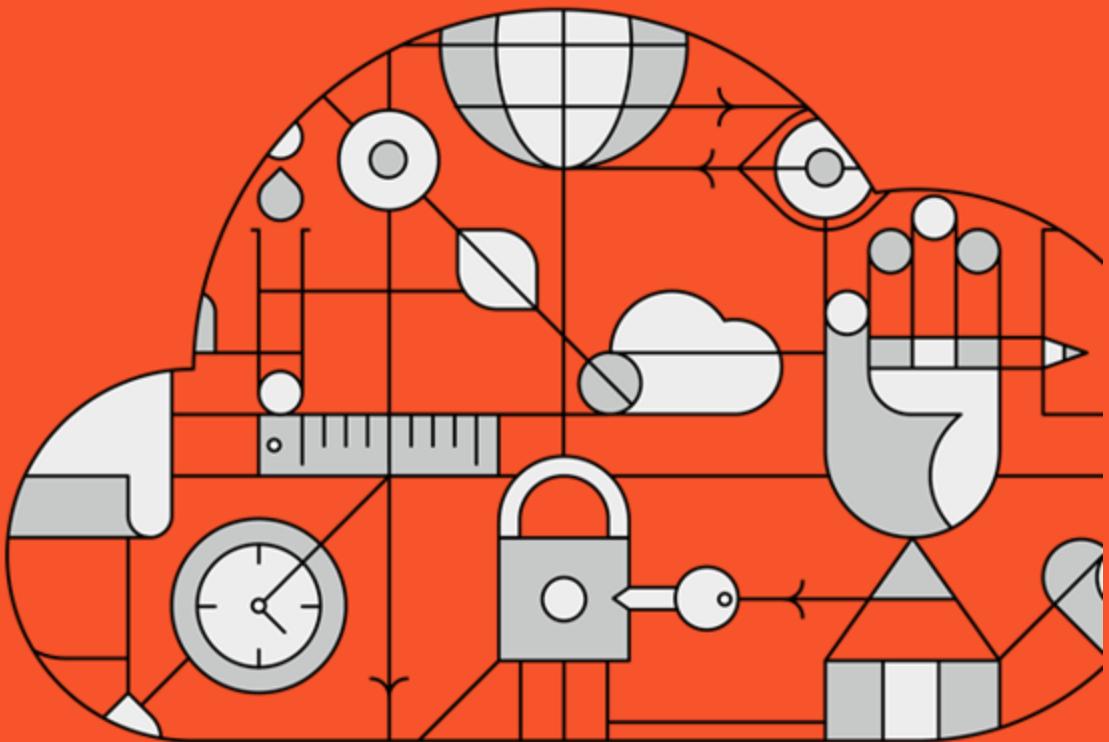




Episerver CMS

Administrator User Guide



Digital Experience Delivered.™



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Episerver CMS Administrator User Guide 16-5

Release date 2016-07-12

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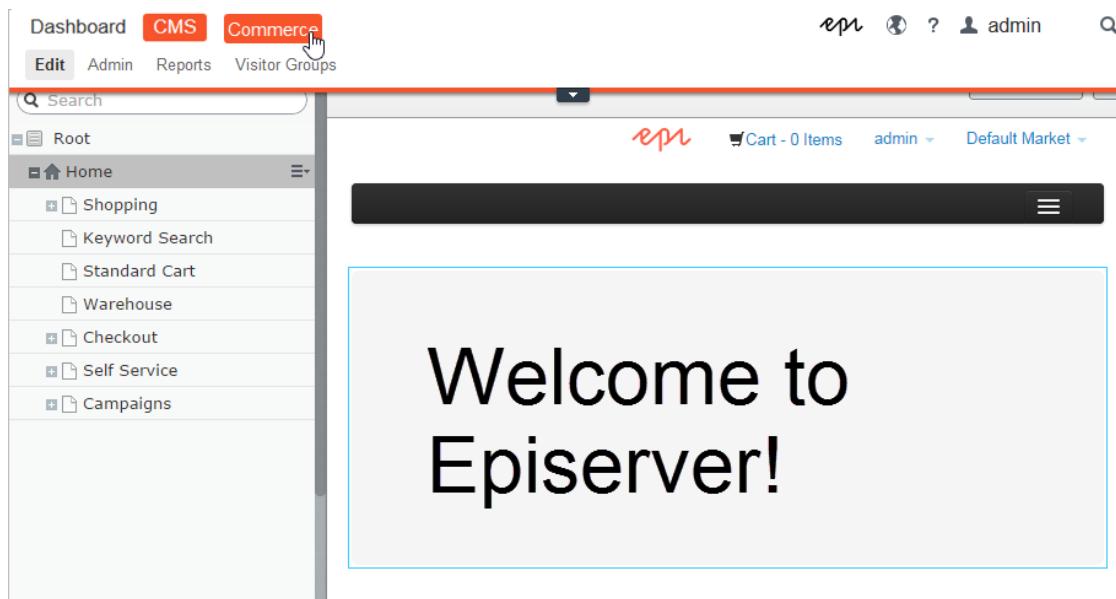
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Introduction

The features and functionality of the entire Episerver platform are described in an online help that opens in a web browser. The online help covers CMS for content management, Commerce for e-commerce functionality, Find for extended search, and Episerver add-ons. It is either accessed from within the Episerver platform or from [Episerver World](#). The online help is also divided into a number of PDFs for users who prefer those or want to print the documentation.

This PDF describes the features and functionality of Episerver CMS. PDFs for Episerver Commerce and Find can be found on [Episerver World](#). The user documentation is intended for editors, administrators, marketers and merchandisers, working with tasks as described in [Roles and tasks](#).



Developer guides and technical documentation are also found on [Episerver World](#).

Features, licenses and releases

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

CMS

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

Commerce

Episerver Commerce adds complete e-commerce capabilities to the core functionality in CMS. Commerce requires additional license activation.

Add-ons

Add-ons extend the Episerver capabilities with features like advanced search, multivariate testing, and social media integration. Some add-ons are free, others require

license activation. Add-ons by Episerver are described in the online help.



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

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What's new?

The Episerver user guide describes features in the Episerver platform, including CMS for content management and Commerce for e-commerce management, and add-ons from Episerver. New features are continuously made available through [Episerver updates](#).

This user guide (16-5) describes **features added up until and including update 119** for Episerver; see [Episerver World for previous user guide versions](#).

Area	Features and updates
CMS	<ul style="list-style-type: none"> » When you load the navigation or assets pane, the user interface now remembers which tab you had selected when you ended your previous session, as long as the same browser is used. (update 115) » Access rights was revised to expand its information. » You can watch the following demonstration video, Managing content with the Projects feature, with commenting and notification.(5:20 minutes)
Commerce	<ul style="list-style-type: none"> » The beta tag was removed from the new Campaign and Marketing features. » A new discount lets you give a shipping cost discount if specific items are included in the order. See Buy products for discounted shipping. (update 115) » A new discount lets you give free items to customers who spend a minimum amount on an order. See Spend for free item COM-100. (update 118) » A new discount lets you give a price reduction on selected items to customers who spend a minimum amount. See Spend for discounted selection COM-94. (update 118)

Getting started

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

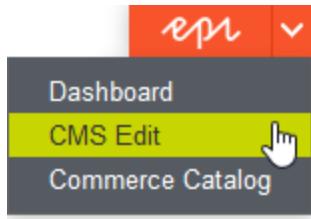
Logging in

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

Accessing features

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

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



Navigation

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



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

Next steps

Refer to the sections below for more information.

- » User interface and Roles and tasks in the CMS Editor User Guide for information about the Episerver user interface and roles.
- » Managing content in the CMS Editor User Guide for information on how to create and publish content.
- » Administration interface in the CMS Administrator User Guide for information on how to administer and configure settings in Episerver.
- » Commerce User Guide for information on how to work with e-commerce tasks, if you have Episerver Commerce installed.
- » Find User Guide for information on how to work with search optimization, if you have Episerver Find installed.
- » Add-ons section in the online help for information on how to use add-ons from Episerver, if you have any of these installed.

Roles and tasks

Episerver is designed for interaction with website visitors, as well as collaboration between users. A user in Episerver is someone working with different parts of the platform. A user can belong to one or more user groups and roles, depending on their tasks as well as the size and setup of the organization. Typical roles and related tasks are described below. Refer to Setting access rights in the CMS Administrator User Guide for information on how to configure user groups and roles in Episerver.

Visitor

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

Community member

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

Content editor

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

Marketer

A marketer creates content and campaigns with targeted banner advertisements to ensure customers have consistent on site experience of the various marketing channels. Furthermore, the marketer monitors campaign KPIs to optimize page conversion. A marketer with good knowledge of the website content may also want to monitor search statistics in order to optimize search for campaigns and promote content.

Merchandiser

A merchandiser typically works with stock on an e-commerce website to ensure that the strongest products are put in focus. This role also creates landing pages, sets product pricing, coordinates cross-product selling, oversees delivery and distribution of stock, and deals with suppliers. This user wants to be able to identify search queries with unusually high or low conversion rates, in order to adjust either the search or the product line.

Website owner

A website owner is someone with overall responsibility for the content and performance of one or more websites. This user monitors website activities such as page conversions, customer reviews or sales progress. Rarely creates content but can be involved in the approval of content created by others. A website owner may have administrative access rights and may be able to install selected add-ons on the website.

Administrator

An administrator works with configuration of various system settings from the administration user interface, including search, languages, user access rights and visitor groups for personalized content. Administrators may also install add-ons on the website. Administrators usually have extended access rights compared to other user groups, and can access all parts of the Episerver platform.

Developer

A developer is someone with programming skills working with the setup and implementation of the website, as well as maintenance and development of new functionality. Creates the content templates for pages, blocks and catalog content used by editors in CMS and Commerce, configures e-commerce

settings, and manages the index and customized search features in Find. Developers may also install add-ons on the website.

CMS

Administration interface

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

Administration view

Database Information	
Total number of pages in database	162

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

Visitor groups

[Visitor groups](#) are used by the personalization feature, and are managed from the **Visitor Groups** option in the global menu. You need administration access rights to manage visitor groups.

More on administration

Commerce Administration in Commerce

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

Addons Administration in Find

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

CMS

Access rights

You can control the content that a visitor sees and the content that users can edit on your website by setting access rights on content such as pages, blocks, media, and folders. A user or group has access rights on a per-content basis. For example, you may give members of the Marketing department access to edit the main website marketing material that other company users should not edit. Or you may want to give a visitor group from a local 10-mile radius access to an advertisement page.

The following table shows the types of access you can grant or deny to users and groups.

Access right	Description
Read	The user or group can access the content as a reader; otherwise the content is invisible.
Create	The user or group can create content under the content item on which this right is set.
Change	The user or group can access the content to modify it. Typically, Create and Change are set together but there may be cases where you want someone to modify created content (but not create their own content), or vice versa.
Delete	The user or group can delete the content.
Publish	The user or group can publish the content.
Administer	The user or group can access and edit dynamic properties and set access rights and language properties on individual content items from edit view for content given this access.  This does not provide access to admin view (for this you need to be a member of the WebAdmins group).

You can define specific access rights from the "Root" level and all the way down, including the **Recycle bin** (Trash) and **For All Sites** that stores blocks and media.

Set Access Rights for "Root"

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

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

Inherit settings from parent item
 Apply settings for all subitems

Save



Blocks and media share the same folder structure. If you want to [automatically publish media that are uploaded to the website](#), editors who upload must have **Publish** access rights in the folder (under **For All Sites**) to which the media are uploaded. Also, editors must have **Create** access rights in the **root** level of the website to create blocks.

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

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

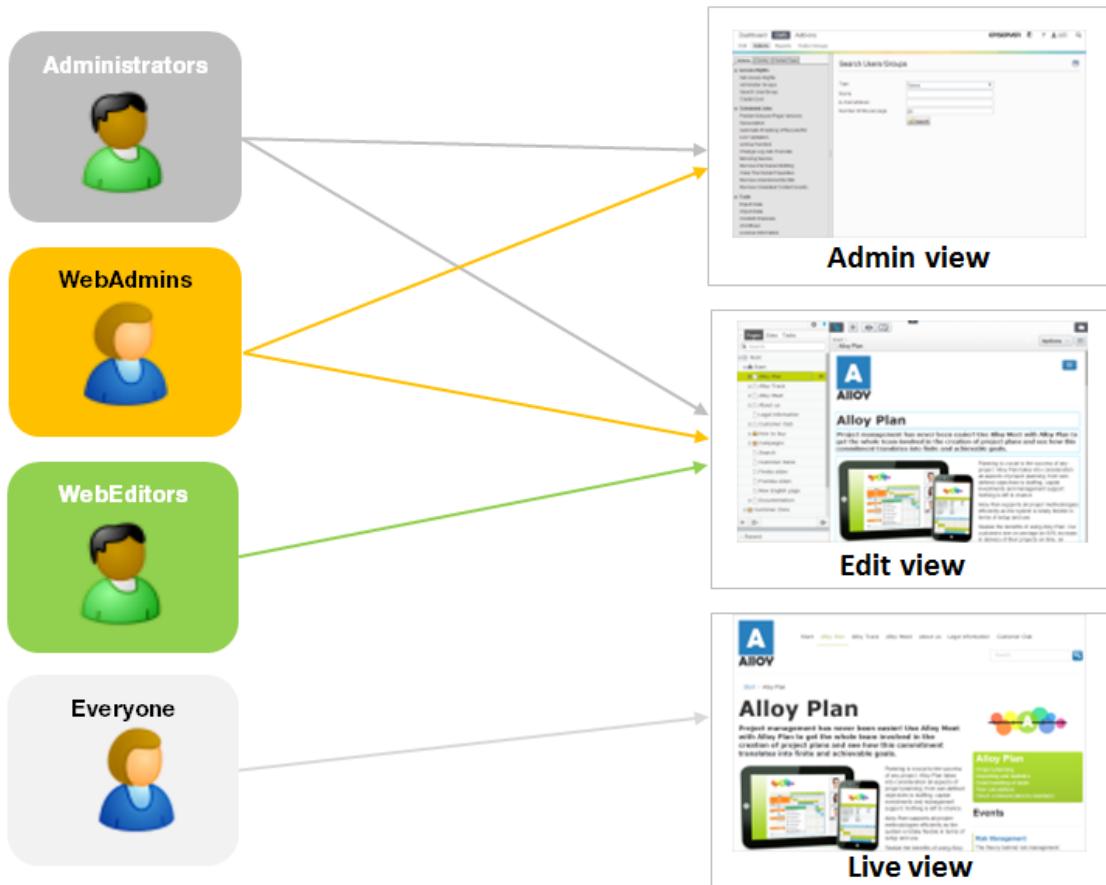
For example, add *Ann*, *Bob*, and *Cam* to a *Marketing* user group and give access rights to any number of pages and content to the *Marketing* group instead of each individual. To add *Dan* to all of the Marketing content, (or remove *Ann*), you modify the *Marketing* user group. You do not have to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

Built-in user groups

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



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



Group	Description
Administrators	Comes from Windows and is defined when the website is created, an administrator can access all parts of the system, and can edit all website content. Often,

Group	Description
	administrators are developers setting up or maintaining the website.
WebAdmins	<p>Comes with Episerver and can access both admin and edit views and the administration interfaces for add-ons and visitor groups. To use it, you must add this group name through CMS > Admin view > Admin tab > Administer Groups > Add > WebAdmins.</p> <p> Membership in WebAdmins does not provide editing access in the content structure by default. In most cases, only a few system administrators or “super users” belong to this group.</p>
WebEditors	<p>Comes with Episerver and can access the editing view. To use it, you must add this group name through CMS > Admin view > Admin tab > Administer Groups > Add > WebEditors.</p> <p>Add users to this group who need access to the edit view. Then add the users to other groups to give them specific edit rights to content. On large websites, editors are often organized in groups according to content structure or languages.</p>
Everyone	Comes from Windows and provides “anonymous” visitors with read access to website content. All unregistered visitors to a public website are anonymous, meaning that they cannot be identified by the system. Removing access rights for the Everyone group, requires login to access content even if it is published.

Setting access rights

1. Go to **CMS > Admin > Admin tab > Set Access Rights**. The Set Access view appears with a content tree structure of the website.
2. Click on a node in the content tree (for example, **Marketing**). Typically, a content item shows **Administrators** (with all access rights) and **Everyone** (with Read only access rights). You can change these rights or add new users or groups.
 - » If the users or groups are inactive (grayed out) for a content item, then the content item **inherits the access rights of its parent** content item. To set access rights for this content item, clear the **Inherit settings from parent item** check box. You can modify the access right for existing users or groups or add new ones.
 - » To add settings to all subitems without affecting their existing settings, select the **Apply settings for all subitems**; see [example](#).
3. Click **Add Users/Groups**. A dialog box appears.
4. Select the type you want: **Users**, **Groups**, or **Visitor Groups**.

5. Leave the **Name** field blank and click search to display all items of the type you selected. You can also type one or more characters in the **Name** field to filter and display a subset of items. (You also can select a user by **E-mail** address.) For example, add the **Marketing Group** group and user **Ann** to the **Marketing** content item's access rights.
6. Double click a user or group in the **Existing** box to move it to the **Add** box and click **OK**.
7. Modify the access rights settings as you want them and click **OK**. The users or groups appear in the Set Access Rights view for the select content tree item.

You manage access rights from the administration view in Episerver CMS, but you also can let editors manage access rights for a single page in edit view.



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

Setting inheritance for content subitems

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

Alloy
 Alloy Meet
 Alloy Plan
 Alloy Track

- » If you break inheritance for Alloy Meet and give access to user Ann, Bob, and Cam, the access rights become different from the parent (Alloy) and its two siblings (Alloy Plan and Alloy Meet).
- » If you then break inheritance for Alloy (parent) and add a Marketing group. Alloy Plan and Allow Track inherit the Marketing group (because inheritance is selected) but Alloy Meet does not because its inheritance is unchecked.

Subitems inherit from the closest parent only if the inheritance option is active (checked).

The following image shows the access rights for the **Marketing** content; no inheritance is set from the parent item or for subitems.

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

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

Applying settings for all subitems

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

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

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

If a parent item has a user or group that is the same as a user or group in a non-inheriting subitem (but each item has different access rights for the user or group), when you select **Apply Settings for all subitems**, the parent settings are applied to the subitem. For example:

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

Removing a user or group from the access rights list

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

Using a visitor group in an access rights list



Visitor groups are used by the personalization feature, and you need administration access rights to manage visitor groups. If you want an editor to manage visitor groups without providing access to the entire admin view, you can make the editor a member of **VisitorGroupAdmins**. This group provides access only to the **Visitor Groups** option in the global menu. **VisitorGroupAdmins** comes with Episerver but you must add this group name



through **CMS > Admin view > Admin tab > Administer Groups > Add > VisitorGroupAdmins.**

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

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

1. Go to **CMS > Admin > Admin tab > Access Rights > Set Access Rights.**
2. Click **Add Users/Groups**. The **Add Users/Groups** dialog box appears.
3. Select the **Visitor groups** type and select a visitor group. (Click **Search** while leaving the **Name** field blank to view available visitor groups.)



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

Access rights for Add-ons

Add-ons are plug-ins for extending Episerver functionality. You need administration access rights to manage add-ons.

If you want an editor to manage add-ons without providing access to the admin view, make the editor a member of **PackagingAdmins** group which provides access only to the **Add-ons** option in the global menu.



PackagingAdmins comes with Episerver but you must add this group name through **CMS > Admin view > Admin tab > Administer Groups > Add > PackagingAdmins.**

Some add-ons also may have specific user groups defined to access the functionality. See the documentation for each add-on in the online user guide to find out more.

Access rights for languages

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

Commerce

Access rights for Commerce

If you have Episerver Commerce installed on your website, see the Commerce access rights section in the Commerce User Guide .

Addons

Access rights for Find

If you have added Episerver Find to your website, see the Find access rights section in the Find User Guide .

CMS

Managing users and user groups

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

You can administer user credentials in the following ways:

- » Manage users and user groups from the CMS administration view.



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

- » Manage users and user groups in Windows.
- » Develop a customized role and membership provider.

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

Creating, editing and deleting users

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

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

New User

User Information Display Options

Username	Robert Williams
Password	*****
Confirm password	*****
E-mail address	robert.williams@alloy.com
<input checked="" type="checkbox"/> Active <input type="checkbox"/> Account locked (too many failed logon attempts)	
Provider	
Created date	
Last login date	
Description	

Not member of

WebAdmins

Member of

product_editors
WebEditors

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

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

Displaying members of a user group

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

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

Administer Groups

Delete or add groups used to assign access rights.

Group	Provider	Delete
Marketing Group	SqlServerRoleProvider	
1		

Users of group "Marketing Group"

Name	Provider	Delete
Ann	SqlServerMembershipProvider	
Bob	SqlServerMembershipProvider	
Cam	SqlServerMembershipProvider	
1		

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

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

Search Users/Groups

Type	<input type="text" value="Users"/>					
Name	<input type="text"/>					
E-mail address	<input type="text"/>					
Number of hits per page	<input type="text" value="26"/>					
<input type="button" value="Search"/>						
	Name	Provider	E-mail address	Description	Approved	Locked out
	Ann	SqlServerMembershipProvider	ann@example.com			
	Bob	SqlServerMembershipProvider	bob@example.com			
	Cam	SqlServerMembershipProvider	Cam@example.com			
	Dan	SqlServerMembershipProvider	dan@example.com			
	Ed	SqlServerMembershipProvider	ed@example.com			
	Fran	SqlServerMembershipProvider	fran@example.com			
	Gran	SqlServerMembershipProvider	gran@example.com			
	Han	SqlServerMembershipProvider	han@example.com			
	Ian	SqlServerMembershipProvider	ian@example.com			
	Jan	SqlServerMembershipProvider	jan@example.com			
	Ken	SqlServerMembershipProvider	ken@example.com			
	Len	SqlServerMembershipProvider	len@example.com			
	Mel	SqlServerMembershipProvider	mel@example.com			
	Nan	SqlServerMembershipProvider	nan@example.com			
	Ollie	SqlServerMembershipProvider	ollie@example.com			
	Pam	SqlServerMembershipProvider	pam@example.com			
	Quince	SqlServerMembershipProvider	quince@example.com			
	Rob	SqlServerMembershipProvider	rob@example.com			
	Stan	SqlServerMembershipProvider	Stan@example.com			
	Tam	SqlServerMembershipProvider	Tam@example.com			
	Una	SqlServerMembershipProvider	una@example.com			
	Van	SqlServerMembershipProvider	van@example.com			
	Will	SqlServerMembershipProvider	will@example.com			
	Xavier	SqlServerMembershipProvider	xavier@example.com			
	Yun	SqlServerMembershipProvider	yun@example.com			
	Zach	SqlServerMembershipProvider	zach@example.com			
1	2					

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

Search Users/Groups [?](#)

Type	<input type="text" value="Users"/>					
Name	<input type="text" value="a"/>					
E-mail address	<input type="text"/>					
Number of hits per page	<input type="text" value="26"/>					
<input type="button" value="Search"/>						
	Name	Provider	E-mail address	Description	Approved	Locked out
	Ann	SqlServerMembershipProvider	ann@example.com			
	Cam	SqlServerMembershipProvider	Cam@example.com			
	Dan	SqlServerMembershipProvider	dan@example.com			
	Fran	SqlServerMembershipProvider	fran@example.com			
	Gran	SqlServerMembershipProvider	gran@example.com			
	Han	SqlServerMembershipProvider	han@example.com			
	Ian	SqlServerMembershipProvider	ian@example.com			
	Jan	SqlServerMembershipProvider	jan@example.com			
	Nan	SqlServerMembershipProvider	nan@example.com			
	Pam	SqlServerMembershipProvider	pam@example.com			
	Stan	SqlServerMembershipProvider	Stan@example.com			
	Tam	SqlServerMembershipProvider	Tam@example.com			
	Una	SqlServerMembershipProvider	una@example.com			
	Van	SqlServerMembershipProvider	van@example.com			
	Xavier	SqlServerMembershipProvider	xavier@example.com			
	Zach	SqlServerMembershipProvider	zach@example.com			
	mame	WindowsMembershipProvider				
1						

Creating and deleting groups in CMS

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

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



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

Administer Groups

Delete or add groups used to assign access rights.

Add

	Group	Provider	Delete
	WebAdmins	SqlServerRoleProvider	<input type="button" value="X"/>
	WebEditors	SqlServerRoleProvider	<input type="button" value="X"/>
	Administrators	WindowsRoleProvider	<input type="button" value="X"/>
	Everyone	WindowsRoleProvider	<input type="button" value="X"/>
	NT AUTHORITY\Authenticated Users	WindowsRoleProvider	<input type="button" value="X"/>
	NT AUTHORITY\Local account	WindowsRoleProvider	<input type="button" value="X"/>
	NT AUTHORITY\Local account and member of Administrators group	WindowsRoleProvider	<input type="button" value="X"/>
	NT AUTHORITY\NETWORK	WindowsRoleProvider	<input type="button" value="X"/>
	NT AUTHORITY\NTLM Authentication	WindowsRoleProvider	<input type="button" value="X"/>
	NT AUTHORITY\This Organization	WindowsRoleProvider	<input type="button" value="X"/>
	Users	WindowsRoleProvider	<input type="button" value="X"/>

1

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

Scheduled jobs

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

Administering scheduled jobs

Manage scheduled jobs as follows:

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

The screenshot shows the Episerver CMS Admin interface with the 'Scheduled Jobs' section selected. The left sidebar lists various scheduled jobs, and the main content area shows the configuration for the 'Automatic Emptying of Trash' job. The 'Settings' tab is active, displaying the following configuration:

- Scheduled job interval:** Set to 1 week.
- Next scheduled date:** Set to 2015-12-15 00:30.
- Status:** The 'Active' checkbox is checked.

At the bottom of the screen, there are three buttons: **Save**, **Start Manually**, and **Stop Job**.

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

Settings	History	
Date	Status	Message
5/21/2013 10:34:54 AM	OK	0 content items were deleted from recycle bin.
5/20/2013 8:55:01 AM	OK	0 content items were deleted from recycle bin.

CMS

Built-in scheduled jobs

Automatic Emptying of Trash

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

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

Publish Delayed Content Versions

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

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

Subscription

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

Archive Function

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



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

Remove Permanent Editing

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

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

Link Validation

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

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

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

Mirroring Service

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

Monitored Tasks Auto Truncate

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

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

Notification Message Truncate

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

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

Notification Dispatcher

Set the **Notification Dispatcher** job to determine how often Episerver CMS sends notifications of new or updated comments or replies posted in projects by a notification provider (for example, an email provider). Notification messages are sent to:

- » users who are tagged in a comment or reply
- » users who receive replies to their comments
- » users who receive comments on their project actions (such as setting a project item to Ready to publish)
- » other users who have previously replied to the same comment

A notification is not sent if no new comments or replies were posted since the job last executed.

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

Clear Thumbnail Properties

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

Change Log Auto Truncate

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

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

Remove Abandoned BLOBS

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

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

Remove Unrelated Content Assets

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

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

Commerce Commerce-related scheduled jobs

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

Addons Find-related scheduled jobs

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

Other scheduled jobs

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

Exporting and importing data

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

Exporting data

You can export the following:

- » Content items
- » Content types
- » Frames
- » Dynamic property definitions
- » Tabs
- » Categories
- » Files
- » Visitor groups

When you select a type of item to export, available items of that type on the website are displayed.

Export Data

Export data from one EPiServer CMS to another.

Export content items
 Select part of structure

Export files that the pages link to
 Automatically export dependent content types

Export content types

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

Export frames
 Export tabs
 Export categories
 Export visitor groups

Select the items to transfer and click **Export** to download the file package.

Importing data

With the **Import Data** function, you can retrieve information exported from another Episerver website. Start by selecting the file package to import, files must end with *.episerverdata for the import to work.

Click **Upload and Verify File** to verify the file content. The files are read and checked, and verification information is displayed. Select a destination to add imported pages, and click **Begin Import**.

Import Data

Import data from another EPiServer CMS.

Select an export file and upload ExportedFile (...episerverdata)

Select page destination

Update existing content items with matching ID

If you select **Update existing pages with matching ID** check box, the import keeps the same GUID-based identities for items (such as pages, blocks and files) as they had on the exporting site. The import checks whether an item already exists and, if true, that item is updated (if the imported item had a changed date that is later than the existing item). This means that content items with the same ID are replaced instead of added, with every new import.

CMS

System settings

System settings let you define certain settings for the Episerver CMS installation, for instance, to activate globalization, change the error handling, and configure version management of content.

General tab

System Settings

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

General **Editing**

Error handling in EPiServer CMS	Active for remote visitors
Handler for subscription updates	EPIserver CMS default
<input type="checkbox"/> Encrypt the connectionStrings.config file <input checked="" type="checkbox"/> Enable globalization <input type="checkbox"/> Detect language via browser's language preference <input type="checkbox"/> Disable deletion of content versions	

Save **Cancel**

Setting	Description
Error handling in Episerver CMS	Select how you want errors to be handled; active for all visitors, remote visitors, or disabled.
Handler for subscription updates	The subscription function in Episerver lets visitors receive information about new and updated pages. Depending on whether multi-language is supported, you can select how the subscription dispatch is managed. This list also can include your own solutions for the subscription function.
Encrypt the connectionStrings.config file	Select to encrypt the connectionStrings.config file, which contains sensitive information sent to and from the database.
Enable globalization	Select to activate management of content in multiple languages (globalization).
Detect language via browser's language preference	Select to activate languages to be shown based upon the visitor's browser settings.

Setting	Description
Disable deletion of content versions	Select to disable the ability of editors to delete versions of pages, blocks and files. Selecting this also disables the automatic deletion of versions caused by the Maximum number of versions field on the Editing tab.

Editing tab

System Settings ?

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

Path to CSS file for the Editor	<input type="text" value="~/Static/css/Editor.css"/>
Maximum number of versions	<input type="text" value="20"/>
<input type="checkbox"/> Unlimited versions <input checked="" type="checkbox"/> Automatically publish media on upload <input checked="" type="checkbox"/> Enable Projects	

Save Cancel

Setting	Description
Path to CSS file for the rich-text editor	Controls the appearance of the rich-text editor. This can be the same or similar CSS file as the site uses for styling content so that the editors get the same appearance as the site when editing content. You also can set other CSS files for different editors on the website. This is a dynamic property that you can change in the edit view.
Maximum number of versions	<p>Specify the number of previously-published versions of content items (for example, pages or blocks) that are stored. The currently-published version and draft versions are not counted.</p> <p>For example, if you enter 3, Episerver CMS stores three previously-published versions. If that is the case for a content item and you publish a new version, the oldest version is removed.</p> <p>Default value is 20 versions.</p> <p>This field is ignored if the Unlimited versions or Disable deletion of content versions box is selected.</p>
Unlimited versions	Stores an unlimited number of versions of content items (such as pages or blocks). This option may result in a large version list, which can be difficult to

Setting	Description
	<p>use unless you manually delete unwanted versions.</p> <p>If you check this, the value in the Maximum number of versions field is ignored.</p>
Auto publish media on upload	<p>Select to automatically publish and index media when uploaded to the website. Note: If a user uploads media but does not have publishing rights in the folder to which the media is uploaded, then the uploaded documents are not published (images, for instance, are not displayed when used in content). Ensure that editors who upload media also have the proper access rights set in the media folder structure.</p> <p>Also note that if this check box is selected and a user (with the proper access rights) uploads media, it is published and indexed immediately, so can be found by search engines, even if no published page contains links to the media.</p> <p>If the projects feature is enabled in your system, this setting is ignored. Uploaded media that is associated with a project is not published until it is manually published or published via scheduling, even if this setting is turned on.</p>
Enable Projects	<p>Select to enable the projects feature which lets editors publish multiple related content items at the same time.</p> <p>When enabled, it is enabled for your entire website and for all editors. For more information, see The projects feature section in the CMS Editor User Guide.</p> <p>If you want the CMS interface to update immediately and to use the notification features, you need to enable WebSocket support on your web server. See WebSocket support in the CMS interface in the CMS Developer Guide for more information.</p>

Managing websites

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

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

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

You can add new websites in the following ways:

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

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

Requirements

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

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

Adding and updating a website from admin view

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

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

Site setting	Description
Name	Type a name that identifies the website, such as <i>Example Site</i> .
URL	Enter the URL for the site, such as <i>http://examplesite.com</i> .
Start page	Select the page to which the visitor is sent if only a host name is specified.
Use site-specific assets	Select this check box to ensure that assets for this site are not available for use on other sites in the installation.
Host name	<p>Optional. Enter a specific URL, such as <i>examplesite.com</i>. If you do not name the website, it is automatically named with the URL you have entered.</p> <p>One of the sites in the installation must be bound to the * host name. That site is used as a fallback when an exact match for the host name used by the visitor cannot be found. This setting is less important in a single-site scenario, because you can have only one site configuration. However, in a multi-site scenario, you must make sure that host bindings active in IIS are mirrored in the corresponding site configuration. For example, you want to add <i>examplesite.se</i>.</p> <p>Usage: The host name list is evaluated by the application in two different scenarios:</p> <ul style="list-style-type: none"> » Request routing. When serving a request, the application evaluates the host list to see which site and language (culture) that should be served.

Site setting	Description
	<ul style="list-style-type: none"> » Cross-site linking. When generating links to another site or culture, the host list is evaluated to find the host name to use for constructing the link URL.
Culture	<p>Select the default language for when a visitor accesses the website using the host name.</p>
Type	<ul style="list-style-type: none"> » Primary host. A primary host is the preferred host name when generating links between sites or languages (cultures). If no host is defined as primary, the first non-redirected host and non-edit host is used. You can define only one primary host per language plus one primary that is unbound to any language. » Edit host. An editing host is the preferred host name to use when editing a site. This host name is used for all links between sites when the users are in the editing view. If no editing host is defined, the primary or first found host is used. You can define only one editing host per site and you cannot bind it to any language. Users are not forced to the edit host for editing and remain on their current host if the editing view is requested from another host on the site. » Redirection host. A redirection host defines that requests using this host name are redirected to a different host name. Such requests are redirected to the primary host or, if none is defined, the first non-redirected host found. You can set redirection to permanent or temporary, which determines the type of HTTP redirect status that should be used. Redirected host names are never used when generating links. There can be any number of redirection hosts defined as long as there is at least one primary or standard host name bound to the same language.
Scheme	<p>Select the preferred scheme to be used for this host. This affects only the generation of links to the site as incoming requests are matched to the host name regardless of scheme.</p>

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

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

Edit Website

Settings associated with the site.

This installation is licensed for 1000 sites.

Settings

General

Name	Example site
URL	http://examplesite.com/
Start page	Customer Zone [48] <input type="button" value="..."/>
<input type="checkbox"/> Use site-specific assets	

Host Names

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

Add

Delete Site Save Cancel

This example would lead to the following behavior:

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



Canonical links added in the templates should point to http://examplesite.se

- » A request to http://redirected.no/page/ is redirected to http://examplesite.no/page/ using an HTTP 301 response as this is the only Norwegian host that is not redirected.
- » A request to http://redirected.com is redirected to http://examplesite.com using an HTTP 302 response as per the wild card specification.

EXAMPLE: Campaign website

The following example shows a campaign website:

Edit Website ?

Settings associated with the site.

Settings

General

Name	Campaign site
URL	http://summertutorial.examplesite.com
Start page	Start [5] ...
<input type="checkbox"/> Use site-specific assets	

Host Names

Host Name	Culture	Type	Actions
summertutorial.examplesite.com			

Add

Delete Site Save Cancel

Managing website languages

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

Language overview

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

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

Adding and editing languages

1. On the **Config** tab, select **Manage Website Languages**.
2. Click a language to edit its settings, or click **Add Language** to add a new language. A list of available language codes appears. Select a language code by clicking the name.
3. In **Name**, enter a name for that language to be shown in the edit view. The field contains the name of the language encoding, but you can change this if you want.

- Select **Enabled** if you want the language to be active for editing in edit view. This option also affects whether the language is available to website visitors. A disabled language is not visible in the edit view. Existing content in that language is still accessible, but it cannot be edited.

français - fr

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

Name: français

Template icon: ~app_themes/default/images/flags/fr.g

Web address prefix:

Users/groups for creation and editing:

- Everyone (checked)
- French visitors (checked)
- Add Users/Groups

Buttons: Delete, Save, Cancel

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

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

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

- Click **Save**.



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

Deleting an existing language

You should remove a language from the website by opening the language for editing, and clear the **Enabled** option.

Creating categories



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

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



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

Adding a category

Add a new top-level category as follows:

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

Categories

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

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

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

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

Deleting or changing a category

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

Editing frames and tabs

Frames

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

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

Tabs

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

Edit Tabs

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

Add

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

Adding and editing a tab

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

Permissions for functions

Setting of access rights from Permissions for Functions

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

- » **Detailed error messages for troubleshooting** provides selected groups or users access to detailed error messages. In **System Settings**, you can activate a function that provides visitors with a form to fill in whenever a technical error occurs on the website. By changing the access rights here, you can specify who should receive these forms.
- » **Allow the user to act as a web service user** lets a user call one of the web services provided by Episerver. This function is used only for system integration purposes.
- » **Allow users to move data/pages between page providers** lets selected users or groups move pages between page providers. This is used for websites with a custom page provider integrated with another system. Because data is deleted in the source provider, you may want to limit access to this function.

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

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

Deleting permissions to a function for a group or user

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

For information about working with access rights, see [Access rights](#).

Tool settings

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

- » [Plug-in manager](#)
- » [Change log](#)
- » [Rebuild name for web addresses](#)
- » [Mirroring](#)
- » [Search configuration](#)

Plug-in manager

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

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

Change log

By default, all changes to pages, files and directories are logged in the **Change Log** system. You can filter the information in the Change Log, making it easier to find relevant information.

Changing the Change Log state

1. In admin view, select **Config** tab > **Tool Settings** > **Change Log**.
2. Select a state:
 - » **Enabled**. The Change Log starts automatically when the site starts and is available for read and write operations.
 - » **Disabled**. The Change Log does not start when the site starts. Items written to the Change Log are ignored, but items may still be read from the Change Log.
 - » **Auto**. The Change Log starts as soon as any dependencies (such as a Mirroring Job) are registered against it. If no dependencies exist, the system does not start. If already running, it stops.

Filtering the Change Log

1. On the **View** tab, filter and view change log items by entering one or several of the following values:

Field name	Description
Change date from	The query is run from the change log from this date.
Change date to	The query is run from the change log to this date.
Category	From the Category drop-down list, select: <ul style="list-style-type: none"> » Page to run a query on pages only. » File to run a query on files only. » Directory to run a query on pages directories only. If you do not select an options from the drop-down list, changes are read from the Change Log when the query is run.
Action	You can filter the following actions in the Change Log: <ul style="list-style-type: none"> » Check in » Create » Delete » Delete language » Move » Publish » Save » Delete children
Changed by	To filter for a specific user, enter the Episerver CMS user name.
Maximum number of items per page	Limits the displayed number of items. Click the next and previous arrows to browse through the list of items.

Field name	Description
Start with sequence number	Enter a specific sequence number to start listing the items in the change log.
Read direction	List change log items in either ascending or descending order.

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

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

Website developers can customize and extend the Change Log. Consult your website developer for assistance.

Rebuild name for web addresses

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



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

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



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

Creating a rebuilding name for web address

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

The screenshot shows a tool settings page titled 'Replace Page Names in Web Addresses'. It includes a description: 'Replaces the name of web addresses to build links that reflect the structure for the website.' Below this is a button labeled 'Rebuild Links' with a green checkmark icon. A checked checkbox labeled 'Rebuild all page names in web addresses (overwriting existing links)' is present. At the bottom is a table with three columns: 'Status', 'Scanned pages', and 'Fixed pages'. The table has one row showing 'Inactive' status with '0' in both the scanned and fixed pages columns.

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

Mirroring

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

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

To enable mirroring, a mirroring application must be installed and running. The application handles data transfer between websites and is run separately to the Episerver CMS source and target sites. You can configure source and target websites to use separate mirroring applications. You also can install and configure a single mirroring application. See [Episerver World](#) for information about configuring and working with mirroring.

Mirroring Settings

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

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

Delete Save Cancel Reset Channel Check System

Creating a channel

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

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

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

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

Setting	Description
	select this option, the E-mail address field becomes editable.
E-mail address	Enter the email address where the mirroring job report is sent.
Continue on Error	Select to enable a mirroring job to continue even there is problem on the importing side. If this option is not selected, a mirroring job terminates as soon as an error occurs.
Enabled	Select to enable the channel as active. If this option is not selected, nothing is mirrored for the channel.
Enable validation	Select to enable validation before items are mirrored. The mirroring job validates that all page types for pages being mirrored are present in the target site and that the page type has the same number and type of page properties as the source site. By default the mirroring job checks all necessary page types and page definitions, which is included in the start page and its descendants.

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

Setting	Description
Reset Channel	Select to mirror everything again from the root page of the mirroring channel to the source site next time it is run. To reset the channel, select the name of the mirroring channel and click Continue with Reset .
Check System	To validate the created channel, click Check System . The result appears under the Messages tab. It checks both the source and target site to see if all necessary parameters are set up correctly; such as URI, Root page at destination, Mirroring Server binding, and Access to DataBase. See the section about synchronizing mirroring in the Developer Guide under <i>Deployment > Mirroring > Installing and Configuring mirroring</i> .
Messages	The result of a check system appears in the Messages tab. Click the arrow to view the result and other information regarding previous mirroring jobs that were run.
Monitoring	The status of a mirroring job appears in the Monitoring tab.

Setting	Description
Target Site Configuration	To use a site as a mirroring target, some configuration is required.
Mirror Pages to a Target Site	Create a target page in the editorial interface on the target site and create a page that acts as the root page for the mirrored pages. You also can use an existing page as the mirroring root page. To publish pages, the mirroring application needs to be installed and configuration needs to be implemented.
Mirroring in Other Formats	Partners and customers can create mirroring in formats other than Episerver CMS Import/Export format and plug them in using the provider model.

Search configuration

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

Enabling search providers

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

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

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

Properties

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

Property types

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

The following types of properties are used:

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

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

Editing and adding properties on content types

A common example for editing properties is to define toolbar buttons for the [TinyMCE rich-text editor](#). You normally define properties in code but occasionally add them in admin view, because properties added from there are not rendered.

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

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

Editing a property

The upper **General** section of the **Common Settings** tab contains information about a selected property. If a property is **defined in code**, information about it is displayed, but you cannot change

values such as property type and presentation control. You can change other settings, such as making a property mandatory or searchable. The lower **User Interface** part contains settings related to the property display in edit view.

See **Adding a Property** below for information about available settings for properties.

The screenshot shows the 'Edit Property' dialog box with two tabs at the top: 'Common Settings' (selected) and 'Custom Settings'. The 'General' section contains the following fields:

- From code:** Yes
- Type:** XHTML string (>255)
- Name:** MainBody
- Presentation control:** Use configuration settings
- Default value:**
 - No default value
 - Inherits value
 - Value must be entered
 Searchable property
 Unique value per language

The 'User Interface' section contains the following fields:

- Field name:** MainBody
- Help text:** (empty)
- Tab:** Content
- Sort index:** 310

At the bottom right are three buttons: Save (blue), Revert to Default (red), and Cancel (green).

Adding a property

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

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

Field	Description
Sort index	Select a relative number to sort this property among other properties.

3. Click **Save**.

The **Custom Settings** tab displays custom information for the selected property type. Here, you define available buttons in the toolbar of the TinyMCE rich-text editor, which is based on the property type **XHTML string (>255)**.

Defining language-specific properties

When working with globalization, you define in every template which fields vary depending upon the language. To do this, set whether the property for that field should be “locked” or “open” for globalization. This is done using the **Unique value per language** setting in admin view.

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



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



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

Setting a property to be language-specific

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

The screenshot shows the 'Edit Property' dialog with two tabs: 'Common Settings' (selected) and 'Custom Settings'. The 'General' tab is expanded, displaying the following configuration:

- From code:** Yes
- Type:** XHTML string (>255)
- Name:** MainBody
- Presentation control:** Use configuration settings
- Default value:**
 - No default value
 - Inherits value
 - Value must be entered
 Searchable property
 Unique value per language

The 'User Interface' tab is also expanded, showing:

- Display in edit view
- Field name:** MainBody
- Help text:** (empty)
- Tab:** Content
- Sort index:** 310

At the bottom right are three buttons: Save (blue), Revert to Default (red), and Cancel (grey).

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

Organizing properties in content

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

Changing the order of properties

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

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

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

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

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

Placing a property on a tab

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

Configuring customized property settings

Under **Property Configuration** and **Edit Custom Property Types** and **Dynamic Properties**, you can configure custom property types.

Priorities and configuration

The property settings have the following priority:

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

You can create a property, name it, and give it a data type and other settings. You can locate property settings in admin view under on the **Config** tab > **Property Configuration**.

- » Dynamic properties are inherited. When defined on a selected page, a property is inherited to the subpages. If you have other values stored on one of the subpages, you can choose to retain or overwrite the property values. Applying dynamic properties to pages is done from the **Dynamic Properties** option in edit view.
- » You can edit built-in property types under the **Edit Custom Property Types** section. User-defined property types can be created and named here also.
- » Add and edit dynamic properties under the **Dynamic Properties** section.

Creating custom property types

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

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

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

Data type name	Base type	Description
Boolean	Selected/not selected	True or false.
Number	Integer	An integer.
FloatNumber	Floating point number	Number with decimals, for example, 3.14.
PageType	Page Type	Episerver CMS page type defined in admin view.
PageReference	Page	Link to an Episerver page in the current site.
Date	Date/Time	Date and time.

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



Default values for properties are not defined in code.

CMS

Configuring the rich-text editor

The editor in Episerver CMS is configured on the **Page Type** tab, by selecting a page type and either adding or updating a property of the **XHTML String (>255)** type.

Properties based on the **XHTML String (>255)** property type result in a rich-text HTML editor, which you can configure by choosing which buttons are available. In a standard installation of Episerver CMS, the editor is a customized version of the open source rich-text editor **TinyMCE**. TinyMCE has many functions, is easy for developers to customize, and works with all browsers supported by Episerver CMS.

This description applies to a standard installation of Episerver CMS, with a selection of functions being available. You can incorporate additional functions and customizations into the editor from admin view. See [Episerver World](#) and the official [TinyMCE website](#) for information.

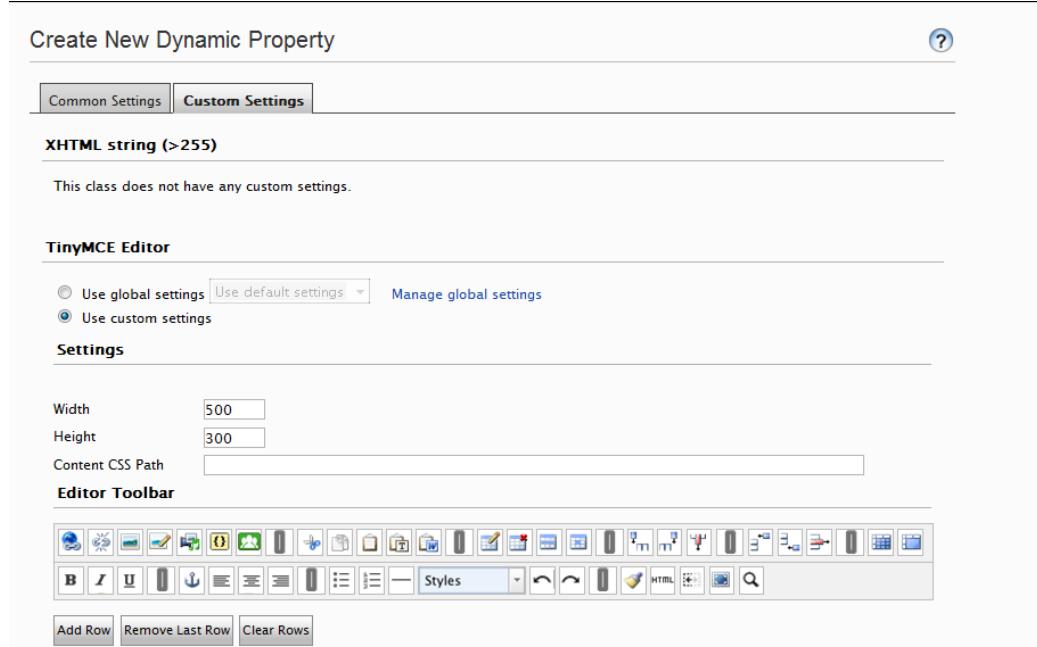
You can adapt the rich-text editor to suit different groups of editors through the availability of different buttons. You also can change the size of the rich-text editor dialog. To change these settings, first configure the property to use property **XHTML String (>255)** type. This enables the fields in the **Custom Settings** tab.

You use two kinds of settings to change the editor's layout and buttons: **global settings** and **custom settings**. You configure the layout of the editor toolbar the same way regardless of the type of setting.

Changing the layout of the editor

1. Enter the required width and height of the editor (in pixels) in the **Height** and **Width** fields.
2. If needed, change the path to the cascading style sheet (CSS) that is used in the editor with the **Content CSS Path** field.

3. Drag and drop icons that you want available from the editor toolbar designer to and from the **Inactive tools** section.
4. Remove an icon by dragging it from the toolbar designer and dropping it in the **Inactive tools** section. The icon is automatically placed in the category to which it belongs.
5. Add an icon to the editor by dragging it from the **Inactive tools** section to the desired position in the toolbar designer.
6. Add and remove rows from the editor by clicking **Add Row** and **Remove Last Row**. The easiest way to clear all the icons from the toolbar designer and start from scratch is by clicking **Clear Rows**.
7. Configure the editor plug-ins and click **Save**.



In the lower part of the **Create New/Edit Property** dialog, you can choose whether to use an advanced image or link dialog box. You also can turn on the word count in the editor, and specify if you want to use the Episerver CMS file selection dialog box. By default, the advanced image dialog box is used with the Episerver CMS file selection dialog box.

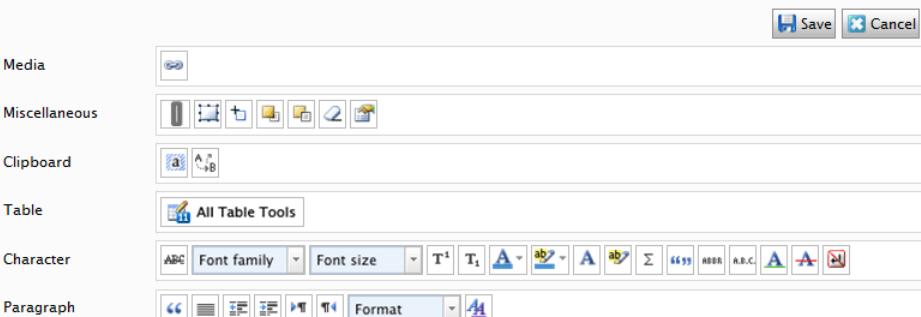
Inactive tools

Plugins without a button

Change image dialog to Advanced image dialog
 Change list buttons to advanced list buttons
 Use EPiServer CMS file selection dialog [EPiServer]
 Wordcount
 Change link dialog to Advanced link dialog

Always enabled plugins

- EPiServer Window Manager for dialogs
- Enable/disable editor [EPiServer]
- Remove accesskey attributes for editor [EPiServer]
- Removal of toolbar and content size dependency [EPiServer]
- Enhanced visual aid [EPiServer]
- Enable drag and drop from file manager [EPiServer]
- Checks if changes have been made in the Editor when leaving page [EPiServer]
- Search/replace modified to function with Dynamic Content [EPiServer]
- Style matcher improvement for the Editor [EPiServer]
- Add p tag last in the Editor to enable the cursor to be set at the end of the document [EPiServer]



Enabling plug-ins

Some editor plug-ins are enabled always in a standard installation of Episerver CMS. These are configured in the Plug-in Manager on the **Config** tab in admin view.

- » **Change list buttons to advanced list buttons** enables a drop-down list with advanced types for nested lists, such as square, lower alpha, and lower roman.
- » **Change image dialog to Advanced image dialog** enables an advanced Add/Edit Image dialog box. Select this check box to configure advanced properties for your images.
- » **Word count** enables word count functionality. Select this option to add a **Words** field to the bottom right of the editor. This displays the number of words included in the editor area.

Configuring global and custom settings

Global settings let you change the layout and the buttons in the rich-text editor toolbar for a property. You can use global settings on all page types as a default, or on only one page type. You can have as many global settings as you like on your website to create an editor suitable for all editors working with the website. You also can apply custom changes for a specific page type.

Configuring global settings for the XHTML String (>255) property

When you apply a global setting to all properties based on the **XHTML String (>255)** property type, all the editors on the website using a global setting are based on this, unless otherwise stated that a editor should be based on another global setting or a custom setting.

1. On the **Page Type** tab, select **Edit Custom Property Types** and click **Add Setting**.
2. Enter a descriptive name for the global setting.
3. Change the layout of the rich-text editor, configure the plug-ins, and click **Save**. The global setting appears in a list.



Click **Set as Default** for one setting to use it for all the editor toolbars on the website, unless another setting is chosen for the property in a certain page type. If you do not configure a global setting as default, the properties use the standard toolbar set at installation.

Configuring global settings for a property on a page type

You can configure a global setting for a specific property on a specific page type.

1. Open the page type for which you want to change the global settings on the **Page Type** tab in admin view.
2. Click the property you want to configure and select the **Custom Settings** tab.
3. Select the **Use global settings** check box and select **Use default settings** if you want to use the default settings for the property.
4. Create a new global setting for the property by clicking **Manage global settings**.
5. Add a global setting by following the instructions on how to **Configuring global settings for the XHTML String (>255) property**.
6. Change the layout of the rich-text editor, configure the plug-ins, and click **Save**.
7. Change the global setting in the drop-down list and click **Save**.

Configuring custom settings

Use custom settings to change the layout and the buttons in the rich-text editor toolbar **for this property on this page type only**.

Configure a custom setting as follows:

1. On the **Custom Settings** tab, select the **Use custom settings** radio button.
2. Change the layout of the rich-text editor, configure the plug-ins and click **Save**.

Deleting a global setting

To delete a global setting, open the setting and click **Delete**.

Content types

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

Content types and properties

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

[AlloyTech] Standard page



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

Information	
From code	Yes
Name	StandardPage
Display name	[AlloyTech] Standard page
<input type="button" value="Settings"/>	

+ Add Property

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

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

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

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

You can define page types either in code or from the admin view. On the other hand, you can define clock types only in code. For page types defined in code and for all block types, you can define “non-breaking changes” of properties in admin view.

You are notified if you cannot change the settings defined in code in admin view. If you make changes to a page type defined in code, you can reset the changes to the original values defined in code.

Page types



Be careful when you alter page type settings because changes may cause the website to stop working. Although you can create page types in admin view, you should create them from code.

Editing a page type

Edit "Standard Page"

Edit the basic information about the page type.

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

General

From code	Yes
Name	StandardPage
Display name	<input type="text"/>
Description	<input type="text"/>
Sort index	0
<input checked="" type="checkbox"/> Available in edit view	

Display Template

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

Advanced

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

Access level

Create	<input checked="" type="checkbox"/>
Everyone	<input checked="" type="checkbox"/>
<input type="button" value="Add Users/Groups"/>	

Buttons

To edit settings for an existing page type, open the page type on the **Page Type** tab, click **Settings**, change the settings, and click **Save**.

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



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

Creating a page type from admin view

Create a page type from the admin view as follows:

1. On the **Page Type** tab, select **Create New Page Type**.
2. Under the **Information** tab, enter the following information:

Field	Description
Name	Enter the name of the page type here.
Display name	Enter the name that will be displayed in the list of available page types.
Description	The text describing the page type, will be displayed in the list of available page types.
Sort index	Determines the sorting (ascending sort order) in the list of available page types in edit view; default is 100.
Available in edit view	This option makes the page type available for selection when creating new pages in the editorial interface. You should hide page types that are rarely used by editors, for instance the start page type. You can make these available when needed, and then hide them again.
Display Template	Select one of the following templates to be used for the page type: <ul style="list-style-type: none"> » Web Form template path. Enter a path to the aspx page template file to be used to display the content of the page. » Web form template. Select a specific Web Forms template that the page type is associated with. If your developer created several templates using type classes, these appear in the list. » MVC template. Select a specific MVC template with which the page type is associated. If your developer created several templates using type classes, they appear in the list.
Registered template	Select to use registered page templates for displaying content. The registered page templates are available for selection in the drop-down list. A page type then can be associated with predefined page templates to display the same

Field	Description
	content using different channels.
Advanced information	Displays information about the GUID, class name and assembly name for the page type.
Access level	<p>Determines the users and user groups for which the page type is available when creating new pages. The default setting is Everyone, meaning that it will be available to all users and groups. Do the following to limit access rights for a page type:</p> <ol style="list-style-type: none"> 1. Click the Create check box to clear the access level setting for Everyone. 2. Click Add users/Groups and select the relevant users or groups. Click OK when done. 3. Make sure that the Create check box is selected for the desired users and groups and click Save.

3. Click **Save**, or **Revert to Default** if you want to restore your settings.
4. Go to the **Default Values** tab. You can set default values for some of the built-in properties in Episerver CMS from admin view. You also can specify default values for the properties from code, but these are not visible in the admin view.

Edit "Standard Page" ?

Edit the basic information about the page type.

Information Default Values Available Page Types

<p>Start Publish Date <input type="text" value="1"/> minute <input type="button" value="▼"/></p> <p>Set "Start publish date" relative to when the page has been created</p> <p>Stop Publish Date <input type="text"/> minute <input type="button" value="▼"/></p> <p>Set "Stop publish date" relative to when the page has been created</p> <p>Sort index <input type="text"/></p> <p>Sort subpages <input type="button" value="According to creation date (latest first) ▾"/></p> <p>Archive to <input type="text"/> ...</p> <p>Target Frame <input type="button" value="Open the link in a new window ▾"/></p>	<p><input checked="" type="checkbox"/> Use adjusted default settings for pages using this page type</p>
--	---

Save Revert to Default Cancel

5. Change the following properties default values then click **Save**, (or **Revert to Default** if you want to restore your settings.)

Property	Description
Start Publish Date	Select the Use adjusted default settings... and the value in time when the system should publish the page after it has been created. Mostly used for news pages that are available on the website for a short time.
Stop Publish Date	Select the Use adjusted default settings... and the value in time when the system should stop the page from being published. Mostly used for news pages that are available on the website for a short time.
Display in navigation	Select this option if the page type, for example, a news item page that should never be displayed in menus for navigation. This is done by clearing the Display in navigation property, which is then the default value for this page type.
Sort index	
Sort subpages	Select how you want the pages to be sorted, according to creation date or other.
Archive to	Browse the path to where you want the pages archived. Then, you can run a scheduled job to clean up archived pages as described in Scheduled jobs .
Target frame	Select if the page should be opened in a new window or in the same window.

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

Edit "Standard Page"

Edit the basic information about the page type.

Use Default Settings
 All
 None
 Selected

Name	Description
[Specialized] Contact	
[Specialized] Container Page	
[News] Article	
[Default] Standard Page	
[Specialized] Search Page	
[Specialized] Start Page	
[Products] Product	
[Specialized] Landing Page	
[Default] News Page	
Root Page	Used as root/welcome page
Trash	Used as recycle bin for the website

7. Define the desired page type by selecting any of the following options:

Option	Description
Use Default Settings	Select to revert to default settings as defined in code for this page type.
All	You can create pages based on all page types available in edit view.
None	You cannot create child pages for this page type.
Selected	Manually select the page types that should be available.

8. Click **Save**, or **Revert to Default** if you want to restore your settings.

Copying an existing page type

When you copy a page type, all of its properties are also copied. You can then edit the information for the page type and its properties.

Copy a page type as follows:

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

Block types

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

The screenshot shows the configuration screen for the [AlloyTech] Text block. At the top, it displays the block's name and a help icon. Below this, a brief description states: "Simple block that displays a main heading and a XHTML text." The main configuration area is divided into tabs: "Information" (selected), "Content", "Behavior", and "Validation". Under "Information", the "Name" is set to "TextBlock" and the "Display name" is left empty. A "Settings" button is located in the bottom right corner of this section. Below the tabs, there is a table titled "Add Property" with two rows:

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

Editing a block type

Edit "Jumbotron"

General

Name	JumbotronBlock
Display name	<input type="text"/>
Description	<input type="text"/>
Sort index	<input type="text" value="0"/> <input checked="" type="checkbox"/> Available in edit view

Display Template

Web Form template	<input type="button" value="▼"/>
MVC template	<input type="button" value="▼"/>

Advanced

Guid	9fd1c860-7183-4122-8cd4-ff4c55e096f9
Class name	AlloyTemplates.Models.Blocks.JumbotronBlock, AlloyMvcTemplates, Version=9.4.0.0, Culture=neutral, PublicKeyToken=null

Access level

Create	<input checked="" type="checkbox"/> Everyone
<input type="button" value="Add Users/Groups"/>	

Edit the settings for an existing block type as follows:

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

Other content types

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

CMS

Converting pages

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

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



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

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

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

The screenshot shows the 'Convert Pages' dialog. At the top, it says 'Converts one or several pages in the tree structure from one page type to another page type.' A note below states 'Note! This operation is irreversible and content may be permanently removed.' Below this, there's a 'Select pages to convert' field containing 'About us [16]' with a browse button (...). A checked checkbox 'Convert the selected page and all subpages (of the selected page type)' is present. The main area has two dropdowns: 'Convert from Page Type' set to 'Standard Page' and 'Convert to Page Type' set to 'Contact'. Below these are two tables mapping properties:

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

At the bottom are 'Convert' and 'Test Conversion and Show Log' buttons.

2. Select a page in the **Select pages to convert** field.
3. Select the **Convert the selected page and all subpages (of the selected page type)** check box if you want all the subpages to be included in the conversion.
4. Select the page type that you want to convert **from** in the **Convert from Page Type** list. The list of page properties included in that page type updates in the **Convert from Property** list.
5. Select the page type that you want to convert **to** in the **Convert to Page Type** list. The list of page properties included in that page type updates in the **Convert to Property** list.
6. Map each page property to a corresponding property in the page type to which you want to convert.
7. Click **Convert**.

8. To test the conversion, click **Test Conversion and Show Log**, which displays a detailed log of converted pages and page properties.



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

Visitor groups

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

Built-in visitor group criteria

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

Visitor group criteria	Description
Site Criteria	<ul style="list-style-type: none"> » Number of Visits. Matches the number of times the visitor has visited the website. You can specify Less than, Equal, or More than, within a number of days (weeks, months or years), or since a date, or in total. For example, <i>Less than 1 [visit] within 10 days</i>. » User Profile. Matches a value stored in a user's profile. You can specify Last Name, First name, Company, Address, Title, or email address. Each item can be equal to, contained in, start with or end with the specified value. For example, <i>Company Equals ExampleCo</i>. See example. » Visited Category. Select one of the page categories on the website. You can also select how many different pages that use the specified category the visitors have visited. The visitor must have visited the specified number of pages that have the specified category set on it. For example, <i>Category X viewed at least 3 pages out of a total of 6</i>. » Visited Page. Select one specific page on the website. The visitor must have visited the specified page during the current session.
Time and Place Criteria	<ul style="list-style-type: none"> » Geographic Coordinate. Uses the visitor's approximate location in a geolocation database (based on the visitor's IP address). Drag the marker and drop it on the map (Google Maps), and select a radius around that point to match the visitor's location to the selected location. See example. » Geographic Location. Matches the visitor to a specific continent, country, and region. For example, <i>Continent: Europe, Country: Norway, Region: Oslo</i>. You also can specify a wild card for country and region. For example, <i>Country N* in Europe</i> yields

Visitor group criteria	Description
	<p>Netherlands and Norway. See example.</p> <ul style="list-style-type: none"> » Time of Day. Matches the visitor's time period with the start time, end time (15-minute intervals), and days you specify. For example, <i>From 2:00 PM to 4:15 PM on Monday, Tuesday, and Friday.</i>
URL Criteria	<ul style="list-style-type: none"> » Landing URL. Matches the URL with which the visitor enters the site. You can decide if the landing URL is equal, starts with, or ends with the with a specified value. For example, <i>contains www.example</i> to match <i>www.example.com</i>, <i>www.exampleURL.com</i> and so on. » Referrer. Matches the Host name or URL of the referred page that was clicked before entering the site, such as a search engine result page. You can decide if the referrer criteria should match on equal, contain, start with, or end with a specified value for the whole or parts of the Host name or URL. See example. » Search Keyword. Stores the URL of the referred page that was clicked before entering the site, such as the URL of a search engine result page. Your partner developer can define this criteria to specify the search word to match against the URL by a regular expression. The regular expression finds search words in the URL. Note: This criterion is not compatible with Google due to privacy restrictions for Google searches.
Visitor Groups.	<p>Visitor Group Membership. Select members from existing visitor groups. For example, <i>Member of Job Applicants</i>, or <i>Not a Member of Start Customer Club</i>.</p>
Episerver Forms	<ul style="list-style-type: none"> » Submitted Form. Matches when a visitor submits (or does not submit) a particular form that you select from a drop-down menu. For example, <i>Has Submitted Job Application</i>. See example. » Submitted Form Value. Matches when a visitor submit a particular form value. See example.

Managing visitor groups

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



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

Creating a visitor group

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

The screenshot shows the 'Edit Visitor Group' page in the Episerver CMS interface. The top navigation bar includes 'Dashboard', 'CMS' (which is selected), 'Add-ons', 'Edit', 'Admin', 'Reports', and 'Visitor Groups'. The main content area has a header 'Edit Visitor Group' with a help icon. Below it, a message says 'Adapt content on your website by first creating visitor groups and then using the groups to target the content on pages.' The 'Criteria' section contains a 'Match' dropdown set to 'All'. A 'Drop new criterion here' area is shown above a list of criteria. One criterion is selected: 'User Profile' with 'Title' set to 'Equals' and 'CTO'. To the right of the main area is a sidebar titled 'EPIServer forms' containing 'Site Criteria' (which is highlighted in blue), 'Number of Visits', 'User Profile', 'Visited Category', and 'Visited Page'. Below this are sections for 'Time and Place Criteria', 'URL Criteria', and 'Visitor Groups'. At the bottom are 'Save' and 'Cancel' buttons.

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

7. In **Security Role**, select the check box if you want this visitor group to be available when setting access rights for pages and files in admin view. Note that visitor groups only have read access.
8. In **Statistics**, keep the check box selected to enable statistics for the visitor group (this check box is selected by default).
9. Click **Save**.

Editing a visitor group

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

Name	Notes	Action
Alloy Track for free	Visitor who have visited pages that are categorized as Alloy Track more than 2 times.	
French visitors	Visitors from any part of France.	
Visitors from London	Visitors from Greater London.	

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



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

Copying a visitor group

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

Deleting a visitor group

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

Viewing and clearing statistics

The visitor group statistics appear as a gadget on the dashboard. Clear the statistics from the database as follows:

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



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

Examples of creating visitor groups

EXAMPLE: Site criteria and points

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

Edit Visitor Group ?

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

Criteria

Drop new criterion here

Number of Visits

 Match Points ▼

More than
1
Since
5/16/2016
2
p
 Required
X

Geographic Location

 Continent:
 Country:

 Region:
2
p
 Required
X

Threshold

1/4

Other Information

Name	<input type="text" value="From Sweden"/>
Notes	<p>This visitor group lets editors present relevant content to a particular geographical area. The group can be as broad as "by continent," can be narrowed to a particular country, and even to a specific region, state, or province.</p> <p>In this group, content is targeted at website visitors from Sweden.</p>
Security role	<input checked="" type="checkbox"/> Make this visitor group available when setting access rights for pages and files
Statistics	<input checked="" type="checkbox"/> Enable statistics for this visitor group

Capture screenshot.
Save
Cancel

EPiServer forms

Submitted form

Submitted form value

Site Criteria

Time and Place Criteria

URL Criteria

Visitor Groups

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

The screenshot shows a configuration dialog for the 'Number of Visits' criterion. It includes dropdown menus for 'More than', a value input of '1', and a date range from 'Since 5/16/2016'. Below these, there's a section for points labeled '2 p' with a checked 'Required' checkbox.

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

EXAMPLE: Geographic location

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

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

The screenshot shows a configuration dialog for the 'Geographic Location' criterion. It includes dropdown menus for 'Continent: Europe', 'Country: Sweden', and 'Region: Any'. A points section shows '2 p' and a checked 'Required' checkbox.

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

EXAMPLE: Geographic coordinate

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

1. Drag and drop the **Geographic Coordinate** criteria, and click **Select Location**.
2. Click **Select location** to display a map that you click to set a location. You can zoom in the map for more precise locations.

3. Select the **Radius [number of kilometers or miles]**.

4. Click **Save**.

EXAMPLE: Referrer

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

- » search for “episerver and cms” on Google.com
- » from the search result page, click the Episerver landing page link

1. Drag and drop the **Referrer** criteria, and select **URL > Equals** > the URL of the search engine result page, for example,

<http://www.google.se/#hl=sv&source=hp&biw=1338&bih=790&q=episerver+cms>.

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

3. Click **Save**.

EXAMPLE: Form and form values

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

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

Additional visitor group criteria

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

Commerce Episerver Commerce criteria

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

Addons Episerver Visitor Group Criteria Pack

- » **Display Channel** matches the visitor's current display channel when visiting the website, such as distinguishing between web and mobile visitors.
- » **IP Range** matches the IP range either equal to, below, or above a defined IP number the visitor used when visiting the website.
- » **OS & Browser** matches the operating system and browser the visitor used when visiting the website.
- » **Role** matches the access roles the visitor had when visiting the website. You can either include roles by using the **In role** condition, or exclude roles by **Not in role**.

Addons Episerver Marketing Automation

Visitor group criteria specifically designed for marketing automation.

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