

# EPiSERVER CMO

Release 1.0



## User's Guide

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# EPiSERVER

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## About EPiServer CMO

EPiServer CMO is a tool that allows you to receive an instant answer on how your campaigns are performing and which landing pages deliver the best results. You don't need any technical skills and can easily test and analyze the results yourself.

### Measure and optimize your online campaigns and pages

Any marketer knows that one of the pillars for a marketing initiative to be worthy of being called a campaign is that the results can be tested and measured. Preferably the campaign can be adapted in real time to ensure that the desired return of investment is achieved. Most marketers would also agree that testing and monitoring campaigns are often too complex and too hard to fit into their daily marketing workflow. With EPiServer Campaign Monitor and Optimization (CMO) you can easily measure and monitor online campaigns and optimize your landing pages.



## To Access EPiServer CMO

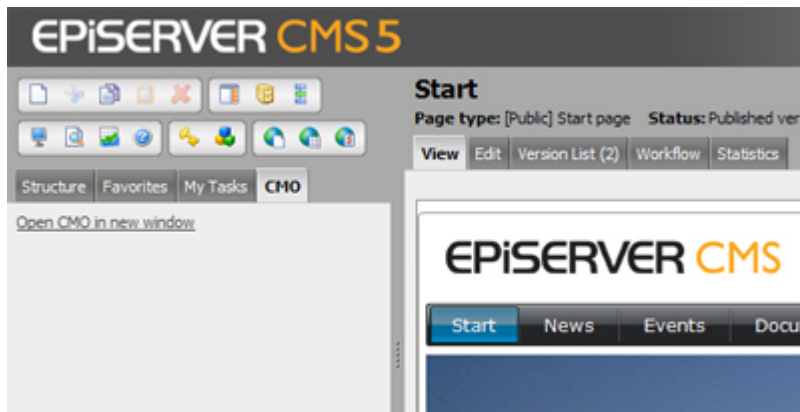
There are two ways of reaching EPiServer CMO.

### From Edit Mode in EPiServer CMS

Log in to Edit Mode of your website and click **Open CMO in new window** in the **CMO** tab. EPiServer CMO will open in a separate browser window. Use your regular EPiServer CMS login to access EPiServer CMO.

### Directly from the URL

Enter the domain address of the website in the URL in the web browser and complement the domain address with /cmo. Press **Enter** and EPiServer CMO will open in a separate browser window. Use your regular EPiServer CMS login to access EPiServer CMO.



## Access Rights in EPiServer CMO

There are two roles in EPiServer CMO, CMO User and CMO Admin, based on the access rights groups in EPiServer CMS. Users and administrators are dedicated access rights depending on their roles when working with EPiServer CMO. For further information about the groups WebAdmins and WebEditors, refer to the Administrator's Manual for EPiServer CMS.

### Access Rights in LPO

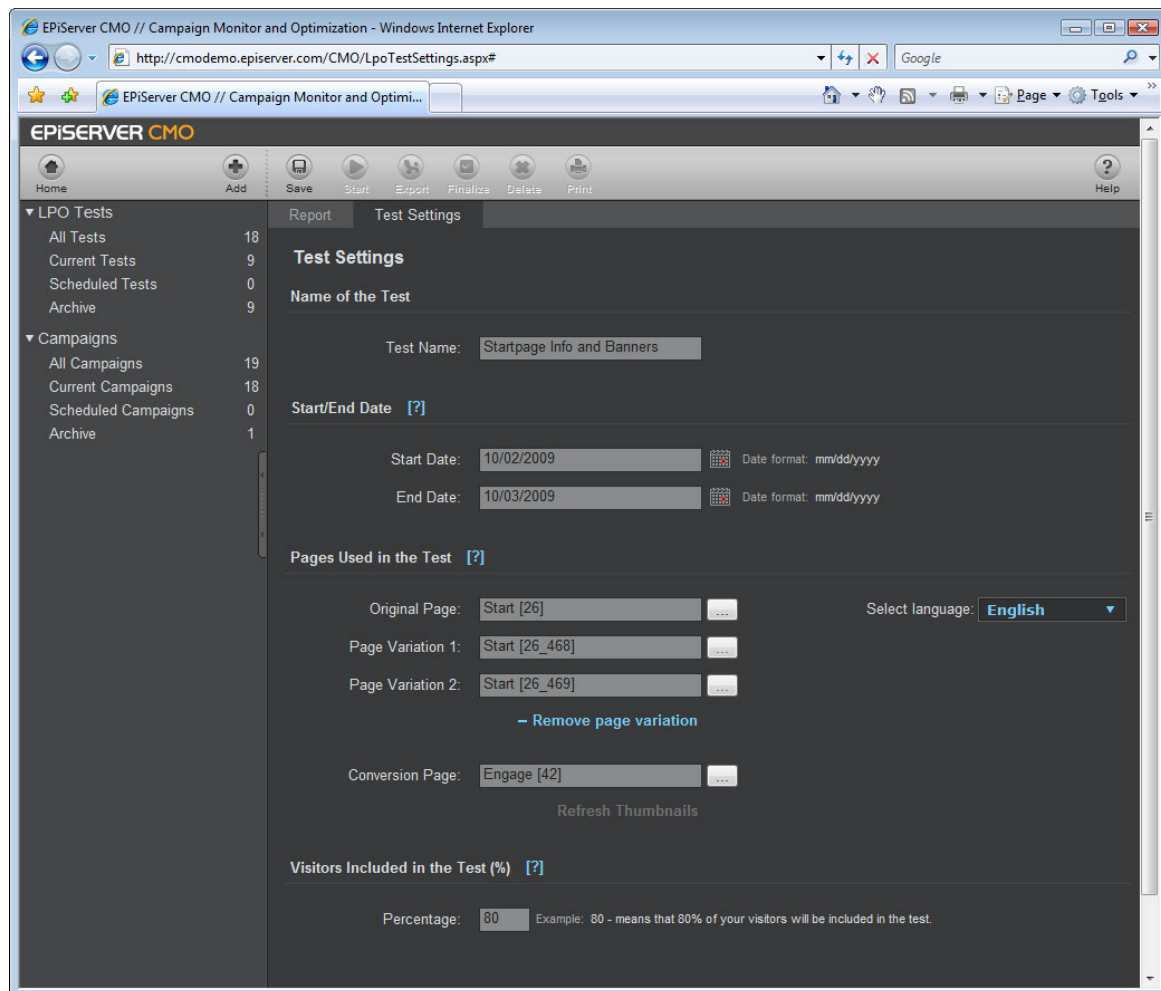
User Actions	CMO User (WebEditors)	CMO Admin (WebAdmins)
Add test	-	Yes
Modify test settings	-	Yes
Start test	-	Yes
Stop test	-	Yes
Finalize test	-	Yes
Delete test	-	Yes
View test report	Yes	Yes
Export	Yes	Yes
Refresh all thumbnails	-	Yes

## Access Rights in Campaign Monitor

User Actions	CMO User (WebEditors)	CMO Admin (WebAdmins)
Add campaign	Yes	Yes
Modify campaign settings	Yes	Yes
Start campaign	Yes	Yes
Stop campaign	Yes	Yes
Archive campaign	Yes	Yes
Delete campaign	Yes	Yes
View report	Yes	Yes
Export	Yes	Yes
Refresh all thumbnails	-	Yes
Access settings page in Admin mode (EPiServer CMS)	-	Yes

## About The Landing Page Optimizer (LPO)

Landing Page Optimizer (LPO) is used to test different variations of a web page. The method, established on the market as A/B testing, is based on variations of up to three pages - one original page and two variations. The test is performed against a separate common conversion page (landing page), which is the result of an action, for example registration via a web form.



An LPO test is a way of testing the performance of at least two entirely different pages to establish which variation of the content leads to more people taking the desired action to reach the conversion page. The variations can contain different content and layout, but all variations of a page must contain the same action that is to be performed, for example a link to another page.

During an LPO test, visitors to the website will either see the original page or a variation of the page, and performance will be measured to determine which variation of the page leads to the most people taking the desired action. It is possible to limit the percentage of visitors that will be included in the test, although by limiting the amount of visitors, the amount of time it will take for the test to give meaningful results is lengthened.

LPO calculates how effective each page was at meeting the goal in different test results. The goal of LPO is to find the "best" page. After the test has been completed and a winner has been elected, the "winning" page can be published and the other variations of the page disabled.



## EPiServer CMS and EPiServer CMO

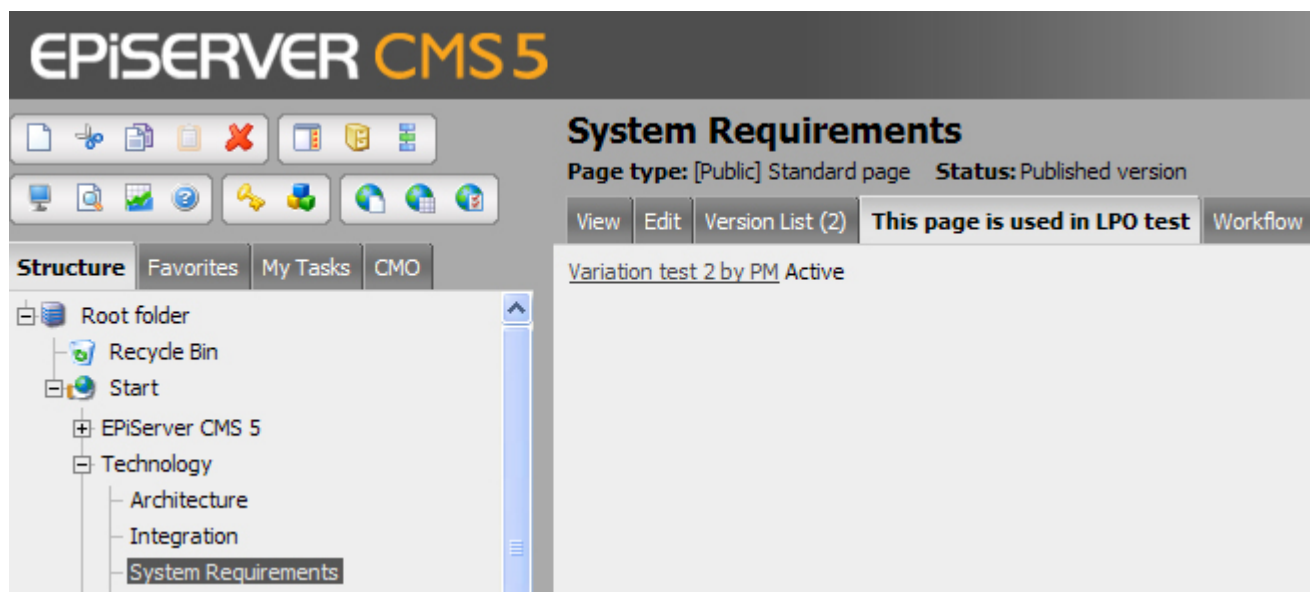
As EPiServer CMO is an add-on module to EPiServer CMS, all of the pages involved in the LPO testing must first be created in EPiServer CMS. The following pages must be created in EPiServer CMS before an LPO test can be created.

1. All the pages to be used in the test, including the original page, variation pages and the conversion page. The variation pages must offer the same action as the original page.
2. The conversion page is the page that is shown when the visitor has carried out the desired action.

When the original page in a test has been included in an LPO test, it should not be edited in Edit mode of EPiServer CMS during the test. If this is done, the test will “break”. This cannot be undone and the test will need to be redone. Variations of the pages can be edited.

### In EPiServer CMS Edit Mode

When a page is included in an active LPO, a new tab will appear in the EPiServer CMS Edit Mode for the page in question. The tab indicates that this page should not be changed or removed as it is included in an active LPO test.



## Recommendations of Use

An LPO test is not intended to last for longer periods of time. Our recommendation is that the test period for the LPO test is as short as possible, from one day to a maximum of four weeks depending on the application. An LPO test may also be terminated early as soon as test results have been presented and the probable winner can be appointed.

### LPO Test Status

**Active** - An active test is one that is currently running. If you create a test with start date set to today's date, then it will automatically be given the status Active when you click **Save settings**.

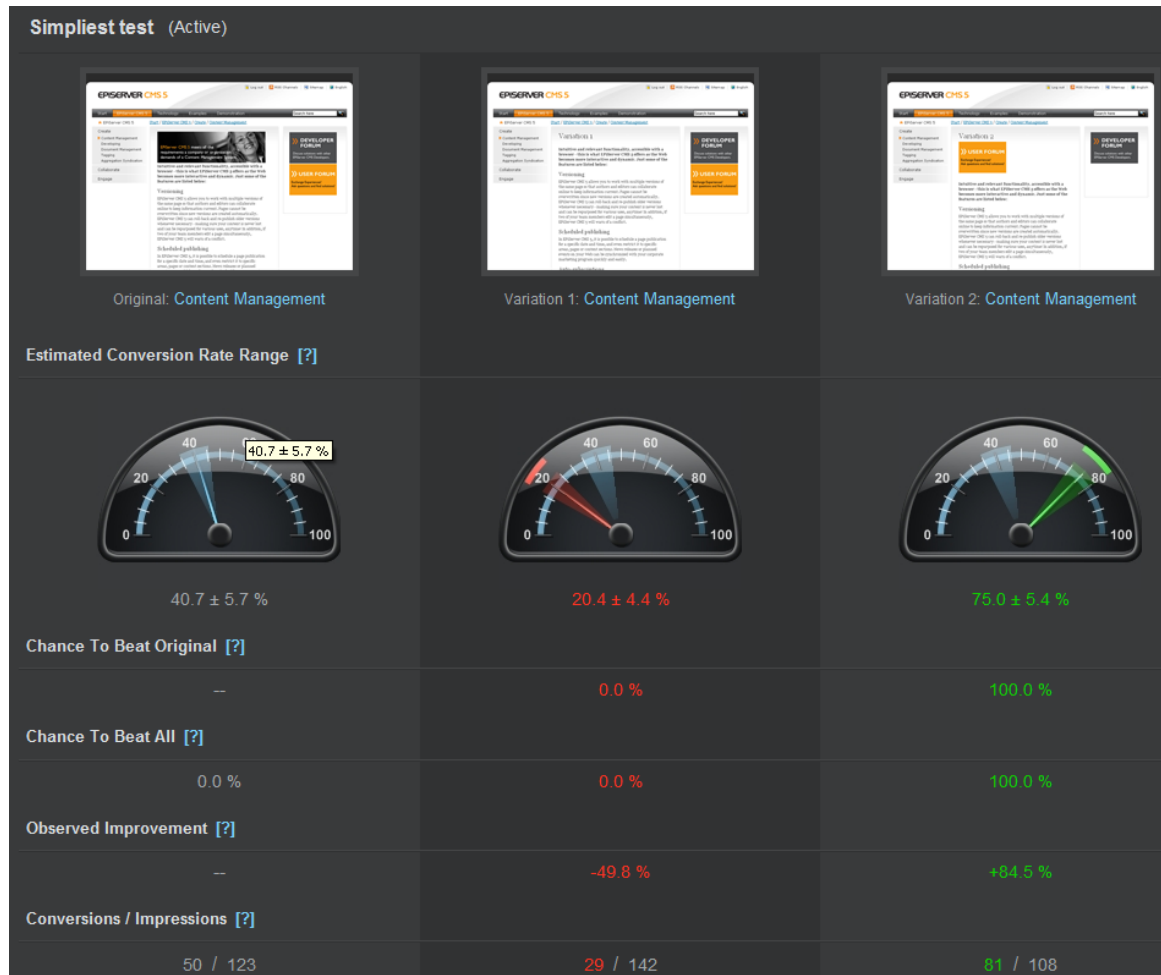
**Not started** - Tests with status not started have a start date in the future.

**Stopped** - A stopped test has been temporarily stopped for some reason. Stopped tests can be started again by clicking **Start** in the **LPO Report** window. Statistics are no longer collected, when a test has status Stopped.

**Finalized** - A test with status finalized has an expired end date.

## Handle and Analyze the Results of a Performed LPO Test

When an LPO Test has been performed, you will receive indications and statistics presented on how the different variations of a page have been used by the visitors compared to the original page. Based on the statistics, the editor can decide which page variation should be the published one, or maybe the original page is the most effective.



- Estimated Conversion Rate Range**

The gauges show data after a minimum of 10 impressions and 5 conversions and/or with a minimum difference of 5 between impressions and conversions. Each column works individually.

+/- range is a probability calculation based on the number of conversions/impressions, showing the most likely result for each variation compared with the original. The span of the range fields depends on the number of conversions/impressions and will become more precise as the number of conversions/impressions increases during the test.

- Chance To Beat original**

The "chance to beat original" value is the probability that, as the experiment progresses, the given combination's mean conversion rate will beat that of the original. Here a combination's performance is only measured against the original, ignoring all other combinations. Among combinations where this probability is high are good candidates to replace the original combination.

- Chance To Beat All**

The chance to beat all displays the probability that a combination will be more successful than all the other combinations running in the experiment. This number will tend to be lower than the corresponding number in the "chance to beat original" column because the given combination is competing with all the other combinations, and not just the original combination. When numbers in this column are high, perhaps around 95%, this means

that a given combination is probably a good candidate to replace your original content. Low numbers in this column mean that the corresponding combination is a poor candidate for replacement.

- **Observed Improvements**

Observed improvement displays the improvement (in percentage) over the original combination. Because this percentage is a ratio of the conversion rate of a combination of the original column, it will often vary widely. We suggest that you only concentrate on the observed improvement when a large amount of data has been collected and it can be considered more reliable.

- **Conversions / Impressions**

Shows the number of people who has taken the desired action and the number of people included in the test. If the result is 5000/12000 it means that 5000 visitors of the 12000 that has viewed the specific variation of page has taken the desired action.

## Overview of All LPO Tests

In EPiServer CMO several tests can be performed at the same time for various purposes. To be able to get an overview of all the tests that have been performed or are active right now use the different listings within the left menu navigation.

Name	Date	Modified By	Status
Annika testar LPO	10/01/2009	cmoadmin	Active
Demo for Chicago	09/28/2009	CMOAdmin	Finalized
Demo for international offices	09/08/2009	cmoadmin	Finalized
Demo for marketing and products	09/10/2009	cmoadmin	Finalized
Demo for UK	09/09/2009	cmoadmin	Finalized
Demo Monday	09/14/2009	cmoadmin	Finalized
Engage Test	09/24/2009	cmoadmin	Stopped
EPiServer Day 2009	09/28/2009	cmoadmin	Active
EPiServer Relate+ Event	09/23/2009	administrator	Stopped
Fall event	09/28/2009	cmoadmin	Stopped
Johans LPO test	09/14/2009	cmoadmin	Stopped
LPO med QD	09/28/2009	epidemo	Active
My first LPO-test	09/07/2009	epidemo	Finalized
My new test	09/08/2009	cmoadmin	Finalized
My new test 2	09/21/2009	cmoadmin	Finalized
Product Demo LPO Functional Test	09/28/2009	cmoadmin	Stopped
Rikard test	09/07/2009	CMOAdmin	Finalized
Start Page Banner Test	10/07/2009	CMOadmin	Not started
StartPage Banner for Engage	10/02/2009	CMOadmin	Stopped
testcampaign	10/01/2009	CMOAdmin	Active

- **All Tests**

Shows all tests that have been created within EPiServer CMO. In the All Tests listing you will find tests with status **Active**, **Finalized**, **Not Started** and **Stopped**.

- **Current Tests**

Shows tests that are not finalized. In the Current Tests listing you will find tests with status **Active** and **Stopped**.

- **Scheduled Tests**

Shows tests that have been created, but scheduled to be performed in the future. In the Scheduled Tests listing you will find tests with status **Not started**.

- **Archive**

Shows tests that have been finalized. In the Archive listing you will find tests with status **Finalized**.

## Add an LPO Test

LPO tests are created in the Test Settings page, which is only visible to users with editing access rights. A test will include different variations of a specific page. A variation is separate version of the page.

The screenshot shows the EPiServer CMO interface in Internet Explorer. The browser address bar shows the URL: `http://cmodemo.episerver.com/CMO/LpoTestSettings.aspx#`. The page title is "EPiServer CMO // Campaign Monitor and Optimization". The left sidebar contains a navigation menu with the following items:

- Home
- ▼ LPO Tests
  - All Tests: 18
  - Current Tests: 9
  - Scheduled Tests: 0
  - Archive: 9
- ▼ Campaigns
  - All Campaigns: 19
  - Current Campaigns: 18
  - Scheduled Campaigns: 0
  - Archive: 1

The main content area is titled "Test Settings" and contains the following fields:

- Name of the Test:** Test Name: Startpage Info and Banners
- Start/End Date [?]:**
  - Start Date: 10/02/2009 (Date format: mm/dd/yyyy)
  - End Date: 10/03/2009 (Date format: mm/dd/yyyy)
- Pages Used in the Test [?]:**
  - Original Page: Start [26]
  - Page Variation 1: Start [26\_468]
  - Page Variation 2: Start [26\_469]
  - Remove page variation
  - Conversion Page: Engage [42]
  - Refresh Thumbnails
- Visitors Included in the Test (%) [?]:**
  - Percentage: 80 (Example: 80 - means that 80% of your visitors will be included in the test.)

To perform the LPO Test you must have different versions of the page that you are about to test. The versions must be prepared beforehand in the Edit mode of EPiServer CMS. The original page is always the version that has status Published Version. The versions for the variation pages can however have status Not Ready (Checked Out) or Ready to Publish (Checked In).

All pages included in the test can be changed or deleted up until the test has started.

1. Click **Add** in EPiServer CMO and select **LPO Test**. (Add is used to add both LPO tests and campaigns.)
2. Enter the name of the test in the **Test Name** field. Choose a meaningful name that will help you easily distinguish between a large amount of tests.
3. Enter a start date and end date for the test by clicking the calendar icon and selecting a date. The start date can be changed up until the test has been activated. The end date can only be changed on paused tests.
4. Select an original page to use in the LPO test by clicking **Browse** in the **Original Page** field and selecting a page from the website. The page name and ID is displayed in the field.
5. Browse to a variation page by clicking **Browse** in the **Variation Page** field and selecting a page from the website. Add a second variation page by clicking **Add variation page** and browsing. An LPO test can contain two

variation pages. Try to make the variations as different as possible, as variations that are too similar may provide inconclusive results,

6. Select a conversion page by clicking **Browse** in the **Conversion Page** field and selecting a page from the website. If the LPO test contains an original page that has a link to another page on the site, the conversion page is the page that the visitor sees when they click the link. A conversion page is the target page for which you want the visitor to proceed to in order to fulfill the task. A conversion page can only be used in one active LPO test.
7. Enter how much of the traffic you want to be included in the test by entering a percentage value in the **Percentage** field. If you enter "80" in the field, only 80% of your visitors will be included in the test. The rest of the visitors, 20%, will not be included in the test and will always see the original page. The more traffic that is included in the test, the faster the test will run. Enter a high percentage to ensure meaningful results. This is even more important if you choose a short test period.
8. Click **Save settings** to save the test. The test will appear under **Current Tests** if it had a scheduled start date today, or under **Scheduled Tests** if the start date was scheduled for the future.

## Modify an Existing LPO Test

To modify an existing LPO test, the test needs to have the status Active. The only settings that you can change on an active test is the test name, end date and the percentage of visitors included in the test.

1. Click **Stop**. The test will then automatically stop. The test data will however be restored and will continue when you start the test again.
2. Change the settings for the LPO test.
3. Click **Save**.
4. Click **Start**. The test will then automatically start again.

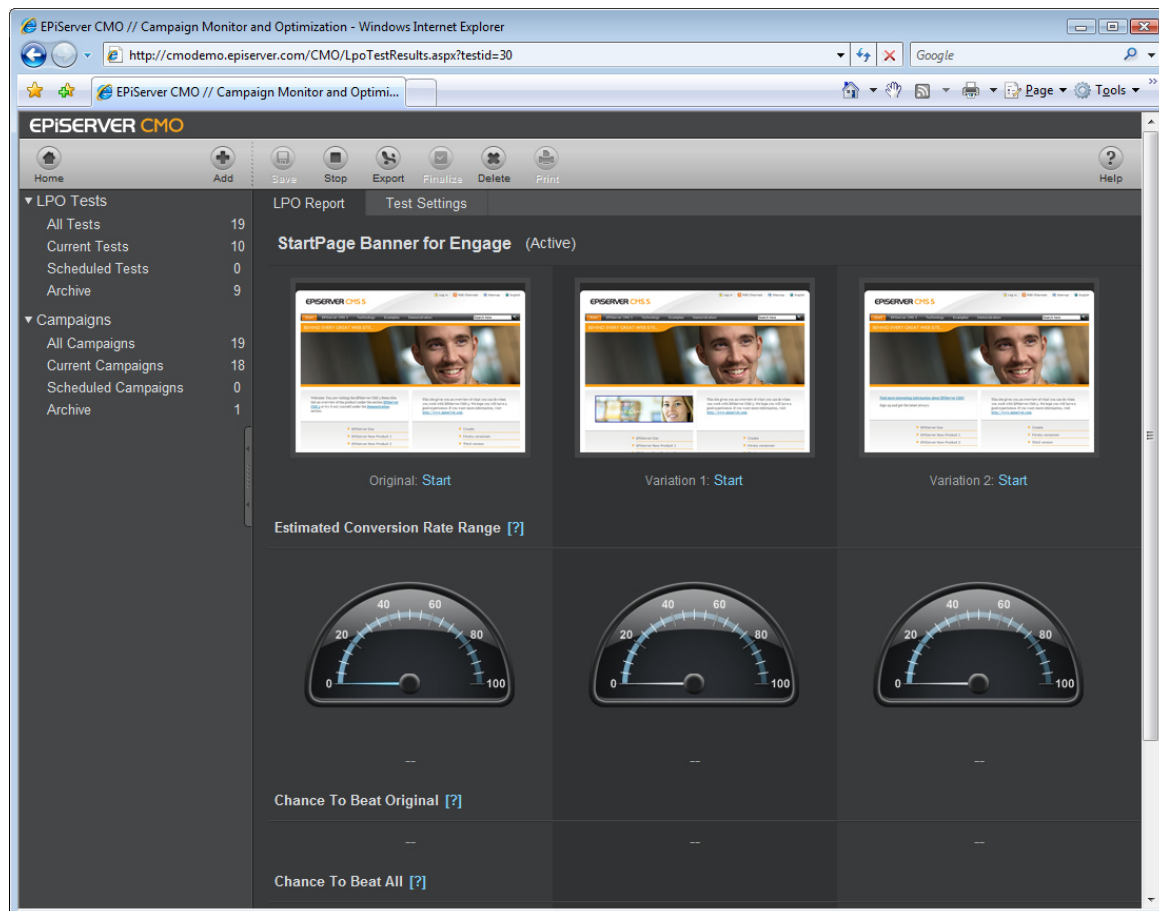
## Delete an LPO Test

You can choose to delete the current test.

1. Click **Delete**. The test will then automatically be deleted. No test data will be restored.

## Finalize an LPO Test

When the test period for the LPO test has expired, you need to decide if the original or one of the variations of the page should be the winner. You can follow the progress of the test and choose the winner from the LPO Report page.



## Choose The Winner

When you choose the winner, the status of the specific version of the page will change automatically to Published Version and the versions that were previously included in the test will not be shown to the visitors. You will still be able to find the different versions in the Version List in the Edit Mode of EPiServer CMS.

1. Click **Winner** in the top the thumbnail of the original or variation that you want to be the winner of the LPO test.

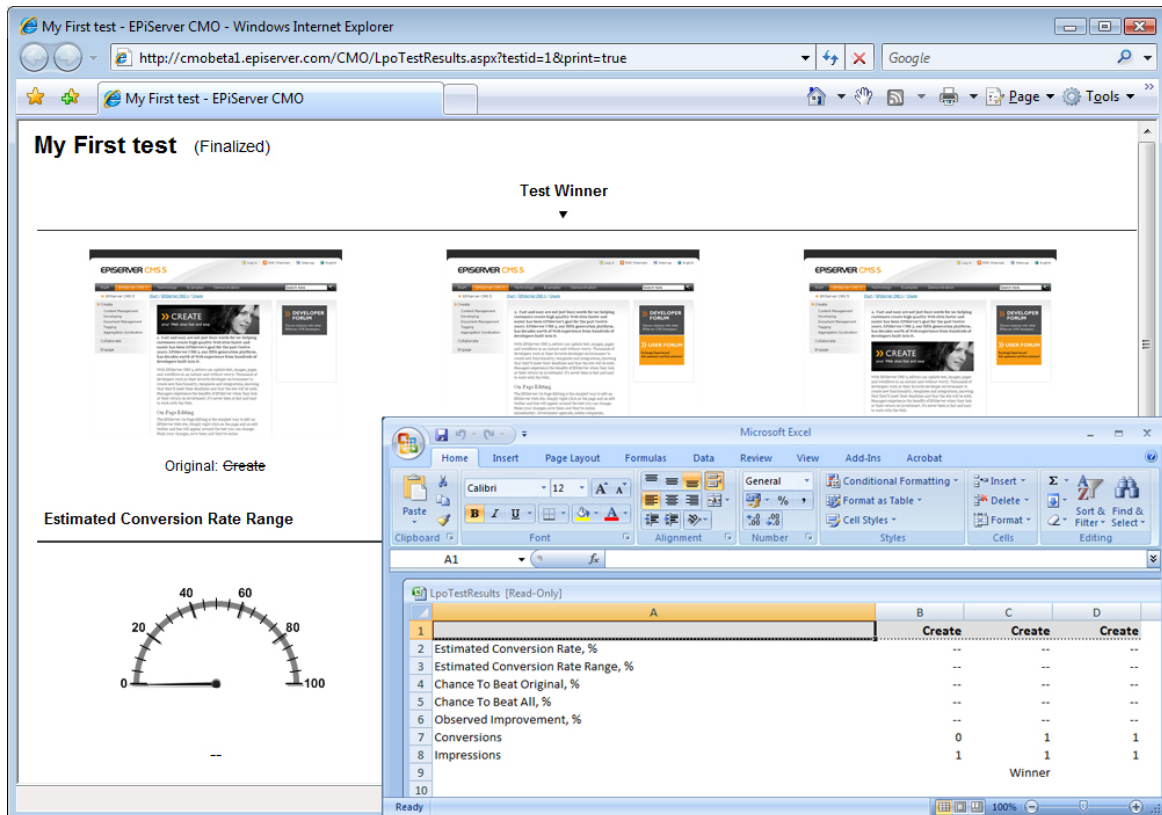
## Finalize an LPO Test Manually

You can also finalize the LPO test manually before the end date has passed. This could be useful in cases where the test has given an adequate test result over a shorter period of time than that scheduled.

1. Click **Stop** to stop the test.
2. Click **Finalize** to indicate that you want to choose the winner of the test.
3. Click **Winner** in the top the thumbnail of the original or variation that you want to be the winner of the LPO test.

## Export or Print the LPO Test Results

When the LPO test is running or finalized, you can choose to export the report to Microsoft Excel or print the test results.



## Export Test Results

If you want to continue working with the statistics gathered in the performed test, you can choose to export the test results to Microsoft Excel.

1. Choose the test you want to export.
2. Click **Export** and then **Open** if you want to open the file directly in Microsoft Excel, or **Save** to save the results in Microsoft Excel file format.

## Print Test Results

1. Choose the test you want to print.
2. Click **Print**. The test result will then open in a new window with a printer-friendly layout.

## About The Campaign Monitor (CM)

Campaign Monitor is an intuitive, graphical dashboard that shows you in real time how your campaigns are performing. Campaign Monitor allows you to select which web pages you want to include in a campaign. You can monitor and get detailed information about the campaign pages through different functions:

### Conversion Path

Conversion path monitors the users' conversion rates between predefined web pages. You can use the conversion path function to reach a deeper understanding of your web visitors' behavior to optimize the website and achieve better results.

### Key Performance Indicators

Key performance indicators give you the possibility to define and measure different predefined actions on the web pages. KPIs are converted into KPI values, for example, market value or points. You can plan and budget for an estimated KPI value for the campaign period and monitor the result in real time. KPI values can be set on actions like downloads of files, web form postings, web page visits, incoming traffic to a page from a specific URL (to track users from specific websites) banner ads and more.

### Live Monitor

Live Monitor gives you a real-time view of visitors to the campaign pages on the website including the originating source information of your visitors.

### General Statistics

General Statistics gives you detailed statistics of the campaign pages, including number of visits, new and returning visitors, number of page views, visit duration times, user information, browser types. General statistics can be collected and monitored for all pages in a campaign during the campaign period.

### EPiServer CMS and EPiServer CMO

As EPiServer CMO is a module to EPiServer CMS, all of the pages involved in the campaign monitor must first be created in the corresponding EPiServer CMS website. The campaign monitor collects statistics from selected EPiServer CMS pages that have been included in the campaign. This will be done regardless of language version of the page. Statistics will be collected from all language versions combined in the same value.

### Recommendations for Usage

The campaign monitor is not intended to replace a web statistics tool, where all of your pages will be included in a campaign and the campaign period is very long. Our recommendation is that a campaign should include up to approximately 100 pages and that the period of active campaign is up to 2 months.

### About Key Performance Indicators

Key performance indicators (KPI) are one of the fundamentals within Campaign Monitor and give you the possibility to define and measure different predefined actions on the web pages.

KPIs are converted into KPI values, for example, market value or points. You can plan and budget for an estimated KPI value for the campaign period and monitor the result in real time. KPI values can be set on actions like form postings, page visits, incoming traffic to a page from a specific URL (to track users from specific websites), banner ads and more.



## KPI Types

When defining a campaign, you can use three different types of KPI depending on the action you want to measure.

### HTTP Referrers

HTTP Referrers is used to measure traffic from a predefined URL or domain. Depending on how the referrer is defined, the behavior and the count of KPI will be different. The given URL can contain protocol (http, https), domain name, port number (localhost:17000), path, page name and query parameters.

#### Example 1: google.com

KPI will be calculated for all incoming traffic from the sub-domains and possibly from paths before and after the specified domain name listed, for example ad1.google.com and google.com/en/support.

#### Example 2: google.com/advertisements

KPI will be calculated for all incoming traffic from sub-domains and paths by following the specified domain name listed, for example ad1.google.com/advertisement and google.com/advertisement/test/support.

#### Example 3: http://www.google.se/preferences?hl=sv

KPI will be calculated only for the traffic from the absolute URL specified, http://www.google.se/preferences?hl=sv.

### Forms

KPI type Form is used to measure when a visitor posts a web form. One page could contain several web forms and you need to define which one should be connected to the specific KPI that you are creating.

### Page Views

KPI type Page Views measures a general page visit. This KPI could be used in more complex scenarios when the page is only shown when users perform an action on the website. This could for example be the "Thank You page" after posting a web form or a confirmation page after placing an order of some kind.

## KPI Entity or Value

The entity or value of the KPI is set to count the profit of the investment or effort.

A good way to value a goal is to evaluate how often the visitors who reach the goal become customers. If your sales team, for example, can complete the sale with 10% of people who request to be contacted, and your average transaction is 5 000 SEK, you can assign the "Contact Me" 500 SEK (i.e. 10% of 5 000 SEK). On the other hand, if only 1% of the alerts for a mailing list leads to a sale, you can only assign the "Registration for the mailing list of" 50 SEK.

### Types of Entities To Use

- Points
- British Pounds (£)
- Euro (€)
- Dollars (\$)
- Crowns (KR)

## About Conversion Paths

Conversion path monitors the users' conversion rates between predefined web pages. You can use the conversion path function to reach a deeper understanding of your web visitors' behavior to optimize the website and achieve better results.

### How Many Visitors Reached the Target Page?

The conversion paths show how many visitors that have actually reached the target page of the campaign. The conversion paths will also show where and how many of the visitors have exited during the campaign and not reached

the target page. Based on this information the editor can choose to make the page clearer and efficient to quickly lead the visitors to the target page.

### Examples Target Pages

Any page can be a target page on the website. It could be a specific article, news page or standard page. In order to get a satisfactory result for the campaign, the target page could preferably focus on some kind of action. Like for example a "Thank You page" that the visitor reaches after posting a form or a confirmation page after posting an order.

## About Reports For a Campaign

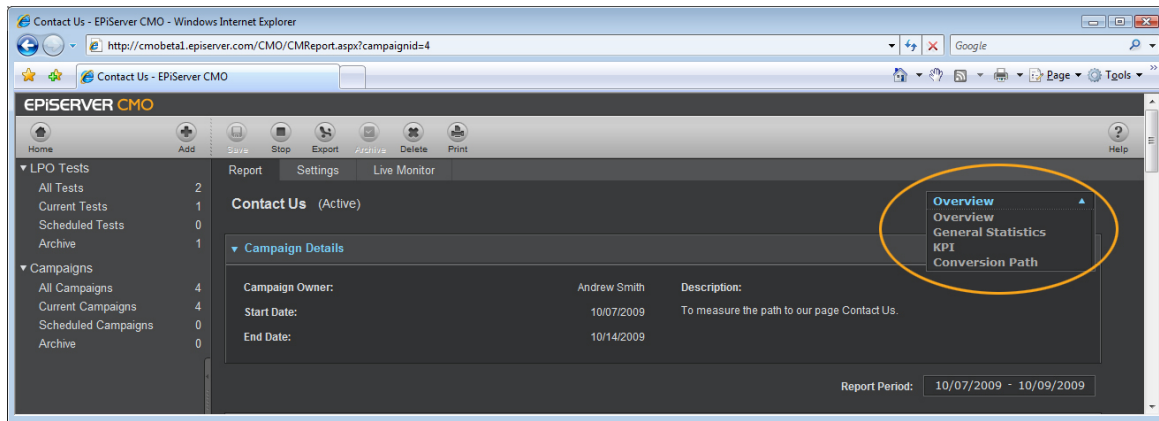
It is possible to create a detailed statistics report for each campaign. The available reports can be found in the Report page. When you enter the Report page you will get an overview for the campaign with the campaign details, general statistics for visits, referrers and a summary of the existing KPIs and conversion paths.



The **Overview** provides information about how the campaign is proceeding.

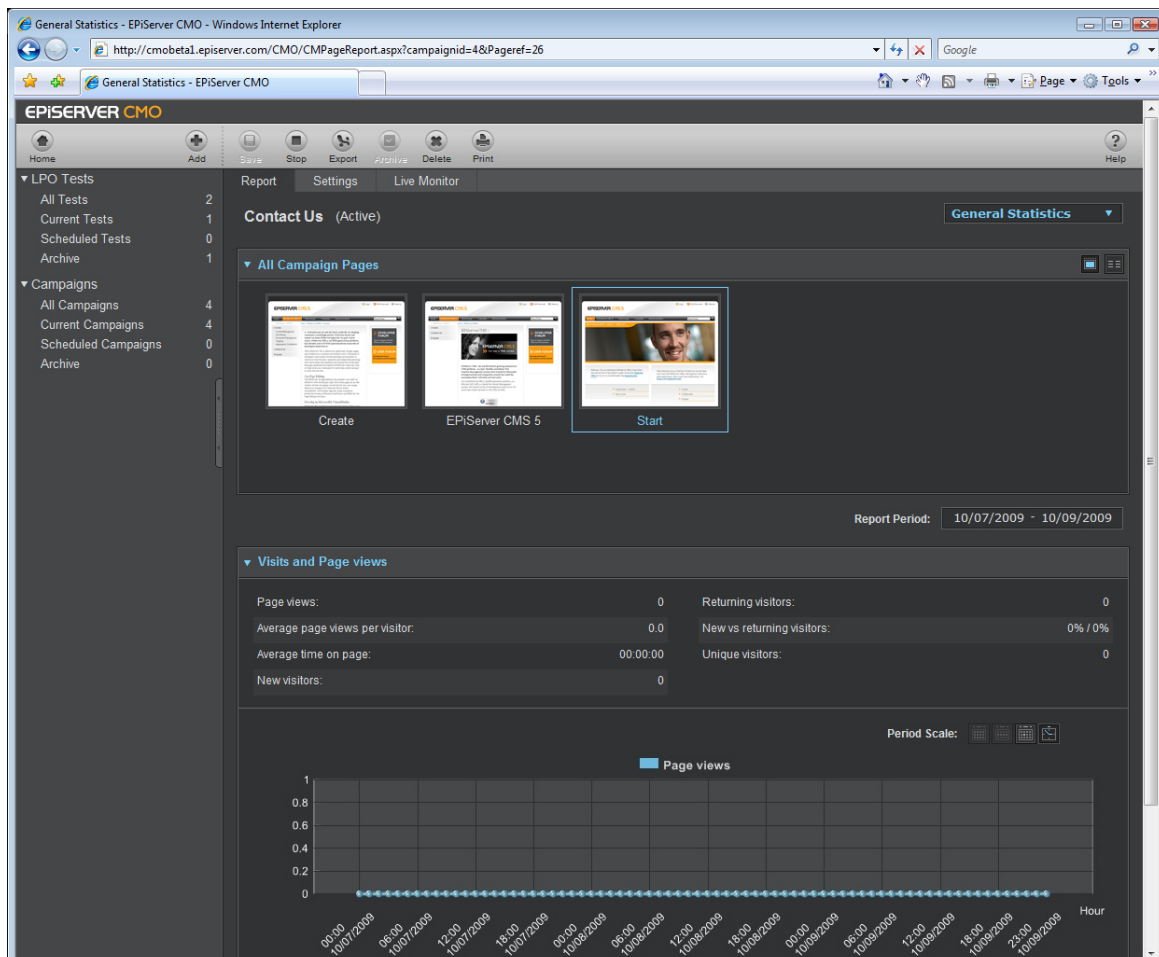
### Change Report Type

If you require more detailed reports, select the **General Statistics**, **KPI** and **Conversion Paths** reports.



## General Statistics Report

The General Statistics report displays more detailed information about the separate pages that are included in the campaign. The report shows statistics for how many page views of a specific page, how many new visitors, how many returning visitors, etc.



## View the Report

1. Click the specific page for which you want to view the statistics. The page will be highlighted after selection.
2. Select **Report Period** for the statistics.

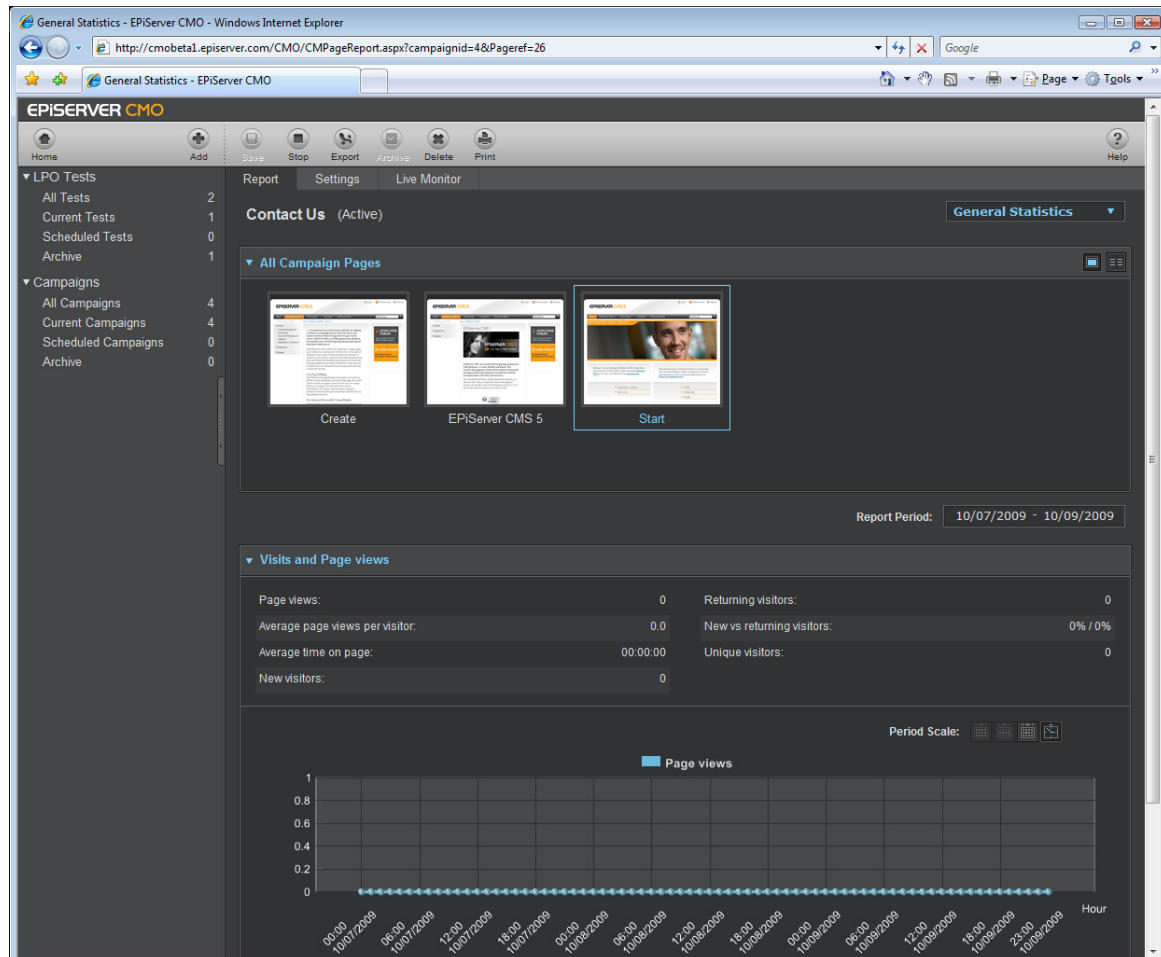
3. Select how you want to view the statistic chart for Page Views in the setting **Period Scale**.

### Print the Report General Statistics

1. Click **Print**. The General Statistics report will then open in a new window with a printer-friendly layout.

## Detailed KPI Report

The KPI Report shows detailed information about the results of the defined KPIs set for specific pages in the campaign.



### View Report

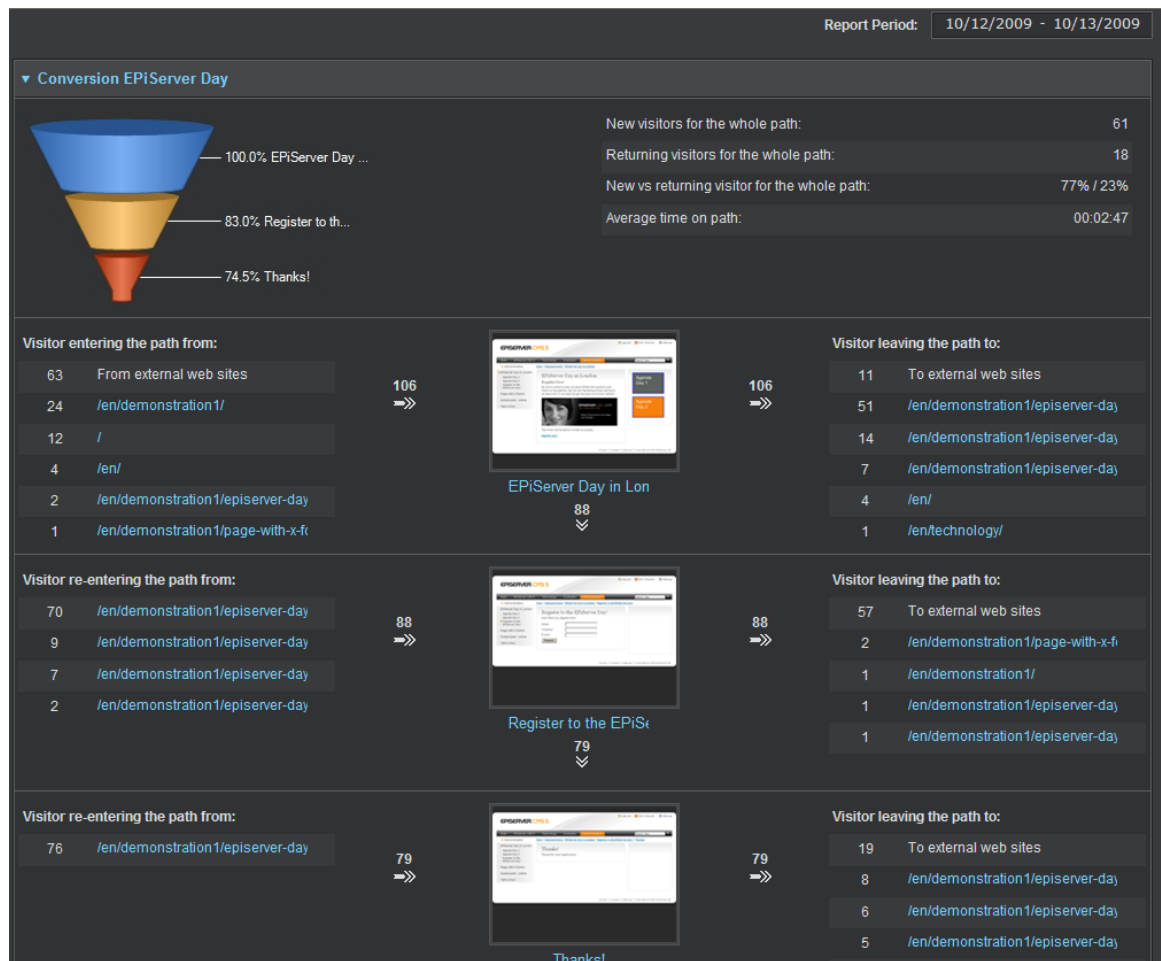
1. Click the specific page for which you want to view statistics. The page will be highlighted after selection.
2. Select **Report Period** for the statistics. All the defined KPIs for the specific page will be shown.

### Print the Report KPI

1. Click **Print**. The KPI will report then open in a new window with a printer-friendly layout.

## Conversion Path Report

The Conversion Path report provides detailed information about the result of the defined conversion paths that have been set for specific pages set in the campaign. You will see general statistics about how many of the visitors are new to the whole path, how many visitors that are returning and the average time spent on the path.



### Change Period For The Report

Change the period of the report by selecting **Report Period** for the statistics. Enter the start and end date that you want to base the report on. All the defined KPIs for the specific page will be shown.

### How to Read the Conversion Paths Statistics

#### General Statistics and the Funnel

The first part of the report shows general statistics about the result of the conversion path, for example how many visitors have passed the whole path, how many of those are new and returning visitors.

The funnel visualizes the number of visitors that has reached the different levels of the path. The blue level is the first level and the red is the last level. There can be up to four different levels depending on how the conversion path is defined for the campaign. The height of each level depends on the conversion rate.

#### Visitors Behavior within the Conversion Path

The second part of the report visualizes how the visitors have been entering, passing and exiting the conversion path.

#### Visitors Entering The Path From

On the first level, in the left column you can see the number of visitors entering the conversion path and from where they came. You can then easily follow the visitors' behavior between the different levels by following the arrows that show the direction of the visitors path and you will also see how many have been using the path.

#### Visitors Re-entering Path From

On the lower levels of the conversion path, the left column will give you information about visitors that enter the path from other internal pages. This means that a number of visitors could have been navigating to other pages on the website that are not included in the conversion path, but then returned to the path and continued the path from there. The visitor will not be included in the continued conversion path if the visitor enters the path on the wrong level. The right column includes a list of the six pages that are most common to exit to.

### Visitors Leaving The Path To

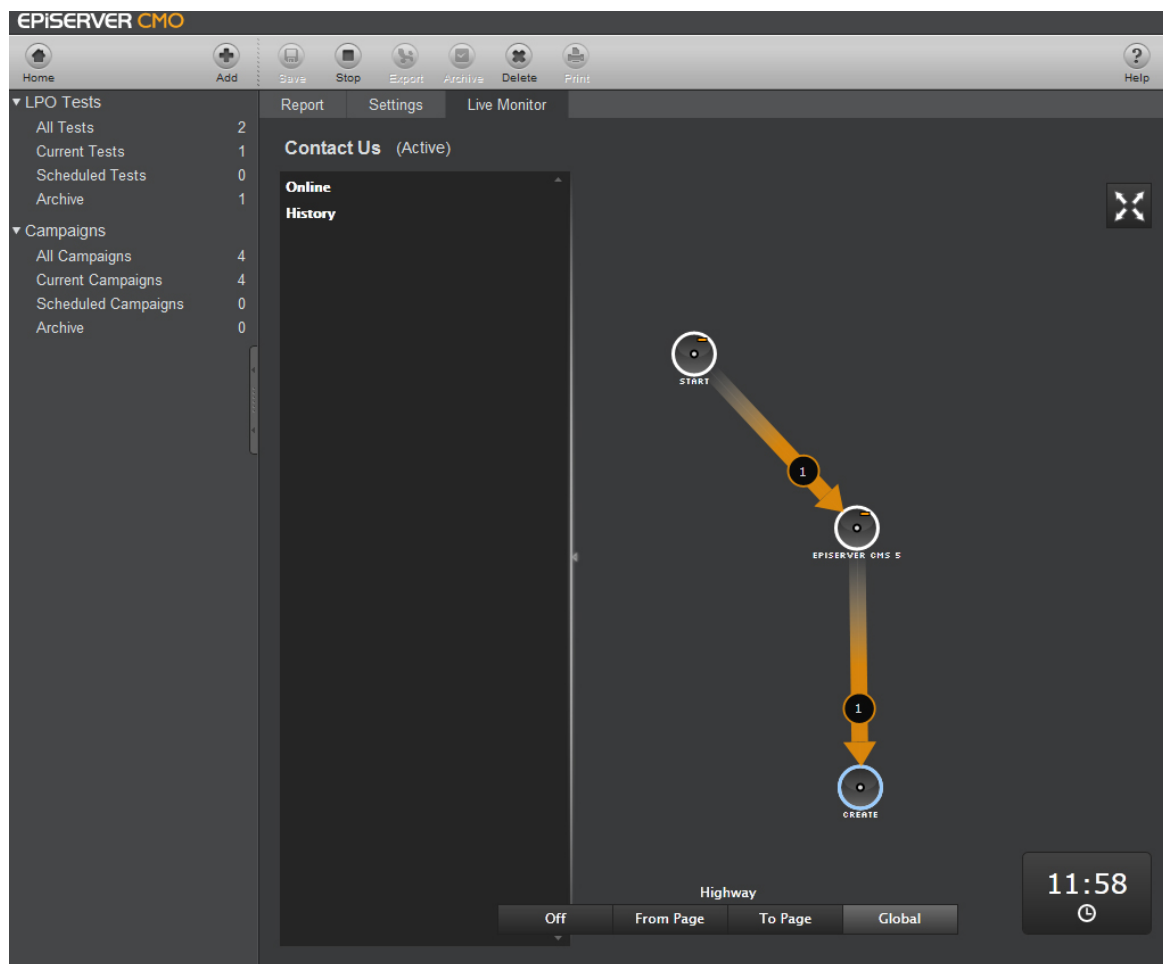
In the right column on all levels you will see the number of visitors exiting the level to other external and internal pages. The right column also includes a list of the six pages that are most common to exit to.

### Print The Report Conversion Path

Click **Print**. The Conversion Path report will then open in a new window with a printer-friendly layout.

## About Live Monitor

You can follow the visitors live as they move around on the website on the pages included in the campaign. The live monitoring can be found in the Live Monitor page.

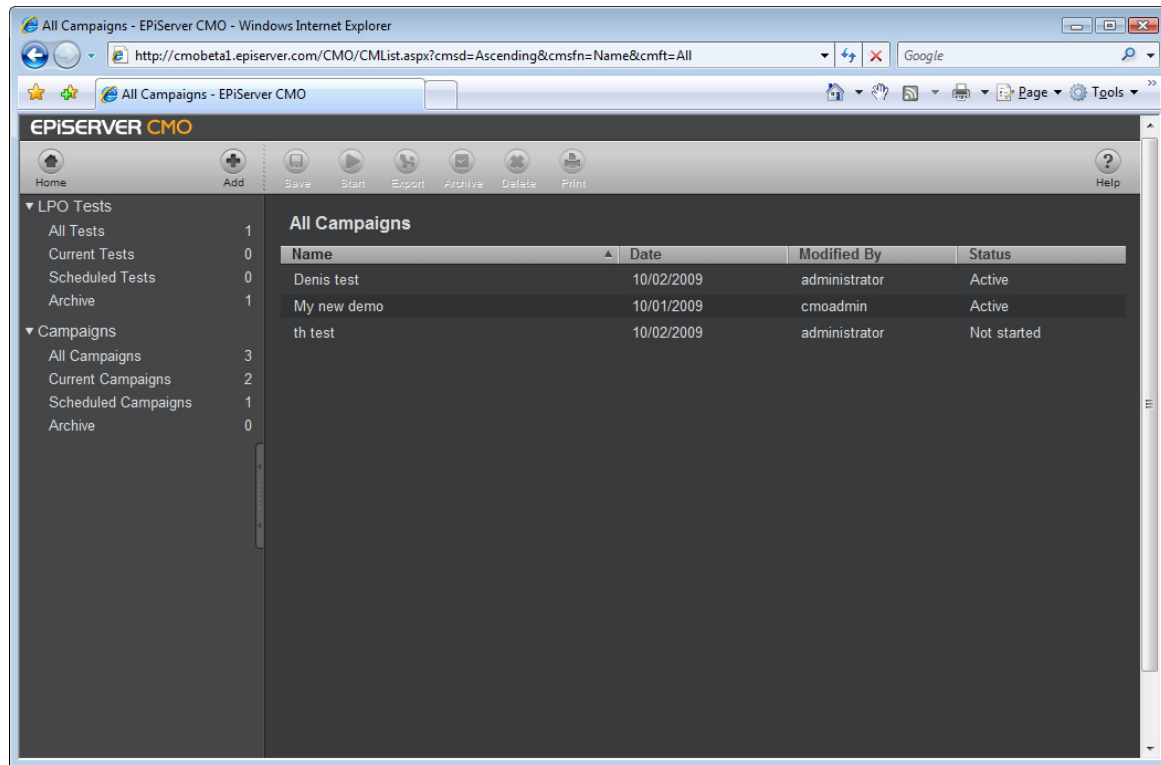


When you open the Live Monitor, the circles visualize the pages that are included in the defined conversion path. Double-click on the circles to expand to the next level. If you want to see the visitors' paths through the campaign pages and how many, use the **Highway buttons**.

You can also choose to view the **Live Monitor** in a history perspective. The Live Monitor will then show statistics from the start date of the campaign.

## Overview of All Campaigns

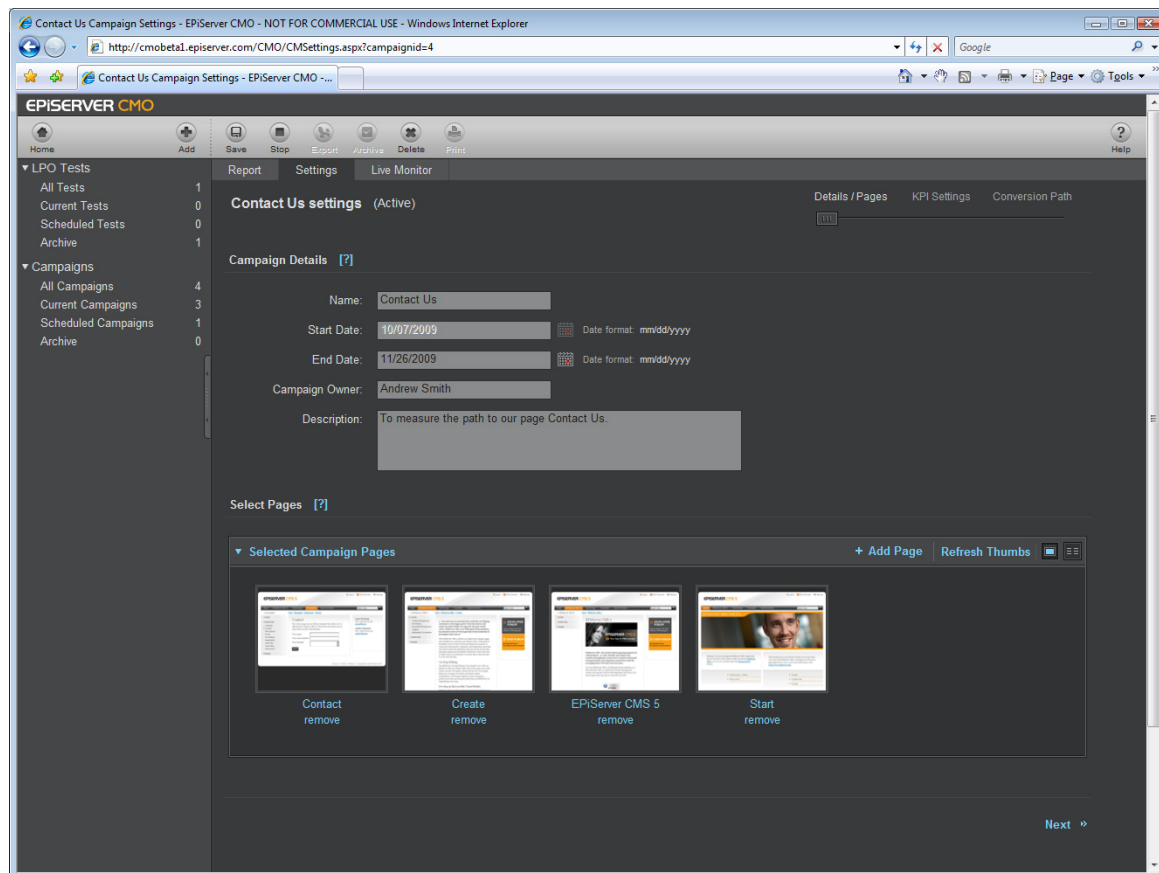
In EPiServer CMO several campaigns can be performed at the same time for various purposes. To get an overview of all the campaigns that have been performed or are active right now, use the different listings within the left menu navigation.



- All Campaigns**  
 Shows all tests that have been created within EPiServer CMO. In the All Campaigns listing you will find campaigns with status **Active**, **Finalized**, **Not Started** and **Stopped**.
- Current Campaigns**  
 Shows campaigns that are not finalized. In the Current Campaigns listing, you will find campaigns with status **Active** and **Stopped**.
- Scheduled Tests**  
 Shows campaigns that have been created but are scheduled to be performed in the future. In the Scheduled Campaigns listing you will find campaigns with status **Not started**.
- Archive**  
 Shows campaigns that have been finalized. In the Archive listing you will find campaigns with status **Finalized**.

## Add a Campaign

Campaigns are created in the Settings page. A campaign can include both KPIs and conversion paths or each of them separately.



## Campaign Details

The first step in adding a new campaign is to set the campaign details. This is mandatory for all campaigns.

1. Click **Add** and select **Campaign**. (Add is used to add both LPO tests and campaigns.)
2. Enter the name of the campaign in the **Name** field. Choose a meaningful name that will help you easily distinguish between a large amount of campaigns.
3. Enter a start date and end date for the campaign by clicking the calendar icon and selecting a date. The start date can be changed up until the campaign has been activated. The end date can be changed during the campaign.
4. Select the pages that should be included in the campaign by clicking **Add Page** in the **Select Pages** field. The page names are displayed in the field and a thumbnail of each page included.
5. Click **Next** or **Save** to activate the campaign..

## KPI Settings

A campaign can contain key performance indicators (KPI) which makes it possible for you to define and measure different predefined actions on the web pages. One web page can have more than one KPI defined.

### Add a KPI for HTTP Referrer

1. Choose **KPI Entity** in the drop-down menu.
2. Click the thumbnail of the specific page to which you want to add a KPI.
3. Select the KPI Type **HTTP Referrers**.
4. Enter the name of the KPI in the **Name** field. Choose a meaningful name that will help you easily distinguish between a large amount of KPIs.
5. Enter a value of the KPI in the **Value** field.
6. Enter an expected value in the **Expected Value** field.



7. Enter the URL for the referrer in the **HTTP referrer** field.
8. Click **Add** to save and add the KPI to the specific web page.

#### Add a KPI for Forms Type

1. Choose **KPI Entity** in the drop-down menu.
2. Click the thumbnail of the specific page to which you want to add a KPI.
3. Select the KPI Type **Forms**.
4. Enter the name of the KPI in the **Name** field. Choose a meaningful name that will help you easily distinguish between a large amount of KPIs.
5. Enter a value of the KPI in the **Value** field.
6. Enter an expected value in the **Expected Value** field.
7. Select the form that should be added to the KPI, The **Form name** field will then appear. If you choose to enter manually, you must enter the **Form Name** field manually.
8. Click **Add** to save and add the KPI to the specific web page.

#### Add a KPI for Page Views

1. Choose **KPI Entity** in the drop-down menu.
2. Click the thumbnail of the specific page to which you want to add a KPI.
3. Select the KPI Type **Page Views**.
4. Enter the name of the KPI in the **Name** field. Choose a meaningful name that will help you easily distinguish between a large amount of KPIs.
5. Enter a value of the KPI in the **Value** field.
6. Enter an expected value in the **Expected Value** field.
7. Click **Add** to save and add the KPI to the specific web page.

#### Save The Campaign or Add Conversion Paths

- If you are only going to use KPI settings for this specific campaign, click **Save** to save and activate the campaign.
- If you want to add conversion paths to the campaign, click **Next**.

### Conversion Paths

A campaign can contain conversion paths, which makes it possible for you to analyze how many visitors that have actually reached the target page of the campaign. You can have more than one conversion path per campaign.

1. Choose **Add New Conversion Path**.
2. Enter the name of the conversion path in the **Name** field. Choose a meaningful name that will help you easily distinguish between a large amount of conversion paths.
3. Click on the first empty thumbnail box to select it.
4. Click **Add** on the specific page in **All Campaign Pages** that you want to have in the first step of the conversion path. Continue this step until you have created the steps you want to have in the path. The maximum number of steps are four.
5. Click **Save Path** to save and add the conversion path to the campaign.
6. Click **Save** to save and activate the campaign.

### Modify a Campaign

Campaigns are modified in the Settings page. To modify an existing Campaign the test needs to have the status Active.

#### Modify Campaign Details and Pages

In an ongoing campaign you can change the fields:

- Name
- End date
- Campaign Owner
- Description

You can also add or remove campaign pages.

## Modify KPI Settings

In an ongoing campaign you can change KPI Entity, add and remove KPIs for pages.

## Modify Conversion Path

In an ongoing campaign you can add new conversion paths and remove conversion paths.

You cannot change an existing conversion path in an ongoing campaign.

## Delete a Campaign

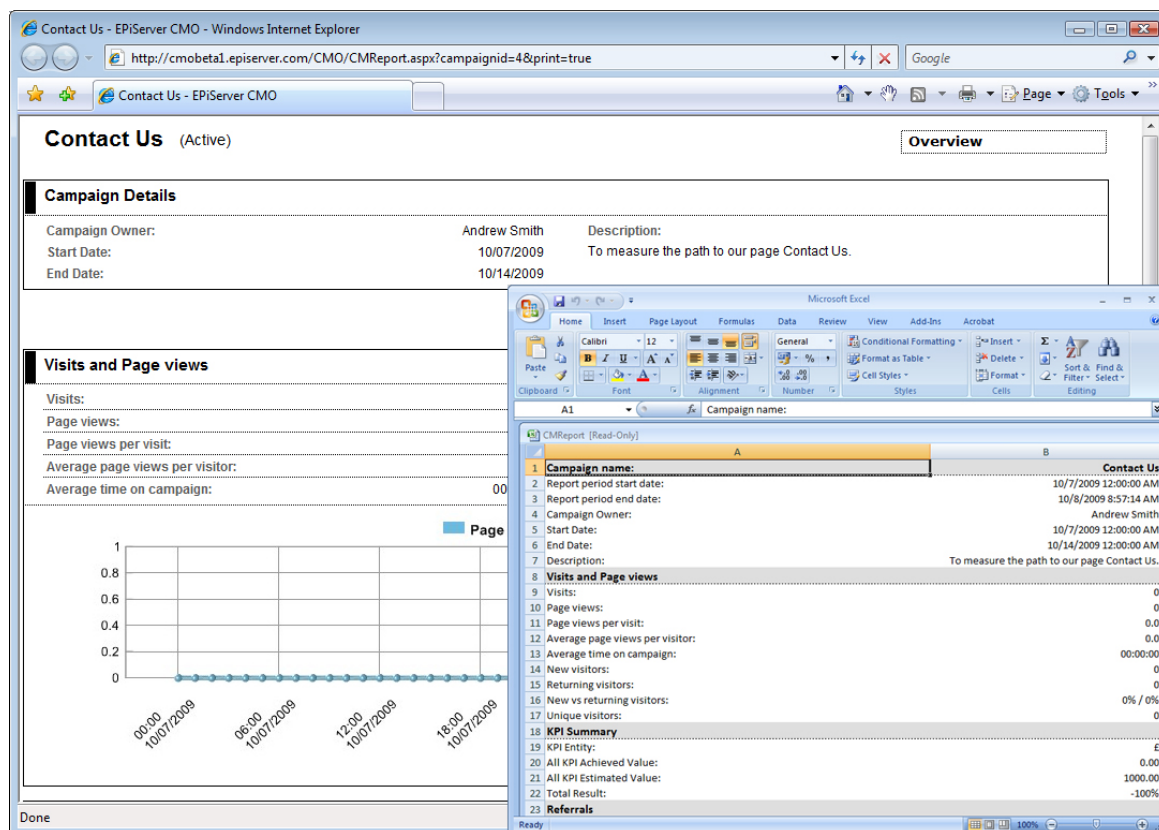
You can choose to delete the current campaign.

1. Click **Delete**. The campaign will then automatically be deleted. No campaign data will be restored.

Remember that your changes to an ongoing campaign may affect the result of the campaign as new parameters are added or removed.

## Export or Print Campaign Results

You can export or print the campaign results when the campaign is running or finalized.



## Export Campaign Results

If you want to continue working with the statistics gathered in the campaign, you can choose to export the results to Microsoft Excel.

1. Choose the campaign you want to export.
2. Click **Export** and then **Open** if you want to open the file directly in Microsoft Excel, or **Save** to save the result as an Microsoft Excel file format.

## Print Campaign Results

1. Choose the campaign you want to print.
2. Click **Print**. The campaign result will then open in a new window with a printer-friendly layout.

## Administering EPiServer CMO

The administration of EPiServer CMO is done in the EPiServer CMS Admin mode for the website containing the EPiServer CMO installation. All the settings are available under the **CMO Settings** command in the **Admin** tab. Enter the appropriate values and click Save.

### General Settings

1. Enter a time in seconds for how many seconds you want to pass until the cache times out for the CMO data in the **Cache timeout for CMO data (seconds)** field.
2. Enter the URL of the statistics handler in the **Statistics handler URL** field.
3. Enter the minimum number of landing page impression to start calculating statistics values. Note that if this value is less than 100, the LPO report will show inaccurate data until the number of impressions reaches 100.
4. Enter the minimum difference between conversions/impressions to calculate statistic values.
5. Enter the period used to display a recently changed list of tests and campaigns and the cookie expiration period for users not in an LPO test. Both of these values are should be stated in days.
6. Select whether you want to count the impressions and conversions multiple times by selecting/clearing the check box.

EPiSERVER CMS 5

You are logged in as: hoppo [Log out](#)

**Admin** Config Page Type

Search User/Group  
Create User

**Scheduled Jobs**  
Archive Function  
Mirroring Service  
Automatic Emptying of Recycle Bin  
Subscription  
Publish Delayed Page Versions

**Tools**  
Export Data  
Import Data  
File Management  
CMO Settings  
Workflows  
Content Channels

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### CMO Settings

Settings page for EPiServer CMO.

[Save](#) [Cancel](#)

**General Settings** Data Aggregation Security Page Thumbnails Live Monitor

Cache timeout for CMO data (seconds)

Statistics handler URL

Min. landing page impressions to start calculating statistic values \*

Min. difference between conversions/impressions to calculate statistic values

Period used to display recently changed list of tests and campaigns (days)

Cookie expiration period for users not in an LPO Test (days)

Count impressions and conversions multiple times ☐

\* If the value is less than 100, the LPO report will show inaccurate data until the number of impressions reaches 100.

### Data Aggregation

1. Select whether you want to run aggregation when the service starts by selecting the **Run aggregation on service start** check box.
2. Enter a data aggregation interval (in minutes) in the **Data aggregation interval (minutes)** field.
3. Enter a user number to enter when aggregation starts.
4. Enter the maximum idle time in one visit (in minutes).
5. Enter the minimum time between page views to treat as returning user (in seconds).
6. Enter the time to wait until aggregation is complete when stopping the service (in seconds).

The screenshot shows the EPiServer CMS 5 administration interface. The top navigation bar includes 'Admin', 'Config', and 'Page Type'. The left sidebar lists various administrative tasks under 'Admin' and 'Tools'. The main content area is titled 'CMO Settings' and 'Settings page for EPiServer CMO.'. It features a 'Save' button and a 'Cancel' button. The 'Data Aggregation' tab is selected, showing settings for running aggregation on service start, data aggregation interval (10 minutes), user number to process at once (1000), maximum idle time (30 minutes), minimal time between page views (300 seconds), and time to wait until aggregation is complete (30 seconds). A note states: '\* Changes will take effect when next aggregation starts.'

## Security

Enter the role groups that have CMO administrator access rights in the **CMO administrator role groups** field and the user role groups in the CMO User role groups fields. Note that the specified groups must have access to Edit mode. See "Access Rights in EPiServer CMO" on page 6.

The screenshot shows the EPiServer CMS 5 administration interface with the 'Security' tab selected. The 'CMO administrator role groups' field contains 'WebAdmins, Administrators' and the 'CMO user role groups' field contains 'WebEditors'. A note states: 'Specified groups must have access to Edit mode.'

## Page Thumbnails

1. Enter the URL of the thumbnail service. This will generate the requested page thumbnails.
2. Select whether you want to authenticate the thumbnail service to the EPiServer CMS website by selecting the **Authenticate thumbnail service to the EPiServer CMS site** check box. Note that the credentials are required to build the thumbnails for the landing page variations in LPO.
3. Enter the login for the EPiServer CMS thumbnail service.
4. Enter the password for the EPiServer CMS thumbnail service.
5. Enter the default page for the thumbnail path.

**EPiSERVER CMS5** You are logged in as: hoppo [Log out](#)

**CMO Settings**  
Settings page for EPiServer CMO.

[Save](#) [Cancel](#)

[General Settings](#) [Data Aggregation](#) [Security](#) **[Page Thumbnails](#)** [Live Monitor](#)

Thumbnail service URL (generates requested page thumbnails)

Authenticate thumbnail service to the EPiServer CMS site \* ☐

Thumbnail service EPiServer CMS login

Thumbnail service EPiServer CMS password

Default page thumbnail path

\* The credentials are required to build the thumbnails for the landing page variations in LPO.

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## Live Monitor

Select how you want to handle the EPiTrace statistics injection option:

- Don't inject script anywhere.
- Inject script on active campaign pages only.
- Inject script on all site pages.

**EPiSERVER CMS5** You are logged in as: hoppo [Log out](#)

**CMO Settings**  
Settings page for EPiServer CMO.

[Save](#) [Cancel](#)

[General Settings](#) [Data Aggregation](#) [Security](#) [Page Thumbnails](#) **[Live Monitor](#)**

EPiTrace statistics script injection option

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# Glossary

## C

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**conversion page**

Page that represents the business result, shown when the visitor has completed the desired action.

**conversion path**

Conversion path monitors the users' conversion rates between predefined web pages. You can use the conversion path function to reach a deeper understanding of your web visitors' behavior to optimize the website and achieve better results

## K

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**key performance indicators**

Key Performance Indicators (KPI) give you the possibility to define and measure different predefined actions on the web pages.

**kpi entity**

The entity or value of the KPI is set to count the profit of the investment or effort.

## L

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**live monitor**

Live Monitor gives you a real-time view of visitors to the campaign pages on the website including the originating source information of your visitors.

## O

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**original page**

Page that is to be optimized. Original pages contain an action that a visitor can take, for example download, register or link to another page. Often referred to as landing page.

## T

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**target page**

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

## V

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**variation page**

A variation of the original page in either format or layout. The variation page must offer the same action as the original page.

**visitor**

A visitor to the website.

