EPiSERVER CMS 6

EPiServer OnlineCenter

User Guide

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EPiSERVER

User Guide for EPiServer OnlineCenter 6.0 Rev A

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What is EPiServer OnlineCenter?

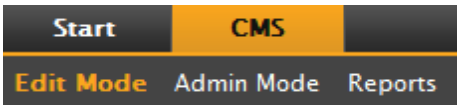
EPiServer OnlineCenter is the main entrance to EPiServer CMS and related modules. OnlineCenter provides an overview of your website with easy access to all integrated modules. These are available from the top menu of OnlineCenter. Furthermore, OnlineCenter can be customized to your needs and you can add your own "gadget" to the dashboard for quick access. Gadgets can be used to monitor activities on the site, for instance you can display recently changed pages or registrations to a form. With OnlineCenter you will always be on top of what is happening on the website!

The two main elements of OnlineCenter is:

- The **global navigation** on top, for quick access to integrated modules on the website.
- The **site dashboard** for aggregation and display of important website information. The site dashboard is personalized and will appear differently to different users, depending on their choices of content.

Global Navigation

The top menu of the EPiServer OnlineCenter holds the global navigation. Here you will find all the different modules integrated with your website, for instance EPiServer Community or third party products that have been integrated with EPiServer CMS in your solution. Depending on the module you select, the sub menu on the second row will look different, containing the views and functions of the specific module. For instance, in the case of EPiServer CMS you will get direct access to the Edit and Admin mode when you click on "CMS".



Site Dashboard

The site dashboard aggregates and displays important site information. The dashboard is also a plug-in area where you can add customized gadgets for presenting high-level information or provide quick access to common tasks or frequently used features. It can be for instance recently changed pages, tasks, notes or other activities on the site.

The dashboard is made up of tabs, gadgets and zones:

- With **tabs**, different view can be created for instance for sales, marketing or web masters.
- The **zones** control the layout of the dashboard so that you can organize the information as desired. Zones will divide the layout of the dashboard tabs into one, two or three columns, depending on your choice. There is always at least one tab available, and the first default tab has two columns.
- Using **gadgets** you create your own display objects such as a listing of recently changed pages, a news list or quick links.

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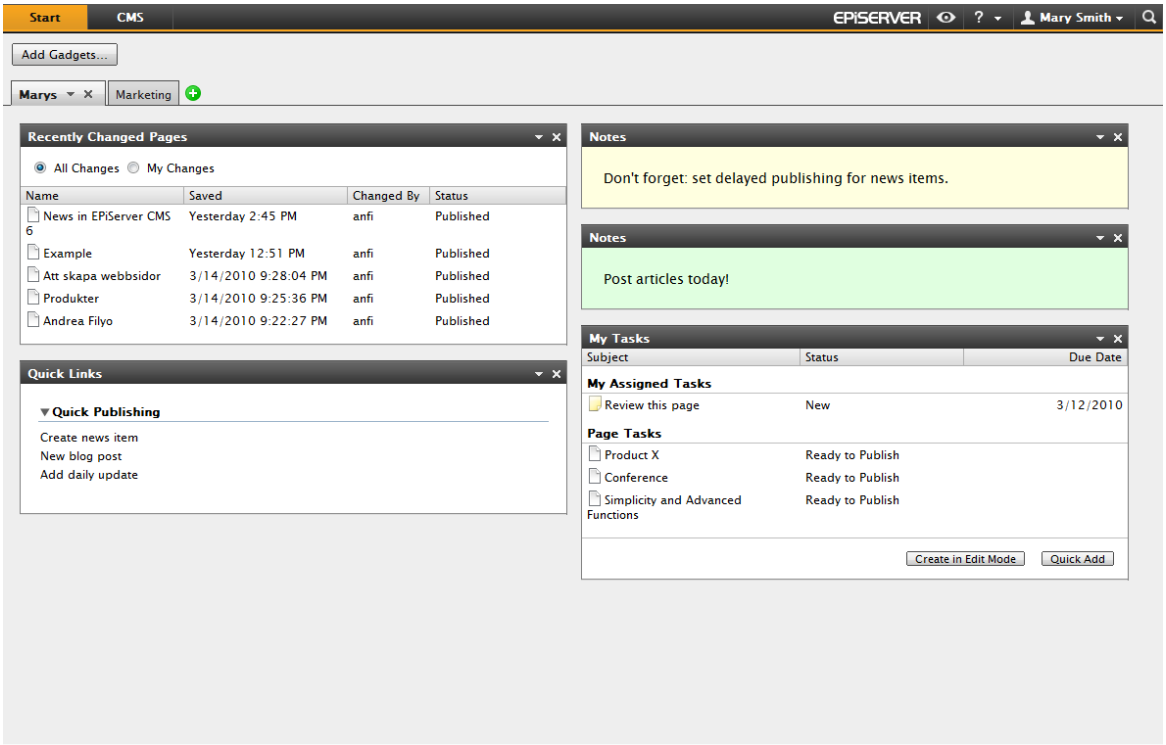
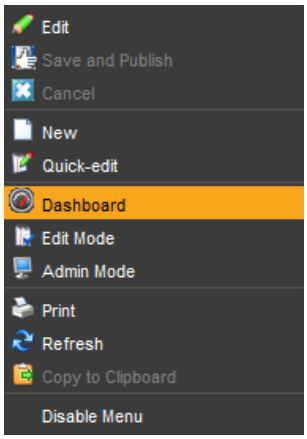


Accessing the OnlineCenter Dashboard

When logging in to the website, the OnlineCenter dashboard can be accessed by selecting the **Dashboard** option in the right-click menu of a page in View mode.



You can also access OnlineCenter from the EPiServer CMS Edit mode by selecting the **Start** tab in the global navigation.

EPiServer OnlineCenter Menu

The OnlineCenter menu in the upper right part of the screen holds the following options:

- Clicking on the **EPiServer** logo will take you to www.episerver.com.
- Clicking on the "eye" symbol will take you to the View mode of the website.
- Clicking the "?" symbol opens a drop-down list where you can access the online help for modules in your installation.
- Selecting the **Administrator** option will provide access to your settings for the various modules in your installation, including components and Microsoft add-ins for EPiServer CMS. From here you can also **log out** from OnlineCenter.
- The OnlineCenter search function is available to the right in the OnlineCenter menu.

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Search in EPiServer Products

EPiServer OnlineCenter has a sophisticated search function which allows you to search through content in all of the integrated modules of your website. The **Search** button is located in the upper right corner of the OnlineCenter.

Not only is it possible to search for pages with a certain name, you can also search for pages that contain a certain text string. This means that if you can't remember what the page is called or its ID number but remember the first lines of the text, then the page can easily be retrieved. You can also search in files on the website.

When selecting a link in the search hit list, information about the page will be displayed, helping in identifying the correct item. Clicking on a link will take you to the item, for instance an EPiServer CMS page.

Search options can be configured in the EPiServer CMS administration mode.

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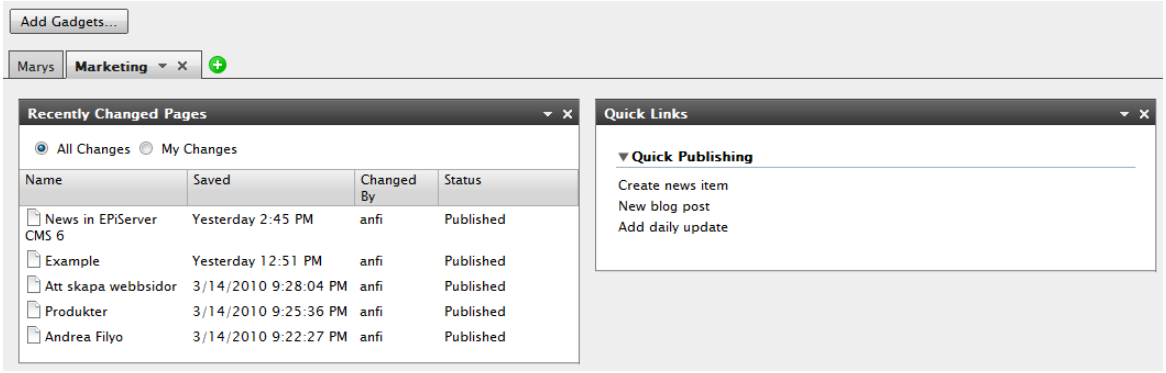
Working with EPiServer OnlineCenter

EPiServer OnlineCenter is the main entrance to your website, and provides access to EPiServer CMS and integrated modules and systems. Apart from using OnlineCenter to monitor your website, working with OnlineCenter includes the following tasks:

- Creating **tabs** - adding, editing and deleting tabs.
- Creating **gadgets** - adding, editing and deleting gadgets.
- **Organizing the dashboard** - putting the objects where you want them, in columns and under tabs.

Tabs

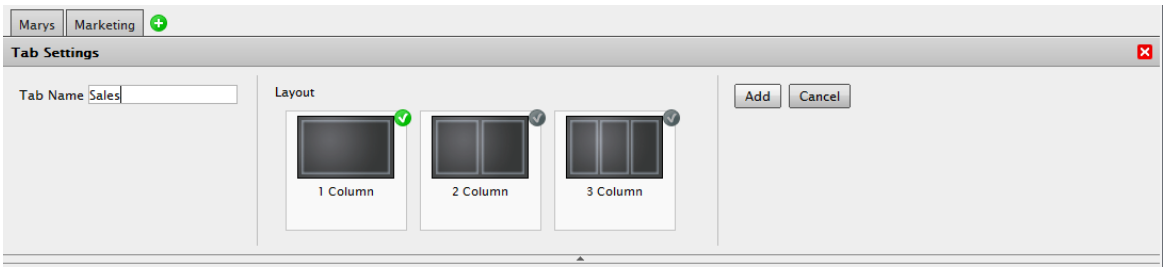
Tabs are used for organizing the OnlineCenter information. You can create your own tabs, and add gadgets of your choice. You can for instance have one tab for the marketing team, and one for product editors, with specific gadgets available for each of these groups. You can customize the layout of each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



Creating Tabs

You can add new tabs to organize the OnlineCenter overview:

1. Click the green +symbol in the tab section of the dashboard.
2. Enter a name for the tab in the **Tab Name** field.
3. In the **Layout** field, define how many columns the tab information area will have by clicking one of the available options.
4. Select **Add** to save the tab. The new tab will be displayed with an empty information zone where you can add gadgets of your choice.



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

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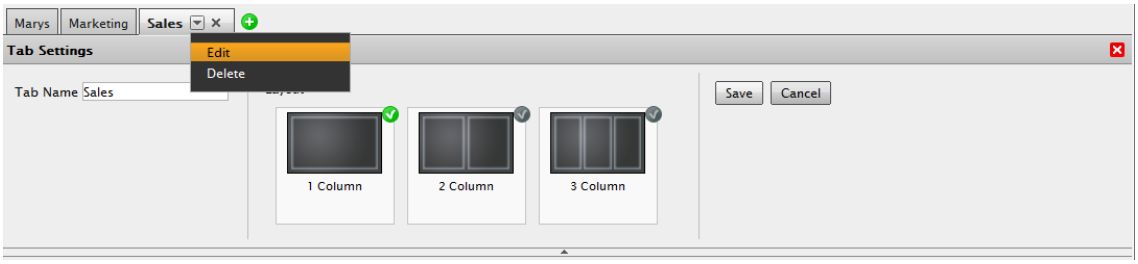
Editing Tabs

You can edit a tab to change the layout or the available gadgets.

1. Select **Edit** in the drop-down list for the tab you want to edit.
2. You can change the name for the tab in the **Tab Name** field.
3. You can change the layout for the tab in the **Layout** field. Existing gadgets will be moved to available columns in the new layout.
4. Select **Save** to save your changes.

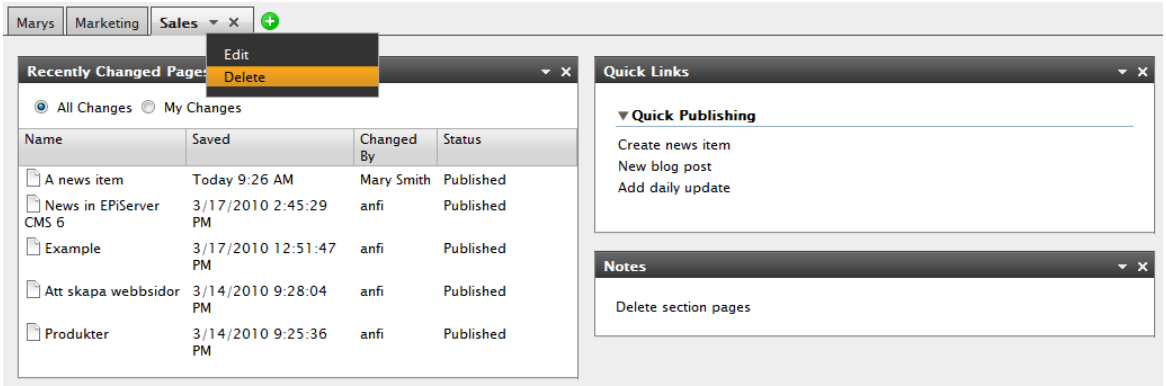


You can close the edit tab panel by clicking the panel bottom list, or clicking the top rigth **Collapse panel** button. Note that your changes will not be saved unless you click **Save**.

Deleting Tabs

You can remove a tab from the OnlineCenter dasboard.

1. Select **Delete** in the drop-down list for the tab you want to delete. You can also delete a tab by clicking the **X** symbol next to it.
2. If you selected **Delete**, confirmation message will be displayed. Select **OK** to confirm the deletion.



3. The deletion can be undone by clicking the **Undo** link in the confirmation message displayed at the top. The tab will then be restored with all its gadgets.

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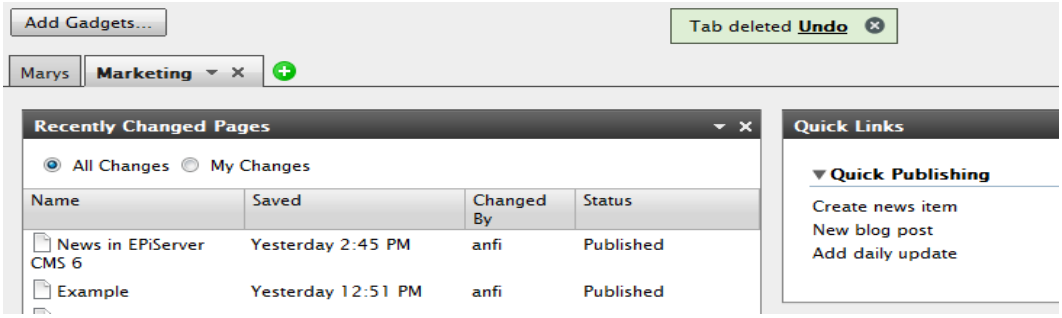
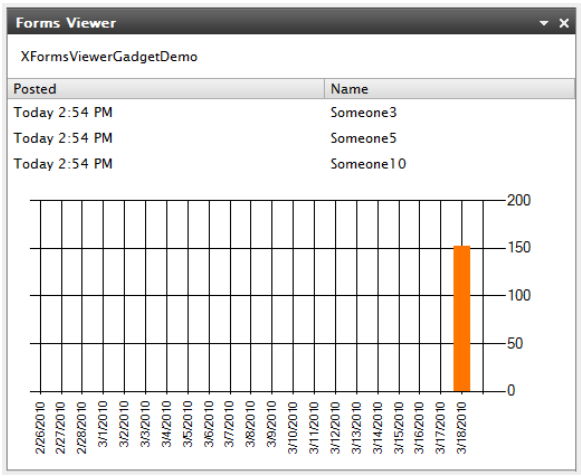


There must always be at least one tab available in the OnlineCenter, which means that the last remaining tab cannot be deleted.

Gadgets

A gadget is a small application which can be displayed on the OnlineCenter dashboard for quick access. OnlineCenter comes with a number of predefined gadgets. You can also develop and customize your own gadgets to suit your needs and the tasks you are working with. Find out more about development of gadgets in the technical documentation for OnlineCenter and EPiServer CMS on world.episerver.com. Each gadget has a drop-down menu in the upper right corner. What you see in the menu depends on the functionality available for the gadget, but you will most often find at least the **Edit** and **Delete** options here.



Adding Gadgets

1. Select **Add Gadgets...** at the top of the OnlineCenter.
2. Select the type of gadget you want to add by clicking on it. The gadgets you see in the list may vary between different websites depending on which gadgets have been implemented.
3. The gadget will be added to the OnlineCenter dashboard, where you can continue working with it.
4. Close the gadget panel by clicking the **Add Gadgets...** button again, or by clicking the bottom frame of the panel.

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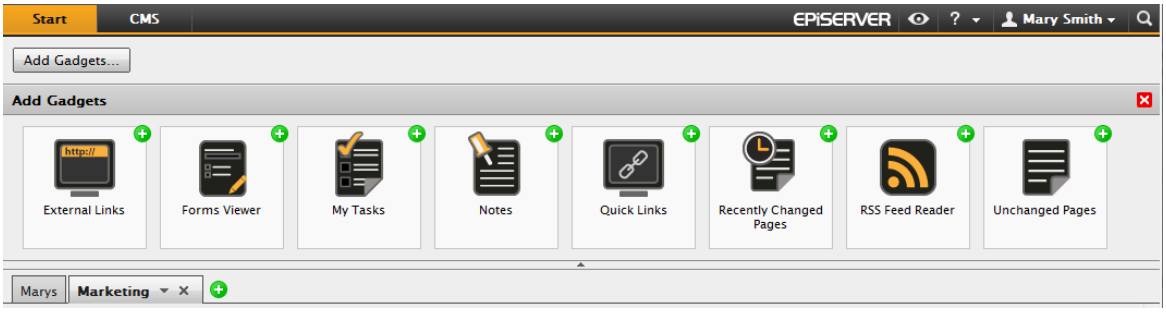
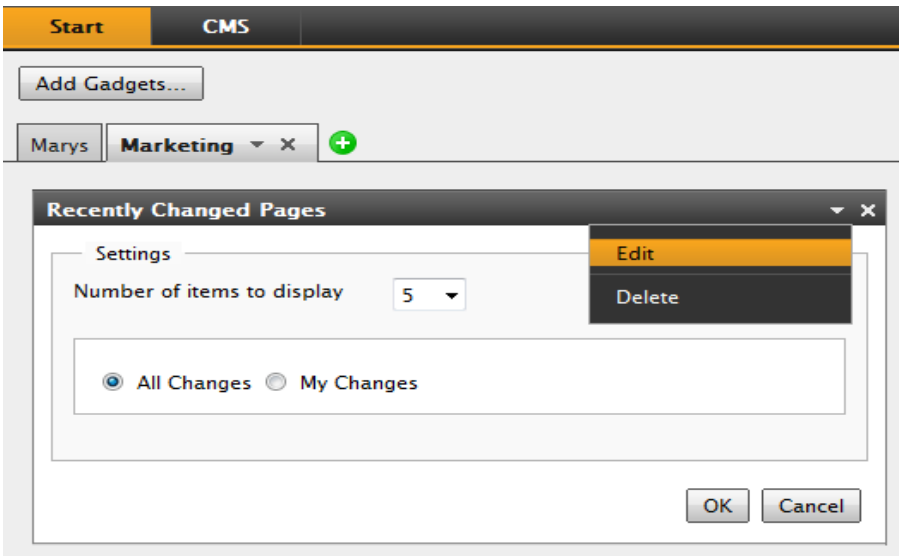


Editing Gadgets

1. To edit a gadget, select the **Edit** option in the gadget menu in the upper right corner of the gadget. Depending what type of gadget it is, editing may also be done in other ways. In this example, we are editing the **Recently Changed Pages** gadget.
2. Change the various options for gadget. In the case of the **Recently Changed Pages** gadget, you can change the number of items displayed in the regular and maximized view.
3. Select **OK** to save your changes.



Moving Gadgets

You can organize the dashboard by moving gadgets around and placing them according to your preference. The dashboard is organized into columns, and gadgets can be moved up and down in a column, and between columns.

To move a gadget, click on the gadget title bar to select it, hold down the left mouse button and drag and drop the gadget into the desired place. You can also use the keyboard to move a gadget. Select the gadget by clicking the gadget title bar, then use CTRL + Arrow keys to move the gadget.

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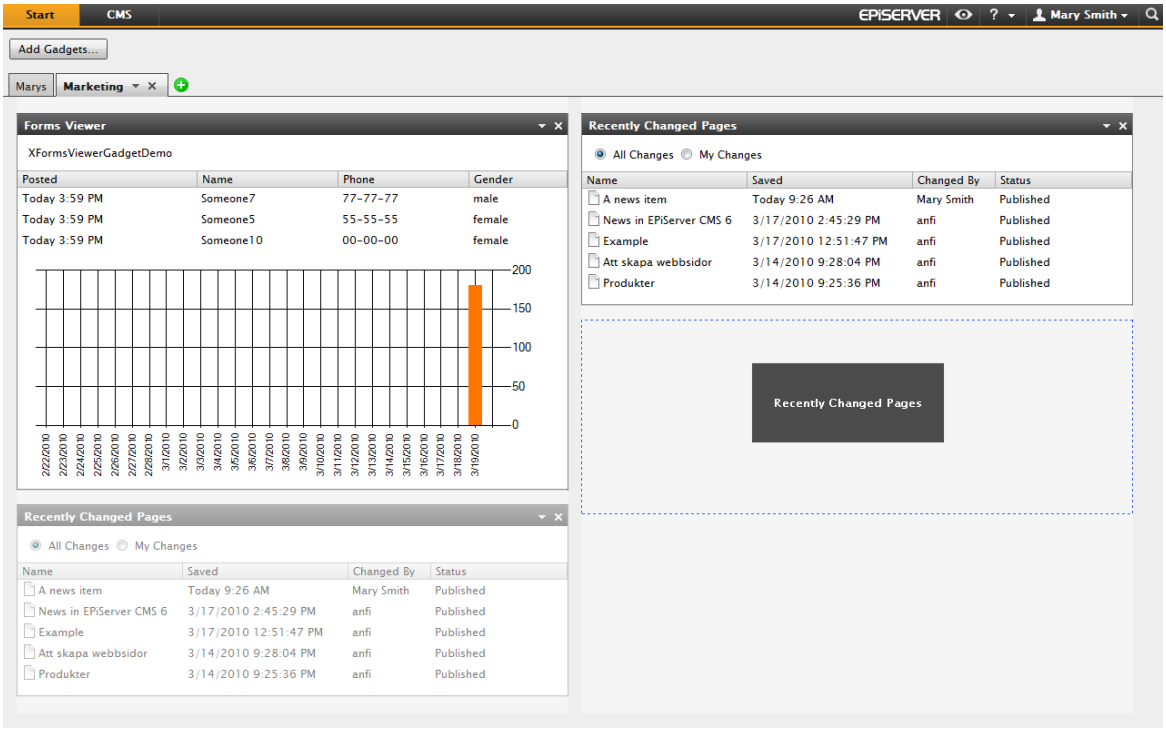
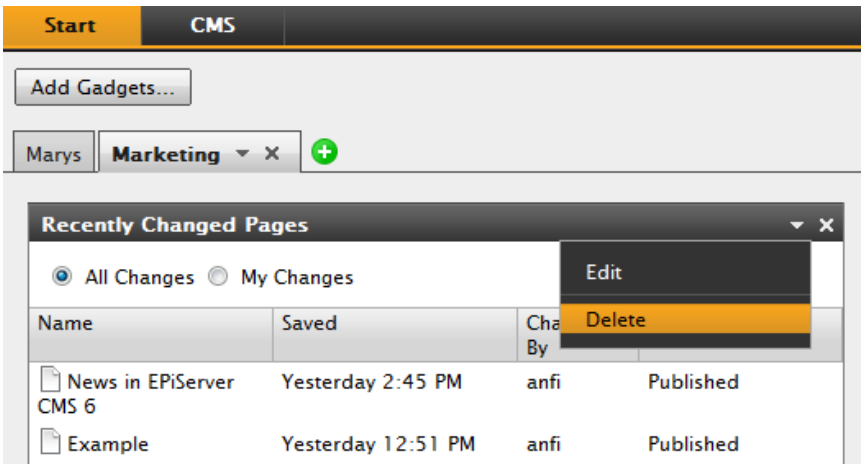


Deleting Gadgets

1. To delete a gadget, select the **Delete**option in the gadget menu in the upper right corner of the gadget, or select the **Delete** symbol in the upper right corner of the gadget.
2. The gadget will be deleted from the dashboard. To restore the gadget again, click the **Undo** link in the confirmation message displayed at the top of the dashboard.



Predefined Gadgets

EPiServer OnlineCenter comes with the following example gadgets:

- **Forms Viewer** - for monitoring of activities in a form, for instance a web poll or a registration form.
- **My Tasks** - for managing of tasks to be distributed to others, can be related to EPiServer CMS pages.
- **Unchanged Pages** - displays pages that have not been changed for a defined time period.
- **Recently Changed Pages** - listing of changed pages, all pages or pages created by you.
- **Quick Links** - for creating easily accessible links on the dashboard.

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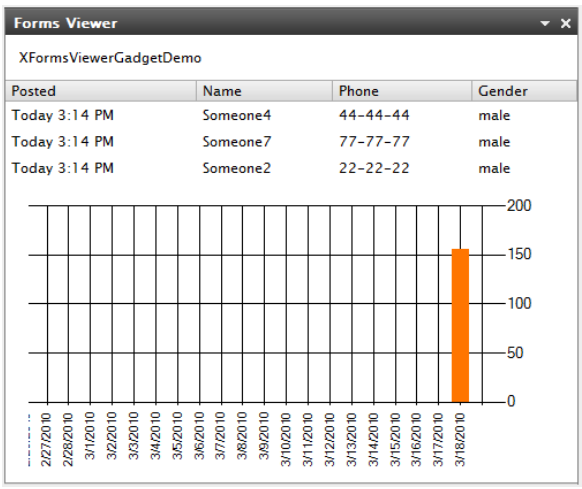
- **External Links** - provides an overview of the external links of the website.
- **Notes** - for adding of "post it" notes on the dashboard.

These gadgets are included in a standard installation as examples of the use of gadgets in OnlineCenter.

Forms Viewer Gadget

The **Forms Viewer** gadget provides a possibility to monitor the activity for a specific web form, for instance a poll, a registration or contact form. This is intended not only for editors, but anyone who has an interest in the activities of your website, for instance a marketing or business area manager. The **Form Viewer** will display a selected number of the latest activities for instance the latest votes or registrations to a form. The result of the **Forms Viewer** gadget can also be displayed graphically, providing a quick and easily interpreted overview of the form activities.



Configuring Forms Viewer

Do the following to add a form and configure the settings for the**Forms Viewer** gadget:

1. Click **Edit** in the drop-down list in the top right corner of the gadget.
2. Select **Demo mode** to view the form in graphical demo mode. Note that you will need to prepare a demo view file of the form. This will then appear in the **Select Form** drop-down list. In a standard installation you will find an example form viewer, the "XFormsViewerGadgetDemo".
3. Select a form in the **Select form** drop-down list. Depending on the form you select, you will get different options of fields to include in the viewer. In this example, a contact form with a name, e-mail and a message, has been selected.
4. In the **Display item post date**, you can choose to display the date of the form posting.
5. Select the number of form post to display in the **Number of items to display** field.
6. Select **Display chart** to display a chart for the form.
7. Select the periodicity for the chart in the **Chart periodicity** drop-down list.
8. Select the frequency for information update in the **Automatically update** drop-down list. This setting determines how often the information in the forms viewer will be updated.
9. Select **OK** to save the settings.

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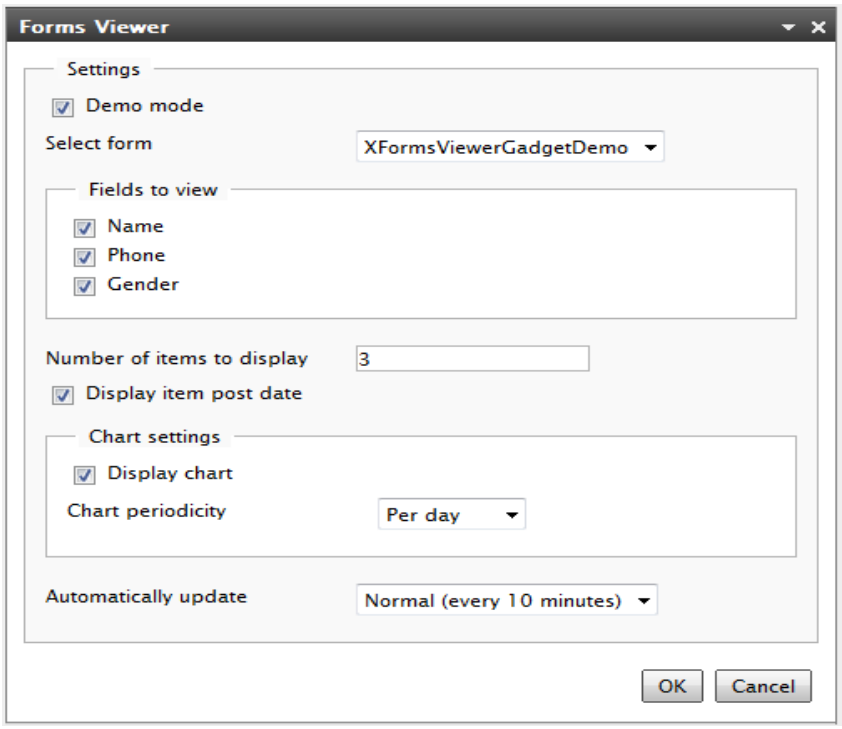
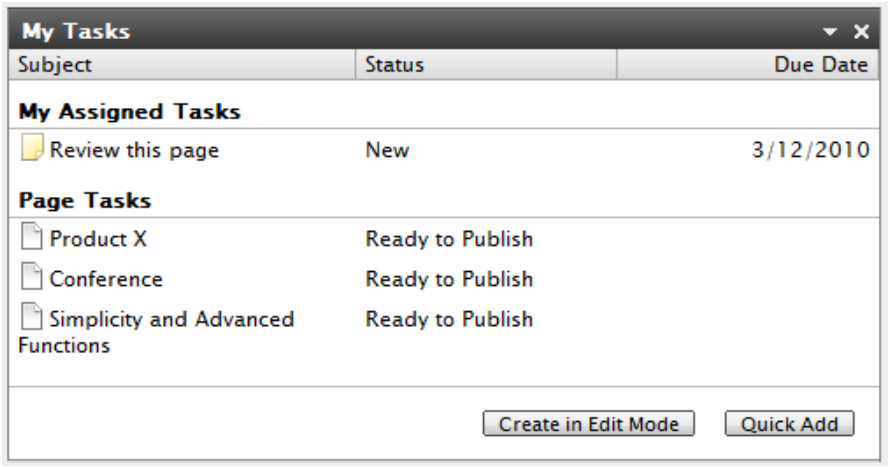


My Tasks Gadget

With the **My Tasks** gadget you will have quick access to EPiServer CMS tasks. You can view their status and create new ones. Tasks can be created and distributed directly from the OnlineCenter dashboard, or from the EPiServer CMS Edit mode. When tasks are created and saved in EPiServer CMS, they will be displayed in the **My Tasks** gadget on the dashboard. Selecting a task link in the **My Tasks** gadget will take you to the EPiServer CMS Edit mode.



Creating Tasks from the Dashboard

1. Select **Quick Add** to create a task directly from the dashboard.
2. Enter the subject name in the **Subject** field.
3. Select a due date in the **Due Date** field, click in the field to enter the date.
4. Enter a description of the task in the **Description** field.
5. Assign the task to a group or an individual in the **Assign To** drop-down list.

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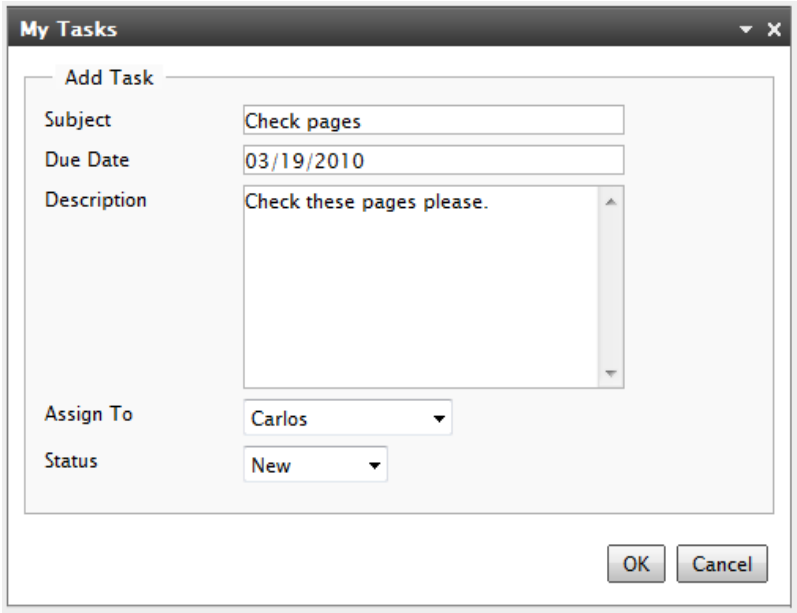
6. Set a status for the task in the **Status** field. This is also where you update the status of a task created from the dashboard.
7. Click **OK** to save the task.



Creating Tasks from the EPiServer CMS Edit Mode

Select **Create in Edit Mode** in the **My Tasks** gadget to create a task inside EPiServer CMS. This will take you to the EPiServer CMS Edit mode with the **Action Window** open to the right, in order for you to select a page and create a task. Enter the tasks details and click **Save**.

The task will be added to the **My Tasks** gadget in the OnlineCenter dashboard. Clicking on a task link from the dashboard will take you to the EPiServer CMS Edit mode.

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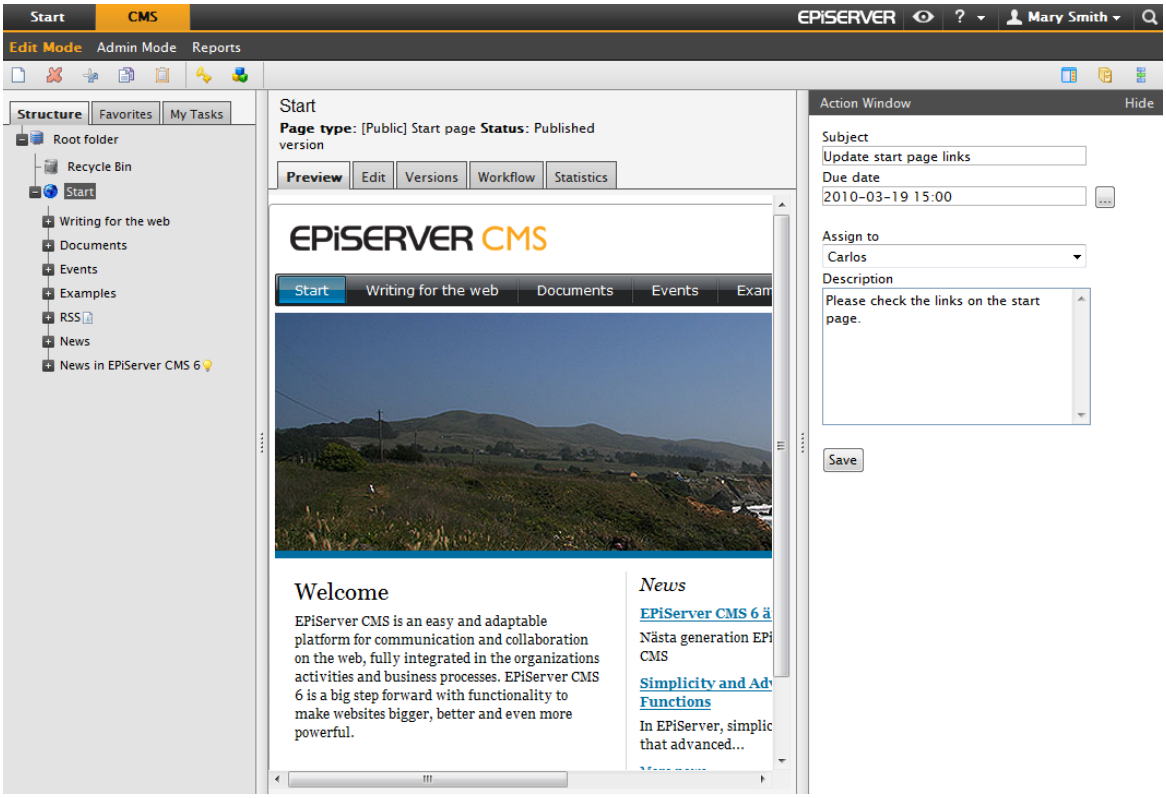
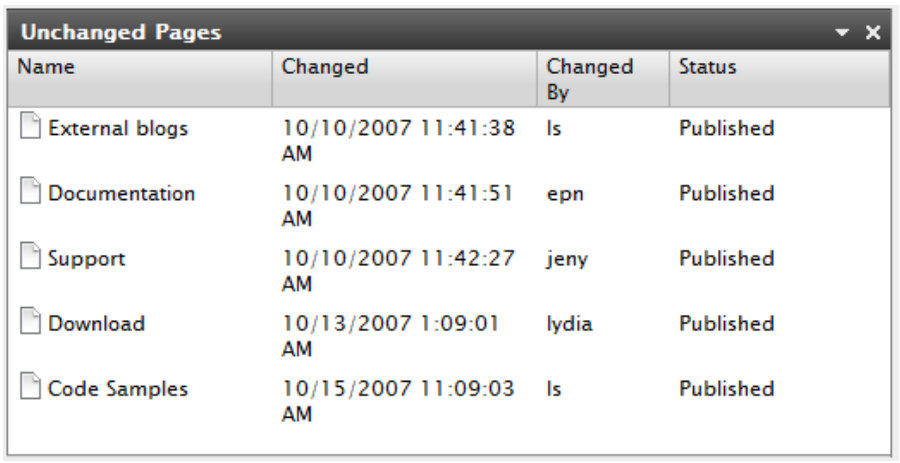


Unchanged Pages Gadget

The **Unchanged Pages** gadget provides an overview of pages that have remained unchanged for a certain time period. This gives you an opportunity to follow up on pages that might need to be reviewed. The pages are listed with name, the date when the page was last updated and by whom, and the page status.



Configuring Unchanged Pages

When you set up the **Unchanged Pages** gadget you can choose the number of items to display in the list. You can also set the desired time period in months for unchanged pages to be displayed in the list. Check **Sort descending** to sort the pages in the list.

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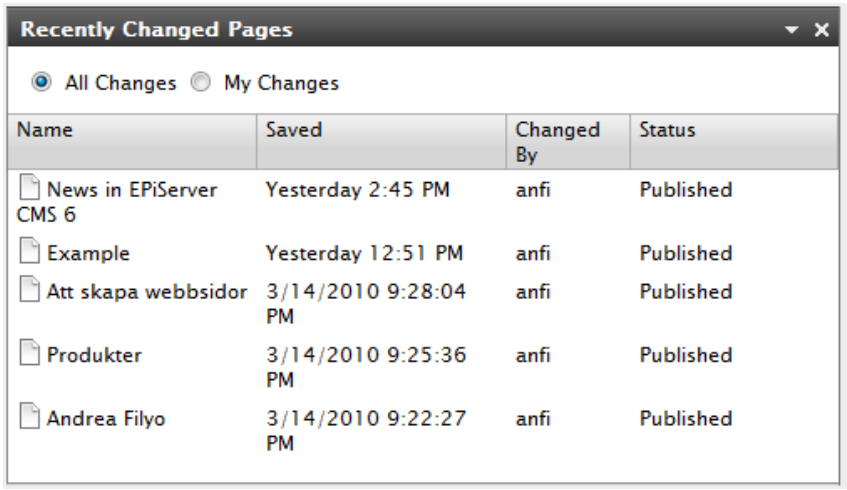
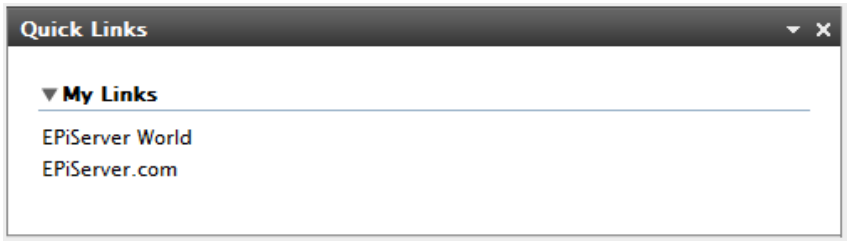
Recently Changed Pages Gadget

The **Recently Changed Pages** gadget provides an overview of recently changed pages on the website. You can chose to view either all changes or your own changes only. The list of changed pages will be displayed showing page name, modification date, the user who has done the change and the status for the page.



Quick Links Gadget

The **Quick Links** gadget provides quick access to important links. You can add links of your choice to the **Quick Links** gadget, to be displayed on the dashboard.



Adding Quick Links

To add links in a newly created **Quick Links** gadget, click **Manage Links**. You can add a new link to an existing **Quick Links** gadget by opening the gadget for editing and clicking the **Add Link** button. Enter a display title in the **Title** field, and a URL for the link in the **URL** field.

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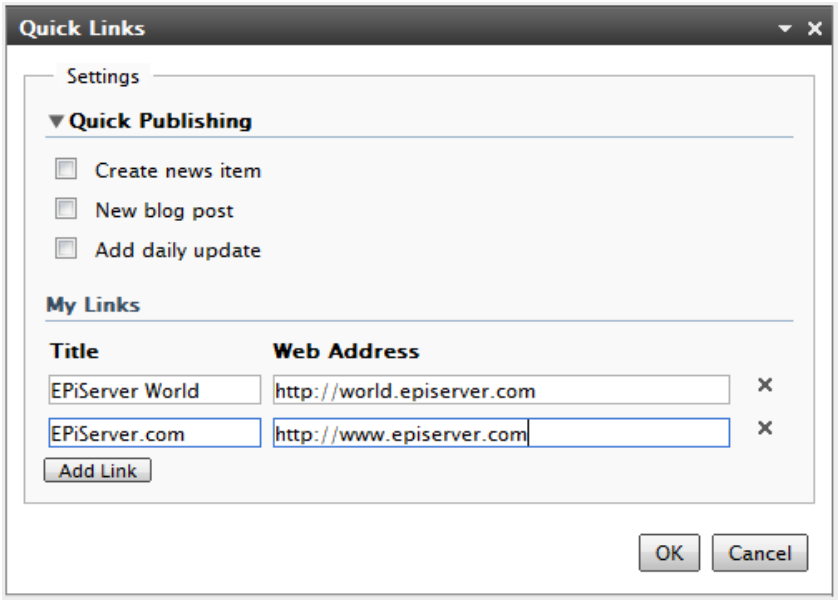
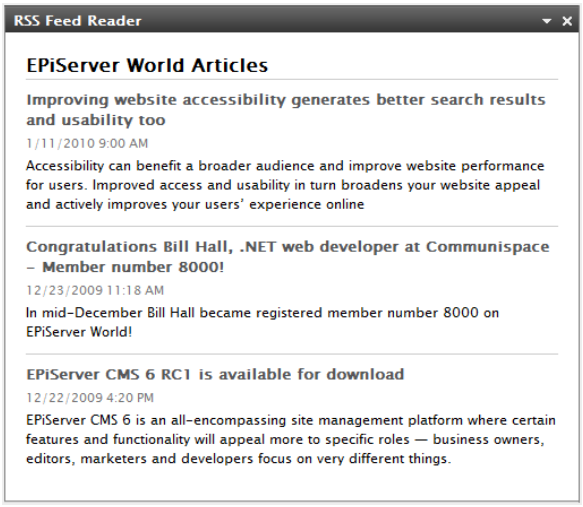


RSS Feed Reader Gadget

The **RSS Feed Reader** gadget is a simple example of how you can use gadgets to display RSS feeds on the dashboard. The gadget shows the latest feeds from an RSS source of your choice. You can define the number of feeds to be displayed in the gadget.



Configure the RSS Feed Reader Gadget

When you set up the **RSS Feed Reader** gadget you enter the URL for the RSS feed of your choice. Define the number of feed items to be displayed and enter a title for the RSS feed. Click **Fetch title from the feed** to use the default title from the source. Click **OK** to save the RSS Feed Reader gadget. You can create multiple RSS Feed Reader gadgets if you wish.

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External Links Gadget

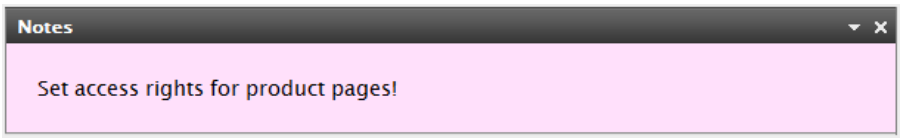
With the **External Links** gadget you can get an overview of the external links of your website. This is useful if you want to find out to which external websites you are referring to from your own site.

Adding External Links

When adding external links, you can select the number of items to display in the list. The list will display the number of links for each web address. You can also choose to see a more detailed item list by selecting **Show details**. This option will display the full URL for each link.

Notes Gadget

The **Notes** gadget lets you create "post it notes" with important information to be placed on the dashboard. When you have inserted the **Notes** gadget on the dashboard, you can enter the text directly in the notes area. You can also customize the appearance of the **Notes** gadget.



Customizing the Notes Gadget

You have the following customizing possibilities for the **Notes** gadget:

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- Change the text size by selecting a size in the **Text Size** field.
- Select a background color in the **Background Color** field.

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Quick Publishing

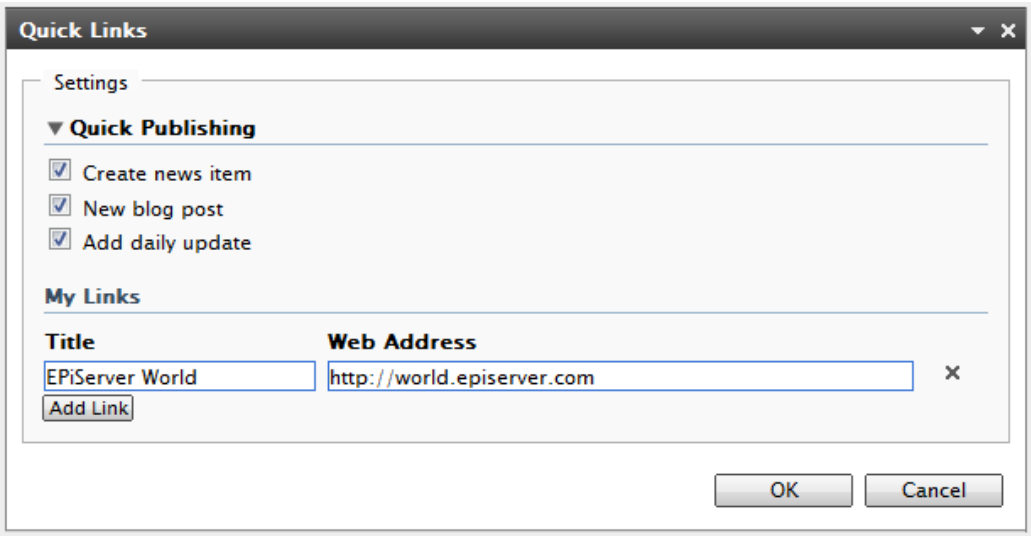
Many EPiServer CMS websites contain hundreds of pages, often making it daunting for infrequent users to create pages based on the right page type in the correct place in the tree structure. **Quick publishing** makes it easier for EPiServer CMS users to create recurring items such as news and blog entries. Configurable settings ensure that the pages are saved in the correct place and that, for example, images receive an alternative text.

Quick publishing is especially useful for users that do not frequently work with EPiServer CMS, but still need to be able to publish information now and then. Quick publishing is easy to develop for a website. Further information about how this is done can be found in the technical documentation for EPiServer CMS.

In a standard installation of EPiServer CMS you will find the following predefined examples of quick publishing:

- Create news item
- New blog post
- Add daily update

These predefined settings are available in **OnlineCenter** when you create a **Quick Links** gadget, but you need to configure your website to display them. Please refer to the technical documentation for EPiServer CMS to find out more about this configuration.



Depending on what has been implemented on your website you might also have other settings available.

Create News Items

Create news item guides the user in the creation of a news item. The news item will automatically be created in the right place in the page tree structure, based on the correct page type.

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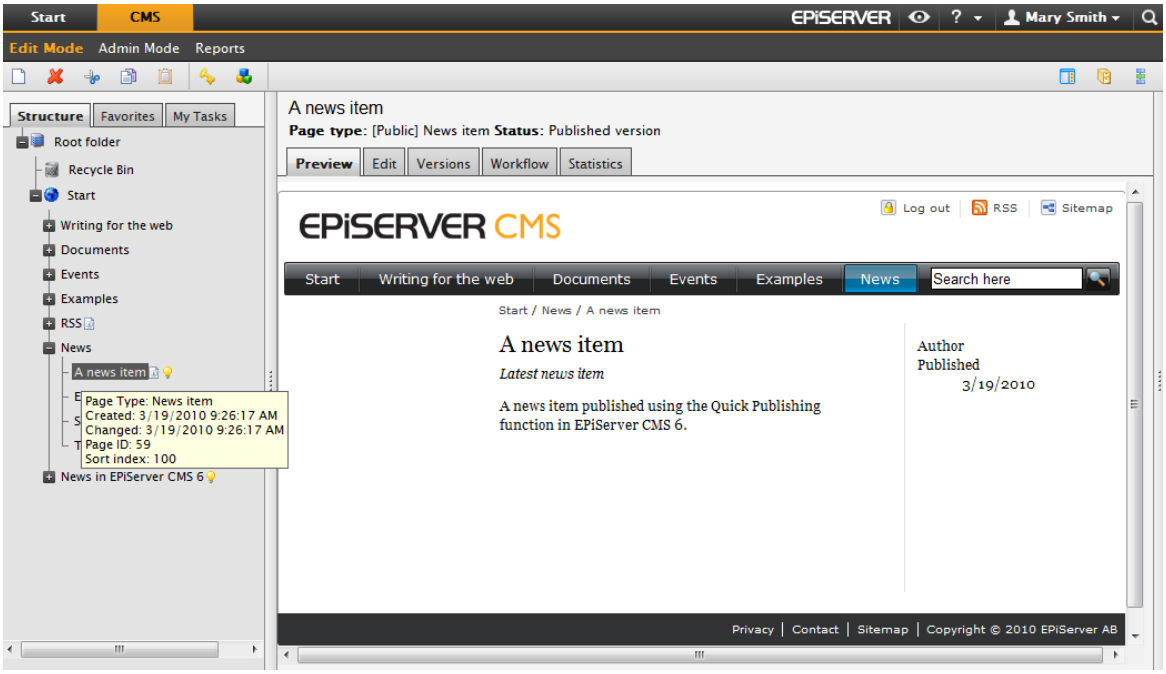
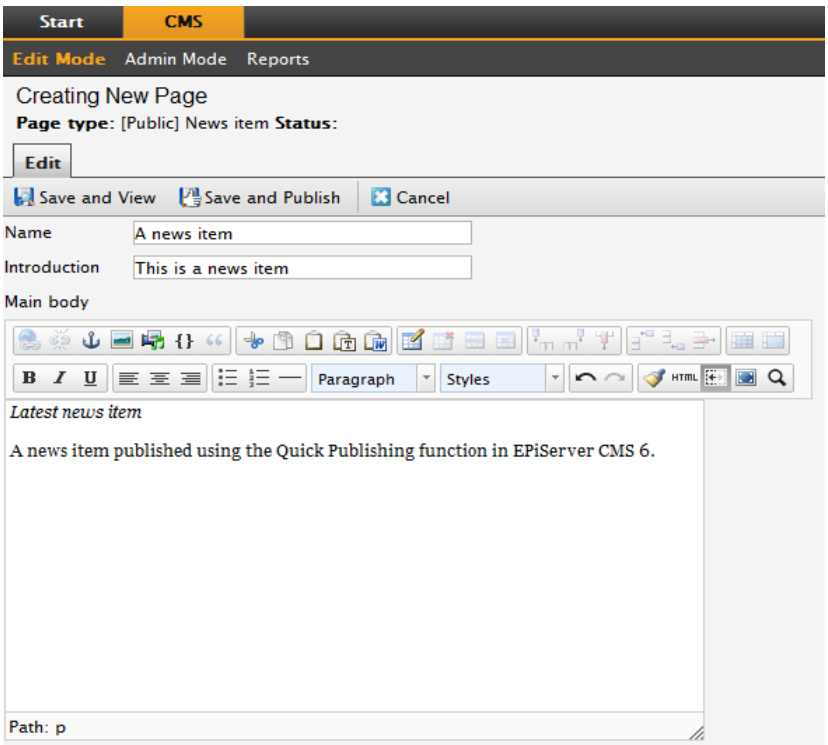


Create a news item with **Create news item**:

1. Select **Create news item** under the **Quick Links** gadget on the dashboard.
2. Create your news item, provide a name for the news item in the **Name** field, and introduction in the **Introduction** field, and content in the **Main body** field.
3. Select **Save and Publish** to publish the news item. By selecting **Save and View**, you also have the possibility to save and view the news item, before publishing it.



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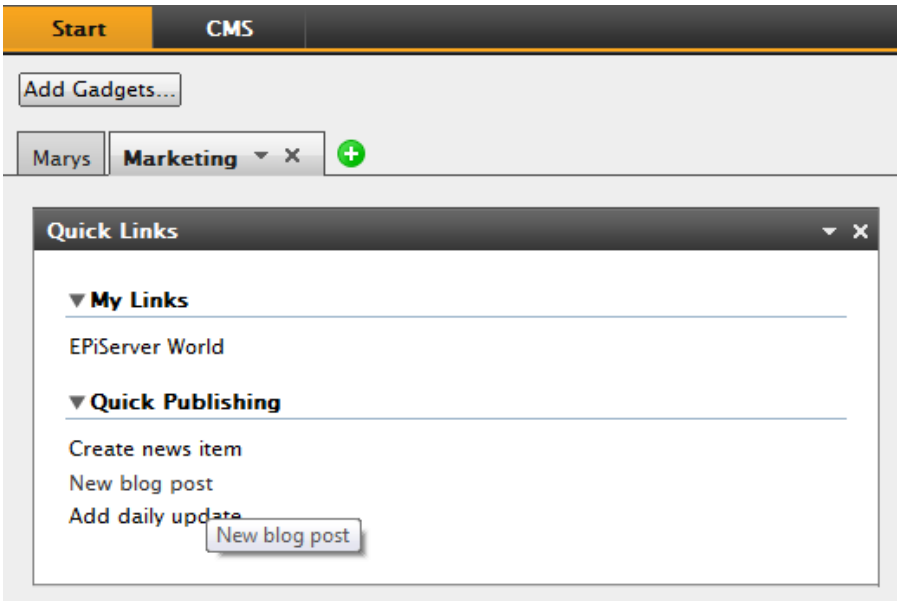
New Blog Post

New blog post guides the user in the creation of a blog post. The blog post item will automatically be created in the right place in the page tree structure, based on the correct page type.



Do the following to create a **New blog post**:

1. Select **New blog post** under the **Quick Links** gadget on the dashboard.
2. Create your blog post, provide a name for the post in the **Name** field, and enter content in the **Main body** field.
3. Select **Save and Publish** to publish the blog post. By selecting **Save and View**, you also have the possibility to save and view the blog post, before publishing it.

Add Daily Update

Add daily update guides the user in the creation of a daily update. The daily update item will automatically be created in the right place in the page tree structure, based on the correct page type.

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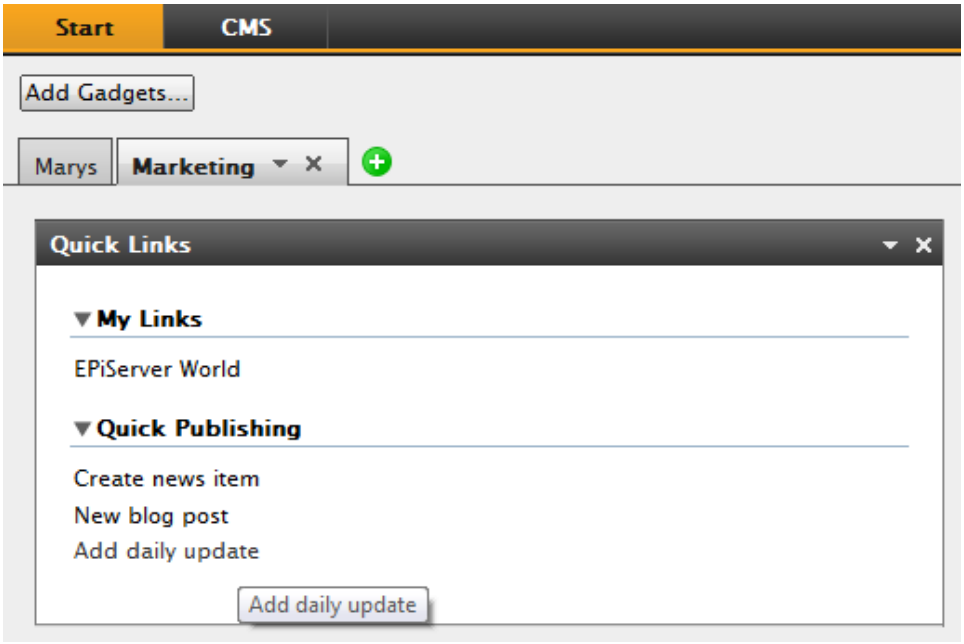

Do the following to create a news item with **Add daily update**:

1. Select **Add daily update** under the **Quick Links** gadget on the dashboard.
2. Create the daily update item, provide a name for the item in the **Name** field, and enter content in the **Main body** field.
3. Select **Save and Publish** to publish the blog post. By selecting **Save and View**, you also have the possibility to save and view the blog post, before publishing it.

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