

**DACH Exceptional Digital Experience Meet the Lab**  
**June 4-5, 2014**

# **Site Authoring Toolbar**

## **IBM Digital Experience 8.5**

**Stefan Behl, IBM**  
**June 5, 2014**



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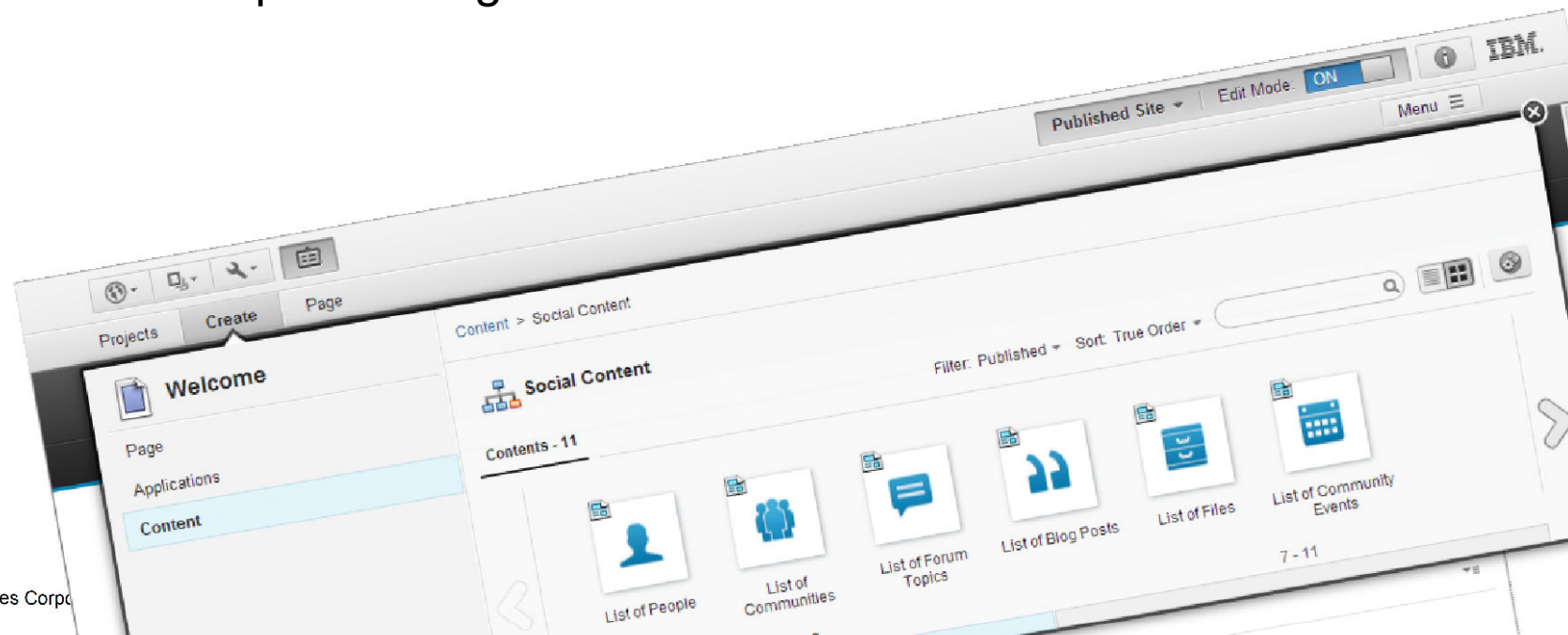
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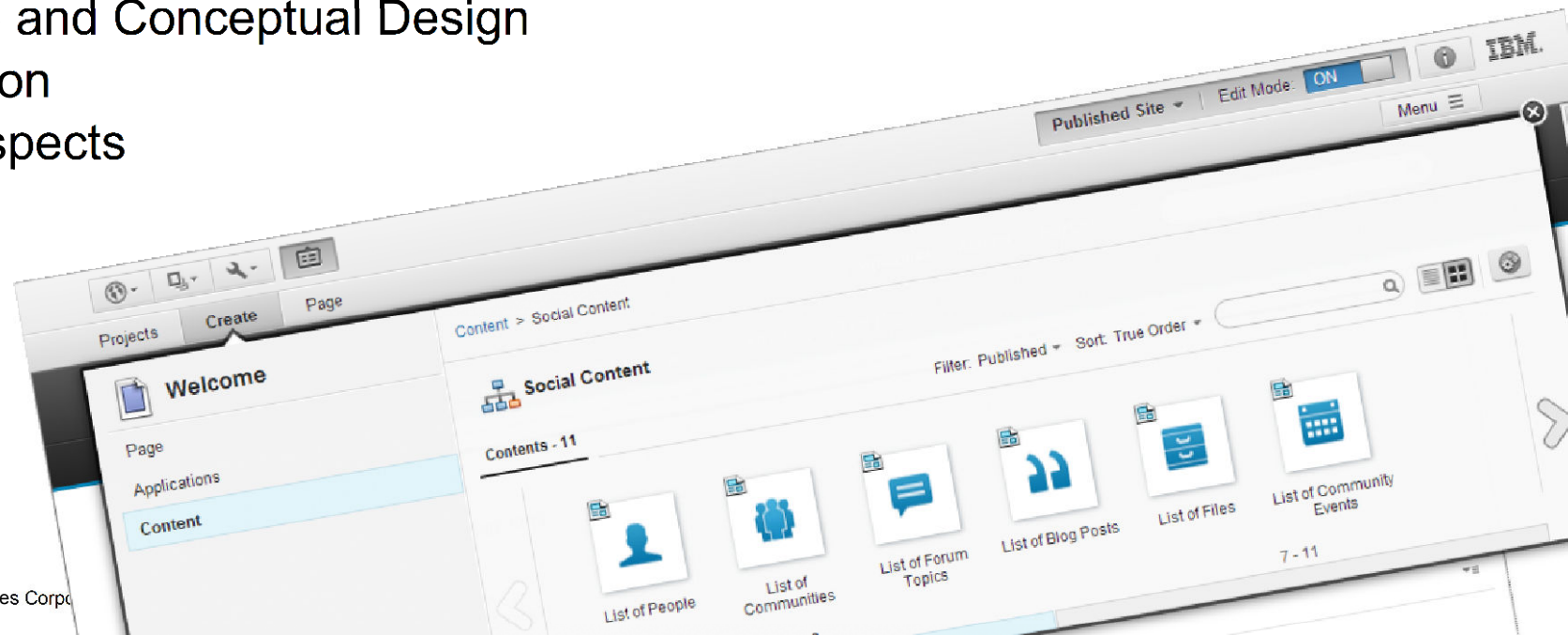
# Agenda

- Goals and Requirements
- UX Design
- Architecture and Conceptual Design
- Demo



# Contents

- Goals and Requirements
- UX Design
- Functional Overview
- Architecture and Conceptual Design
- Customization
- Migration aspects



# Goals and Requirements UX Design

## Goals and Requirements

- Provide an end-to-end solution for business users who create and manage pages and content
  - Create pages based on templates
  - Manage page properties (e.g. layout, URLs etc.)
  - Manage page content
  - Workflow and project support

## Goals and Requirements

- Provide an end-to-end solution for business users who create and manage pages and content
- Provide a consistent and seamlessly integrated experience
  - Usability, efficiency, performance
  - Based on well-defined, repeating visual patterns
  - WYSIWYG
  - Context sensitivity

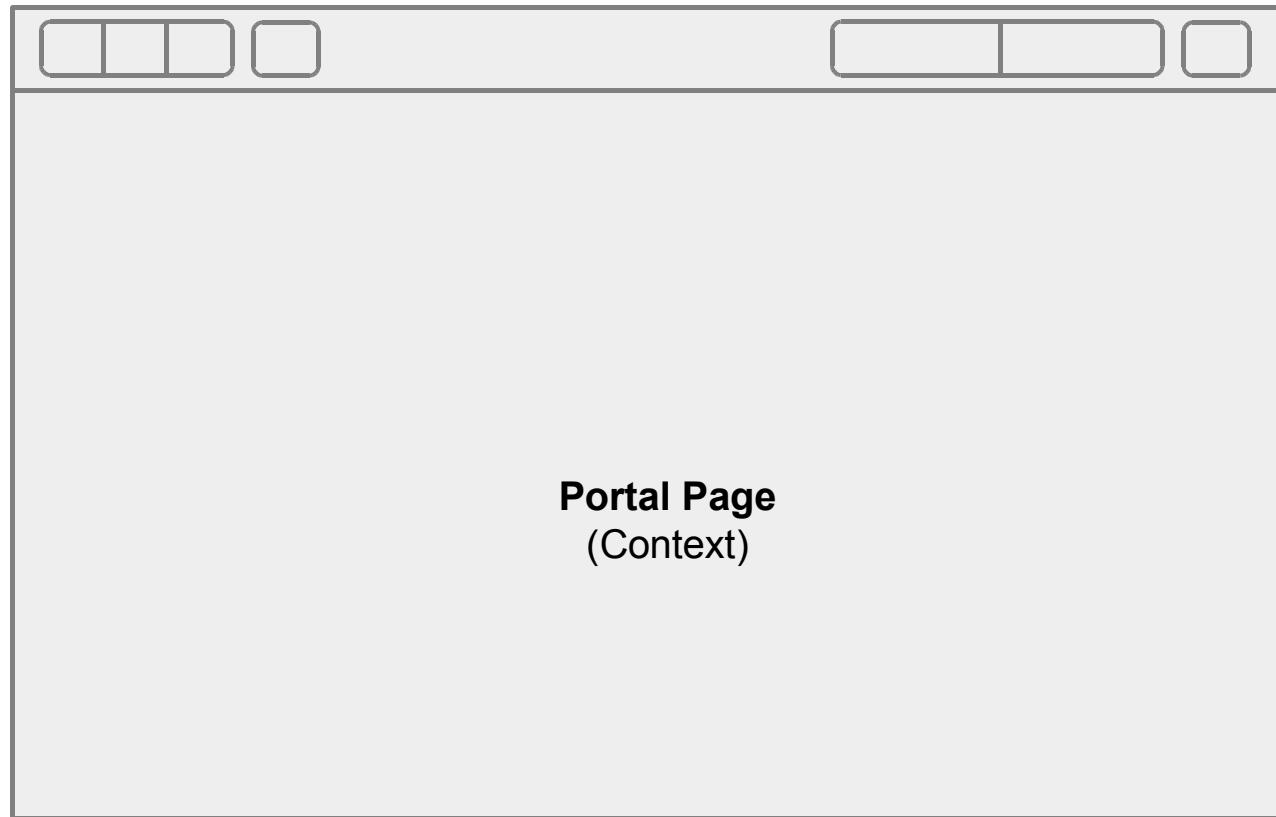
## Goals and Requirements

- Provide an end-to-end solution for business users who create and manage pages and content
- Provide a consistent and seamlessly integrated experience
- Extensibility
  - Custom content in existing toolbar tabs
  - Custom toolbar tabs

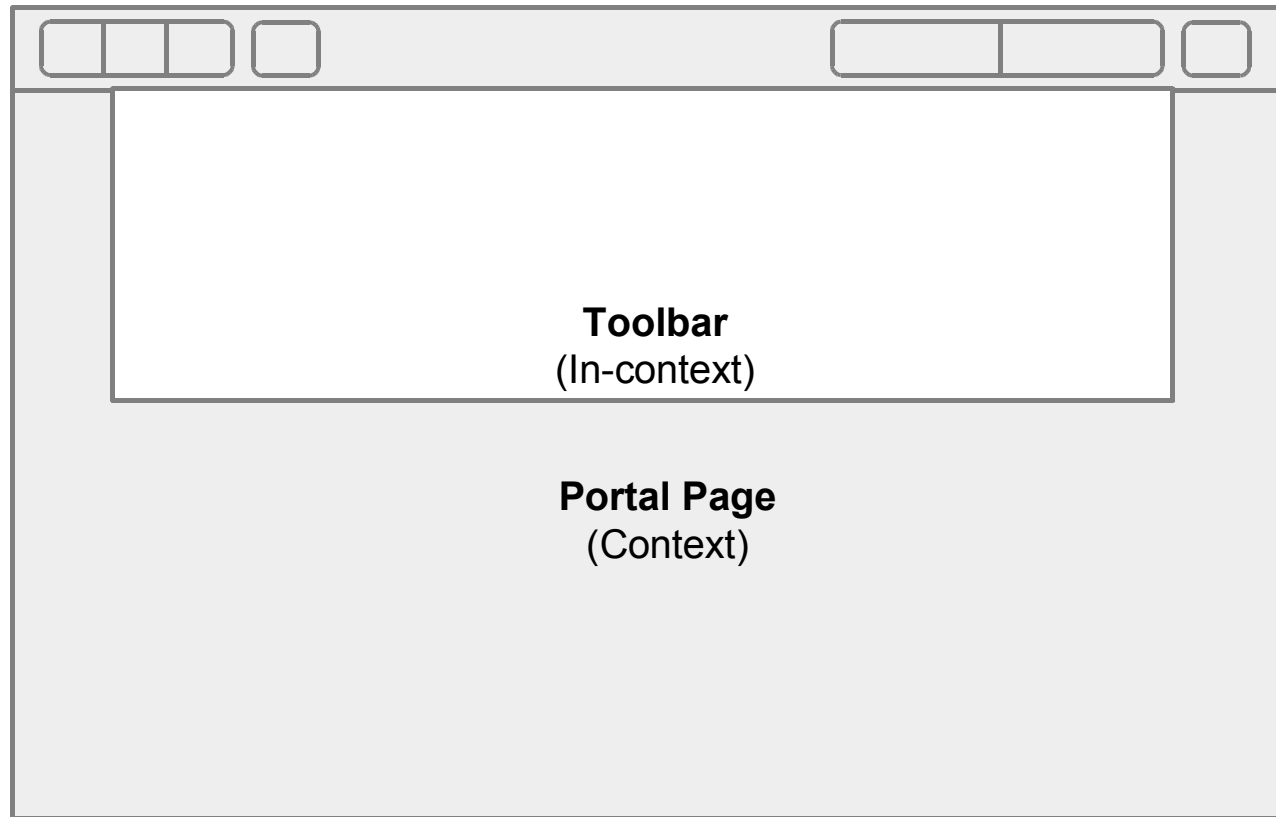
## Goals and Requirements

- Provide an end-to-end solution for business users who create and manage pages and content
- Provide a consistent and seamlessly integrated experience
- Extensibility
- Decouple authoring experience from end user experience
  - Allow toolbar to be used with any *view theme*
  - Do not “pollute” the *view theme* with JS / CSS resources that are needed for authoring / editing only
  - Do not restrict the choice of technologies, libraries or frameworks that can be used by the *view theme*

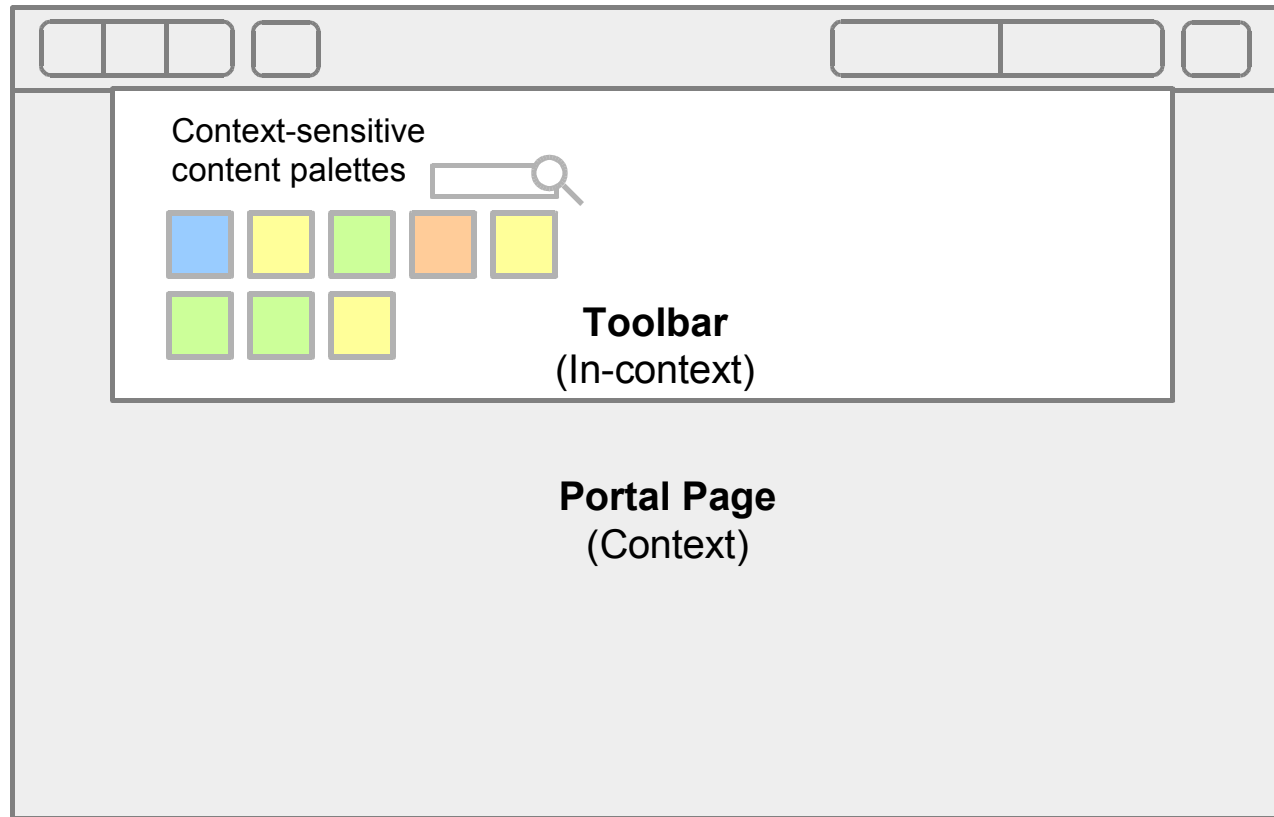
## Site Authoring Toolbar – Basic Idea



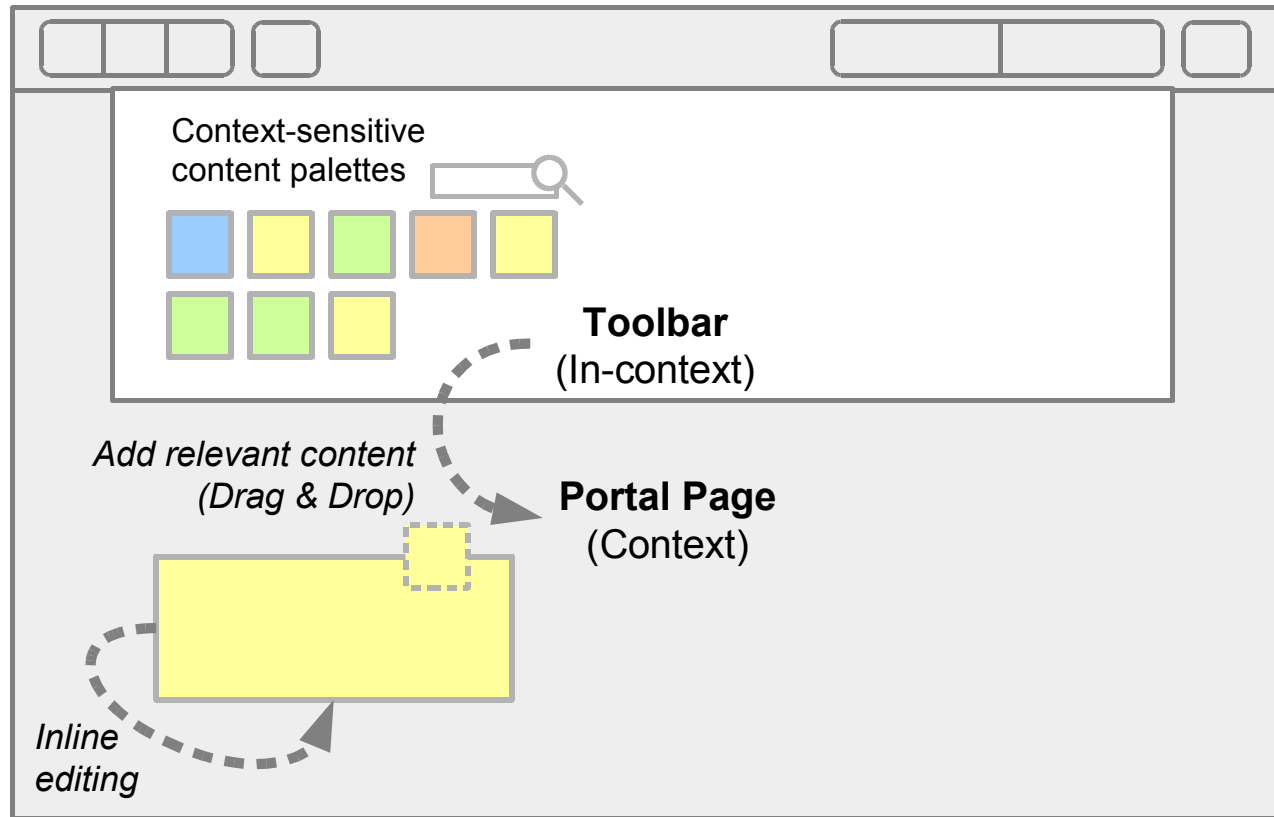
## Site Authoring Toolbar – Basic Idea



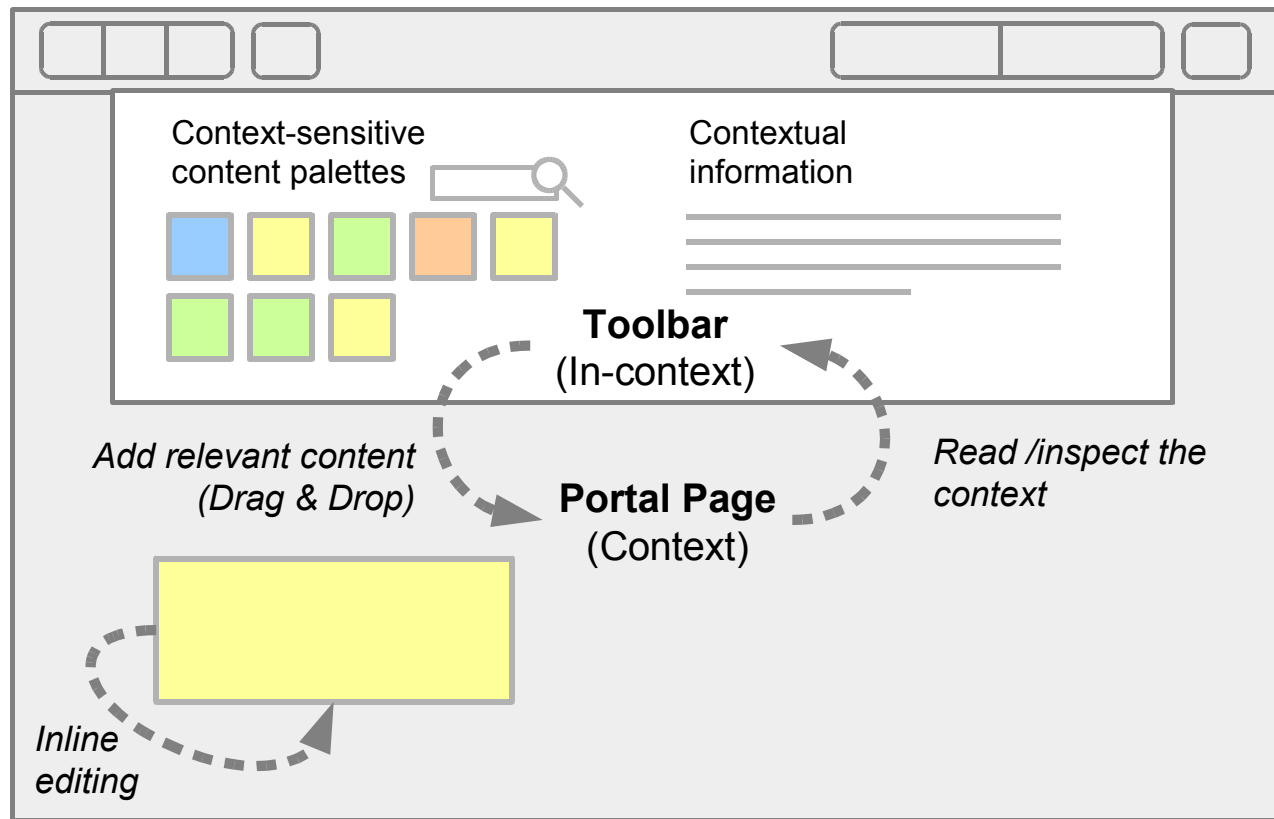
## Site Authoring Toolbar – Basic Idea



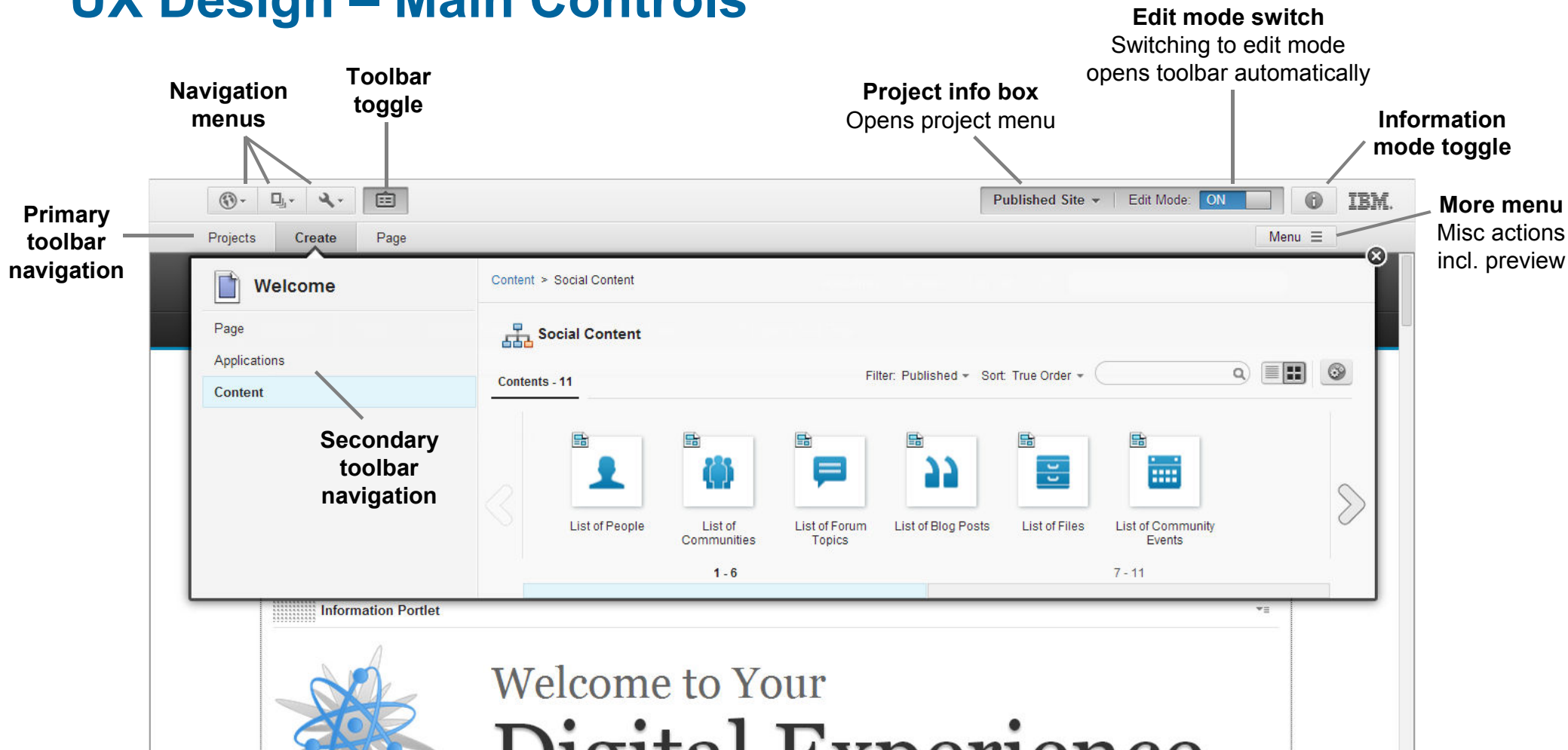
## Site Authoring Toolbar – Basic Idea



## Site Authoring Toolbar – Basic Idea

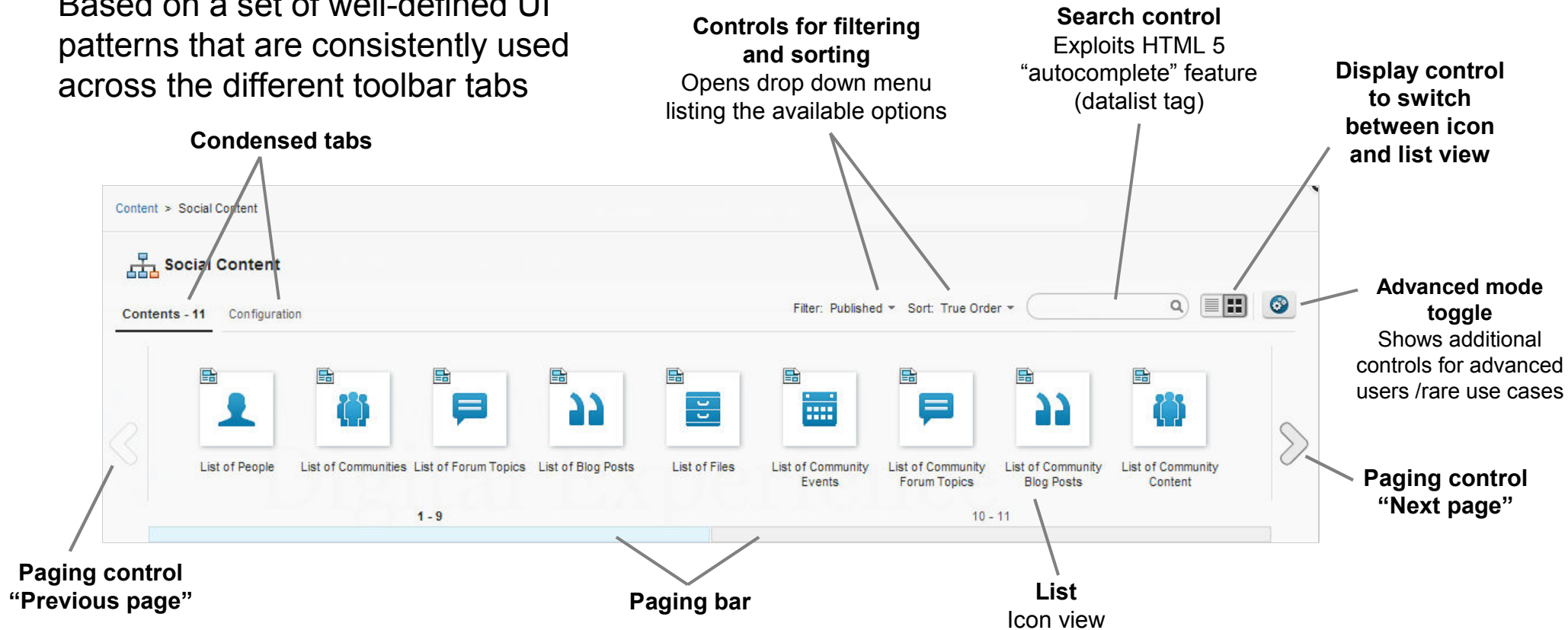


# UX Design – Main Controls



# UX Design – Toolbar Tabs

Based on a set of well-defined UI patterns that are consistently used across the different toolbar tabs

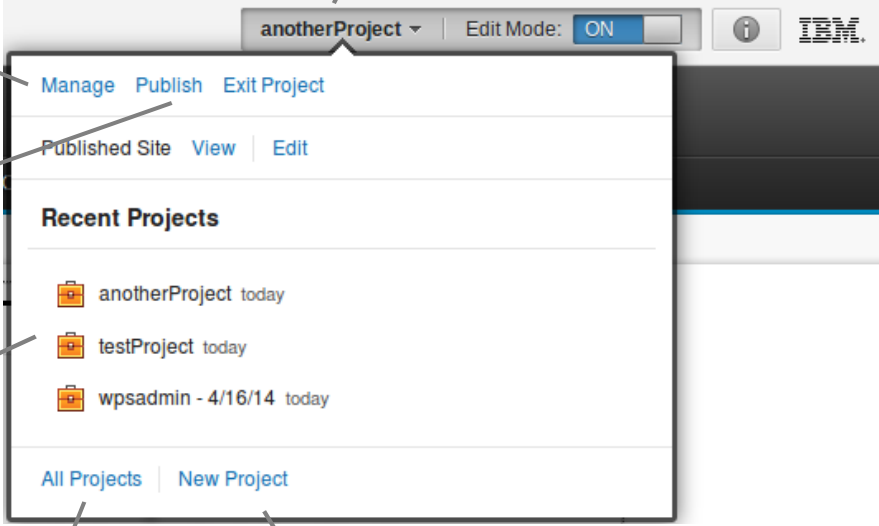


# Functional Overview

## Toolbar Tabs – Overview

Title	Description
Create	The Create tab is a label which groups multiple tabs that can be used to create new portal content and add this new content to the page using Drag and Drop.
Create > Content	Use this tab to find web content items and add these web content items to your portal page.
Create > Application	Use this tab to find portlets and add these portlets to your portal page. The portlets can be classified using categories.
Create > Page	Use this tab to create new portal pages and labels. The pages are created relative to the page that is currently displayed. You can either use child or sibling pages. Create your portal page based on one of the existing page templates.
Page	The Page tab is a label which groups multiple tabs that can be used to work with the portal page that is currently selected in the view area.
Page > General	Use this tab to view or edit the basic properties of your portal page.
Page > Layout	Use this tab to apply a new page layout to your portal page. The available page layouts are defined in the theme your portal page is associated with.
Page > Vanity URLs	Use this tab to create new localized vanity URLs for your portal page or work with the vanity URLs that are already defined.
Page > Style	Use this tab to set a specific style /color palette for your portal page.
Projects	Use this tab to create new projects, view the available projects, manage the project workflow, or view and edit the content of the selected project

# Project Menu



The screenshot shows a web application interface with a 'Project Menu' dropdown. The menu is open, displaying options: 'Manage', 'Publish', 'Exit Project', 'Published Site', 'View', and 'Edit'. Below these is a 'Recent Projects' section with a list of projects: 'anotherProject today', 'testProject today', and 'wpsadmin - 4/16/14 today'. At the bottom of the menu are links for 'All Projects' and 'New Project'. The background shows a header with 'anotherProject' and 'Edit Mode: ON'.

**Project info box**  
Displays title of current project or "Published site"

**Manage project**  
Shortcut to WCM authoring UI to edit /configure the project and its workflow

**Workflow actions**  
that are currently applicable to the selected project

**Recent project list**  
Displays the projects the user has used before

**All Projects**  
Shortcut to the Projects tab to view all projects, e.g. the projects that were created recently by other users.

**New Project**  
Shortcut to launch the form for creating a new project based on a project template

# Projects

The screenshot shows the 'Projects Overview' page in the IBM Software interface. The page is divided into three main sections: 'New Project', 'Recent Projects', and 'All Projects'. The 'New Project' section on the left contains a dropdown menu for 'Create a project from: Default Project Template', a text input field with the value 'wpsadmin - 4/16/14 - 2', and a 'Create' button. The 'Recent Projects' section in the middle lists three projects: 'anotherProject today', 'testProject today', and 'wpsadmin - 4/16/14 today'. The 'All Projects' section on the right has a search bar, a sort dropdown set to 'Title', and lists the same three projects. Handwritten cloud annotations are present: one under the 'New Project' form stating 'Form to create a new project based on a project template', one under the 'Recent Projects' list stating 'List of projects the user has used recently', and one under the 'All Projects' list stating 'List of all active projects incl. controls for searching and sorting'. The top of the interface includes navigation tabs for 'Projects', 'Create', and 'Page', along with status indicators for 'Published Site', 'Edit Mode: OFF', and the IBM logo.

Published Site Edit Mode: OFF IBM

Projects Create Page Menu

Projects Overview

**New Project**

Create a project from: Default Project Template

wpsadmin - 4/16/14 - 2

Create

**Recent Projects**

- anotherProject today
- testProject today
- wpsadmin - 4/16/14 today

**All Projects** Sort: Title ↑

- anotherProject today
- testProject today
- wpsadmin - 4/16/14 today

Form to create a new project based on a project template

List of projects the user has used recently

List of all active projects incl. controls for searching and sorting

## Projects (2)

The screenshot displays the IBM Software Projects interface. At the top, a navigation bar includes icons for navigation, a search bar, and a menu. The main header shows 'anotherProject' and 'Edit Mode: ON'. Below this, a 'Projects Overview' breadcrumb leads to 'anotherProject'. The main content area is titled 'anotherProject - 2' and shows 'Active' status and 'Created: wpsadmin - today'. A 'Contents - 2' section lists 'Welcome Draft' and 'newPage Draft'. A context menu is open for 'newPage Draft', showing options: 'Edit properties', 'Edit', 'Delete Item', 'Remove from Project', and 'Publish'. Three callout boxes provide additional context: one points to the context menu, another points to the 'Contents' list, and a third points to the search and filter controls.

Context menu to work with a specific draft item, in particular with its workflow

List of pages and content items that are part of the selected project (project items)

Controls for searching, sorting, and filtering project items

# Projects (3)

The screenshot displays the IBM Software Projects interface. At the top, there's a navigation bar with icons for navigation, a search icon, and a 'Page' button. The main header shows 'anotherProject' and 'Edit Mode: ON'. Below this, a 'Projects Overview' section shows 'anotherProject - 2' in a 'Pending' state, created by 'wpsadmin' today. A 'Contents - 2' section lists two items: 'Welcome' and 'newPage', both with 'Publish Pending' status. A right-hand menu is open, showing options: 'Add to Project', 'Delete Project', and 'Create Project Template'. The background features a large, faint graphic with the text 'Welcome to Your Digital Experience' and 'Intent Targeting'.

anotherProject | Edit Mode: ON

Projects Overview > anotherProject

**anotherProject - 2**  
Pending | Created: wpsadmin - today

**Contents - 2**

- Welcome Publish Pending
- newPage Publish Pending

Filter: All | Sort: Title ↑

- Add to Project
- Delete Project
- Create Project Template

1 - 2

# Create > Page

testPage

Page

Applications

Content

Templates

Filter templates

Sort: Title ↑

Show Details

Articles

Basic Preview Show Details

Label

List of available page templates incl. controls for searching, filtering, and sorting

Page Settings

Page title:

anotherPage

Friendly URL name: Home / testPage / anotherPage

anotherPage

Page insertion point:

☒ Child of current page

☐ Previous sibling of current page

☐ Next sibling of current page

Advanced Settings

Create Page

Form for creating a new page and specifying its position

Note that you can

- create /edit page templates with the toolbar
- manage page templates in

*Administration > Portal User Interface > Page Templates*

# Create > Applications

**Application categories**  
incl. number of applications within category

**Controls for sorting, searching, and filtering**  
by title within the current application category  
(HTML 5 auto completion)

**testPage**

Page

Applications

Content

**Sort: Title ↑**

**Add application 'Add to Sametime List' to the page 'testPage'**

**List of available applications**  
within the selected category;  
Drag&drop onto underlying page

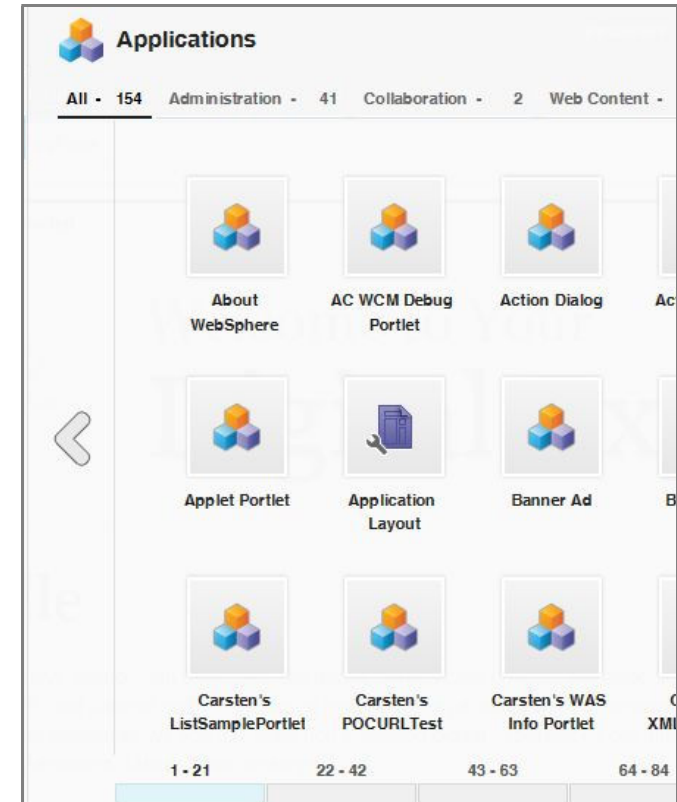
**Reload button**  
Reloads the applications from the server and invalidates /bypasses all caches

**Paging bar**

The screenshot displays the IBM WebSphere Applications management console. On the left, a sidebar shows the 'testPage' context with 'Applications' and 'Content' sections. The main area is titled 'Applications' and shows a list of application categories: 'All - 114', 'Administration - 41', 'Collaboration - 2', 'Web Content - 17', and 'Tools - 7'. Below this is a grid of application tiles, including 'About WebSphere Portal', 'AC WCM Debug Portlet', 'Add to Sametime List', 'Banner Ad', 'Bookmarks', 'Cache Viewer', 'Coach', 'Community Blog Details', 'Community Details', 'Community Forum Details', 'Content Sample Light Portlet', 'Content Sample Portlet', 'Content Targeting Dialog', and 'ContentMapping Picker'. A search bar and sort controls (Sort: Title ↑) are located at the top right. A cloud callout points to a 'Reload' button, stating 'Reload button Reloads the applications from the server and invalidates /bypasses all caches'. A text box indicates a drag-and-drop action: 'Add application 'Add to Sametime List' to the page 'testPage''. A paging bar at the bottom shows ranges of applications: '1 - 18', '19 - 36', '37 - 54', '55 - 72', '73 - 90', '91 - 108', and '109 - 114'.

## Create > Applications: Key Concepts

- **Quickly** locate your application
  - Search, categories, fast browsing
- **Efficiently** populate your pages with applications
  - Drag & Drop
  - Context button
  - Keyboard
- **WYSIWYG**
  - All change are available with full context, immediately
  - Full **project** support



# Create > Content

**Control for searching, filtering, sorting content items across site areas**  
Search is an expensive operation as it is performed recursively on entire sub-tree

**List of available site areas**  
that are configured to show up in the toolbar

## Create > Content (2)

Published Site Edit Mode: ON

Projects Create Page

testPage

Page

Applications

Content

Content > Web Content

Web Content

Contents - 4 Configuration

Filter: Published Sort: True Order

Image

Rich Text

List of Articles

Article

1 - 4

Enabling advanced mode reveals **Configuration** tab

**List of content items** that are part of the selected site area incl. controls for searching, sorting, and filtering within this site area

## Create > Content (3)

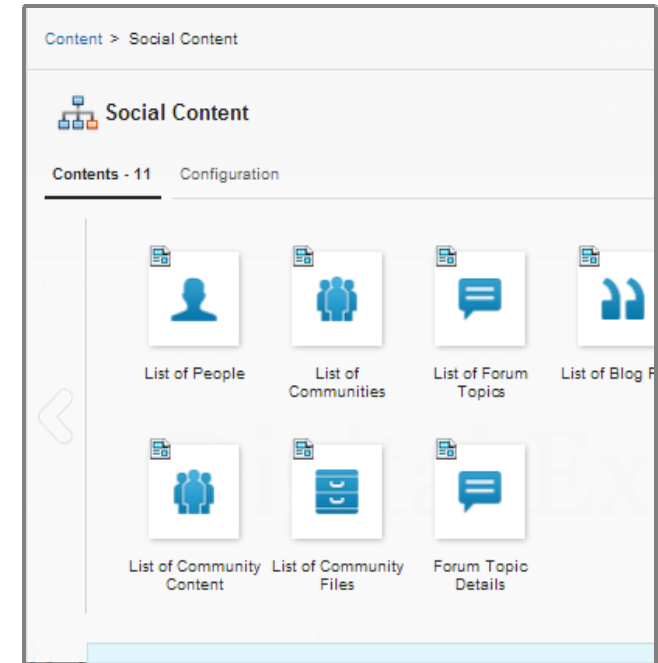
The screenshot displays the IBM Web Content Manager interface in 'Create > Content' mode. The left sidebar shows a tree view with 'testPage' selected, and 'Content' is highlighted under the 'Page' section. The main content area shows the 'Web Content' configuration page. At the top, it says 'Content > Web Content'. Below that, there's a 'Web Content' header with a tree icon. Underneath, it says 'Contents - 4' and 'Configuration'. The main section is titled 'Select drag and drop settings for this item'. It lists several options, each with a radio button:

- ☒ **None**  
No configuration selected. Default will be 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.
- ☐ Community Files Service Template  
This page contains a drag and drop configuration for the community files service
- ☐ Community Blogs Service Template  
This page contains a drag and drop configuration for the community blogs service
- ☐ Community Forums Service Template  
This page contains a drag and drop configuration for the community forums service
- ☐ Community Calendars Service Template  
This page contains a drag and drop configuration for the community calendars service
- ☐ Community Calendar, Blogs, Forums, Files, Activities, Wikis Service Template  
This page contains a drag and drop configuration for the following community services: Calendar, Blogs, Forums, Files, Activities, Wikis
- ☐ Forum Topic Details Template  
This page contains a drag and drop configuration for forum topic details

A callout bubble is drawn around the 'None' option, containing the text: 'Select a configuration (a template) that will be applied when adding a content item from the selected site area to the page'.

## Create > Content: Key Concepts

- **Quickly** locate your content items
  - Searching and filtering across site areas
- **Efficiently** populate your pages with content
  - Drag & Drop, keyboard
  - No need to create pre-configured clones of the WCM rendering portlet
- **WYSIWYG**
  - All change are available with full context, immediately
  - Full **project** support



# Page > Layout

List of available layouts  
typically defined in the theme  
of the underlying page

Orphaned portlets  
Portlets on the page which  
are not shown by the  
current layout

The screenshot shows the 'Page > Layout' configuration interface for a page named 'Carsten'. The interface includes a top navigation bar with 'Projects', 'Create', and 'Page' tabs. A left sidebar contains 'General', 'Layout' (selected), 'Style', and 'Vanity URLs'. The main area displays a grid of available layouts, with the '1 column' layout selected and highlighted by a blue border. A notification banner at the top states: 'The layout has successfully been changed to the 1 column layout: This layout has one column taking up 100% of the available space.' Below the layout grid, a section titled 'Items hidden for current layout - 3' lists three portlets: 'Carsten's CharacterSet Portlet', 'DOJO Portlet', and 'LocalizedContextPortlet'. At the bottom of the page, there are links for 'Product documentation', 'Support page', 'Search Center', 'Product wiki', 'Supported hardware and software', and 'Training & Rating'.

Published Site Edit Mode: ON Menu

Carsten

General

Layout

Style

Vanity URLs

The layout has successfully been changed to the 1 column layout: This layout has one column taking up 100% of the available space.

Current Layout: 1 column

Top column 2 column unequal

Top column 3 column center

1 column

2 column equal

2 column right

2 column left

3 column center

3 column equal

2 grid

1 grid 2 column unequal

1 grid 3 column equal

Items hidden for current layout - 3

Carsten's CharacterSet Portlet

DOJO Portlet

LocalizedContextPortlet

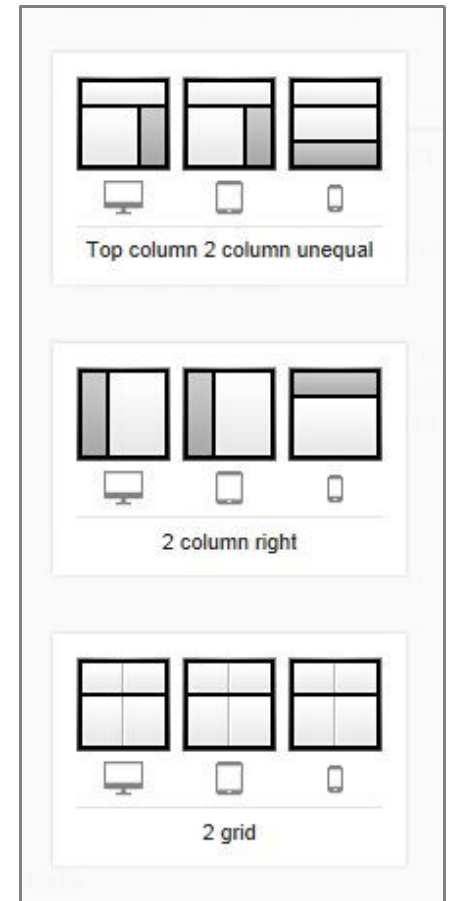
Add All To Page Remove All

Product documentation Support page Search Center

Product wiki Supported hardware and software Training & Rating

## Page > Layout: Key Concepts

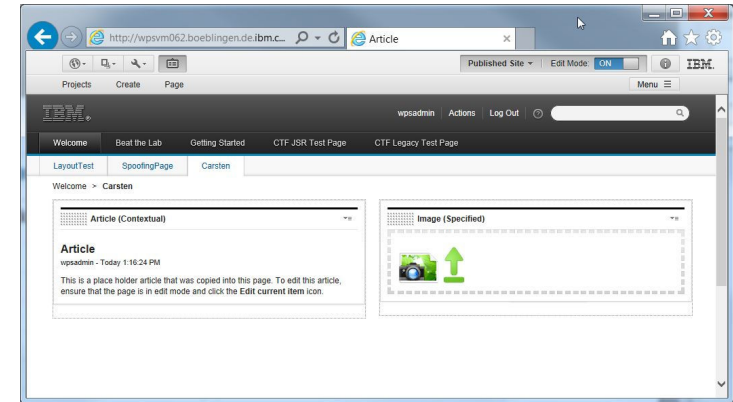
- **Efficiently** tryout different layouts for your page
  - One-click solution
  - Switching between layouts does NOT rearrange portlet (painless and predictable)
- **Easy** fixup of portlet orphans
  - Drag & Drop
  - Context button
  - Keyboard
- **WYSIWYG**
  - All change are available with full context, immediately
  - Schematic layout preview for responsive layouts
  - Full **project** support



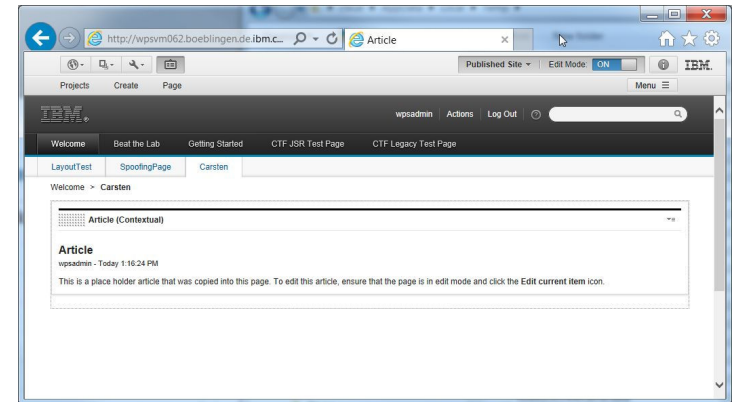
## What are Portlet Orphans?

- Clicking a layout immediately changes the layout of the page (WYSIWYG)
- However portlets are not reordered
  - Why? To make it lossless to go back to the original layout
- If the new layout has less columns or rows than the previous layout, some portlets might not be rendered
- Portlets on the page, currently not rendered because of the selected layout are “orphans”.

### 2-column Layout

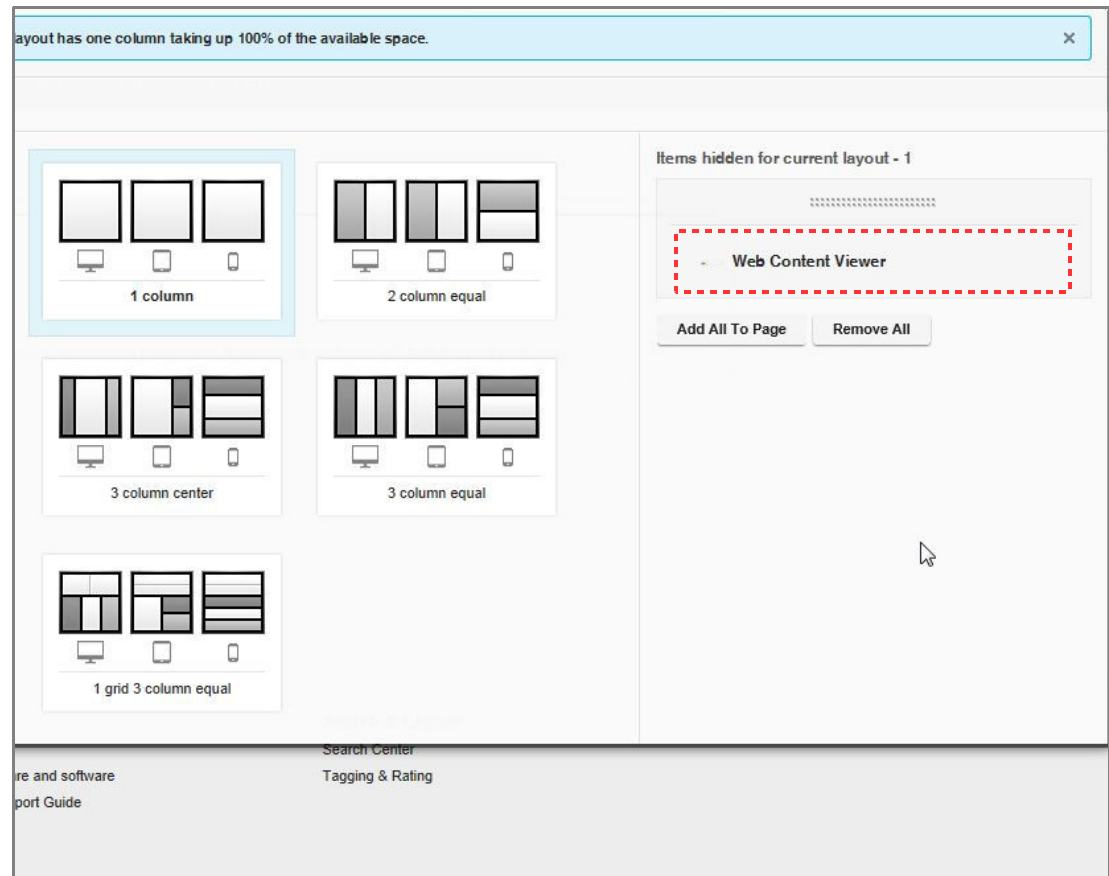


### 1-column Layout



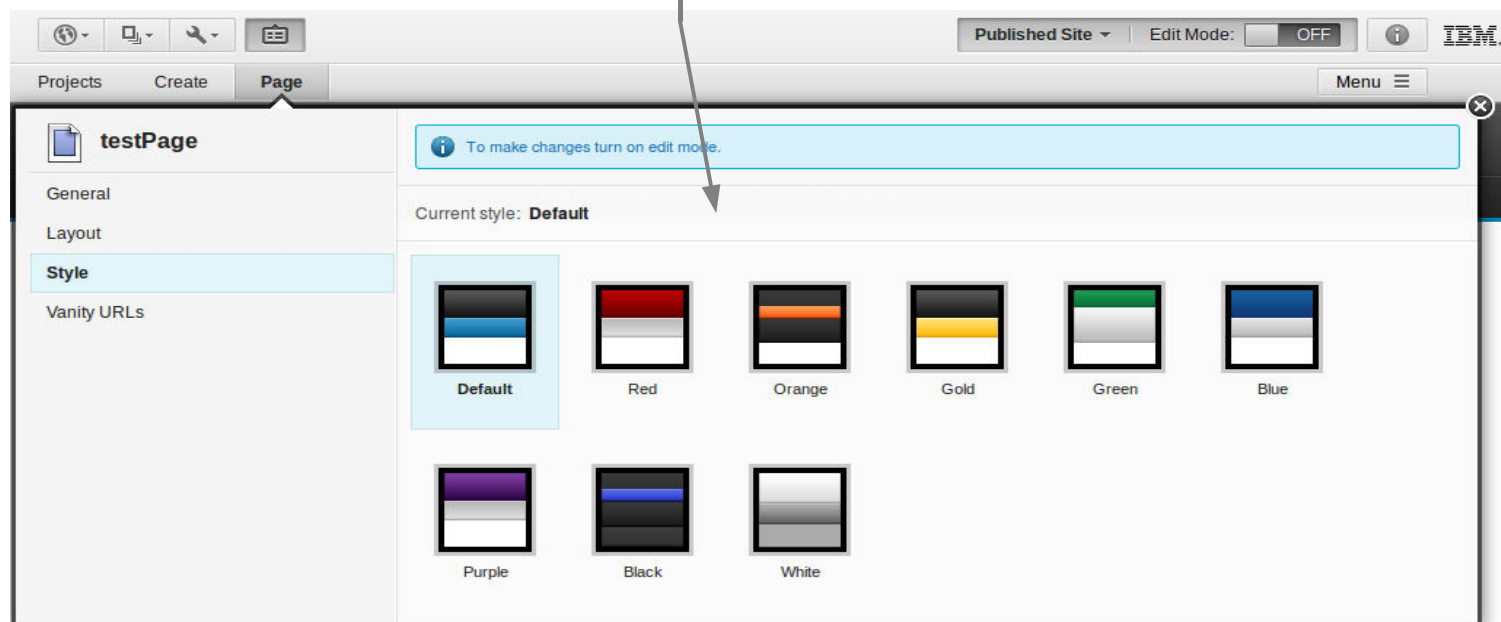
## How to deal with Portlet Orphans?

- Orphans are visualized clearly in groups
- They can be added to other columns or deleted
- Or they can just stay where they are



# Page > Style

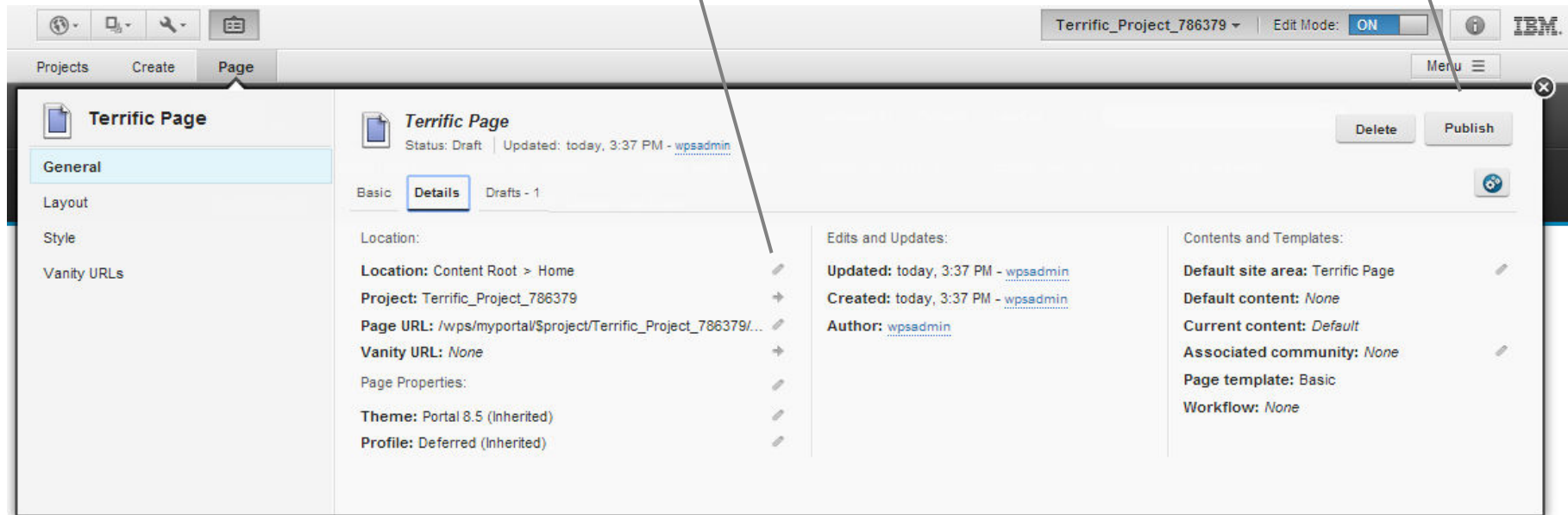
List of available styles  
typically defined in the theme  
of the underlying page



# Page > General

**Page location**  
To move a page, edit its location

**Page workflow actions** that are applicable in the current context



- Clicking an editable property (pencil icon) opens a pop-up dialog
- Drafts tab is offered if there are any draft versions in (other) projects
- Drafts tab only available in advanced mode

## Vanity URLs

- URLs which can be easily defined and managed by business users
  - Managing them does not require admin role or access to portal admin pages
  - A portal page can have multiple vanity URLs
  - Resolved to a full portal URL (redirect)
- URL format

```
http[s]://<hostname>:<port>/wps/vanityurl/<vanity-url-name>
```

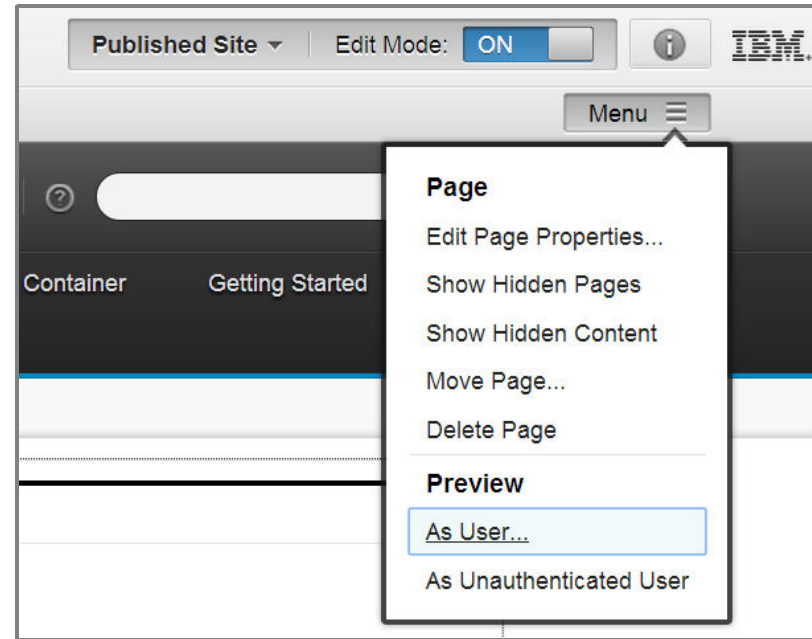
- You can shorten them using HTTP server rewrite rules,  
e.g. **http://www.ibm.portal.com/t3education**
- Beyond that, vanity URLs...
  - are stored in the portal page site areas and syndicated along with them (requires Managed Pages to be enabled)
  - can be locale-specific, i.e. they can address a page in a specific locale
  - can address specific WCM context

# Page > Vanity URLs

The screenshot shows the IBM Software interface for configuring vanity URLs. The top navigation bar includes 'Published Site', 'Edit Mode: ON', and the IBM logo. The left sidebar shows 'Projects', 'Create', and 'Page' tabs, with 'Vanity URLs' selected under the 'Page' tab. The main content area is titled 'Vanity URLs for "Welcome"' and includes a 'Show: All Languages' dropdown. A list of vanity URLs is displayed for various languages: German (willkommen), French (bienvenue), Italian (benvenuto), Russian (приём), and English (welcome). A hand-drawn callout points to this list, stating: 'List of vanity URLs that are associated with the underlying page incl. control for filtering per language'. To the right, the 'Add Vanity URL' panel contains fields for 'Vanity URL Name', 'Content Language' (set to 'Site Visitor Language'), and 'Web Content' (with options for default, current, or specified content). A 'Save' button is at the bottom. A second hand-drawn callout points to this panel, stating: 'Form for creating new or editing existing vanity URLs'.

## More Menu

- Additional page-specific functions
- Preview functions
  - Preview as user
  - Preview as unauthenticated user



# Information Mode

- New core concept to provide inline help information and deep links to external documentation
- You can exploit this feature in custom code (e.g. in themes or portlets)
- Mapped to a public render parameter (public API)

Information mode toggle  
to activate information mode

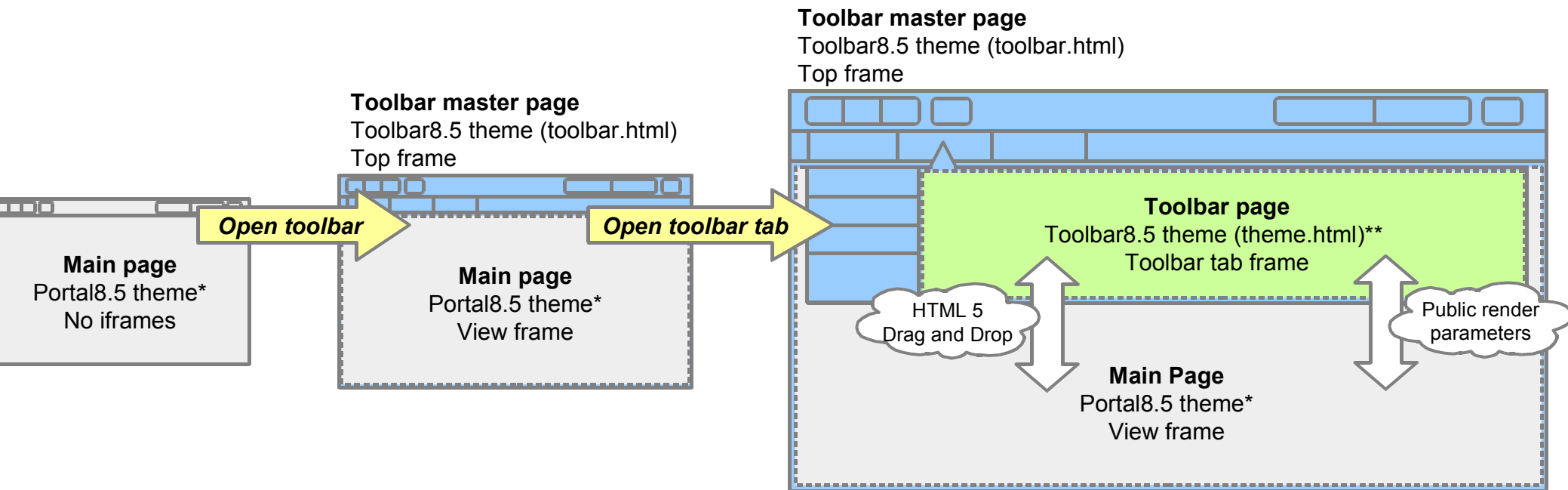
The screenshot shows the 'Page Settings' dialog in the IBM WebSphere Portal. At the top right, there is a 'Published Site' dropdown, an 'Edit Mode: ON' toggle, and an 'Information Mode' toggle (represented by an 'i' icon). A red circle highlights the 'Information Mode' toggle, with a line pointing to the text 'Information mode toggle to activate information mode'. Below the dialog, a browser window shows the 'Content Author's Online Help' page for 'User assistance for content authors'. The 'Friendly URL name' section is highlighted, showing a tooltip that reads: 'Create human readable URLs. You must assign each page in the hierarchy a friendly URL name for the friendly URL path to work.' A red circle highlights the 'Learn more' link in the tooltip, with a red arrow pointing to the 'Learn more' link in the 'Page Settings' dialog. The 'Page Settings' dialog also has a 'Page title' field with a red circle around the '?' icon, a 'Friendly URL name' field, a 'Page insertion point' section with radio buttons for 'Last child of current page', 'Previous sibling of current page', and 'Next sibling of current page', and an 'Advanced Settings' section with a 'Unique name' field and a red circle around the '?' icon.

# Architecture and Conceptual Design

## Conceptual Design – Basic Points

- **Goal:** Reuse well-known concepts
- **Separation** between toolbar and view theme using iframes
- **Administrative model** for toolbar tabs: Portal pages
  - Each toolbar tab is represented as a content page or content label
  - Visibility can be controlled using PAC or PZN
- **Programming model** for toolbar tabs: Portlets
  - Toolbar tab content is implemented as portlets
  - Each tab can have one or multiple portlets
  - Context sharing between toolbar and view theme is based on public render parameters
  - Framework makes sure that public render parameters are synchronized between toolbar tab and main page
- **Drag-and-drop** interactions are based on HTML 5 Drag & Drop

# Conceptual Design – iFrame Separation



**Toolbar tabs (toolbar pages)**

**Public render parameters**

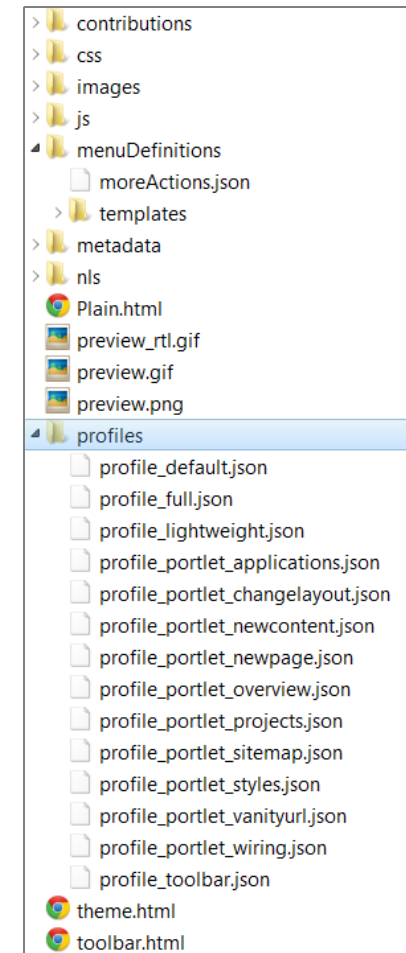
**HTML 5 Drag and Drop**

**Toolbar page displayed in toolbar tab frame**

**Main portal page displayed in view frame**

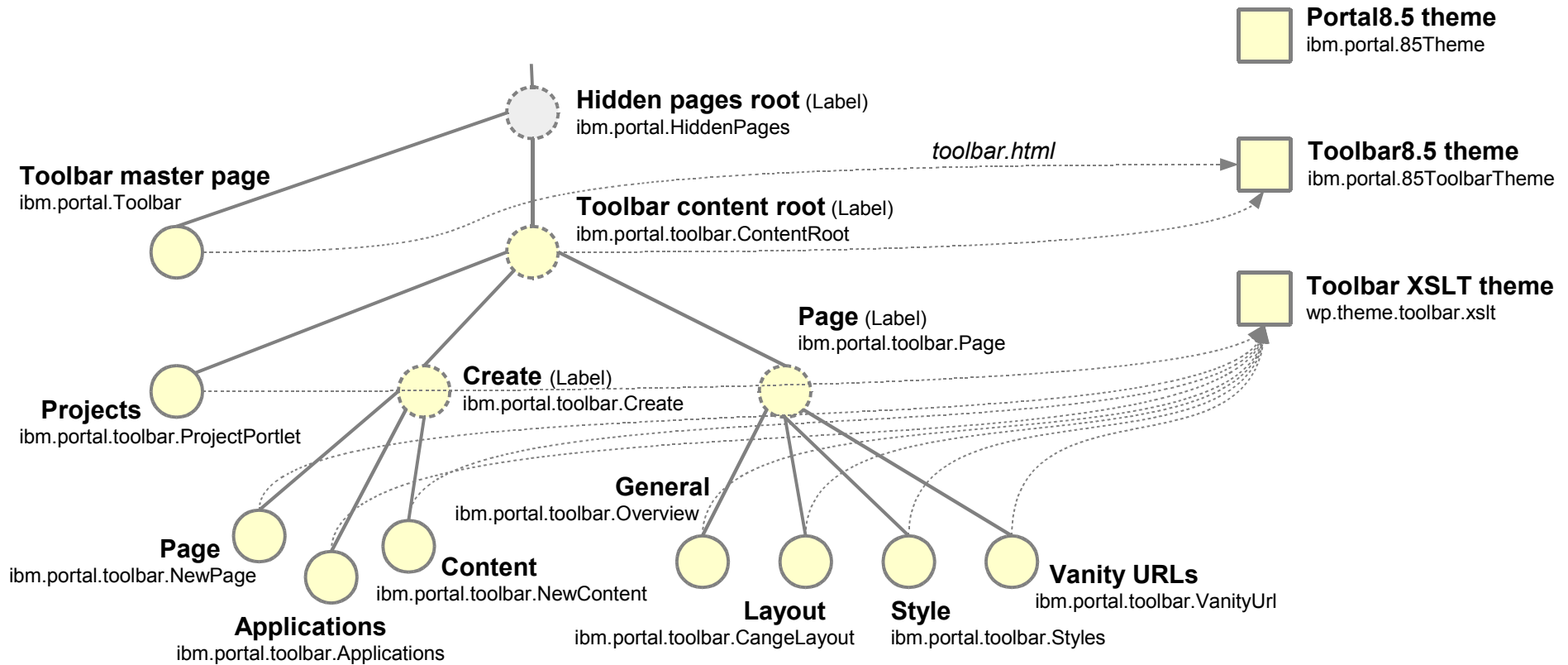
## The Toolbar8.5 Theme

- The **authoring theme** or **editing theme**
  - Counterpart of the view theme
  - Provides authoring and editing capabilities (theme profiles, theme modules, dyn spots, pages, portlets)
- Two HTML templates
  - toolbar.html
    - Defines the look and feel of the toolbar navigation (everything that “lives” in top frame)
    - Implements the separation of view and editing artifacts using iframes
    - Only used for toolbar master page (see next slide)
  - theme.html
    - Defines the look and feel of toolbar pages that are loaded into the toolbar tab frame



/wps/mycontenthandler/dav/fs-type 1/themes/Toolbar8.5

# Toolbar Pages and Themes



## Drag and Drop

- Based on HTML 5
- Draggable items identified using URIs and parameters
- Client-side drop handler passes URI and parameters to server-side drop handler framework (POST request)
- Server-side framework interprets URI and invokes specific drop handler
- Plug point for integrating custom drop handlers

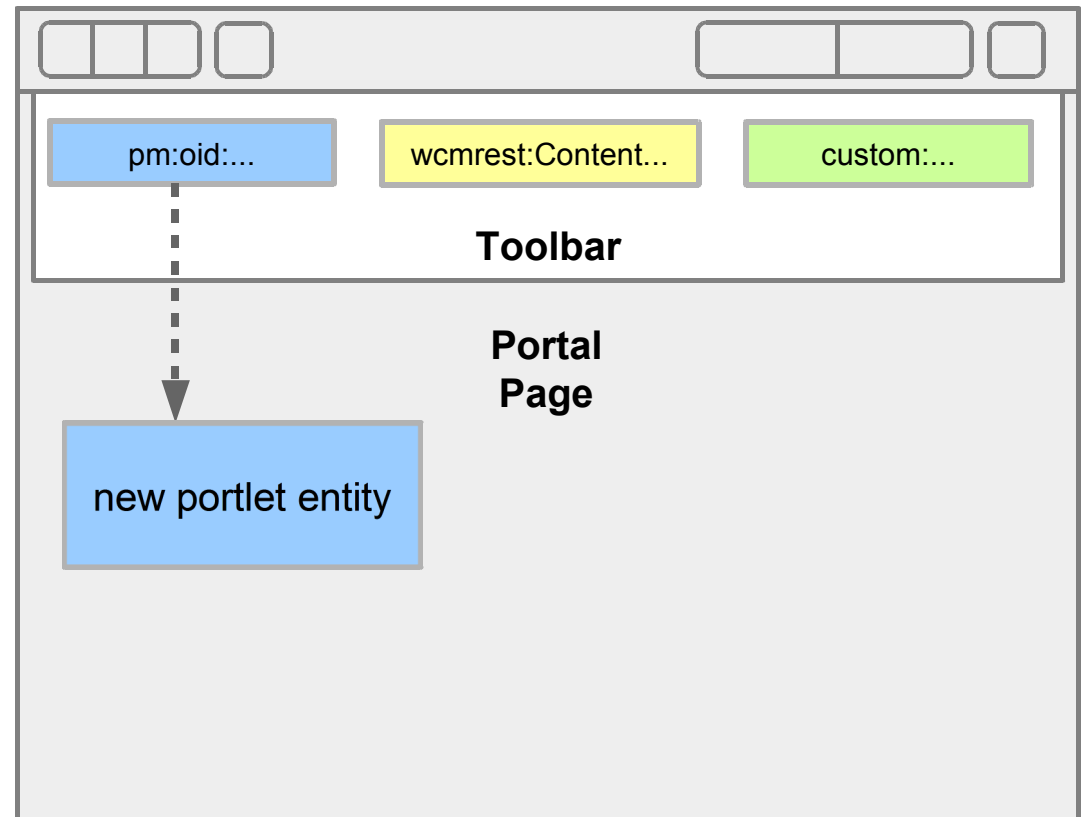
```
<ul class="iconView">
  <li id="contentListItem-ATCQJGAMQaEKa"
      class="iconViewElement">
    <a id="contentItem-link-ATCQJGAMQaEKa"
        href="..."
        class="dragarea"
        title="Blog"
        ondragstart="..."
        ondragend="..."
        data-uri="wcmbw:id:copylibrary"
        data-param-contentpath="/Blog/Home"
        data-param-blogname="Blog"
        data-param-resourcetype="Blog Solo Template v70"
        draggable="true" ...>
```



## Drag and Drop: Create > Applications

### Drop handler

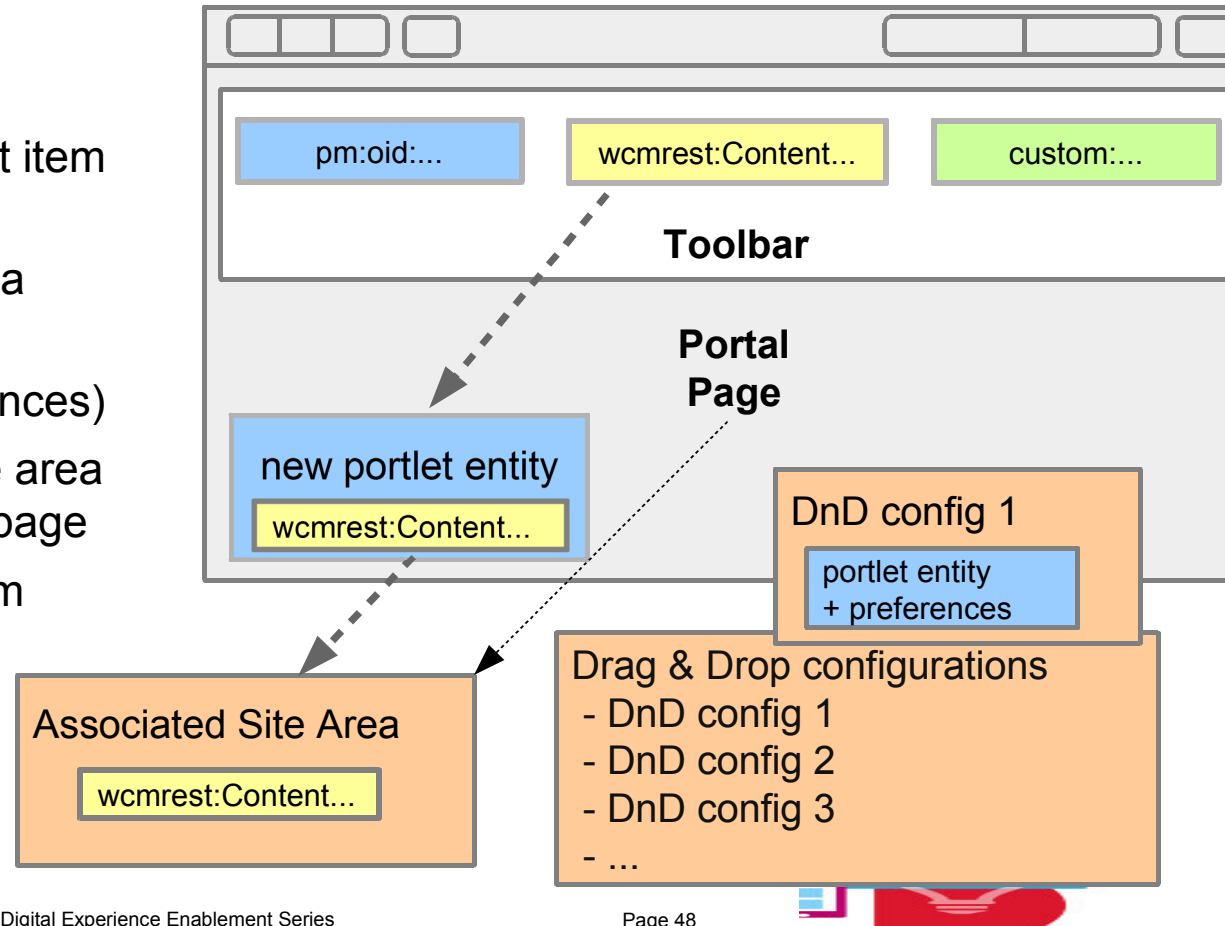
- 1) Receives URI that references
  - a portlet definition,
  - a portlet entity, or
  - a resource model entity
- 2) Creates new portlet entity
  - e.g. by cloning the given one
- 3) Adds new entity to the page



## Drag and Drop: Create > Content

### Drop handler

- 1) Receives URI that references content item
- 2) Retrieves associated drag & drop configuration (= a page containing a portlet entity)
- 3) Clones the portlet entity (incl. preferences)
- 4) Clones content and adds it to the site area that is associated with the current page
- 5) Makes portlet point to the content item
- 6) Adds it to the page



# Customization

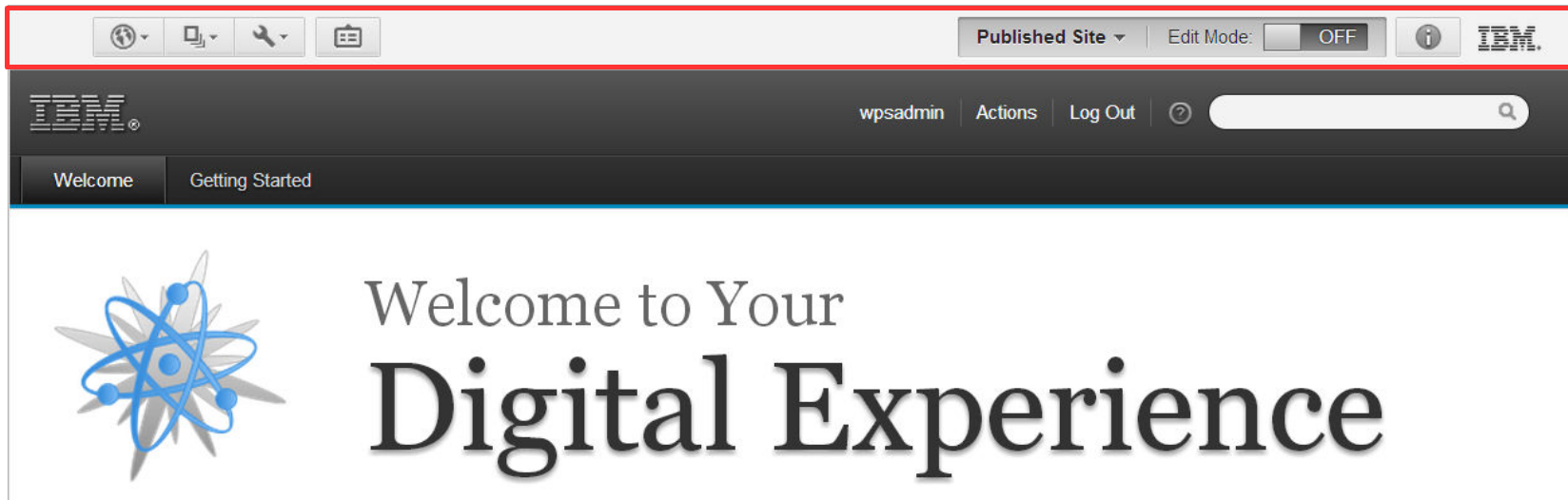
## Customizing the site toolbar

- Only specific customizations are supported (in particular for migration)
- Mainly around extending the toolbar
- Customization use cases
  - Embedding the toolbar into a custom theme
  - Adding web content and creating a Drag & Drop configurations
  - Adding applications and managing application categories
  - Adding styles and layouts
  - Creating custom toolbar tabs



• Migrating > Planning for migration > Supported toolbar customization

## Embedding the toolbar into a custom theme



## Embedding the toolbar into a custom theme (2)

- **Prereq:** Theme must be a modular theme
- **Option 1:** Dynamic content spot + theme module
  - Add toolbar content spot to theme HTML
  - Add toolbar module(s) to theme profile(s)
  - Invalidate resource aggregator cache  
Theme Analyzer > Utilities > Control Center > Invalidate Cache
- **Option 2:** Theme module only
  - Add toolbar module to theme profile(s)
  - Invalidate resource aggregator cache  
Theme Analyzer > Utilities > Control Center > Invalidate Cache

Option 1 provides an optimized user experience (no flickering effects)

?

Option 2: Easy integration w/o touching theme HTML templates



• 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

## Toolbar Theme Modules

- **wp\_toolbar\_host**
  - Top level module of the toolbar
  - Supports view mode and edit mode
  - Integration through dynamic content spot (→ option 1)
- **wp\_toolbar\_host\_view + wp\_toolbar\_host\_edit**
  - Two top level modules, one for view mode, one for edit mode
  - Recommendation is to add the edit module to the deferred section of the theme profile
  - Integration through dynamic content spot (→ option 1)
- **wp\_toolbar\_host\_dynamic**
  - Top level module of the toolbar
  - Supports view mode and edit mode
  - Integration through dynamic markup contribution (→ option 2)

```
{ "moduleIDs" : [  
    "getting_started_module",  
    "wp_toolbar_host",  
    ...  
]}
```

```
{ "moduleIDs" : [  
    "getting_started_module",  
    "wp_toolbar_host_view",  
    ...  
],  
  "deferredModuleIDs": [  
    "wp_toolbar_host_edit",  
    ...  
]}
```

```
{ "moduleIDs" : [  
    "getting_started_module",  
    "wp_toolbar_host_dynamic",  
    ...  
]}
```

## Toolbar Dynamic Content Spot

- The modules “wp\_toolbar\_host” and “wp\_toolbar\_host\_view” define a dynamic content spot “**85toolbar**”

```
<div class="wpthemeFrame">
  <header role="banner">
    <a rel="dynamic-content" href="dyn-cs:id:85toolbar"></a>
    ...
```

- To control the visibility of the toolbar based on device classes, it is recommended to use a theme-specific “proxy content spot” instead
  - The Portal 8.5 theme defines a spot “**85theme\_toolbar**”

```
<contribution type="dyn-cs">
  <sub-contribution type="markup" ref-id="85theme_toolbar">
    <uri value="mvc:dyn-cs:id:85toolbar,smartphone@,tablet@"/>
  </sub-contribution>
  ...
```

## Removing the “old” toolbar from an 8.0 theme

- Before adding the new site toolbar you need to remove the old one
- Procedure
  - Remove the theme modules of the 8.0 site toolbar from the theme profiles
  - Remove the dynamic content spots of the 8.0 site toolbar from the theme HTML templates
  - Clean up menu definitions
  - Clean up system descriptors
- Details in documentation



• Migrating > Next steps > Enabling new functionality in a migrated portal>Enabling new functionality in migrated themes >  
Migration - Removing the site toolbar in an 8.0 theme

## Customizing the Create Content tab

- Adding web content to the Create Content tab
- Creating Drag & Drop content configurations



## Adding site areas to the top level view

- The top level view of the Create Content tab displays site areas
- Content authors can drill down into the site areas
- Two options to define the site areas that are shown
- **Option 1:** Adding a keyword to a site area
  - Annotate the site area with the keyword “ibm.portal.toolbar.NewContent”
  - Web content authoring UI
- **Option 2:** Adding a content association (aka “web content mapping”) to the Create Content tab
  - Edit the Create Content page
  - Create a new association



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

## Content Drag & Drop Configurations

- The content items displayed on the Create Content tab act as templates
- When added to the page,
  - the item is copied and
  - a web content viewer portlet is added to the page.
- Predefined configurations can be found under *Content Root > Hidden Pages > DnD Configuration*
- Content drag & drop configurations
  - Are portal page templates with single portlets on them
  - When dropping a content item to a page, the corresponding portlet entity is copied to the page, together with all of its preferences
  - Can be set on site areas or single content items
  - The applicable configurations are listed on the Configuration tab inside the Create Content tab



• Setting up a website > Preparing for content authors > Site toolbar preparation > Create Content Drag and Drop configurations

## Create a new Content Drag & Drop Configuration

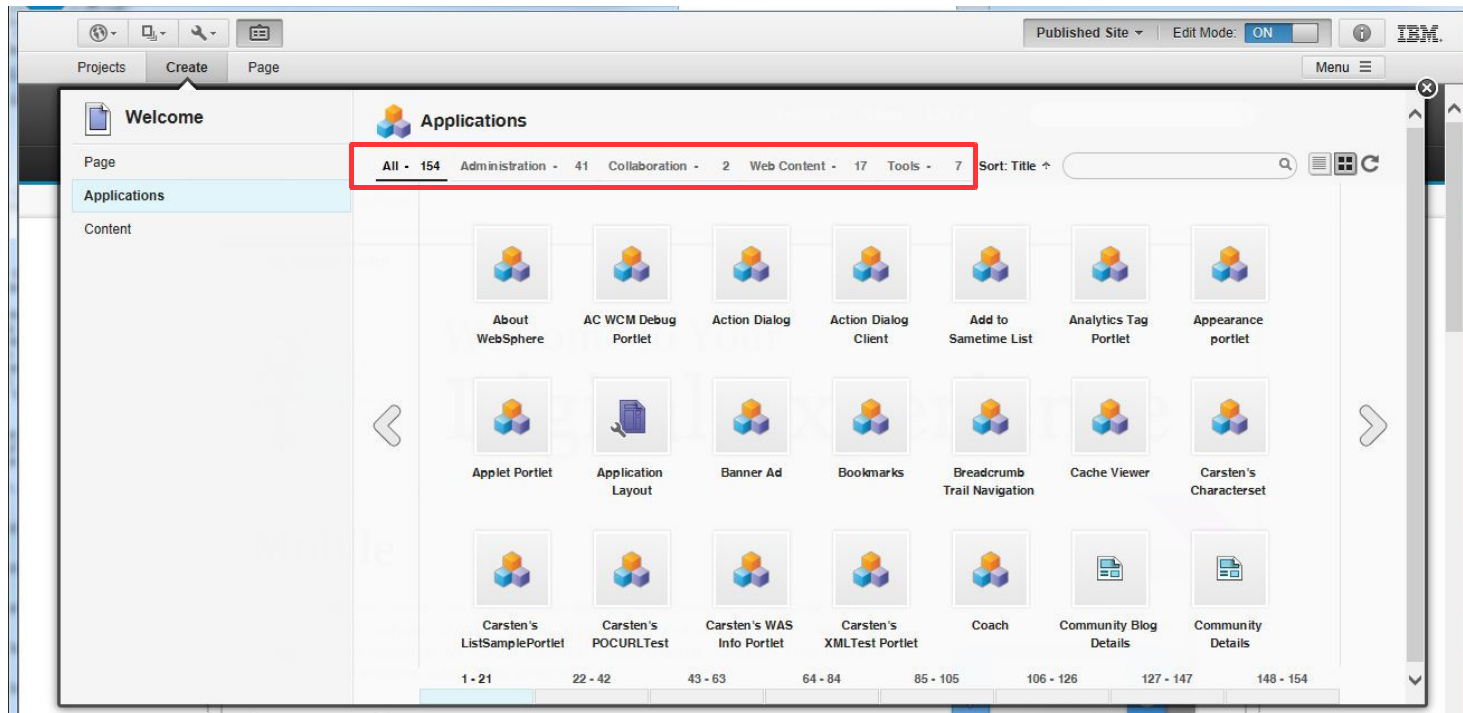
- Create a new page under  
*Content Root > Hidden Pages > DnD Configuration*
- Add a Web Content Viewer (JSR 286) portlet the page
- Edit the shared settings of the portlet
- Set the preferences for the new configuration



• Setting up a website > Preparing for content authors > Site toolbar preparation > Create Content Drag and Drop configurations

## Customizing the Applications tab

- How to add /remove portlets to existing application categories
- How to manage application categories



## Managing Application Categories

- **Principle:** Reuse well-known management concepts for resources
- Categories are managed as standard **Labels** or **URLs** under *Content Root > Hidden Pages > Application Categories*
- Use the standard authoring UI to modify, delete, create categories
- **Labels**
  - The label represents the category
  - For each application, create a child page for this label; the name of this page becomes the name of the application
  - Put one portlet onto the child page and configure it as desired
  - This is used as a template for the new application



• Setting up a website > Preparing for content authors > Site toolbar preparation > Customize the Create Applications tab

## Managing Application Categories (2)

- **URLs**

- The URL node represents the category
- It points to a URI that represents an ATOM feed
- Each entry in this ATOM feed represents an application for this category
- Supported entry types are
  - Portlet definitions
  - Portlet entities

- Supported entry types are

- Resource references (tagging)

- Example:

- `rm:empty?tmp=tm%3aname%3acom.ibm.portal.addcontent.category.admin`

- **Advantage**

- Flexible, programmatic configuration
- Select from a rich set of existing ATOM feeds
- or Create custom feeds using custom selection criteria



• Setting up a website > Preparing for content authors > Site toolbar preparation > Customize the Create Applications tab > Using external URLs

## Predefined Application Categories

- **All**

- All portlets  
(access control filtered)

- **Administration**

- Portlets tagged with  
*com.ibm.portal.addcontent.category.admin*

- **Collaboration**

- Portlets tagged with  
*com.ibm.portal.addcontent.category.collab*

- **Web Content**

- Portlet with metadata  
*com.ibm.portal.wcm.copy.contents=true*

- **Tools**

- Portlets tagged with  
*com.ibm.portal.addcontent.category.tools*

All predefined categories  
are based on ATOM feeds

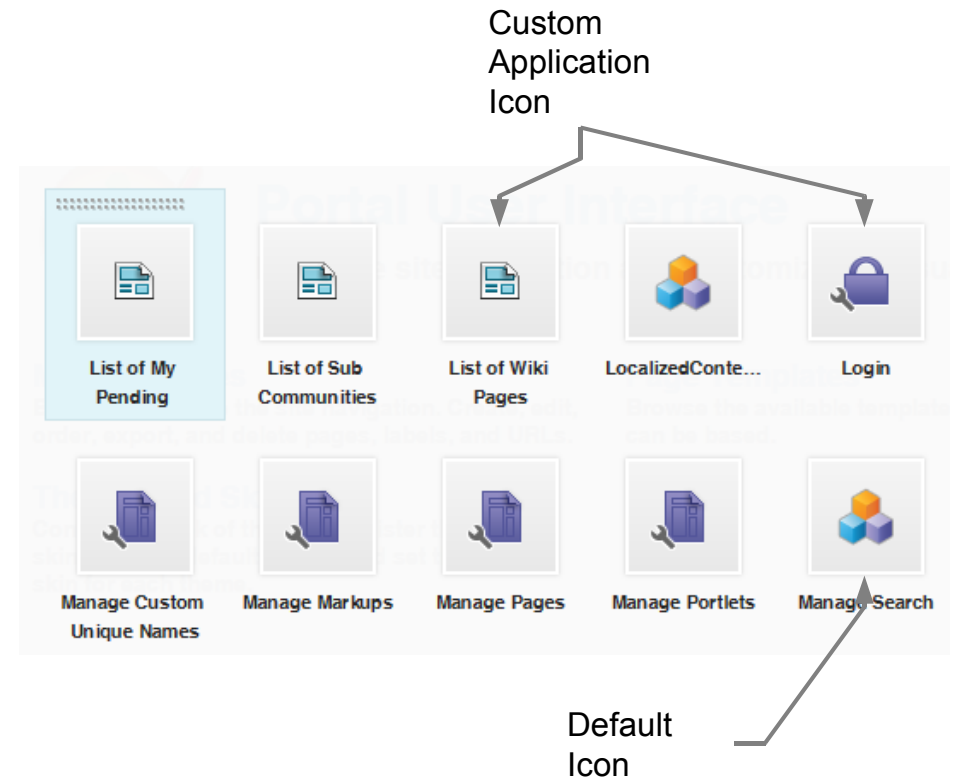


## Adding Applications to Predefined Categories

- The “**All**” category automatically shows all available applications
- **Tagging based categories**
  - Add the tag that the category is configured to, to the portlet definition (XMLAccess)
  - Details see Info Center
- **Portlet Model based categories**
  - Driven via metadata on the portlet definition
  - Edit the metadata, e.g. via the admin UI or XMLAccess

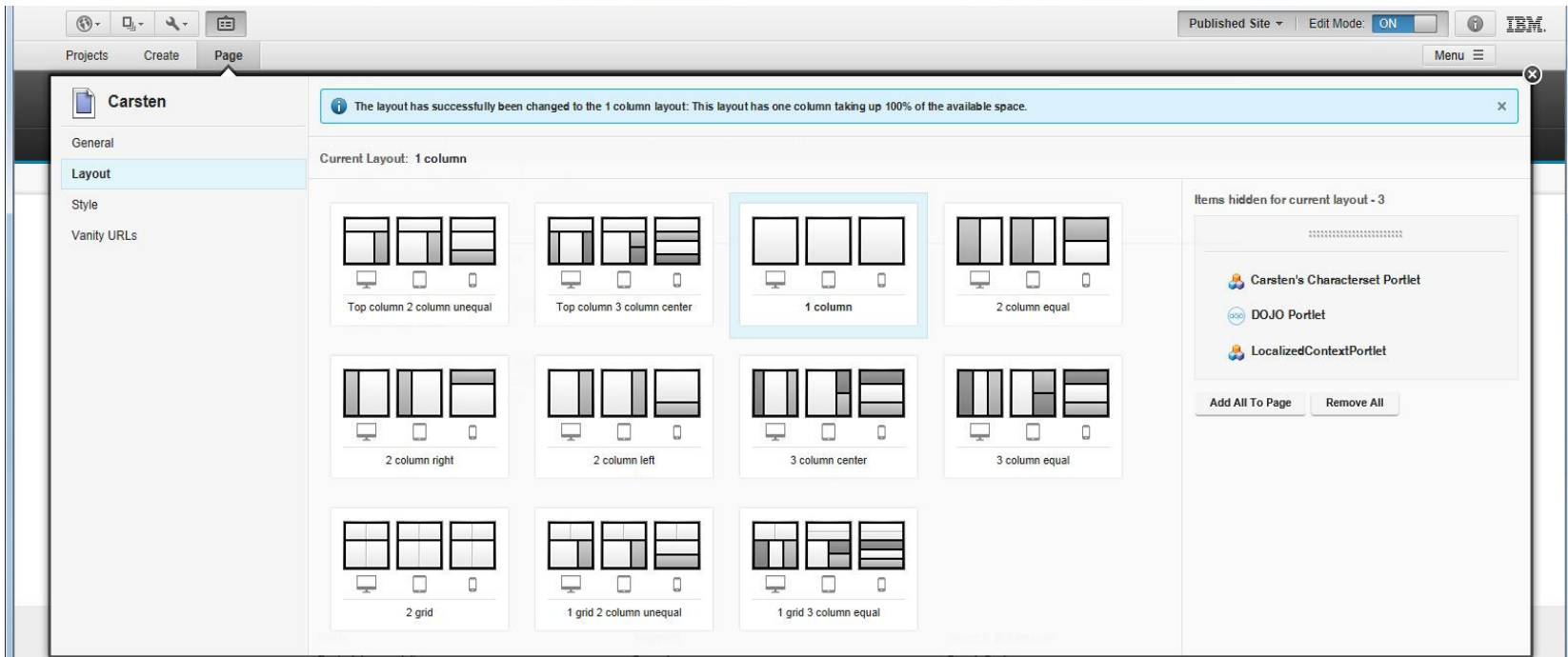
## Rich Icon Support

- Each Application can package a custom icon
- Support for ...
  - multi scale icons (e.g. hires for Retina displays)
  - different icons per locale or text direction
  - scaled automatically if required
- Fallback to a nice default icon if no other is provided



# Customizing the Page Layout tab

- How to add /manage layouts
- How to add custom layout descriptors

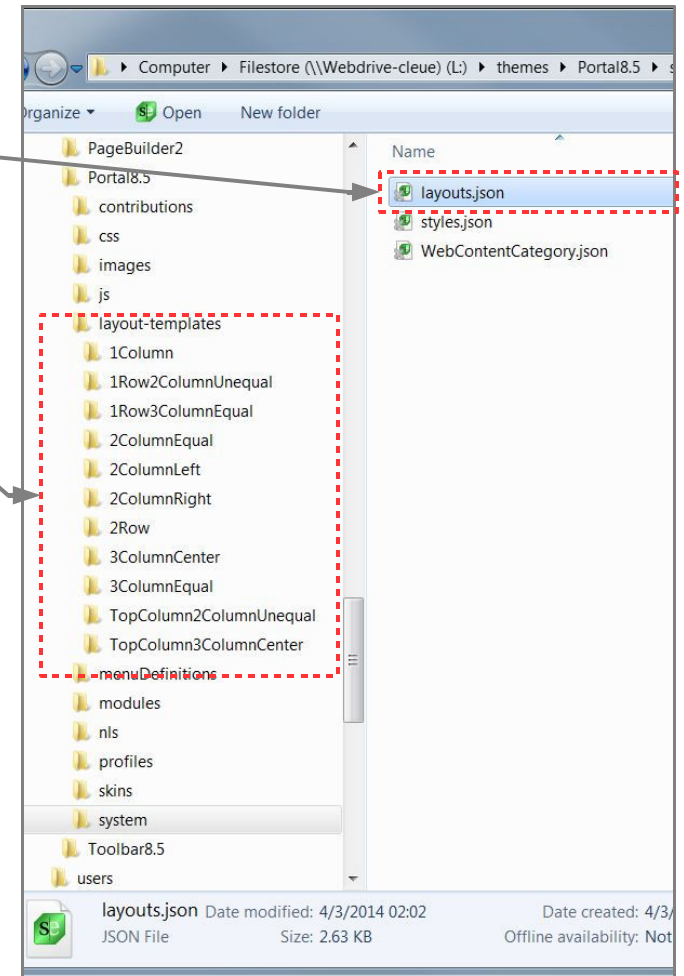


## Managing Layouts

- **Principle:** Stay compatible with previous releases to ease migration
- By default, the available layouts are packaged with the theme
  - JSON like descriptor points to layout templates
  - Typically edited via WebDAV

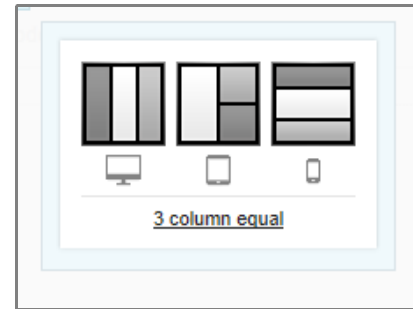
Descriptor

Templates



## Adding Custom Layouts

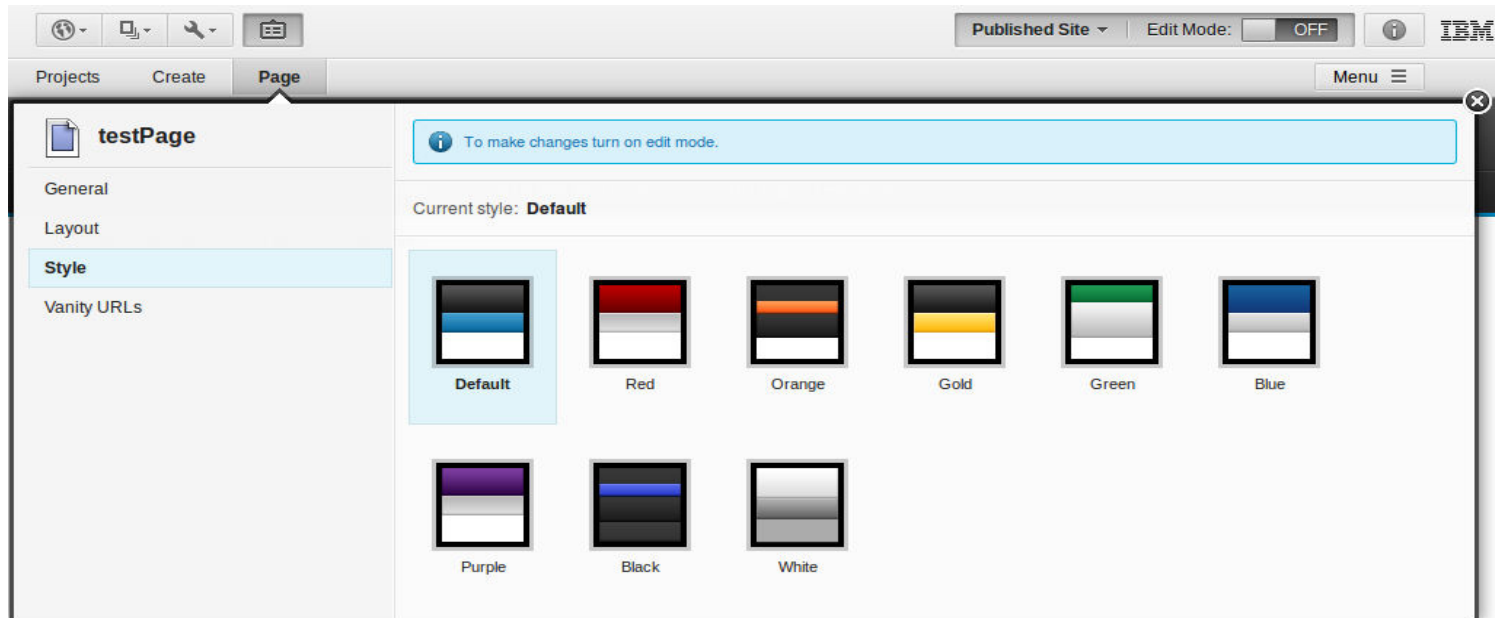
- Support for more than one layout descriptor per theme
  - Useful for a modular theme or layouts added by external components
  - Extra descriptors are listed as theme metadata
- Schematic layout preview for responsive layouts



• Setting up a website > Preparing for content authors > Site toolbar preparation > Adding new styles or layouts from an outside component

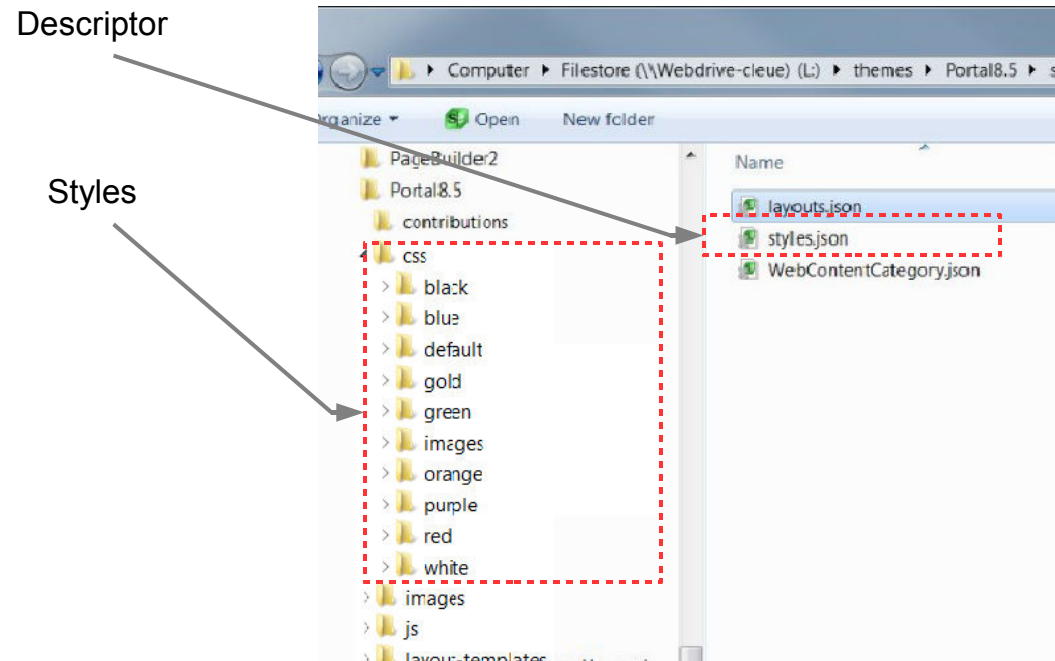
## Customizing the Page Style tab

- How to add /manage styles
- How to add custom style descriptors



## Managing Styles

- **Principle:** Stay compatible with previous releases to ease migration
- By default, the available styles are packaged with the theme
  - JSON like descriptor points to layout templates
  - Typically edited via WebDAV



## Adding Custom Styles

- Support for more than one style descriptor per theme
- Useful for a componentized theme or styles added by external components
- Extra descriptors are listed as theme metadata



• Setting up a website > Preparing for content authors > Site toolbar preparation > Adding new styles or layouts from an outside component

## Creating custom toolbar tabs

1) Create a **content page** or **content label** and append it to /under *Content Root > Hidden Pages > Toolbar Content Root*

- Two nesting levels are supported

2) Configure the toolbar page

- Mandatory parameter

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

Parameter is needed to enable intercommunication with the main page; for performance reasons it has to be set on every single toolbar page

- Optional parameters

3) Add content to the tab

- Implement a portlet and add it to your toolbar page



- Setting up a website > Preparing for content authors > Site toolbar preparation
- Setting up a website > Preparing for content authors > Site toolbar preparation > Configuring the behavior of toolbar tabs
- Setting up a website > Preparing for content authors > Site toolbar preparation > Implementing portlets for the site toolbar

## Implementing toolbar portlets

- 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



- Setting up a website > Preparing for content authors > Site toolbar preparation > Implementing portlets for the site toolbar
- Developing > Developing portlets > Predefined public render parameters

## How to enable /disable related features

- Managed pages

- Can be enabled /disabled via config task

```
./ConfigEngine.sh enable-managed-pages  
./ConfigEngine.sh disable-managed-pages
```

- If disabled, the Projects tab, the Vanity URLs tab, and the project menu are hidden
- Requires server restart

- Vanity URLs

- Can be enabled /disabled via config task

```
./ConfigEngine.sh enable-vanityurl-support  
./ConfigEngine.sh disable-vanityurl-support
```

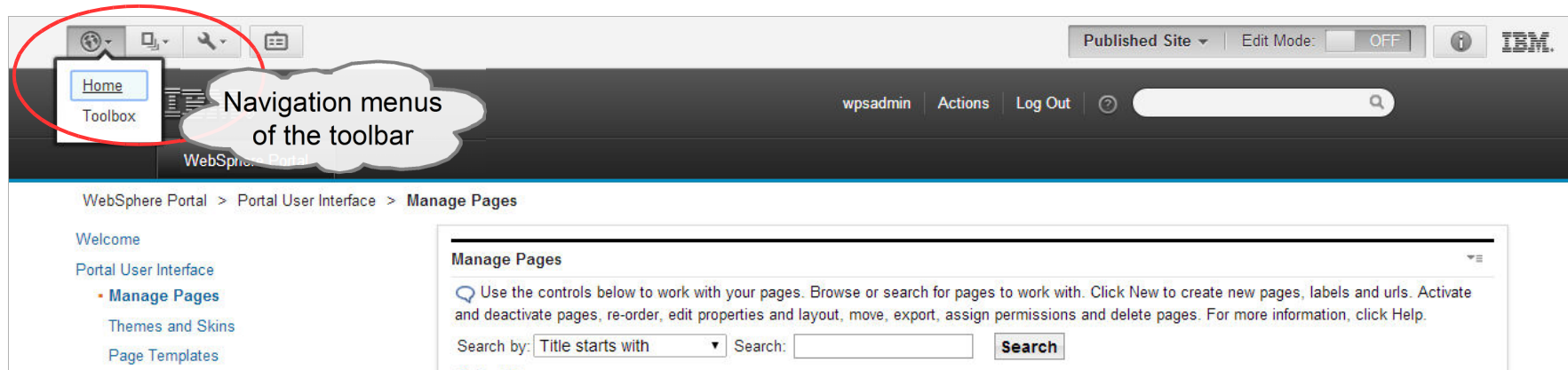
- If disabled, the Vanity URLs tab is hidden
- Requires server restart



- Configuring > WebSphere Portal > Configuring managed pages > Enabling managed pages
- Setting up a website > Pages>Managed pages > Vanity URLs > Administering vanity URLs > Enabling vanity URL support

## Migration Aspects

- **The site toolbar is installed during migration**
  - As part of the migration task that deploys the Portal8.5 theme
- Why is that?
  - Administration pages are based on the Portal8.5 theme
  - The Portal8.5 theme relies on the site toolbar because it does not have a top navigation (only displayed on smartphone and tablet)

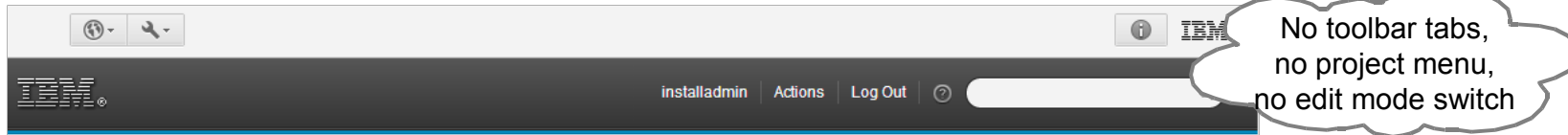


## Migration Aspects (cont.)

- After migration, the site toolbar is fully enabled for the default virtual portal only – for all other virtual portals it has to be “installed” separately

```
./ConfigEngine.sh install-toolbar -DVirtualPortalContext=<virtualportalname>  
-DWasPassword=<password> -DPortalAdminPwd=<password>
```

- A Portal85 page in a newly created VP will look like this:



- Background information: The top bar is rendered using a dynamic content spot which is not scoped to virtual portals



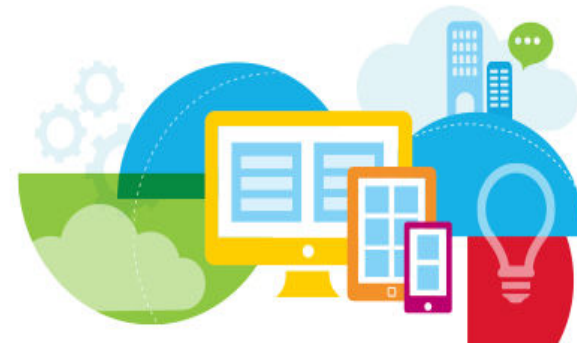
- Migrating > Planning for migration > What to expect after you complete migration > Site toolbar
- Migrating > Next steps > Enabling new functionality in a migrated portal > Enabling new functionality in migrated themes > Enabling the 8.5 site toolbar

## Key Messages

- Toolbar is decoupled from the view theme and can be **used with any modular custom theme**
- Toolbar can be **customized** easily by business users
- Toolbar can be **extended** using common concepts

## Toolbar live on stage

- Visit us!
  - **IBM Digital Experience Conference 2014**  
Anaheim, CA; July 21-24, 2014  
<http://www.ibm.com/software/collaboration/digitalexperience/event/>
  - **European Exceptional Digital Experience Meet the Lab**  
Boeblingen, Germany; May 13-14, 2014  
<http://xdxcloud.com/>
  - **DACH Exceptional Digital Experience Meet the Lab**  
Boeblingen, Germany; June 4-5, 2014  
<http://www-05.ibm.com/de/events/meetlab/>
  - **Impact 2014**  
Las Vegas, NV; April 27-May 1, 2014  
<http://www.ibm.com/software/websphere/events/impact/>
- ... or contact us directly!



## For More Information

### **IBM Digital Experience Solutions**

<http://www-01.ibm.com/software/collaboration/digitalexperience>

### **WebSphere Portal and IBM Web Content Manager Information Center Wiki**

<http://www-10.lotus.com/ldd/portalwiki.nsf/>

### **WebSphere Portal and Web Content Manager V.Next Beta**

<https://www14.software.ibm.com/iwm/web/cc/earlyprograms/lotus/portalopenbeta>

### **IBM Digital Experience Demonstrations:**

<http://www.youtube.com/user/IBMXWebX>

### **IBM Collaboration Services Business Solutions Catalog**

<https://greenhouse.lotus.com/catalog/>

# Backup Slides

# Adding web content to Create > Content tab (Option 1)

WebSphere Portal > Portal User Interface > Manage Pages

Welcome

Portal User Interface

- Manage Pages
- Themes and Skins
- Page Templates

Portlet Management

- Web Modules
- Applications
- Portlets
- Web Services
- Virtual Web Application Manager

Access

- Users and Groups
- Resource Permissions
- User and Group Permissions
- Credential Vault

Portal Settings

- Global Settings

**Manage Pages**

Use the controls below to work with your pages. Browse or search for pages to work with. Click New to create new pages, labels and urls. Activate and deactivate pages, re-order, edit properties and layout, move, export, assign permissions and delete pages. For more information, click Help.

Search by: Title starts with Search: toolbar **Search**

Select Page > Content Root > Hidden Pages > Toolbar Content Root > Create

**Pages in Create** Add, Edit, Delete, and Reorder pages

\* New Page \* New Label \* New URL \* New Page from...

Title	Unique name or Identifier	Status	
Page	ibm.portal.toolbar.NewPage	Active	▼ □ ✎ ↻ ✓ ⚙ 🗑
Applications	ibm.portal.toolbar.Applications	Active	▲ ▼ □ ✎ ↻ ✓ ⚙ 🗑
Content	ibm.portal.toolbar.NewContent	Active	▲ □ ✎ ↻ ✓ ⚙ 🗑

Page 1 of 1

Page 1 of 1

Unique Name:

ibm.portal.toolbar.NewContent

Friendly URL name:

newcontenttab

Theme:

XSLT Theme



Icon:

Aggregation - Render Mode:

This setting will revert to SSA during runtime if the theme assigned with the page does not support CSA.

- ☒ Inherit Parent Render Mode
- ☐ Client Side Aggregation - Rendering
- ☐ Server Side Aggregation - Rendering

+ Page Properties

+ Type of Page

+ Page Cache Options

- Advanced options

☐ This page has a list of allowed portlets.

[I want to set titles and descriptions.](#)

[I want to set parameters.](#)

Control Display through Rule Mapping

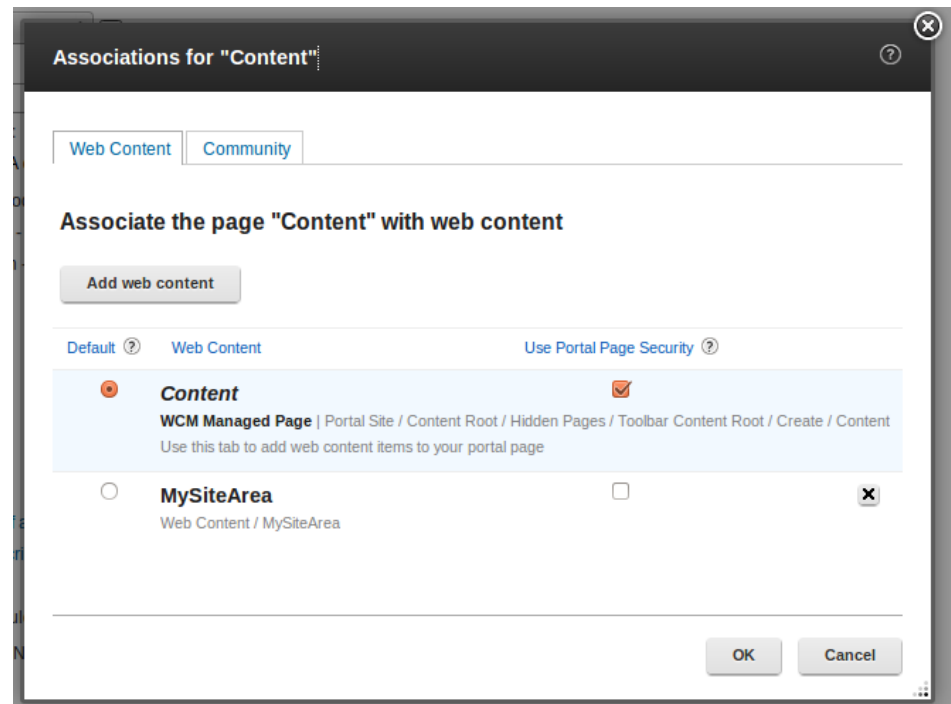
Show or Hide page rule: No rule mapped ▼

[I want to edit associations.](#)

OK Cancel

## How to add web content to Create > Content tab (Option 2)

- Click “Add web content”
- Select the site area you want to add
- Afterwards the site area will be listed as content mapping and will appear in Create > Content tab



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



## Create a new Drag & Drop configuration

- Create a new page under *Content Root > Hidden Pages > DnD Configuration*, next to the existing configurations
- Add a *Web Content Viewer (JSR 286)* portlet to the page
- Edit the shared settings of the portlet

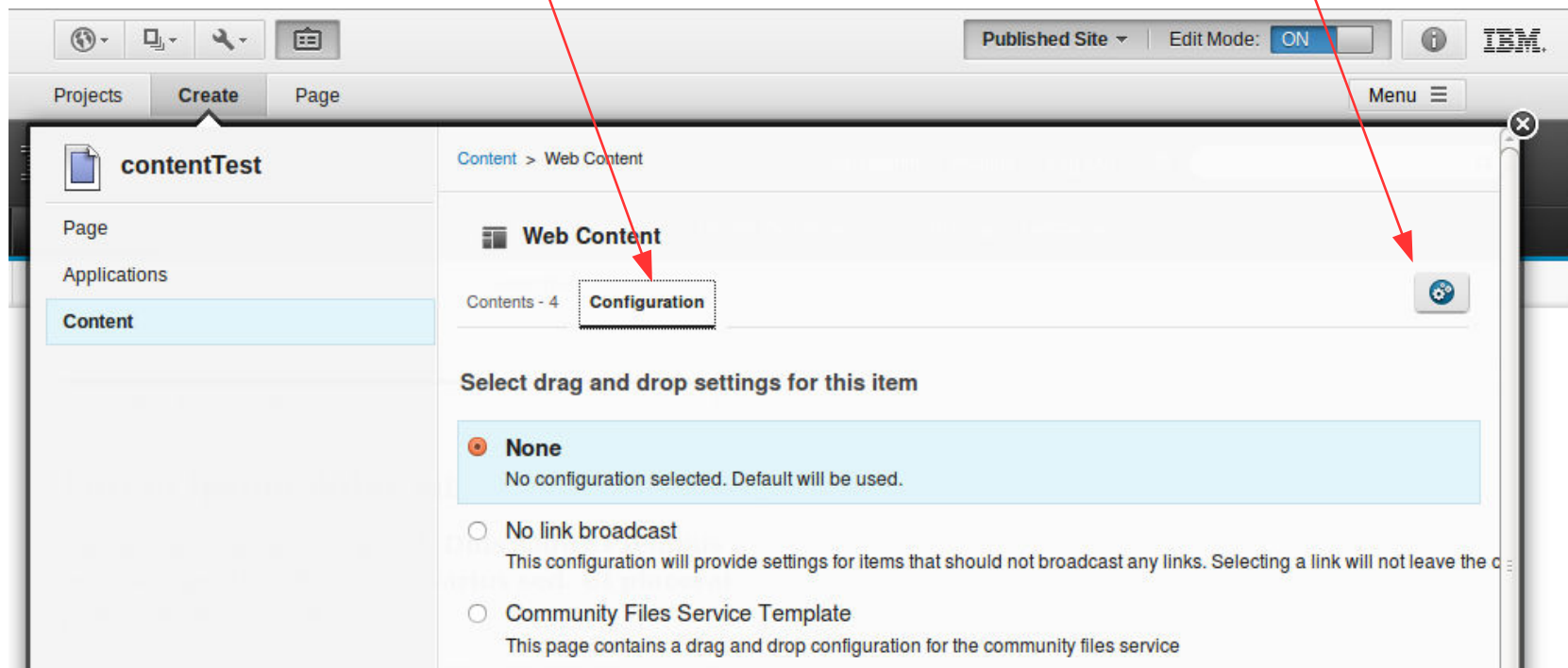


• Setting up a website > Preparing for content authors > Site toolbar preparation  
> Create Content Drag and Drop configurations



## Associate a Drag & Drop configuration with content

- To see the **Configuration** tab, you need to activate **advanced mode**



## Associate a Drag & Drop configuration with content

- In Create > Content, enable advanced mode and select Configuration
- Selected configuration will be applied when content is added to page
- Configuration can be associated with site areas or single content items

