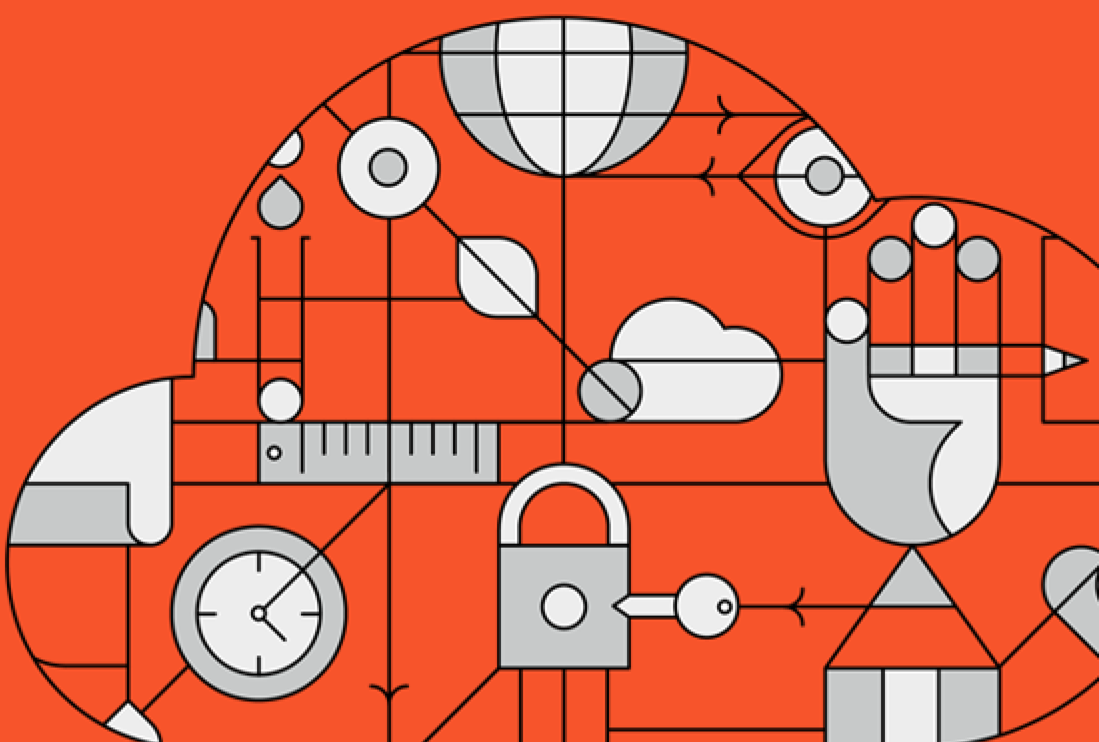
Episerver CMS

Editor User Guide



Digital Experience Delivered.™

Episerver CMS Editor User Guide 16-5

Release date 2016-07-12

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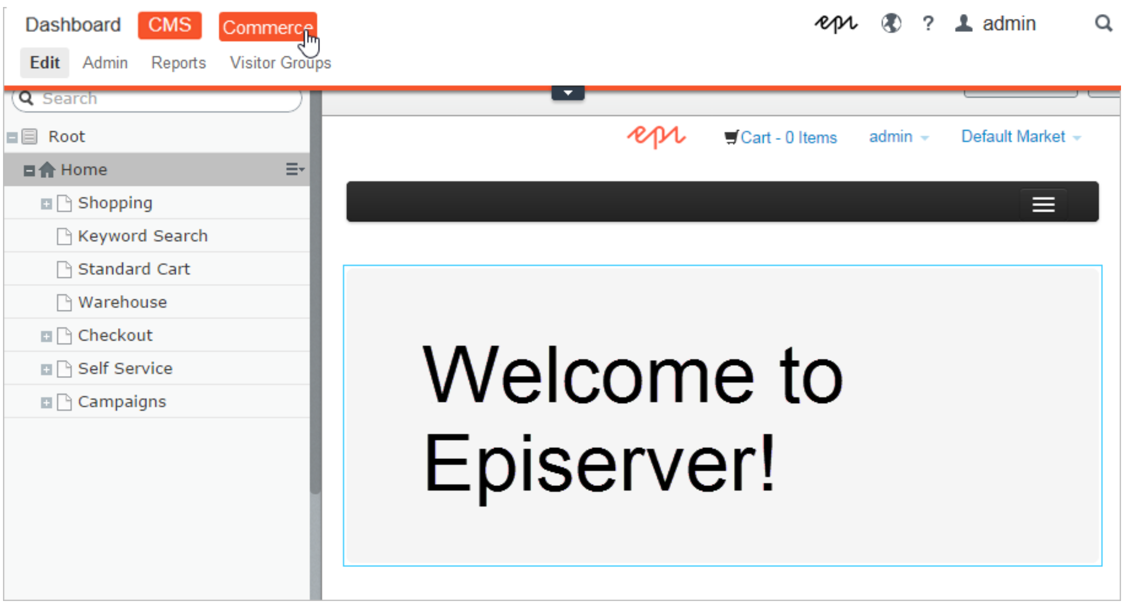
Introduction

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.

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

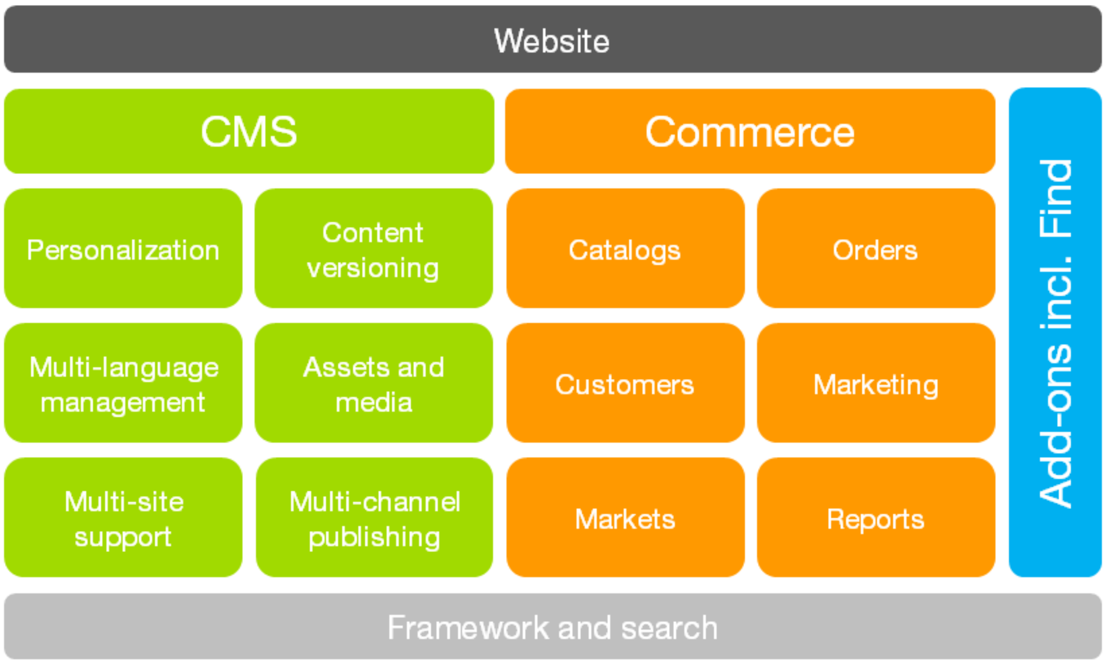
Due to frequent feature releases, this user guide may describe functionality that is not yet available on your website. Refer to What's new to find out in which area and release a specific feature became available.

Copyright notice

About Episerver

The base of the Episerver platform is the CMS (Content Management System) with its core features for online content creation, publishing, and website management. The platform can be extended with Episerver Commerce for managing e-commerce tasks, and Episerver Find for building advanced search features, as well as a broad selection of other add-ons from both Episerver and third-parties.

Features



CMS

Episerver CMS is a powerful yet easy to use web content management platform, based on cutting edge technology. The intuitive user interface and superior usability of Episerver CMS allow both experienced and occasional users to efficiently manage website content. Refer to the Managing content section in the CMS Editor user guide for more information on how to work with CMS features.

Commerce

Adding Episerver Commerce to your CMS solution brings e-commerce functionality such as catalog, customer and order management, combining the powerful content publishing and display features of CMS with advanced back-end online store management. Refer to the Commerce user guide for more information about Episerver Commerce features.

Add-ons

There are many add-ons available for extending your Episerver solution. The add-ons from Episerver described in this documentation add features such as advanced search, Google Analytics and social media integrations. Refer to the Add-ons section in the online help for more information about Episerver add-ons.

Refer to Introduction and What's new for information about licenses and recent features.

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	» 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	» 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.

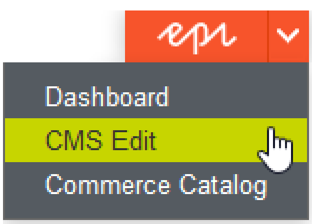
Logging in

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

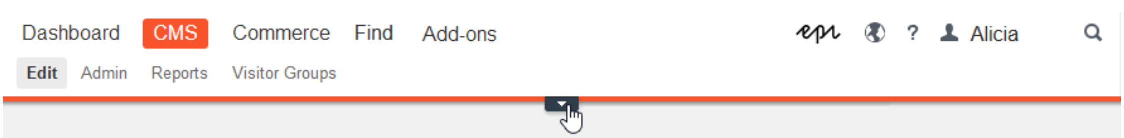
What you are allowed to do after logging in depends on your implementation and your access rights, since these control the options you see. When logged in, the Episerver quick access menu is displayed in the upper right corner.

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

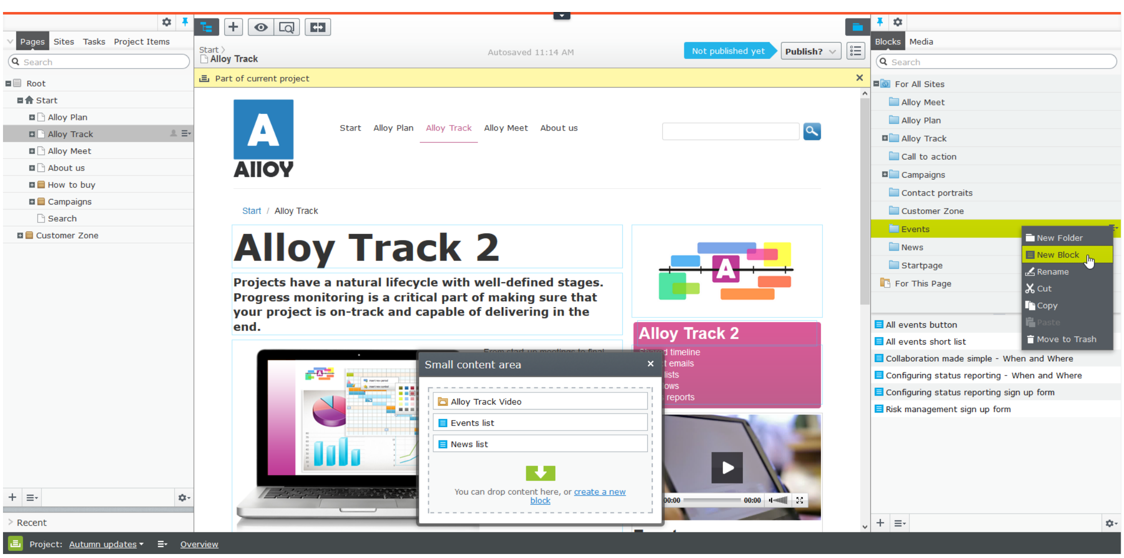
Refer to the sections below for more information.

- 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.

User interface

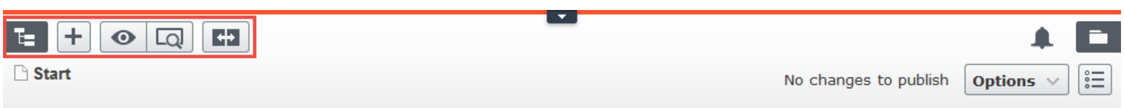
> The Episerver user interface is flexible allowing developers to plug-in customized features when implementing websites. This description refers to a “standard installation” of Episerver without customizations.

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

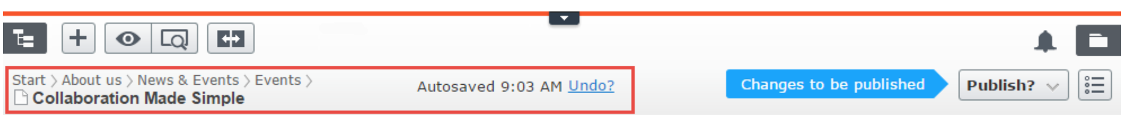


The **global menu** provides access to other areas of the Episerver platform. You can also access this user guide, your user settings and a global search from the global menu. Note that you in some areas need to pull down the global menu with the arrow.

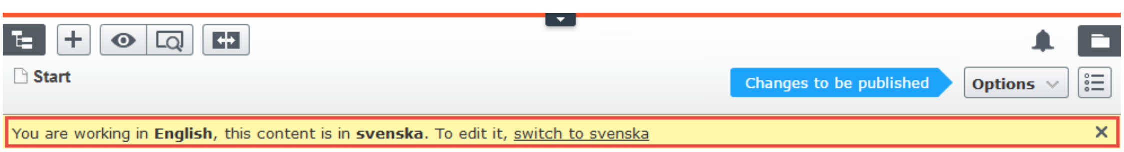
The toolbar contains features like preview and view options, and lets you add items such as pages or blocks.



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



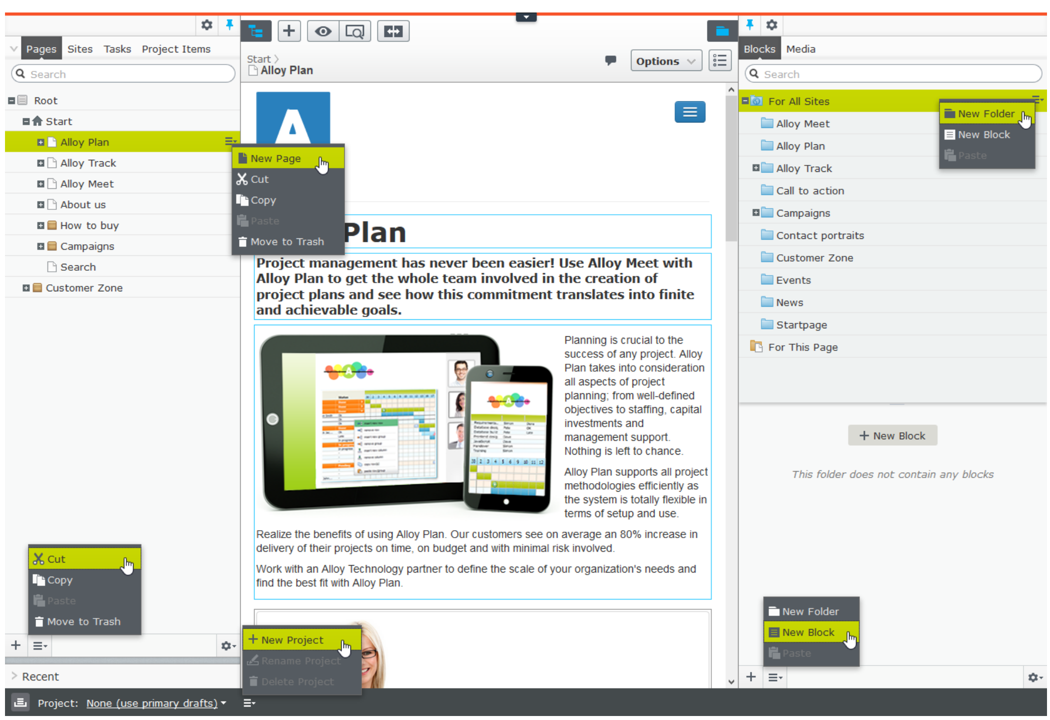
A notification toolbar may be displayed below the toolbar showing confirmation and error messages and such.



General features

- **Context-sensitive actions**. Some features are only available in certain context. The toolbar, for instance, presents relevant actions depending on what you are currently doing, and the add (+) button also offers context-sensitive options.
- **Primary actions**. Some actions open in a new window, for example, a page delete confirmation. The background is then dimmed, meaning that you must finish the primary action to continue.

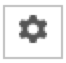
- **Action feedback and notifications.** Successful actions are confirmed by a message in the notification bar. A notification may also appear in case of an error requiring you to take action.
- **Drag-and-drop operations**. Drag-and-drop is supported in many areas. For instance, you can drag pages, media files and blocks into the rich-text area or content areas, or re-arrange the page tree structure using drag-and-drop.
- **Tooltips**. Hover the mouse over a button or field and a short tooltip is displayed.
- **Keyboard commands**. Standard keyboard commands are supported in many areas, for instance, when moving pages in the page tree or in the rich-text editor.
- **Search**. Supported in many areas to locate, for instance, pages in the page tree or media in the folder structure.
- **Adaptable work environment**. Resize and pin the panes depending on what you are currently doing, and add and remove gadgets of your choice for quick access to functionality.
- **Support for time zones**. Publishing actions in the edit view are done in your local time zone, whereas administrative actions are based on server time.
- **Context menus** are available in many areas, for instance, in the panes, the page tree and in item listings. The menu displays different available options depending on where in the interface you are and what you are doing.



Panes

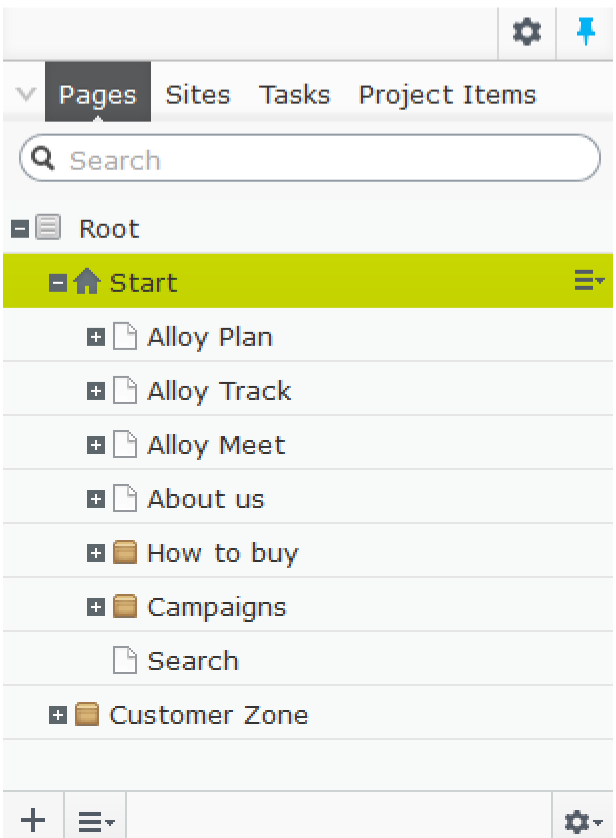
The user interface has a left-hand and a right-hand pane, which can be adjusted and extended with additional gadgets.

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

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

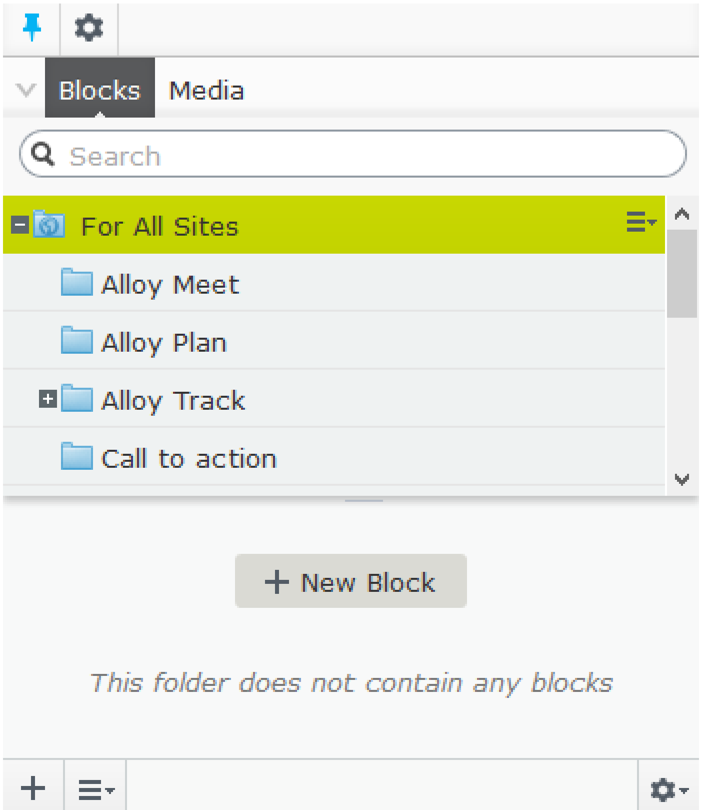
Left-hand navigation pane

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



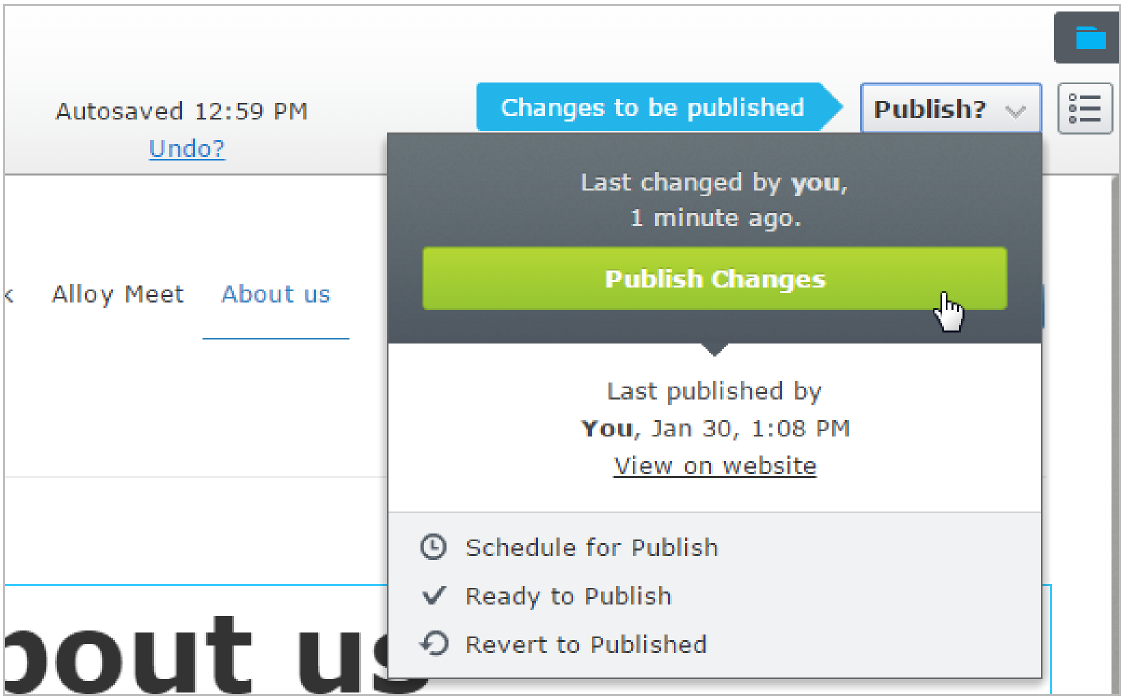
Right-hand assets pane

Contains the Media and Blocks folder structures by default, for easy access to drag items into the content you are currently working with.



Editing

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



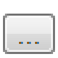
When working with content such as pages and blocks in CMS, or catalog content in Commerce, there are two editing views, **On-Page Editing** and **All Properties**, with toggle buttons to switch between them.

 On-Page Editing provides quick access to direct editing of a selection of content properties.

 All Properties provides access to all available properties including more advanced ones such as access rights and language settings.

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

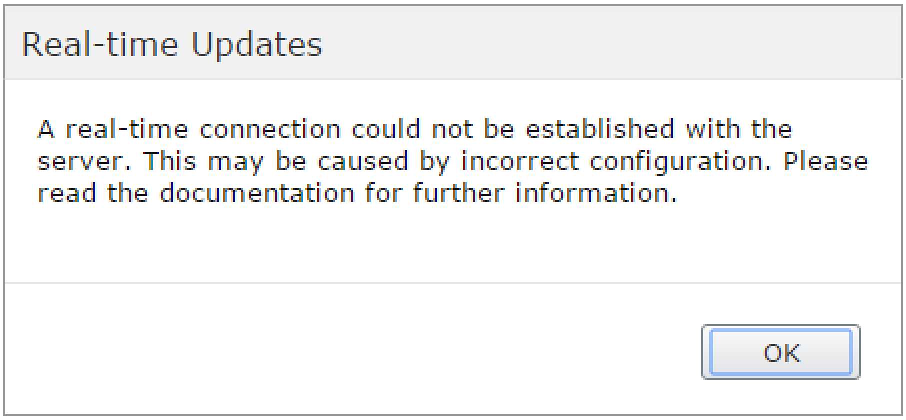
 Click to select, for instance, a category.

 Click to select, for instance, an image in a media folder, or a page in the page tree.

 Click to remove, for instance, a category.

Real-time Updates

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



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

Network problems

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

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

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

WebSocket support

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

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

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

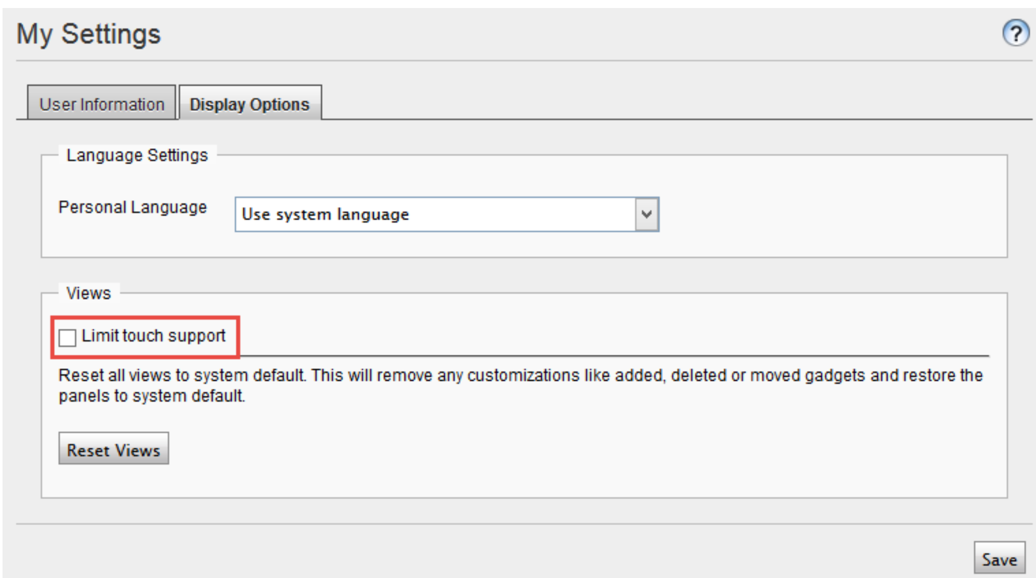
Depending on the system configuration when the WebSocket protocol is disabled, you may or may not see the *Real-time Updates* dialog box.

My settings

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

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

- **Personal language**. Select your desired user interface language from the drop-down. This settings affects the language of the user interface, such as texts in buttons and dialog boxes. It does not affect the language of your website.
- **Limit touch support**. On touch-screen devices, browsers may have difficulties prioritizing between input from the screen and from the mouse, which may cause problems such as making it impossible to resize panes using the mouse. If you experience problems with Episerver and the touch screen, enable the **Limit touch support** feature. This feature prioritizes mouse input over touch screen input and enables the mouse for interactions such as drag and drop, resizing of panes, and so on.



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

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.

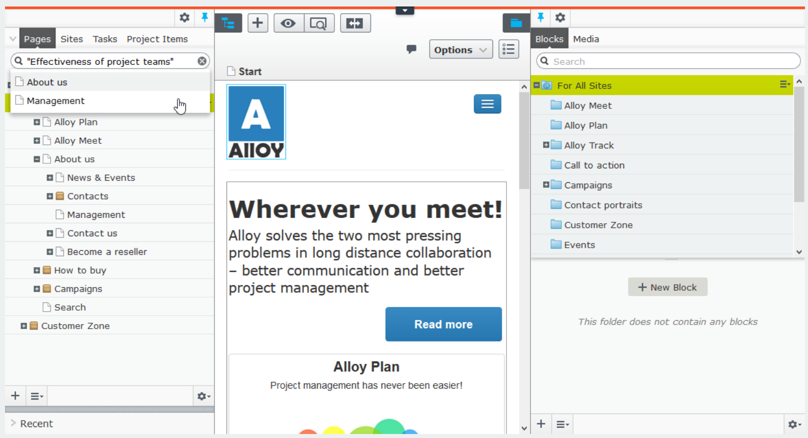
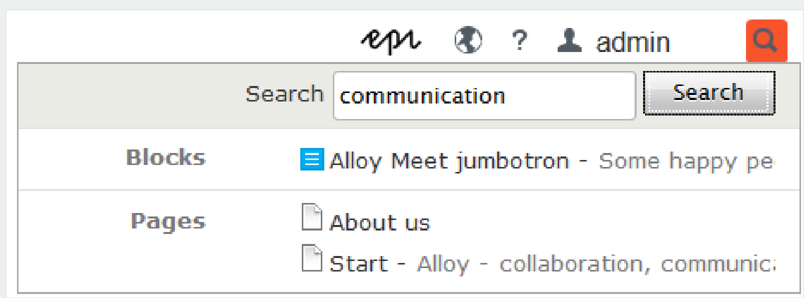
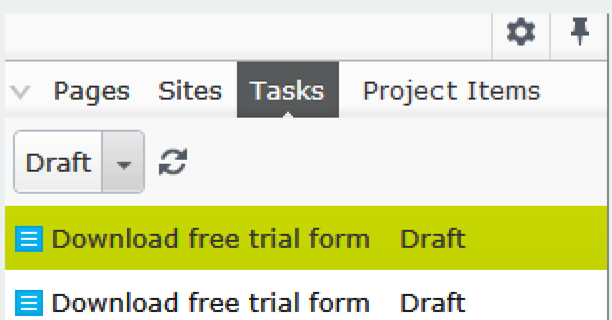
Developer

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 Finding content

Follow these tips to find Episerver content within edit view.

What you know	Action
Content location within page, asset or block structure	Use the page tree structure or the blocks and media assets pane and select content.
Content location on the website	Use the preview option, navigate to the content on the website.
Content is associated with a project	Use the projects gadget or, if you are using the projects feature, the project overview or the project items navigation pane.
Text within content title or body	Use either the global search in the global menu or the search fields at the top of the navigation and assets panes. » The global search can search all types of content on the website (depending on the configured search provider).

What you know	Action
	» Search fields in navigation and assets panes search for content in respective pane and related dialogs. See Search for search tips.  
A page's status (for example, draft)	Use the **Tasks** tab to find all content in that status. 
Content was edited recently	Use the *Recently changed* status in the Tasks tab or the **Recent** gadget. See Managing gadgets for information about adding this gadget.

CMS Managing content

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

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

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

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

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

Commerce Commerce-related content

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

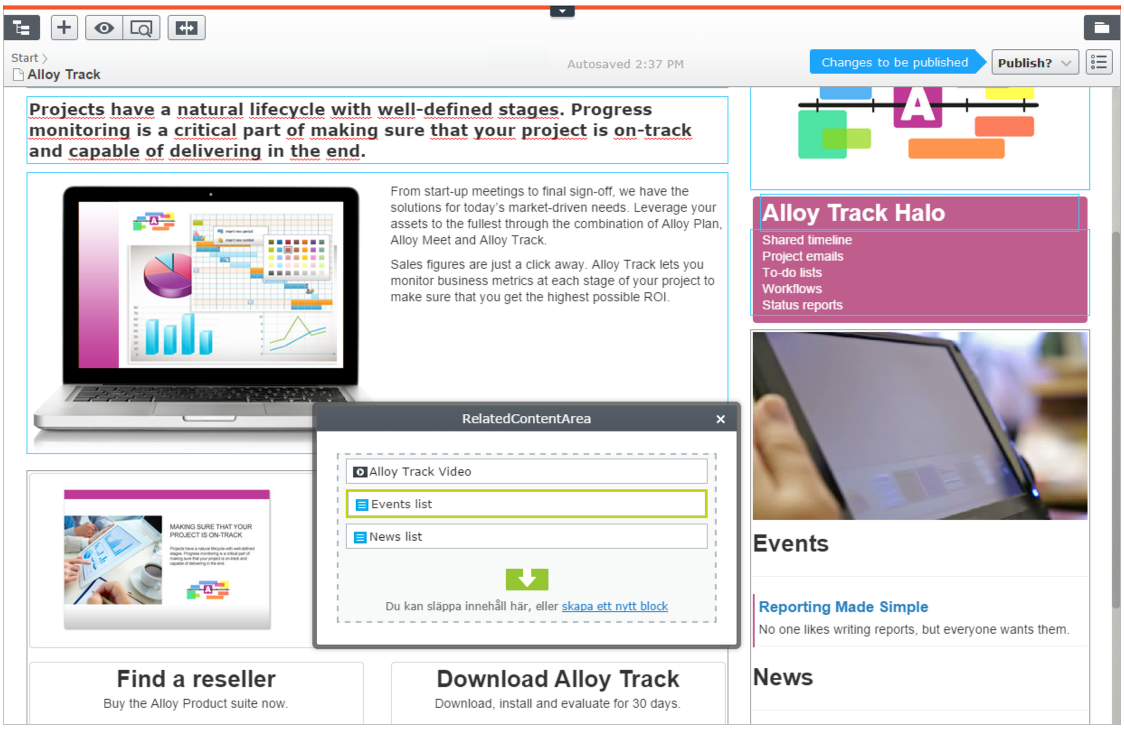
Addons Optimizing content to improve search

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

CMS Working in On-page edit view

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

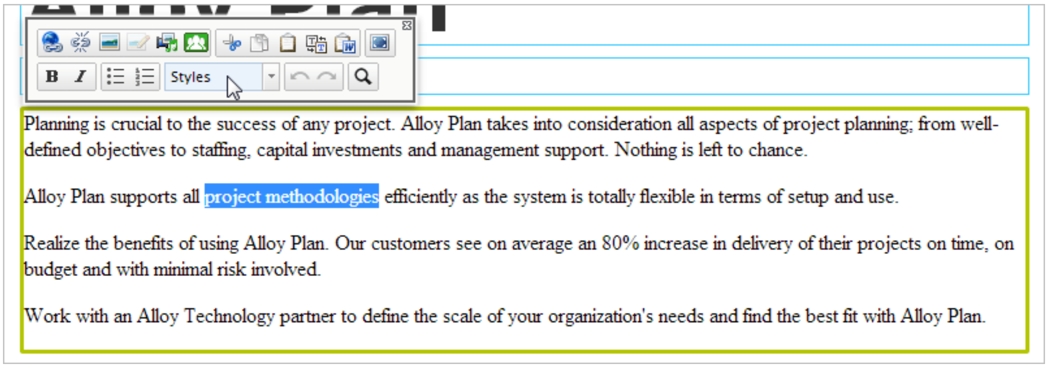
Areas and properties available for editing are implementation-specific, and depend on the type of property and how the rendering is built on your website.



EXAMPLE: Editing a page through on-page edit

Here we describe how to edit a page, but the procedure is similar when editing, for instance, blocks or catalog content if you have Commerce installed.

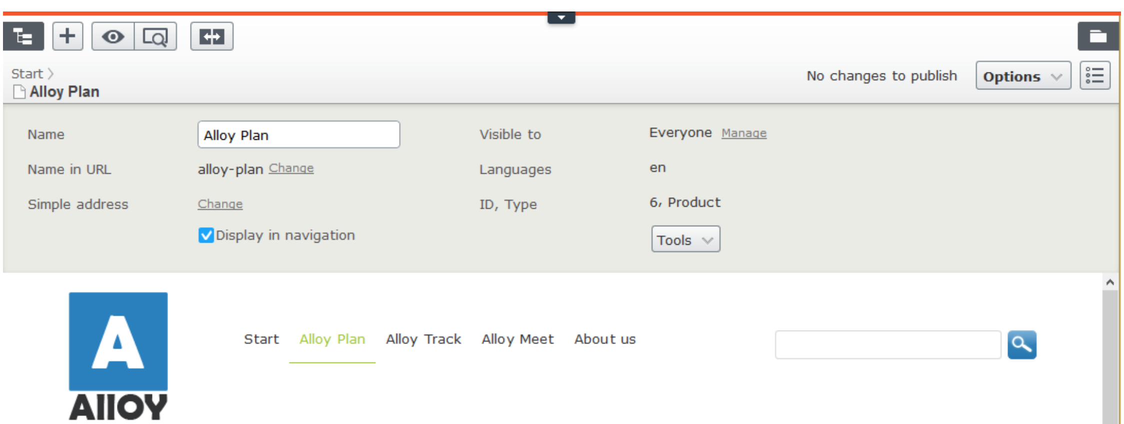
1. Select the page to edit from the page tree in the navigation pane.
2. Click an area to edit (property names will be displayed on mouse-over).
3. Make your changes by updating the content properties as needed. Refer to Using the rich-text editor for information on how to add and edit text in this type of property.



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

Editing additional properties

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



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

CMS Working in All properties editing view

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

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

Global properties

If you have content in multiple languages on your website, some properties may be locked for editing in a specific language. These properties are “globally shared” and you can edit them only in the master language. See Translating content.

Basic info properties

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

Property	Description
Name	The name of the page. Depending on the implementation, this may be the heading of the page, and it is also shown in the page tree structure and menus.
Name in URL	The page URL is automatically created based on the name of the page and its place in the navigation. It depends on the implementation if this is visible in links on the website. If you copy a page, the URL of the original page is copied with a number added to it. Change this if you create new content based on existing page copies. Changing the URL for an existing page may cause broken links.
Simple address	This is a unique URL that can be added to frequently requested pages on your website, letting visitors locate the page simply by typing the simple address name directly after the main URL of the website. Providing, for example, *products* as a simple address lets you find the page just by entering the URL (for example, *http://www.company.com/products*) in the address bar of the browser even if the Products page is located further down in the navigation tree. You can use the Simple address report to manage

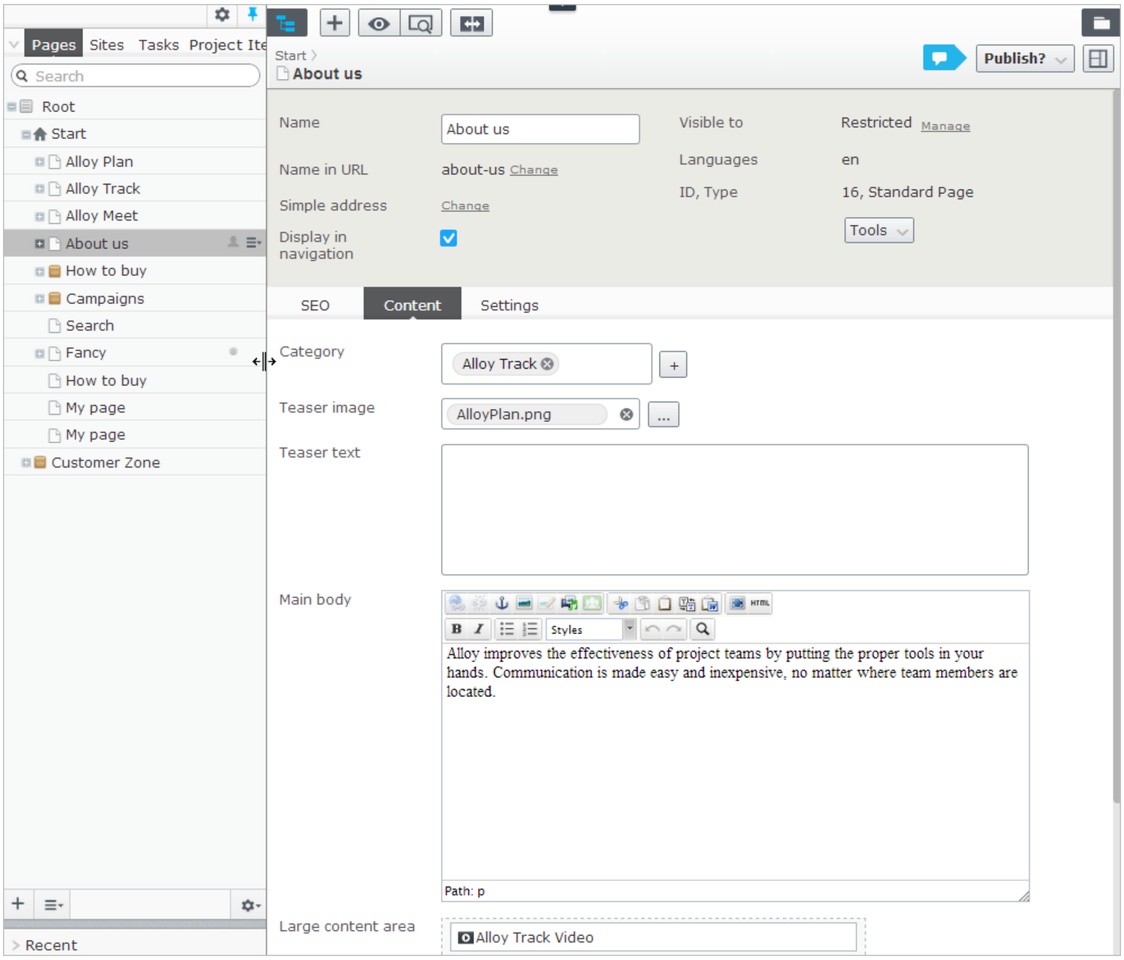
Property	Description
	simple addresses for your website.
Display in navigation	Deselect this option for pages that you do not want to be visible in navigation structures or menus on the website.
Visible to	Indicates if public access to the content is restricted. Click **Manage** to change these settings as described in Setting access rights from edit view.
Languages	Shows available languages for the content. If you have multiple languages on your website, see Managing multiple languages.
ID, Type	Shows the unique ID set by the system and the type of content on which the content is based.

Tabs

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

Content tab

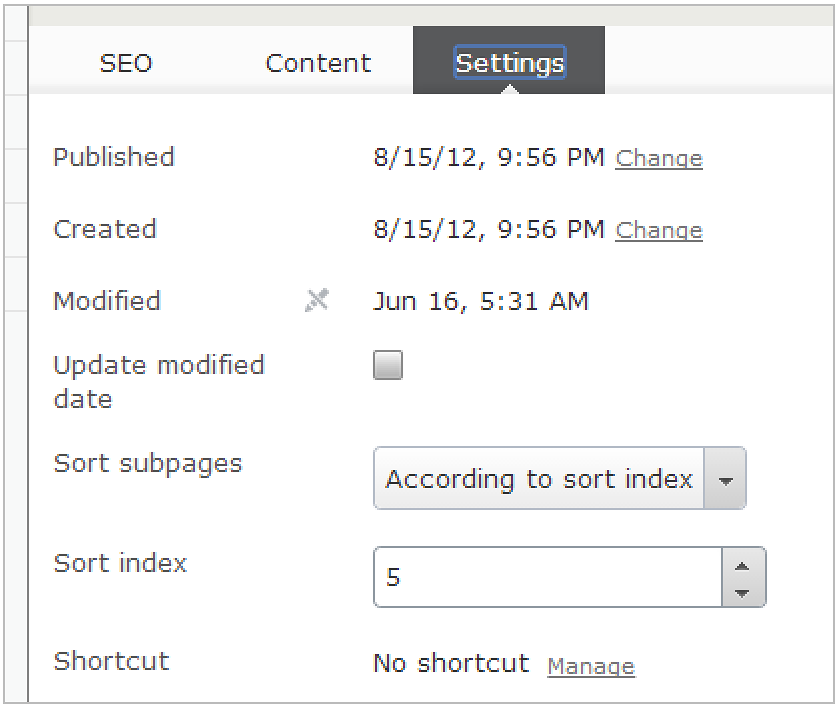
The Content tab contains properties for entering the main content, when editing a page or a block in CMS, or catalog content if you have Episerver Commerce installed.



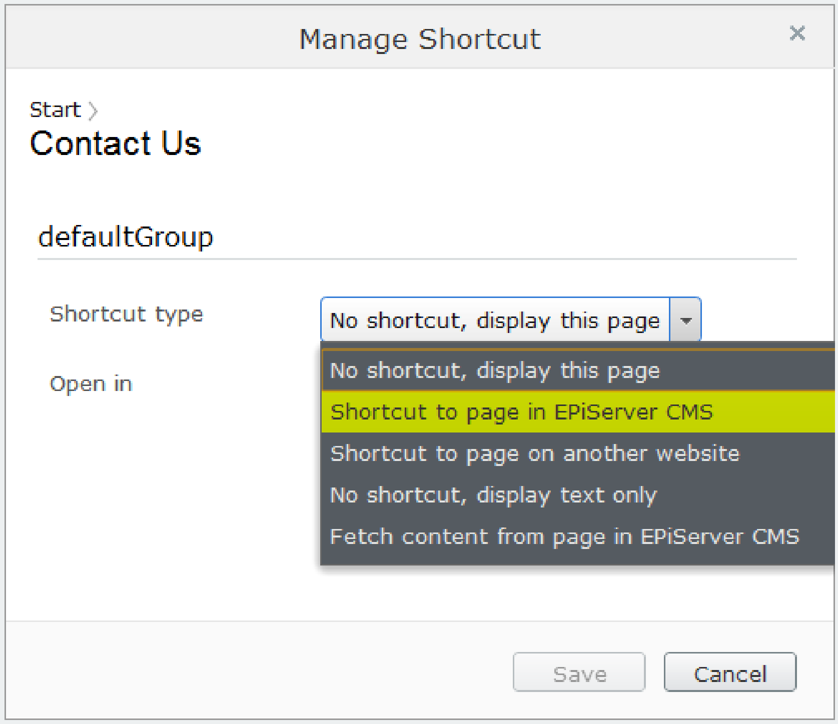
Property	Description
Category	Categorization of content is useful in filtering functionality for search, navigation and listings. You create a category in the administrative interface before you can apply it to content in edit view. **Note:** A category is a built-in property in Episerver CMS. You can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

Settings tab

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



Property	Description
Published, **Created** and **Modified**	System-generated timestamps for the content that rarely need to be changed.
Update modified date	Select this check box if you have made significant changes to the content and want the system to update the modification date and include the content once more, such as in a subscription send-out.
Sort subpages and **sort index**	Defines the sort order for pages in the page tree structure and navigation menus. See Structuring the website for information about structuring a website.
Shortcut	Creates menu or navigation links. A shortcut will not display any content of its own, instead it becomes a menu option linking directly to some other content on the same website or on an external website. Click **Manage** to add a shortcut for the page.

<table>
<tr><th>Property</th><th>Description</th></tr>
<tr><td></td><td>


The following shortcut types are available:

- **No shortcut**. Creates a link that displays the content you have created. By selecting this, you can also reset the page after using other types of links.
- **Shortcut to page in Episerver CMS**. Links to another page on the same website. A visitor who clicks this link is transferred to the page you have linked to, and kept within the same navigation menu structure.
- **Shortcut to page on another website**. Creates a link to an external page or to a document on the server. Include the entire URL address, including *http://*.
- **No shortcut, display text only**. Creates a heading with no link in the menu, without displaying any information or link to another page.
- **Fetch content from page in Episerver CMS**. Creates a link to another page from which content is retrieved into the original page within the same navigation structure. Useful when re-using content on the website, in which case you only need to maintain it in one place.
</td></tr>
</table>

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

Commerce **Commerce-related content**

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

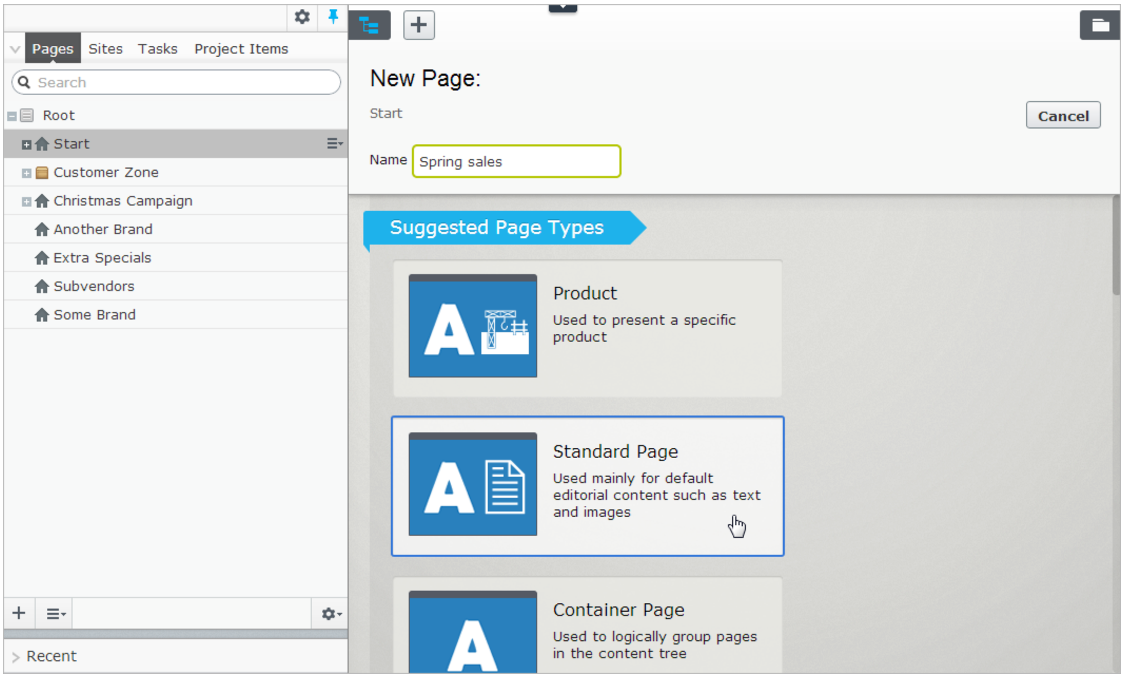
CMS Creating content

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

Creating a page

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

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



Creating a block

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

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

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

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

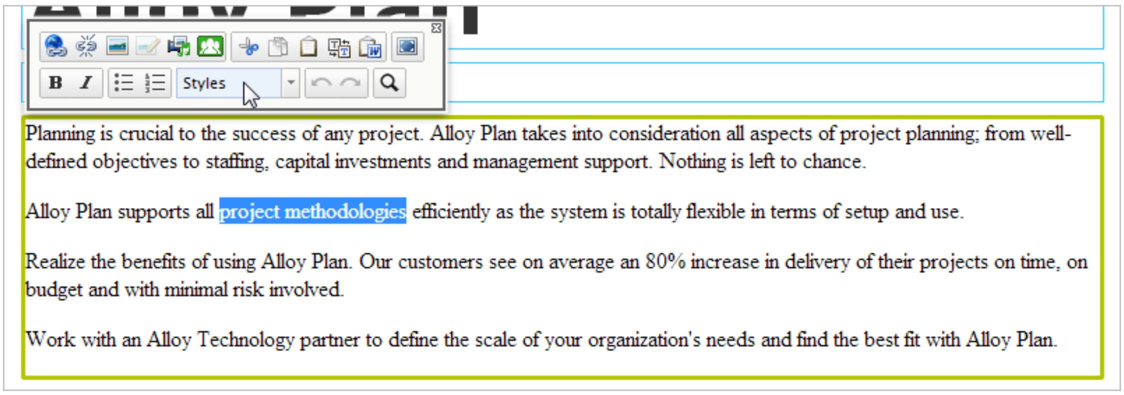
Commerce Commerce-related content

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

CMS

Editing content using the rich-text editor

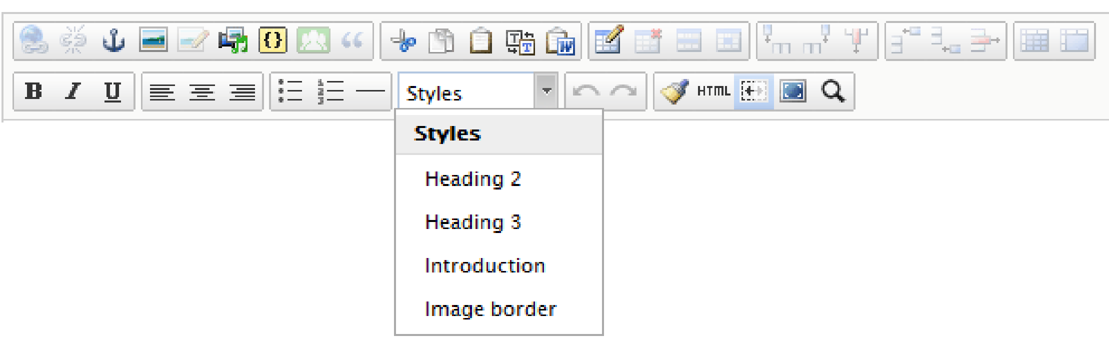
The **TinyMCE rich-text editor** is a property where you can enter information such as text with formatting, images, tables and links to other content. The rich-text editor is used for both pages and blocks in Episerver CMS, and for catalog content if you have Episerver Commerce installed.



The Episerver sample templates come with a selection of activated editor functions (buttons). You can activate additional buttons from the administration view. You can drag and drop blocks into the editor area, and pages from the page tree to create links. Spell checking is available either from the browser you are using, or through the Spell checker add-on from Episerver.

Formatting

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



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

Copying and pasting

When you copy and paste text from external sources, you want to avoid including undesired formatting tags. You should work with plain text, or only use the **Copy from Word** option when copying from properly formatted Word documents.

Toggle paste as rich or plain text pastes the text as rich text by default; toggle to paste as plain text. Use keys Ctrl+v or Cmd+v to paste the text. Then use predefined styles to format the text as desired.

Paste from Word keeps the formatting from the Word document. Use keys Ctrl+v or Cmd+v to paste the content into the Paste from Word window, and click **Insert** to insert the content into the page.

To transform the text formatting from Word into the website's style, the headings and body text must be formatted using available template styles in Word. When you copy and paste text from Word, a "heading 2" in Word is converted into the "heading 2" using the website styles.

Keyboard shortcuts

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

Command	Shortcut keys
Select all	Ctrl+a or Cmd+a
Undo	Ctrl+z or Cmd+z
Redo	Ctrl+y or Cmd+z
Bold	Ctrl+b or Cmd+b
Italic	Ctrl+i or Cmd+i
Underline	Ctrl+u or Cmd+u
Copy	Ctrl+c or Cmd+c
Cut	Ctrl+x or Cmd+x
Paste	Ctrl+v or Cmd+v
H1–H6 headings	Ctrl+1–6 or Cmd+1–6
Paragraph break	Enter or Control+o
Line break	Shift+Enter

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

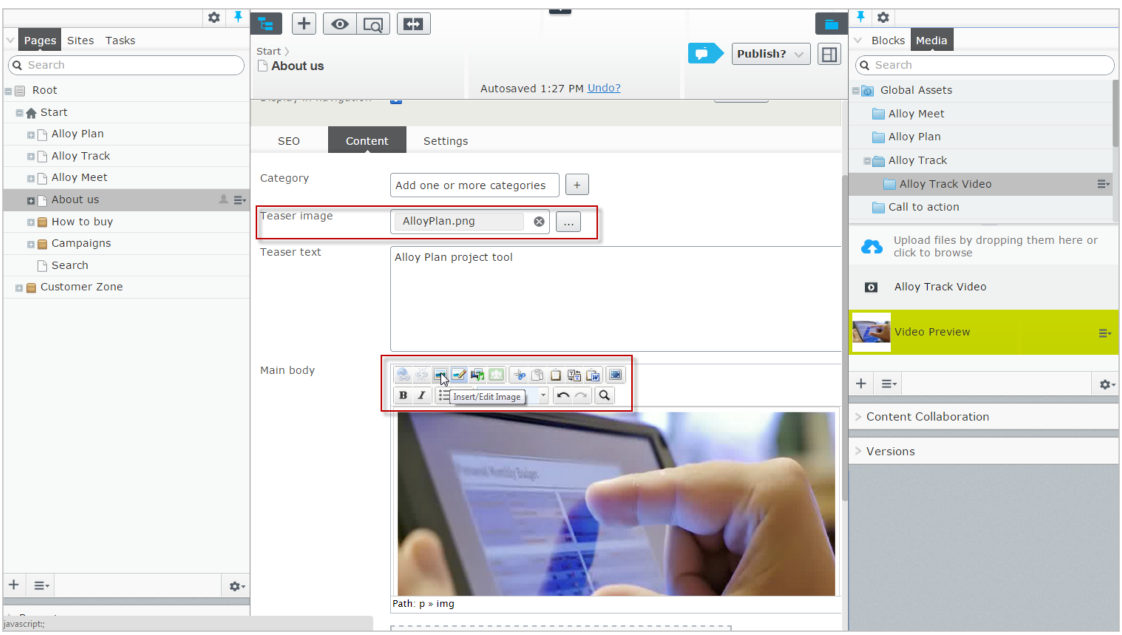
CMS

Adding and editing images

A web page does not embed images, instead it links to the media library where images are stored. To display images in content, the images must be available in a folder in the **Media** structure. You can edit images inside Episerver using the **Image Editor**, providing basic image editing features such as cropping, resizing and transforming.

Adding images to content

Images often are added to content through an **image link property**, where you simply select an image from a folder under the **Media** tab, and the image is automatically placed and displayed in the content.



You also can add images to the **rich-text editor** or **content areas** in pages or blocks, either through **drag-and-drop** directly from **Media**, or by using the **toolbar** in the rich-text editor:

1. Place the cursor in the editor area where you the image.
2. Click the **Insert/edit image** button on the editor toolbar.
3. Enter an **Image description** for the image. The image description is important when a reader has turned off the display of images in the browser or when a visually impaired user is using a screen reader.
4. Type a **Title** for the image. The title is shown when the reader moves a mouse over the image.

5. Select the desired image in the **Media** folder structure.
6. Click **Insert**.

Editing images

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

- In the rich-text editor, click the image and then select **Image Editor** in the toolbar.
- Locate the desired image in **Media**, and select **Open in Image Editor** from the context menu.

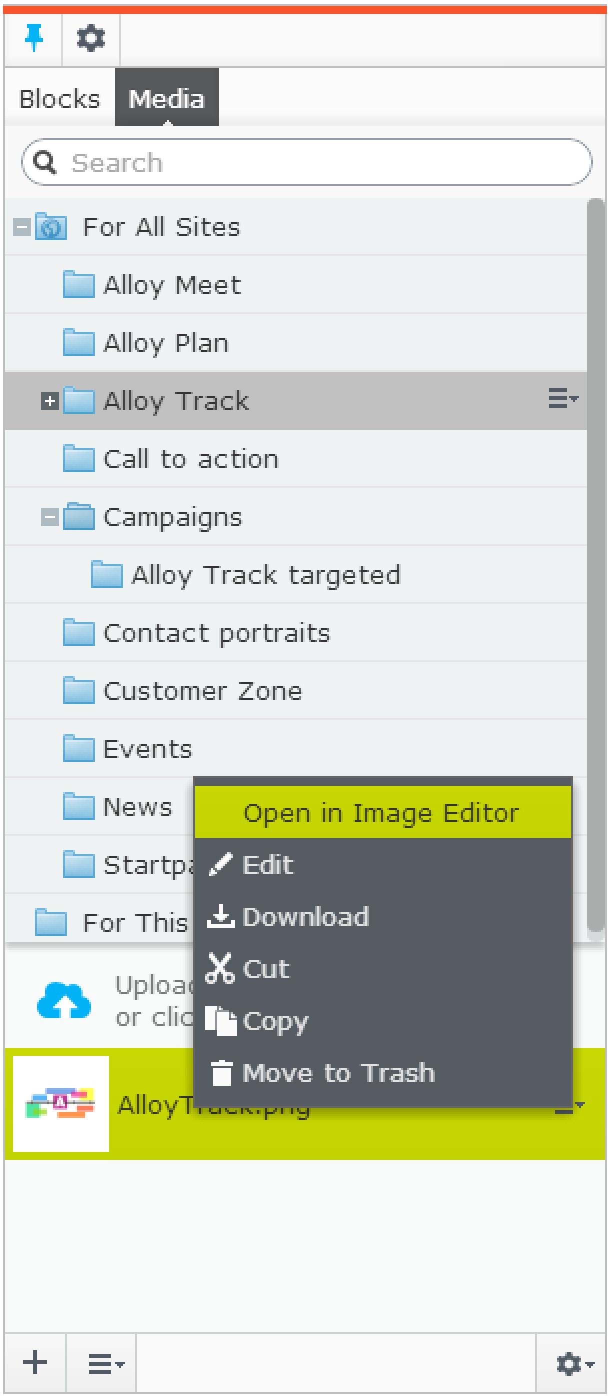


Image editing features include cropping, resizing and transforming:

Image editing	Description
Crop	Enter values for **Top**, **Left**, **Width** and **Height**, or draw a selection in the

Image editing	Description
	image to crop. **Note:** Remember to click **Apply** to save the changes before proceeding.
Resize	Enter values for **Width** and **Height**, or move a corner handle to resize, keep **Constrain proportions** selected to retain the image proportions. **Note:** Remember to click **Apply** to save the changes before proceeding.
Transform	Flip or rotate the image, or select **Grayscale** to convert to grayscale.
Preset values	Apply preset values for cropping and resizing, if such values are configured for the website.

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

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

> Selecting the **Edit** option in the context menu for an image allows you to edit the **metadata**, which for an image can be photographer, description and copyright information and such. See Media.

Removing images from content

For an image in:

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

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

Changing image properties

You can control the display of images in the **rich-text editor** through a set of properties:

1. Select the image you want to change in the editor area.
2. Click the **Insert/edit image** button on the editor toolbar.
3. On the **General** tab, you can change the **Title** and **Image description**. Click **Update** to save your changes.
4. On the **Appearance** tab, you have the following options of positioning images in relation to text. Click **Update** to save your changes.

Option	Description
Dimensions.	Change the display size of an image. Ensure that **Constrain proportions** is selected to keep the image proportions. Enter the width of the image in pixels, and the height is changed accordingly.
Class.	Select a CSS class if any are available for positioning images on your website. Or, select an option in **Alignment** to manually position the image.
Vertical space and **Horizontal space**.	Add a value in pixels for the space between the image and the surrounding text if it is not handled by the CSS class. For example, this might be useful if you have a large amount of text on a page and want to place an image in the top right corner with the text floating around it with some space padding between the image and the text. The preview window lets you see the result of the different options you choose.
Border.	Add a value in pixels for the image border if it is not handled by the CSS class.

5. On the **Advanced** tab, you can change any of the following. Click **Update** to save your changes.

Option	Description
Alternative image.	Add images for **mouse over** and/or **mouse out**. Browse to select the images in the media library. For best results, these images need to have the same size proportions in pixels.
ID.	Set a unique identifier for the image that you can reference by style sheets or by a JavaScript providing additional functionality.
Language direction.	Set the language direction (left to right or right to left) for the description, title and other text attributes specified for the image.
Language code.	Set the desired language if you have an image showing content in a different language than the actual page. Enter the standard language code format, such as **it** (Italian), **es** (Spanish), **en** (English) and so on.
Image map.	Associate an image map with the image. Image maps map certain areas of an image to links or other actions. There is currently no built-in way to create image maps in TinyMCE.
Long description link.	Type a link to provide a longer image description than what fits in the description field. Most visual browsers do not support this feature; this is primarily an accessibility feature.

CMS Adding links

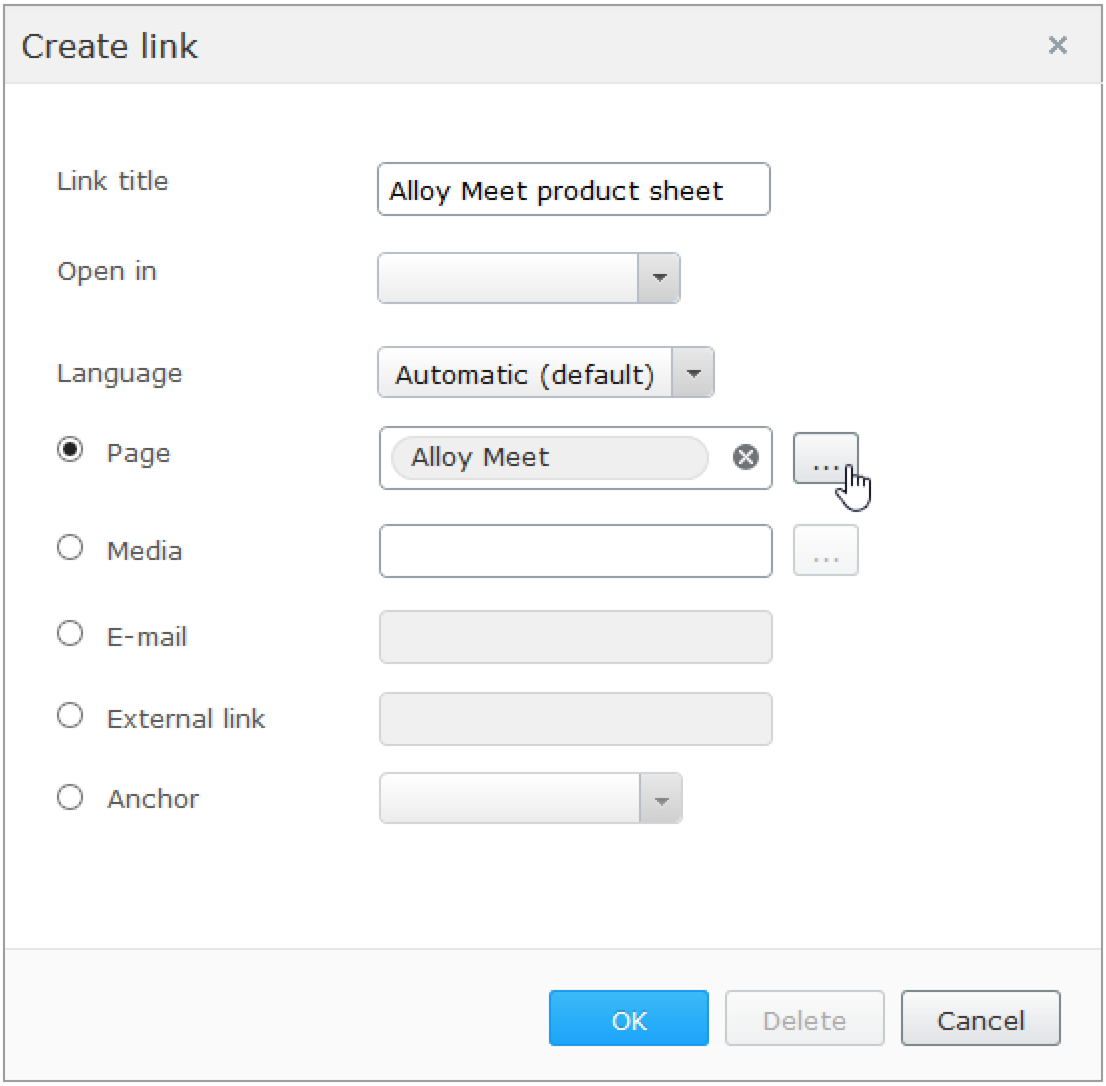
Links are used on websites to link to content. In Episerver CMS, the following link types are available by default.

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

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

Creating a link

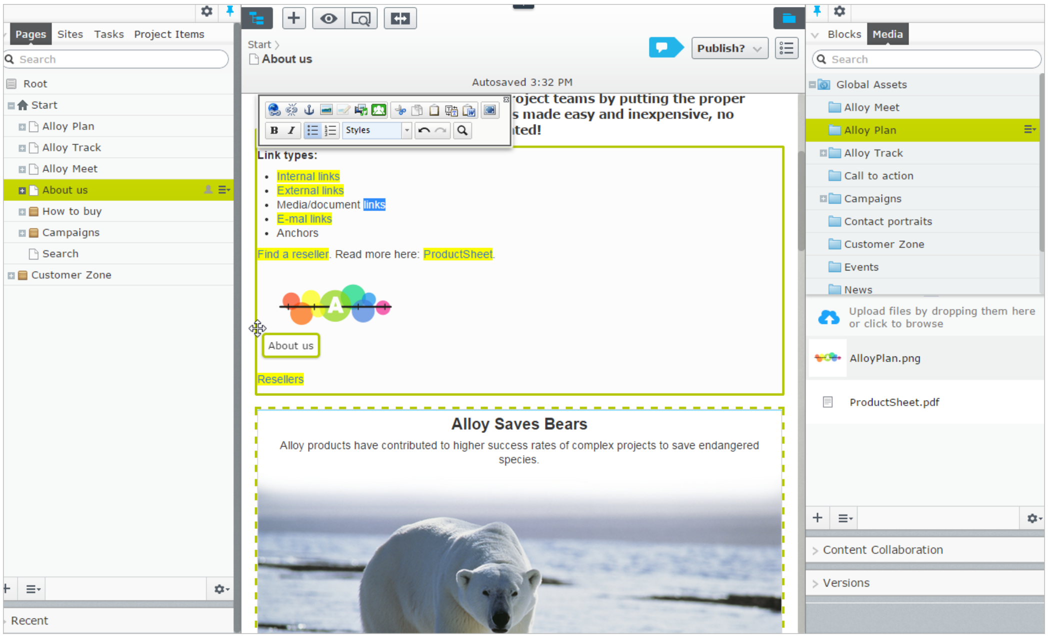
You can create a link in the rich-text editor through drag-and-drop (pages and media files), or by selecting text and clicking the **insert/edit link** button in the toolbar, which displays the link dialog box.



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

Options for linking to a page on the same website

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



Linking to a page on an external website

Select the text where you want the link in the rich-text editor, click **insert/edit link**, and use the **External link** option to enter the web address (URL) to the website to link to, such as http://externaldomain.com.

Options for linking to files in Media

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

> You can create links to any type of document format, but when upclick a link the behavior depends on the file format and the settings of the computer from which the link is opened.

Linking to files on a file server or an external website

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

Linking to an email address

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

Linking from an image

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

Anchor links

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

1. Select the text in the rich-text editor where you want to **place the anchor**.
2. Click **Insert/edit anchor** and enter a name for the anchor. Avoid using special characters or spaces.
3. Select the text in the rich-text editor where you want to **link to the anchor**.
4. Click **insert/edit link** and use the **Anchor** option to select the anchor to link to.

Link properties

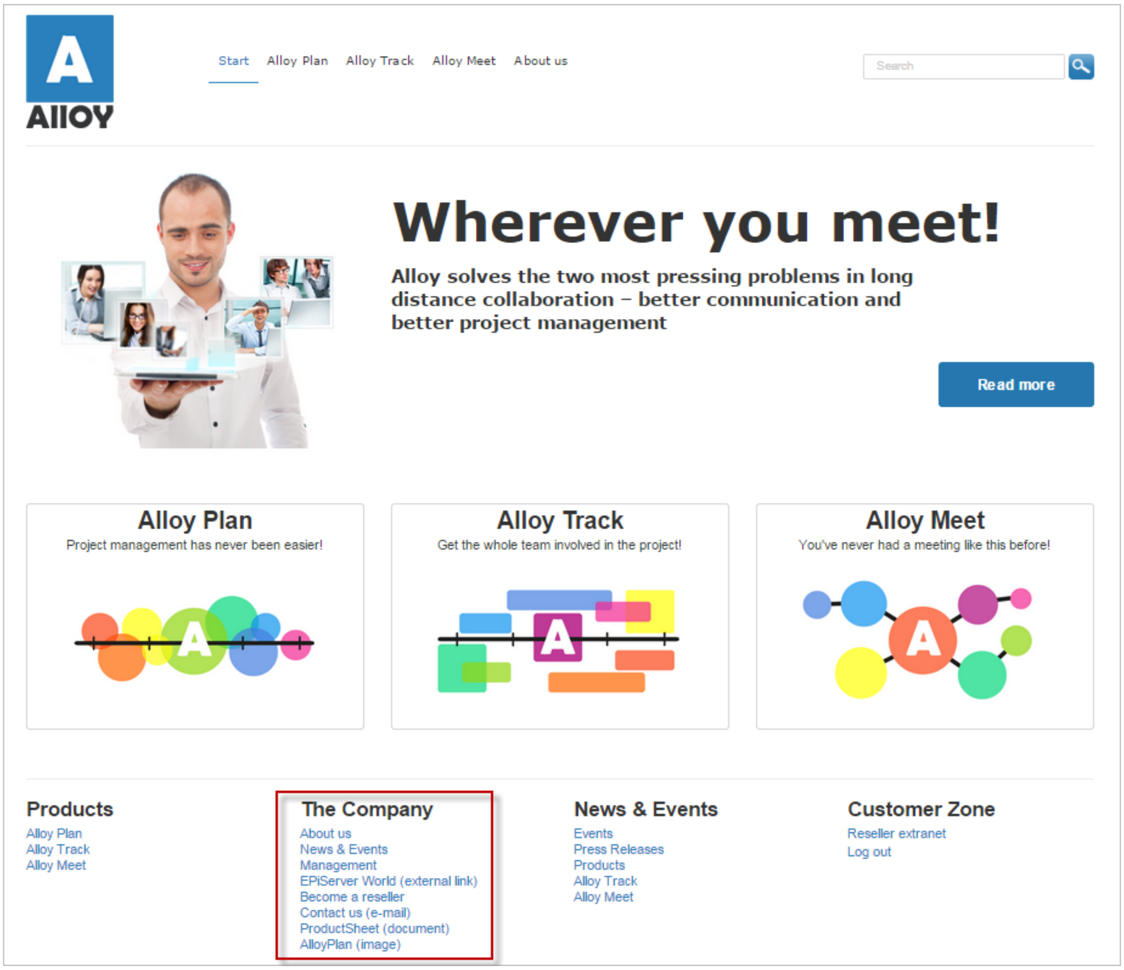
The following examples show common implementations of link functionality on websites, with functionality similar to what is described for the link dialog above.

Image link

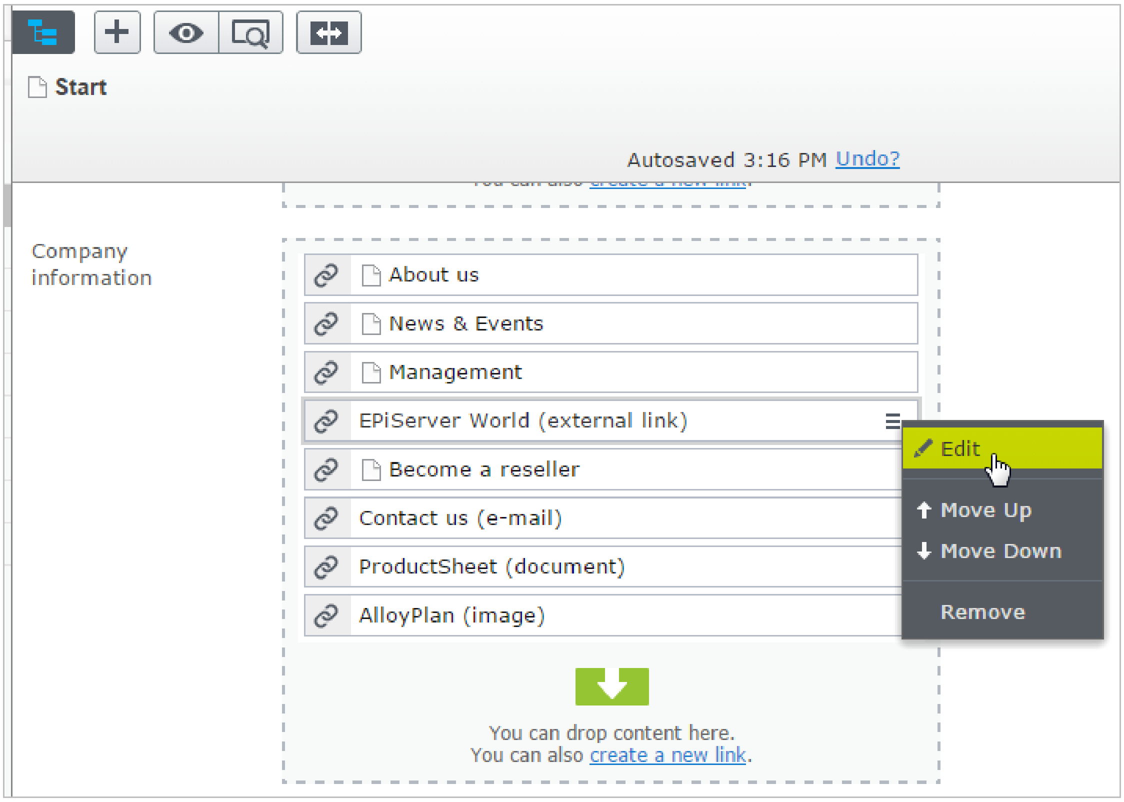
When you add images to content areas intended for images or blocks and so on, instead of adding the image in the rich-text editor, you can use an image link property which lets you select an image from a folder in Media, automatically placing it properly in the content area. See Adding and editing images.

Link collection

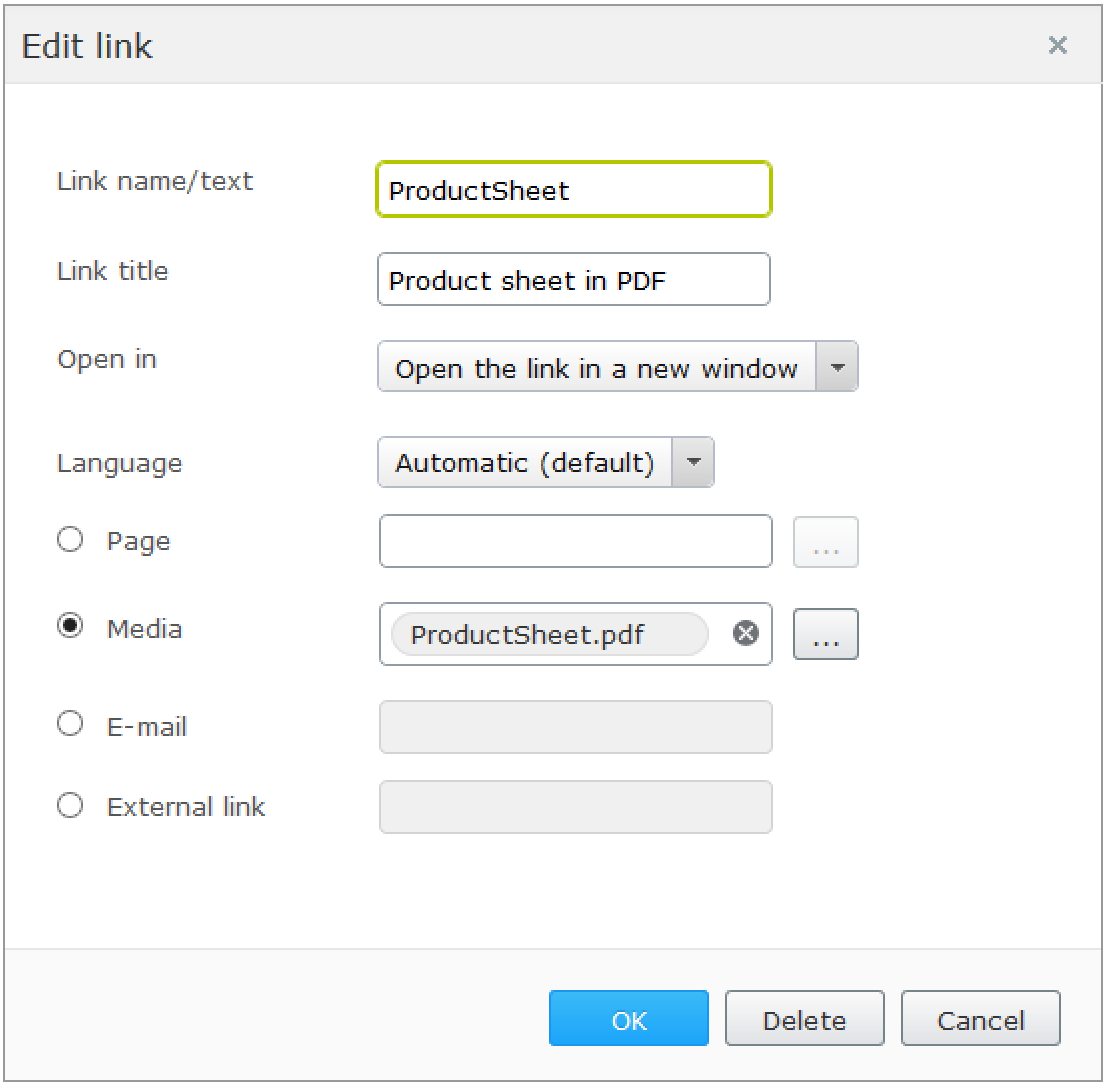
A link collection is a property where you can manage a group of links.



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



You also can edit the displayed name of the link.



Commerce

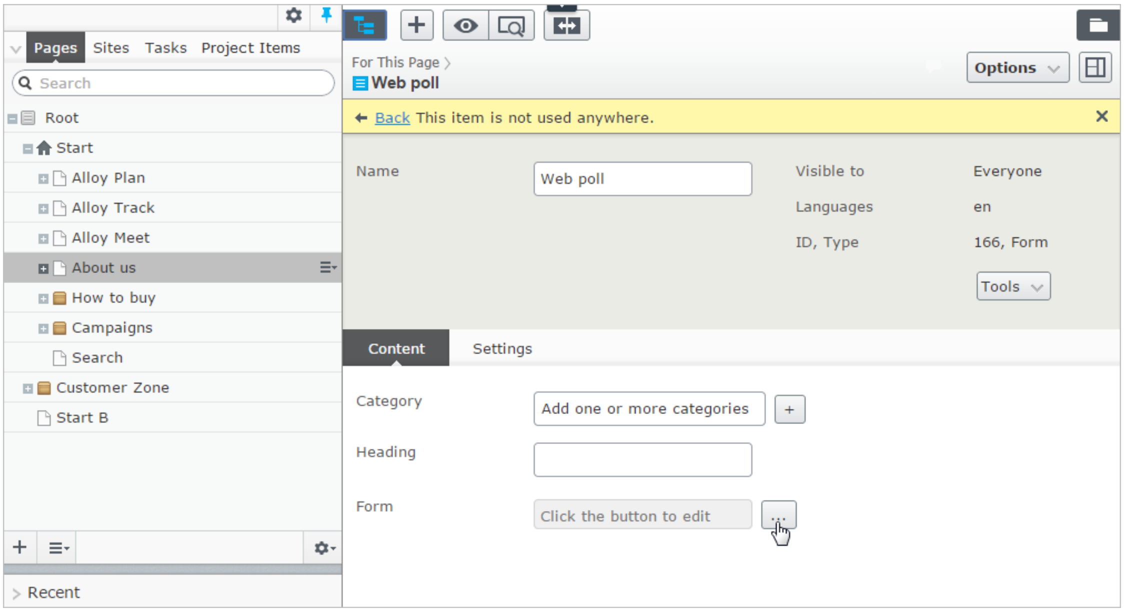
Linking to catalog entries

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

CMS

Using forms

Web-based forms is a popular and frequently used feature on websites for creating questionnaires or registration forms for events. The built-in forms functionality in Episerver CMS is available through a form property, which is added to a page template or a block during implementation. On the Episerver sample site, the forms functionality is made available through a Form block.



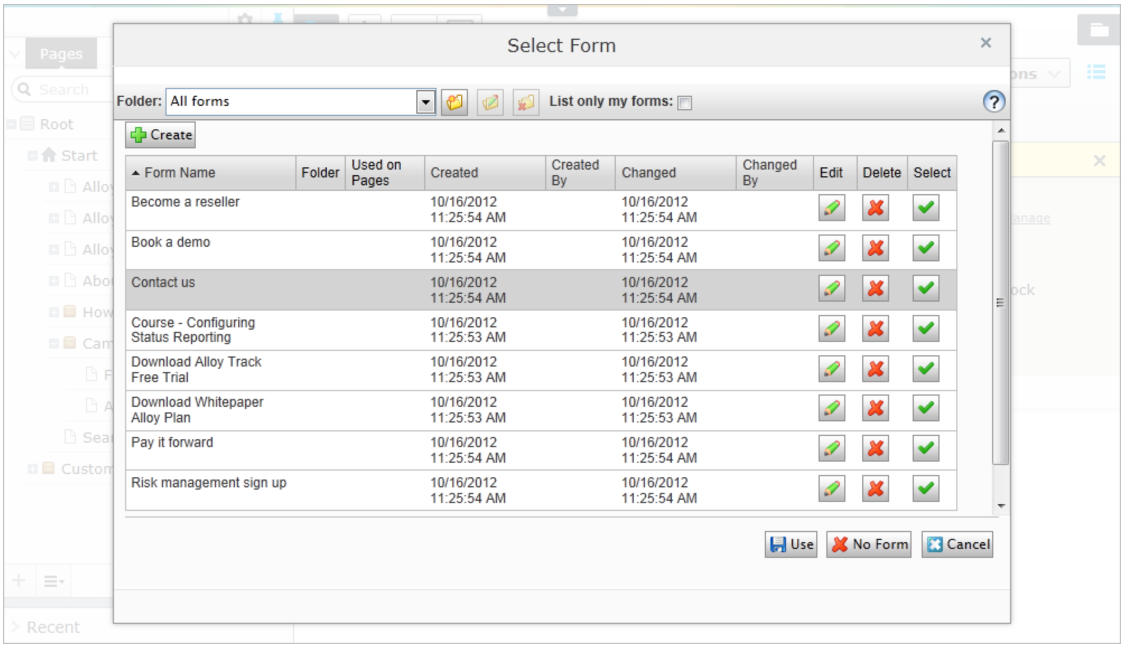
You also can create block-based forms; see Episerver Forms in the online user guide.

Locate the **Forms** property (its location depends on your system configuration), and click the button to access the **Select Form** dialog, the "entrance" to forms management.

Managing forms

Forms are administered in the **Select Form** dialog box, from where you can view all web-based forms on the website, organize them in folders and use them in content. You can place forms in a selected folder when you edit or create them. You can delete form folders but you can only delete empty folders.

- Click **Edit** to edit an existing form. You can save the existing form with a new name to keep the original.
- Click **Delete** delete a form. You also can delete forms from within the **Edit Form** dialog box.
- Click **Select** to select a form, and then **Use** to use the selected form in content.
- Click **No Form** to remove a link to a form that is currently used in content.



Creating a form

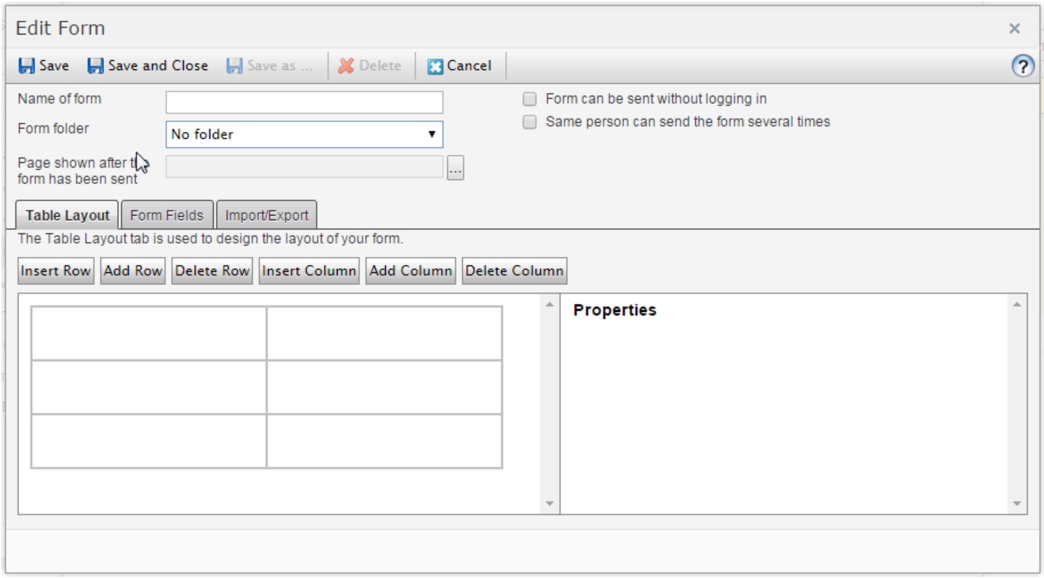
Start by creating the layout, then add the desired form fields. Complete the form by providing a name and defining the usage, then save it to become available for linking into content.

1. Creating the layout

Table Layout allows you to add rows and columns as desired to design the form. The table must contain at least one cell (row or column) before you can add any form fields.

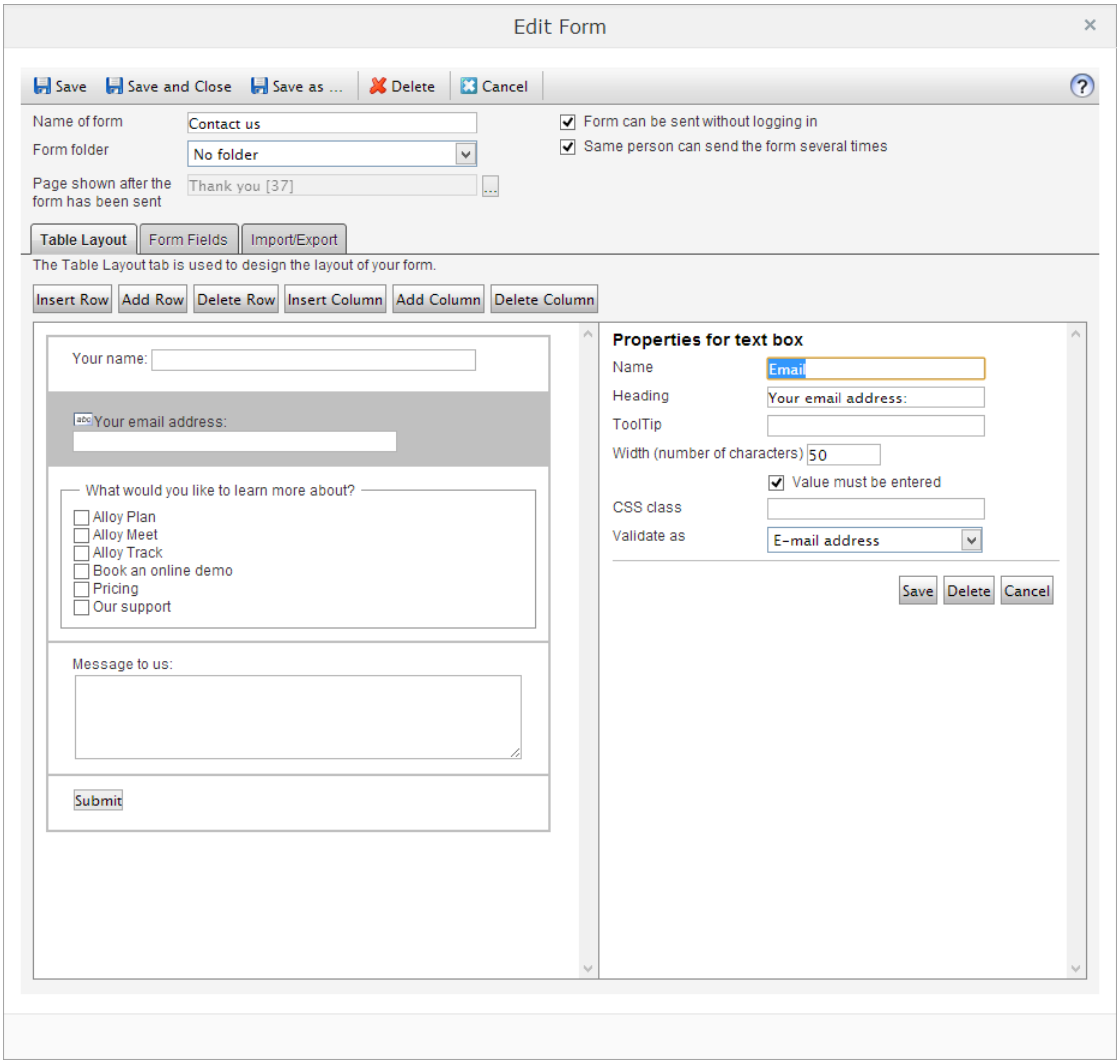
- Click **Insert Row** to insert a row above the row that is currently selected.
- Click **Add Row** to add a row at the bottom of the table.
- Click **Delete Row** to delete the selected row.
- Click **Insert Column** to insert a column to the left of the selected column.
- Click **Add Column** to add a column to the far right of the table.

- Click **Delete Column** to delete the selected column.



2. Adding form fields

After creating the basic layout, click **Form Fields** to add the fields. Click a cell in the layout, and select the desired type of field to add. You also can drag a desired property into the selected form table cell. You can add only one field in each table cell. Depending on the selected field type, properties are displayed for values to be entered. Save your changes when done with a set of field properties.



Common form field properties

Field property	Description
CSS class	Apply a CSS class (format) for the field (the class must exist in the CSS files for the website).
Name (mandatory)	Identifies the field in the database, and is not visible to visitors. You can use the same name as for the **Heading** field. Only characters A-Z, a-z, 1-9 and _ are allowed.
Heading	Indicates what should be entered in each form field.
ToolTip	The tooltip appears when you place the cursor over the form field.

Field property	Description
Value must be entered	Select this check box if you want a value to be mandatory. If a value is not entered in the field, an error message appears that refers primarily to the **Heading** in the field. If you do not have a heading, it refers to whatever you have entered in the **Name** field.
Validate as	Checks whether a form field value is entered using the correct format, for example an email address, a date format or various types of numbers.

Form field types

Field type	Description
Text box	Short text information placed on one row.
Text area	Larger amount of free text, you can define number of characters and rows.
Drop-down list	Adds a drop-down list field type to select options from. » In the Options group, specify available alternatives. » Enter a Name for the option and a Value to identify the field in the database. » Check Preselected to indicate an option that will be selected by default. » You can change the order in which the options are displayed in the list.
Radio button	Adds options where only one can be selected (compare to check box). » Use Placement to display radio buttons horizontally or vertically. » In the Options group, specify available alternatives. » Enter a Name for the option and a Value to identify the field in the database. » Check Preselected to indicate an option that will be selected by default. » You can change the order in which the options are displayed in the list.
Check box	Adds options where multiple selections are allowed. » Use Placement to display radio buttons horizontally or vertically. » In the Options group, specify available alternatives. » Enter a Name for the option and a Value to identify the field in the

Field type	Description
	database. » Check Preselected to indicate an option that will be selected by default. » You can change the order in which the options are displayed in the list.

Button	Adds a button which will send the form when clicked.
	» Enter a Button text be displayed on the button.
	» In Result from sending, select an option for managing the form data when sent:
	  » Save to database saves the information in the database to be retrieved from there.
	  » In Send email to this address, enter the email address where the message will be sent. You can add several recipients by entering the email addresses separated by commas.
	  » In E-mail address of sender, enter the sender's address that should be in the message sent.
	  » In E-mail subject, enter the heading to be shown in the message subject box.
	  » In Send to specified URL, enter the web address for the information to be sent for further handling.

Heading	Adds a heading describing what should be entered, for example to explain sections of large forms.
Horizontal rule	Inserts a horizontal rule into the form, for example to split large forms into sections.

3. Completing the form

When you complete the form, enter values for the following form properties:

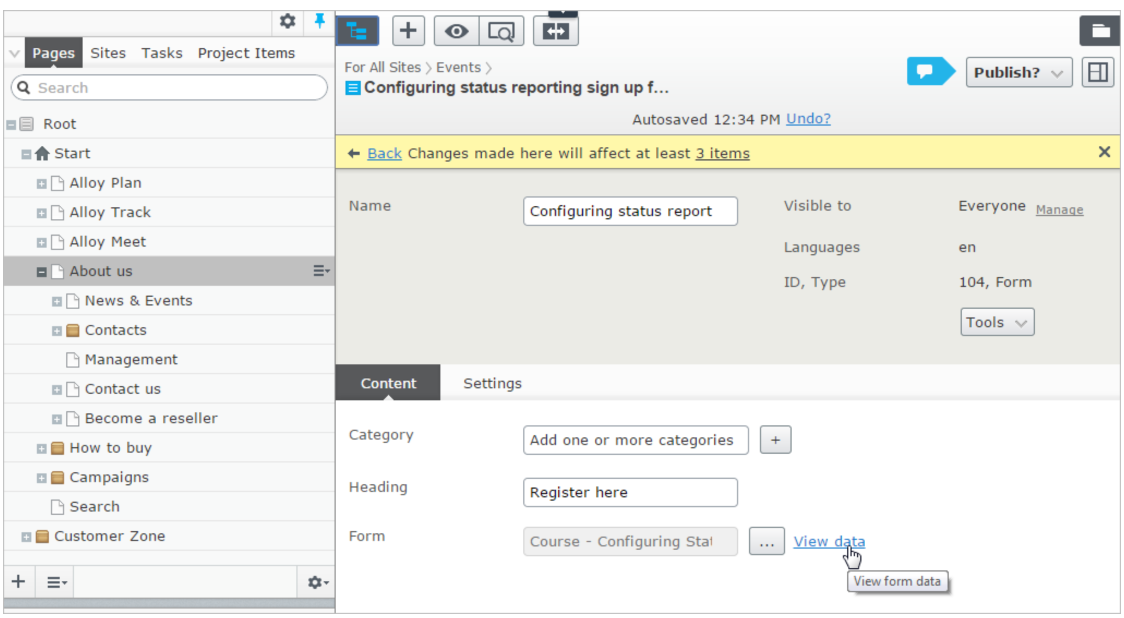
Form property	Description
Name of form	This name will be shown in the forms list, and in the subject row in any email messages sent.
Form folder	The location where the form is stored.

Form property	Description
Form can be sent without logging in	This option allows anonymous visitors to post the form. If deselected, visitors need to be logged in to the website to post the form.
Same person can send the form several times	This option allows the same person (that is, computer user) to post the form multiple times. If deselected, the form can be posted only once per computer.
Page shown after the form has been sent	Link to a confirmation page following a form posting.

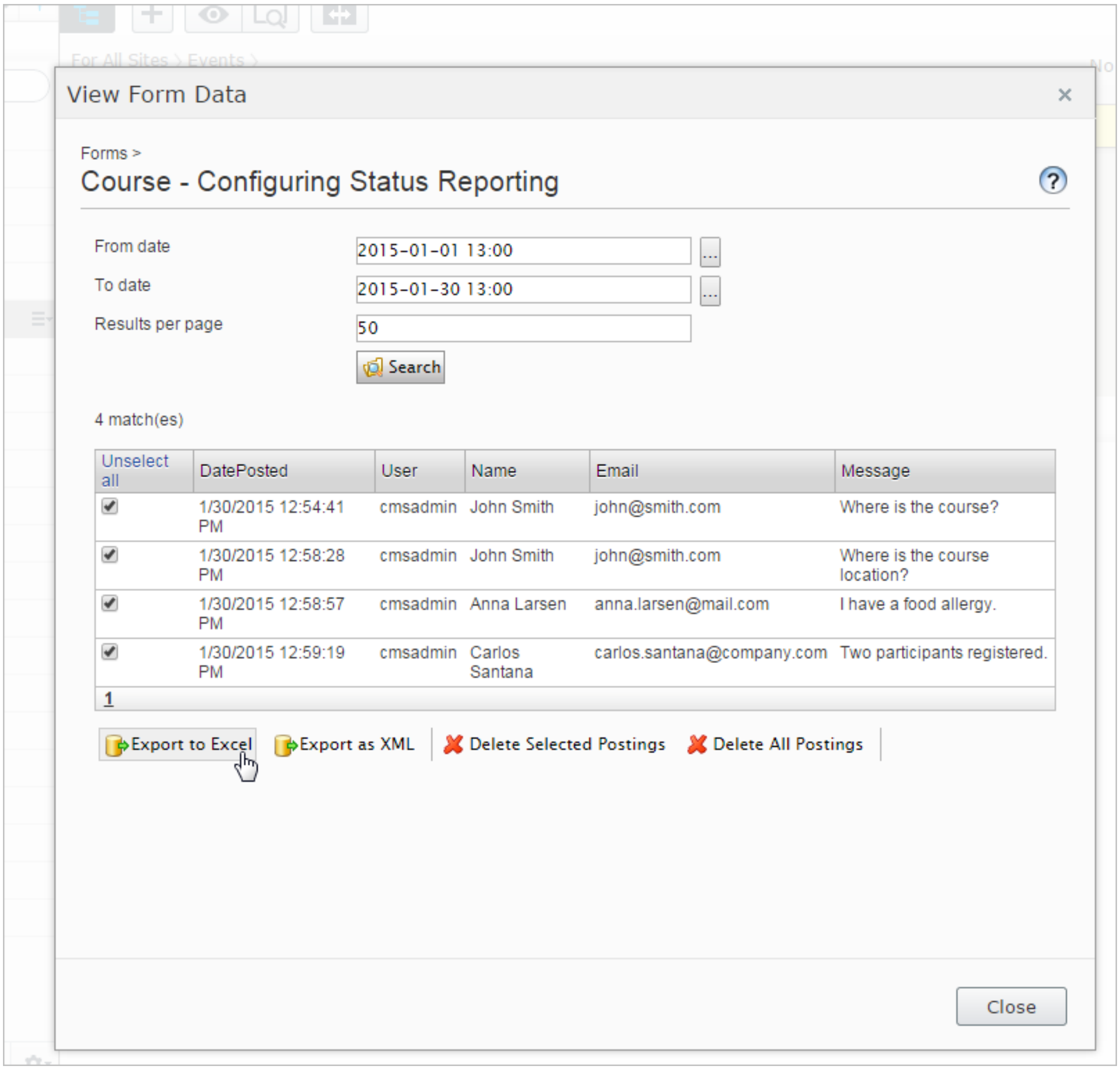
When completed, click **Save and Close** to return to the **Select Form** dialog. Click **Use** to link the form to desired content.

Viewing and exporting form data

If you chose to save the form data in the database as a posting result, the aggregated form data can be retrieved for viewing and exporting. Open the content (page or block) where you have linked to the form in the All Properties editing view, and locate the **Forms** property. Select the **View data** option to access the form data.



Forms data displayed is aggregated from all instances (page or block) where the form is used, if needed select a date interval to filter the data and click **Search**.



Before exporting, you can clean up the data by deleting any incorrect postings. Select the postings to export (click **Select all** to include all), and select the desired format to export to:

- **Export to Excel** exports the data to a Microsoft Excel file.
- **Export to XML** exports the data to an XML file.

Exporting forms

You can export forms between Episerver CMS websites. When you export a form, an XML file is created, which is then imported to the other website. Select a form to edit, go to the **Import/Export** tab, and click **Import** or **Export**.

CMS Inserting embedded media

Adding embedded media to content works in the same way in both Episerver CMS and Episerver Commerce. Embedded media can be, such as a video or Flash animations. Just as with images, the embedded media must be available on the **Media** tab to be able to link to the media file as described in Managing media. The most common file formats are supported on the Episerver CMS sample site. For information about other formats such as Quicktime, Windows Media, and Real Media, see available accessibility coding standards.

> Depending on the type of media you select on the **General** tab, the attribute options vary on the **Advanced** tab. For information about Flash movie attributes, see available accessibility coding standards.

Insert embedded media as follows:

1. Place the cursor in the editor area where you want to insert your image.
2. Click **Insert/edit embedded media image** on the editor toolbar.
3. In **Type**, select the type of media and associated format, such as Flash, Quicktime or Windows Media. Flash is the default.
4. In **File/URL**, browse to select the media file in the File Manager.
5. In **Dimensions**, set the dimensions of the movie in pixels. Ensure that **Constrain properties** is selected to keep the proportions of the movie.
6. Click **Insert** and the media is linked into the page.

Advanced settings

By selecting the **Advanced** tab, you can work with advanced media settings (background color, alignment and options for the display of media) as follows:

Advanced options

Setting	Description
ID	Set a unique identifier for the media. The ID can be referenced by CSS style sheets or by a JavaScript providing additional functionality.
Align	Position the display of the media on the page.
Background	Select a background color for the media by using the following options: **Picker**, **Palette** or **Named**. Click **Apply** to apply the background.
V-Space and H-	Enter the horizontal and vertical space in pixels to surrounding objects.

Setting	Description
Space	

Flash options

Setting	Description
Quality	Set the quality for the Flash movie to display. Specifies how to prioritize playback speed and appearance.
Scale	Set the scale to specify how the movie should adapt when displayed in a specified area.
WMode	Set the Window Mode property of the Flash movie for transparency, layering, and positioning in the browser.
SAlign	Specify how the movie should align in the browser window.
Auto Play	Select to make the movie play automatically when the page is opened.
Loop	Select to make the movie repeat indefinitely. If unselected, the movie will stop when it reaches the last frame.
Show Menu	Select to display the menu.
SWLiveConnect	Select to make the browser start Java when loading the Flash Player for the first time.
Base	Specify a base directory or URL used to resolve all relative path statements in the Flash Player movie. This attribute is helpful when your movies are kept in a different directory from your other files.
Flash Vars	Set the root level variables to be sent to the movie.

CMS Adding dynamic content

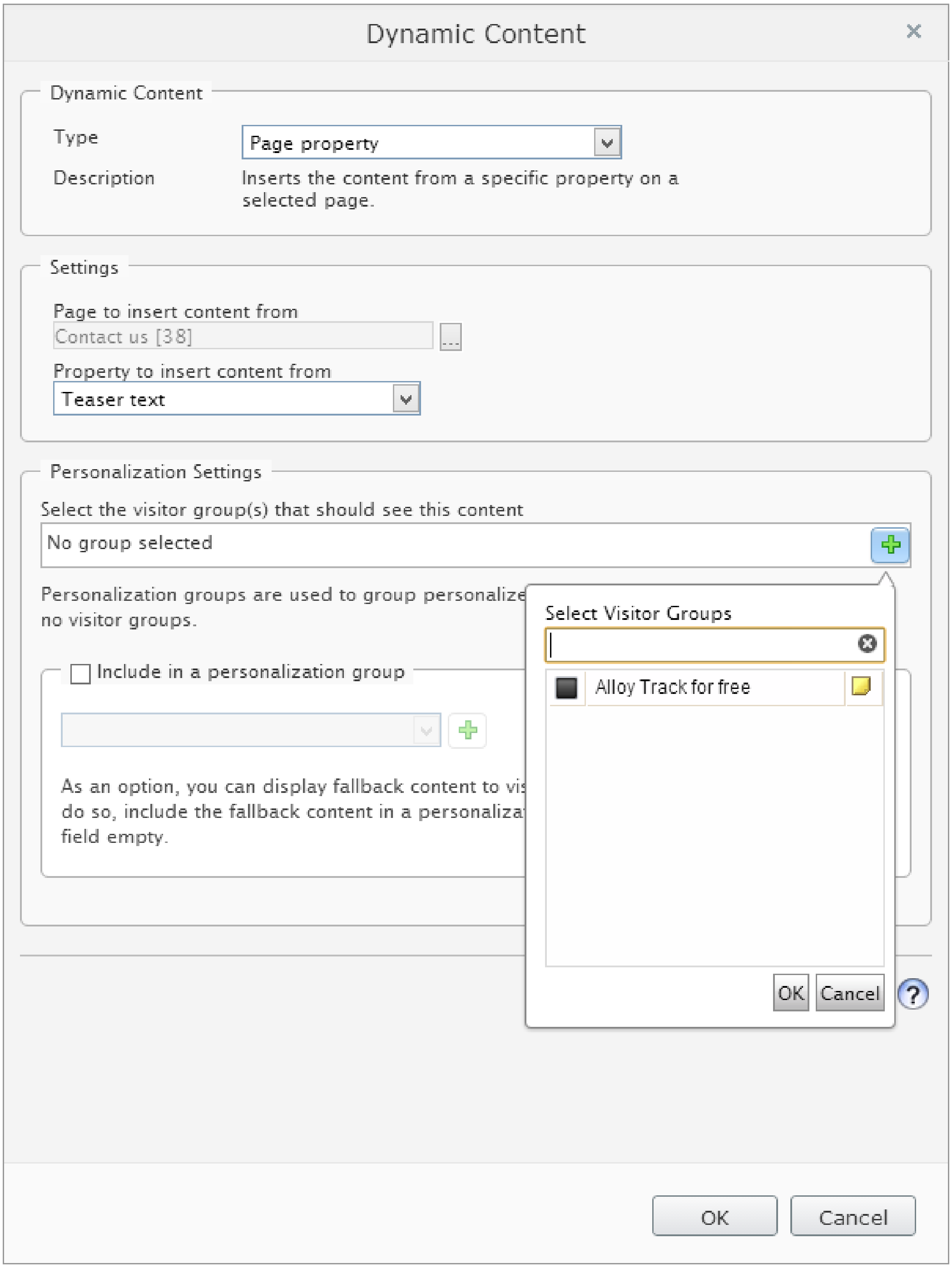
Add dynamic content to a page by retrieving it from different **properties** for a page. The source of the dynamic content can be, for instance, text in the “main body” field (the editor area on a page), or the date when a page was saved.

For example, you can use dynamic content to display company facts and figures that are reused on multiple pages of a website. You also can combine dynamic content with a visitor group; see Personalizing content.

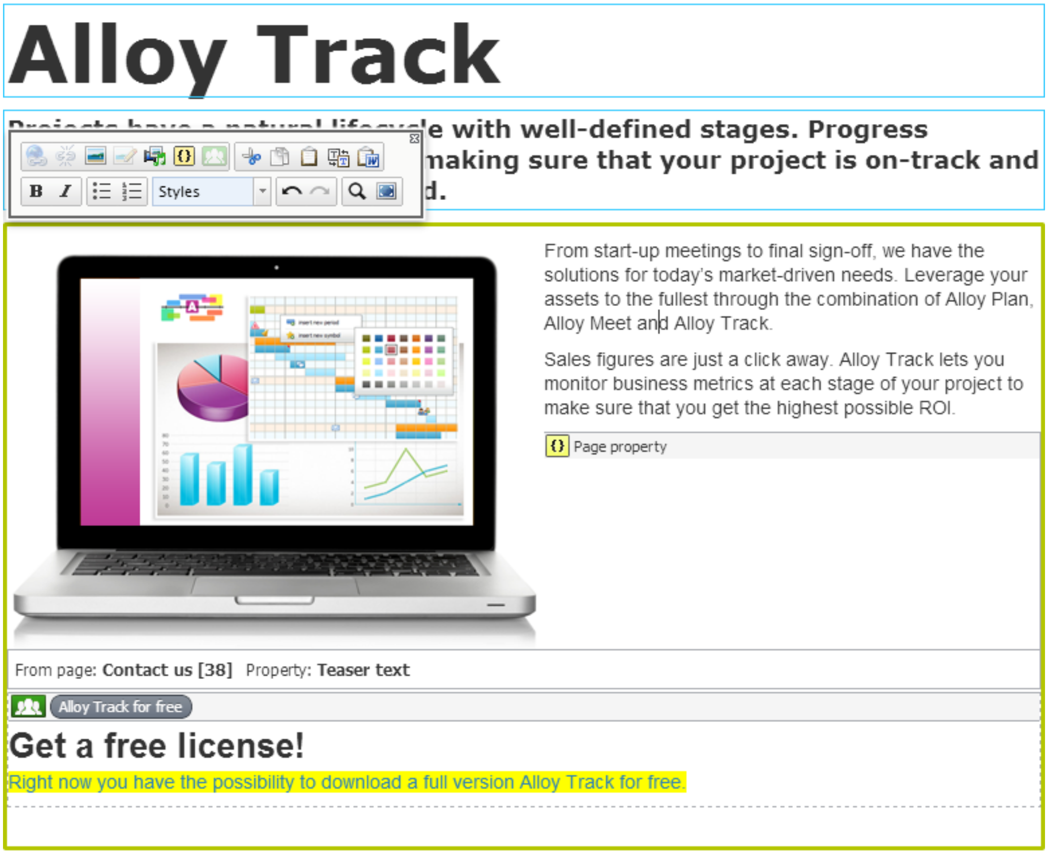
Dynamic content is not enabled by default. An administrator must enable it in the administration view. If it is not enabled, you will not see the **Dynamic content** button {} on the editor toolbar.

Add dynamic content from a **Page Property** as follows:

1. Open the page or block where you want to add the dynamic content and click the **Dynamic content** button {} on the editor toolbar.
2. In the **Dynamic content** window, select the plug-in that you want to use as a base for your dynamic content. An Episerver CMS standard installation includes the **Page property** plug-in, which is used in this example.
3. In **Page to insert content from**, select the page in the tree structure from which you want to display the data.
4. In **Property to insert content from**, select the property on the page from which you want to display data. In this example, you fetch data from the **Main body** property of a page.
5. Optional: In **Personalization settings**, you can click **+** to select the visitor group you want to have access to the dynamic content.



6. Click **OK**. The dynamic content appears as a box in the editor area. When this property is updated, all dynamic instances of the property in the content are automatically updated.



7. Preview the content and publish, or schedule for later publishing.

Editing dynamic content

You can cut, copy and paste dynamic content boxes in the editor area, just as you can with any other object. Select the “box” with dynamic content in the editor area, and click the **Dynamic content** toolbar button to edit. To delete, select the dynamic content box you want to delete and click **Delete**.

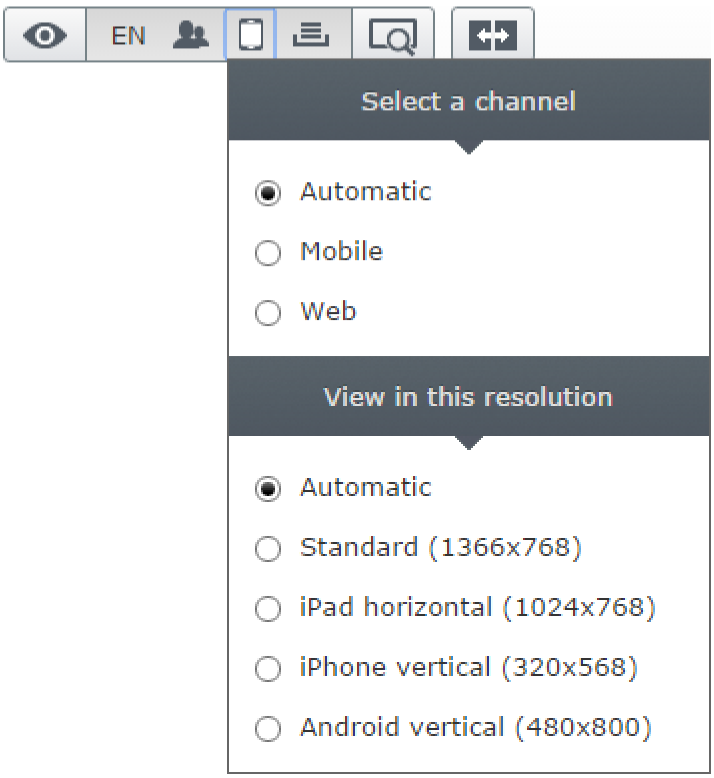
Cut and copy for a dynamic content box in the editor area may work differently depending on the browser you use. You may have to use either the cut and copy editor toolbar buttons, or the right-click and cut and copy of your browser, instead of the keyboard keys. If you have trouble placing the cursor immediately before or after a dynamic content box in the editor area, try using the keyboard arrow keys instead of the mouse.

CMS Previewing

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

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

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

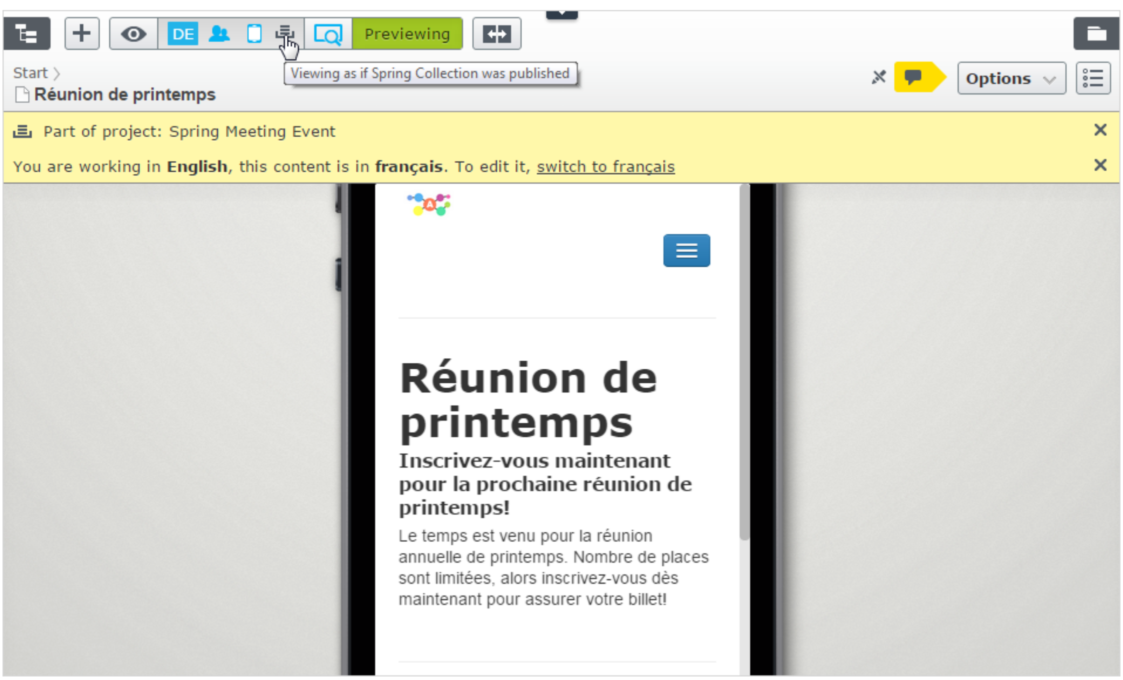


Use **View settings** (the eye symbol) to preview content with the following options:

View setting options	Button	Description
Languages	EN	Select a language to view the content as visitors using this language will see it.

View setting options	Button	Description
Visitor groups		View the content as the selected visitor group will see it.
Media channels		Select a channel and/or a resolution to see the content as it will appear with the selected settings. Note that the options here are customized for your website.
Projects		Navigate and view the contents of a project to verify the display before publishing. **Note:** This option is not available if the projects feature is enabled. In that case, the preview button displays the active project. To preview another project, you need to change the active project.

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



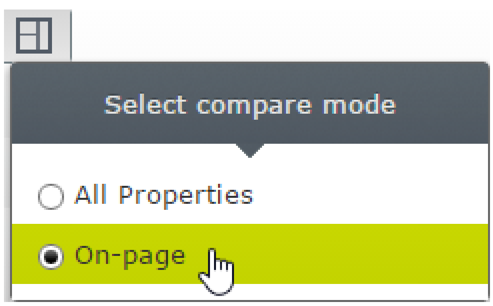
CMS Comparing versions

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

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

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

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

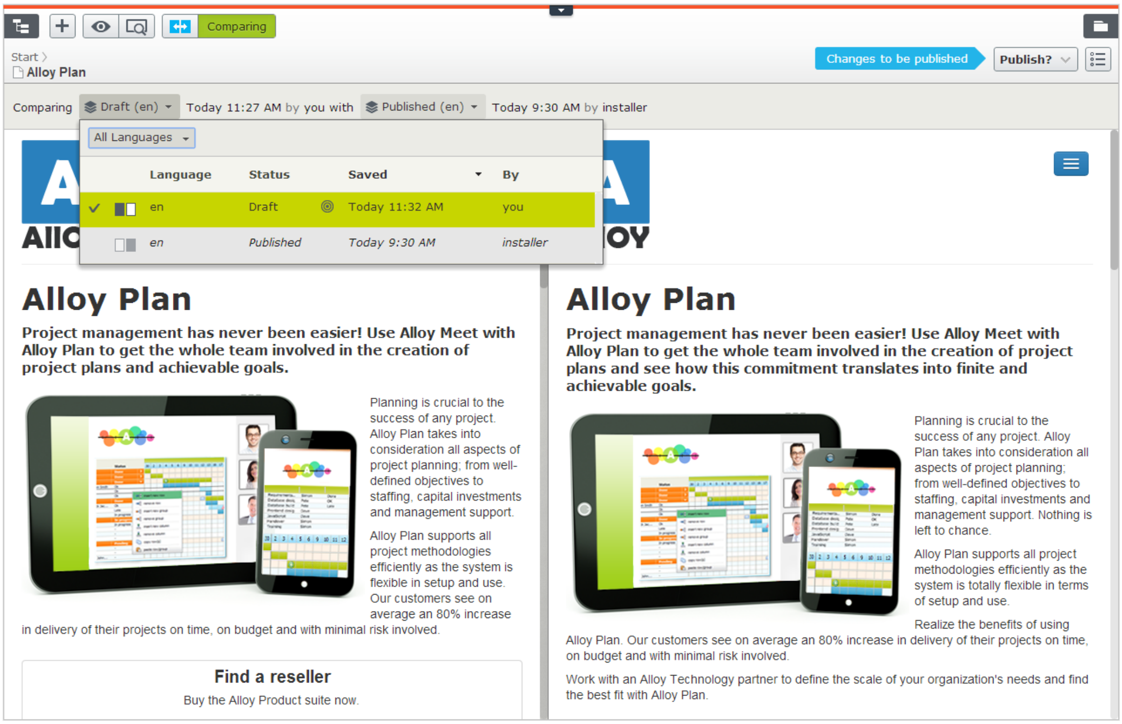


The notification bar displays two drop-down lists from which you can choose which versions to compare. By default, the draft is shown in the left pane and the currently published version in the right. All language versions of the content are listed by default.

Comparing content

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

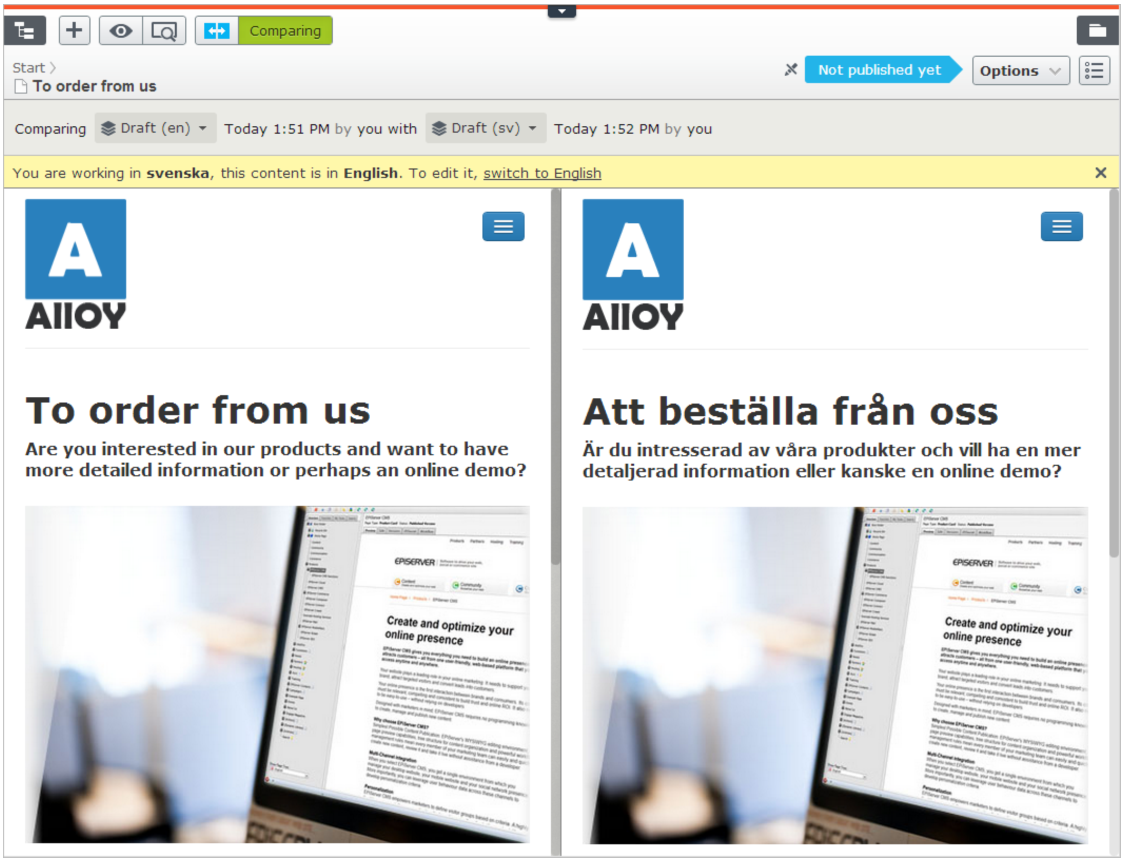
When you edit a published version in the left pane, a new draft is created and displayed in the version list. It works in a similar way as you edit content directly on the page, and when you are done, you can publish a draft, or republish a previous version.



Comparing language versions when translating content

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

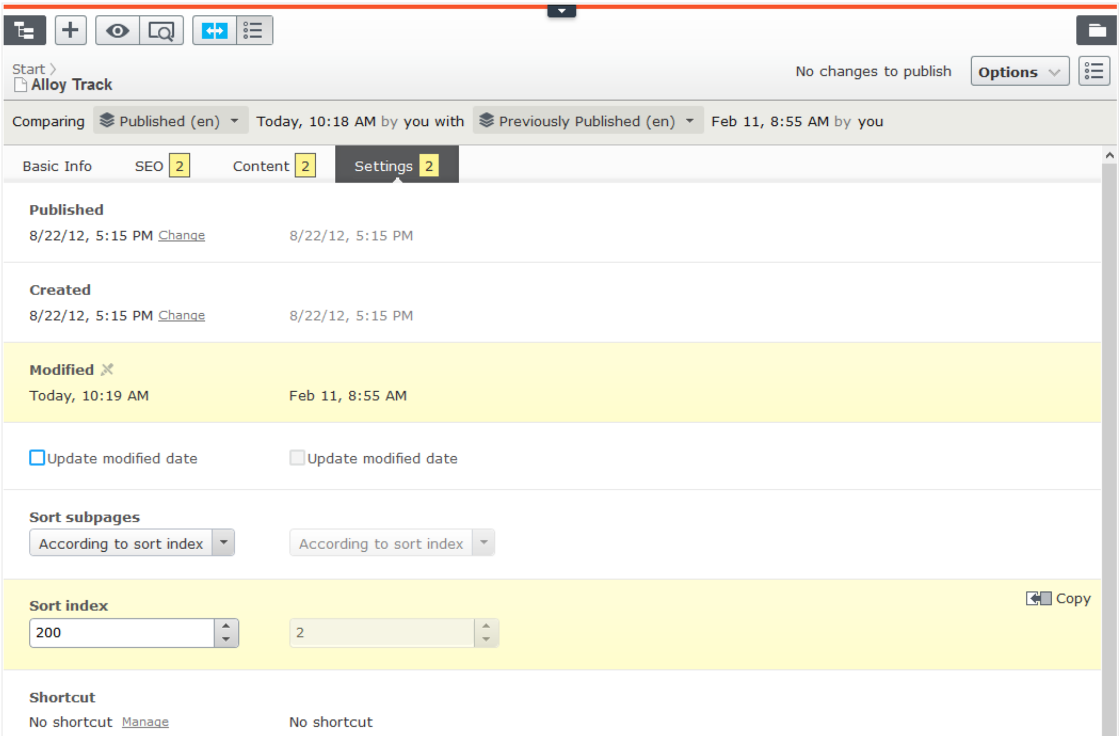
By comparing versions made in different languages, you can translate the content in the left pane side-by-side with the published version of the current language. You also can jump between languages to edit by selecting the current language in the version list of the left pane, and then switch language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



Comparing properties

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

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



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

CMS Publishing and managing versions

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

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

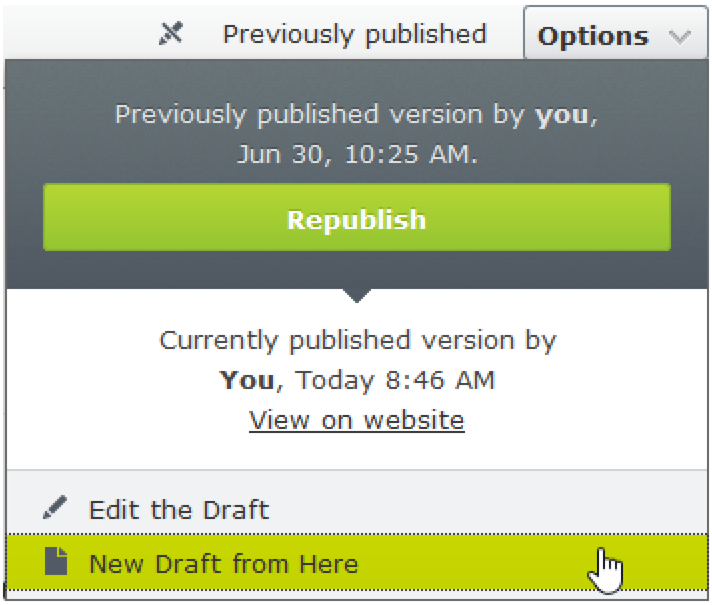
Publishing actions

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

Creating drafts and autosaving

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

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



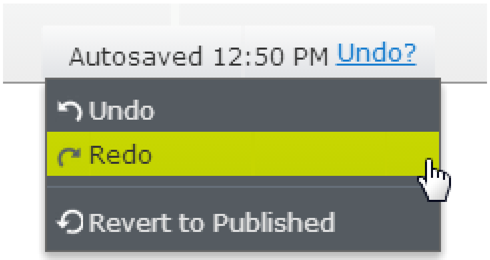
Undoing and reverting to published

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

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

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

- Select **Redo** if you discarded your changes through **Undo** and want to take them back again.
- Select **Revert to Published** to take back the latest published version, if the content was previously published.



Previewing and comparing

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

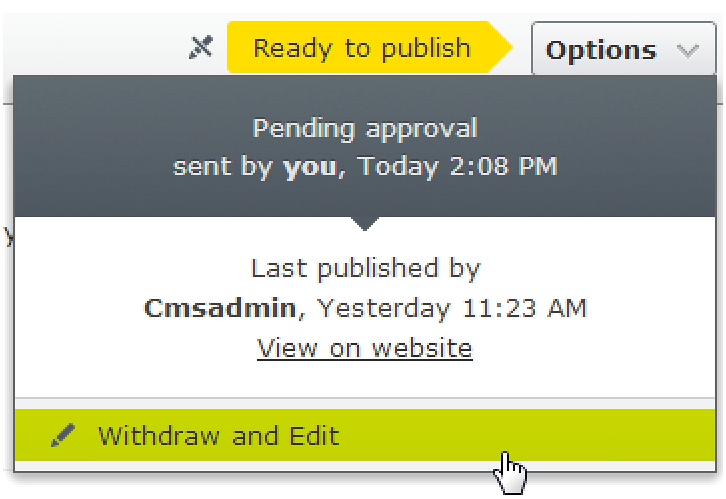
You also can compare different content versions by using the **Compare version** option in the top toolbar; see Comparing versions.

Publishing

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

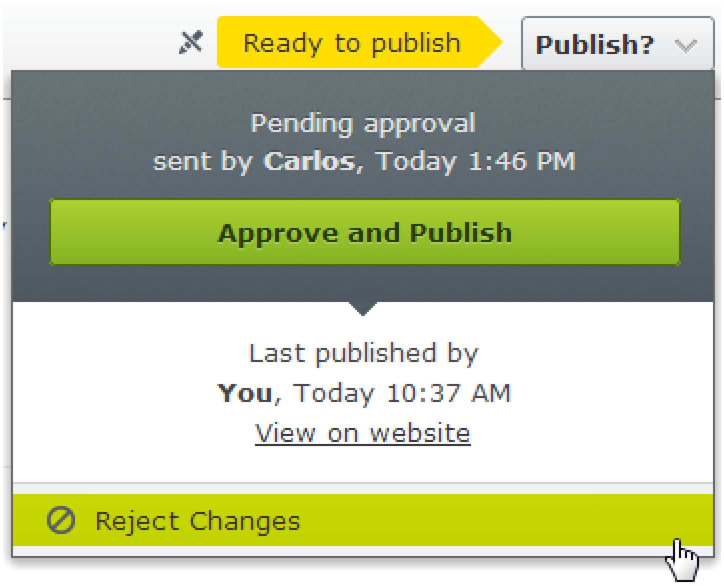
Setting Ready to Publish

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



Approving and publishing

If you have publishing access rights, you can **approve and publish** changes for content with the status *Ready to publish*. You also can decide to reject the changes, in which case the content version status is set to *Rejected*. This does not mean that the latest changes disappear, only that you need to edit the content again before it can be ready for publishing. You can monitor content status and related tasks under Tasks in edit view.

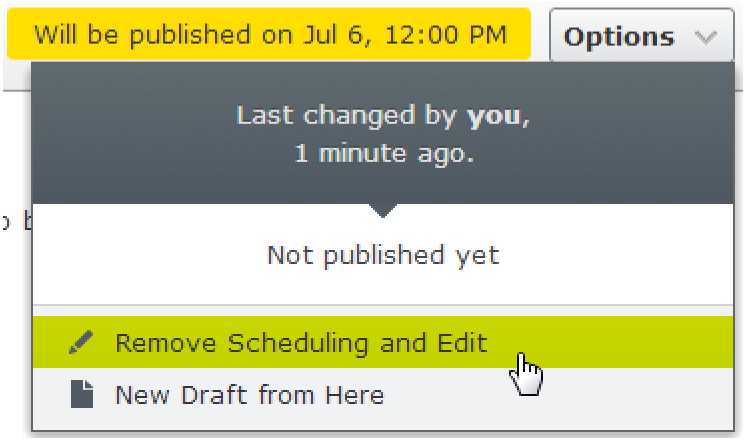


Scheduling for later publishing

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

Removing scheduling and creating new drafts

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



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

Publishing multiple content items

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

Managing versions

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

> You need to add the versions gadget to the left or right panel to see the version list.

Viewing versions

Content can have the following status in the version list:

- **Draft**. Content that is a work-in-progress and is not yet subject to any publishing actions.
- **Published**. The most recently published version and the one publicly displayed. Only one published version can exist.
- **Previously Published**. One or more versions that were published before the latest published version.
- **Ready to Publish**. Content awaiting approval and publishing.

- **Rejected**. A draft that was rejected by someone as part of an approval flow. You can edit and update the rejected content and then set to **Ready to Publish** again.
- **Delayed Publish**. Content scheduled to be published at a specified time.
- **Expired**. Content where a stop publish date and time is set and passed.

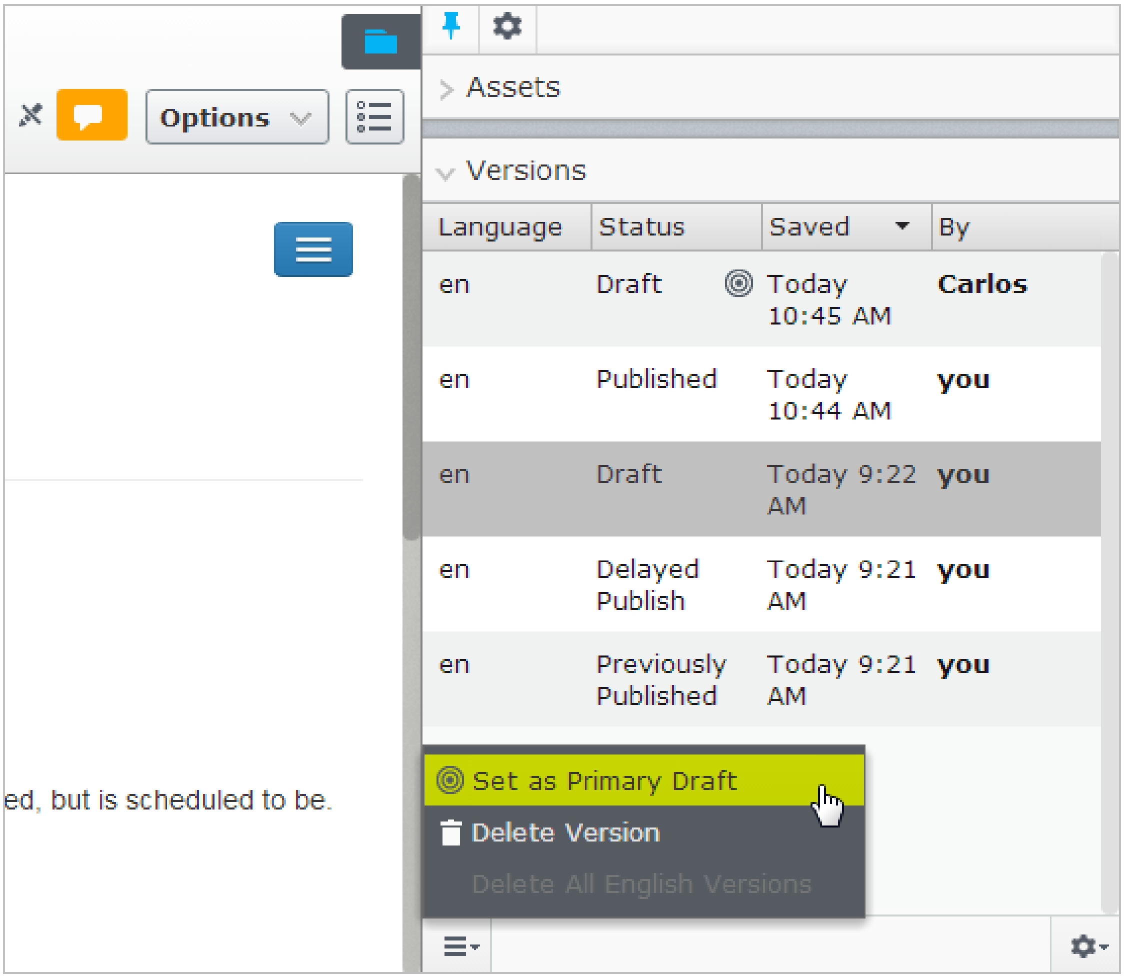
> You can define the number of stored content versions in the administration view. The default setting is 20.

Setting the primary draft

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

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

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



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

Editing and deleting versions

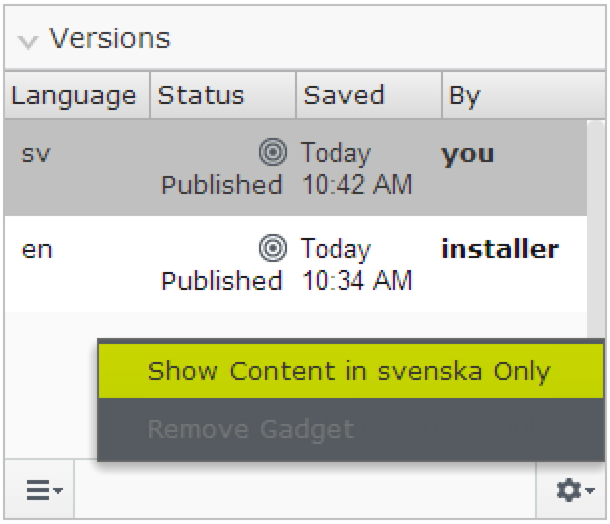
The content version selected in the version list is loaded into the editing area, from where you can edit the content or perform other available publishing actions.

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

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

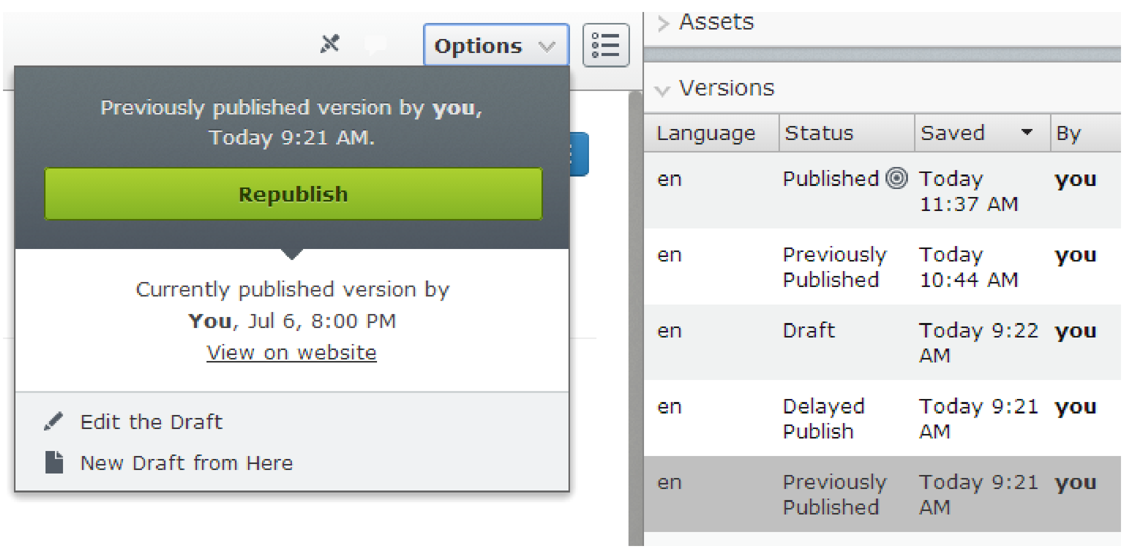
Managing language versions

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



Republishing a version

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

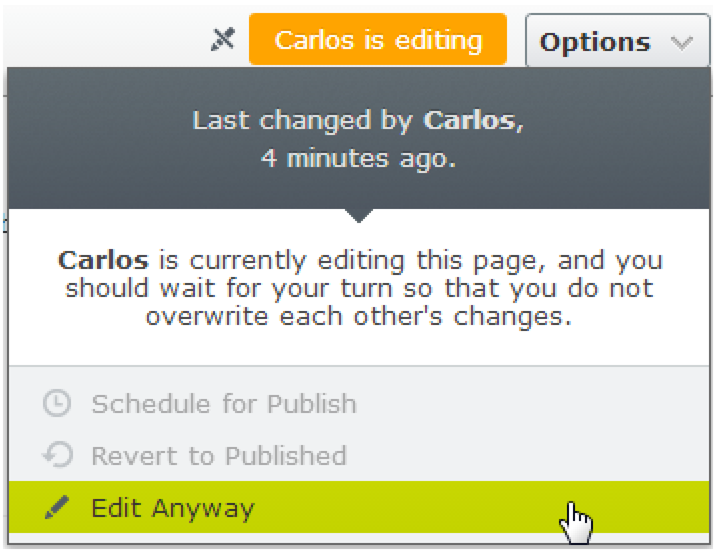


Working with shared content

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

Mark as being edited

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



Permanently mark as being edited

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

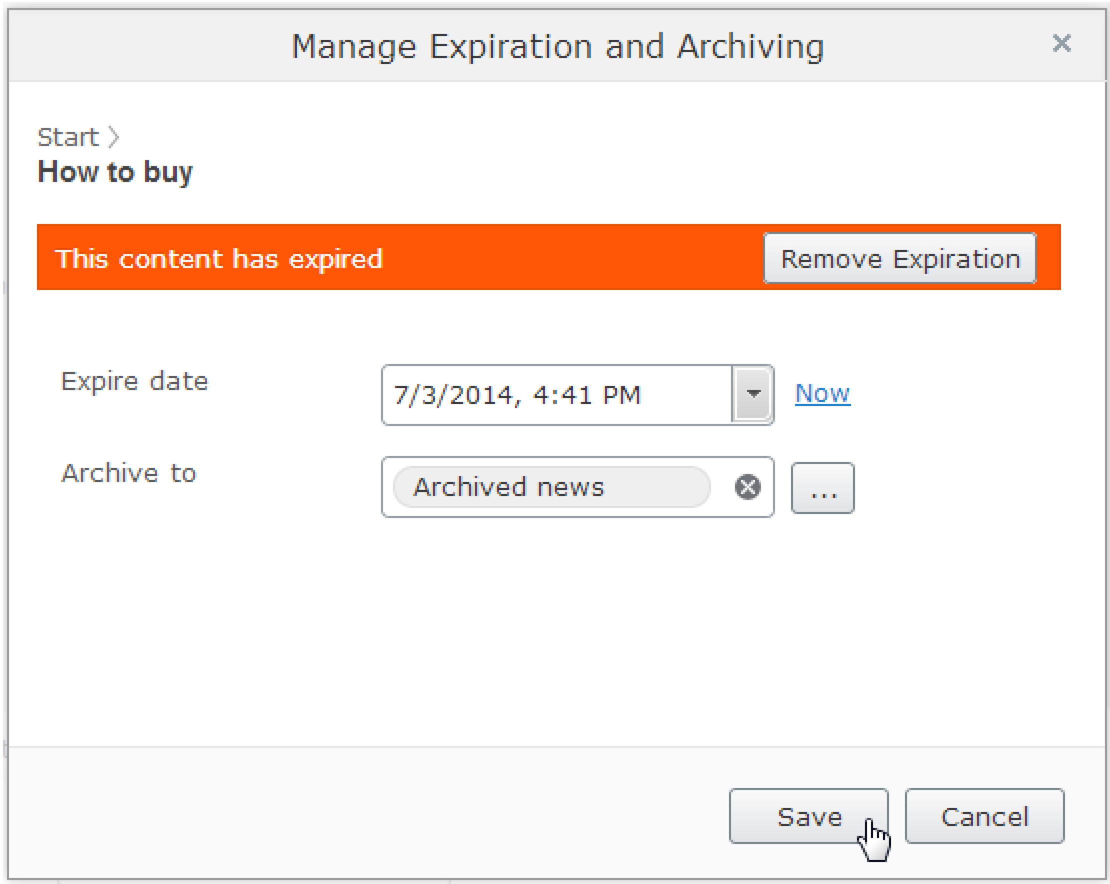
Setting expiration of content

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

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

Archiving of expired content

Episerver has a built-in archiving feature where pages with a *set stop publish time* are automatically moved to a defined archive branch when the time has passed. For example, this is useful if you have news pages in a listing where you want to remove old news from the listing, but still keep the pages. Archiving expired content occurs in the **Manage Expiration and Archiving** dialog box by selecting the page branch to which you want to move the expired page.



CMS

Managing content

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

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

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

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

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

Commerce **Commerce-related content**

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

Addons **Optimizing content to improve search**

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

CMS Projects

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

You can watch the following demonstration video, Managing content with the Projects feature, with commenting and notification.(5:20 minutes)

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

- Add the projects gadget to your user interface.
- Have an administrator enable the projects feature for the entire site.

The following table shows a comparison of the two methods:

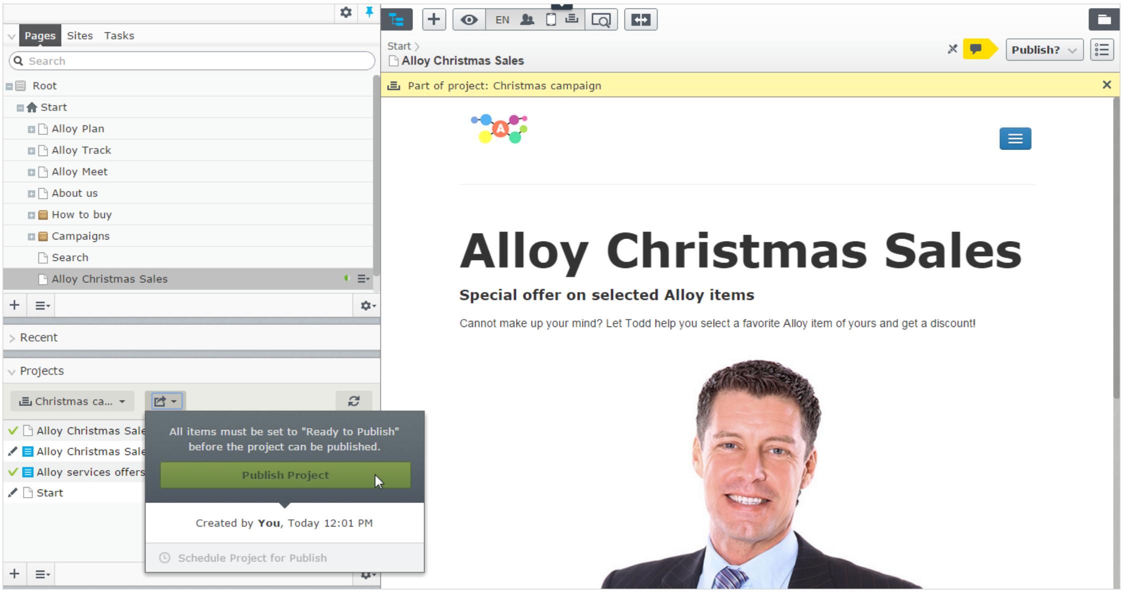
Projects gadget	Projects feature
Accessible to users who add the gadget.	Accessible only if an admin enables the feature from

Projects gadget	Projects feature
	admin view.
Added to your own user interface; does not affect other users.	Enabled or disabled for the entire site and affects all users.
You need to add content manually to a project.	Content is automatically added if a project is active.
Other editors (not using the Projects gadget) can update content associated with a project.	Content associated with a project can only be updated within the context of the project. (If content is associated to a project, an editor who wants to edit that content needs to have that project active or create a new draft).
When the project is published, the project is obsolete and can no longer be used.	You can continue working with a project even after some or all items are published.
All project items must be set to **Ready to publish** before the project is published.	You can publish multiple items that are set to **Ready to publish** and leave items that are not ready for a later time.
There are no collaboration features.	You can collaborate on projects by adding comments to projects and items.

CMS

The projects gadget

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



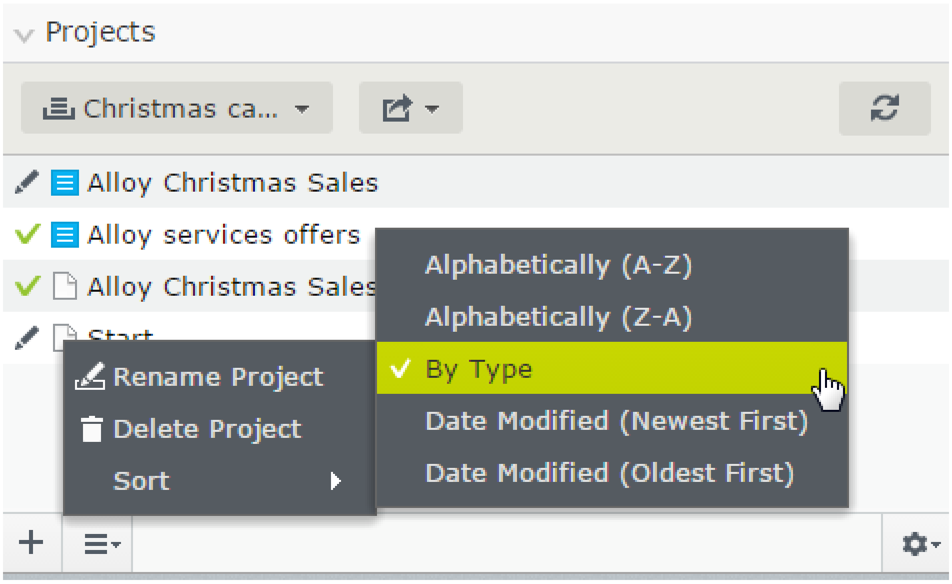
You can create new content or create draft versions of existing content, associate the content items with a project, and then either publish the project immediately or schedule it for later publishing.

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

Working with projects

Creating a project and adding content

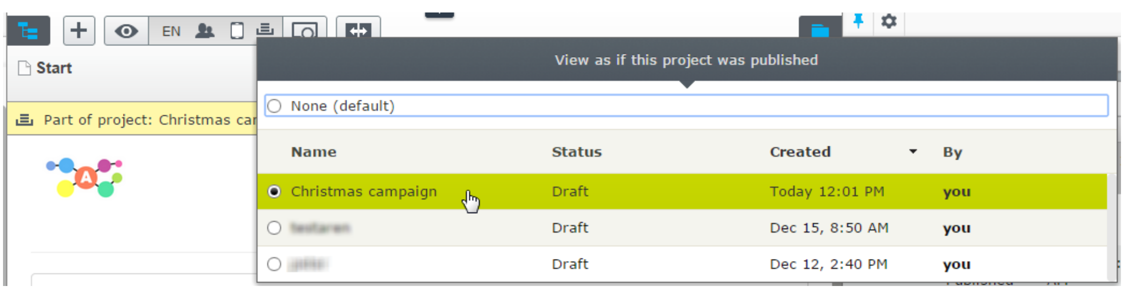
Create a project from the gadget menu and add desired content items through drag-and-drop. You can prepare the draft versions of the content items first, and then create the project and add them, or the other way around. Use **Sort** in the context menu to sort content items for a better overview, and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



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

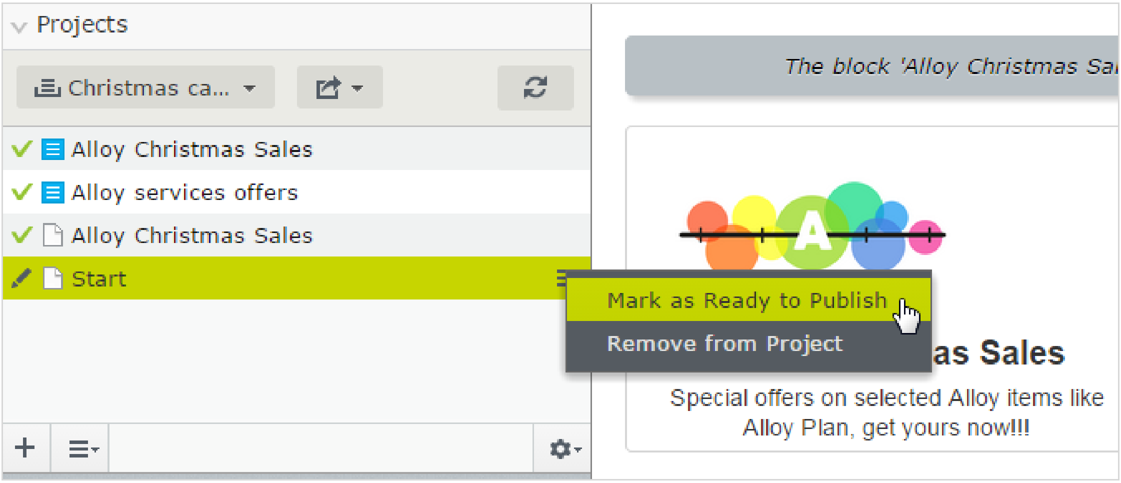
Previewing project content

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



Publishing projects

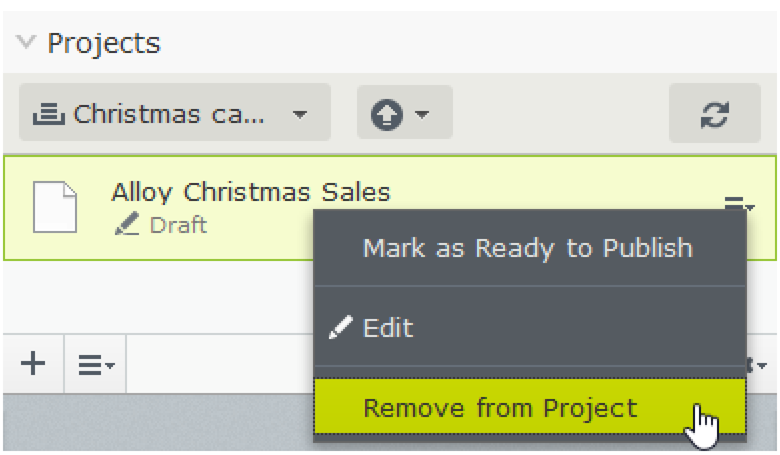
To be able to publish a project, all included items must first be set to status **Ready to Publish**. You can do this for each item from the publishing menu when editing, or from the context menu in the **Project** gadget.



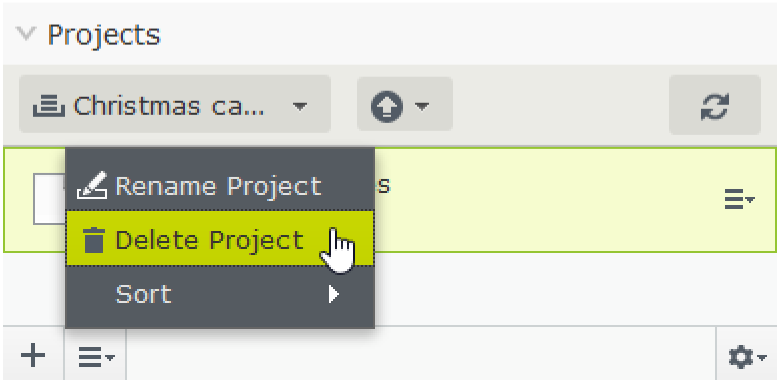
When all items are ready for publishing, you can publish the entire project directly, or schedule the project to be published later (if you have publishing access rights). If you need to change content in a scheduled project, select **Remove Scheduling and Edit**, change the content and re-schedule the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

Removing content and deleting projects

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



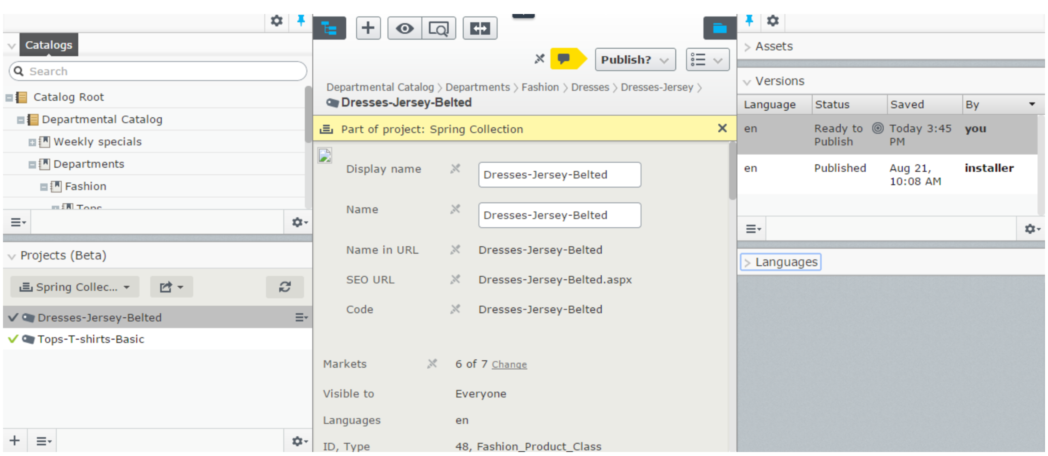
Delete a project by selecting the project in the projects gadget and then selecting **Delete Project** from the gadget's context menu. Projects are permanently deleted, but associated content items remain. When deleting a project scheduled for publishing, you have the option to either keep or remove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



EXAMPLE: Publishing a campaign using projects

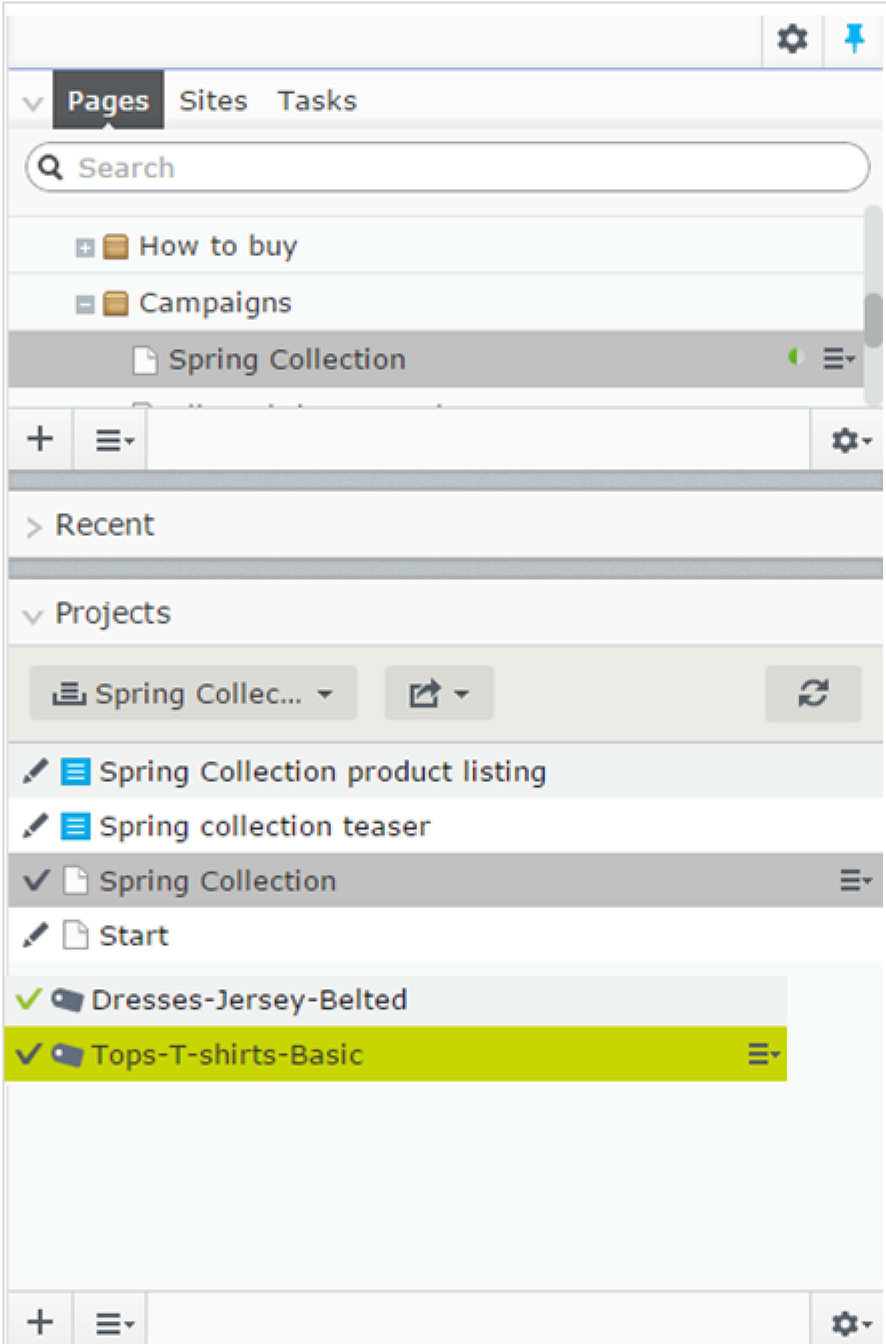
This example creates a fashion sales campaign with multiple content items on a website with Episerver CMS and Commerce. The campaign will go live on a specified date, and contain a landing page with a product listing block, two new products to be listed in the block, and a teaser block for the start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

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

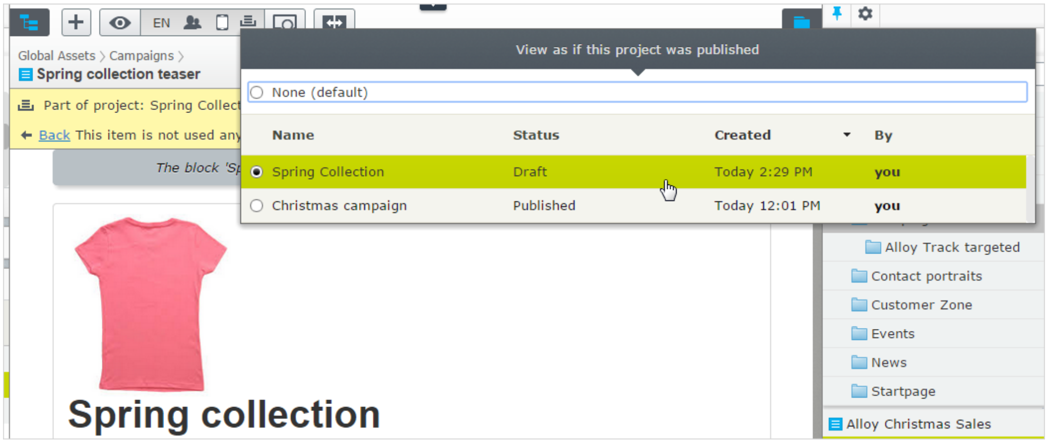


4. Switch to the CMS edit view and create the **landing page** for the *Spring Collection*. Add text and assets as needed, and drag the landing page to the *Spring Collection* project.

5. Create a **block listing the products** included in the spring collection, and include it in the landing page. Add the product listing block to the project.
6. Create a **teaser block** to be used on the landing page for promoting the new spring collection, and add the teaser block to the project.
7. Drag the teaser block to the start page, and add the **start page** to the project. The *Spring Collection* project now contains all the items to be included in the campaign.



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



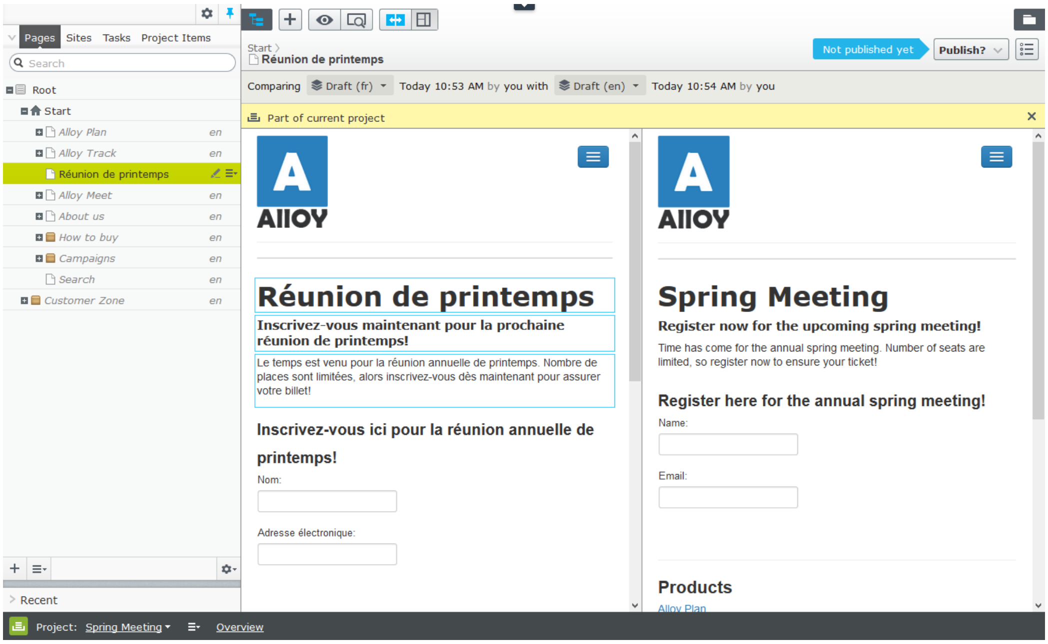
9. Schedule the project to be published on the defined go-live date for the campaign.

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

EXAMPLE: Managing multiple content language versions using projects

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

1. Create the page and the related forms block in English first.
2. Create a **project** and name it *Spring Meeting*.
3. Add the English versions of the page and the forms block to the project.
4. Enable and activate the desired languages (here French and German) on your website, if not already done.
5. Switch to the French language branch and create a French version for the page and the forms block.
6. Drag the French version of the content items into the *Spring Meeting* project.
7. Repeat the previous actions for the German language version. You now have six content items in the project; two for each language version.



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

CMS The projects feature

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

To work with projects, the projects feature must be enabled in the admin view.

The Digital Marketing Projects video shows a demo of the projects feature. (1:53 minutes)

Project features:

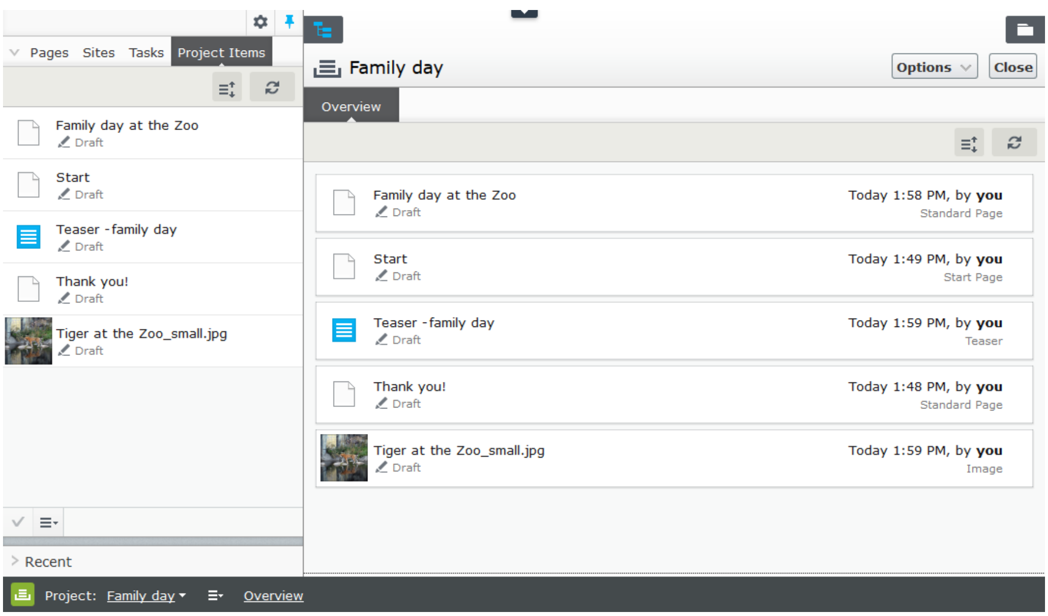
- The projects feature is enabled or disabled for the entire site and affects all users.
- Editing actions, such as creating and updating items, automatically associate a content item with a currently active project. Exceptions to this rule are moving items in the structure, setting content to expired,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

content items with the active project.

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

- Content associated with a project is locked for editing if another project is active.
- A **version** of content is associated with a specific project. This means that you can have a published version of an item not associated with any project; one draft of the same item belonging to a *Summer campaign* project, and another draft belonging to a *VIP campaign* project.
- You can add, remove and update existing items even if some or all of the items within a project are published.
- You can collaborate with other editors by adding comments, and replies to comments, to project items and to projects.

- The project interface consists of three main parts; the project bar at the bottom, the overview and the project items navigation pane to the left.



CMS

Projects user interface

The project bar

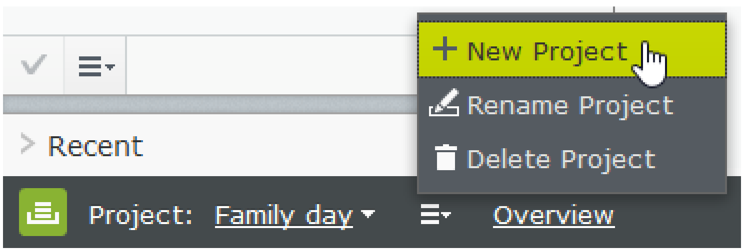
When the projects feature is enabled by an administrator, a project bar is displayed at the bottom of the CMS window.

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

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

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

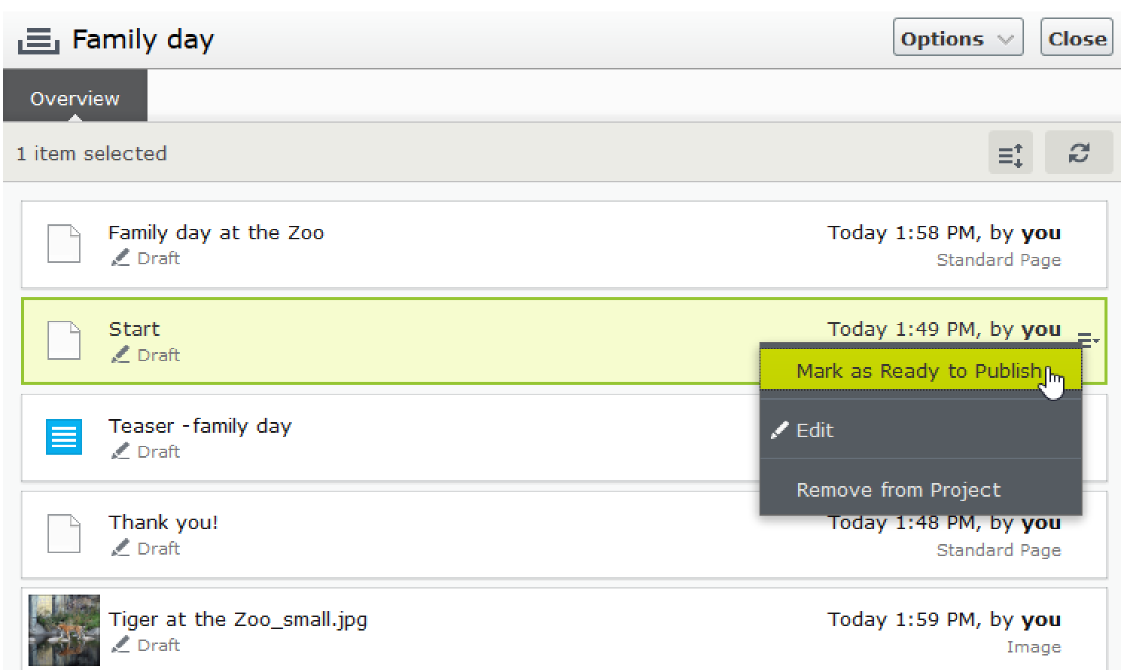
From the context menu on the project bar, you can create, rename and delete projects.



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

The project overview

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



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

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

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

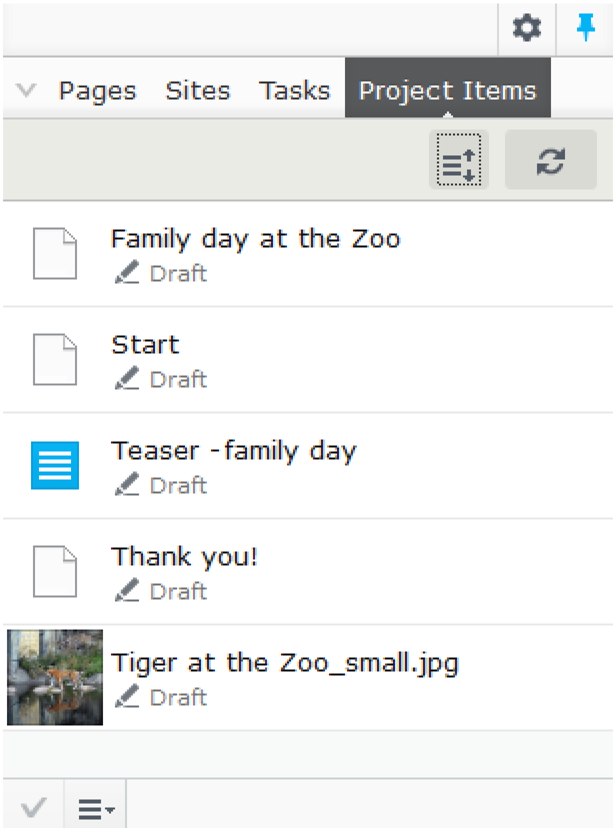
From **Options** in the overview, you can publish all items that are set to *Ready to publish* immediately or schedule them for publishing at a later time.

Show comments opens a view where you can select a project item and see a list of events connected to the item. You can add comments on each event and also reply to comments, see Working with comments for more information.

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

The project items navigation pane

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



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

Versioning when working in projects

Add the versions gadget to your user interface if you are working with multiple drafts and projects to see a list of the different versions.

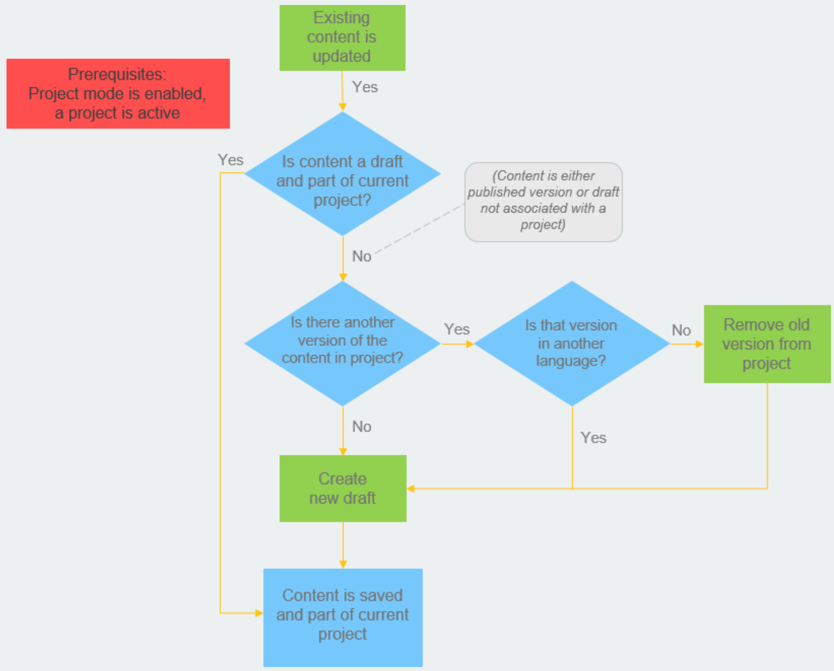
It is only *one version of a page* that is associated with the project. This means you can have a published version of a page and several drafts, and any one of these versions can be associated with the project. If the associated version is the published version, the project overview displays **Published**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

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

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

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

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

Project 'X' is selected	Result
	

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

CMS **Working with projects**

Creating a project and adding content

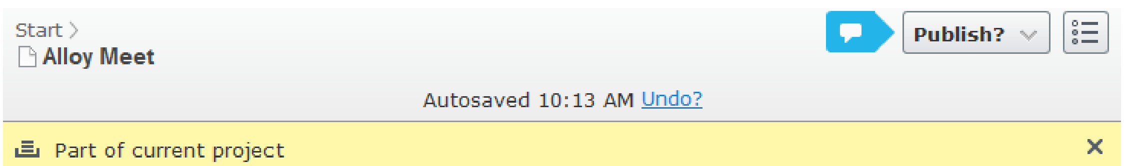
You create a new project from the context menu on the project bar.

When you create the project, it is automatically set as the active project, which means that editing changes (such as adding new content items, updating existing content, uploading an image and so on) are automatically associated with the project.

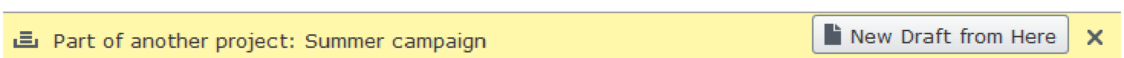
> A specific content version can only be part of one project. If you try to add the same version to another project, you are prompted to create a new draft. If you choose to create a new draft, the new version is then added to the project.

Editing content in projects

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



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



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

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

Uploading media to projects

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

Media is never auto-published when you upload it to a project, not even if your system is configured for auto publishing of media (see the **Auto publish media on upload** setting in System settings in the CMS Administrator Guide). Media associated with a project need to be published like any other content item.

Previewing project content

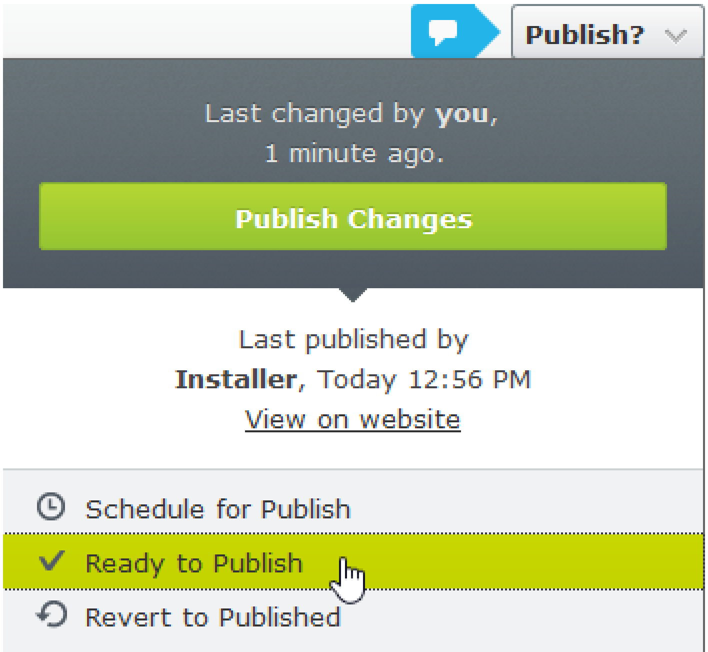
The preview option in the top menu lets you browse through the website as if the project were published. If you click **preview**, you preview the active project; to preview another project, change the project in the project bar. Previewing a project shows you either the draft associated with the project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

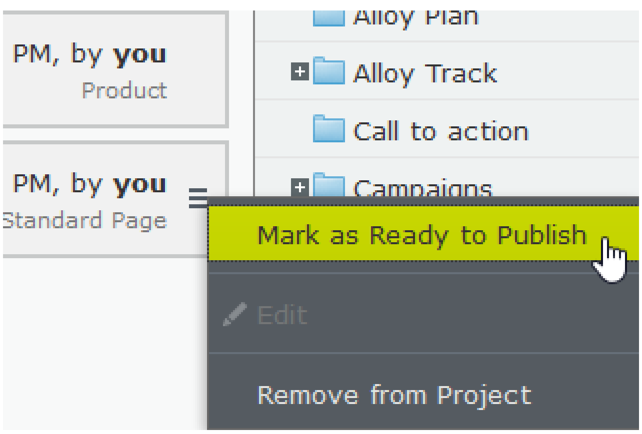
Collaborating on projects

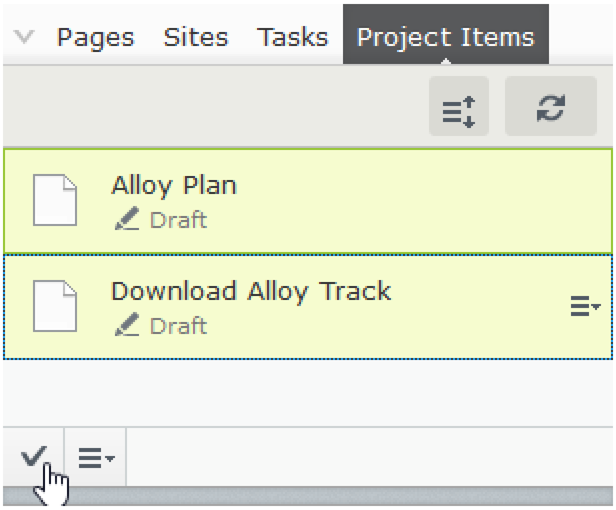
You can add comments on project items in the project overview and, for example, ask other editors to review an item. This feature is described in Working with comments.

Publishing project items

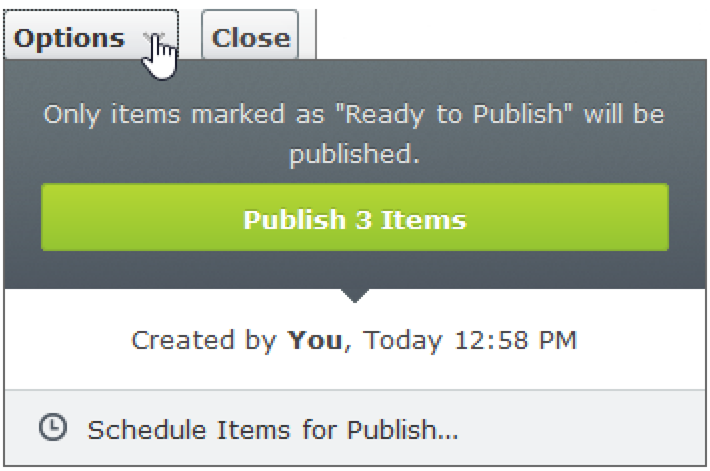
From the project overview, you can publish multiple items that are set to status *Ready to Publish*. You can set items to *Ready to Publish* either from the publishing menu while editing an item, from the context menu in project overview, or from the Project Items navigation pane. You can select multiple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


Publish?
Last changed by you,
1 minute ago.
Publish Changes
Last published by
Installer, Today 12:56 PM
View on website
Schedule for Publish
Ready to Publish
Revert to Published


PM, by you
Product
PM, by you
Standard Page
Alloy Track
Call to action
Campaigns
Mark as Ready to Publish
Edit
Remove from Project



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



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

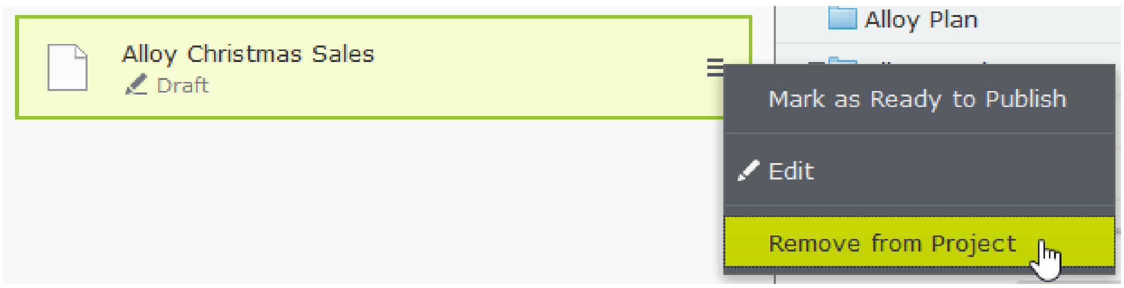
If you need to edit content that is scheduled, select **Remove Scheduling and Edit**, edit the content and reschedule.

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

Removing content and deleting projects

Removing content from projects

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



Deleting projects

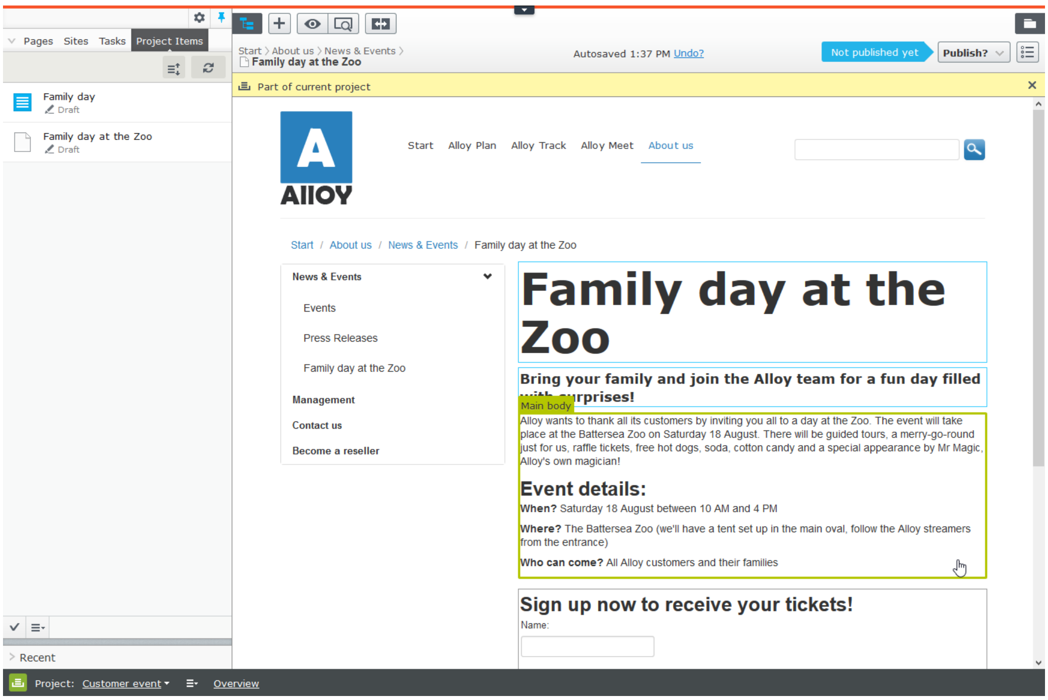
Delete a project by selecting the project in the project bar and then select **Delete Project** from the context menu. Associated content items are not deleted but are no longer associated with a project. You cannot recover deleted projects. When deleting a project with items scheduled for publishing,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

CMS **Examples for using the project functionality**

EXAMPLE: publishing a customer event using projects

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

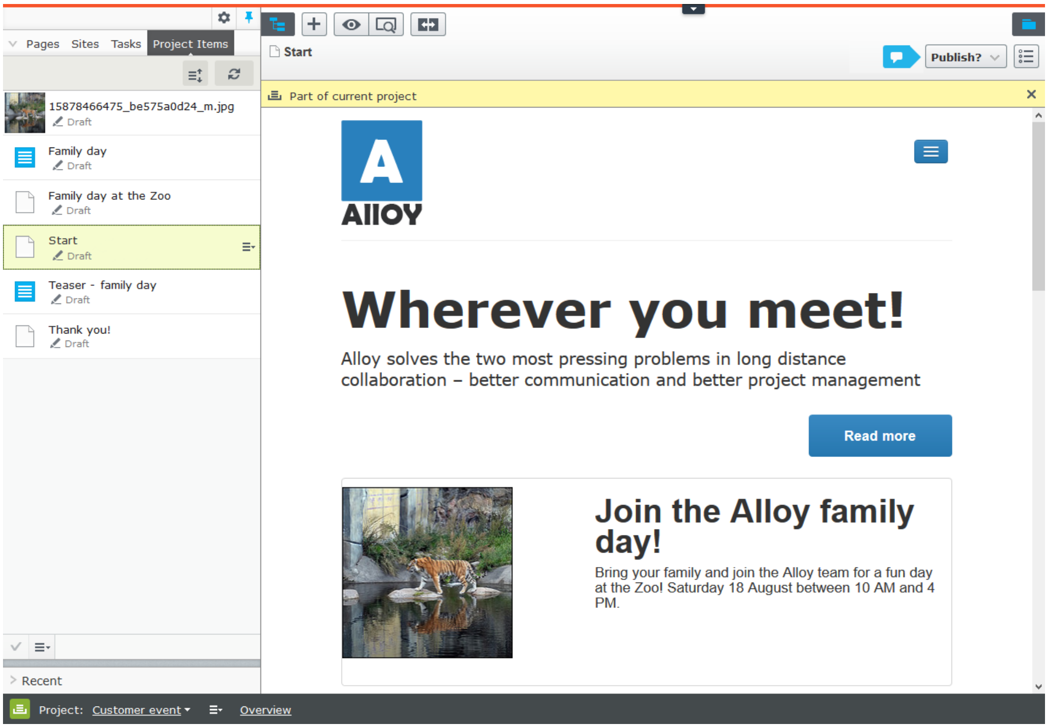
1. Create a new project for the event from the project bar and call it *Customer event*.
2. Prepare a page with information on the event. The page is automatically added to the project. You can set the page to *Ready to publish* or do that at a later stage.



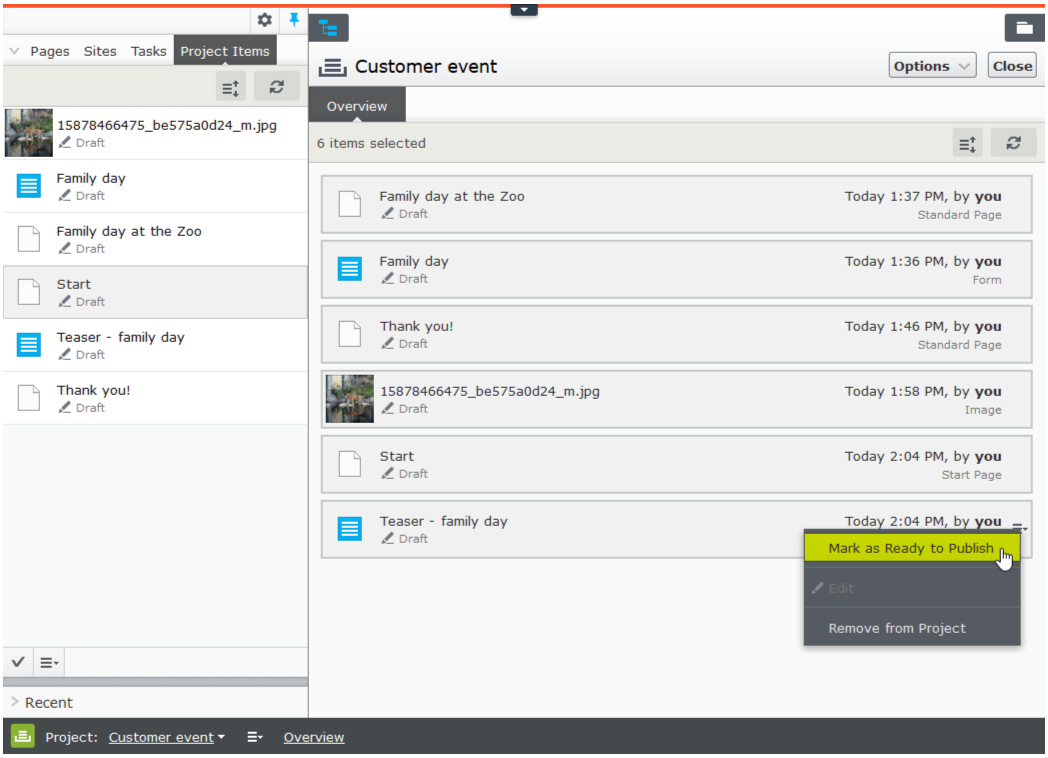
3. Prepare a thank you-page.
4. Create a registration form. On the sample site, this is done with a form block. Set up the form so that a visitor who registers for the event is directed to the thank you-page.

> You also can create block-based forms; see Episerver Forms in the online user guide.

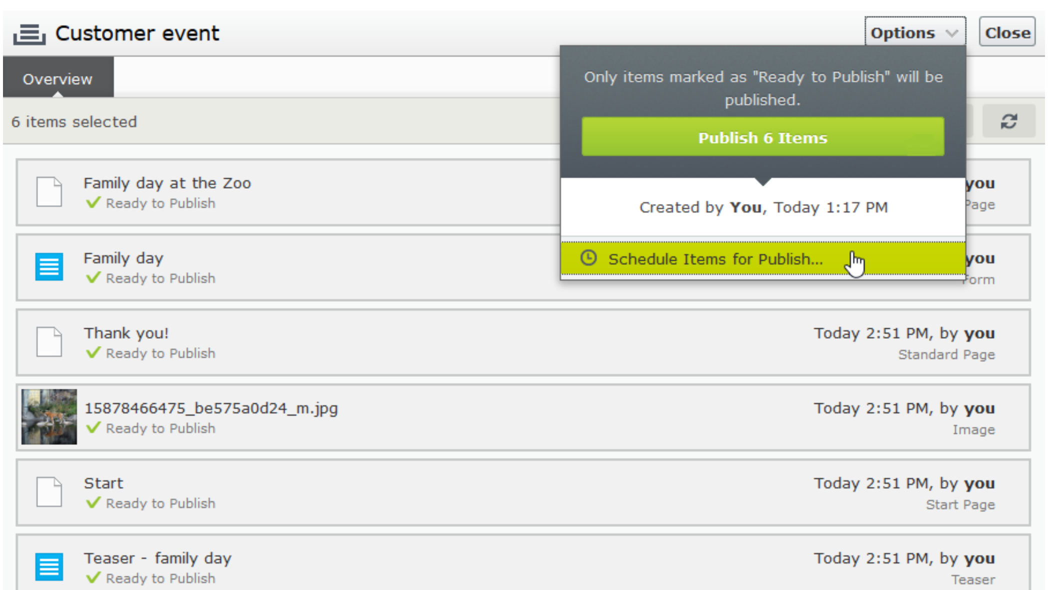
5. Create a teaser block to use on the start page for promoting the customer event and drag it to the start page. The *Customer event* project now contains all items related to the event.



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



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



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

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

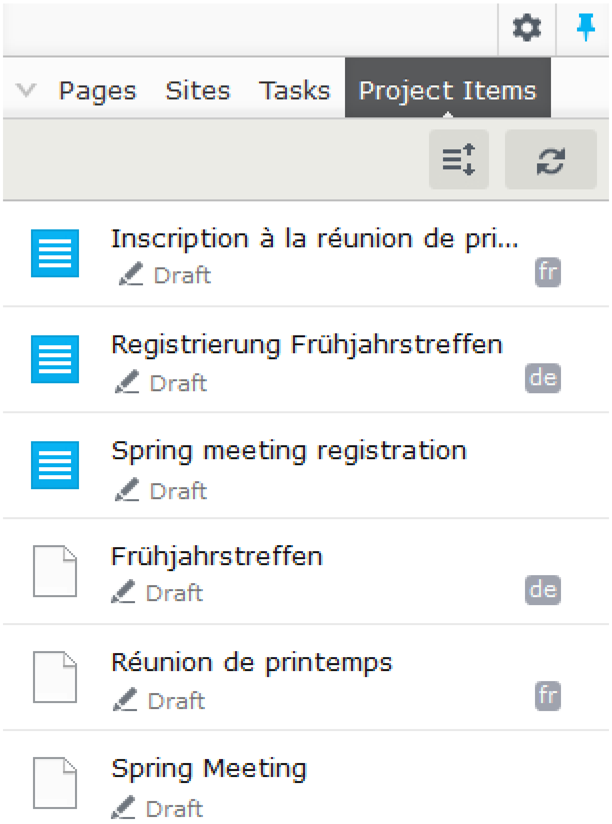
EXAMPLE: managing multiple content language versions using projects

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

1. Create a project and name it *Spring Meeting*.
2. Create the page and the related forms block in English first. They are automatically associated with the project.

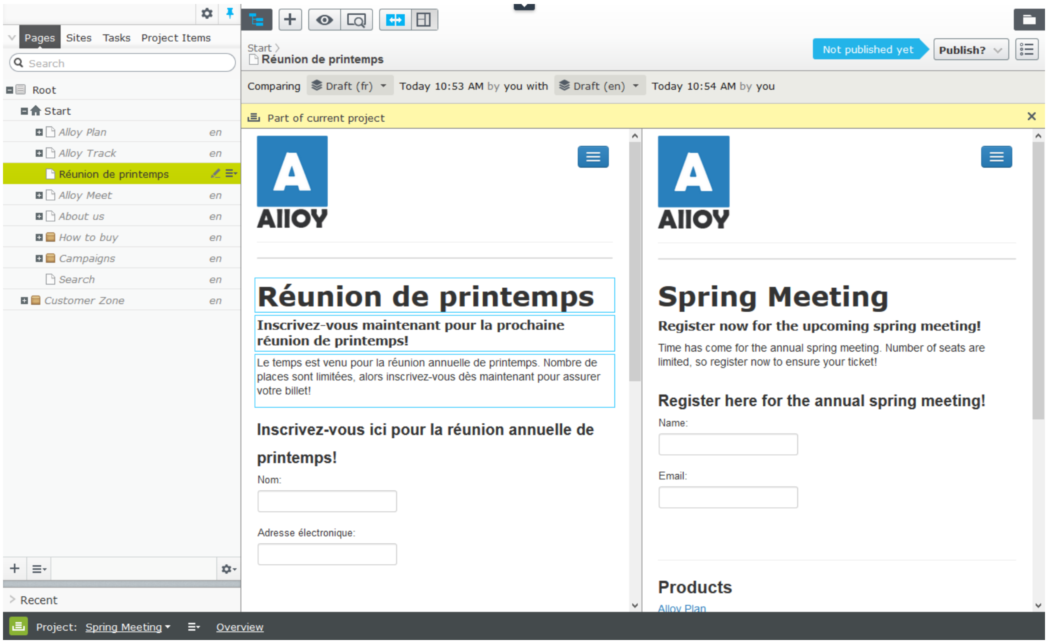
   > You also can create block-based forms; see Episerver Forms in the online user guide.

3. Enable and activate the desired languages (here French and German) on your website, if not already done.
4. Switch to the French language branch and create a French version for the page and the forms block.
5. Repeat the previous actions for the German version. You now have six content items in the project, two for each language. You can see all six items in the Project Items navigation pane.

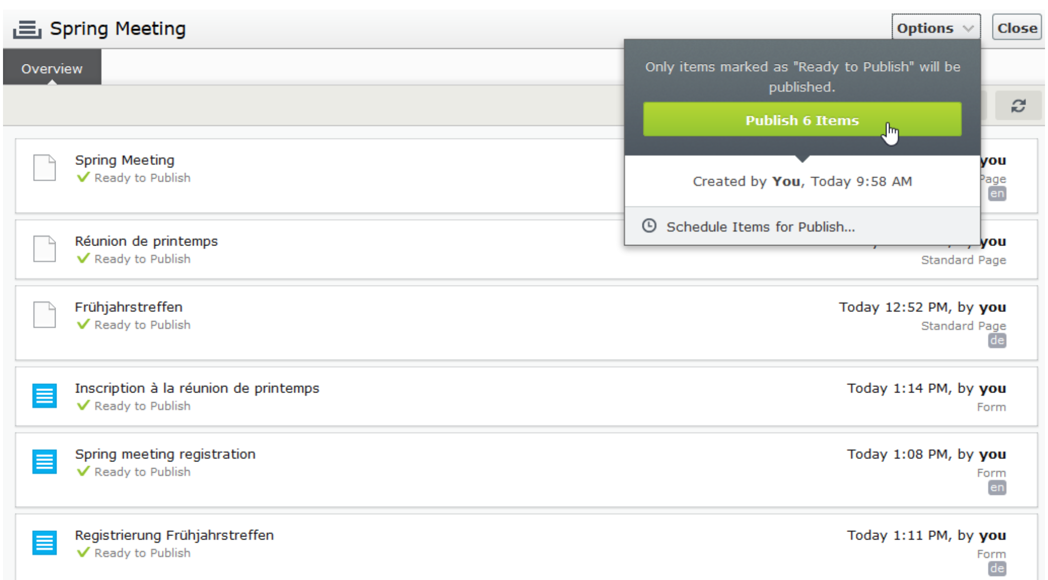


A language code is displayed for items in other languages. In the image above, the English site is selected under Sites; therefore, items in English are not marked with a language code.

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



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



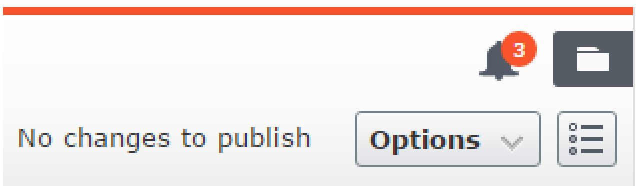
CMS

Working with comments

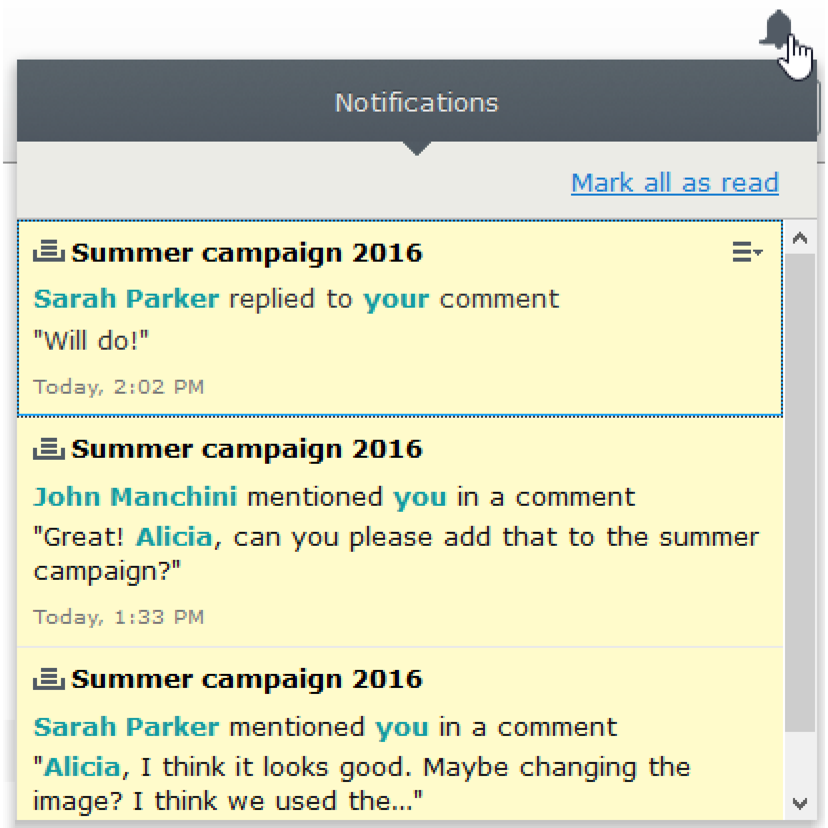
Comments facilitate collaboration between editors of a project. You can add comments on a project or on specific project items or actions, add information on changes you have made, ask other editors to review the item and so on. Other editors can view your comments and reply to them, and also add their own. You can also tag users in a comment.

A comment is only connected to the current version. As soon as a new version of the project item is created, the comment connected to the previous version disappears.

If another user has tagged you, made a comment on one of your actions or replied to one of your comments, you are notified in the user interface. The bell icon in the toolbar displays the number of new notifications you have. Click the icon to display a list of notifications. From the notification list, you can go to the project overview to read the comment.



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



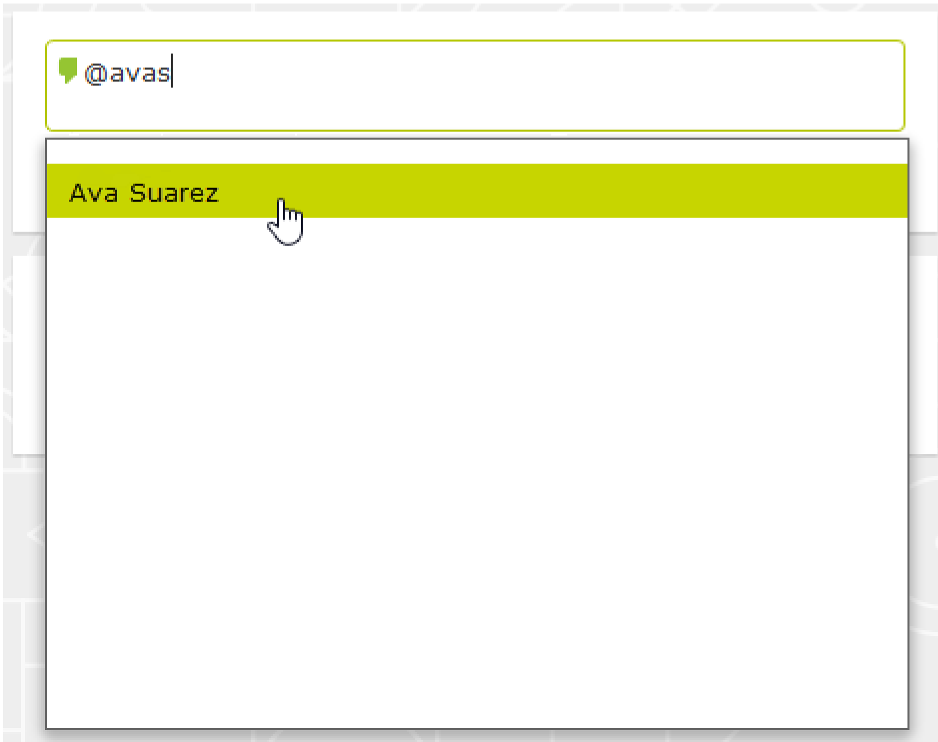
If your system is configured to use email notifications, you receive an email when someone else replies to one of your comments or replies, or if you have set a project item to **Ready to Publish** and someone else comments on this action. You also are notified if someone tags you in a comment. How often these notifications are sent depends on the system configuration.

Adding a comment to a project or project item

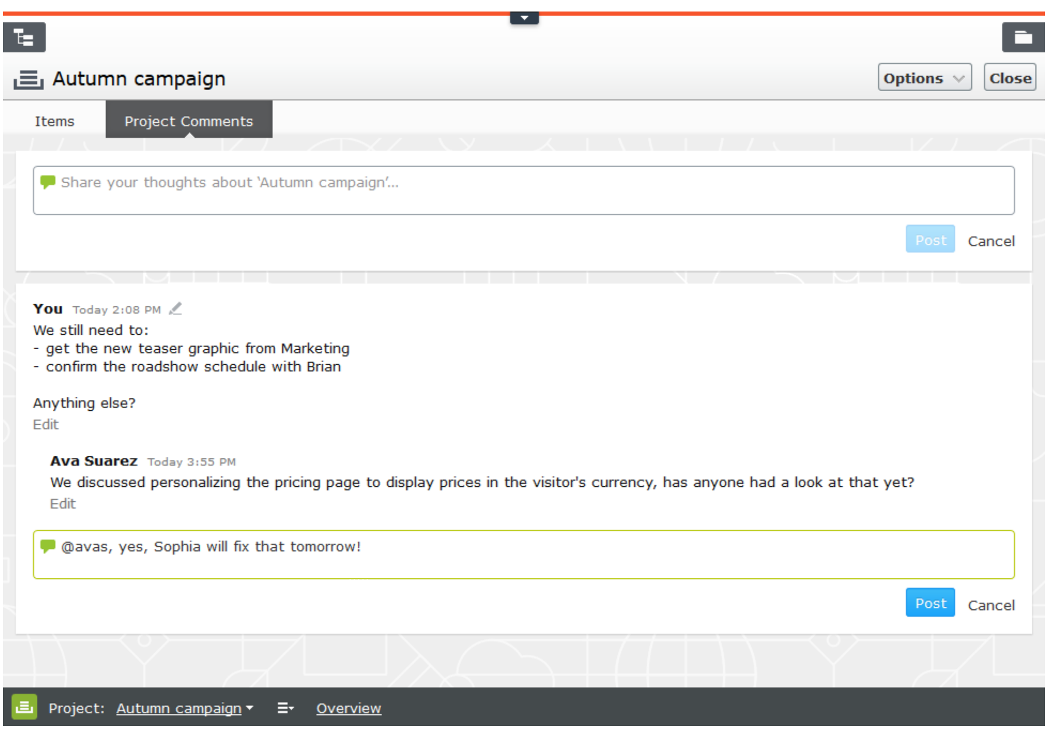
1. To add a comment to:
   - a project, select the **Project Comments** tab in the project overview.
   - a project item, select **Show comments** in the the **Items** tab of the project overview and then a project item. Items that already have comments have a comment icon .
2. **Add** a comment in the comment text box.

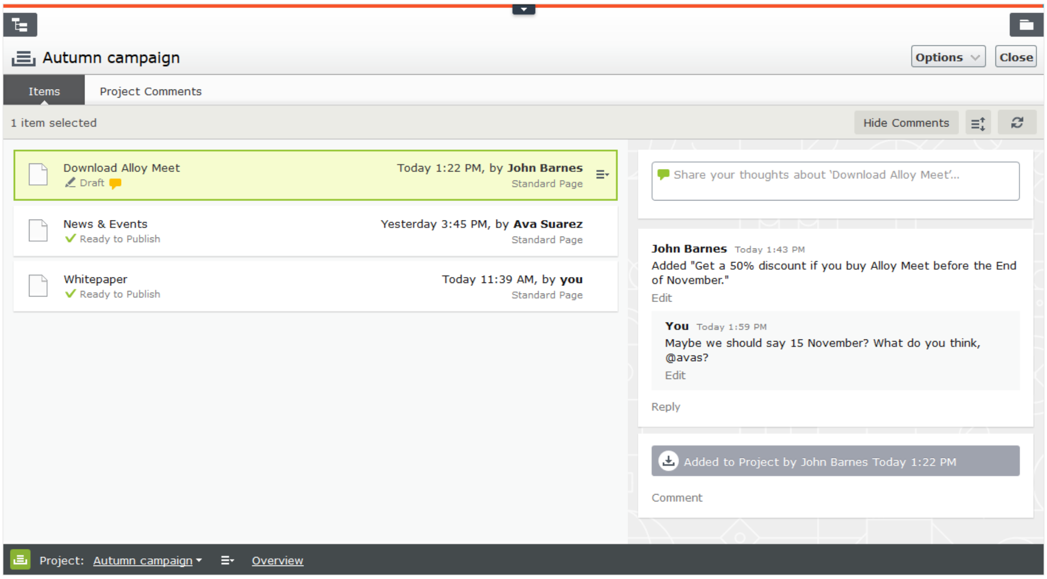
   > You need access rights to the item to view and post comments.

3. To tag another user, enter **@** followed by the user name. Select the user from the displayed list of suggested users. The tagged user receives an email notification and a notification in the user interface when logging in. You can tag any of the available users but the tagged user still needs access rights to the project item to see the actual comment.



4. Press **Enter** or click **Post**.





Replying to a comment

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

Editing a comment or reply

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

Deleting a comment or reply

You cannot delete comments or replies yet.

CMS Structuring the website

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

The page tree

By moving the mouse pointer over a page in the tree structure, information about the page, such as ID and page type, is displayed. A set of page tree symbols provides additional information about the structure.

The root page.

A start page.

A published page.

A page that links to another page on the same website.

A page that fetches and displays content from another page on the same website.

A page that links to an external website or a specific address.

A page containing a shortcut that is not linked anywhere; it only displays the text and is used to create a heading with no link in the menu.

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

A published page. This icon is displayed for project items, not in the Pages navigation pane.

A draft of a new page that is not yet published.

A new page that was scheduled for publishing; not visible on the website yet.

A page that has an expiration time that has passed; not visible on the website.

A page that is set to **Ready to publish**.

A page that is set to **Rejected**.

You do not have the rights to publish this item or the specific item version does not exist any-more. This icon is displayed for project items, not in the Pages navigation pane.

A previously published page, not visible on the website.

A page that is locked for editing for the logged-in user.

A page that is being edited by another user.

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

Moving, copying and removing pages

Moving a page

Use drag-and-drop to move a page, or select **Cut** in the context menu for the page you want to move, and select **Paste** for the destination page. You can also move pages by using keyboard commands Ctrl+x or Cmd+x, and Ctrl+v or Cmd+v.

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

Copying a page

Select **Copy** in the context menu for the page you want to copy, and select **Paste** for the destination page. You can also copy pages by using keyboard commands Ctrl+c or Cmd+c, and Ctrl+v or Cmd+v.

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

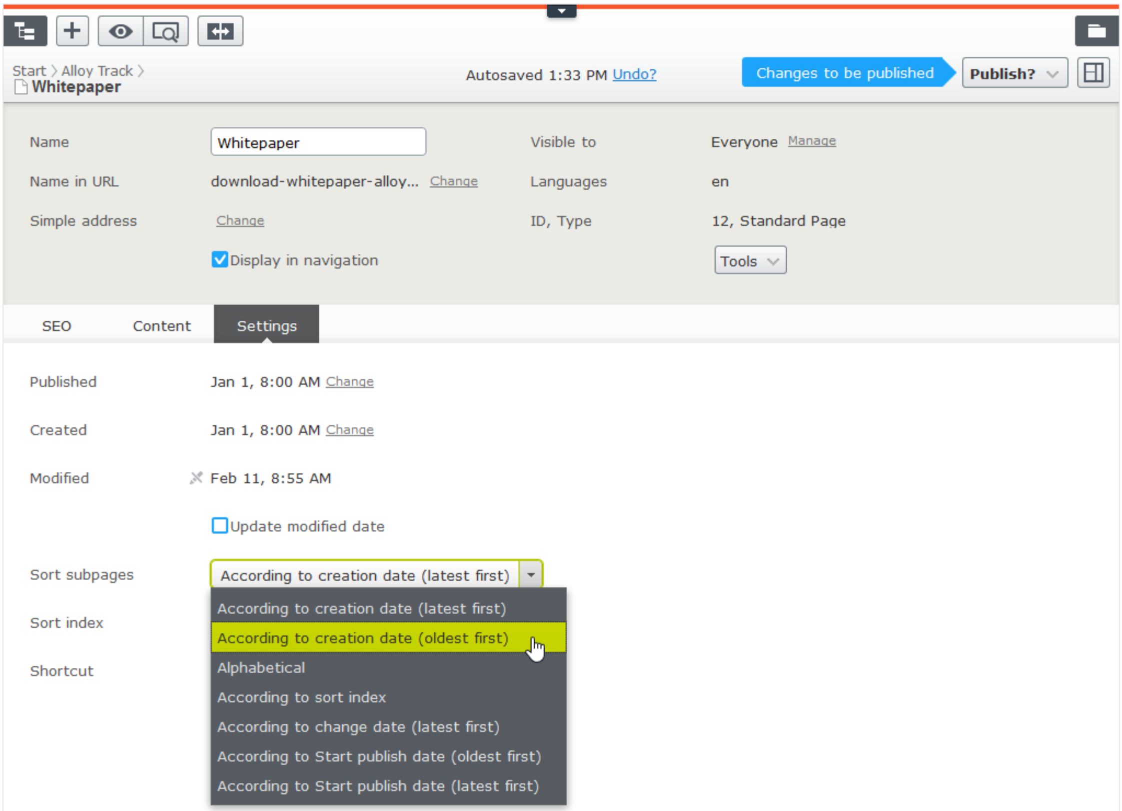
> When you copy and paste a page under the same node, the **Name in URL** property of the copied page is typically named [Name in URL1], which you need to change after copying.

Removing content

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

Sorting page order in menus

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



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

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

Sorting according to sort index

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

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

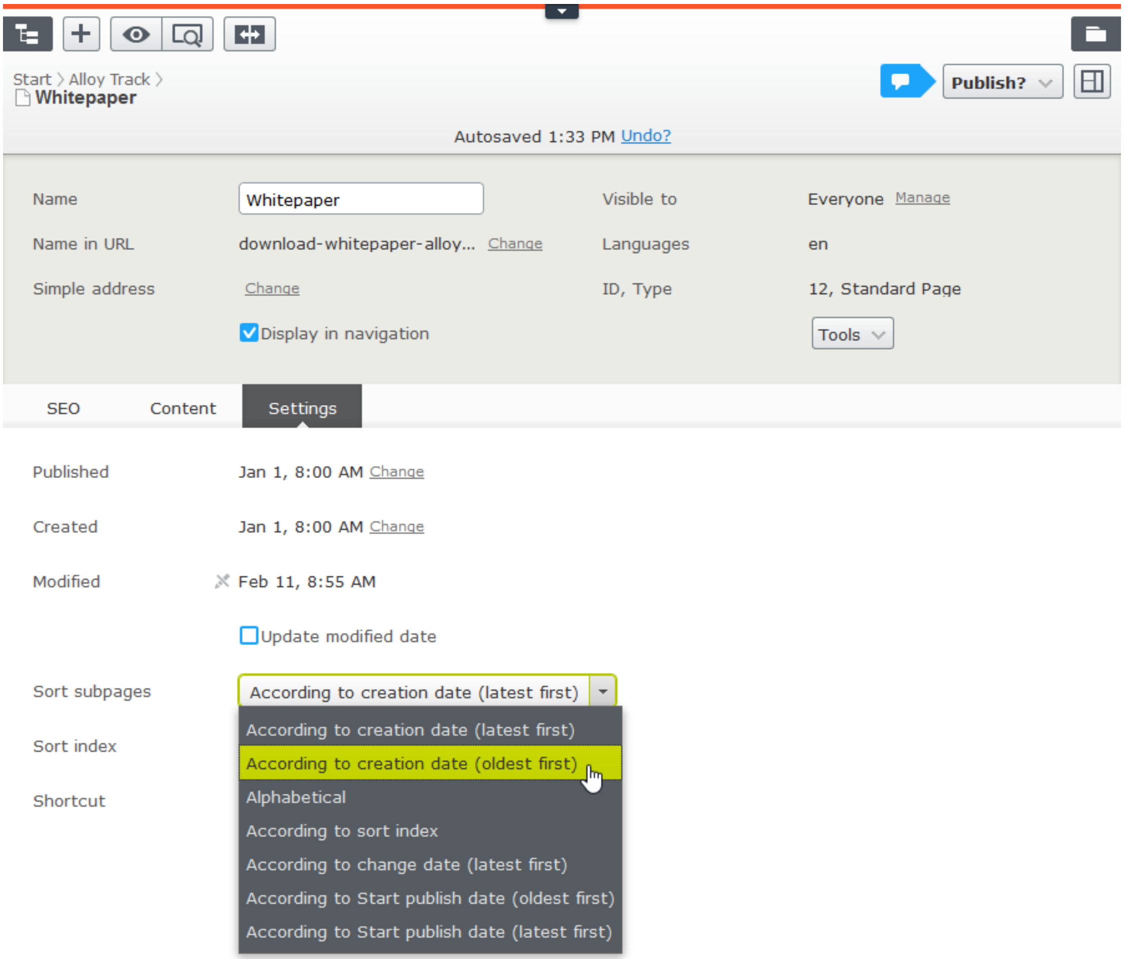
- If you move a page into a branch that is not sorted according to sort index, you get prompted to move the page and at the same time apply sort index as sort order for that branch. Confirm with **OK**. When you drag a page into a new position in a page tree branch, the sort index is automatically recalculated to fit the sort order of that branch.

- If you drop a page under a different parent page (with sort index set as sort order), the page is first moved or copied, and then sorted. The page remains in the tree in the position where it was first dropped.

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

Sorting according to sort index manually

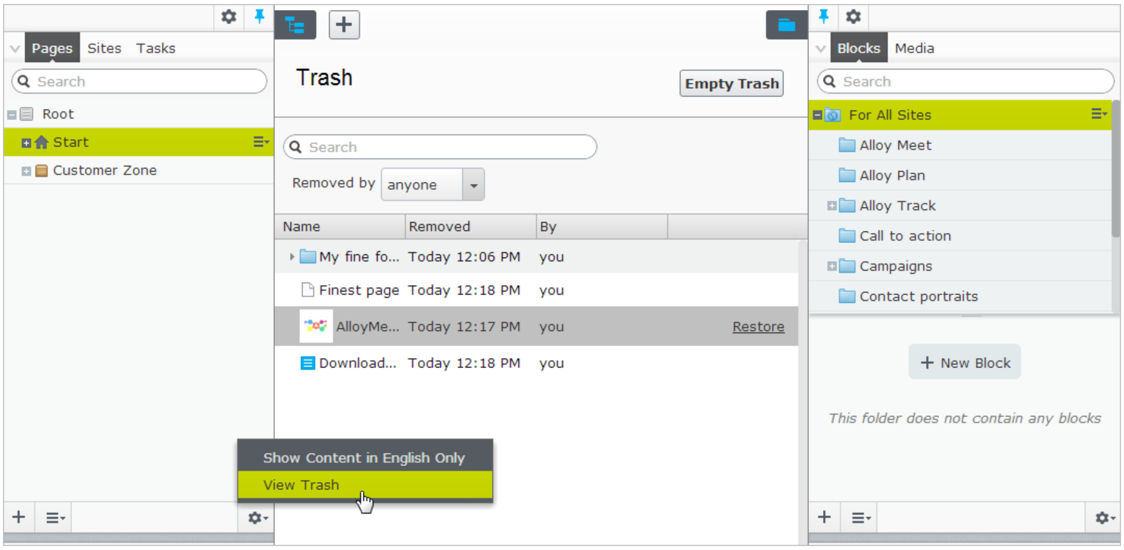
You can set the sort index manually for each child page. Open the page for editing, select the **Settings** tab and change the number in the **Sort index** box. The sort index number must be an integer, but there are no other restrictions. You should work with whole tens or hundreds to insert additional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



CMS

Deleting and restoring content

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

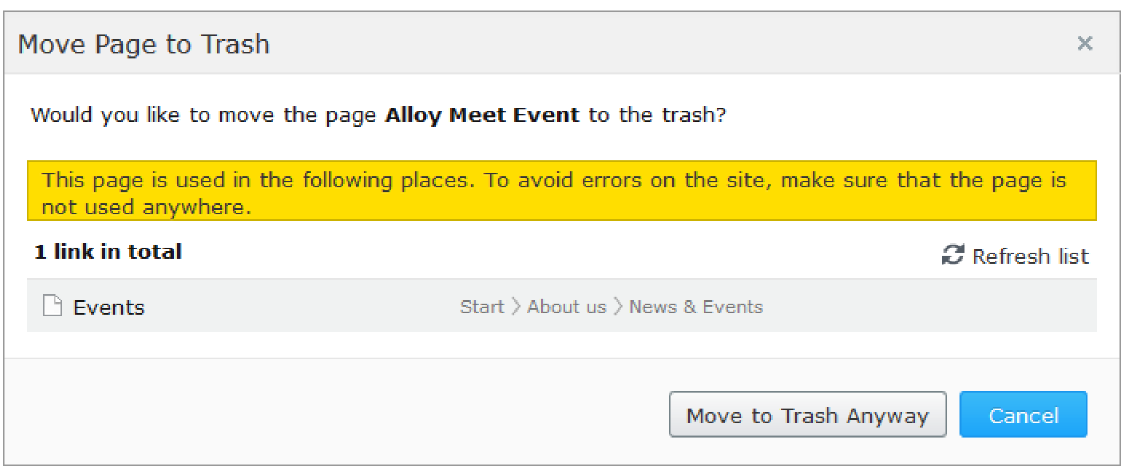


Episerver Commerce does not support trash management when deleting catalog entries.

Moving content to trash

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

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



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

Restoring content

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

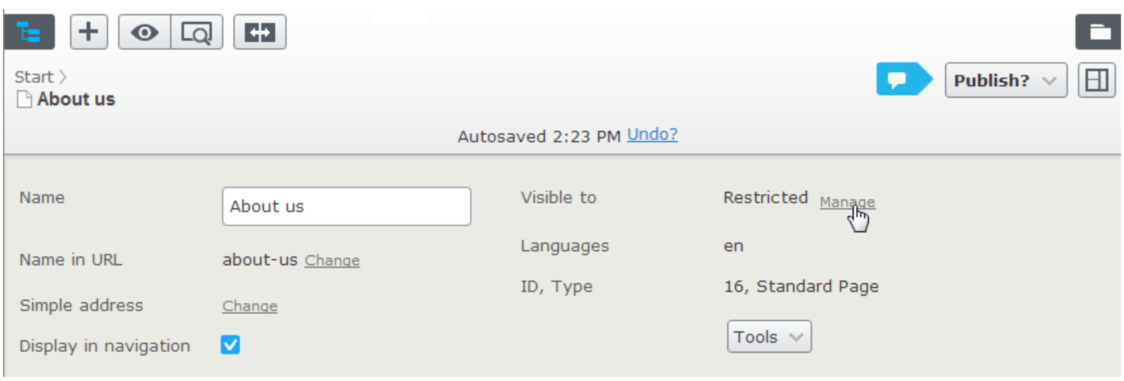
Deleting content permanently

Click **Empty Trash** to delete the trash content permanently (may require administrative access rights). You can automatically empty the trash at a regular time interval using a scheduled job.

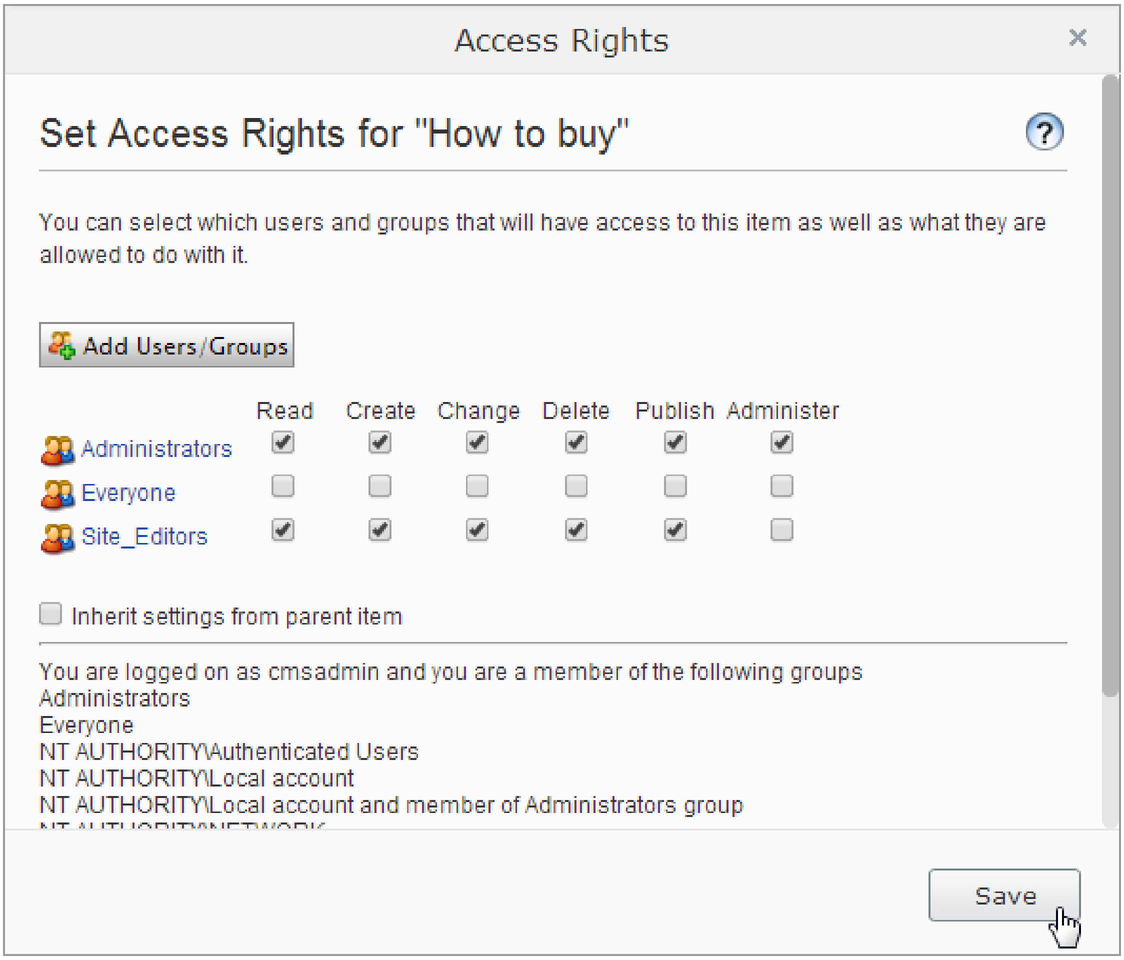
CMS Setting access rights from edit view

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

To set access rights, open the item in the All properties edit view. The **Visible to** option displays **Everyone** for content that is publicly available on the website, and **Restricted** if access limitations apply.



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



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

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

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

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

CMS Assets

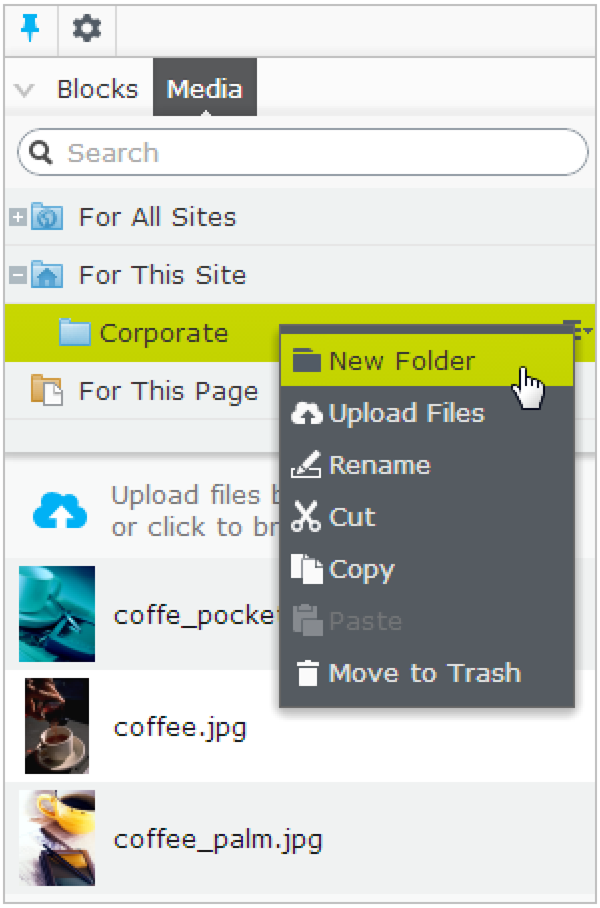
Assets can be, for instance, content of the type media files, images, documents, blocks or products from the catalogs in Episerver Commerce. Assets are available from the assets pane in both CMS and Commerce, making it easy to drag-and-drop items, such as images, blocks or products into, for instance,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

You can work directly with content from the assets pane, for instance, edit images or blocks, or create folders to organize content items. The context menu will provide different options depending on the type of assets selected. How to work with content items in the assets pane is described in the sections Folders, Media and Blocks.

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

CMS Folders

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



Note that by default, **media and blocks share the same folder structure**, meaning that if you create a folder under Media, the same folder is also created under Blocks.

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

- **For All Sites**. Content here is available for all websites in a multi-site installation.
- **For This Site**. Content here is available only for a specific website in a multi-site installation.
- **For This Page** or **For This Block**. Local folder where content is available only for a specific page or block, and cannot be accessed from other pages or blocks. Useful, for instance, if you have images for a specific purpose which must not be used elsewhere.

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

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

Creating, renaming and moving folders

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

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

Deleting folders

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

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

Setting access rights for folders

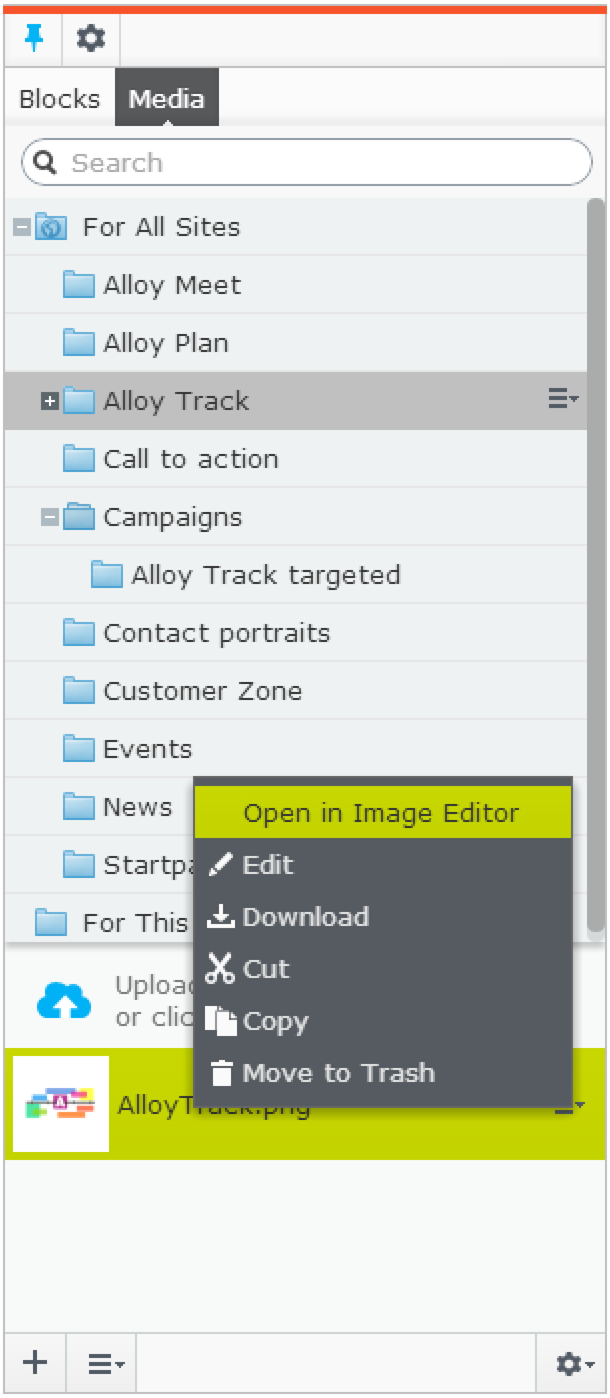
The predefined global folder is available to everyone by default. Local folders inherit the access rights from the content (page or block) to which they are associated. It is possible to define access rights for specific folders in a structure. Setting access rights for folders is done from the admin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

Managing folders in multiple languages

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

CMS Media

Media in Episerver are files that can be, for instance, an image, a document (such as a pdf document or a Word document), a video or mp3 files. Media is managed from the media library on the **Media** tab in the assets pane. Here you can create folders and upload media files. You can then make use of your media by dragging them into an Episerver CMS page or a block, or associating them with a product in Episerver Commerce.



Searching for media

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

Uploading media

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

> Depending on your implementation, media files may not be automatically published when uploaded. To implement automatic publishing of uploaded media, editors who upload must have publish access rights for the folder to which the media is uploaded. See Access rights for more information.

Previewing media

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

Downloading media

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

Editing metadata for media

Available metadata fields depend on the implementation; for images they can be, for instance, photographer, description and copyright information. Select **Edit** for the desired media file in the **Media** structure, and then the All Properties editing view to edit the metadata properties.

Renaming media

Select the media file in the **Media** structure and then the All Properties editing view, and change the **Name** and the **Name in URL**.

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

Replacing media

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

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

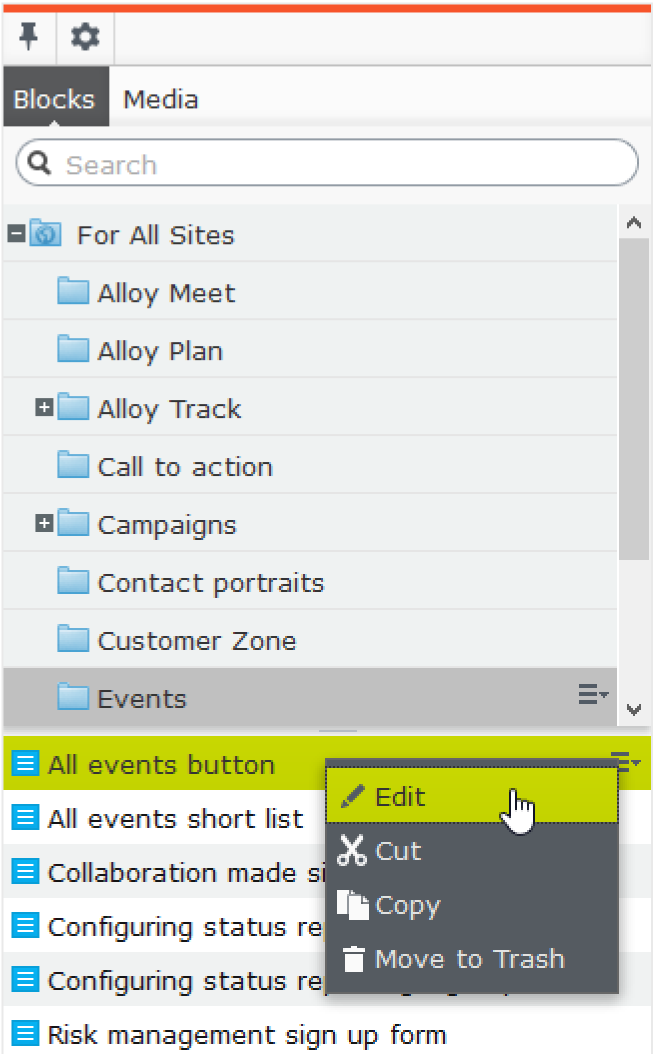
Managing media file versions

Versions for media files are managed in the same way as for other types of content, that is, by using the **Versions** gadget. Refer to Publishing and managing versions for more information.

CMS Blocks

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

Blocks are managed from the **Blocks** tab under the assets pane in Episerver CMS, where you can create new blocks and organize them in folders. You can then utilize blocks by dragging them into the content area of Episerver CMS pages. You can manage block versions like other types of content, and blocks can also be personalized to be displayed for selected visitor groups.



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

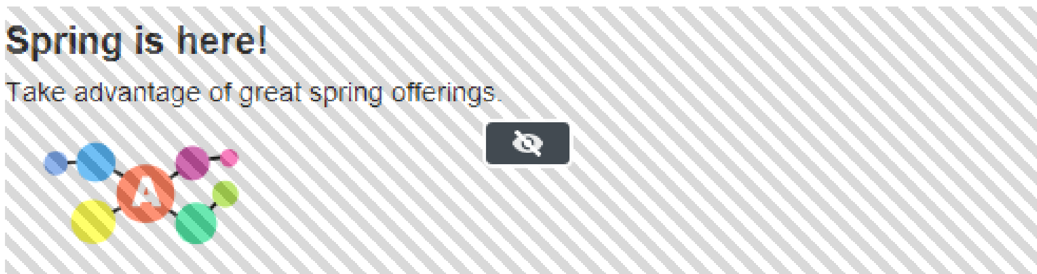
Creating a block

To be able to create blocks, editors must have **Create** access rights on the **root** directory of the website.

Creating a block from the Blocks tab in the assets pane

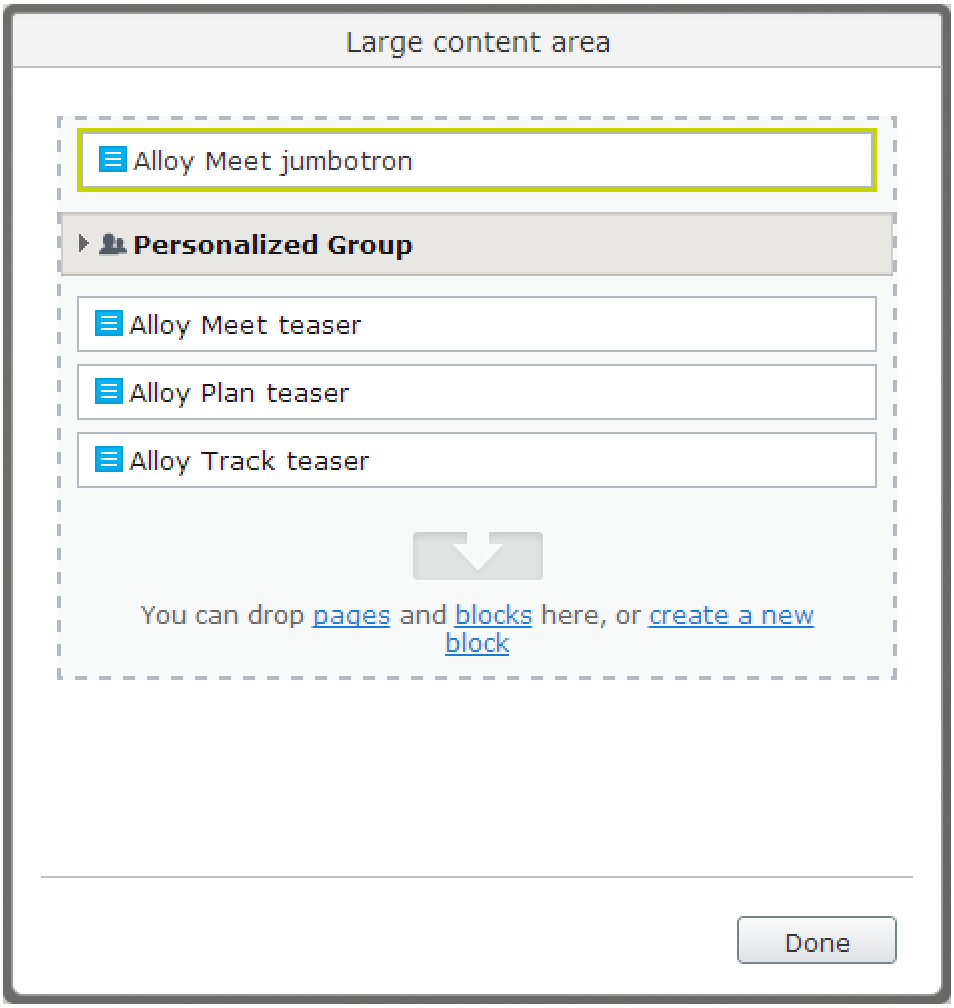
When using this option, the block is saved in the block folder structure, and it is available for other pages on the website.

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



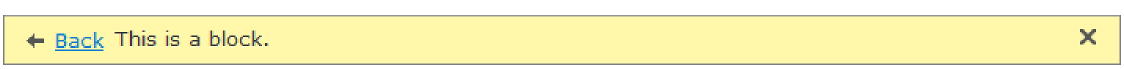
Creating a block directly from a content area

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



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

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



Editing a block

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

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

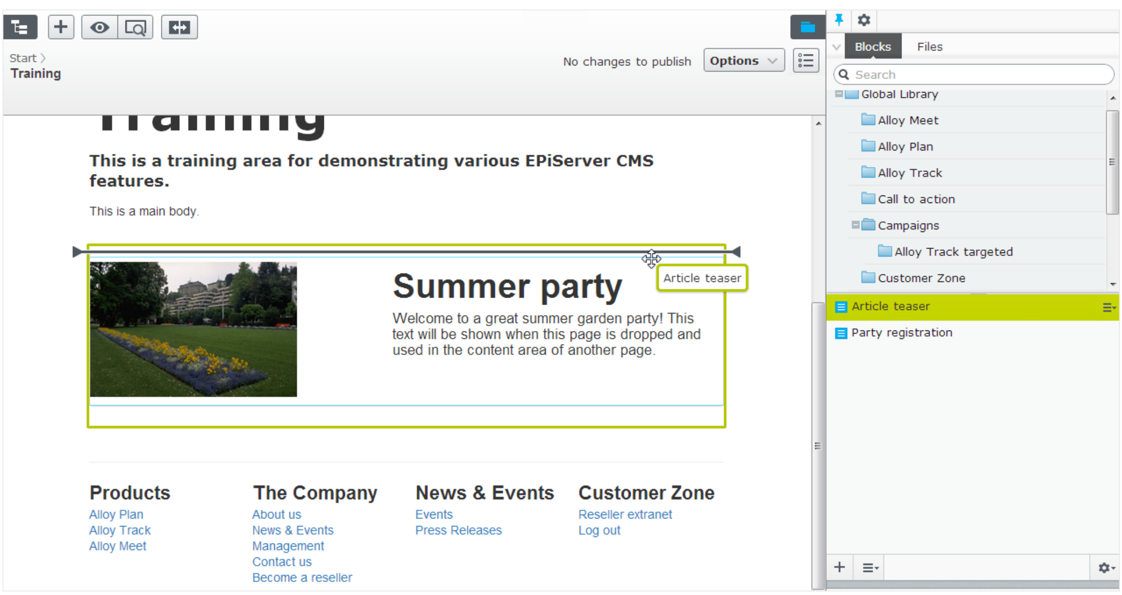
1. Select the desired block to edit, and select **Edit** in the context menu.
2. Depending on the type of block, change the content as appropriate.

   If you want to rename the block, use the All Properties editing view.

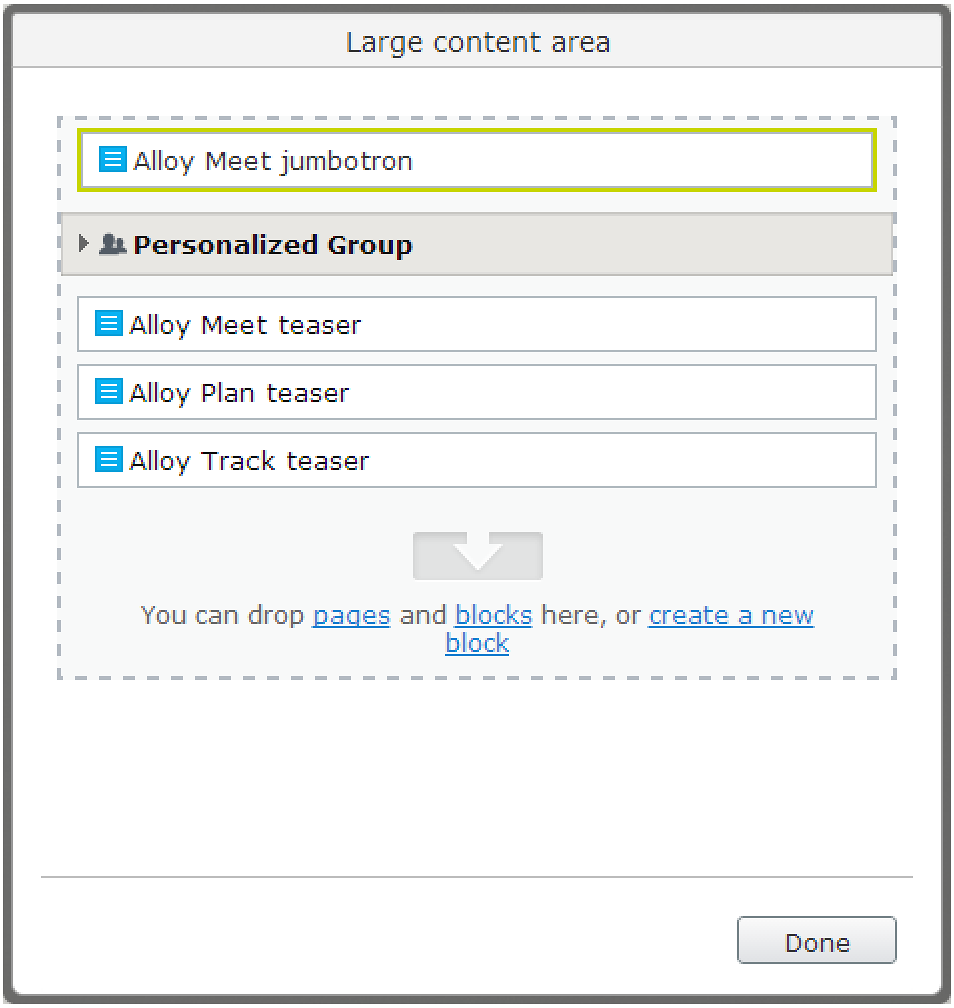
3. Publish the block immediately or schedule for the changes to be published later.

Using blocks in content

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

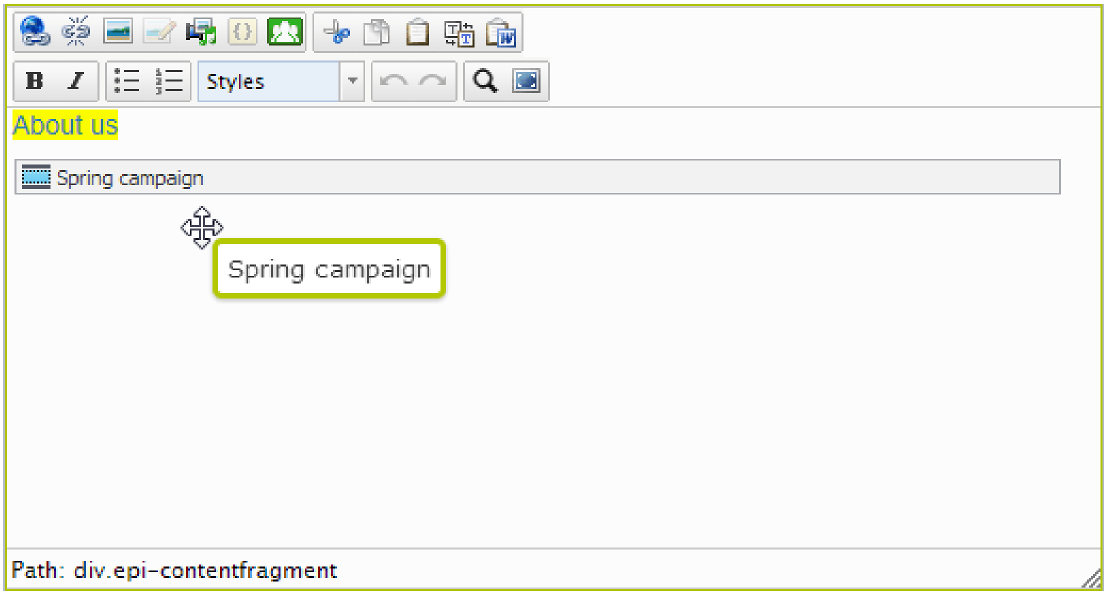


You can add several blocks to the same area. Drag the block above or beneath an existing block, and drop it when the separator appears. The blocks can be rearranged later. It is also possible to add blocks to a content area from the All Properties editing view.



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

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



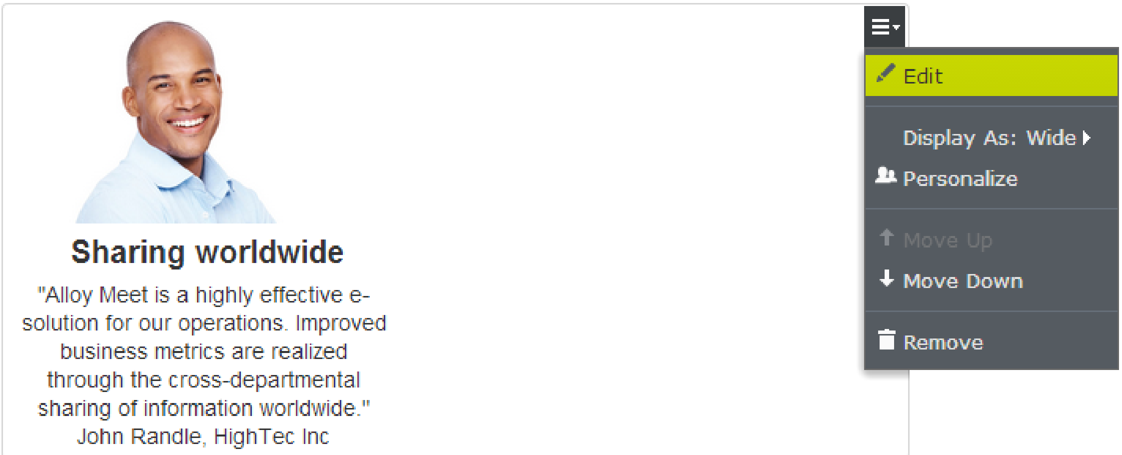
To **remove** a block from a content area, select **Remove** from the context menu.

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

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

Arranging blocks in a content area

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

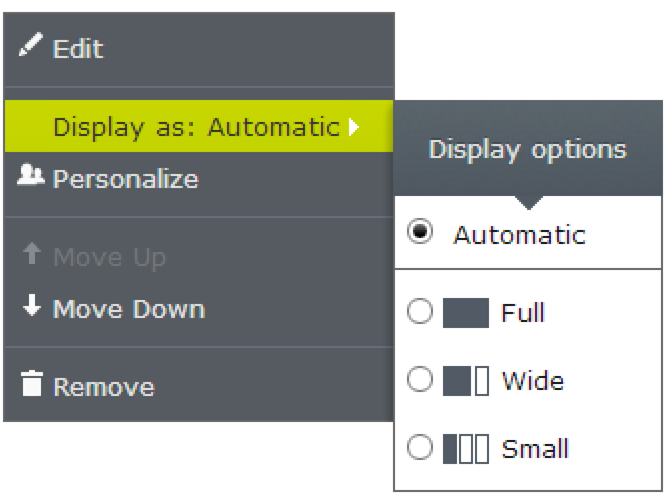


Displaying blocks in different styles

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

The following options are available:

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



Moving, copying and removing blocks in folders

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

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

Versions, content languages and access rights for blocks

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

See also Self-optimizing block in the online help.

CMS Managing multiple languages

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

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

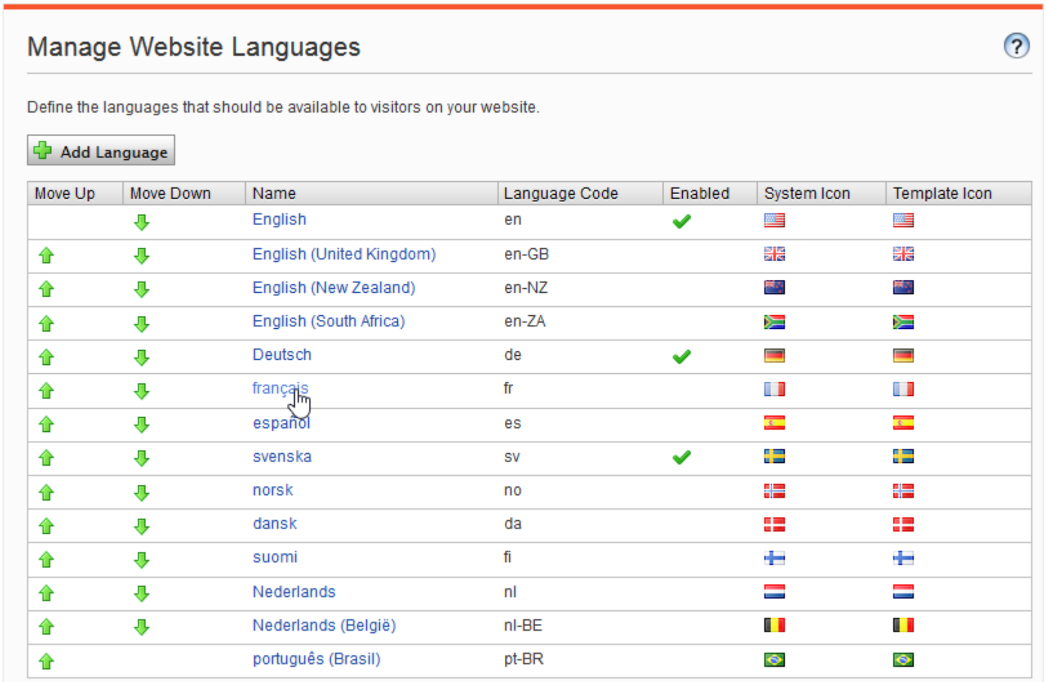
Enabling content languages

Usually a website has a default or "master" content language set up at the time of installation. In addition to this, you may add multiple content languages as required for your website. The enabling of languages is done in the steps described below. **Note** that you need administrative access right to access the administration interface in Episerver CMS.

1. Enabling a language on the website

This step activates the language to make it available for further configuration in CMS and Commerce.

1. In the admin view, go to the **Config** tab > **Manage Website Languages**.
2. Click on the desired language in the list (you can add a language if the desired one is not available in the list).

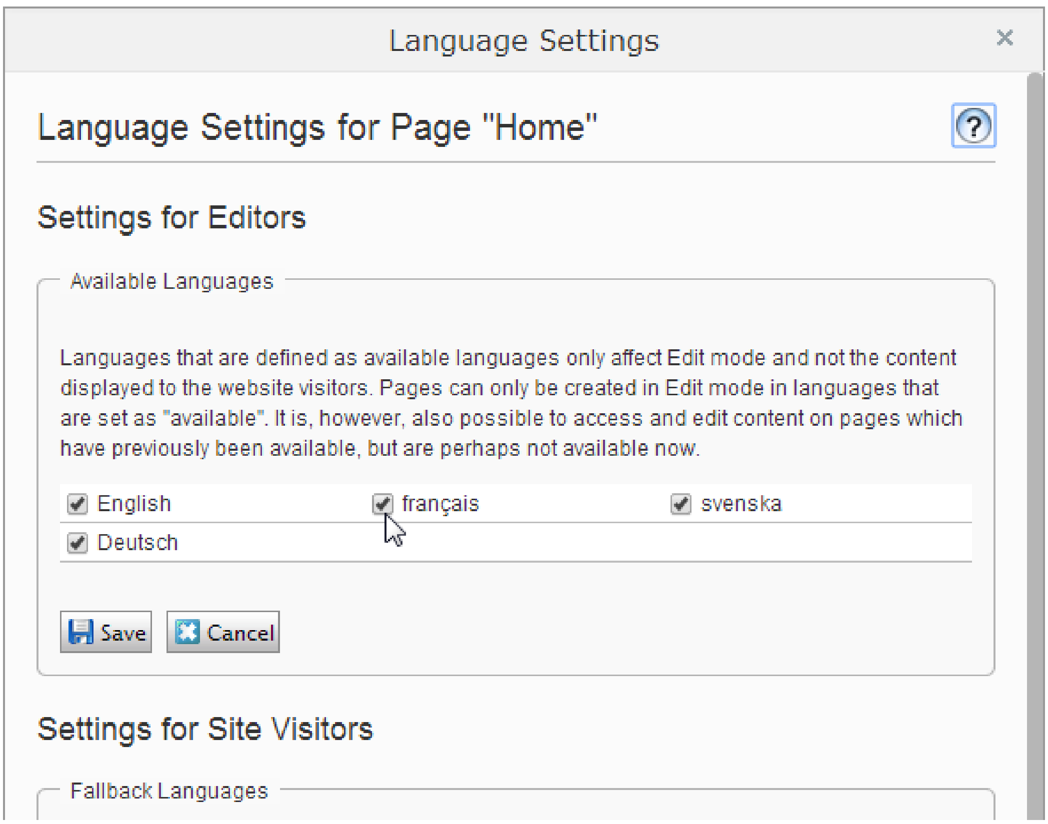


3. Select the **Enabled** check box and click **Save**.

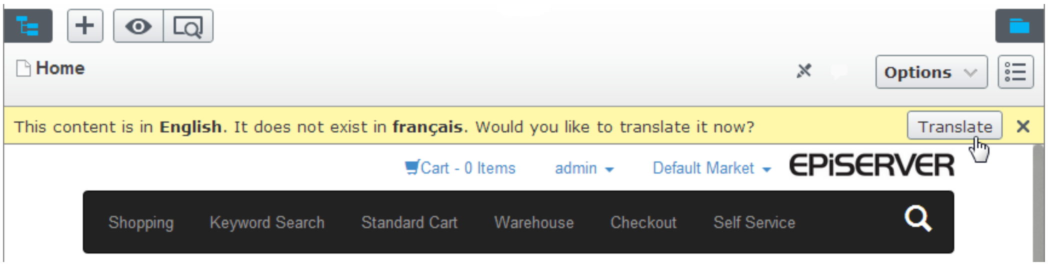
2. Enabling a language for editing in CMS

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

1. In the CMS page tree, select the root page for the branch for which you want to enable the language. In this example, we want "French" to be available for the entire site, so the language setting is defined on the start page.
2. Open the page in **All Properties** editing.
3. Select **Tools** and **Language Settings** in the header.
4. Under **Available Languages**, select **Change**.
5. Select the language you wish to enable, click **Save**, and close the dialog.



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



Once the language has been enabled as described above, it is available for content translation.

User interface languages

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

Commerce Commerce and multiple languages

Refer to Multi-language management in the Commerce section for information on how to work with multiple languages if you have Episerver Commerce installed.

Addons Find and multiple languages

Refer to Optimizing multiple sites and languages for information on how to work with multiple languages if you have Episerver Find installed.

See also

- Refer to Translating content for information on how to translate CMS content into different languages.
- Refer to the Languages add-on for more information on how to extend the functionality in Episerver for translating content into multiple languages.

CMS Translating content

When you have enabled the desired language, you are ready to translate existing content, or create new content in a specific language. Content here can be, for example, pages or blocks on an Episerver CMS website, or product-related content on an e-commerce site. When a language is enabled in Episerver, content properties that are not **global** are available for translation.

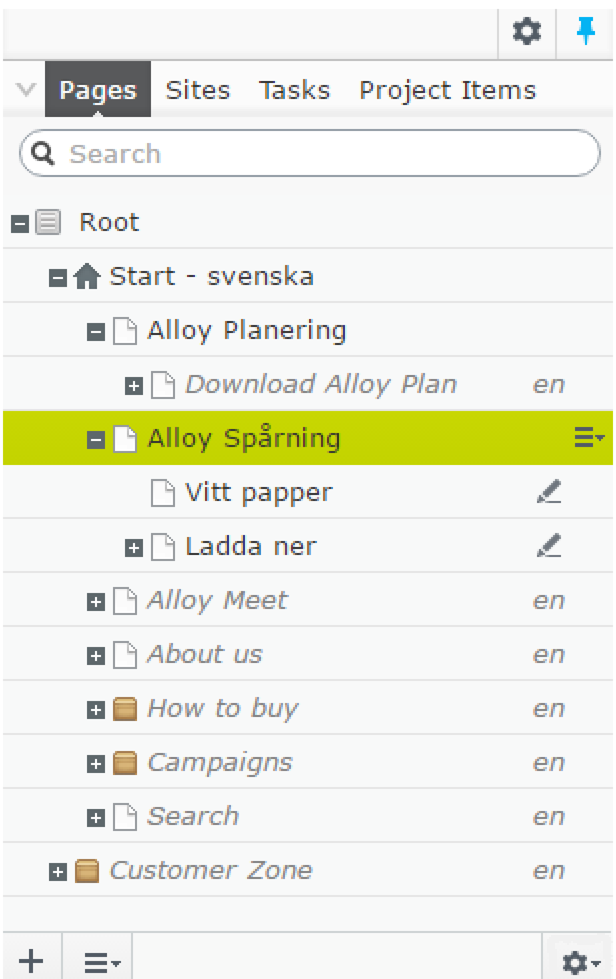
To prevent editors from accidentally creating content in the wrong language, access rights can be set differently for different languages by an administrator. If this is implemented, you can only edit and create content in languages to which you have access.

See also Languages add-on for information about extending the functionality in Episerver for translating content into multiple languages.

Switching language and viewing language versions

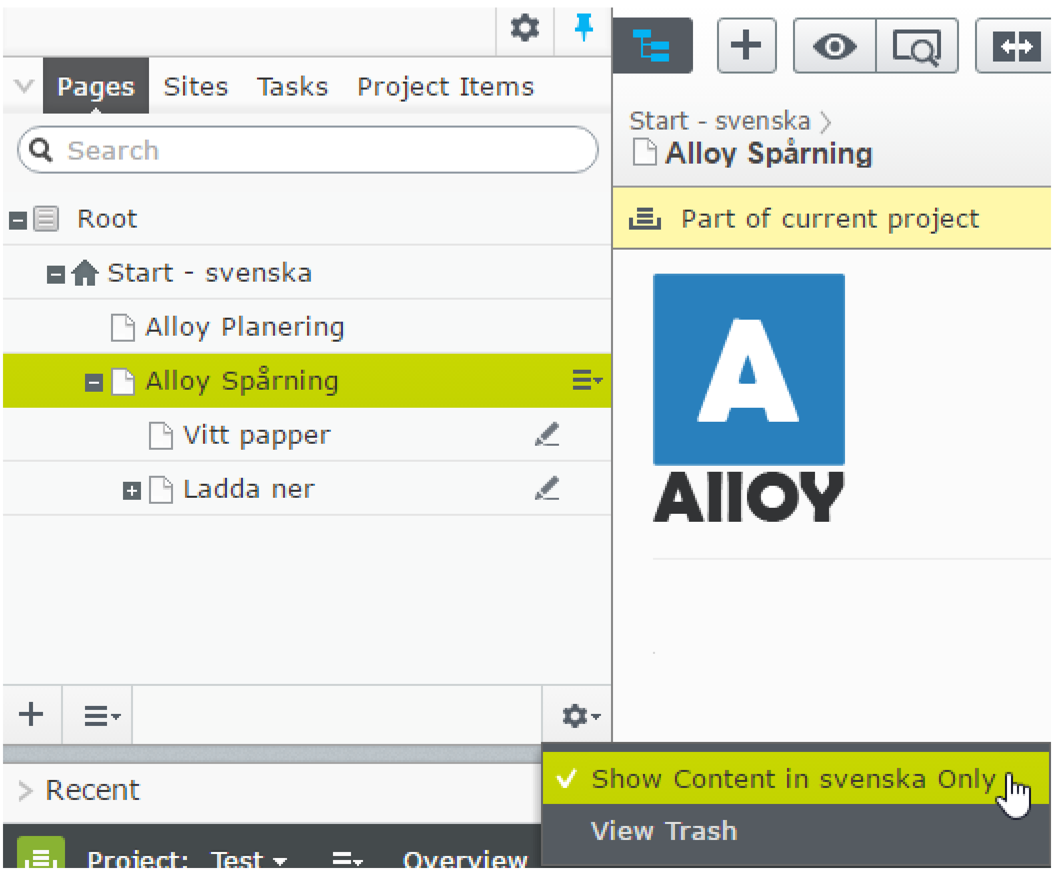
To switch language in **CMS**, go to the **Sites** tab in the navigation pane and select the desired language to work with. The user interface reloads, displaying the page tree in the selected language.

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



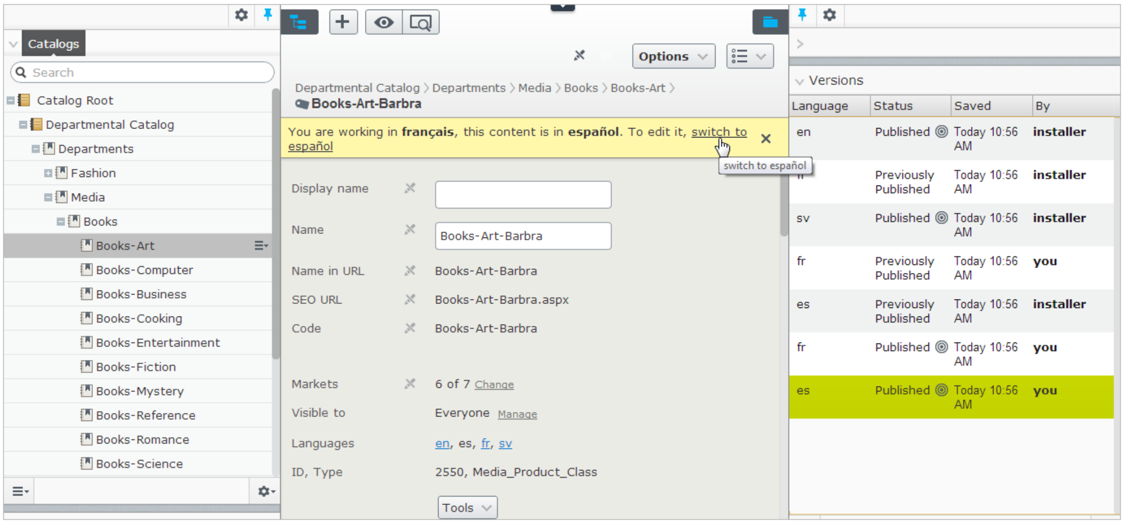
To view only pages that have been translated, select **Show Content in *[language]* Only** from the page tree's **Settings** button. This filters out all other language versions.

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



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

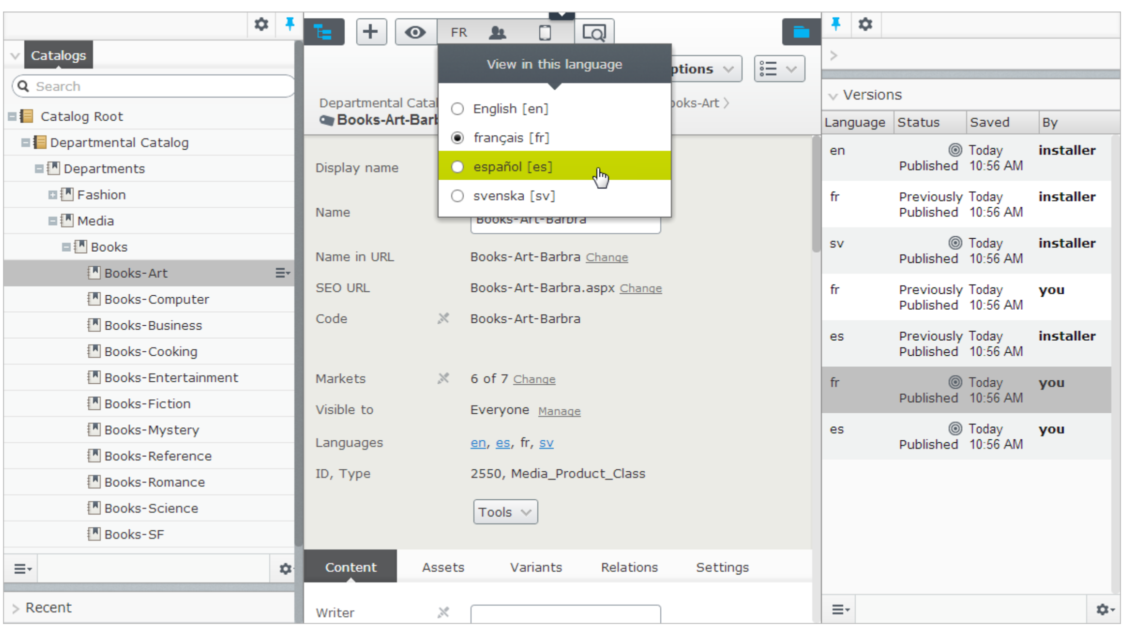
When you translate content, you can use the Versions gadget in the assets pane to see the different language versions for the content. By selecting a language in the version list, you also can switch to editing in another language using the switch option in the notification bar.



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

Previewing content in different languages

Using the view settings in the "eye" in the top menu, you can preview and edit content in one of the languages that are available for translation on the website.



Deleting language versions

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

Deleting one or more language versions cannot be undone.

Translating existing content

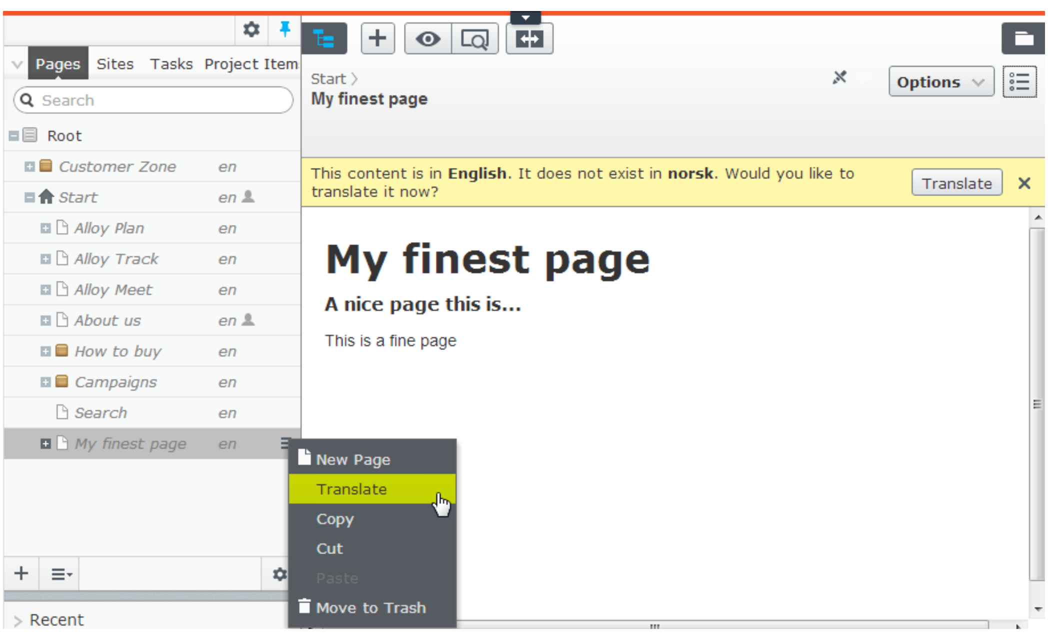
The **Sites** tab displays the languages available for content creation, with the default language for the website at the top. Languages that are enabled on the website but are not enabled for editing, are shown in italics.

Translating a page

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

Do the following to translate a page:

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



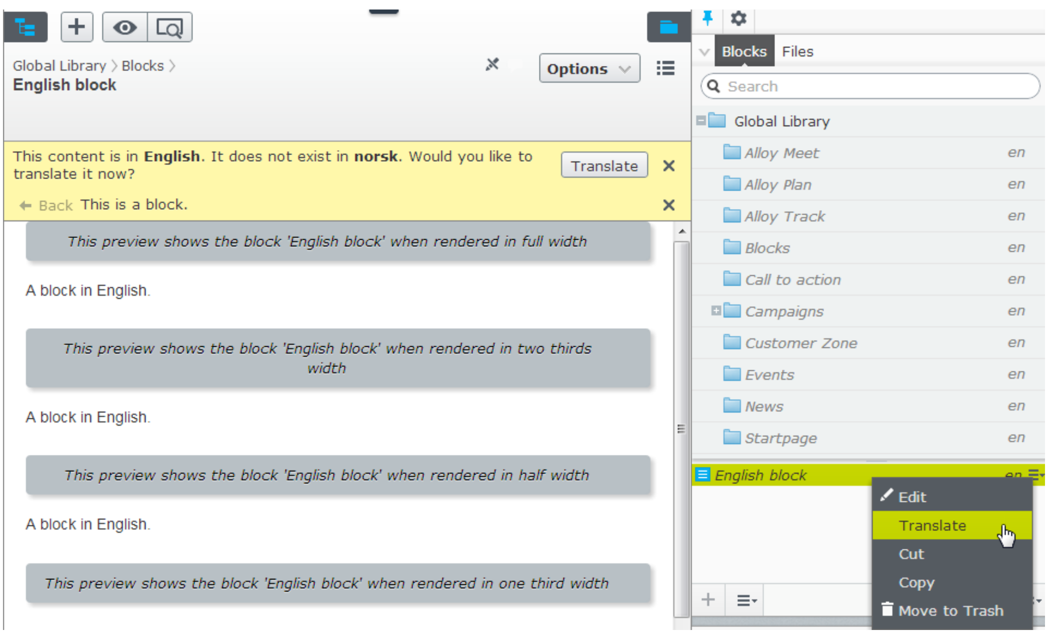
3. You can use the compare view to translate in one pane while seeing the original version in the other pane at the same time.
4. Edit the content and follow the content publishing flow to save and publish the translated page.

Translating a block

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

To translate a block:

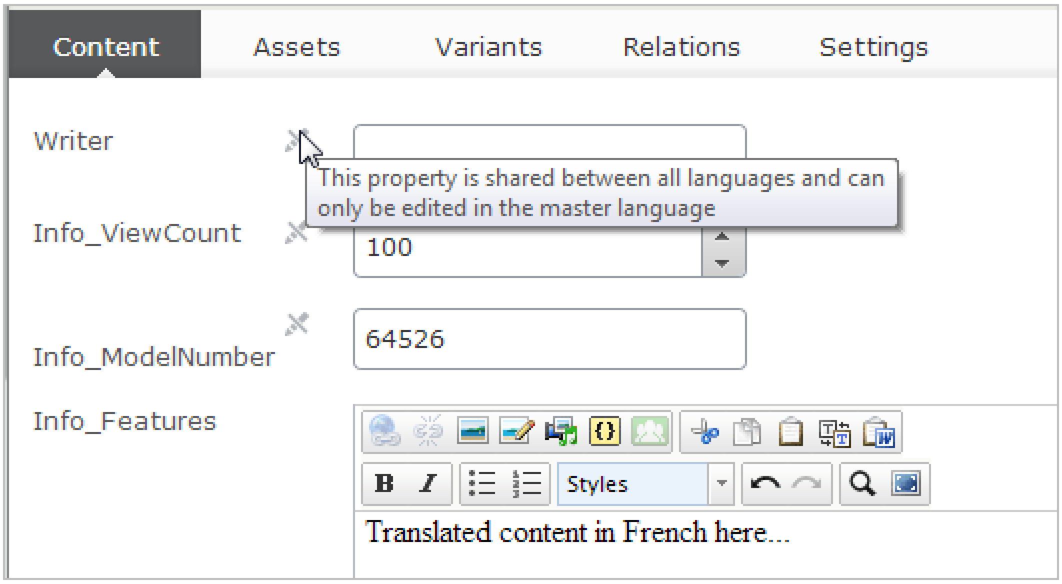
1. Under the **Sites** tab in the navigation pane, select the desired target language for translation, and the interface reloads.
2. Expand the assets pane and select **Blocks**.
3. In the block structure, select the desired block to translate, and then the **Translate** option in the context menu.



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

Global properties

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



Creating new content in another language

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

Commerce Commerce and multiple languages

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

CMS Fallback languages

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

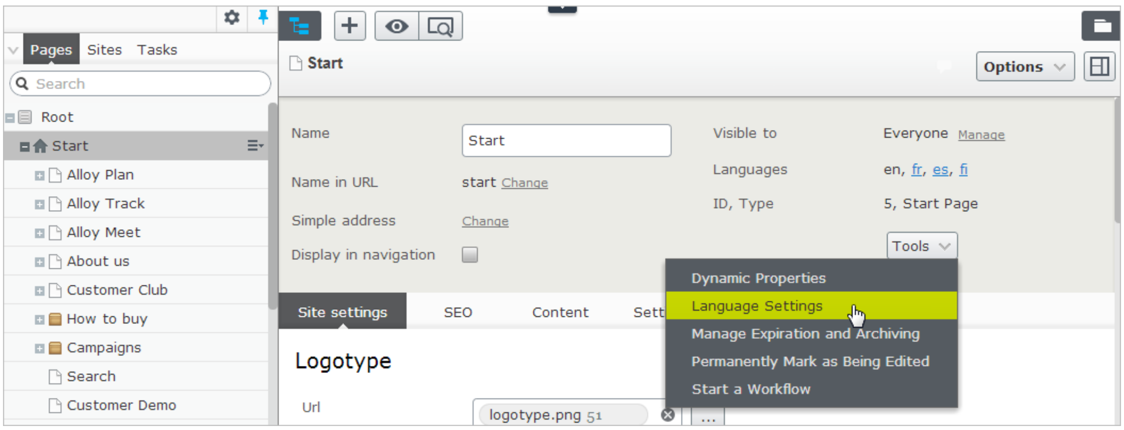
You have the following options:

- Unless a fallback or replacement language is defined, content is **invisible** to visitors browsing the website in a language into which content is not translated.
- Define a **fallback** language, in which the content is displayed until the content is available in the desired language.
- Define a **replacement** language, in which content is always displayed regardless of the language in which the content exists. If you define a replacement language for some content, a fallback language does not apply.

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

Setting fallback and replacement languages

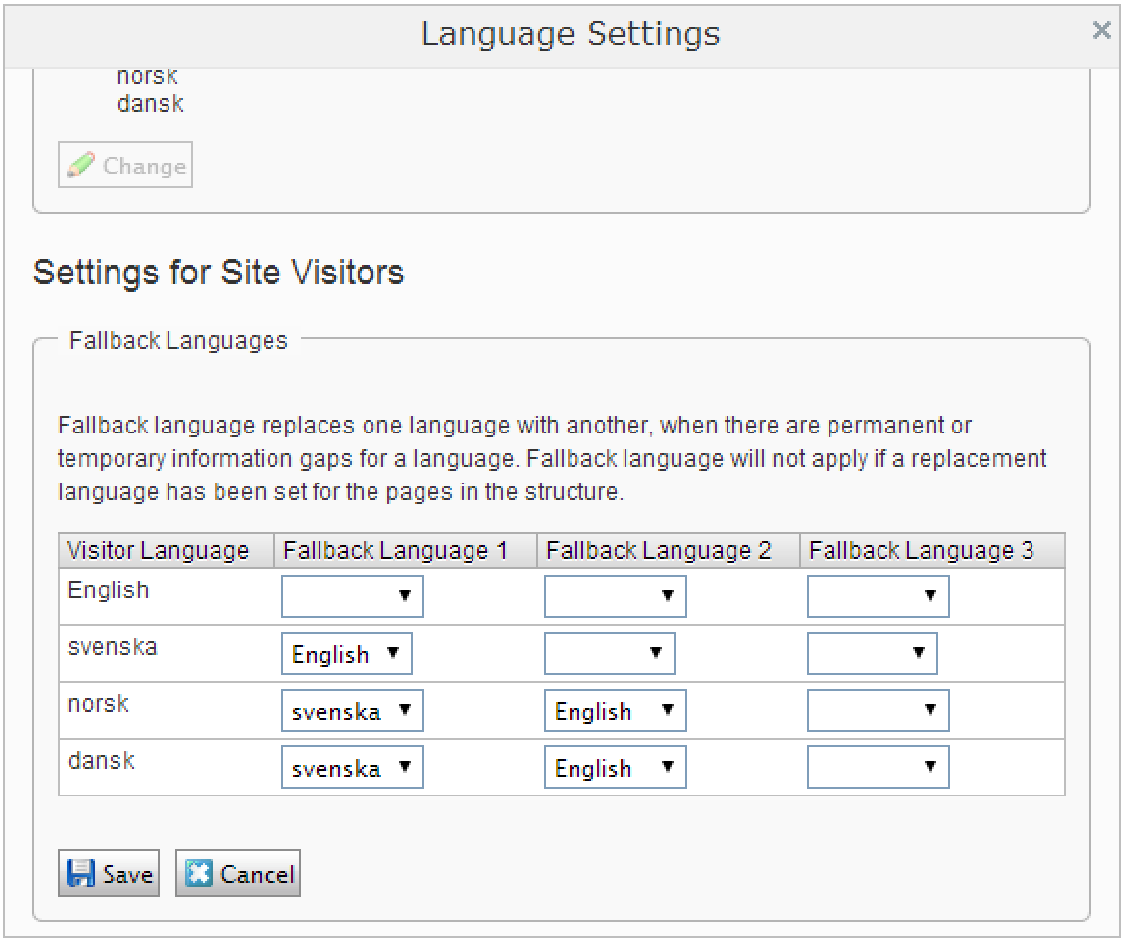
Fallback and replacement languages are defined from the **All Properties** edit view, when editing a page or a block and then selecting **Tools** and **Language Settings**.



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

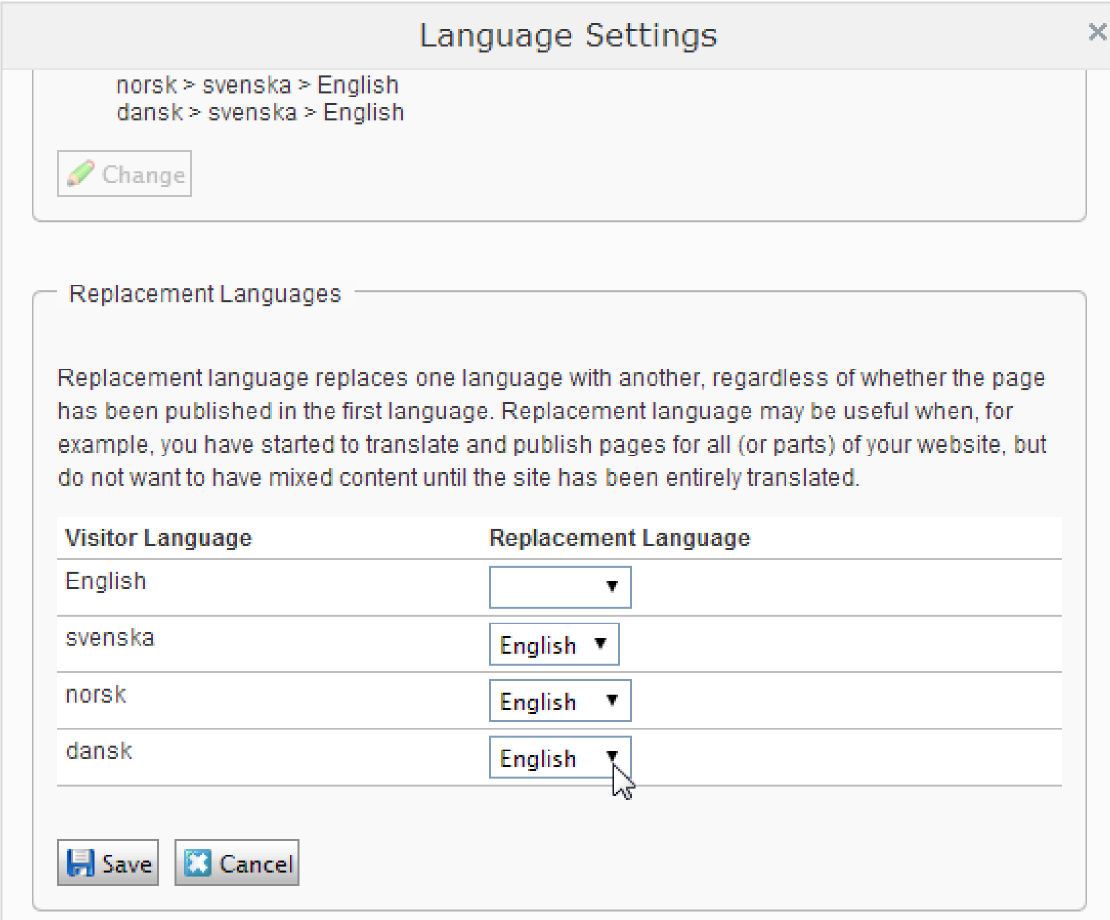
EXAMPLE: fallback language

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



EXAMPLE: replacement language

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



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

See also

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

CMS Personalizing content

Personalization in Episerver lets you target website content for selected visitor groups. For example, you can design a product banner, a landing page or a registration form specifically for first-time visitors, or for visitors from a geographic region or market.

The personalization feature is based on customized **visitor groups**, which you create using a set of **visitor group criteria**. Visitor groups must first be created to become available for selection when applying personalization.

There are numerous visitor group criteria available across the Episerver platform; see Administering visitor groups in the CMS Administrator User Guide.

Working with personalization

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

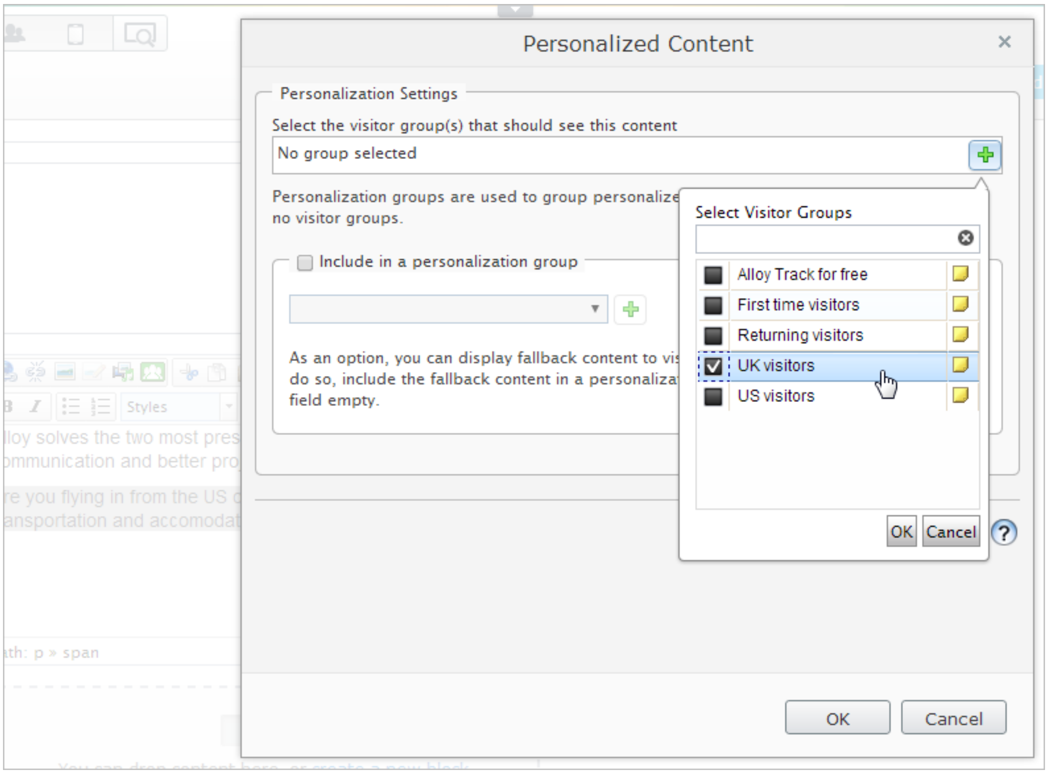
If you have multiple visitor groups, a visitor may match more than one visitor group. You then can use **personalization groups** to group content to avoid displaying the same content twice, and display **fallback content** to visitors who match no visitor groups.

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

Applying personalization

In the rich-text editor

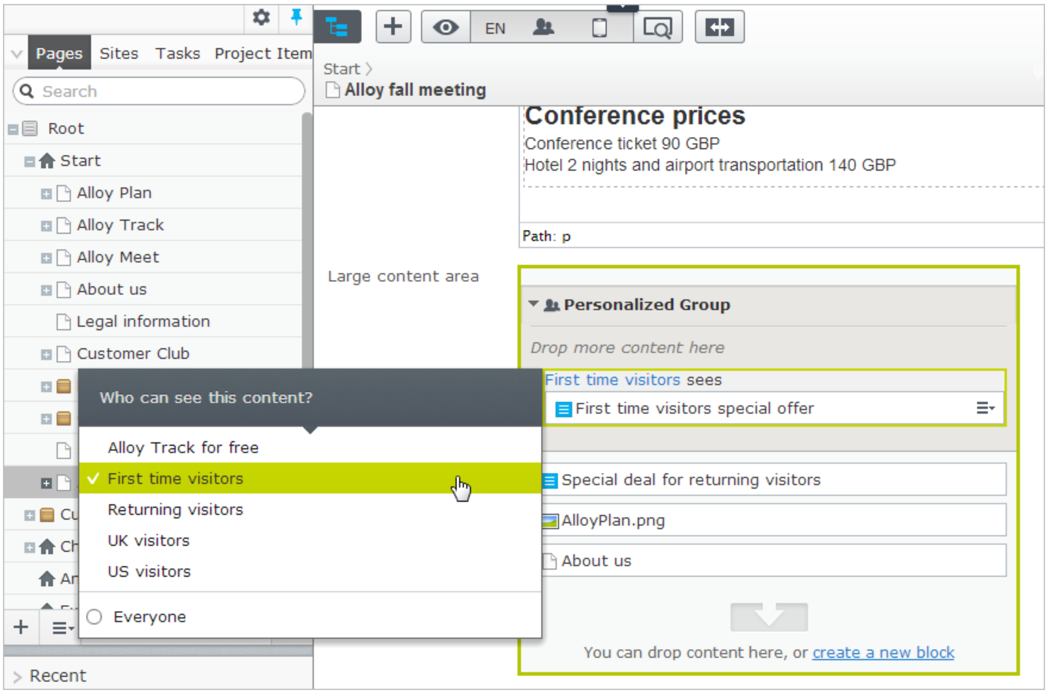
1. Open the page for editing, and select the content you want to personalize in the editor area.
2. Click **Personalized Content** in the editor toolbar.
3. Select one or more visitor groups from the list.



4. Preview the personalized content to verify the result.

In the content area

1. Open the page for editing, and select the content you want to personalize in the content area.
2. Select **Personalize** from the context menu.
3. Select one or more visitor groups from the list.



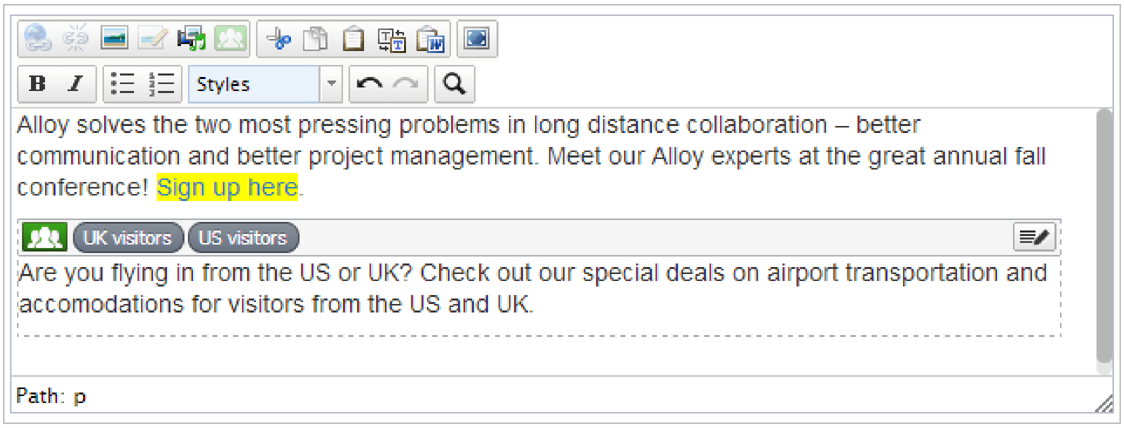
4. Preview the personalized content to verify the result.

Editing and removing personalization settings

- Rich-text editor.
  Click **edit** for the personalized content, and update the personalization settings, or select **Remove Personalization**.
- Content area.
  Expand the desired **Personalized Group** section and click the desired visitor group link to edit the settings. To exclude content from personalization, drag it outside the group, or select **Move Outside Group** in the context menu.

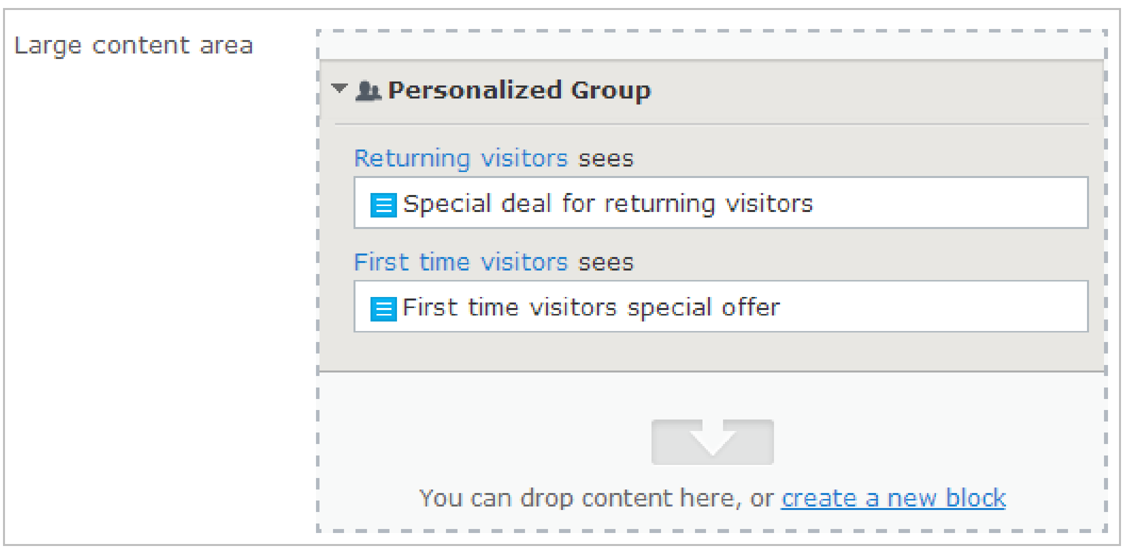
EXAMPLE: displaying content to multiple visitor groups without fallback

In the rich-text editor



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

In the content area



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

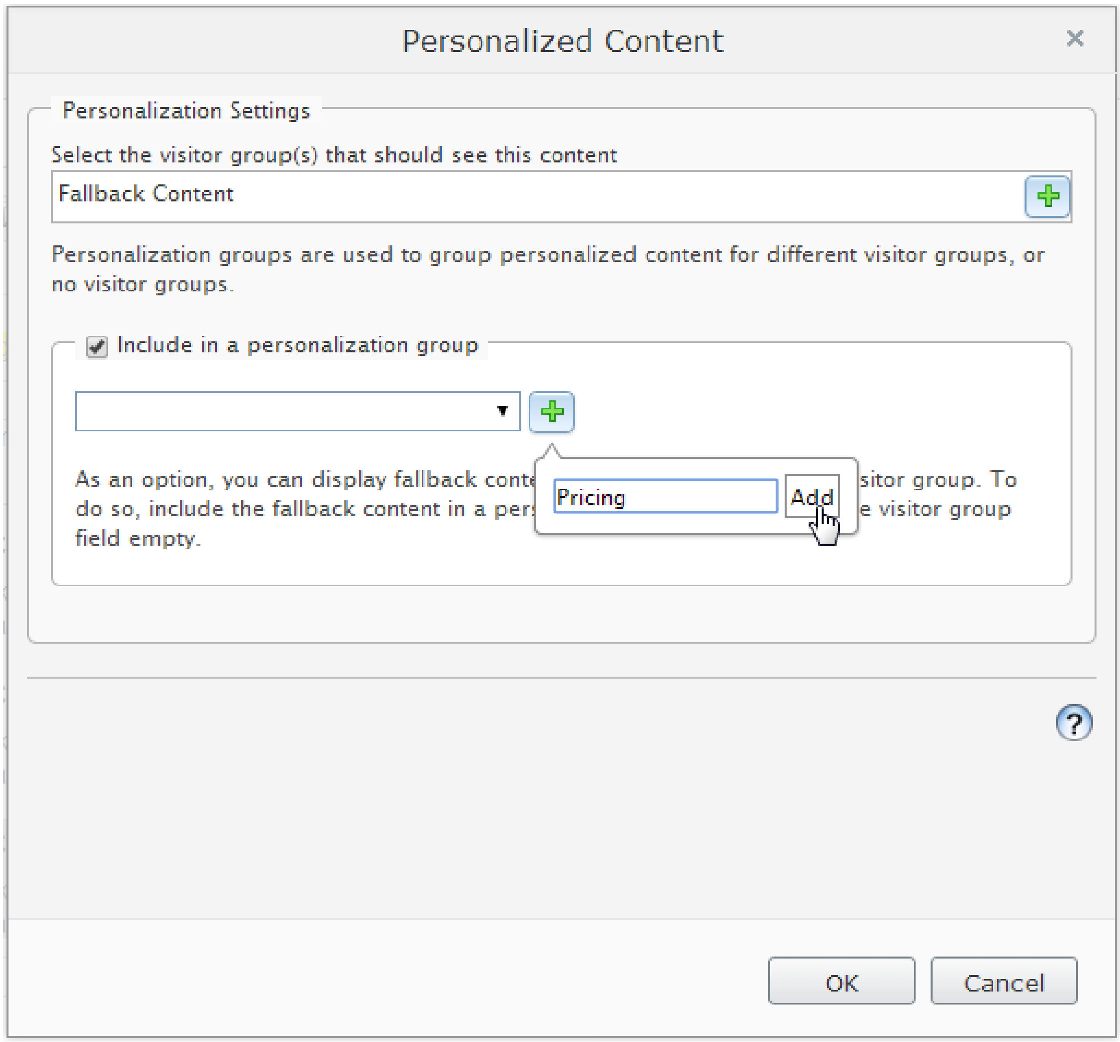
EXAMPLE: displaying content to multiple visitor groups with fallback

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

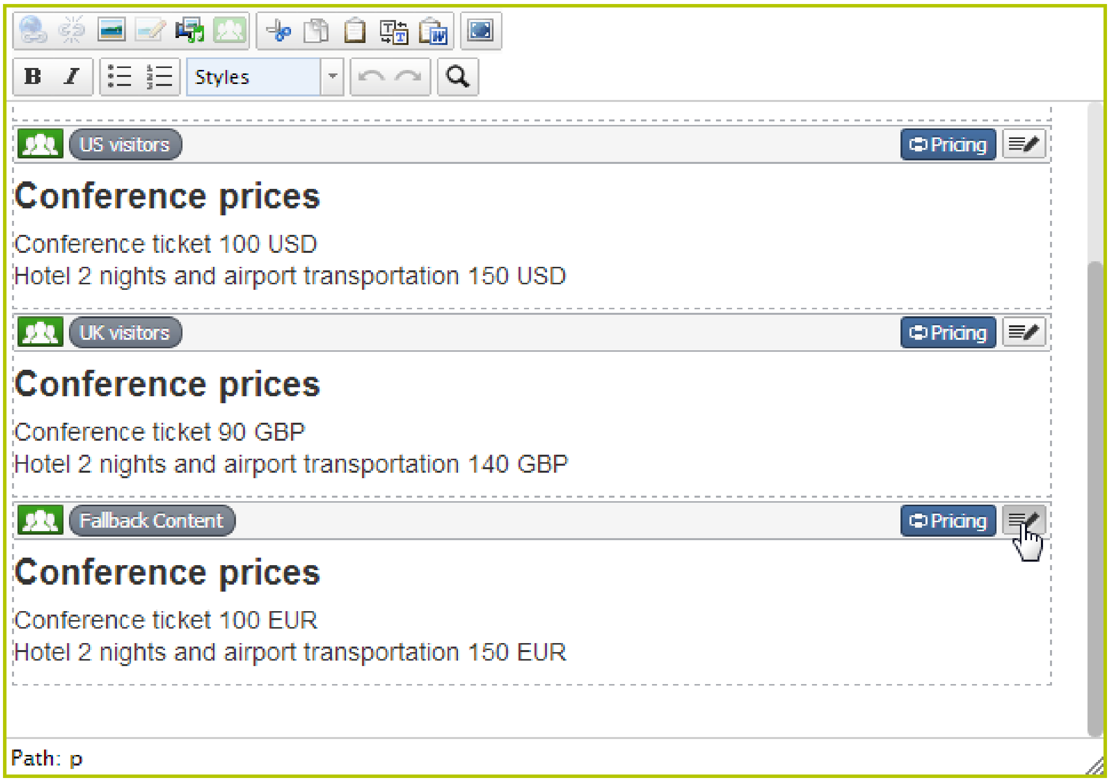
The order in which the personalized content is placed within a personalization group does not matter, but placing the fallback content at the end makes it easier to follow the personalization flow.

In the rich-text editor

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



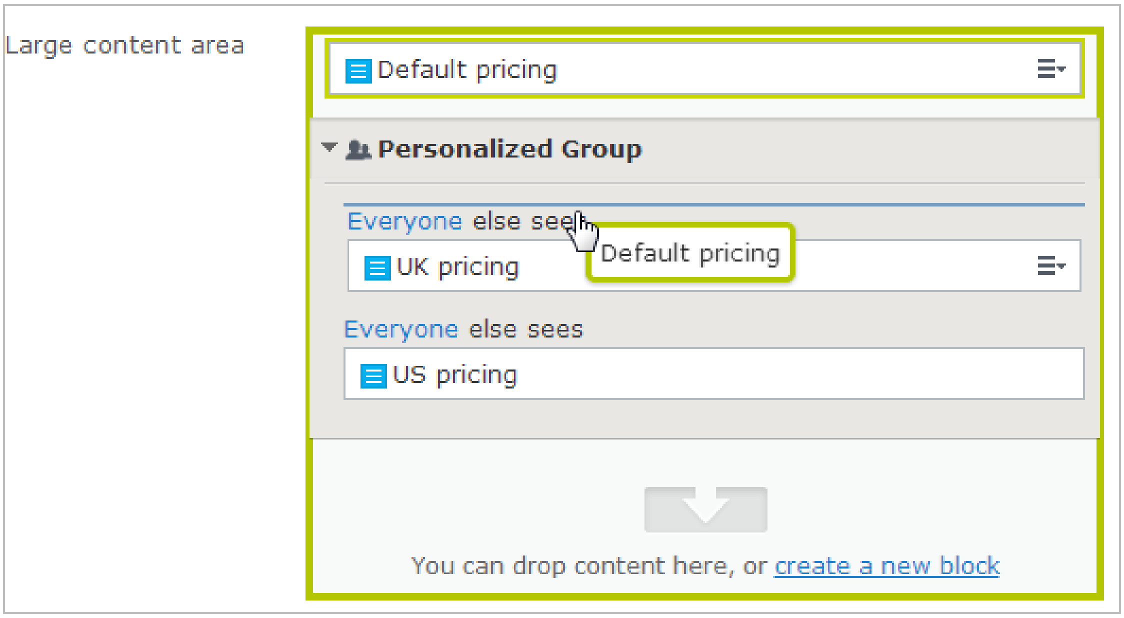
Personalize the price information texts for the UK and US visitor groups, and also **include them** in the **"Pricing" personalization group**. The personalization group is displayed to the right.



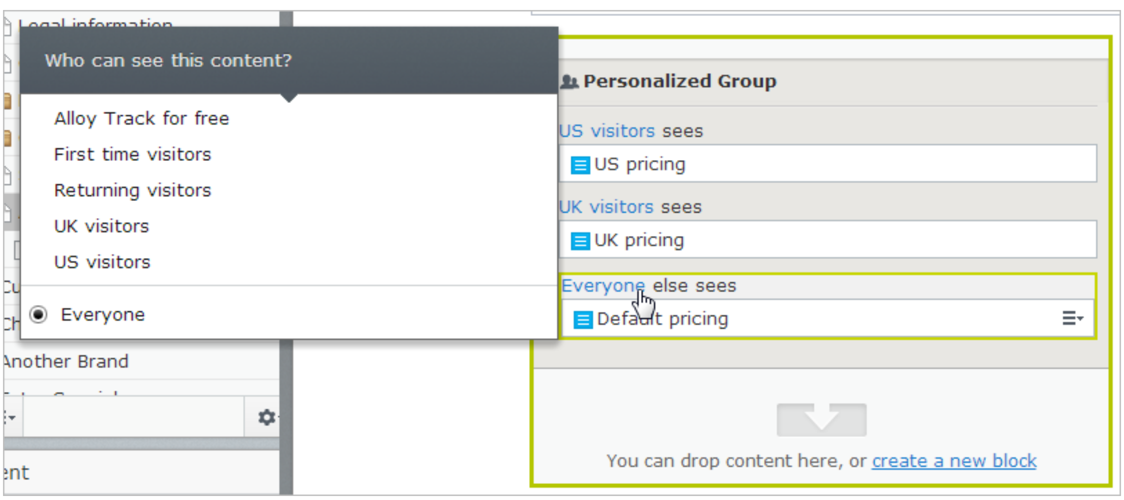
Now the personalization for this content is matched within the same personalization group.

In the content area

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



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



Providing access to content using visitor groups

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

Monitoring visitor group activities

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

Commerce Personalizing Commerce content

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

CMS Reports

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

Reports for CMS content

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

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

The following sample reports are available for Episerver CMS:

Report	Description
Not published pages	Displays unpublished pages that have a change date within a specified time span.
Published pages	Displays pages that have a publish date within a specified time span.

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

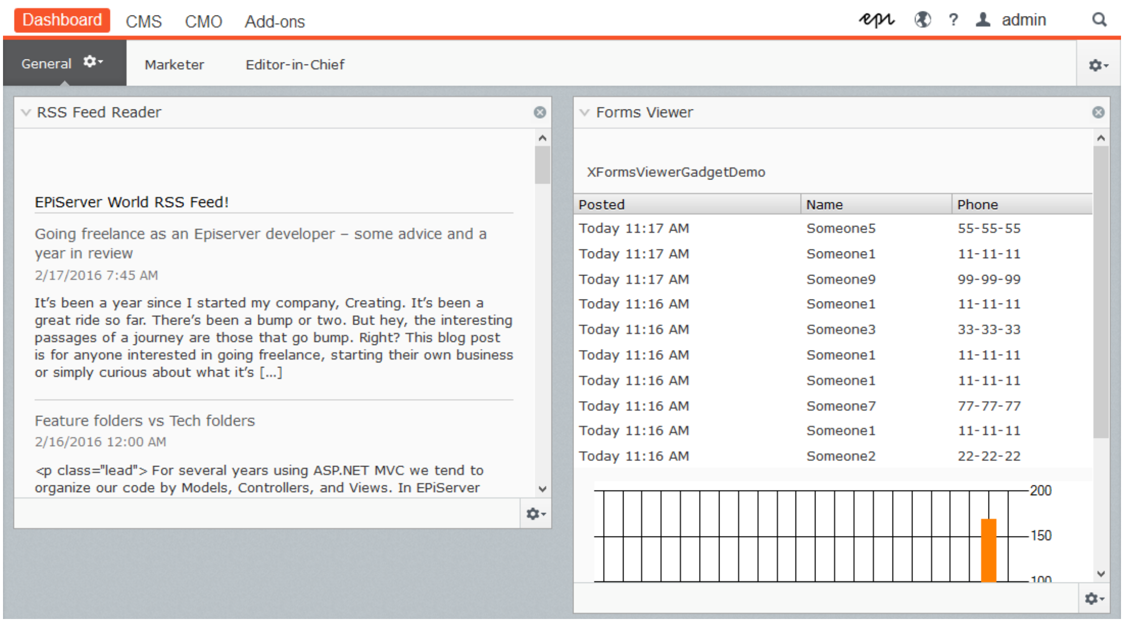
Some reports rely on scheduled jobs running in the background for generating report data; see Scheduled jobs in the CMS Administration User Guide.

Commerce Reports in Commerce

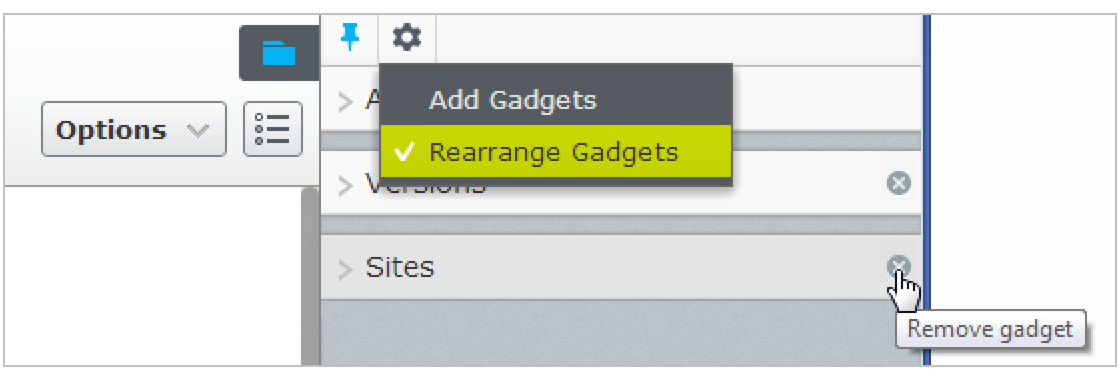
You can use reports in Episerver Commerce to follow-up on sales performance, or to monitor inventory stock information for products. See Reporting in the Commerce user guide, if you have a website with Commerce installed.

CMS Managing gadgets

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



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



Adding gadgets

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

Rearranging gadgets

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

Removing gadgets

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

Built-in gadgets

Gadgets for the dashboard

- **External links** provides an overview of the external links of your website.
- **Forms viewer** allows you to monitor the activity for a specific web form.
- **Notes** allows you to add colorful “post it” notes to your dashboard.
- **RSS feed reader** shows the latest feeds from an RSS source of your choice.
- **Visitor groups statistics** is used to monitor visitor groups viewing personalized content.

Refer to dashboard gadgets for more information on how to edit the configuration settings for dashboard gadgets.

Gadgets for the panes in edit view

- **Blocks** is used to access blocks (default in the assets pane).
- **Media** is used to access media files (default in the assets pane).
- **Forms** is used to access forms (default in the assets pane if the Episerver Forms add-on is installed).
- **Forms Elements** displays the forms elements that can be used when creating a form (default in the assets pane if the Episerver Forms add-on is installed).
- **Project Items** is used to view items belonging to a project. You can multi-select and mark items as **Ready to Publish** from this gadget.
- **Sites** displays the page tree for the website.
- **Recent** displays items you have viewed during your current browser session.
- **Tasks** displays tasks to be done on the website. This gadget lets you filter items on status. You can, for example, see a list of all items set as **Ready to Publish**.
- **Recently changed** displays recently changed content on the website.

- **Versions** is used to manage content versions. See also Publishing and managing versions for more information on working with versions.

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

Commerce Commerce-specific gadgets

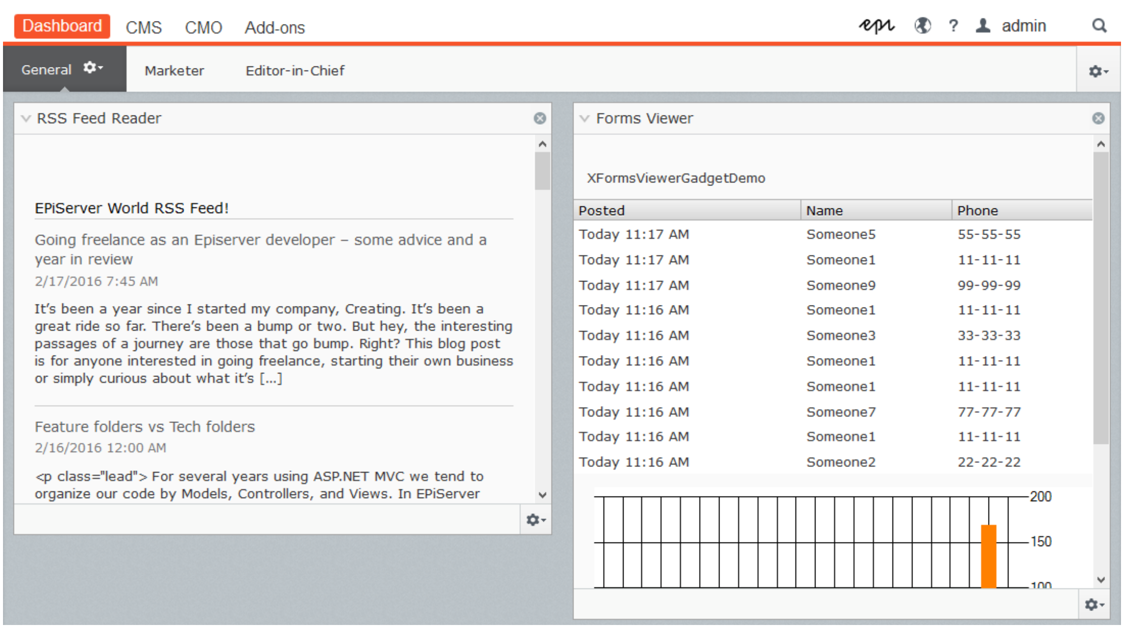
Episerver Commerce comes with a set of e-commerce-specific gadgets.

Addons Add-ons

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

CMS Managing dashboard tabs

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



Tabs

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

Creating tabs

Add a new tab on the dashboard as follows:

1. Select **New Tab** from the dashboard menu.
2. Select **Rename Tab** in the drop-down list for the tab you want to add and type a name for the tab.
3. In **Layout**, define how many columns the tab information area will have by clicking one of the available options.
4. Add the gadgets you want to the tab you have just created as described in Managing gadgets.

> You cannot change the order of tabs after they have been created.

Editing tabs

Edit a tab on the dashboard as follows:

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

Deleting tabs

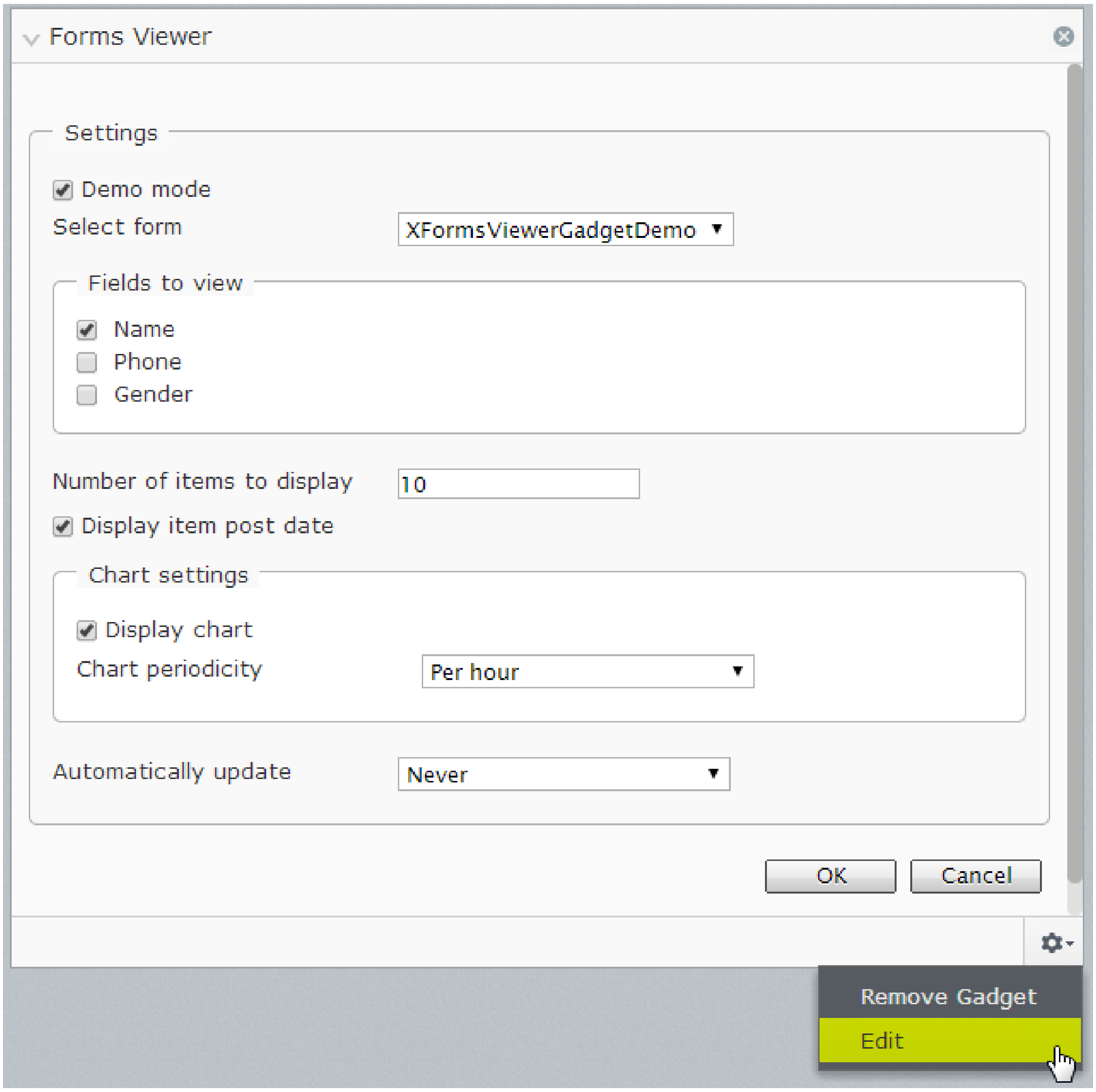
Delete a tab from the dashboard as follows:

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

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

CMS Dashboard gadgets

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



External links

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

Forms viewer

This gadget lets you monitor activity for a specific web-based form, for instance a poll, a registration or contact form. This is intended not only for editors, but anyone who has an interest in the activities of your website, for example, a marketing or business area manager. The gadget displays a selected number of the latest activities, such as the latest votes or registrations to a form. The result can also be displayed graphically.

- Select the desired form to monitor on the website.
- The gadgets retrieve the fields available in the form, and you can select the ones to include in the monitoring.
- Select whether you want to display the post dates, and enter chart settings as desired.
- Select the updating frequency for the information in the forms viewer.
- The “Demo mode” provides a graphical demonstration view based on a built-in example form viewer “XFormsViewerGadgetDemo”.

Notes

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

RSS feed reader

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

Visitor groups statistics

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

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

CMS Search

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

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

Built-in search features

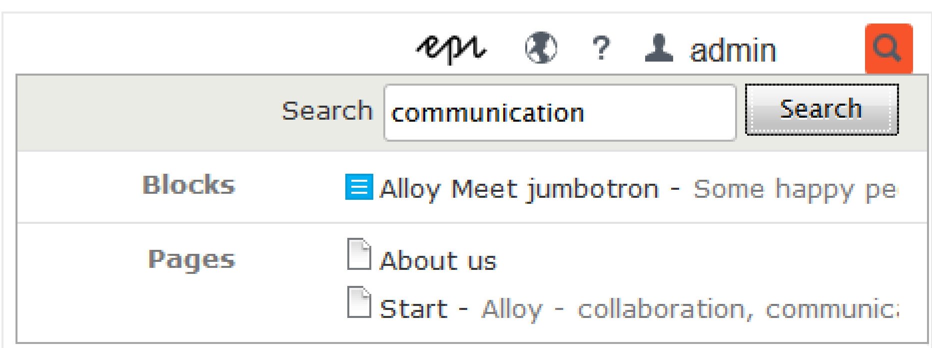
The following built-in search features are included in Episerver:

- Full-text search features.
- Indexing of any type of content, such as document files, pages and blocks.
- Event-driven indexing, meaning instant updating of index and search results.
- Search results filtered on access rights.
- “Search-as-you-type,” enhancing the search experience.

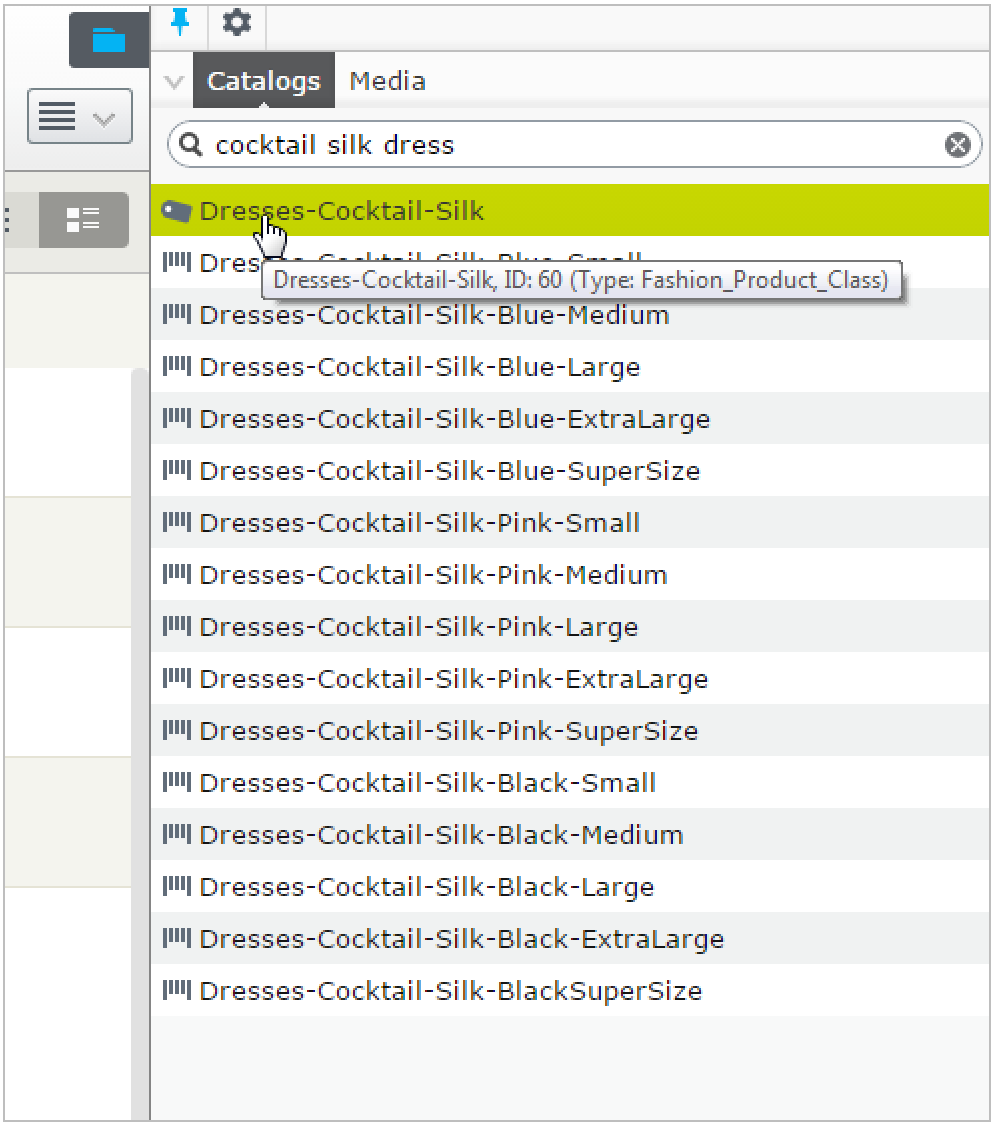
Search options

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

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



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



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

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

Search tips

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

Sorting search results

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

Configuring search

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

Addons Extended search with Episerver Find

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

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