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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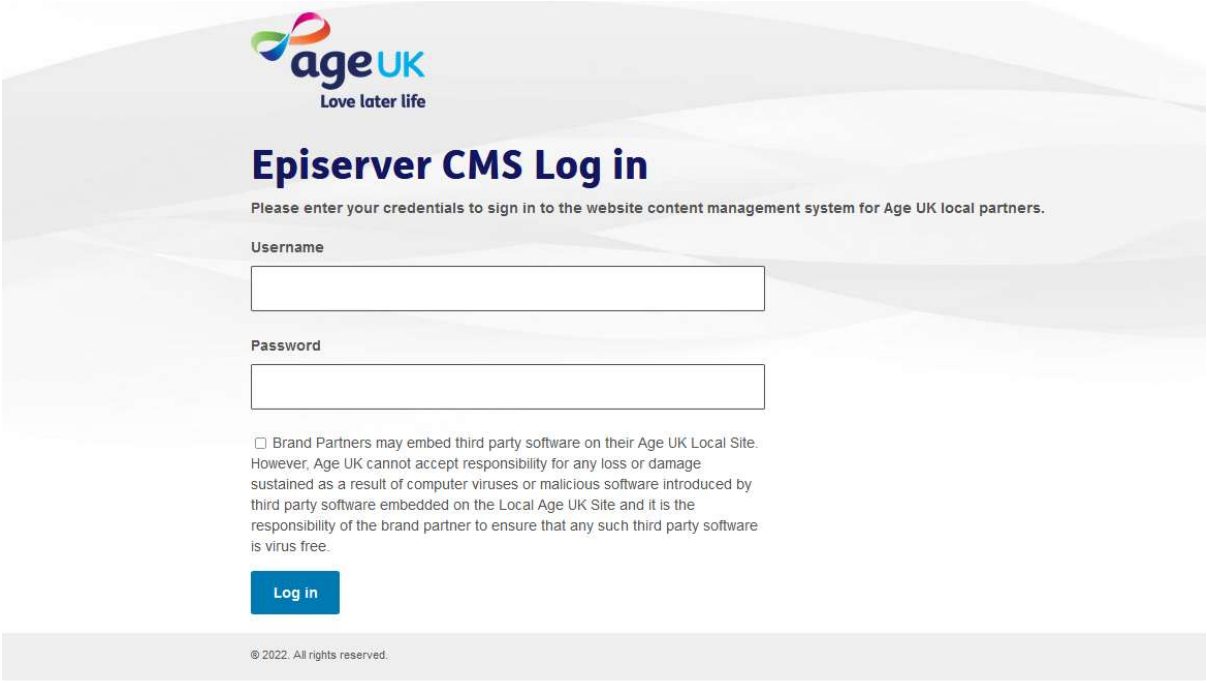
Log-on

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

Log-on screen:



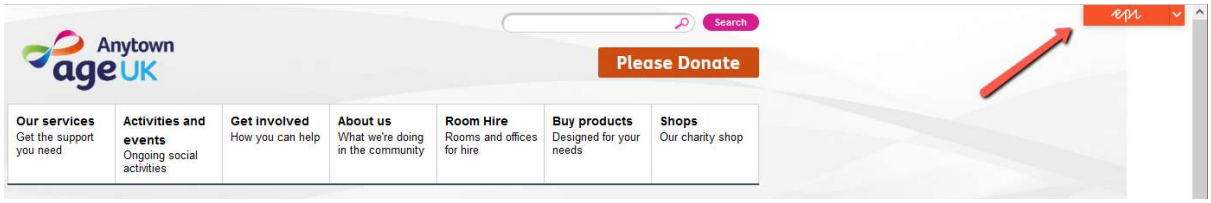
When you log on you will need to tick the box to confirm you understand the risks regards third party embeds.

"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."

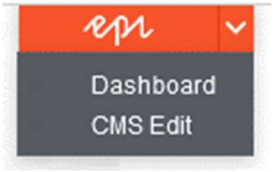
Getting started

Once logged in you will see either:

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



Click it and select CMS Edit

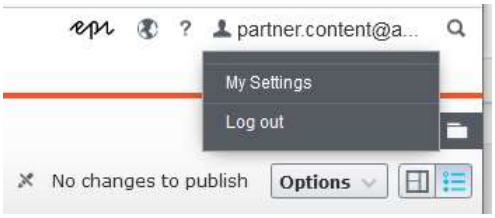


Or an orange line at the top of the screen.

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.

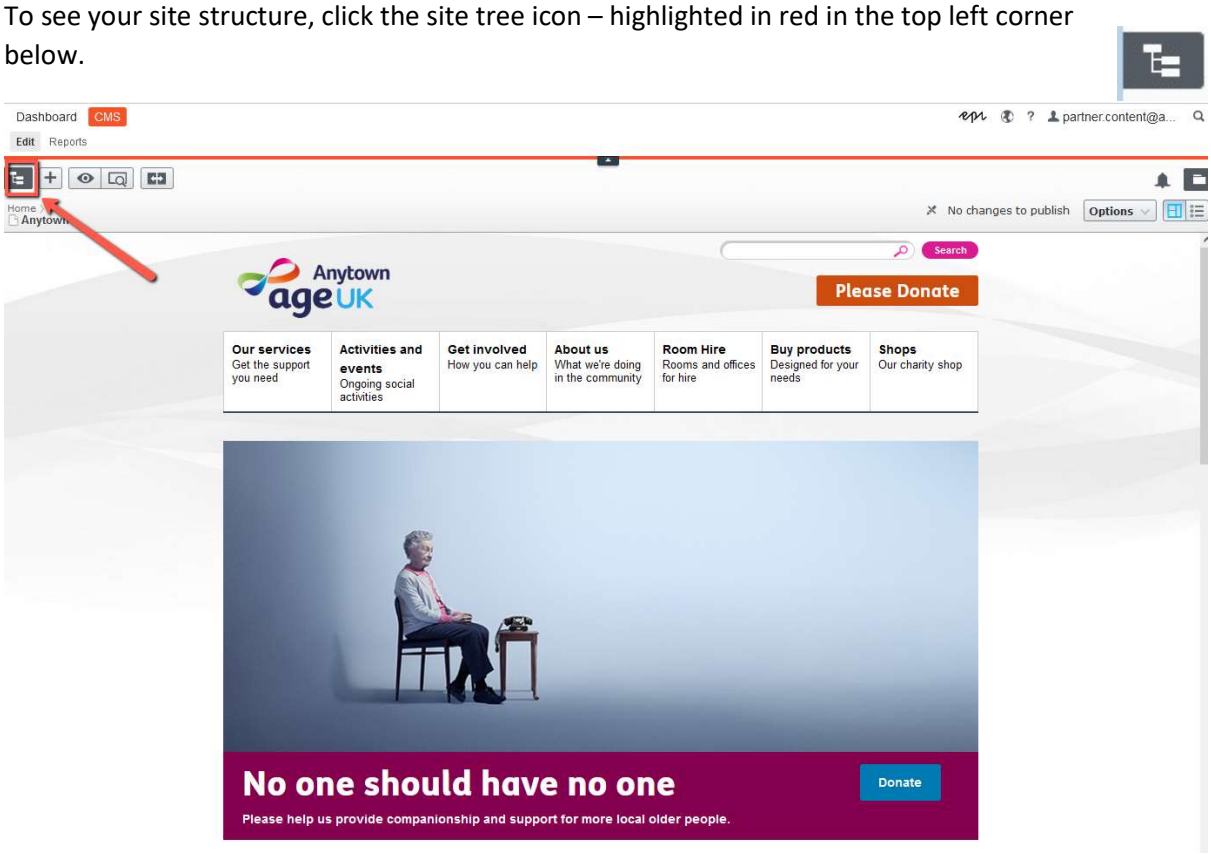


In settings you can change your password if required

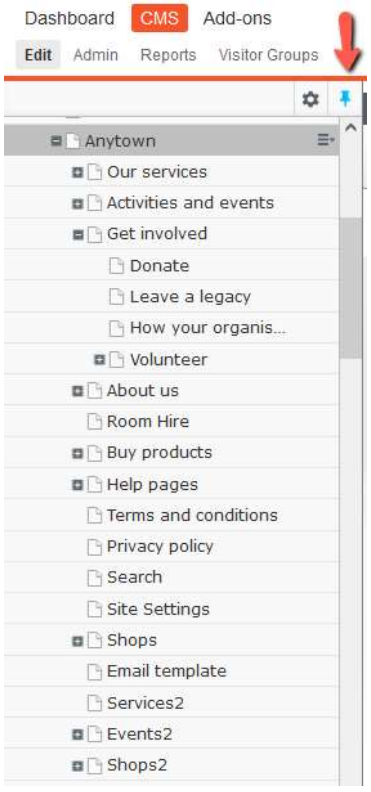
The EPiServer Interface

Site Structure

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



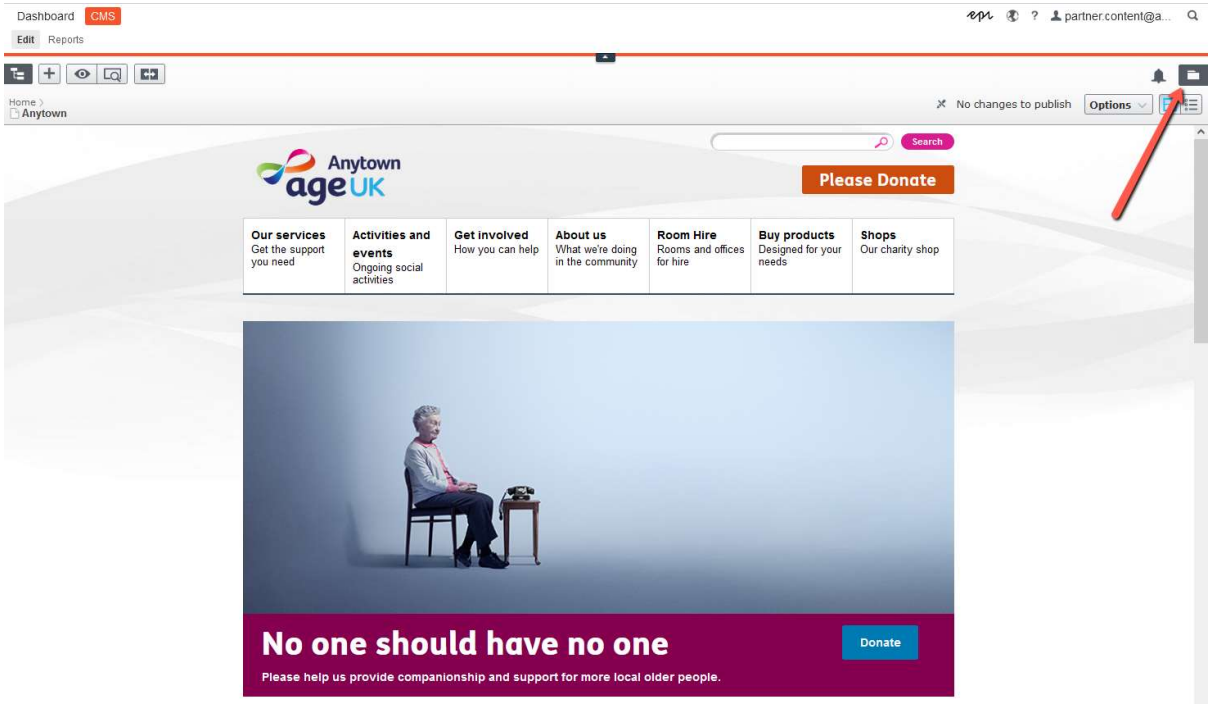
You will see a window on the left with your site structure.



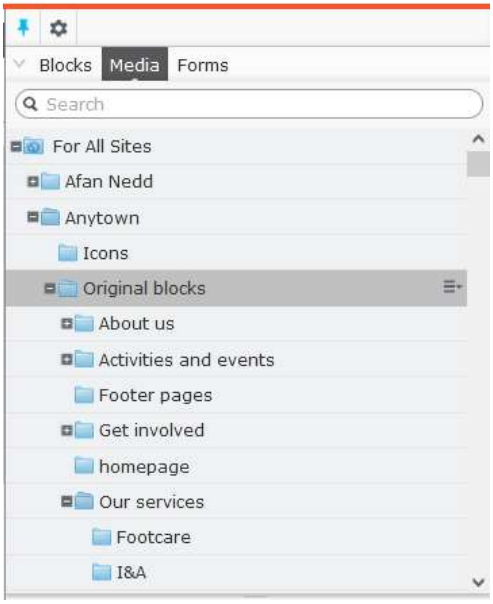
If you click away the left hand pane disappears, click on to get it back.

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

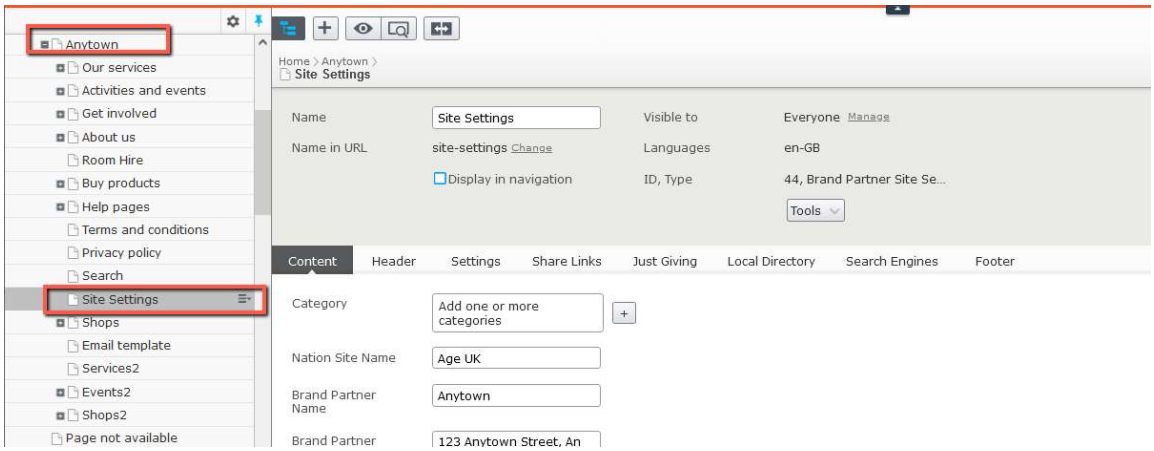
Instructions for each block type

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.

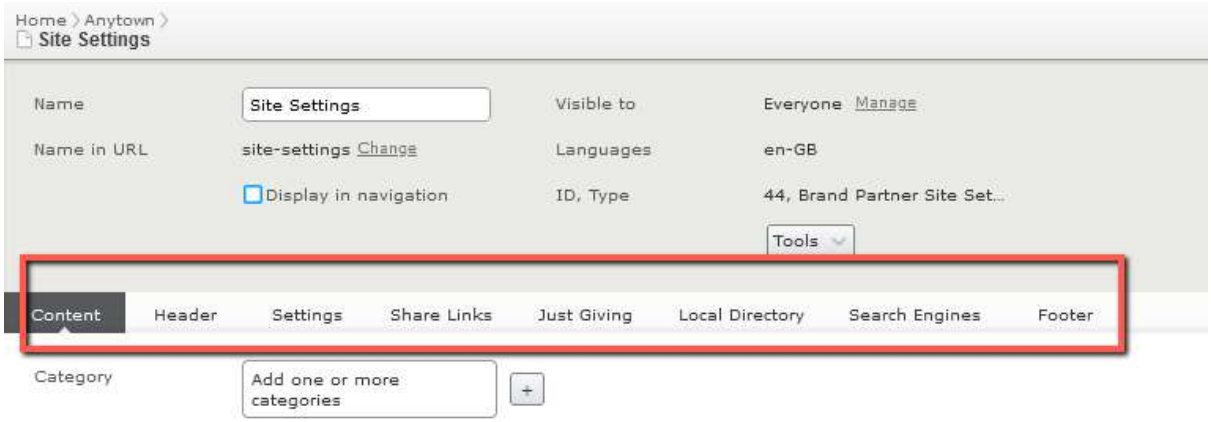
You can find all guides on the Partner Digital Hub.

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

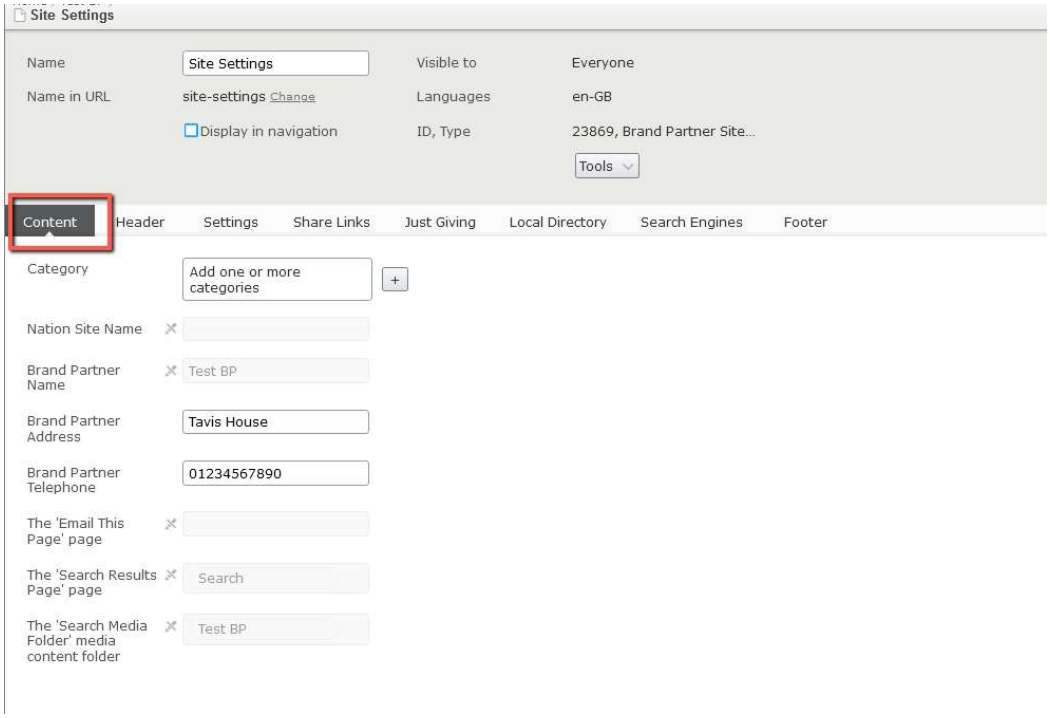
Some of the fields under the *Site Settings* page will not be available for you to edit.

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

Content

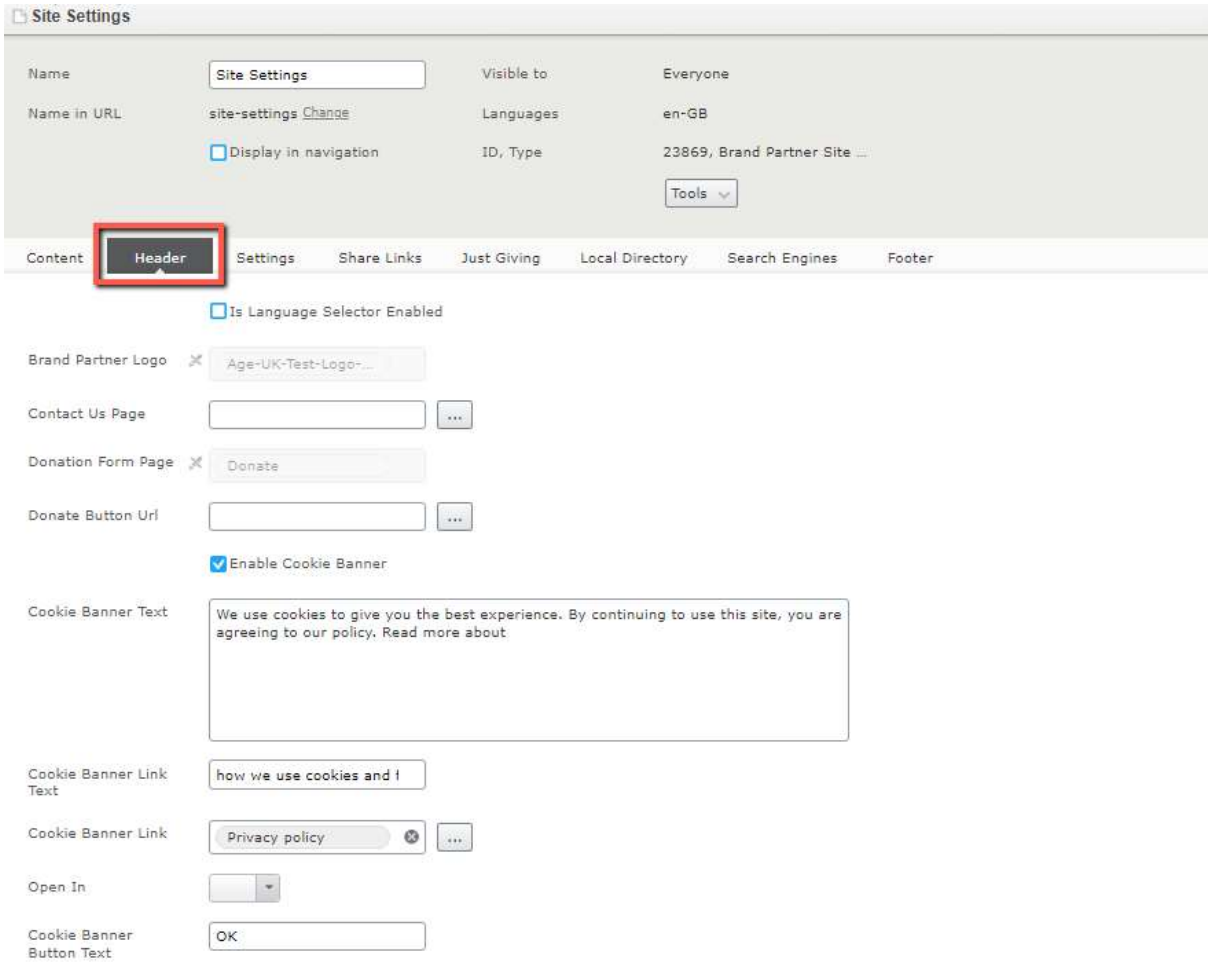
Contact details

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

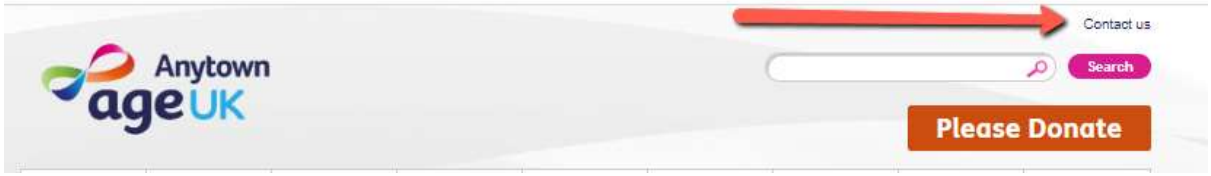


It will appear at the bottom of all the Partner website pages

Header



Contact us



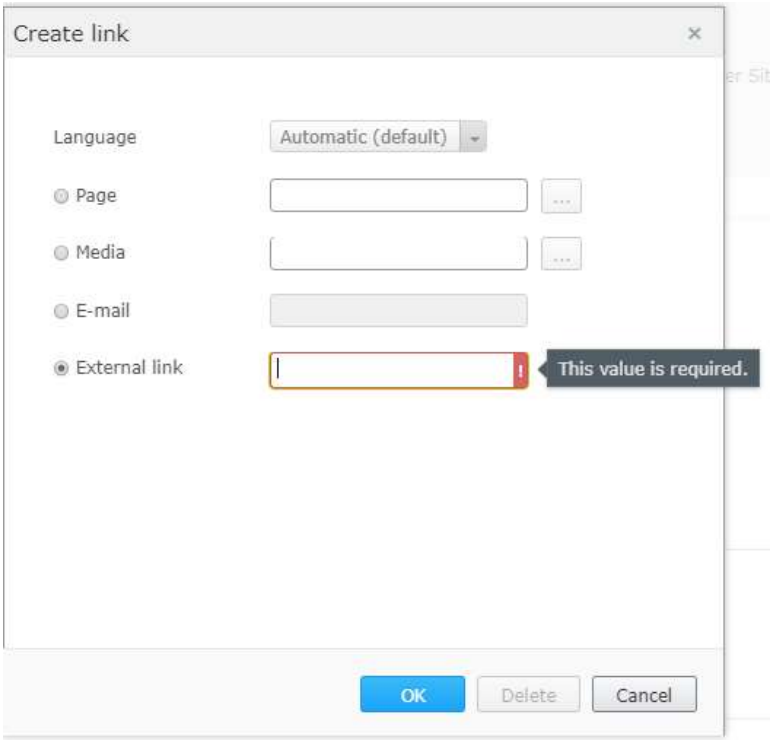
The contact us link on your homepage can be added and edited in the contact us page field. Click on the dots to edit

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.

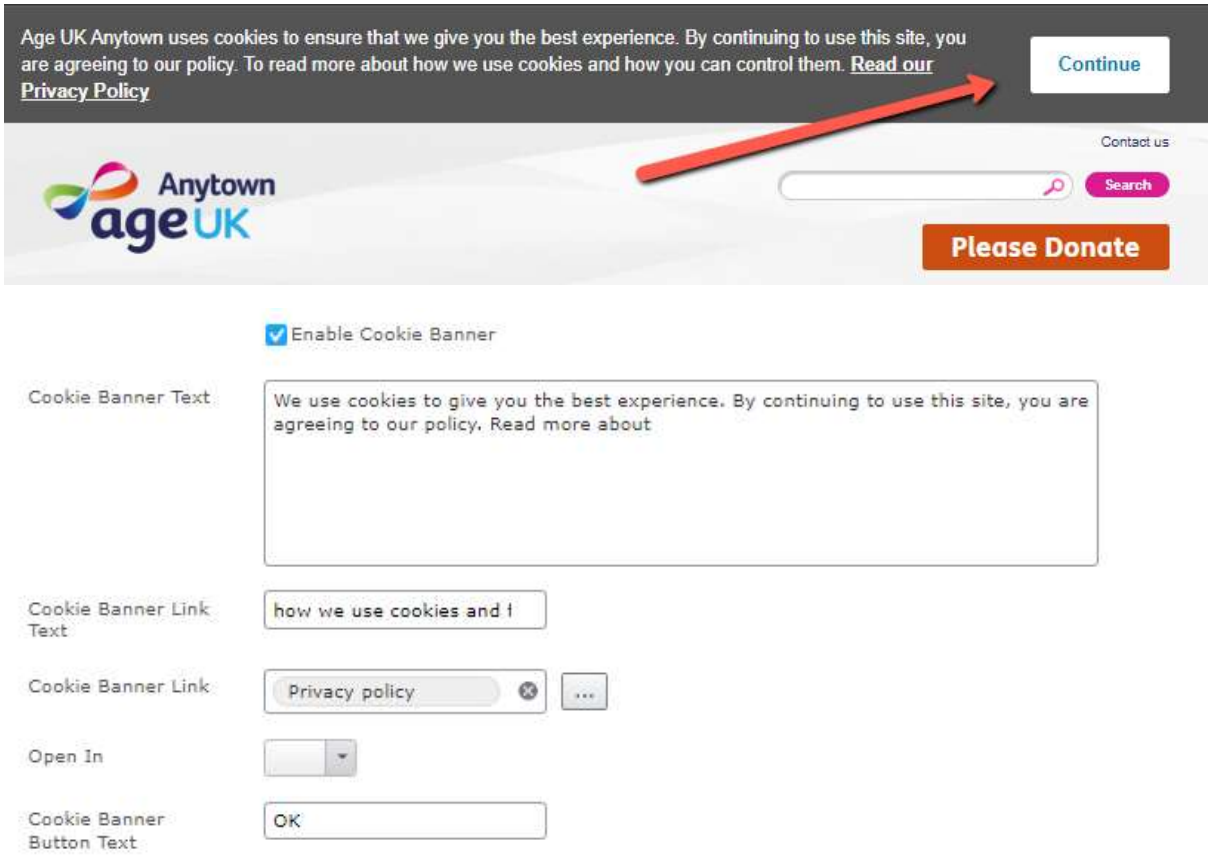
To change the destination click on the three dots next to Donate Button URL.

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



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.



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”

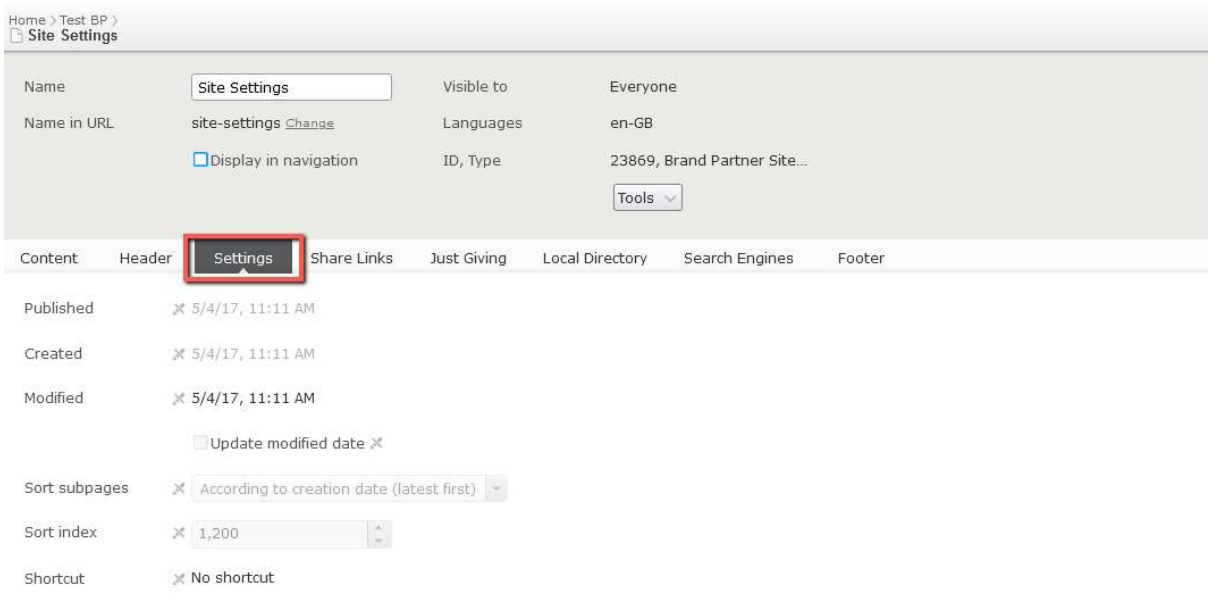
The Cookie Banner Link should link to your Privacy Policy

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



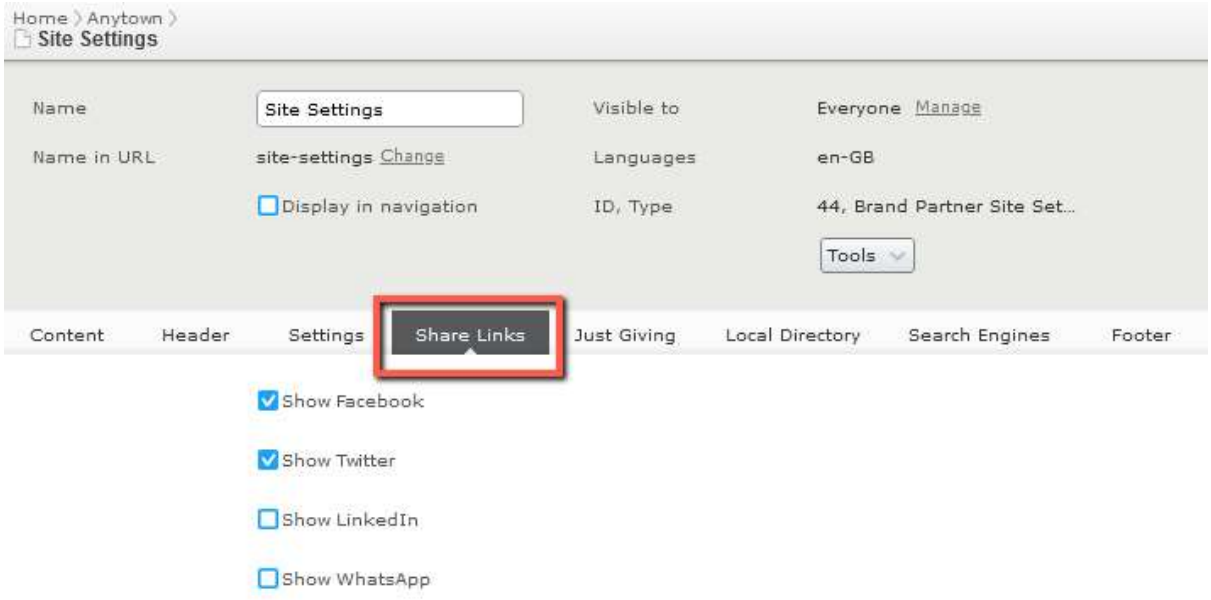
Settings is admin only and partners cannot make any changes on this tab

Share Links

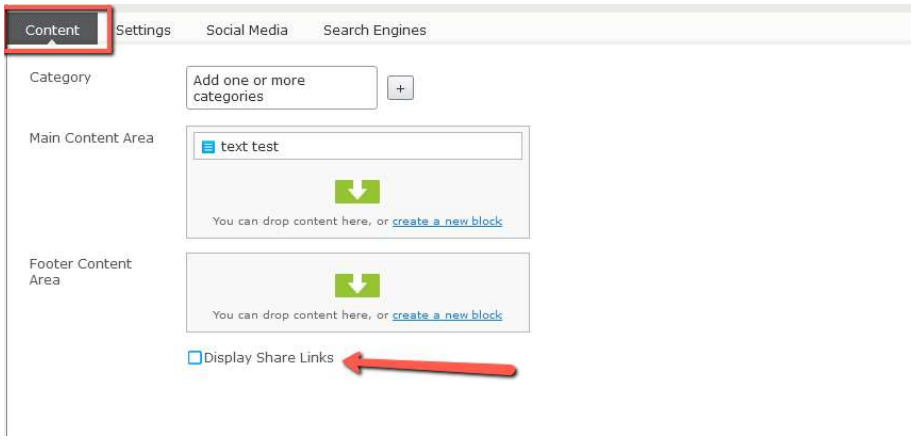
Under Share Links, you can select how users are able to share your page content on social media.

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

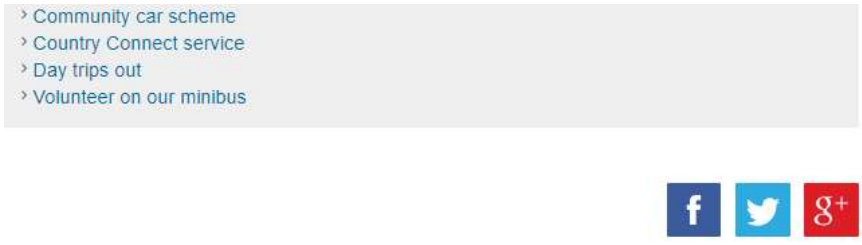
These are then pulled into display on other pages on your site based on the selections you make here. To select or deselect an option, simply tick or untick the options.



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



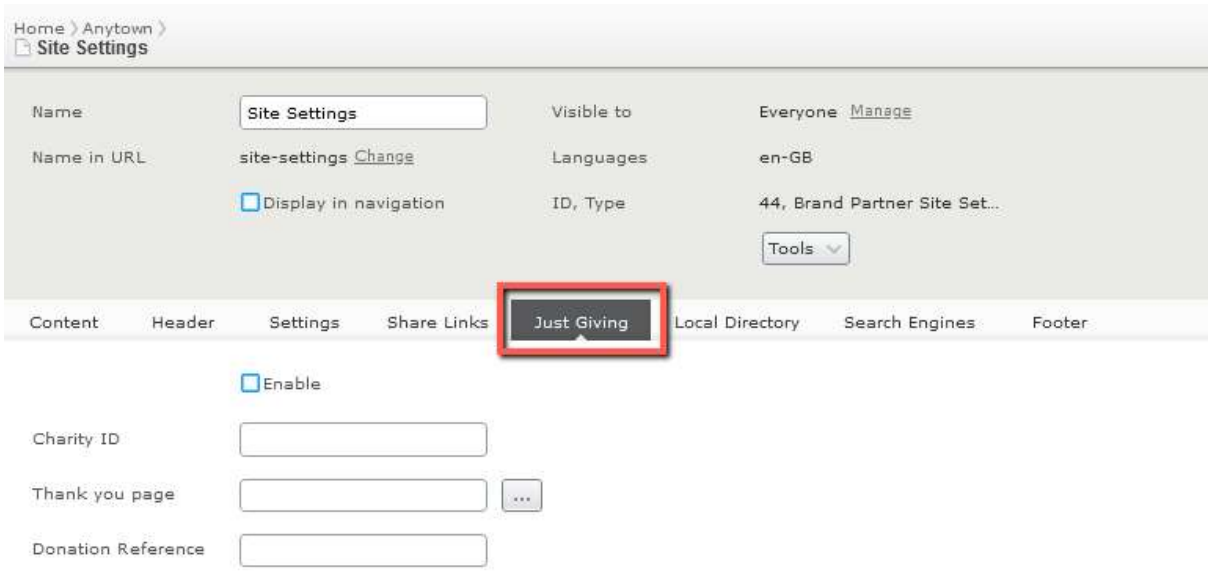
These links icons will then display on the bottom corner of each page that you turn them on. Currently these will not appear on portal driven pages



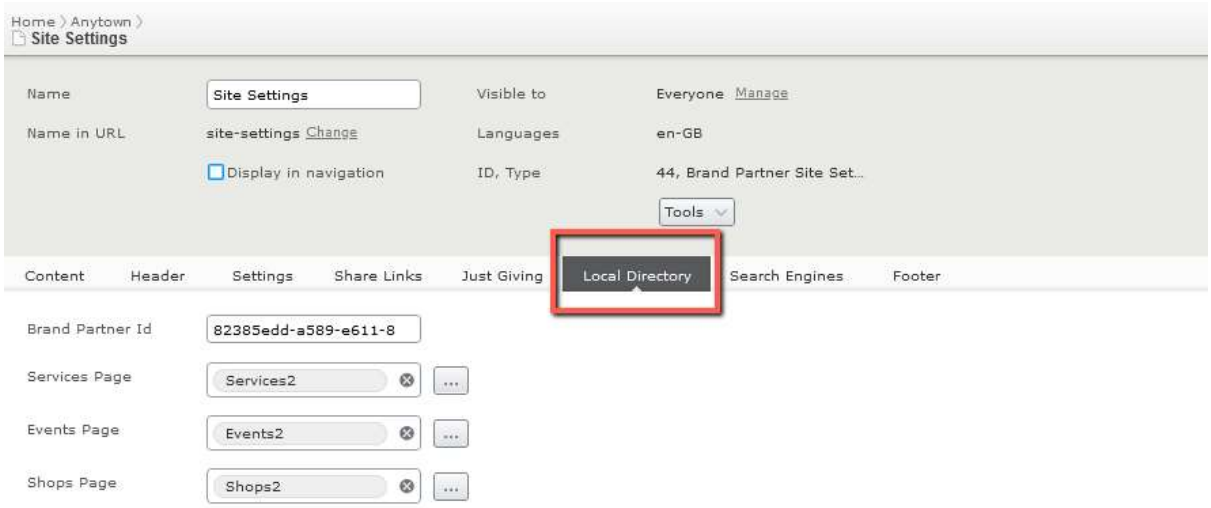
Just Giving Integration

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



Local directory portal settings

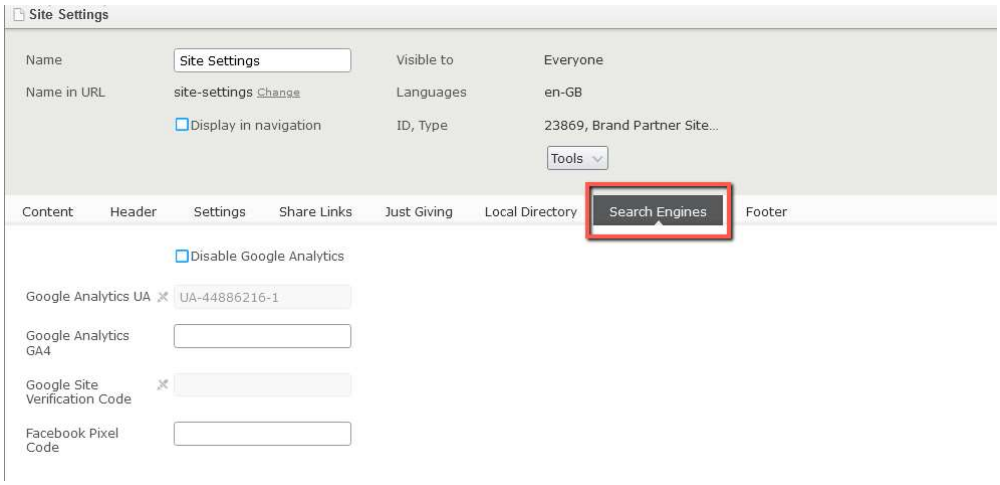


This section relates to your portal driven pages. You should not delete these page links or change the Brand Partner ID as these pull through the data of your services from the partner portal

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



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

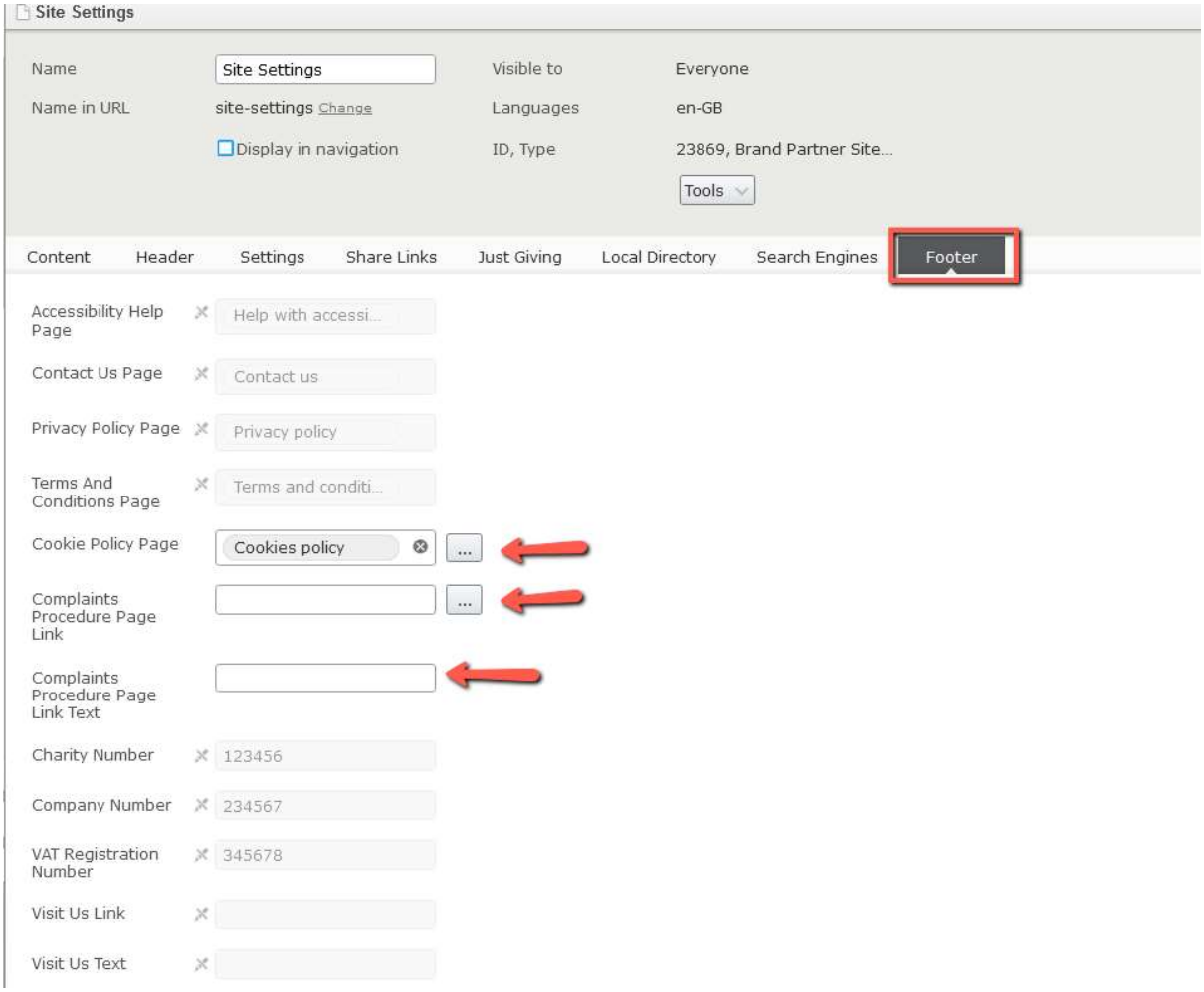
https://support.google.com/webmasters/answer/9008080?hl=en

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.



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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