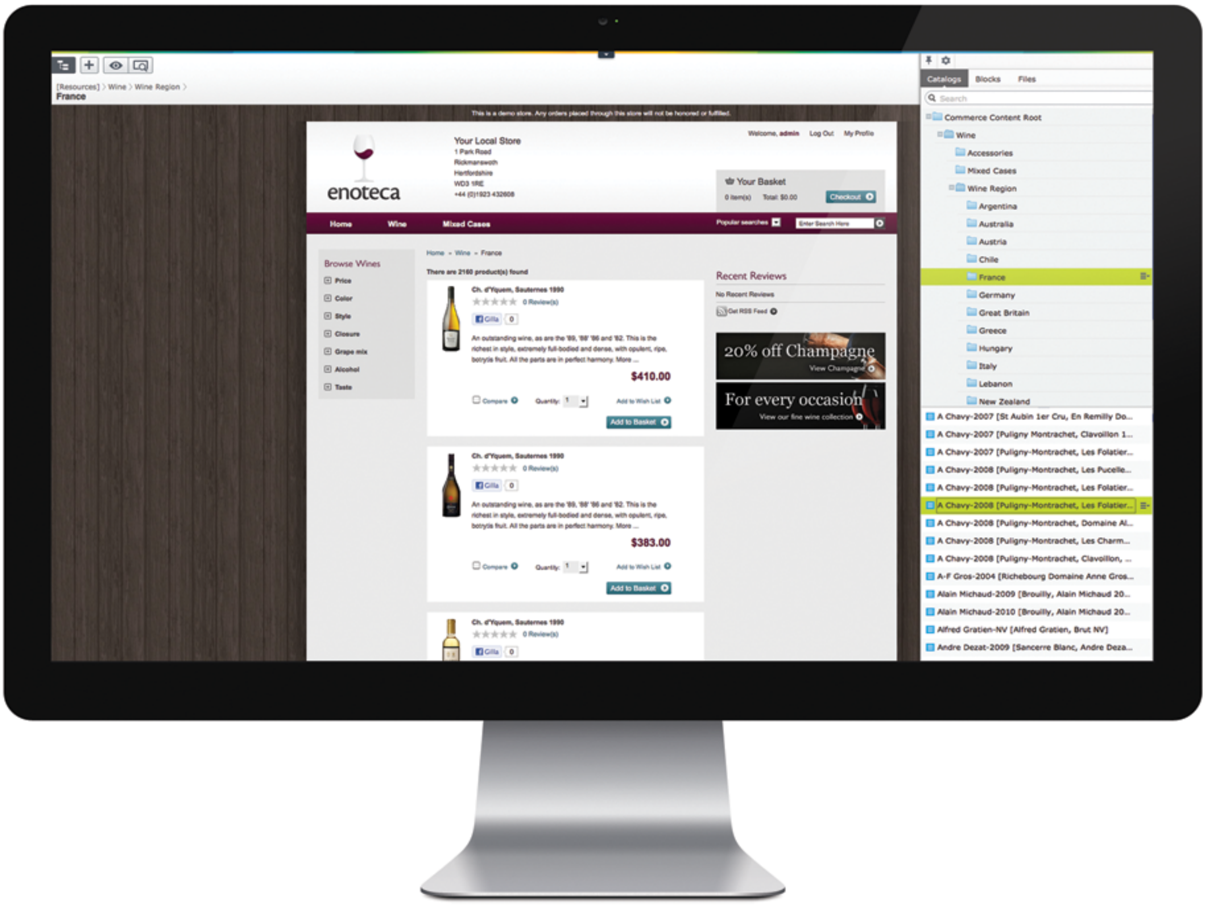
EPiSERVER 7

# CMO




# User Guide

User Guide – EPiServer 7 CMO

Revision A, 2012

# Table of Contents

# Introduction

EPiServer CMO Campaign Monitor and Optimization is a module integrated with EPiServer CMS to optimize your landing pages. You can also use EPiServer CMO to monitor and analyze how your online campaigns are performing.

## About EPiServer CMO User Documentation

This documentation is intended for staff working with marketing, who will administer as well as monitor campaigns and tests on web pages edited in EPiServer CMS.

The described functions as well as the screen shot examples shown in this documentation are based on a standard installation. Treat any displayed data in the examples purely for illustration purposes.

Screen shot examples as well as glossary links are only displayed in English.

## Accessing EPiServer Help System

You can access the web help from the Global Menu. Click the **?** icon and select the system for which you want to view the help. Browse or search for the topic where you need guidance.

You can also access the web help by browsing to *EPiServer Web Help*.

From each view in the user interface with a help icon provided, click the icon to get context-sensitive help.

## Online Community on EPiServer World

*EPiServer World* is an online community where you can find the latest product information. It is open to the public, for partners, customers, and everyone working with EPiServer products, such as editors, webmasters, site owners and developers. Here you can download material, participate in discussions, read articles, receive support and much more. Feel free to sign up as a member.

## Copyright Notice

# About EPiServer CMO

EPiServer Campaign Monitor and Optimization (CMO) is a module integrated with EPiServer CMS to receive an instant answer on how your campaigns are performing and which landing pages deliver the best results. You do not need any technical skills and can easily test and analyze the results yourself.

**Measuring and Optimizing 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 CMO you can easily measure and monitor online campaigns and optimize your landing pages.

## Access Rights

The roles in EPiServer CMO are 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 more information about the groups WedAdmins and WebEditors, refer to the *EPiServer CMS Administrator's Manual*.

Briefly the CMO User has the same access rights as the CMO Admin, except for adding, changing and deleting A/B tests.

The roles are used in EPiServer CMO have access rights to the following:

| Access Rights in A/B Tests | 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 | 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 |

## Work Procedure in EPiServer CMO

You can use the following tools in EPiServer CMO:

- *Landing Page Optimizer (A/B Test)*
- *Campaign Monitor*

The work procedure in EPiServer CMO is as follows:

1. Create the pages in EPiServer CMS to use in the A/B test.
2. Create and start the A/B test in EPiServer CMO.
3. Select the winning page in the A/B test.

4. Start your online campaign (preferably based on the winning page).
5. Analyze the results through campaign reports.

For a quick guide about how to create optimized campaigns in a few steps, see the article on EPiServer World *Measure Your Online Campaigns by Using KPIs in EPiServer CMO*.

# Getting Started with EPiServer CMO

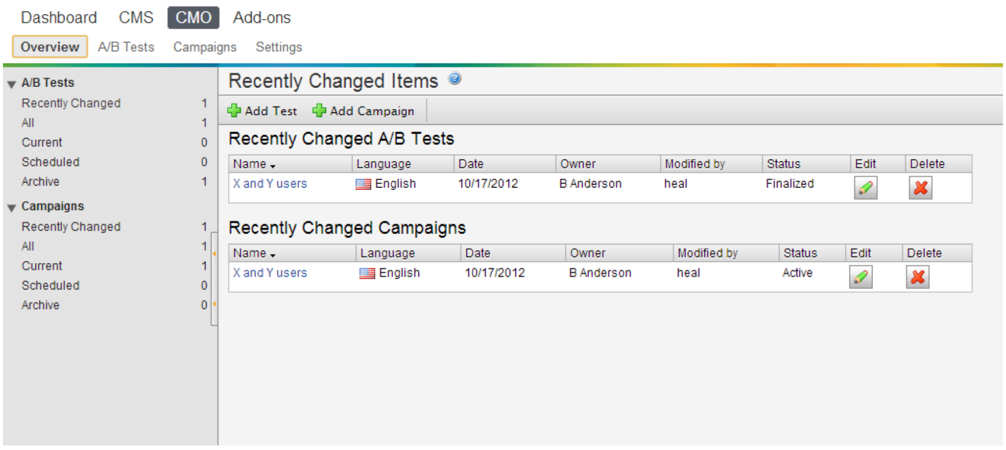
## Logging In

Log in to your website with your EPiServer CMS username and password, and open EPiServer CMO in one of the following ways:

- **From EPiServer CMS in View Mode**. Right-click and select **CMO**.
- **From EPiServer CMS in Edit Mode**. Click **CMO** in the top menu.
- **Directly from the URL**. Type the domain address of your website in the web browser and complement with the alias specified in the installation. Press ENTER and EPiServer CMO will open in a new window. Login with your regular EPiServer CMS login credentials.

The **Start** menu is where you access EPiServer OnlineCenter dashboard.

### Start Menu




By clicking **CMO** you can access the following menu:

- **Overview** shows an overview of all A/B tests and campaigns as well as their status.
- **A/B Tests** shows an overview of all A/B tests and their status. Here you can add a new test, see *About the Landing Page Optimizer*.
- **Campaigns** show an overview of all campaigns and their status. Here you can add a new campaign, see *About the Campaign Monitor*.
- **Settings** is where you make your settings in EPiServer CMO, see *Administering EPiServer CMO*.

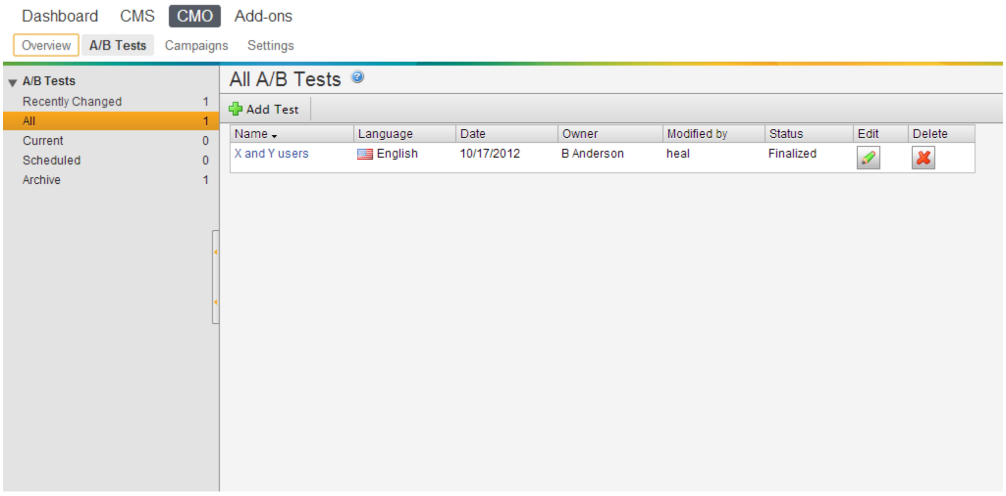
### Generic Functions in EPiServer CMO

The following functions are commonly used in EPiServer CMO:

| | | |
|---|---|---|
| | Add | Click to add, for example, a web page in a Campaign or an A/B test. |
| | Save | Click to save a Campaign or an A/B test. |
| | Edit | Click to edit a Campaign or an A/B test. This button is dimmed for finalized and archived campaigns or tests. |
| | Cancel | Click to cancel changes of a Campaign or an A/B test. |
| | Start | Click to start a Campaign or an A/B test that has been scheduled later or stopped. |

| | |
|---|---|
| | This button is dimmed during an active campaign or test, as well as for these that are finalized and archived. |
| Stop | Click to stop (pause) a Campaign or an A/B test. |
| Delete | Click to delete a Campaign or an A/B test. |
| Browse | Click to select a file, web page or date in the calendar. |
| Export | Click to export a Campaign or an A/B test to a Microsoft Excel data sheet. |
| Print | Click to print a Campaign or an A/B test. |
| Refresh | Click to refresh the thumbnails of displayed pages in a Campaign or an A/B test. |
| Archive | Click to archive a Campaign or an A/B test that has been stopped. Note that this action cannot be undone. |

# About the Landing Page Optimizer (A/B Test)




Landing Page Optimizer is used to test different versions of a web page. The method is established on the market as A/B testing, which is based on three landing pages, one published original page and two unpublished versions of the original page. The test is performed against a conversion page, which is the target page of a desired action, for example, a message that is shown to the user after posting a web form. The impressions are the number of visitors that have entered one of the landing pages.

During an A/B test, visitors to the website will either see the original page or a version of the page, and performance will be measured to determine which version of the page that result in most people taking the desired action. It is possible to limit the percentage of visitors that will be included in the test, be aware of that fewer visitors will require longer test period to give meaningful results, see *Adding an A/B Test*.

EPiServer CMO calculates the effectiveness of each page to meet the goal in different test results. The goal of the A/B test is to find the “best” page, which leads to more people taking the desired action to reach the conversion page. After the test has been completed and a winner has been selected, the “winning” page will be published for all visitors and the other versions of the page disabled.

## Testing Web Pages Created in EPiServer CMS

As EPiServer CMO is a module to EPiServer CMS, all of the pages involved in the A/B test must first be created in the EPiServer CMS editorial interface.

### Recommendations for Usage

An A/B test is not intended to last for longer periods of time. Keep the test period as short as possible, from a few days to a maximum of four weeks depending on the application. You can also finalize the test earlier by selecting a winner as soon as test results have been presented and the probable winner can be appointed.

Consider the following when you start an A/B test:

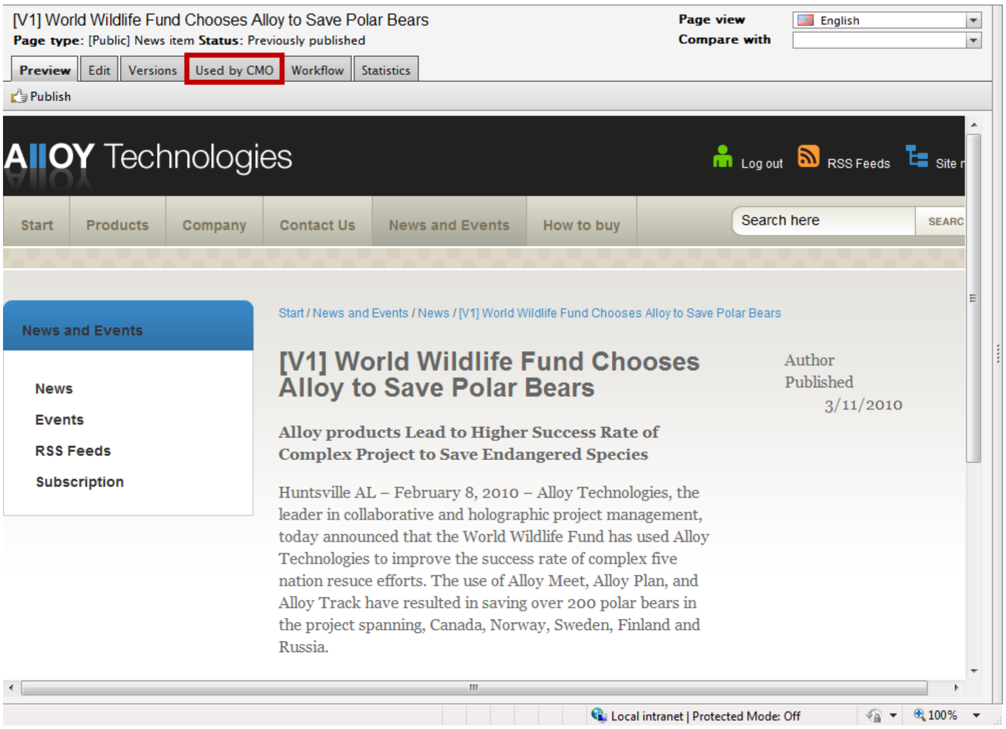
- Use an original page, two versions of the original page, and a conversion page in an A/B test.
- Ensure that the original page is the version that has status **Published Version** in EPiServer CMS.
- Ensure that the versions offer the same action as the original page. The versions can contain different text content and layout than the original page. The versions can have status **Not Ready** (Checked Out) or **Ready to Publish** (Checked In) in EPiServer CMS.

- Use the conversion page to be shown when the visitor has carried out the desired action. Ensure that the conversion page is not visible in the navigation menu of your website. Only users included in the test are supposed to reach it from any of the landing pages.

### How an A/B Test Is Shown in EPiServer CMS

When a page is included in an active A/B test, the tab **Used by CMO** will appear in the editorial interface for that page.

> ***Note*** The **Used by CMO** tab is only shown if you run EPiServer CMS in legacy mode.



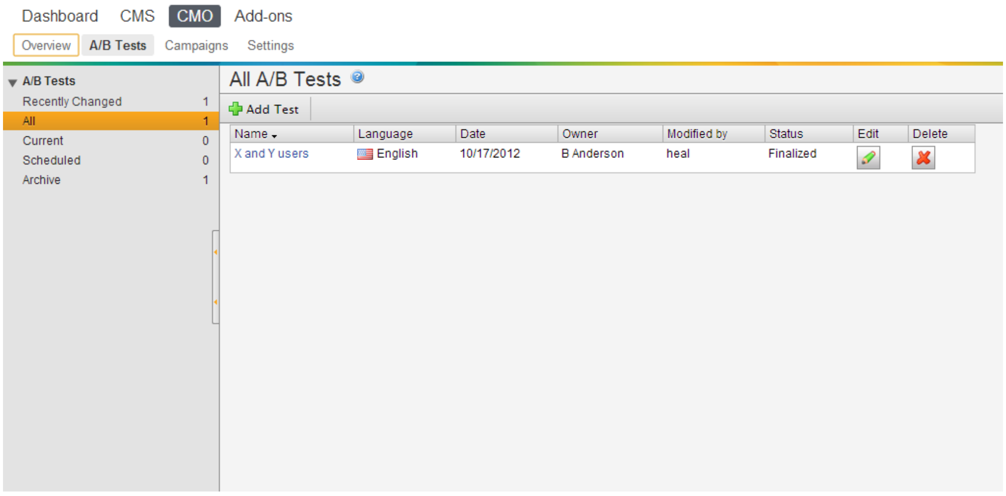

> When the original page and its versions has been included in an A/B test, do not change or remove them in EPiServer CMS editorial interface during the test! If you do, it cannot be undone. The test will “break” and you will need to start over with the test.

## A/B Test Status

An A/B test can have any of the following statuses:

- **Active**. Tests that are currently running. If you create a test with start date set to today’s date, 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, either stopped manually or reached the end date. Statistics are no longer collected. See *Changing an A/B Test*.
- **Finalized**. Tests with status finalized have an expired end date.

# Overview of All A/B Tests




In EPiServer CMO several tests can be performed at the same time for various purposes.

To access the overview of all A/B tests, go to the **A/B Tests** menu. The A/B tests are listed in the left menu as follows:

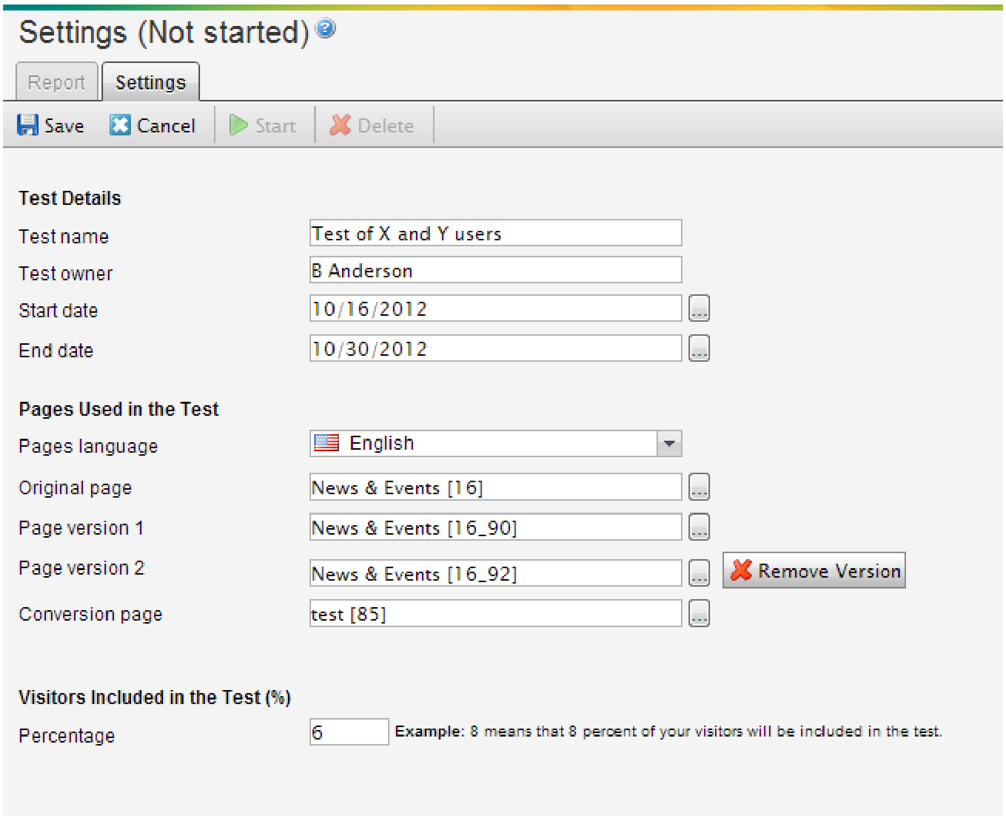
- **Recently Changed**. Tests that recently have been changed according to the value in *General settings*.
- **All**. All tests that have been created within EPiServer CMO. Here you will find tests with status **Active**, **Finalized**, **Not Started** and **Stopped**.
- **Current**. Tests that are not finalized. Here you will find tests with status **Active** and **Stopped**.
- **Scheduled**. Tests that have been created, but scheduled to be performed in the future. Here you will find tests with status **Not started**.
- **Archive**. Tests that have been finalized. Here you will find tests with status **Finalized**.

## Add, Change and Delete

Under these listings you have the following options:

- *Add a test*, click **Add Test**.
- *Change a test*, click **Edit**.
- *Delete a test*, click **Delete**.

# Adding an A/B Test




Add an A/B test as follows:

1. In **Overview**, click **Add Test**.
2. In **Test name**, type the name of the test. Choose a meaningful name that will help you easily distinguish between many tests.
3. In **Test owner**, type the name of the person who is responsible for the test.
4. Browse and select a start date and end date for the test. You can schedule a test to start in the future. If you leave the current date suggested by default, the test will start immediately after saving the test. The start date can be changed up until the test has been activated. The end date can only be changed on stopped tests.
5. In **Select language**, select the language you want to use for the test. Available languages are the ones that have been activated in EPiServer CMS.
6. In **Original page**, browse and select a published version of the original page to use in the A/B test from the website.The page name and ID is displayed.
7. In **Version page**, browse and select an unpublished page version of the original page. Add a second version page by clicking **Add Version** and browsing. An A/B test must contain at least one version page, and can contain maximum two version pages.
8. In **Conversion page**, browse and select a conversion page on the website. You can have one or several numbers of pages between the landing pages and the conversion page. A conversion page can only be used in one active A/B test.
9. In **Percentage**, type a percentage value of how much of the traffic you want to be included in the test. If you type “80”, only 80 percent of your visitors will be included in the test. 20 percent of the visitors

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. A high percentage is important if you will have a short test period.

10. Click **Save** to save the test. The test will appear under **Current** if it had a scheduled start date today, or under **Scheduled** if the start date was scheduled for the future.

> You can edit all A/B test settings until the test has been started. Note that A/B tests can only be created by CMO Admin, see *Access Rights*.

For more information about original page, version page and conversion page, see *About the Landing Page Optimizer*.

To edit and stop an ongoing A/B test, see *Changing an A/B Test*.

# Changing an Existing A/B Test

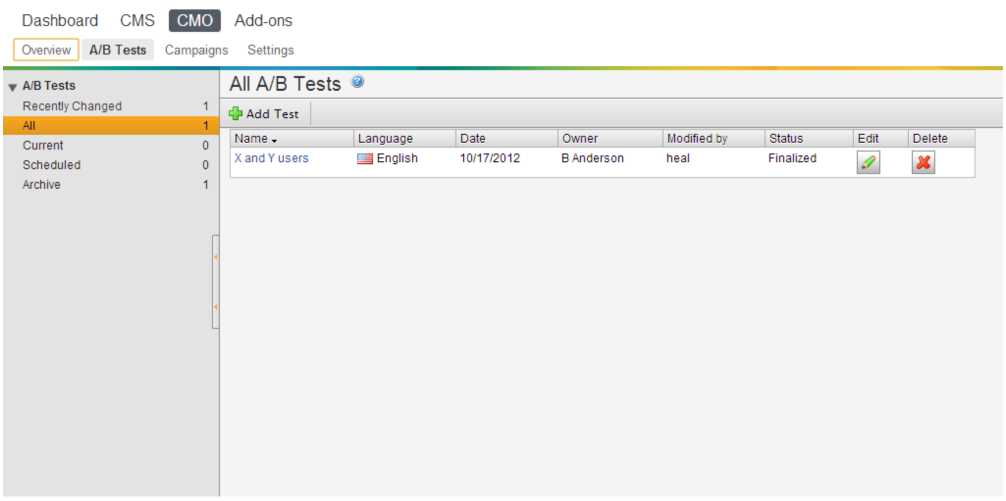
You can change an existing A/B test that has the status **Active**. For example, a test that was stopped manually can be restarted, or a test that has expired can be prolonged.

You can change an A/B test as follows:

- Click **Stop**. The test will stop immediately. You can either restart the test or select a winner, see *Finalizing an A/B Test*.
- Change the settings for the A/B test and click **Save**. You can change the following settings:
  - Test name
  - End date
  - Percentage of visitors included in the test
- Click **Start** on a test that has been stopped. By clicking **Start** again, you can restart the test and the test data will be restored.

> When the original page and its versions has been included in an A/B test, do not change or remove them in EPiServer CMS editorial interface during the test! If you do, it cannot be undone. The test will “break” and you will need to start over with the test.

# Deleting an A/B Test

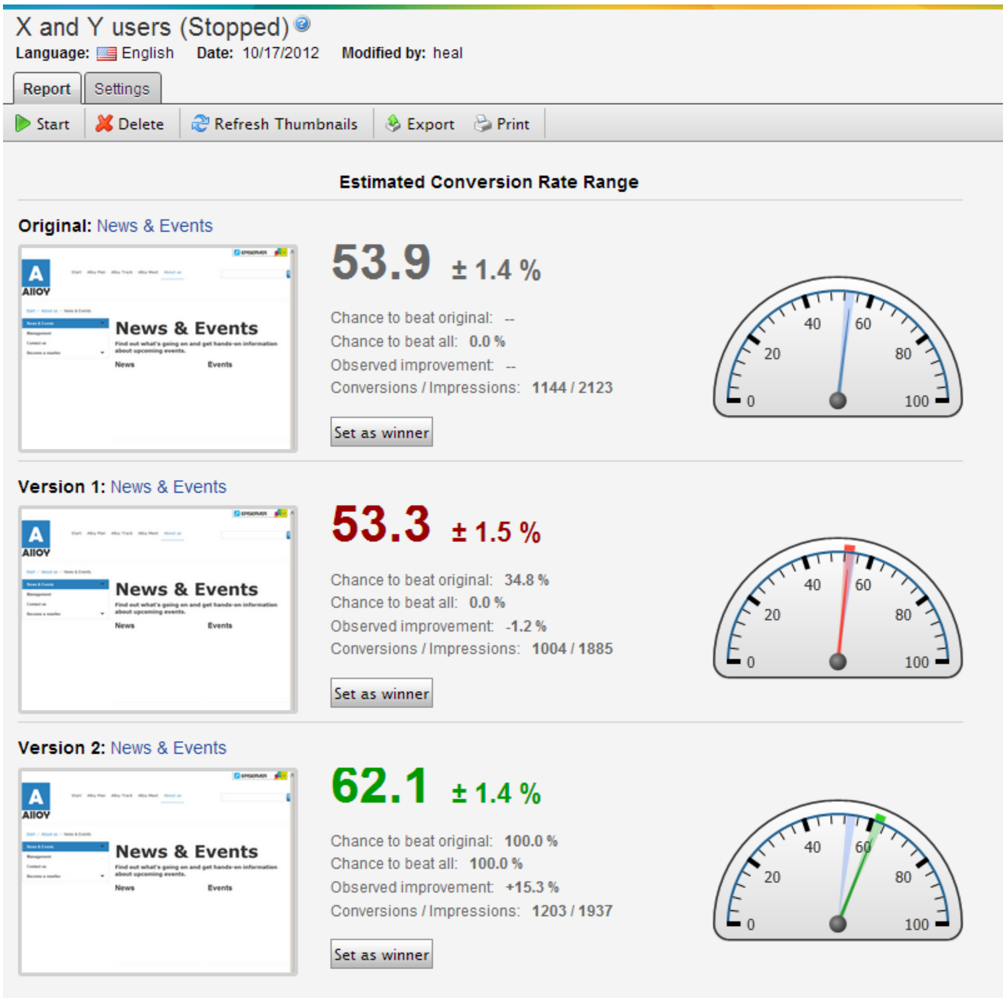



Delete an existing A/B test as follows:

1. Go to **A/B Tests** > **All** and select the test you want to delete.
2. Click **Delete**. The test will immediately be deleted. No test data will be restored.

> When the original page and its versions has been included in an A/B test, do not change or remove them in EPiServer CMS editorial interface during the test! If you do, it cannot be undone. The test will "break" and you will need to start over with the test.

# Finalizing an A/B Test




When the test period for the A/B test is over, you need to decide if the original page or one of the versions is the winner. You have the following options:

- Select the winner after the end date has expired
- Stop the test manually and select a winner (this is useful if the test has given an adequate test result over a shorter period of time than scheduled)

To follow the progress of the test and select the winner, go to **A/B Tests** > **Report** tab.

When you select the winner, that version of the page will change automatically to **Published Version** in EPiServer CMS, and the other versions that were included in the test will not be shown to the visitors. However, you can find all the different versions in the version list in Edit mode.

The test will also change status to **Finalized** and will be moved to **Archive**.

Note that when you select a web page as a winner, this action cannot be undone. It also means that you cannot make any more changes in the A/B test, and the test cannot be restarted.

### Selecting the Winner after the End Date Has Expired

Select the winner of the A/B test as follows:

1. Click **Set as Winner** under the thumbnail of the web page you want to be the winner of the A/B test. The web page status will be changed to **Test Winner**.

### Stopping the A/B Test Manually and Selecting Winner

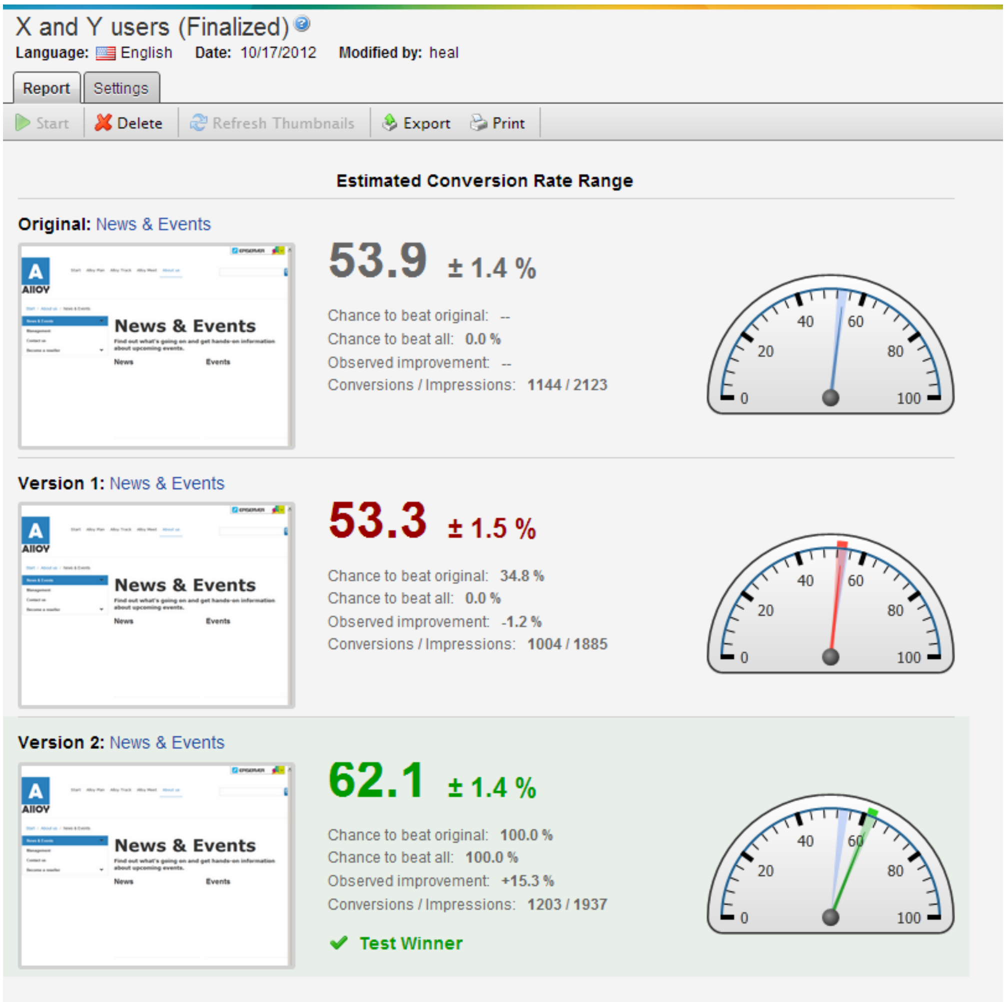
Finalize the A/B test manually and select winner as follows:

1. Click **Stop** to stop the test.
2. Click **Set as Winner** under the thumbnail of the web page you want to be the winner of the A/B test. The web page status will be changed to **Test Winner**.

After you have selected the winner you can export or print the results, see *Exporting or Printing an A/B Test*.

For more information about how to handle the results, see *Handling and Analyzing the Result of a Performed A/B Test*.

## Analyzing the Results of a Performed A/B Test



As an A/B test is proceeding, you will receive indications and statistics presented on how the different versions of a page have been used by the visitors compared to the original page. Based on the statistics, you can decide which page version to publish, or maybe the original page is the most effective. As the test proceeds, the gap between the colored indicators usually decreases.

Example, the statistics of the winning page indicates the following:

- **30.8 ± 5.2 %** The test has now reached 30.8 percent, and is expected to reach approximately 5.2 percent more or less when the test period is over.
- **Chance To Beat Original: 100.0 %** There is no doubt that the winning page (version 2) will be more successful than the original page.
- **Chance To Beat All: 84.7 %** There is approximately 84.7 percent chance that the winning page will be more successful than the original page and version 1.
- **Observed Improvement: +207.7** The winning page has reached approximately improved 207.7 percent better number of conversions than the original.
- **Conversions / Impressions: 40 / 130** Version 1 is the winning page as it has the highest number of conversions, for example, posted a product order form. The number of impressions refers to the number of visitors to the page, and the number of conversions refers to the number of visitors that reached the conversion page.

## About How the Statistics Are Calculated

The statistics in an A/B test are calculated as follows:

### 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. The range +/– is a probability calculation based on the number of conversions/impressions, showing the most likely result for each version 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 and impressions increases during the test.

### Chance to Beat Original

The “chance to beat original” shows the probability that the conversion rate of a combination will be more successful than 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.

### Chance to Beat All

The “chance to beat all” shows 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 percent, 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. You are recommended to only focus on the observed improvement when a large amount of data has been collected and it can be considered more reliable.

### Conversions / Impressions

Shows how many people who have taken the desired action and the number of people included in the test. If the result is 5000/12000, it means that 5.000 of total 12.000 visitors that have viewed the page have taken the desired action.

# Exporting or Printing the A/B Test Results

When the A/B test is running or finalized, you have the following options:

- Export the test results to Microsoft Excel to continue working with the statistics
- Print the test results

See also *Handling and Analyzing the Results of a Performed A/B Test*.

## Exporting Test Results

Export the test results to Microsoft Excel as follows:

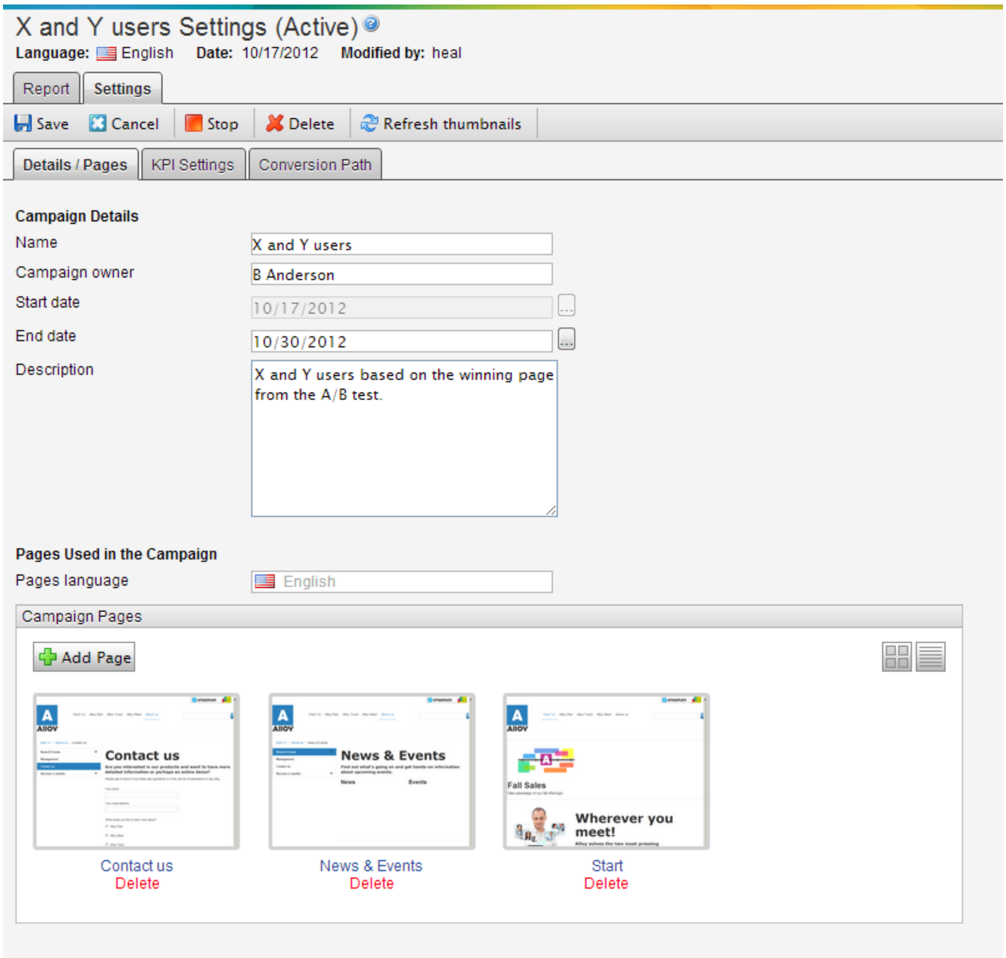
1. Select the test you want to export.
2. Click **Export**.
3. Select **Open** if you want to open the file directly in Microsoft Excel, or **Save** to save the results in Microsoft Excel file format.

## Printing Test Results

Print the test results as follows:

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

# About Campaign Monitor (CM)




Campaign Monitor (CM) is an intuitive, graphical dashboard that shows you in real-time how your campaigns are performing.You can plan and budget for an estimated KPI value for the campaign period and monitor the result in real-time. CM 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 by the following tabs:

- **Settings**. Here you enter information about the campaign and the expected result, see *About the Campaign Settings Tab*.
- **Report**. Here you can view, print and export the campaign results, see *About the Campaign Report Tab*.

## Monitoring Campaign Web Pages Created in EPiServer CMS

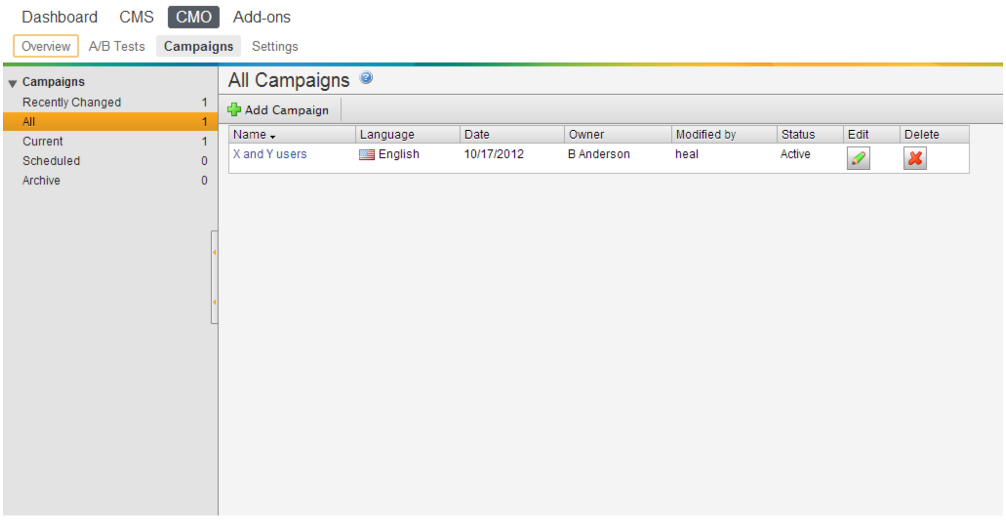
As EPiServer CMO is a module integrated with EPiServer CMS, all of the pages involved in the campaign monitor must first be created in the corresponding EPiServer CMS website. The campaign monitor collects statistics from selected EPiServer CMS pages that have been included in the campaign.

If you have a website and want to monitor web pages in different languages, create one campaign for each language version to use the statistics for comparison.

# Recommendations for Usage

The campaign monitor is not intended to replace a web statistics tool, where all your pages will be included in a campaign and the campaign period is very long. Our recommendation is that a campaign includes up to approximately 50 pages and that the period of an active campaign is up to two months.

# Overview of All Campaigns




In EPiServer CMO several campaigns can be performed at the same time for various purposes.

To access the overview of all campaigns, go to the **Campaigns** menu. The campaigns are listed in the left menu as follows:

- **Recently Changed**. Campaigns that recently have been changed. To set the value for how long time changes are to be treated as new, see *Administering General Settings*.
- **All Campaigns**. All campaigns that have been created within EPiServer CMO. Here you will find campaigns with status **Active**, **Finalized**, **Not Started** and **Stopped**.
- **Current**. Campaigns that are not finalized. Here you will find campaigns with status **Active** and **Stopped**.
- **Scheduled**. Campaigns that have been created but are scheduled to be performed in the future. Here you will find campaigns with status **Not started**.
- **Archive**. Campaigns that have been finalized. Here you will find campaigns with status **Finalized**.

## Add, Change and Delete

Under these listings you have the following options:

- *Add a campaign*, click **Add Campaign**.
- *Change a campaign*, click **Edit**.
- *Delete a campaign*, click **Delete**.

# 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. For example, you can set KPI values on the following actions:

- Form postings
- Page visits
- Download of files
- Incoming traffic to a page from a specific URL (to track users from specific websites)
- Clicks on banner ads

A web page can have more than one KPI defined.

> Focus on some kind of action you want the user to perform on the target page during the campaign. If you want the user to sign up to a conference, a form posting can be used as a KPI.

## KPI Types

When you define a campaign, you can use the following KPI types (depending on the action you want to measure):

### Page Views

The Page Views KPI is based on pages in the campaign. It is used to measure a general page visit and can also be used when the page is shown only when users perform an action on the website, for example, a “Thank You” page after posting a web form or a confirmation page after placing an order.

### HTTP Referrers

The HTTP Referrers KPI is based on pages in the campaign. It 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. See the following examples:

- **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.
- **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.
- **Example 3: http://www.google.se/preferences?hl=sv**. KPI will be calculated only for the traffic from the absolute URL specified.

### Forms

The **Forms KPI** is is based on pages in the campaign. It is used to measure when a visitor posts a web form. One page can contain several web forms, and you need to define which one is to be connected to the specific KPI you are creating.

### Downloads

The **Downloads KPI** is is based on pages in the campaign. It is used to measure the number of downloads the users are doing from a web page, and you need to define which file is to be connected to the specific KPI you are creating.

### Conversion Paths

The **Conversion KPI** is general and based on the entire campaign. It is used to measure how many visitors reached the target page.

### Generic

The **Generic KPI** is general and based on the entire campaign. It gives you the opportunity to integrate EPiServer CMO with any external application or function based on data through a Web Service API from any external data source that are used in, for example, EPiServer Commerce, or partner-developed functions. To set up connections for a specific ID to the data source integrated with EPiServer CMO, see *Administering External Applications Settings*.

### KPI Entity or Value

The KPI entity is used in a KPI value to estimate how much a desired action is worth. You can use the following entities and values:

- Points
- £ (British Pounds)
- € (Euro)
- $ (Dollars)
- Kr (Swedish, Danish or Norwegian Kronor)

### How to Set a KPI Value for Measuring the Success of your Campaign

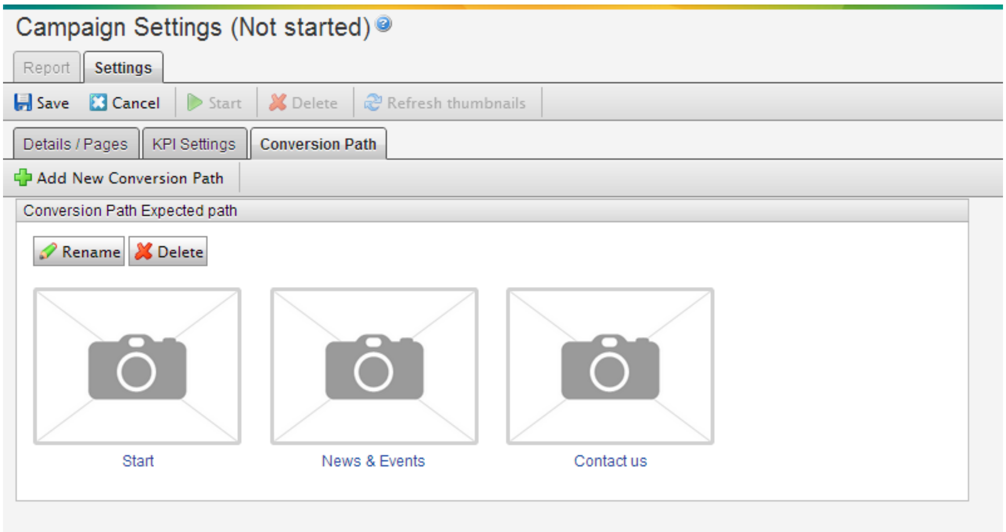
Consider the following when you make KPI settings:

- **KPI value**. How much is the desired action worth (for example, form posting), 100 points or 50 dollars?
- **Expected value**. How many actions is the goal for the campaign period, 1.000? Expected value is 50.000 dollars or 100.000 points.

Example:

If your sales team can complete the sale with 10 percent of people who request to be contacted, and your average transaction is 5 000 SEK (Swedish Krona), you can assign the “Contact Me” 500 SEK (in this case 10 percent of 5 000 SEK). On the other hand, if only 1 percent of the alerts for a mailing list leads to a sale, you can only assign the “Registration for the mailing list” of 50 SEK.

## About Conversion Paths




Conversion paths is used to monitor the conversion rates between predefined web pages in your campaign. A conversion path measures how many visitors navigate from the landing pages to the target page, and by analyzing that you can gain a deeper understanding of their behavior to optimize the website and achieve better results. The conversion paths will show the following:

- How many visitors that have actually reached the target page
- Where and how many of the visitors have exited the path and not reached the target page
- Where and how many of the visitors have re-entered the path

**How Many Visitors Reached the Target Page?**

You can assign any page as a target page on the website, for example, a specific article or a news page. Based on this information you can choose to make the page clearer and more efficient to quickly lead the visitors to the target page, where they can buy an article and put it in a shopping cart etc.

You can have more than one path per campaign.

# About the Campaign Settings Tab

To create a statistics report for a campaign, go to the **Settings** menu, which contains the following tabs:

- **Details / Pages** contains the information about the campaign, such as start date and end date, and which pages are included.
- **KPI Settings** give you the possibility to define and measure different predefined actions on the web pages in market value or points. 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. Refer to *About Key Performance Indicators*.
- **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. Refer to *About Conversion Paths*.

About how to enter information under the **Settings** tab, see *Adding a Campaign*.

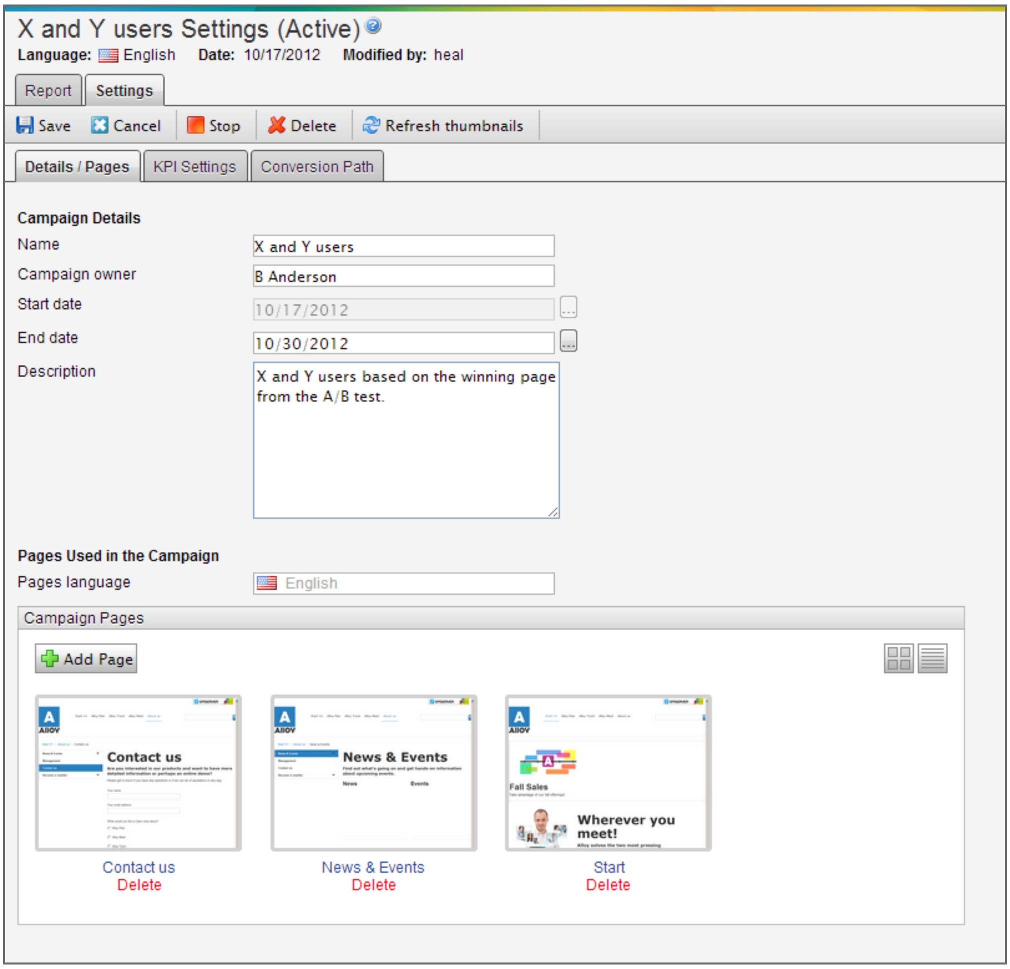
## Changing View of the Campaign Pages

To change view of the web pages included in your campaign, you have the following options:

 View the web pages included in a campaign in thumbnails. Set by default.

 View the web pages included in a campaign in as a list.

## Adding a Campaign




A campaign can include both KPIs and conversion paths or each of them separately.

To create a campaign, go to **Campaigns** > **Add campaign** > **Settings**.

To edit and stop and an ongoing campaign, see *Changing a Campaign*.

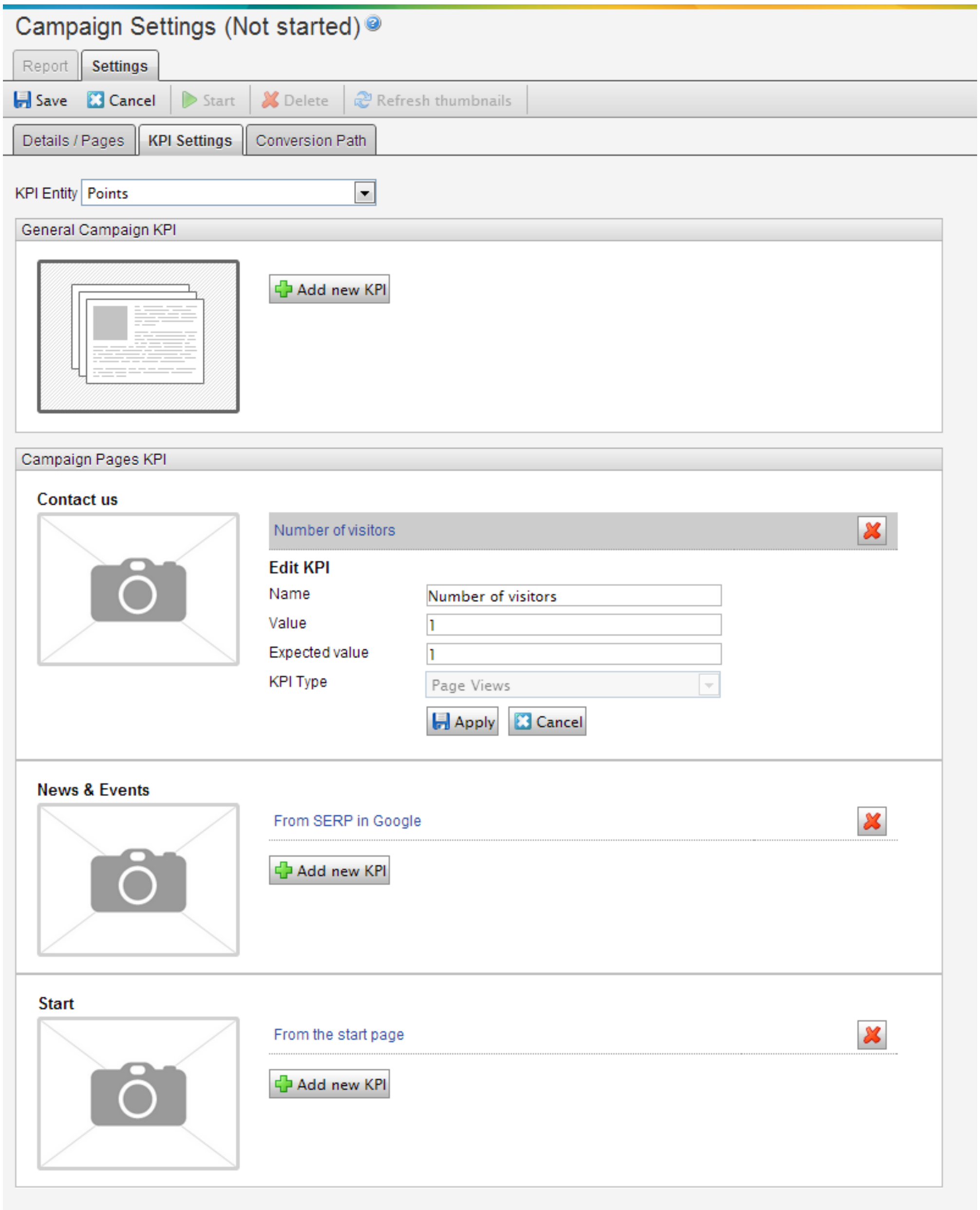
### Step 1: Details / Pages

All new campaigns need to contain campaign details and a definition of the pages included. Add the details as follows:

1. In **Select Language**, select the language you want to use for the campaign. Available languages are the ones that have been activated in EPiServer CMO. You have the following options:
    - Select a language, and this will only include the pages on the language you selected. If you want to compare pages in different languages, you need to create one campaign for each language.
    - Select **All languages**, and this will include all pages no matter of which language you have included in your campaign.
2. In **Name**, type the name of the campaign. Choose a meaningful name that will help you easily distinguish between a large amount of campaigns.
3. In **Campaign Owner**, type the name of the owner of the campaign.

4. Browse and select a start date and end date for the campaign. You can schedule a campaign to start in the future. If you leave the current date suggested by default, the campaign will start immediately after saving your campaign. The start date can be changed up until the campaign has been activated. The end date can be changed during the campaign.
5. In **Description**, type a descriptive text about the campaign.
6. In **Selected Campaign Pages**, select the pages you want to include in the campaign by clicking **Add Page**. In **Select Page**, select the web pages on your site by using the arrows and clicking **OK**. The name and thumbnail of each page is displayed by default, and you can change to see your selected pages in a list view instead. You can also remove pages by clicking **Delete**.
7. Click **KPI Settings** or **Save** to activate the campaign. If you save the campaign, you can click **Refresh Thumbnails** to see your web pages.

### Step 2: KPI Settings



This step is optional. For more information about KPI Types and KPI Entity, see *About Key Performance Indicators*. Add one or several KPIs for each web page as follows:

1. In **KPI Entity**, select entity.
2. In **General Campaign KPI**, click **Add new KPI** to add campaign-based KPIs that measures your entire campaign. Proceed with the following settings:
    a. In **Name**, type the name of the KPI. Choose a meaningful name that will help you easily distinguish between a large amount of KPIs.
    b. In **Value**, type a value of how much one user action is worth in the campaign. Use full stop as separator if you want to use a value with decimals.
    c. In **Expected Value**, type an expected value for all user actions during the campaign period. The expected value must be greater than in **Value**. Use full stop as separator if you want to use a value with decimals.
    d. In **KPI Type**, select one of the following and enter information:
        - **Generic** > **External Application**, select the application name you want to add to your campaign. The name contains a specific ID for the data source in to identify the external application integrated with EPiServer CMO. To populate the list, see *Administering External Applications Settings*.
        - **Conversion Path** > **Conversion Path**, select the conversion page in your campaign.
    e. Click **Add** to save and connect the KPI to the web page.
3. In **Campaign Pages KPI**, click **Add new KPI** to add page-based KPIs that measures the pages included in your campaign. Proceed with the following settings:
    a. In **Name**, type the name of the KPI. Choose a meaningful name that will help you easily distinguish between a large amount of KPIs.
    b. In **Value**, type a value of how much one user action is worth in the campaign. Use full stop as separator if you want to use a value with decimals.
    c. In **Expected Value**, type an expected value for all user actions during the campaign period. The expected value must be greater than in **Value**. Use full stop as separator if you want to use a value with decimals.
    d. In **KPI Type**, select one of the following and enter information:
        - **Page Views**, will count the number of visits to the selected web pages in the campaign.
        - **HTTP Referrers** > **Referrer URL**, type the URL for the referrer, for example the search results on a keyword using a search engine.
        - **Form** > **Form name**, select the form to be added to the KPI (**Form name** will be populated by existing forms on the website). If you select **Enter manually**, type the form name manually, for example, a form that you have not created yet.
        - **Download** > **File URL**, type the URL for your download page, for example, a report or a file.
    e. Click **Add** to save and connect the KPI to the web page.

#### Saving the Campaign or Adding Conversion Paths

When you have added KPIs in your campaign, you have the following options:

- 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 the **Conversion Path** tab.

#### Step 3: Conversion Paths

This step is optional. For more information about conversion paths, see *About Conversion Paths*. Add one or several conversion paths for each campaign as follows:

1. Click the **Conversion Path** tab > **Add New Conversion Path**.
2. In **Conversion Path Name**, type the name of the conversion path. Choose a meaningful name that will help you easily distinguish between a large amount of conversion paths.
3. Select 2–4 pages in your campaign by using the arrows. You can also change the sort order by using the arrows.
4. Click **Create**.
5. Click **Save** to save and activate the campaign. Note that when you have activated your campaign, the conversion path pages and their sort order cannot be changed.

## Changing a Campaign

To change a campaign, select the campaign under **Campaign** > **Settings**. You can only change existing campaigns with the status **Active**.

In an ongoing campaign you can change the following information:

- Name
- End date (prolonging the campaign)
- Campaign owner
- Description

You can also add and remove campaign pages.

#### Changing KPI Settings

In an ongoing campaign you can change the following information:

- KPI Entity
- Add KPI for a web page by clicking the **Adding new KPI** button
- Delete KPI for a web page by clicking the **Delete** button

#### Changing Conversion Path

On the **Conversion Path** tab, you can add a new conversion path by clicking **Add New Conversion Path**.

In an ongoing campaign you can change the following information:

- Add new conversion path
- Delete conversion path

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

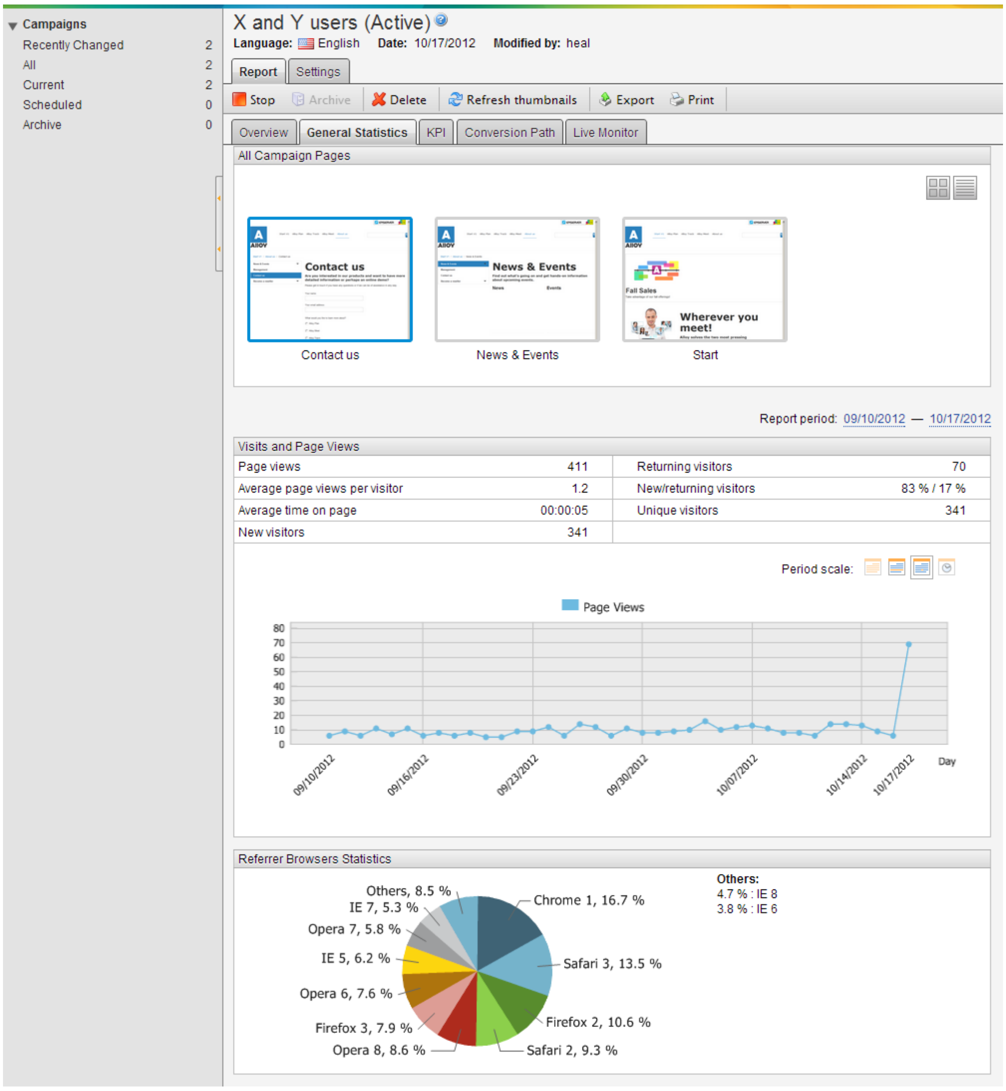
> Remember that your changes to an ongoing campaign can affect the result of the campaign as new parameters are added or removed.

## Deleting a Campaign

Delete an existing campaign as follows:

1. Go to **Campaigns** > **All** and select the campaign you want to delete.
2. Click **Delete**. The campaign will immediately be deleted. No test data will be restored.

# About the Campaign Report Tab

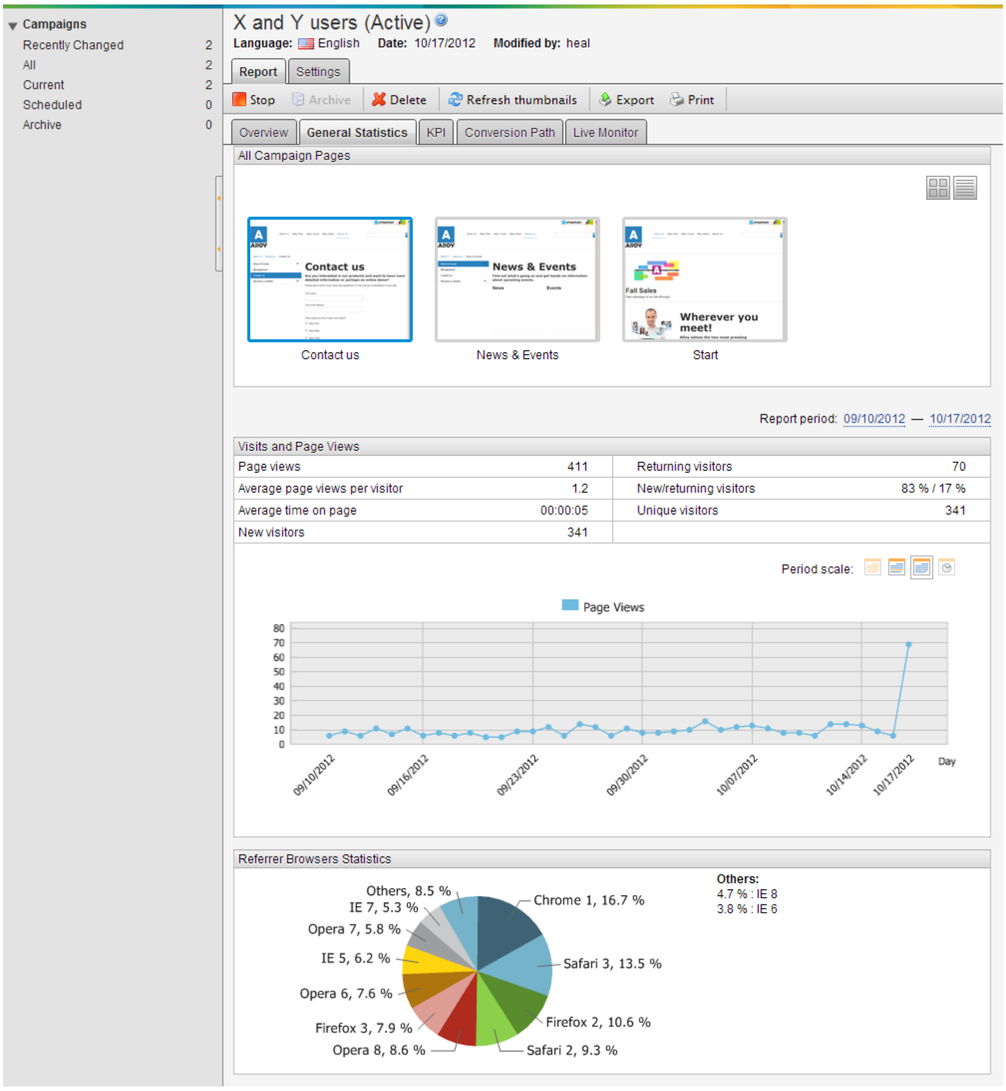



To create a statistics report for a campaign, go to the **Report** menu, which contains the following tabs:

- **Overview** gives you an overview about how the campaign is proceeding with the campaign details, general statistics for visits, referrers and a summary of the existing KPIs and conversion paths.
- **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 will always be collected and monitored for all pages in a campaign during the campaign period. Refer to *About General Statistics*.
- **KPI** is optional and will provide details about how many visitors that performed the desired action if you created KPIs under **Settings** > **KPI Settings**. Refer to *About Key Performance Indicators*.
- **Conversion Path** is optional and will provide details about the visitors' navigation to the conversion page if you created paths under **Settings** > **Conversion Paths**. Refer to *About Conversion Paths*.
- **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. Refer to About Live Monitor.

To export and print the report, see *Exporting or Printing Campaign Results*.

## 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. You can view all statistical parameters in a specified time span in the campaign scope. Statistical parameters are calculated per page, per campaign and per conversion path.

Proceed to view the report, as follows:

1. Click the page for which you want to view the statistics. The page will be highlighted after selection.
2. In **Report Period**, you can change campaign period by selecting start date or end date from the calendar.
3. In **Period Scale**, you can select how you want to view the statistic chart for page views, on a daily or hourly basis.

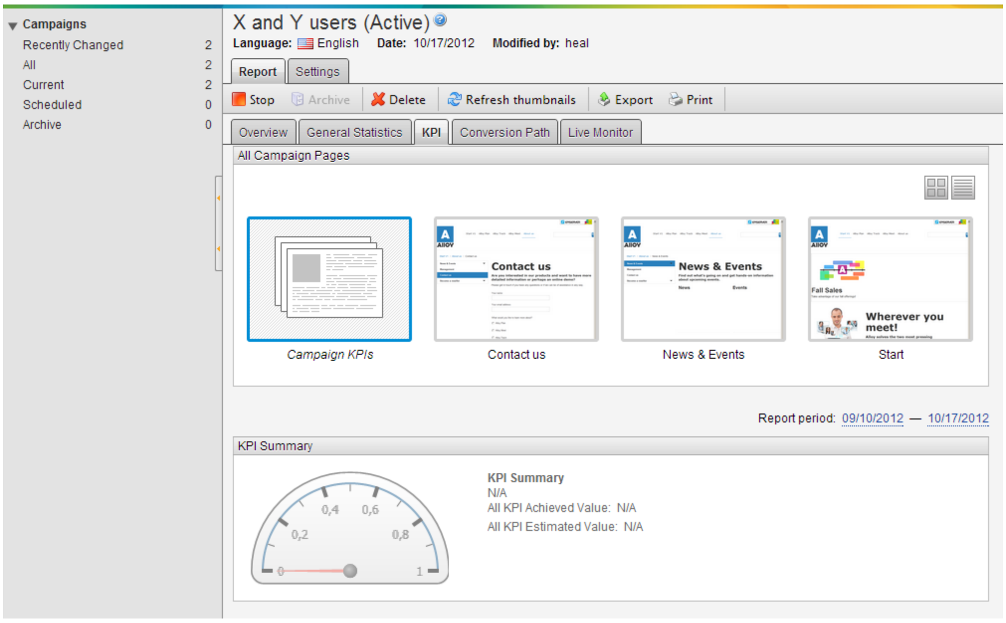
To export and print the report, see *Exporting or Printing Campaign Results*.

### How to Read the General Statistics

View the report as follows:

- **Page Views**. The number of page views is generated by every event when a user opens the web page.
- **Average Page Views Per Visitor**. The average number of pages each user has viewed.
- **Average Time on Page**. The average time in hours, minutes and seconds each user spent on this specific page.
- **New Visitors**. A user who will be treated as new when opening each page of the campaign for the first time.
- **Returning Visitors**. A user who has visited the same page more than once during the campaign.
- **New/Returning Visitors**. New and returning visitors compared in percent.
- **Unique Visitors**. The number of visitors with unique IP addresses. A returning user will be treated as one visitor.

## Detailed KPI Report



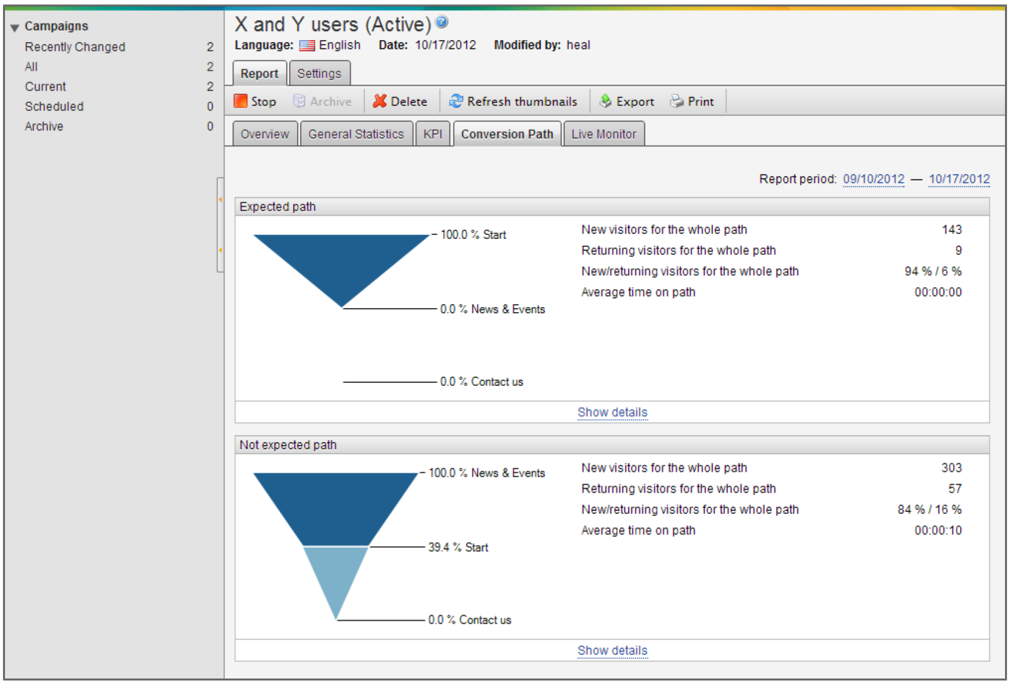

The KPI report shows detailed information about the results of the defined KPIs for specific pages in the campaign settings.

View the report as follows:

1. Click the 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.

To export and print the report, see *Exporting or Printing Campaign Results*.

## 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.

#### Changing Period for the Report

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

#### How to Read the Conversion Paths Statistics

##### Overview

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.

##### Show Details

Click **Show Details** to see how the visitors have been entering, passing and exiting the conversion path. View the report as follows:

### Visitors Entering the Path From

On the first level 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 the Path From

On the lower levels of the conversion path, you can see 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

On all levels you can 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.

To export and print the report, see *Exporting or Printing Campaign Results*.

# Exporting or Printing Campaign Results

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

You can export and print the following report types:

- Overview
- *General Statistics*
- *KPI*
- *Conversion Path*

For more information about the reports, see also *About the Campaign Report Tab*.

## Exporting 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 as follows:

1. Select the campaign you want to export.
2. Click **Export**.
3. Select **Open** if you want to open the file directly in Microsoft Excel, or **Save** to save the result in Microsoft Excel file format.

## Printing Campaign Results

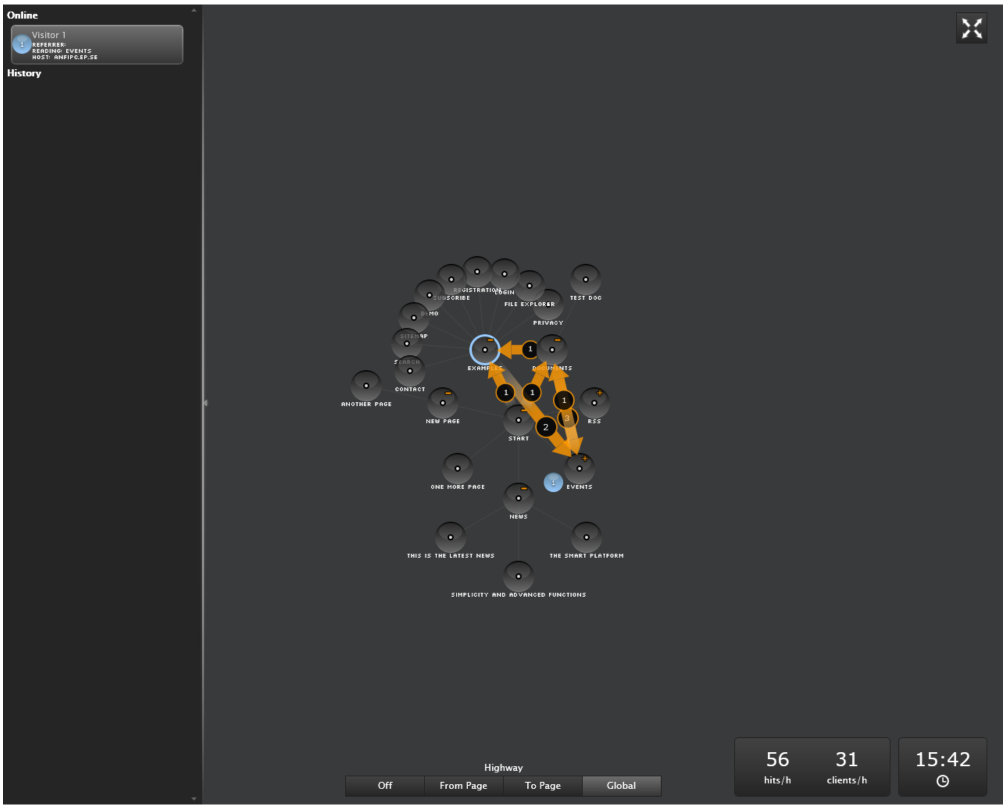
Print the campaign statistics as follows:

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

# Live Monitor

**Live Monitor** is used by EPiServer CMS to visualize the current traffic on the website. Live Monitor monitors the traffic to your website and follows the behavior of visitors, making your website activity easily available to the organization.

With Live Monitor you can see potential customers and partners that are visiting your website. Using "highways" you can analyze the traffic on your website and adapt the communication accordingly.




The Live Monitor user interface is designed to make it easy to see who is visiting your website right now. Clear real-time animations show you how each visitor navigates your website, where they came from and what pages they are visiting. Live Monitor can be viewed in full screen mode.

### Website Structure

The main part of the Live Monitor user interface shows the structure of the EPiServer CMS website. Click on the circles to expand the structure and see how many visitors are currently viewing a certain page that is stored deep in the structure of the website. Activity on the subpages in the website can be viewed by double-clicking the node (page) in question to expand (or collapse) the structure.

### Highways

A ”highway” is a common navigation track used on the website and is indicated in the user interface by an orange arrow. Highways make it easy to see how visitors choose to navigate your website and indicate how many visitors have chosen a particular route on the site.

It is possible to either view the highways for the entire site, so-called global highways, or to or from a certain part of the website. Global highways cover all the tracks navigated by visitors over a certain amount of time.

### Real-Time Visitor Information

When someone visits your website, information about the visitor will be collected based on the IP address. Each IP address (visitor) is assigned a unique number and is displayed graphically by a rotating ball. Visitors to the website are indicated by the same number until they have been inactive on the website for 60 seconds.

Click on the left frame to expand the visitors information pane.


**Online and History**

For each visitor you can see the referral URL together with the pages visited and host information under the **Online** section. For each active visitor the current page that is visited is displayed. When a visitor has been static on the website for 60 seconds, the visitor is removed from the list of active visitors to the **History** section. The historical data shows when the visitor's most recent activity on the website was concluded. The time stated is taken from the computer's built-in time and date which is displayed in the lower right corner of the screen.

## Accessing Live Monitor on Your Website

When **Live Monitor** is installed on your website, you will find it in the EPiServer CMS top menu next to the **Report Center**. Live Monitor can be set up to use any page on the website as the root. This does not necessarily have to be the site's start page, although this is most common. The configuration of Live Monitor can be customized. Check with your system administrator what applies on your website, and refer to the technical documentation for Live Monitor on world.episerver.com.

## Viewing Highways

It is possible to either view the highways for the entire site, so-called **global highways**, or **to or from** a certain part of the website. Global highways cover all the tracks navigated by visitors over a certain amount of time, and will display the most frequently visited pages on the website. The to/from highways displays from which page a visitor came, and to which page a visitor went.

### Viewing and Hiding Global Highways

Global highways are common navigation tracks that exist for the entire website. They are indicated by an orange arrow with a number representing how many visitors have navigated the site as indicated by the arrow.

- Click **Global** in the lower part of the Live Monitor screen to display global highways.
- Click **Off** in the lower part of the Live Monitor screen to hide global highways.

### How to View Highways to or from a Certain Part of the Website

1. Click the page for which you want to view the highways to or from.
2. Click **From Page** or **To Page**, to display the highways showing from which page most visitors came, or to which page most visitors went.
3. Click **Off** in the lower part of the Live Monitor screen to hide the highways again.

## Viewing Traffic Statistics

The following information is calculated and displayed in the lower right corner of the overview:

- **Hits/hour**. The number of clicks per hour to pages on the website.
- **Clients/hour**. The number of individual visitors per hour to the website.

## Displaying Live Monitor in Full Screen

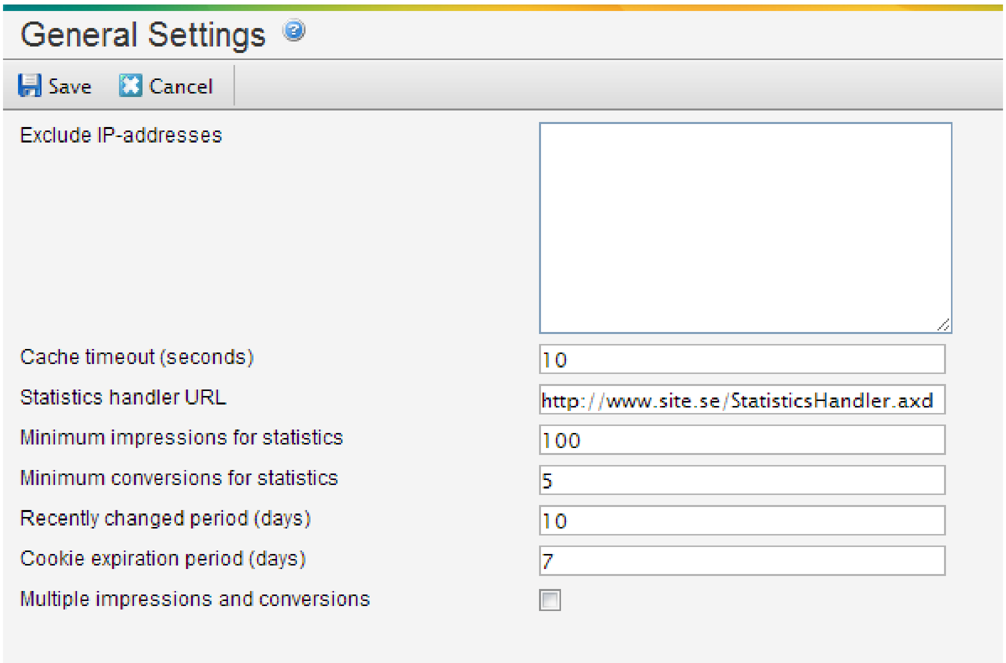
Click the **Full screen** button in the upper right part of the screen to display Live Monitor in full screen mode. Click the **Full screen** button again to exit full screen mode. You can also click **Esc** on your keyboard to exit full screen mode.

# Administering EPiServer CMO

The administration of EPiServer CMO is done by CMO Admin, see *Access Rights* and *Security Settings*.

To access the settings in EPiServer CMO, click **CMO** > **Settings**.

## General Settings

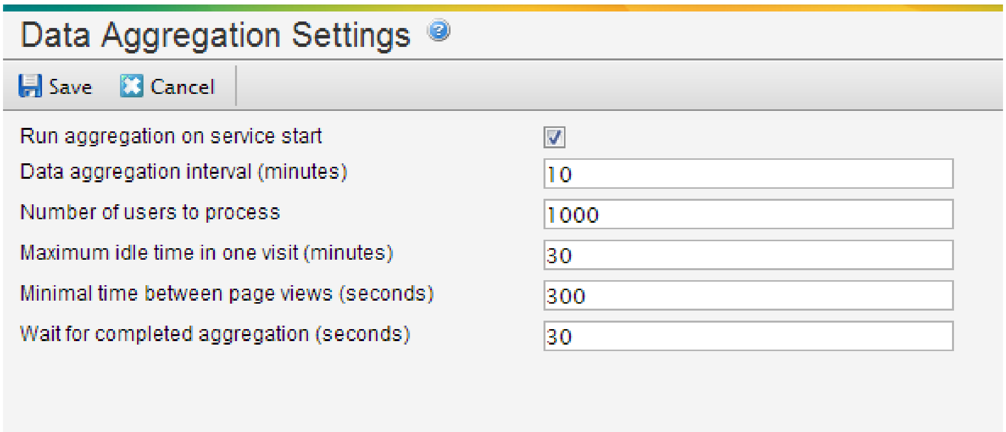



Under **General Settings**, you can define the following settings:

- **Exclude IP addresses**. Type the IP addresses you want to exclude from statistics data collection, for example, all visitors from your own company.
- **Cache timeout (secs)**. Type a time in seconds for how many seconds you want to pass until the cache times out for the CMO data.
- **Statistics handler URL**. Type the URL of the statistics handler, the web address where you collect all your data for aggregation, for example, downloads, clicks, form postings.
- **Minimum impressions for statistics**. Type the minimum number of landing page impressions to start calculating statistics values. Note that if this value is less than 100, the A/B test report will show inaccurate data until the number of impressions reaches 100.
- **Minimum conversions for statistics**. Type the minimum number required between conversions and impressions to calculate statistic values.
- **Recently changed period (days)**. Type the period in days used to display a recently changed list of tests and campaigns.
- **Cookie expiration period (days)**. Type the period in days for the cookie expiration for users not included in an A/B test.
- **Multiple impressions and conversions**. Select whether you want to count the impressions and conversions for a user visiting a campaign page multiple times. Leaving the box cleared will count each visit once.

When you are done, click **Save**.

# Data Aggregation Settings

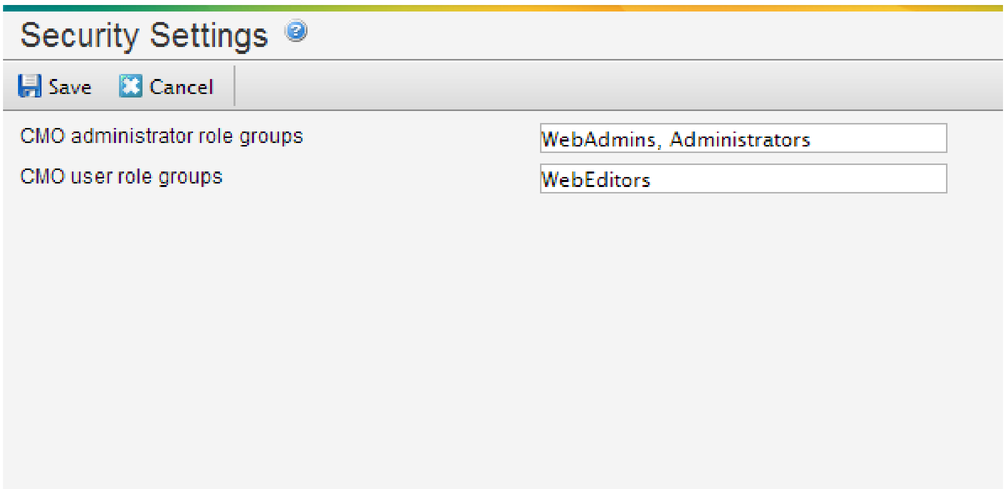



Under **Data Aggregation Settings**, you can define the following settings:

- **Run aggregation on service start**. Select whether you want to run aggregation when the service starts.
- **Data aggregation interval (minutes)**. Type the data aggregation interval in minutes.
- **Number of users to process**. Type the number of users to process simultaneously when the aggregation starts, a value between 1 and 100000. If you change this value to process too many users at the same time, it could slow down the performance of the aggregation so that the database will be out of memory.
- **Maximum idle time in one visit (minutes)**. Type the maximum idle time in minutes for each user visiting a page without doing anything.
- **Minimal time between page views (secs)**. Type the minimum time in seconds between page views to treat as a returning user.
- **Wait for completed aggregation (secs)**. Type the time in seconds to wait until the aggregation is complete when stopping the service.

When you are done, click **Save**.

# Security Settings



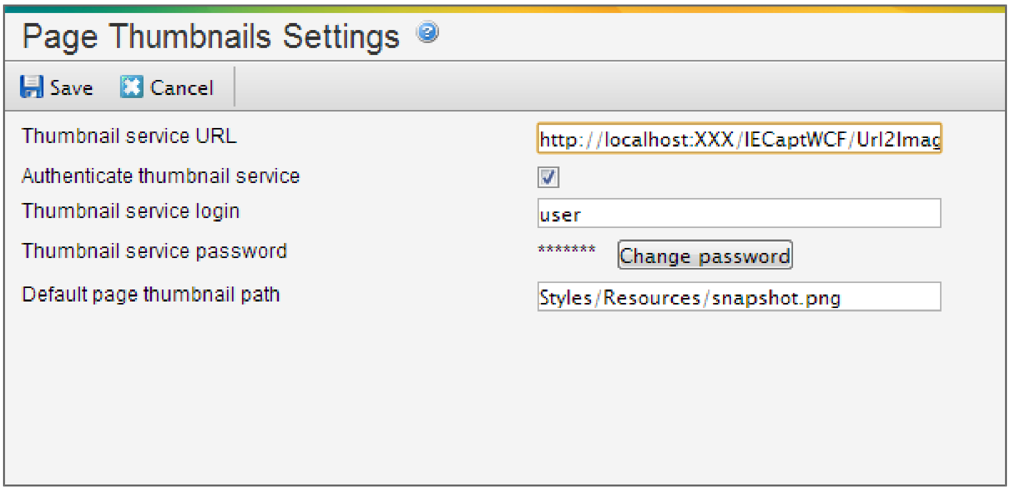

The user roles used in EPiServer CMO are based on the user groups in EPiServer CMS, see *Access Rights*.

Under **Security Settings**, you can define settings for the following roles:

- **CMO administrator role groups**. Type one or several groups used in EPiServer CMS that will have an administrator role in EPiServer CMO, for example, WebAdmins. Use a comma as separator.
- **CMO user role groups**. Type one or several groups used in EPiServer CMS that will have a user role in EPiServer CMO, for example, WebAdmins. Use a comma as separator.

When you are done, click **Save**.

# Page Thumbnails Settings

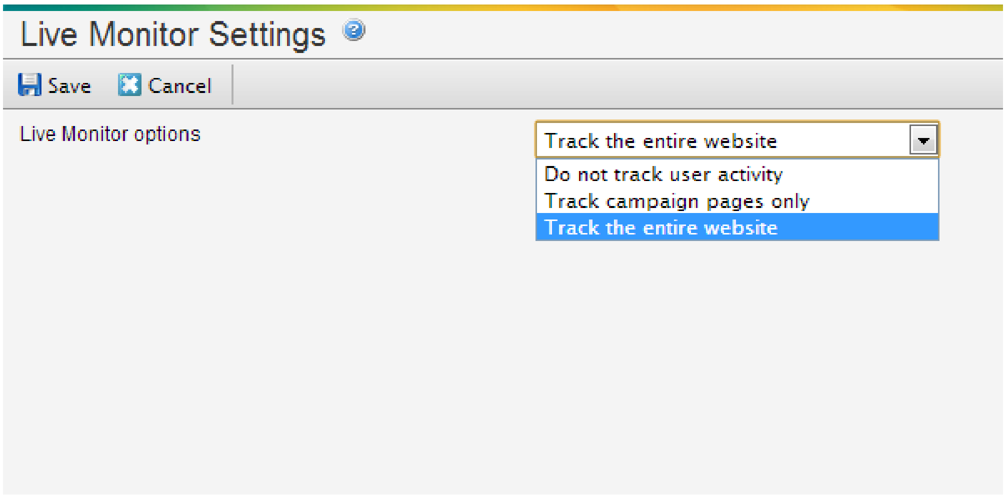



Thumbnails are used to visualize the pages included in campaigns and landing pages in A/B tests. Under **Page Thumbnails Settings**, you can define the following settings:

- **Thumbnail service URL**. Type the URL of the thumbnail service. This will generate the requested page thumbnails.
- **Authenticate thumbnail service**. Select whether you want to authenticate the thumbnail service to the EPiServer CMS website. Note that the credentials are required to build the thumbnails.
- **Thumbnail service login**. Type your user name to log in to EPiServer CMS thumbnail service.
- **Thumbnail service password**. Type your password to log in to EPiServer CMS thumbnail service.
- **Default page thumbnail path**. The default path used in EPiServer CMO for the thumbnail service is a setting defined from the installation. It is possible to install the thumbnail service on a separate server. If you want to use that service instead, change the path from installation by typing the new path.

When you are done, click **Save**.

# Live Monitor Settings



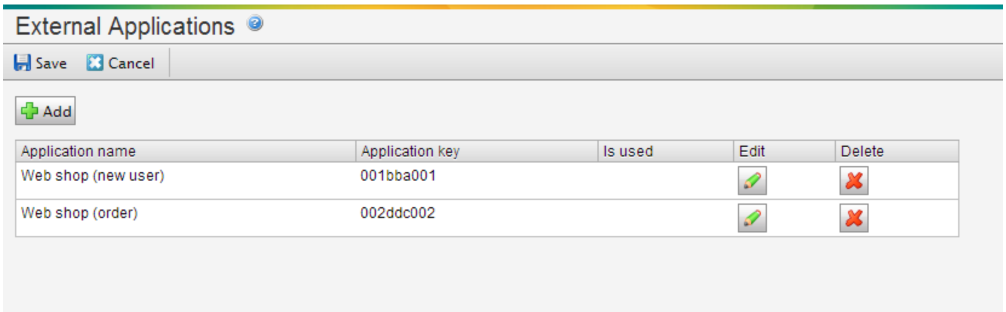

Live Monitor in EPiServer CMO visualizes user activity in real-time on web pages included in a campaign. A JavaScript is injected on the pages you have selected, which will update Live Monitor when a user is viewing a page.

Under **Live Monitor options** you can select one of the following settings:

- **Do not track user activity**. Turns off Live Monitor from tracking user activity on the pages.
- **Track campaign pages only**. Turns on Live Monitor to track user activity only on the campaign pages. Set by default.
- **Track the entire website**. Turns on Live Monitor to track user activity on all pages of the website. Note that this will increase the number of requests to the server.

When you are done, click **Save**.

# External Applications Settings (for Generic KPI)




Under **External Applications Settings** you can set up a list of application keys used as IDs to integrate EPiServer CMO **Generic KPI** settings with external applications or any data source.

To add a new application key, click **Add**. You can do the following settings:

- **Key Name**. Type the name of the application, for example, EPiServer Commerce or Hello World. When adding or changing a campaign, the key name can be selected as a generic KPI in the drop-down list under **Campaign** > **Settings** > **General Campaign KPI**.
- **Key Value**. Type a string value of the application key, which will be used by the external application when sending data. The string can be free text or GUID.

When you are done, click **Save**.

To change a key name in the list, click **Edit**. Save your changes.

To delete an application key from the list, click **Delete**.

See also *About Key Performance Indicators* and *Adding a Campaign*.

# Out-of-the-Box Gadgets

A **gadget** is a small application available from the **Dashboard** in EPiServer OnlineCenter and the Assets Pane and Navigation Pane in EPiServer CMS. A number of gadgets are shipped out-of-the-box with each EPiServer product, see the product-specific user documentation.

You can use some of the gadgets with other devices, such as iPhone and iPad.

You can also develop and customize your own gadgets to suit your needs, see *EPiServer Framework SDK*.

## EPiServer CMO-Specific Gadgets on the Dashboard

EPiServer CMO is shipped with EPiServer CMS standard installation. If you have chosen to install EPiServer CMO, the following EPiServer CMO-specific gadgets are available on the dashboard:

### CMO KPI Summary

The **CMO KPI Summary** gadget shows KPI results from a specific campaign. Some KPIs are general for the entire campaign and the others are based on pages. You can also use this gadget in iPhone or iPad. Set up the gadget as follows:

1. Select the campaign you want to follow.
2. Select **KPI Report Type** from the list and click **OK**. You can select the following reports:
    - Based on the entire campaign with a summary for all KPIs and for a specific KPI.
    - Based on specific pages with a summary of all KPIs and for a specific KPI.

### CMO Live Monitor

The **CMO Live Monitor** gadget shows the navigation patterns for the pages included in your campaign, This gadget does not work for iPhone or iPad. Set up the gadget as follows:

1. Select the campaign you want to follow.
2. In **Live Monitor Control Height**, type the height in pixels and click **OK**.

### CMO A/B Report

The **CMO A/B Report** gadget shows current statistics to estimate the winning page. Set up the gadget as follows:

1. In **Settings**, select the A/B test you want to monitor.
2. In **Compact View**, select if you only want to see the report in graphics only.
3. Click **Finalize** if you want to finalize the test earlier than the end date.

### CMO Campaign Statistics

The **CMO Campaign Statistics** gadget shows current statistics for an ongoing campaign. Set up the gadget as follows:

1. In **Settings**, select the campaign you want to monitor.
2. In **Show Summary**, select if you want to see the general statistics (such as page views, new and returning visitors).
3. In **Show Visits and Page Views**, select if you want to see the statistics as a diagram.
4. In **Show Browser Statistics**, select if you want to see the statistics of which web browsers the visitors use.

5. In **Report Period Scale**, select the time interval to show in the diagram. Note the warning symbol if any time interval is not applicable.