



# HDX-BU-200

## Site Builder Lab

HCLSoftware U

Creating a new generation of experts

Edition: April 2024

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## Author(s)

This document was created by the following Subject Matter Experts:



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**Company:**  
**HCLSoftware**

### **Bio**

Herbert Hilhorst is an HCL Digital Experience (DX) Technical Advisor at HCLSoftware.

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## Introduction

This hands-on lab gets you started on the HCL Digital Experience (DX) platform and its Site Builder capabilities. You will act in the role of Albert, a Marketing Manager. You will see how quickly and easily you can create new websites with Site Templates and modify it, and also how to create and use Section Templates.

In this DX business user lab, you will play the role of a Marketing Manager.



**Albert Dora**, Marketing Manager, based in San Francisco (USA)

As Albert, a marketing manager with site manager rights, you will create a new department site with some modifications using the site builder, create a new news section template and use this section template to add to your new site.

## Prerequisites

1. Completion of previous HDX-BU-200 courses, including the optional labs
2. Have a running DX instance on CF216 or newer with DX Solution Modules in HCL SoFy (<https://hclsofy.com/catalog/dx-solution-modules>), as you will use one of the .
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:

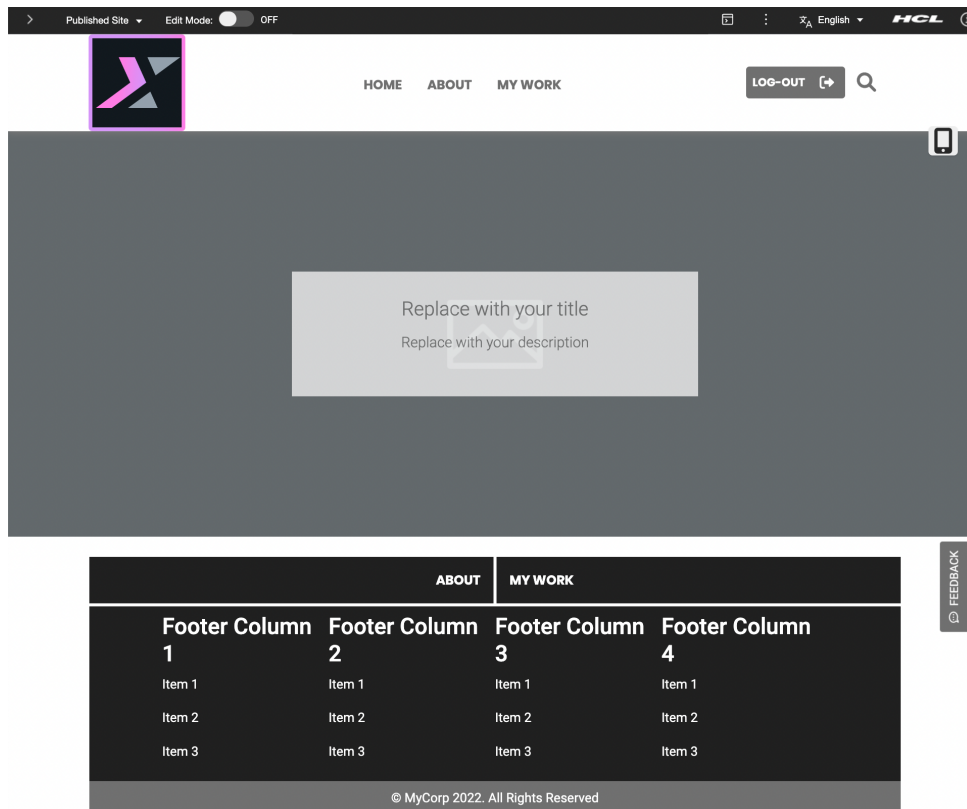
Purpose	User	Password
SoFy Login	Your official email id	Your password
SoFy Solution Console Login	sol-admin	<from SoFy solution>
DX Login Albert (Site Manager)	adora	HCL-Dem0

## Lab Overview

In this lab, you will explore the Site Builder from the role of a Site Manager. Several departments would like to have their own dedicated site. All sites may have a similar basic structure, and may share the same page templates for different areas of the site. The IT team has prepared this with a dedicated site template that respects the corporate branding. You will create a first dedicated site for one of your departments, using this site template in the Site Builder. This allows them to try HCL Digital Experience and provide feedback that will help other departments to benefit more. After some testing, they would like to add a news section. As there are other sites that may benefit from this as well, you will create a news section template and add this to this department’s site.

### Part 1: Create a New Department Website using Site Template

As Albert, a Marketing Manager with Site Manager rights, you will create a new site called Department A using the Site Builder. You will use an existing site template and make some modifications. You will remove a Contact Us page and rename My Account to My Work.

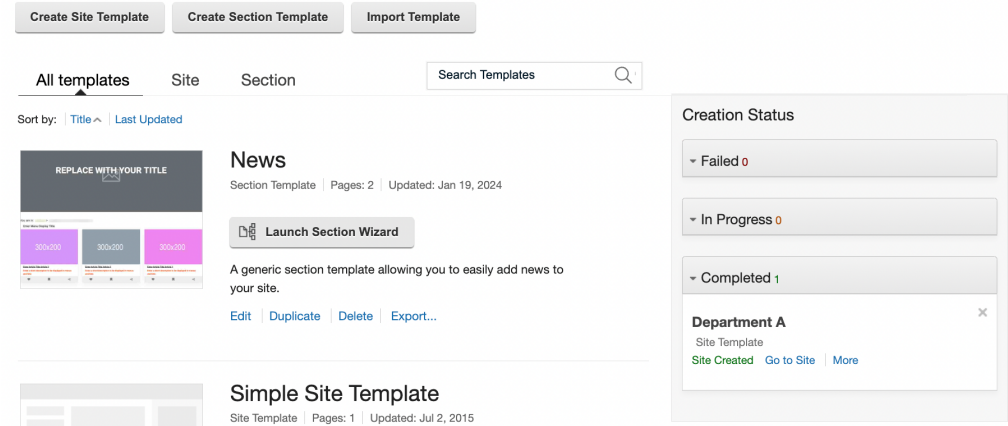


### Part 2: Create a News Section Template

Then you will create a new news section that you may use for your newly created site. Since this new section will be reused in other existing sites as well, future, you will first create a new news Section Template.

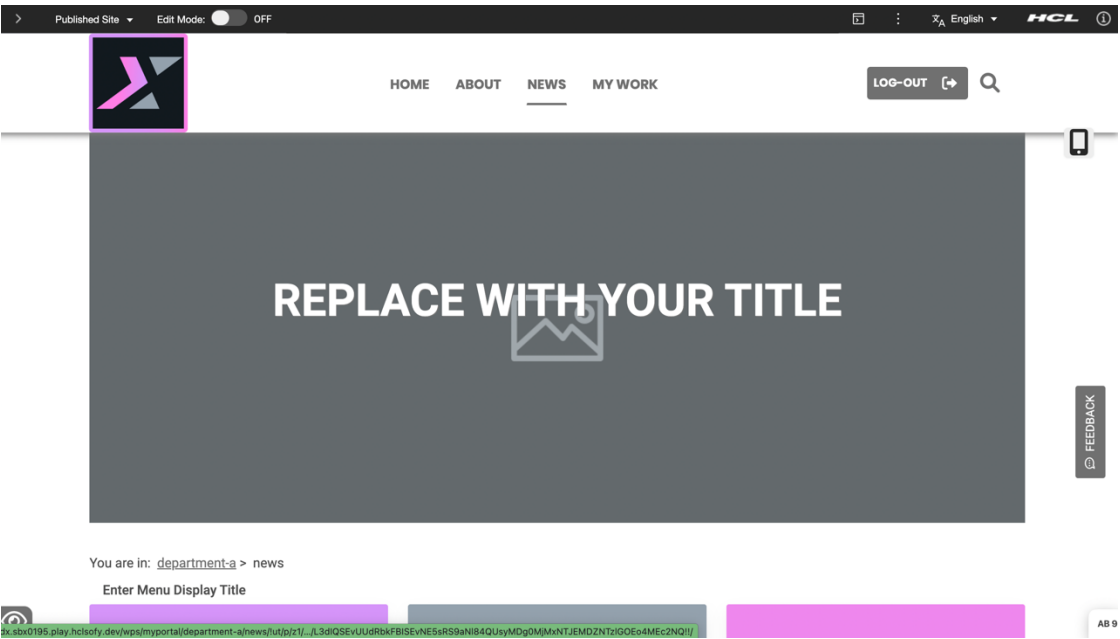
### Site Builder

Create site builder templates for either a full website or a section of a website. Site builder templates include pages, content, page hierarchy, libraries, theme selection and more. The Content Template Catalog includes page templates for your immediate use, or you can create your own page templates. [Learn More](#)



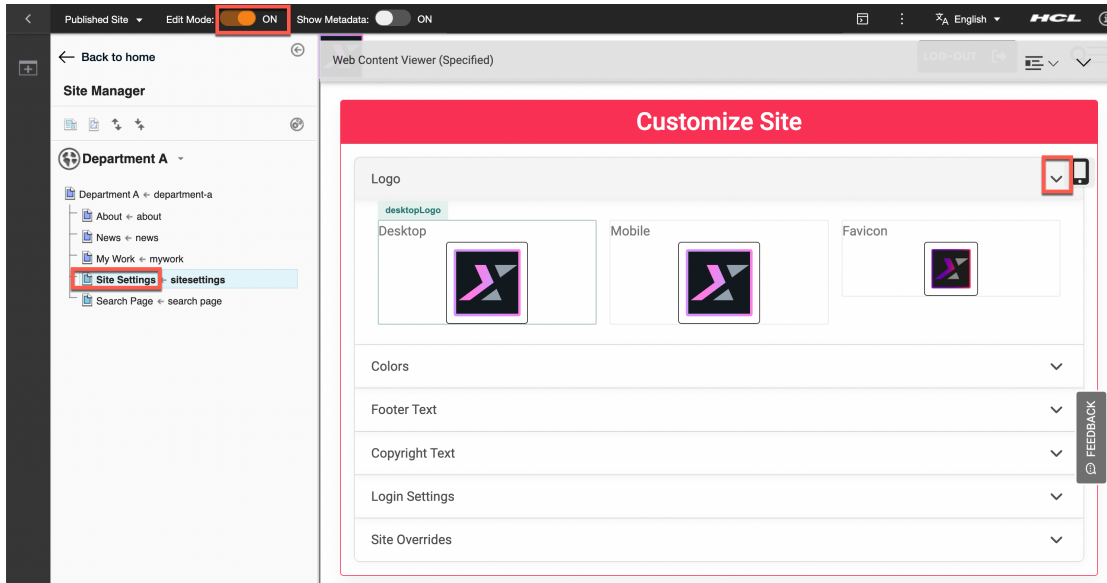
### Part 3: Add a News Section to Your Site

And then you will use your new News Section Template to add the news section to your newly created site.



### Optional Part 4: Change the Site's Look & Feel

If you are interested in how you could easily change the look and feel of your new site, you may use the site settings option made available by IT. It allows you to easily change the logo, colours, copyright and footer text, as well as other details.

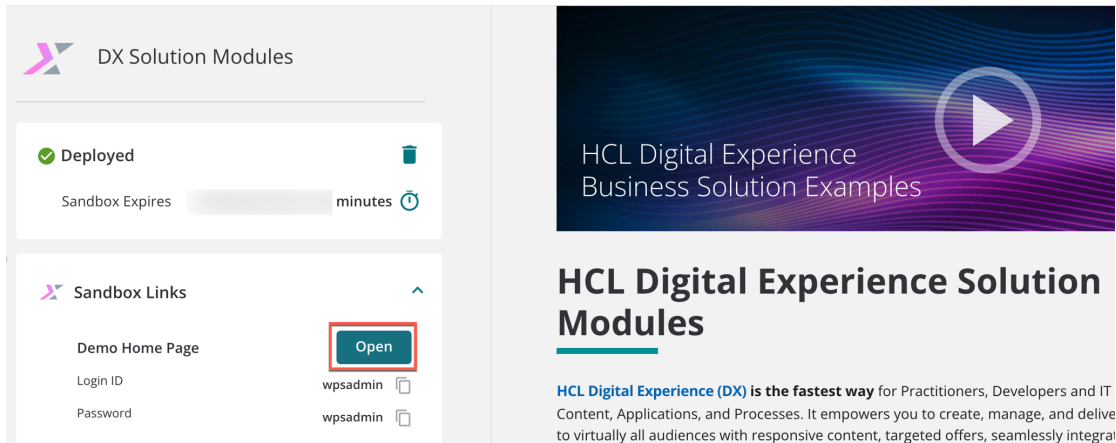




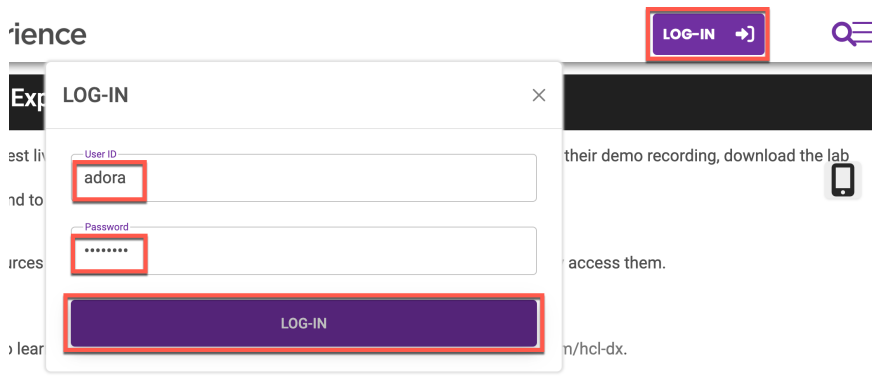
## Part 1: Create a New Department Website using Site Template

As a Site Manager, you will create a new site called Department A using the Site Builder. You will use an existing Simple Spotlight site template and make some modifications. You will remove a Contact Us page and rename My Account to My Work.

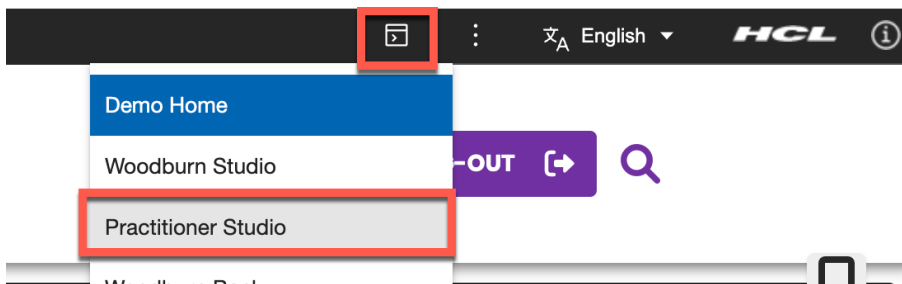
1. Go to the Demo Home page first. On the server where the DX Solution Modules has been installed, next to **Demo Home Page**, click **Open**.



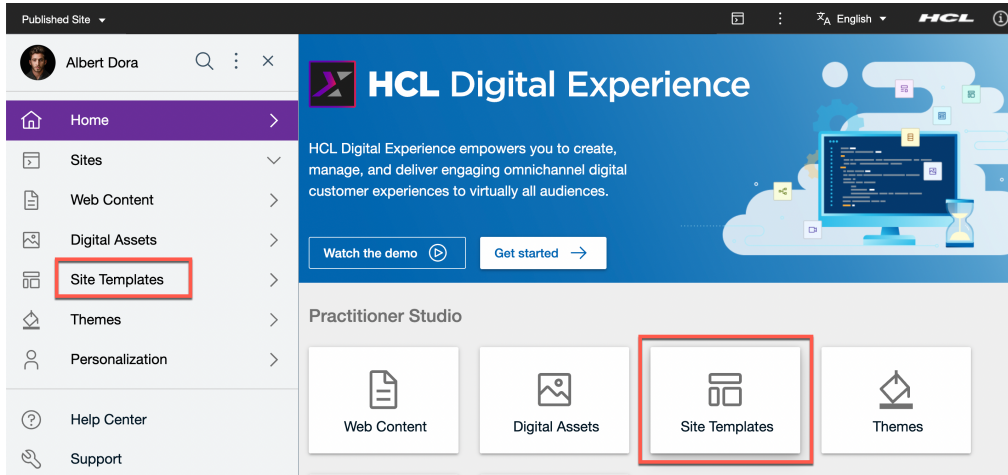
2. Log into as Albert Dora, a Marketing Manager with Site Manager rights. Click **LOG-IN**, enter **User ID** adora and **Password** HCL-Dem0 and click **LOG-IN**.



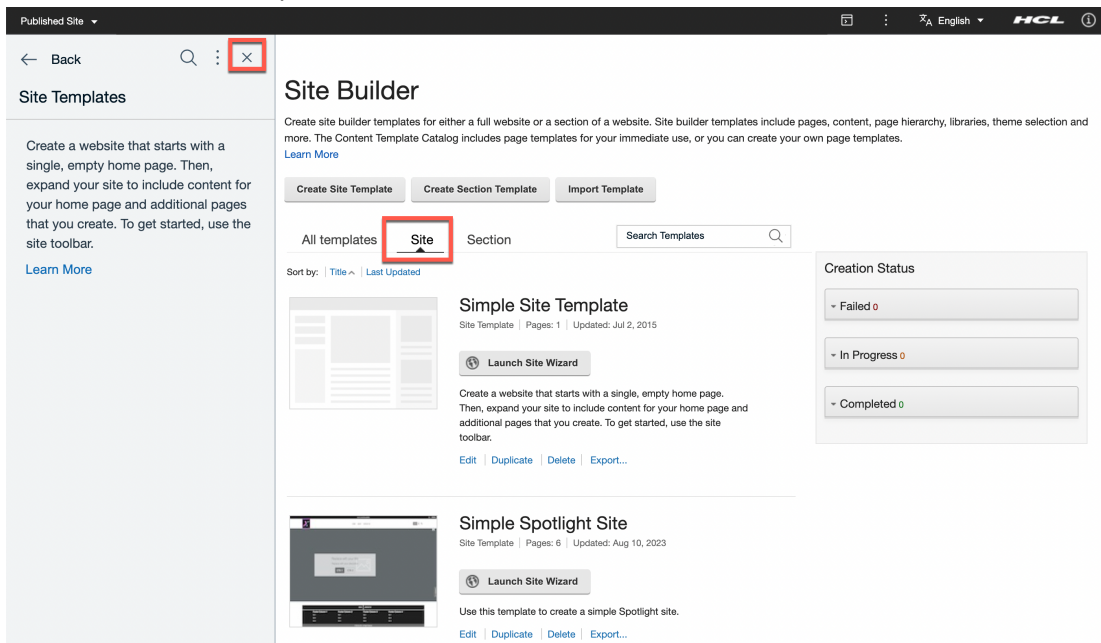
3. Then open the Practitioner Studio that gives you access to the Site Builder. Open the site menu and click **Practitioner Studio**.



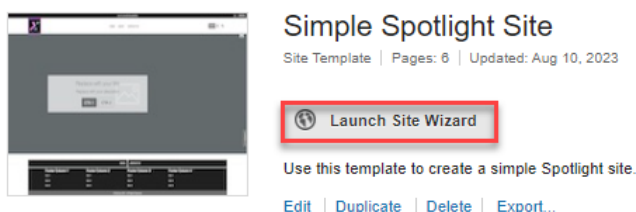
- And select **Site Templates** with any of these two options.



- In the Site Builder, click on the **Site** tab to see all available site templates. Also close the sidebar to have more space for the Site Builder.



- The Simple Spotlight is a great example to help you building a site. Select the **Simple Spotlight Site** template and click **Launch Site Wizard**.



- Then complete the **Site Name** tab details with your **Site Title** and **Unique site name** set to **Department A**, the **Friendly URL name** that defines your site URL set to **department-a**, and provide a good description of the purpose of the site, e.g. **A dedicated intranet site for department A**. Then click >. You may need to zoom out to see it.

Create a Site: simpleSpotlightSite

Site Name Content Library Site Structure

---

Name Your Website

The site template creator provided default setting for the website. You can change these settings to customize your site properties.

\* Site title:

\* Friendly URL name:

Unique site name:

Description:

- You want to create a dedicated library to store all the content for this new site. Therefore keep the Create a content library default setting. Then name your web content library with a unique name, e.g. **departmenta** and give it a description to help other site managers understand its purpose, e.g. **Department A Site Library**. Then click >.

Create a Site: simpleSpotlightSite

Site Name Content Library Site Structure

---

Select a Library to Store Content

Content for your site is stored in the content library that you select. [Learn More](#)

Create a content library

Use an existing content library

Use the existing portal content library (Portal Site)

\* Unique library name:

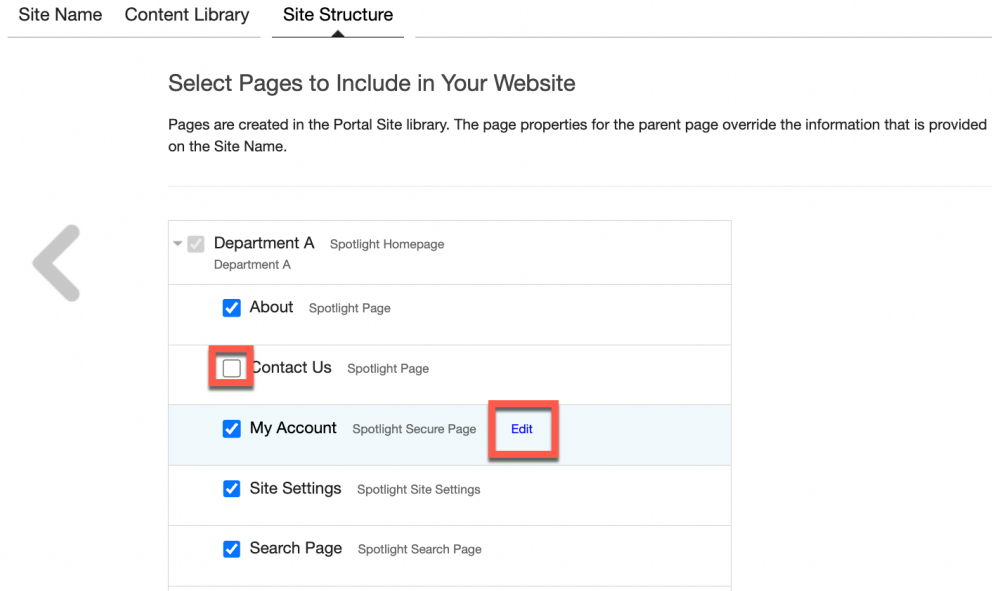
Description:

Language:

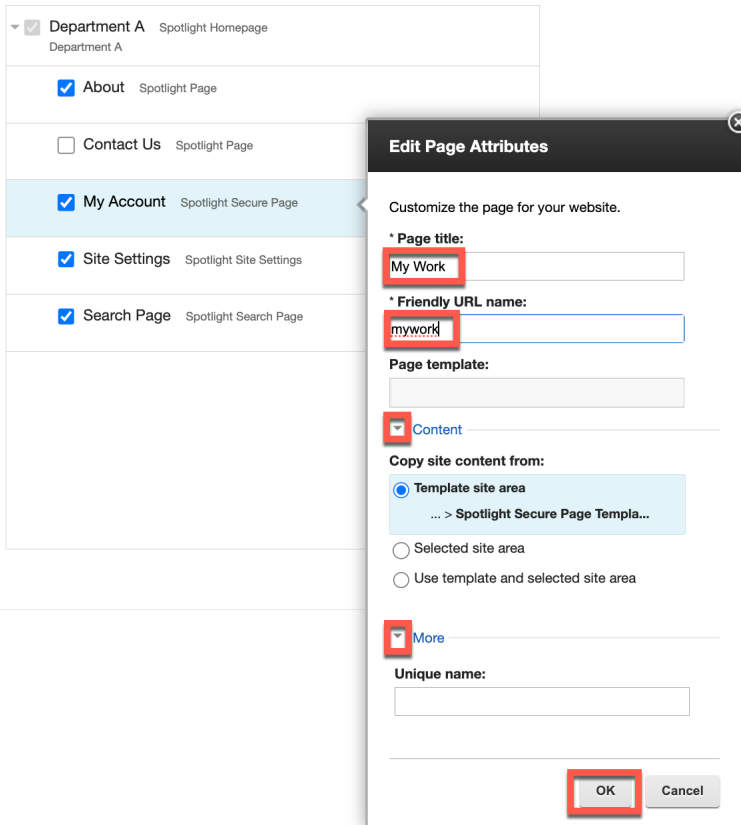
You cannot change the language after the library is created.

- The **Site Structure** screen shows all pages that will be included in your site. You see on what page template each page will be created. You do not need the **Contact Us** page, so **uncheck** that. Then edit the My Account page to rename this to My Work. Click **Edit**.

Create a Site: simpleSpotlightSite



- Set **Page title** to **My Work** and **Friendly URL name** to **mywork**. Open the **Content** to see that this content for this page will be copied from its corresponding page template. Under **More** you could give it a unique name too that your developers may use to access it. Then click **OK**.



- Then go the advanced setting to limit access to employees and grant access the right administrators of this department. Click **Advanced Settings**.

Create a Site: simpleSpotlightSite

Site Name Content Library Site Structure

Select Pages to Include in Your Website

Pages are created in the Portal Site library. The page properties for the parent page override the information that is provided on the Site Name.

<input checked="" type="checkbox"/>	Department A	Spotlight Homepage
<input checked="" type="checkbox"/>	About	Spotlight Page
<input type="checkbox"/>	Contact Us	Spotlight Page
<input checked="" type="checkbox"/>	My Work	Spotlight Secure Page
<input checked="" type="checkbox"/>	Site Settings	Spotlight Site Settings
<input checked="" type="checkbox"/>	Search Page	Spotlight Search Page

You can create your site now!

**Create Site**

Or continue with advanced settings such as site experience and access control.

**Advanced Settings**

- First remove the anonymous portal users and all authenticated portal users. Use the X to remove them. Then add the employees as users. Click **Add** and **Select from all users and groups**.

Create a Site: simpleSpotlightSite

Site Name Content Library Site Structure Advanced

Site Experience Access Control

Grant Access to the Site

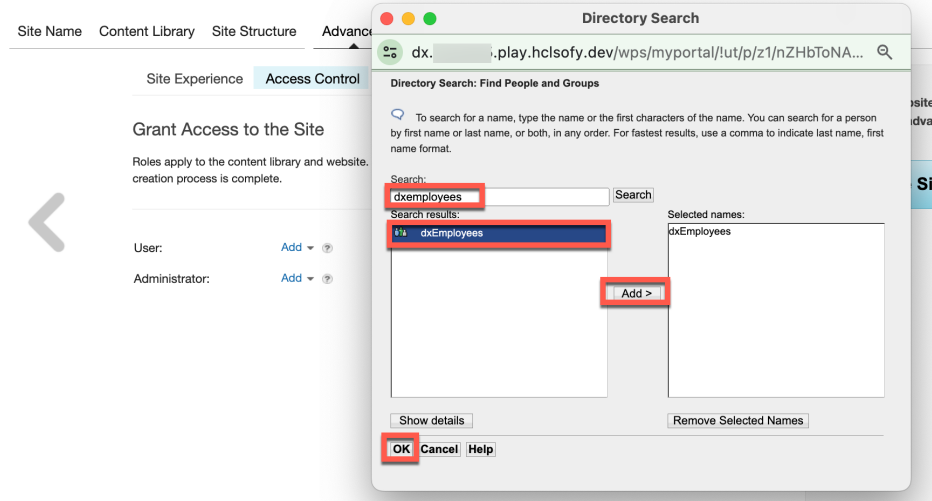
Roles apply to the content library and website. You can refine permissions by role for library resources after the creation process is complete.

User: [anonymous portal users] [X] [all authenticated portal users] [X]

Administrator: Add [anonymous portal users] [all authenticated portal users] [all users] **Select from all users and groups**

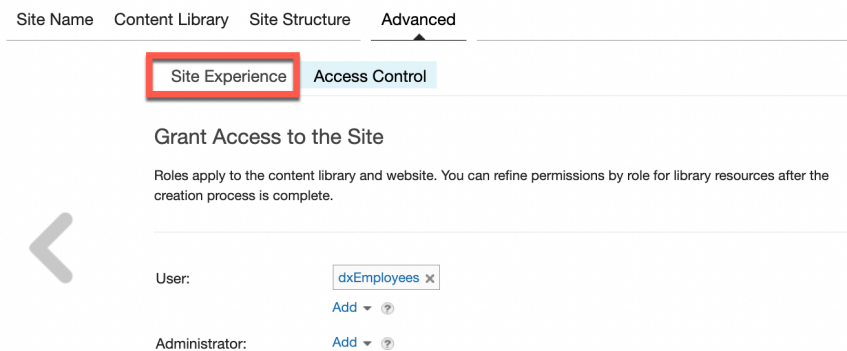
- Then search for the existing dxemployees group that IT has prepared (they could even prepare a dedicated Department A group). Enter **dxemployees** under Search, **click Search**, **select the dxEmployees** group under **Search results**, click **Add** to move it to the **Selected names** and click **OK**.

Create a Site: simpleSpotlightSite



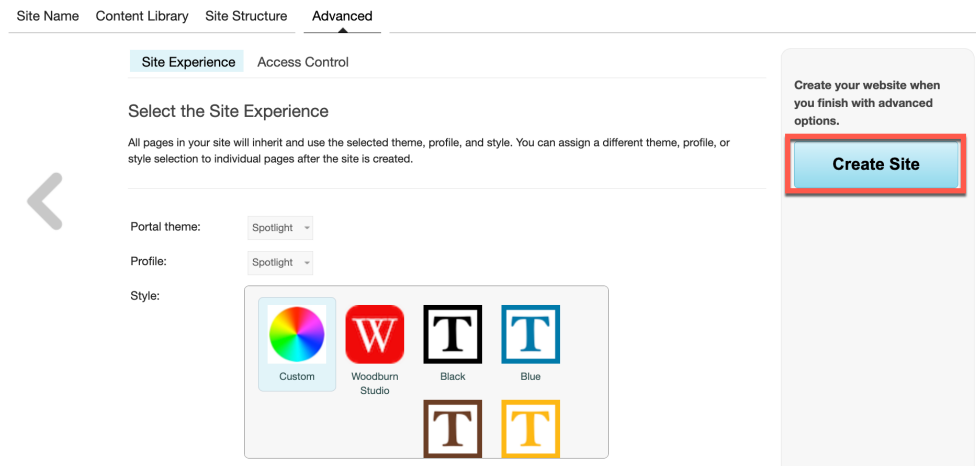
- There is no need to set the administrator, as this will inherit automatically. Then have a quick look at the site experience options. Click **Site Experience**.

Create a Site: simpleSpotlightSite

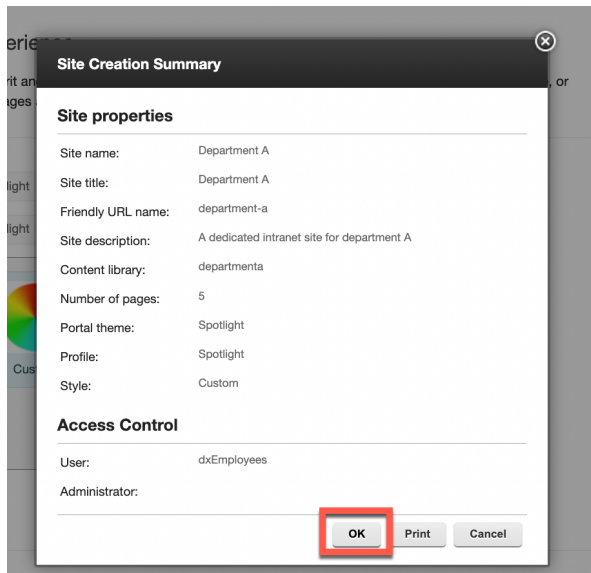


- Notice a few available styles. Keep the Custom one, as this will give you more options to adapt the look and feel. Then create your site. Click **Create Site**.

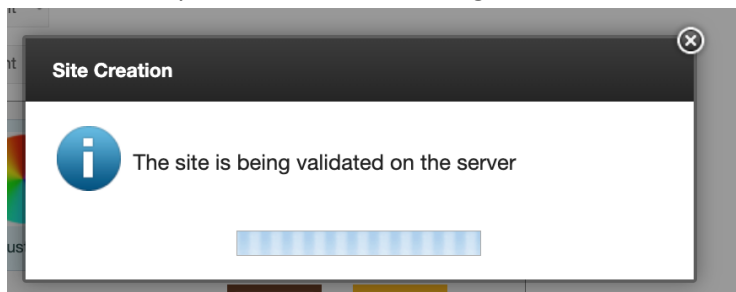
Create a Site: simpleSpotlightSite



- Double check if everything is correct. Then click **OK**.



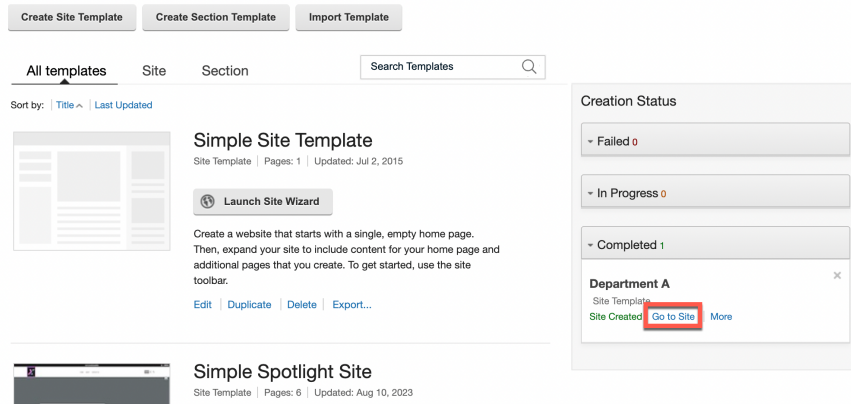
- You will shortly see that the site is being validated.



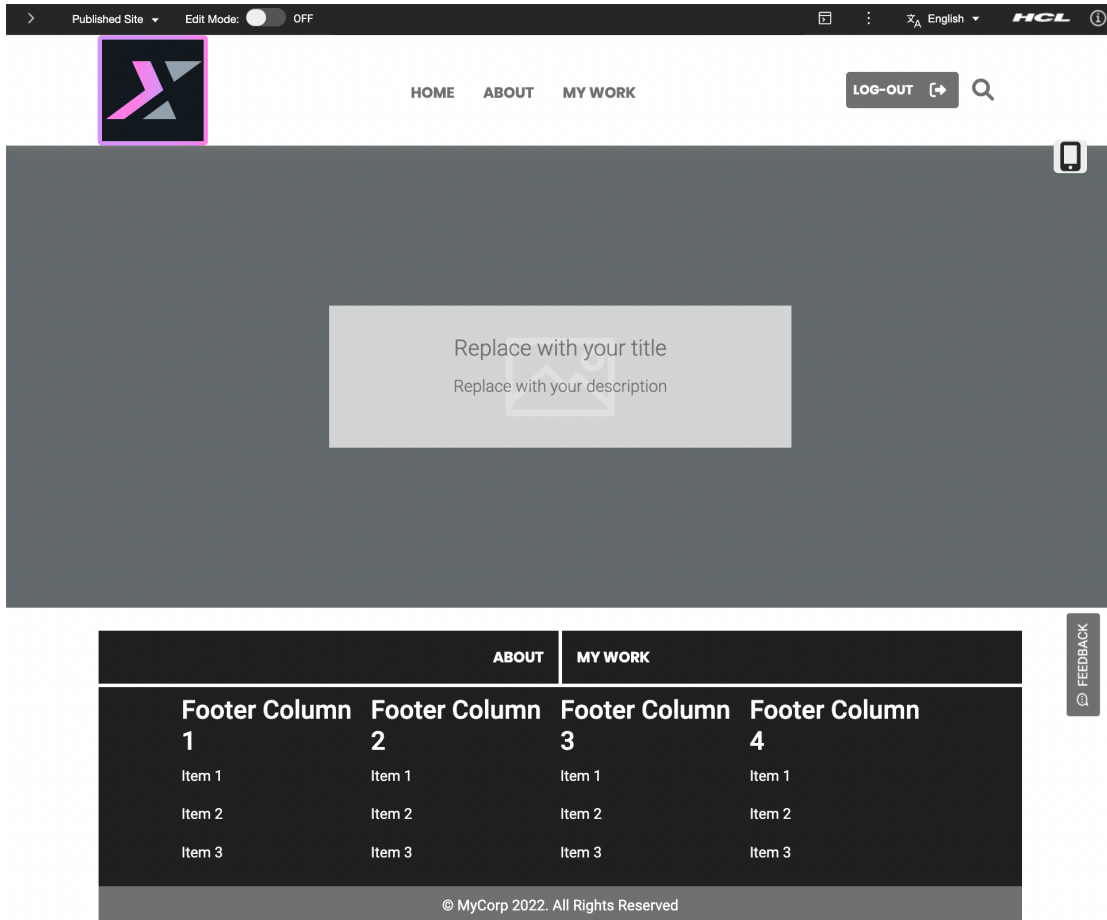
- And then you return to the Site Builder where you can watch the progress of the site. Once it ready, it appears under Completed. Now open it to see and start working on it. Click **Go to Site**.

### Site Builder

Create site builder templates for either a full website or a section of a website. Site builder templates include pages, content, page hierarchy, libraries, theme selection and more. The Content Template Catalog includes page templates for your immediate use, or you can create your own page templates. [Learn More](#)

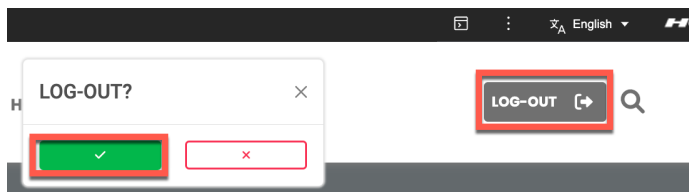


- And your site is ready for adapting it to the department. Notice the URL that is using the friendly URL you provided, with something like `https://<host>/wps/myportal/department-a`. You can bookmark it to find it back more easily.





20. Now log out to see if this site is not available for anonymous users. Click **LOG-OUT** and then confirm.



21. And you go back to the first site that is accessible as anonymous, the Demo Home Page.

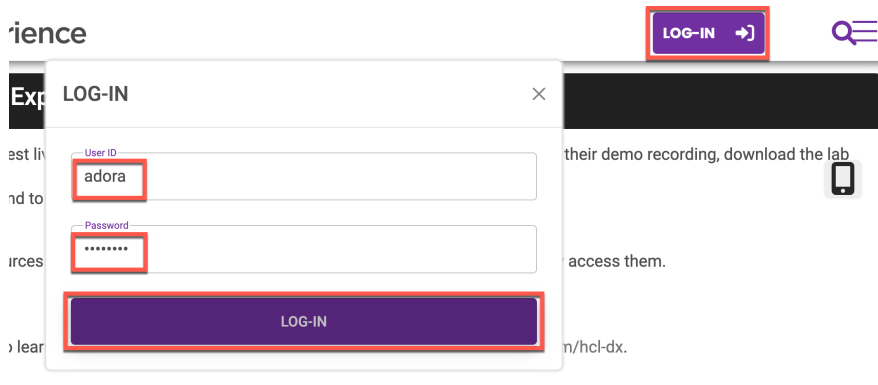


Congratulations! You have now created a new department site using a Site Template. The site is now ready to populate with content, applications and processes.

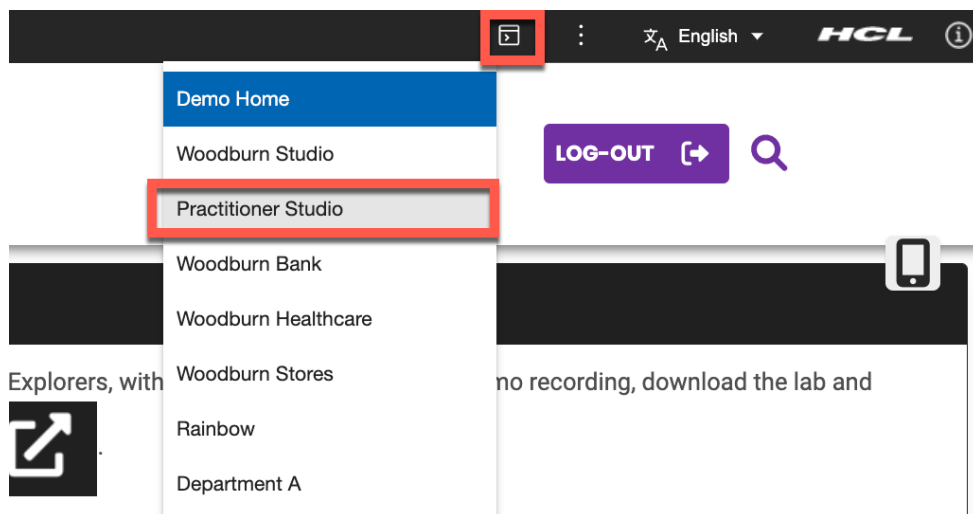
## Part 2: Create a News Section Template

Then you will create a new news section that you may use for your newly created site. Since this new section will be reused in other existing sites as well, future, you will first create a new news Section Template.

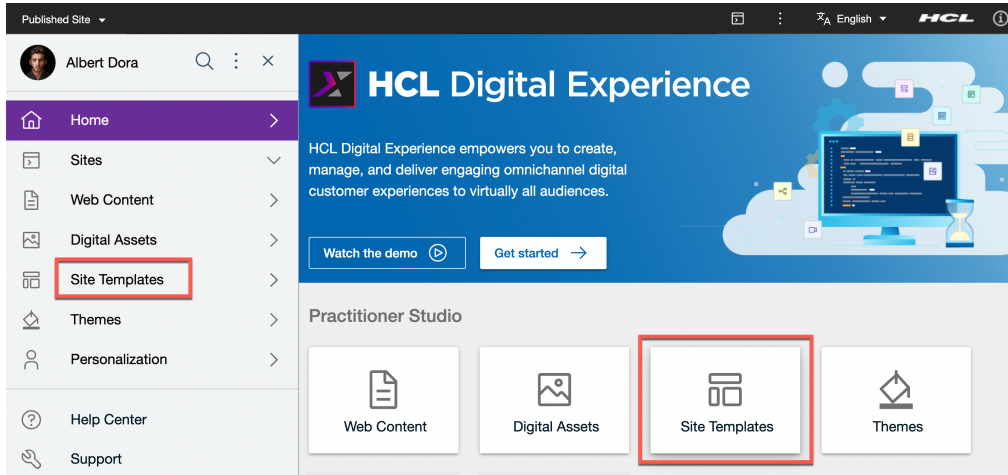
1. Log into again as Albert Dora, a Marketing Manager with Site Manager rights. Click **LOG-IN**, enter **User ID adora** and **Password HCL-Dem0** and click **LOG-IN**.



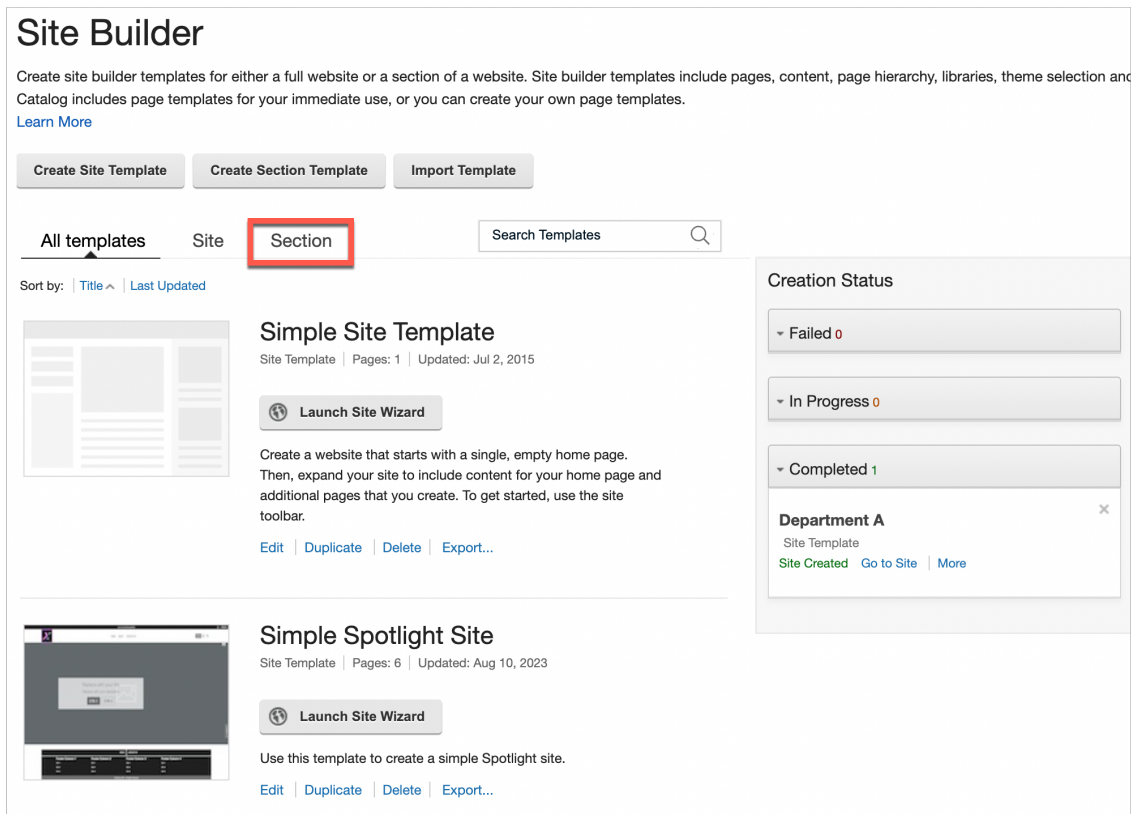
2. Then open the Practitioner Studio that gives you access to the Site Builder. Open the site menu and click **Practitioner Studio**. Notice that you can access your Department A site from here.



3. And select **Site Templates** again with any of these two options.



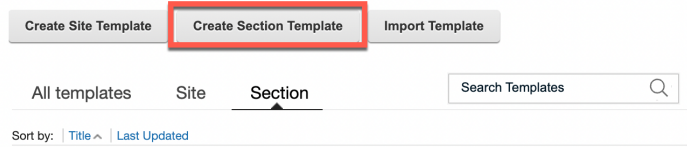
4. Notice you can edit, duplicate, delete and export these templates. You could have updated the existing Simple Spotlight Site and directly add the news there. However, as you may want to add also to other existing sites, you will create a section template. Click **Section** to see all available sections.



- As you can see, there are none. Now create your news section template. Click **Create Section Template**.

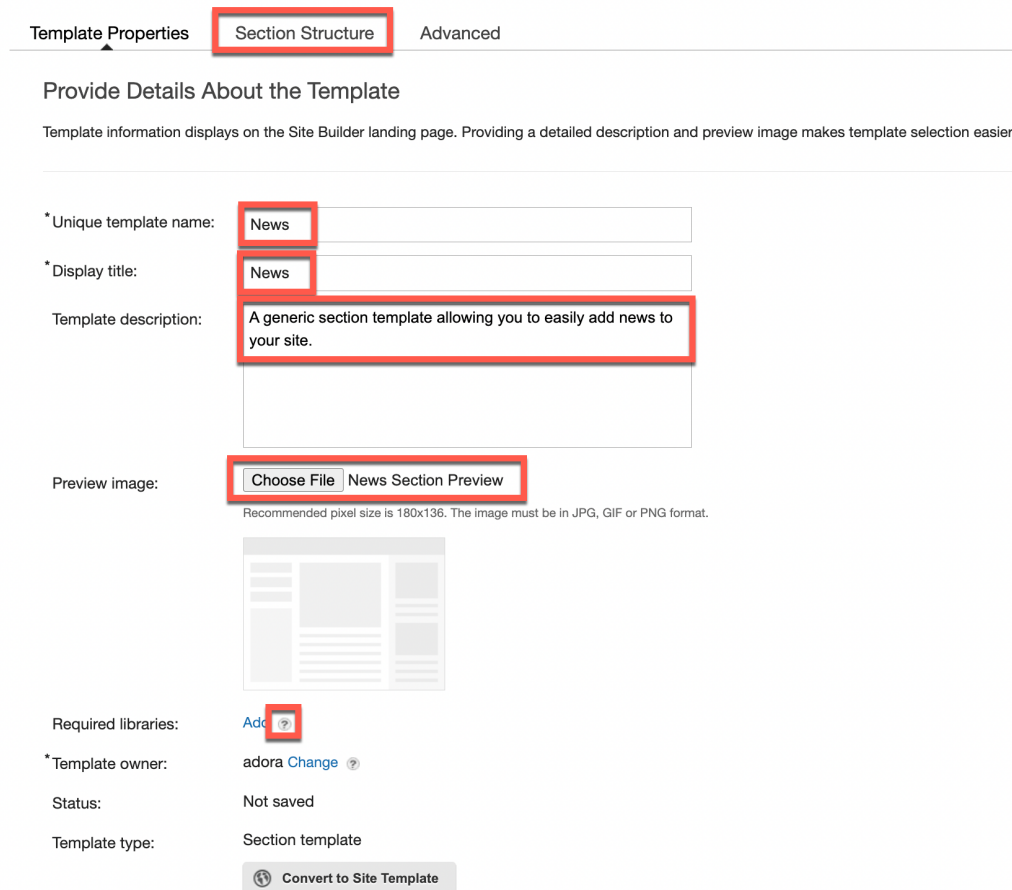
## Site Builder

Create site builder templates for either a full website or a section of a website. Site builder templates include page templates for your immediate use, or you can create your own page templates. [Learn More](#)



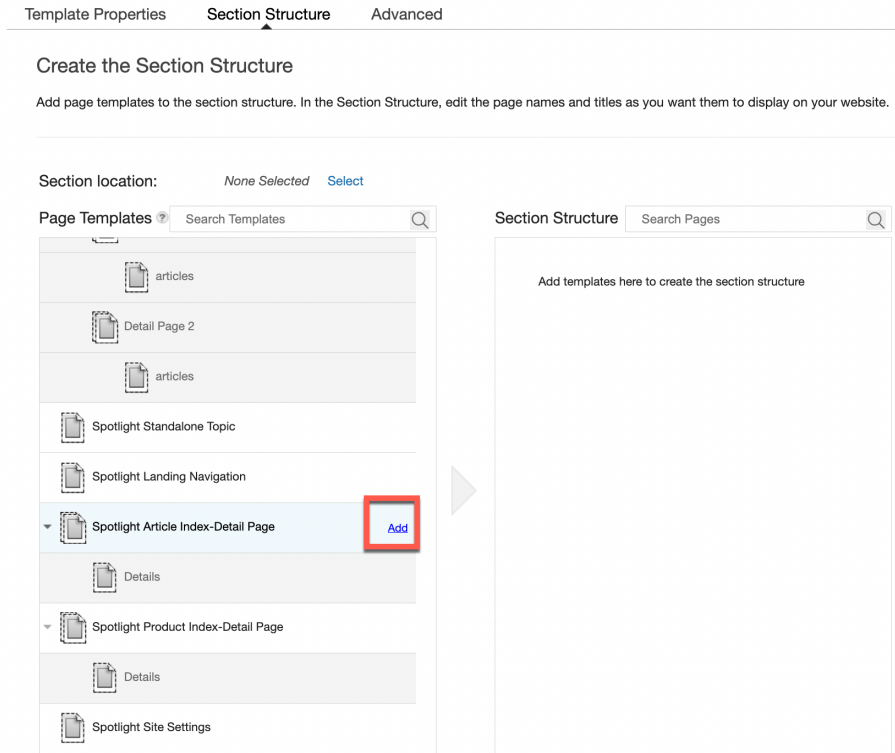
- First set the **Template Properties**. For **Unique template name** and **Display title** use **News**. Enter a **Template description**, like **A generic section template allowing you to easily add news to your site**. To help users identify the template visually, use the **News Section Preview.jpg** file from the Lab Resources as the **Preview image**. Alternatively, use one of your own. You can use the ? to learn more details on the additional options. Leave the remaining fields as they are. Then click **Section Structure**.

## Create Section Template

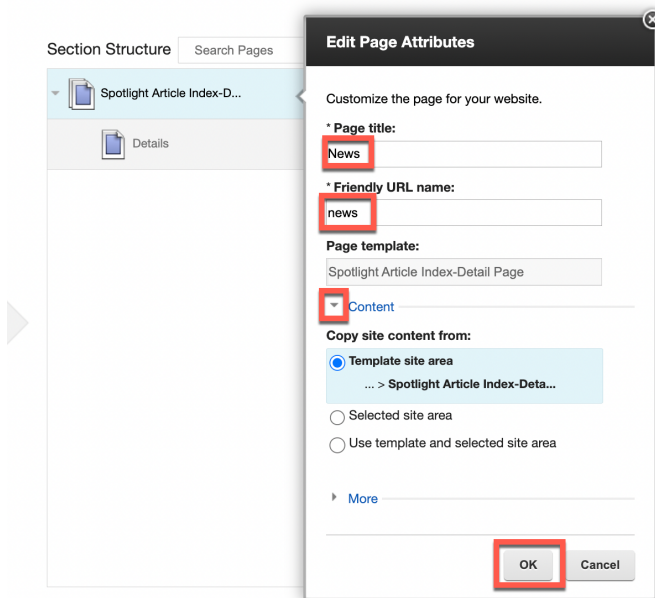


- This allows you to select page templates to add to the **Section Template**. You may also select a location for the template. Add the page template named **Spotlight Articles Index-Detail Page**. This is a page template with an index and corresponding child page that shows the details of articles. For news, you may use these articles as well. Hover over the section and click **Add**.

Create Section Template

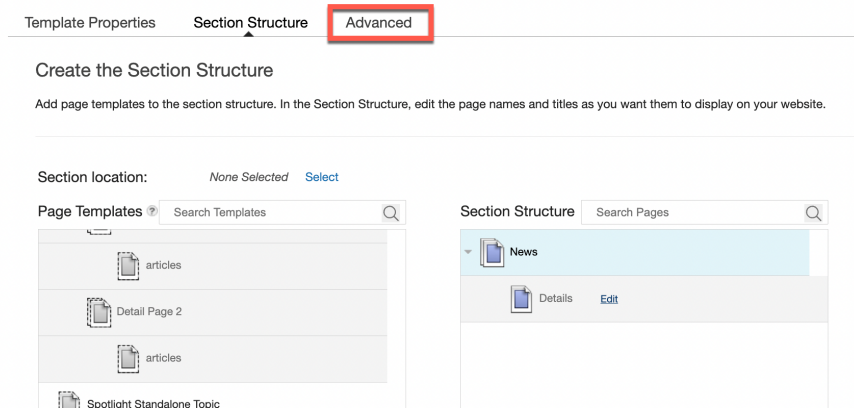


- Change the **Page Title** to simply **News** and **Friendly URL name** to **news**, as this is the default setting when adding the section template to a site. Check the additional content settings and do not change them. Then click **OK**.



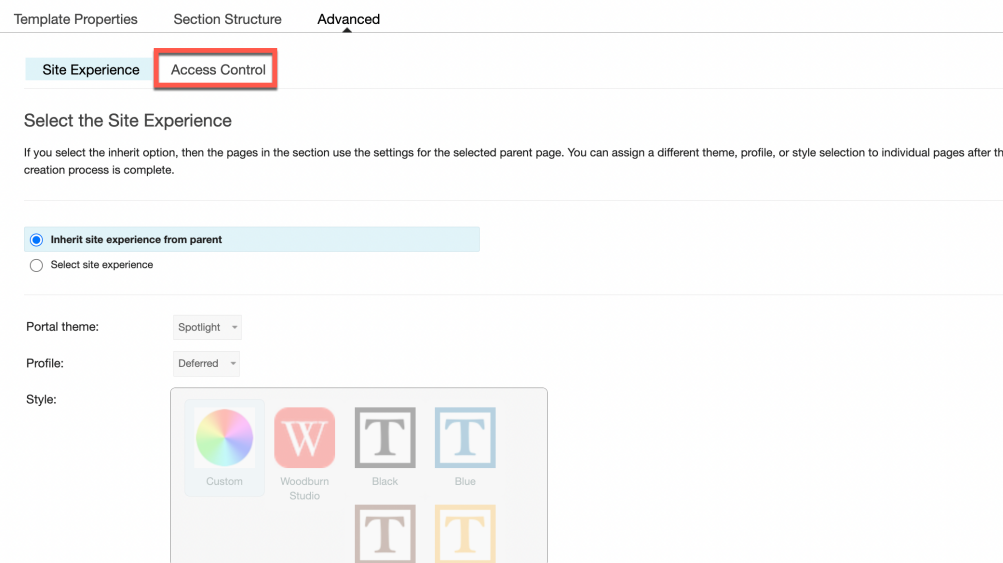
- Notice you can also update the corresponding Details page. You can keep it like that. Under the News page you may also add other page templates. In this case, you will just have the News and Details page. Click the **Advanced Tab**.

Create Section Template



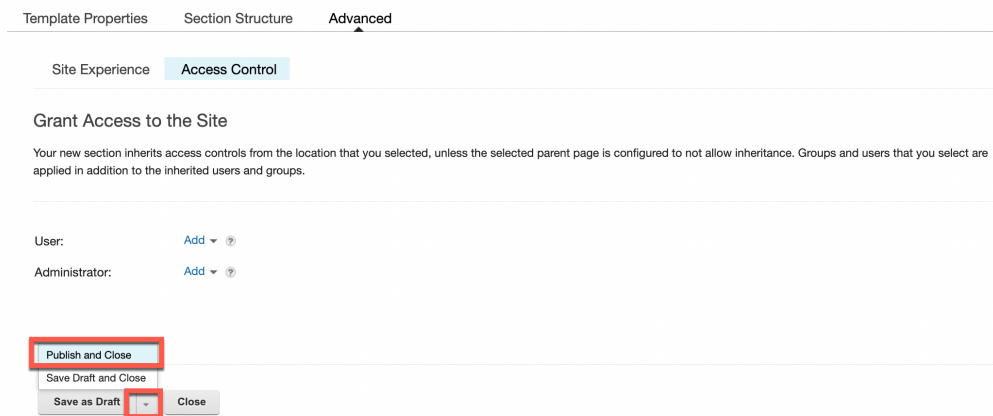
- Here you can adjust the site experience. Let it inherit from the parent page in the site where it will be added. Otherwise you have options to select a specific portal theme, profile, and style. Then check the access control. Click **Access control**.

Create Section Template



- Again, by default, it inherits the security from the parent. Leave it like that. Then publish it. Click **Publish and Close**.

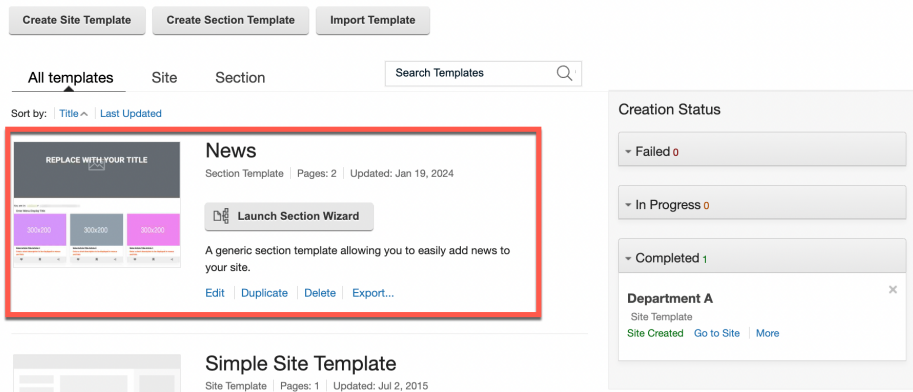
Create Section Template



- Your new **News** section template is available.

Site Builder

Create site builder templates for either a full website or a section of a website. Site builder templates include pages, content, page hierarchy, libraries, theme selection and more. The Content Template Catalog includes page templates for your immediate use, or you can create your own page templates. [Learn More](#)



You have successfully created a new News Section Template from a page template. It is now ready to be added to an existing site.

## Part 3: Add a News Section to Your Site

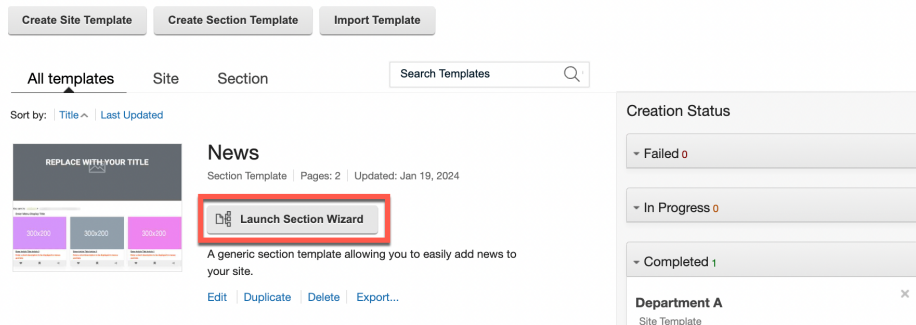
And then you will use your new News Section Template to add the news section to your newly created site.

1. Use your new News section template. Click **Launch Section Wizard**.

### Site Builder

Create site builder templates for either a full website or a section of a website. Site builder templates include pages, content, page hierarchy, libraries, theme selection and more. The Content Template Catalog includes page templates for your immediate use, or you can create your own page templates.

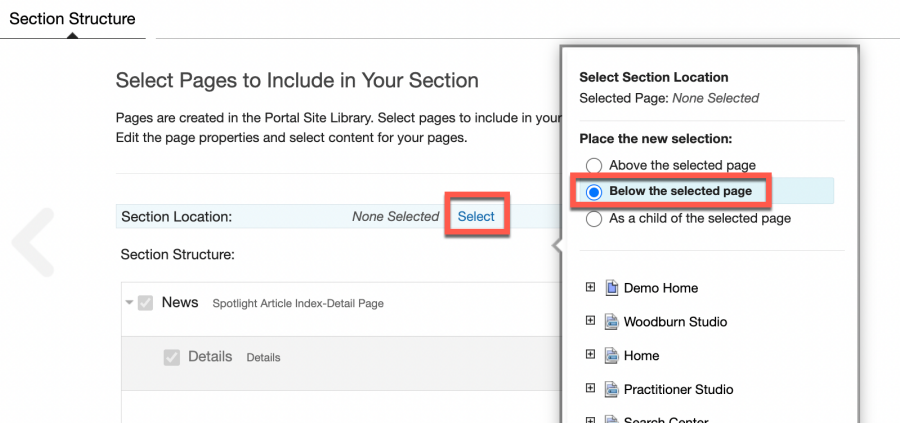
[Learn More](#)



2. You want to put this page right between the About and My Work. Click **Select** to select the location for this template. To put it after the About page, you need to change **Place the new selection** option to **Below the selected page** and then scroll down to select the About Us page.

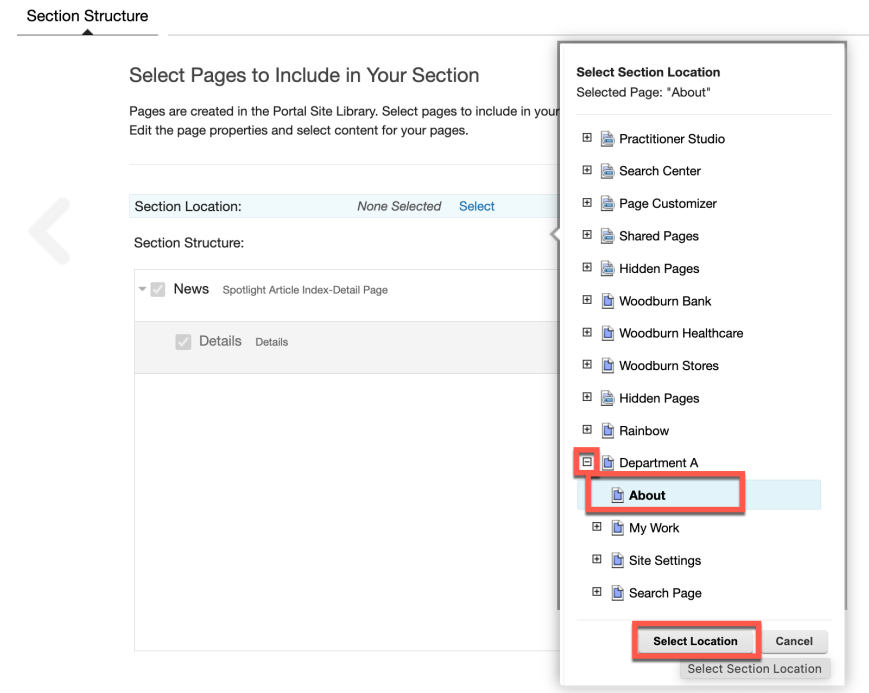
**i** You must select a location for the section. To select a location, click Select. Then, choose a page and how the section is placed relative to that page.

### Create a Section: News

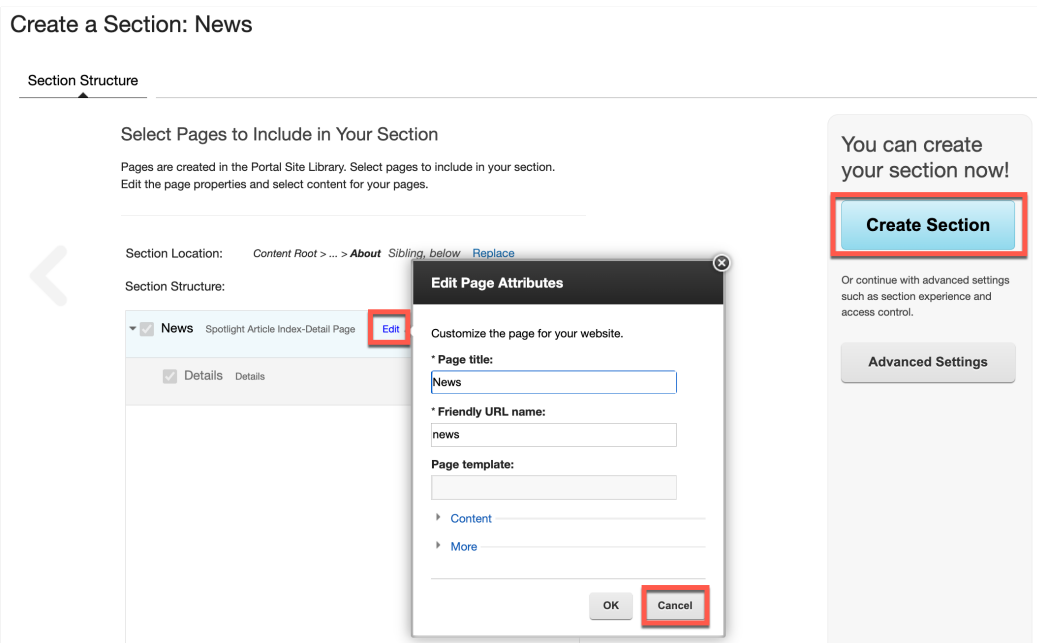




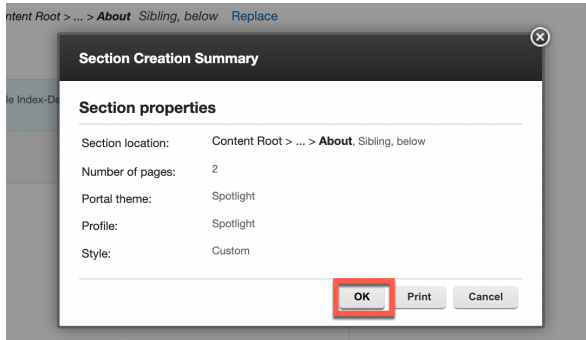
- Expand your **Department A** site, select the **About** page and click **Select Location**.  
Create a Section: News



- Notice it shows all the default settings of your News section template. You can check the page details and advanced settings. Do not make any changes. Then add the news section. Click **Create Section**.



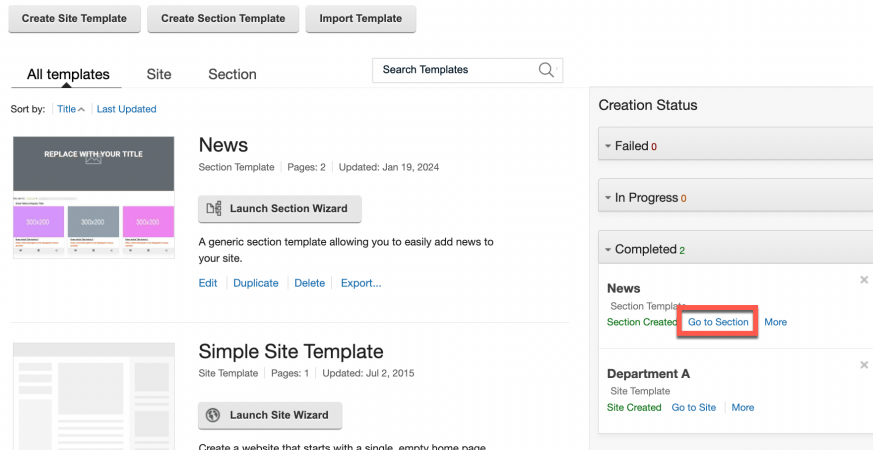
5. Check the section properties and click **OK**.



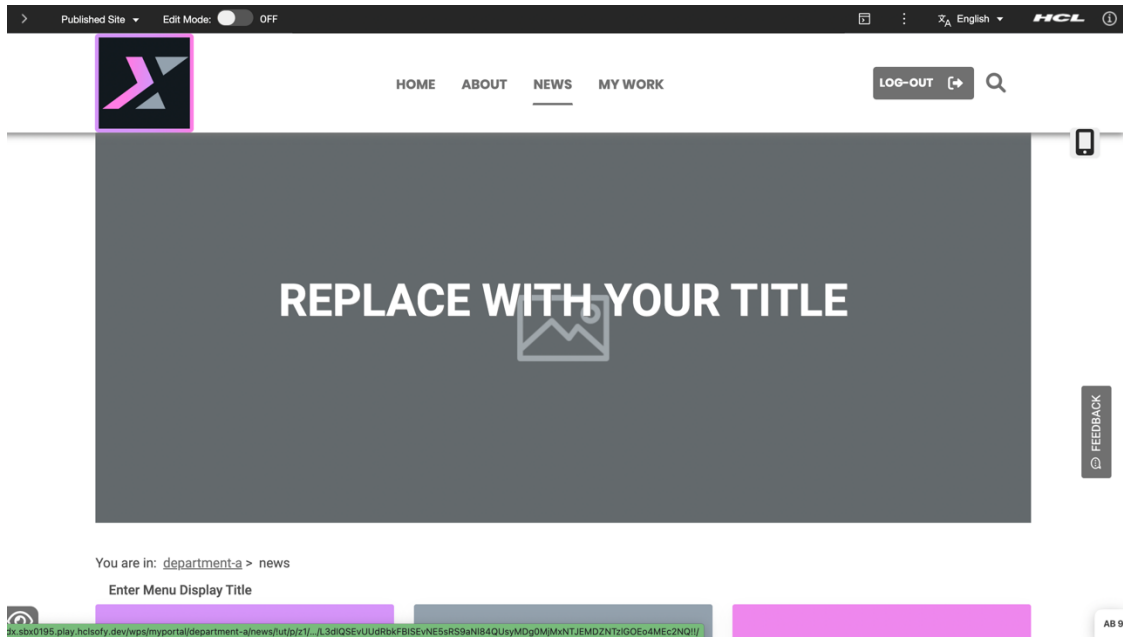
6. You are returned to the Site Builder where you can watch the progress of the creation. When it is completed, check it out on your site. Click **Go to Section**.

### Site Builder

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7. And this brings you directly to your new News page on your new site.

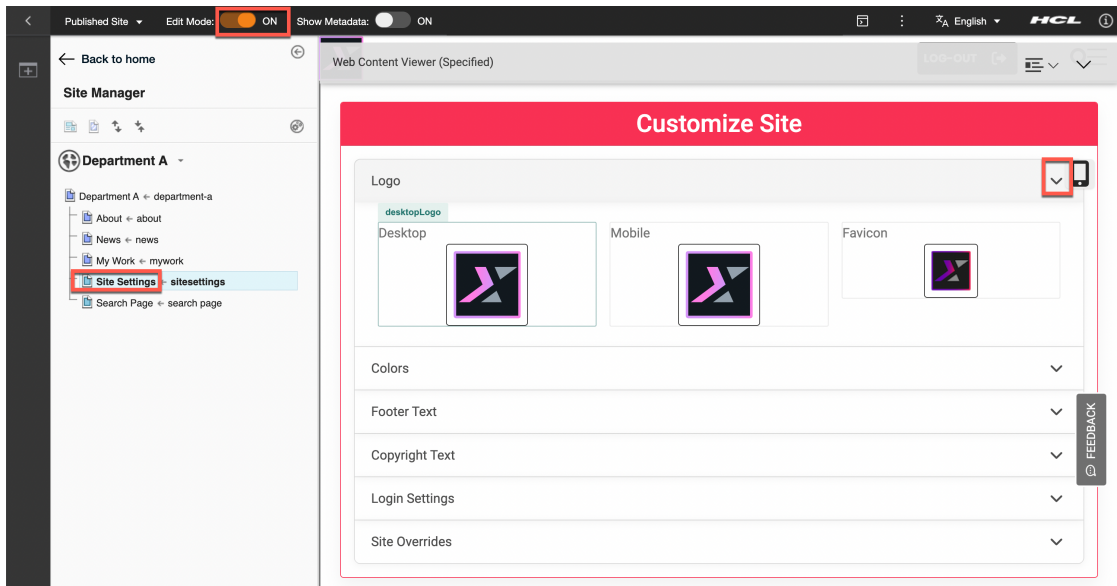


Congratulations! You have successfully added the News section to your site using your News Section Template! The site is now ready for further adapting it for your department.

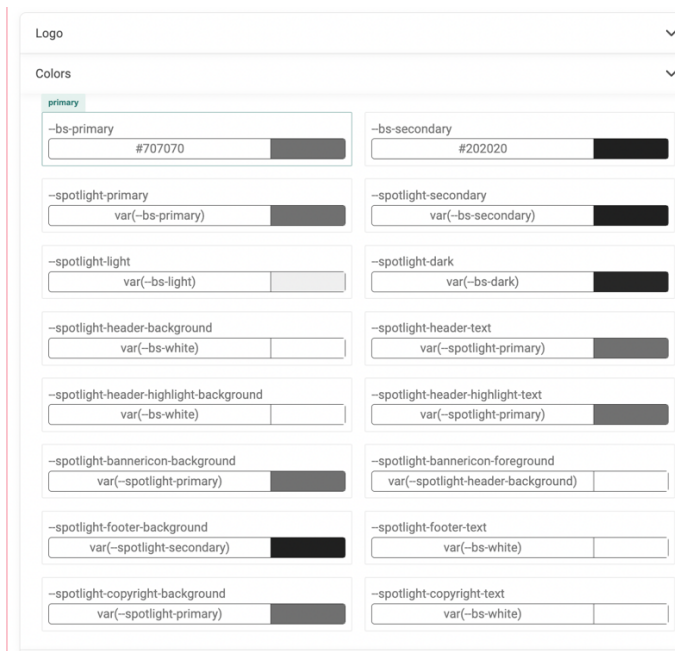
## Optional Part 4: Change the Site’s Look & Feel

If you are interested in how you could easily change the look and feel of your new site, you may use the site settings option made available by IT. It allows you to easily change the logo, colours, copyright and footer text, as well as other details.

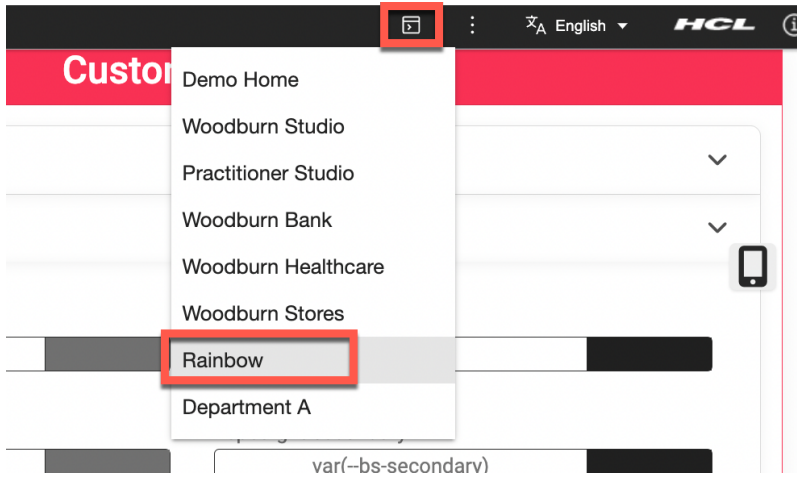
1. IT has prepared a hidden Site Settings page that allows you to easily configure many parts that control. First enable the Edit Mode, select this Site Settings page and you see several configuration options, like logo, colours, footer text, login settings and site overrides. Expand the logo section to see what different logos you may update. You may simply replace the desktop, mobile and the favicon logos.



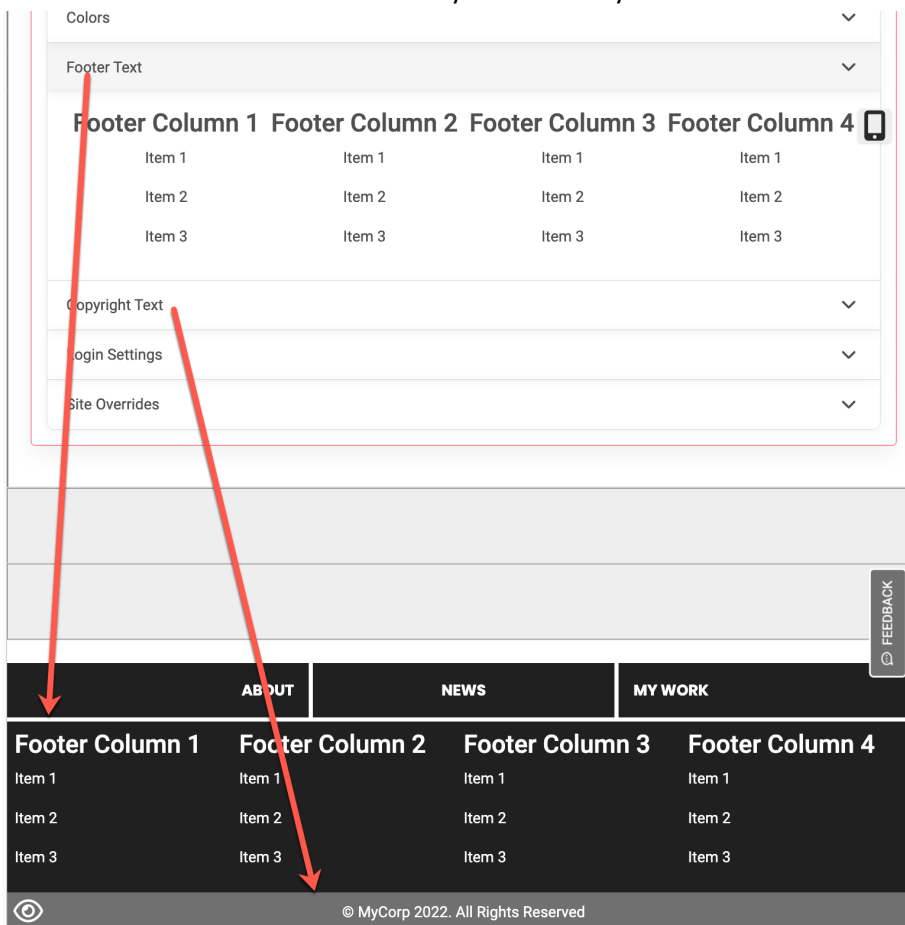
2. Then open the Colors section. The look and feel is based on Bootstrap and uses standard Bootstrap (bs) colours, see <https://getbootstrap.com/docs/5.3/customize/color/>, and specific IT ones, called Spotlight. You may change them and see how they apply to your site.



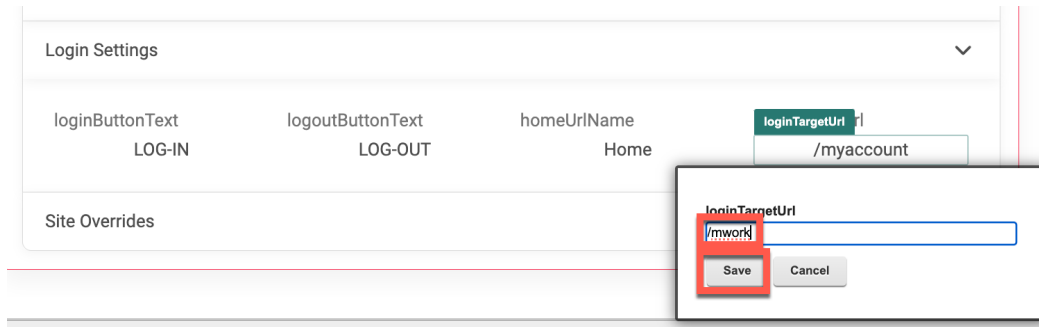
- While the names of these styles may be self-explaining, you may use the dedicated Rainbow site see how each of them applies to the header, footer and any of the page components. You can use the site menu to access this Rainbow site.



- You may also easily control the footer and copyright text with the Footer Text and Copyright Text sections. You see below how they look like on your site.



- The Login Settings allows you to customize the text to show on the login and logout buttons, the name of the home page, and to define where your users should be redirected to when they log in. As you have changed your default My Account page to My Work and its friendly URL to mywork, you should update the **loginTargetURL** URL to **/mywork**, if you want to redirect them to this dedicated page. You may also keep them on the home page. In that case, change it to **/**. Finally the Site Overrides is for advanced users how may override any CSS styling of the site. Feel free to try any of these Site Settings to adjust the look and feel to the one that fits your department.



You have successfully discovered how you may customize your site.

## Conclusion

Using this lab tutorial, you learned how easy and quick it is to create a new site using Site Builder templates on HCL DX. As Sara, you created a first department web site using the Simple Spotlight Site Template. You then were able to create a News Section Template which was then used to add the News section to your department web site.

And you may have learned how you could further customize your site as a business user.

## 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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