

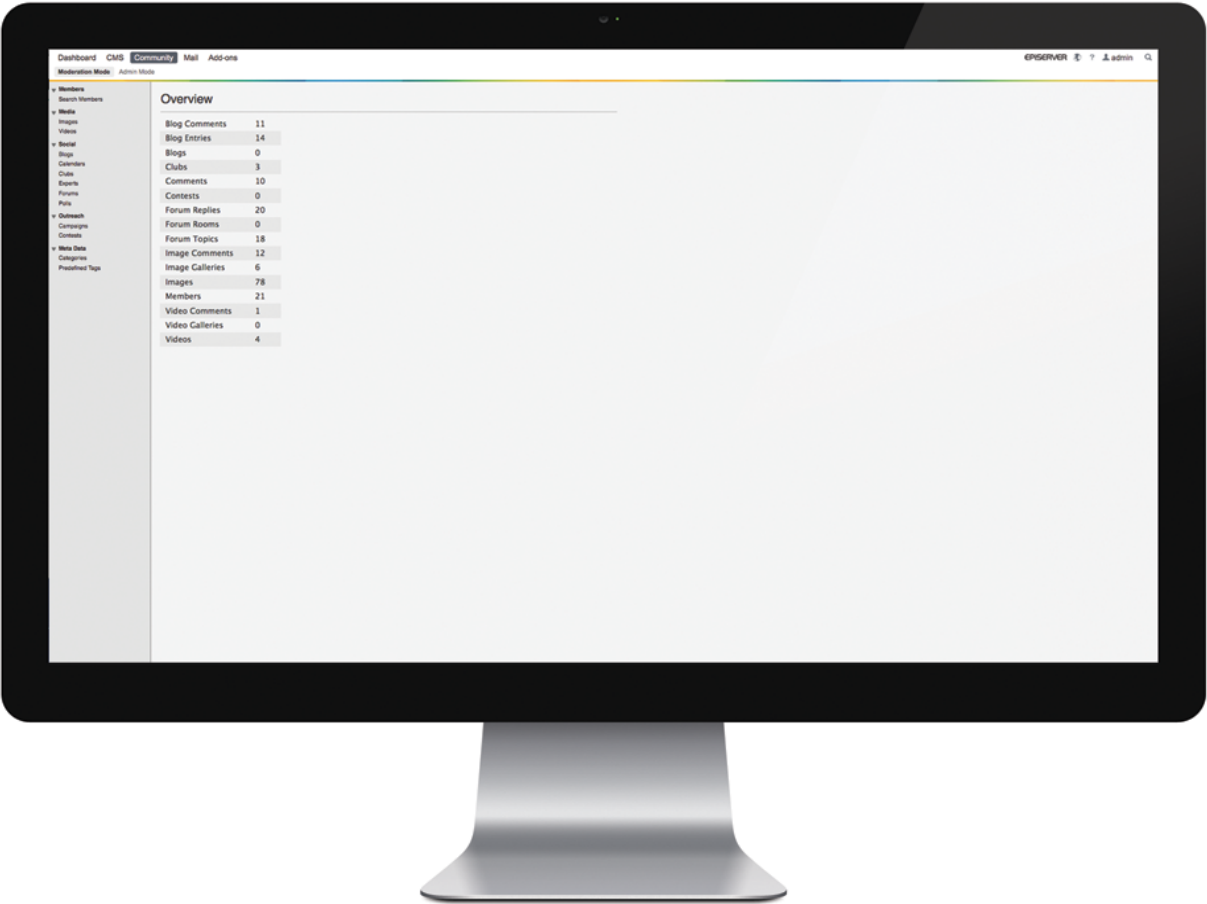




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Introduction

This is the **User Guide for EPiServer Relate**, a platform for building powerful collaborative websites and communication with community members. EPiServer Relate is based on EPiServer CMS and contains a set of display page templates together with community core functionality and EPiServer Mail for the creation of online newsletters.



This User Guide provides guidance to the usage of the various functions of EPiServer Relate, both within Community administration and moderation, as well as content management for your website. The purpose of the EPiServer Relate sample site, which is described here, is to provide an example of how you can work with EPiServer Relate, in order to get your community up and running in as little time as possible.

For an overview of the functionality of EPiServer Relate, please refer to the EPiServer Relate *Function Description* available on EPiServer World.

About This Documentation

Target Groups

This documentation is intended for the target groups as described below.

- The **EPiServer Relate User Guide**:
 - Content editors working in EPiServer CMS and EPiServer Mail.
 - Community moderators and administrators working in the Community Moderation and Administration interface.
- The **EPiServer Relate Function Description**:
 - System architects, developers and others with a more technical background evaluating community website platforms.

References

This documentation describes features in EPiServer Relate. Features in EPiServer CMS and EPiServer Mail will not be covered here. Therefore, the following documentation available from world.episerver.com, may be useful:

- User documentation for editors of EPiServer CMS.
- User documentation for administrators of EPiServer CMS.
- User documentation for EPiServer Mail.

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

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About EPiServer Relate

Introduction

EPiServer Relate provides the foundation for building a powerful community solution with advanced content management possibilities on top.

EPiServer Relate is based on the EPiServer platform and contains the following parts:

- EPiServer CMS providing content management functions such as globalization and personalization.
- A set of **page and block templates** with examples of how to display content in a community environment.
- A **Community core** with community features such as forums and blogs as well as commenting, rating and tagging.
- EPiServer Mail, for creating newsletters in EPiServer CMS based on website content and community associations.

The EPiServer Relate Sample Site

EPiServer Relate comes with a sample site including a complete set of page templates containing all the necessary functions for setting up a community website. The purpose with the sample site is to exemplify and illustrate the code behind the templates, and to provide inspiration when building your own community solution. Refer to the *Sample Site* section for more information.

Function Overview

Introduction

This section provides an overview of the functionality of EPiServer Relate. The main parts are the **Community** module for community administration and moderation, and **EPiServer CMS** for managing and displaying website content. EPiServer Relate also includes EPiServer Mail for creating and distributing newsletters.

Community Framework

The Community Framework includes the following functions:

- **Categories** - content can be categorized and retrieved based on one or more categories.
- **Tags** - content can be tagged and retrieved through the drawing of tag clouds.
- **Ratings** - any community entity can be rated and average rating of entities can be calculated.
- **Visits** - the number of visits can be retrieved for content pages.
- **Commenting** - commenting of content and other comments.
- **Abuse Reporting** - manages abuse reporting of any type of content.
- **Custom Attributes** - used for connecting fields to Relate modules, for instance "location".
- **Dynamic Queries** - searching of content in all community entities, with sorting functionality.

Community Modules

The following modules are included:

- **Member** - personal information for a member, aggregates information from other community functions.
- **Blogs** - tool for managing personal blogs.
- **Forums** - functionality for creating discussion possibilities in the community.
- **Clubs** - clubs have functionality for news, messaging, and image galleries.
- **Image and Video Gallery** - functionality for sharing images and videos.
- **Contest** - a function for providing interactivity through contests.
- **Messaging** - functionality for managing messages and contacts between members.
- **Calendar** - functionality for creating and managing calendars and events.
- **Expert** - possibility to assign external or internal experts within a community.
- **Poll** - tool for creating and conducting polls in a community.
- **Campaign** - functionality for creating referrals and campaigns in the community.
- **Group** - for creating collaboration groups sharing a common interest in the community.

Content Management

Editing Content

Web editors will work inside the EPiServer CMS editorial interface to update content of web pages. For instance editors can create news or articles and relate these to clubs in the community.

The EPiServer Relate page types in the sample site do not require much editorial work, since most of these are only for display purposes fetching data from elsewhere.

Administering the Website

The EPiServer CMS administration interface is where you will manage the administrative tasks for the website. These may involve setting access rights for EPiServer CMS web pages in the page tree structure, configuration of page types, management of scheduled jobs, and globalization settings.

For more information, refer to the user documentation for EPiServer CMS.

Newsletters

With EPiServer Mail you manage the entire process of creating and distributing newsletters through e-mails. You can manage recipients and sendlists, create newsletters based on page types and content in EPiServer CMS, and follow up the recipient statistics for a newsletter.

For more information, refer to the user documentation for EPiServer Mail.

Roles

Introduction

Community access rights can be set up in many different ways. Typically, anonymous visitors to the website can only view public content. In order to view community content, to contribute and to interact with members in the community, registration is required.

An EPiServer Relate installation is based on a setup of certain roles with specific tasks and access rights. The description in this documentation reflects these roles in order to make it easier to understand the underlying work procedures.

Visitor

A **Visitor** is someone using a web browser to visit the website and use available functions and services. In EPiServer Relate, visitors are anonymous, cannot create content and will only have access to public content.

Member

A **member** is registered and logged on to the website. Community members will have access to community content, and can interact with the website and other members to create community content such as forum postings and comments.

Owner

An **owner** is a community member who is the creator of certain community content, for instance an image gallery, a club or a forum posting. Owners can administer community content that they themselves have created.

Website Editor/Moderator

The **editor/moderator** can belong to either roles but in the EPiServer Relate sample site it is assumed that the Editor/Moderator works with both content editing as well as moderating community content. The Editor/Moderator has access to the EPiServer CMS Edit mode as well as the Community Moderation/Admin mode. May also use OnlineCenter and gadgets to monitor community activities.

A community member can also be given moderator access rights without having access to the EPiServer CMS edit mode, allowing for instance to moderate forums from View mode.

Website Administrator

The **administrator** administers the website, works with access rights and adapts the platform to suit the needs of the organization. The Administrator has access to the EPiServer CMS Edit and Admin mode, as well as the Community moderation and administration interfaces.

Website Owner

The **website owner** is someone with an overall responsibility for one or more websites. Creates content occasionally, approves and publishes content created by others, and uses OnlineCenter and gadgets to monitor website activities. May also be a marketer with a market perspective.

Refer to *Access Rights* for more information on community access rights.

Community Procedures

Introduction

Creating and moderating a community and creating editorial content involves a number of functions and roles. The EPiServer Relate sample site is an example site with some typical community features, with the purpose to illustrate possible ways of working with a community.

The following features are included:

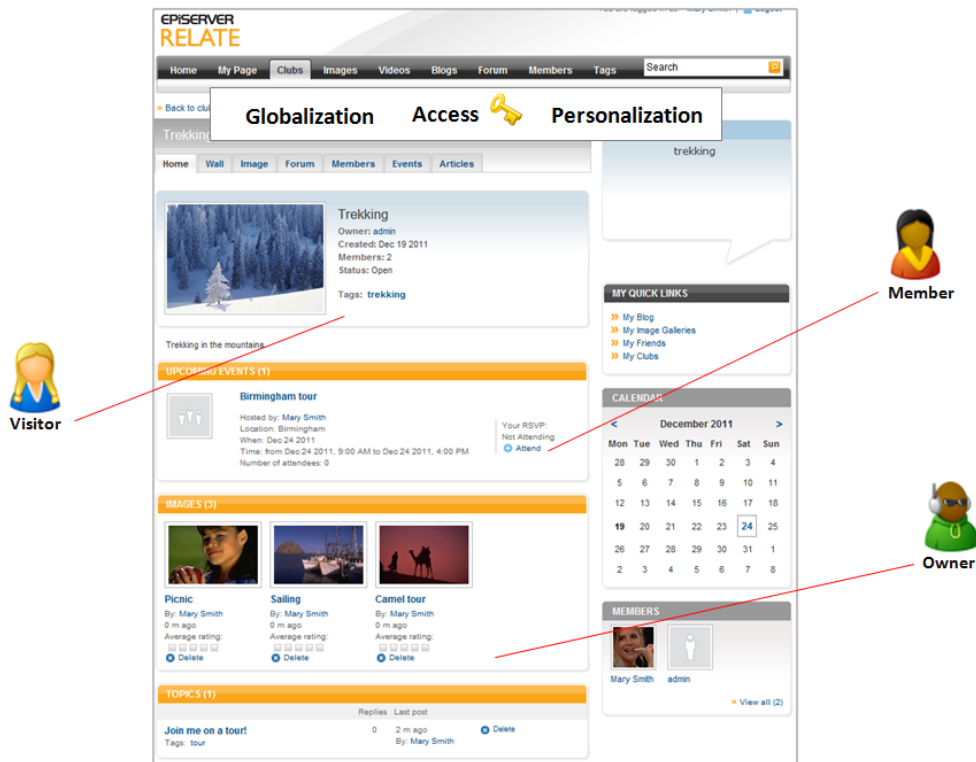
- **Community start page**
- **Club pages**
- **Images and Video Galleries**
- **Blogs**

- **Forums**
- **Members**

An overview of the procedures and related roles and tasks are described here. Community access rights can be set up in many different ways, in this example a common scenario is used.

The Community in View Mode

In an active community, much of the content is created by the members. Depending on the type of community, there may also be editorial content created by the actual website owner. The content on a community web page is therefore built up by different contributors, and may also appear differently depending on who is viewing the page.

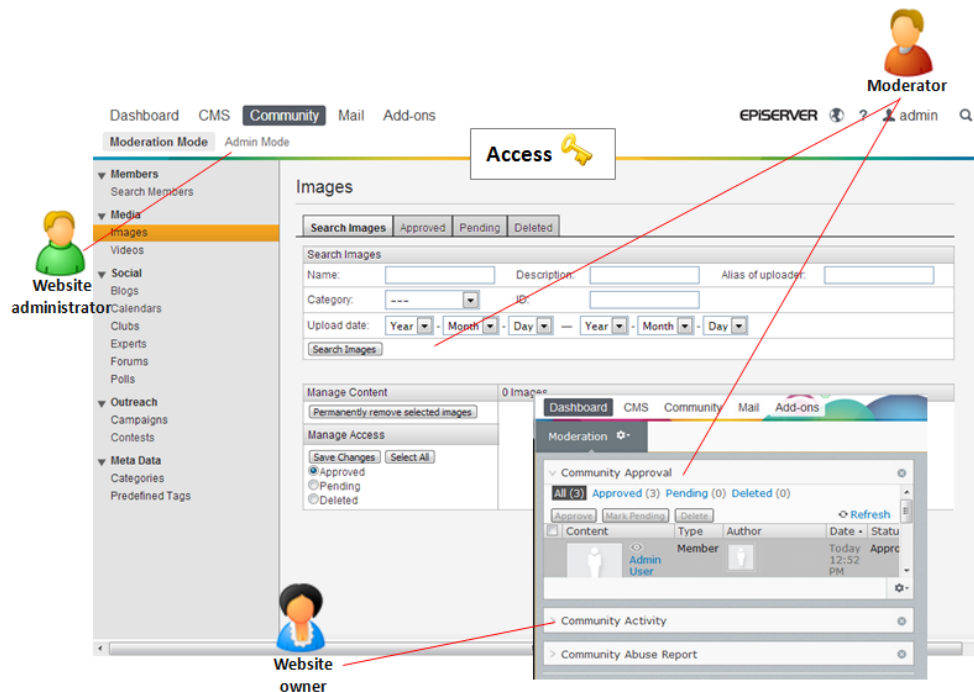


- When someone accesses the website, with or without logging in, **access rights** will be checked and applied, controlling what the user can do and where on the website.
- If **personalization** is applied on the website, targeted content may be displayed. This is editorial content created by the owner of the website and targeted towards specific groups.
- If the site is multilingual and **globalization** is implemented, content may be displayed in different languages depending on the user preferences.
- An unregistered **visitor** can access content from view mode, but cannot contribute. Closed content, for instance closed clubs, cannot be viewed.
- A **member**, which is a registered visitor with a member profile, can access all content that is not closed to specific member groups. Members can participate in discussions, post blogs, images and videos, rate and comment on content created by other members, and create clubs.
- A member becomes an **owner** of the content he or she has created. Owners can change and delete content created by themselves, but not content created by other members.

Find out more in the *Sample Templates* and *General Functions* sections.

Community Administration and Moderation

A community will usually have one or more moderators and administrators. Moderators will monitor the different types of content added by community members, and take actions if something inappropriate is posted. Members can abuse report inappropriate community activities, and the moderator will manage the abuse reports.

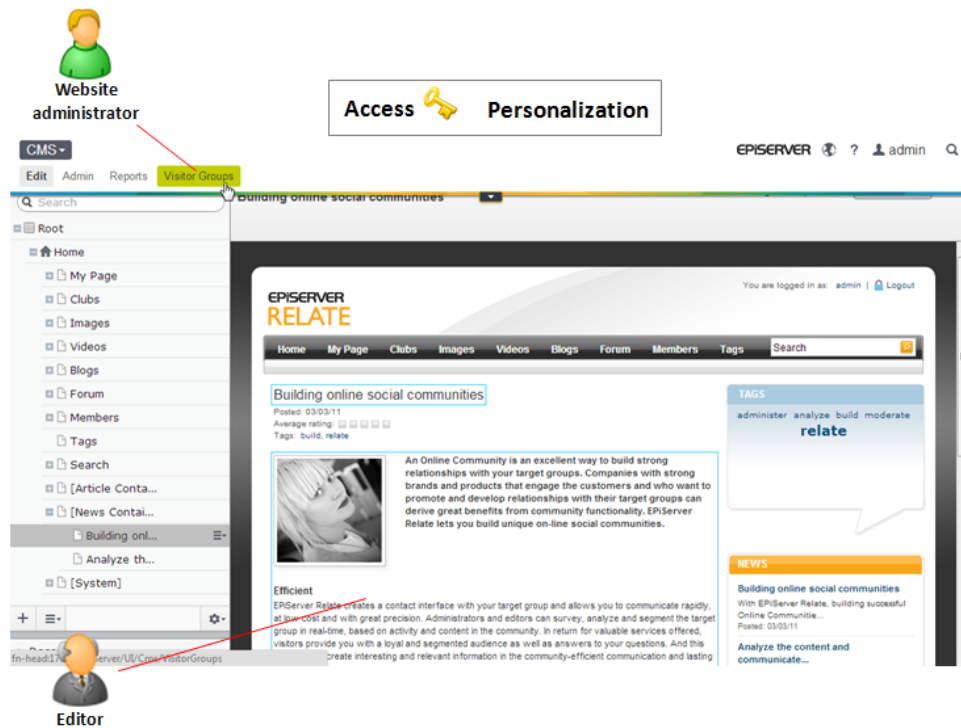


- A community **moderator** may be the same role as the website editor, but a moderator can also be one or more trusted community members which will then be given access to the community moderation mode, from where for instance forums can be monitored.
- Community activities can also be easily monitored from the OnlineCenter Dashboard by using available community gadgets. This is useful for the website administrator and also for the **website owner** who wants to be in control of community activities.
- The **website administrator** may be the one that manages access rights for both community moderators and administrators. There may also be a separate community administrator. The community moderator may also be the same as the community administrator. Community administration involves controlling access rights in the community moderation mode.

Find out more in the *Community Moderation* and *Community Administration* sections.

Editing and Administering Content

Editorial content here is content that is created by editors from the EPiServer CMS edit mode. This type of content may be personalized and associated with community features such as clubs or forums.



- Website **editors** can create content, for instance news or articles, and link them to for instance a community forum or a club. The news item and the article will then be displayed to forum participants and club members. Editors can also apply personalization criteria to selected content, to make this display to targeted groups in the community.
- **Website administrators** are the ones creating the visitor groups based on available personalization criteria, from the EPiServer CMS edit mode (you will need admin access to do this). The visitor groups are then used by editors when applying personalization to targeted content.

Find out more in the *Managing Content* section.

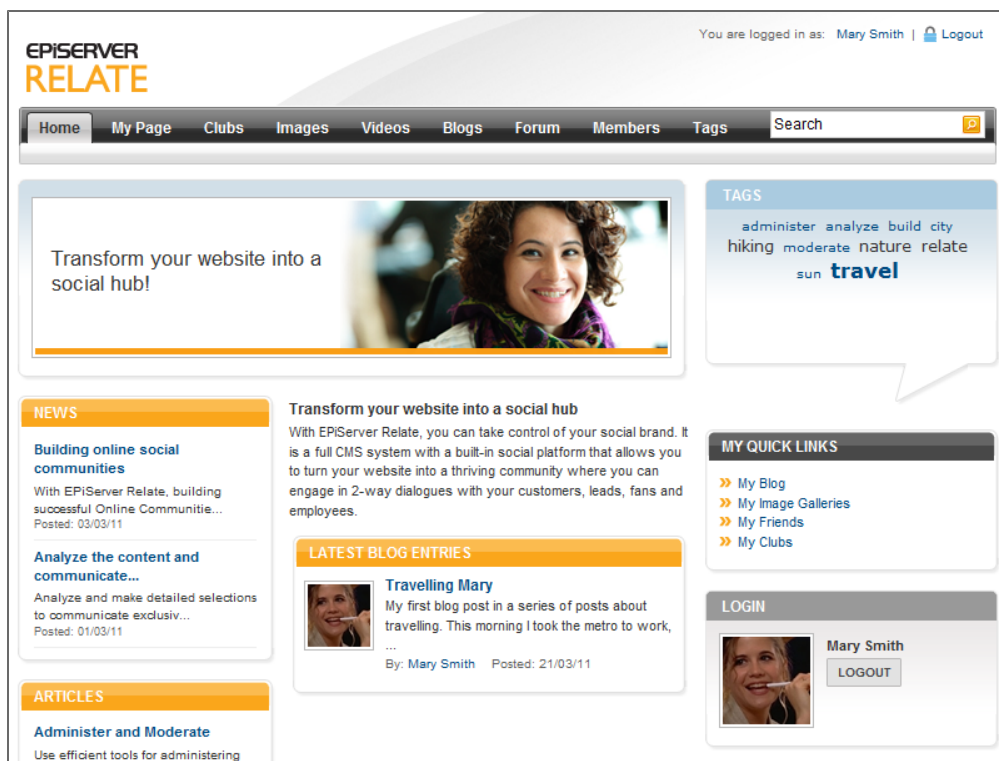
Getting Started

Introduction

This section describes how you can log in to an EPiServer Relate website, and access and navigate the different modes. Note that the login procedures may be different from what is described here, depending on how your website and infrastructure is set up. The examples described here are based on a standard sample installation of EPiServer Relate.

When opening the website in a web browser, the start page will be displayed in **View** mode. Visitors that are not registered and logged in, will see listings of the latest content such as news, articles and blog entries. Tags are used to display “hot topics” in the community.

Visitors are only allowed to read content. To be able to contribute to the community and add content, visitors must register and become members. In the right column there is a registration/login area where visitors can register and log on to the site.



Logging In

As an editor or administrator, you usually log in to your website using a specified URL or a log in button. The start page in this example has a login box area where you can register and enter your user name and password to log in. Lost passwords can also be retrieved from here. Enter your log in credentials and click **Login**.

OpenID

If you are a member of several communities, it can be a hassle to manage all your online identities. EPiServer Relate therefore supports for **OpenID**, when signing up or signing in to a community built using EPiServer Relate. Select a provider among the options, enter your login credentials and you will be logged in to the website.

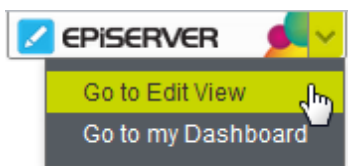
Members

When you as a registered member log in to website, the start page will change to display the personal page showing your member profile. This is also known as **My Page**.

If you display the start page of the website as a logged on member, the login box will have changed to display your name and a personal image, if you have added one to your profile. You will also be given the option to log out from the website.

Access Options

You access EPiServer Relate through the Edit View, provided that you have the proper access rights for your user account. Select **Go to Edit View** and proceed to the editing view.



You can also go directly to your personal Dashboard by selecting the **Go to my Dashboard** option.

Navigation

When logged in, use the **global menu** available at the very top to navigate your way around. In the menu you will find the different systems integrated with your website.



From here you can access all parts of EPiServer Relate - **Community** for community *moderation* and *administration*, **CMS** for *managing website content*, and **Mail** for *managing newsletters* on your site.

Selecting **Community** in the global menu will expand a submenu where you can select **Moderation Mode** or **Admin Mode**, depending on what you want to do.



The options in the submenu may vary depending on your access rights. In the examples in this documentation we have assumed that the user has full permissions to all functions in EPiServer Relate.

General Functions

This section describes some community specific central functions in the EPiServer Relate community platform., features that are vital in order to create a dynamic and interactive community with a personal user experience. These functions are for instance tagging and categorization, different types of feeds and personalization possibilities.

EPiServer Relate is essentially a set of sample templates with a community engine, and based on EPiServer CMS for content management. EPiServer CMS is used for features such as globalization and file management, refer to the User Guide for EPiServer CMS for more information about these areas.

Categories

Categories are a way to group, but also separate, items in an EPiServer Relate community implementation. For example you could separate images, blog posts or messages into public and private by creating and assigning categories. Categories are defined in **community Moderation mode**, are global and can be applied to any community entity type. Categories are stored in a tree structure and can be nested in any way you wish. In the EPiServer Relate sample site you will find two predefined example categories, "Business" and "Leisure", which can be used for categorizing community content.



There are also categories in EPiServer CMS, but these can only be used for categorization of web pages created with EPiServer CMS, whereas community categories are used for all types of community content.

Tags

Introduction

Tags are used to label content with simple descriptions. A **tag cloud** is a visual depiction of tags where each word is a link to content tagged with that word. In a tag cloud the importance of a word is shown with font size or color. Tags can also be used to help members to find specific information. EPiServer Relate supports both **predefined** tags for when you want a strict, controlled set of tags, and **free text tags** that allows community members to label content with any short text.

Each of the sections in the EPiServer Relate sample site templates will have their own tag cloud. For instance there will be a tag cloud for images, blogs and forums, visualizing what are currently "hot words" in that particular section. The **Tags** section shows tags for the entire community, same as the start page tag cloud.

1 BLOG ENTRIES TAGGED WITH GOLF

**Connemara Golf club**

Posted: Jun 02 2010 By: Annika Jansson

At the Edge of Europe on the wild Atlantic coast lies a links course that is a challenge to all who play her. Nestled between the mountains and the sea in the West of Ireland, the Connemara Championship Golf Links is an exhilarating golfing exper...

Tags: [connemara](#), [golf](#)

Comments: 1

Views: 8

Average rating:


[Delete](#)

1 IMAGE GALLERIES TAGGED WITH GOLF

**Golf**

Number of images: 5

Jun 02 2010

[Delete](#)

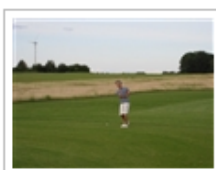
10 IMAGE(S) TAGGED WITH GOLF

**Golf at Fopp...**

By: Annika Jansson

Jun 02 2010

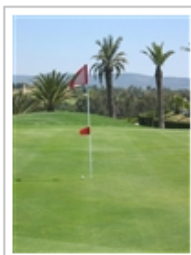
Average rating:


[Delete](#)
**Golf at Ombe...**

By: Annika Jansson

Jun 02 2010

Average rating:


[Delete](#)
**Golf in Tuni...**

By: Annika Jansson

Jun 02 2010

Average rating:


[Delete](#)
**Golf at Ombe...**

By: Annika Jansson

Jun 02 2010

Average rating:


[Delete](#)
[1](#) [2](#) [3](#) [Next](#) [Last](#)

1 CLUB(S) TAGGED WITH GOLF

**Golf**

If you haven't seen Jesper Parnevik swing, you haven't seen anything

Owner: [Admin User](#)Tags: [golf](#)

Created: 02/06/10

Members: 7

Status: Open

[Leave Club](#)

Tags are also hyperlinks and clicking on a tag will take you to a listing of community items, for instance blog entries, clubs or images, associated with that tag. A tag can also be linked to the name of a community member, in which case content associated with that specific member will be listed.

Tag Roles

Visitors

Visitors to the website can see tag clouds for all of the community sections, and can click on all tags to display associated content items.

Members

Community members that are logged on to the website, can add tags to the content they create in the various community sections. Tags are added using comma separation.

Owners

Content owners, that is the creator of the content item such as an image or a topic, can update tag information associated with a specific item.

Editors/Moderators

The page type Tags provides a display for tags. The page contains no editorial information, it is only used for providing a display format. You only have to provide a name for the page and then save and publish it.

Configuring the Tags Page

The tags page created here must be pointed out under Site settings in the start page configuration described earlier.

Rating

Rating is a common function in communities allowing members to rate or "like" for instance blog or forum postings or images. In EPiServer Relate, all types of content can be rated by community members. In the EPiServer Relate sample site, rating is available for member created content such as blog entries, images and videos, as well as editorial content such as articles. The rating functionality can also be used as a foundation for building a "Likes" feature.

Visits

The **Visits** functionality in EPiServer Relate is used for the "Latest Visitor" feature on the profile page of a community member, a common feature in many community sites. This allows the user to see who has visited the profile page, with links to each of the visiting members individual profiles.

Commenting

The **Commenting** feature in EPiServer Relate makes it possible to comment on community content, for instance blog entries or forum postings. In the EPiServer Relate sample site users have to be registered and logged in to be able to comment, but this can be set up as desired to allow for anonymous commenting as well. All types of content can be commented, and even comments can be commented.

Feeds

RSS and ATOM

Sharing and collecting information should be easy. All information within the community can be shared using a built in web service together with the open standards RSS and Atom. This means that you can subscribe to updates in an RSS reader or integrate with an external system using the Atom feeds.

When content can be shared in EPiServer Relate, you will see a "Subscribe" box. The following content can be shared:

- News feed and Mini feed.
- Blog entries and blog entry comments.
- Forum topics and forum topic replies.



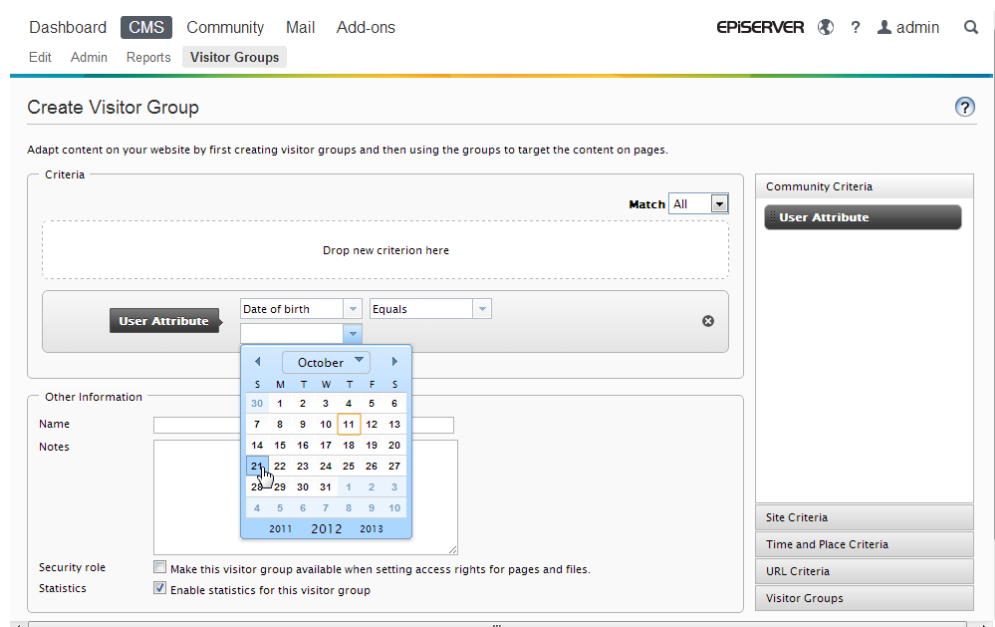
Abuse Reporting

Most communities have a reporting function, allowing community visitors to report inappropriate content. The **Abuse Reporting** functionality in EPiServer Relate makes it possible for community members to report any type of community content, for instance images or blog entries. A snapshot of the content is produced when the abuse report is made.

The reports are then managed by a community administrator or moderator. This can be done either from the EPiServer Relate **community moderation mode**, or through the use of the **Community Abuse Report gadget** in EPiServer Relate. This gadget is available from the website **Dashboard**, for easy access by administrators. Refer to the *Gadget* section to find out more about gadgets in EPiServer Relate.

Personalization

The **Personalization** feature in EPiServer Relate makes it possible to target content for different visitor groups, providing a more personal website experience. Personalization criteria for community members are included in EPiServer Relate. This makes it possible to target content to community members based on their profile information. The profile criteria can be used in combination with EPiServer CMS, for instance to display adapted content to a selected group.



The profile criteria can easily be updated to be used by EPiServer CMS editors, as well as for creating mailing lists in EPiServer Mail. Find out more about personalization in the user documentation for EPiServer CMS.

The **User Attribute** community personalization criteria is available in the main menu under **Visitor Groups > Community Criteria**.

Attributes

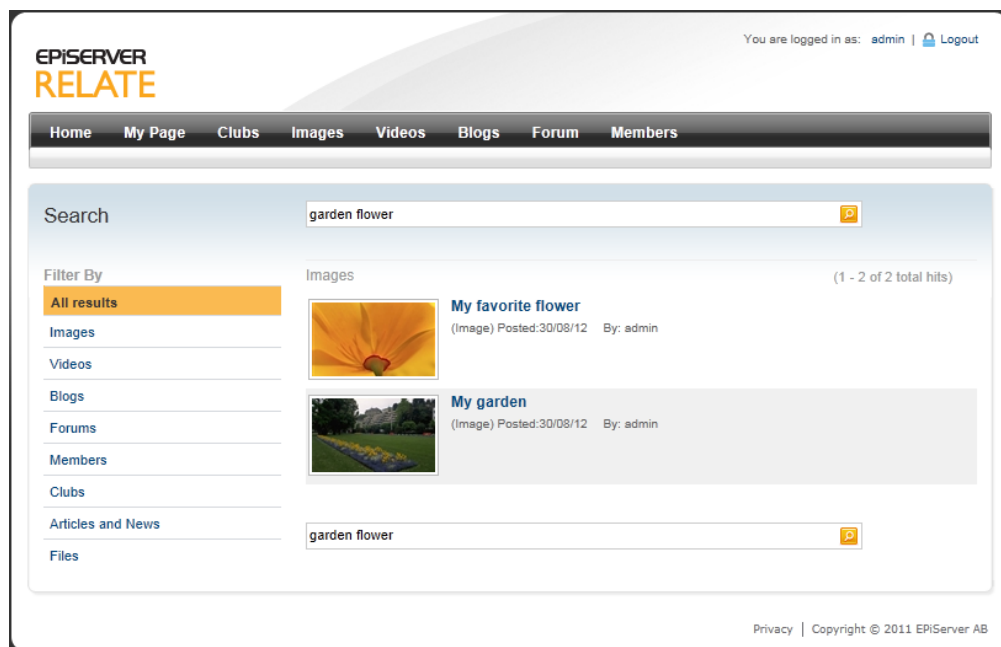
Attributes are useful when you wish to extend the community functionality of EPiServer Relate. Any number of attributes of any type can be associated with any entity in EPiServer Relate. With **Custom Attributes** you can connect “fields” to all modules in EPiServer Relate, for example to a user profile. The custom attributes can be added through code or using the community Admin interface.

Search

The EPiServer Relate templates sample site uses search functionality based on the search engine **Lucene** which is part of the EPiServer **Framework**. The following content types can be configured to be indexed:

- Blog entries and comments
- Clubs and content within clubs
- Forum topics and replies
- Images and image comments
- Members
- Videos and video comments
- Articles and files created by content editors

Search results can be filtered based on the types above.



The search also handles access rights. For example, in a search result list you will find content within closed clubs only if you're a member of that particular club. Only approved content will be indexed. Tags are not included in the search.

Gadgets

Introduction

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*.

Gadgets in EPiServer Relate

The following gadgets are available in a standard installation of the EPiServer Relate community platform:

Community Approval

The **Community Approval** gadget makes enables EPiServer Relate community administrators to approve community content that has been added by community members. Depending of the setup of the community, you can define the type of content that should be subject to approval. The gadget provides an overview of the approval status, and you can view, approve or delete content from here.

Do the following to add and configure the Community Approval gadget:

1. Log in to EPiServer Relate and select **Dashboard** in the right-click menu.
2. Select the **Dashboard** tab under which you want the gadget to appear.
3. Select **Add Gadgets** in top left corner of the dashboard, and then select the **Community Approval** gadget by clicking on it in the list. The gadget will be displayed on the dashboard.
4. By selecting **Edit** in the drop-down menu of the gadget, you can set the number of items on the page, if system generated content should be displayed, and the type of content to include in the approval process.
5. Click **OK** to save you changes. The gadget will be displayed on your dashboard.

Do the following to use the Community Approval gadget:

1. Log in to EPiServer Relate, select **Dashboard** in the right-click menu and select the **Dashboard** tab under which the **Community Approval** gadget is located.
2. You can chose to view all approval items, or filter them according to their status – **Approved**, **Pending** or **Deleted**. Click **Refresh** to update the list if needed.
3. Select one or more approval items for which you want to update the status, by selecting the check box to the left of each comment. Select the top left check box to select all comments displayed in the list.
4. Select the status you want to apply - **Approve** or **Delete**.

Community Abuse Report

The **Community Abuse Report** gadget enables EPiServer Relate community administrators to manage abuse reports that have been created by community members. Depending of the setup of the community, you can define the type of content that should be subject to abuse reporting. The gadget provides an overview of the abuse reporting status, and you can view and manage abuse reports from here.

Do the following to add and configure the Community Abuse Report gadget:

1. Log on to EPiServer Relate and select **Dashboard** in the right-click menu.
2. Select the Dashboard tab under which you want the gadget to appear.
3. Select **Add Gadgets** in top left corner of the dashboard, and then select the **Community Abuse Report** gadget by clicking on it in the list. The gadget will be displayed on the dashboard.
4. By selecting **Edit** in the drop-down menu of the gadget, you can set the number of items on the page, the number of reports to display for each case, and the type of content to include in the abuse reporting process.
5. Click **OK** to save you changes. The gadget will be displayed on your dashboard.

Do the following to use the Comment Abuse Report gadget:

1. Log in to EPiServer Relate, select **Dashboard** in the right-click menu and select the **Dashboard** tab under which the **Community Abuse Report** gadget is located.
2. Select the abuse report cases you want to manage by selecting the check box to the left of each comment. Select the top left check box to select all cases displayed in the list.
3. Click **Mark Handled** to set the abuse report case to status "handled". Select **Ignore** to leave the abuse report case without any actions.

Community Activity

The **Comment Activity Report** gadget enables EPiServer Relate community administrators and website owners to get a graphical overview of the community activity. You can define the community segments and time intervals for which you want to monitor the activity.

Do the following to add and configure the Community Activity gadget:

1. Log in to EPiServer Relate and select **Dashboard** in the right-click menu.
2. Select the **Dashboard** tab under which you want the gadget to appear.
3. Select **Add Gadgets** in top left corner of the dashboard, and then select the **Community Activity** gadget by clicking on it in the list. The gadget will be displayed on the dashboard.
4. By selecting **Edit** in the drop-down menu of the gadget, you can define the community segments (images, videos, forums, blogs and clubs) you want to monitor, and the date range of interest. If no date range is selected, you will be able to toggle between day, month and quarter for the graph. You can choose to monitor all activity, or a selection of up to four community segments.
5. Click **OK** to save you changes. The gadget will be displayed on your dashboard.

Community Moderation

This section describes the community **moderation features** in EPiServer Relate. Community moderation involves tasks to monitor and moderate content created by community members. This type of content is typically forum postings, blog entries, comments and images and videos uploaded by members. Depending how your community is set up, moderation can be done by website editors or administrators, or by appointed community members with access to the community moderation interface.

Members

This section describes the functionality under the **Members** section of the EPiServer Relate Community Moderation interface.

Search Members

Introduction

The **Search Members** function is based on the search functionality of EPiServer Relate. Refer to the *Search section* of this documentation to find out more.

The **Search Members** section of the user interface contains two tabs; the **Search** tab which contains the member search UI and the **Approve Portrait** tab where you can review and approve user portraits.

Search Tab

The **Search** tab contains two alternatives for searching for users - simple search and extended search. Use the **Simple** and **Extended** sub tabs to switch between the two search modes.

Simple Search

Simple search allows you to search using standard variables such as name, username and e-mail address. For example, you can search for users with the last name "Ericsson" and who have an e-mail in the "company.com" domain.

The values entered into the string fields do not have to appear in the beginning of the user's attribute value. For example, searching for last name "son" will find users with the last name "Ericsson" and "Sonntag".

The Status drop down list allows you filter the search result list to only return users that are Approved, Pending or Deleted. Use the All setting to display all users matching the criteria regardless of their member status.

Use the radio buttons at the bottom of the search form to specify if you want to search for users that match all the criteria or if you want to search for members matching any of the criteria.

Extended Search

Under **Extended** tab it is possible to do a more detailed search with more variables. In addition to the fields available from the **Simple** tab the **Extended** tab contains extra fields that can be used to construct search criteria. The number of variables depends on how many variables you have set for each user in your installation.

The search results are displayed in the same window as the simple search results.

Searching for Members

1. From the **Search** tab select either the **Simple** or the **Extended** sub tab.
2. Enter the search criteria you want to search for in the appropriate field.

3. Select a value from the Status drop down list to only search for users with a specific status. Leave the setting to All you want to find users regardless of status.
4. Select whether you want the search to match all the specified fields or any of the specified fields.
5. Click **Search Users**.
6. The search results are listed below. Detailed information about users is displayed by clicking the alias in the search results, this opens the *My Page* window.

Approve Portrait Tab

The **Approve Portrait** tab contains the interface for moderators to review member portraits. The **Approve Portrait** tab contains three sub tabs - **Approved**, **Pending** and **Deleted**, each of the sub tabs presents a filtered view of the portraits based on the their approval state.

Approval States

A user portrait can be in one of three states:

- Approved - The portrait has been approved for use by a moderator.
- Pending - The portrait has been submitted by a member but has not yet been reviewed by a moderator.
- Deleted - The portrait has been reviewed by a moderator but it was not approved. The portrait image is still available in the system and can be moved to any of the other states.

Changing the Approval State of Portraits

To change the approval state of a portrait you must:

1. Select one of the sub tabs, e.g. select the **Pending** sub tab to view all portraits pending approval.
2. Use the radio buttons below the portrait to set its new state.
3. Click the **Save Changes** button.

It is also possible to change the state of all portraits with the same status:

1. Select one of the sub tabs.
2. Select the new state by using the **Approved**, **Pending** or **Deleted** radio button on the left.
3. Click the **Select All** button.
4. Click the **Save Changes** button.

Permanently Removing Portraits

It is important to differentiate between portraits that are in the Deleted state and portraits that have been permanently removed. Portraits in the Deleted state can still be moved to any of the other states but images that have been permanently removed are physically removed from the file system. A portrait can be permanently removed regardless of its current state - the moderator doesn't have to set the portrait to the Deleted state first.

To permanently remove a portrait you need to:

1. Select one of the sub tabs
2. Select one or more portraits by checking the checkbox in the top left corner.
3. Click the **Permanently remove selected images** button

My Page

My User Details Tab

The first automatically displayed view is the **My User Details** tab. This tab displays all user details and assigned attributes are automatically displayed here. Examples of attributes can be country, address, alias, hobbies etc. The number of attributes is unlimited in the EPiServer Relate community module.

My Image Gallery Tab

All images belonging to a user are stored in My Image Gallery. Moderators can see all images in a user's image gallery and approve, remove or hide them and can be viewed in the **My Image Gallery** tab. If users have structured their images in folders, the folders are displayed in sub-galleries. By default, the user's portraits are stored in a sub-gallery called portraits.

Double-click an image to open the *Image Information* window showing detailed information about the image.

Upload Images

Moderators can upload or download specific images to/from a specific user's archive.

1. Click **Upload Image** and browse to the image that you want to upload.
2. Add a description for the image in the Description field if desired and click **Upload Image**. The image is then uploaded into the user's image gallery.

Apart from the possibility to upload images the functionality of the **My Image Gallery** tab is identical to the *Images* section.

My Video Gallery Tab

The video gallery function stores and manages videos. Uploaded videos are automatically encoded into flash video, a widely spread Web-friendly format. Flash video provides fast, lightweight and platform-independent playback. The video gallery function generates image samples of every uploaded video and stores them in an image gallery bound to the video. The image samples provide a fast overview of the video, while saving performance and bandwidth.

Upload Videos

Moderators can upload or download specific videos to/from a specific user's archive.

1. Click **Upload Video** and browse to the video that you want to upload.
2. Add a description for the video in the **Description** field if desired and click **Upload**. The video is then uploaded into the user's video gallery.

Apart from the possibility to upload videos the functionality of the **My Video Gallery** tab is identical to the *Videos* section.

My Document Archive Tab

The documents and files that are uploaded to the user's document archive are stored under the **My Document Archive** tab as shown below.

Moderators can see a list of files and documents that have been uploaded to the user's document archive. The list also displays information about who uploaded the document or file, the size of the document and the date it was uploaded. If users have structured their documents and files in folders, the folders are displayed in sub-archives.

Upload/Download Documents

Moderators can upload or download specific documents or files to/from a specific user's archive.

1. Click **Upload Document** and browse to the document that you want to upload.
2. Add a description for the document in the **Description** field if desired and click **Upload Document**. The document is then uploaded into the user's document archive.
3. Download a document or a file by clicking the file name in the **Name** column in the list of documents for the specific user.

Remove Documents

Remove a document/file from the document archive by selecting the document to be removed and clicking **Remove Selected Documents**. The document is then removed from My Document Archive.

My Blog and My Guestbook Tabs

In this view the moderator can create, administer and delete blog entries or comments on a specific user's blog. The moderator can also set basic blog information.

The functionality of the **My Blog** and **My Guestbook** tabs is identical to the *Blog Information* window.

My Polls Tab

The **My Polls** tab is where a moderator manages a specific user's polls. The polls created by a specific user are listed as shown below. The functionality for managing user polls is identical to the functionality of the *Polls* section.

My Direct Messages Tab

The **My Direct Messages** tab displays messages sent between community members. Moderators can remove messages for one specific user. Users can store their direct messages in folders according to their needs. The default folders are Inbox, Draft, and Sent.

My Webmail Account Tab

The **My Webmail Account** tab displays the user's webmail account if he/she has one. An account can be created here by specifying an address and clicking **Create Account**. The account can also be disabled and removed.

Predefined Tags Tab

The interface on the **Predefined Tags** tab allows you to associate entities with different tags. You can use both predefined and free text tags. Predefined tags are defined in the *Predefined Tags* section.

Add a Tag

1. Either select a predefined tag from the **Predefined tags** list or manually enter a tag name in the **Tag** text box.
2. Click the **Add Tag** button.
3. Click the **Save Information** button on the **Information** tab.

Remove a Tag

1. Click the **Remove Tag** button next to the name of the tag you wish to remove.
2. Click the **Save Information** button on the **Information** tab.

Categories Tab

The **Categories** tab lists all the categories that have been defined in the *Categories* section in Moderation Mode. Categories that are currently associated with the entity have a checked checkbox next

to their names.

Edit the Category Associations

1. Check the checkboxes next to the names of the categories you wish to associate with the blog.
2. Uncheck the checkboxes next to the names of the categories you no longer wish to associate with the blog.
3. Click the **Save Information** button on the **Information** tab.

Attributes Tab

The **Attributes** tab displays the attribute values, if any, for this entity. The number and type of attributes are different for different implementations of EPiServer Community - the **Attributes** tab in your solution may contain several or perhaps no attribute values. Attributes are defined from the Attributes section in Admin Mode.

Media

This section describes the functionality under the **Media** section of the EPiServer Relate Community Moderation interface.

Images

Introduction

The Images section contains tools for searching for images and changing the approval state of images. The section is split into four different tabs - **Search Images** from where you can search for images base and the **Approved**, **Pending** and **Deleted** tabs showing the image list based on approval state. Clicking an image in the search results or on any of the approval state tabs will open the *Image Information popup* for that image.

Searching for Images

The Search Images tab contains a simple search UI that allows you to search using standard variables such as name, description and uploader alias. For example, you can search for images uploaded by the user "member" where the image name contains "nature".

The values entered into the string fields do not have to appear in the beginning of the image's attribute value. For example, searching for name "all" will find images with the name "**all**Participants" and "**Tall**Man".

Search for a specific image by entering the appropriate search criteria and clicking **Search Images**. Leave the search criteria blank if you want to search for all images. If a query returns more than 50 images the result list is divided into pages that can be navigated using the pager at the bottom of the list.

Changing the Approval State of Images

Approval States

Each of the **Approved**, **Pending** and **Deleted** tabs each displays all images in the corresponding approval state. An image portrait can be in one of three states:

- **Approved** - The image has been approved for use by a moderator.
- **Pending** - The image has been submitted by a member but has not yet been reviewed by a moderator.
- **Deleted** - The image has been reviewed by a moderator but it was not approved. The image is still available in the system and can be moved to any of the other states.

Changing the Approval State of Images

There are three possible approval states for a portrait.

1. Select one of the sub tabs, e.g. select the **Pending** sub tab to view all images pending approval.
2. Use the radio buttons below the portrait to set its new state.
3. Click the **Save Changes** button.

It is also possible to change the state of all portraits with the same status:

1. Select one of the sub tabs.
2. Select the new state by using the **Approved**, **Pending** or **Deleted** radio button on the left.
3. Click the **Select All** button.
4. Click the **Save Changes** button.

Permanently Removing Images

It is important to differentiate between images that are in the Deleted state and images that have been permanently removed. Images in the Deleted state can still be moved to any of the other states but images that have been permanently removed are physically removed from the file system. An image can be permanently removed regardless of its current state - the moderator doesn't have to set the image to the Deleted state first.

To permanently remove an image you need to:

1. Select one of the sub tabs
2. Select one or more images by checking the checkbox in the top left corner.
3. Click the **Permanently remove selected images** button.

Image Information

Introduction

The Image Information window allows you to view and change settings for an image. The different settings are divided into five different tabs - **Image Information**, **Image Comments**, **Predefined Tags**, **Categories** and **Attributes**.

Image Information Tab

The default tab that is opened when bringing up the window is the **Image Information** tab. In this tab you will find the most basic information about the image - the name of the member who uploaded it, the time it was uploaded etc. Clicking the member name will bring up the My Page dialog for that member. There are also two buttons available from this tab - **Download original** which lets you save the image file to your local computer and **Save** which will apply any changes made in the window dialog.

Image Comments Tab

The **Image Comments** tab displays the comments, if any, that members have posted for the image.

Predefined Tags Tab

The interface on the **Predefined Tags** tab allows you to associate entities with different tags. You can use both predefined and free text tags. Predefined tags are defined in the *Predefined Tags* section.

Add a Tag

1. Either select a predefined tag from the **Predefined tags** list or manually enter a tag name in the **Tag** text box.
2. Click the **Add Tag** button.
3. Click the **Save Information** button on the **Information** tab.

Remove a Tag

1. Click the **Remove Tag** button next to the name of the tag you wish to remove.
2. Click the **Save Information** button on the **Information** tab.

Categories Tab

The **Categories** tab lists all the categories that have been defined in the *Categories* section in Moderation Mode. Categories that are currently associated with the entity have a checked checkbox next to their names.

Edit the Category Associations

1. Check the checkboxes next to the names of the categories you wish to associate with the blog.
2. Uncheck the checkboxes next to the names of the categories you no longer wish to associate with the blog.
3. Click the **Save Information** button on the **Information** tab.

Attributes Tab

The **Attributes** tab displays the attribute values, if any, for this entity. The number and type of attributes are different for different implementations of EPiServer Community - the **Attributes** tab in your solution may contain several or perhaps no attribute values. Attributes are defined from the Attributes section in Admin Mode.

Video

Introduction

The **Video** section allows moderators to manage video content on the site. The section is divided into three tabs - **Approved**, **Pending** and **Deleted**. All tabs list videos on a pane grid, the pane grid can be set to 2 or 4 panes in width by clicking the grid icons.

Changing the Approval State of Videos

Approval States

Each of the **Approved**, **Pending** and **Deleted** tabs each displays all images in the corresponding approval state. An image portrait can be in one of three states:

- **Approved** - The video has been approved for use by a moderator.
- **Pending** - The video has been submitted by a member but has not yet been reviewed by a moderator.
- **Deleted** - The video has been reviewed by a moderator but it was not approved. The video is still available in the system and can be moved to any of the other states.

Changing the Approval State of Videos

There are three possible approval states for a video.

1. Select one of the sub tabs, e.g. select the **Pending** sub tab to view all videos pending approval.
2. Use the radio buttons below the video to set its new state.
3. Click the **Save Changes** button.

It is also possible to change the state of all videos with the same status:

1. Select one of the sub tabs.
2. Select the new state by using the **Approved**, **Pending** or **Deleted** radio button on the left.
3. Click the **Select All** button.
4. Click the **Save Changes** button.

Permanently Removing Videos

It is important to differentiate between videos that are in the Deleted state and images that have been permanently removed. Videos in the Deleted state can still be moved to any of the other states but videos that have been permanently removed are physically removed from the media service. A video can be permanently removed regardless of its current state - the moderator doesn't have to set the image to the Deleted state first.

To permanently remove a video you need to:

1. Select one of the sub tabs
2. Select one or more videos by checking the checkbox in the top left corner.
3. Click the **Permanently remove selected images** button.

Social

This section describes the functionality under the **Social** section of the EPiServer Relate Community Moderation interface.

Blogs

Introduction

In the **Blogs** section moderators can search for blogs, create new blogs, administer and delete blogs, blog entries or comments.

Search for blogs by entering the search criteria in the **Search Blogs** tab and click **Search Blogs**. The search results appear in the lower section of the window displaying the blog name and creation date, number of entries and information about whether the blog is currently active.

Creating a Blog

A common scenario when implementing a community site is that blogs are automatically created for members when they sign up. However, the **Blog** section allows moderators to manually create blogs should the need arise. To create a blog you need to:

1. Click the **Create Blog** button in the upper section of the **Search Blogs** tab. This will open a Blog Information popup.
2. Enter a name for the blog in the **Name** field.
3. Optionally add a presentation text and a presentation image for the blog.
4. Select whether you want the blog to be active or inactive.
5. Click **Save Information** to save the information and create the blog.

Searching for Blogs

The search interface allows you to search for blogs using different criteria such as name, number of entries and creation date. For example, you can search for blogs with more than five entries that have been created this year.

To search for specific blogs fill out the criteria values to match and then click the **Search Blogs** button. You can leave the value fields empty to list all existing blogs. Search results are displayed in a list below the criteria interface.

Editing Existing Blogs

To view detailed information about an existing blog, click the blog name in the search results pane. This will open a new *Blog Information window*, where the **Information** tab displays general information about the specific blog, for example the name of the blog and the presentation text.

Blog Information

Introduction

The Blog Information window allows you to view and change settings for a blog. The different settings are divided into several tabs.

Information Tab

The default tab the is opened when bringing up the window is the **Information** tab. In this tab you will find the most basic information about the blog - the name, presentation text and image of the blog. There is also a radio button for switching the blog between the active and not active state. This tab also contains the **Save** button which will apply any changes made in the **Blog Information** window.

Entries Tab

The Entries tab lists all entries that have been added to the blog from this tab you can add or remove entries. To get more information about a specific entry click the entry title in the list, this will bring up an *Edit Blog Entry window* with detailed information about the entry.

Create a new Entry

1. Click the **Create Entry** button, this will open a new **Create Blog Entry** window.
2. Enter title and text content for the new entry in the respective fields.
3. Click the **Create Entry** button.

Remove Entries

1. In the entries list, check the checkboxes next to the titles of the entries you wish to remove.
2. Click the **Remove Selected Entries** button.

Predefined Tags Tab

The interface on the **Predefined Tags** tab allows you to associate entities with different tags. You can use both predefined and free text tags. Predefined tags are defined in the *Predefined Tags* section.

Add a Tag

1. Either select a predefined tag from the **Predefined tags** list or manually enter a tag name in the **Tag** text box.
2. Click the **Add Tag** button.
3. Click the **Save Information** button on the **Information** tab.

Remove a Tag

1. Click the **Remove Tag** button next to the name of the tag you wish to remove.
2. Click the **Save Information** button on the **Information** tab.

Categories Tab

The **Categories** tab lists all the categories that have been defined in the *Categories* section in Moderation Mode. Categories that are currently associated with the entity have a checked checkbox next to their names.

Edit the Category Associations

1. Check the checkboxes next to the names of the categories you wish to associate with the blog.
2. Uncheck the checkboxes next to the names of the categories you no longer wish to associate with the blog.
3. Click the **Save Information** button on the **Information** tab.

Attributes Tab

The **Attributes** tab displays the attribute values, if any, for this entity. The number and type of attributes are different for different implementations of EPiServer Community - the **Attributes** tab in your solution may contain several or perhaps no attribute values. Attributes are defined from the Attributes section in Admin Mode.

Edit Blog Entry

Introduction

The Edit Blog Entry window contains information about a blog entry. The information is displayed on five different tabs - **Entry Details**, **Comments**, **Predefined Tags**, **Categories** and **Attributes**.

Entry Details Tab

The Entry Details tab allows you to view and change the title and the text content of the entry. This tab also contains the Save Changes button which is used to save any changes made in the window dialog.

Comments Tab

The **Comments** tab displays the comments, if any, that members have posted for the blog entry. This tab also allows you to remove specific comments.

Removing Entry Comments

1. In the comments list check the checkboxes next to the titles of the comments you want to remove
2. Click the **Remove Selected Comments** button.

Predefined Tags Tab

The interface on the **Predefined Tags** tab allows you to associate entities with different tags. You can use both predefined and free text tags. Predefined tags are defined in the *Predefined Tags* section.

Add a Tag

1. Either select a predefined tag from the **Predefined tags** list or manually enter a tag name in the **Tag** text box.

2. Click the **Add Tag** button.
3. Click the **Save Information** button on the **Information** tab.

Remove a Tag

1. Click the **Remove Tag** button next to the name of the tag you wish to remove.
2. Click the **Save Information** button on the **Information** tab.

Categories Tab

The **Categories** tab lists all the categories that have been defined in the *Categories* section in Moderation Mode. Categories that are currently associated with the entity have a checked checkbox next to their names.

Edit the Category Associations

1. Check the checkboxes next to the names of the categories you wish to associate with the blog.
2. Uncheck the checkboxes next to the names of the categories you no longer wish to associate with the blog.
3. Click the **Save Information** button on the **Information** tab.

Attributes Tab

The **Attributes** tab displays the attribute values, if any, for this entity. The number and type of attributes are different for different implementations of EPiServer Community - the **Attributes** tab in your solution may contain several or perhaps no attribute values. Attributes are defined from the Attributes section in Admin Mode.

Calendars

Introduction

The EPiServer Relate **Calendar** function provides all necessary functionality for creating calendar events, inviting users to the event, accepting invitations and keeping track of the number of attendees. The events can be either unique or recurring. Moderators can search for calendars and edit their events. The events display the basic event information as well as invitations and registrations.

Calendars are managed in the Community moderation mode, from the **Calendar** menu option.

Creating a Calendar

1. Click the **Create Calendar** button located in the top left corner of the **Calendar** section, this opens a new **Calendar Details** window.
2. Enter a name for the calendar in the **Name** field.
3. Click the **Save** button.

Once the calendar has been saved you can associate it with categories and add new events, please see...

Searching for Calendars

The search functionality for calendars differs from the search functionality in most other places in the Moderation Mode in that it will only return matches if the search term occurs at the beginning of the calendar name. Once you have found the calendar you are looking for you can edit the calendar's settings by clicking its name in the search results.

1. Enter the first few letters in the name of the calendar you wish to find.
2. Click the Search button, the search results are displayed below the search field.
3. Click the name of the calendar you wish to edit, this will open the Calendar Details window, read more about how to edit a calendar in..

Editing a Calendar

Click the name of a calendar in the search results to bring up the *Calendar Details* window for that event.

Calendar Details

Introduction

The **Calendar Details** window enables you to edit information about the calendar and calendar events. The window contains two tabs, the **Information** tab and the **Categories** tab.

Information Tab

The **Information** tab shows the layout of the calendar separated into months, you can use the left and right arrows at the top of the calendar view to navigate between the months. The Information tab also contains a **Name** field for changing the name of the calendar and a **Save** button for applying changes.

Add a new Calendar Event

1. Click **New Event** on the day the event is to take place. This opens the **Calendar Event Details** window.
2. Enter a name for the event and state a start and end date and time by clicking the calendar browse button.
3. Select the **Recurrence** check box if you want the event to recur daily, weekly, monthly or yearly. Set the recurrence range by clicking the **Start date** and **End date** browse buttons.
4. Select the maximum number of registrations allowed for the event in the Maximum registrations field.
5. If you check the **Hidden** check boxes the event will only be visible in for the creator and invited participants.
6. If you want the calendar event to include an image, browse for one by clicking **Browse** next to the **Event Image** field.
7. Click the **Save Event** button to create the event.

Edit a Calendar Event

Click the name of an event in the calendar to open the *Calendar Event Details* window.

Categories Tab

The **Categories** tab lists all the categories that have been defined in the **Categories** section in Moderation Mode. Categories that are currently associated with the calendar have a checked checkbox next to their names.

Edit the Category Associations of a Calendar

1. Check the checkboxes next to the names of the categories you wish to associate with the calendar.
2. Uncheck the checkboxes next to the names of the categories you no longer wish to associate with the calendar.
3. Click the **Save** button on the **Information** tab.

Calendar Event Details

Introduction

The Calendar Event Details allows you to edit the event settings and view the lists of invited and registered members.

Event Details Tab

This tab contains the description and scheduling settings for the event. To make any changes to the event, simply update the setting values and click the **Save Event** button. There is also a **Remove Event** button for removing the event from the calendar.

Invitations and Registrations Tabs

The Invitations tab lists the members that have been invited to participate in the event.

Registrations Tab

The Registrations tab contains a list of the members who have registered to participate in the event.

Clubs

Introduction

The **Clubs** function contains all the necessary functionality for moderators to handle clubs in a community. A community can contain an unlimited amount of clubs created both by moderators and/or by community members.

The **Clubs** section contains two tabs; **Search Clubs** where you can create, search for and edit clubs and **Approve Clubs** where you can set the approval state of clubs.

Search Clubs Tab

From the Search tab you can create new clubs as well as search for existing clubs.

Create a Club

1. Click the **Create Club** button, this opens the **Club Details** window.
2. Enter a name for the club in the **Name** field.
3. Enter a club owner name by clicking the ... button to search for a community user that should act as club owner. To select a user, start typing the alias of the user in the text box. After three characters have been entered, a search result is displayed. Click **Select** to select this user as club owner.
4. Enter a description for the club.
5. Choose if the club should be hidden or not for community users that are not members of the club by selecting **Hidden** or **Not hidden**.
6. Select the initial approval state of the club; **Approved**, **Pending** or **Deleted**.
7. Select whether the club should be open or closed for all users by selecting **Open** or **Closed**.
8. Enter a logotype for the club by browsing to the appropriate logotype to be used.
9. Click **Save Details** to save the club settings and create a new club.

Once the club has been created a new set of tabs become available, please see the Club Information topic for more information about the settings on the new tabs.

Search for Clubs

The search function allows you to search for clubs by name and/or description, you can also apply a number of filters to the search results. For example, you can search for clubs where the name contains "cars" and have at least 10 members. You can also list all existing clubs by leaving all of the search fields at their default values.

The values entered into the **Name** and **Description** fields do not have to appear in the beginning of the club's attribute value. For example, searching for name "board" will find clubs with the last "Skateboarding" and "Boardgames".

Click the name of a club in the search result to bring up the Club Information window where the full information for the club can be viewed and edited.

Removing clubs

It is important to differentiate between clubs that are in the Deleted state and clubs that have been permanently removed. Clubs in the Deleted state can still be moved to any of the other states but images that have been permanently removed are removed from the database. A club can be permanently removed regardless of its current state - the moderator doesn't have to set the club to the Deleted state first.

To set a club to the deleted state or permanently delete a club you must:

1. Perform a search to find the club you wish to set as deleted.
2. Check the checkbox(es) next to the club(s) you wish to m.
3. Check the **Remove permanently** checkbox to permanently remove the club(s), leave it unchecked to set the club(s) to the deleted state.
4. Click the **Remove Selected** button.

Approve a Club in the Deleted State

To set a deleted club back to the approved state you need to:

1. Search for the club you wish to modify. You can use the **Status** drop down list to only include clubs that are deleted.
2. Click the **Undo Remove** button

Approve Clubs Tab

The **Approve Clubs** tab contains the interface for moderators to review clubs. The **Approve Clubs** tab contains two sub tabs - **Not Approved**, and **Approved**, each of the sub tabs presents a filtered view of the clubs based on the their approval state.

Approval States

A club can be in one of three states:

- Not Approved - The club has been submitted by a member but has not yet been reviewed by a moderator.
- Approved - The club has been approved for use by a moderator.
- Deleted - The club has been set as deleted by a moderator. The club is still available in the system and can be moved to the approved state. Clubs in this state are not visible under the **Approve Clubs** tab, they must be searched for from the **Search Clubs** tab.

Approve Clubs

1. Click the **Not Approved** sub tab.
2. Check the check box(es) next to the club(s) you wish to approve. You can click the **Select/Clear All** button to select all clubs in the list, click it again to remove all selections.
3. Click the **Approve Selected Clubs** button.

Disapprove Clubs

1. Click the **Approved** sub tab.
2. Check the check box(es) next to the club(s) you wish to disapprove. You can click the **Select/Clear All** button to select all clubs in the list, click it again to remove all selections.
3. Click the **Disapprove Selected Clubs** button.

Club Information

Introduction

The Club Information window allows you to view and edit all information related to a club. The information is split into several sub tabs that can be scrolled through by hovering the mouse over the arrows in the top right corner of the dialog.

Club Details Tab

Any information concerning a club can be changed in the **Club Details** tab. Save any of the changed club details by clicking **Save Details**. Click Access Rights to change the access rights for the club, this will open the *Manage Access Rights* window.

Club Members Tab

The **Club Members** tab is where moderators change a member's status. Club members are also removed in this tab. Members can be set as not approved, approved or banned. Members requesting membership in a club that is Open will automatically be placed in the Approved state. Members that request member ship in a Closed club will be placed in the Not Approved state.

Change a Club Member's Status

The left section of the **Club Members** tab remains the same regardless of whether you are positioned in the **Not Approved**, **Approved** or **Banned** tabs.

1. To change the status of a member, select the appropriate option and click **Save Changes**. The member alias is then moved to the appropriate tab.
2. If you want to change the status for all the users in the tab, select the appropriate status under **Manage Status** on the left and click **Select All**.
3. To remove members from a club, select the members to remove and click **Remove Selected Members**. Only club owners have permission to change their status.

Club Image Gallery Tab

All images belonging to a club gallery are stored in the club image gallery. Moderators can see all images in the club's image gallery and approved, remove or hide them. If a club has structured their images in folders, the folders are displayed in sub-galleries. By default the club's logotypes are stored in a sub-gallery called Logotype.

Double-click an image to display detailed information about the image in a *Image Information* window. Here you can also see the original image size with information about the user that uploaded the image, the date the image was uploaded and a description text linked to the image.

Upload Images

Moderators can upload or download specific images to/from a specific club.

1. Click **Upload Image** and browse to the image that you want to upload.
2. Add a description for the image in the **Description** field if desired and click **Upload Image**. The image is then uploaded into the club image gallery.

Set Approval State of Images

Images in a club image gallery can be published, not published or deleted. Use the radio buttons below the image to select the image's new status, then click **Save Changes**.

It is also possible to approve all images with the same status by first selecting the **Published**, **Not Published** or **Deleted** radio button on the left. After that click **Select All** and then **Save Changes**. All the selected images are then marked as published, not published or deleted.

Remove Images

Images that are in the Deleted state are not actually removed from the upload folder, they can still be moved to any of the other approval states. To permanently remove image, check the checkboxes in the top left corner of the image thumbnails and click **Permanently remove selected images**. The images are then removed from the club image gallery.

Club Video Gallery Tab

The video gallery function stores and manages videos. Uploaded videos are automatically encoded into flash video, a widely spread Web-friendly format. Flash video provides fast, lightweight and platform-independent playback. The video gallery function generates image samples of every uploaded video and stores them in an image gallery bound to the video. The image samples provide a fast overview of the video, while saving performance and bandwidth.

The procedures for uploading, removing and setting approval state for videos are identical with the procedures for working with images.

Club News and Club Messages Tabs

The **Club News** and **Club Messages** tabs list the club's news and messages, both listings are actually blogs and use the same functionality as blogs in general. Moderators can create, administer and delete entries or comments on an entry. The moderator can also set basic news information.

The **Information** tab displays general information about the blog, for example the name of the blog and the presentation text. Moderators can change any of the information in the **Information** tab and save by clicking **Save Information**.

Edit Entries

The **Entries** tab displays a list of entries that have been created. The entry headline and text are displayed in the list with creation date and time. Edit an entry by clicking the entry headline in the **Entries** tab. This opens the *Edit Blog Entry* dialog, where you can change the title, text and other settings for the entry. Save the changes by clicking **Save Changes**.

Create a new entry by clicking **Create Entry**. Enter a title and text in the pop-up window and click **Create Entry**.

Remove entries by selecting the news entry to be removed and clicking **Remove Selected Entries**. The news entry is then removed from club news.

Club Forum Tab

Moderators can edit, remove and add new topics to a club's forum in the **Club Forum** tab. The upper section of the tab displays a list of topics that have been created, including information about when a topic was created, when the last reply was sent, how many replies have been sent, and the number of views for a specific topic.

Create a New Topic

1. Enter the subject or headline of the topic in the **Subject** field of the **New Topic** pane, and the topic content in the **Text** text box.
2. Select an appropriate radio button for the priority of the topic. **Normal** will put the topic in chronological order in the list of topics in the selected room. **Prioritized** will put the topic always on top of the list of topics in the selected room. **Announcement** will put the topic always on top of the lists in all rooms in the forum. The topic will be put above the prioritized topics.
3. Finally click **Create Topic** to create the topic.

Remove a Topic

Remove a topic by selecting the topic to be removed and Remove Selected Topics.

Edit Topic

Club forum moderators can edit and remove topic replies and move topics from one forum room to another. To see more details about the user who created a topic or a reply, click the user's name and all the user details will be displayed in the a pop-up.

1. Edit a topic in a room by clicking the subject text of the topic in the list of topics for that specific room, as in the first image below. From this window it is possible to edit a topic in a specific room and create replies.
2. Lock or unlock a topic by clicking **Lock/Unlock**. Locking a topic means that no more replies can be added to it.
3. Prioritize or unprioritize a topic by clicking **Prioritize/Unprioritize**. Prioritizing a topic means moving the topic to the top of the room topics or to have the topic in chronological order in the list of topics respectively.
4. Announce or unannounce a topic by clicking **Announce/Unannounce**. Announcing means selecting the topic to be on top of all listings of topics in all rooms in that forum.
5. Create a reply by entering text in the **Text** field and clicking **Create Reply**.
6. Edit a reply for a topic by clicking Edit Reply. Moderators can then edit the text of the reply.

Move a Topic

1. Move a topic by clicking **Move Topic**, which opens the **Move Topic** window.
2. If Trace Move is set to "Yes" in the room, a subject and text is required that will be used for the topic subject and text in the original room. If "Trace Move" is set to "No" in the room, the topic is moved to the other room without leaving the topic in the original room.

Club Poll Tab

The **Club Poll** tab is where a moderator manages polls specific to a club. The polls available for a club are listed as shown below. Edit a poll by clicking the poll name in the **Filtered Polls** section of the tab. Remove a poll by selecting the check box(es) for the poll(s) that you want to remove and clicking **Remove Selected Polls**.

Create a Poll

1. Create a new poll for the club by clicking **Create Poll**. This opens a new window where you enter information about the poll.
2. Enter a name for the poll in the **Name** field and select a date and end date for the poll.
3. Add the available options that can be voted by clicking **Add Choice** and entering the option in the **Text** field.
4. Remove an option by clicking **Remove** next to the option to be removed.

Club Document Archive Tab

The documents and the files that are uploaded on a club's document archive are stored under the **Club Document Archive** tab as shown below.

Moderators can see a list of files and documents that have been uploaded to the club document archive. The list also displays who uploaded the document or file, the size of the document, and the date when it was uploaded. If a club has chosen to have their documents and files structured in folders, the folders are displayed in sub-archives.

Upload/Download Documents

Moderators can upload or download specific documents or files to/from a specific club.

1. Click **Upload Document** and browse to the document that you want to upload.
2. Add a description for the document in the **Description** field if desired and click **Upload Document**. The document is then uploaded into the club's document archive.
3. Download a document or a file by clicking the file name in the **Name** column in the list of documents for the club.

Remove Documents

Remove a document/file from the document archive by selecting the document to be removed and clicking **Remove Selected Documents**. The document is then removed from the club document archive.

Club Calendar Tab

When a club is created a calendar is automatically created and associated with the club. The **Club Calendar** tab enables you to add new events to the club calendar, the functionality is identical to the *Calendar Details* window.

Predefined Tags Tab

The interface on the **Predefined Tags** tab allows you to associate entities with different tags. You can use both predefined and free text tags. Predefined tags are defined in the *Predefined Tags* section.

Add a Tag

1. Either select a predefined tag from the **Predefined tags** list or manually enter a tag name in the **Tag** text box.
2. Click the **Add Tag** button.
3. Click the **Save Information** button on the **Information** tab.

Remove a Tag

1. Click the **Remove Tag** button next to the name of the tag you wish to remove.
2. Click the **Save Information** button on the **Information** tab.

Categories Tab

The **Categories** tab lists all the categories that have been defined in the *Categories* section in Moderation Mode. Categories that are currently associated with the entity have a checked checkbox next to their names.

Edit the Category Associations

1. Check the checkboxes next to the names of the categories you wish to associate with the blog.
2. Uncheck the checkboxes next to the names of the categories you no longer wish to associate with the blog.
3. Click the **Save Information** button on the **Information** tab.

Attributes Tab

The **Attributes** tab displays the attribute values, if any, for this entity. The number and type of attributes are different for different implementations of EPiServer Community - the **Attributes** tab in your solution may contain several or perhaps no attribute values. Attributes are defined from the Attributes section in Admin Mode.

Manage Access Rights

Introduction

The Manage Access rights window allows you to set the access rights for existing clubs and to assign specific users or user groups the access rights to moderate a club. The following access rights can be applied for a specific user or group:

- Read
- Edit
- Remove
- Administer
- Rate
- Categorize
- Tag

Assign Access Rights

1. Search for the users/groups to which you want to assign access rights by entering information in the **Search for** field and clicking **Search**.
2. From the search results list, click **Add User/Add Group** next to the user/group to receive the access rights. The user/group is added to the lower section of the window where you assign the access rights that the user should have by selecting the appropriate check boxes. Click **Save Access Rights** at the top of the window to save the access rights for the user/group.

Remove Access Rights

Uncheck the check boxes corresponding to the access rights the user/group no longer should have. You can remove all access rights for a user/group by clicking the **RemoveUser/Remove Group** buttons. When you are done click the **Save Access Rights** button.

Experts**Introduction**

The EPiServer Relate **Expert** function lets community members ask questions within a specific or general categories, receiving an answer from an expert. The expert can be an external expert or a community member. An external expert gains access to the site by a unique expert ID, which can be provided as a part of a link in an e-mail with the question. Experts can be assigned to a specific site or they can answer questions from any site within the community. Site administrators can review questions and answers before they are published, and the users can rate the answers.

The **Experts** section contains two tabs; the **Experts** tab for managing experts and the **Questions** tab for managing the questions that have been assigned to the experts.

Experts Tab

The **Experts** tab contains three sub tabs; one each for applied, active and inactive experts. Click an expert name to display detailed information about the expert, this opens the *Expert Information* window.

Create an Expert

1. To create an expert click **Create Expert** from one of the sub tabs in the **Experts** tab. The **Expert Information** window contains two tabs; Expert Details and Assigned Questions.
2. Enter the appropriate information about the expert in the **Expert Details** tab and click **Save Details**.

Activation States

An expert can be in one of three activation states: **Applied**, **Active** or **Inactive**.

- Applied - Members who have applied to become experts but have not yet been approved by a moderator.
- Active - Experts who have been approved by a moderator and can be assigned questions.
- Inactive - Experts who cannot be assigned questions.

Modify the Activation State of Experts

1. Click the tab corresponding with the current approval state of the expert.
2. Select the check box next to the expert(s) to be modified. You can Click **Select/Clear All** to select or clear all the check boxes in the tab.
3. Click the **Approve/Activate/Deactivate Selected Experts** button.

Remove Experts

Experts can be removed from any of the three tabs. Remove an expert by selecting the check box next to the expert(s) to be removed and clicking **Remove Selected Experts**. The selected experts are removed.

Questions Tab

The **Questions** tab contains three sub tabs where you can review, publish and reject expert questions in the **New**, **Assigned** and **Approved** sub tabs. You can click the header of any question to see more details about the question. This will bring up the *Question Information* window.

Reject a Question

1. Select the **New** tab.
2. Select the check box next to the question(s) to be rejected, you can use the **Select/Clear All** to select or clear all the check boxes in the tab.
3. Click **Reject Selected Questions**.

Assign a Question to an Expert

The **Assigned Experts** tab is where you assign and remove experts to the question.

1. Select an expert from the expert drop-down list and click **Assign**.
2. To remove an assigned question from an expert select the check box next to the expert name and click **Remove Assignment**.

Publish a Question

1. Select the **Assigned** tab.
2. Select the check box next to the question(s) to be published and click **Publish Selected Questions**.
3. Click **Select/Clear All** to select or clear all the check boxes in the tab.

Remove an Assigned Question

1. Select the **Assigned** or **Published** tab.
2. Select the check box next to the question(s) to be removed and click **Remove Selected Questions**.
3. Click **Select/Clear All** to select or clear all the check boxes in the tab.

Change a Question

1. Click a question header to open a pop-up window that contains the tabs Question Details, Assigned Experts, Related Questions, Tags, Categories, and Attributes.
2. The **Question Details** tab is where you can view, change and remove a question. Remove a question by clicking **Remove Question**. Save any changes that you've made to the question by clicking **Save Details**.

Add a Related Question

The **Related Questions** tab lists all related and unrelated questions is where questions are added and removed as related questions.

1. To add a question as related, click **Add** next to question you wish to add as related.
2. To remove a question as related, click **Remove** next to the question you wish to remove as related.

Expert Information

Introduction

The Expert Information window contains all information about an expert, this includes basic information like name and description but also information about questions assigned to the expert. The Expert Information window contains several tabs:

Expert Details Tab

Contains the basic information about the expert, such as name and contact information. You can modify any of the settings and save the changes by clicking the **Save Details** button.

Assigned Questions Tab

Lists all the questions currently assigned to the expert. You can also add answers to questions and remove assignments from this tab.

Expert Blog Tab

When an expert is created a blog for the expert is automatically created as well. The Expert Blog tab allows you to create, edit and remove entries from the blog. The functionality is identical to the *Blog Information* UI.

Predefined Tags Tab

The interface on the **Predefined Tags** tab allows you to associate entities with different tags. You can use both predefined and free text tags. Predefined tags are defined in the *Predefined Tags* section.

Add a Tag

1. Either select a predefined tag from the **Predefined tags** list or manually enter a tag name in the **Tag** text box.
2. Click the **Add Tag** button.
3. Click the **Save Information** button on the **Information** tab.

Remove a Tag

1. Click the **Remove Tag** button next to the name of the tag you wish to remove.
2. Click the **Save Information** button on the **Information** tab.

Categories Tab

The **Categories** tab lists all the categories that have been defined in the *Categories* section in Moderation Mode. Categories that are currently associated with the entity have a checked checkbox next to their names.

Edit the Category Associations

1. Check the checkboxes next to the names of the categories you wish to associate with the blog.
2. Uncheck the checkboxes next to the names of the categories you no longer wish to associate with the blog.
3. Click the **Save Information** button on the **Information** tab.

Attributes Tab

The **Attributes** tab displays the attribute values, if any, for this entity. The number and type of attributes are different for different implementations of EPiServer Community - the **Attributes** tab in your solution may contain several or perhaps no attribute values. Attributes are defined from the Attributes section in Admin Mode.

Question Information**Introduction**

The **Question Information** window allows you to view and edit all the information for a question. The window contains several tabs:

Question Details Tab

The Question Details tab shows information about who posed the question, the current state of the question and the question's header and text content. The header and content texts can be changed from here by updating the fields and clicking the **Save Details** button. You can also reject the question by clicking the **Reject Question** button.

Assigned Experts Tab

The Assigned Experts tab list the expert(s), if any, the question has been assigned to. You can also add or remove assignments from this tab.

Related Questions Tab

The Related Questions tab allows you to create connections between questions. The top part of the tab lists questions that currently are related, click the **Remove** button to remove the relation. The bottom part of the tab lists questions that currently are not related, click the **Add** button to add relation to a question.

Predefined Tags Tab

The interface on the **Predefined Tags** tab allows you to associate entities with different tags. You can use both predefined and free text tags. Predefined tags are defined in the *Predefined Tags* section.

Add a Tag

1. Either select a predefined tag from the **Predefined tags** list or manually enter a tag name in the **Tag** text box.
2. Click the **Add Tag** button.
3. Click the **Save Information** button on the **Information** tab.

Remove a Tag

1. Click the **Remove Tag** button next to the name of the tag you wish to remove.
2. Click the **Save Information** button on the **Information** tab.

Categories Tab

The **Categories** tab lists all the categories that have been defined in the *Categories* section in Moderation Mode. Categories that are currently are associated with the entity have a checked checkbox next to their names.

Edit the Category Associations

1. Check the checkboxes next to the names of the categories you wish to associate with the blog.
2. Uncheck the checkboxes next to the names of the categories you no longer wish to associate with the blog.
3. Click the **Save Information** button on the **Information** tab.

Attributes Tab

The **Attributes** tab displays the attribute values, if any, for this entity. The number and type of attributes are different for different implementations of EPiServer Community - the **Attributes** tab in your solution may contain several or perhaps no attribute values. Attributes are defined from the Attributes section in Admin Mode.

Forums

Introduction

The Forums section allows moderators can view, search and manage all forums, rooms, topics and replies within the community. Moderators can create new forums with a special design and structure for each room in that forum. The structure of forums and rooms is displayed in the Forum Tree below. In general it can be said that forums are the highest level and they contains rooms. Rooms are the second level and they contain topics.

It is also possible to administer forums that are linked to specific clubs. These club forums are listed in the Forum Tree structure under Club Forum. To see the rooms for the clubs, open the Club Forum folder in the forum tree.

Working With Forums

Create a New Forum

Click the **Create Forum** button, fill in a name for the forum and click the **Save Forum** button. The new forum will not be visible in the forum tree until you click **Refresh Tree**.

Remove a Forum

Select the forum to be removed in the forum tree and click **Remove Forum** in the right pane.

Rename a Forum

Select the forum to be renamed and edit the name of the forum in the **Name** field. Click **Save Forum**.

Manage Forum Access Rights

Select the forum for which you want to set the access rights and click **Access Rights** from the right pane, this opens the *Manage Access Rights* window. Please see that topic for more information on how to assign access rights.

Working With Rooms

In order to be able to create a new room you must first select where in the forum tree you want the new room to be placed. In the case of the forum tree shown to the right, this would be by selecting the **Club Forum** or **General Forum** folders. Note that all changes to rooms will not be visible in the forum tree until you have clicked **Refresh Tree**.

Create a Room

1. When you have selected where in the forum tree that you want the room to be placed, click **New Room** at the top of the window.
2. In the **Room Details** tab in the **New Room** pane, enter the name and description of the room.
3. When you create a room it is also possible to define the design according a stylesheet and set the structure of the specific room to be threaded or flat. You can also set whether you want to trace the move of topics or comments/answers and whether they should be concealed.
4. When you have entered all the information for your room, click **Save Room**.

Edit Room Details

Select the room for which you want to edit the details from the forum tree. Change the appropriate information in the **Edit Room** tab and click **Save Room**.

Remove a Room

Select the room to be removed in the forum tree and click **Remove Room** in the **Edit Room** pane.

Moderate Room Topics

Select a room in the forum tree and click the Moderate Room button. This opens the *Moderate Room* window where you can add, delete and edit topics.

Access Rights

It is possible to set the access rights for forums and rooms. It is possible to give a specific user or user group the access rights to, among other things, read rooms, create, edit and remove topics, reply, prioritize, and announce.

Select the forum or room for which you want to set the access rights and click **Access Rights** from the right pane, this opens the *Manage Access Rights* window. Please see that topic for more information on how to assign access rights.

Moderate Rooms

Introduction

Moderators can view and edit all rooms in the forum tree. The **Moderate Room** window displays topics in the room with information about the user that created the topic, when the last reply was sent, how many replies have been sent, the number of views of this specific topic, and the date when the topic was created.

Working With Topics

Create a New Topic

1. Enter the subject or headline of the topic in the **Subject** field of the **New Topic** pane, and the topic content in the **Text** text box.
2. Select an appropriate option for the priority of the topic. **Normal** will put the topic in chronological order in the list of topics in the selected room. **Prioritized** will put the topic always on top of the list of topics in the selected room. **Announcement** will put the topic always on top of the lists in all rooms in the forum. The topic will be put above the prioritized topics.
3. Finally click Create Topic to create the topic.

Remove a Topic

Remove a topic by selecting the topic(s) to be removed and clicking **Remove Selected Topics**.

Edit Topic

Room moderators can edit and remove topic replies and move topics from one room to another. To see more details about the user that created a topic or a reply, click the user's name and all the user details will be displayed in a pop-up.

1. Edit a topic in a room by clicking the subject text of the topic in the list of topics for that specific room. From this window it is possible to edit a topic in a specific room and create replies.
2. Lock or unlock a topic by clicking **Lock/Unlock**. Locking a topic means that no more replies can be added to it.
3. Prioritize or unprioritize a topic by clicking **Prioritize/Unprioritize**. Prioritizing a topic means moving the topic to the top of the room topics or to have the topic in chronological order in the list of topics respectively.
4. Announce or unannounce a topic by clicking **Announce/Unannounce**. Announcing means selecting the topic to be on top of all listings of topics in all rooms in that forum.
5. Edit a reply for a topic by clicking **Edit Reply**. Moderators can then edit the text of the reply.

Move a Topic

1. Move a topic by clicking **Move Topic** from the **Moderate Room** window. This opens the **Move Topic** window.
2. If Trace Move is set to **Yes** in the room, a subject and text is required that will be used for the topic subject and text in the original room. If **Trace Move** is set to **No** in the room, the topic is moved to the other room without leaving the topic in the original room.

Manage Access Rights**Introduction**

The Manage Access rights window allows you to set the access rights for existing clubs and to assign specific users or user groups the access rights to moderate a club. The following access rights can be applied for a specific user or group:

- Read
- Edit
- Remove
- Administer
- Rate
- Categorize
- Tag

Assign Access Rights

1. Search for the users/groups to which you want to assign access rights by entering information in the **Search for** field and clicking **Search**.
2. From the search results list, click **Add User/Add Group** next to the user/group to receive the access rights. The user/group is added to the lower section of the window where you assign the access rights that the user should have by selecting the appropriate check boxes. Click **Save Access Rights** at the top of the window to save the access rights for the user/group.

Remove Access Rights

Uncheck the check boxes corresponding to the access rights the user/group no longer should have. You can remove all access rights for a user/group by clicking the **RemoveUser/Remove Group** buttons. When you are done click the **Save Access Rights** button.

Polls**Introduction**

Polls is a useful way of enhancing community interactivity and creating dynamic sites. The EPiServer Relate **Poll** function consists of a powerful poll administration tool, with a web user interface, that is used by administrators to manage polls. Moderators start and administer polls that community members can participate in.

Search for Polls

The search interface allows you to search for existing polls by using keywords and use filters to narrow down the search results. The values you enter into The **Poll text** and **Author** fields do not have to occur at the start of the poll's attribute value. For instance searching for the poll text "are" will match polls with the texts "**Are** you happy?" and "Do you want universal healthcare?".

The **Active date** filter will only include polls that have an activation span that overlaps the selected span, i.e. the poll must be active on at least one of the days in the selected span.

Create a Poll

1. Create a new poll by clicking **Create Poll**.
2. Enter a name for the poll in the **Name** field and select a start and end date for the poll by selecting a date and time in the calendars.
3. Add a choice for the poll by clicking **Add Choice**. Enter a text for the first poll choice in the **Text** field in the **Poll Choices** group box. Click **Add Choice** again for the second choice and continue in this way until you have created all the choices you wish to be available in the poll.
4. Move the order of the available choices in the list by clicking the arrows under **Display Order**.
5. Save the poll by clicking **Save Poll** at the top of the pop-up window.

Remove a Poll

1. Execute a search to find the poll(s) you want to remove.
2. In the search result list, check the checkbox(es) next to the poll(s) you want to remove.
3. Click the **Remove Selected Polls** button.

Votes

If a poll choice has member votes connected to it, the moderator can click on the choice vote count link and open up and see who voted. The poll vote's page displays member votes for the specified choice.

Poll Information

Introduction

The Poll Information window allows moderators to view and edit the settings for a poll. There are two tabs available in this window.

Poll Details Tab

This tab shows all the settings and possible answer alternatives for the poll. Moderators can edit all settings, changes are saved by clicking the **Save Poll** button.

Categories Tab

The **Categories** tab lists all the categories that have been defined in the *Categories* section in Moderation Mode. Categories that are currently associated with the entity have a checked checkbox next to their names.

Edit the Category Associations

1. Check the checkboxes next to the names of the categories you wish to associate with the blog.
2. Uncheck the checkboxes next to the names of the categories you no longer wish to associate with the blog.
3. Click the **Save Information** button on the **Information** tab.

Outreach

This section describes the functionality under the **Outreach** section of the EPiServer Relate Community Moderation interface.

Campaigns

Introduction

Campaigns, also known as viral marketing, are a way for communities to attract more members. The EPiServer Relate **Campaign** function provides a tool for creating campaigns and referrals in a community. The Campaign function keeps track of invitations and invitations that have led to an actual membership. Moderators can easily create, modify and remove campaigns.

Working with Campaigns

Create a Campaign

To create a new campaign, click the **Create Campaign** button. A pop-up window shows the campaign details (see below). Add the necessary information and click "Save campaign".

Change an Existing Campaign

To make changes to a campaign, click the campaign name in the listing. If there are referrals connected to this campaign, the **Download Referrals** button appears at the top menu. To download the referrals, click the button followed by **Save**. An Excel file is created that contains all the referrals for this campaign.

Campaign Information

Information Tab

From this tab you can change all the settings for a campaign. Simply update the values for the settings you want to change and click the **Save Campaign** button. If there are referrals connected to this campaign, the **Download Referrals** button appears at the top menu. To download the referrals, click the button followed by **Save**. An Excel file is created that contains all the referrals for this campaign.

Categories Tab

The **Categories** tab lists all the categories that have been defined in the *Categories* section in Moderation Mode. Categories that are currently associated with the entity have a checked checkbox next to their names.

Edit the Category Associations

1. Check the checkboxes next to the names of the categories you wish to associate with the blog.
2. Uncheck the checkboxes next to the names of the categories you no longer wish to associate with the blog.
3. Click the **Save Information** button on the **Information** tab.

Contests

Introduction

Contests are popular in communities, providing a method to activate community members and create a more dynamic and interactive community. The EPiServer Relate **Contest** function contains all functionality necessary to start and administer contests in a community and can handle questions with single and multiple alternatives as well as plain text answers.

Create a Contest

1. Create a contest by clicking **Create Contest** after selecting the **Contest** menu option. This will open the **Contest Information** window.

2. Enter a name for the contest in the **Name** field and select on which Web site the contest is to apply with the **Web site** drop-down list.
3. Select a start and end date for the contest and browse to an appropriate image if you would like an image to be associated with the contest. Click **Save** to save the contest. The contest is saved and two new tabs are displayed: **Contest Questions** and **Contest Submissions**. Read further information about these tabs below.

Remove a Contest

All contests are listed when you open the Contest menu option. Remove a contest by clicking **Remove** next to the contest to be removed.

Create Contest Questions

To create questions for a contest click the name of the contest in the listing to open the *Contest Information* window.

Contest Information

Introduction

The Contest Information allows you to edit the settings and the questions for the contest. This window also lists the contest submissions.

Contest Details Tab

The **Contest Details** tab show settings like name and start/end dates for the competition. Any of the settings can be edited by a moderator. The settings are saved by clicking the **Save** button.

Contest Questions Tab

Questions that belong to a contest are created in the **Contest Questions** tab. There are three different types of questions: text, single alternative and multiple alternatives.

- Text - A text question is a question that allows for a free-text answer. There is no correct answer for this type of question.
- Single Alternative - a multiple alternative question where only one of the alternatives is the correct answer.
- Multiple Alternative - a multiple alternative question where the correct answer is a combination of two or more choices.

Create a Question

Click the appropriate label: Text, Single Alternative or Multiple Alternative.

- Enter your question in the **Text** field and an appropriate image if desired. Click **Save Question** to save the question.
- Enter your question in the **Text** field and add the available alternatives in the **Alternative** fields. Select the correct answer by selecting the **Is Correct** option next to the correct option. Save the question by clicking **Save Question**.
- Enter your question in the **Text** field and add the available alternatives in the **Alternative** fields. Select the correct answers by selecting the **Is Correct** option next to the correct options. Save the question by clicking **Save Question**.

Contest Submissions Tab

The **Contest Submissions** tab displays the community members set of answers in the contest. Moderators can easily view the number of correct answers each member has, pick winners and download the list in Microsoft Excel. The answer list displays each user's answers and the corresponding questions.

Categories Tab

The **Categories** tab lists all the categories that have been defined in the *Categories* section in Moderation Mode. Categories that are currently associated with the entity have a checked checkbox next to their names.

Edit the Category Associations

1. Check the checkboxes next to the names of the categories you wish to associate with the blog.
2. Uncheck the checkboxes next to the names of the categories you no longer wish to associate with the blog.
3. Click the **Save Information** button on the **Information** tab.

Meta Data (Moderation)

This section describes the functionality under the **Meta Data** section of the EPiServer Relate Community Moderation interface.

Categories

Introduction

Once a category is created in moderation mode, it is available for use on the **Categories** tab located in the information windows for entities. Refer to the *Categories* section to find out more about categories in EPiServer Relate.

Create a Category

1. Create a new category by first selecting where in the category tree the new category should be placed.
2. Select a category from the category tree and click **Create Category**.
3. Enter a name for the category and click **Save Details**.

Remove a Category

In the category tree click the category you wish to remove, then click the **Remove Category** button on the right pane.

Predefined Tags

Introduction

The **Predefined Tags** section allows moderators to define sets of predefined tags for different entity types. Refer to the *Tags* section to find out more about tags in EPiServer Relate

Create a Predefined Tag

1. Click the **Create Tag** button.
2. Select the entity type for which this tag should be available.
3. Enter the desired name in the **Name** field and click the **Save Predefinition** button.

List and Remove Predefined Tags

Simply select an entity type in the drop down list to show the predefined tags for that type. To remove a predefined tag, click the **Remove Predefinition** button next to the tag name.

Community Administration

This section describes the community **administration features** in EPiServer Relate. Community administration involves mainly the work of managing users and access rights as well as defining attributes and other system administrative tasks.

Meta Data (Administration)

This section describes the functionality under the **Meta Data** section of the EPiServer Relate Community Administration interface.

Attributes

Introduction

Custom attributes can be added through code or using the community Admin interface, which is described in the following.

List Existing Attributes

Select an entity type in the list to display the attributes currently assigned to that type. You can click the name of the attribute to view or edit it

Create an Attribute

1. Click the **Create Attribute** button
2. Enter the name of the attribute in the **Attribute name** field. This is the identifier that will be used in the code to access the attribute.
3. Select the entity type for which the attribute should be added in the **For type** list.
4. Select the type of attribute to be added in the **Of type** list
5. Check the **Hide attribute** checkbox to hide the attribute from moderation mode. Hidden attributes can only be manipulated via code.
6. Certain attribute types allow you to specify a set of allowed values, click **Add Choice** to add new choices.
7. Click **Save Information**.

Remove an Attribute

Click the **Remove Attribute** button next to the attribute in the list to remove it.

Modules

This section describes the functionality under the **Modules** section of the EPiServer Relate Community Administration interface.

Webmail

Introduction

The EPiServer Relate **Webmail** function enables site members to send and receive e-mails on the website. The webmail administration lets moderators create e-mail signatures. Moderators can also create, disable and remove accounts for a specific user in the users *My Page* window.

Add a Signature

1. Select the **Signature** tab from the **Webmail** section.
2. Add the signature in the **Text** or **HTML** text fields and click **Save**. The signature will appear at the bottom of each e-mail.
3. To delete a signature, remove the text from the appropriate field and click **Save**.

Add a Domain

1. Select the **Domains** tab from the **Webmail** section and click **Add Domain**.
2. Enter a domain name and select a mail server and click **Save**.

Add a Mail Server

1. Select the **Mail Server** tab from the **Webmail** section and click **Add Mail Server**.
2. Enter the properties in the pop-up window and click **Save**.

Access Rights

Access rights in EPiServer Relate can be set on all content in the community, both editorial content and community generated content. The search in EPiServer Relate considers the access rights to make sure each member only gets to see the information he/she is allowed to. As a community administrator, you can also give community members moderation access rights for instance to moderate a forum. Community access right management is done from the community administration interface.

Administrative Access Rights

Introduction

The **Administrative Access Rights** section is used to define which users and groups should have access to **Moderation Mode** and **Admin Mode**. The top of the view displays the groups and users who currently have access, below this is the search interface for finding users and groups.

Edit Access Rights

Check or uncheck the appropriate checkboxes in the top view and then click the **Save** button.

Add and Remove Users and Groups

1. Search for the user/group to add by entering a text in the **Search for** field and clicking **Search**.
2. Click **Add**. Select the **Access** check box and then **Save**.

To remove a user or group, click **Remove** in the **Members** pane and then **Save**.

Module Access Rights

Introduction

The **Module Access Rights** section is used to define which users and groups should have access to the different modules. At the top of the view are the controls for selecting modules. Below that is a view that displays current access rights for the selected module. At the bottom of the view is the search interface for finding users and groups.

Edit Access Rights

1. Select the module you wish to administer in the module list and click the **Select** button.
2. Check or uncheck the appropriate checkboxes in the **Members** pane and then.

3. Click the **Save** button.

Add and Remove Users and Groups

1. Select the module you wish to administer in the module list and click the **Select** button.
2. Search for the user/group to add by entering a text in the **Search for** field and clicking **Search**.
3. Click **Add**. Select the **Access** check box and then **Save**.

To remove a user or group, click **Remove** in the **Members** pane and then **Save**.

Search User/Group

Introduction

The Search User/Group section allows you to edit and remove users and groups.

Search for Users or Groups

Enter a search term in the **Search for** field, choose if you want to search for users, groups or both and click the **Search** button. The results of the search are listed below.

Edit a User or Group

After performing a search, click the name of the user or group in the search results to edit the item. The functionality for editing users and groups is identical to the *Create User* and *Create Group* sections respectively.

Create User

Introduction

The **Create User** section is where you create users and assign group membership. To create a user you need to fill out the **User Settings** form, assign group membership to the user as described below, and click the **Save** button.

Assign Group Membership

At the bottom of the section are the control for adding the user to groups. The **Available Groups** area on the left allows you to search for groups or list all groups. The **Selected Groups** area on the right display the groups that the user is currently member of.

Add the User to Groups

1. In the **Available Groups** view - enter the start of the name of the group you wish to find in the search field and click **Search**. You can also click the **Show all** button to list all available groups.
2. Click the name of the group in the list to select it, you can select multiple groups by shift- or control-clicking them.
3. Click the >button to add the user to the selected group(s).

Remove the User from Groups

1. In the **Selected Group** view - click the name of the group you wish to remove.
2. Click the **X** button to remove the user from the selected group(s).

Create Group

Introduction

The **Create Group** section is where you create groups and define their place in the group hierarchy. To create a group you need to name the group, assign child groups as described below, and click the **Save**

button.

Assign Child Groups

At the bottom of the section are the control for defining child groups. The **Available Groups** area on the left allows you to search for groups or list all groups. The **Selected Child Groups** area on the right display the groups currently are children of the group.

Add Child Groups

1. In the **Available Groups** view - enter the start of the name of the group you wish to find in the search field and click **Search**. You can also click the **Show all** button to list all available groups.
2. Click the name of the group in the list to select it, you can select multiple groups by shift- or control-clicking them.
3. Click the >button to assign the selected group(s) as child groups.

Remove the User from Groups

1. In the **Selected Group** view - click the name of the group you wish to remove.
2. Click the **X** button to remove the selected group(s) as child groups.

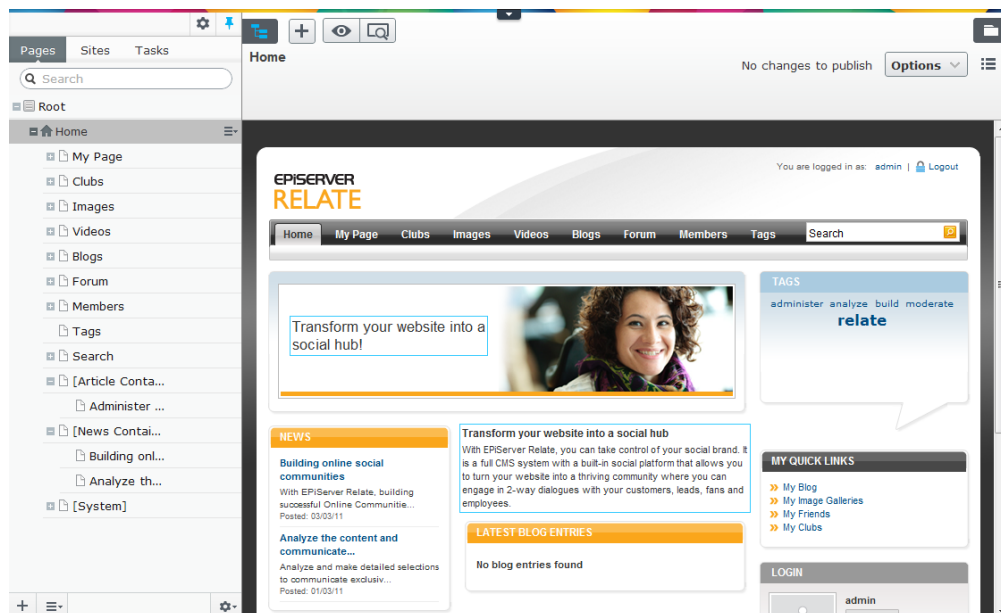
Sample Site

The **EPiServer Relate sample site** provides a set of demo templates to illustrate the functionality included. The sample template package is intended as inspiration when you build your own community site based on EPiServer Relate. In the following the templates included in the package are described in more detail.

Start Page

Introduction

When accessing the Edit view, you will see the EPiServer CMS editor interface and the page tree structure for the website. In EPiServer Relate, you will find a "Community" option in the top menu of the website. This is where the community moderator and administrator will access the Community functions. Content pages are accessed as usual from the EPiServer CMS edit mode.



In this example, the various community parts such as Clubs, Forums and Blogs, are all EPiServer CMS pages. However, personal content that members add to the community will be stored as Community content, and not as EPiServer CMS pages. This means that if you want to maintain editorial content such as introduction text for instance on the "Forums" main page, this is done from the EPiServer CMS edit mode. If you want to moderate individual forum postings, this is done from the Community administration interface.

Most CMS page types in these examples have very few editor fields. Typically there is a main body editor area where you can enter an introduction text. There may also be content blocks which can be added to content areas. The rest of what is displayed on the page is built into the functionality of the page template. In the following each page type included in the template package is described in more detail.

The example pages are based on standard EPiServer CMS page types. Note that only community related features will be described here. Refer to the EPiServer CMS user documentation for more information about basic EPiServer CMS functions.

Configuring and Editing the Start Page

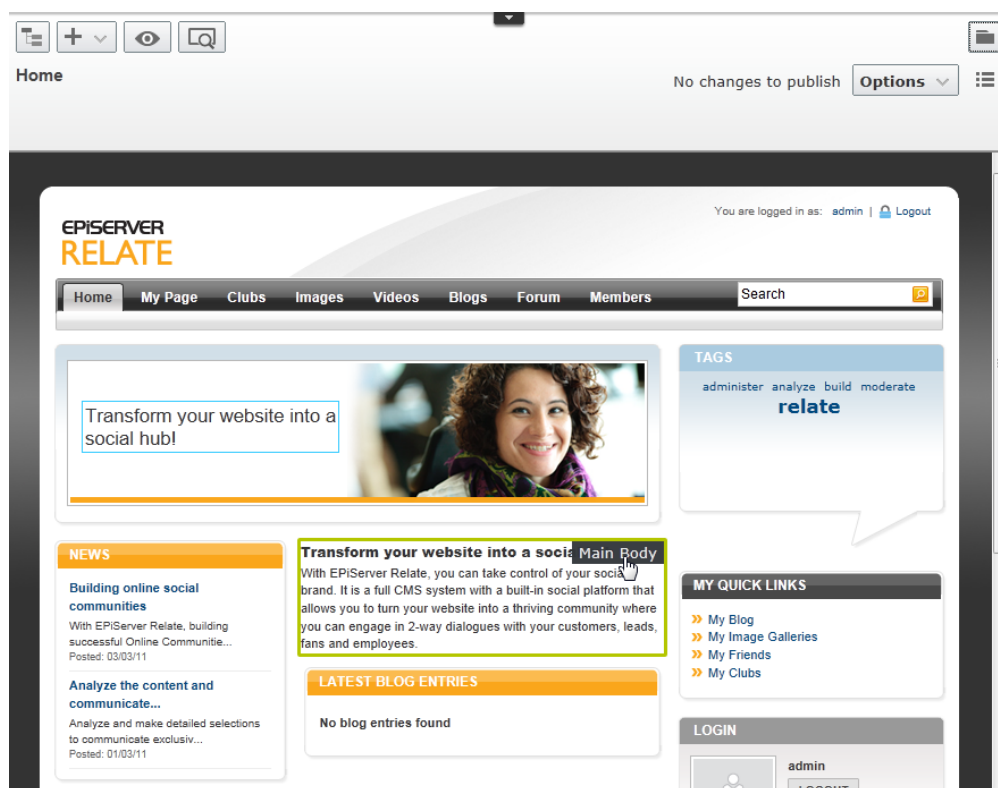
The start page in this example is the entrance to the EPiServer Relate sample site. From here, website visitors and community members can log on to the site to access community content.

The start page is built using an EPiServer CMS page type named **Start**. Most often the start page will already be set up and configured, and will not be updated very often. If needed, the editor can make changes to the introduction text and start page configuration.

This example start page has an editorial area for entering introduction text which will be displayed in the middle of the page. On the top of the page there is an image banner area where the editor can link an image of choice into the web page.

The rest of the start page is filled with sections for displaying community content blocks such as latest news, articles, image galleries, blog entries and tags. The right-column contains a login section. The display of the various sections is built into the page template functionality, and the sections are pointed out in the configuration of the start page. When hovering over an area you can see whether it can be updated from the Edit view.

The text in the middle section of the start page is entered in the **Main Body** editor. This can be updated directly from **On-Page Editing**, or from the **Forms Editing** mode.



The **configurations settings** for the start page can only be managed from the **Forms Editing** mode under **Content**. The banner image is selected in the field **Intro Image URL**. An alternative text for the banner image can be entered in the field **Intro Image Alt Text**. The Intro text field is optional and is used for entering a title which will be displayed on top of the start page banner image.

Home No changes to publish **Options**

Name: Visible to: Everyone [Manage](#)

Name in URL: Languages: en [Manage](#)

Simple address: ID, Type: 4, Start

Display in navigation: ☒ Tools

Content Settings

Category:

Main Body: **Transform your website into a social hub**
 With EPiServer Relate, you can take control of your social brand. It is a full CMS system with a built-in social platform that allows you to turn your website into a thriving community where you can engage in 2-way dialogues with your customers, leads, fans and employees.

Path:

Intro Image Url:

Intro Image Alt Text:

Intro text:

My Images Page:

View Image Page:

My Image gallery Page:

My Blog Page:

The lower part of the configuration section contains specific site settings that are set on the start page. Here the various community sections are configured by selecting the corresponding community main pages in the tree structure in Edit view.

Content	Settings
Video Player Page	Video Player 21 ✕ ...
My Settings Page	My Settings 6 ✕ ...
My Page	My Page 5 ✕ ...
My Friends Page	My Friends 28 ✕ ...
Topic Page	Topic 26 ✕ ...
Privacy Page	Privacy 43 ✕ ...
News Page	[News Container] 34 ✕ ...
Video Gallery Page	Videos 20 ✕ ...
Tags Page	Tags 29 ✕ ...
Image Galleries Page	Images 16 ✕ ...
Club Page	Clubs 7 ✕ ...
Club Event Page	Events 14 ✕ ...
Club Members Page	Members 13 ✕ ...
Club Forum Page	Forum 12 ✕ ...
Club Image Gallery Page	Image 11 ✕ ...

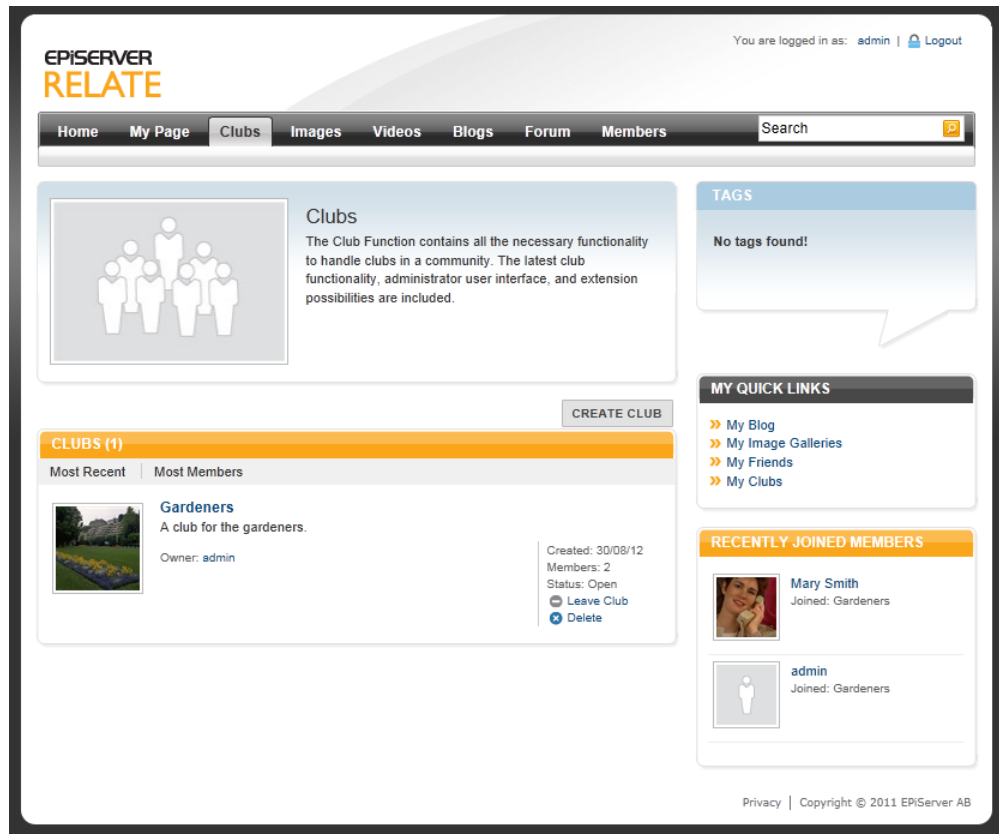
Content	Settings
Club Home Page	Home 8 ✕ ...
Club Article Page	Articles 15 ✕ ...
Club Wall Page	Wall 10 ✕ ...
Club error page	Club error 9 ✕ ...
Site Map Page	Site Map 40 ✕ ...
Not Member Page	Not Member 42 ✕ ...
General Error Page	Error 41 ✕ ...
Room Page	Room 25 ✕ ...
Article Page	[Article Container]... ✕ ...
Access Violation Page	Access Violation 39 ✕ ...
Meta Title	
Meta Keywords	
Meta Description	
Member Deleted Page	Member Deleted 38 ✕ ...
Search Page	Search 30 ✕ ...
Search Result Page	Search Result 31 ✕ ...

In the following parts of this documentation each community section, their configuration and main and sub-pages are described in more detail.

Club Pages

Club Main Page

The club main page in the EPiServer CMS view mode, shows an overview of existing clubs and member activities, in addition to the general area. Community members can create clubs of their own.



For the listed existing clubs on the main page, members of the community can apply for membership in clubs of their choice. Existing club members can choose to leave a club in which they are member.

Clubs can be open for any community member to join and view content, or closed. If a club is closed, the content of the club will not be visible to the community. Membership in closed clubs also has to be approved in advance by the club owner.

Club Home Page

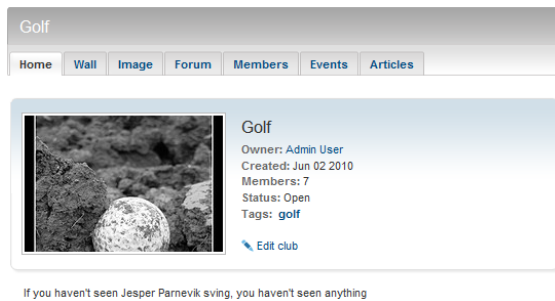
Clicking on a club link will take you to the club home page where you will find tabs with club functions Wall, Image, Forum, Members, Events and Articles. You will also see club activity information such as calendar events, members, images and club topics. Club owners can administer membership applications to closed clubs from here.

The screenshot displays the EpiServer Relate interface. At the top, the user is logged in as 'admin'. The main navigation bar includes links for Home, My Page, Clubs, Images, Videos, Blogs, Forum, and Members, along with a search bar. The 'Clubs' section is active, showing a list of clubs with 'Gardeners' selected. The 'Gardeners' club page features a header with navigation tabs (Home, Wall, Image, Forum, Members, Events, Articles) and a main content area. The main area includes a club profile with a photo, owner information (admin), creation date (Aug 30 2012), member count (2), and status (Open). Below this is a section for 'UPCOMING EVENTS (1)' featuring a 'Garden Event' with details on host, location, time, and RSVP status. To the right, there is a 'TAGS' section (no tags found), 'MY QUICK LINKS' (My Blog, My Image Galleries, My Friends, My Clubs), a 'CALENDAR' for August 2012, and a 'MEMBERS' section listing Mary Smith and admin. At the bottom, there is a 'TOPICS (1)' section with a topic titled 'Watering'.

- **Wall** is where club members can post messages. These messages will be visible to other club members. Club members can reply to messages posted on the wall.
- **Image** is where club members can share images related to club topics and content.
- **Forum** is where club members can participate in discussions concerning club related topics.
- **Members** is where club members find an overview of club members. Members can be listed alphabetically or according to their membership date.
- **Events** is where club events are listed. Events are managed by the club owner. Club members can view the event information, see the attendee list for the event and sign up to attend.
- **Articles** is where club members will find editorial articles (not member generated) published in the community and which are of interest to a specific club.

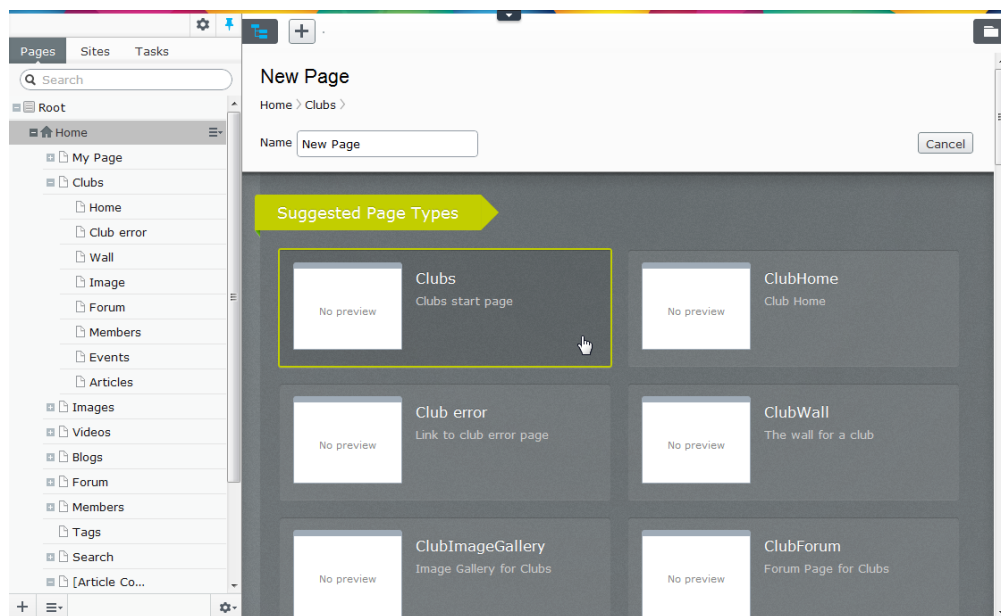
Other Club Page Types

When the club main page has been created, you will need to create and configure container pages for each of the club sections Home, Wall, Image, Forum, Members, Events and Articles. You can also create a club error message telling visitors that a club is closed or that membership is required to view content.



These functions all have their specific page types as mentioned earlier. These page types will make the various club functions appear as tabs in each club created in the community.

Right-click on the club page to create the club functions. The specific club function page types will be displayed.



These page types contain no editor areas since they are only used as containers, and thus hold no information of their own. You only have to provide a name for the page and then save and publish it.

- **ClubHome.** Provides a home link for the club.
- **ClubWall.** Provides a wall for the club where members can add messages.
- **ClubImageGallery.** Provides an image gallery for the club.
- **ClubForum.** Provides a forum page for the club.
- **ClubMembers.** Provides a member page for clubs.
- **ClubEvent.** Provides a calendar events page for clubs.
- **ClubArticles.** Provides an article section listing articles published in the community and related to the club.
- **Club error.** Provides a page telling the visitor that a club is closed or that membership is required to view club content.

Configuring Club Pages

All of the club pages except **ClubArticles** must be pointed out under Content in the start page configuration as described earlier. Remember that these pages are only for displaying community content in

EPiServer CMS view mode. The content itself must be moderated and maintained from the Community administration interface.

Clubs Roles

Visitors

A place where visitors can view information on the club main page. Visitors can also see certain information on home pages of open clubs. Information that can be viewed is the home page information, member information and articles, the rest is only available to club members.

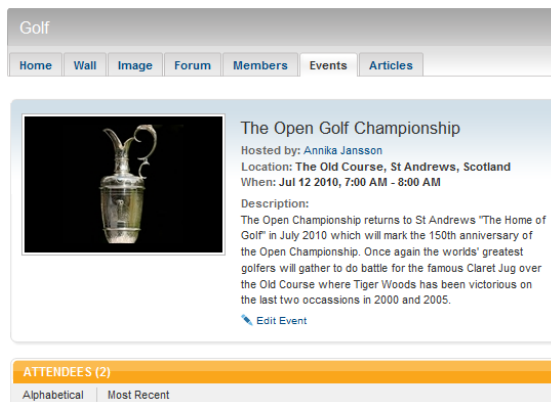
Members

Club members can also view information on the club main page. Community members as well as club members can create new clubs as well join or request membership in existing open or closed clubs owned by other community members. Members of a club can post images and forum messages and sign up for attending club events.

Owners

A club is owned by the community member that has created the club. Club owners can maintain their own clubs in the following ways:

- **Edit club home page.** Club owners can edit information on the club home page, such as club name, presentation text and image, as well as club category and club tags.
- **Add club images.** Club owners, as well as club members, can add images to the Image section of the club.
- **Create club forum topics.** Club owners, as well as club members, can add forum topics to the club.
- **Create and edit club events.** Club owners can create and update events in the event calendar of the club.



When creating or editing an event, you can enter the name of the event, the arranger, the location, event status open/closed, start and end time, registration start and end time, maximum registrations, as well as a description of the event and a presentation image.

You can also set a category and a tag for the event.

Editors/Moderators

The club functions are built up using these page types in a hierarchic page tree structure: Clubs, Club-Home, ClubWall, ClubForum, ClubImageGallery, ClubMembers and ClubEvents.

The page type **Clubs** is used for creating a club main overview page with an introductory text and an page image. This page provides an interface in EPiServer CMS for community members creating clubs. The club main page itself is maintained by the Editor from the edit mode of EPiServer CMS.

Create and edit a club main page as follows:

1. Create a new page using the page type **Clubs**, in this example it will be placed under the start page (Home) of the website.
2. In **Name**, name the page.
3. In **Main Body**, enter or edit the text.
4. In **Intro Image URL**, select an image to be displayed on the club main page.
5. In **Intro Image Alt Text**, enter an alternative text to be displayed for the image.
6. In the **Meta Title**, **Meta Keywords** and **Meta Description**, and enter meta information separated by comma. This information is picked up and displayed by search engines.
7. Save and publish the page.

Images and Image Galleries

Introduction

The EPiServer Relate **Image Gallery** function stores and manages images of many types. Through image galleries community members can share images and members can create their own image galleries which will be displayed under the **Images** section of the start page in EPiServer Relate. Images can be cropped, rotated and most importantly, given thumbnails of multiple sizes and types, on the fly. Image galleries can be categorized and searched for from the images main page. Images are administered by members from View mode.

Images Main Page

The Images section of the start page provides an entrance to exploring images of the community. The Image main page shows a selection of existing image galleries, in addition to the general image gallery information area.

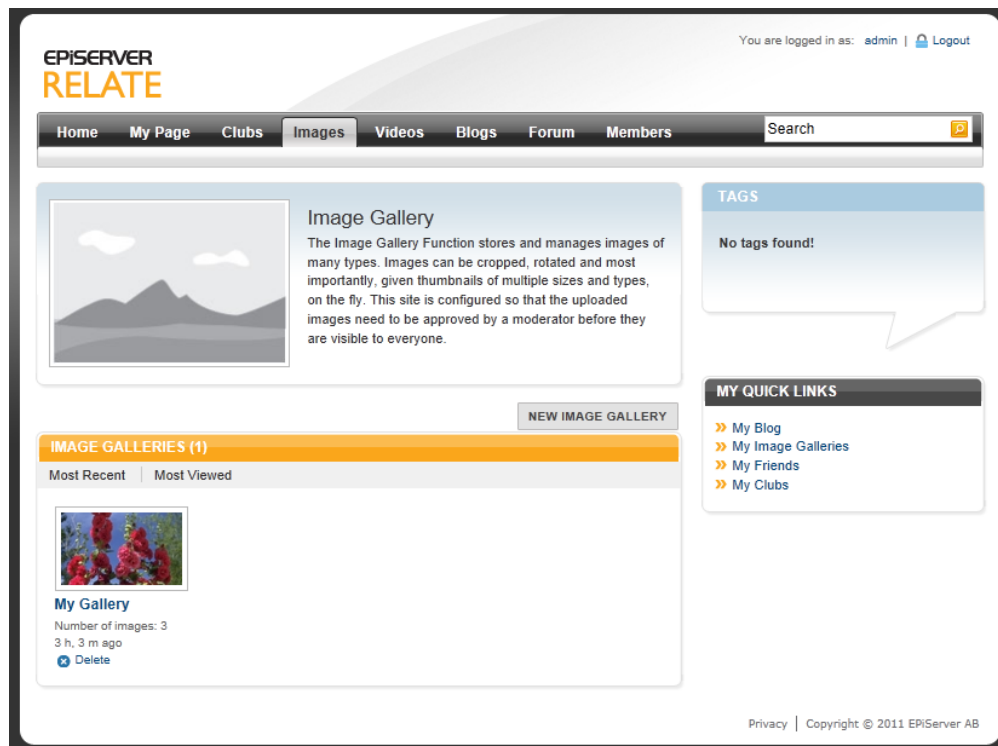


Image Gallery Page

Clicking on an image gallery link will take you to an image gallery page. Here the images in the gallery are displayed as well as information about the gallery and the gallery owner. From here the image gallery owner can edit the gallery information and upload images.

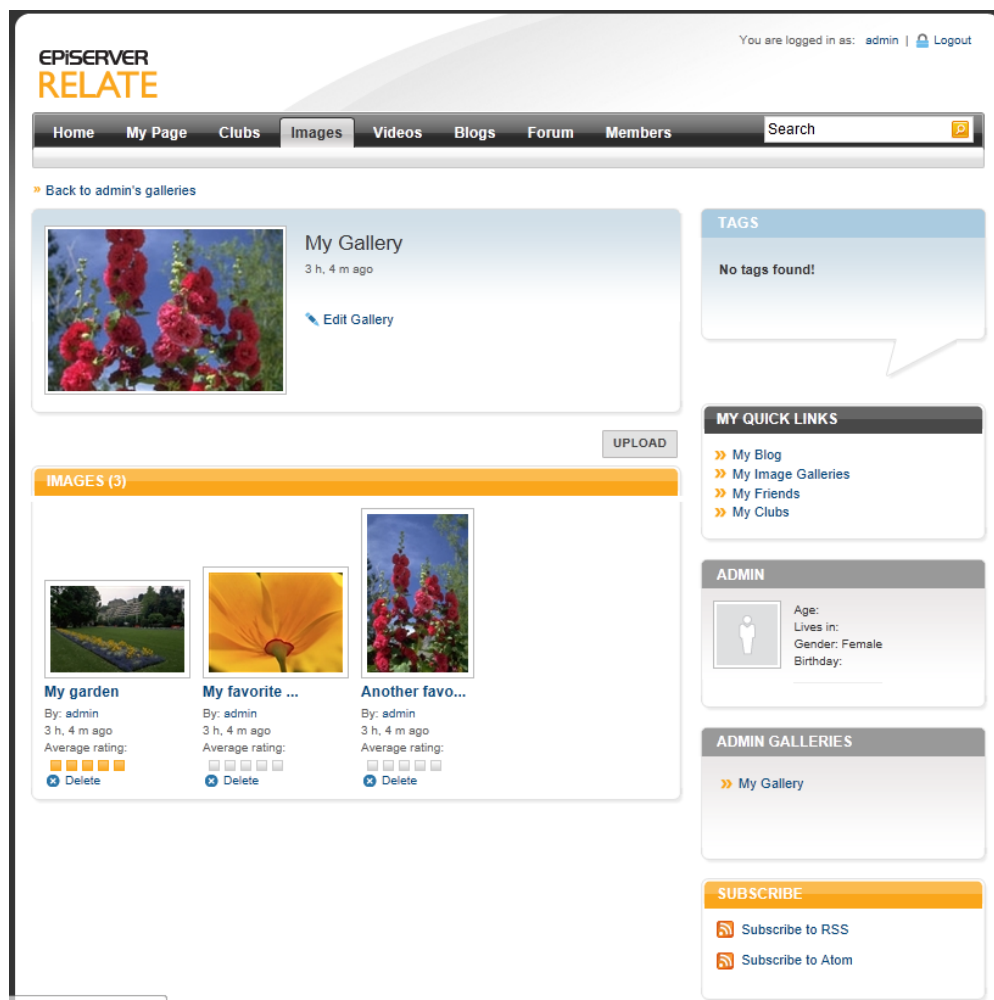
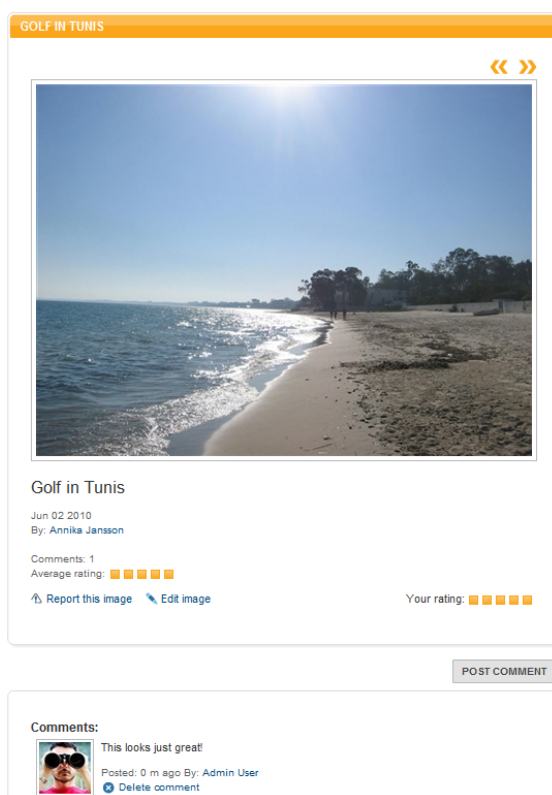


Image Page

Clicking on an image link will take you to an image page where the image is shown in larger size. Time of posting, name of poster, tags, comments and average rating is shown for the image.



The viewer (members only) of the image can rate the image and post a comment. Comments to the image will also be listed, as well as information about who has posted a comment.

My Image Gallery

The My Image Galleries page displays image galleries for a specific community member. From this page the community member can also edit and create new image galleries. When creating a gallery you provide a name, a description and preferably a category and a tag to make it easier to find the images when searching the community.

Other Image Gallery Page Types

The remaining page types will provide an overview of a members image galleries, an overview of an image gallery, and a view of a single image in this gallery. The page structure is set up using specific page types as described below. Each of these pages are then pointed out in the start page configuration.

- **MyImageGallery** provides an overview and container page for image galleries of an individual community member. In this example, content in the main body area of the page is displayed as dynamic content from the main body of the image gallery main page. This means that if the text in the main body of the images main page is updated, it will also be reflected in the general area of the My Image Gallery page. Create and edit a **MyImageGallery** page type in the same way as described in *Image Gallery Roles*. The **Main Body** area only needs to be entered if you want to add text in addition to what is displayed through dynamic content.
- **Images** provides an image gallery overview. Create and edit a **Images** page type in the same way as described in *Image Gallery Roles*. The intro image is only shown when the image gallery is empty, and will be replaced when images are uploaded.
- **ViewImage** provides a view for a single image. The page contains no editorial information, it is only used for providing a display format for single images. You only have to provide a name for the page and then save and publish it.

Configuring Image Pages

Each of the image gallery pages created here must be pointed out under **Content** in the start page configuration as described earlier.

Image Galleries Roles

Visitors

Visitors to image galleries and images can view the galleries and the images, but cannot rate or post comments to images.

Members

Community members can view galleries and images, as well as create new image galleries and upload images to these. Members can also rate images and post comments to images.

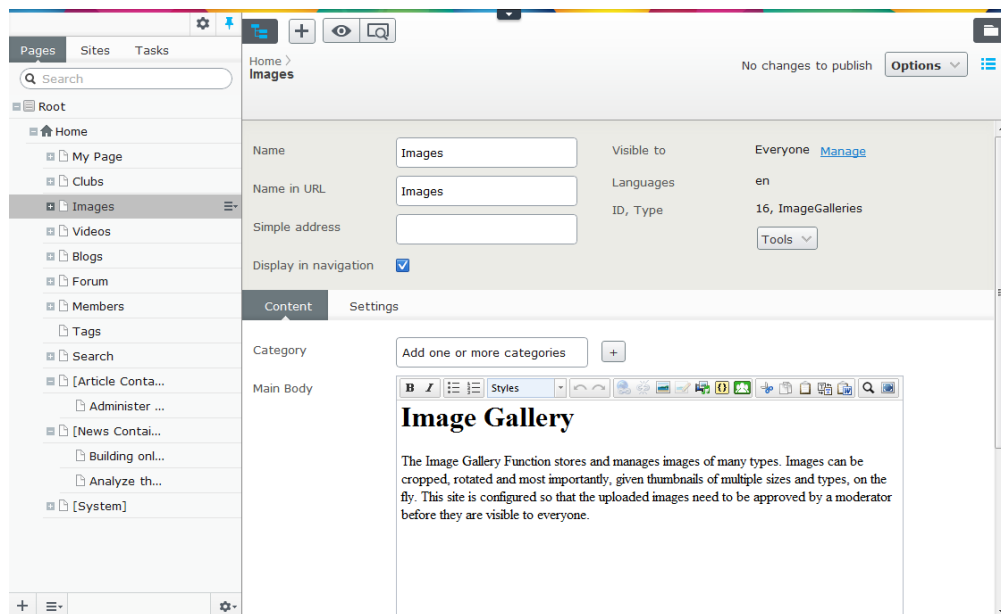
Owners

The uploader of the image becomes the owner. The image owner can edit the image information, and delete the image from the image gallery.

Editors/Moderators

The image gallery functions are built up using these page types in a hierarchic page tree structure: **ImageGalleries**, **MyImageGallery**, **Images** and **ViewImage**.

The page type **ImageGalleries** is used for creating the Images main page on the top level in the structure. The page functionality provides the main listing of image galleries. From the **Forms Editing** mode in EPiServer CMS, the editor can add a text and an image to the images main page.



Create and edit an image gallery main page as follows:

1. Create a new page using the page type **ImageGalleries**, in this example it will be placed under the start page (Home) of the website.
2. In **Name**, name the page.
3. In **Main Body**, enter or edit the text.
4. In **Intro Image URL**, select an image to be displayed on the club main page.

5. In **Intro Image Alt Text**, enter an alternative text to be displayed for the image.
6. In the **Meta Title**, **Meta Keywords** and **Meta Description**, and enter meta information separated by comma. This information is picked up and displayed by search engines.
7. Save and publish the page.

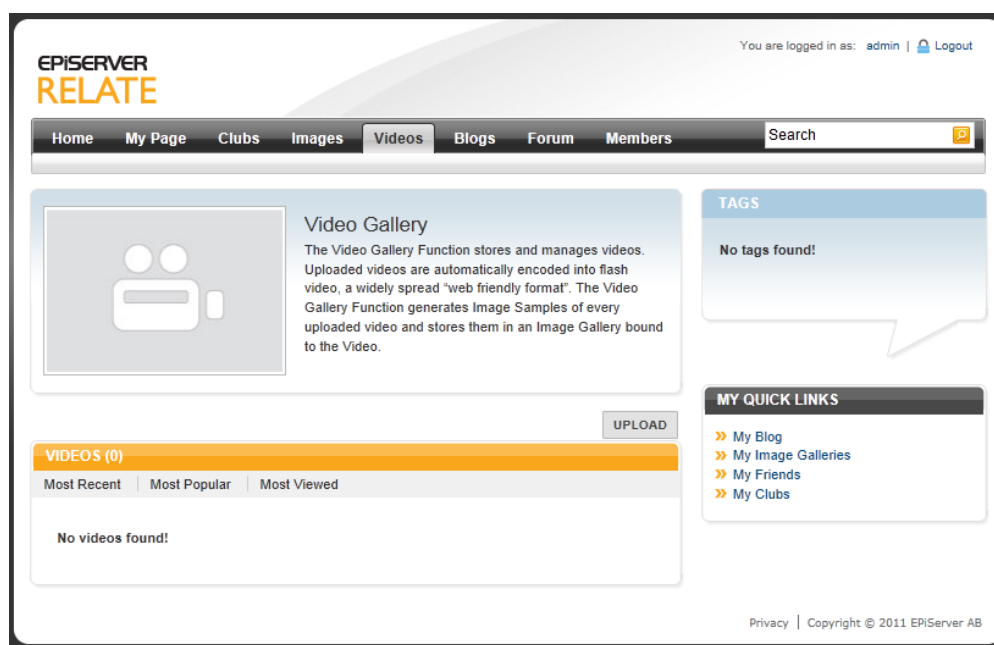
Videos

Introduction

The EPiServer Relate **Video Gallery** function stores and manages videos enabling community members to share their videos. Uploaded videos are automatically encoded into flash video, a widely spread “web friendly format”. Flash video provides fast, lightweight and platform independent playback. The Video Gallery function generates **Image Samples** of every uploaded video and stores them in an image gallery bound to the video, providing a fast overview of the video, while saving performance and bandwidth. The functionality resembles that of the image galleries. Community members can upload videos, and other members can rate and comment the videos. Videos are administered by members from View mode.

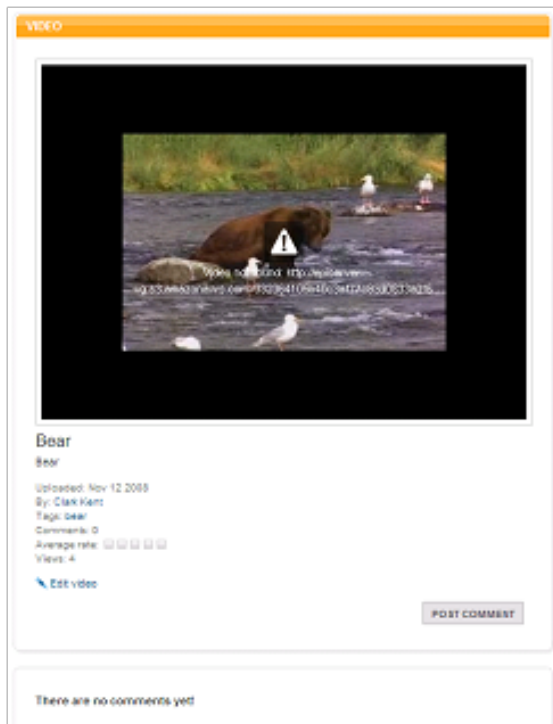
Videos Main Page

The **Videos** main page shows a selection of existing videos, in addition to the general video gallery information area. From here it is possible to search for categorized videos, as well as to upload new videos to the website.



Video Page

Clicking on a video link will take you to a video page where the video can be played. Date for uploading, name of the uploader tags, comments and average rating is shown.



The viewer of the image can rate the image and post a comment. Comments to the image will also be listed, as well as information about who has posted the comments.

The uploader of the video can edit the video information from here.

It is also possible to report a video from here. Abuse reporting information is managed by the Editor/Moderator from the Community administration interface.

Video Player Page

The page type **VideoPlayer** provides a view for a video. The page contains no editorial information, it is only used for providing a display format for single images. You only have to provide a name for the page and then save and publish it.

Configuring Video Pages

The video main (gallery) page created here must be pointed out under **Content** in the start page configuration as described earlier.

Videos Roles

Visitors

Visitors to the video gallery can play videos, but cannot rate or post comments to videos.

Members

Community members can play videos, as well as upload new videos to the website. Members can also rate videos and post comments to videos.

Owners

The uploader of the video becomes the owner. The video owner can edit the video information, and delete the video from the website.

Editors/Moderators

The video functions are built up using the page types **Videos** and **VideoPlayer**. The page type Videos is used for creating the video gallery and Videos main page. The page functionality provides a listing of videos. From here, community members can also upload videos to the video gallery. From Edit mode, the editor can add a text and an image to the images main page. VideoPlayer is used for the display of a single video.

Create and edit a **Video** main page type in the same way as described in *Image Galleries Roles*. In **Intro Image URL**, select an image to be displayed on the Video main page. In the **Intro Image Alt Text**, enter an alternative text to be displayed for the image.

Blogs

Introduction

The EPiServer Relate **Blog** function provides a blog tool which can be used to manage one or many blogs or guestbooks on a website or within a community. Under **Blogs** on the start page in EPiServer Relate, community members can create their own blogs and view other members blogs. The blogger administers the blog from View mode. The same rich text editor as in EPiServer CMS, is also used when you write blog posts. An image gallery will be created for each blog for storing images inserted into blogs.

The blog function is built to manage either standalone blogs with many contemporary users, or complex community blogs where all users, clubs, and experts use blog functionality. Included in the EPiServer Relate blog feature is the administrator user interface, as well as extension possibilities to other Community functions.

The MetaWeblog API is supported, which means that you can use your favorite blog application, such as iBlogger for the iPhone or Live Writer for Windows, when creating or editing blog posts. The URL you should use is the URL to "My blog" for the specific user, for example, <http://relateurl.com/en/Blog/My-Blog/?userId=3>. Blogs can also be syndicated from other blog providers.

Blog Main Page

The Blogs main page shows most recent blogs entries and most active bloggers, in addition to the general blog information area. You can chose to view most popular, most viewed or most commented blog postings.

EPISERVER
RELATE

You are logged in as: [admin](#) | [Logout](#)

Home My Page Clubs Images Videos **Blogs** Forum Members Search

Blogs

The Blog Function provides tools that can be used to manage one or many blogs or guestbook's. The Blog Function is built to manage either standalone blogs with many contemporary users or complex community blogs where all users and clubs use blog functionality. The blogger can administrate the blog from the View Mode.

CREATE ENTRY

BLOG ENTRIES (2)

Most Recent | Most Popular | Most Viewed | Most Commented

Pretty Flowers
Posted: 0 m ago By: admin
About pretty flowers that I find.
Tags: [flower](#)
Comments: 0
Views: 0
Average rating: ☐ ☐ ☐ ☐ ☐
[Delete](#)

My Garden Diary
Posted: 1 m ago By: Mary Smith
Come and follow my gardening activities...
Tags: [flower](#), [garden](#), [green](#)
Comments: 0
Views: 0
Average rating: ☐ ☐ ☐ ☐ ☐
[Delete](#)

TAGS
[flower](#) [garden](#) [green](#)

MY QUICK LINKS

- » [My Blog](#)
- » [My Image Galleries](#)
- » [My Friends](#)
- » [My Clubs](#)

MOST ACTIVE BLOGGERS

Pretty Flowers
About pretty flowers that I find.

My Garden Diary
Come and follow my gardening activities...

SUBSCRIBE

- [Subscribe to RSS](#)
- [Subscribe to Atom](#)

Privacy | Copyright © 2011 EPiServer AB

Blog Page

Clicking on a blog posting link will take you to the blog view page. From here you can read the full blog posting, rate it and add comments to it.



MyPage Blog for User 'Mary Smith'
Category:
[Report this blogger](#) [Edit blog](#)
[Syndicate blog](#)

CREATE ENTRY

BLOG ENTRY

Summer in Stockholm

Posted: 6 m ago
Average rating:

Summer in Stockholm is great, this is the most beautiful city in the World!

Tags: [stockholm](#), [summer](#)
Comments: 1 Views: 1

[Report this entry](#) [Edit entry](#) Your rating:

POST COMMENT

Comments:



I agree
I totally agree with you.
Posted: 0 m ago By: Admin User
[Delete comment](#)

SYNDICATE BLOG

Feed URL
 [ADD](#)

FEEDS

[REMOVE](#) [Blogs](#)

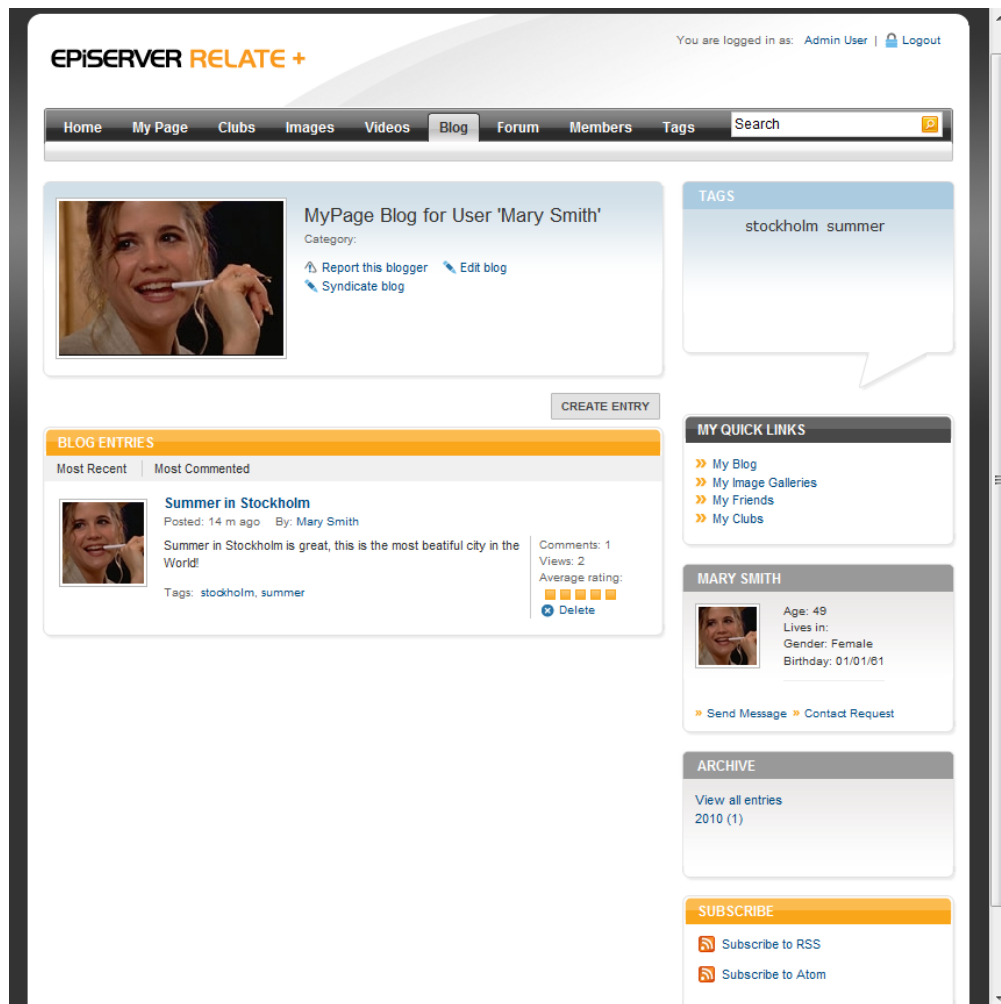
OK

Other comments to the posting are also listed below the posting. From here it is possible to report the blog entry or a comment to it.

Blogs can be syndicated from other blog providers. This is set up on the My blog page and supports both Atom and RSS.

From the upper section of the blog page, the owner of the blog can edit the blog page and add a presentation text and image, as well as categorize the blog content for search purposes.

Clicking on **View all entries** under Archives in the left column will display all entries in the current blog, providing an overview of the blog. and access to other entries in the same blog.



My Blog Page

The page type **My Blog** provides a view for a single blog. The page contains no editorial information, it is only used for providing a display format for single blogs. You only have to provide a name for the page and then save and publish it.

Configuring Blog Pages

The **My Blog** page created here must be pointed out under **Content** in the start page configuration as described earlier.

Blog Roles

Visitors

Visitors to the blogs can read community members blog postings, but cannot rate or comment any blog postings.

Members

Community members can read blog postings of other members, and can rate the postings as well as add comments to postings and other members comments. Members can also report blog postings.

Owners

The creator of the blog is the owner. The blog owner can edit the blog page and add a presentation text and image, as well as categorize the blog content for search purposes. The owner can also create new blog postings.

Editors/Moderators

The blog functions are built up using the page types **Blog** and **MyBlog**. The page type Blog is used for creating the blog main page. The page functionality will provide the listing of blog entries in community member blogs. The blog entries can be displayed either based on posting date or most popular, commented or viewed. From the EPiServer CMS Edit mode, the Editor can add a text and an image to the blog main page.

Create and edit a **Blog** main page type in the same way as described in *Clubs Roles*.

Forums

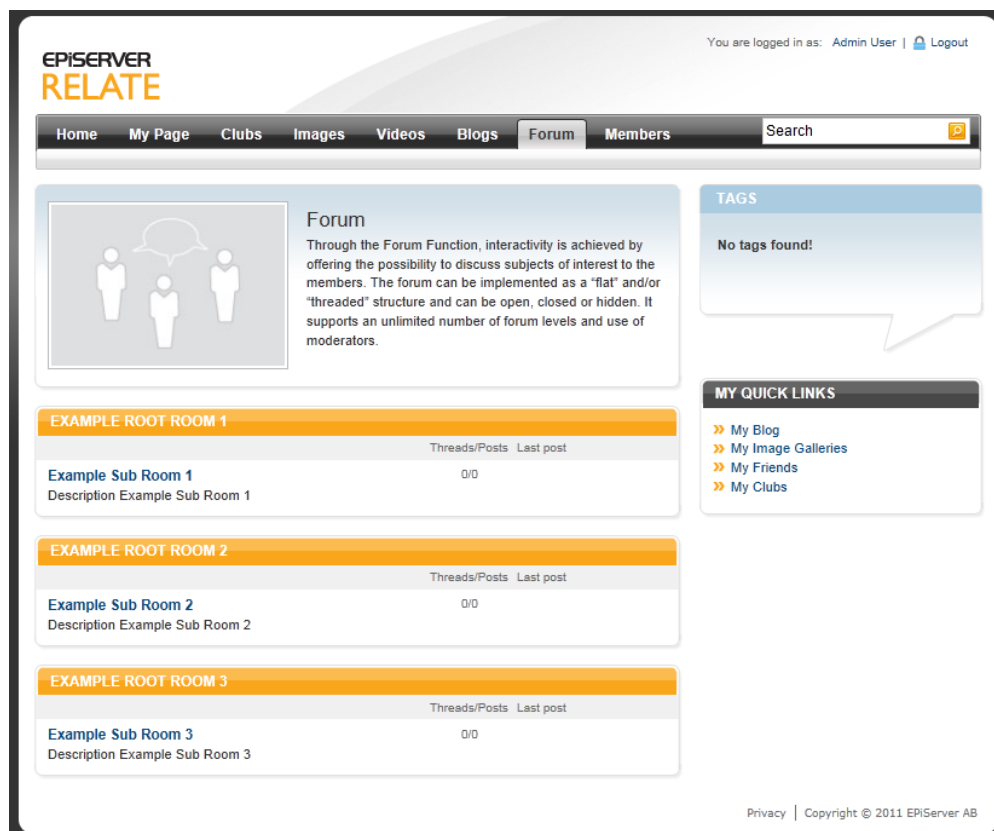
Introduction

Through the EPiServer Relate **Forum** function, interactivity is achieved by offering the possibility to discuss subjects of interest to community members. Moderators as well as members can be granted enhanced administrative rights such as edit, move and delete topics, delete and lock discussions, place announcements, etc. The forum can be implemented as a "flat" and/or "threaded" structure and can be open, closed or hidden. An unlimited number of forum levels and use of moderators is supported, and it is also possible to add polls to forum topics.

As an example, you can have one or more "forums" [Club Forum and Travel Forum] on root level, and under each forum a structure of "rooms" [Europe, America, and, Africa etc]. There is no limit to how large the structure can be. In each room there can be one or more topics that can be set by administrators or users.

Forum Main Page

In this example, the Forum main page has a general information area and a section displaying available discussion forums. The functionality is built in a hierarchic structure with forums on top followed by rooms, topics and replies. A forum can have several rooms, each holding their topics. A topic can have several replies. For each room on the forum main page, the number of threads and posts are displayed, as well as the date for the latest post and name of poster.



Room Page

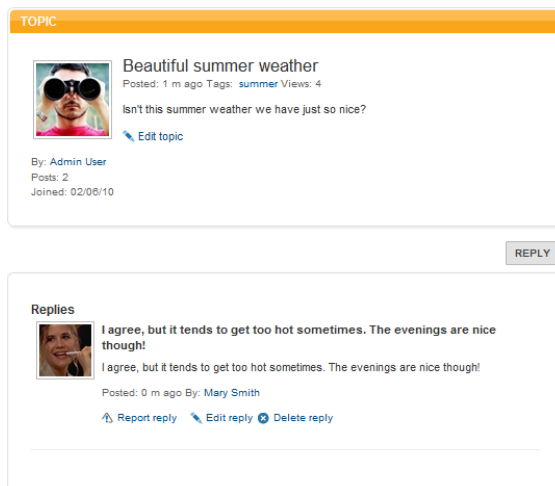
Clicking on a forum discussion room link will take you to the view discussion room page. Available discussion topics are listed, together with number of replies and latest posting details. From here community members can create new topics within the discussion room.



Topic Page

Clicking on a topic link will take you to the view topic page. Here details such as author and publishing time for the topic, are displayed.

Replies to the specific topic are listed below. From here, logged in community members can reply to topics. It is also possible to abuse report topics or replies.



Forum Roles

Visitors

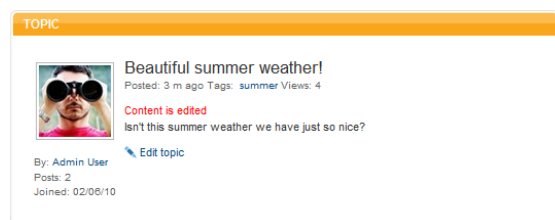
Visitors to the community forum pages can read forum content but cannot post replies or report any postings.

Members

Community members can create topics in open discussion rooms, and can post replies to topics in these. Members can also report topics and replies posted by other members.

Owners

The creator of a forum topic or a reply becomes the “owner”. Owners can edit their topics and they can edit or delete their own replies. Note that topics cannot be deleted from View mode, this can only be done from the community administration interface.



Editors/Moderators

The forum functionality is built up by page types Forum, Room and Topic placed in a hierarchic structure. The page type Forum is used for creating the forum main page. The page functionality will provide the listing of available forum rooms in addition to the general area with its text and image. These can be updated from the EPiServer CMS editorial interface.

Create and edit a **Forum** main page type in the same way as described in *Clubs Roles*.

- **Room Page.** The page type Room provides a view for a forum room page. The page contains no editorial information, it is only used for providing a display format for rooms. You only have to provide a name for the page and then save and publish it.

- **Topic Page.** The page type Topic provides a view for a forum topic page. The page contains no editorial information, it is only used for providing a display format for topics. You only have to provide a name for the page and then save and publish it.

Configuring Forum Pages

The Room and Topic pages described here must be pointed out under Content in the start page configuration as described earlier.

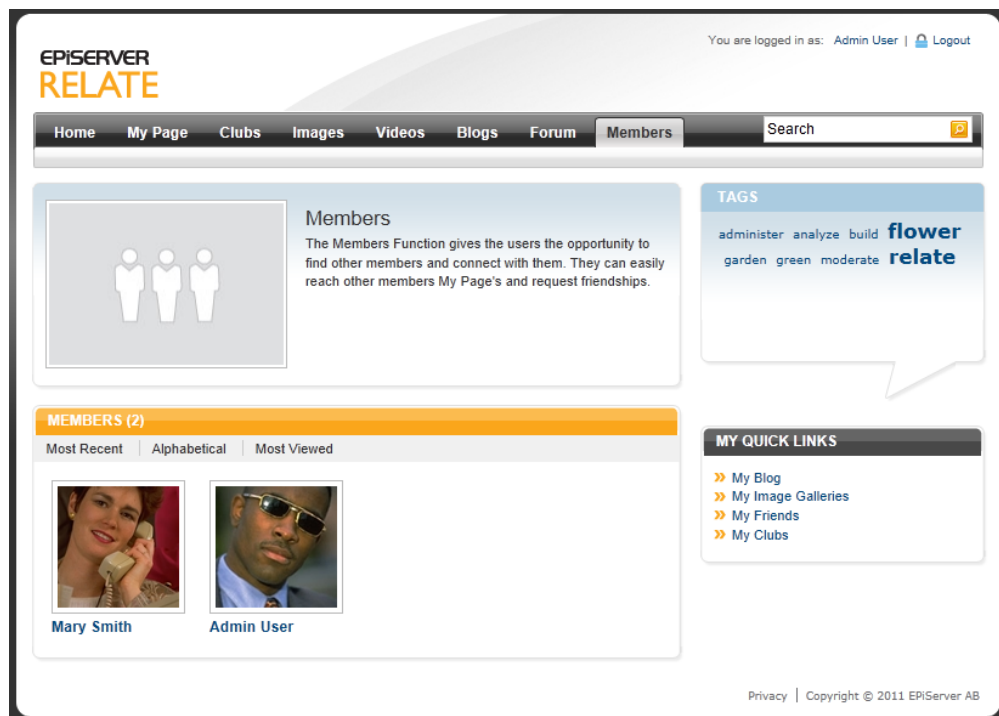
Members

Introduction

The EPiServer Relate **Member** function serves as a foundation for the user's personal page and provides a fast and easy way to aggregate content from other functions. Information about a single community user is contained on the **MyPage** view. The **Members** section in EPiServer Relate displays information about members of the community. Here users can find other members and connect with them. The main page in EPiServer Relate shows recent members and also provides possibility to view members alphabetically or find most viewed members of the community.

Members Main Page

In this example, the Members main page has a general information area, a search section and a listing of community members underneath.



Members MyPage

Clicking on a member name link will take you to the personal **My Page** view for a member. My Page displays personal details for the member together with other information such as latest visitors, friends, blog entries, images and videos. The tag cloud for tags associated with the member is also shown.

The screenshot shows the EPiServer RELATE website interface. At the top, it says "You are logged in as: Admin User | Logout". The navigation bar includes links for Home, My Page, Clubs, Images, Videos, Blogs, Forum, and Members, along with a search bar. The main content area is divided into several sections:

- LATEST VISITORS:** Shows a profile for Mary Smith, visited 0 m ago.
- FRIENDS:** Shows a profile for Mary Smith, friends since 30/08/12, with a "View all (1)" link.
- BLOG ENTRIES:** Shows a post titled "Pretty Flowers" with 0 comments, posted 7 m ago, with a "View all (1)" link.
- Admin User Profile:** Displays a profile picture and details: Age, Lives in, Gender: Female, Birthday, and an "Edit Settings" link.
- Activity Tabs:** Includes "News feed", "Mini feed", "Wall", and "Inbox (0)". The "Wall" tab is active, showing "No activity yet!".
- TAGS:** A cloud tag for "flower".
- MY QUICK LINKS:** Includes links to "My Blog", "My Image Galleries", "My Friends", and "My Clubs".
- LATEST IMAGES:** Displays three small image thumbnails with a "View all (3)" link.
- VIDEOS:** Shows "No videos found!" with a "View all (0)" link.
- SUBSCRIBE:** Includes links to "Subscribe to RSS" and "Subscribe to Atom".

The **My Page** center displays the “mini feed” area showing recent activities for this member. Under the **Wall** tab, other members can leave messages that will be visible to the community for reading. It is possible for members to delete their own wall entries.

This close-up shows the "Wall" tab selected in the activity menu. It displays a message from Mary Smith: "I liked your latest comment!". The message includes a small profile picture, the text "Posted by: Mary Smith", and a timestamp of "0 m ago". Below the message are two buttons: "Delete" and "Reply".

Community members can leave personal messages to each other, and request friendship from a members My Page. You need to be registered and logged on to the community in order to request friendship and leave messages.

Members MyFriends

Clicking on the Friends link for a member takes you to the **My Friends** page. This page displays information about the friends of a specific community member. It is also possible to list friends alphabetically, and to view friends that are online.



Members

The EPiServer Community Members Function gives the users the opportunity to find other members and connect with them. They can easily reach other members My Page's and request friendships.

ADMIN USER'S FRIENDS

Most Recent | Alphabetical | Online



Annika Jansson
[Delete](#)



Mats Hellström
[Delete](#)

Members Roles

Visitors

Visitors to the community member pages can read member content but cannot post messages or request friendship.

Members

From the My Page for a member, community members can send messages to the owner of the page, as well as request friendship and post messages on the wall.



Mary Smith
 Age: 49
 Lives in:
 Gender: Female
 Birthday: 01/01/81

[» Edit Settings](#)

Owners

My Page owners can maintain their personal information from the page by clicking **Edit Settings**. Information entered here will be presented in the community as profile information for the individual member.

Editors/Moderators

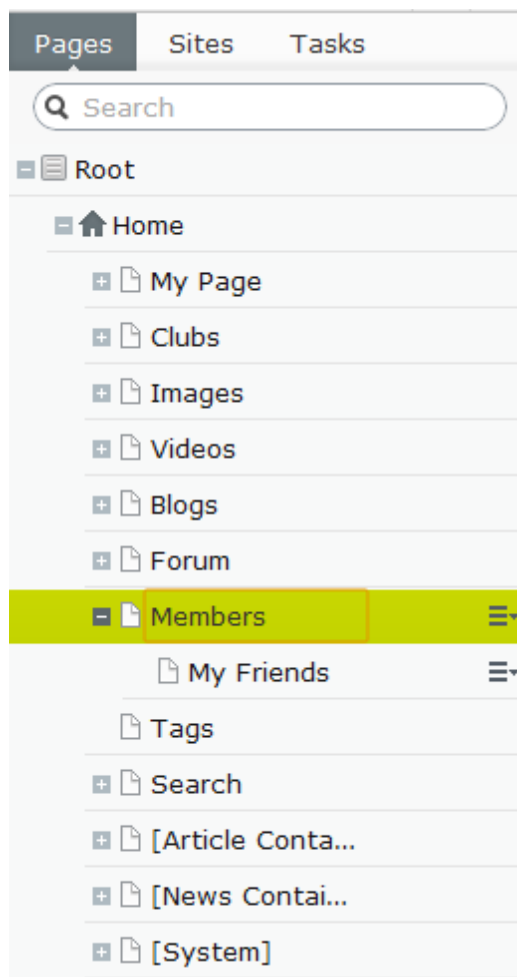
The Members section is built up with page types **Members**, **My Friends**, **My Page** and **My Settings**. These pages are arranged in the EPiServer CMS page tree, and are used for displaying and grouping community member information and holds little information of their own. Instead, the personal member content is stored in the community database and managed from the community administration interface.

Create and edit a **Members** main page type in the same way as described in *Clubs Roles*.

- **My Friends Page.** The purpose of the MyFriends page type is to list friends connected to a community member, and to display the personal profile information of connected friends. The upper section of the page contains a general information area, and the page type has an editorial field where you can enter text and link to an image, just as for the members main page. In this example, the information displayed in the upper section of the My Friends page will be the same as for the members main page. This is solved using dynamic content, which displays main body content from the members main page.
- **My Page.** The page type MyPage provides a view for a forum topic page. The page contains no editorial information, it is only used for providing a display format. You only have to provide a name for the page and then save and publish it.
- **My Settings Page.** The page type MySettings provides a view for a forum topic page. The page contains no editorial information, it is only used for providing a display format. You only have to provide a name for the page and then save and publish it.

Configuring Members Pages

The My Friends, My Page and My Settings pages mentioned here must be pointed out under **Content** in the start page configuration as described earlier.



Managing Content

One of the differences between an "ordinary" website and a community site is that content can be created both by "internal" editors, as well as by "external" community members. In the EPiServer Relate sample site, content can either be created by editors from the EPiServer CMS editorial interface, or by community members through the various community channels. Content can be commented, tagged and rated, and associated with different community objects such as clubs. This section describes how to work with editorial and community content.

Editorial Content

Introduction

In EPiServer Relate you can work with content just as you normally do in EPiServer CMS. The page tree structure works the same way, and you can create content using ordinary EPiServer CMS page types and blocks.

Most likely, your site will be readily set up, meaning that you will not need to create any of the community related pages, and only occasionally will you need to update the existing information in these. It may also be that the community related page types will be hidden in your setup and will thus not be available in Edit mode when creating new pages.

In this example, the start page displays information that is both community generated and editor generated. For instance, latest blog entries and new image galleries are community member generated content, whereas news and articles are generated from the Edit mode.

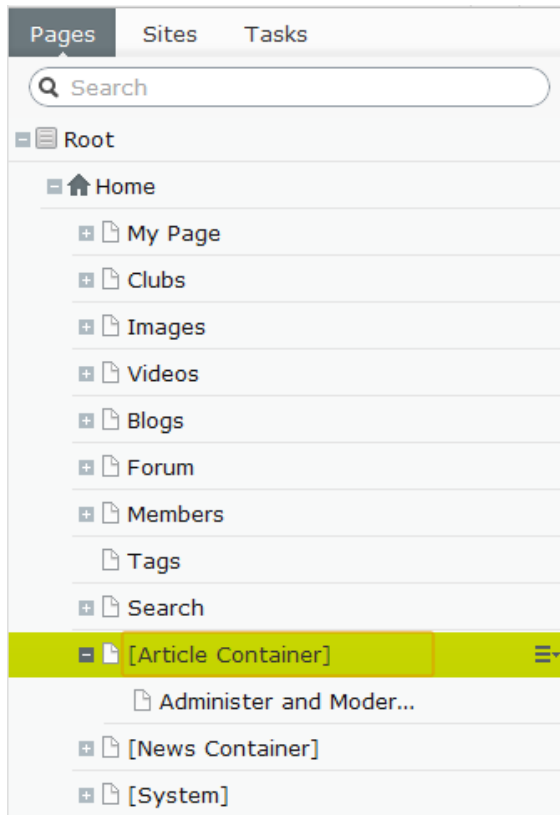
Here we will provide a few examples of how you can work with content in the EPiServer CMS edit mode, to be tagged and displayed in the integrated community site. In this example we have created a news function and an article section which will be displayed on the community start page. Both of these content types can be tagged and associated with related community objects such as clubs and forum rooms.

Articles

Editorial content can be for instance articles created by editors or community members. In this example, articles are created by editors from the EPiServer CMS edit mode, but it is also possible to create an interface making it possible for community members to submit articles for publishing in the community.

The screenshot displays the EPiServer Relate web application interface. At the top, the logo 'EPISERVER RELATE' is visible on the left, and a user login status 'You are logged in as: Admin User | Logout' is on the right. A navigation bar contains links for Home, My Page, Clubs, Images, Videos, Blogs, Forum, and Members, along with a search box. The main content area features an article titled 'Administer and Moderate your online community' by Robert Smith, posted on 28/02/11. The article includes an average rating of 4.5 stars and tags: administer, moderate, relate. The text describes the capabilities of EPiServer Relate for managing online communities, such as creating events, chat, and competitions. A 'Your rating' section with five stars and a 'POST COMMENT' button are located below the article text. To the right of the article, there is a 'TAGS' section with a list of tags including 'administer', 'analyze', 'build', 'flower', 'garden', 'green', 'moderate', and 'relate'. Below the tags is an 'ARTICLES' section with a sub-header 'Administer and Moderate' and a brief description of the article's content. At the bottom of the page, there is a 'COMMENTS' section with the message 'No comments found!'. The footer contains a 'Privacy' link and a copyright notice for 2011 EPiServer AB.

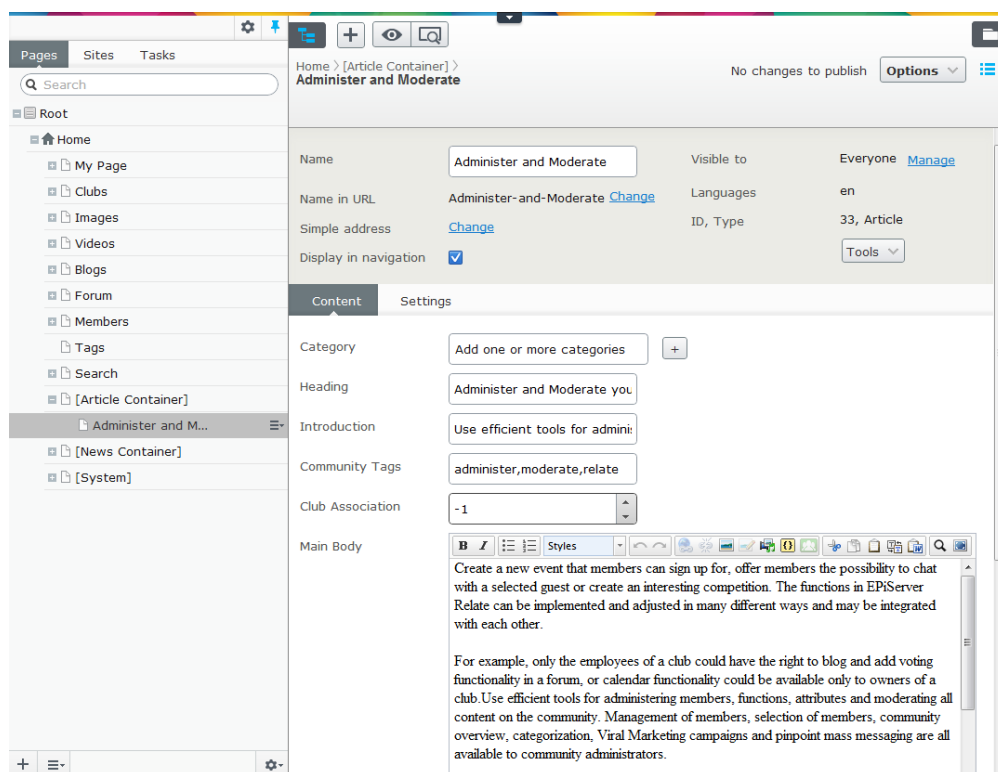
In this Relate sample site, you will find an article container with articles as sub-pages underneath, all based on the page type **Article**. The functionality of this page type makes it possible to associate articles with clubs of related interests, so that related articles will be listed in the article section of a club. Also, related clubs of interest will be listed on the article page.



Recently published articles will also be listed on the community start page as well as in the right column of the article. EPiServer CMS will fetch the listing from the articles listed under the page named **[Article Container]**.

Create an article as follows:

1. Create a new page using the page type **Article**, in this example it will be placed under the **[Article Container]** page for the article listing to work.
2. In **Name**, name the page.
3. In **Forms Editing** under Content, enter an introduction to be displayed in listings in the **Introduction** field.
4. In **Club Association**, select an associated club. This will provide the linking to the article section of a community club.
5. Enter or edit the text in the Main Body editor area.
6. In **Author Name**, type the name for the author of the article.
7. In **Meta Title**, **Meta Keywords** and **Meta Description**, enter a meta title, meta keywords (comma separated) and a description. This information is picked up and displayed by search engines.
8. Select **Disable Comments and Rating** if you do not want the article to be subject for commenting and rating.
9. Select **Comments Need Moderation** if you want the article to be commented and want to be able to moderate comments before they become public. The article comments will have status “pending” until it is approved in the **Community Approval** gadget on the Dashboard.
10. Save and publish the page.



News

Editorial content can also be a news section where community editors can push news to the community. In this example, news are created by editors from the EPiServer CMS Edit mode, and are listed in the left column of the community start page.

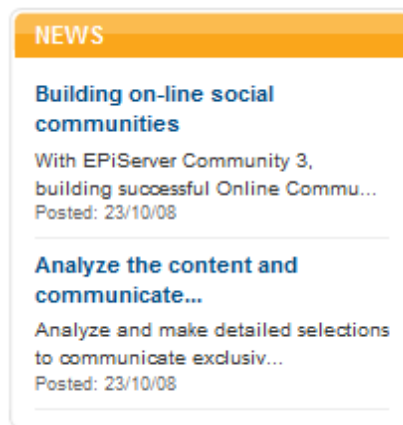
Just as for the article section described previously, the news function is built up using a container page with sub-pages underneath. In this site example, you will find an news item container with news items as sub-pages, all based on the page type News. EPiServer CMS will fetch the listing from the news listed under the page named **[News Container]** as shown below.

Similar as for articles, the functionality of the **News** page type makes it possible to associate news with community objects. For news, it is possible to tag a news item with community tags, and to link a news item to a forum room.

Tagging the news item with a community tag will include the news item in the community tag cloud. Associating the news item with a forum room will make the news item appear in relation to the selected forum topic.

Create a news item as follows:

1. Create a new page using the page type **News**, in this example it will be placed under the **[News Container]** page for the news listing to work.
2. In **Name**, name the page.
3. In **Forms Editing** under Content, enter an introduction to be displayed in listings in the **Introduction** field.
4. In **Community Tag**, enter a tag to include the news item in the community tag cloud.



5. In **Forum Room Association**, select a forum room to associate the news item with. This will make the news item appear in relation to a forum topic.
6. In **Main Body**, enter the news item text.
7. In the **Author Name**, type a name for the author of the article.
8. In **Meta Title**, **Meta Keywords** and **Meta Description**, enter a meta title, meta keywords (comma separated) and a description. This information is picked up and displayed by search engines.
9. Select **Disable Comments and Rating** if you do not want the article to be subject to commenting and rating.
10. Select **Comments Need Moderation** if you want the news item to be commented and want to be able to moderate comments before they become public. The news item comments will have status “pending” until it is approved in the **Community Approval** gadget on the Dashboard.
11. Save and publish the page.

The screenshot shows the EPiServer CMS editor interface. On the left is a sidebar with a tree view showing the site structure: Root, Home, My Page, Clubs, Images, Videos, Blogs, Forum, Members, Tags, Search, [Article Container], [News Container], Building online so..., Analyze the cont..., and [System]. The main area is titled 'Building online social communities' and contains several sections:

- Metadata:** Name (Building online social commur), Visible to (Everyone), Name in URL (Building-online-social-comm...), Simple address, Display in navigation (checked), Languages (en), ID, Type (35, News), and Tools.
- Content Section:**
 - Category:** Add one or more categories (+)
 - Heading:** Building online social commur
 - Introduction:** With EPiServer Relate, buildir
 - Community Tags:** build,relate
 - Forum Room Association:** -1
 - Main Body:** A rich text editor containing an image of a woman and the text: "An Online Community is an excellent way to build strong relationships with your target groups. Companies with strong brands and products that engage the customers and who want to promote and develop relationships with their target groups can derive great benefits from community functionality. EPiServer Relate lets you build unique on-line social communities."

Tagging, Commenting and Rating of Editorial Content

Just as for any community created content, the editorial content created in EPiServer CMS can also be tagged, commented and rated by community members. EPiServer CMS content pages will be counted for in the tag cloud, together with the rest of the content on the website. The commenting function for content pages can be disabled by the editor.

Community Content

Introduction

Community content such as blog entries, forum postings and images, is created by community members from the EPiServer CMS View mode, and stored as items in the community database instead of as EPiServer CMS pages.

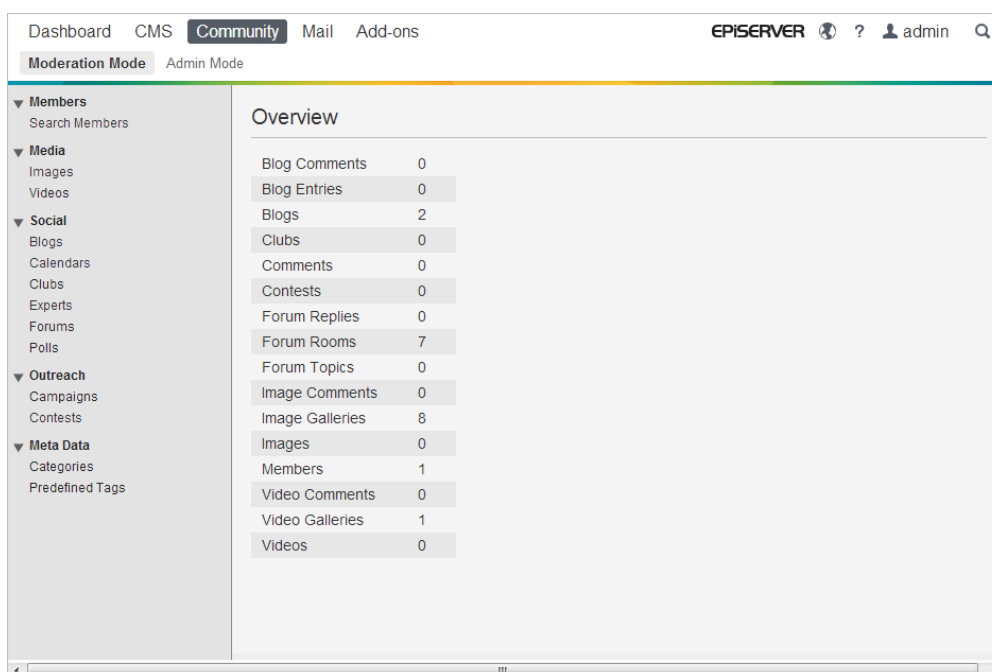
In this sample site, the only community content that is maintained in EPiServer CMS Edit mode is the text and images on the community main pages. Editing of community main pages has been described in earlier sections of this manual. In the following you will find a brief overview of administration tasks in the community.

This means that community content will not be accessible in the EPiServer CMS page tree structure. Instead, community content is administered and moderated from the Community moderation and administration interface. These are available in the top menu in edit mode. Select **Community** and then either **Moderation Mode** or **Admin Mode**.



Community Moderation Mode

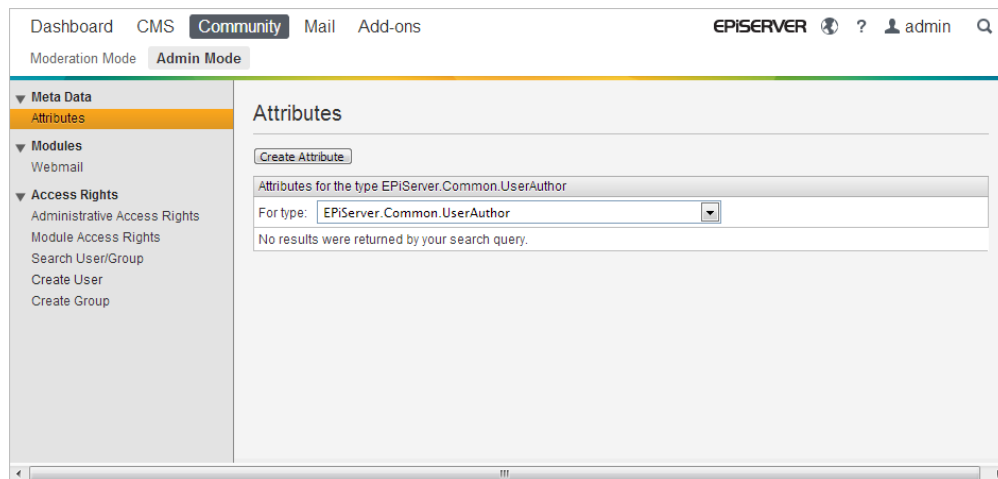
The **Community Moderation Mode** provides access to the Community moderation interface. From here the community moderator can carry out moderation related tasks such as moderation of blog entries and forum postings and image galleries.



Campaigns and contests are managed from here, as well as categories and predefined tags used in the community.

Community Admin Mode

The **Community Admin Mode** is used by the community administrator for administrative tasks such as user and access rights management. This is where the administrator will provide users with access rights to different community functions.



Managing Users and User Groups

Just as in EPiServer CMS, it is possible to work with different sources for managing users and groups in an integrated solution using the Providers technology. In this Relate template example, the Community role and membership provider is used. The EPiServer Relate template example has the following predefined user groups:

- **Administrators** is used for providing editors and moderators access to the EPiServer CMS edit and admin interfaces.
- **CommunityMembers** is used for managing community members.