



HDX-BU-200 Project Lab

HCLSoftware U

Creating a new generation of experts

Edition March 2024

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Introduction

This hands-on lab gets you started on the HCL Digital Experience (DX) platform and its project management capabilities. You will see how projects help you work with a team on several changes on your website, review and then publish them together.

In this DX back-office user lab, you will play the role of two Content Authors, Sara and Rose, who are going to team up to prepare several changes to the website of the fictitious Woodburn Stores company, review and then publish these in the future.



Sara Botello, Marketing Rep, based in Madrid (Spain)

Sara is a content author and will create the project, grant access to her content authors team and update the Home page.



Rose Bozli, Woodburn Stores Marketing Manager based out of Tokyo, Japan

Rose, the marketing manager of Woodburn Stores, will create a new Job page, review all changes of the project and publish it on a future date.

Prerequisites

1. Completion of previous HDX-Intro and HDX-BU-100 courses, including the optional labs. In HDX-Intro you get an introduction to Woodburn Stores, while in HDX-BU-100 you learn how to use the Site Manager.
2. Have a running DX instance on CF213 or newer. The lab is using the DX Solution Modules in HCL SoFy (<https://hclsofy.com/catalog/dx-solution-modules>) with its Woodburn Stores site. Note that if using your own instance, you will need to adjust the lab accordingly.
3. Access to download the Lab Resources:
In the same place where you have found this lab, you will find corresponding resources which you may download and unzip on your Desktop. This will help you run the lab more easily. You may later replace them with your own.

You will be using the following user IDs and passwords:

Purpose	User	Password
SoFy Login	Your official email id	Your password
SoFy Solution Console Login	sol-admin	<from SoFy solution>
DX Login Sara (Author)	sbotello	HCL-Dem0
DX Login Rose (Author)	rbozli	HCL-Dem0

Lab Overview

In this lab, you will explore various features of Projects from the perspective of an Author. Your team has been tasked to update the Home page of the Woodburn Stores site, create a new Jobs page and add some content to it. You will work on this as a team. Sara will take care of the Home page and Rose with the Jobs one. These changes need to be reviewed together and will be published together on a future date. Since there are several changes which need to be reviewed together, a project will be used to manage all these changes.

Part 1: Create a new Fall Update Project


As Sara, you will start by creating a new project and grant access to other content authors.

Access

	Administrator Defined	User Defined	Inheritance
User	Grant User Access None	Grant User Access None	<input checked="" type="checkbox"/> None
Contributor	Grant Contributor Access None	Grant Contributor Access None	<input checked="" type="checkbox"/> None
Editor	Grant Editor Access None	Grant Editor Access dxContentAuthors	<input checked="" type="checkbox"/> None
Manager	Grant Manager Access None	Grant Manager Access Sara Botello	<input checked="" type="checkbox"/> None

Part 2: Update the Home Page

Then, as Sara, you will refresh the content on the Home page. The change of seasons requires an updated message and image.



ARE YOU READY FOR FALL?

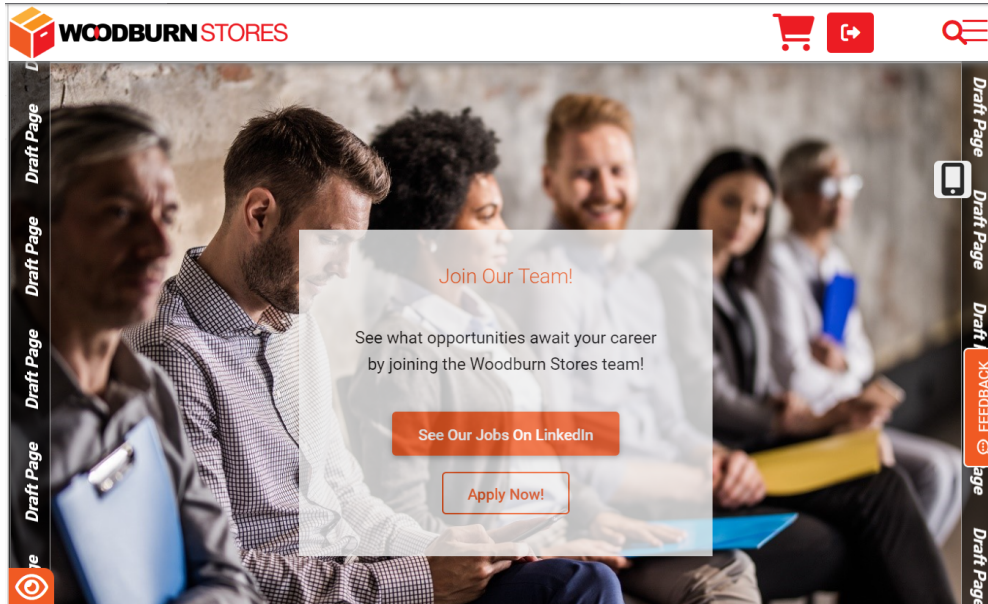
[FIND OUR LATEST DRESSES](#)

[FEEDBACK](#)

Part 3: Create and update a new Jobs Page

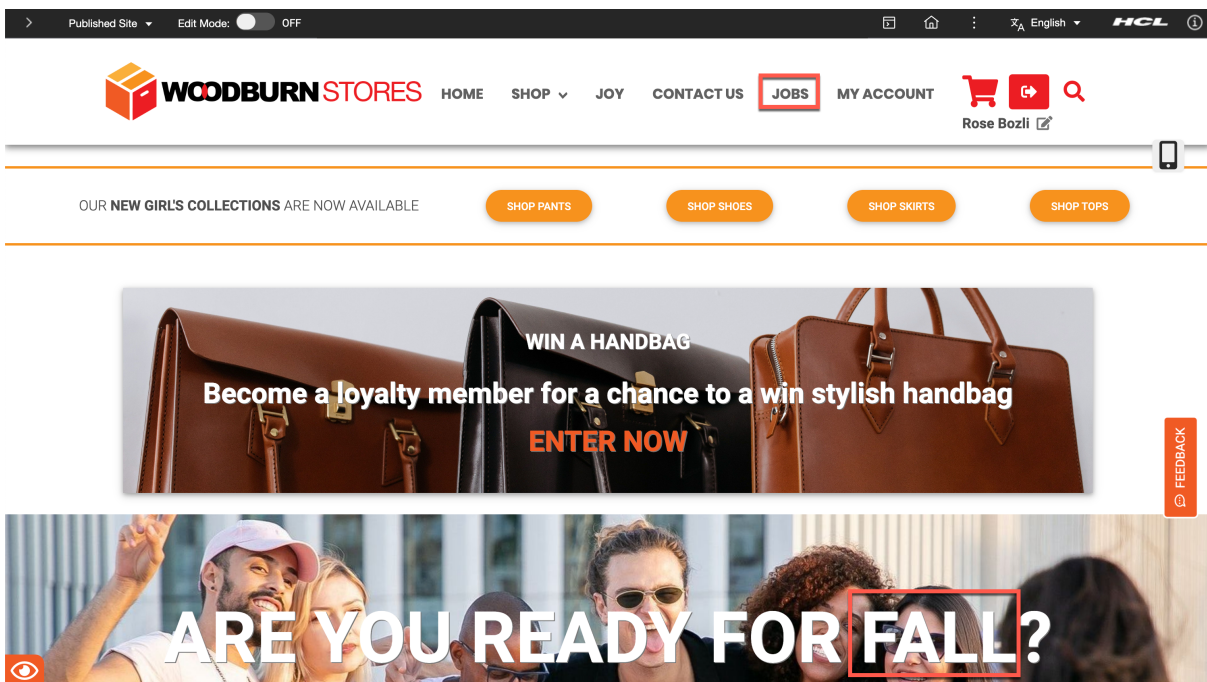
Woodburn Stores is growing rapidly and needs to expand its staff. As Rose, you will add a Jobs page, as part of this project, so that applicants can search for and apply for existing jobs at the various stores.

You may update it with an image appropriate for a job search along with a title, description of the page and two “call to action” buttons that will link to a fictional LinkedIn Woodburn Stores job page and an internal job application page to be created later.



Part 4: Preview, compare and publish your Project changes

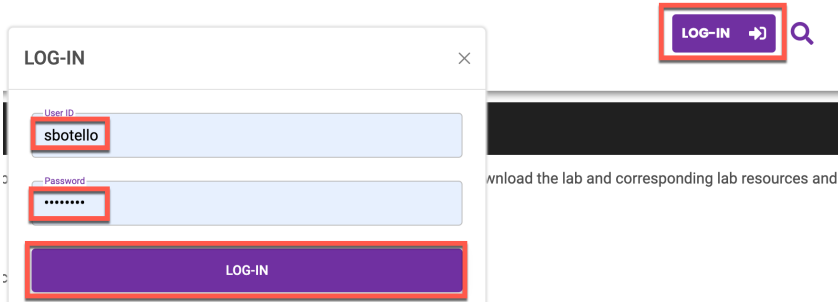
Then review all your changes, compare it with the current published site and then publish them on a future date.



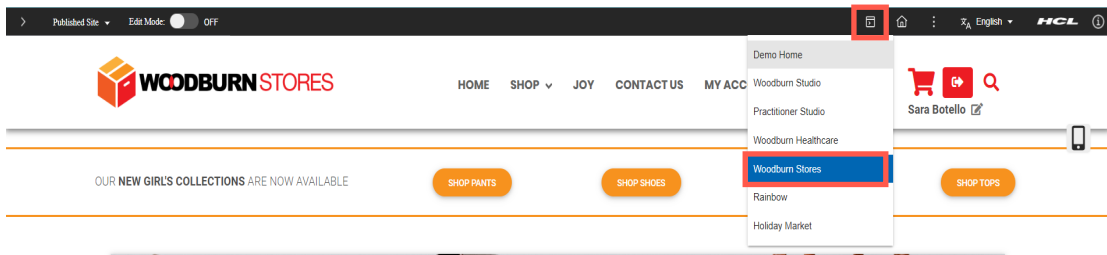
Part 1: Create a new Fall Update Project

As Sara, you will start by creating a new project and grant access to other content authors.

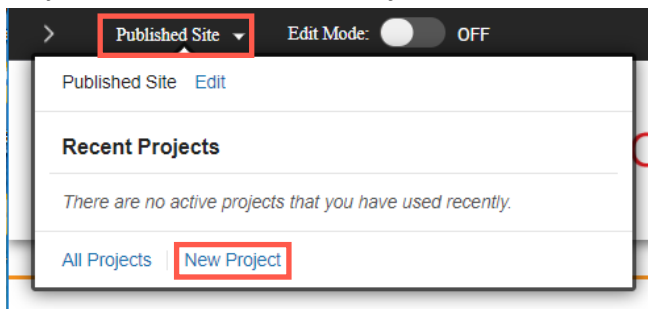
1. Log into your SoFy instance as, Sara, a Marketing Rep. Click **LOG-IN**, enter **User ID sbotello** and **Password HCL-Dem0** and click **LOG-IN**.



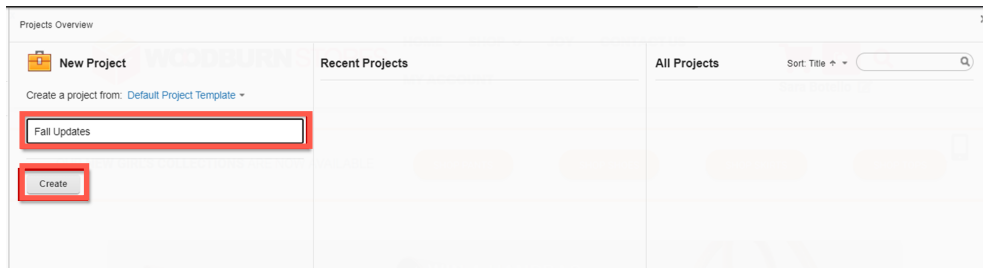
2. Then go to your Woodburn Stores website from the dropdown list.



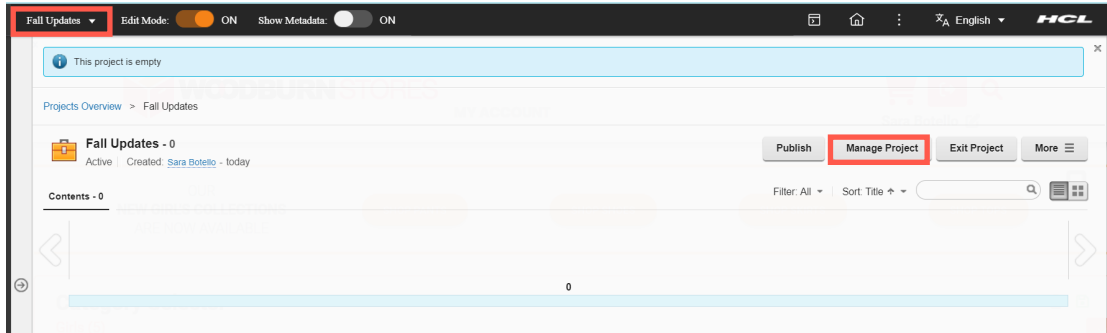
3. Then create a new Project that will contain your and your colleagues changes that need to be reviewed and published together. In the Site Manager, click on **Published Site** to get the Project Menu and click **New Project**.



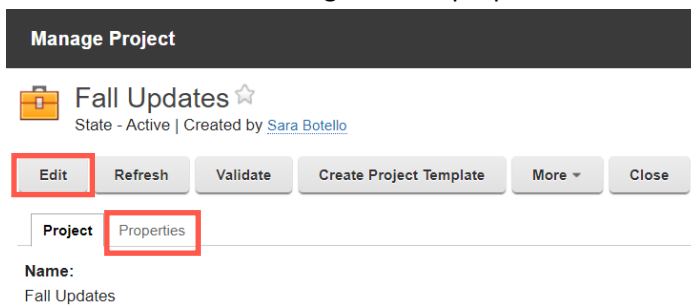
4. You now see the Project Overview section. Enter a name for the new project. Call it **Fall Updates**, then click **Create**.



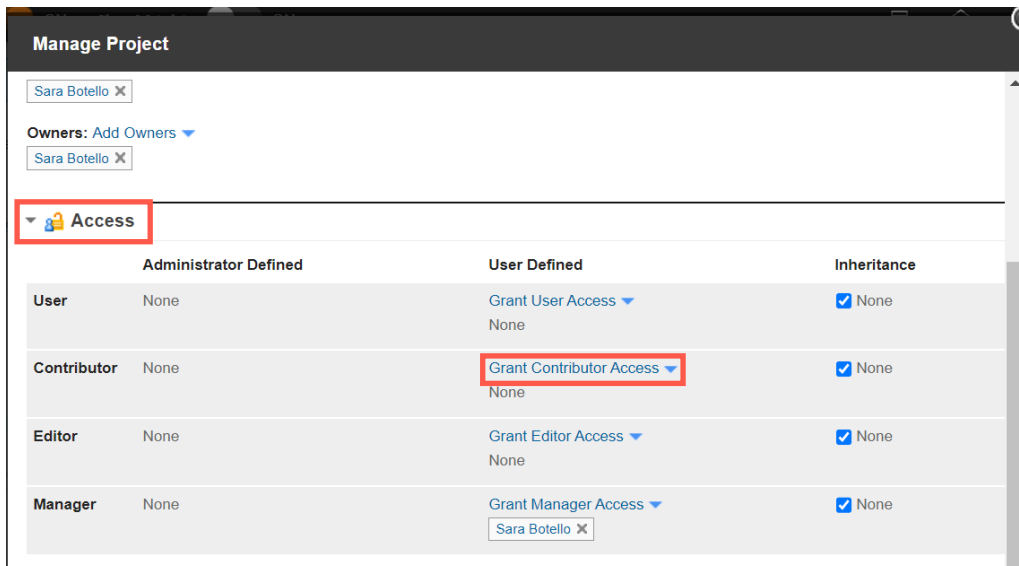
- The Woodburn Stores website is now shown in the context of your Fall Update project and you see your selection. Now you want to open up the project to other content authors and make them co-editors. Click **Manage Project**.



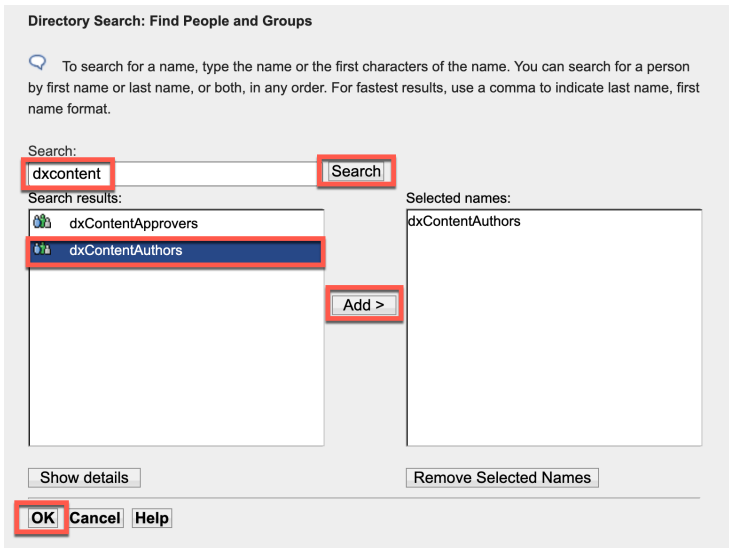
- The access control is managed under properties. Click **Edit** and **Properties**.



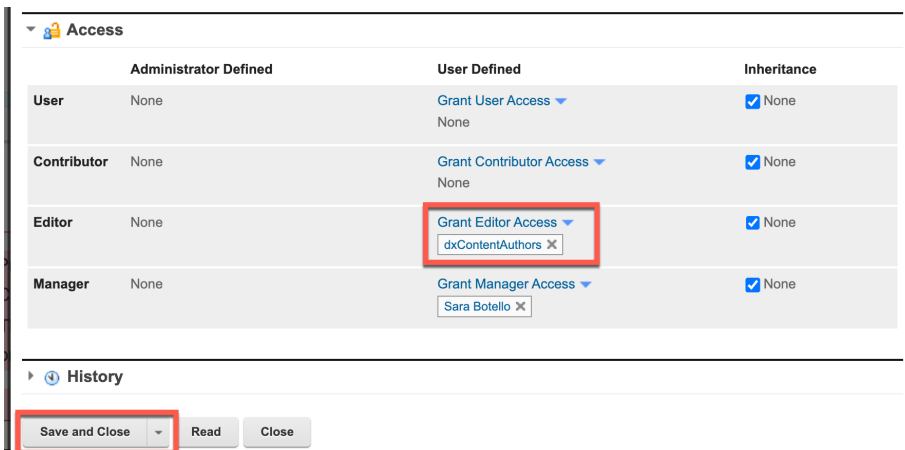
- You want your content authors to be co-editors. Therefore, scroll to the bottom, expand **Access**, then click on **Grant Editor Access**.



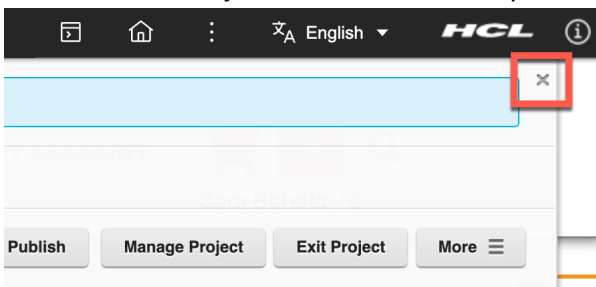
- A popup is presented allowing you to search for users and groups. In this instance of SoFy, content authors are in the dxContentAuthors group. Search for that group. Enter **dxcontent**, click **Search**, select the **dxContentAuthors** group, click **Add** and **OK**.



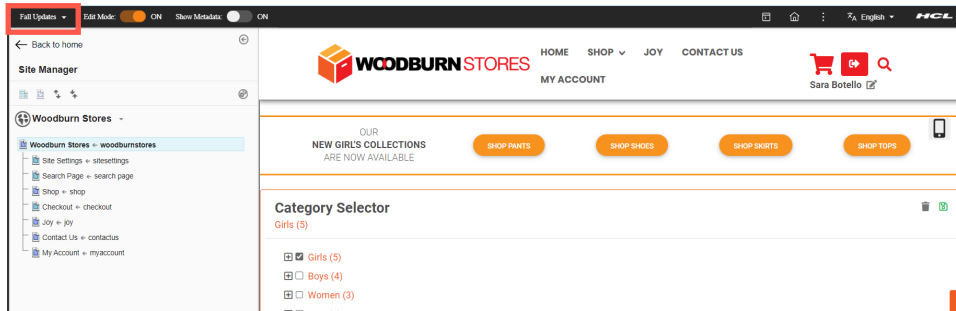
- Check you edit access now has your dxContentAuthors group added and save it. Click **Save and Close**.



- Then close the Projects Overview screen by clicking the **X** at the far right.



11. This brings you back to your home page that is still in the Fall Update project.

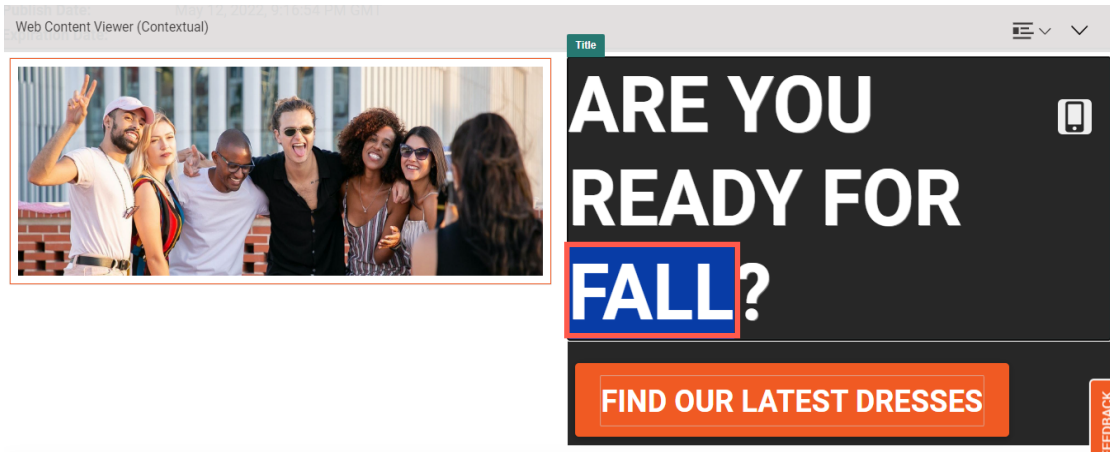


Congratulations! You have created your first project and adjusted the access so that other content authors may contribute to your project.

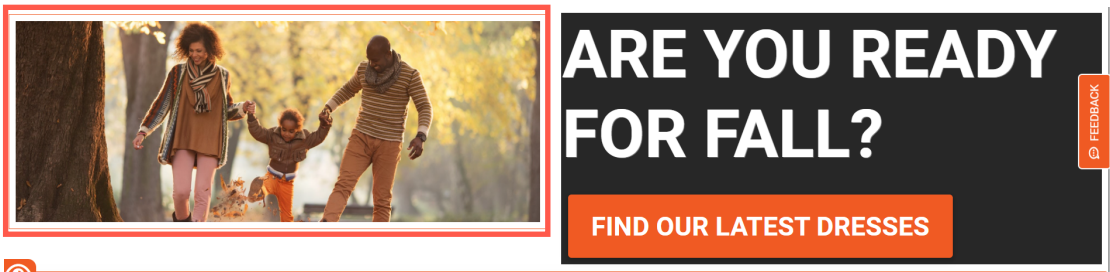
Part 2: Update the Home Page

Then, as Sara, you will refresh the content on the Home page. The change of seasons requires an updated message and image.

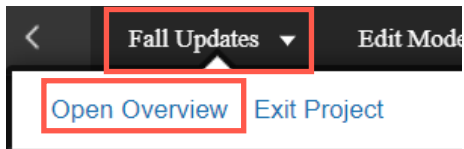
1. In the Home page of Woodburn Stores, change the message of the Homepage Hero content, since the seasons are changing soon. Click on the text to change the season from SUMMER to **FALL**.



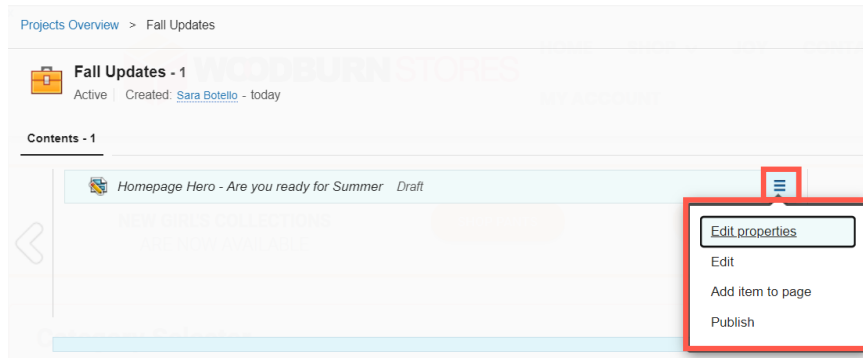
2. Optionally, update the image to the left with the **People in Fall.jpg** in the lab folder, or an image of your choice. Click on it and add it to the DAM or upload as a file resource. It then should look this.



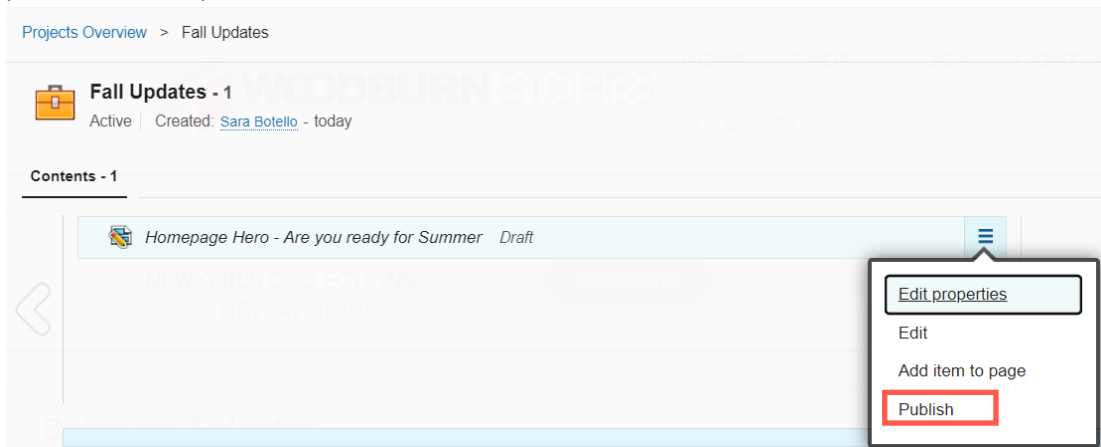
3. Now have a look at the Project View on how these changes appear. Open **Fall Updates** and click **Open Overview**.



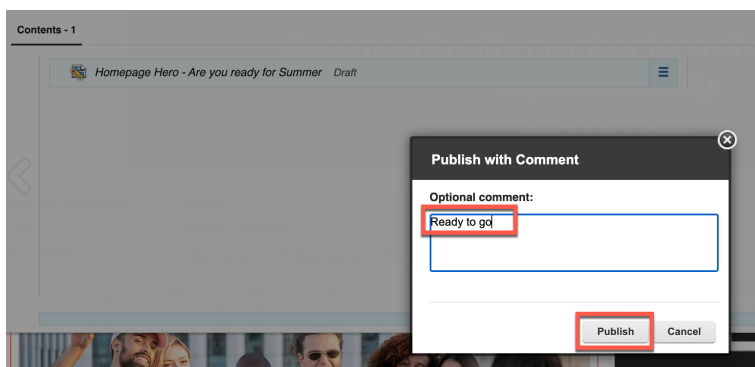
4. Since you are making edits while in the context of the Fall Updates project, notice that the Homepage Hero content you were editing, has automatically been added as a draft item. You can manage the items in the project as well. For this item, you have the menu options
 1. **Edit** to edit the content either directly on the page
 2. **Edit properties** to edit using an authoring form.
 3. **Add item to page** to add the item to the current page.
 4. **Publish** to transition the item to Publish Pending.



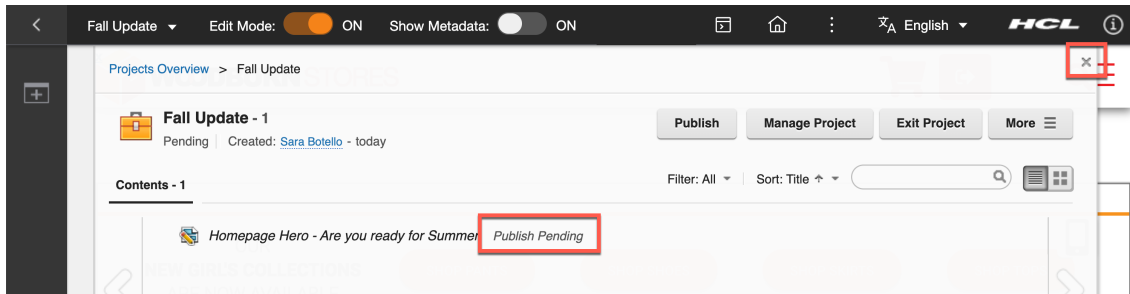
5. As you are finished with the changes, publish the content now. Each item in a project may contain its own dedicated workflow as well. The manage options would therefore be different for those items. For example, if in draft state, there would be a Submit for Review. Then the review state would contain the Publish or Reject options. In this case, you may publish it directly. Click **Publish**.



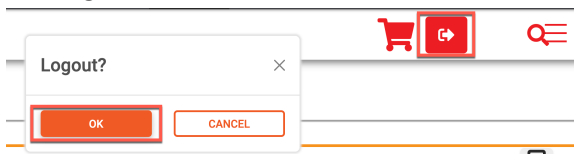
6. It is configured to provide an optional comment. For example, add **Ready to go** and click **Publish**.



- The Homepage Hero item is now in the state **Publish Pending**, meaning ready to be published when the project is published. Notice you have a Publish option as well, to manually publish the project. Do not use that now, as more changes are needed first. Close the Projects Overview.



- And log out.



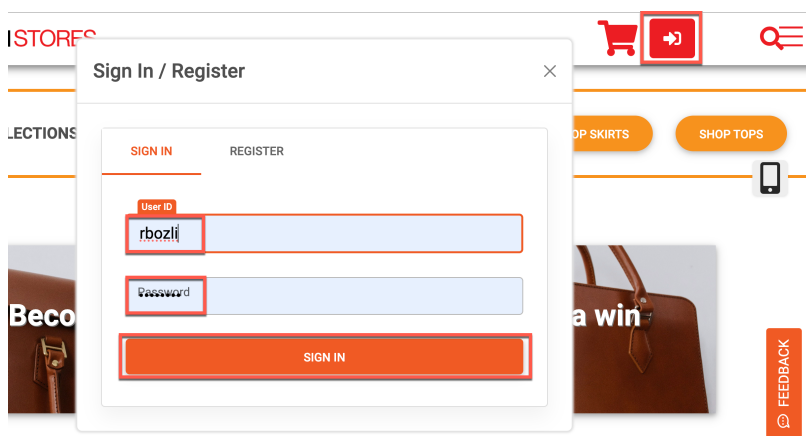
You have successfully updated the Home page as part of the project.

Part 3: Create and update a new Jobs Page

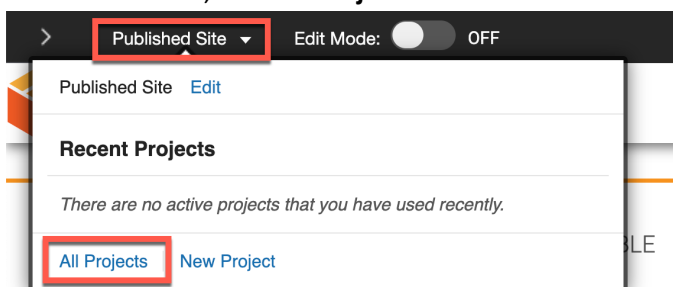
Woodburn Stores is growing rapidly and needs to expand its staff. As Rose, the Marketing Manager, you will add a Jobs page, as part of this project, so that applicants can search for and apply for existing jobs at the various stores.

You may update it with an image appropriate for a job search along with a title, description of the page and two “call to action” buttons that will link to a fictional LinkedIn Woodburn Stores job page and an internal job application page to be created later.

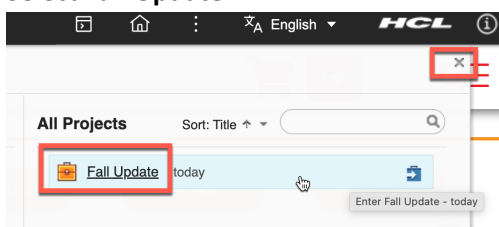
1. Note that after the creation of the project, Rose could start working on this page while Sara was working on the home page. Login as Rose. Click the **Login** icon, enter **User ID sbozli** and **Password HCL-Dem0** and click **SIGN-IN**.



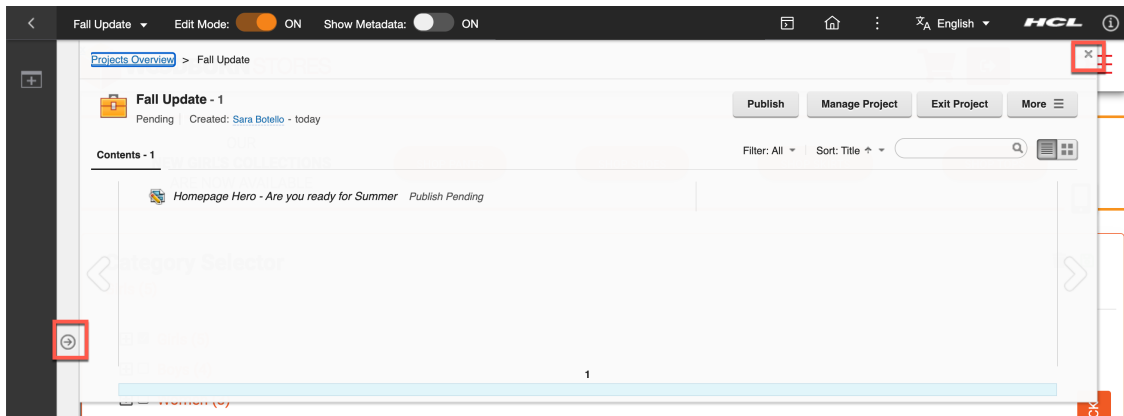
2. Then select the Fall Update project. Click **Published Site** and select the Fall Update project. If it does not show, click **All Projects**.



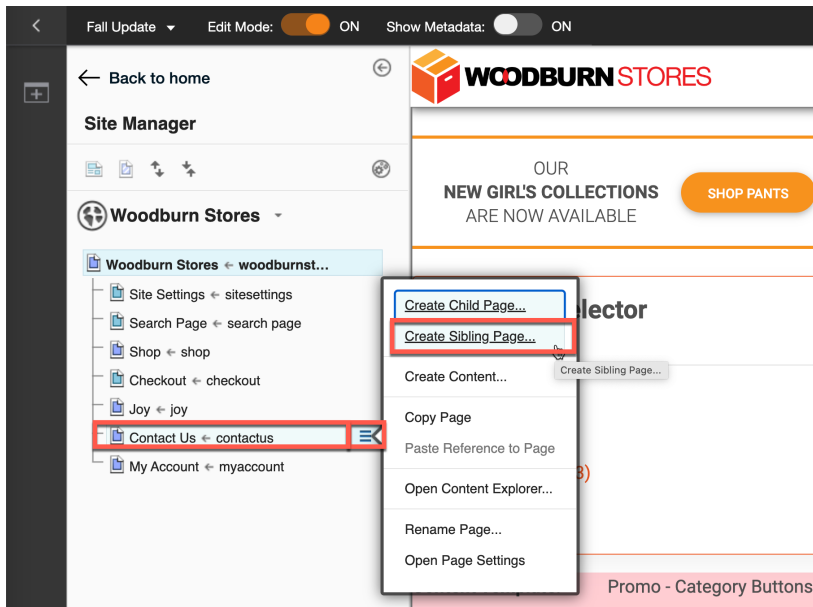
3. Select **Fall Update**.



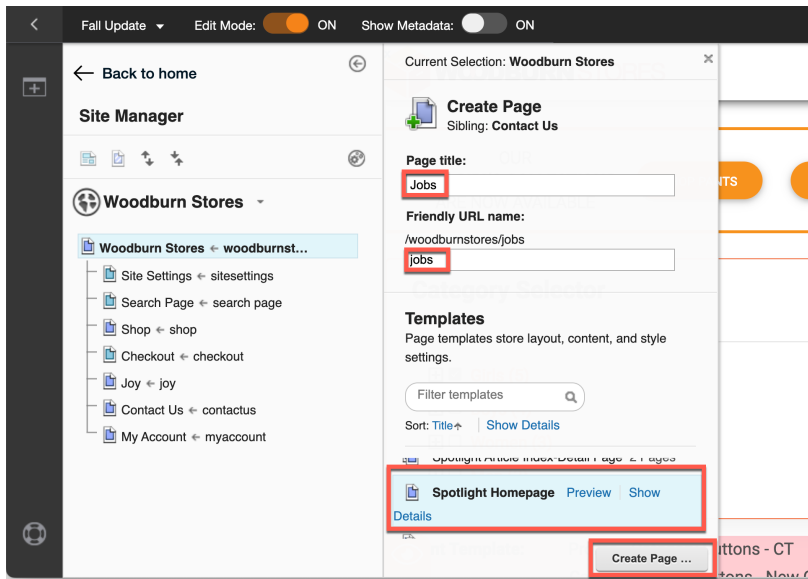
- Notice this brings you automatically into the edit mode. Now create the new Jobs page. Open the Site Tool bar and close the Projects Overview.



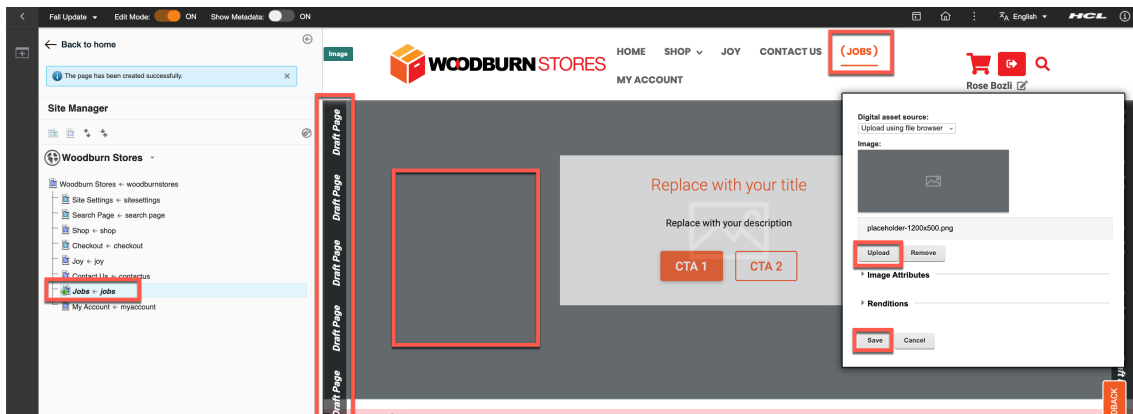
- Then create the Jobs page after (as a sibling) to the Contact Us page and use a Spotlight Home page template that has some good starting content set. Select the menu of **Contact Us** and click **Create Sibling Page**.



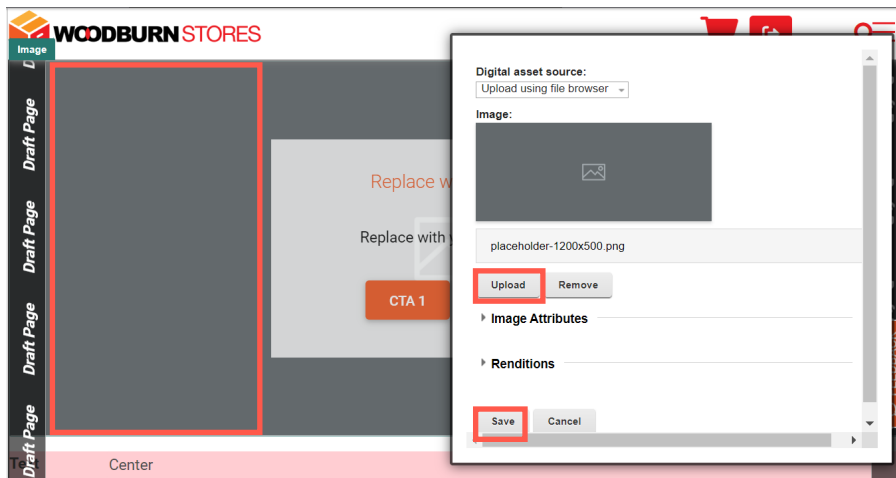
- Set the title as **Jobs**, the friendly URL as **jobs** and select the **Spotlight Homepage** template for the page. Click **Create Page**.



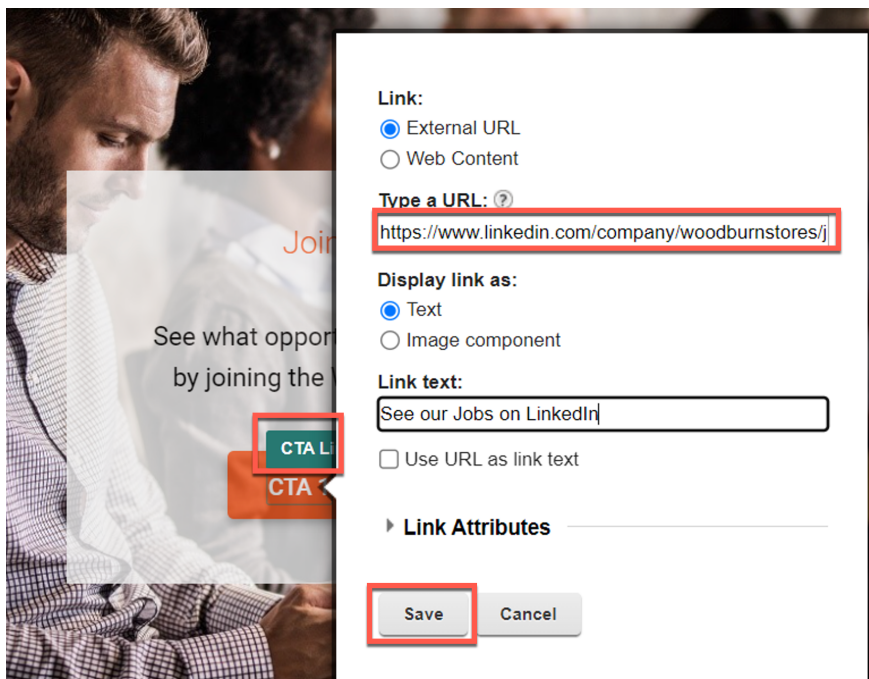
- Refresh the page, if necessary, and select it. Note the new page is created and denoted in the Site Manager with a green plus icon and with a Draft Page watermark. In the navigation is shows with () as well. This helps you to remember, it is part of your project in draft. The page template that was used has some placeholders for adding an image, a title and description, along with two “CTA - call to action” buttons. It also creates a corresponding site area where the content of the page is stored, with the same name Jobs. You may optionally update these now or skip to step 11, as it will not change the flow for the project, but the site may look prettier.



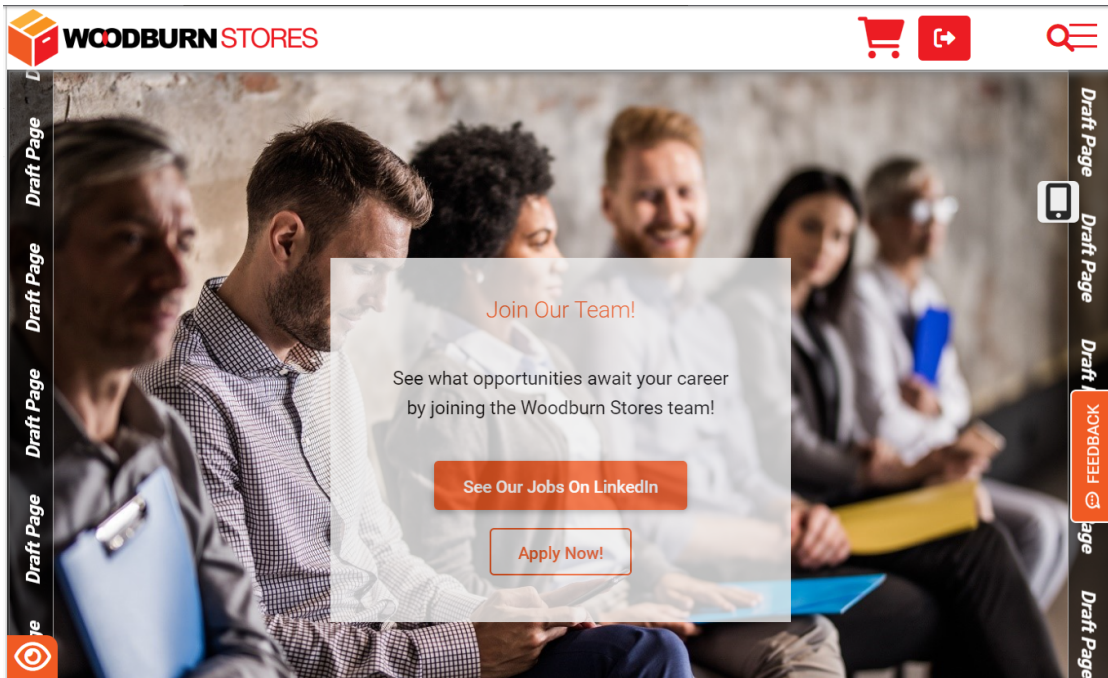
8. Add the image first. Use the image from the lab folder called **JobSearch.jpg** or choose one of your own. Click on the dark gray image area to get the image popup. Select **Upload using file browser**, click **Upload** and select an image of your choice or the **JobSearch.jpg** provided. Then click **Save**.



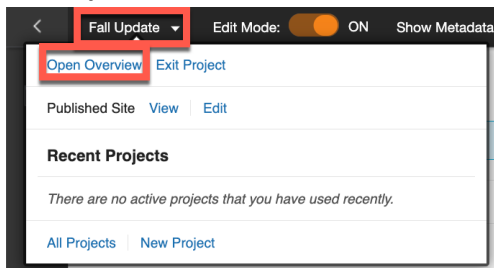
9. Then update the title to **Join Our Team!** and description to **See what opportunities await your career by joining the Woodburn Stores team!** Finally, click on the **CTA 1 Link** to update the and button link (**Type a URL**) to <https://www.linkedin.com/company/woodburnstores/jobs/> and **Link text** to **See our Jobs on LinkedIn**. Click **Save** when done.



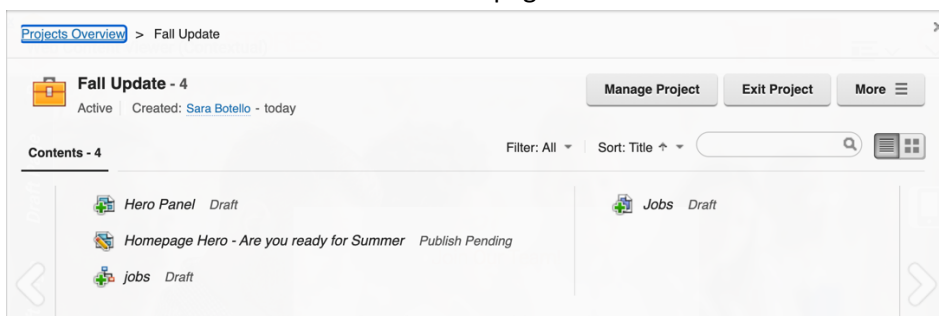
- Similarly, update the CTA 2 button with link text **Apply Now!** And URL: `/wps/portal/woodburnstores/jobs/application`. This could be a future Application page you may create under the Jobs one. You do not need to create this page now to learn how to use projects.



- Now check how these changes appear in your Project View. Open it. Click **Fall Update** and then **Open Overview**.



- Note there are now three new items denoted by the green plus sign. The Jobs page along with the jobs Site Area located in the Woodburn Stores Content library and finally the Hero Panel which contains the content on the page.

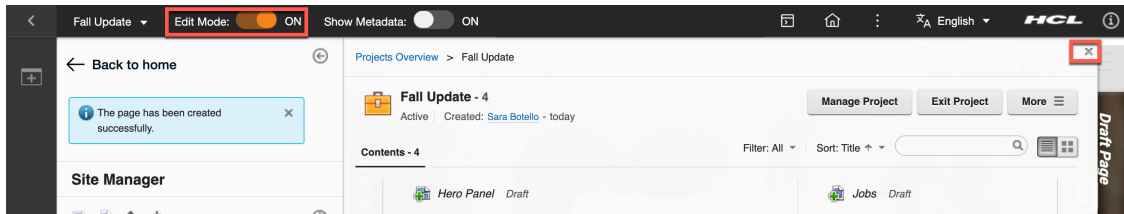


You have now successfully created a new Jobs page from a page template, as part of the existing Fall Update projects!

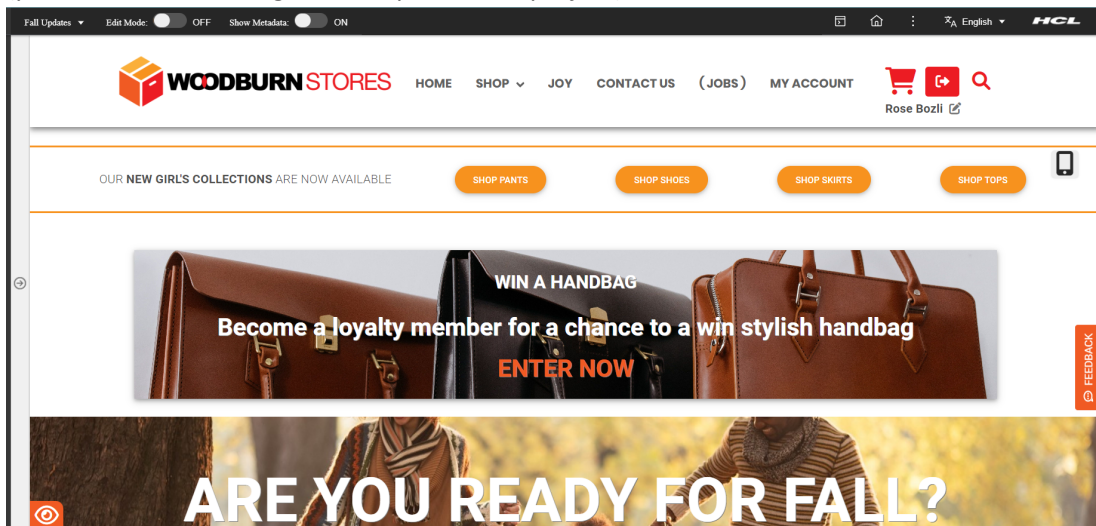
Part 4: Preview, compare and publish your Project changes

Then review all your changes, compare it with the current published site and then publish them on a future date.

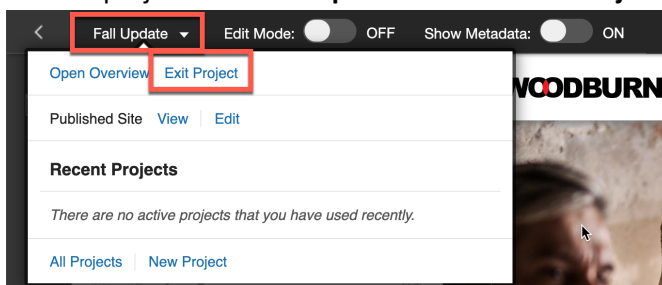
1. As Rose, close the Projects Overview, exit Edit Mode, but stay in your Fall Update project context.



2. Navigate around the site to view your changes. Notice that Jobs appears in the banner now (parentheses indicating that it is part of the project).



3. Exit the project. Click **Fall Update** and then **Exit Project**.



- Navigate around the site and note the Jobs page is no longer in the banner and your home page is no longer showing your updates. For demonstration purposes, you could open a new tab, have one tab with the project in it and the other tab with the published site.

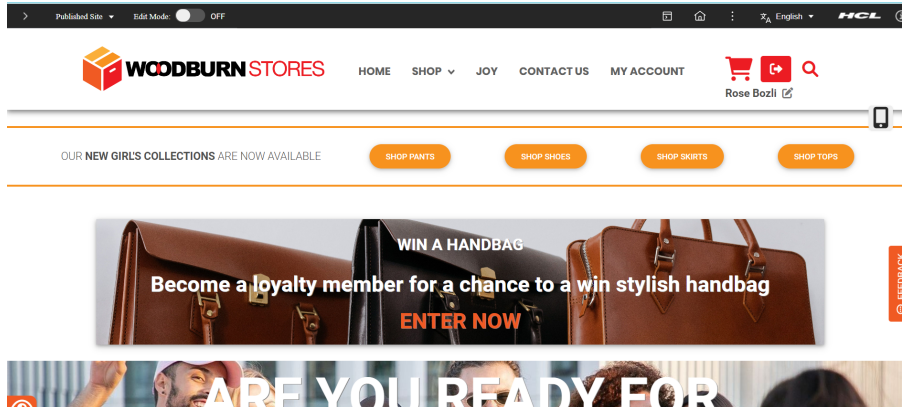


Figure 1 Published Site

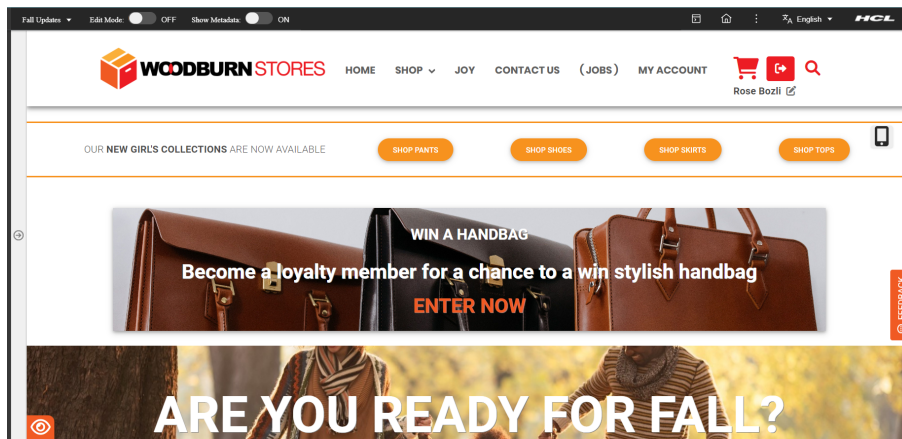
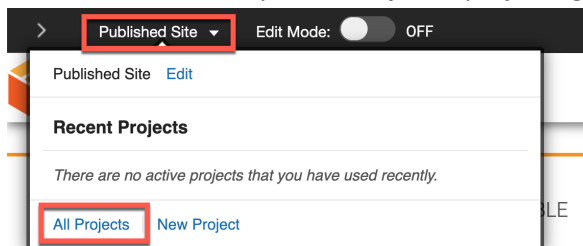
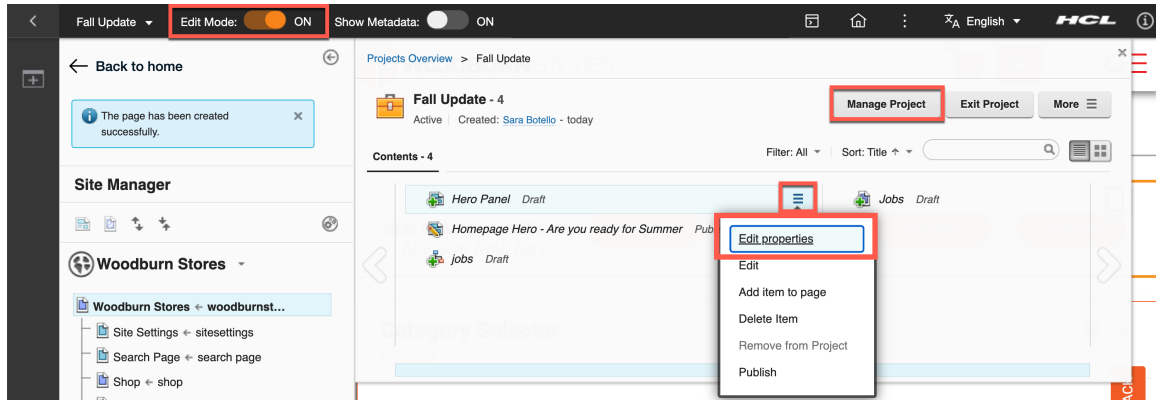


Figure 2 Fall Updates Project

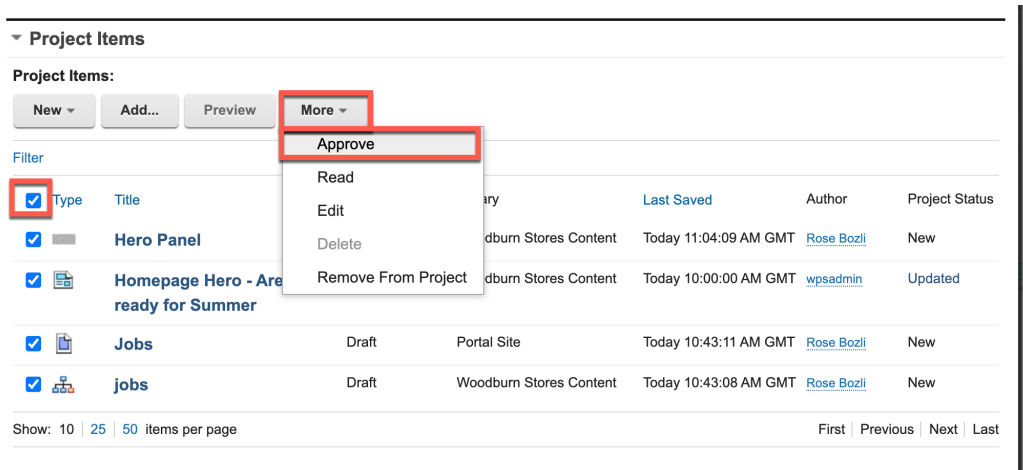
- Now go back to your Fall Updates project. Click **Fall Updates** in the Site Manager, select **Open Overview** and select your **Fall Update** project again.



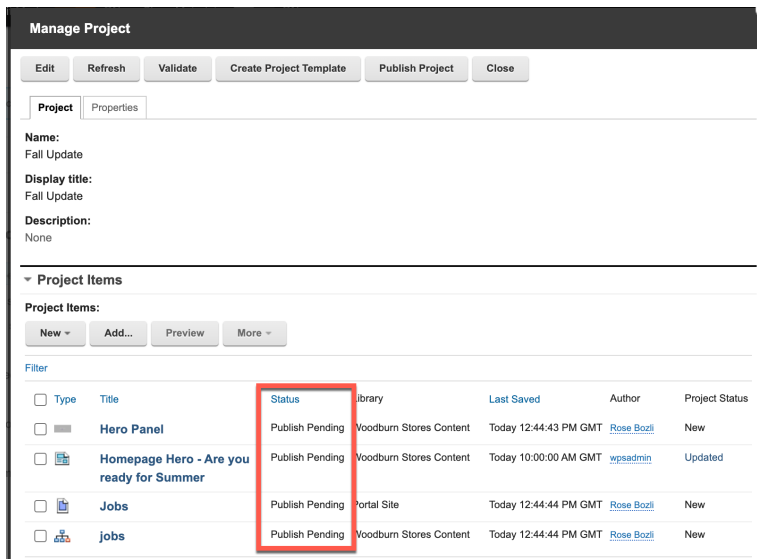
- This brings you back to the edit mode and opens the Project Overview again. You see all the new items created along with the modified items. Note that you can publish items or remove them from the project in this screen, using the menu of the item, here shown for the **Hero Panel** content. Using Manage Project, you have an option to manage all items simultaneously. Click **Manage Project**.



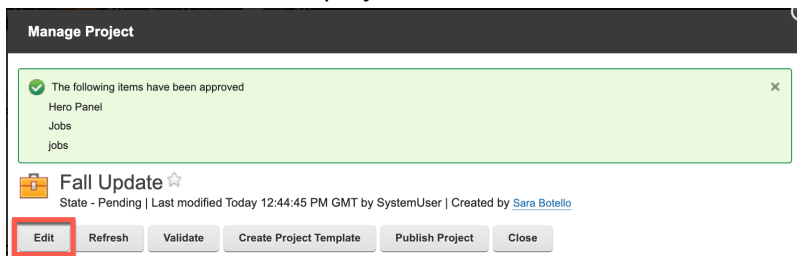
- Then select all project items you want to publish and click **More - Approve**.



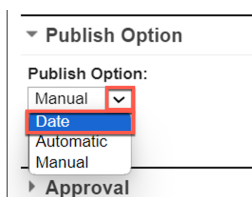
- Notice after clicking **Approve** that all items are now Publish Pending. This means they are ready to be published and are pending your project to be published. Notice you now also have the Publish Project option. Do not use this yet, as you want to plan this for a future date.



- Then edit it to update the date. First, update the default publish option from Manual to Date. Click **Edit** to edit the project.



- Scroll down to **Publish Option** and change it to **Date**.



- Then set the **Publish Date** to a future date, e.g., October 1st of this year and click **Save & Close**.

▼ Publish Option

Publish Option:
Date ▼

Publish Date:
10/1/2023 ▼ Clear

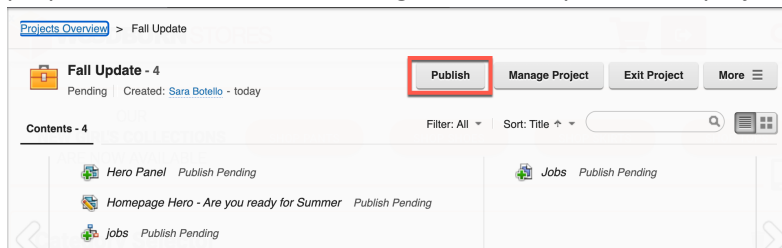
► Approval

► Custom Action

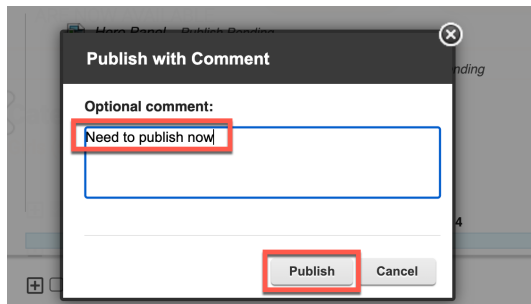
Save and Close ▼ Read Close

* Required Fields

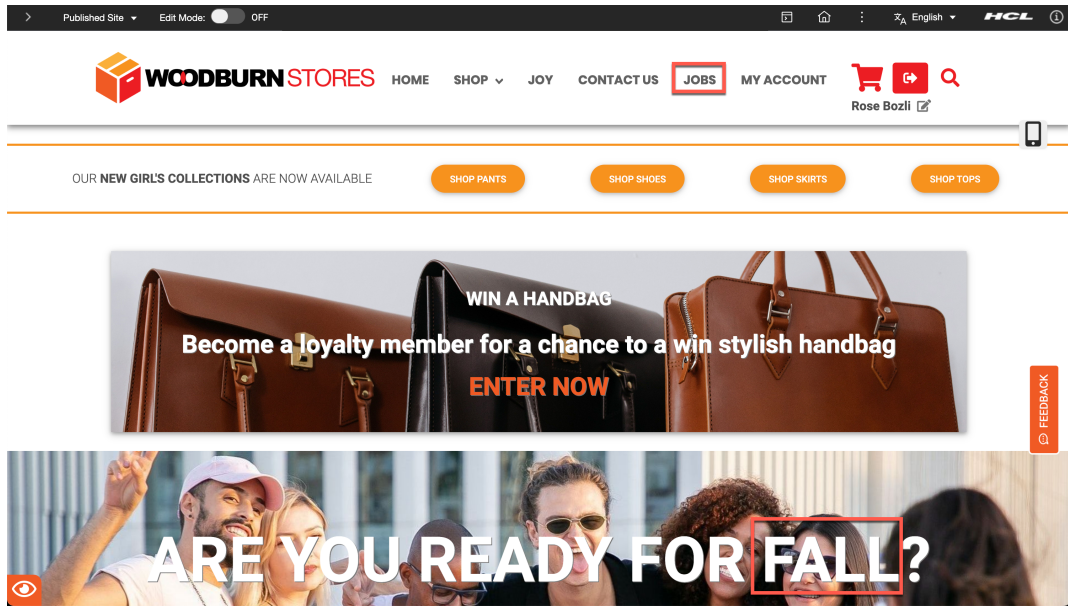
- The project will now automatically publish when the date has been reached. For the purposes of this demonstration, go ahead and publish the project now. Click **Publish**.



- Then give it a valid reason to get published now and click **Publish**.



14. And see your changes are now visible on the published site.



Congratulations! You have successfully previewed all your changes together as part of the project. You then compared it to the current published site. After that you were able to finally publish your project.

Conclusion

Using this lab tutorial, you learned how easy it is to manage several website changes as a team with HCL DX projects. As Sara, you created a project and gave your team access to it, refreshed the home page and then allows Rose add a new Jobs page. As Rose, you were then able to compare your project version of the website to the published version. And as all changes looked good, you were able to plan a publication and finally publish your project directly.

Feel free to try out projects using other changes as well, like deleting and making other changes to pages and content.

Resources

Refer to the following resources to learn more:

HCL Digital Experience Home - <https://hclsw.co/dx>

HCL Digital Experience on HCL SoFy - <https://hclsofy.com/>

HCL Software - <https://hclsw.co/software>

HCL Product Support - <https://hclsw.co/product-support>

HCL DX Product Documentation - <https://hclsw.co/dx-product-documentation>

HCL DX Support Q&A Forum - <https://hclsw.co/dx-support-forum>

HCL DX Video Playlist on YouTube - <https://hclsw.co/dx-video-playlist>

HCL DX Product Ideas - <https://hclsw.co/dx-ideas>

HCL DX Product Demos - <https://hclsw.co/dx-product-demo>

HCL DX Did You Know? Videos - <https://hclsw.co/dx-dyk-videos>

HCL DX GitHub - <https://hclsw.co/dx-github>

HCL DX Web Developer Toolkit - <https://github.com/HCL-TECH-SOFTWARE/WebDevToolkitForDx>

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