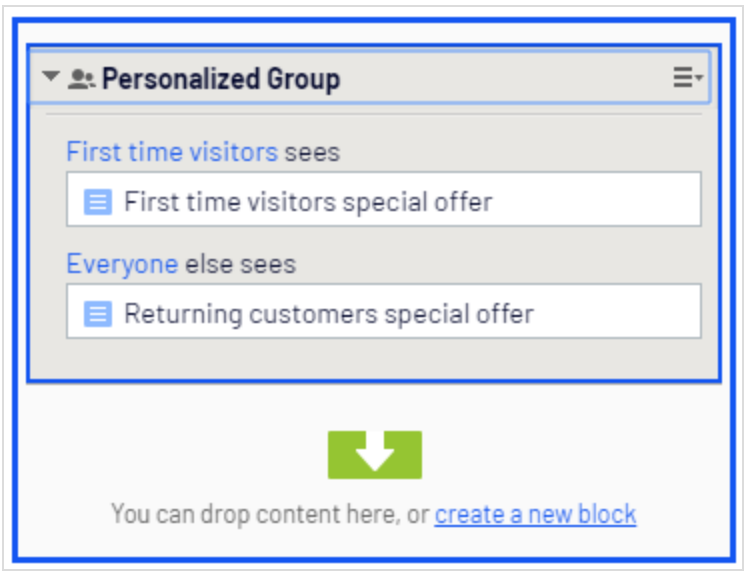


The non-personalized text at the top of the rich-text editor in this example is always displayed. The personalized text appears **only** to visitors matching any of the visitor groups **UK visitors** and **US visitors**.

In the content area



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.

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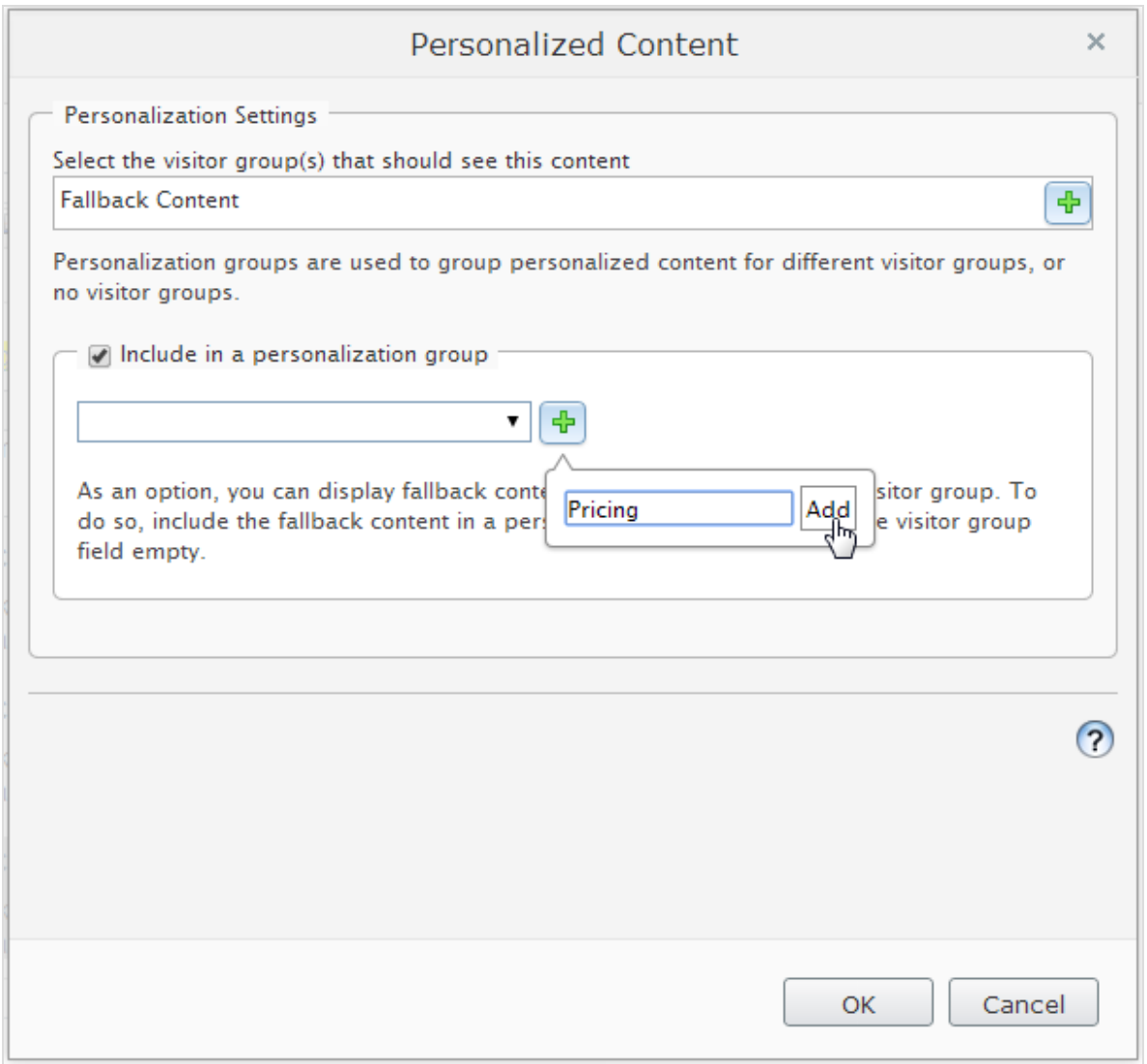
In the rich-text editor

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



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.

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

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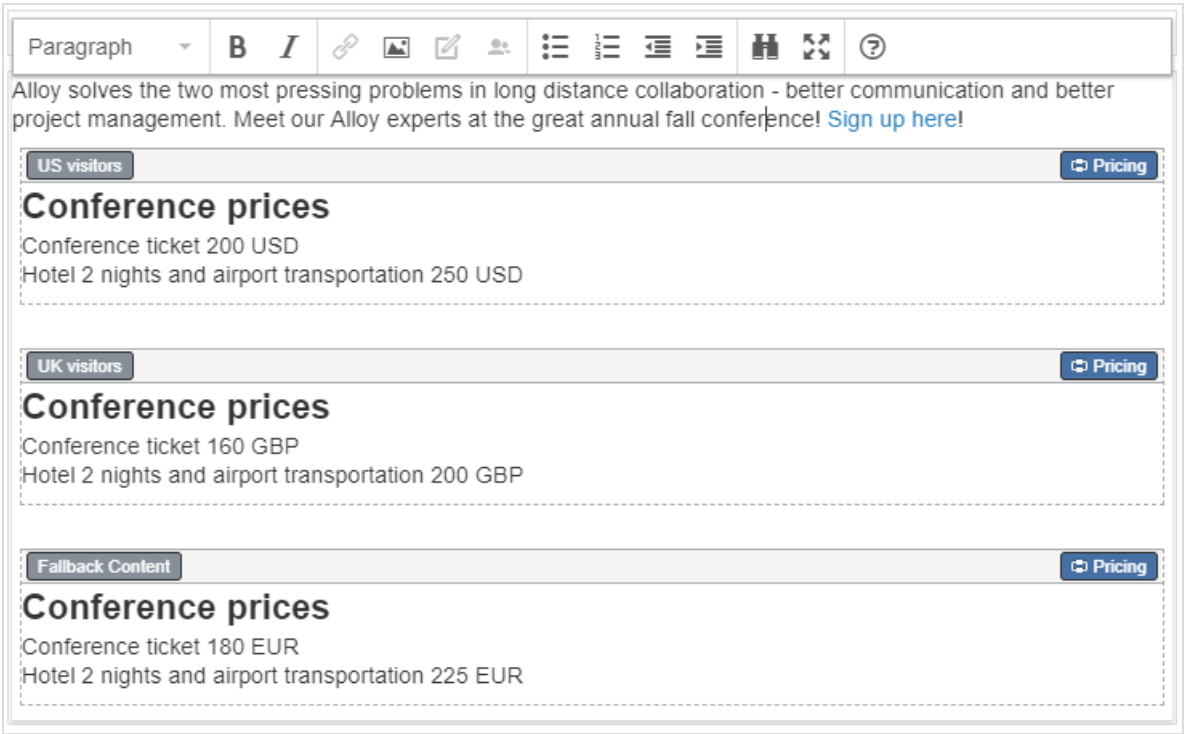

Now the personalization for this content is matched within the same personalization group.

In the content area

This example shows pricing information as individual blocks, and the **Default pricing** is the fallback content displayed to visitors from other countries than the UK and US. Select **Personalization** in the context menu for a block to create a personalization group, and drag the other blocks into the group.

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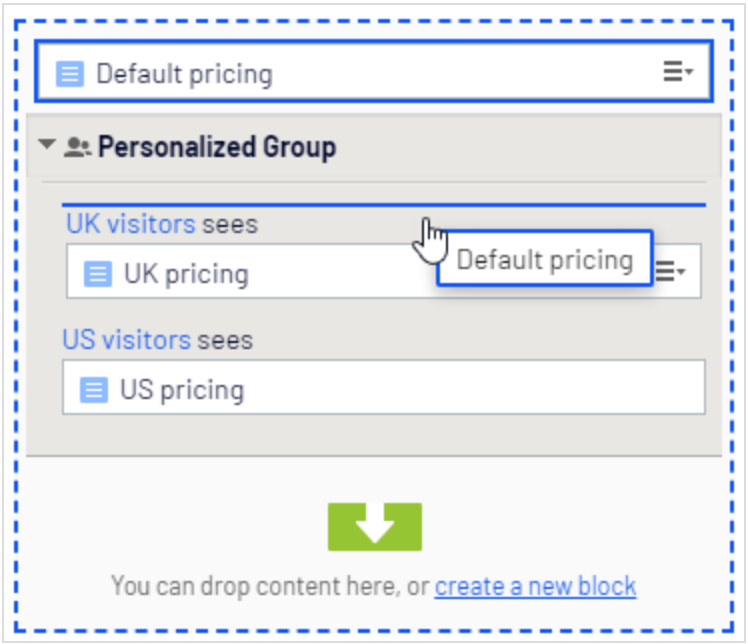
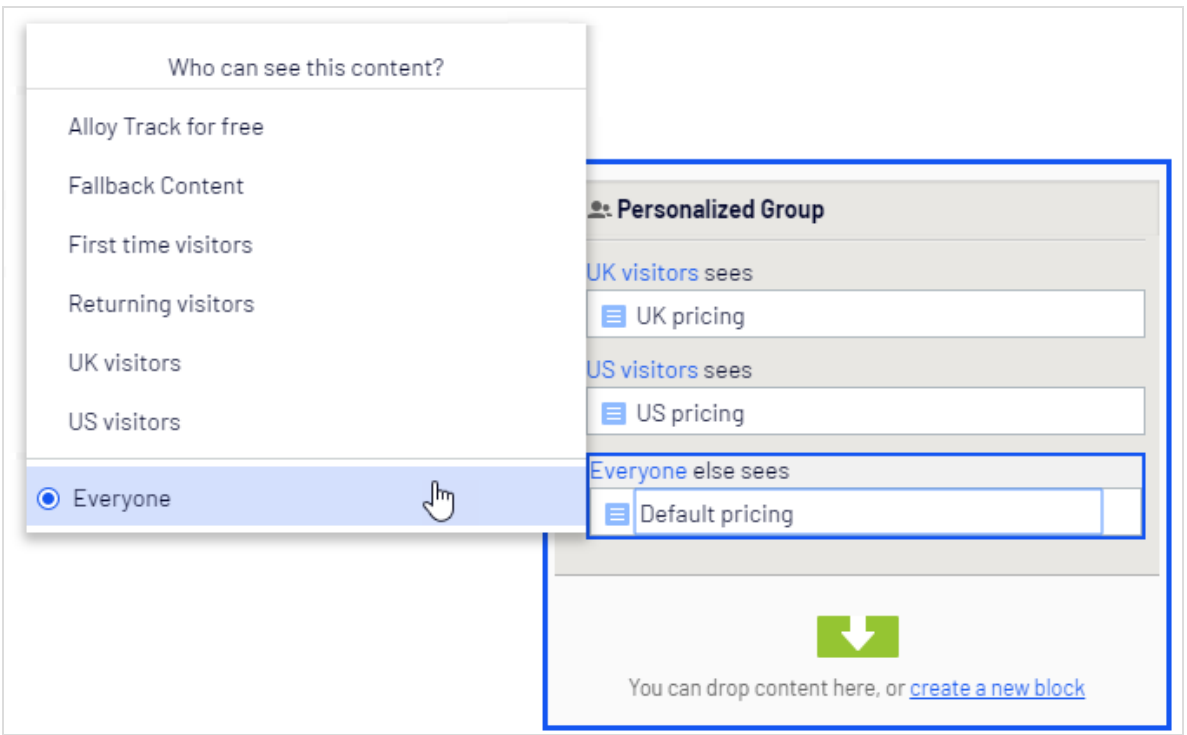


Personalize each block within the group by applying the appropriate visitor group. Use the **Everyone** option to display the fallback content displayed to visitors not matching any visitor group.



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Providing access to content using visitor groups

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

Monitoring visitor group activities

You can monitor visitor group activities by following the number of visits to personalized content. The result appears using the visitor groups statistics gadget[1] on the Episerver dashboard; see Gadgets.

Personalizing Commerce content

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

Personalization using add-ons

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

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

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

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

[1] Small application component that is responsible for its own rendering and behavior, accessible from the dashboard or the panes in the Episerver user interface. A gadget can contain functionality that you can use within the gadget interface or link away to other products integrated in Episerver (for example, a direct link to CMS / Pages where you can use the classic editing view features).

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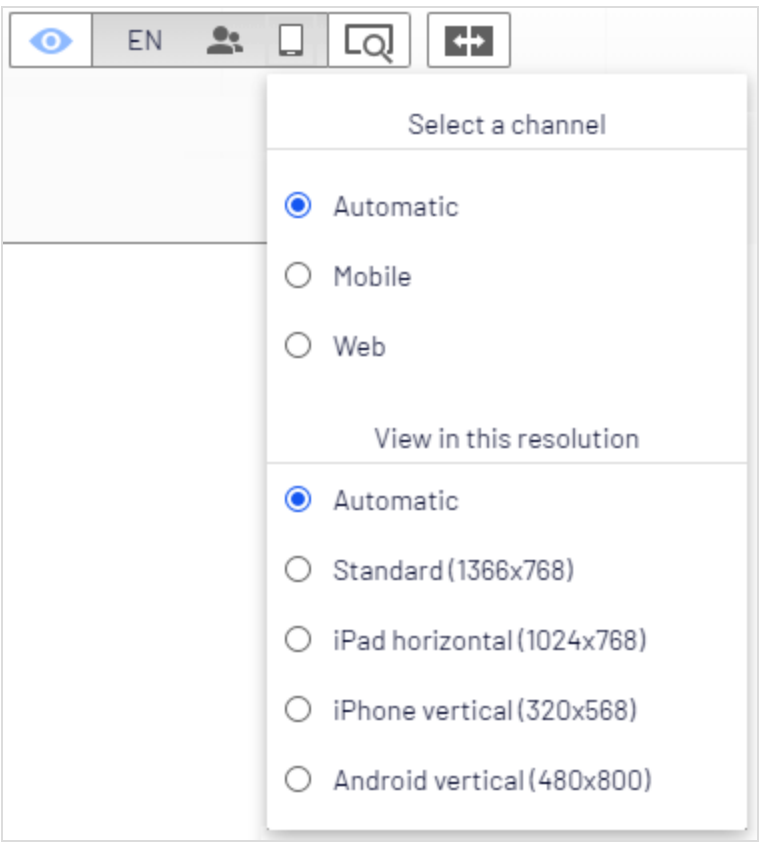
Previewing content

In Episerver, you can preview content while you are editing to view content as visitors will see it when published.

The **preview** button hides the surrounding on-page editing frames and panes and you can navigate through your website.

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

- **You are not using projects or you are using projects via the projects gadget.** The preview option displays 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.



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

Options	Button	Description
Languages	EN	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.
Projects		Navigate and view the contents of a project to verify the display before publishing. **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.

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.

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Comparing versions

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

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

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

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

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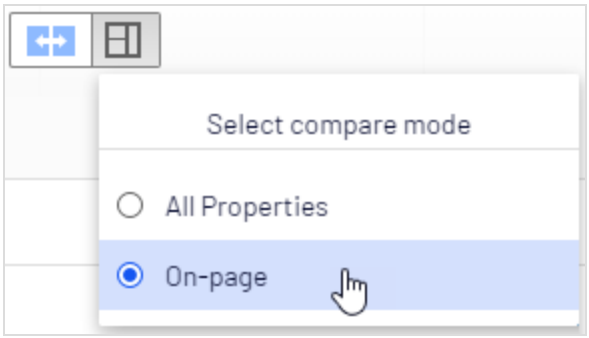
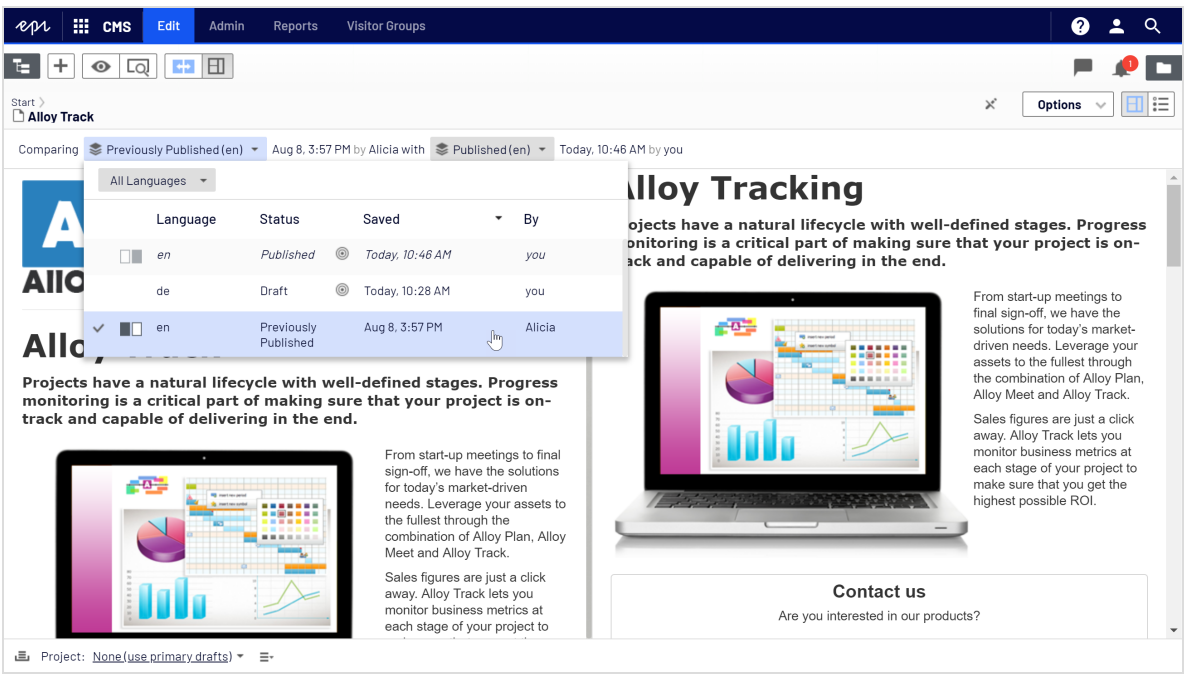


The notification bar displays two drop-down menu from which you can choose which versions to compare. By default, the draft is shown in the left pane and the currently published version in the right. All language versions of the content are listed by default.

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.



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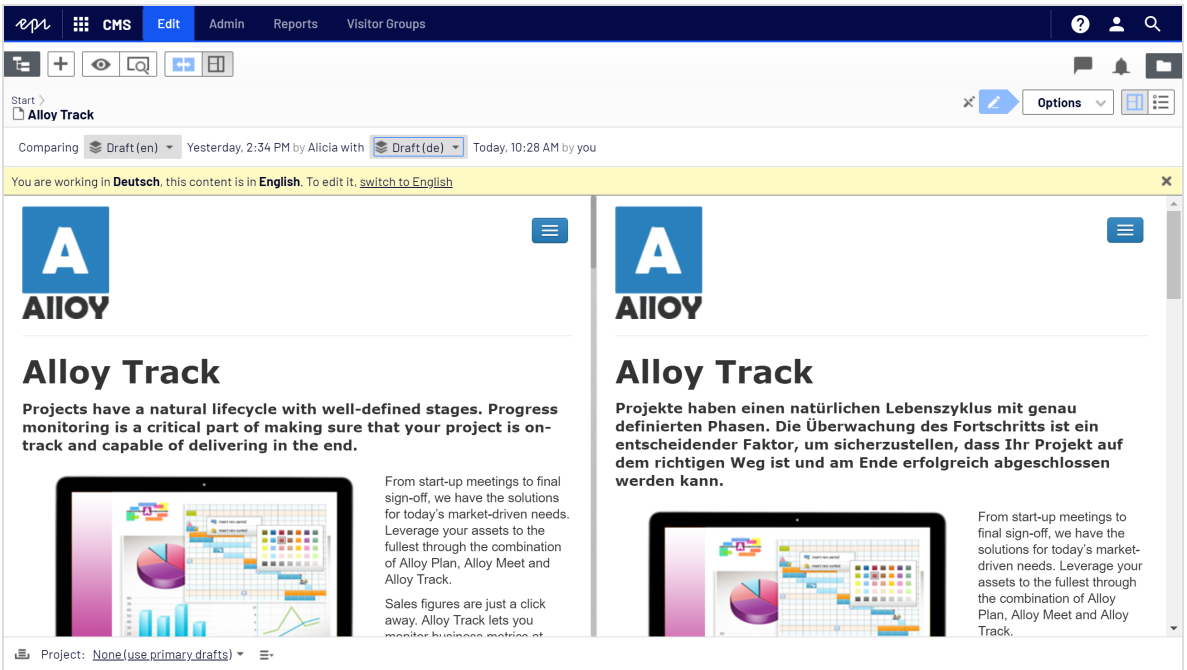
Comparing language versions when translating content

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.

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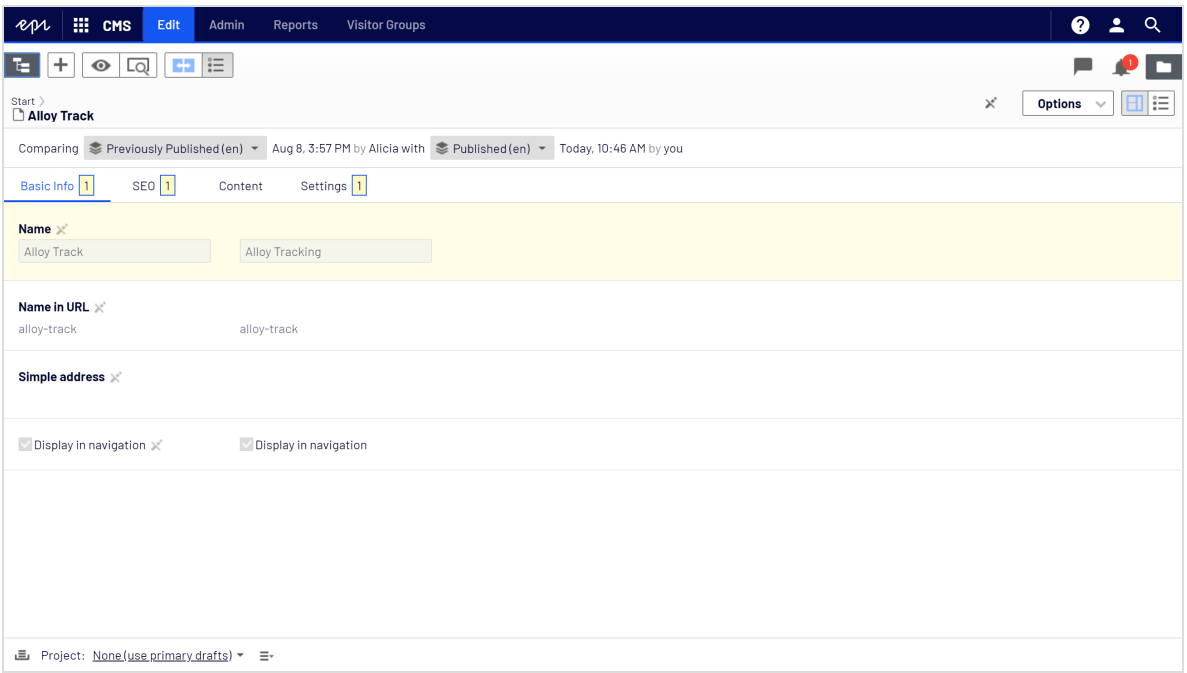

You can edit the latest version of the properties, and if you decide that you prefer the older version to the newer, you can click **Copy** and the older version is used in the newer version also. When you edit a published property, a new draft appears in the version list.

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. Setting access rights from the edit view only affects the selected item (page or block).

To set access rights, open the item in the All properties edit view (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.

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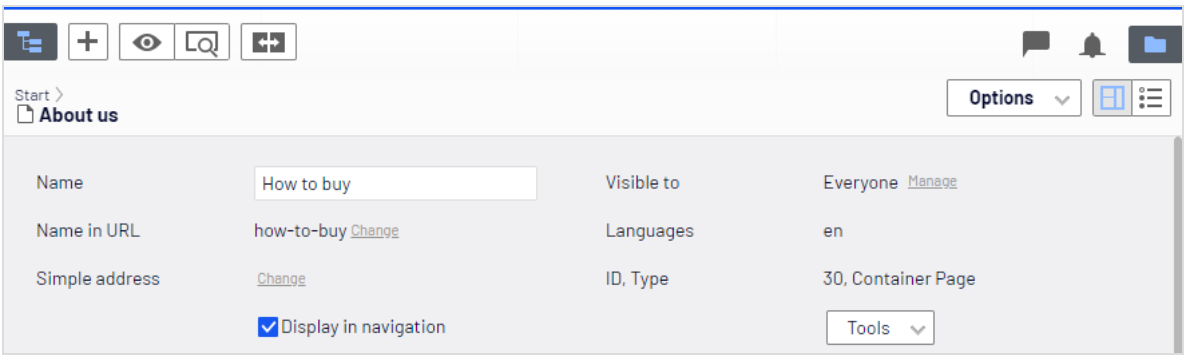
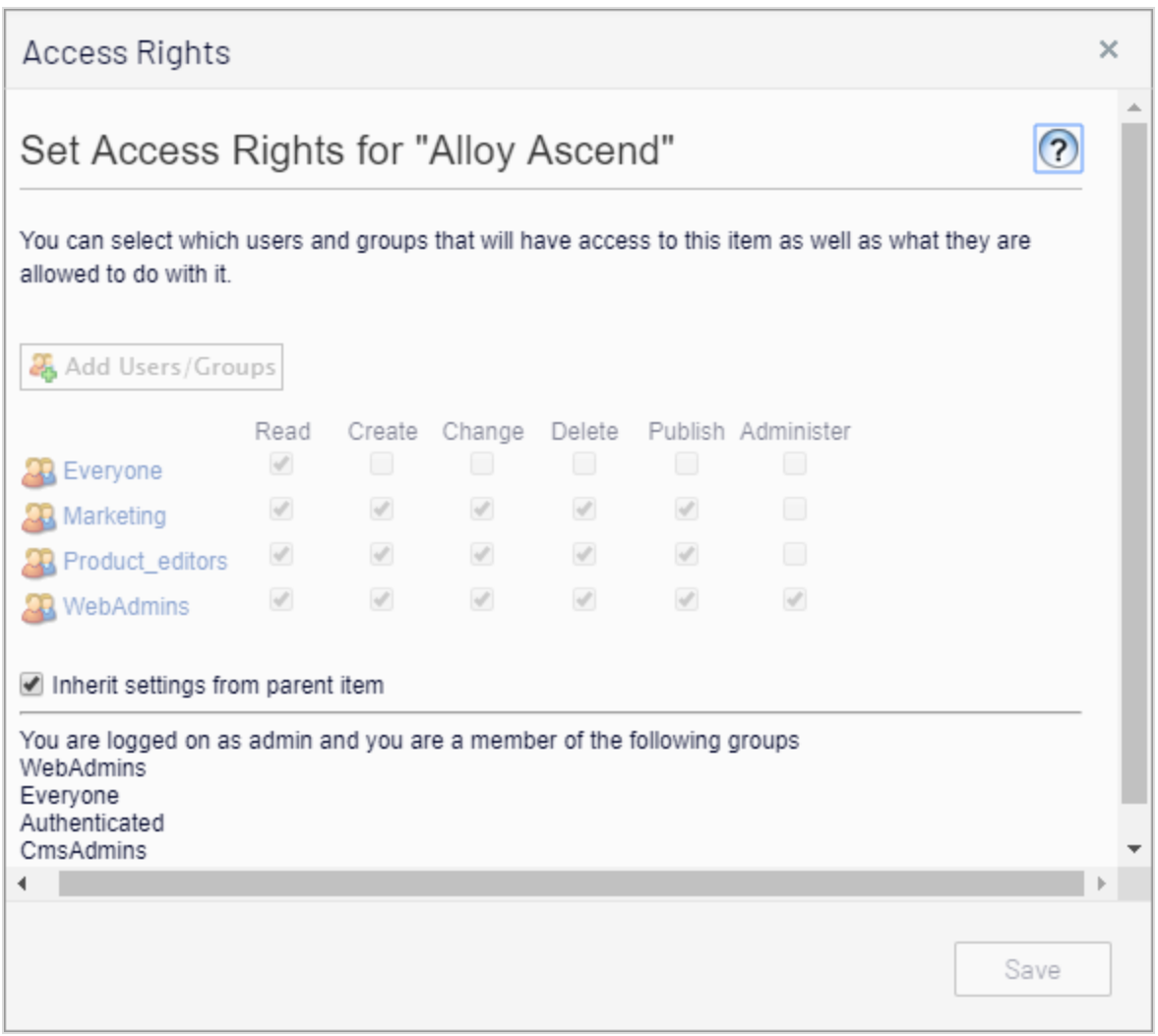


Click **Manage** to change the settings in the **Access Rights** dialog:



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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 Episerver CMS.

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

Structuring the website

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

Page tree

By moving the mouse pointer 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 Episerver 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 Episerver CMS** under Shortcut in Working in All properties editing view.

Container page used for storing other pages; not visible on the website.

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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).

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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.

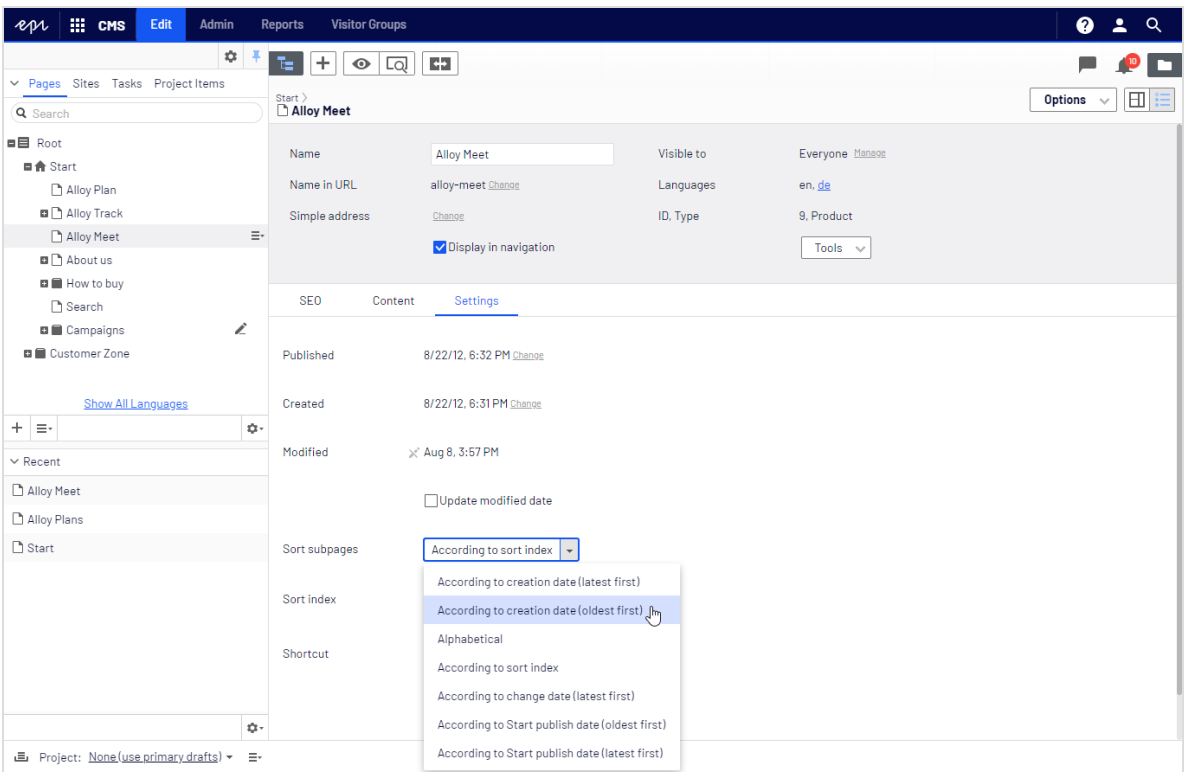
> **Note:** When you copy and paste a page under the same node, the **Name in URL** property of the copied page is typically named **Name in URL1**, which you need to change after copying.

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.



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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.

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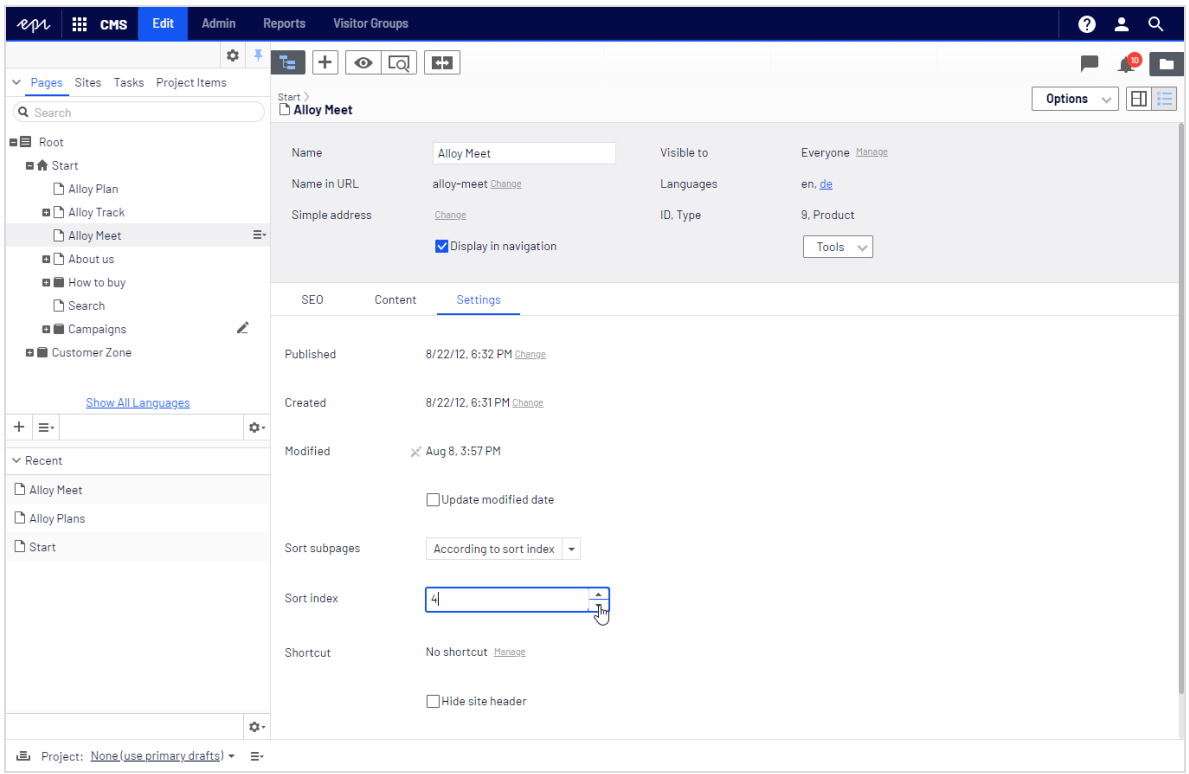

Deleting and restoring content

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

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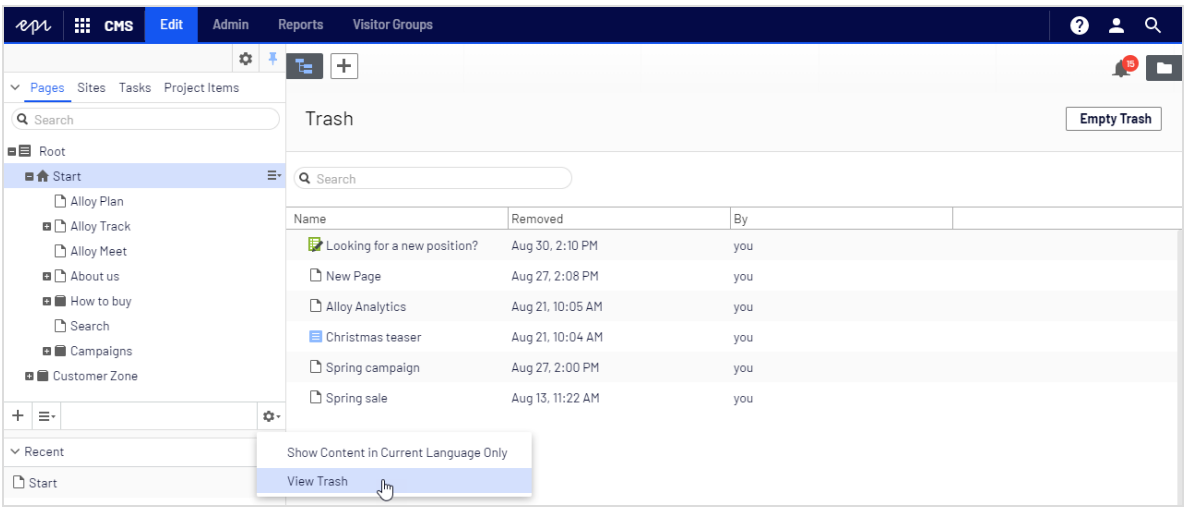

> **Note:** Episerver Commerce does not support trash management when deleting catalog entries.

Moving content to trash

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

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

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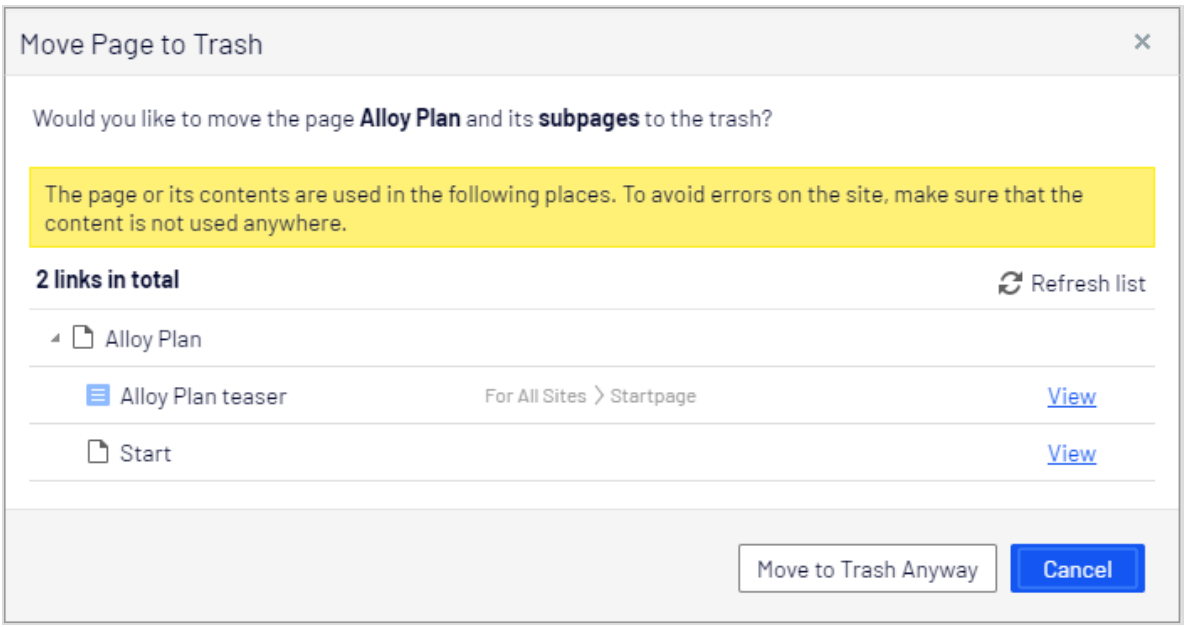
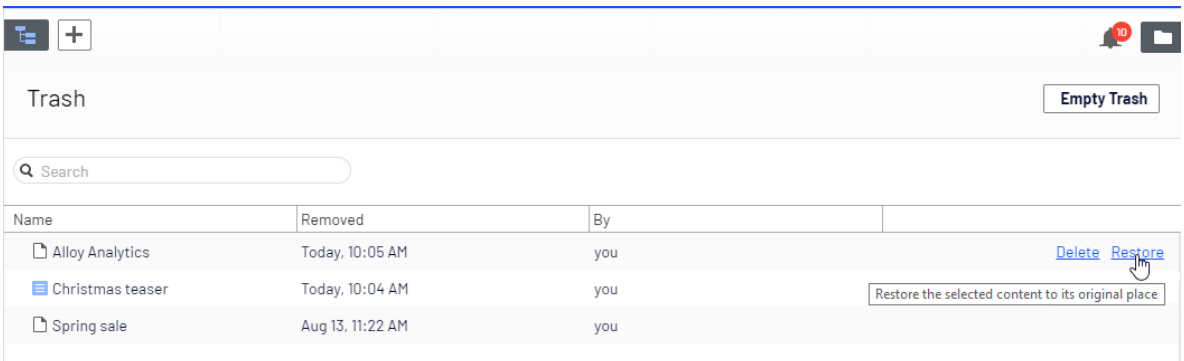


> **Note:** Content versions are not supported by trash management. So, when deleting a version in the versions gadget, the version is permanently deleted.

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.



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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.

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Working with versions

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

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

> **Tip:** You can watch the following demonstration video, Video: 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.

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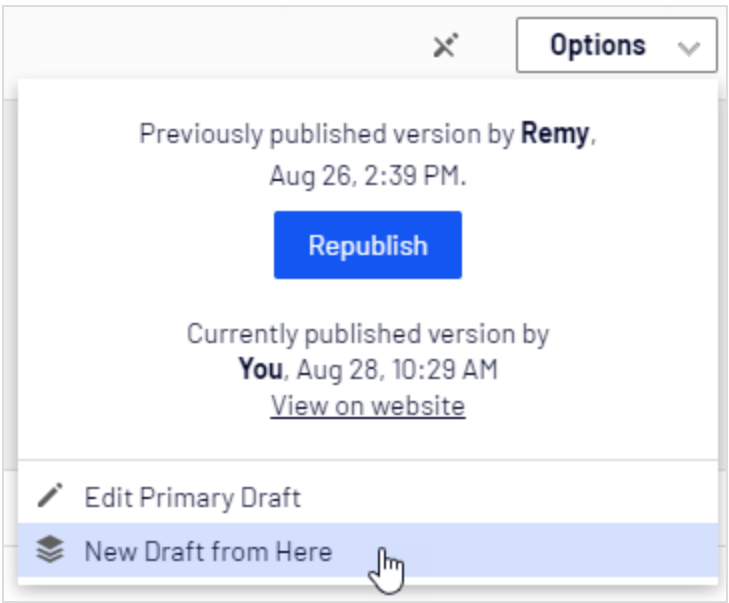
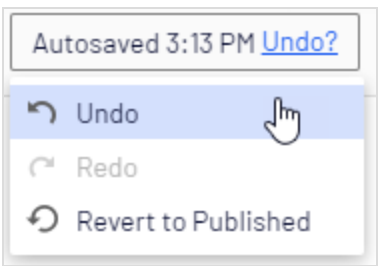


Undoing and reverting to published

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 avail-

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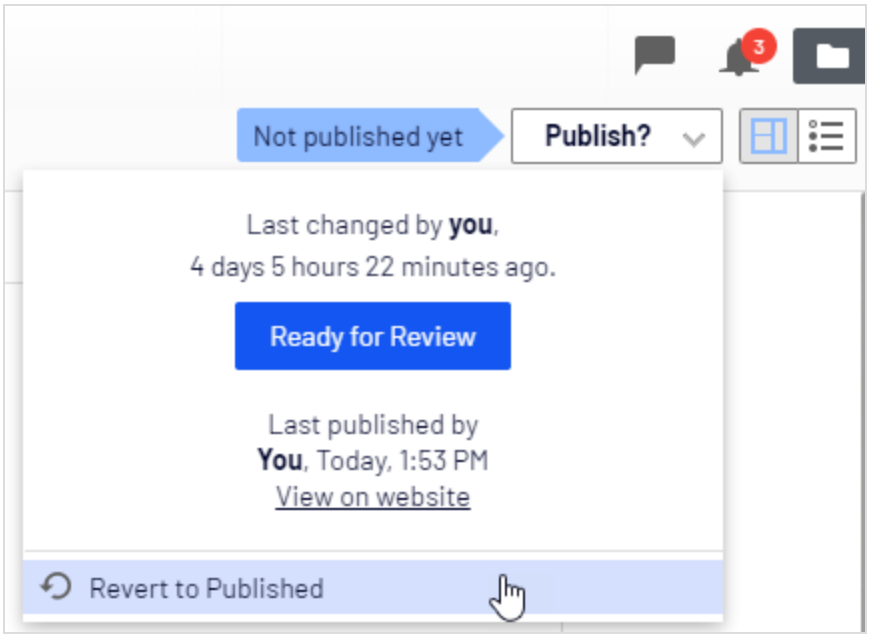
able on the Publish menu.



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.

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.

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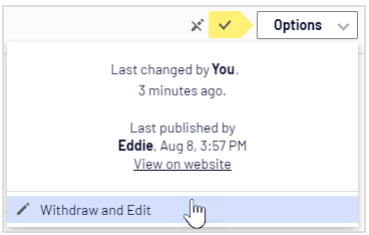
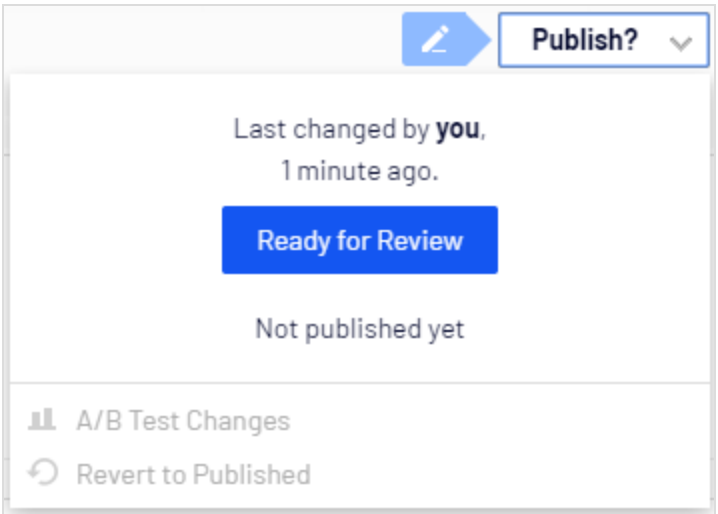


Setting Ready for Review

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.

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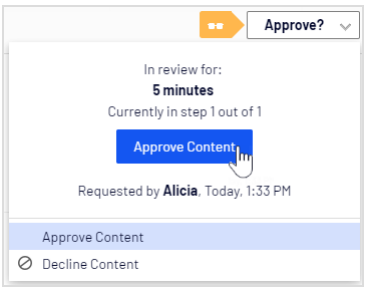
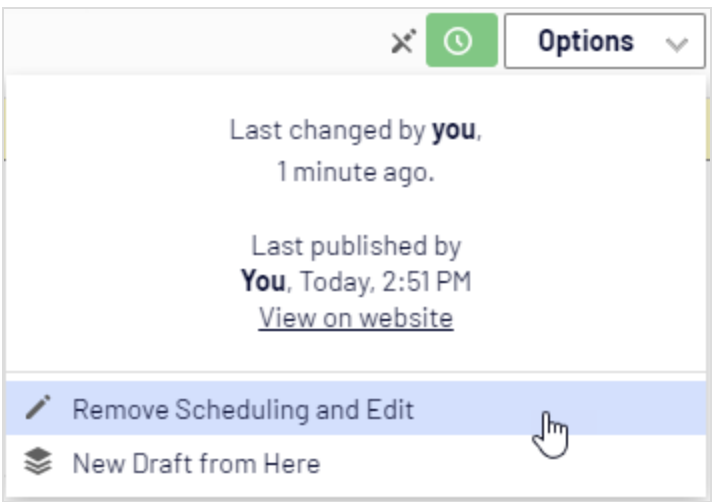


Scheduling for later publishing

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.

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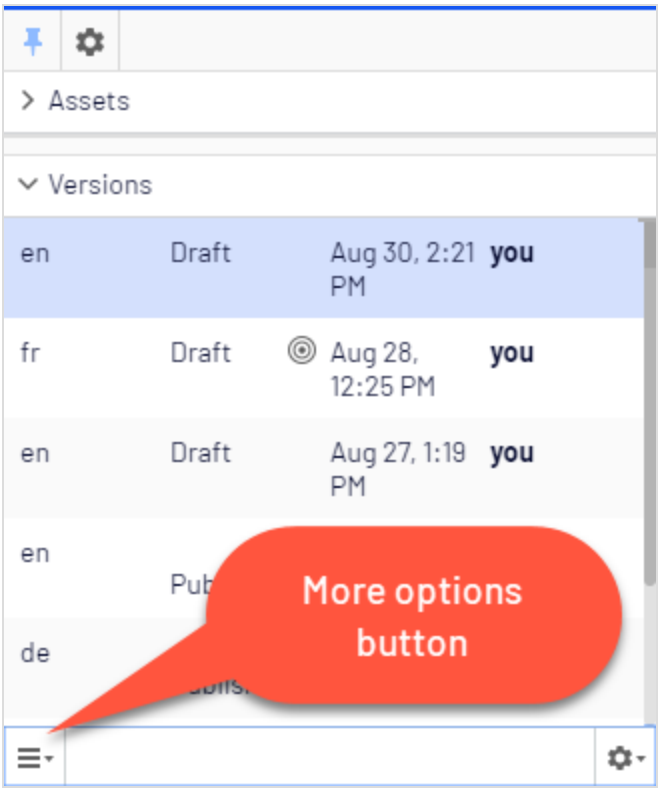
Managing versions

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.



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:

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- **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.

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

Setting the primary draft

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

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

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

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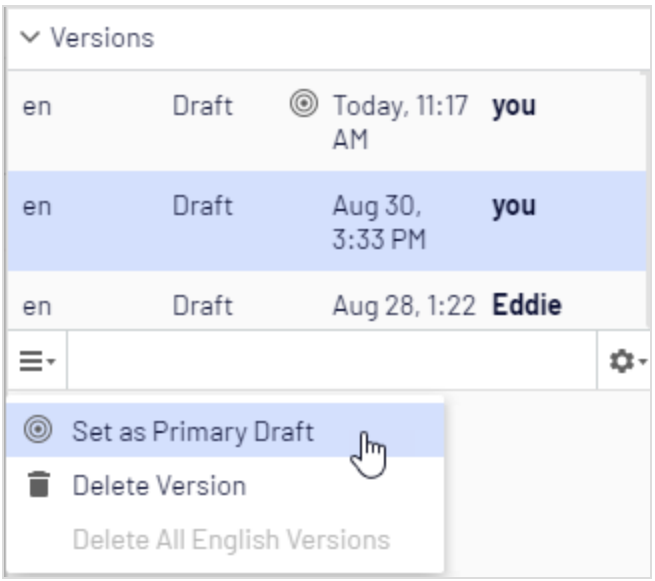

A content item that is not published can have only one draft. You can create multiple drafts from published versions, each draft is editable individually and you can schedule for publishing at different times. There are no versioning of drafts so there is only one version of each draft.

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.

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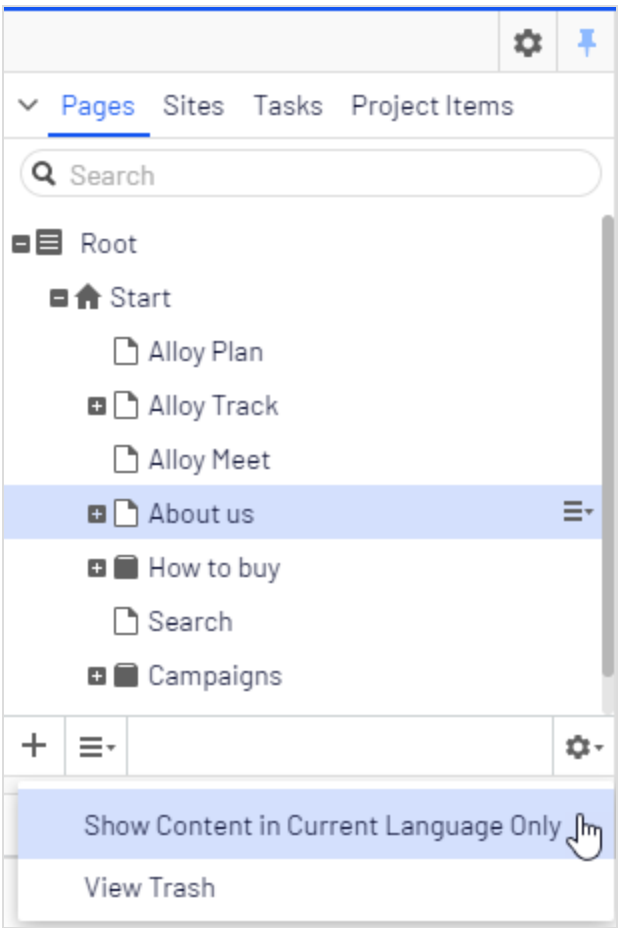

Republishing a version

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.

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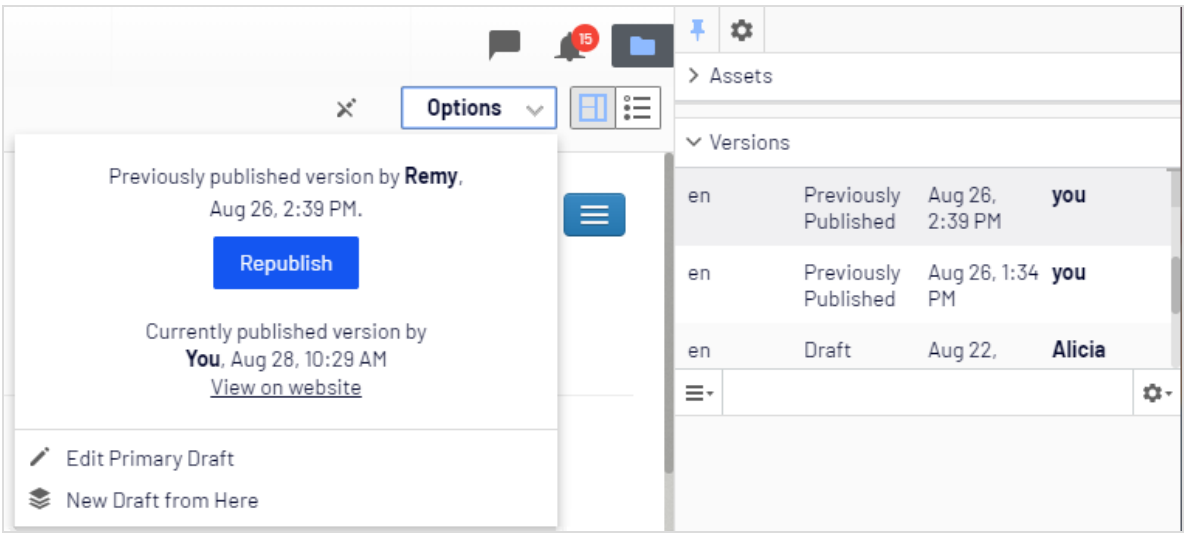

> **Note:** You can only republish a previously published version if no approval sequence has been defined on the content item. If an approval sequence has been defined, you must select **New Draft from Here**, set the new draft to **Ready for Review** and then let the draft be approved before it can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

Unpublishing content

Unpublished content in Episerver 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 Episerver 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

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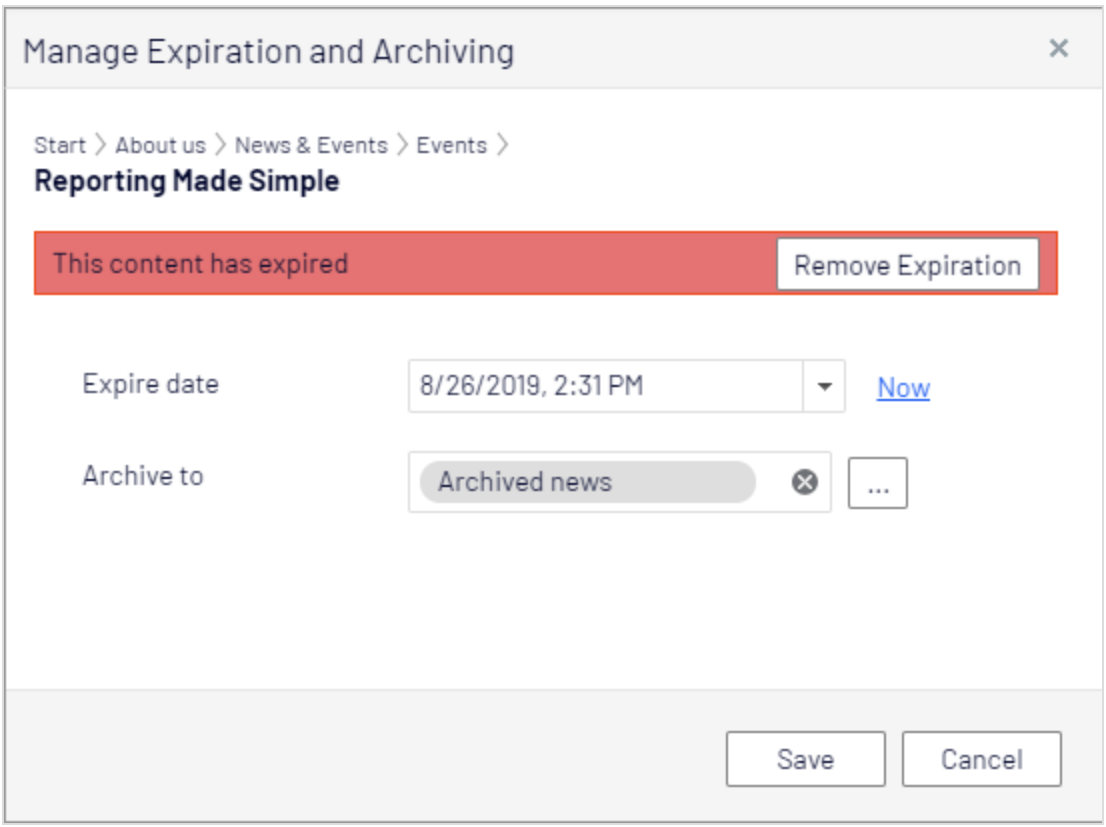
> draft from the latest published version and publishes that draft, it will still be expired and not displayed on the website. You must manually remove the expiration for the page to be public.

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

Episerver has a built-in archiving feature where pages with a set *stop publish time* are automatically moved to a defined archive branch when the time has passed. This is useful 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.



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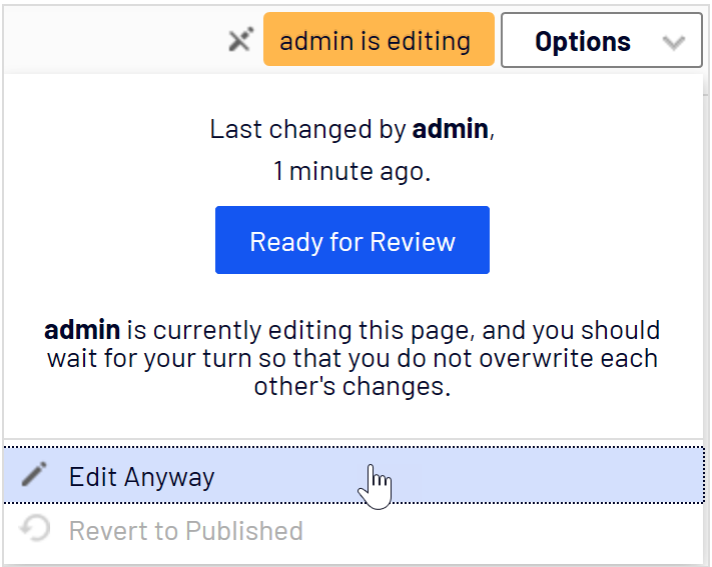
Working with shared content

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

Note: A/B testing is an add-on for the Episerver Digital Experience platform. It

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requires a separate installation, but no additional license. Contact your system administrator to find out more. See Episerver World - A/B testing for technical information.

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 impeccable testing has several predefined conversion goals you can use when setting up a test, and it is also possible for Episerver developers to create customized conversion goals.

Tip: You can watch the following demonstration video, 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[2]. You set the A/B test to use the conversion goal *Landing Page*, which measures how many visitors click on 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.

[1] When 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.
[2] The page that defines the end goal of a conversion path.

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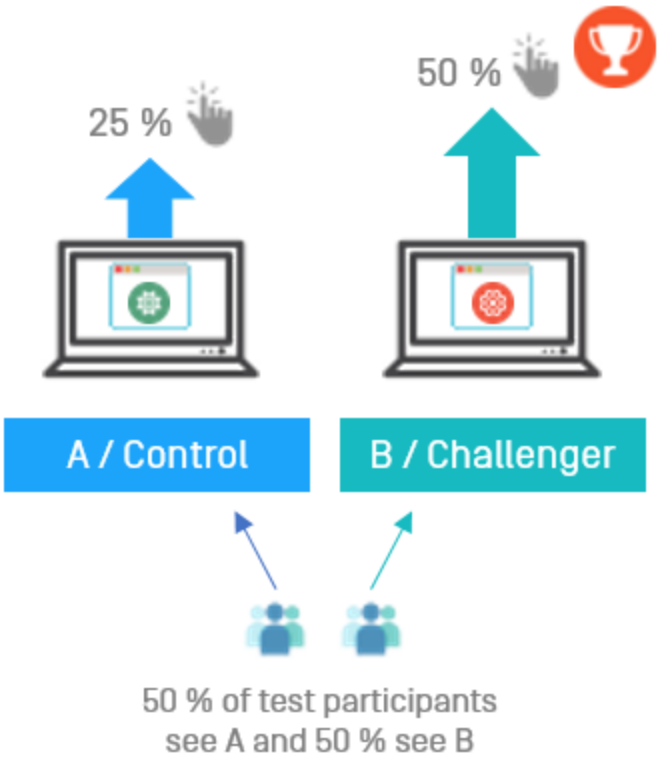

Statistical significance

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. Typ-

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ically, 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:

   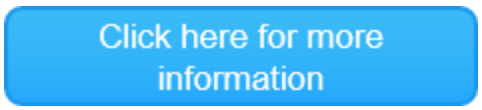

   Image on version B / Challenger:

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.

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

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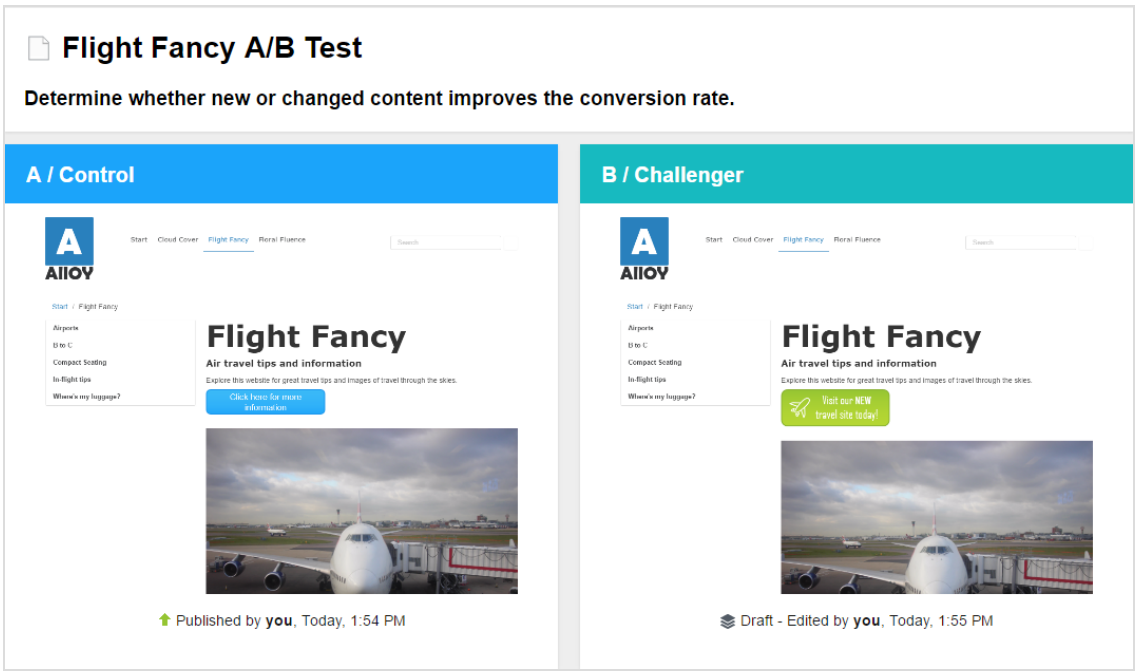

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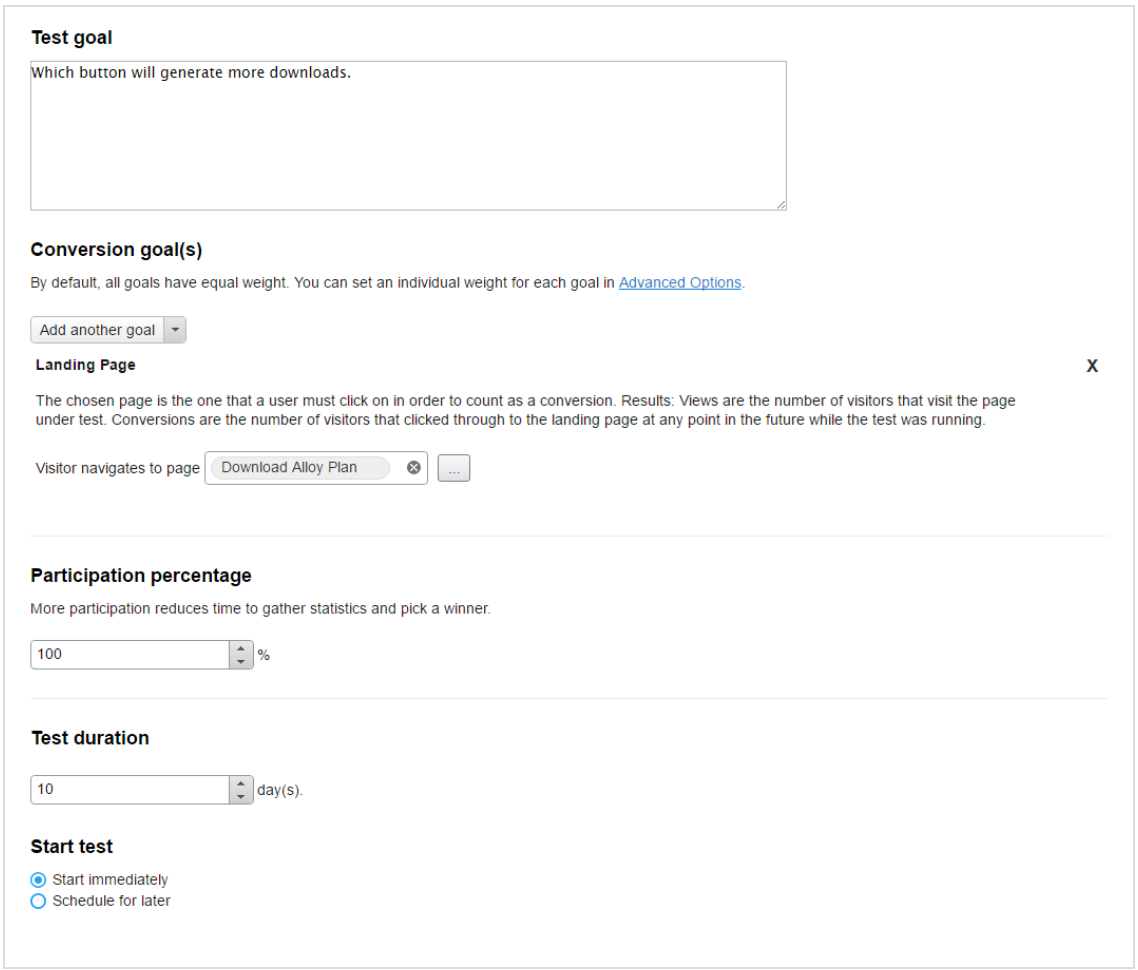

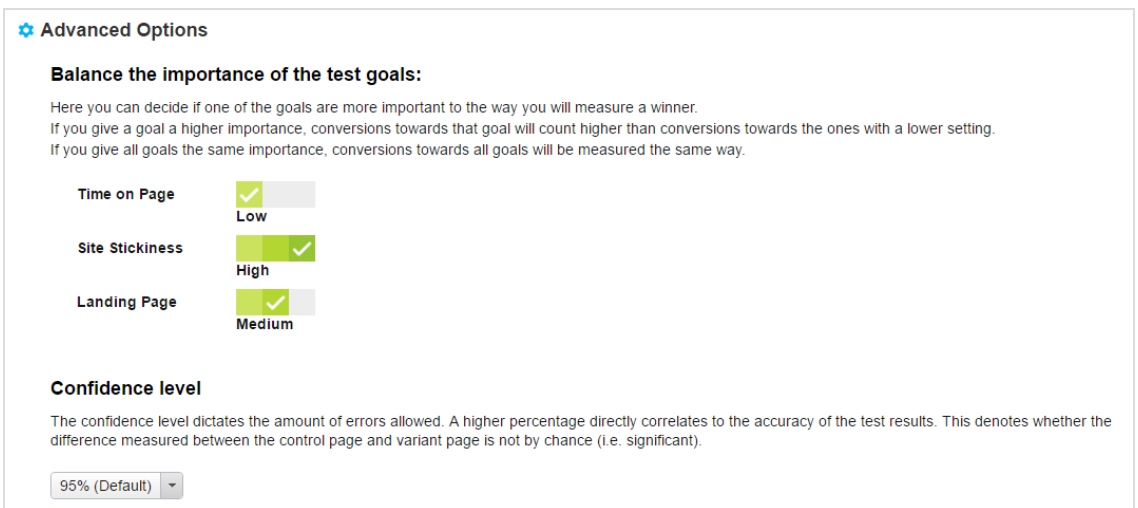

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4. Configure your A/B test by setting the following options:

Option	Description
Test Goal	Enter your hypothesis for the test. This is for your information only.
Conversion goal(s)	Select the conversion goal or goals that you want to measure. (Conversion goals are also known as key performance indicators KPIs[1].) 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. • **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 Commerce carts created by visitors included in the A/B test. The test determines which page variant creates the highest average value for all those carts when picking a winner. If a visitor creates multiple carts, all the (purchased) carts are included in the total, which means that the visitor can "convert" many times in the test duration. On Commerce websites using different currencies, the test converts all carts to the same currency. • **Purchase Product**. Select a product a site visitor can buy. If a visitor buys that product, it is counted as a conversion. **Note:** You need Episerver Commerce to use Commerce-related conversion goals such as **Add to Cart**, **Purchase Product**, and **Average Order**.

[1] Stands 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.

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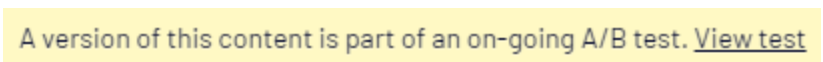
Option	Description
Participation percentage	Enter the percentage of total amount of traffic to your A/B test. If you set it at 100%, all website visitors participate in the test. Half of the test participants will see version A, and half of them will see version B. However, you may not want so many visitors 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.
Test duration	Specify the number of days you want the test to run.
Start test	Select one of the options. You can stop the test at any time before the number of specified days are done. • **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	• **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 significance 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.

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.



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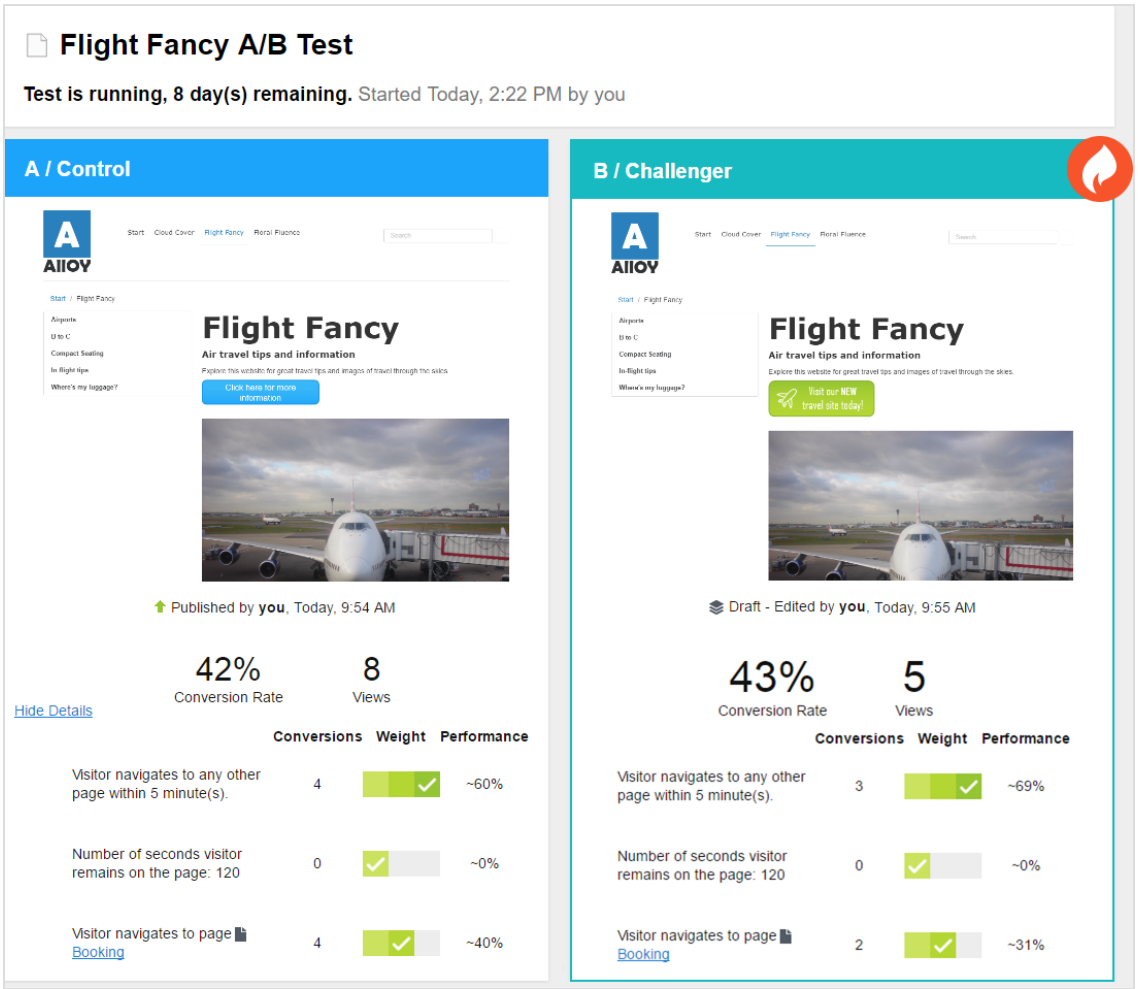
The test results are displayed, and a flame graphic shows which version is leading: .



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 block has been requested by Episerver CMS. If you have a condition set on your block so it is only displayed to certain visitor

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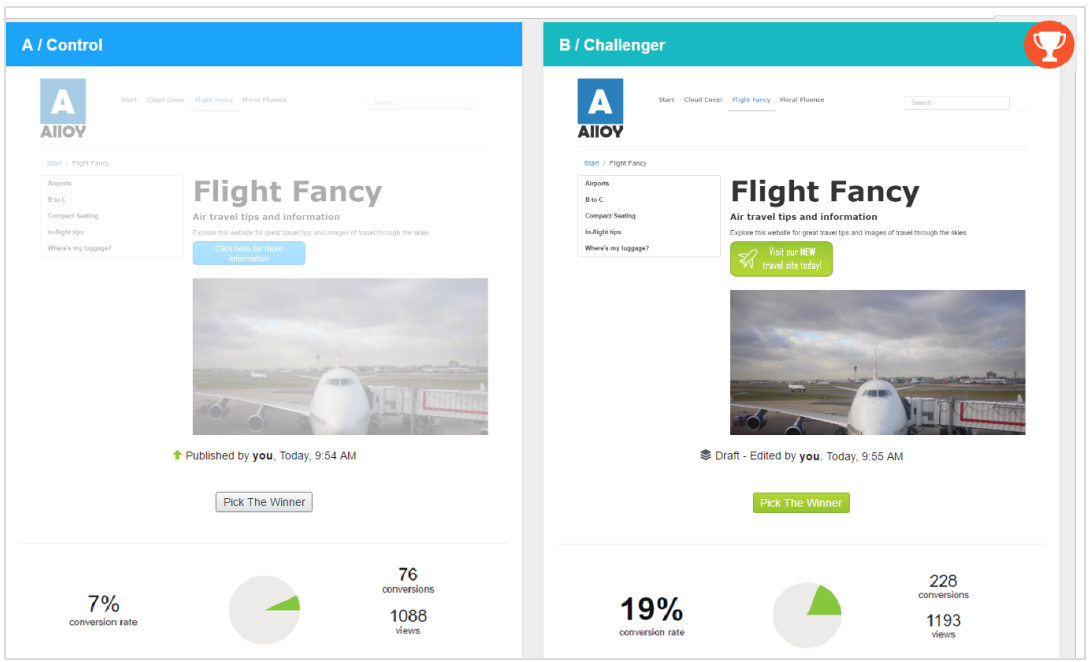
groups, for example, a view may be counted even though the block has not been displayed to a visitor.

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 runaway winner such that another few days of testing may not significantly affect the result.

     If you select **Pick The Winner**, the Pick the Winner 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.

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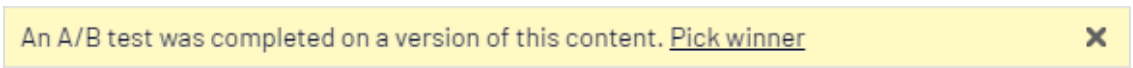
Publishing a test winner automatically

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.

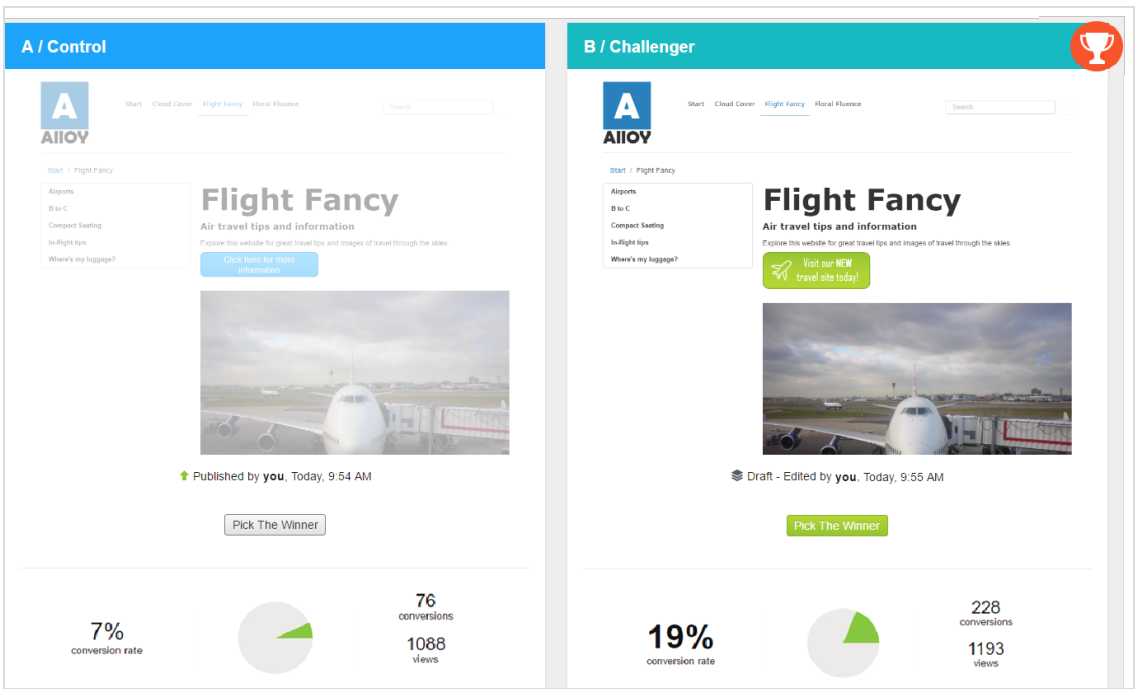
Publishing a test winner manually

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.

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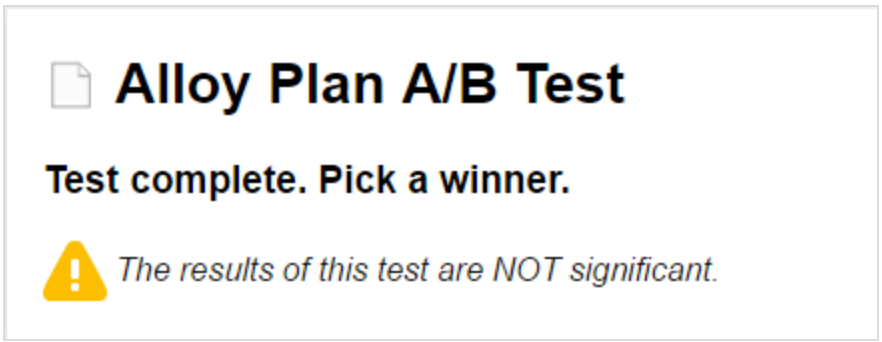

The test winner is highlighted with a green background and a trophy graphic: . The **Pick The Winner** button of the test winner is green, but you can publish either version.

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.

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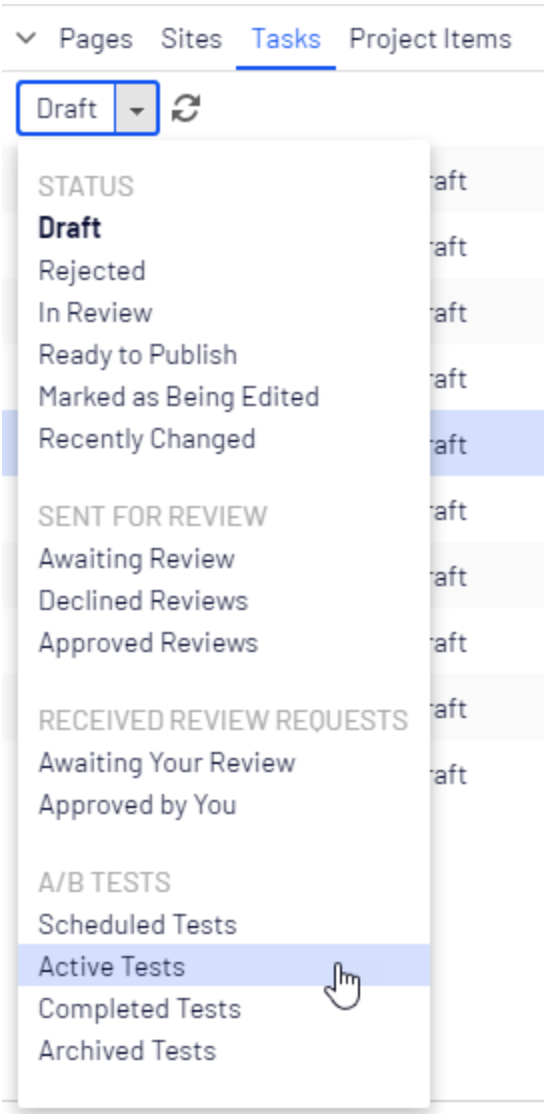

Scheduled Tests. Displays links to tests that are scheduled to run at a later time.

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 on a test in the gadget to view the test details. See Managing gadgets about how to add and remove gadgets to the edit view.

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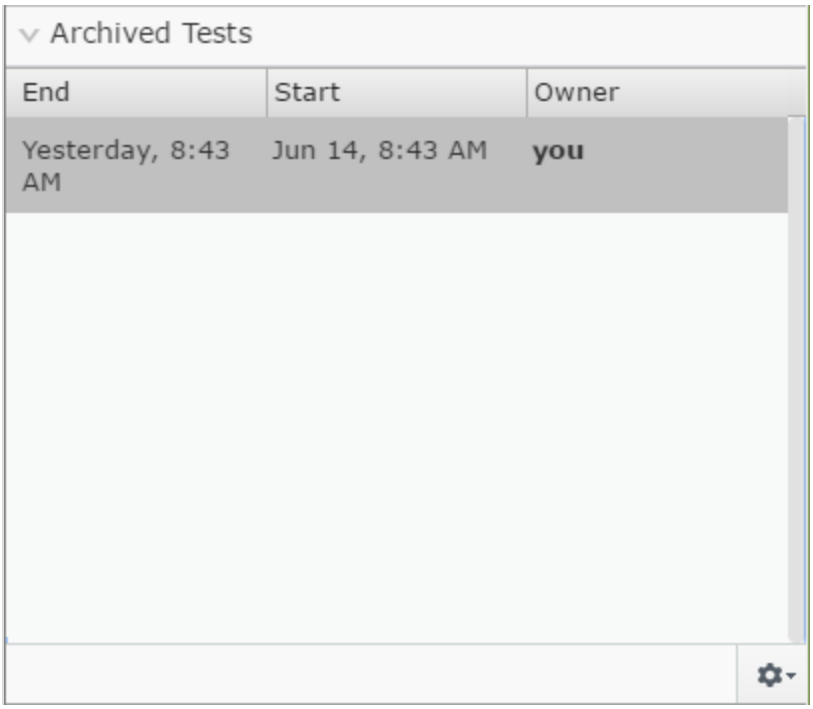

Setting default values for A/B testing

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

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Controlling the publishing process

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

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

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

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

- **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 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.

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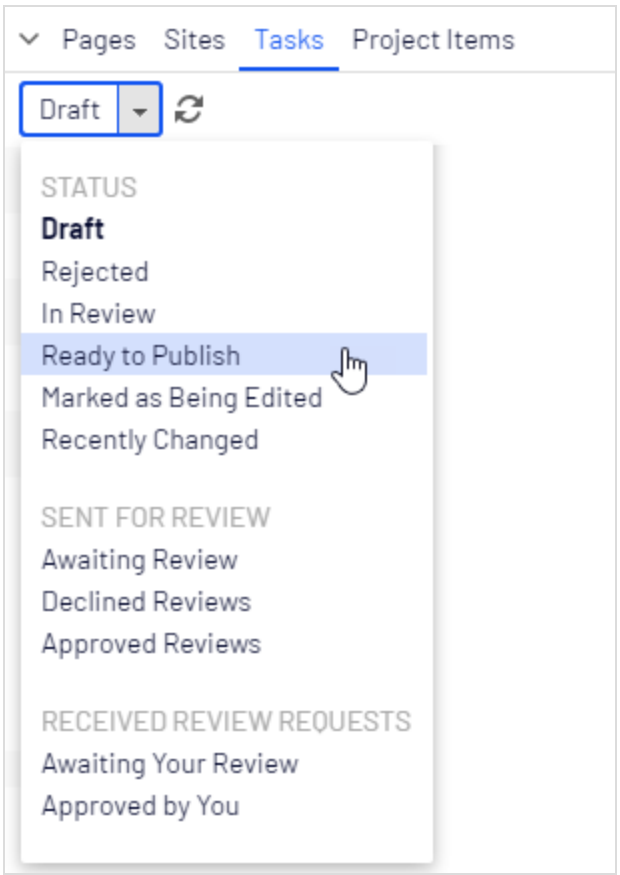

You can use the following options for monitoring content creation and content approvals:

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.

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

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

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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.

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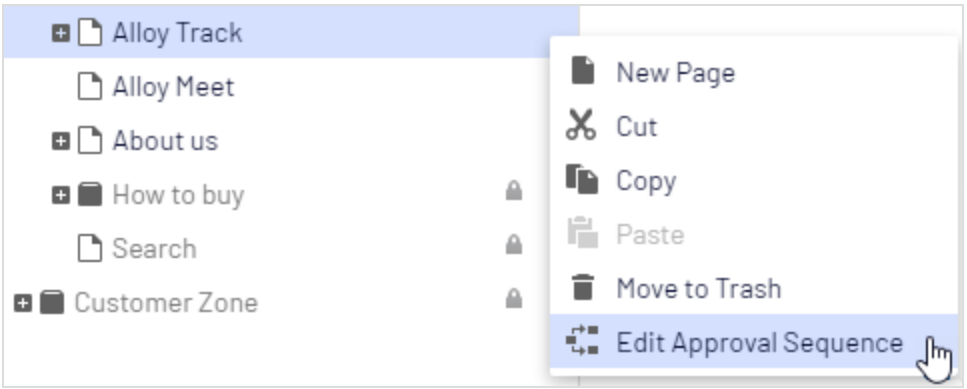
As soon as one of the reviewers in a step approves the content, that step is considered completed and the item moves to the next step in the approval sequence. When a content item enters an approval step, the reviewers in that step are notified by email and in the user interface that they have an item to approve. The editor who started the approval sequence is notified when the last reviewer approves the content item and it is set as **Ready to Publish**, or if an reviewer rejects the content item. When the content 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 Episerver can have its own content approval sequence. Assets, such as blocks and media (and also forms and catalogs if you have Episerver Forms and Episerver Commerce respectively installed), cannot have individual approval sequences. Instead, the content approval sequence is set on each assets folder, and all assets in a folder have the same approval sequence set. *Global* and *site-specific assets folders* can 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.

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- 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 the two images *Party_teaser_EN.png* and *Party_teaser_DE.png* for an English and a German version, and Julia is an 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, even if the auto publish option is set (see Auto publish media on upload in the CMS Administrator User Guide).

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.

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

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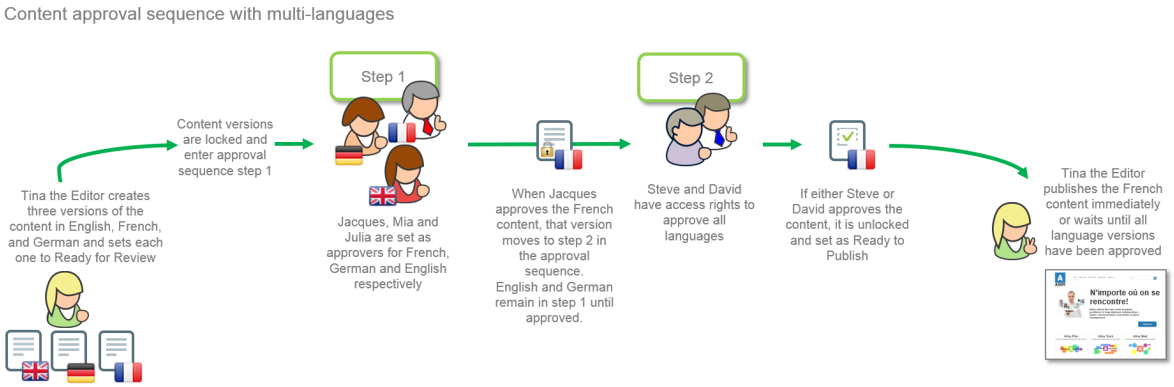
Each language version can be set as **Ready for Review** and approved separately from the other language version. This means that the German version of an item can be approved in three approval steps and published before the French version has even passed approval step 1. See Translating content to work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

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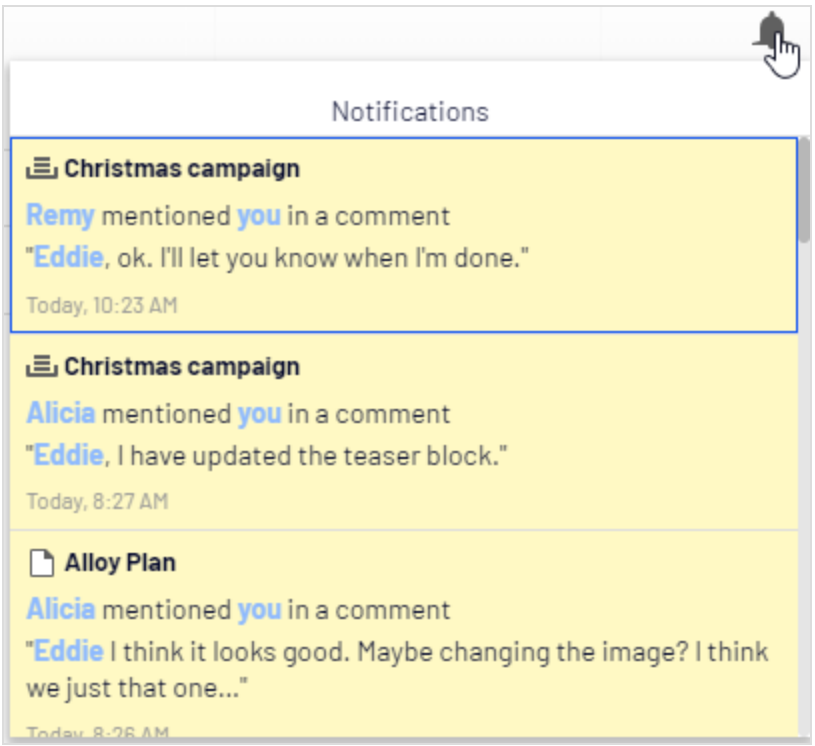

If your system is configured to use email notifications, you will also receive an email; how often these notifications are sent depends on the system configuration.

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 *approved* 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 in the step).

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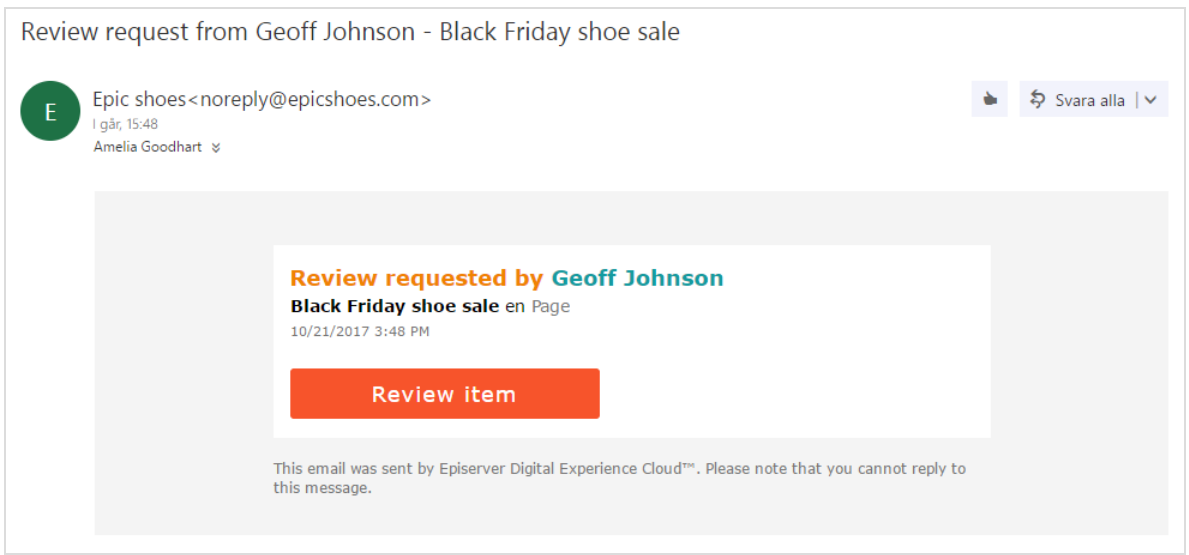
Notifications are sent when:	To:	Notification message:
all steps were *approved* and the item is set as **Ready to Publish**.	to the user who started the content approval sequence.	"The reviewed content has been approved and is now ready to publish."
a content approval step was *declined*.	to the user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



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.

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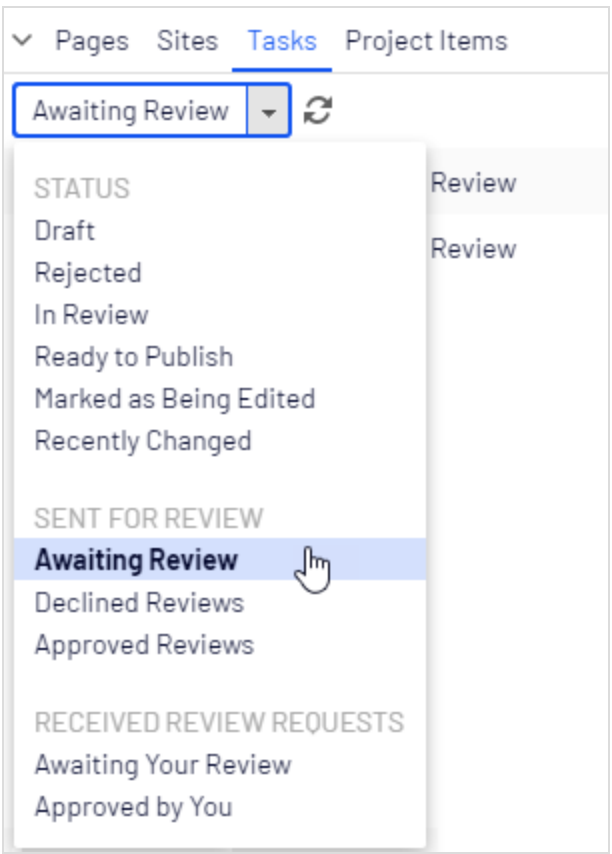
Tasks

> **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 status **In Review**.

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Option	Description
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 predefined approval sequence, one of the company's chief editors Alicia and Carlos, must review and approve the page. Alicia and Carlos are notified with an email and also when they log in to Episerver CMS that they have a page to approve.

When 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.

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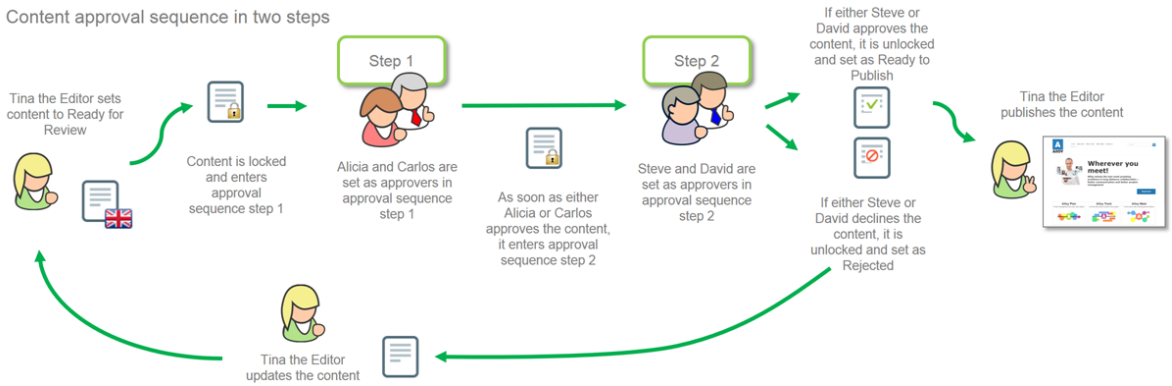
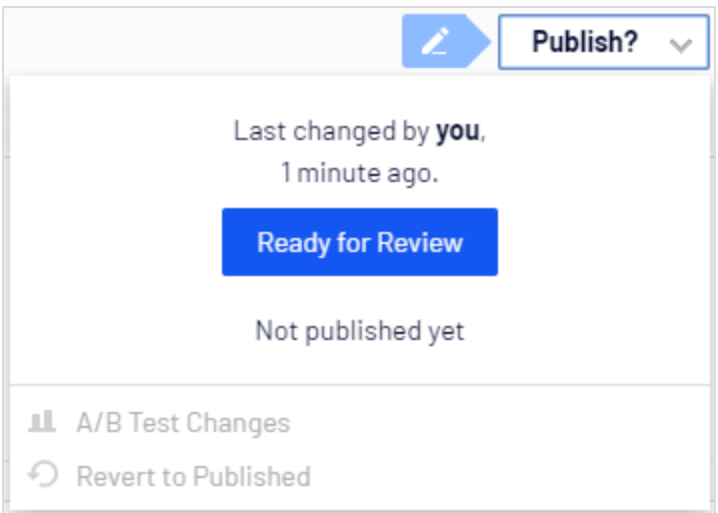
If Steve or David declines the approval, the content is set as **Rejected** and Tina must update it and set it to **Ready for Review** again. Alicia or Carlos will then have to approve the second draft as well.



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

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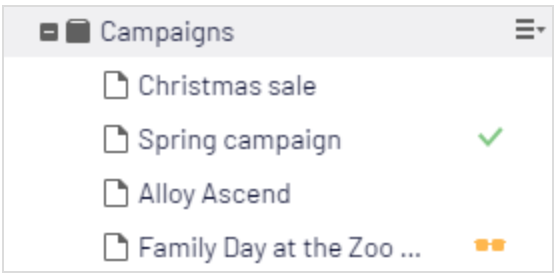
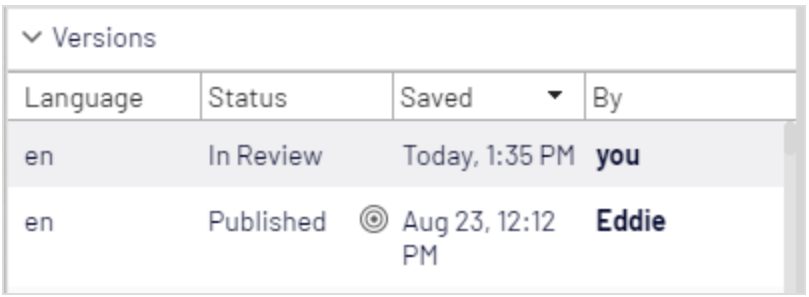


Image: Versions gadget shows **In review** status



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 on 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.

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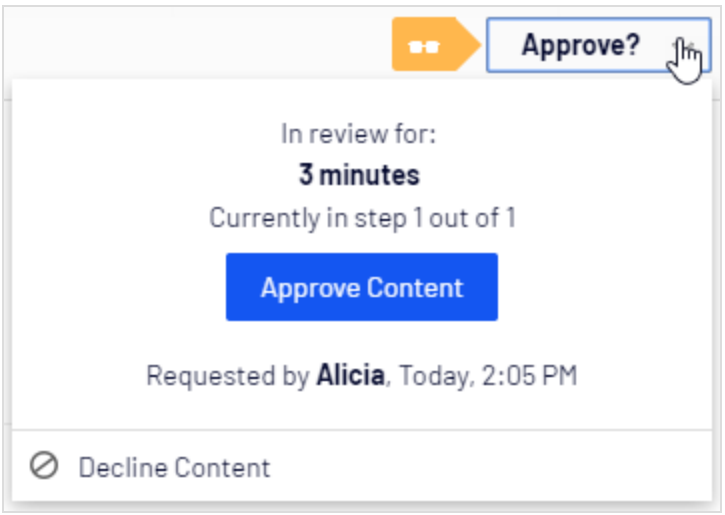
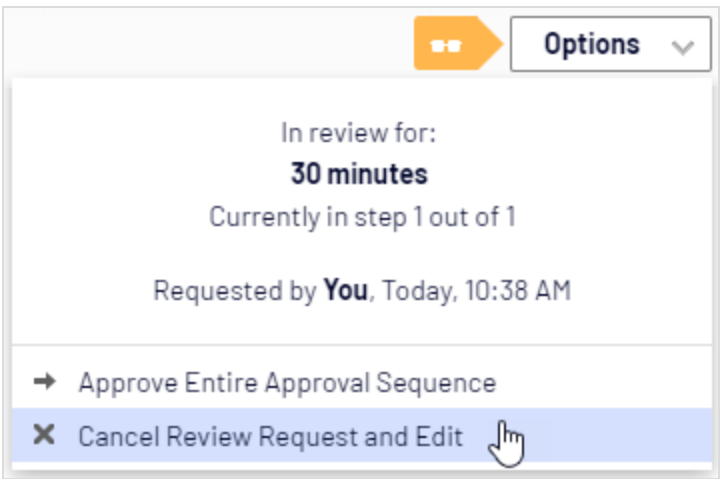


> **Tip:** If you have multiple review requests to go through, you can use the Tasks pane to see which items you should review and to navigate between them, and the compare feature to see where changes have been made.

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.



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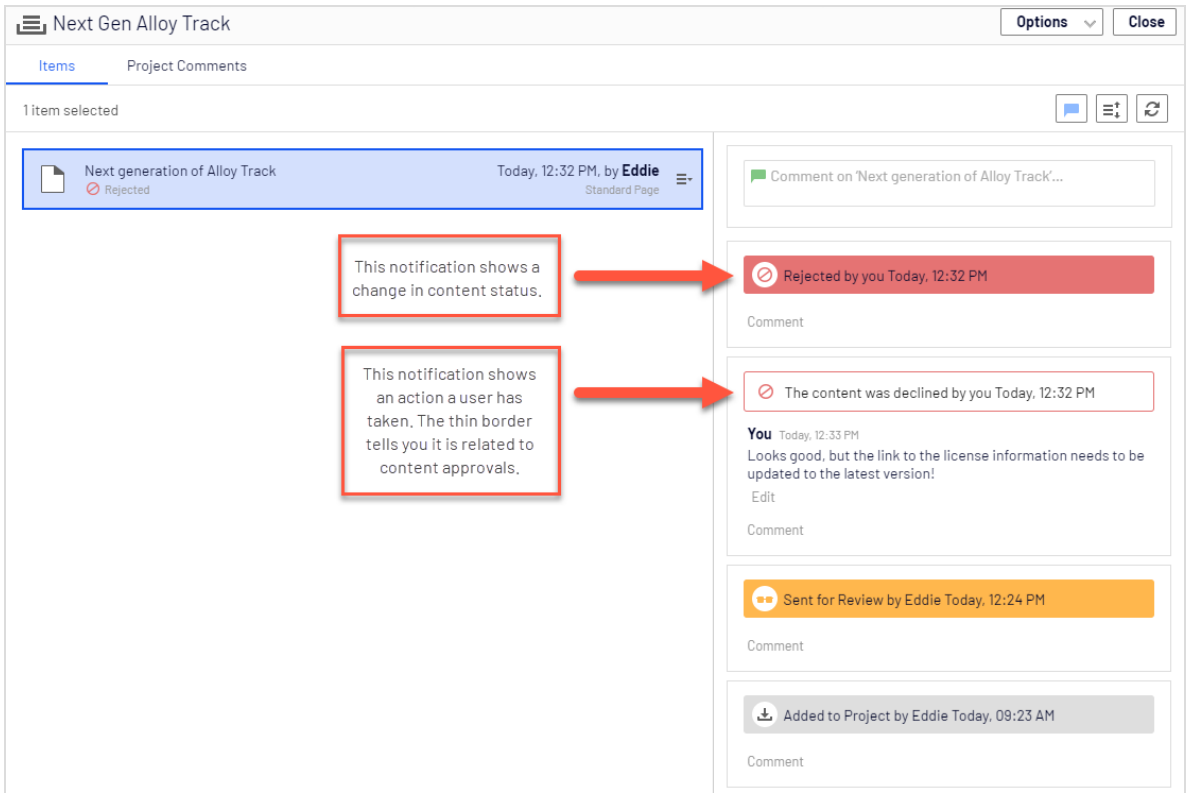
Commenting when approving and declining content

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 (Add-on)

Note: The Episerver Change approvals add-on requires a separate installation. It is not included in an Episerver installation by default. Change approvals requires no additional license. See Episerver World for installation details.

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Change approvals is an add-on to Episerver 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.

You can watch the following demonstration video describing 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.

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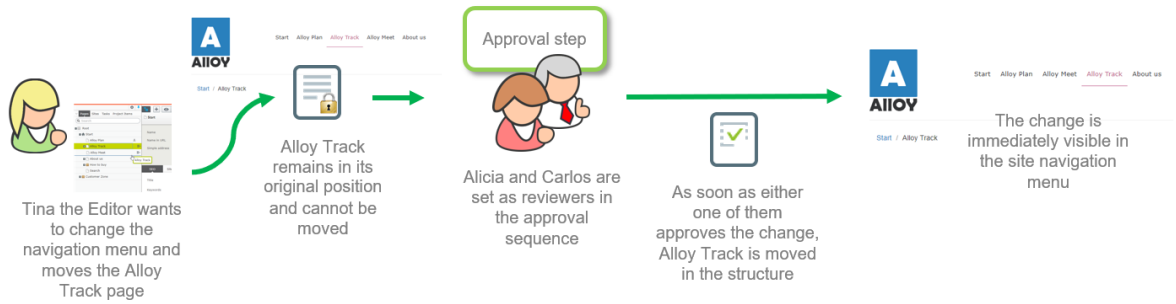
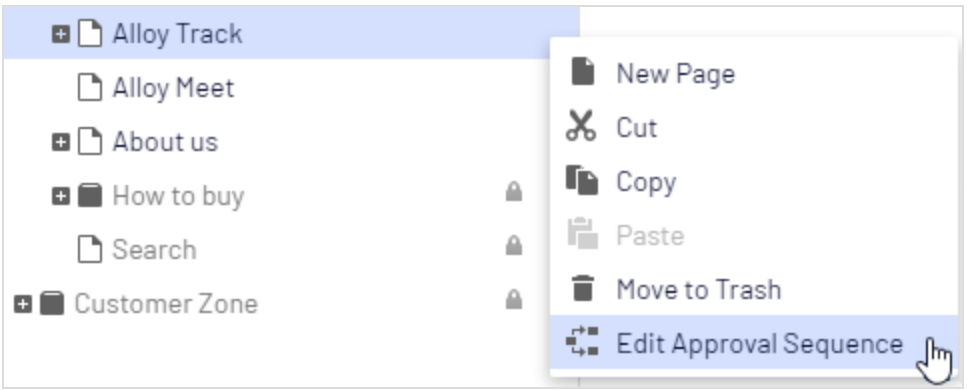


Setting up an approval sequence

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

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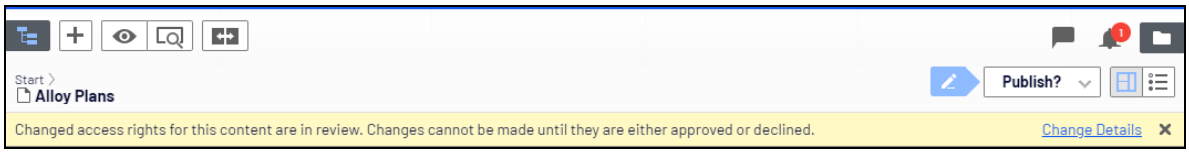
changing the setting, you will see a notification message: *Your changes have been saved and sent for approval. The changes will come into effect once they have been approved.* There is also a notification bar in the content item to inform you that a change is in review.



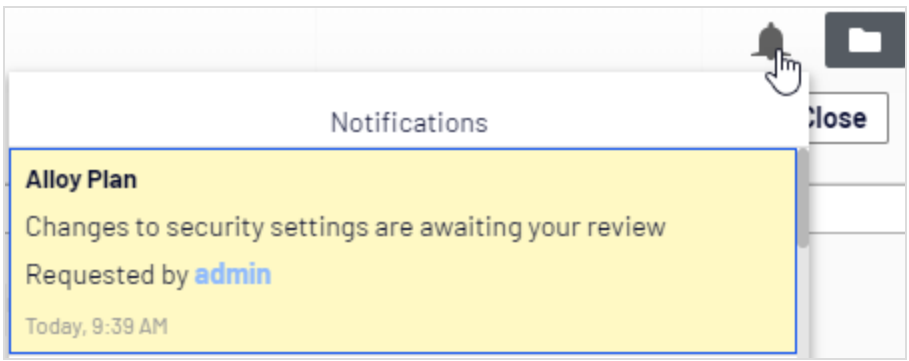
Once a change has been made and it is in review, you can no longer move the item or edit a setting that requires approval until the review request has been approved, declined, or canceled. You can cancel the review, and thereby revert your change, by selecting **Cancel review request** from the **Options** 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 Episerver CMS user interface, you will see a notification if you have a change to approve:



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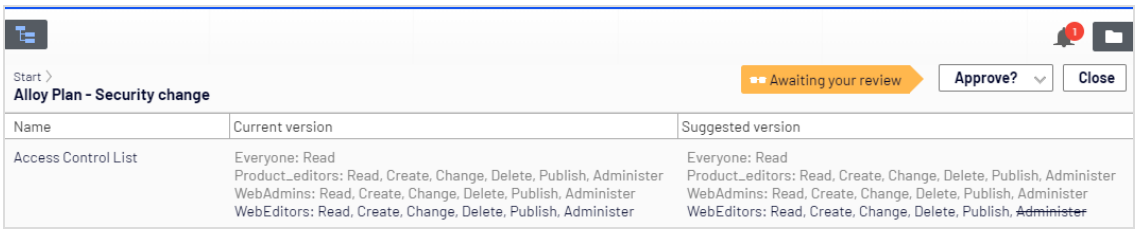
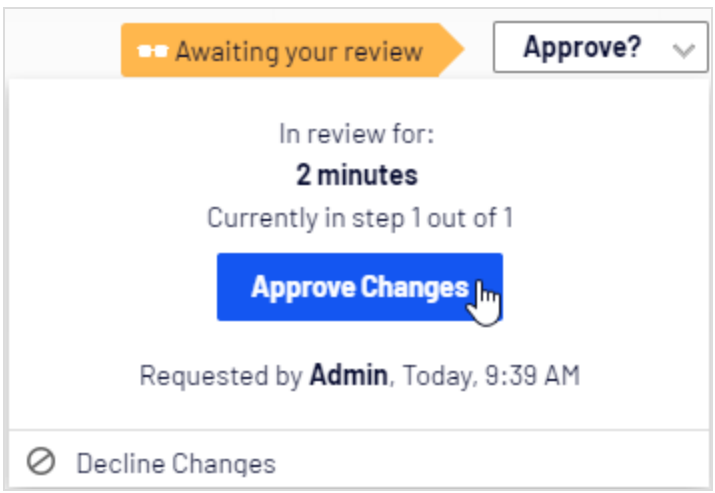
2. Click on this notification to see the change detail overview:



   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 on 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.

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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 Commerce installed) to a project and publish them, manually or scheduled, at the same time. Projects support management of content in different language versions, so you can manage translation of content items in projects.

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

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

The following table shows a comparison of the two methods:

Projects gadget	Projects feature
Accessible to users who add the gadget.	Accessible only if it is enabled for the entire site.
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 publish**	You can publish multiple items that are set to **Ready to publish**

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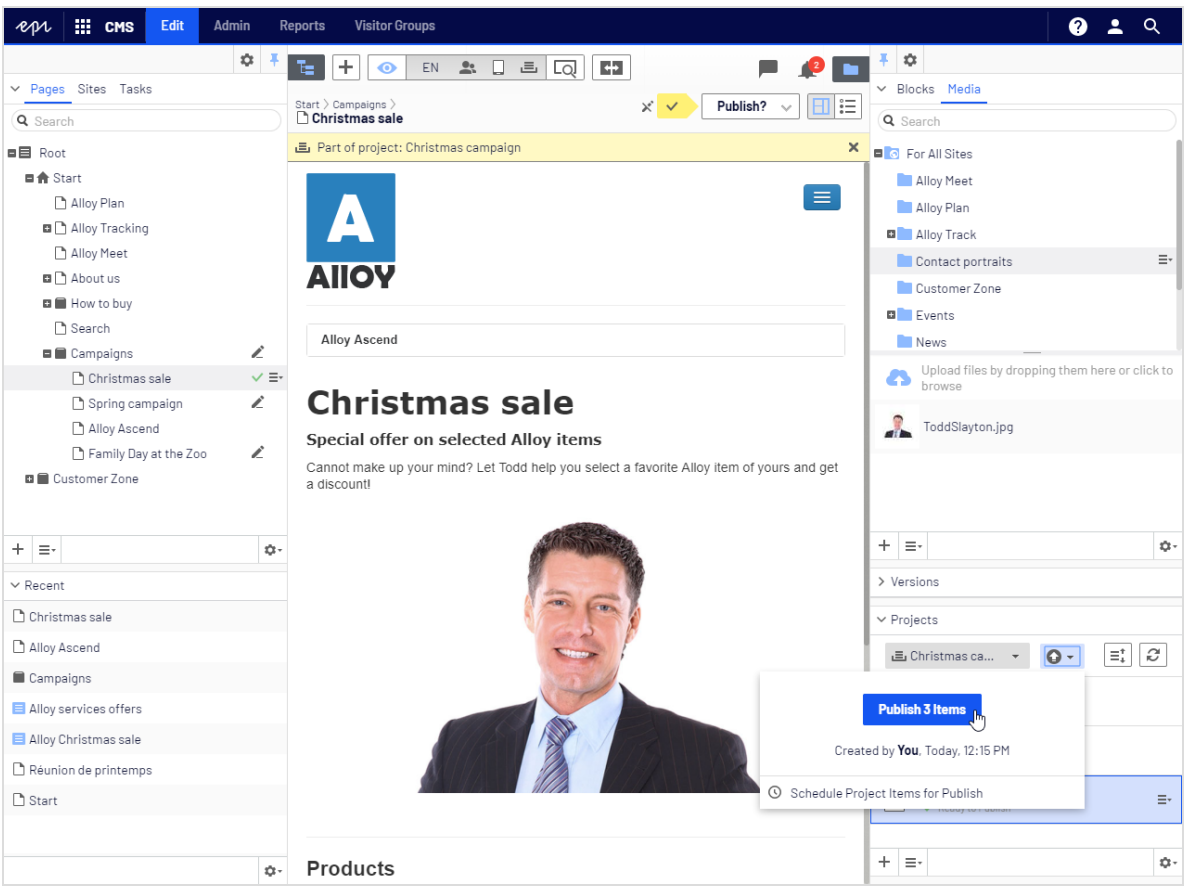
Projects gadget	Projects feature
before the project is published.	and leave items that are not ready for a later time.
There are no collaboration features.	You can collaborate on projects by adding comments to projects and items.

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 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.



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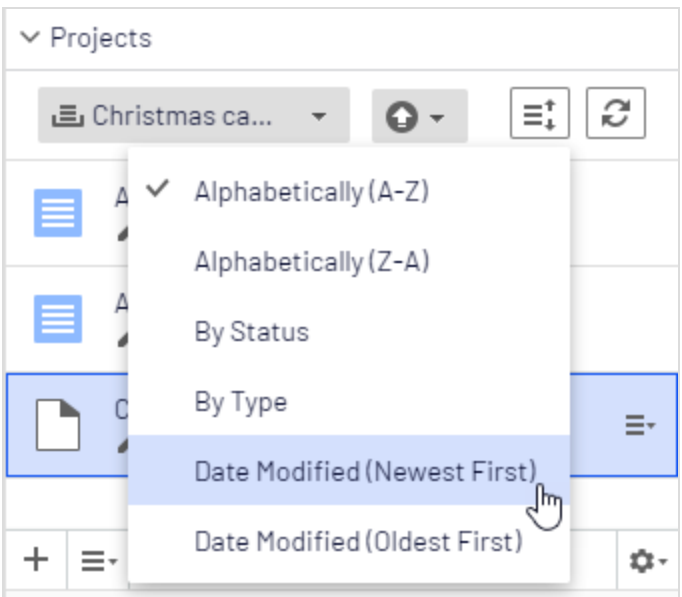
You can create new content or create draft versions of existing content, associate the content items with a project, and then publish the project immediately or schedule it for later publishing.

> **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.



> **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.

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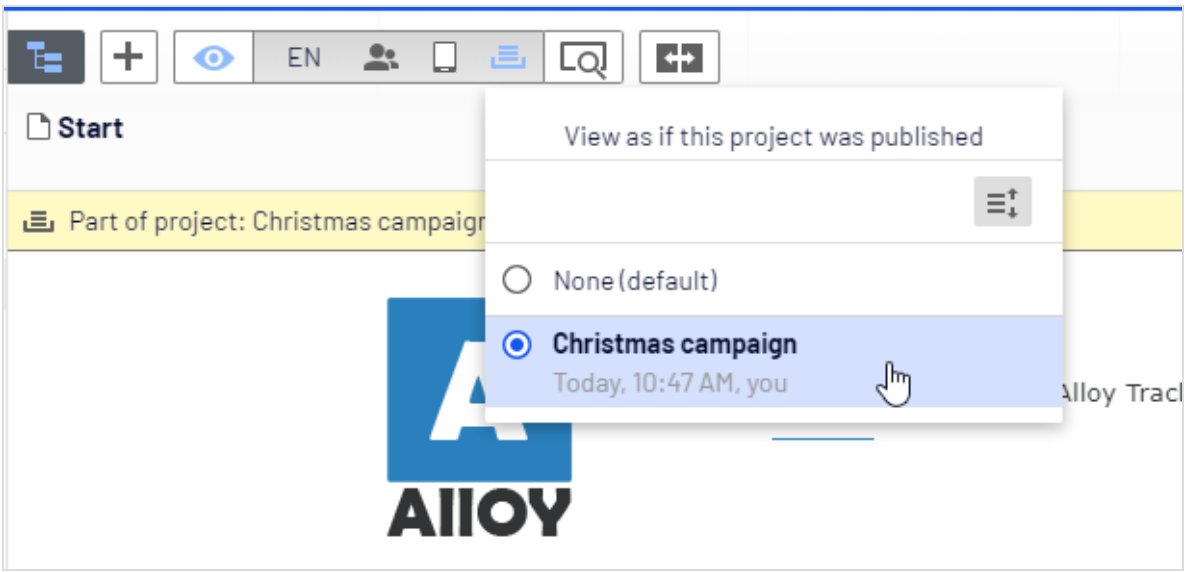
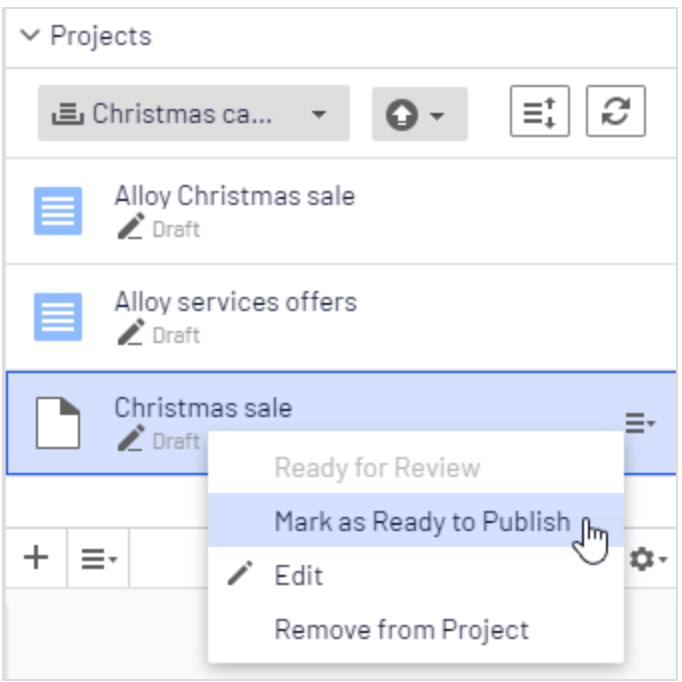


Publishing projects

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.



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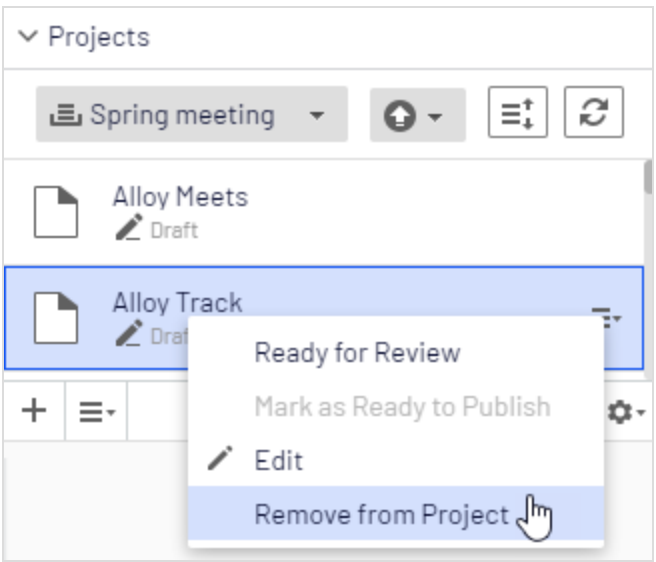
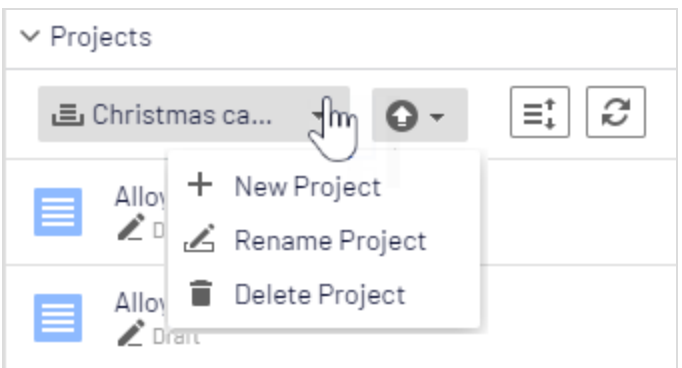
When all items are ready for publishing, you can publish the entire project directly, or schedule the project to be published later (if you have publishing access rights). If you need to change content in a scheduled project, select **Remove Scheduling and Edit**, change the content and re-schedule the 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

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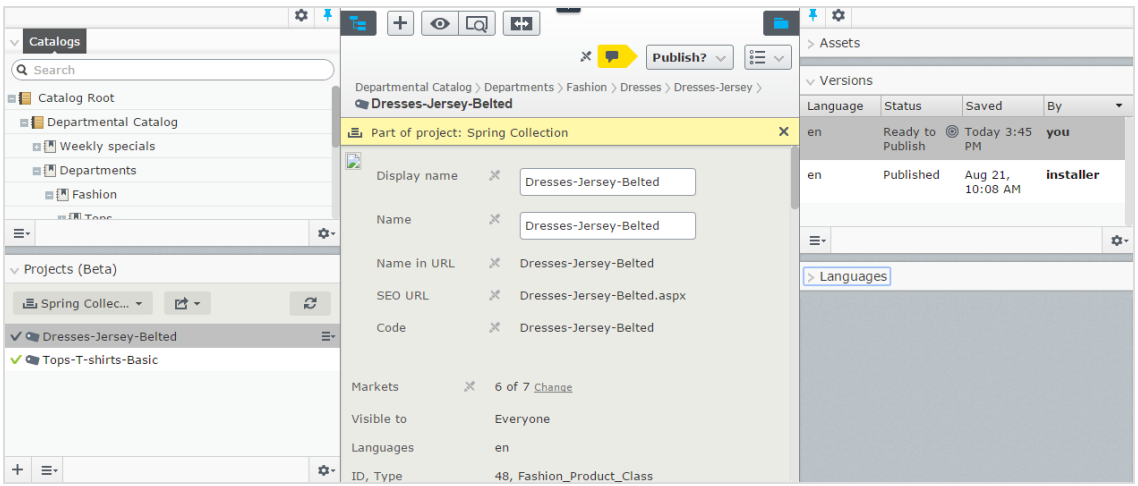
This example creates a fashion sales campaign with multiple content items on a website with Episerver CMS and Commerce. The campaign will go live on a specified date, and contain a landing page with a product listing block, two new products to be listed in the block, and a teaser block for the start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

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



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

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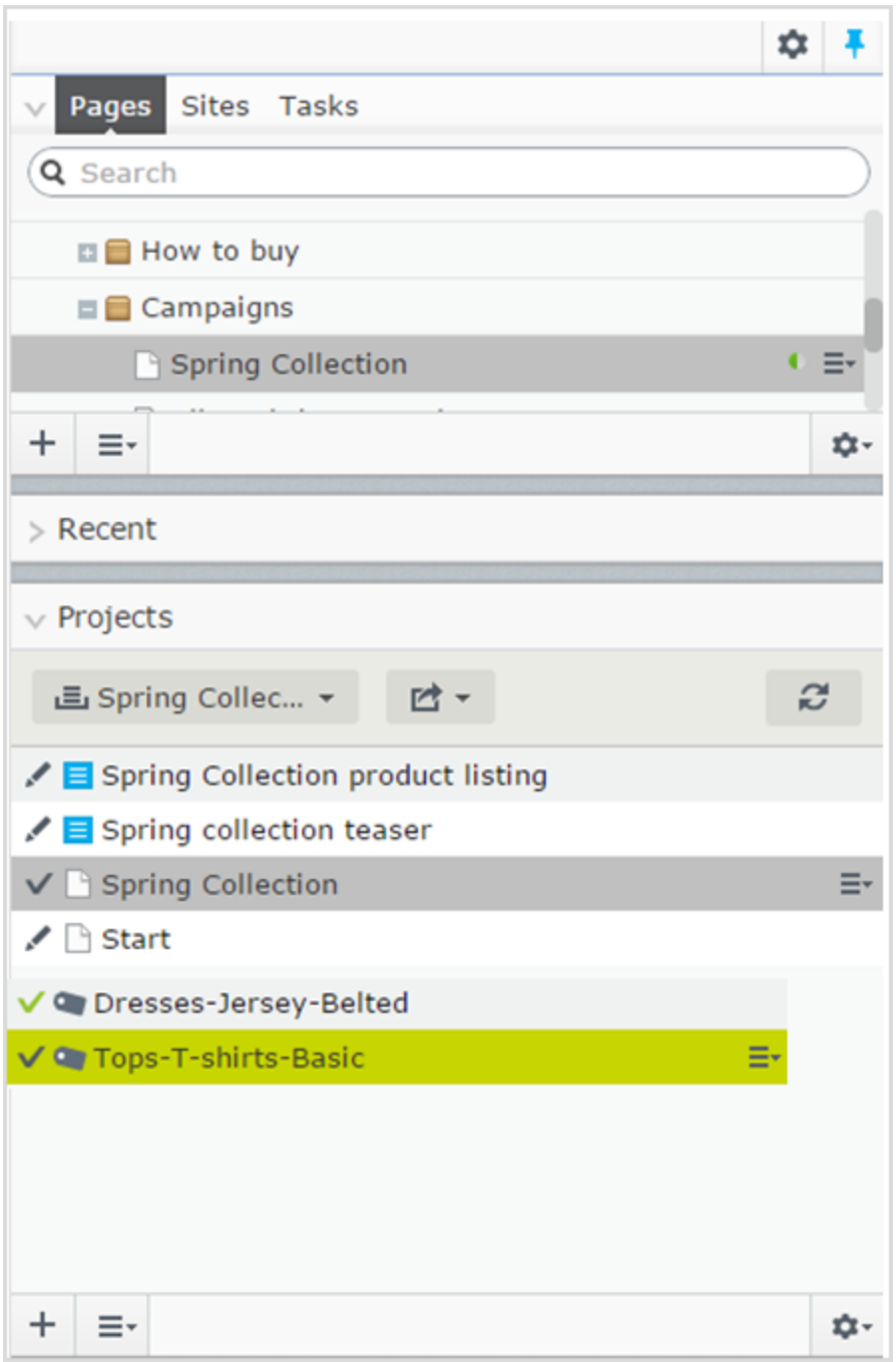
now contains all the items to be included in the campaign.



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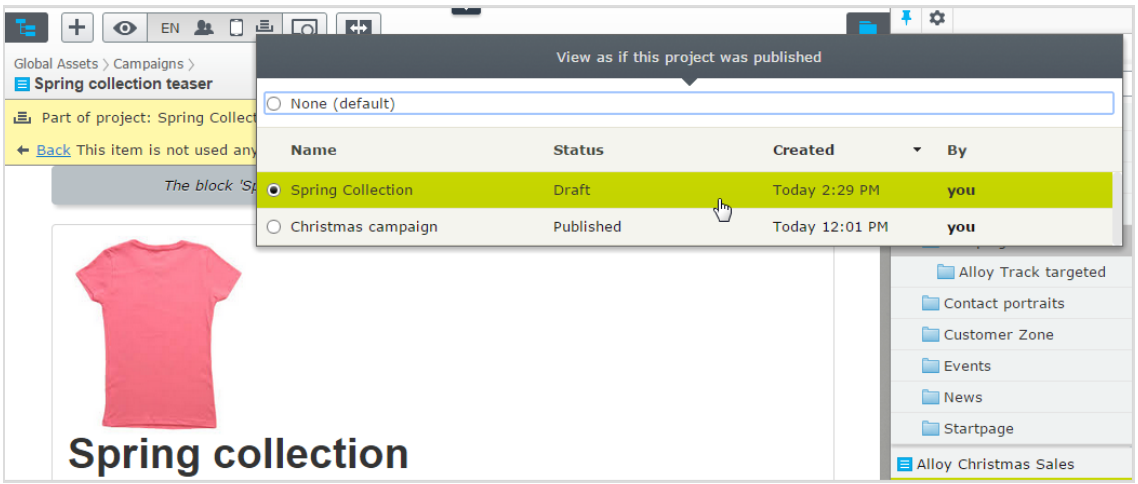
8. Preview the content items in the project, edit as needed and set to **Ready to Publish** when done.



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.
7. Repeat the previous actions for the German language version. You now have six content items in the pro-

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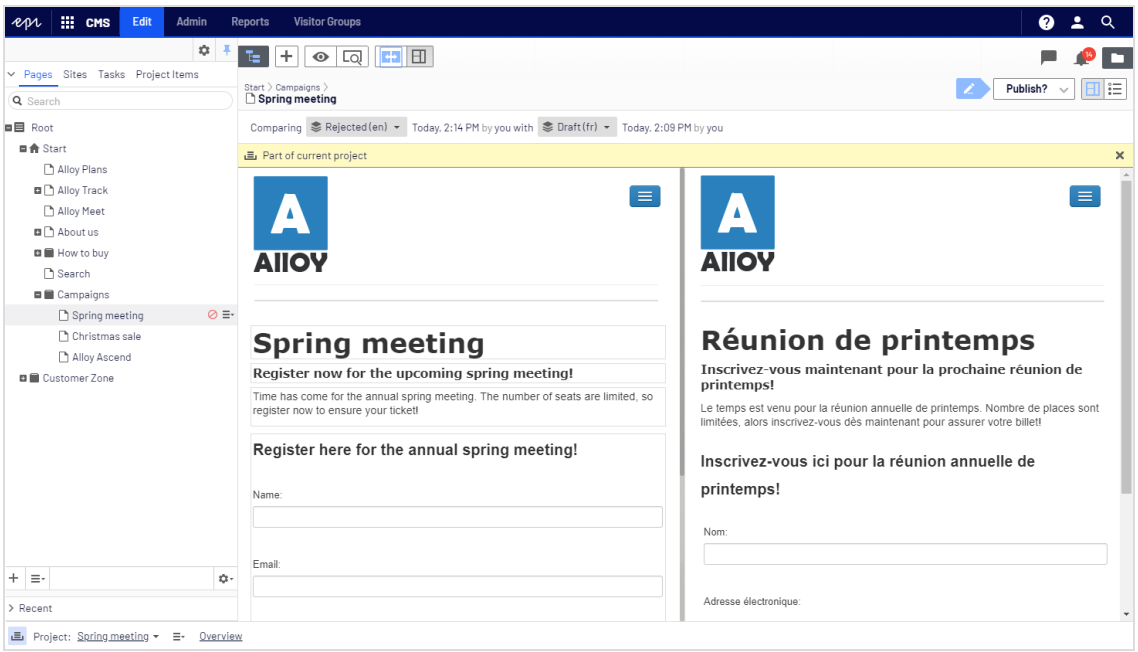
ject; two for each language version.



8. Translate the content items into French and German respectively.
   - Use compare to display the original English version when translating.
   - Use preview to verify the different language versions of the content.
9. Set all the content items to **Ready to Publish** when done, and 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 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.

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

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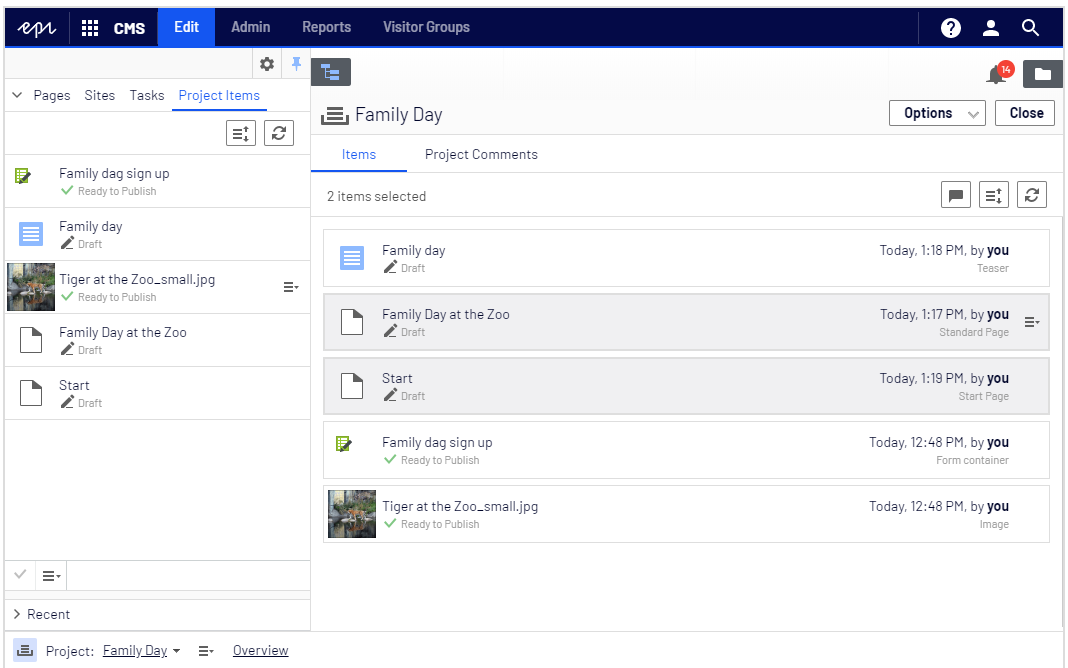
Project features:

- 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.



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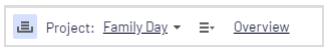
Projects user interface

Project bar

When a developer enables the projects feature, a project bar appears at the bottom of the CMS window.

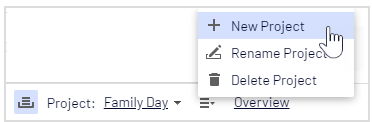


When you first access the edit view with the projects feature enabled, no project is selected in the project bar. When you select a project, it is preselected the next time you open the user interface.

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

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

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



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

Project overview

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

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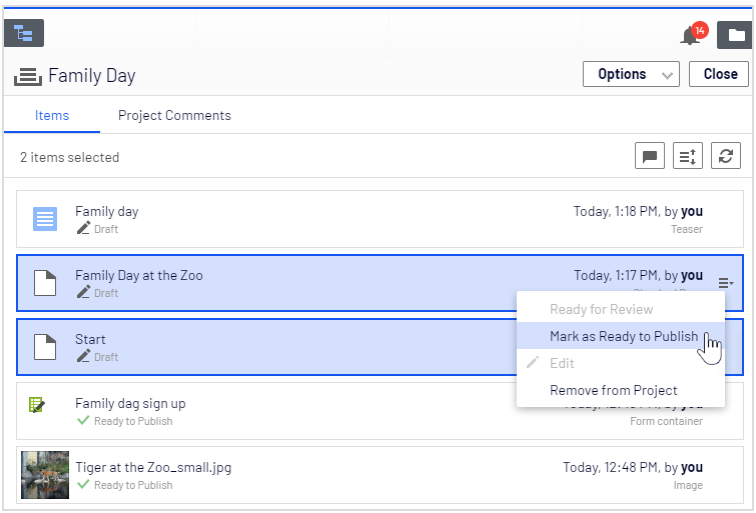

The overview shows details such as name, content status, content type, and time and date for latest change of each content item.

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 the mouse over an item.

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

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

Show comments opens a view where you can select a project item and see a list of events connected to the item. You can add comments on each event and also reply to comments, see 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 on an item to open it.

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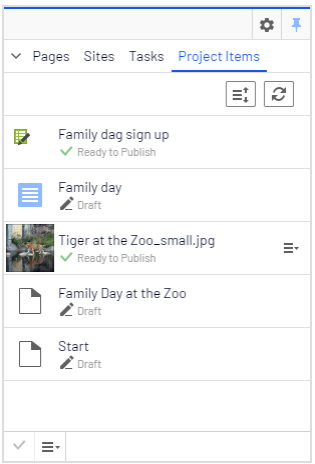

Each content item in the project items pane has a context menu displayed when you hover the mouse over an item; the menu options are the same as those in the project overview. You can select multiple items in the list the same way as in the project overview.

Versioning when working in projects

> **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.

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

When you open an item and have a project active, Episerver CMS displays the version associated with the active project. If you open an item and do not have a project active, Episerver displays the version that is set as primary. You can see which version is the primary in the versions gadget; the **primary version** is marked with a target symbol. The primary draft is not necessarily the latest version. 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.

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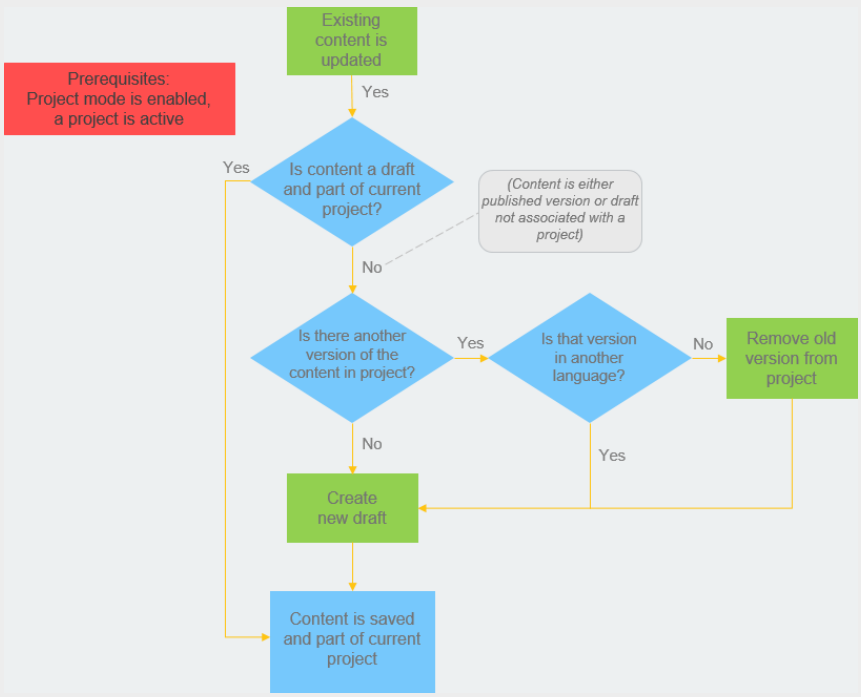
Project 'X' is selected	Result
and you update existing content:	Is the content a draft and associated with the active project? **Yes:** The draft is saved and still associated with the active project. Whichever version was the primary draft before is still the primary draft. **No, the content is a published 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. > **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 Episerver as a draft but is no longer associated with a project. A draft of the same project item but in another language is not replaced as it is viewed as another version of the item. This means that you can have one draft in English and one draft in French of page *Z* in the project *X*, but you cannot have two drafts in English of that page. 

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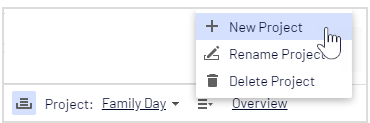
None (use primary drafts) is selected	Result
and you create new content from scratch:	The draft is created and set as primary draft.
and you update existing content:	Is the content a draft? **Note:** It does not matter if the content is associated with a project or not; versioning works the same in this case. **Yes:** The draft is updated and saved. If it was associated with a project before you edited the draft, it will still be associated with the project afterwards. Whichever version was the primary draft before is still the primary draft. **No, the content is not a draft:** A new draft is created and is not associated with a project. It is set as the primary draft. **Note:** If the updated content is a media file and auto publish is turned on, the media is automatically published at this stage.

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.

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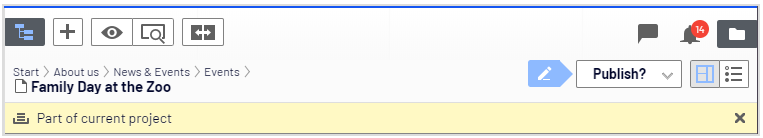
> **Note:** A specific content version can only be part of one project. If you try to add the same version to another project, you are prompted to create a new draft. If you choose to create a new draft, the new version is then added to the project.

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 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. See the **Auto publish media on upload** setting in System settings in the CMS Administrator Guide. Media associated with a project need to be published like any other content item.

Previewing project content

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

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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

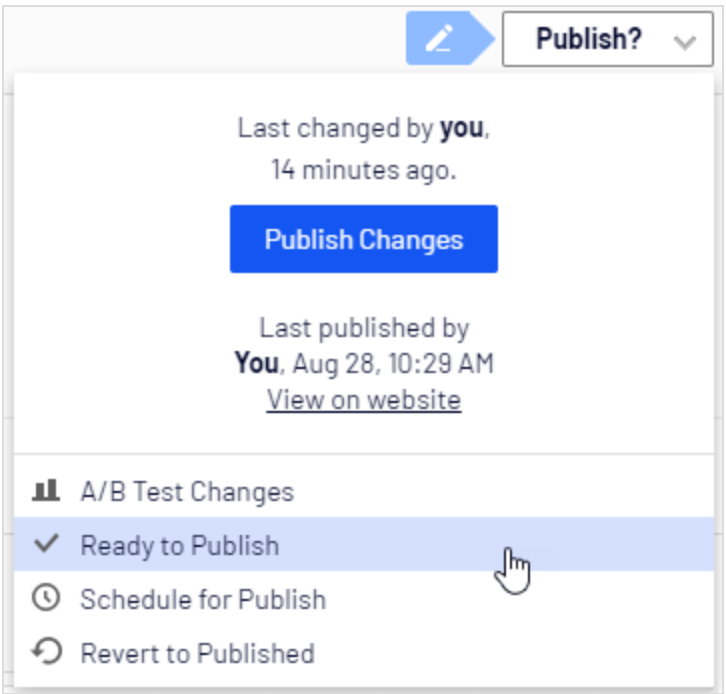

Image: Context menu, overview

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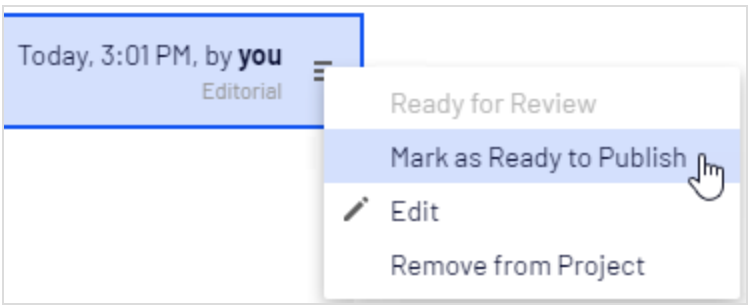
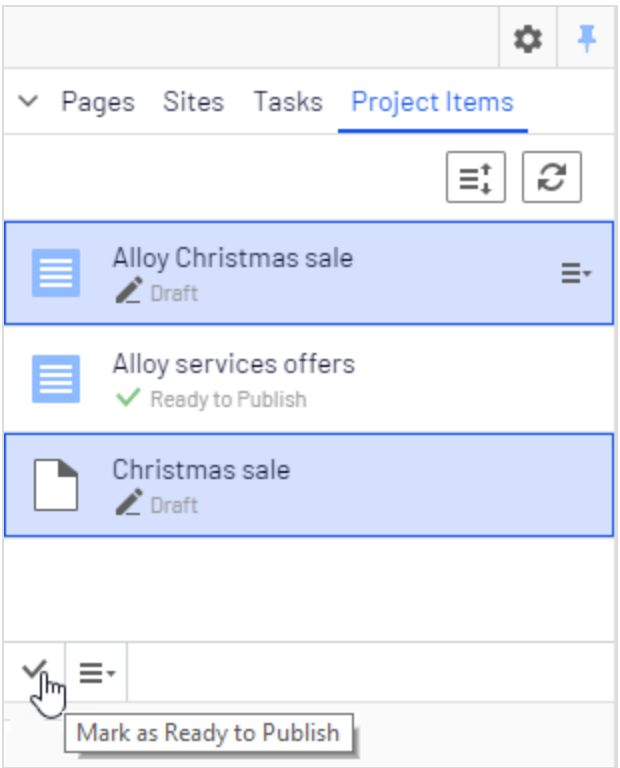


Image: Project Items tab in navigation pane



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.

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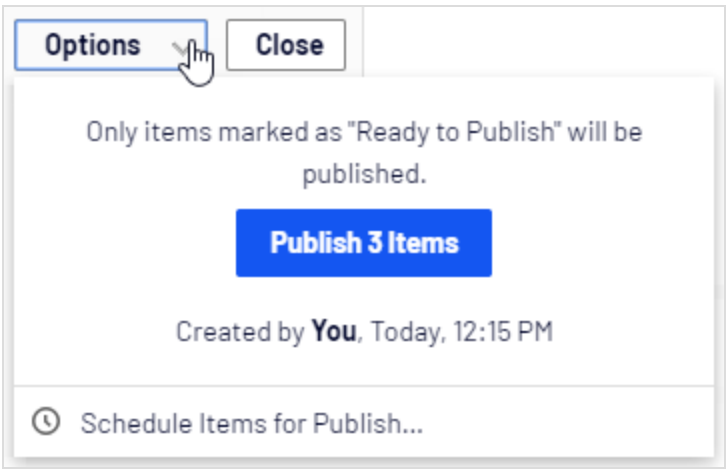


> **Note:** If the items in a project were scheduled for publishing and you add new items to the project, the new content is not scheduled for publishing automatically. You must specifically set the new content to scheduled time of publishing if you want it to be published at the same time as the other items in the project.

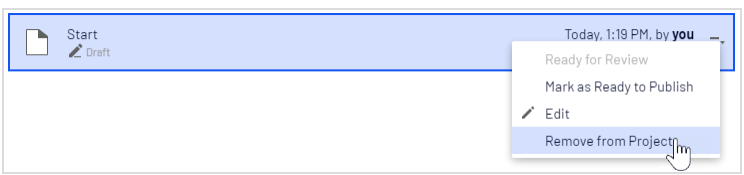
If you need to edit content that is scheduled, select **Remove Scheduling and Edit**, edit the content and reschedule.

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.

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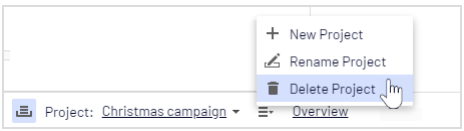
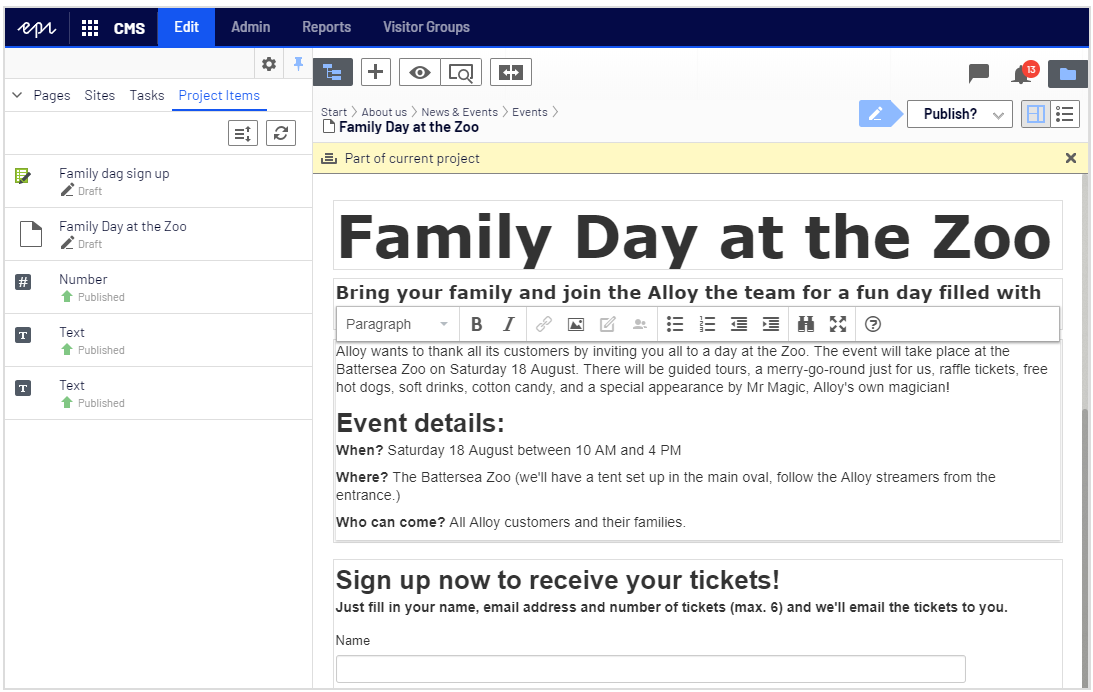


Examples of using the project functionality

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.



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

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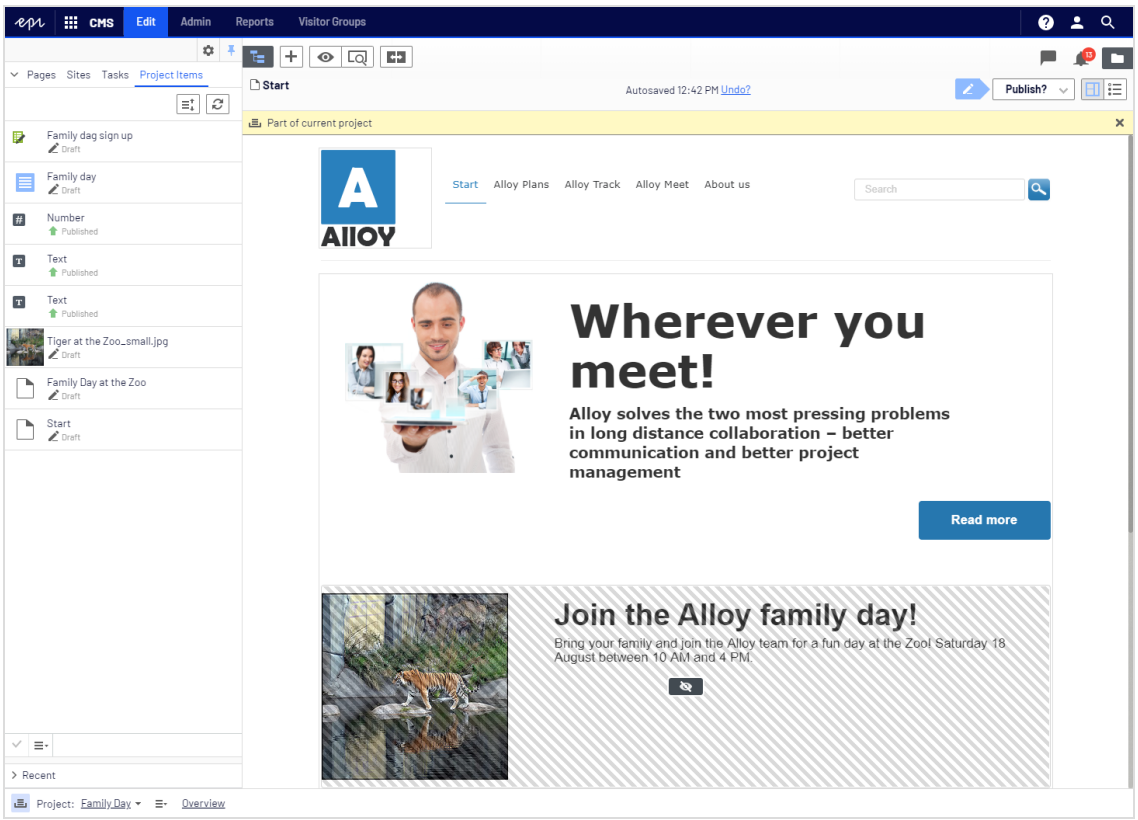
5. Create a teaser block to use on the start page for promoting the customer event and drag it to the start page. The *Customer event* project now contains all items related to the event.



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.

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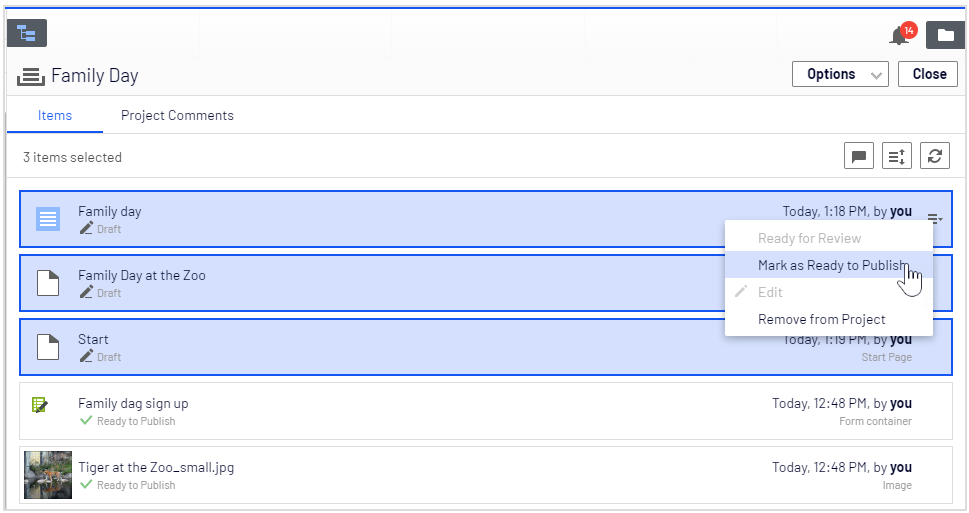
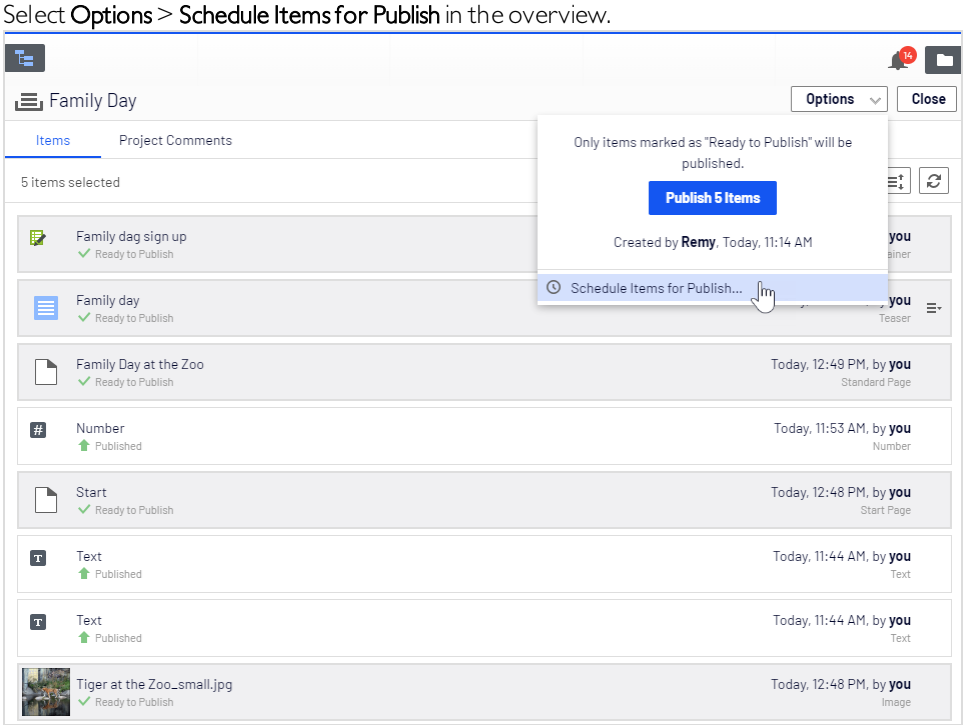


8. From the context menu of one the items, choose **Ready to publish** and all items are ready to be published.
9. Select **Options** > **Schedule Items for Publish** in the overview.



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

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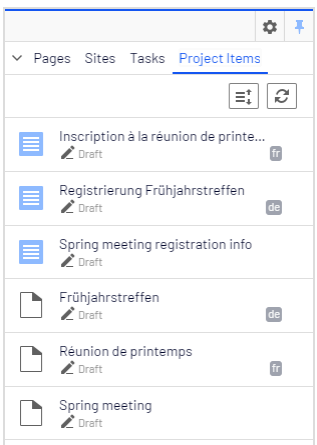
changes into the scheduled project version of the start page, you must remove the scheduling, edit the content and then re-set the scheduling.

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.

6. Translate the content items into French and German respectively. Use compare to display the original English version when translating. Use preview to verify the different language versions of the content.

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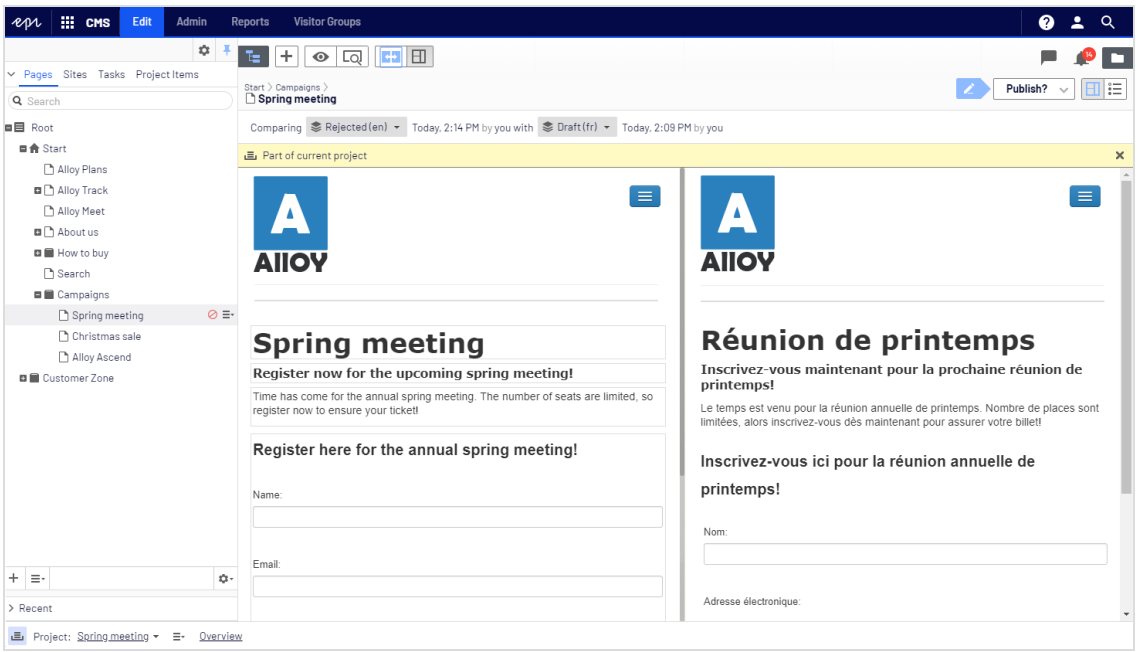
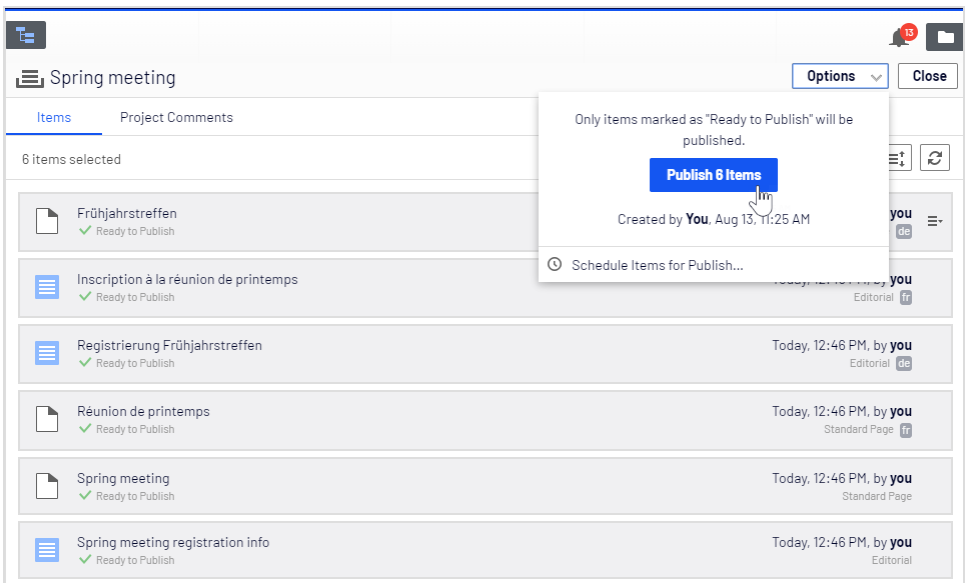


7. Set all content items to **Ready to Publish** when done, and publish the project or schedule it for later publishing from **Options** in the project overview.



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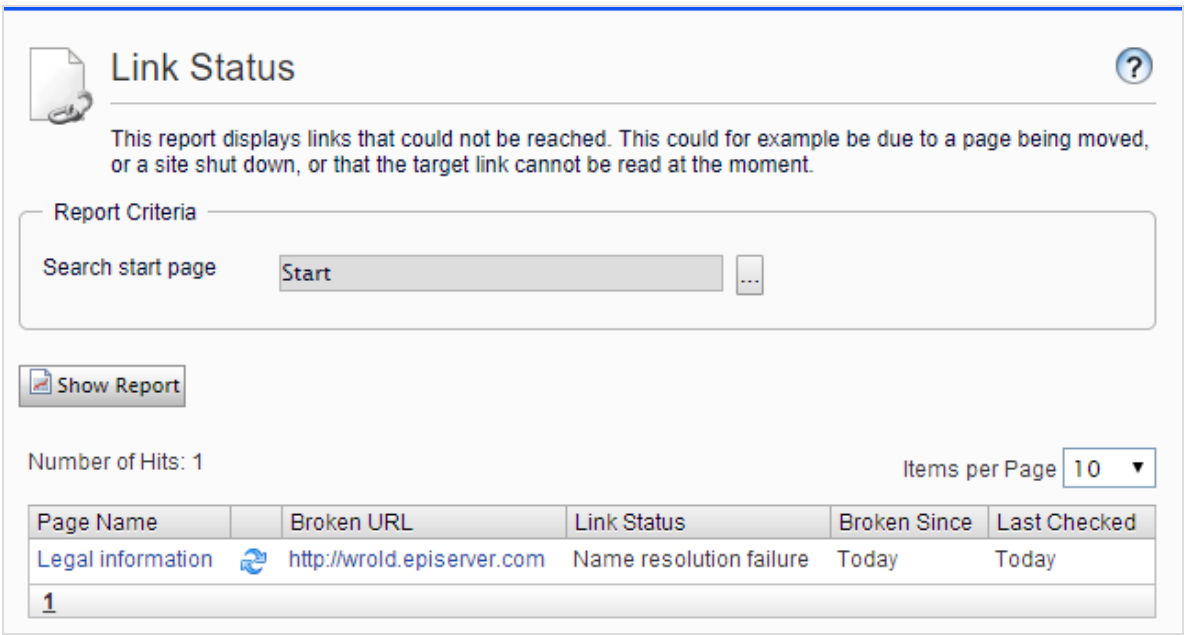
Reports

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

Reports for CMS content

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



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

The following sample reports are available for Episerver CMS:

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

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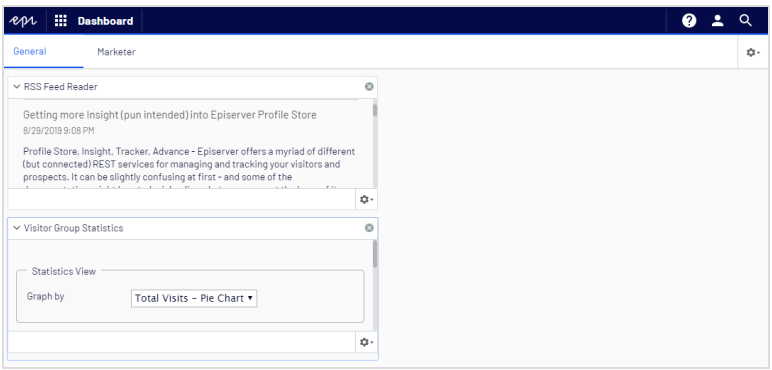
Managing gadgets

A gadget[1] is a small application or add-on that can be made available for easy access from the dashboard or the assets and navigation panes in Episerver. There are built-in gadgets both for the Episerver platform and product-specific ones, for example, gadgets for forms viewing, visitor groups statistics, version management and the product catalog, if you have Commerce installed. Developers can also develop custom gadgets to extend the features of your Episerver solution.



Gadgets are managed in a similar fashion both on the **dashboard** and in the **panes** in edit view. Click the Settings icon to access the gadget management options.

[1] Small application component that is responsible for its own rendering and behavior, accessible from the dashboard or the panes in the Episerver user interface. A gadget can contain functionality that you can use within the gadget interface or link away to other products integrated in Episerver (for example, a direct link to CMS / Pages where you can use the classic editing view features).

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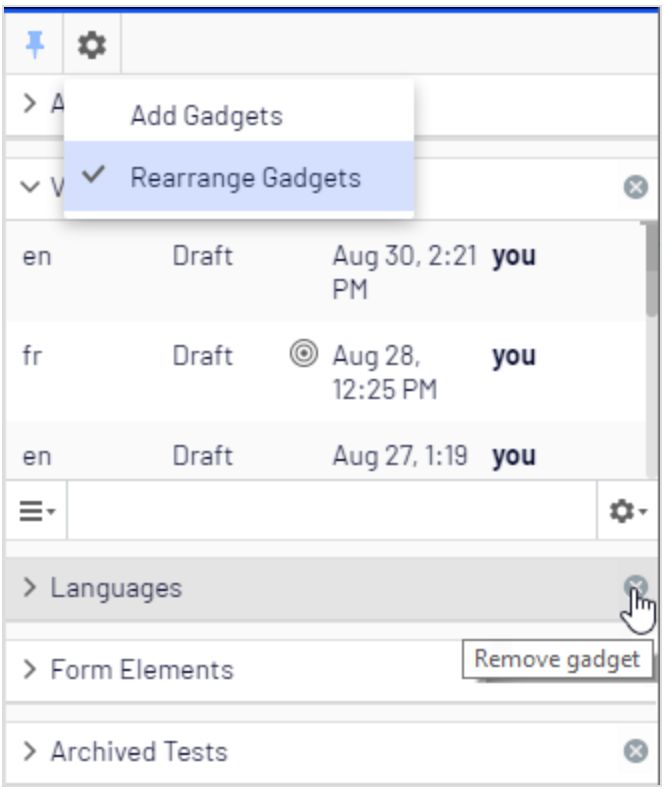

Adding gadgets

Select **Add Gadgets**, and select a gadget to add from the list of available gadgets.

Rearranging gadgets

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

Removing gadgets

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

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Built-in gadgets

Gadgets for the dashboard

- **External links**. Provides an overview of the external links of your website.
- **Forms viewer**. Lets you monitor the activity for a specific web form.
- **Notes**. Lets you add colorful "post it" notes to your dashboard.
- **RSS feed reader**. Shows the latest feeds from an RSS source of your choice.
- **Visitor groups statistics**. For monitoring visitor groups viewing personalized content.

See dashboard gadgets to edit the configuration settings for dashboard gadgets.

Gadgets for the panes in edit view

- **Archived Tests**. For viewing archived A/B tests. See A/B testing.
- **Blocks**. For accessing blocks (default in the assets pane).
- **Media**. For accessing media files (default in the assets pane).
- **Forms**. For accessing forms (default in the assets pane if the Episerver Forms add-on is installed).
- **Forms Elements**. Displays the forms elements that can be used when creating a form (only available if the Episerver Forms add-on is installed).
- **Project Items**. For viewing items belonging to a project. You can multi-select and mark items as **Ready to Publish**. from this gadget.
- **Sites**. Displays the page tree for the website.
- **Recent**. Displays items you have viewed during your current browser session.
- **Tasks**. Displays tasks to be done on the website. This gadget lets you filter items on status. You can, for example, see a list of all items set as **Ready to Publish**.
- **Recently changed**. Displays recently changed content on the website.
- **Versions**. For managing content versions. See Working with versions to work with versions.

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

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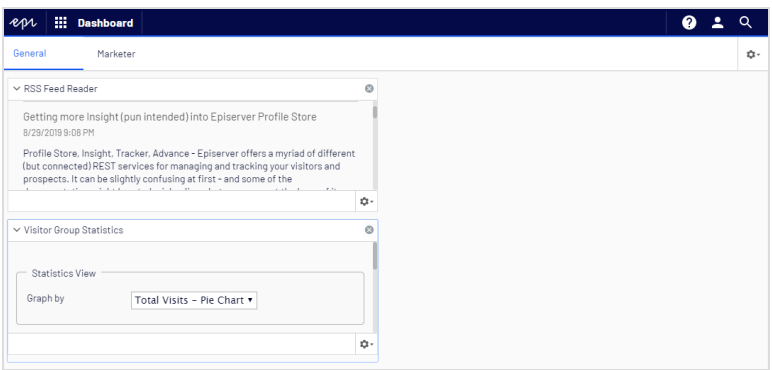
Add-ons

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

Managing dashboard tabs

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



Tabs

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

Creating tabs

Add a new tab on the dashboard as follows:

1. Select **New Tab** from the dashboard menu.
2. Select **Rename Tab** in the drop-down list for the tab you want to add and type a name for the tab.

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3. In **Layout**, define how many columns the tab information area will have by clicking one of the available options.
4. Add the gadgets you want to the tab you have just created as described in Managing gadgets.

> **Note:** You cannot change the order of tabs after they are created.

Editing tabs

Edit a tab on the dashboard as follows:

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

Deleting tabs

Delete a tab from the dashboard as follows:

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

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

Dashboard gadgets

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

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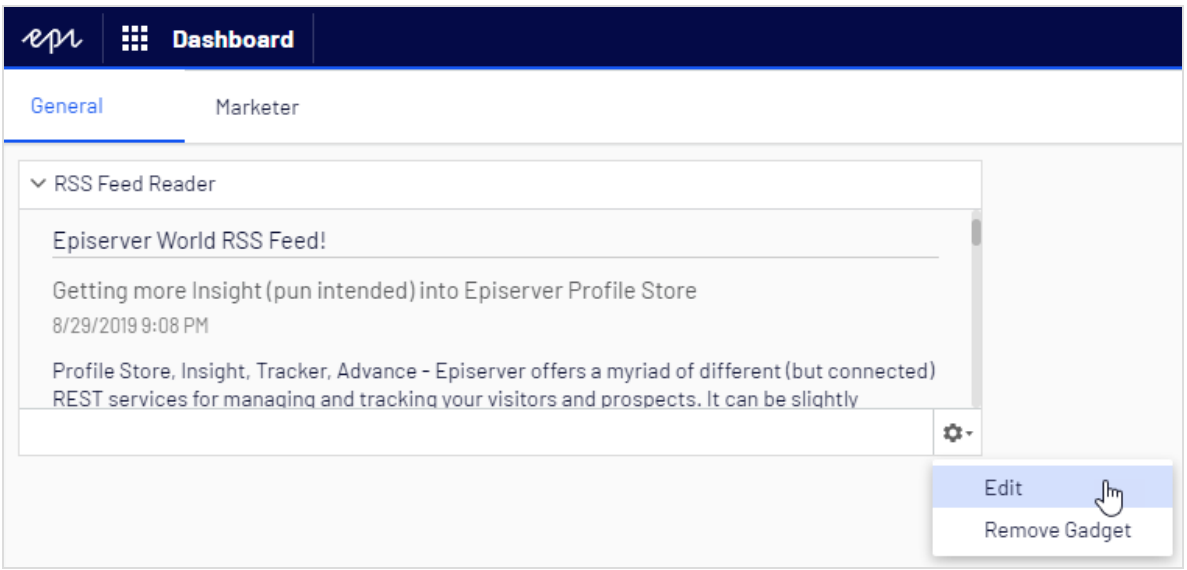

External links

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

Forms viewer

The forms viewer is a gadget for the old legacy built-in forms feature. For a description of this gadget, see version 18-2 or earlier of the Episerver User Guide.

Notes

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

RSS feed reader

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

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Visitor groups statistics

If you are using **personalization**[1] on your website, this gadget displays statistics for selected visitor groups viewing personalized content. By default, statistics are only counted once per session for each visitor group. This gadget can be used from the dashboard and the panes, and also an iPhone or iPad.

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

[1] Adapt 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.)

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Search

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

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

Built-in search features

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

- Full-text search features.
- Indexing of all content types: document files, pages and blocks.
- Event-driven indexing, meaning instant updating of the index and search results.
- Search results filtered on access rights.
- "Search-as-you-type," enhancing the search experience.
- Supports basic boolean operators like AND, OR, NOT, + , - and *.

Search options

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

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

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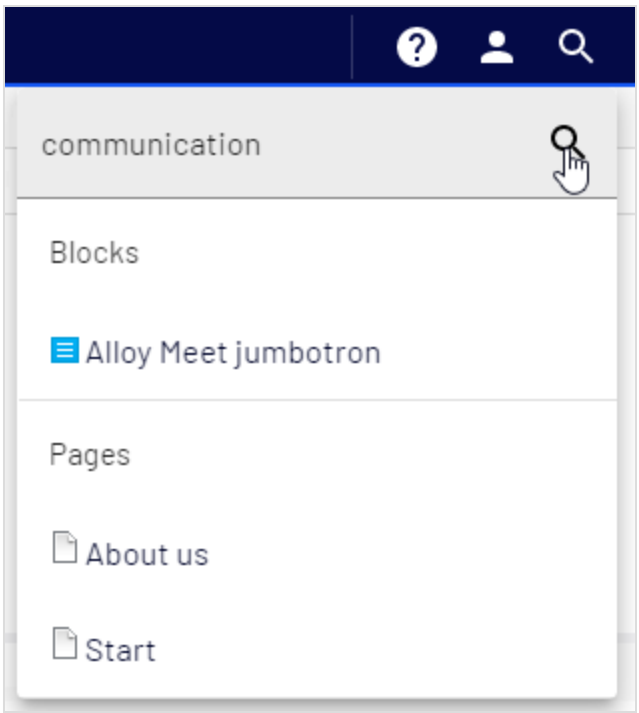

- When editing, a search option is available at the top of the navigation and assets panes, and in the link dialog. This option searches for content in the panes and related dialogs.

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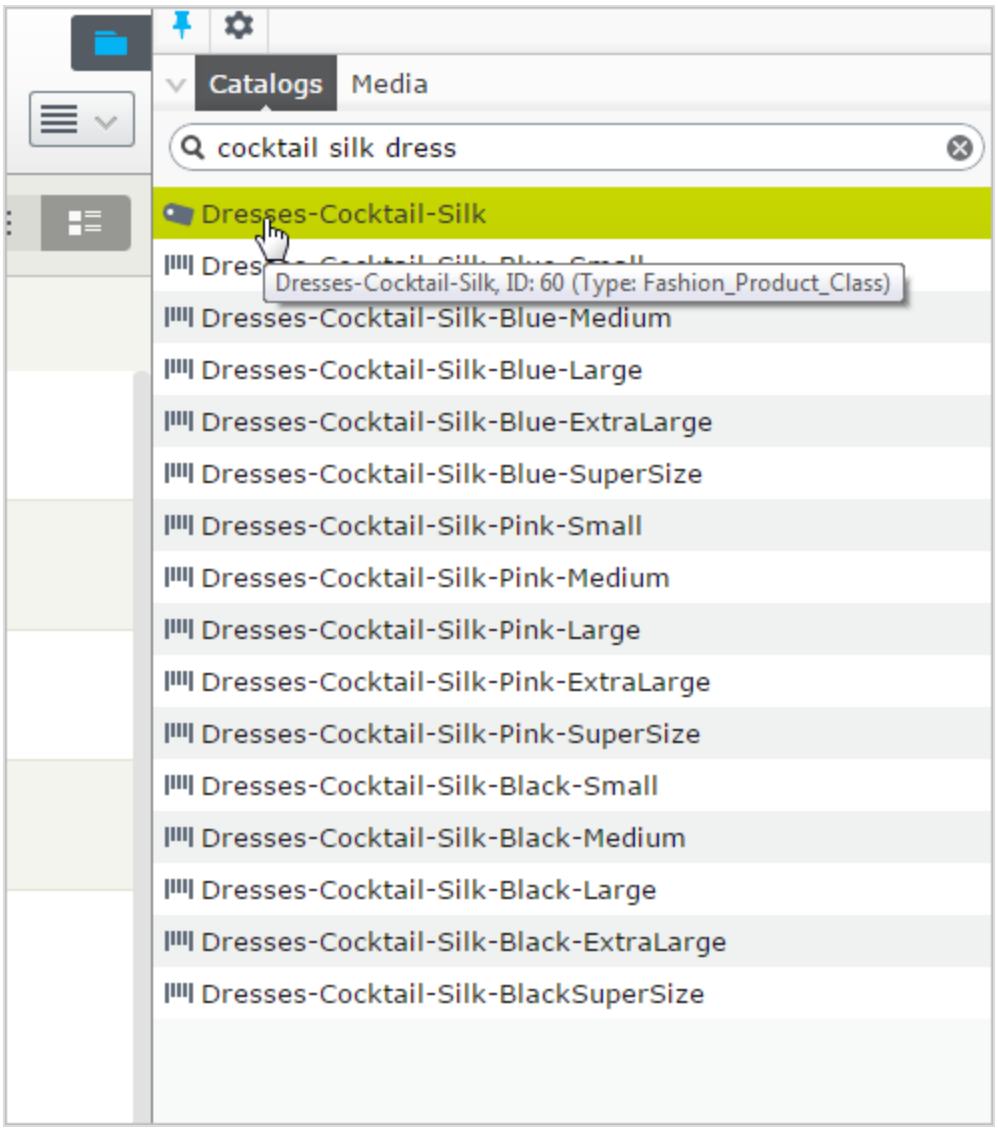

- Searching in the CMS edit view is described in the Finding content topic.
- Site visitors can usually search content through a search field and a search page on the front-end site, as in the Episerver sample templates.

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

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Search tips

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

Sorting search results

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

Configuring search

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

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Extended search with Episerver Find

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

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Index

A

A/B Testing
  setting up tests 133
access rights
  managing from edit view 112
  publishing, restricting 147
Add-ons
  Change approvals 161
administrators
  role 14
all properties, editing 26
anchor links 67
approving content 150
approving content changes 125
archiving expired content 132
assets
  approving 151
  overview 39

B

blocks
  access rights 54
  adding to content 49
  approving 151
  arranging in content area 52
  copying 53
  creating 58
    in block folder structure 46
    in For this page folder 47
  displaying 53
  editing 49
  finding 46
  finding where stored 48
  in multiple languages 54
  inserting into editor 51
  moving 53
  overview 45
  removing from content area 52
  translating 93
  versions 53
buttons, rich-text editor 59

C

category, content tab property 36
Change approvals
  add-on 161
changed pages report 191
collaboration 79
collection link 67
comments 79
community member role 13
comparing
  content properties 111
  content versions 109
content
  adding images 71
  adding to project gadget 168
  approving 125
  archiving expired 132
  area
    personalizing 100
  blocks
    adding 49
    arranging 52
  comparing two languages 111
  creating 57
    in another language 95
  deleting 119
    permanently 121
  draft 122, 128
    primary 128
  editing 31
  editor role 14
  expired 128
  finding 54

language
versions 129
moving to trash 119
overview 86
permanently mark as being edited 133
personalizing 99
previewing 107
properties
comparing 111
publishing 147
several items at once 167
ready to publish 124-125
removing 116
republishing 130
restoring from trash 120
reverting to previous version 123
scheduling for publishing 126
shared 133
tab 35
translating 92
versions 127
comparing 109
language 129
primary draft 128
content approvals 150
approving 158
assets 151
canceling approval sequence 158
commenting 161
declining 158
example, basic approval sequence 157
example, working with multi-languages 153
notifications 153
overview 150
starting approval sequence 158
tasks 156
working with approvals 158
customer role 13

D

dashboard 195
gadgets 196
tabs 195
date modified, updating 38
deleting
content 119
permanently 121
developer role 15
display in navigation property 34
downloading media 44
draft content 122
comparing with published 110
definition 128
primary version 128

E

edit view 31
additional properties 32
editing
all properties 26
content 26
on-page 26
editor
inserting blocks 51
rich-text 58
keyboard shortcuts 60
email links, inserting 66
expired content, archiving 132
expired pages report 191
external links gadget 197

F

fallback language 95
folders
access rights 42
creating 41
deleting 42
for all sites 41
for this block 41
for this page 41
for this sites 41
moving 41
multi-language 42
overview 40
renaming 41

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forms
viewer gadget 197

G

gadgets
adding 193
built-in 194
dashboard 194, 196
external links 197
for panes in edit view 194
forms viewer 197
notes 197
overview 192
rearranging 193
removing 193
RSS feed reader 197
visitor groups statistics 198
global menu 20
global properties, translating 94
global search 199
globalization 87

H

hyperlinks overview 62

I

images
adding to content 71
approving 151
editing 74
finding it 74
inserting link from 67
location 74
removing 77

K

keyboard shortcuts, rich-text editor 60

L

languages
blocks 54
comparing content in different 111
creating content in 95
fallback 95
impact on folders 42
managing 87
previewing content in 108
property 35
replacement 95
switching 88
user interface 87
versions
deleting 92
searching for 91
links
anchor 67
collection 67
creating 62
external 66
from image 67
internal 64
overview 62
status report 191
to email address 66
to files on external website 66
to files on file server 66
to media files 66
login 20

M

main body, content tab property 36
marketer role 14
media
channels, previewing content 108
downloading 44
files, linking to 66
inserting 44
metadata, editing 44
overview 42
previewing 44
publishing 44
renaming 45
replacing 45
searching for 43
uploading 43
versions, managing 45
menu, global 20
menus, sorting pages 116
merchandiser role 14
metadata, media 44
modified date, updating 38

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N

name in URL property 34

notes gadget 197

O

on-page editing 26

P

page order, sorting in menus 116

page tree icons 114

pages

- changed report 191
- copying 115
- creating 57
- expired report 191
- icons 114
- moving 115
- not published report 191
- published report 191
- translating 92
- tree structure 114

panes 24

- settings 24

personalization

- applying in content area 100
- applying within editor 99
- editing 101
- overview 99
- removing 101

previewing

- content 107
  - as visitor group 108
  - at different resolutions 108
  - for a project 108
  - in another language 108
  - via different media channels 108
- media 44
- project gadget 168

primary draft 128

project feature

- adding content 180
- creating project 180
- deleting project 184
- editing content 181
- overview 174
- previewing content 181
- project bar 176
- project items navigation pane 177
- publishing content 182
- removing content 184
- uploading media 181
- user interface 176

project gadget

- adding content 168
- creating 168
- deleting 170
- overview 167
- previewing 168
- publishing 169
- removing content 170

projects 166

- examples 185
- previewing content 108

properties

- content, comparing 111
- editing 33

published content

- comparing with draft 110
- reverting to previous version 123

published pages report 191

publishing 124

- access, restricting 147
- content 147
  - project feature 182
- managing via tasks 147
- project gadget 169

publishing media 44

R

ready to publish 124-125

recipient

- role 13

removing scheduled publishing of content 126

replacement language 95

reports

- changed pages 191
- expired pages 191

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link status 191

not published pages 191

overview 190

published pages 191

simple addresses 191

republishing content 130

resolution, previewing content using 108

restoring content 120

reverting to previously published content 123

rich-text editor 58

applying personalization 99

buttons 59

styles 59

roles 13

administrator 14

community member 13

content editor 14

developer 15

marketer 14

merchandiser 14

recipient 13

visitor, customer 13

website owner 13

RSS feed reader gadget 197

S

scheduling content for publishing 126

removing 126

search

AND OR 202

boolean 202

case sensitivity 202

configuring 202

global 199

in panes 200

multiple terms 202

overview 199

page ID 202

partial word 202

sorting 202

settings tab 37

shared content 133

shortcut, defining 38

shortcuts, keyboard

rich-text editor 60

simple addresses

property 34

report 191

sorting pages in tree structure 116

structure website 114

styles, rich-text editor 59

T

tabs 195

tasks

managing content creation tasks 147

Tasks

content approvals 156

TinyMCE editor 58

touch screen, prioritizing mouse input from 29

translation

blocks 93

content 92

global properties 94

overview 88

pages 92

several items simultaneously 167

trash 119

restoring content from 120

U

uploading media 43-44

user interface

languages, enabling 87

V

versions

blocks 53

content 127

primary draft 128

republishing 130

language, switching 88

video

A/B testing 134

managing contents with the projects feature 174

personalization with Eloqua 106

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personalization with HubSpot 106
personalization with Marketo 106
publishing content 122
visible to property 35
visitor groups
previewing content 108
statistics
gadget 198
visitor role 13

W

websites
owner role 13
structure 114

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