



HDX-BU-200

Site Manager Lab

HCLSoftware U

Creating a new generation of experts

Edition : March 2024

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Author(s)

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Bio

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Introduction

In this hands-on lab, you will explore more advanced topics you may do using the Site Manager. Albert, as a manager, needs to make several updates to the site. The Pharmacy page needs to be reordered and have its description updated to indicate that it is still being built. This will show in the search engine results. In addition, you need to rearrange the page components on the homepage, add an advertising for a new mobile application to download and make this only visible to mobile devices.

In this DX user lab, you will play the role of Albert, a marketing manager.



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

As Albert, a marketing manager with site manager rights, you will move a page, edit its description, move page components, add a page component that you will complete using a Word document, ensure it is accessible, target it for mobile devices only and test it.

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 Healthcare, while in HDX-BU-100 you learn how to use the Site Manager.
2. Have a running DX instance. The lab is using the DX Solution Modules in HCL SoFy (<https://hclsofy.com/catalog/dx-solution-modules>) with its Woodburn Healthcare site. Note that if using your own instance, you will need to adjust the lab steps 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 Albert	adora	HCL-Dem0

Lab Overview

In this lab, there are three different parts that let you work with more advanced Site Manager capabilities. These are shortly introduced now.

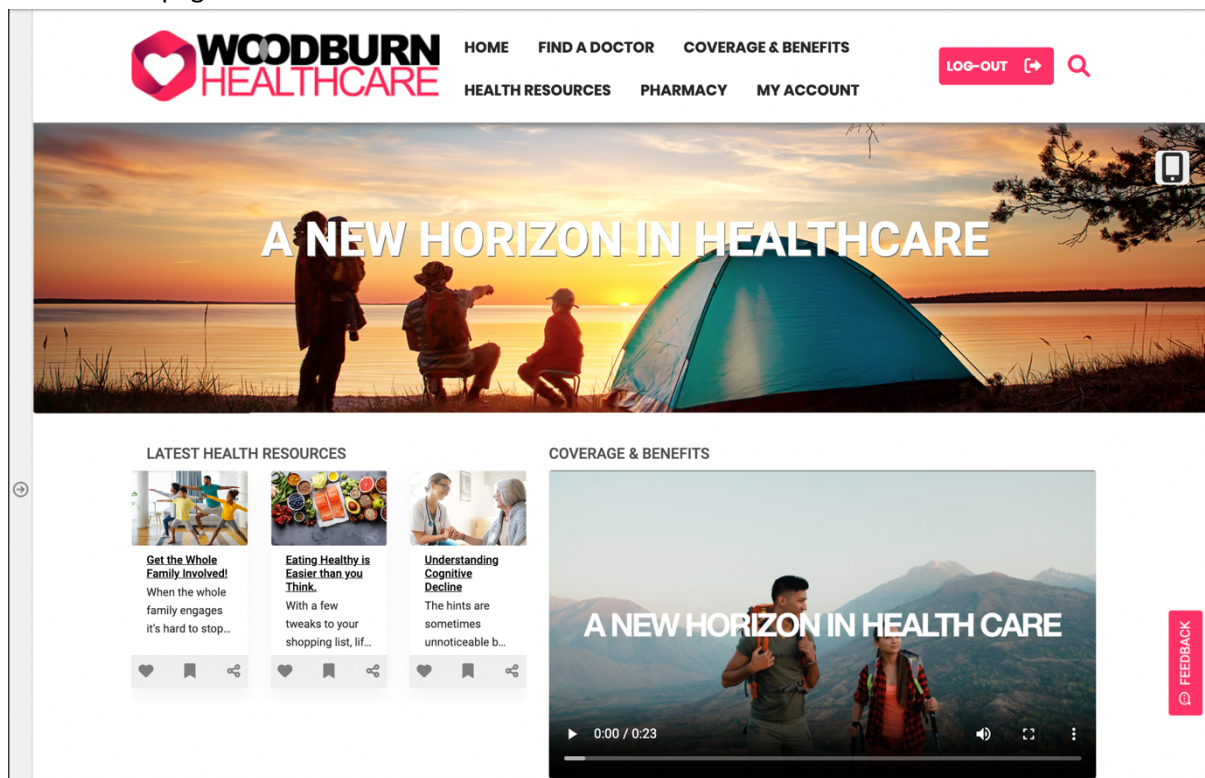
Part 1: Move Pharmacy Page and Update Page Description

As Albert, a Marketing Manager with Site Manager rights, you will move the Pharmacy page to after Health Resources and update its meta-data for search description to indicate it is still under construction and will be fully available soon.



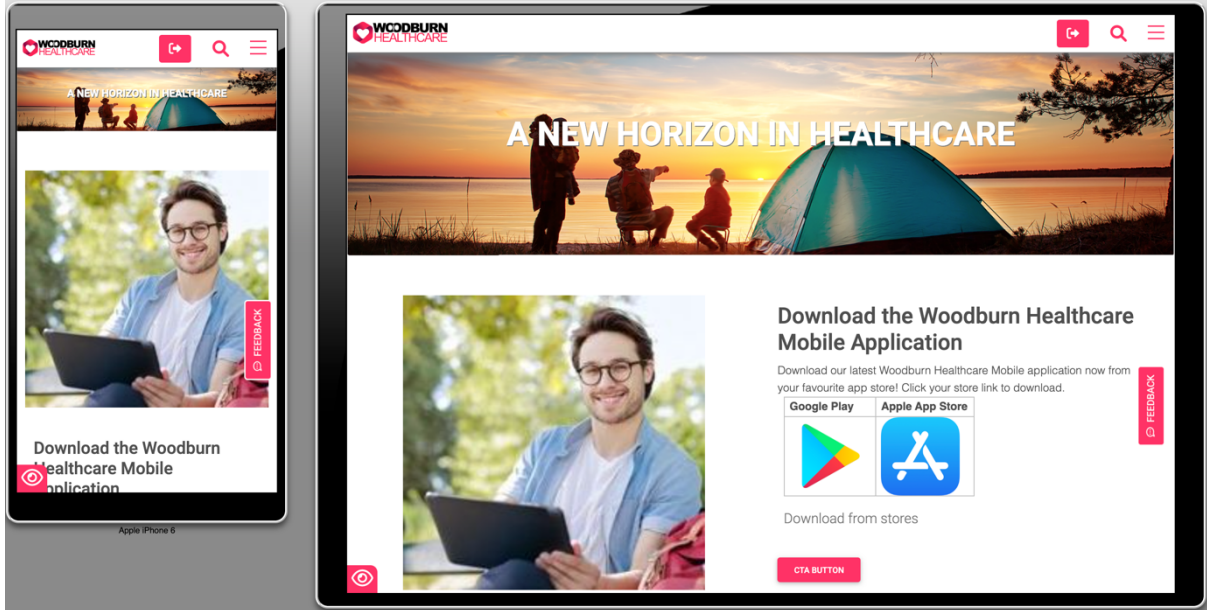
Part 2: Reorganize the Home Page

Then, you need to swap the Latest Health Resources with the Coverage & Benefits page components on the homepage.



Part 3: Advertise a New Mobile App to Mobile Users using an MS Word Document

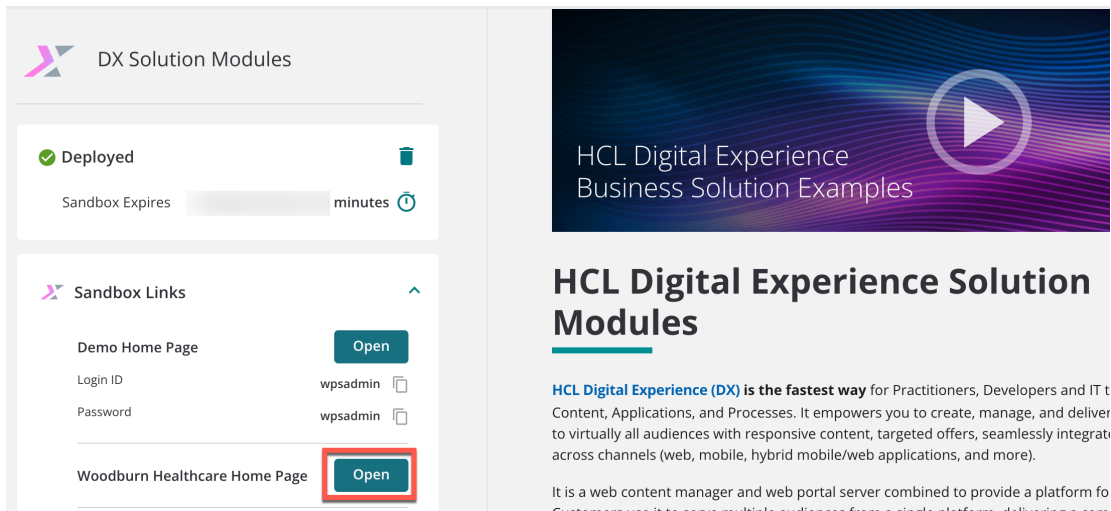
And you need to advertise a new mobile application that your users may download. You will use an image and MS Word document to create this. Then you will test if it is accessible, make any corrections, then target this to be visible to mobile users only and test if it works.



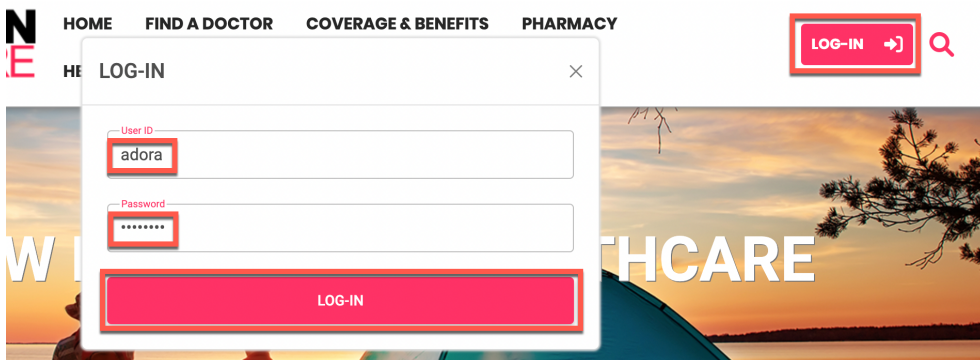
Part 1: Move Pharmacy Page and Update Page Description

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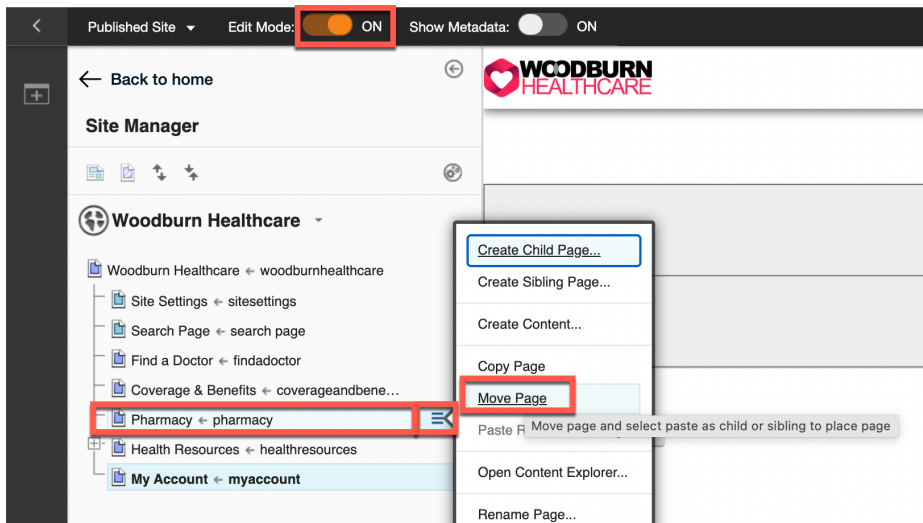
1. Go to the home page of Woodburn Healthcare first. On the server where the DX Solution Modules has been installed, next to **Woodburn Healthcare Home Page**, click **Open**.



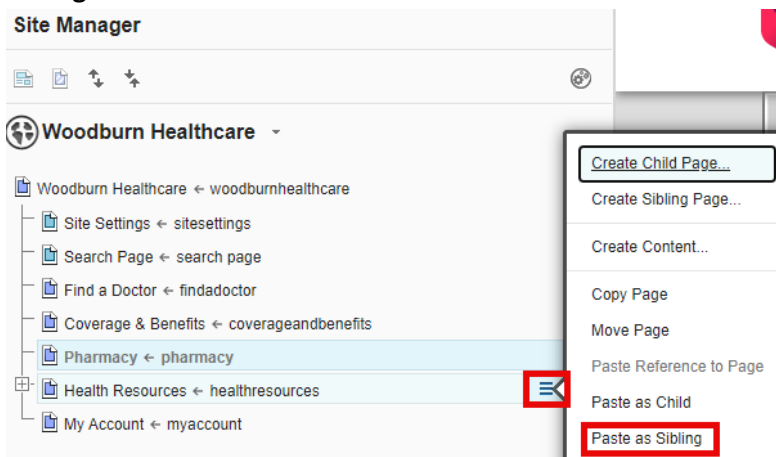
2. You see that the Pharmacy page now shows before the Health Resources one. You need to reverse them. Log in as Albert, a Marketing Manager. Click **LOG-IN**, enter User ID **adora** and Password **HCL-Dem0** and click **LOG-IN**.



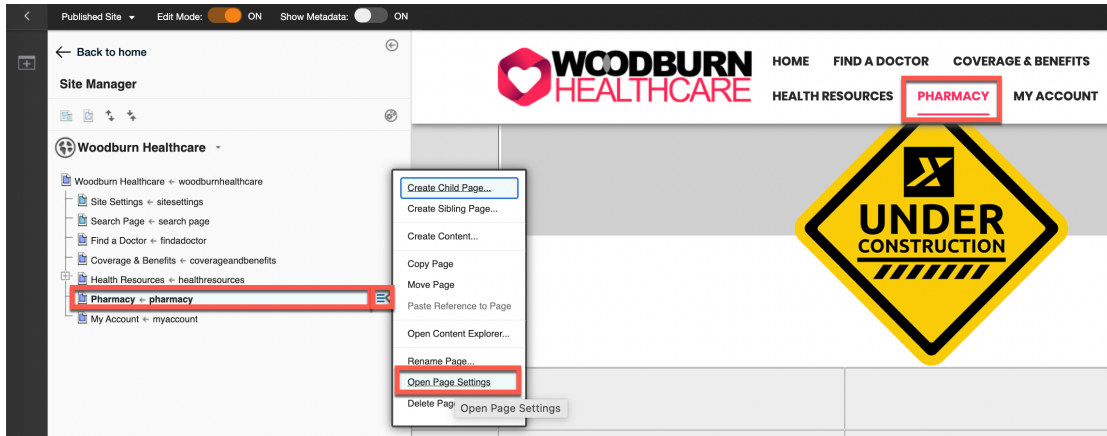
3. Enable the **Edit Mode**. Then open the context menu for **Pharmacy** page. As you have site manager rights, you can easily create and manage content under it, and copy, rename and delete the page. Now move the Pharmacy page to after the Health Resources one, on the same level. Click **Move Page**.



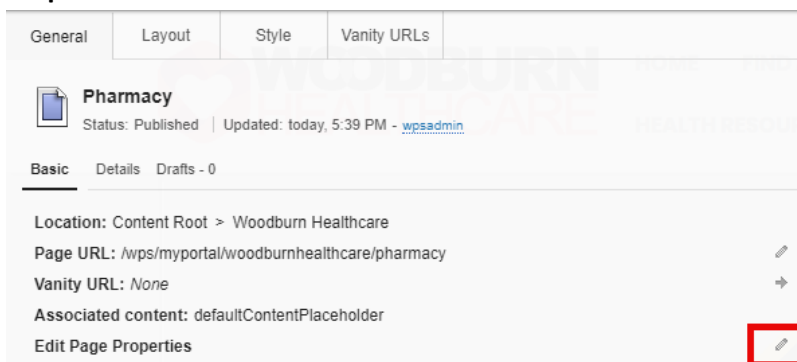
4. You need to paste it as a sibling, to keep it on the same level. Notice you can also paste it as a child page. Open the context menu for the **Health Resources** page and click **Paste as Sibling**.



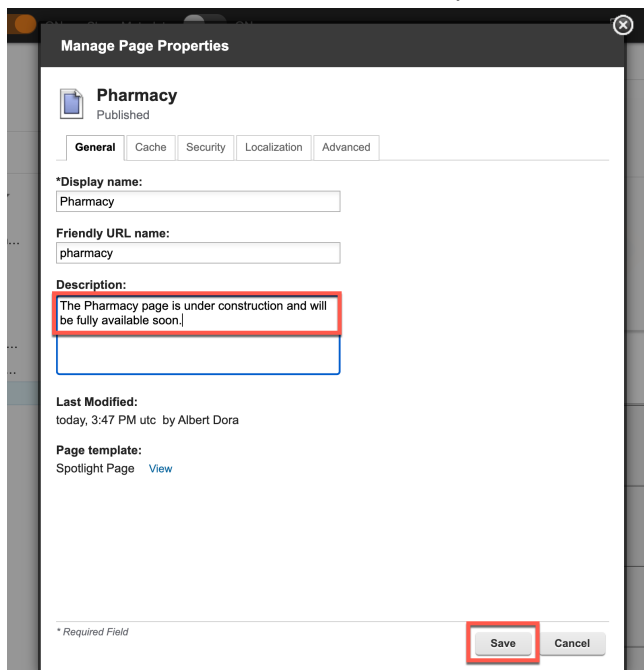
- The Pharmacy page now shows after Health Resources. Next you want to update the page description to ensure search engines will show that this page is in construction as well. While you can easily update the page name and friendly URL using the Rename Page option, the description is managed under the Page Settings. Open the context menu and click **Open Page Settings**.



- This shows you the general settings. You may have a look at the above tabs for layout, style and vanity URLs. You edit the page description under the page properties. Click the **Edit Page Properties** button.



- Under the General tab, you can again manage the page display title, friendly URL and also the description. Notice the other options to manage the cache, security, localization and advanced page settings. You will learn these in advanced courses. Then enter the description **The Pharmacy page is under construction and will be fully available soon.** and click **Save**. This will be picked up automatically by the built-in and external search engines and will help users understand that it will be shortly available.



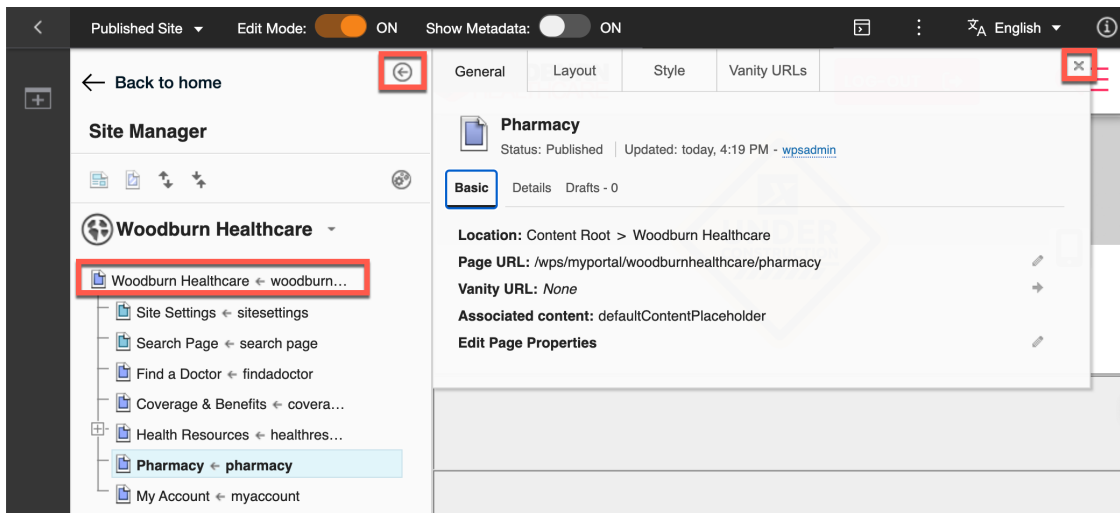
The screenshot shows the 'Manage Page Properties' dialog for a page named 'Pharmacy'. The 'General' tab is selected. The 'Display name' is 'Pharmacy', the 'Friendly URL name' is 'pharmacy', and the 'Description' is 'The Pharmacy page is under construction and will be fully available soon.' The 'Save' button is highlighted with a red box.

Congratulations! You have successfully moved the Pharmacy page and added a description that is now going to be picked up by search engines.

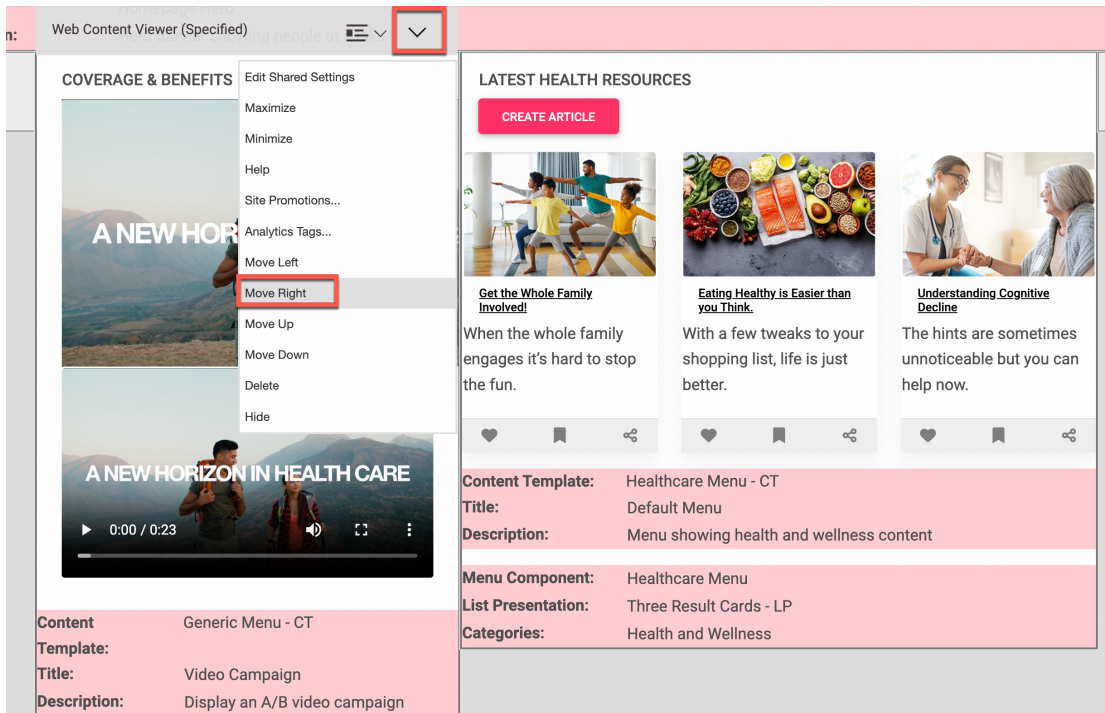
Part 2: Reorganize the Home Page

Then, as Albert, you need to swap the Latest Health Resources with the Coverage & Benefits page components on the homepage.

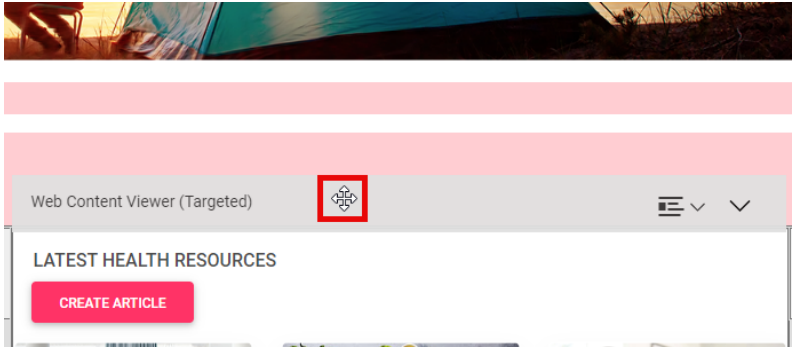
1. Close the secondary navigation for page settings and navigate to the Home page of the Woodburn Healthcare site. Click **Woodburn Healthcare**. Then collapse the site manager to have more space to manage the page.



2. Scroll down to the **Coverage & Benefits Video Campaign** component and move this to the right. Open the portlet menu and click **Move Right**.



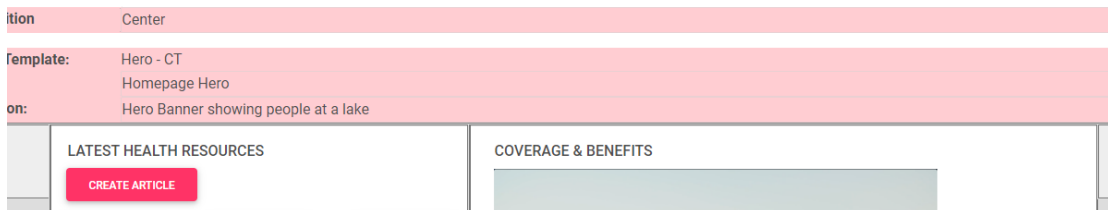
- This puts it below the **Latest Health Resources** component. Move this Latest Health Resources component to the left. In this case, hover over the top of the Latest Health Resources component and notice your mouse icon becomes these four arrows move icon.



- Use this to drag and drop the Latest Health Resources component to the left column. A green box shows to indicate you are moving it to a valid destination.



- It now shows the Latest Health Resources on the left and your Coverage & Benefits on the right.

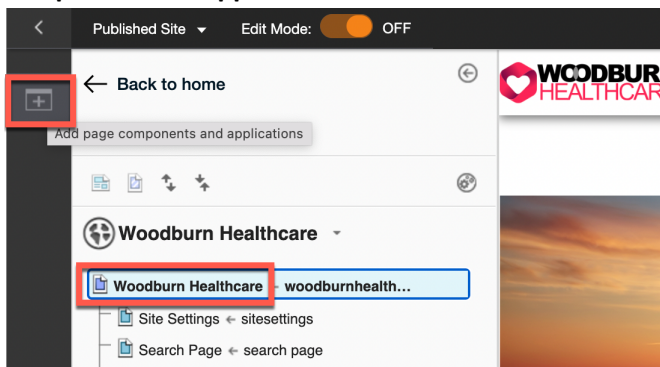


Congratulations! You have successfully rearranged the components on the homepage using the two ways.

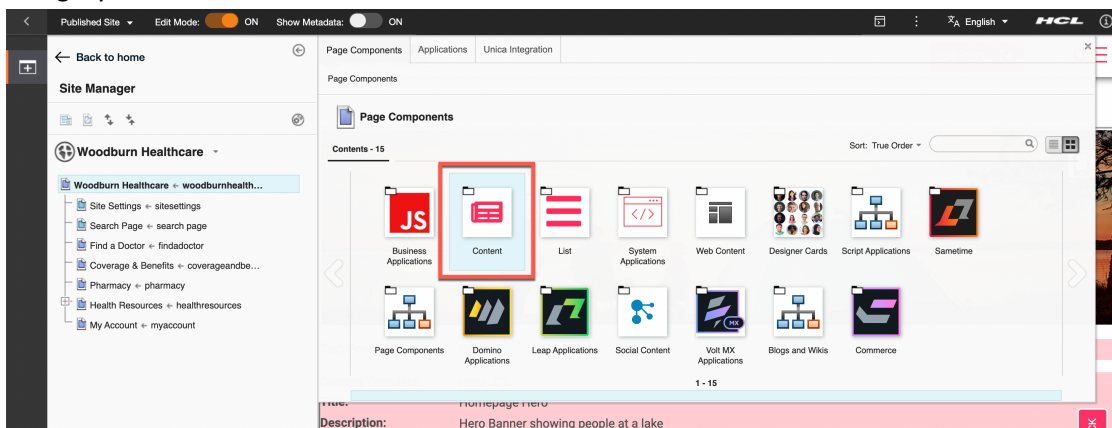
Part 3: Advertise a New Mobile App to Mobile Users using an MS Word Document

Then you need to advertise a new mobile application that your users may download. You will use an image and MS Word document to create this. Then you will test if it is accessible, make any corrections, then target this to be visible to mobile users only and test if it works.

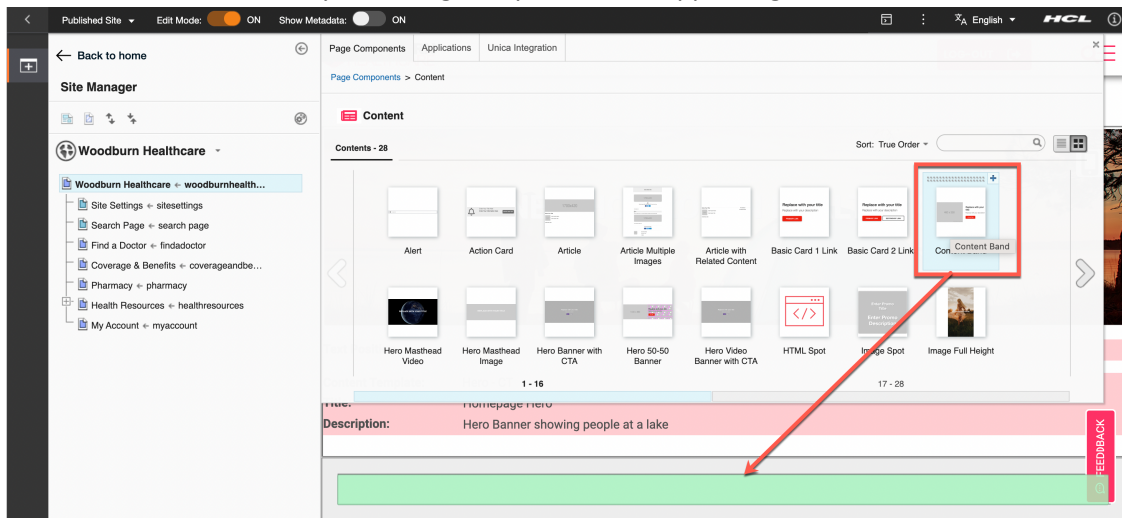
1. Albert wants to advertise the availability of a new mobile application. Ensure Edit Mode is enabled. Navigate to the home page for Woodburn Healthcare and click the **Add a page component and applications** icon.



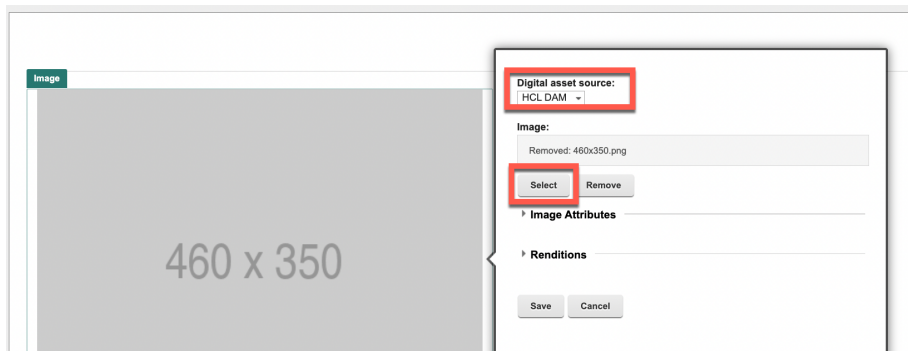
2. Notice there many out of the box page components for Business Applications, Content, List, integration with HCL Software and more. You may look around. Then open the Content category. Click **Content**.



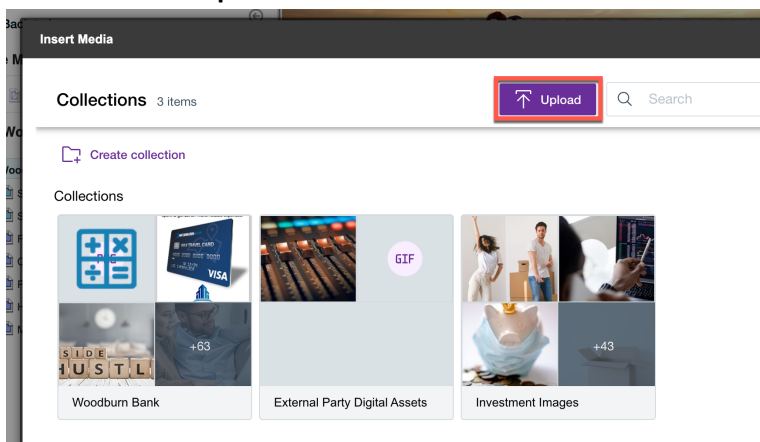
- You may have a look at any of them. You can directly see how they will appear on your site. In this case a content that allows you to use an image and some rich text. This can be achieved using the Content Band. Select the **Content Band** and drag & drop it under the current Hero Panel where you see a green placeholder appearing.



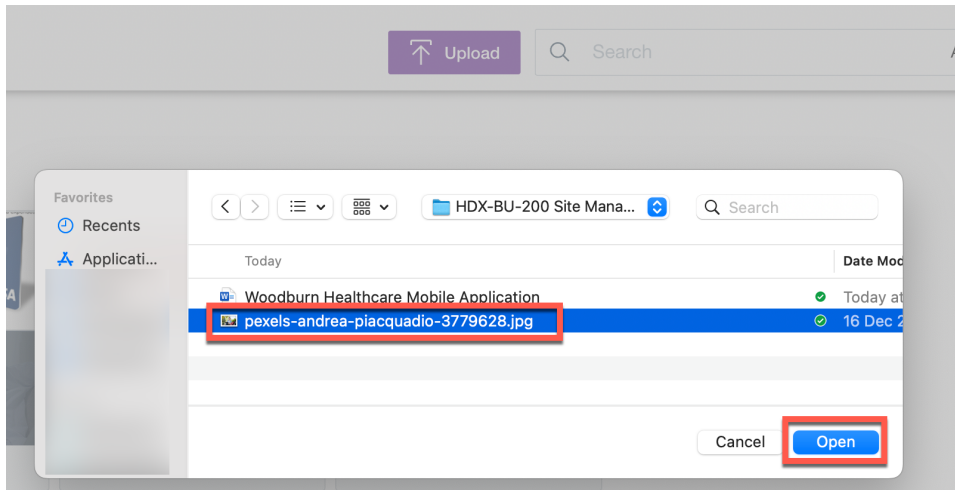
- Then add a nice image to the DAM and use it to grab the attention of your members. Select the image to change, change the **Digital Asset source** to **HCL DAM** and then click **Select** to open the DAM media picker.



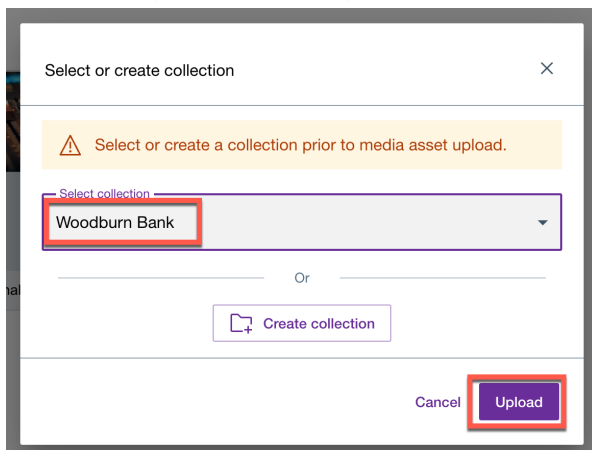
- Then select a nice image that she uploads to the DAM. You may take it from the downloaded resources. Click **Upload**.



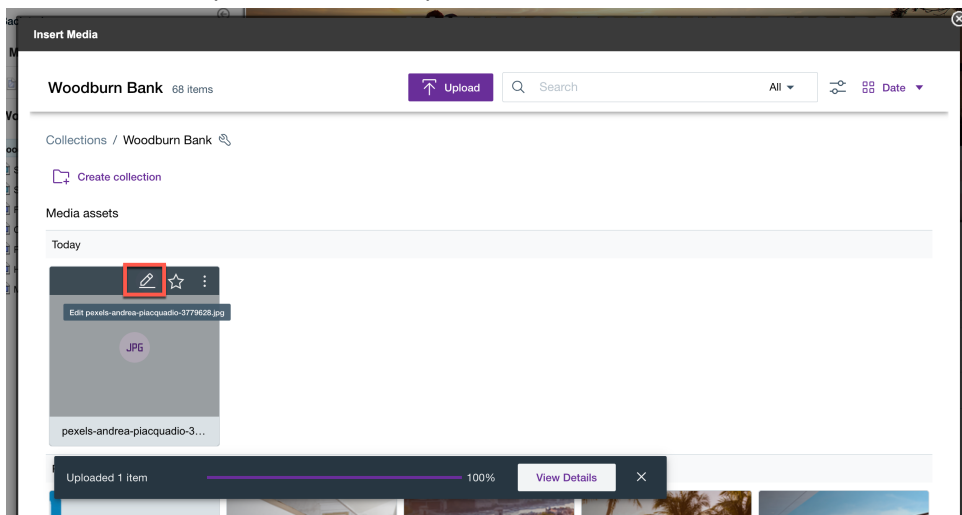
6. Select the right image, e.g. the sample image you downloaded and click **Open**.



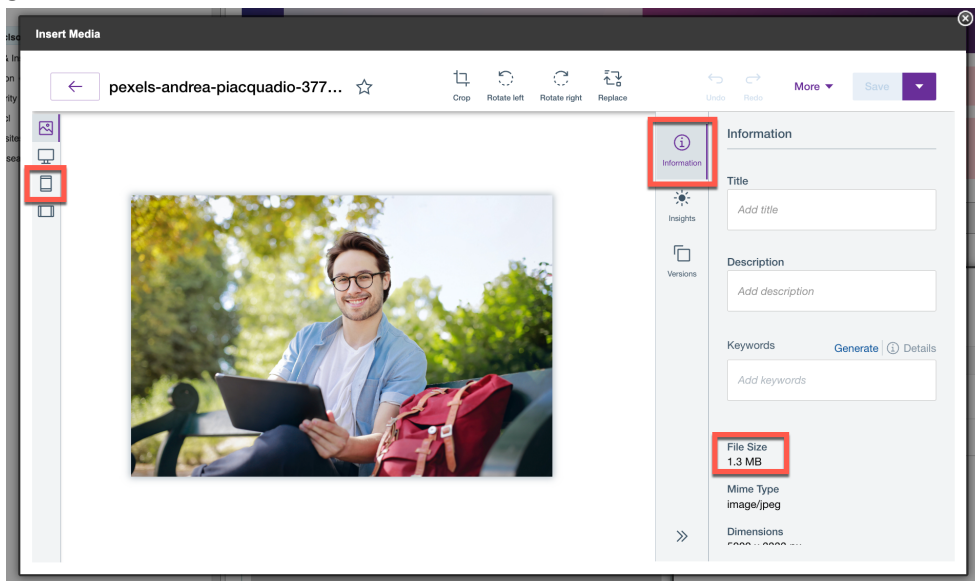
7. Then select (or create a new) collection, for example **Woodburn Bank**. Then click **Upload**.



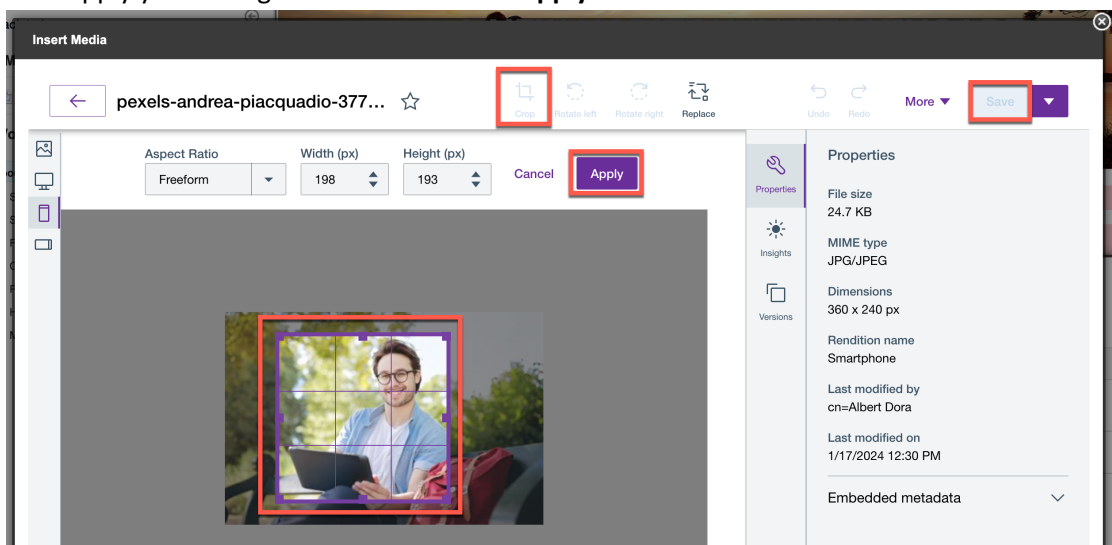
8. And edit it to adapt it for the smartphone. Click the Edit icon.



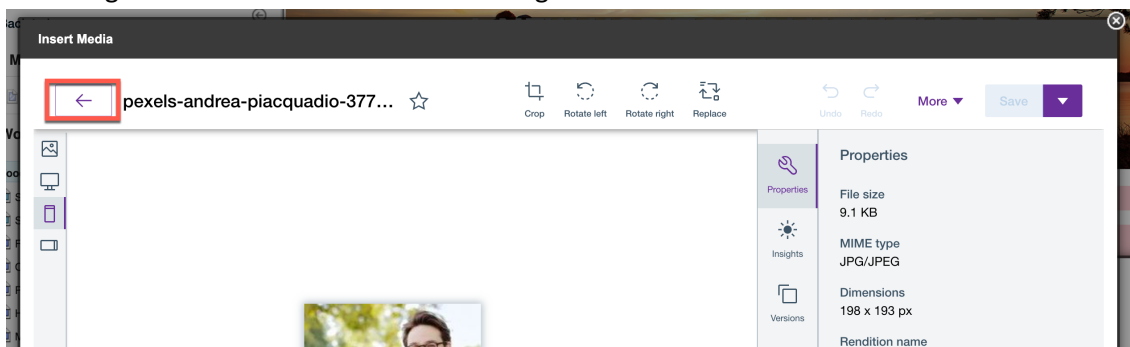
- Then open the Information and check the current file size. Then go to the automatically generated rendition for the SmartPhone.



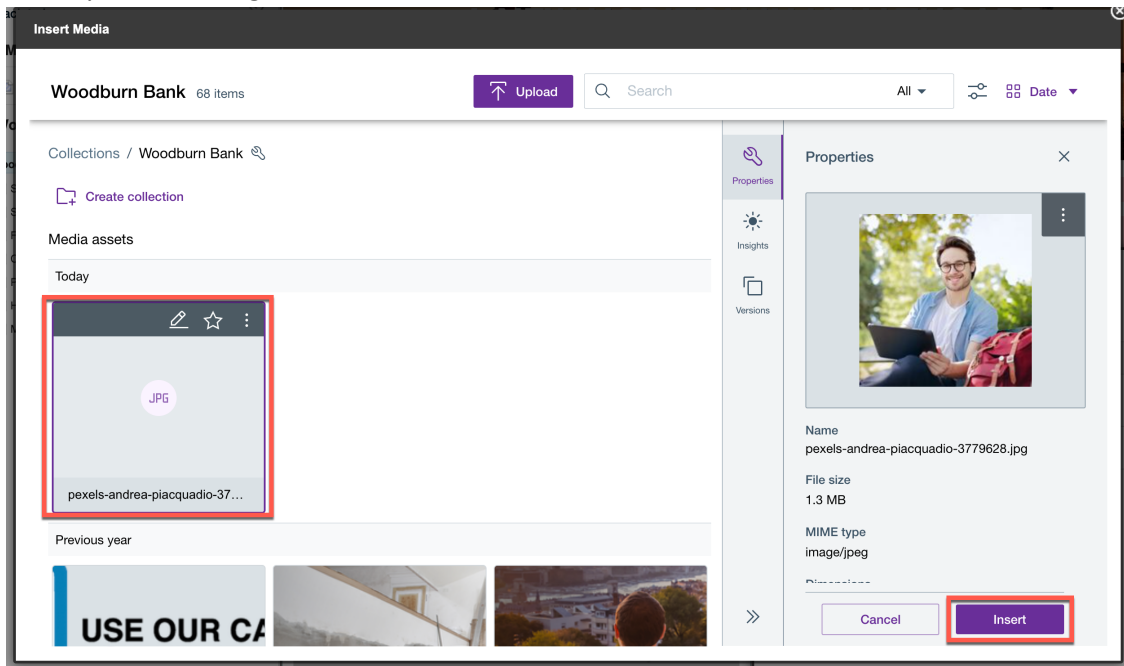
- Use the crop function to focus more on the happy person with his mobile outside with likely no connection and running our new application offline. Notice the much smaller file size and then apply your changes and saves it. Click **Apply** and then **Save**.



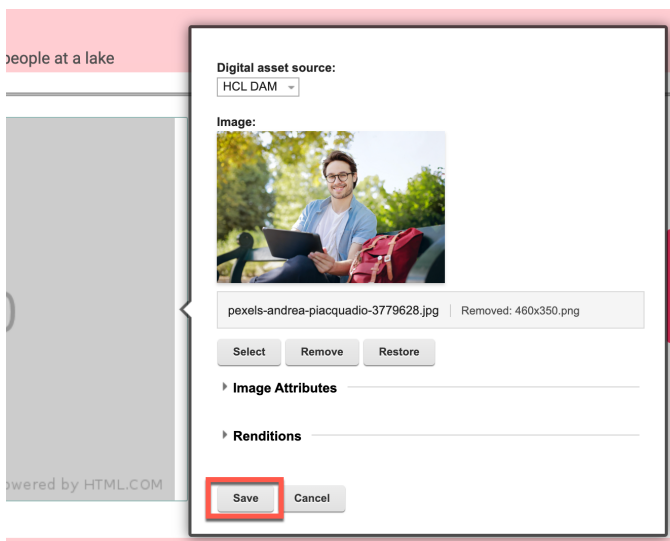
- Notice again the even smaller file size. Then go back.



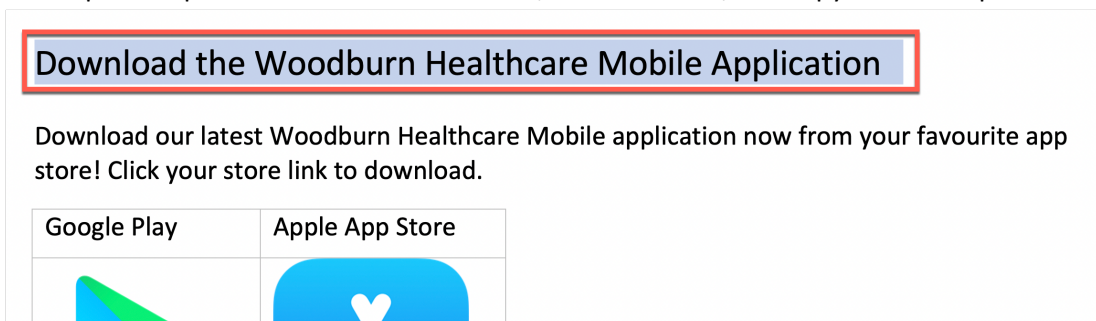
12. Select your new image and insert it. Click **Insert**.



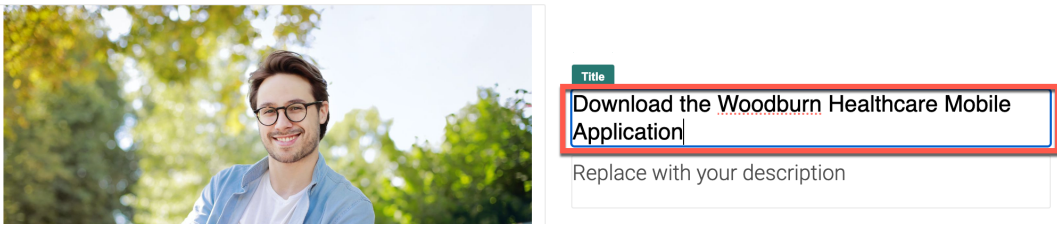
13. Double check and save it. Click **Save**.



14. Then open the provided MS Word document, select the title, and copy it to the clipboard.

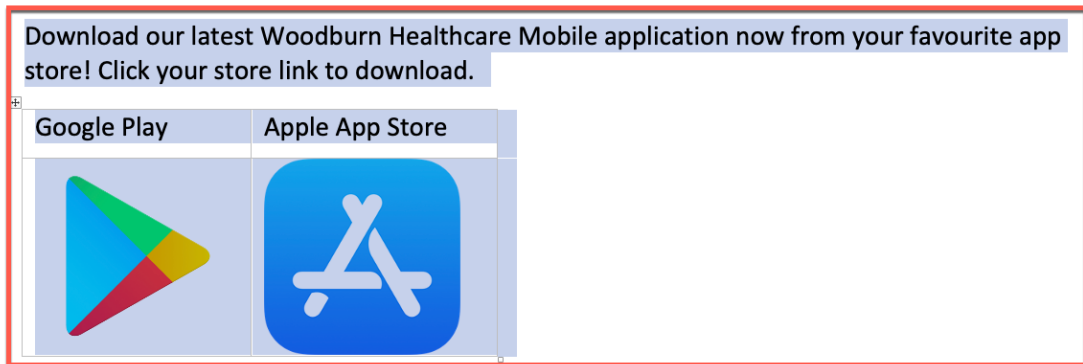


15. And paste it in the title. Notice how it gets updated to the right look and feel automatically.

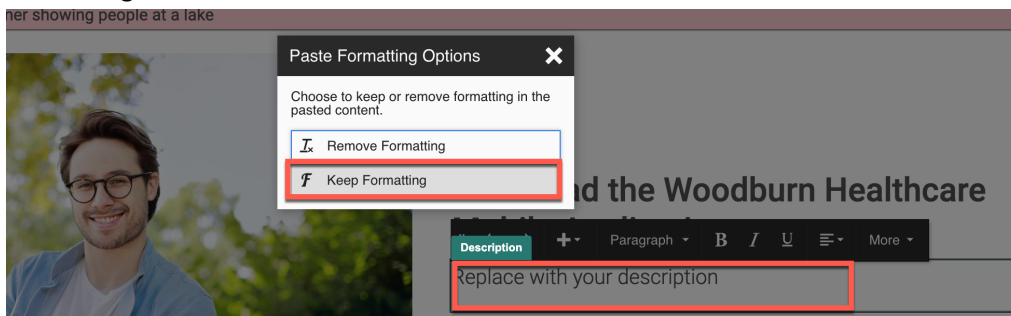


16. Then select and copy the description from the MS Word document.

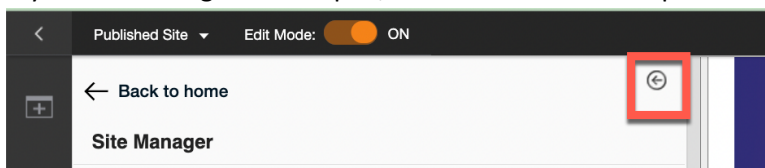
Download the Woodburn Healthcare Mobile Application



17. And select the current content and paste it over in the description field. Choose to keep the formatting.

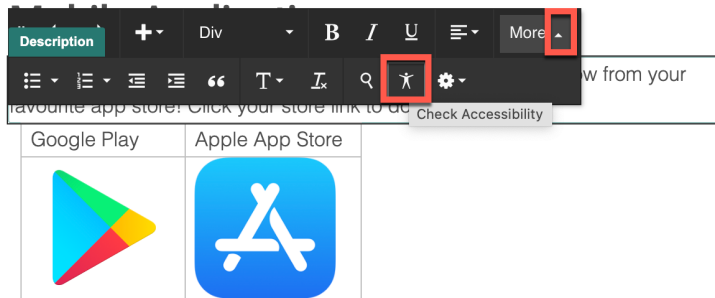


18. If you Site Manager is still open, close it to have more space to edit.

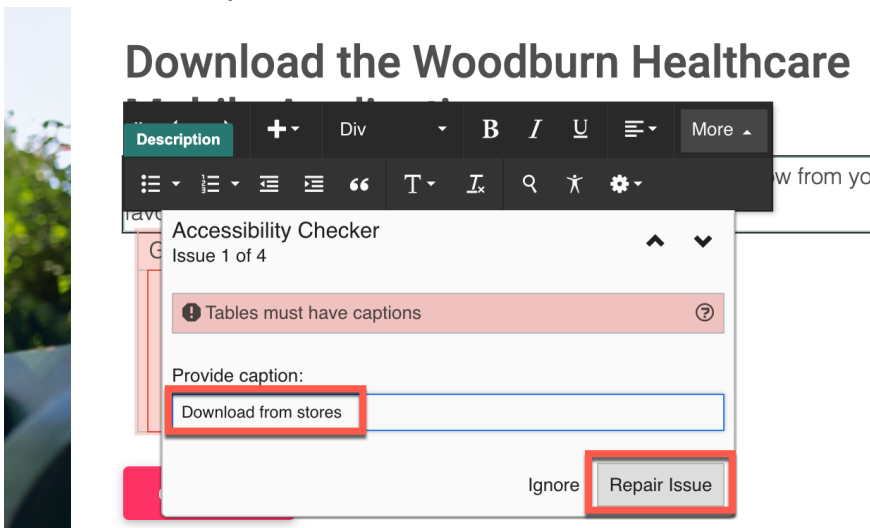


- Then check if this content is accessible, so the site may be used by visually impaired people as well. Click the **More** in the menu and then the **Check Accessibility** icon.

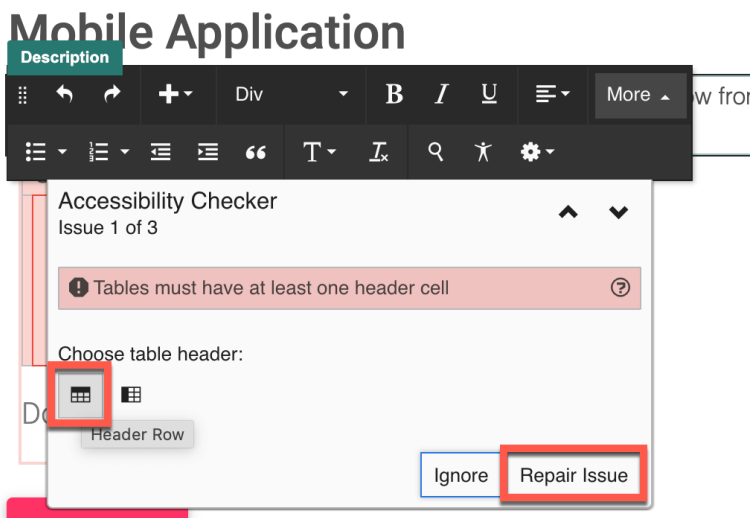
Download the Woodburn Healthcare



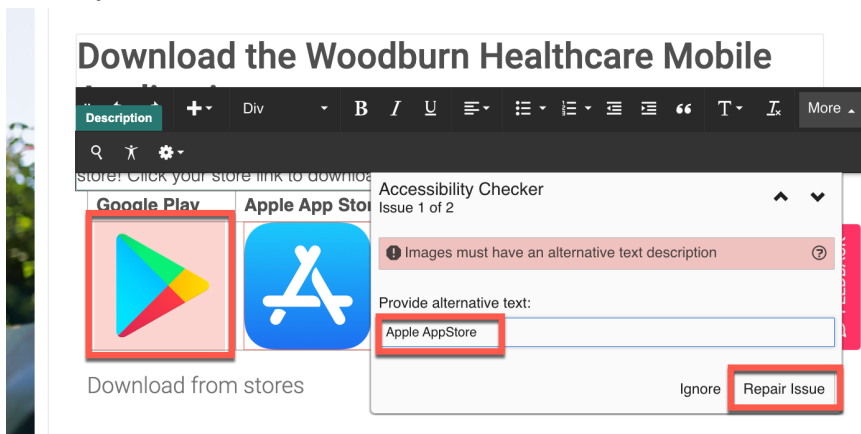
- Notice four issues and start providing a good caption for the table, e.g. **Download from stores** and click **Repair Issue**.



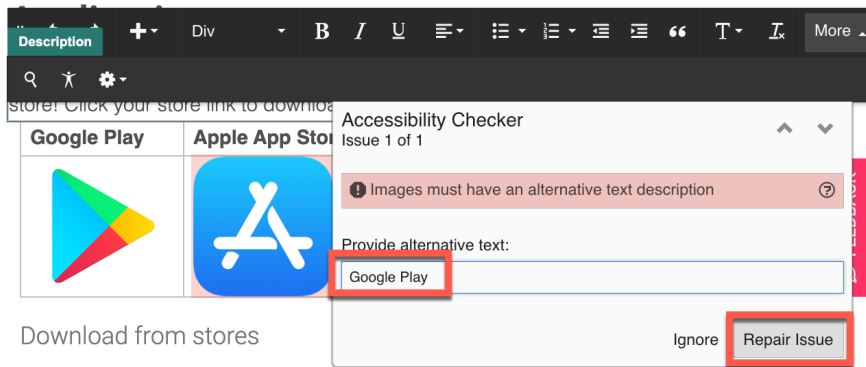
- Then choose the **Header Row** to be the table header and click **Repair Issue**.



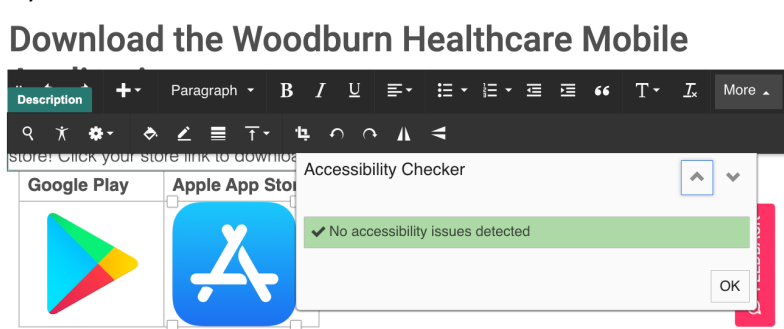
- 22. Add provide alternative texts for the two app store images, **Apple AppStore** for the first and click **Repair Issue**.



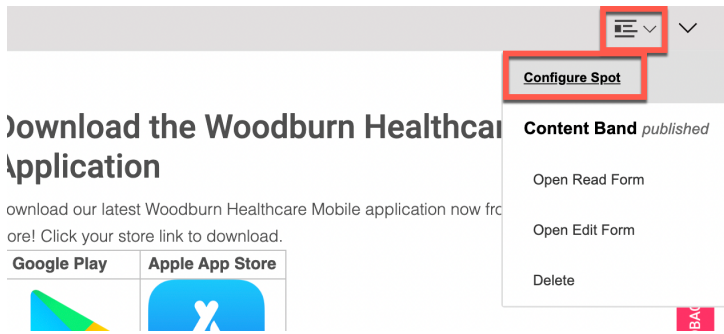
- 23. And **Google Play** for the Google Play image and click **Repair Issue**.



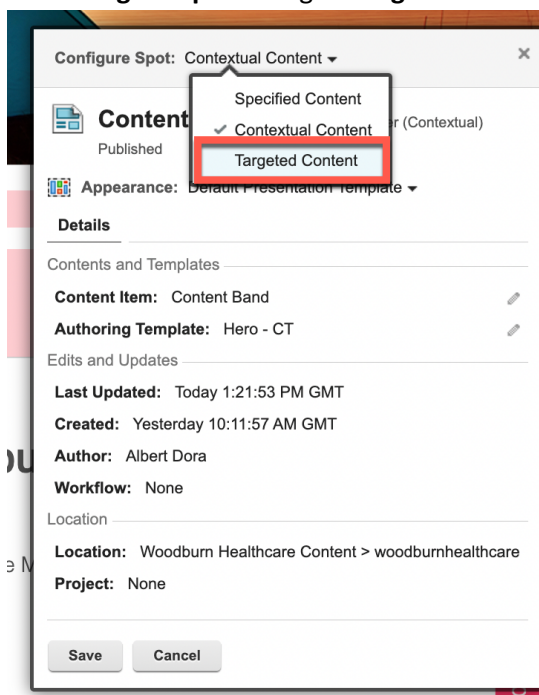
- 24. And you see it is accessible now.



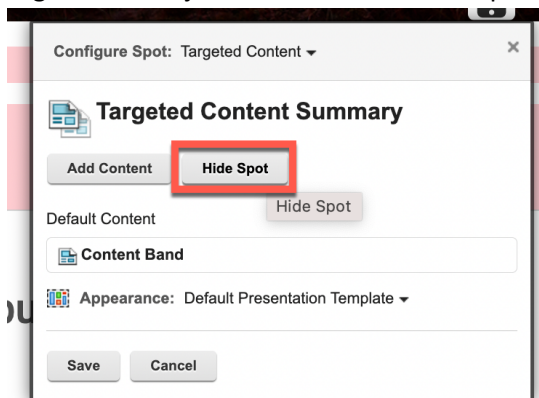
25. Now ensure if it only going to be visible for mobile visitors. Open the display content menu and click **Configure Spot**.



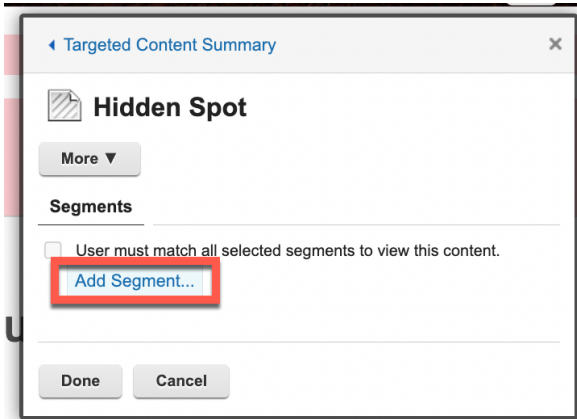
26. Check out all details on this new content and then make it targeted content instead. Change the **Configure Spot** config to **Targeted Content**.



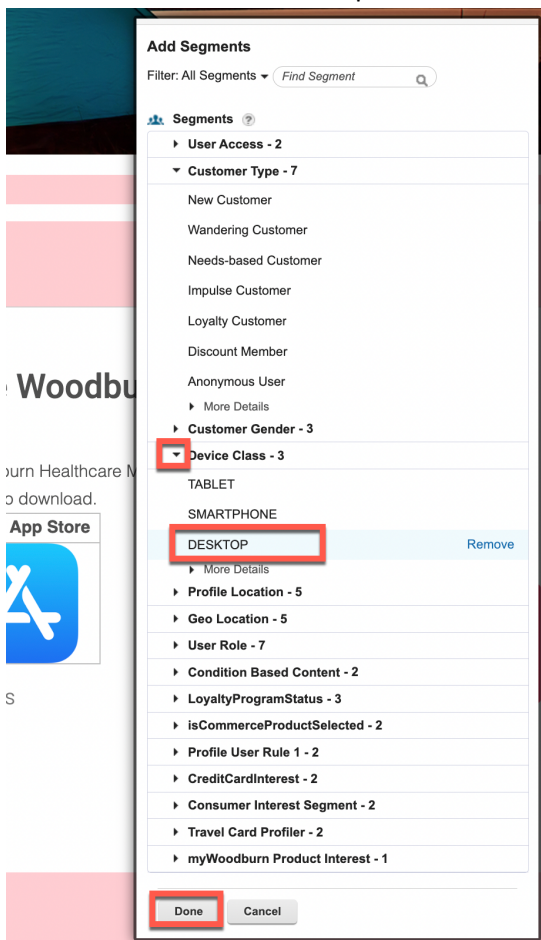
27. Notices you can add other contents (that may be applications) and target each to a specific segment. Now just hide this from desktop users. Click **Hide Spot**.



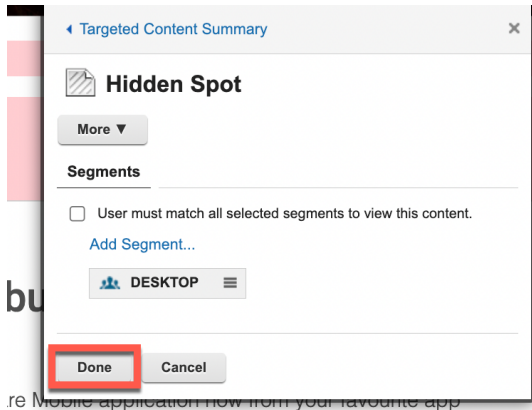
28. And select the right segment to hide. Click **Add Segment...**



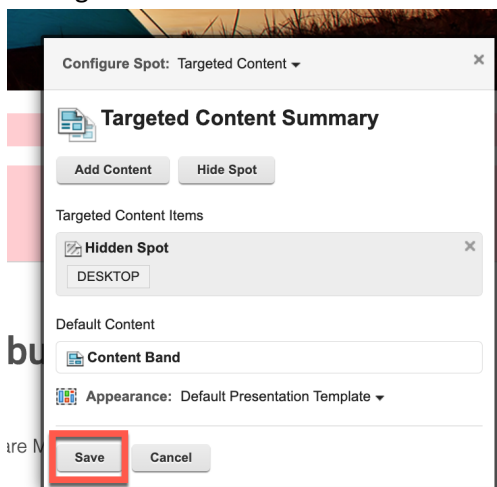
29. Then notice many ready to use segments you can use to target this content. For example, geolocation based, customer types, user roles, etc. Hide it for the desktop devices, so it only is visible to mobile devices. Open **Device Class**, select **DESKTOP** and click **Done**.



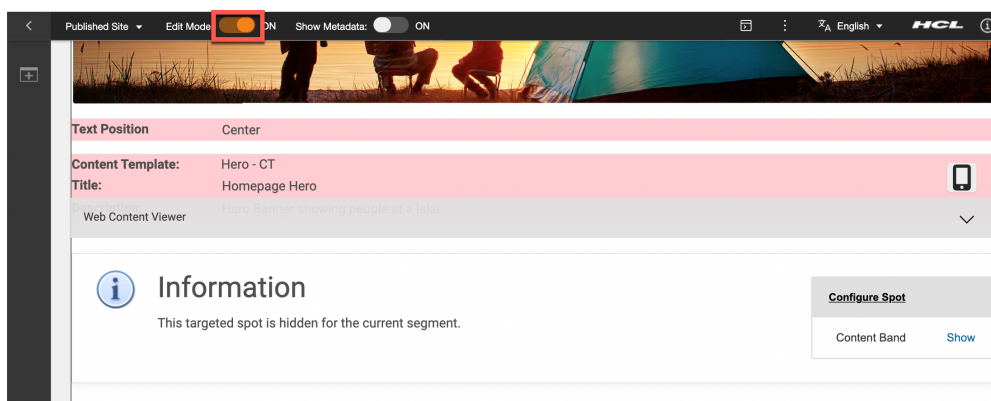
30. Check your configuration and validate. Click **Done**.



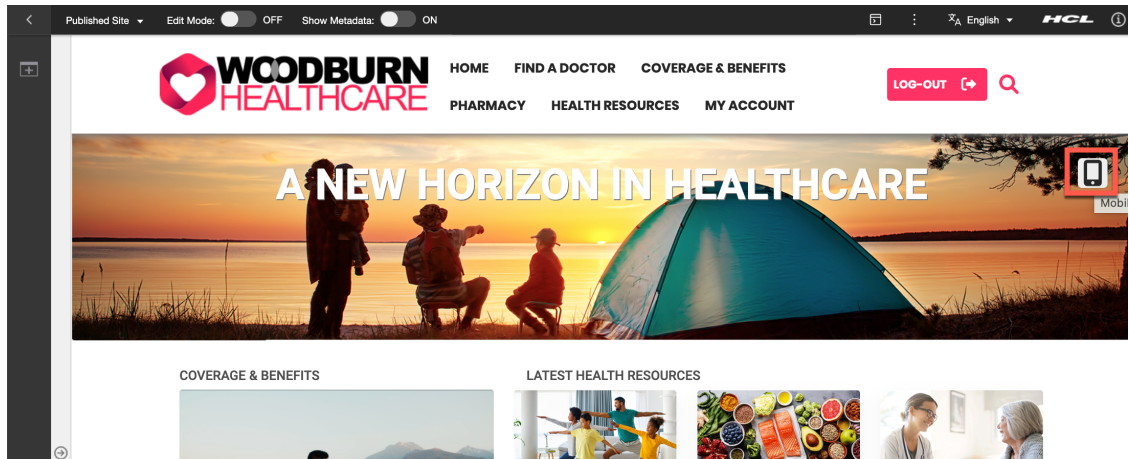
31. And again. Click **Save**.



32. As you are editing with a desktop device now, it is now hidden for you. You are still able to make it show and edit, by clicking on it. Now check how it looks on the published site. Switch off the edit mode.



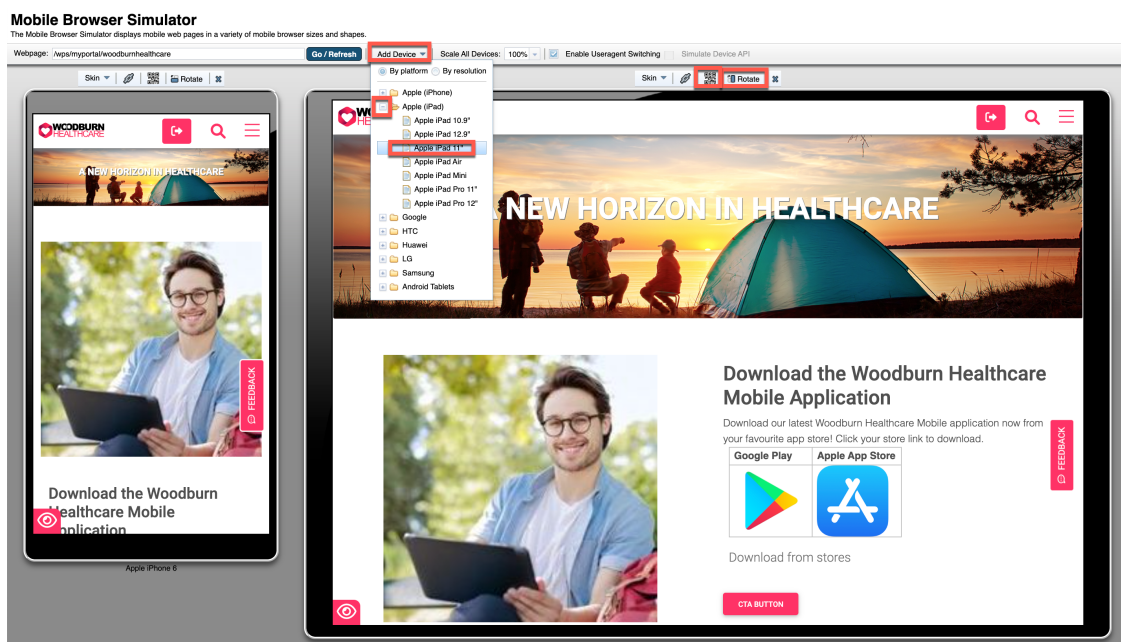
33. And then test if it works correctly on other devices. Click the **Mobile Preview** icon.



34. Ensure the **Enable Useragent Switching** is enabled and you are using a Chrome compatible browser.



35. You then see it works nicely on an iPhone. Then try it with a tablet as well. Click **Add Device**, open **Apple iPad** and select **Apple iPad Air**. You may rotate it and even use the QR code to test it also with your own device.



You have successfully added an advertising for a mobile application using an MS Word document that is accessible and only visible for mobile devices and ensured it all work correctly.

Conclusion

Using this lab tutorial, you explored some more advanced functionality of the Site Manager. You learned how to reorganize pages and page components, manage the page description, add page components using an MS Word document you made accessible to publish on your site, target it to mobile devices only and ensure it worked well for all devices.

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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