

Introduction to EPiServer & Site Settings

Last updated: Sept 2022

This guide is an introduction to EPiServer and your site settings. We recommend you read this guide before editing your website.

EPiServer enables you to directly edit your website, create new pages and view the changes as you make them on the page.

If you need further help on the CMS, please check all of our guides available on the [Partner digital hub](#).

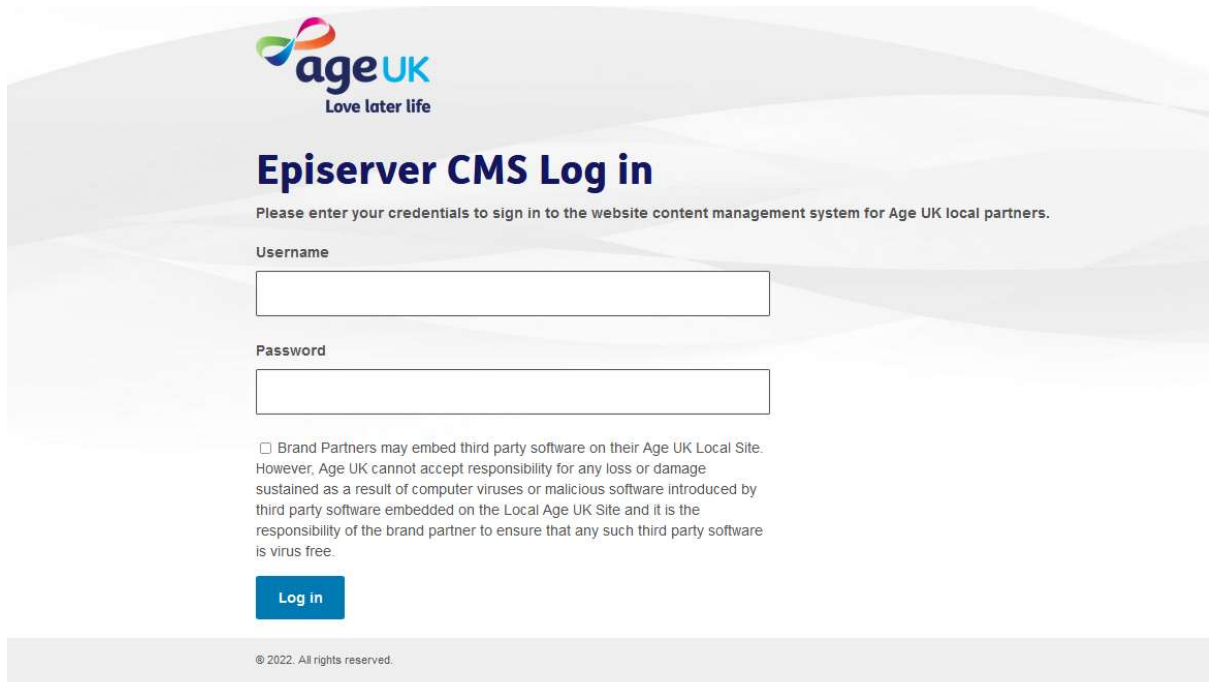
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2. Getting started
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Log-on

Request a username and password, email partner.content@ageuk.org.uk.

Log-on screen:



The screenshot shows the 'Episerver CMS Log in' page. At the top left is the Age UK logo with the tagline 'Love later life'. The main heading is 'Episerver CMS Log in'. Below this is a sub-heading: 'Please enter your credentials to sign in to the website content management system for Age UK local partners.' There are two input fields: 'Username' and 'Password'. Below the password field is a checkbox with the following text: 'Brand Partners may embed third party software on their Age UK Local Site. However, Age UK cannot accept responsibility for any loss or damage sustained as a result of computer viruses or malicious software introduced by third party software embedded on the Local Age UK Site and it is the responsibility of the brand partner to ensure that any such third party software is virus free.' Below the checkbox is a blue 'Log in' button. At the bottom of the page, there is a small copyright notice: '© 2022. All rights reserved.'

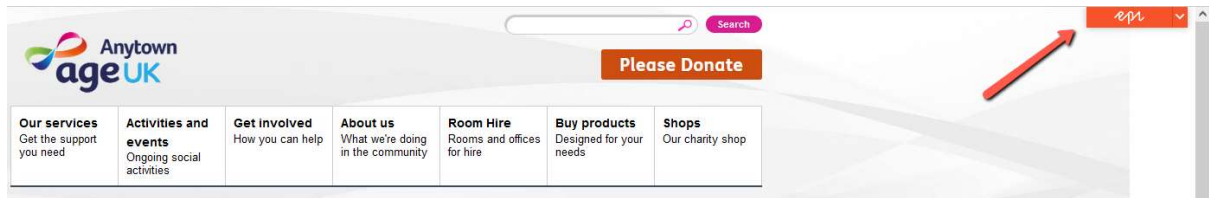
When you log on you will need to tick the box to confirm you understand the risks regards third party embeds.

“Brand Partners may embed third party software on their Age UK Local Site. However, Age UK cannot accept responsibility for any loss or damage sustained as a result of computer viruses or malicious software introduced by third party software embedded on the Local Age UK Site and it is the responsibility of the brand partner to ensure that any such third party software is virus free.”

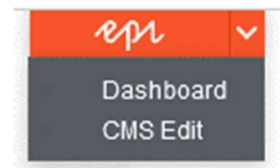
Getting started

Once logged in you will see either:

An orange button in the top right corner of your website,



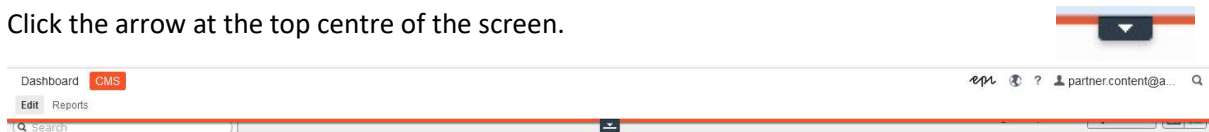
Click it and select CMS Edit



Or an orange line at the top of the screen.



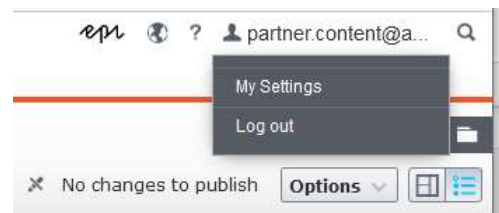
Click the arrow at the top centre of the screen.



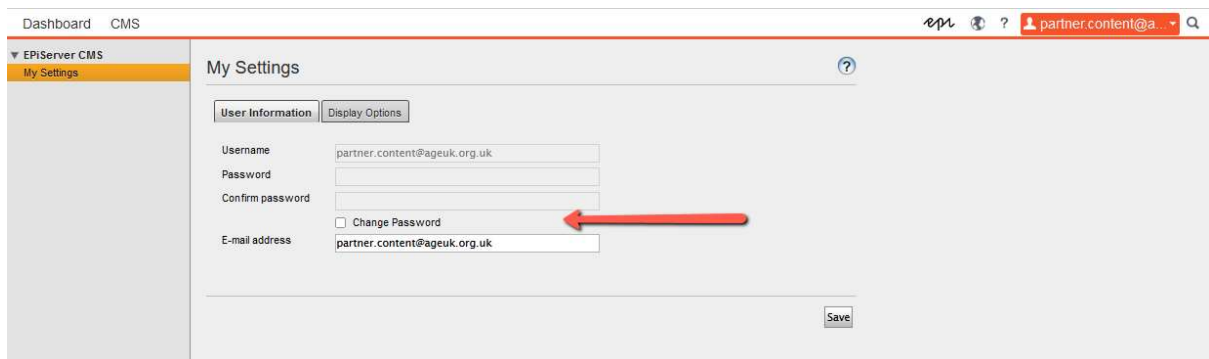
It will change to this icon, click again to lock in place



In this view you can click on your name in the top right corner to adjust your settings or log out.



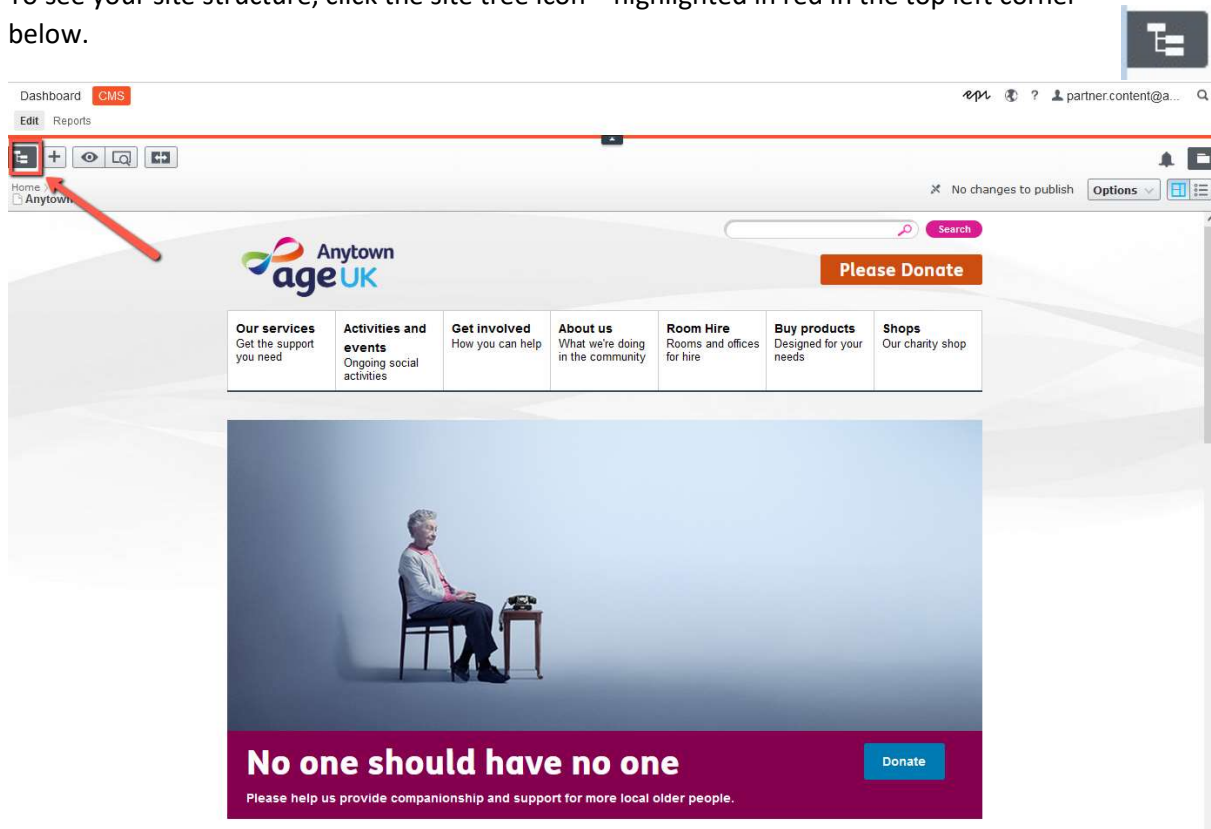
In settings you can change your password if required



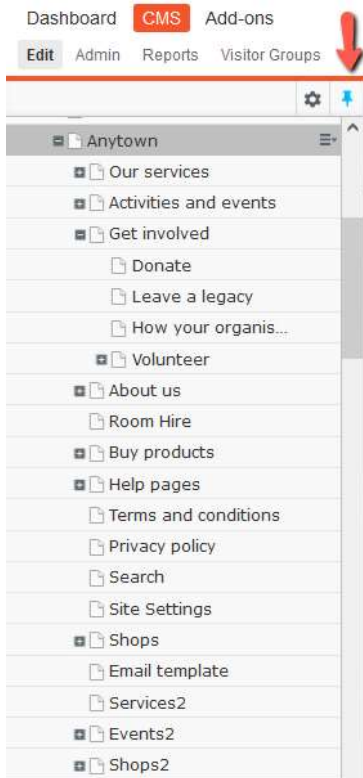
The EPiServer Interface


Site Structure


To see your site structure, click the site tree icon – highlighted in red in the top left corner below.



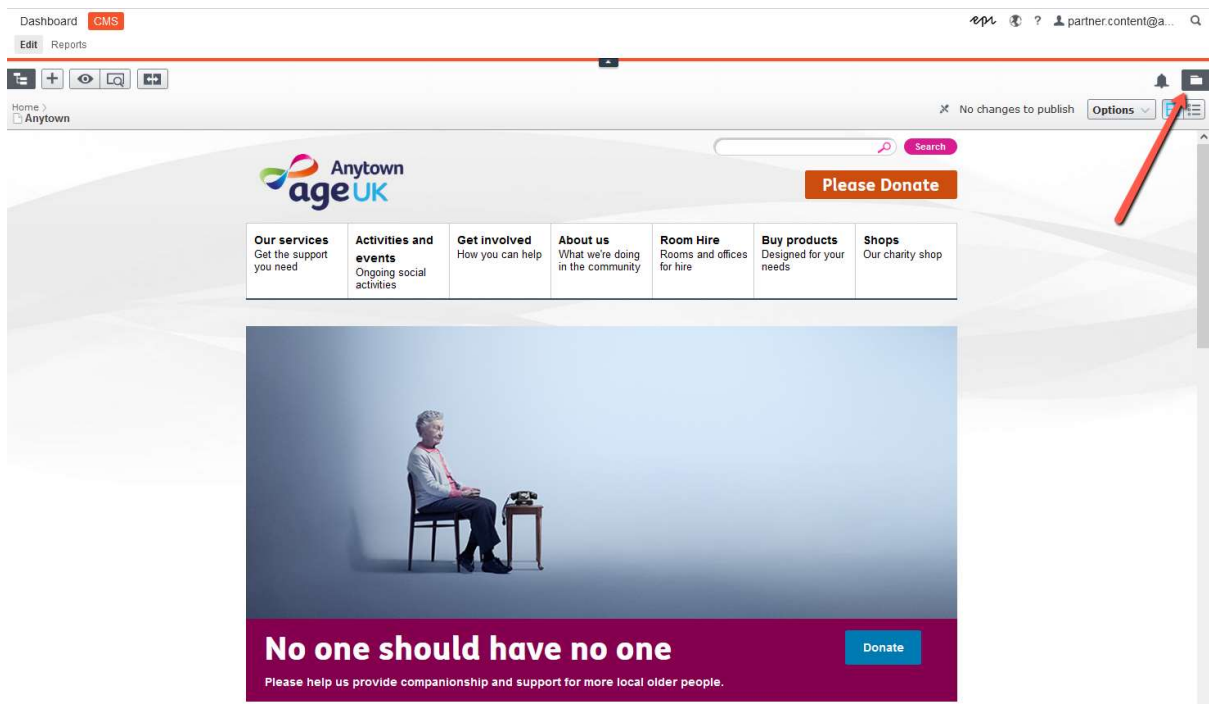
You will see a window on the left with your site structure.



If you click away the left hand pane disappears, click on  to get it back.

Clicking the  icon will pin the window to your screen so that it stays in place.

Blocks, Media and forms folders

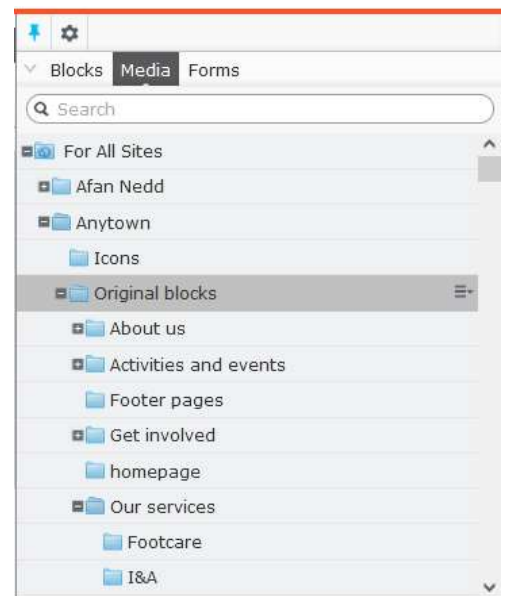


On the top right-hand there is a folder icon.

Clicking on this shows your folders for blocks, media, and forms.



Click the pin icon to make the window stay in place.



These are the folders you can create and store content types

Blocks

These create different types of content layout on a page, such as: text, Images, featured post blocks, Accordions etc.

Media

These are Images (GIF, JPEG, PNG), and documents such as Microsoft Word, Excel, PowerPoint, PDF

Forms

These are EPiServer forms that can be set up to collect basic data from users.

How content works in EPiServer

With EPiServer you create pages and then populate them using “blocks”. You choose a block depending on what type of content you wish to create.

For example, if you want to put some text on the page, you would choose a text block. If you wanted to add 3 featured posts, you would choose a 3 featured posts block. To find out more about blocks, see our guides:

[Using blocks and creating content](#)

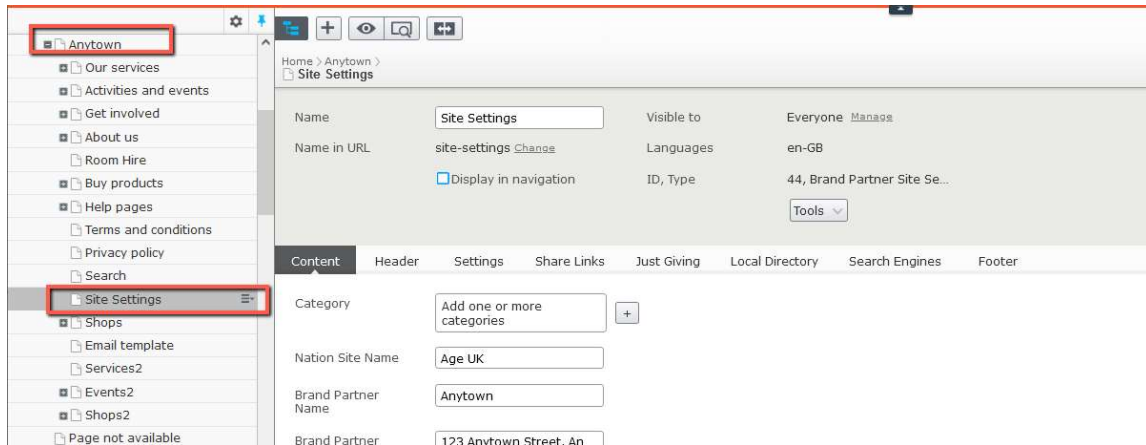
[Instructions for each block type](#)

Please note: It’s important not to add any code to the CMS, for example to change font or background colours. This is because your code won’t be supported by any updates we make to the CMS templates in the future and this could cause problems on your site. In addition, we have built the new CMS to be consistent with the Age UK brand guidelines and house style.

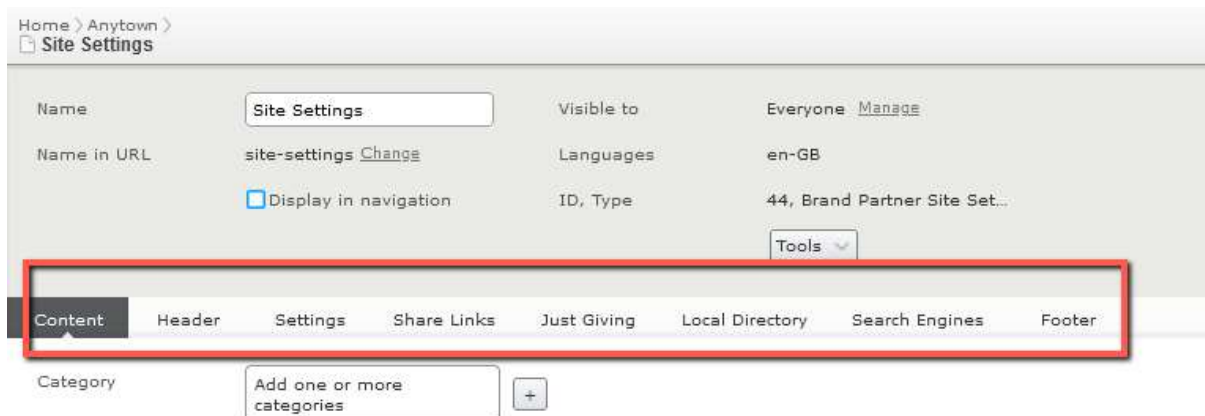
You can find all guides on the [Partner Digital Hub](#).

Site settings

Under your homepage in the site tree is your site settings page. It is not viewable to your users. **DO NOT DELETE THIS PAGE.**



You will see the properties of the page with a number of tabs, ringed in red below.



Under these tabs you will be able to control, edit or add things such as:

The **donation button link**

Your **sharing links** (e.g. Facebook and Twitter)

The **phone number** which will appear in your social links block on your homepage

Enabling your **cookie banner alert** (this is not a cookie compliance panel)

Add a footer **cookie link**

Inhibit your **tracking cookies from firing**

Some of the fields under the *Site Settings* page will not be available for you to edit.

If you need to make amendments that are not accessible to you, please contact partner.content@ageuk.org.uk.

Content

Contact details

This is where partners can change the Contact details of their organisation.

The screenshot shows the 'Site Settings' interface. At the top, there are fields for 'Name' (Site Settings), 'Visible to' (Everyone), 'Name in URL' (site-settings), 'Languages' (en-GB), and 'ID, Type' (23869, Brand Partner Site...). Below these is a 'Tools' dropdown menu. A navigation bar contains 'Content', 'Header', 'Settings', 'Share Links', 'Just Giving', 'Local Directory', 'Search Engines', and 'Footer'. The 'Content' tab is selected and highlighted with a red box. Underneath, there are several form fields: 'Category' (Add one or more categories), 'Nation Site Name' (empty), 'Brand Partner Name' (Test BP), 'Brand Partner Address' (Tavis House), 'Brand Partner Telephone' (01234567890), 'The 'Email This Page' page' (empty), 'The 'Search Results Page' page' (Search), and 'The 'Search Media Folder' media content folder' (Test BP).

It will appear at the bottom of all the Partner website pages

The screenshot shows the footer of a website. It contains a list of links: 'Accessibility', 'Contact us', 'Privacy policy', and 'Terms and Conditions'. Below the links is a link to 'Visit the national Age UK website'. The main text in the footer reads: 'This website is managed by Age UK Anytown working in partnership with Age UK Anytown, 123 Anytown Street, Anywhere.' This text is highlighted with a red box. At the bottom, there is a line of small text: 'Registered charity number xxxxxxx. Company number 111222. VAT registration number 3334445. © Age UK Anytown 2022. All rights reserved.'

Header

Site Settings

Name	<input type="text" value="Site Settings"/>	Visible to	Everyone
Name in URL	site-settings Change	Languages	en-GB
<input type="checkbox"/> Display in navigation		ID, Type	23869, Brand Partner Site ...
<input type="button" value="Tools"/>			

Content **Header** Settings Share Links Just Giving Local Directory Search Engines Footer

Is Language Selector Enabled

Brand Partner Logo

Contact Us Page ...

Donation Form Page

Donate Button Url ...

Enable Cookie Banner

Cookie Banner Text

Cookie Banner Link Text

Cookie Banner Link ...

Open In

Cookie Banner Button Text

Contact us



The contact us link on your homepage can be added and edited in the contact us page field. Click on the dots to edit

Contact Us Page ...

Donate button URL



The Donate Button URL relates to the destination of the Donate button on the top right hand corner of your site. You can link to your donations page but you can also link to an external donations platform, also there is a [Just giving functionality](#) if you use Just Giving.

Donate Button Url ...

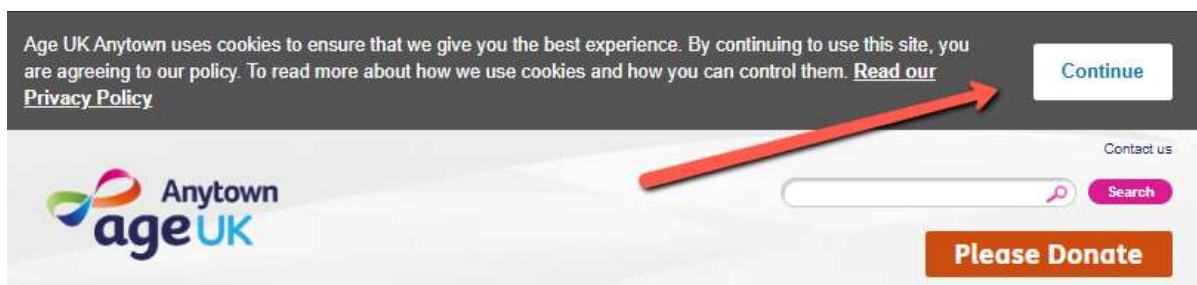
To change the destination click on the three dots next to Donate Button URL.

You can then enter in online fundraising platform URL under External Link

A screenshot of a 'Create link' dialog box. It has a title bar with 'Create link' and a close button. The dialog contains several options: 'Language' with a dropdown menu set to 'Automatic (default)'; 'Page', 'Media', and 'E-mail' each with a text input field and a three-dot menu icon; and 'External link' with a text input field. A red border and a red exclamation mark icon are visible on the 'External link' input field, with a tooltip that says 'This value is required.' at the bottom. At the bottom of the dialog are three buttons: 'OK', 'Delete', and 'Cancel'.

Cookie Alert

In EPiServer, you can now add a banner to your website. This can be used as cookie information, but this is NOT a GDPR/ PECR compliance tool.



Enable Cookie Banner

Cookie Banner Text:

Cookie Banner Link Text:

Cookie Banner Link:

Open In:

Cookie Banner Button Text:

Once on this tab, you can click the Enable Cookie Banner in order to add it to your site

The Cookie Banner Text will need to be filled in, in order to fill out the banner. We recommend the following example:

Age UK INSERT NAME HERE uses cookies to ensure that we give you the best experience. By continuing to use this site, you are agreeing to our policy. To read more about how we use cookies and how you can control them.

The Cookie Banner Link Text will label the link to your Privacy Policy. We recommend it reading – “Read our Privacy Policy”

The Cookie Banner Link should link to your Privacy Policy

The Cookie Banner Button Text should read Continue

Once complete, click Publish.

The Cookie Banner header will then appear on the top of your site.

Settings

Home > Test BP >
Site Settings

Name	Site Settings	Visible to	Everyone
Name in URL	site-settings Change	Languages	en-GB
<input type="checkbox"/> Display in navigation		ID, Type	23869, Brand Partner Site...
			Tools

Content Header **Settings** Share Links Just Giving Local Directory Search Engines Footer

Published ✕ 5/4/17, 11:11 AM

Created ✕ 5/4/17, 11:11 AM

Modified ✕ 5/4/17, 11:11 AM

Update modified date ✕

Sort subpages ✕ According to creation date (latest first) ▾

Sort index ✕ 1,200

Shortcut ✕ No shortcut

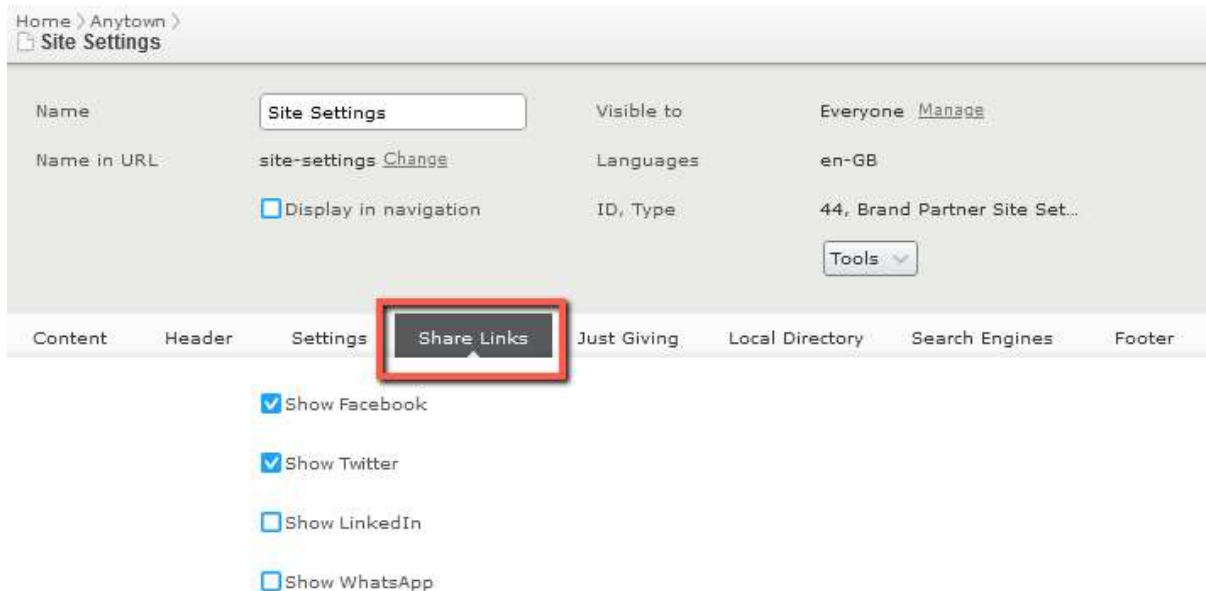
Settings is admin only and partners cannot make any changes on this tab

Share Links

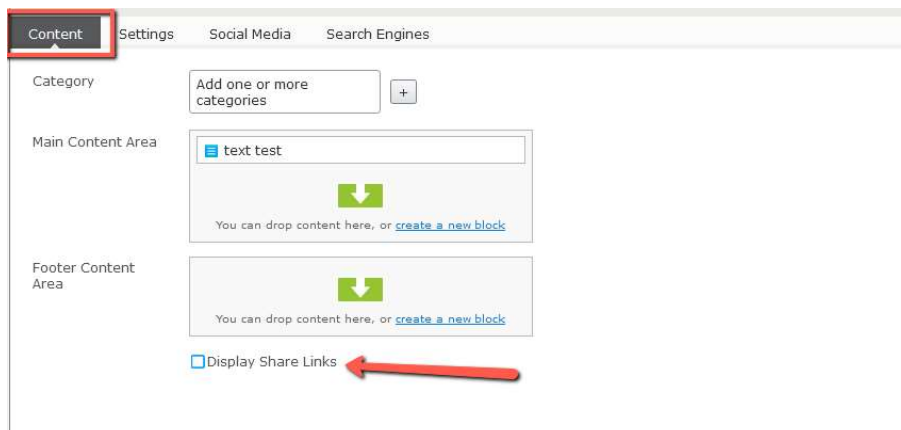
Under Share Links, you can select how users are able to share your page content on social media.

Firstly, you will need to create the actual links by editing the **social links block** on your homepage

These are then pulled into display on other pages on your site based on the selections you make here. To select or deselect an option, simply tick or untick the options.



Then on the specific content page you are working on, select Display Share Links



These links icons will then display on the bottom corner of each page that you turn them on.

Currently these will not appear on portal driven pages

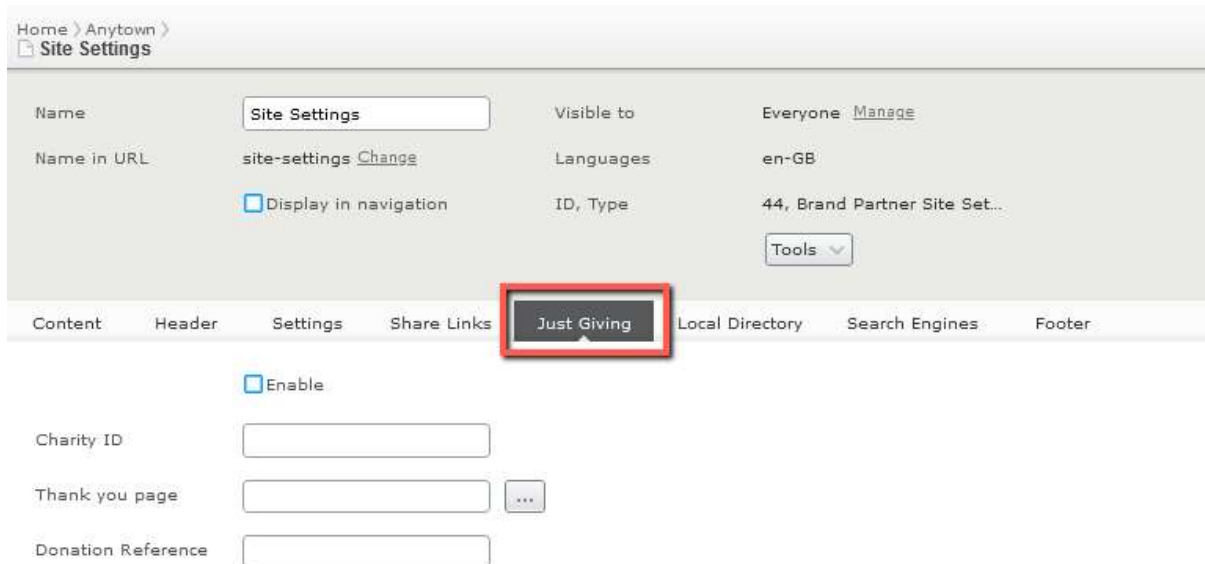
- > Community car scheme
- > Country Connect service
- > Day trips out
- > Volunteer on our minibus



Just Giving Integration

These fields are tied to the Just Giving platform functionality. These will allow user to donate via Just Giving but will then return users to the specific local Age UK that they started from after donation is complete.

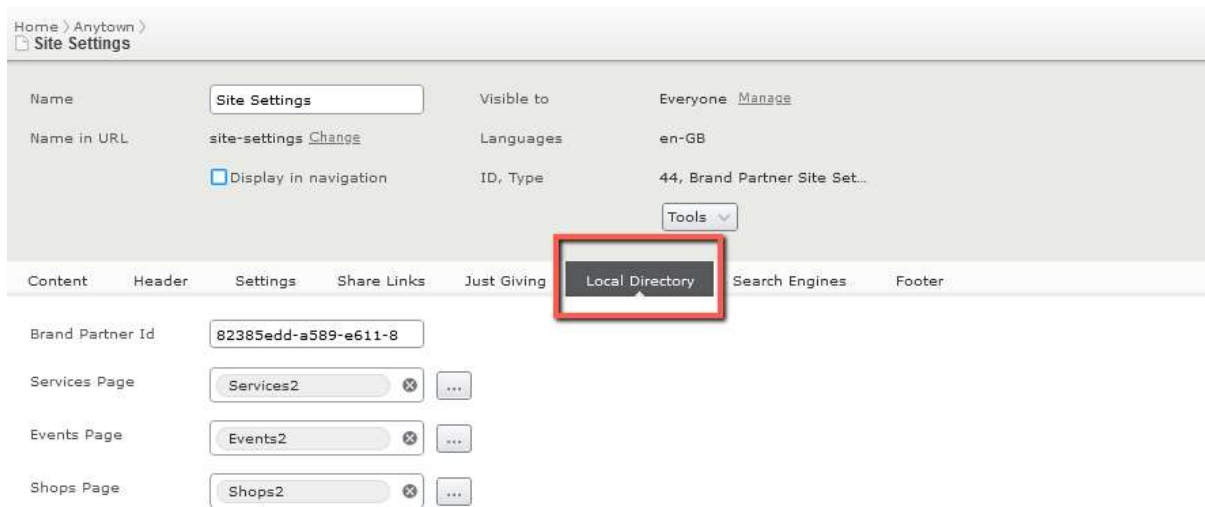
For Just giving functionality please see the [specific guidance](#)



The screenshot shows a 'Site Settings' page for 'Anytown'. The 'Just Giving' tab is highlighted with a red box. Below the navigation tabs, there are several settings:

- Enable
- Charity ID:
- Thank you page: ...
- Donation Reference:

Local directory portal settings



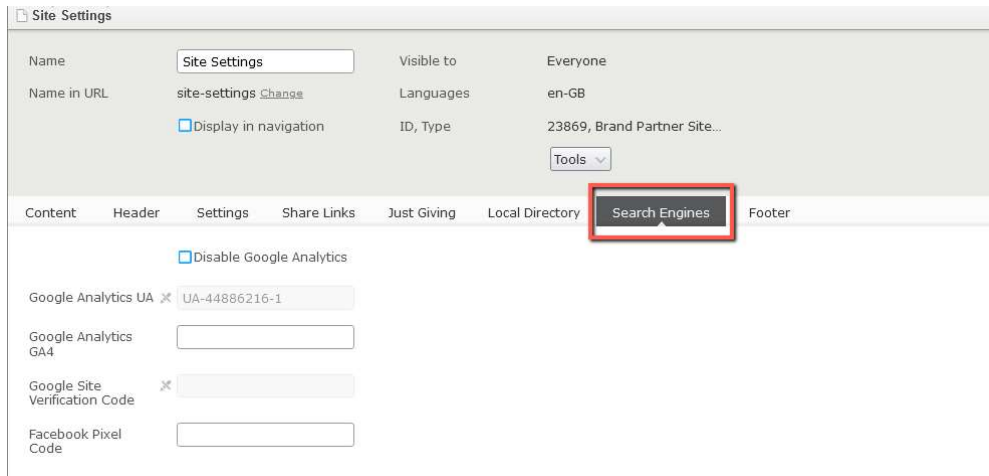
The screenshot shows the 'Site Settings' page for 'Anytown'. The page has a breadcrumb trail 'Home > Anytown > Site Settings'. The main content area is divided into two columns. The left column contains 'Name' (Site Settings), 'Name in URL' (site-settings), and a checkbox for 'Display in navigation'. The right column contains 'Visible to' (Everyone), 'Languages' (en-GB), and 'ID, Type' (44, Brand Partner Site Set...). A 'Tools' dropdown menu is visible below the ID field. Below the main content area is a navigation bar with tabs: 'Content', 'Header', 'Settings', 'Share Links', 'Just Giving', 'Local Directory' (highlighted with a red box), 'Search Engines', and 'Footer'. Below the navigation bar, there are several input fields: 'Brand Partner Id' (82385edd-a589-e611-8), 'Services Page' (Services2), 'Events Page' (Events2), and 'Shops Page' (Shops2). Each of these fields has a delete icon (X) and a more options icon (three dots).

This section relates to your portal driven pages. You should not delete these page links or change the Brand Partner ID as these pull through the data of your services from the partner portal

You can find out more about the [partner portal on the digital hub](#)

Search Engine Settings & Google Analytics

This section relates to your website analytics IDs



The screenshot shows the 'Site Settings' interface. At the top, there are fields for Name (Site Settings), Visible to (Everyone), Name in URL (site-settings), Languages (en-GB), and ID, Type (23869, Brand Partner Site...). Below these is a 'Tools' dropdown menu. A navigation bar contains tabs for Content, Header, Settings, Share Links, Just Giving, Local Directory, Search Engines (highlighted with a red box), and Footer. Under the Search Engines tab, there is a checkbox for 'Disable Google Analytics' which is currently unchecked. Below this are input fields for Google Analytics UA (with a value of UA-44886216-1), Google Analytics GA4, Google Site Verification Code, and Facebook Pixel Code.

Disable Google Analytics

Whilst Age UK develops a network wide cookie compliance banner to allow end users to opt in or out of first and third party cookies, We have added a functionality to Disable google analytics.

This will prevent Age UK National Google Analytics tags from firing. Preventing these tags from firing means sessions to your site are no longer counted in Age UK analytics, and we can't provide data on site usage. It will also prevent the Age UK National Google Analytics cookies from being set on your site.

If your organisation has concerns regards the use of first party tracking cookies on your site, you can use this functionality to stop them firing. However, any third-party cookies will only have been added by the local sites, such as social feed embeds or marketing tracking. So you should check the GDPR/PECR guidance and remove them in order to remain compliant.

Google Analytics UA ID

This section is where your partner google analytics code can be seen (but not changed) for reference. To access your google analytics, contact partner.content@ageuk.org.uk

Google Analytics UA ID is being retired from July 2023
<https://support.google.com/analytics/answer/11583528>

Google Analytics GA4 ID

We recommend that you prepare to use Google Analytics 4 going forward. You can enter your GA4 ID here. You can find out more about GA4 here
<https://support.google.com/analytics/answer/10089681>

Google Site Verification Code

Currently partners do not have access to the site verification code
<https://support.google.com/webmasters/answer/9008080?hl=en>

Facebook Pixel Code

This is used for marketing purposes using Facebook pixel: refer to Disable Google Analytics above.

Enabling your footer Links

On the footer settings, the footer tab items are mostly locked. However, If you want a specific footer item for *cookies* and *Complaints procedures* you can add these in here.

The screenshot displays the CMS interface for footer settings. At the top, a navigation menu includes 'Accessibility', 'Contact us', 'Privacy policy', 'Terms and Conditions', 'Cookies', and 'Complains Procedure'. Red arrows point to 'Cookies' and 'Complains Procedure'. Below the menu, a link says '> Visit the national Age UK website'. A paragraph states: 'This website is managed by Age UK Milton Keynes working in partnership with Age UK. Age UK Milton Keynes, The Peartree Centre, 1 Chadds Lane, Peartree Bridge, Milton Keynes MK8 3EB.' Another line reads: 'Registered charity number 1078773. Company number 3887291. VAT registration number 408 6848 22. © Age UK Milton Keynes 2022. All rights reserved.'

The 'Site Settings' section includes:

Name	Site Settings	Visible to	Everyone
Name in URL	site-settings Change	Languages	en-GB
<input type="checkbox"/> Display in navigation		ID, Type	23869, Brand Partner Site...

A 'Tools' dropdown menu is visible. The 'Footer' tab is selected and highlighted with a red box. The footer settings list includes:

- Accessibility Help Page: Help with accessi...
- Contact Us Page: Contact us
- Privacy Policy Page: Privacy policy
- Terms And Conditions Page: Terms and conditi...
- Cookie Policy Page: Cookies policy [X] ... (red arrow)
- Complaints Procedure Page Link: ... (red arrow)
- Complaints Procedure Page Link Text: (red arrow)
- Charity Number: 123456 [X]
- Company Number: 234567 [X]
- VAT Registration Number: 345678 [X]
- Visit Us Link: [X]
- Visit Us Text: [X]

As you do not have the access to add a page at root level, you should [create a content page](#) under the privacy policy page called 'Cookie Policy' if you use the 'Complaints Procedure' link this page can sit wherever you think best. You can then link to this page and it will appear in the footer of the site. If you do not add the page link then that link will not appear footer.

[Guidance on cookies can be found on the digital hub](#)

There are more guides and training videos available on the [Partner digital hub](#).

If the answers you need are not in the guides or videos, then please contact partner.content@ageuk.org.uk

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