COMING SOON

IBM Digital Experience: Optimize your site creation experience!

Stefan Behl
IBM Software Engineer

June 2015

Please note

IBM's statements regarding its plans, directions, and intent are subject to change or withdrawal without notice at IBM's sole discretion.

Information regarding potential future products is intended to outline our general product direction and it should not be relied on in making a purchasing decision.
The information mentioned regarding potential future products is not a commitment, promise, or legal obligation to deliver any material, code or functionality. Information about potential future products may not be incorporated into any contract. The development, release, and timing of any future features or functionality described for our products remains at our sole discretion.

Performance is based on measurements and projections using standard IBM benchmarks in a controlled environment. The actual throughput or performance that any user will experience will vary depending upon many factors, including considerations such as the amount of multiprogramming in the user's job stream, the I/O configuration, the storage configuration, and the workload processed. Therefore, no assurance can be given that an individual user will achieve results similar to those stated here.

Toolbar Evolution

Home   Administration   Applications   Search Center   Tag Center   View Moc   Project: **Monthly Update**
                                                                                            Edits are added to project as drafts

Overview   Content   Style   Layout   Revert   Save Draft   More ▾

Page Properties Published | Today   **Project Content** Active | Manage

Name: **Welcome**   No items to display.
Friendly Url: Welcome
Workflow Stage: None

Web Content: Welcome

8.0

Welcome   Getting Started   wpsadmin   Actions   Log Out   ⑦   IBM

⊕▾   ▢▾   ⚒▾   📧   Published Site ▾   Edit Mode: ON   ⓘ   IBM.

Projects   Create   Page   Menu ☰   ✖

Welcome   Content > Social Content

Page   **Social Content**   **8.5**

Applications   Contents - 11   Filter: Published ▾   Sort: True Order ▾   ▤ ▦   ⚙

Content

List of People   List of Communities   List of Forum Topics   List of Blog Posts   List of Files   List of Community Events

1 - 6   7 - 11

░░ **Information Portlet**   ▾≡

Web site creation process

Functional overview and conceptual design

Customizing the site toolbar

Toolbar programming model

Q&A
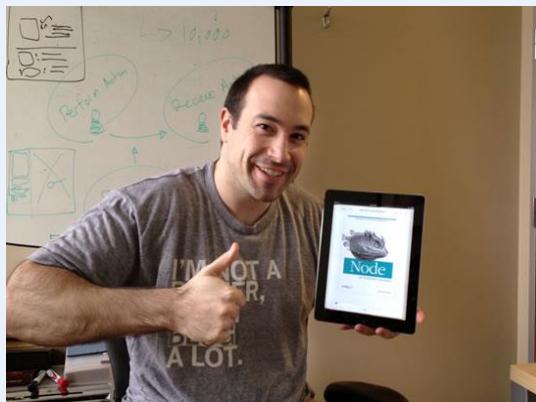
Site Creation Ease of Use

A digital marketing professional can visually create and brand a **new live site** including, populating, localizing and optimizing for search engine visibility, with robust preview, and easy deployment – all accomplished by using a standard desktop browser or tablet and without involving a system administrator or front-end developer.

Site Creation: Personas

Web Developer

Developing reusable templates, page components, plugins, and themes

Marketing Manager

Creating and managing content that is personalized and optimized
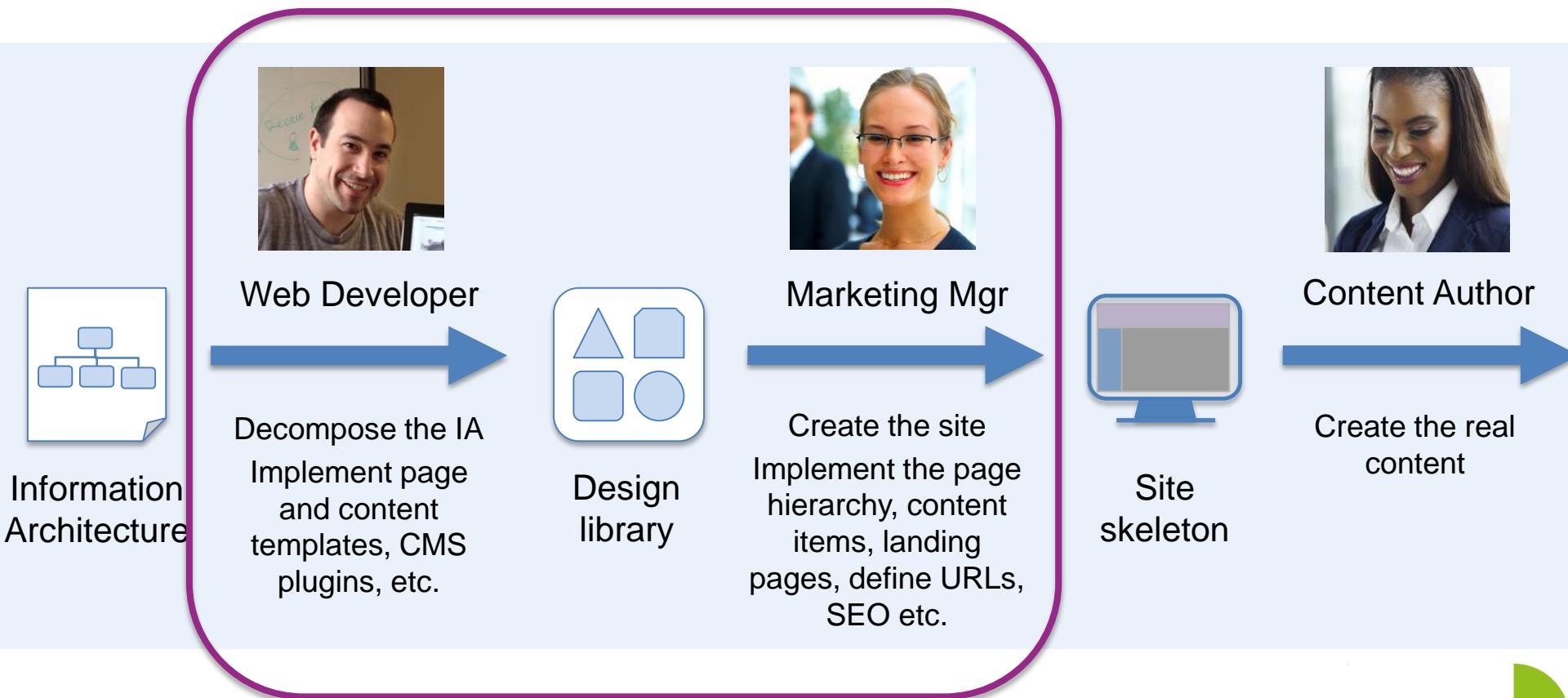
Content Author

Providing relevant content that attracts site visitors

Other personas: Site information architect, Web designer

Site Creation Process (simplified)

Information Architecture → **Web Developer**: Decompose the IA Implement page and content templates, CMS plugins, etc. → **Design library** → **Marketing Mgr**: Create the site Implement the page hierarchy, content items, landing pages, define URLs, SEO etc. → **Site skeleton** → **Content Author**: Create the real content
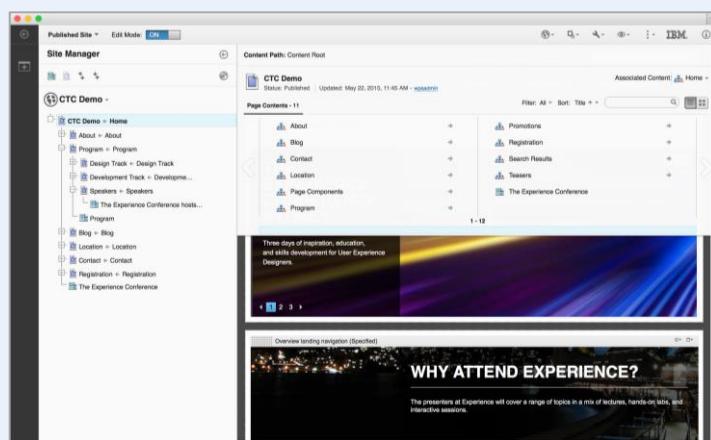
Core Element: Site Toolbar

- Introduced with DX 8.5
- Primary UI for business users to edit /populate the site
- Goal: Optimize the site toolbar for web site creation

Web
Developer

Populates and
customizes the
toolbar

Digital
Marketer

Uses the toolbar
to assemble the
site

Site Toolbar 2.0
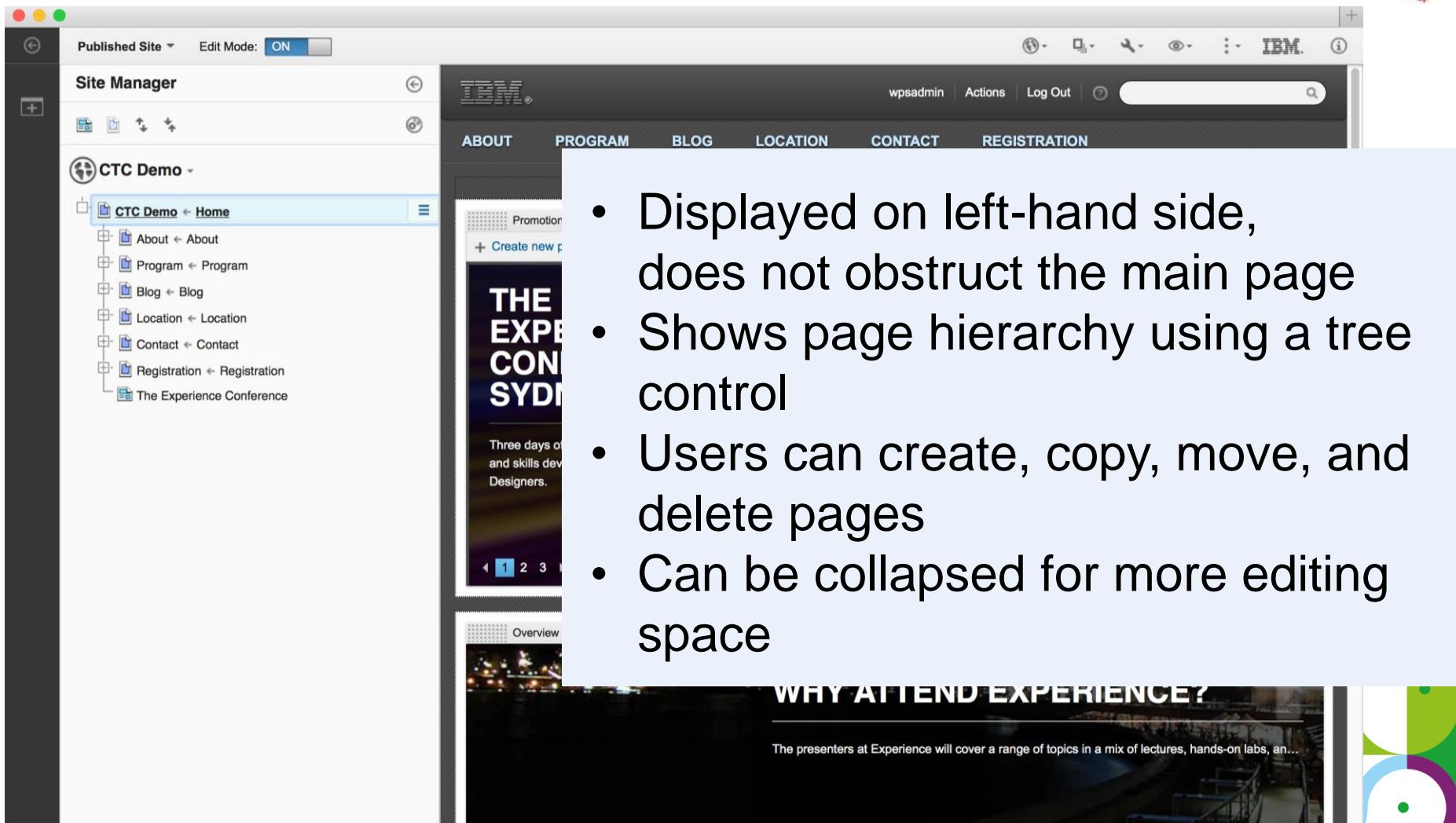
- Goal: Simplify web site creation
  - Assemble pages based on templates
  - Simplify creation of landing pages
  - Support for page components

- Design goals
  - Visualize the page hierarchy in a familiar way
  - Reveal the relationship between pages and content in a clear and meaningful way
  - Reduce need for jumping into authoring environment UI
  - Alignment with in-place and inline editing

Site Manager

COMING SOON

- Displayed on left-hand side, does not obstruct the main page
- Shows page hierarchy using a tree control
- Users can create, copy, move, and delete pages
- Can be collapsed for more editing space

Site Manager (2)

- Tree view includes content items (lazy load)
- Users can create, delete, copy, and move content
- User can add content references (teasers) to pages

Site Manager (3)

- Tree view can be expanded to view all content that is related to the page
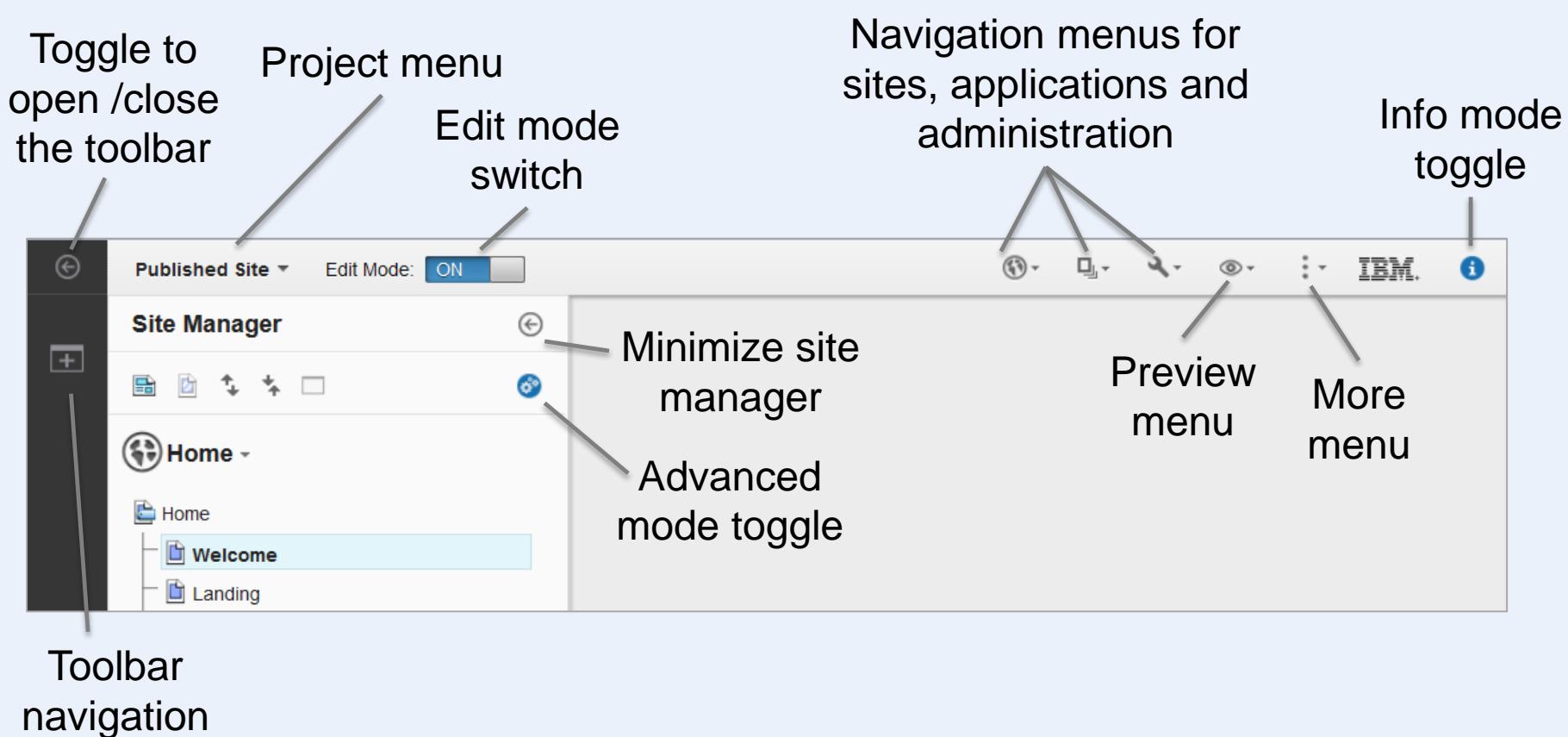
Create Content
Child of **Welcome**

Title:

Notre Dame Paris

Content URL:

/Home/Welcome/**notredameparis**

notredameparis

Templates - 22
Content templates include a default appearance and structure. New content items display in site manager.

Filter templates

Sort: Title↑

Article

Greenwheels Trip   View Description

Article

Blog Home

Blog Post

Comment

Forum Topic Details

Create Content

Simplified content creation

- Create content items based on content templates

- New content item is added to associated site area

- Does not add a web viewer portlet to the page

- Content templates can be "promoted" for a page by mapping them to the associated site area

- Content template mappings are creating automatically when an item is dropped onto the page

Toolbar 2.0: Action Bar + Navigation

COMING SOON

Toggle to open /close the toolbar

Project menu

Edit mode switch

Navigation menus for sites, applications and administration

Info mode toggle

Published Site ▾   Edit Mode: ON

Site Manager

Home ▾

Home
Welcome
Landing

Minimize site manager

Advanced mode toggle

Preview menu

More menu

Toolbar navigation
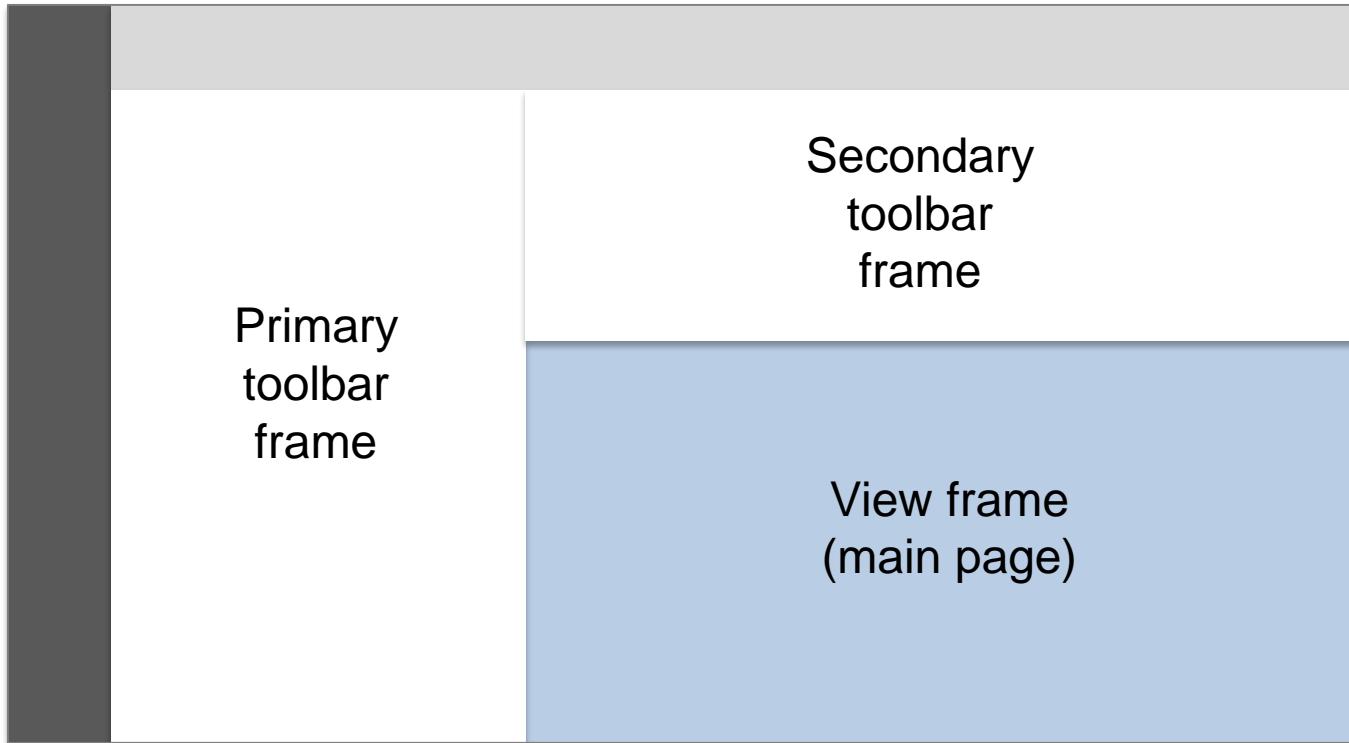
Toolbar: Conceptual Design

- Based on well-known concepts
- Separation of toolbar and main page based on iframes
- Administrative model for toolbar content: Portal pages + PAC
- Programming model for toolbar content: Portlets, public render parameters
- HTML 5 Drag and Drop
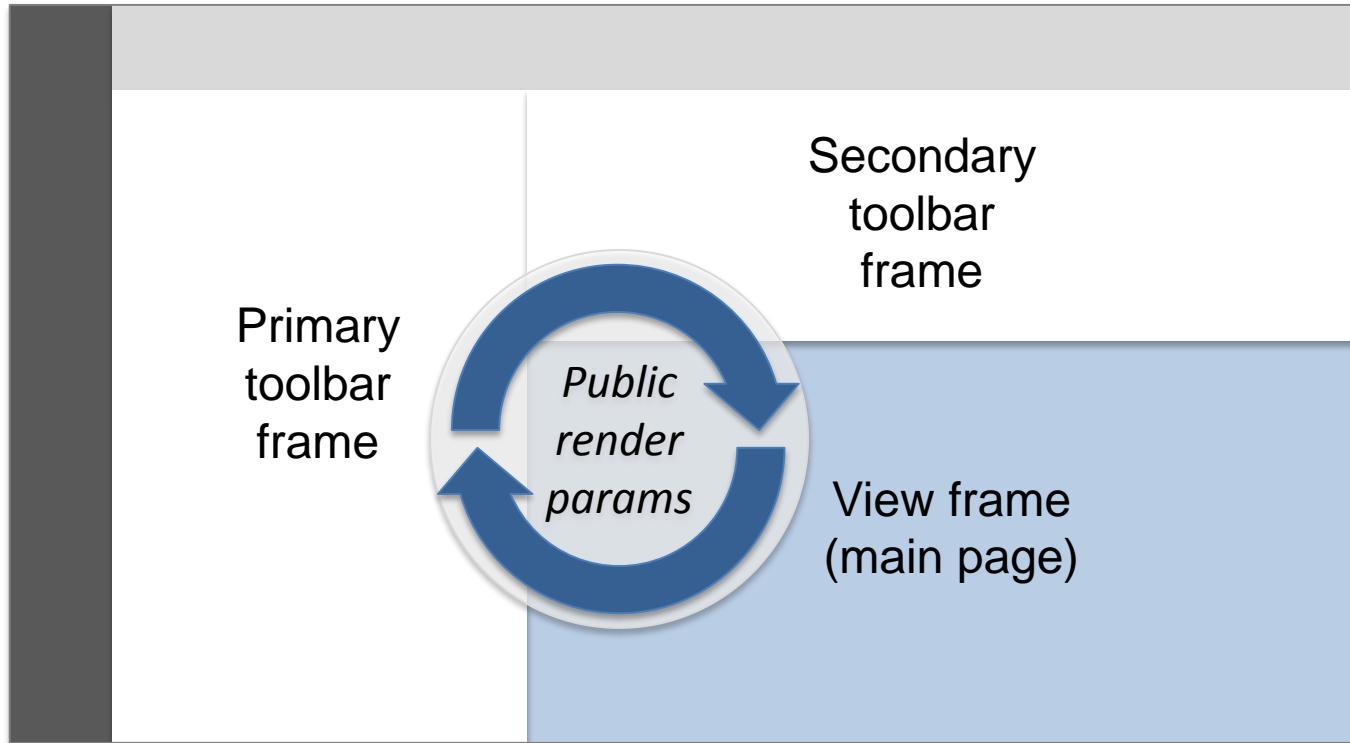
Toolbar 2.0: Frame Structure

COMING SOON

	Secondary toolbar frame
Primary toolbar frame	View frame (main page)

Target frame can be configured per toolbar page (secondary toolbar frame is default)

Toolbar 2.0: Context Synchronization

COMING SOON

Secondary toolbar frame

Primary toolbar frame

Public render params
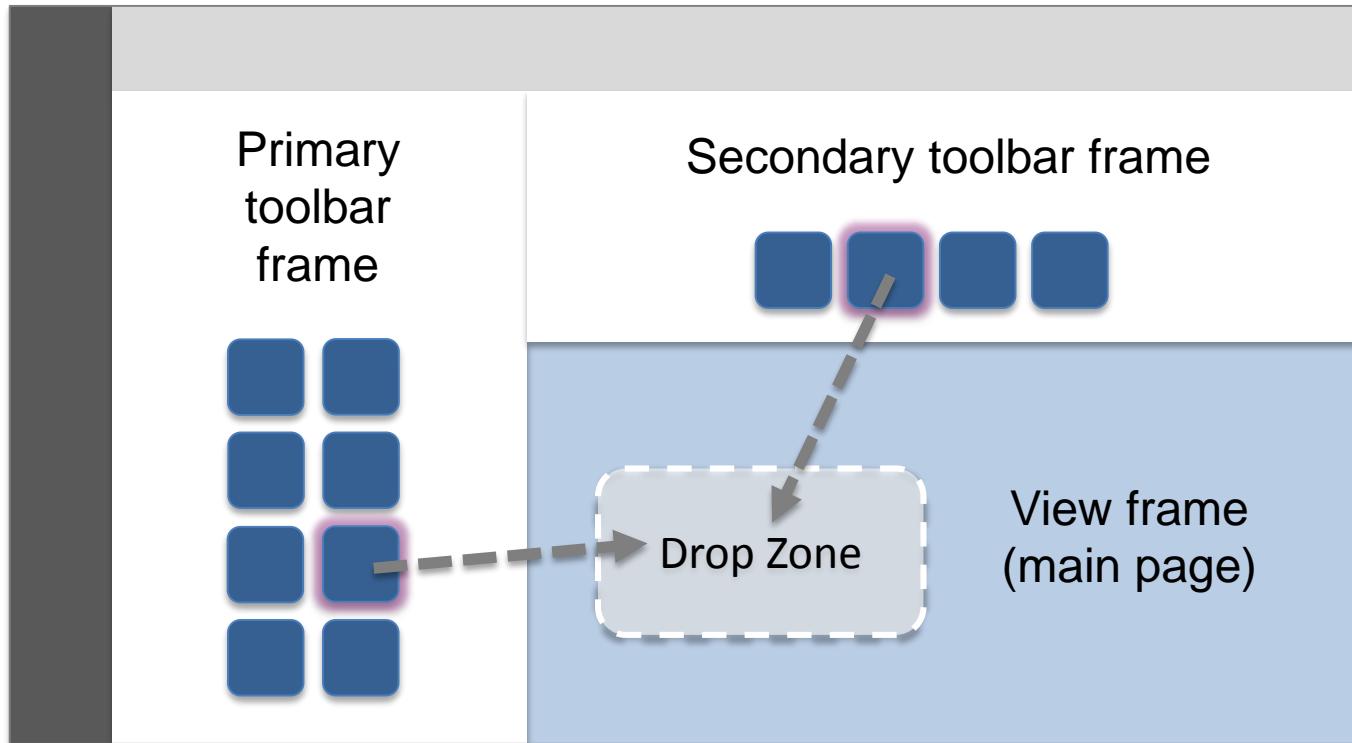
View frame (main page)

- Toolbar-specific public render parameters are never propagated to the main page in the view frame
- Context synchronization can be disabled per toolbar page
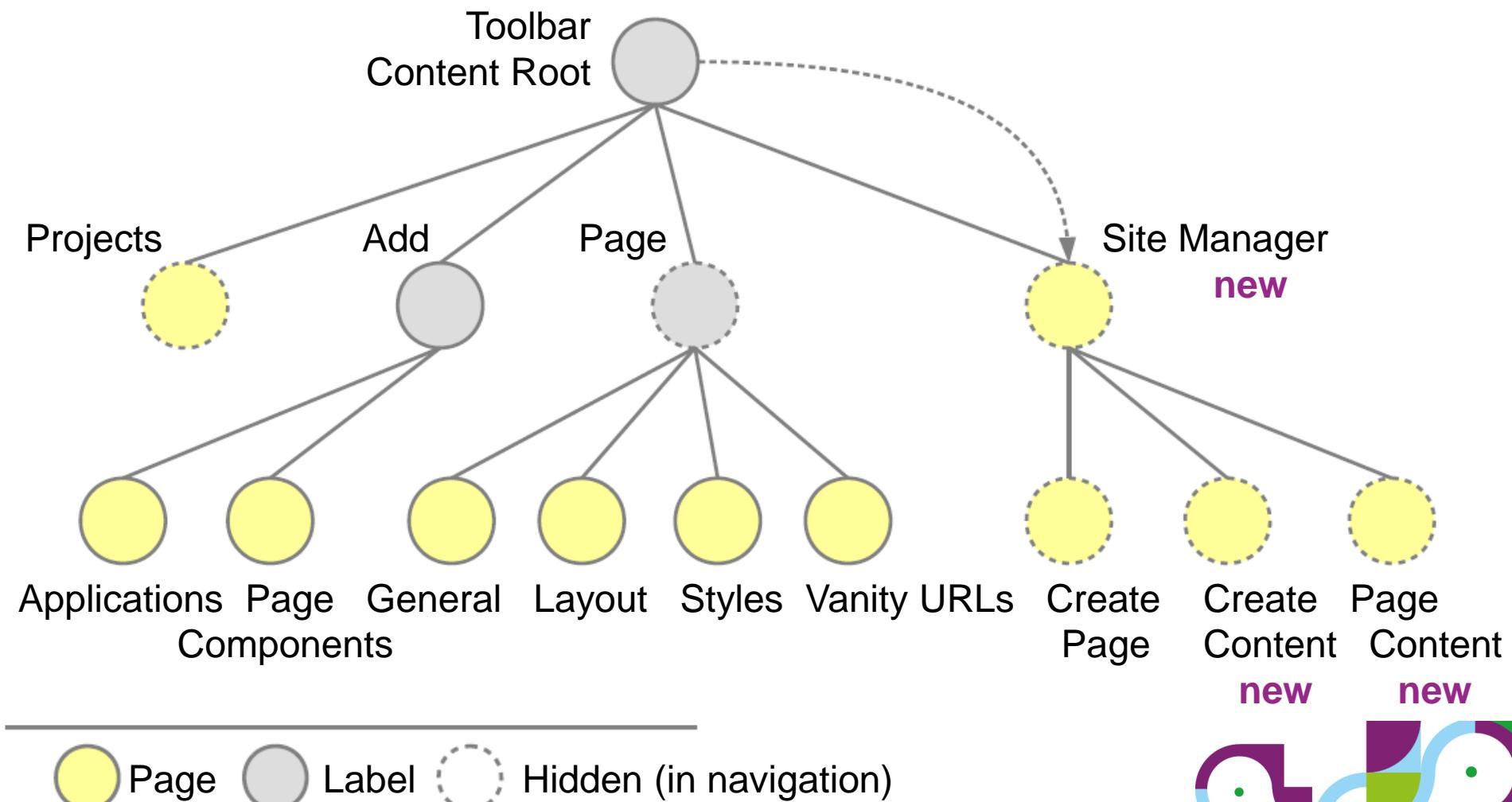
Toolbar 2.0: Drag and Drop

- Secondary toolbar frame is closed when dragging an item across its boundaries
- Primary toolbar frame stays open

Toolbar 2.0: OOTB Toolbar Pages

COMING SOON

Toolbar Content Root

Projects

Add

Page

Site Manager
new

Applications

Page Components

General

Layout

Styles

Vanity URLs

Create Page

Create Content
new

Page Content
new

Page — Label — Hidden (in navigation)
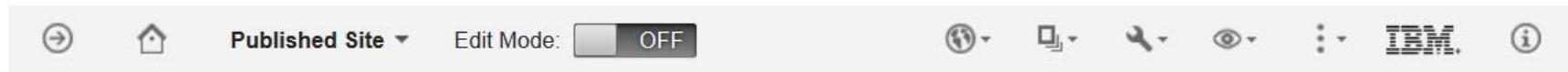
Customizing the Toolbar

- Adding the toolbar to a custom theme
- Custom control for opening the toolbar /entering edit mode
- Controlling the visibility of toolbar artifacts
- Adding styles and layouts
- Adding applications and managing application categories
- Adding page components and folders (site areas)
- Creating drag and drop configurations for page components (copy vs. link)
- Promoting page and content templates
- Configuring the site manager
- Configuring the open toolbar behavior
- Custom toolbar pages
- Toolbar context menus

Adding the toolbar to a custom theme
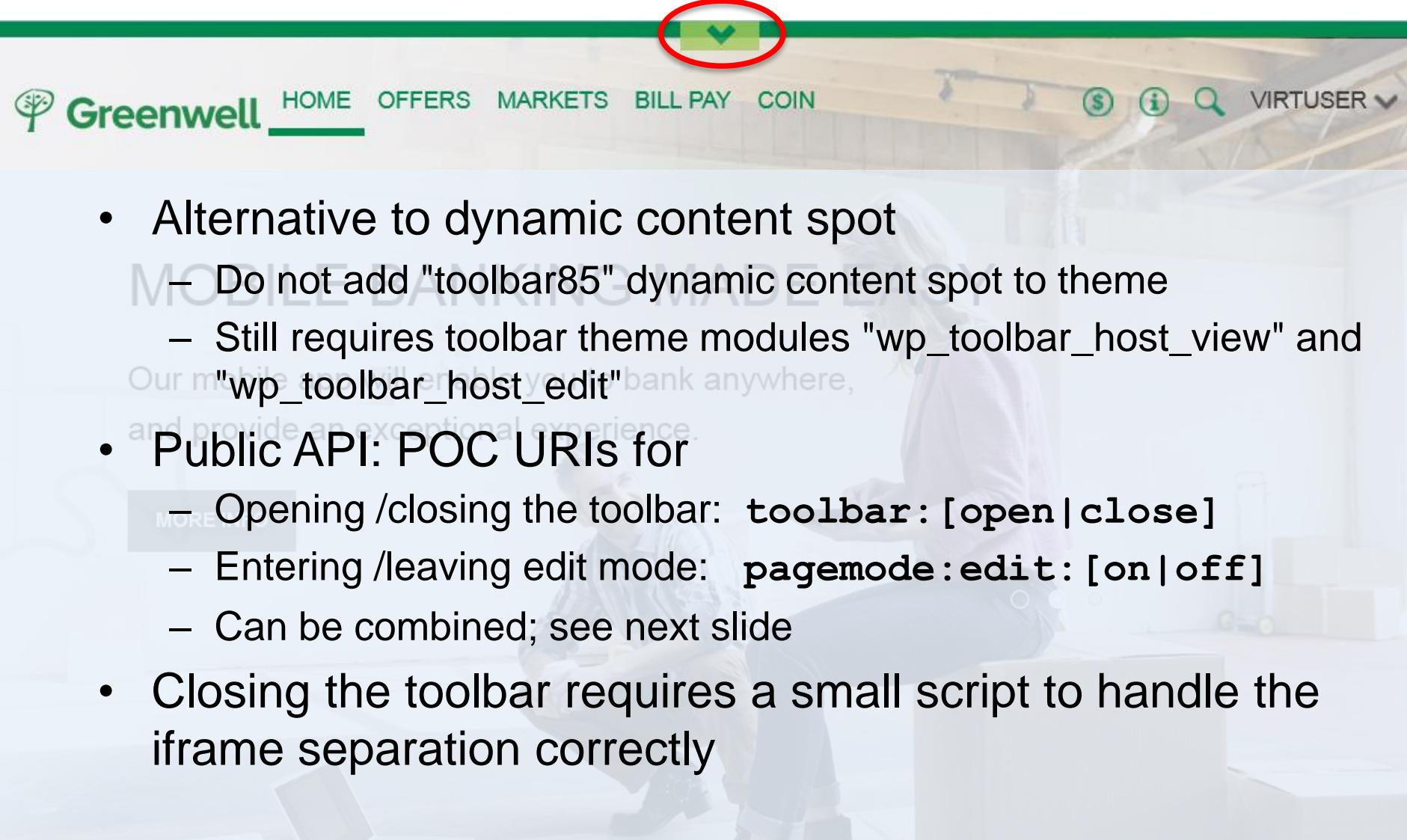
- ## Two options
  - ### Dynamic content spot + theme module(s)
    - Theme modules "wp_toolbar_host_view" and "wp_toolbar_host_edit" (deferred)
    - Dynamic spot identifier "dyn-cs:id:toolbar85"
  - ### Theme module only
    - Theme module "wp_toolbar_host_dynamic"
  - ### More details in product documentation

Migrating > Next steps > Enabling new functionality in a migrated portal > Enabling new functionality in migrated themes > Migration - Add the version 8.5 site toolbar to a version 8.0 theme
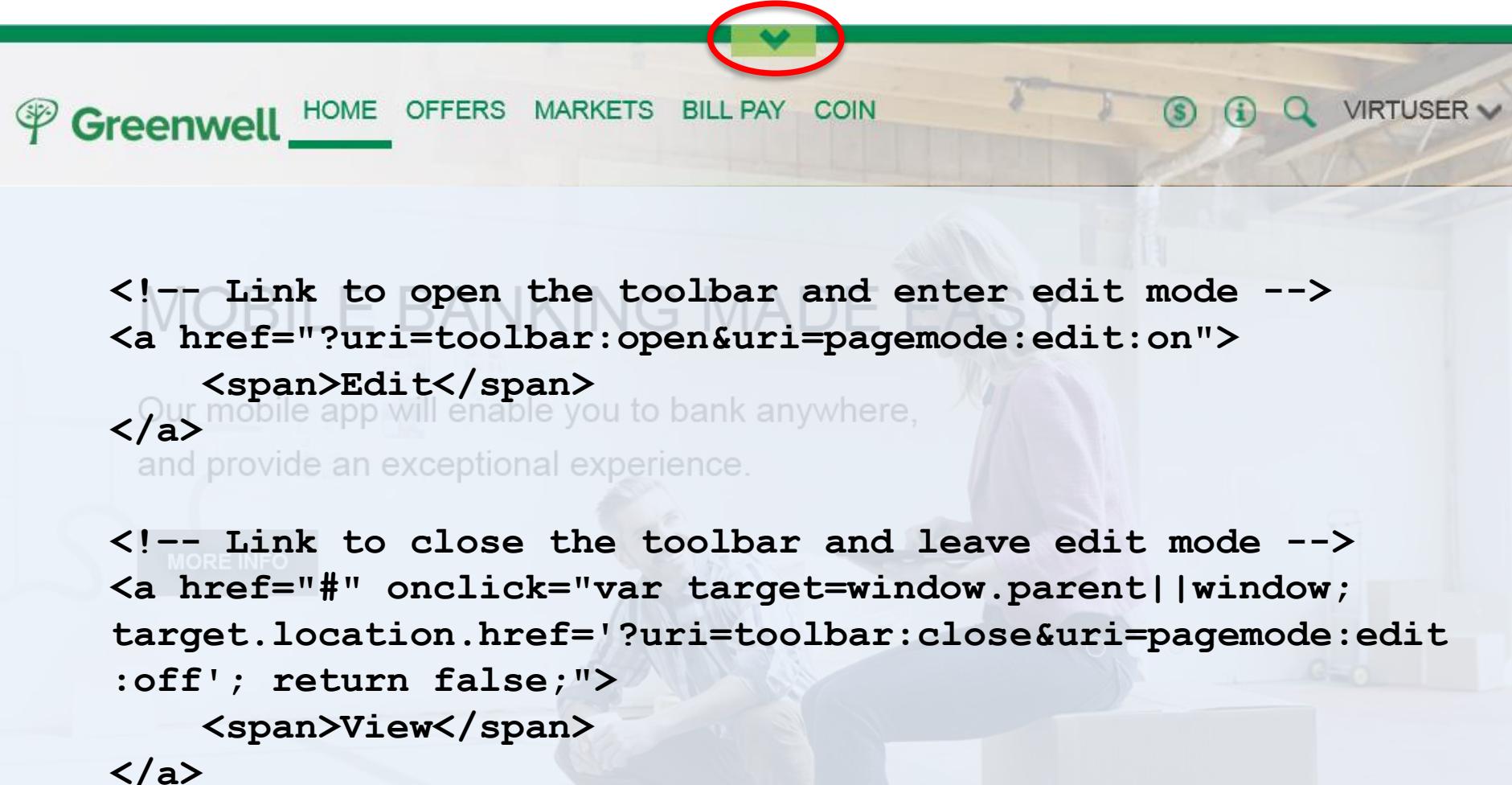
Custom control for opening the toolbar

- Alternative to dynamic content spot
  - Do not add "toolbar85" dynamic content spot to theme
  - Still requires toolbar theme modules "wp_toolbar_host_view" and "wp_toolbar_host_edit"
- Public API: POC URIs for
  - Opening /closing the toolbar: `toolbar:[open|close]`
  - Entering /leaving edit mode: `pagemode:edit:[on|off]`
  - Can be combined; see next slide
- Closing the toolbar requires a small script to handle the iframe separation correctly

Custom control for opening the toolbar (2)

```
<!-- Link to open the toolbar and enter edit mode -->
<a href="?uri=toolbar:open&uri=pagemode:edit:on">
    <span>Edit</span>
</a>


<!-- Link to close the toolbar and leave edit mode -->
<a href="#" onclick="var target=window.parent||window;
target.location.href='?uri=toolbar:close&uri=pagemode:edit
:off'; return false;">
    <span>View</span>
</a>
```
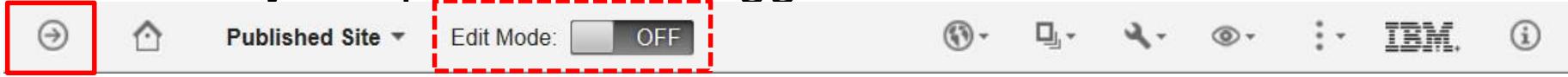
Controlling Visibility

- Based on Portal Access Control
- Grant /revoke user role on toolbar page(s)

- Visibility of top action bar
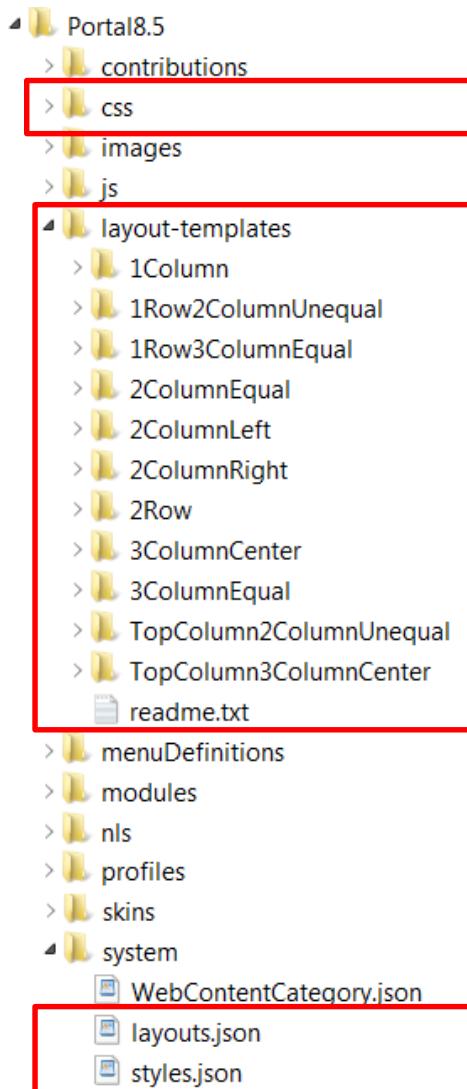
  – User role on toolbar master page ("ibm.portal.Toolbar")

- Visibility of open toolbar toggle

  – User role on toolbar content root
    ("ibm.portal.toolbar.ContentRoot")
  – Edit mode switch would no longer open the toolbar if the user
    does not fulfill this condition

- Visibility of specific toolbar tab in toolbar navigation

Adding Styles and Layouts

```
Portal8.5
    contributions
    css
    images
    js
    layout-templates
        1Column
        1Row2ColumnUnequal
        1Row3ColumnEqual
        2ColumnEqual
        2ColumnLeft
        2ColumnRight
        2Row
        3ColumnCenter
        3ColumnEqual
        TopColumn2ColumnUnequal
        TopColumn3ColumnCenter
        readme.txt
    menuDefinitions
    modules
    nls
    profiles
    skins
    system
        WebContentCategory.json
        layouts.json
        styles.json
```
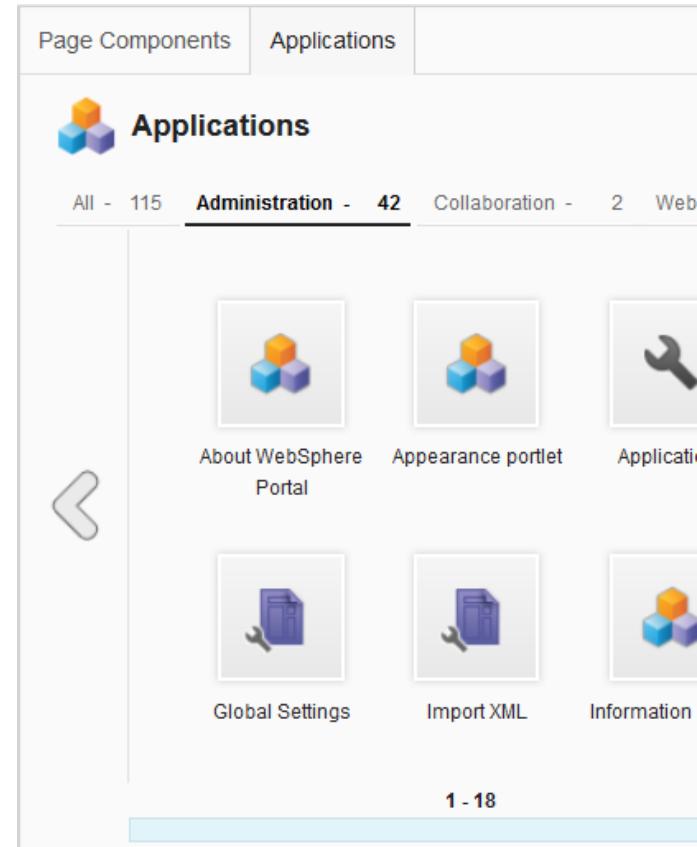
- Toolbar displays styles and layouts that are declared in json descriptors
- Additional descriptors can be registered for the theme

```
<parameter
  name="ibm.portal.shelf.style.json.myStyles"
  type="string" update="set">
  system/myStyles.json
</parameter>
<parameter
  name="ibm.portal.shelf.layout.json.myLayouts"
  type="string" update="set">
  /myContextRoot/layouts/myLayouts.json
</parameter>
```

Adding Applications and Managing Application Categories

- Categories are managed as **labels** or **URLs**
  - Content Root > Hidden Pages > Application Categories
  - Label represents the category, child pages the applications
  - URL represents the category, the URL points to an ATOM feed that lists the applications
- XMLAccess samples available
  - PortalServer/docs/xml-samples
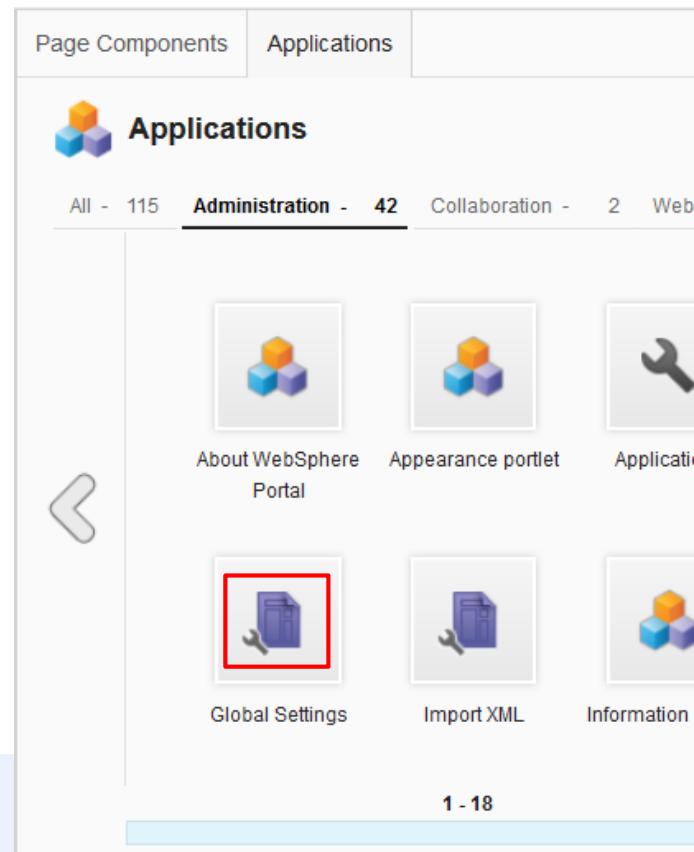
Setting up a website > Preparing for content authors > Site toolbar preparation > Customize the Create Applications tab

Application icons
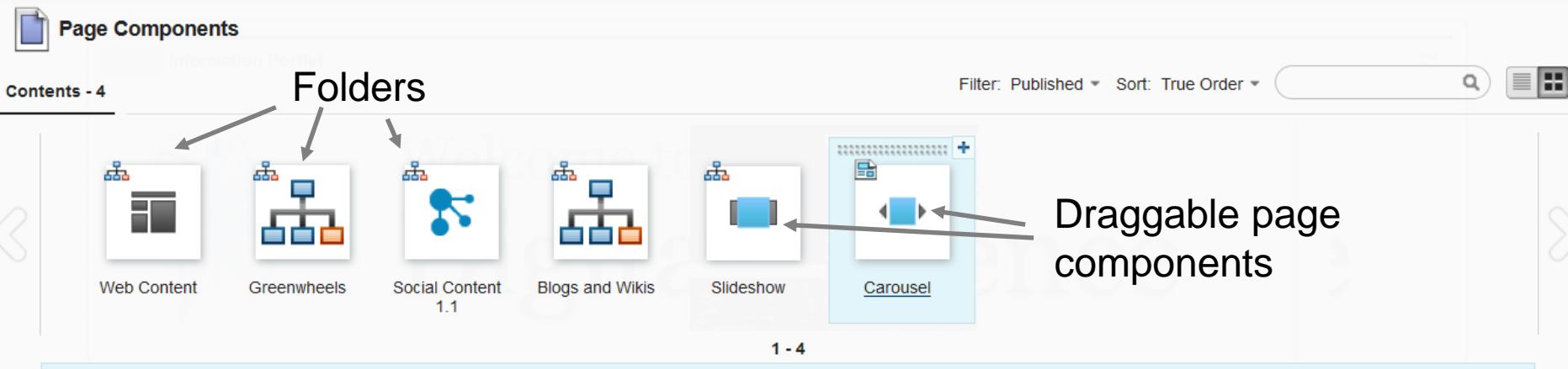
- Each portlet can reference a single icon or an icon bundle (zip file)

- The icon /icon bundle can be packaged with the portlet

- Icon reference needs to be declared in portlet.xml

```
<init-param>
  <name>com.ibm.portal.resolver.icon</name>
  <value>/resources/icon.zip</value>
</init-param>
```

Adding Page Components and Folders

- Top level view displays site areas
- Site areas can be integrated as
  - Folders the user can drill into
  - Draggable page components
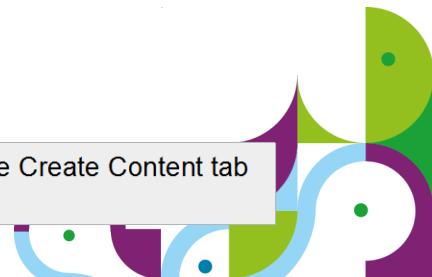
Adding Page Components (2)

- How to add page components to the tab
  - Option 1: Add profile keyword "ibm.portal.toolbar.NewContent" to site area
  - Option 2: Add a web content mapping to the Page Components toolbar page which points to the site area

- How to make page components draggable
  - Add profile keyword "ibm.portal.toolbar.draggable" to site area

• Setting up a website > Preparing for content authors > Site toolbar preparation > Adding web content to the Create Content tab of the site toolbar

Drag and Drop Configurations

- Page components typically represent generic templates
- When dropped onto a page, a web content viewer portlet is added
- Drag and drop config defines how the viewer portlet is configured
- Can be assigned to site areas or single content items
- OOTB configurations can be found under
  Content Root > Hidden Pages > DnD Configuration

Page Components > Web Content

Web Content

Contents - 4 | **Configuration**

Configuration tab only available in advanced mode
(can be activated via site manager)

Select drag and drop settings for this item

◉ **Inherited or default configuration**
Apply an inherited configuration to your content item. When an inherited configuration does not exist, the default configuration is used.

○ **No link broadcast**
This configuration will provide settings for items that should not broadcast any links. Selecting a link will not leave the context of the portlet.

○ **Link**
This configuration will create a reference to the dropped content item (instead of copying it).

Drag and Drop Configurations (2)

- Copy versus link
  - Page components typically represent generic templates for content which need to be „instantiated"
    → Use a DnD config that copies the content
  - Page components can also be used for concrete content that can be reused on multiple pages (e.g. a copyright statement)
    → Use a DnD config that references the content
  - Can be specified via portlet setting com.ibm.portal.wcm.copy.contents (requires 8.5 CF06)

```
<preferences name="com.ibm.portal.wcm.copy.contents" update="set">
    <value><![CDATA[false]]></value>
</preferences>
<preferences name="WCM_BROADCASTS_TO" update="set">
    <value><![CDATA[WCM_LINKING_NONE]]></value>
</preferences>
```

Creating pages based on page templates

Website page: **Welcome**

New Page
Child of **Welcome**

Page title:

My new page

Friendly URL name:

/Home/Welcome/my new page

my new page

Templates

Filter templates

Sort: Title↑ | Show Details

Greenwheels Basic

Greenwheels Trip Preview | Show Details

Articles

Basic

Basic (no theme)

Label

Create Page ...

- Stored under
  Content Root > Hidden Pages > Page Templates

- A page template can comprise multiple pages and still be instantiated as a whole

```
<parameter
name="ibm.portal.instantiation.page.include.desce
ndants" type="string"
update="set">true</parameter>
```

- Page templates can be "promoted" to show at the top of the template list in the toolbar; sorting in UI based on two keys
  – Primary key: sortKey (lexical)
  – Secondary key: title (alphabetical)

```
<parameter name="ibm.portal.pageTemplate.sortKey"
type="string" update="set">A</parameter>
```

COMING SOON

Creating content based on content templates

- Create content dialog shows all content templates

- Specific content templates can be "promoted" per page by mapping them to the associated site area; mappings can be managed via the toolbar:


- Recommendation: Initialize your page templates with content template mappings

Site Manager Configuration Options

- Can be configured using portlet settings ("SiteMap Portlet")
- Maximum number of content items displayed under a page

```
ibm.portal.explorer.tree.treshold
    = <number> (default: 34)
```

- Blacklist for sites that are to be excluded from site switcher

```
ibm.portal.explorer.sites.blacklist
    = <comma-separated-unique-names>
```

Open Toolbar Behavior

- Behavior of UI control for opening the toolbar

- Default behavior: Open site manager in primary frame
- Behavior can be configured via page parameter that are set on the toolbar content root (VP scoped)
    - **ibm.portal.toolbar.defaultTabURI.primary = <uri>**
      URI of the default tab that should automatically be displayed in the primary toolbar frame after opening the toolbar
    - **ibm.portal.toolbar.defaultTabURI.secondary = <uri>**
      URI of the default tab that should automatically be displayed in the secondary toolbar frame after opening the toolbar
    - Both parameters are optional

Custom Toolbar Pages

- Step 1: Create a content page (or label) and append it to *Content Root > Hidden Pages > Toolbar Content Root*
  - Two nesting levels area allowed

- Step 2: Configure the toolbar page
  - Mandatory parameter (local meta data)

  ```
  <parameter name="ibm.portal.toolbar.isToolbarPage"
    type="string" update="set">true</parameter>
  ```

  - Optional parameters (see next slide)

- Step 3: Add content to the tab
  - Implement a portlet and add it to your toolbar page

Toolbar Page Parameters

- **ibm.portal.toolbar.target = "primary" | "secondary" (default)**
Specifies the target frame the page is to be displayed in. Defaults to the secondary toolbar frame.

- **ibm.portal.toolbar.reloadOnResize = true | false (default)**
Specifies whether or not the toolbar page is to be reloaded if the toolbar frame is resized. Defaults to false.

- **ibm.portal.toolbar.disableStateSynchronization = true | false (default)**
Special setting to disable the context synchronization feature for a toolbar page. In that case the toolbar page is not reloaded in case of context changes. Typically toolbar pages depend on the context (e.g. on the page that is currently displayed in the view frame.

- **com.ibm.portal.Hidden = true | false**
Can be used to hide /show a toolbar page in the toolbar navigation. Defaults to true.
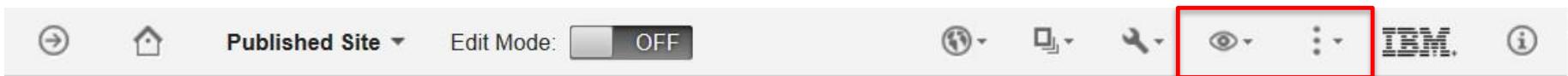
Toolbar Page Parameters (2)

- The following parameters can be used to configure the dimensions of toolbar pages that are displayed in the secondary toolbar frame

- Page parameters (all optional)
  - ibm.portal.toolbar.**width** default: "100%"
  - ibm.portal.toolbar.**minWidth** default: -
  - ibm.portal.toolbar.**maxWidth** default: -
  - ibm.portal.toolbar.**height** default: -
  - ibm.portal.toolbar.**minHeight** default: "250px"
  - ibm.portal.toolbar.**maxHeight** default: "100%"

- Values can be floating point numbers, percentages or pixel values (e.g. "0.5", "80%", "320px")

Toolbar Context Menus

- Preview menu
  - Menu ID "previewActions"
- More Menu
  - Menu ID "moreActions"
- Context menu framework
- Public extension points

Toolbar programming model

- Portlet programming model: Java Portlet API

- Context sharing with main page: Public render parameters
  - Toolbar framework synchronizes the public render parameters between the toolbar and the view theme
  - Pre-defined public render parameters to work with portal state:
    - Page Selection
    - Edit mode, information mode
    - Locale

Potential Future Enhancements (Site Creation)

- Visual editor for creating responsive layouts for portal pages and WCM content

- Toolbar palettes for favorites and recently used page components /applications

- Multiple layouts per page per content template

Tell us what your business users would like to see!

Thank You!