Optimizely

Optimizely CMS

Administrator User Guide

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Optimizely CMS Administrator User Guide

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Table of contents

Introduction **10**
Features, licenses and releases 11
Images and screenshots 12
Notes 13
Copyright notice 13
Roles and tasks 14
Visitor and customer 14
Community member and moderator 14
Recipient 14
User 14
What's new? **17**
Release notes 2022 17
Archived documentation 23
Getting started **24**
Logging in 24
Accessing features 24
Navigation 24
Next steps 25
Administration interface **26**
Administration view 26
Visitor groups 27
More on administration 27
Administration in Optimizely Commerce 27
Administration in Optimizely Search & Navigation 27
Access rights **28**
Built-in user groups 31

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Setting access rights 32
Setting inheritance for content subitems 34
Setting access rights for all subitems 37
Removing a user or group from the access rights list 40
Using a visitor group in an access rights list 40
Access rights for languages 41
Access rights for the Optimizely platform 41
Managing users and user groups 41
Creating, editing and deleting users 42
Creating and deleting groups in CMS 44
Scheduled jobs 45
Administering scheduled jobs 45
Built-in scheduled jobs 47
Archive Function 47
Automatic Emptying of Trash 47
Change Log Auto Truncate 47
Clear Thumbnail Properties 48
Fetch data from Marketing Connectors 48
Link Validation 48
Monitored Tasks Auto Truncate 49
Notification Dispatcher 49
Notification Message Truncate 49
Publish Delayed Content Versions 49
Remove Abandoned BLOBs 50
Remove Permanent Editing 50
Remove Unrelated Content Assets 50
Subscription 50
Optimizely Commerce-related scheduled jobs 50
Optimizely Search & Navigation-related scheduled jobs 51
Other scheduled jobs 51
Exporting and importing data 52
Exporting data 52
To export content items 53

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Importing data ... 53
Change Log ... **56**
Managing websites ... **58**
Requirements ... 59
Creating and updating a website from admin view ... 59
Managing website languages ... **64**
Language overview ... 64
Adding and enabling languages ... 65
1. Adding and editing languages ... 66
2. Enabling a language on a website (if not already done) ... 67
3. Enabling a language for editing in CMS ... 68
Deleting an existing language ... 69
Managing approval sequences ... **70**
How it works ... 70
Content approvals on assets ... 71
Content approvals on multi-language sites ... 74
Setting up an approval sequence ... 74
Setting up an approval sequence (single language website) ... 74
Setting up an approval sequence for children items ... 76
Setting up an approval sequence on a multiple languages website ... 77
Editing an approval sequence ... 78
Approving and canceling approval sequences ... 79
Deleting an approval sequence ... 80
Commenting on content approvals ... 80
Four-eyes principle ... 80
Using notifications ... 81
User interface notifications ... 82
Email notifications ... 82
Creating categories ... **83**
Adding a category ... 83
Deleting or changing a category ... 85

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Editing tabs ... **86**
Tabs ... 86
Adding and editing a tab ... 87
Properties ... **93**
Property types ... 93
Editing and adding properties on content types ... 93
Editing a property ... 94
Adding a property ... 95
Defining language-specific properties ... 98
Setting a property to be language-specific ... 99
Placing a property on a tab ... 99
Configuring customized property settings ... 99
Priorities and configuration ... 99
Creating custom property types ... 100
Content types ... **102**
Content types and properties ... 102
Page types ... 103
Editing a page type ... 103
Creating a page type from admin view ... 105
Copying an existing page type ... 108
Block types ... 109
Other content types ... 109
Managing visitor groups ... **111**
Managing visitor groups ... 116
Creating a visitor group ... 117
Editing a visitor group ... 118
Copying a visitor group ... 120
Deleting a visitor group ... 120
Using a visitor group to personalize content ... 121
Examples of creating visitor groups ... 121
Site criteria and points ... 121
Geographic location ... 123
Geographic coordinate ... 123

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Referrer 123
Form and form values 124
Additional visitor group criteria 125
Optimizely Commerce criteria 125
Optimizely Marketing Automation 125
Index **127**

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Introduction

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

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

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

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

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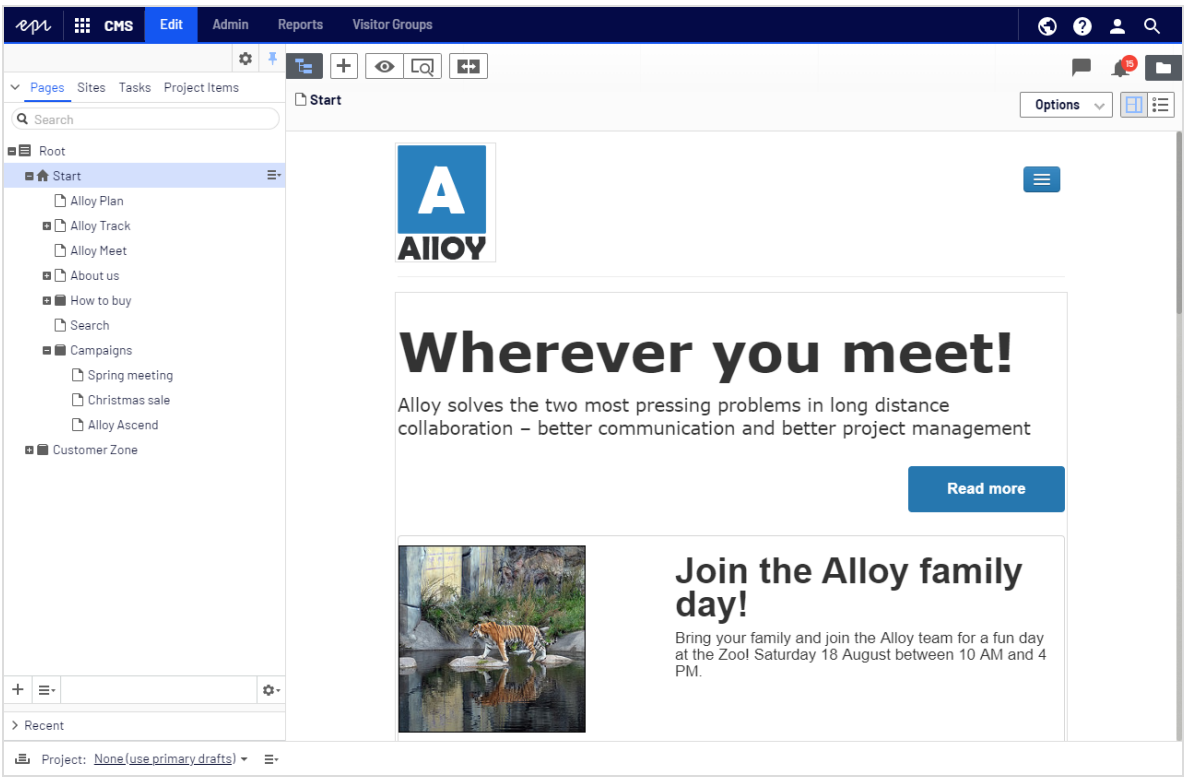

Features, licenses and releases

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

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

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

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

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

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

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

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

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

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

Images and screenshots

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

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Notes

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

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

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

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

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Roles and tasks

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

Visitor and customer

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

Community member and moderator

A *community member* or a visitor can add content, if social features and community functionality are available for the website. This content includes forum and blog postings, reviews, ratings and comments, in which case an editor, or a specific *moderator* role for large websites and online communities may need to monitor this type of content on the website.

Recipient

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

User

A *user* is someone who logs in to the Optimizely user interface to work with different parts of the platform. A user can belong to one or more user groups and have different roles,

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depending on which parts of the Optimizely platform they use, their tasks, and the size and setup of the organization.

Website owner

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

Content editor

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

Marketer

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

Merchandiser

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

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Customer Service Representative

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

Administrator

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

Developer

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

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What's new?

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

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

This release of the Optimizely User Guide describes features available in Optimizely as of 2022-03-14. See release notes (below) for update history. See Archived documentation in the online version of the user guide for previously released user guides and for older release notes.

Release notes 2022

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

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Released	Area	Features and updates
		to restrict access to the user account. See Managing users. (update 379)
2021-09-28	CMS	The Reports view is no longer supported and is removed. (update 378)
2021-09-28	CMS	The admin view is redesigned. (update 378)
2021-09-28	CMS	Visitor groups user interface is redesigned. Criteria previously included in the add-on **Visitor Group Criteria Pack** are now included in Optimizely CMS by default, see Built-in visitor group criteria. (update 378)
2021-09-28	CMS	The dashboard is no longer supported and is removed. Gadgets are now only installed in the navigation or assets panes. (update 378)
2021-09-28	Commerce	The Commerce Manager administration system is removed, and replaced with a new Administration view, from where you can define markets and warehouses, index catalogs, configure taxes, shipping, and payments, and work with dictionary properties. (update 378)
2021-09-28	Commerce	A new Customers view replaces the legacy Customer Management in Commerce Manager. (update 378)
2021-09-28	Commerce	Some functionality, previously managed from Commerce Manager, is now managed through code: • Dictionaries. Adding currencies, countries, and return reasons. • Dictionaries. Adding values for organizations and contacts.

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Released	Area	Features and updates
		• Catalog batch updates and catalog import/export. • Management of business objects, and catalog and meta-classes fields. See Optimizely World for technical details, and previous versions of the user guide for the removed legacy functionality. (update 378)
2021-09-23	Campaign	Mailings Classic and Reports will be deactivated on 2022-03-01. To migrate your mailings to Smart Campaigns, see Mailings Classic. To migrate your reports to the Performance Dashboard and Deep Analytics, see Reports. (update 377) The current Apple operating system versions include the Apple Mail Privacy Protection, which restricts the transmission of tracking information to Optimizely Campaign. See Apple Mail Privacy Protection.
2021-09-09	Campaign	You can now merge mailing content from different campaigns into a new campaign. See Merge content. (update 377)
2021-09-02	Campaign	When importing recipients, you can now merge the contents of recipient list fields of type "String" and "Text". You can either append or prepend the content or replace the old content with the new one. (update 376)
2021-08-12	Marketing automation connectors	The configuration settings screen of the Microsoft Dynamics CRM connector was updated.
2021-08-02	Campaign	The redesigned user interface has been released. Optimizely Campaign screenshots in

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Released	Area	Features and updates
		the user guide have been updated. See Start page.
2021-07-22	Marketing automation connectors	The Pardot connector has a breaking change when you upgrade to version 6. The configuration screen has new fields to create new connectors. Configurations made with older versions of the Pardot connector will no longer work.
2021-07-20	Campaign	You can now create webhooks for the *unsubscribe* event. (update 373)
2021-07-13	Email Product Recommendations	New strategy: Recommendations from categories of purchased products (last 365 days)
2021-06-24	Campaign	If you use the coupon system, you can now optionally create QR codes. You can also use field functions to generate QR codes that refer to specific recipient list fields. (update 371)
2021-06-17	Campaign	See Deliverability basics for information about the BIMI email authentication standard.
2021-06-14	B2B Commerce	Spire roles documented.
2021-06-09	B2B Commerce	Adyen payment gateway plug-in documented.
2021-05-27	Marketing automation connectors	Fields were added to the Acoustic (Silverpop) Connector setting screen to include database lists. (update 368)
2021-05-13	Campaign	In Deep Analytics, you can use separate groupings for the name and ID of mailings, recipient lists, and clients. See Groupings. (update 366)
2021-04-29	Triggered Messages	A new feature was added to the Targeted Discount daily trigger to enable the trigger to fire

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Released	Area	Features and updates
		if products were added to a basket but not purchased within the last 30 days.
2021-04-22	Campaign	You can now create webhooks for the *bounce* event. (update 364) See Deliverability basics for information about list bombing and learn how to recognize these cyberattacks and protect yourself.
2021-04-15	Campaign	See Deliverability basics for a glossary of the most important terms related to deliverability.
2021-03-31	Campaign	The beta phase of the webhook feature has been expired. You can now create webhooks for the *sent* event and optionally submit the Basic HTTP Authentication header. You can also verify and update webhooks via REST API. See Webhooks. (update 362) You can now display background images in grouping paragraphs and sidebars in the mobile newsletter version. You can also automatically stretch or crop the image to fill the entire paragraph area. See Grouping paragraph. (update 362) The beta phase of the A/B tests for transactional mails feature has been expired. This feature is now available for all users on request.
2021-03-25	Visitor Intelligence	Visitor Intelligence now comes with a set of built-in filter definitions. It is also possible to add time and occurrence filters to segments to further limit matching profiles. See Creating a segment based on filter definition. (update 360)
2021-03-25	Campaign	In the Optimizely Campaign start menu under

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

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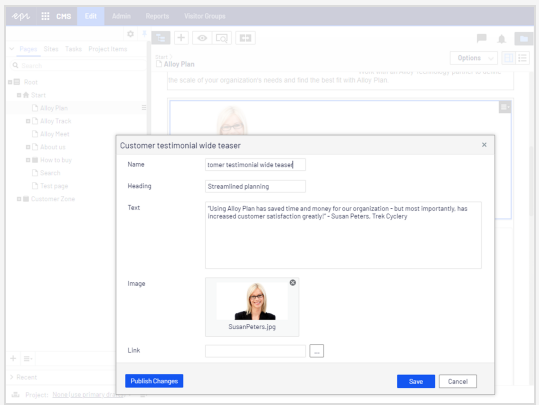
Released	Area	Features and updates
		
2021-01-21	Commerce	Customer service representatives can create *notes* associated with carts, orders, and subscriptions (update 349).
2021-01-21	Personalization	• Create reusable email templates • Export CSV data in localized format for the selected language • Users (with authorization) can change the currency selection
2021-01-21	Campaign	You can now run A/B tests for transactional mails to send different variants of a transactional mail and check which variant performs better.

Archived documentation

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

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Getting started

This topic describes how to log in to an Optimizely website, access features and navigate the different views. The login procedure may be different from what is described here, depending on how your website and infrastructure are set up.

Logging in

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

Accessing features

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

Selecting **CMS Edit** takes you to the edit view and other parts of the system.

Navigation

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

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Next steps

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

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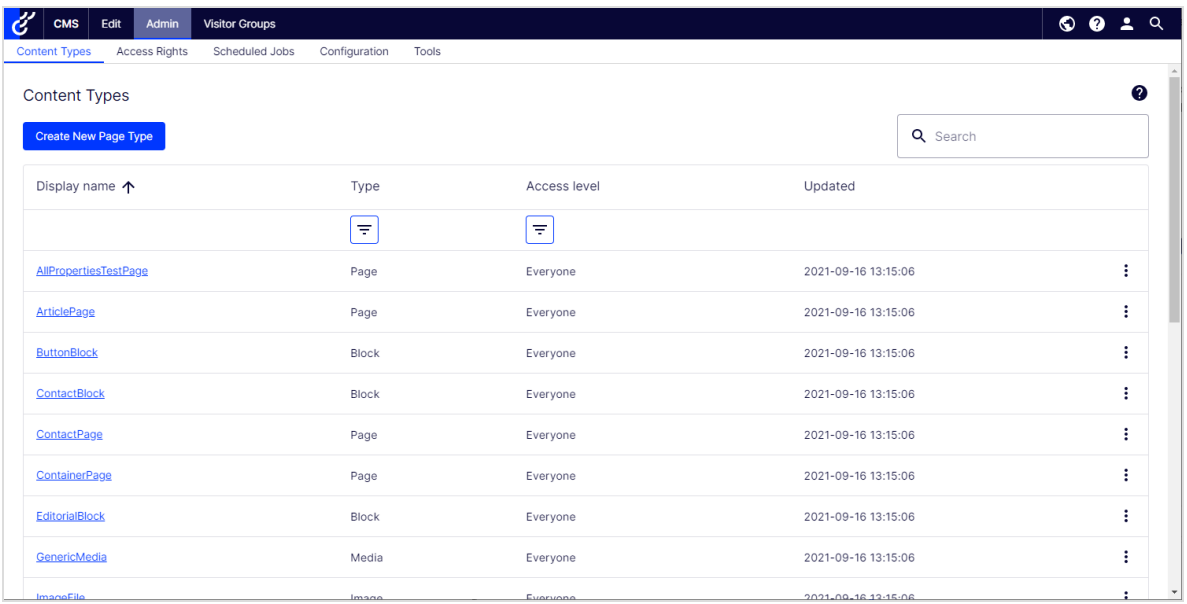
Administration interface

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

Administration view



The **Admin** view in CMS contains core administration features for the Optimizely platform where you manage:

- access rights
- languages for the website
- scheduled jobs
- export and import of data between websites
- configuration of new websites in a multi-site solution

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Visitor groups

Visitor groups are used by the personalization feature, and are managed from the **Visitor Groups** option in the top menu. You need administration access rights to manage visitor groups.

More on administration

Administration in Optimizely Commerce

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

Administration in Optimizely Search & Navigation

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

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Access rights

By using access rights in Optimizely CMS, you can control the content that a website visitor sees, and what editors can do and where they can do it in the content structure. For example, you may give members of the marketing department access to edit the website marketing material that other company users should not edit. You can set access rights for different types of content, such as pages, blocks, images and documents in the navigation and assets panes.

You can also use access rights together with visitor groups and give a visitor group from a local 10-mile radius access to an advertisement page.

Access rights are normally managed from the administration view in Optimizely CMS, but you can give editors the right to manage access rights for a single page in edit view.

Video tutorial: Managing access rights (6:39 minutes)

Different types of access

You can grant or deny the following types of access to users and groups: Read, Create, Change, Delete, Publish, and Administer.

Access right	Description
Read	The user or group can access the content as a reader; otherwise the content is invisible.
Create	The user or group can create content under the content item on which this right is set.
Change	The user or group can access the content to modify it. Typically, Create and Change are set together but there may be cases where you want someone to modify created content (but not create their own content), or vice versa.
Delete	The user or group can delete the content.

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

Access rights to assets

Just as for pages, access rights can be applied to assets, such as folders, blocks and media, in the content structure. You can define specific access rights from the "Root" level and all the way down, including the **Recycle bin** (Trash) and **For All Sites** that stores blocks and media. Blocks and media share the same folder structure.

Editors must have **Create** access rights to the global or site-specific folder under **For All Sites**/**For This Site** where they want to upload an image or create a block, or to the current page when adding assets to the local **For This Page** folder. If media should be automatically published when they are uploaded, editors who upload must have **Publish** access rights, either to the global or site-specific folder or to the page, if media are uploaded to the local folder.

See Folders in the CMS Editor User Guide for a description of global, site-specific, and local folders.

> **Note:** Media are never automatically published if an approval sequence has been set on the folder to which the media are uploaded.

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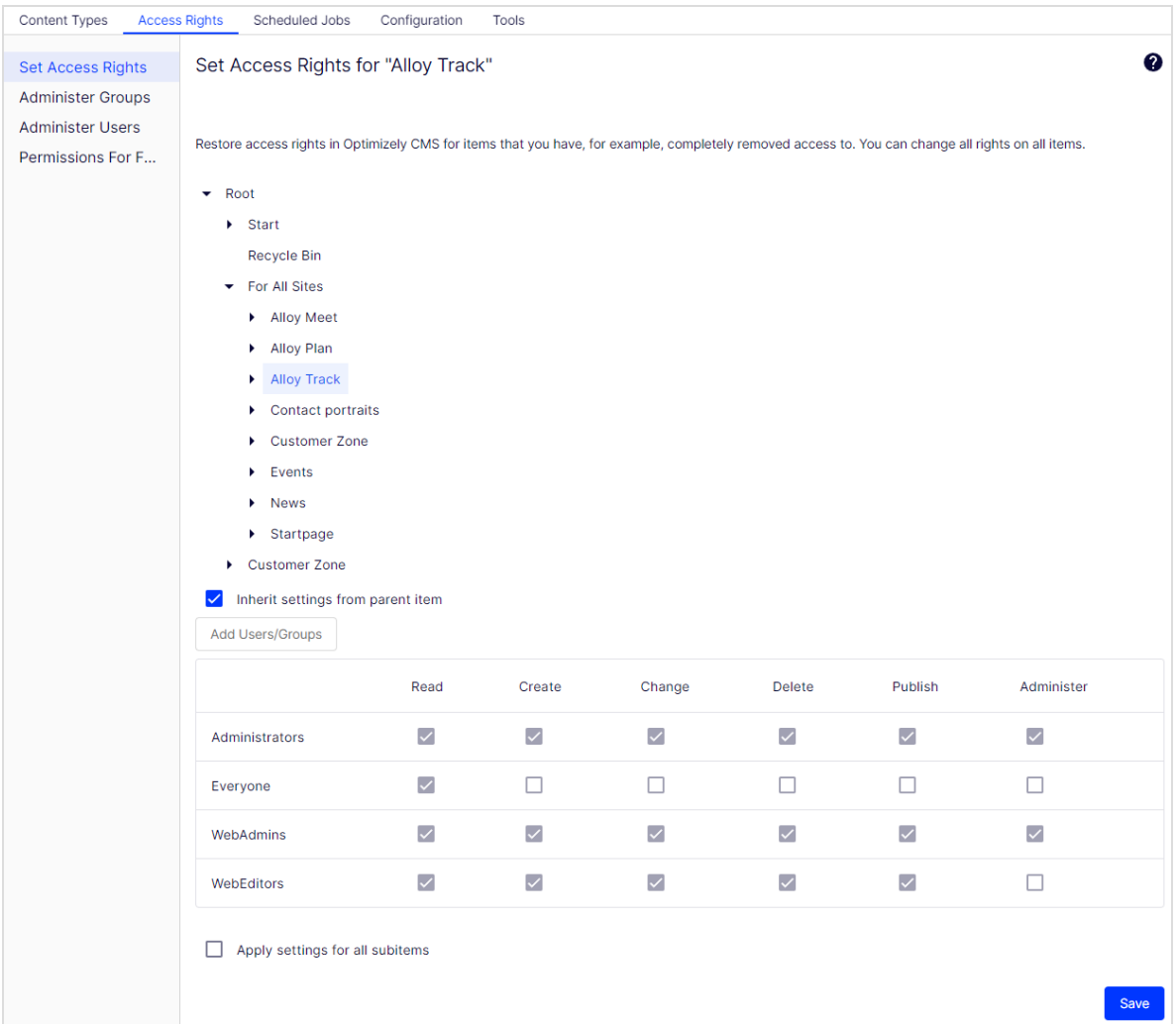

Should I set access rights for a single user or for a group?

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

If you have a number of users that need common access to content, managing access rights on a user-by-user basis can be complex. Create user groups that have similar access needs, add the users to each user group, and then use the user group to set access rights to content. This lets you manage access rights more easily. You can add a user to one or more groups.

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

Built-in user groups

By default, Optimizely CMS has built-in user groups that align with user roles. You can extend predefined groups and roles; see **Managing users and user groups**.

> **Note:** When your website is set up during development, the membership and role providers available for your website need to be configured to use the built-in groups and roles in Optimizely.

Group	Description
Administrators	Comes from Windows and is defined when the website is created. An administrator can access all parts of the system, and can edit all website content. Often, administrators are developers setting up or maintaining the website.
WebAdmins	Comes with Optimizely and can access both admin and edit views and the administration interfaces for add-ons and visitor groups. To use this group, you must add it through admin view > **Admin** tab > **Access Rights** > **Administer Groups** > **Add** > **WebAdmins**. > **Note:** Membership in **WebAdmins** does **not** provide editing access in the content structure by default. In most cases, only a few system administrators or "super users" belong to this group.
WebEditors	Comes with Optimizely and can access the editing view. To use this group, you must add it through admin view > **Admin** tab > **Access Rights** > **Administer Groups** > **Add** > **WebEditors**. Add users to this group who need access to the edit view. Then add the

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Group	Description
	users to other groups to give them specific edit rights to content. On large websites, editors are often organized in groups according to content structure or languages.
Everyone	Comes from Windows and provides "anonymous" visitors with read access to website content. All unregistered visitors to a public website are anonymous, meaning that they cannot be identified by the system. Removing access rights for the **Everyone** group, requires login to access content even if it is published.

Setting access rights

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

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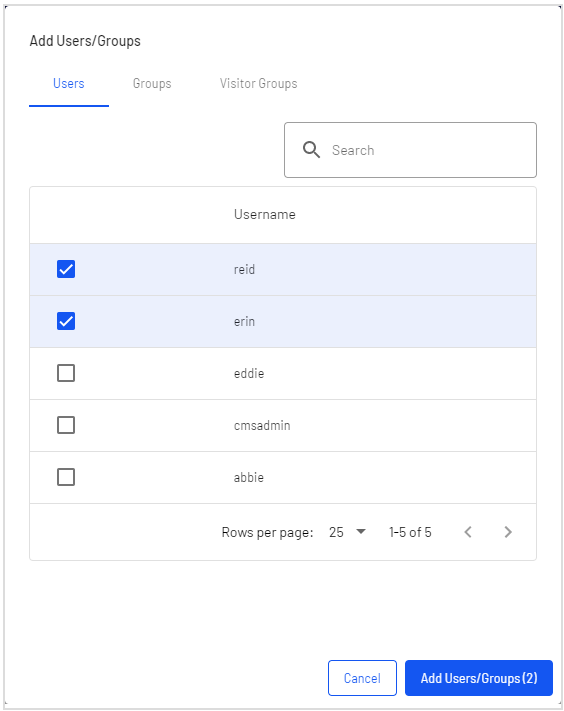
5. Enter a name or email address in the search field to find a specific user or group.



6. Select the check box of a user or group to add it and click **Add Users/Groups**.
7. Modify the access rights settings as you want them and click **Save**. The users or groups appear in the Set Access Rights view for the selected content tree item.

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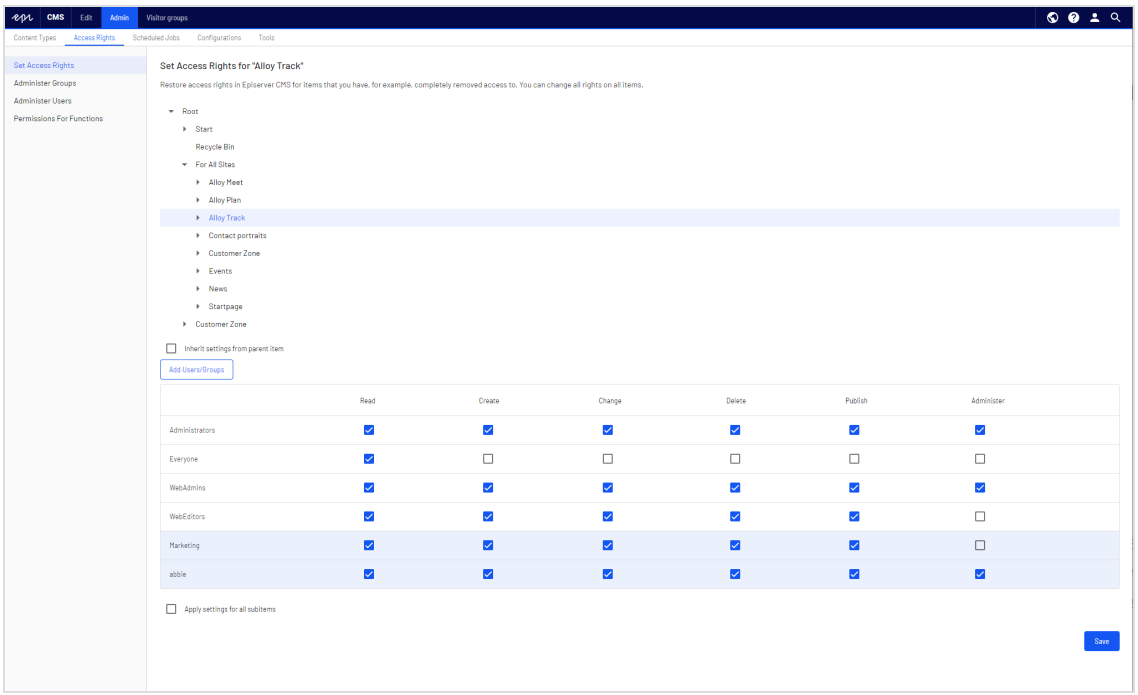

> **Note:** If you set conflicting access rights to content, selected access rights prevail over cleared access rights. For example, Abbie is a member of both the *Marketing* and *Support* user groups which each have different access rights set on the same content; *Marketing* has **Publish** rights,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

Setting inheritance for content subitems

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

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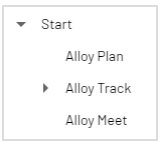
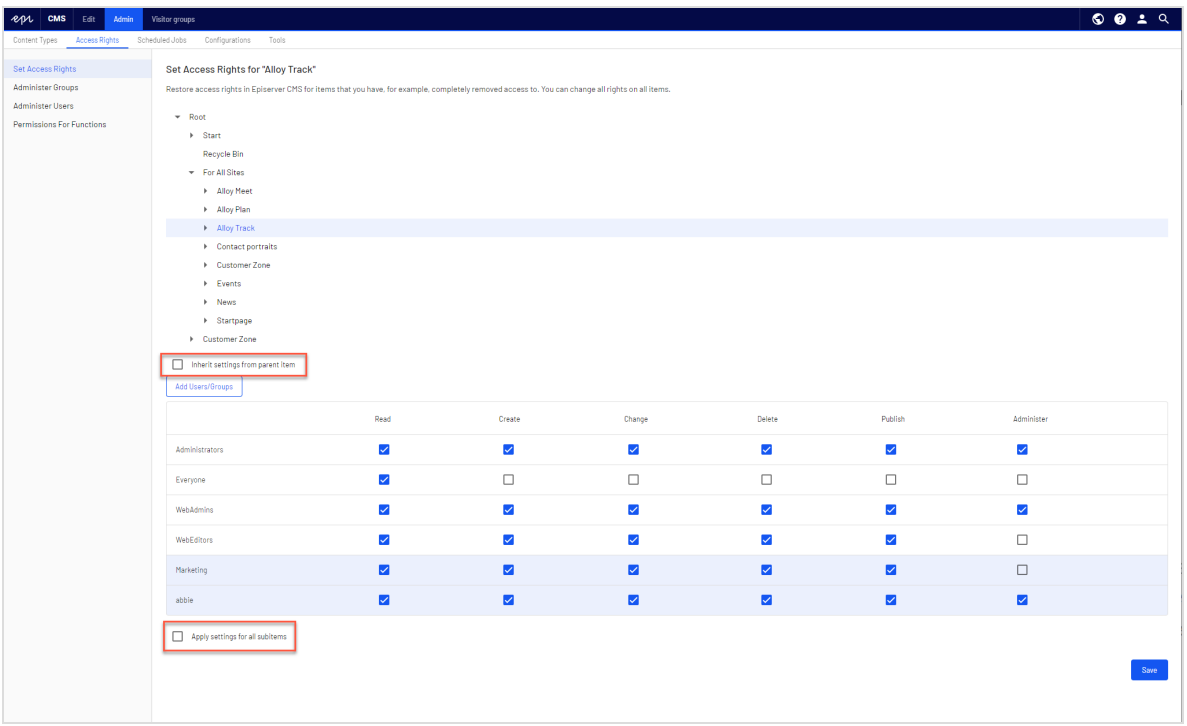


- If you break inheritance for *Alloy Meet* and change the access rights on it, the access rights become different from the parent (Start) and its two siblings (Alloy Plan and Alloy Track).
- If you then add a *Marketing group* group to Start, Alloy Plan and Allow Track inherit the Marketing group (because inheritance is selected) but Alloy Meet does not because its inheritance is unselected.

The following image shows the access rights for the **Alloy Track** content; it will not inherit from the parent item and any changes of access rights on Marketing will not be pushed to subitems unless they have the **Inherit settings from parent item** option selected.



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

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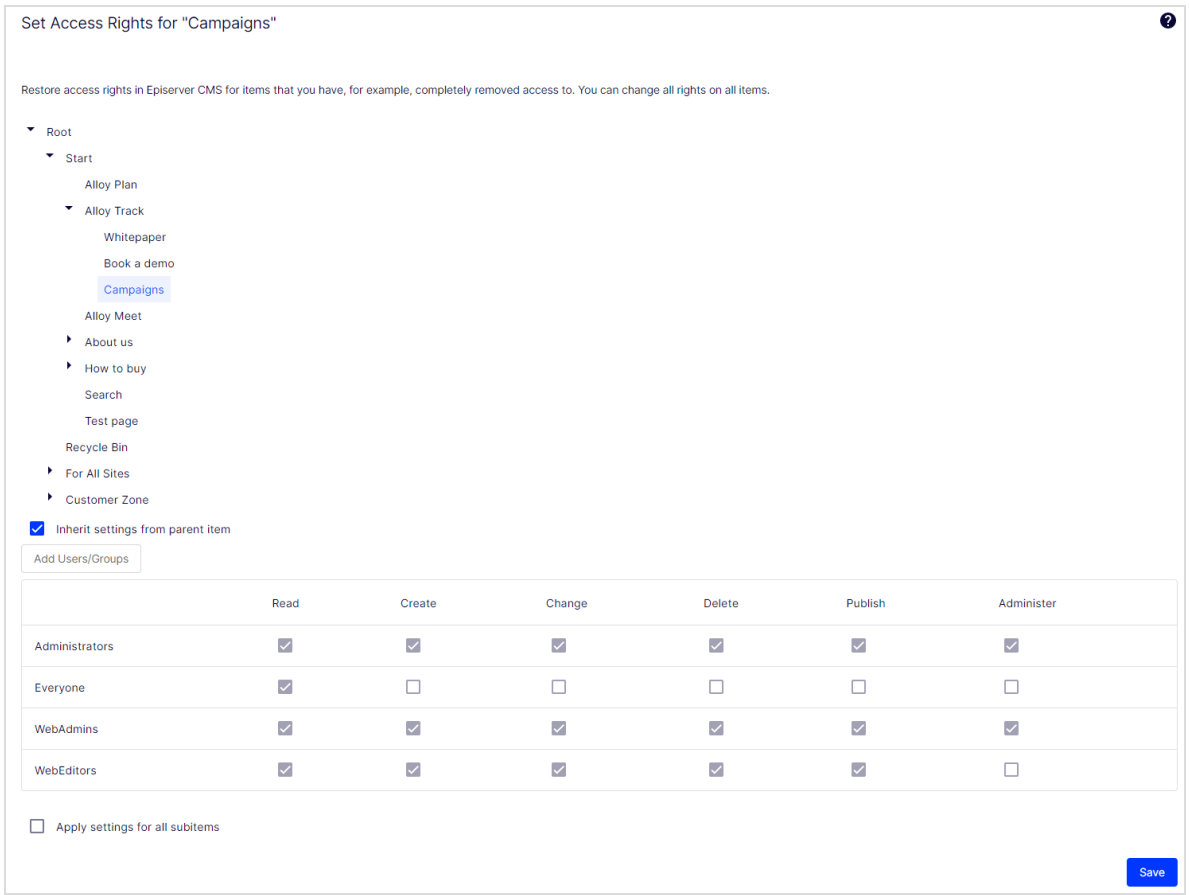

Book a demo is also a subitem of *Alloy Track*, but contrary to *Campaigns*, it has **Inherit settings from parent item** cleared, so its access rights are not the same as the parent content item.

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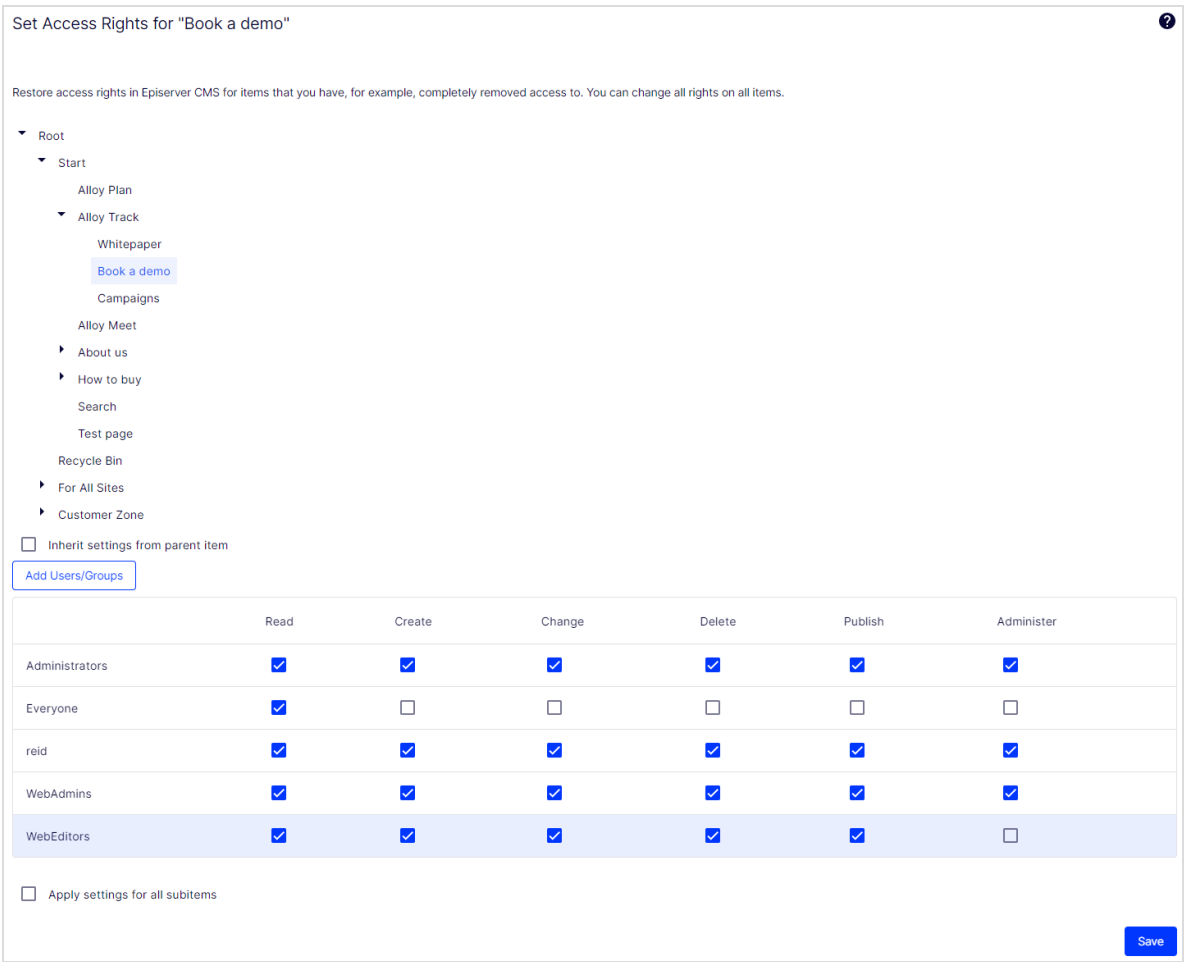

Setting access rights for all subitems

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

For example, the *Alloy Track* content item has *Abbie* as a user with access rights.

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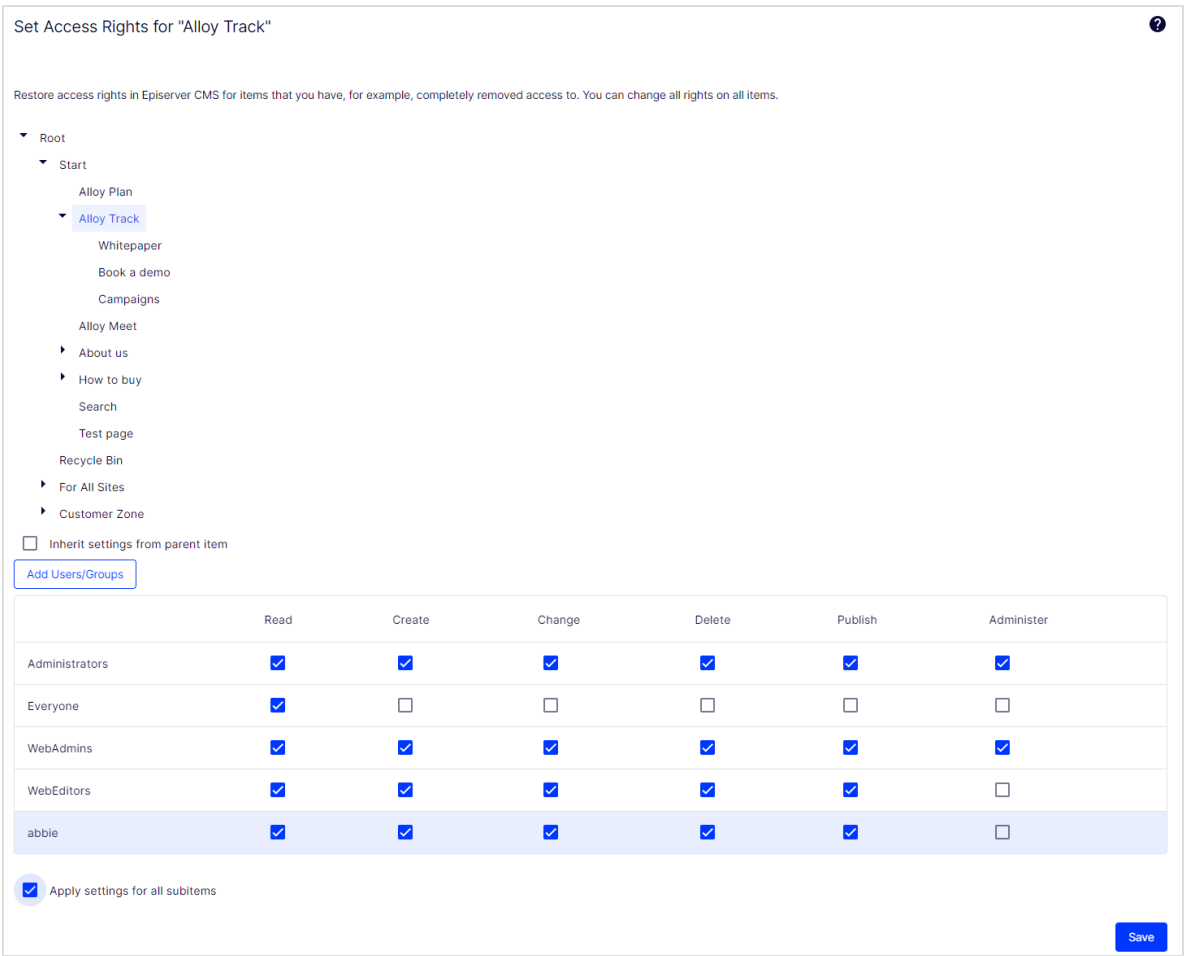

When you select **Apply settings for all subitems**, *Abbie* is added as a user with access rights to *Book a demo* because *Abbie* is part of the *Alloy Track* content item's access rights. *Reid*, who already had access rights to *Book a demo*, remains on the list of access rights, unchanged.

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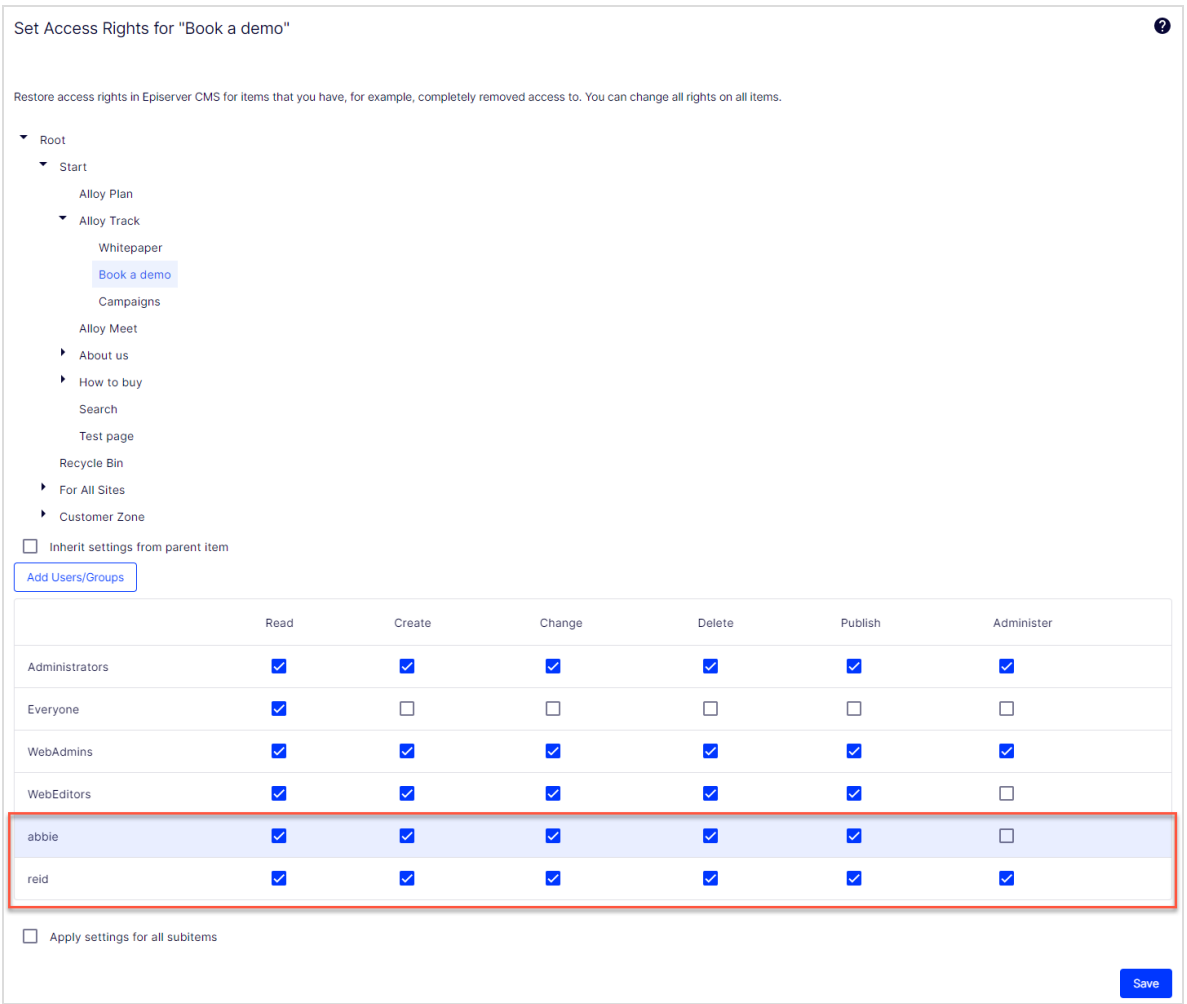

If a parent item and a non-inheriting subitem have the same user or group, and the access rights for the user or group differ between the parent and the subitem, the parent's settings are applied when you select **Apply Settings for all subitems.** For example:

- If the *Alloy Track* parent item has user *Abbie* with only *Read* access set, and *Book a Demo* has user *Abbie* with all access rights set, then **Apply Settings for all subitems** resets Abbie's access rights on *Book a Demo* to only *Read* access.
- Conversely, if *Alloy Track* has user *Abbie* with all access rights, and the subitem has user *Abbie* with only *Read* access, **Apply Settings for all subitems** gives user *Abbie* all access rights on the subitem.

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Removing a user or group from the access rights list

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

Using a visitor group in an access rights list

Visitor groups are used by the personalization feature, and you need administration access rights to manage visitor groups. If you want an editor to manage visitor groups without providing access to the entire admin view, you can make the editor a member of **VisitorGroupAdmins**. This group provides access only to the **Visitor Groups** option in the top menu. **VisitorGroupAdmins** comes with Optimizely but you must add it through admin view > **Admin** tab > **Access Rights** > **Administer Groups** > **Create** > **VisitorGroupAdmins**.

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

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

1. Go to the admin view > **Admin** tab > **Access Rights** >**Set Access Rights**.
2. Select a node in the content tree.
3. Click **Add Users/Groups**.
4. Select **Visitor groups** to view available visitor groups.
5. Select a visitor group and click **OK**.

> **Note:** Visitor groups can only have **read** access.

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Access rights for languages

If your website has content in multiple languages, you can define access rights for languages so editors can create content only in languages to which they have access. Enabled languages are displayed in the **Sites** tab, but only users with access rights to a language can create and edit content in that language. See Managing website languages.

Access rights for the Optimizely platform

See Managing permissions for more information about how to manage access rights for other parts of the Optimizely platform.

Managing users and user groups

For easier and safer maintenance, base access rights on **user groups** rather than individual users.

You can administer user credentials in the following ways:

- Manage users and user groups from the CMS administration view.
- Manage users and user groups in Windows.
- Develop a customized role and membership provider.

> **Note:** Users and groups created in the Optimizely CMS admin view are available from admin view only; they are not accessible from Windows. You cannot add users created in Windows to groups created in Optimizely. See the technical documentation on Optimizely World for information about working with membership and role providers.

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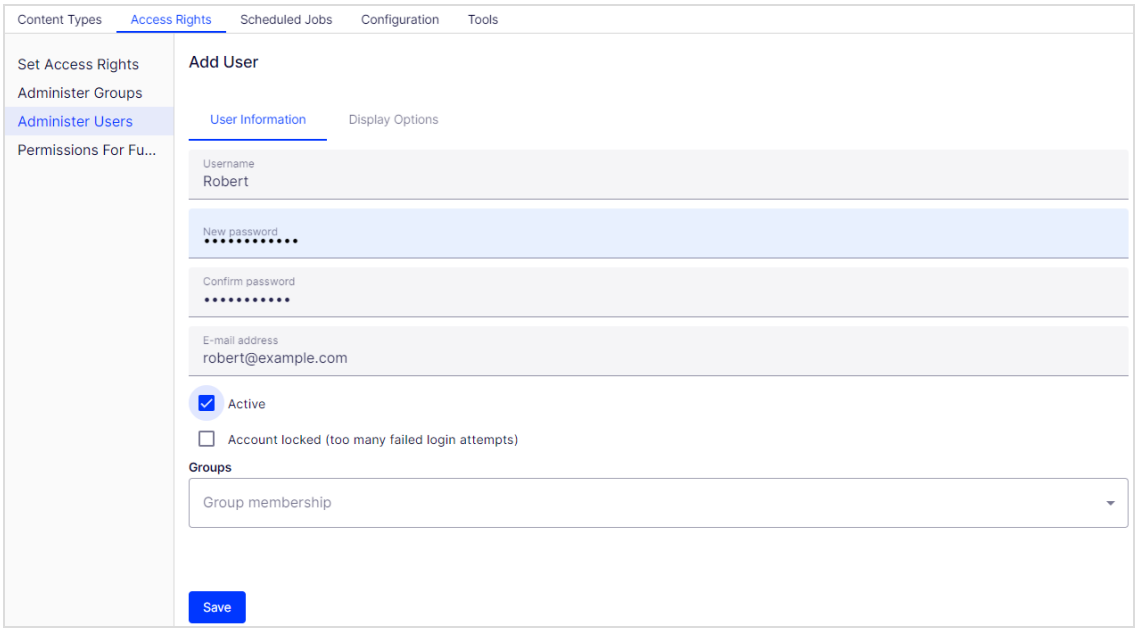
Smaller organizations with few editors tend to use the CMS administration view, whereas larger organizations with many editors tend to use the other options. You can combine these options.

Creating, editing and deleting users

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

1. Go to **Admin > Access Rights > Administer Users**.
2. Click **Add User**.



   Specify a username, password and email address and set the account to **Active**.

   Select none or more user groups to which the user should belong.

3. Under the **Display Options** tab, you can specify a default language for the user interface (optional) and touch support.

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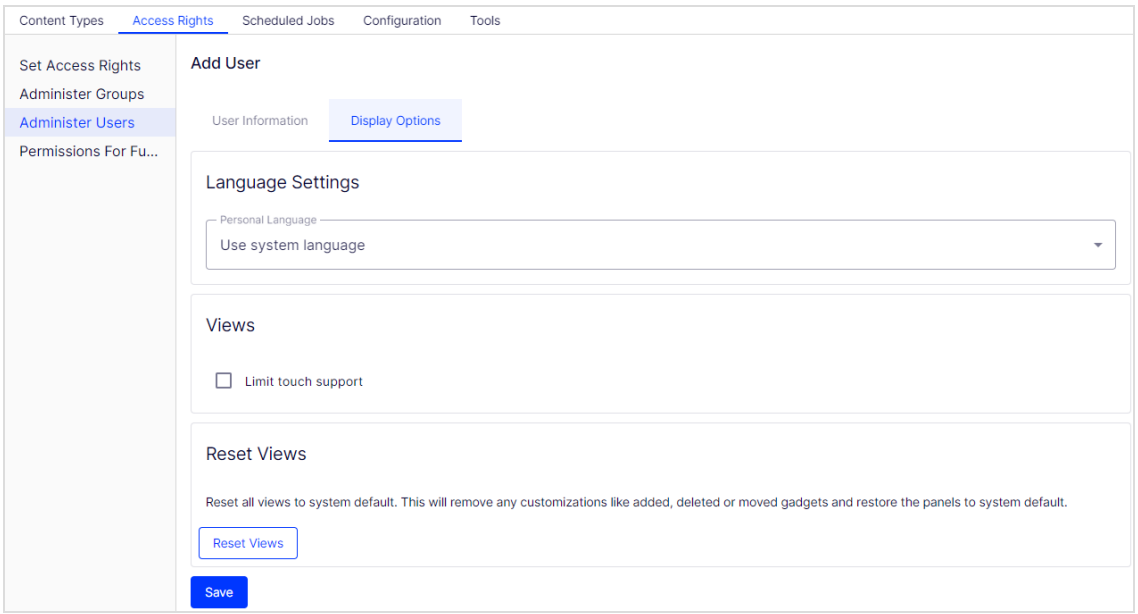


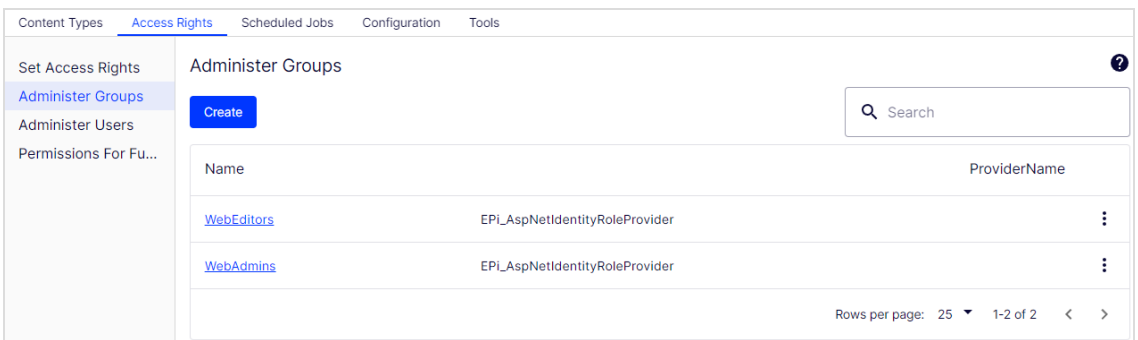
4. Click **Save**.

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

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

Displaying members of a user group

1. Go to **Admin > Access Rights > Administer Groups**.



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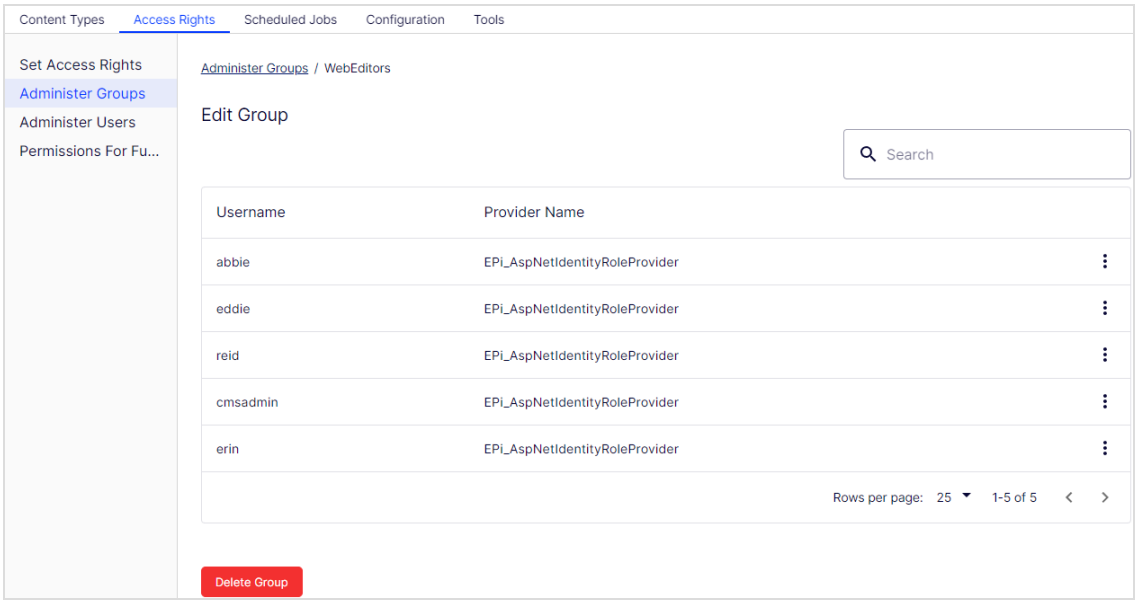
2. Select a group to view its members.



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

Creating and deleting groups in CMS

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

- Click **Create** to create a user group, enter a name, and save your changes.
- Select **Delete** from a group's menu to delete a user group.

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

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

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Scheduled jobs

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

Administering scheduled jobs

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

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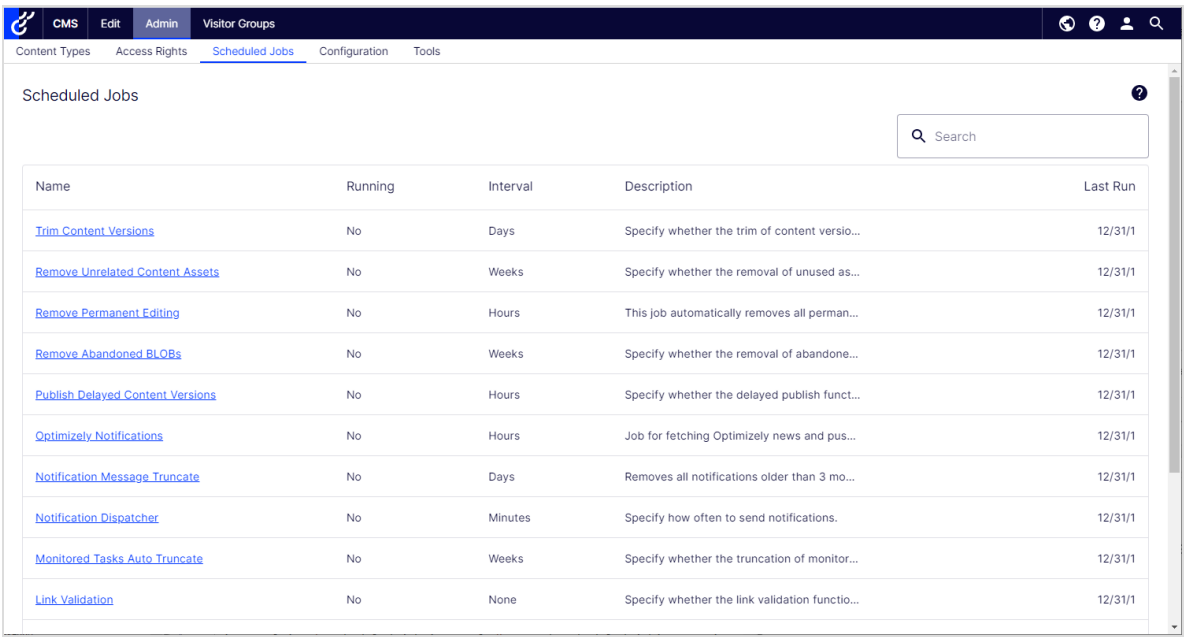

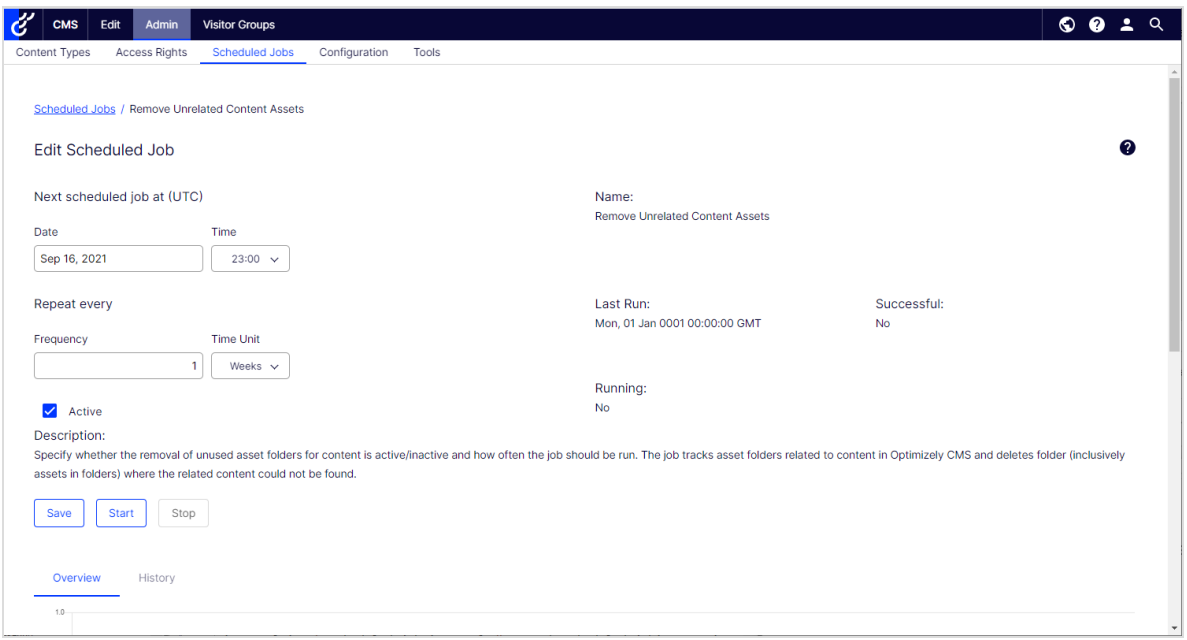

The **History** tab lets you monitor the status and results when a scheduled job is executed. If a job fails, information about it appears under the **Message** column.

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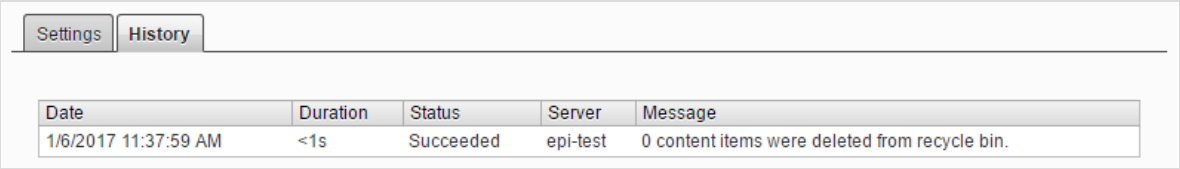

Built-in scheduled jobs

Archive Function

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

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

Automatic Emptying of Trash

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

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

Change Log Auto Truncate

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

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

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Clear Thumbnail Properties

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

Fetch data from Marketing Connectors

The **Fetch data from Marketing Connectors** job improves the performance of the Marketing Automation connectors by fetching and caching databases and lists (wherever applicable). The result is faster load time for web pages with a form mapped to the connector, and also for the **Databases** drop-down list on the Database Mapping screen in the Optimizely Forms user interface.

You can determine when to cache this data by configuring the **Fetch data from Marketing Connectors** scheduled job. To determine how long to cache the data, use the admin view > **Config** tab > **Global Settings** > **Connect For Marketing Automation Settings** > **Cache Duration in Minutes** field.

The job is enabled by default (if you have a Marketing Automation connector installed), and set to run every 60 minutes.

Link Validation

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

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

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

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Monitored Tasks Auto Truncate

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

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

Notification Dispatcher

The **Notification Dispatcher** job is used to send out notifications, such as email notifications, from Optimizely CMS to users at regular intervals.

It is used by the projects feature to send out email notifications of new or updated comments and replies posted in projects, and also by the content approvals feature to send out email notifications on review requests; see **Which actions trigger a notification?** for a list of the actions that will generate a notification.

Emails are only sent out if an action has triggered a notification since the job last executed.

The job is enabled by default, and set to run every 30 minutes.

Notification Message Truncate

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

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

Publish Delayed Content Versions

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

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

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Remove Abandoned BLOBs

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

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

Remove Permanent Editing

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

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

Remove Unrelated Content Assets

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

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

Subscription

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

Optimizely Commerce-related scheduled jobs

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

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Optimizely Search & Navigation-related scheduled jobs

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

Other scheduled jobs

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

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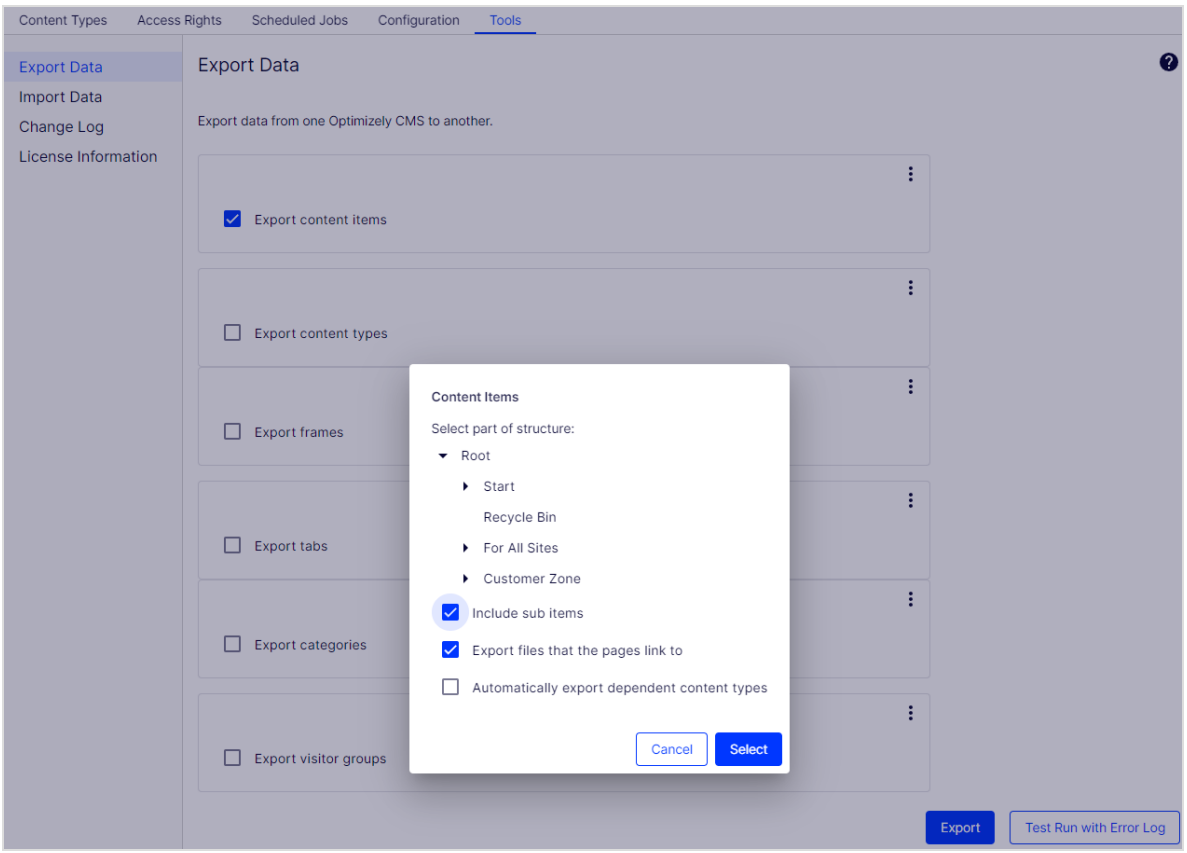
Exporting and importing data

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

Exporting data

You can export the following: content items, content types, frames, dynamic property definitions, tabs, categories, files, and visitor groups.

Select a type of item to export, to display the available items of that type.



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To export content items

1. Go to **Admin > Tools > Export data**.
2. Select an item to export. If your content items contain multiple language versions, all language versions are included in the export package.
3. Optional: Select any of the three check boxes:
   - **Include sub items**. Exports the item's children as well.
   - **Export files that the pages link to**. Exports global assets (such as blocks and images and so on) that the selected item links to.

     > **Note:** Local assets (saved under **For this Page**) are included in the export.

   - **Automatically export dependent content types**. This option is mostly used for older untyped pages, and specifies that the content type is included in the export. For newer, typed pages or if the import website already has this content type, it is not necessary to select this option.
4. Click **Select** to accept your export settings.
5. Click **Export** to download the file package. Your export package is saved to your web browser's default download location.

> **Tip:** To update a single content item through export and import: deselect **Include sub items** and export the item. Then import the item and make sure **Update existing content items with matching ID** is selected.

Importing data

With the **Import Data** function, you can retrieve information exported from the same or another Optimizely website.

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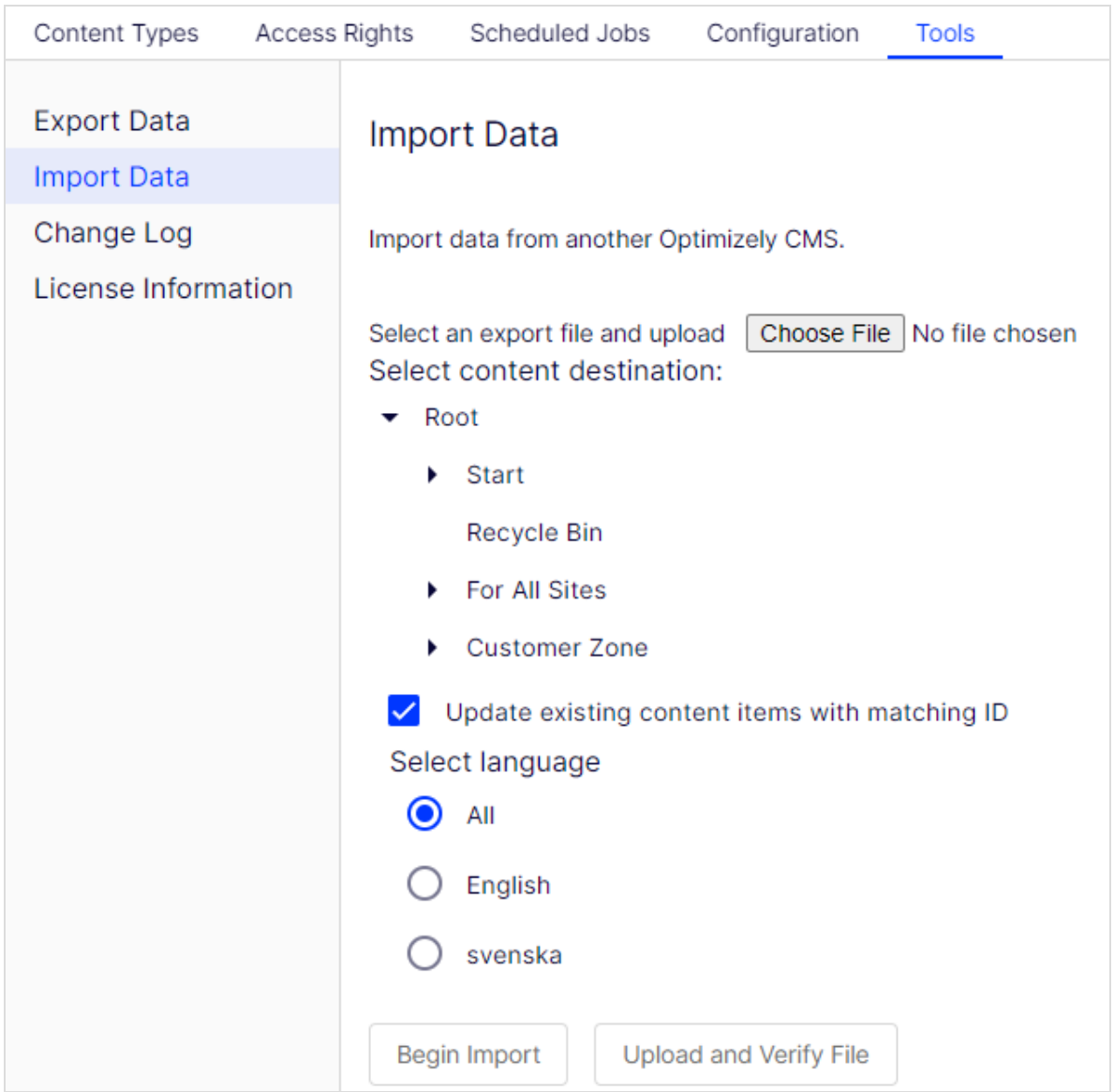

1. Go to **Admin > Tools > Import Data**.
2. Click **Choose File** and select the file package to import. Files must end with *.*epi-serverdata* for the import to work.
3. Select the destination for the imported files.

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4. Select or deselect **Update existing content items with matching ID**:

    - Select the check box if you want to keep the same GUIDs globally unique identifiers for imported items (such as pages, blocks and files) as they had on the exporting site. The import checks whether a GUID already exists and, if it does, that item is updated (if the imported item had a changed date that is later than the existing item). This means that content items with the same IDs are replaced instead of added.

      If your exported pages contained links to global blocks and media, you must select **Export files that the pages link to** when exporting, for the linked global blocks and media to be updated during the import.

    - Deselect the check box if you want to import items with new IDs instead. If you import to the same website as you exported from, blocks and media are merged into folders with the same name in the assets pane.

      Duplicated items get a number added to the item name. For example, exporting item *ABC* and importing it as a copy on the same website results in two items, namely *ABC* and *ABC2*. This also affects the URL, which in the case of the copied item would be *www.examplesite.com/abc2*.

5. If your export package contains multiple language versions, select **All** if you want to import all language versions or one specific language to import only that language version.
6. Click **Upload and Verify File** to verify the file content. The files are read and checked, and verification information appears.
7. Click **Begin Import**.

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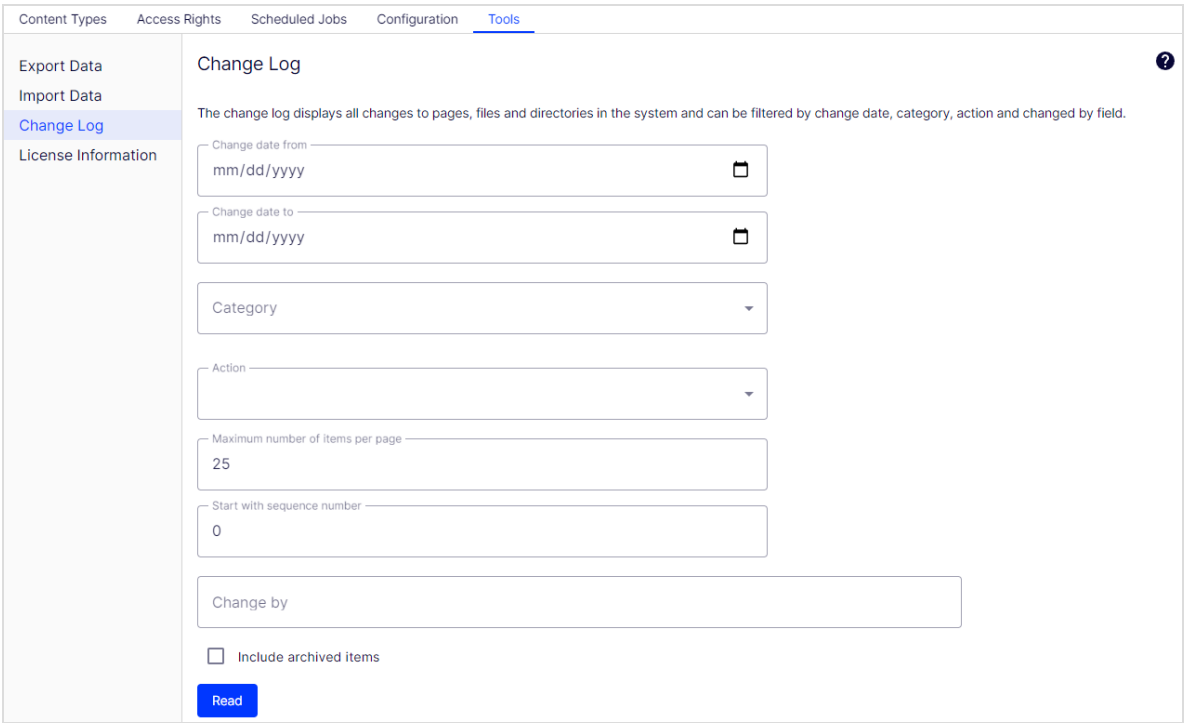
Change Log

By default, all changes to pages, files and directories are logged in the **Change Log** system which is found in **Admin** > **Tools**. You can filter the information in the change log, making it easier to find relevant information.



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

Field name	Description
Change date from	Select a date and a time to view only items that were changed after this time.
Change date to	Select a date and a time to view only items that were changed before this time.

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Field name	Description
Category	From the **Category** drop-down list, you can select an activity type: • **Content** to display changed content items. This option displays items such as pages, blocks and media. • **Message** to display changed messages. (Messages are a type of activity in the projects feature.) • **Project** to display changes that are associated with a project. • **Approval** to display changes that are associated with a content approval sequence. If you do not select an option from the drop-down list, you will see changes to all types of activities. **Note:** Website developers can configure which categories are available, so you may see other categories than the ones mentioned here.
Action	You can filter on actions, such as **Delete**, **Publish** and **Rejected**. **Note:** Website developers can configure which actions are available.
Maximum number of items per page	Limits the displayed number of items on the page. Click the **Previous** and **Next** arrows to browse through the list of items.
Start with sequence number	Enter a specific sequence number to start listing the items in the change log. For example, if you have performed a previous filtering, you can use the sequence number from that occasion and repeat that filtering.
Changed by	To filter for a specific user, enter the Optimizely CMS user name.

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

To remove change log items that are more than one month old and without dependencies, use the Change log auto truncate scheduled job.

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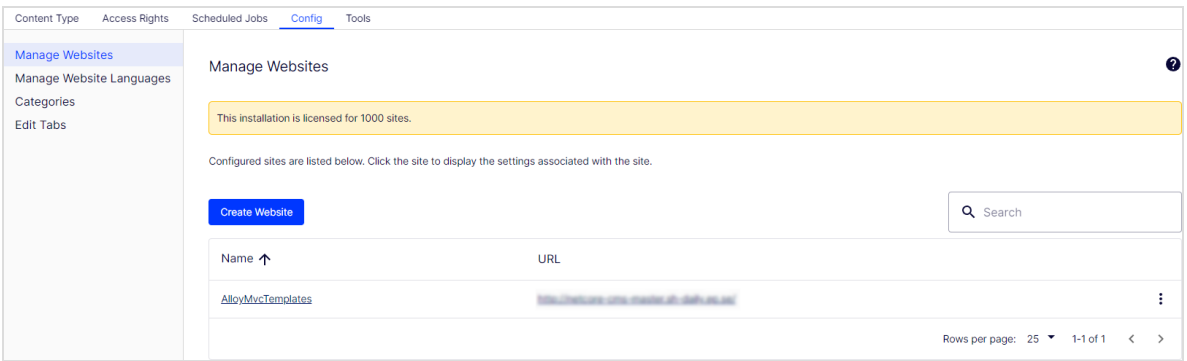
Managing websites

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

> **Note:** If you are not yet on CMS 12, you can view this page in a previous user guide.

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



You can create new websites in the following ways:

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

  When you work in a multi-site setup, you see all sites in the same interface, which makes it easy to work with them. One reason to run a multi-site setup with specific host

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name mapping (that is, a different IIS instance per CMS site) is that you can use different application pools, which means that if one site fails, the other sites continue to run.

Requirements

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

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

Creating and updating a website from admin view

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

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

Site setting	Description
Name	Type a name that identifies the website, such as *Example Site*.
URL	Enter the URL for the site, such as *https://examplesite.com*. If your CMS or Optimizely Commerce site is using Unicode characters in the URL segments, internationalized domain names should be registered in Punycode format. See also: Internationalized Resource Identifiers (IRIs) on Optimizely World.

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Site setting	Description
Start page	Select the page to which the visitor is sent if only a host name is specified.
Use site-specific assets	Select this check box to ensure that assets, such as blocks and media, for this site are not available for use on other sites in the installation. This option affects the folder structure editors see in the assets pane.
Host names	Optional. Enter a specific URL, such as *examplesite.com*. If you do not name the website, it is automatically named with the URL you have entered. One of the sites in the installation must be bound to the * host name. That site is used as a fallback when an exact match for the host name used by the visitor cannot be found. This setting is less important in a single-site scenario, because you can have only one site configuration. However, in a multi-site scenario, you must make sure that host bindings active in IIS are mirrored in the corresponding site configuration. For example, you want to add *examplesite.se*. Usage: The host name list is evaluated by the application in two different scenarios: • **Request routing**. When serving a request, the application evaluates the host list to see which site and language (culture) that should be served. • **Cross-site linking**. When generating links to another site or culture, the host list is evaluated to find the host name to use for constructing the link URL. **Note:** A wildcard * mapping must be accompanied by an explicit host name to support cross-site link generation.
Type	• **Primary host**. A primary host is the preferred host name when generating links between sites or languages (cultures). If no host is defined as primary, the first non-redirected host and non-edit host is used. You can define only one primary host per language plus one primary that is unbound to any language. • **Edit host**. An editing host is the preferred host name to use when editing a site. This host name is used for all links between sites when the users are in the editing view. If no editing host is defined, the primary or first found host is used. You can define only one editing host per site

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Site setting	Description
	and you cannot bind it to any language. Users are not forced to the edit host for editing and remain on their current host if the editing view is requested from another host on the site. • **Redirection host**. A redirection host defines that requests using this host name are redirected to a different host name. Such requests are redirected to the primary host or, if none is defined, the first non-redirected host found. You can set redirection to permanent or temporary, which determines the type of HTTP redirect status that should be used. Redirected host names are never used when generating links. There can be any number of redirection hosts defined as long as there is at least one primary or standard host name bound to the same language.
Culture	Select the default language for when a visitor accesses the website using the host name.
Scheme	Select the preferred scheme to be used for this host. This affects only the generation of links to the site as incoming requests are matched to the host name regardless of scheme.

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

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

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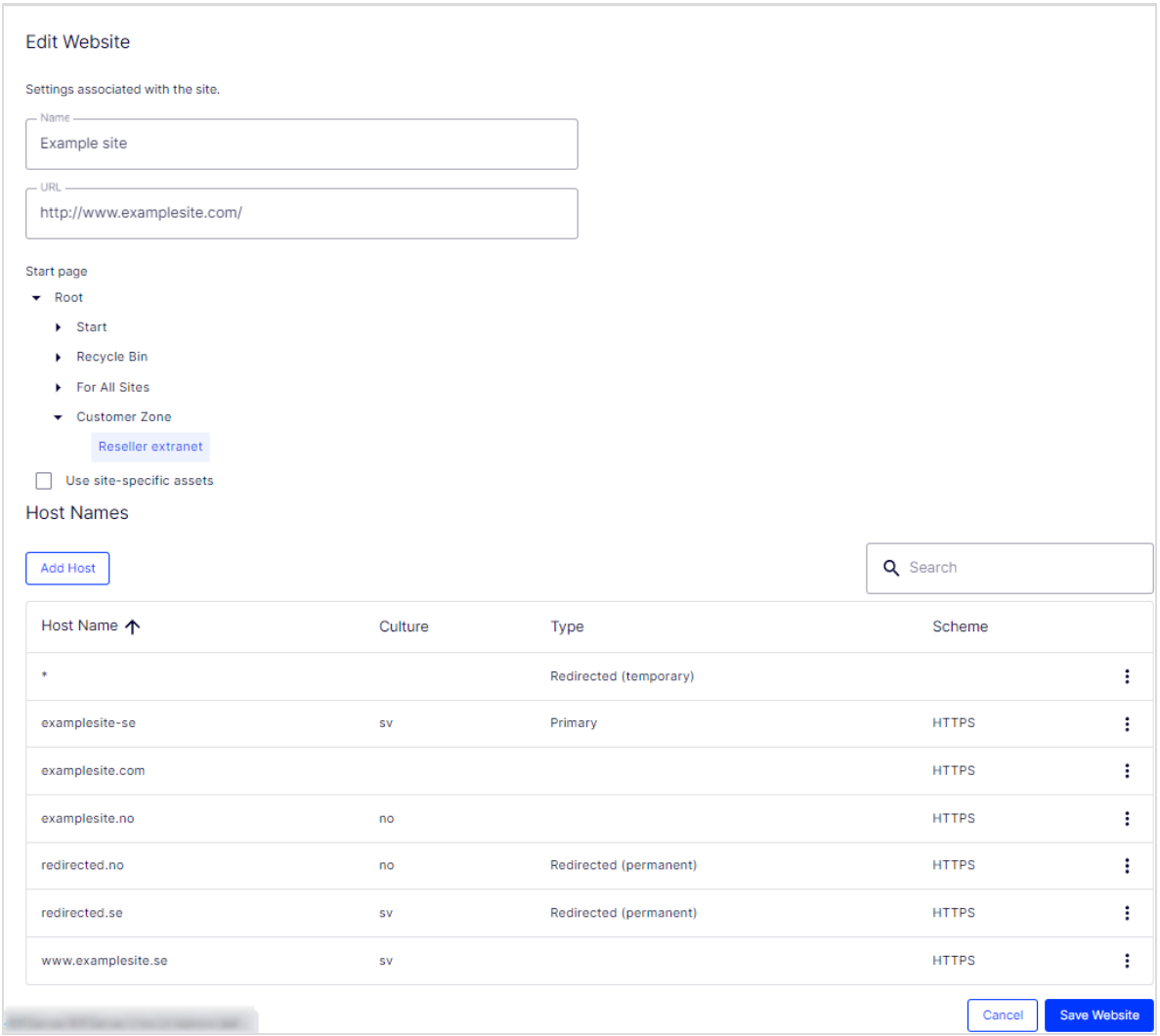

This example would lead to the following behavior:

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

  > **Note:** Canonical links added in the templates should point to https://examplesite.se

- A request to https://redirected.no/page/ is redirected to https://examplesite.no/page/ using an HTTP 301 response as this is the only Norwegian host that is not redirected.

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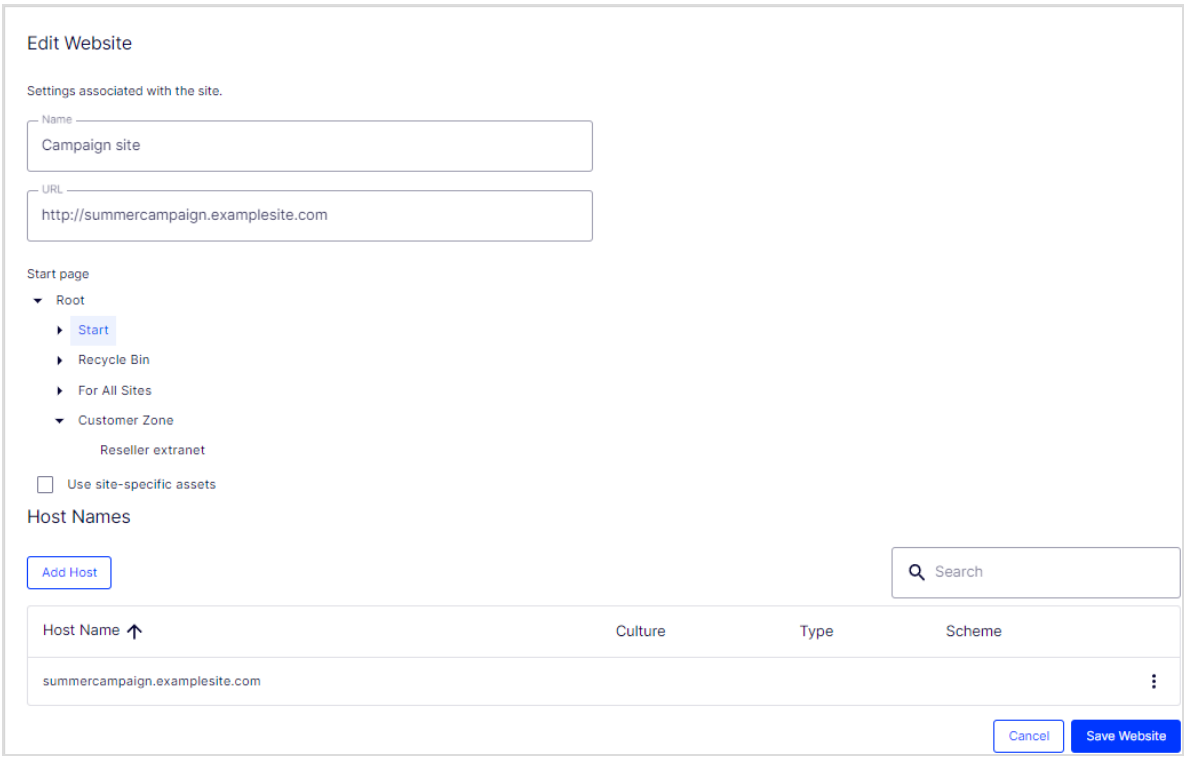
- A request to https://redirected.com is redirected to https://examplesite.com using an HTTP 302 response as per the wildcard specification.

Example: Campaign website

The following example shows a campaign website:



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Managing website languages

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

> **Note:** When an editor copies a page, all language versions are copied regardless of the editor's language rights. This means that if an editor with access rights to English only, copies a page that exists in English and French and pastes that somewhere, both language versions are copied.

Language overview

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

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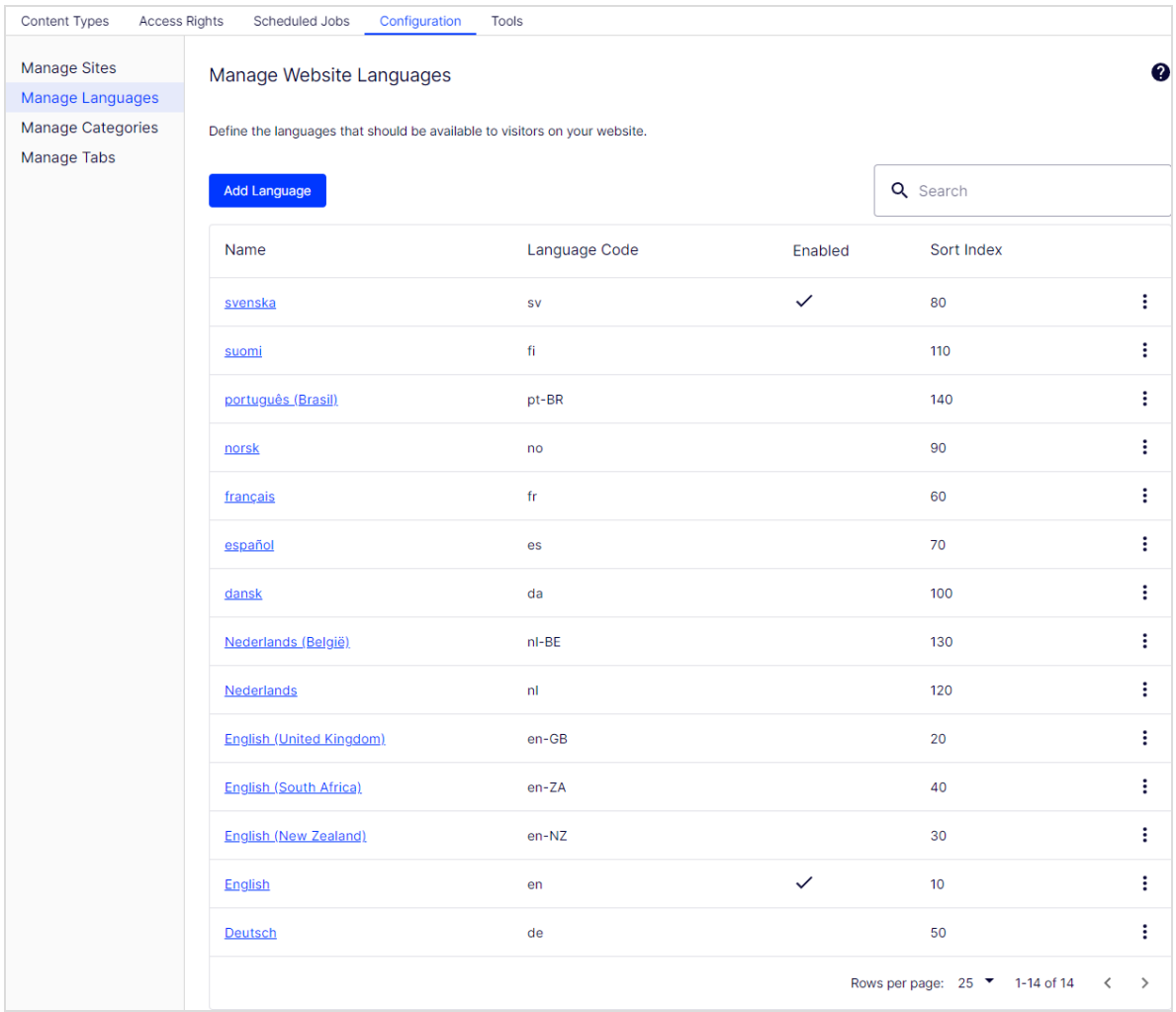

Adding and enabling languages

Before an editor can edit content in different languages, you need to add and enable the languages in the admin view and then enable them for editing in the CMS edit view.

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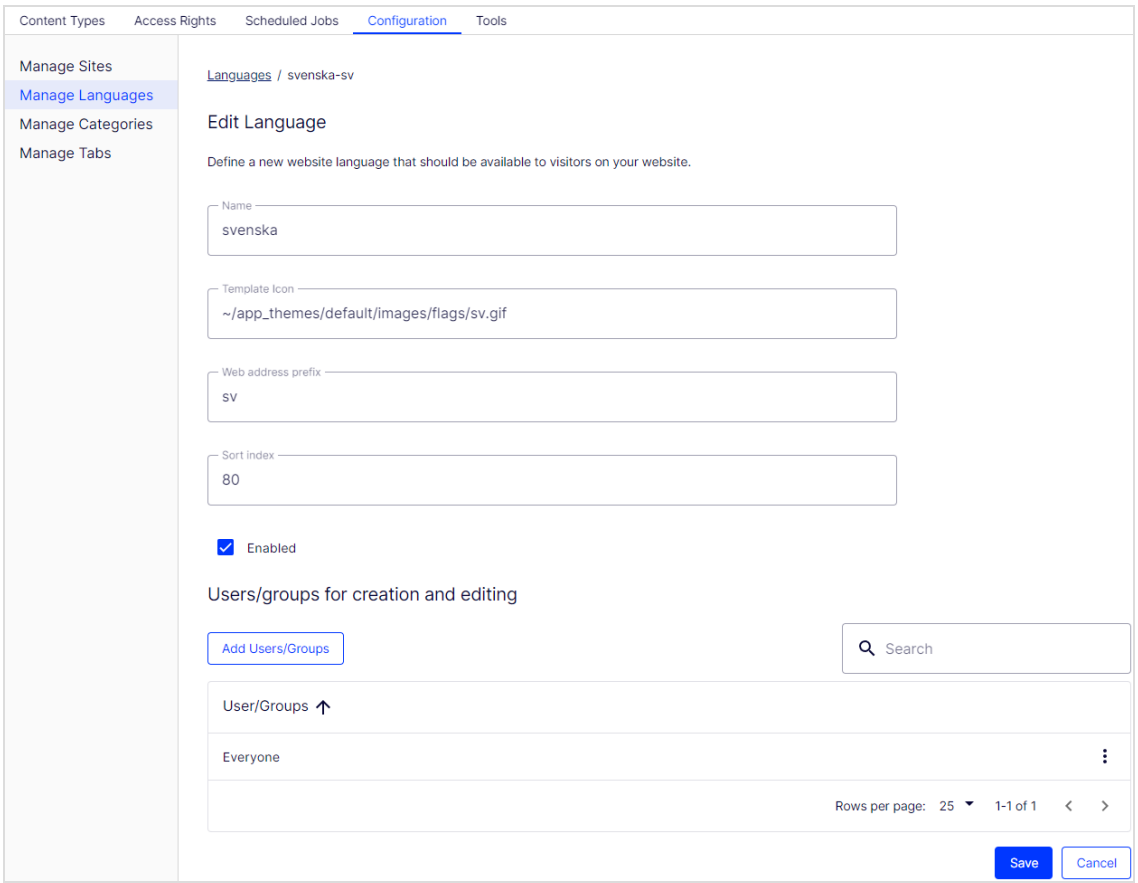
1. Adding and editing languages

a. Go to **Admin > Configuration** > **Manage Languages**.

b. Click a language to edit its settings, or click **Add Language** to add a new language. A list of available language codes appears. Select a language code by clicking the name.



- In **Name**, enter a name for that language to be shown in the edit view. The field contains the name of the language encoding, but you can change this if you want.
- In the **Template icon** field, enter the relative path to an icon that symbolizes the language. Several flags are zipped in *modules_protected\CMS.zip\App_Themes\Default\Images* folder. If you want to make your own icons, make them 15x15 pixels so they fit properly in the edit view.

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- In the **Web address prefix** field, you can provide a specific prefix to show the content of the relevant language. If you do not provide a prefix, the language code is used, such as www.company.com/nl.
- Select **Enabled** if you want the language to be active for editing in edit view. This option also affects whether the language is available to website visitors. A disabled language is not visible in the edit view. Existing content in that language is still accessible, but it cannot be edited.
- Click **Add Users/Groups** to define which editor groups have access to create and edit content in this language (see below). When you add a language, it is available for the **Everyone** group by default. Only users with access rights for a language have it available on the **Sites** tab, and can create and edit content in that language.

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

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

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

c. Click **Save**.

2. Enabling a language on a website (if not already done)

a. Go to **Admin > Configuration** > **Manage Languages**.
b. Click the desired language in the list.
c. Select **Enabled** and click **Save**.

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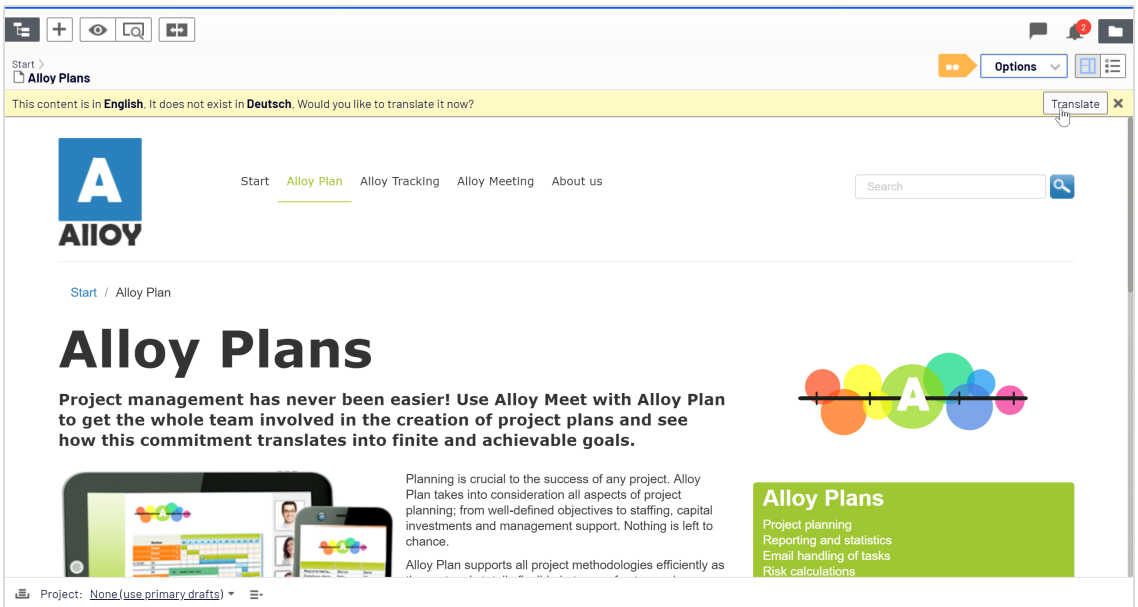
3. Enabling a language for editing in CMS

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

a. In the CMS page tree, select the root page for the branch for which you want to enable the language. In this example, you want to make "French" available for the entire site, so the language setting is defined on the start page.
b. Open the page in **All Properties** editing.
c. Select **Tools** and **Language Settings** in the header.
d. Deselect **Inherit settings from the parent page** to allow changes.
e. Under **Available Languages**, select **Change**.
f. Select the language you want to enable, click **Save**, and close the dialog box.
g. For a correct display, the website start page also needs to be available in the new language. To do this, switch to the newly activated language, go to the start page, select **Translate**, then publish it.



Once the language is enabled as described above, it is available for content translation in the Optimizely CMS Editor Guide.

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Deleting an existing language

Remove a language from the website by opening the language for editing, and clearing the **Enabled** option.

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Managing approval sequences

Approval sequences are used both for Content approvals, which is part of Optimizely CMS, and the Change approvals add-on.

- Using **Content approvals** is a way to make sure that *content* is reviewed and approved before it is published. If content approvals have been defined for an item, the editor cannot publish it but has to set it as *Ready for Review*. For a description of content approvals from an editor's perspective, see Content approvals in the CMS Editor User Guide.
- **Change approvals** lets you make sure that certain *actions* that affect the website structure or content are reviewed and approved before they are applied. See Change approvals in the CMS Editor User Guide for more information on which actions that are affected.

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

How it works

You define an approval sequence for a specific page in the page tree or for a global or site-specific assets folder in the assets pane. You can then choose to let the item's or folder's children inherit the approval sequence, create a new approval sequence for the children or disable approval sequences for the children. For detailed information how approval sequences work on assets, see Approvals on assets.

Both individual users and user groups can be added. User groups and individual reviewers must have **Read** access right and at least one other access right to the content item to review and approve it. We recommend **Read** and **Create** because Create has the least capabilities since it prevents any actions on the content item itself, or **Read** and **Change** because Change alone cannot affect the visitor, unlike Delete and Publish. See **Access rights** and Managing users and user groups.

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

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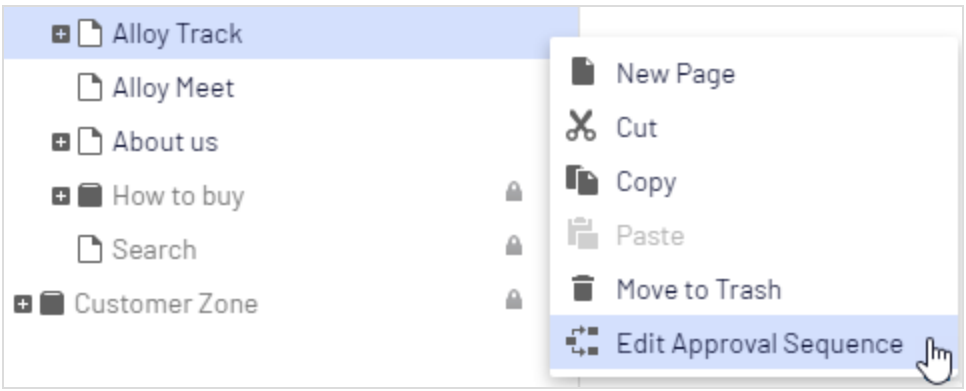
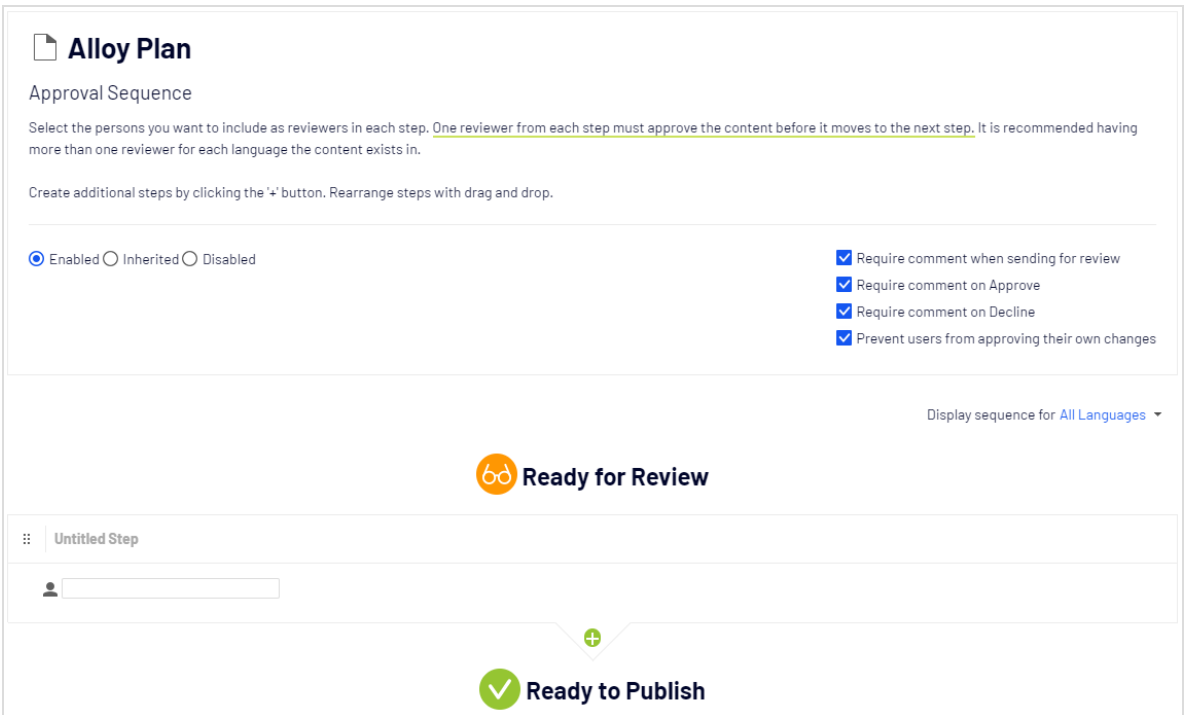


In the approval sequence overview, you define the number of approval steps (you can have as many as you like), and also the persons responsible for review and approval in each of the steps.



Content approvals on assets

Each page in Optimizely can have its own approval sequence. Assets, such as blocks and media (and also forms and catalogs if you have Optimizely Forms and Optimizely

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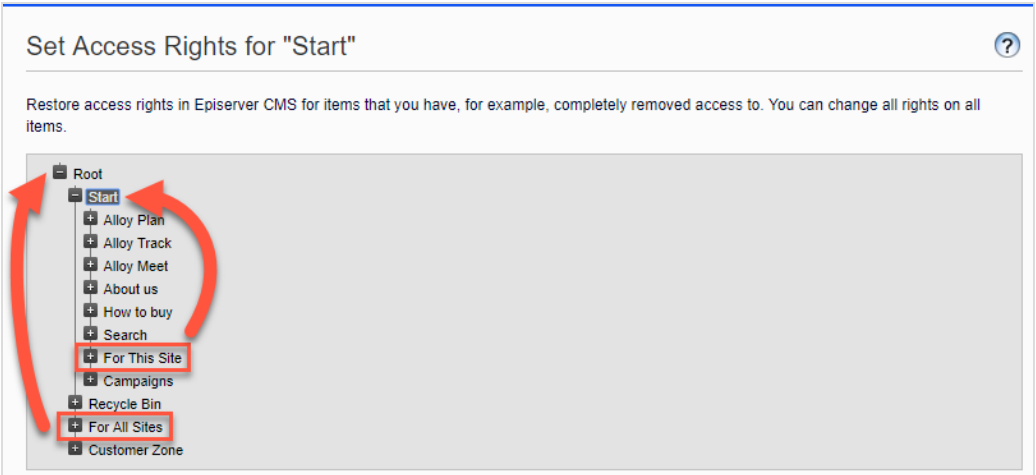
Commerce respectively installed), cannot have individual approval sequences. Instead, the approval sequence is set on each assets folder, and all assets in the folder have the same approval sequence set. *Global* and *site-specific assets folders* can inherit their approval sequence from a parent folder (up to the site root), or you can define a unique sequence for it (or disable it completely so that assets in the folder do not have to be approved). If there is no sequence set on a parent item, children inherit the disabled state.

> **Note:** Blocks and media in global (For All Sites) and site-specific (For This Site) folders inherit the approval sequence from the parent node by default. The content inherits from the **site root**, which is not the same for global and site-specific folders. The global assets folders inherit from **Root**, while site-specific assets folders inherit from the site's root, that is **Start** in the example image below.
>
> 
>

Local assets folders inherit their approval sequence from the page they are associated with. See Folders in the CMS Editor User Guide for a description of global, site-specific and local folders.

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

> **Note:** The following description assumes you are using Content approvals but not Change approvals. If you are using Change approvals, all moving of folders and assets will trigger an approval

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> sequence which must be approved before the folders or files are moved.

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

Folders

- Moving a **folder** to another **global or site-specific folder**. The folder keeps its original approval sequence. You can move the folder even if items in the folder are in review.
- Moving a **folder** to a **local assets folder**. The folder's approval sequence is changed to the local assets folder's sequence. You cannot move the folder if items in the folder are in review.

Assets

- Moving an **asset** to a **global or site-specific folder**. The approval sequence on the asset is changed to the new folder's approval sequence. You can move an item even if it is in review. However, in that case, it continues its original content approval sequence until it is approved or rejected. After that it has the same approval sequence as the new folder.
- Moving an **asset** to a **local asset folder**. The approval sequence on the asset is changed to the new folder's approval sequence. You cannot move the asset if it is in review.

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

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

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

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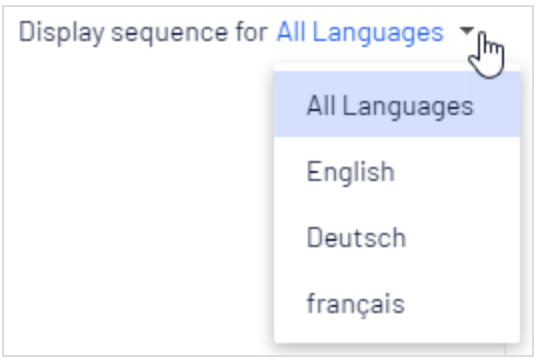
Content approvals on multi-language sites

If you are working with a multi-language site, you can define different reviewers for the different languages in each step. Each language must have at least one reviewer, but it is recommended to have at least two reviewers per language. This is especially important if you select the **Prevent users from approving their own changes** check box, since an item could otherwise get stuck in the review process if the review request is started by a user who is also the only reviewer.

Items, such as images, that do not have a language set can be approved by any reviewer (even by reviewers that only have access to a specific language).

You can view how the approval sequence is defined for all languages or for each language individually by using the **Display sequence for [*language*]** drop-down list.



Setting up an approval sequence

Setting up an approval sequence (single language website)

This section describes how to set up an approval sequence for one language. If your website uses multiple languages, see **Setting up an approval sequence on a multiple languages website**.

1. Open the approval sequence overview from an item's context menu (in the navigation pane or assets pane).

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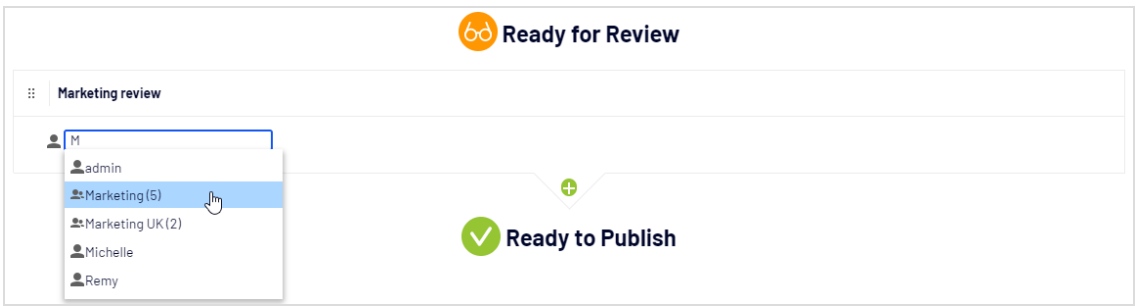
2. In the first step, type the first letter of the reviewer's name. Select the reviewer from the list of suggestions. You can also add a user group. Groups have a special group icon in the list of suggestions and you can also see how many users are included in the user group.

> **Note:** User groups and individual reviewers must have **Read** and at least one other access right, such as **Create** or **Change** to the item to review and approve it.
>
> It is recommended not to add large groups. Partly because users tend to think someone else will review if there are many responsible reviewers, and partly because many notifications will be sent out, which may annoy users. There is a setting in the *web.config* file which triggers a validation warning when you add a group with members exceeding this setting, and it also limits the amount of notifications sent to the users in the group. If it is set to 100, only 100 users will get email notifications even if the group contains 150 users. See Configuring the CMS user interface in the CMS Developer Guide on Optimizely World.



3. If you added an individual reviewer, add at least one more reviewer to the step. You should have at least two reviewers in each step, in case one of the reviewers is unable to review and approve.
4. Optional: Click **Untitled Step** to rename the step to something more descriptive, for example *Product marketing* or *ISO compliance review*.
5. Optional: To add more steps to the approval sequence, click **Add**. You can rearrange the steps by drag and drop.

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6. Optional: To require a review requester to enter a comment on the review request, select the **Require comment when sending for review** check box.
7. Optional: To require a reviewer to enter a reason for approving or declining the content, select the **Require comment on Approve** or **Require comment on Decline** (or both).
8. Optional: Select **Prevent users from approving their own changes** if the user who sends a review request should not be allowed to approve the changes even if the review requester is one of the appointed reviewers.
9. Click **Save**.

Setting up an approval sequence for children items

When you have defined an approval sequence for an item, you can define if its children have to be approved or not.

1. Open the approval sequence overview from a child item's context menu.
2. Depending on how you want to set up the item's approval sequence, select one of the three radio buttons:
   - **Enabled**. This setting lets you edit and define the approval sequence any way you what. The approval sequence is not connected to the parent item's approval sequence. Set up the sequence in the same manner as described in the section above.
   - **Inherited**. This setting locks the approval sequence for the current item and it gets whatever settings its parent has. If the parent item's approval sequence is changed, so is the approval sequence for the current item.
   - **Disabled**. This setting disables the approval sequence for the item and it does not have to be approved.

> **Note: Inherited** is set by default, so if you do not define an approval sequence for an item's children, they automatically get the same approval sequence as the parent. If inheritance is set on children and the approval sequence is disabled on the parent item, the children inherits the disabled state. Local assets folders inherits the approval sequence set on the associated page or block.

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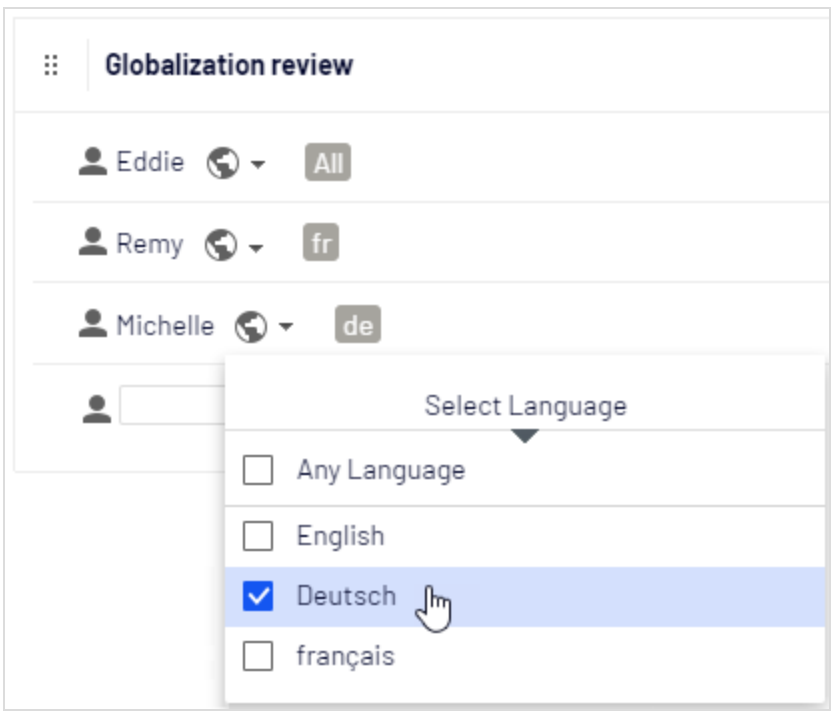
Setting up an approval sequence on a multiple languages website

> **Note:** The language setting only applies to Content approvals. Change approvals does not take this setting into consideration; all appointed reviewers can approve changes in all languages.

1. Open the approval sequence overview from an item's context menu.
2. In the first step, type the first letter of the reviewer's name. Select the reviewer from the list of suggestions. You can also add a user group. Groups have a special group icon in the list of suggestions and you can also see how many users are included in the user group.
3. Click the icon and select the languages the reviewer or group of reviewers can approve in the **Select Language** drop-down list. A reviewer or group of reviewers can approve content in one, several, or all languages.



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> **Note:** There is a difference between selecting **Any language** and selecting all languages one by one. If you select Any language, the reviewer can approve an item in any language it exists in, which also includes any new languages you may add in the future. If you select all available languages one by one, these are the only languages the reviewer can approve content in. If you add a new language in the future, the reviewer does not have the rights to approve in that language.

4. If you added an individual reviewer, add at least one more reviewer to the step. You should have at least two reviewers per language in each step, in case one of the reviewers is unable (or not allowed as the review requester) to review and approve.
5. Optional: Click **Untitled Step** to rename the step to something more descriptive, for example *Product marketing* or *ISO compliance review*.
6. Optional: To add more steps to the approval sequence, click **Add**. You can rearrange the steps by drag and drop.
7. Optional: To require a review requester to enter a comment on the review request, select the **Require comment when sending for review** check box.
8. Optional: To require a reviewer to enter a reason for approving or declining the content, select the **Require comment on Approve** or **Require comment on Decline** (or both).
9. Optional: Select **Prevent users from approving their own changes** if the user who sends a review request should not be allowed to approve the changes even if the review requester is one of the appointed reviewers.
10. Click **Save**.

Editing an approval sequence

Open the approval sequence from the content item's context menu and make sure that the **Enabled** radio button is selected. Edit and save the approval sequence as described in **Setting up an approval sequence**. You can rearrange the approval steps by drag and drop. Hover over a group name to see the users included in the group.

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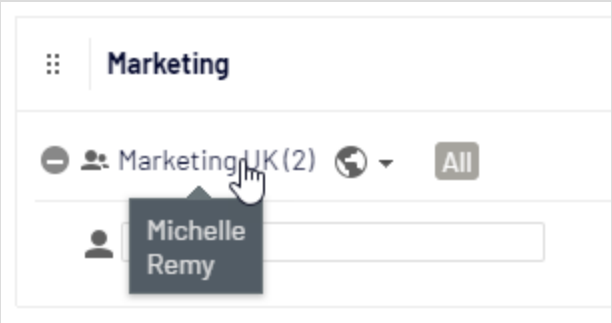
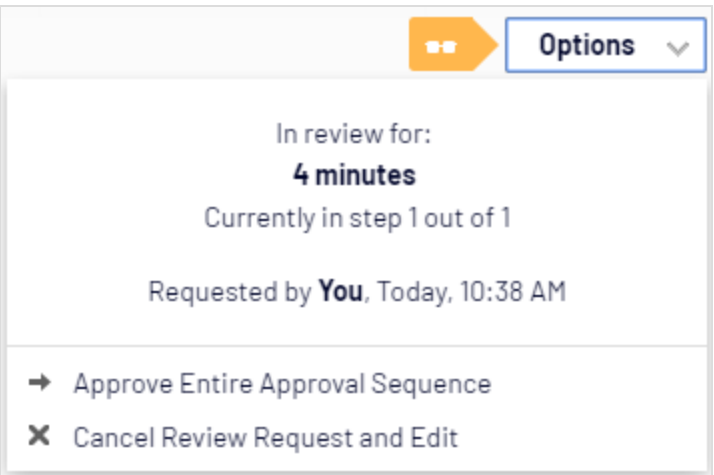


> **Note:** If the selected content item has children that are set as **Inherited**, they will inherit all changes.

Approving and canceling approval sequences

As an administrator, you have the right to approve the entire approval sequence in one go, and to cancel a review request. You do that from the **Options** button. When you are approving an entire approval sequence, you are required to motivate why you are skipping the approval sequence and approving all steps. As administrator, you can always approve the entire approval sequence even if you sent the review request yourself and **Prevent users from approving their own changes** has been selected.



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Deleting an approval sequence

You cannot delete an approval sequence but you can disable it. Open the approval sequence from the item's context menu and select **Disabled**. The item can now be published immediately and does not have to be approved. If the selected content item has children that are set as **Inherited**, these children do not have to be approved.

Commenting on content approvals

As an administrator, you decide whether review requesters have to add a comment on the review request, and if reviewers have to add a reason when they approve or decline content or not. An exception to this is when you approve an entire sequence, in which case you are always required to add a comment. For more information on commenting, see the Collaboration between editors topic in the CMS Editor User Guide.

The comments will be visible in the notification list in the user interface and in email notifications. Comments are also displayed in the project overview, if the content item in review is associated with a project.

All comments are stored in the database as part of the change log and can be used later on for auditing purposes without using projects.

Four-eyes principle

Certain businesses have the requirement that at least two persons must approve content or changes to a website before the content is published or changes applied. To achieve this, you need to set up an approval sequence with at least two steps, and at least two reviewers in each step.

To avoid that one of the reviewers in a step happens to be the user who starts the review, and thereby can evade the four-eyes principle by approving their own changes, you also need to select **Prevent users from approving their own changes** in the approval sequence.

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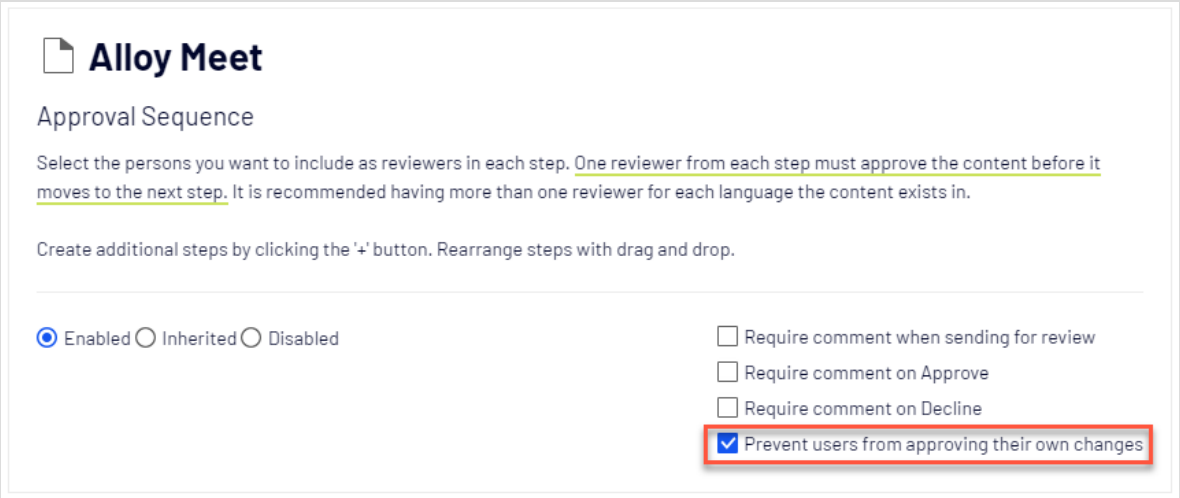

Using notifications

Appointed reviewers can get notifications in the user interface (the bell icon

shows the number of new notifications) and by email. These notifications let the reviewers know that they have a review request waiting. The editor who started the review request is also notified when the reviewers approve or decline the request.

Which actions trigger a notification?

This table shows which actions generate notifications for the different roles in the content approval workflow.

Role	Receives notification when:
The user who sets the item to Ready for Review	• a reviewer approves a review request. • a reviewer declines a review request. • an administrator force approves all steps in an approval sequence. • the review request is canceled by an administrator.
Reviewer	• an item is ready to be reviewed by the user. • a review request is declined in the current (that is, the same step as

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Role	Receives notification when:
	the user has been defined in) or in a later step of the approval sequence. • a review request is canceled in the current or a later step of the approval sequence.

User interface notifications

For the notifications in the user interface to be instantly displayed, your web server needs to have WebSocket support enabled. See WebSocket support on Optimizely World. If WebSocket support is not enabled, editors need to refresh the user interface to see the notifications.

Email notifications

For the email notifications to work, you need to configure your SMTP server with a *from* address. See Configuring your email server on Optimizely World.

A scheduled job, **Notification Dispatcher**, determines how often email notifications are sent out to users. The job gathers all notifications into one summary email which contains the user's all content approval notifications generated since the last email. The scheduled job is set to run every 30 minutes by default. See Scheduled jobs for more information on how to configure this scheduled job.

If you want emails to be sent out immediately, this can be configured by a developer through code, see Configuring email notifications for content approvals in the Optimizely CMS Developer Guide on Optimizely World.

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Creating categories

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

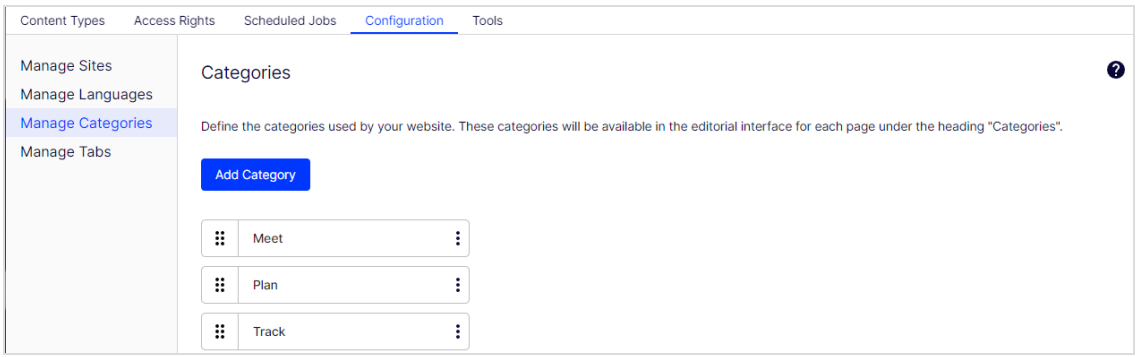
In Optimizely CMS a category classifies content, such as for building filtering features for search and navigation. You create categories in admin view, and apply them to content in edit view.

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

Adding a category

Add a new top-level category as follows:

1. Go to **Admin > Configuration** and select **Manage Categories**.



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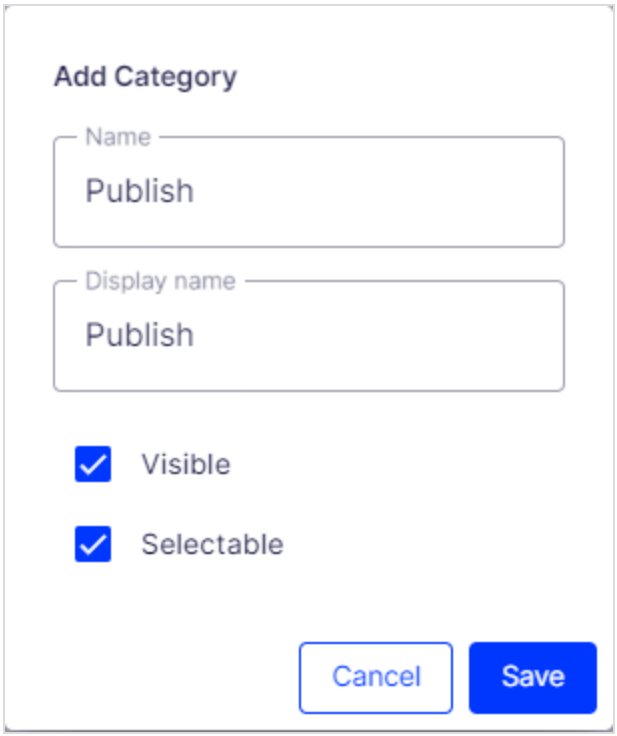
2. Click **Add Category**.



   a. Specify a name in the **Name** field. This name is used in code when building category-based functionality.
   b. Enter a name in the **Display name** field. This name is visible in edit view when a user selects categories. You can also language-encode this field.
   c. Select **Visible** if you want this category to appear in the **Select Categories** dialog box in edit view.
   d. Select **Selectable** if you want this category to be selectable in the **Select Categories** dialog box in edit view.
3. Use the grab bars if you want to move this category higher or lower in the list. This sequence determines the order in which categories appear in the **Select Categories** dialog box.
4. If you want to add a subcategory to a top-level, select **Create Subcategory** from the menu. Add the subcategory in the same way as the top-level category.

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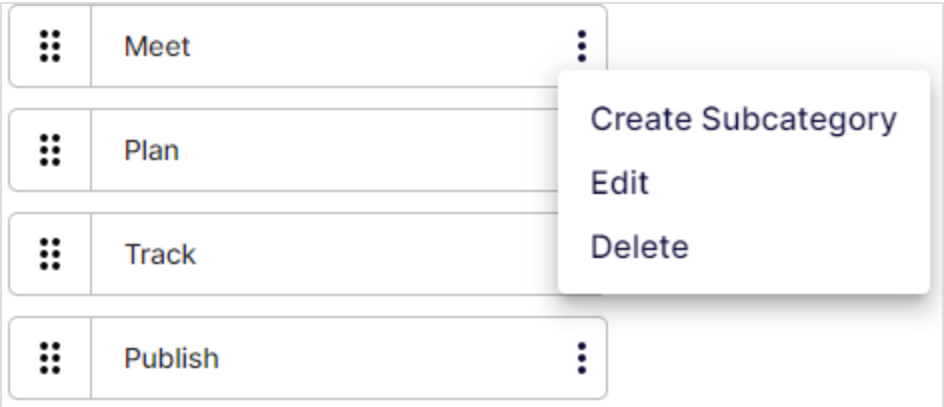

Deleting or changing a category

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

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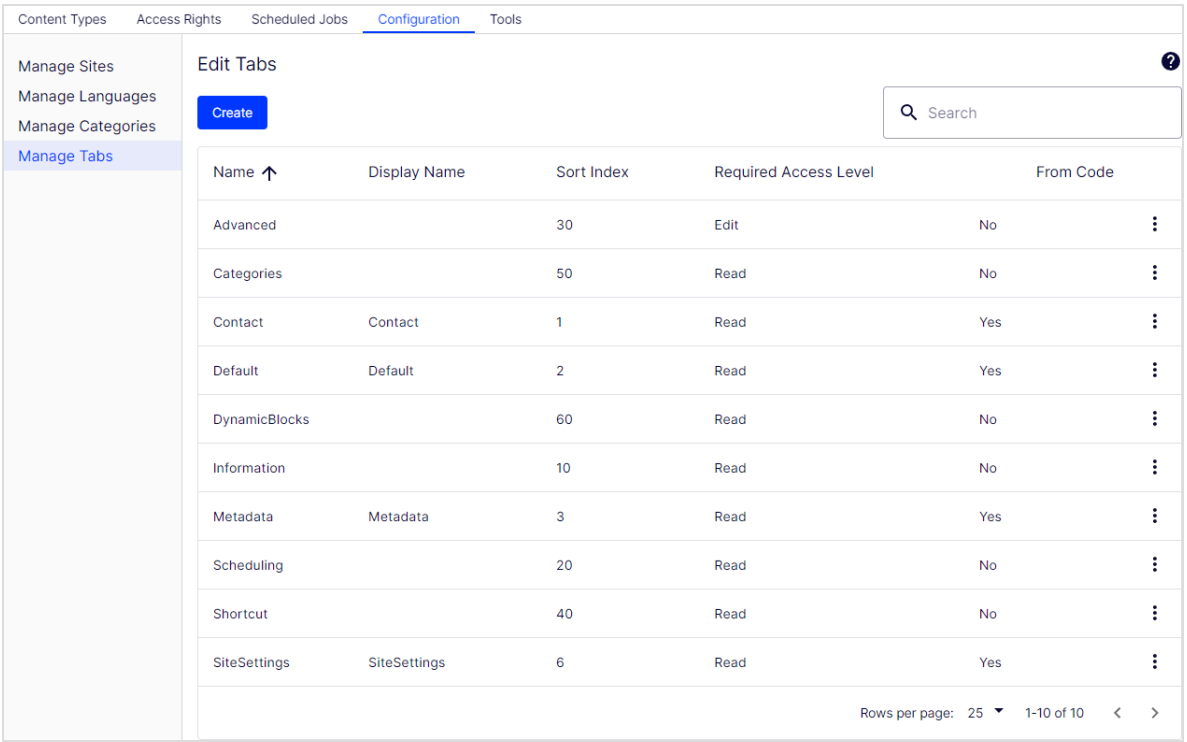
Editing tabs

Tabs

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



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Adding and editing a tab

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1. Go to **Admin > Configuration > Manage Tabs**.

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2. Click **Create** to create a new tab. Select **Edit** form the tab's menu to edit a tab.

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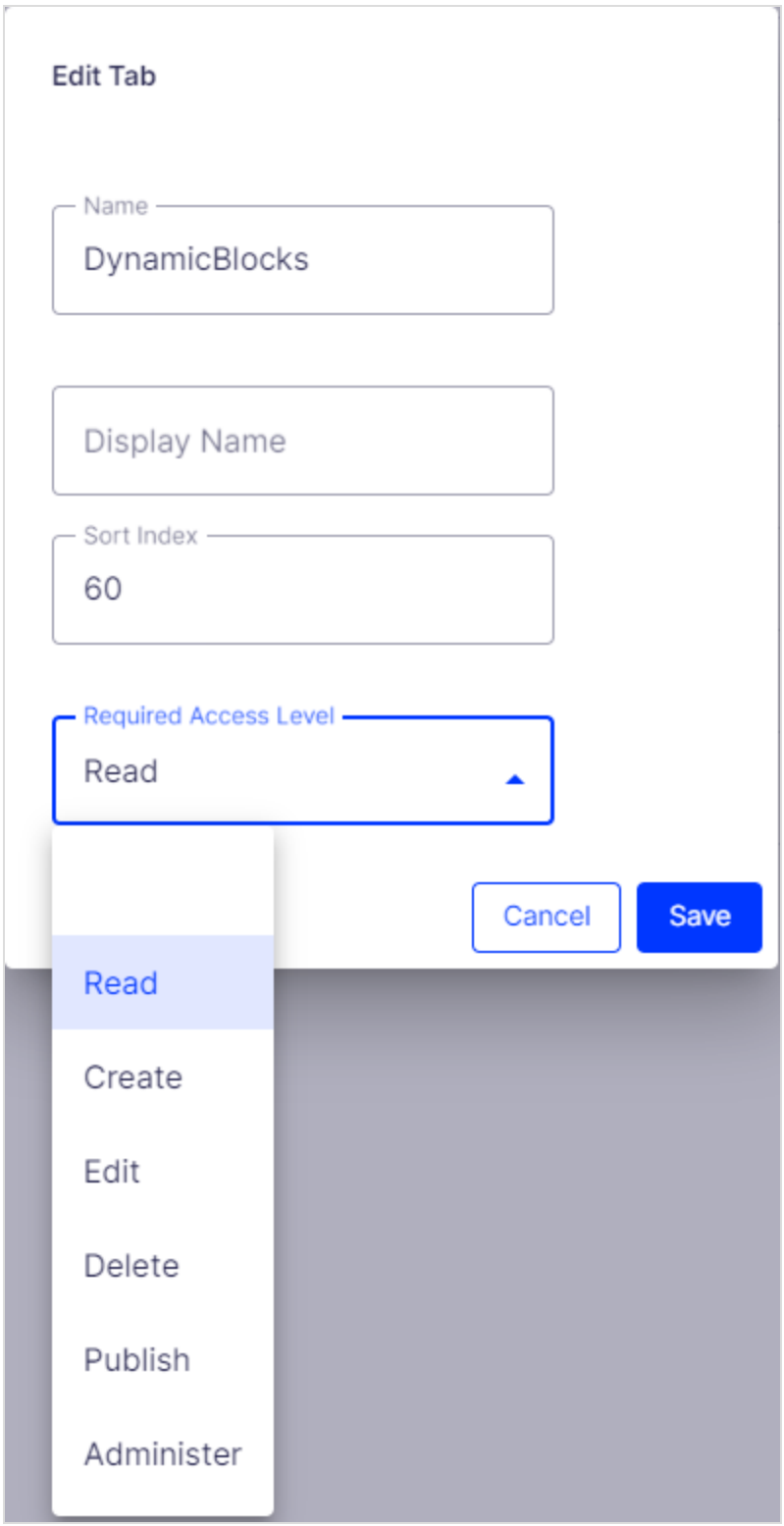

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a. In **Name**, name the tab.
b. In **Display Name**, enter how the tab name is displayed.
c. In **Sort Index**, specify the index amount for the tab. The lower the value, the further to the left the tab is placed.
d. In **Requires Access Level**, you can select which access level applies for an editor to see the tab. It is linked to the editor's access level for the page.

3. Click **Save**.

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Properties

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

Property types

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

The following types of properties are used:

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

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

Editing and adding properties on content types

You normally define properties in code but occasionally add them in admin view, because properties added from there are not rendered.

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

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

Editing a property

The upper **General** section of the **Common Settings** tab contains information about a selected property. If a property is **defined in code**, information about it appears, but you cannot change values such as property type and presentation control. You can change other settings, such as making a property mandatory or searchable. The lower **User Interface** part contains settings related to the property display in edit view.

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

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Adding a property

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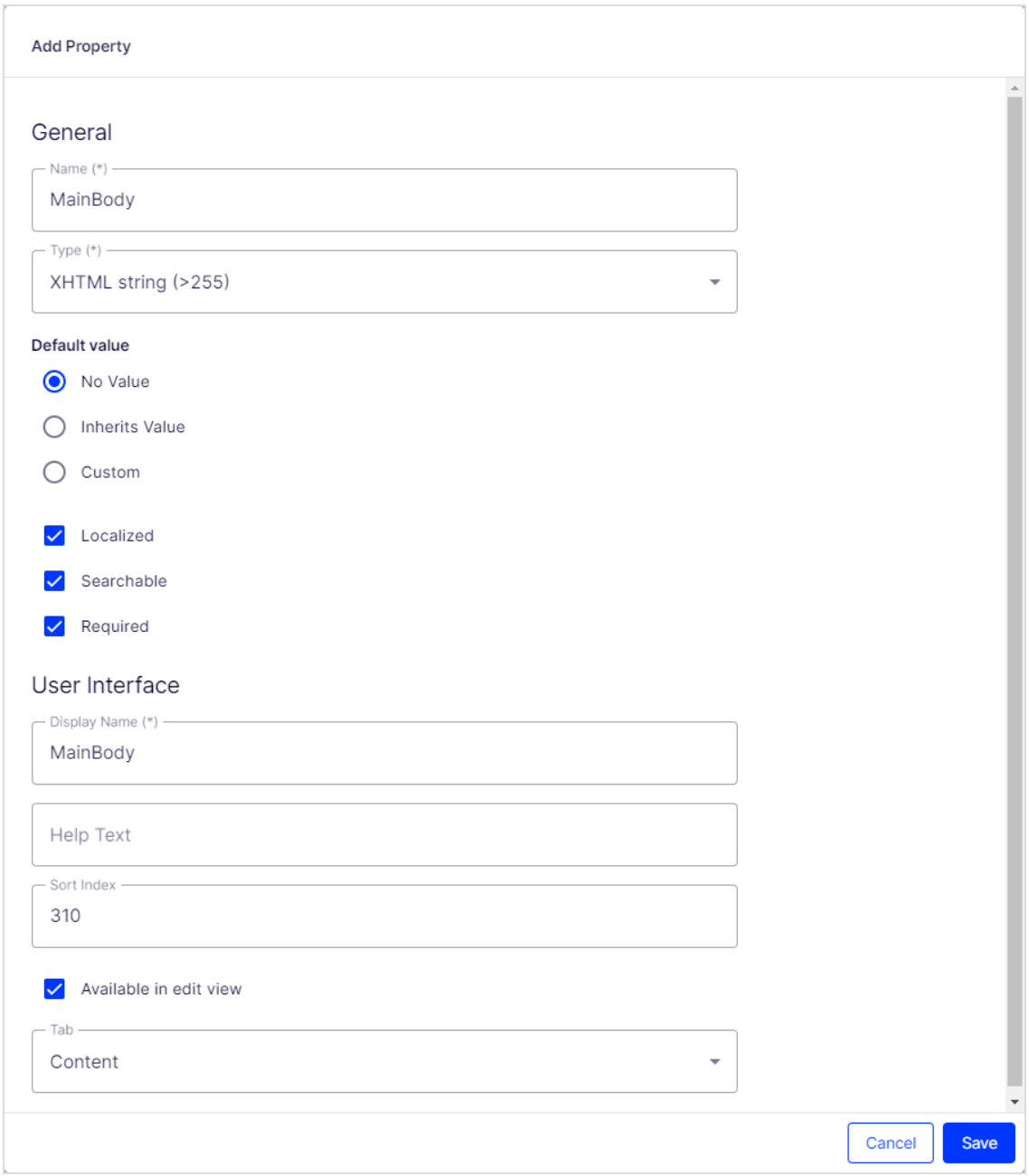
1. In admin view, from the **Content Type** tab, select a page type and click **Add Property**.
2. Fill in the fields.



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Field	Description
Name	Name the property. This is used when programming and making language settings.
Type	Select a property type. You can choose from several property types: integer, string, page, date, and so on. You can also create a property type.
Default value	Select a value for the property. **No value**, **Inherits value**, or **Custom** properties.
Localized	Select whether the property is unique for a certain language. This is needed only if the website supports globalization.
Searchable	Clear the check box to exclude a property from search. It might be beneficial to avoid undesired property values the search index. By default, all properties are searchable.
Required	Select the check box to make it mandatory to enter a value for the property before saving. The setting is configured per property and content type.
Display name	Specify a heading for the property. This text appears for the editor when editing the page in All properties editing view unless a translation of it was added language resources.
Help text	Specify a help text to help the editor understand how to use this property, and appears in All properties editing view when hovering over the property name.
Sort index	Select a relative number to sort this property among other properties.
Available in edit view	Determine if the property is visible in edit view. By default, all properties are visible in the editorial interface. The setting is configured per property and page type.
Tab	Select the tab on which the property is to be displayed in the **Tab** drop-

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Field	Description
	down list.

3. Click **Save**.

The **Custom Settings** tab displays custom information for the selected property type.

Defining language-specific properties

When working with globalization, you define in every template which fields vary depending upon the language. To do this, set the property for that field to "locked" or "open" for globalization using the **Unique value per language** setting in admin view.

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

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

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

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> permanently deleted.

Setting a property to be language-specific

1. On the **Content Types** tab, select the page type that contains the property to be set.
2. Click the name of the property that you want to change.
3. Select the **Localized** option.
4. Click **Save**.

Placing a property on a tab

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

Configuring customized property settings

You can configure custom property types.

Priorities and configuration

The property settings have the following priority:

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

You can create a property, name it, and give it a data type and other settings.

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Creating custom property types

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

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

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

Data type name	Base type	Description
Boolean	Selected/not selected	True or false.
Number	Integer	An integer.
FloatNumber	Floating point number	Number with decimals, for example, 3.14.
PageType	Page Type	Optimizely CMS page type defined in admin view.
PageReference	Page	Link to an Optimizely page in the current site.
Date	Date/Time	Date and time.
String	String (<=255)	Short text, fewer than 256 characters in length.
LongString	Long String (>255)	Used for text that can exceed 255 characters in length, for example the main editor area in edit view.

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Data type name	Base type	Description
Category	Category selection	List of categories.
LinkCollection	Link collection	A collection of links that can be added and edited in edit view.

Note: Default values for properties are not defined in code.

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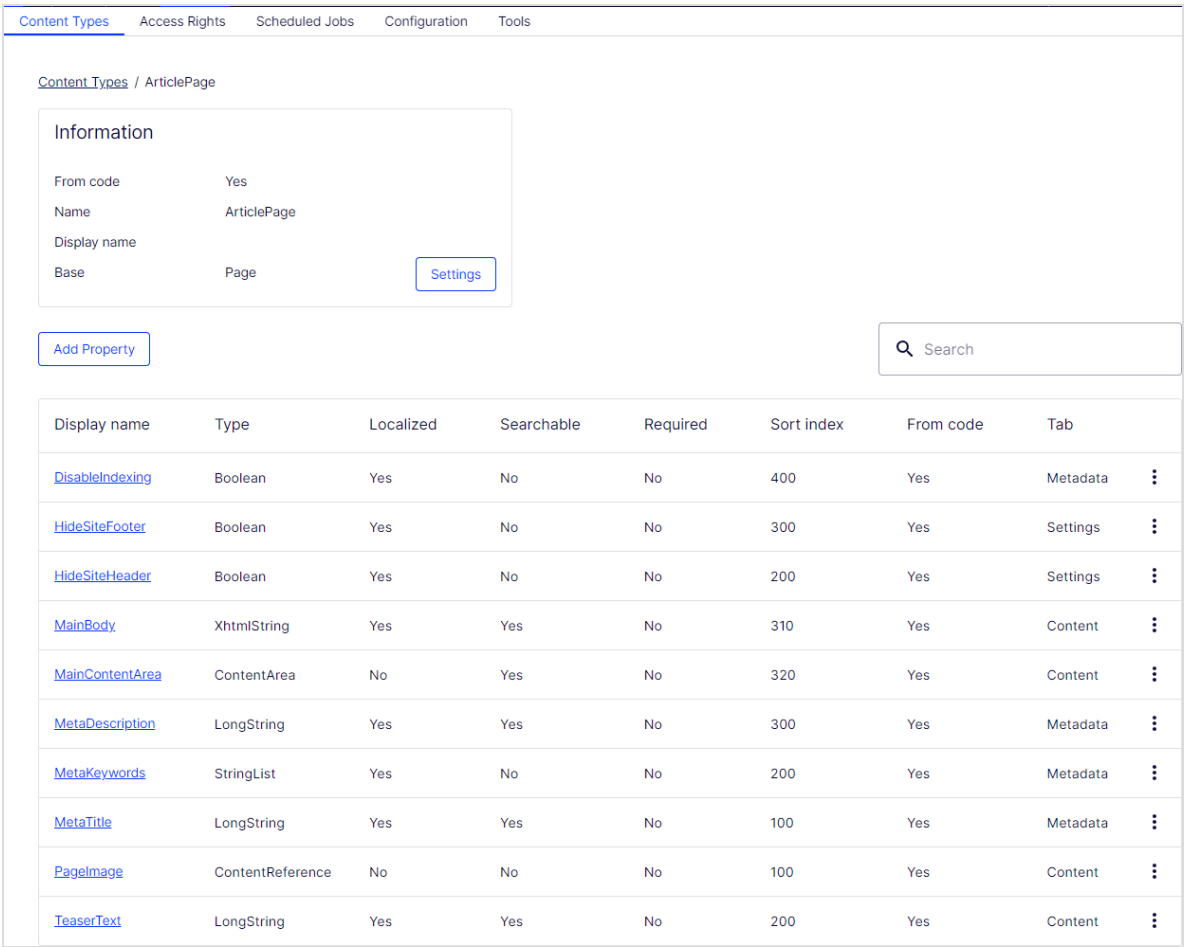
Content types

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

Content types and properties

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



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

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

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

- You can define page types in code or from the admin view. However, you can define block types only in code.
- For page types defined in code and for all block types, you can define "non-breaking changes" of properties in admin view.
- You are notified if you cannot change the settings defined in code in admin view.
- If you make changes to a page type defined in code, you can reset the changes to the original values defined in code.

Page types

> **Warning:** Changing page type settings may cause the website to stop working. Although you can create page types in admin view, you should create them from code.

Editing a page type

To edit settings for an existing page type:

1. Go to **Admin > Content Types**.
2. Select the page type from the list.
3. Click **Settings**.

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4. Modify the form.
5. Click **Save**.

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

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

Using the Access level area, you can define which users or user groups will have access to the page type.

Video tutorial: Making a page type available for some users but not for others (3:06 minutes)

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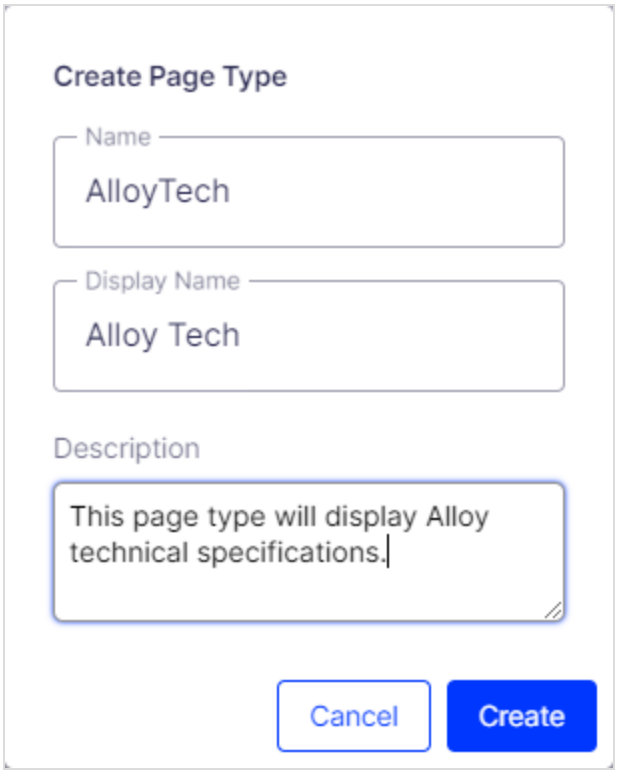
Creating a page type from admin view

1. Go to **Admin > Content Types**, and click **Create New Page Type**.



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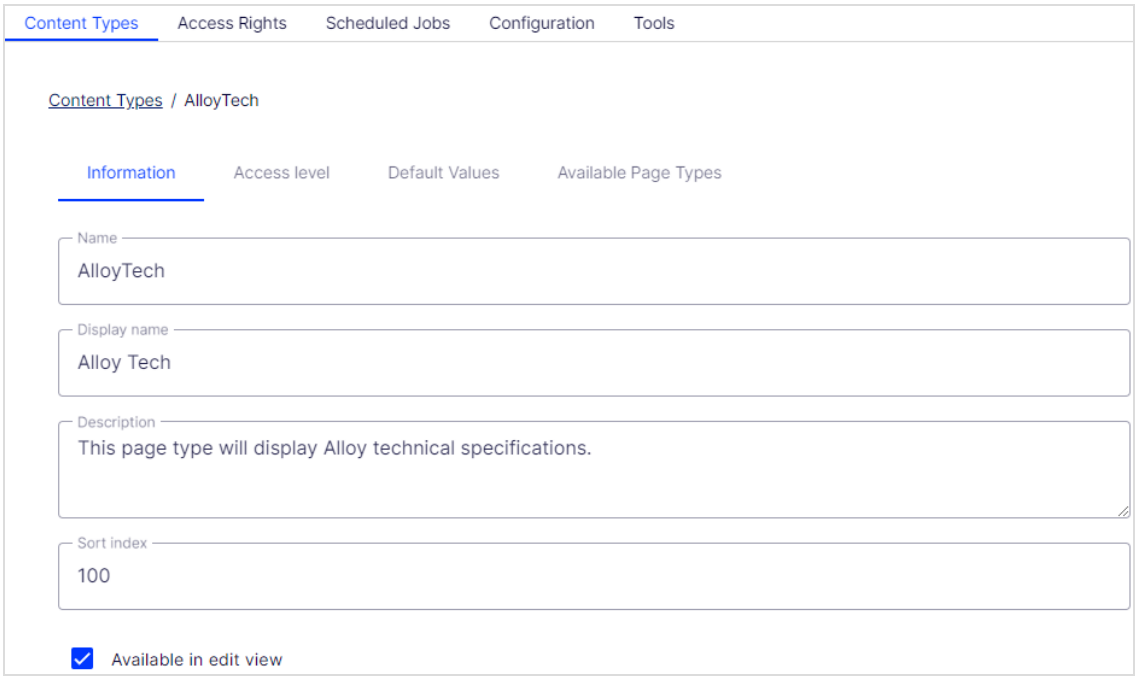
2. Set values in the **Information** tab.



Field	Description
Name	Enter the name of the page type.
Display name	Enter the name to be displayed in the list of available page types.
Description	The text describing the page type, appears in the list of available page types.
Sort index	Determines the sorting (ascending sort order) in the list of available page types in edit view; default is 100.
Available in edit view	Makes the page type available for selection when creating new pages in the editorial interface. You should hide page types that are rarely used by editors, such as the start page type. You can make these available when needed, and then hide them again.

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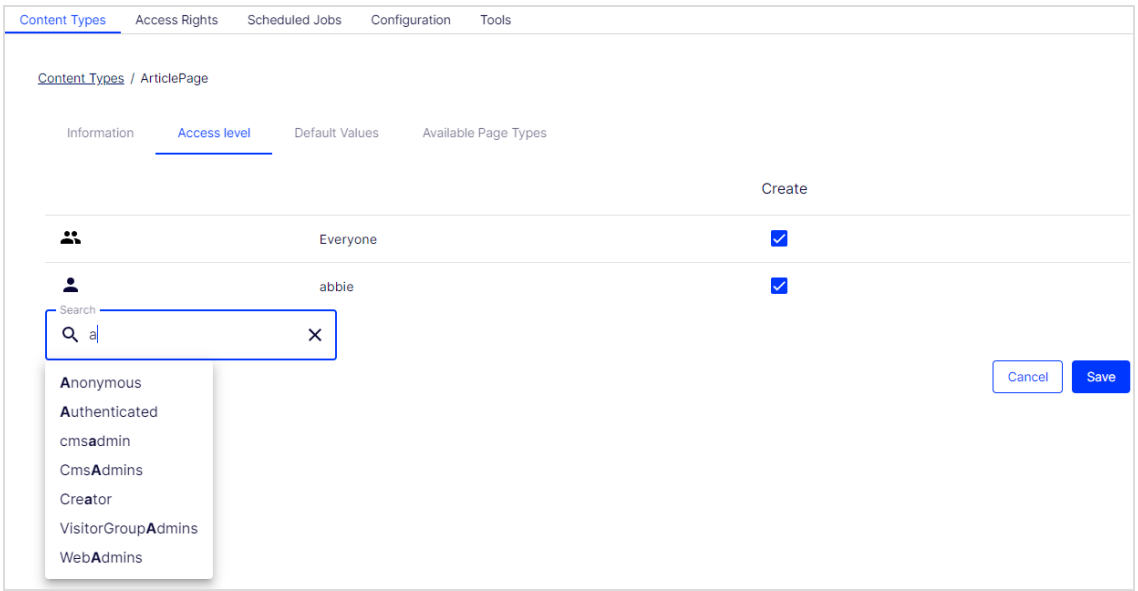
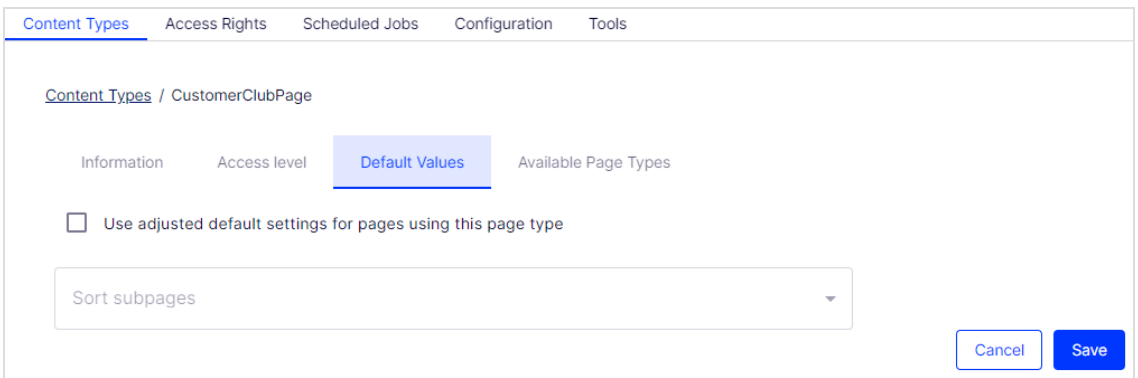
3. Set the values on the **Access level** tab.

   You can use the **Search** box to filter and find users and groups you want to give access to.



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

   You can set default values for some of the built-in properties in Optimizely CMS from admin view. You can also specify default values for the properties from code, but these are not visible in the admin view.



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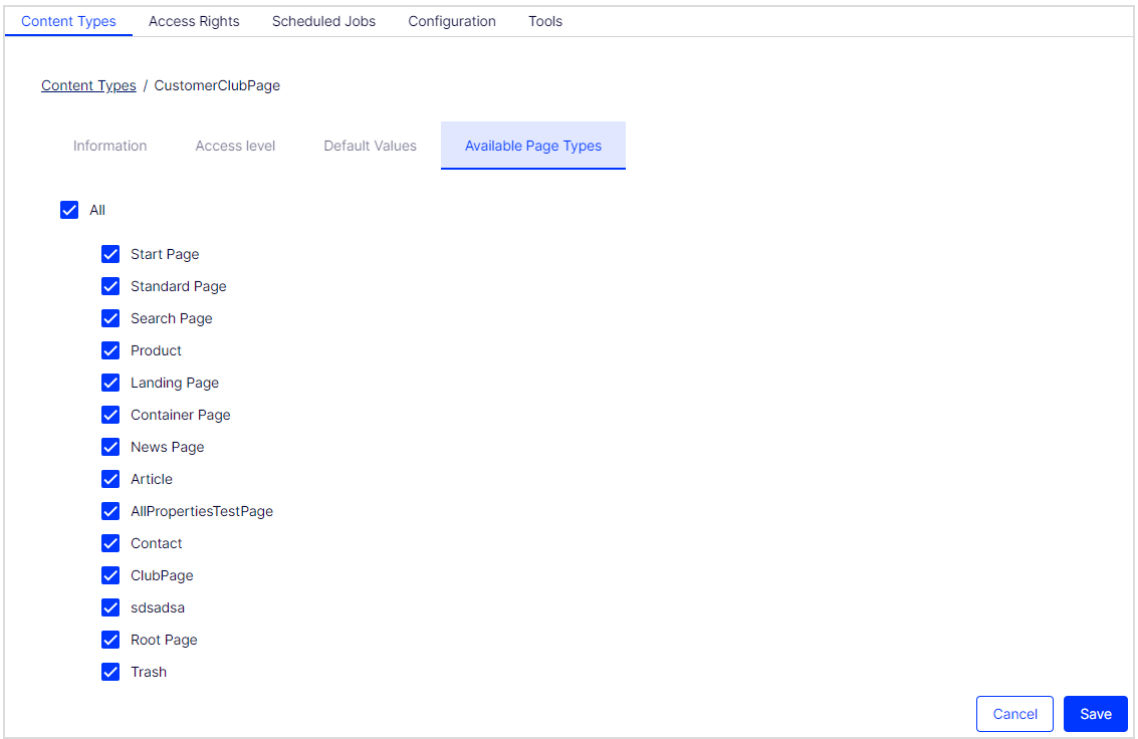
5. Set values on the **Available Page Types** tab.

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



6. Click **Save**.

Copying an existing page type

When you copy a page type, its properties are copied also. You can then edit the information for the page type and its properties. Copy a page type as follows:

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

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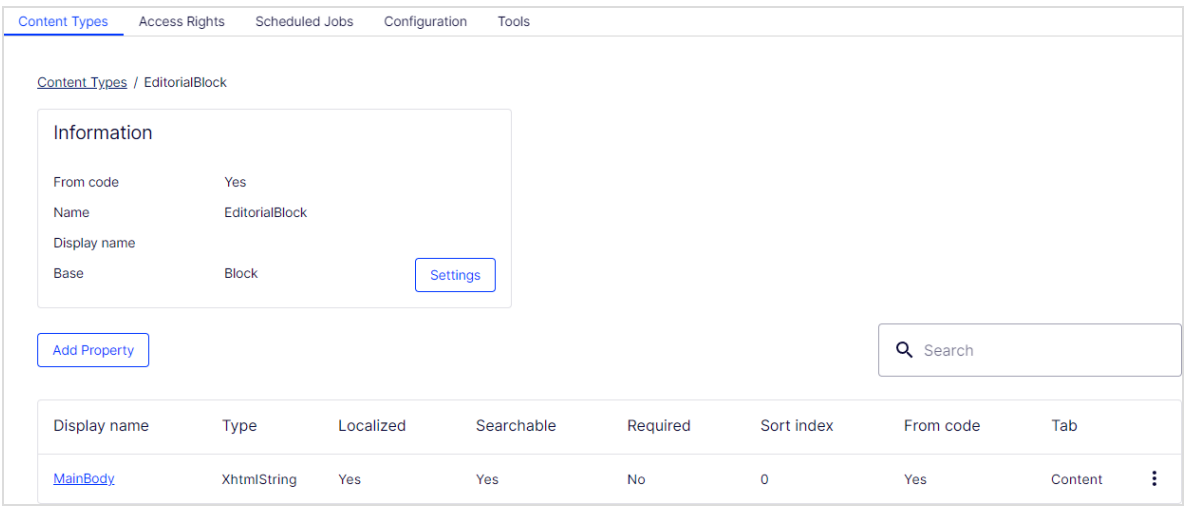
> **Note:** Copied page types are untyped and you need to add the path to the display template, otherwise pages based on the page type will not have a preview.

Block types

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



Edit the settings for an existing block type as follows:

1. Select the block type on the **Block Type** tab and click **Settings**.
2. Change one or several of the settings as described for Creating a page type from admin view.
3. Click **Save**.

Other content types

By default, there are generic content types for other types of content such as folders and media files. Based on these, developers can create specific content types. You can have a

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specific folder or media file content type, where you can add properties such as *Copyright* or *Photographer*.

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Managing visitor groups

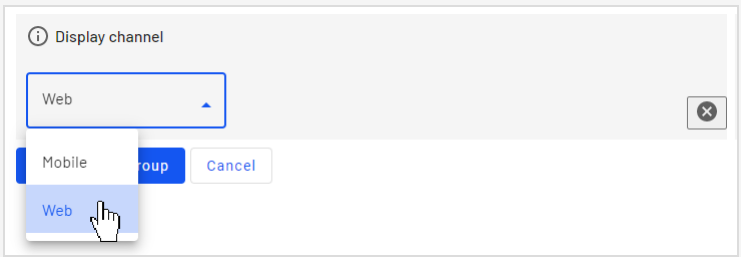
Personalization in Optimizely lets you target website content to selected visitor groups. The personalization feature is based on customized visitor groups that you create based on a set of **personalization criteria**. Optimizely provides a set of basic criteria such as geographic location, number of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

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

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

Built-in visitor group criteria

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

Visitor group criteria	Description
Technical Criteria	• **Display Channel** matches the visitor's current display channel when visiting the website, that is, it distinguishes between web and mobile visitors. From the **Technical Criteria** category, add the **Display Channel** criterion, and select **Mobile** or **Web** channel.  • **IP Range** matches an exact IP address or an IP range that is **equal to or above**, or **equal to and below** a defined IP number, used by the visitor when visiting the website.

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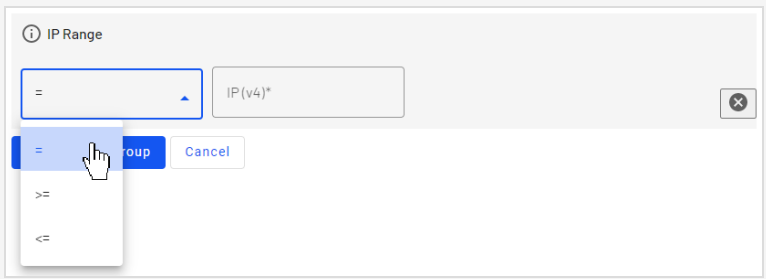
Visitor group criteria	Description
	◦ **Equal to**. To match with an exact IP address, select the equal sign (**=**) and enter the exact IP address:  ◦ **Equal to or above** (**>=**). If you use the 'greater than or equal to' sign (**>=**), the visitor's IP address and the specified IP address are both converted into integers and compared. If the integer from the visitor's IP address is the same as or **higher** than the integer of the specified address, the visitor group criteria is considered met and the visitor is part of the visitor group. ◦ **Equal to or below** (**<=**). If you use the 'less than or equal to' sign (**<=**), the visitor's IP address and the specified IP address are both converted into integers and compared. If the integer from the visitor's IP address is the same as or **lower** than the integer of the specified address, the visitor group criteria is considered met and the visitor is part of the visitor group. • **Role** matches the visitor's access role when visiting the website. You can include roles by using the **In Role** condition and exclude roles by using the **Not in role** condition.
URL Criteria	• **Download File** matches a specific file which is considered already been viewed or loaded by browsers. The file path can be the file name only or a relative path to a file. If the path to a loaded image contains the configured path, the visitor group criterion is considered met. You

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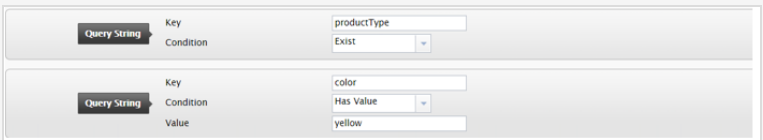
Visitor group criteria	Description

	can use this criterion to, for example, check if the image *CompanyLogo.png* has been viewed by entering the path to the image:
	
	• **Query string** matches the request to see if it contains a query string key with the specified value. Conditions can be:
	  ◦ **Exist**. Checks only if the key exists in query string.
	  ◦ **Has Value**. Checks both the key and the value represented in URL's query string.
	  When the **Exist** condition is selected, the **Value** text box is disabled.
	 
	• **Referrer**. Matches the Host name or URL of the referred page that was clicked before entering the site, such as a search engine result page. You can decide if the referrer criteria matches on equal, contain, start with, or end with a specified value for the whole or parts of the Host name or URL. See Example: Referrer.
	• **Search Keyword**. Stores the URL of the referred page that was clicked before entering the site, such as the URL of a search engine result page. Your partner developer can define this criteria to specify the search word to match against the URL by a regular expression. The regular expression finds search words in the URL.
	  Note: This criterion is not compatible with Google due to privacy restrictions for Google searches.
	• **Landing URL**. Matches the URL with which the visitor enters the site. You can decide if the landing URL is equal, starts with, or ends with the with a specified value. For example, *contains www.example* to match

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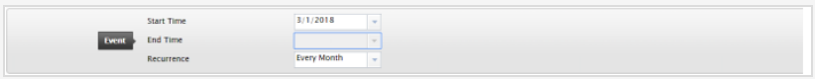
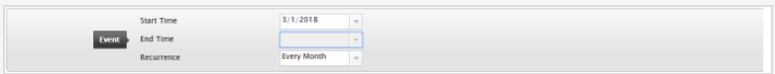
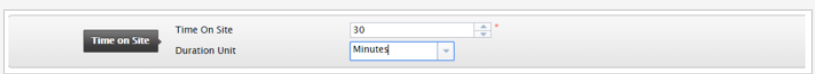
Visitor group criteria	Description
	www.example.com, *www.exampleURL.com* and so on.
Time and Place Criteria	• **Event** matches a set time period. For example, you can configure this visitor group criterion for sale events which occurs the first day of every month by selecting the **Every Month** recurrence.  ◦ Recurrence can be: ▪ **Every Month**. Occurs at a specific day in every month, with start from the set **Start Time**. ▪ **Every Year**. Occurs once a year at a specific day, with start from the set **Start Time**. ▪ **Never**. Not in the time period specified between **Start Time** and **End Time**. ▪ If **Every Month** or **Every Year** recurrence type is selected, **End Time** is disabled. For example, you can configure this visitor group criterion for sale events which occurs the first day of every month by selecting the **Every Month** recurrence.  • **Time On Site** matches the total length of time of a user's visit since the session start. If the total length of time is greater than or equal to the configured time, then the visitor group criterion is considered met. ◦ **Duration Unit**. The duration time can be **Seconds**, **Minutes** or **Hours**. ◦ **Time On Site**. The value range is from 0 to 60.  • **Time Period** matches the time and date of the visit. If it is within the specified time period, the visitor group criterion is considered met. From

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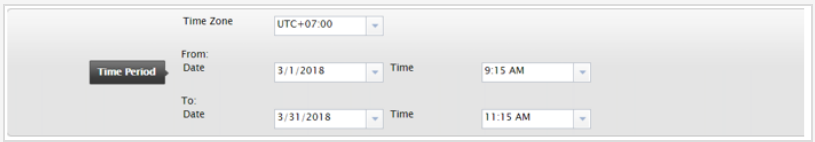
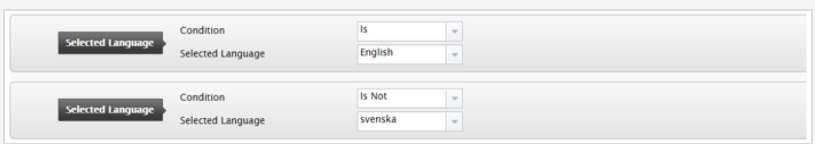
Visitor group criteria	Description
	the **Time and Place Criteria** category, drag and drop the **Time Period** criterion.  • Geographic Coordinate. Uses the visitor's approximate location in a geolocation database (based on visitor IP address). Drag the marker to the map (Google maps), and select a radius around that point to indicate the visitor's proximity to the location. See Example: Geographic coordinate. • Geographic Location. Matches the visitor to a specific continent, country, and region. For example, *Continent: Europe, Country: Norway, Region: Oslo*. You can also specify a wildcard for country and region. For example, **Country N*** in Europe yields Netherlands and Norway. See Example: Geographic location. • Time of Day. Matches the visitor's time period with the start time, end time (15-minute intervals), and days you specify. For example, *From 2:00 PM to 4:15 PM on Monday, Tuesday, and Friday.* For more information on how Geographic coordinate and Geographic location are manually enabled, see Enabling a Geolocation provider in Configuring personalization on Optimizely World.
Site Criteria	• **Selected Language** checks which language the visitor is viewing a page in when using fallbacks. For example, check if the visitor views a page in English by selecting the **In** condition, or not in Svenska language by selecting the **Is Not** condition. Languages which are defined and enabled are available in the list.  • Number of Visits. Matches the number of times the visitor has visited the website. You can specify Less than, Equal, or More than, within a

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Visitor group criteria	Description
	number of days (weeks, months or years), or since a date, or in total. For example, *Less than 1 [visit] within 10 days*. • Visited Category. Select one of the website's page categories. You can also select a number of pages that use the category and were visited. The visitor must have visited the specified number of pages to which the category is applied. For example, *Category X viewed at least 3 pages out of a total of 6*. • Visited Page. Select a site page. If the visitor have visited that page during the current session, the criteria is considered met.
Visitor Groups	**Visitor Group Membership**. Select members from existing visitor groups. For example, *Member of Job Applicants*, or *Not a Member of Start Customer Club*.
Optimizely Forms (Optimizely Forms is an add-on and must be installed separately.)	• **Submitted Form**. Matches when a visitor submits (or does not submit) a particular form that you select from a drop-down list. For example, *Has Submitted Job Application*. See Example: Form and form values. • **Submitted Form Value**. Matches when a visitor submit a particular form value. See Example: Form and form values. **Note:** The Optimizely Forms Samples package must be installed for the forms visitor group criteria to work. See Optimizely Forms Samples package for information.

Managing visitor groups

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

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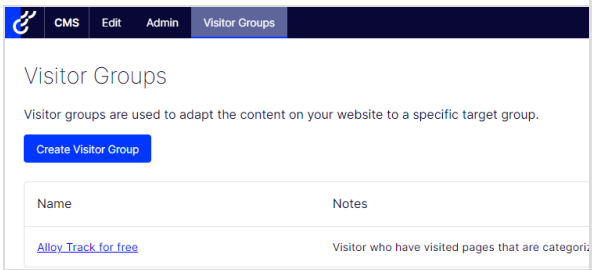
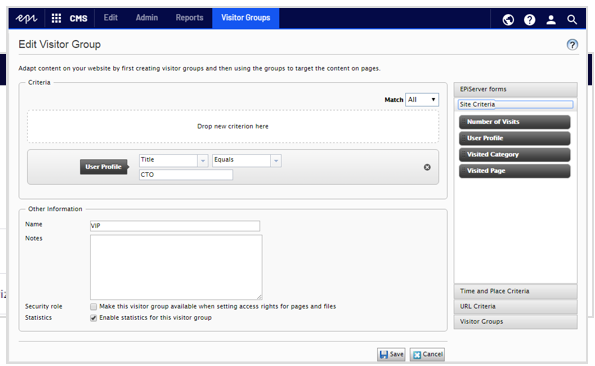
> **Note:** You can make the editor a member of **VisitorGroupAdmins**. This group provides access only to the **Visitor Groups** option in the top menu.

From CMS 12, this user interface has changed noticeably. To see documentation for CMS 11 and lower, please refer to an older version of this user guide, for example version 21-2.

CMS 12 and later:



CMS 11 and lower



Creating a visitor group

1. From the top menu, select **CMS** > **Visitor Groups**.
2. Click **Create Visitor Group**. The **Create Visitor Group** view appears.
3. Give the visitor group a unique name to separate it from other visitor groups.
4. In **Name**, name the visitor group you are creating. This name appears in the personalized content box when you select the content on a page.
5. In **Notes**, type a descriptive text about the visitor group you have created, for example, its purpose. This description appears as a tooltip when the editor is adding a visitor group to the content on a page.
6. Select the **Enable statistics for this visitor group** check box to enable statistics for the visitor group (this check box is selected by default). When enabled, you can use the Visitor Group Statistics gadget to see statistics from this visitor group, see Viewing and clearing statistics.
7. Select the **Make this visitor group available when setting access rights for pages and files** check box if you want this visitor group to be available when setting access

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rights for pages and files in admin view.

> **Note:** Visitor groups only have read access.

8. Click **Add criteria** to see a drop-down menu with available criteria.
9. From the drop-down menu, select a criteria and adjust its settings as necessary. Add more than one criteria if needed. See examples described in Examples of creating visitor groups.
10. In the **Match** drop-down list, select one of the following.
    - **All**. Select this if you want all criteria to be met for a visitor to be included in the visitor group.
    - **Any**. Select this if it is enough that only one of the criteria is met for a visitor to be included in the visitor group.
    - **Points**. Use points if you want to set that some criteria are more important that others.
11. Click **Save Visitor Group**.

Editing a visitor group

1. Select **Visitor Groups** from the top menu.
2. Click the name of the visitor group you want to change.
3. Add a new criterion for the visitor group, change the value for an existing criterion, or click to delete an existing criterion.

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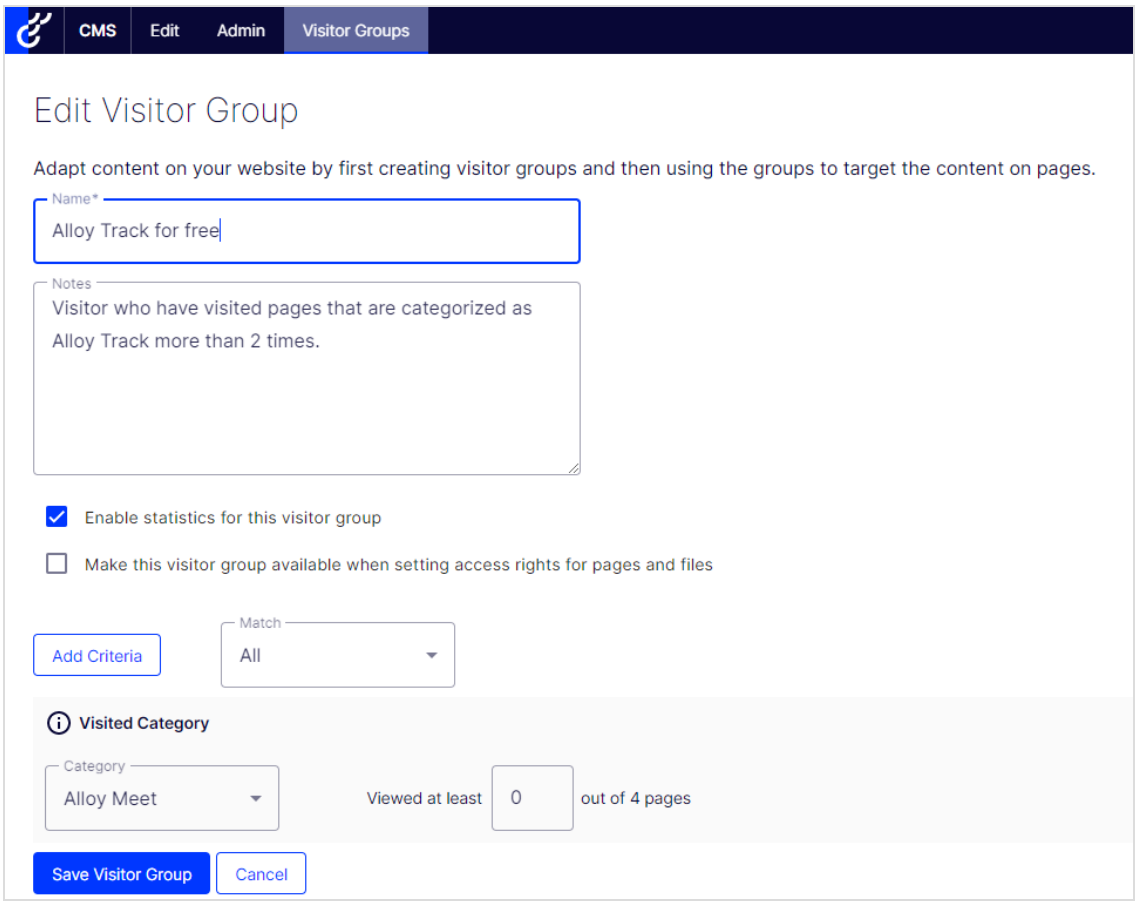

4. Click **Save Visitor Group**.

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

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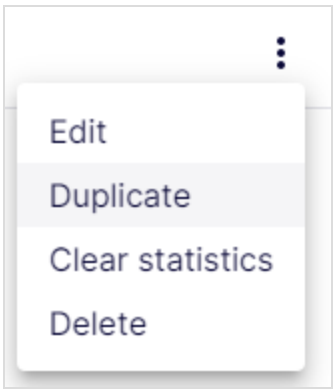
Copying a visitor group

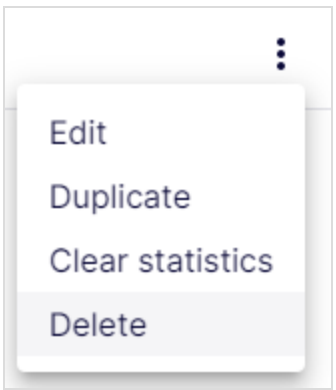
1. Select **Visitor Groups** from the top menu.
2. Click the context menu on the visitor group you want to copy and click **Duplicate**.



3. Confirm the copy action. The new copy has the same name as the original but with the extension - *Copy*.
4. Rename and change criteria for the new visitor group you have copied.

Deleting a visitor group

1. From the top menu, select **CMS** > **Visitor Groups**.
2. Click the context menu on the visitor group you want to delete and click **Delete**.



3. Confirm the deletion.

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Using a visitor group to personalize content

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

Examples of creating visitor groups

- Site criteria and points
- Geographic location
- Geographic coordinate
- Referrer
- Form and form values

Site criteria and points

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

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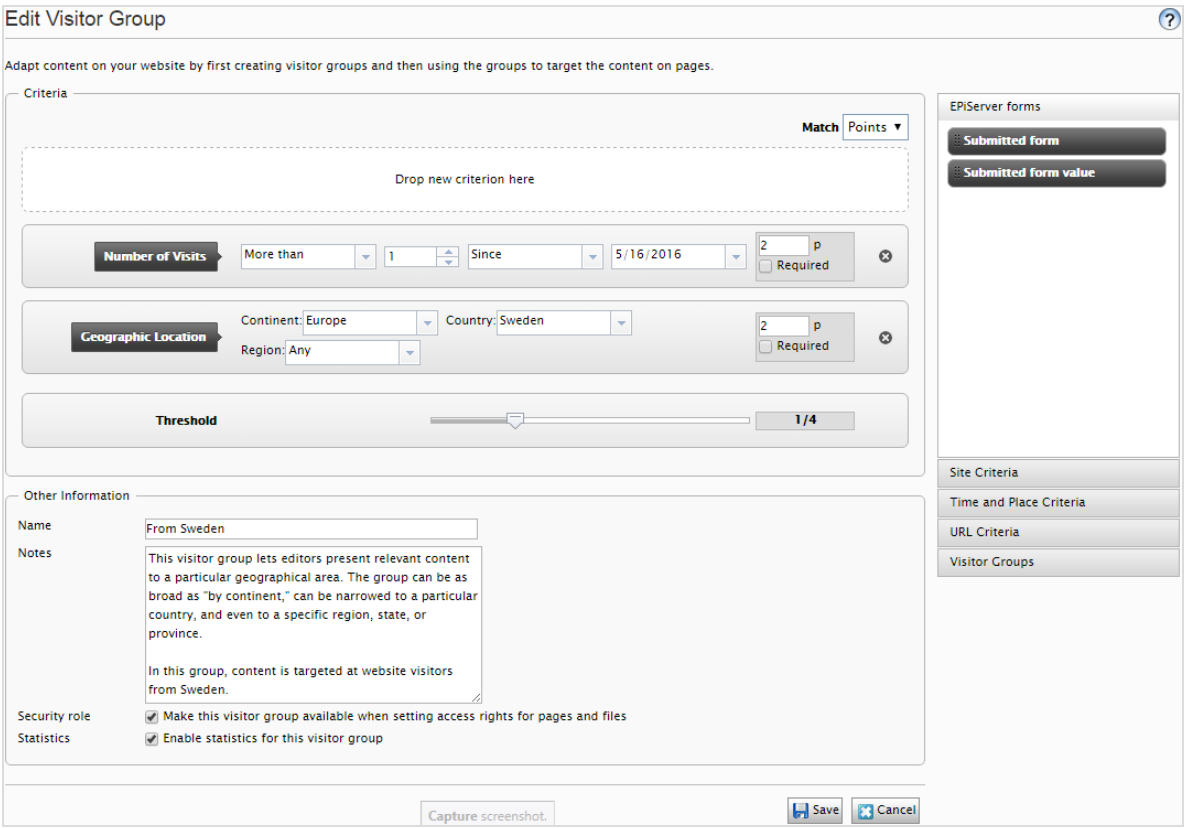
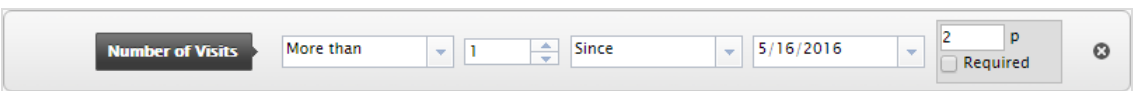


1. In the **Match** drop-down list, select the criteria to match **Point**.
2. Drag and drop the **Visited Page** criterion, and select page. Drag and drop the criteria again to add several pages.
3. Drag and drop the **Number of Visits** criterion, and select **More than** > **1** > **Since [date]**.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



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

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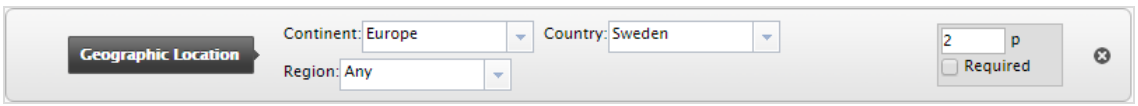
Geographic location

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

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

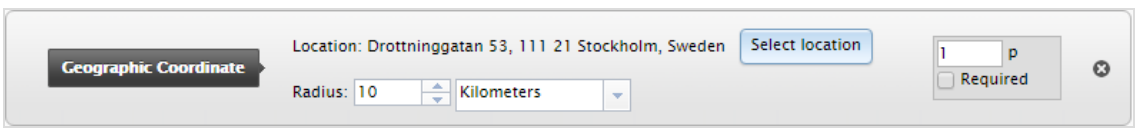


2. Drag and drop the **Time of Day** criteria, and select **[weekday]**. You can also select the personalization to start and end at a specific time.
3. Click **Save**.

Geographic coordinate

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

1. Drag and drop the **Geographic Coordinate** criteria, and click **Select Location**.
2. Click **Select location** to display a map that you click to set a location. You can zoom in the map for more precise locations.
3. Select the **Radius [number of kilometers or miles]**.



4. Click **Save**.

Referrer

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

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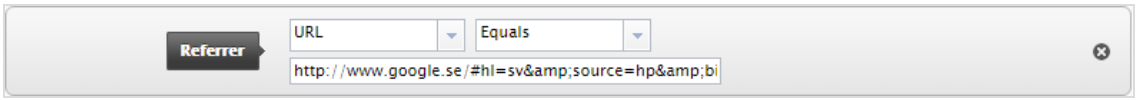
- search for *optimizely and cms* on Google.com
- from the search result page, click the Optimizely landing page link

1. Drag and drop the **Referrer** criteria, and select **URL** > **Equals** > the URL of the search engine result page, for example, https://www.-google.se/#hl=sv&source=hp&biw=1338&bih=790&q=optimizely+cms.



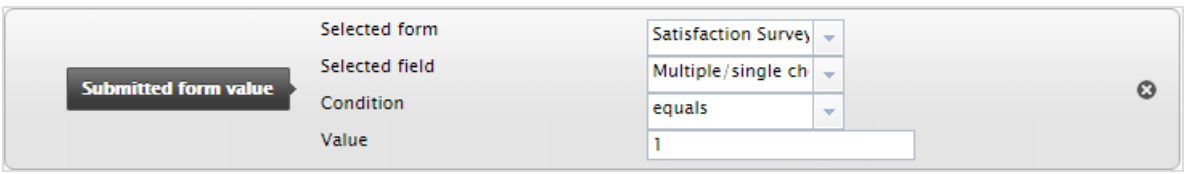
2. You can also add the **Geographic Location** to select a country.
3. Click **Save**.

Form and form values

> **Note:** Optimizely Forms and the Optimizely Forms Samples package must be installed for the forms visitor group criteria to work.

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

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



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Additional visitor group criteria

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

Optimizely Commerce criteria

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

Optimizely Marketing Automation

Visitor group criteria specifically designed for marketing automation.

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Index

A

access rights
- administer 29
- change 28
- create 28
- delete 28
- languages 41
- overview 28
- publish 29
- read 28
- visitor groups 40

administration view 26

administrators
- role 16

approval sequences
- managing 70

archive function, job 47

assets
- remove unrelated content 50

B

BLOBs
- abandoned, remove job 50

block types 109

C

categories
- adding 83
- deleting 85
- editing 85
- overview 83

change log 56
- auto truncate job 47

community member role 14

content
- editor role 15
- publishing
  - delayed job 49
- types 102

content approvals
- deleting 70
- editing 70
- setting up 70

customer role 14

D

developer role 16

E

exporting
- CMS data 52

I

importing
- CMS data 53

J

jobs, scheduled, CMS 45

L

languages
- access rights 41
- adding 65
- deleting 69
- editing 65
- enabling 65
- overview 64

licenses available per website 59

login 24

M

marketer role 15

menu, top 24

merchandiser role 15

multi-site 58

N

notifications

dispatcher, scheduled job 49

truncate message, scheduled job 49

P

page types

overview 103

permissions

see access rights 28

personalization

overview 111

properties

adding 95

builtin 93

custom settings 98

custom types, creating 100

custom, configuring 99

editing 93

language specific 98

overview 93

types 93

user-defined 93

R

recipient

role 14

roles 14

administrator 16

community member 14

content editor 15

developer 16

marketer 15

merchandiser 15

recipient 14

visitor, customer 14

website owner 15

S

scheduled jobs

A/B test 49

archive function 47

change log auto truncate 47

clear thumbnail properties 48

fetch data from MAI connector 48

link validation 48

monitored tasks auto truncate 49

notification dispatcher 49

notification message truncate 49

overview 45

publish delayed content 49

remove abandoned BLOBs 50

remove permanent editing 50

remove unrelated content assets 50

running manually 45

setting up automatic intervals 45

subscriptions 50

trash, empty 47

subscriptions

job 50

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T

tabs

overview 86

thumbnail properties, clear, job 48

top menu 24

trash

emptying on a schedule 47

U

user groups

creating in CMS 44

deleting in CMS 44

displaying members 43

overview 41

users

creating 42

deleting 42

editing 42

overview 41

V

video

Making a page type available for some users 104

Managing access rights 28

visitor groups

access rights 40

copying 120

creating 117

criteria, built-in 111

deleting 120

editing 118

examples 121

overview 111

visitor role 14

W

websites

adding 59

available licenses 59

domain mapping 59

managing 58

multi-site setup 58

owner role 15

requirements 59

single-site setup 58

unique URL 59

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Optimizely Digital Experience Platform

The Optimizely Digital Experience Platform unifies digital content, commerce and marketing in one platform, including omnichannel solutions for intelligent campaigns. The platform uses artificial intelligence and behavioral analytics to deliver personalized experiences everywhere. With our secure, reliable platform you can quickly increase engagement, revenue and productivity, while getting the fastest time to value.

About Optimizely

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

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