HCL Digital Experience

HDX-BU-200
Web Content Workflow Lab

HCLSoftware U

Creating a new generation of experts

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Bio

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Introduction

This hands-on lab gets you started on the HCL Digital Experience (DX) platform and its workflow capabilities. You will see how workflow ensures that only approved content appears on your website. You will also learn to use the Content Reporting tool to easily search and modify several items together.

In this DX back-office user lab, you will act in the role of Rose, Ethan, and Albert, who are going to team up to prepare several changes to the website of the fictitious Woodburn Healthcare company.

Rose Bozli, Marketing Rep, based in Tokyo (Japan)

Rose, a Marketing Rep, will create a new product and submit it for approval. After approval, Rose will then update the content again and create a new version.

Ethan Adams, Chief Content Editor in San Francisco (USA)

Ethan is a content reviewer and will use the Web Content Home page to find, approve and publish the content created by Rose.

Albert Dora, Marketing Manager in San Francisco (USA)

Albert is a site manager, who will use the Content Reporting to extend the expiration date for some content items.

Prerequisites

1. Completion of HDX-INTRO and HDX-BU-100 courses, including the labs
2. A DX server with DX Solution Modules https://hclsofy.com/catalog/dx-solution-modules deployed of HCL SoFy, as this gives you access to the Woodburn Bank site and workflow.
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 (Marketing Rep Rose Bozli)	sbotello	HCL-Dem0
DX Login (Content Chief Editor Ethan Adams)	eadams	HCL-Dem0
DX Login (Marketing Manager Albert Dora)	Adora	HCL-Dem0

Lab Overview

In this lab, you will learn to use web content workflow and to make bulk updates to content. You will discover has a four stage workflow with stages draft, review, publish and expire is used by different personas. There are different parts to use this workflow and to bulk update content, shortly introduced now.

Part 1: Rose creates a new product and submits for approval

As Rose, you need to add a Withings BPM Connect Blood Monitor product to the Health Resources. You will set an expiry date and then submit the article for approval. You will also see how this shows in the Content Composer.

Part 2: Ethan Reviews the Product and Approves it

As Ethan, you've been notified that Rose has created a new product and would like you to review and approve. You will use the Web Content Home page to search for, preview, and approve Rose's content.

Web Content Activity

Show: All   My Favorites   My Recent Items   My Drafts   **My Pending Approvals**

Open selected view in the Library Explorer

Withings BPM Connect Blood Monitor
Moved by user Rose Bozli - From stage Draft to Review | Woodburn Healthcare Content / woodburnhealthcare / healthresources / products | Today 9:13:
Status is Draft | Open | Approve Reject | Preview

Part 3: Rose creates a new version of the content previously created

Rose now wants to update the Withings BPM Connect Blood Monitor product, to better indicate it is a new product. She will create a new draft that she updates and submits for approval again.

Open Read Form

Libraries > Woodburn Healthcare Content > Content > woodburnhealthcare > healthresources > products > Withings BPM Connect Blood Monitor

Withings BPM Connect Blood Monitor ☆
Status - Published | Last modified Today 10:27:40 AM GMT by Rose Bozli | Created by Rose Bozli

Preview   Link   Create Draft   Versions   View References   Close

Content   Properties   **Comments (1)**

Ethan Adams approved on 12/22/23, 11:27 AM
Good product. All correct.

Part 4: Albert uses Content Reporting to extend the expiration date

When Rose created the Withings BPM Connect Blood Monitor product, she set the expiration date to a year from now. Albert needs to update this to two years from now.

Reporting 1 results found   Updates   **Update**   **Export**

Search Criteria   Expiry date: From 12/22/2023, To 12/31/2024;   **View Criteria**

Title ↑	Name	Loc...	Status	Type	Expi...	Las...	Own...	A...
W...	Withings...	Wo...	P	Conte		UTC	cn...	cn...

✓ 1 item updated successfully   **View item**   ✕

Show rows: 50 ▾   1-1 of 1

Part 1: Rose Creates a new Product and Submits for Approval

As Rose, you need to add a Withings BPM Connect Blood Monitor product to the Health Resources. You will set an expiry date and then submit the article for approval. You will also see how this shows in the Content Composer.

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**. Simulator, to access your instance of the DX Solution Modules.

2. Then click **LOG-IN**, enter **User ID rbozli** and **Password HCL-Dem0** and click **LOG-IN**.

3. Navigate to the **HEALTH RESOURCES** page. Here you see the current HIGHLIGHTED PRODUCTS. Now add your Withings BPM Connect blood monitor. Enable the **Edit Mode**.
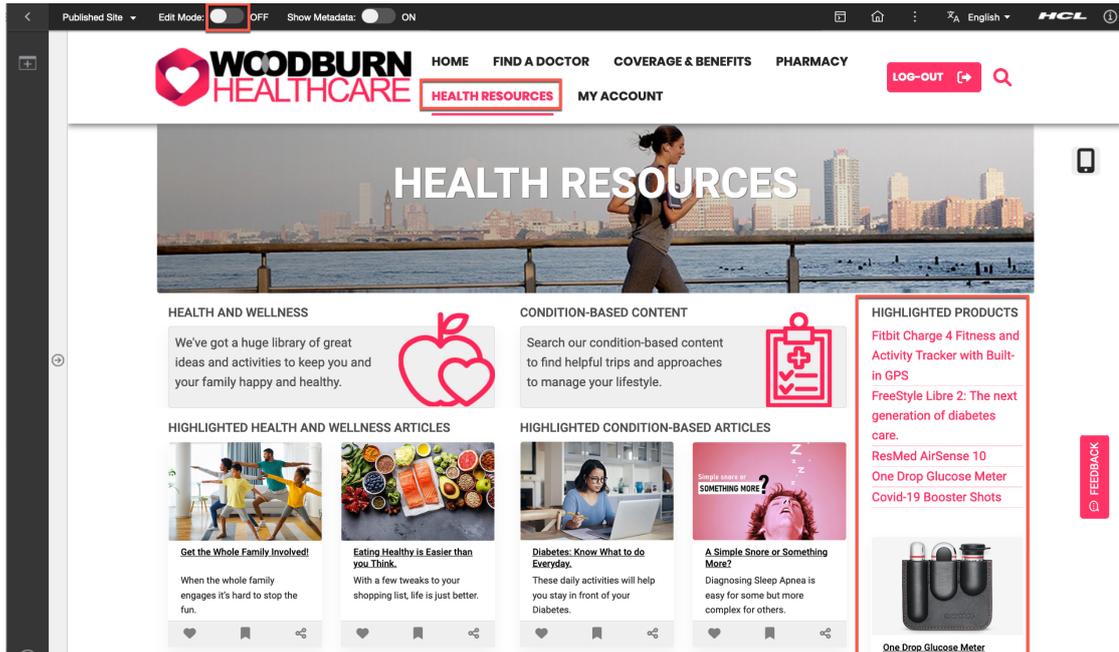
4. You now have an option to create a new product. Click **Create Product**.
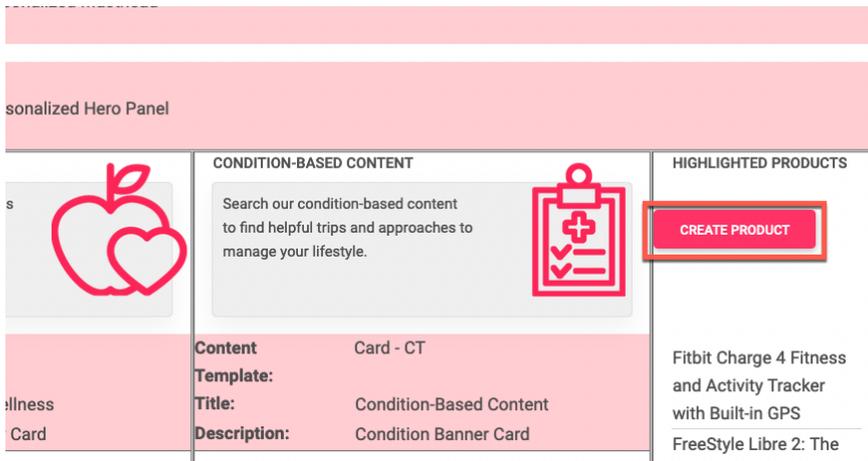
5. And enter the name of your new product **Withings BPM Connect Blood Monitor**. Then click **Create.**
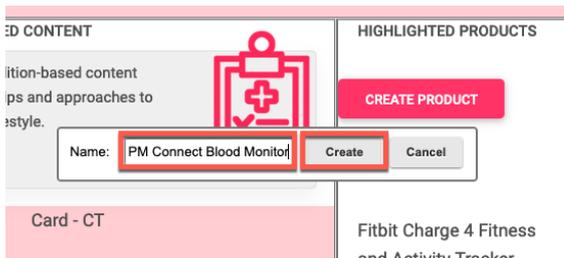
6. You should see the detail page for your new product. Then, use the lab resources **Withings BPM Connect.docx** to set the **title (Title)**, **description (Description)**, **by (Manufacturer)**, **item # (Item Number)**, **price** and **Cost to you (Member Price)** for his product and update the **Primary Image** with the lab resource **Withings BPM Connect.jpg**, or use one of your own. Notice also the specific workflow related information in the meta-data. It shows it uses the Four stage workflow and is currently in draft. You may specify when you would to publish and expire the item. Leave the publish date and set the expire date to a year from now. It should look like below. Then submit your article for review so Ethan can review and approve.
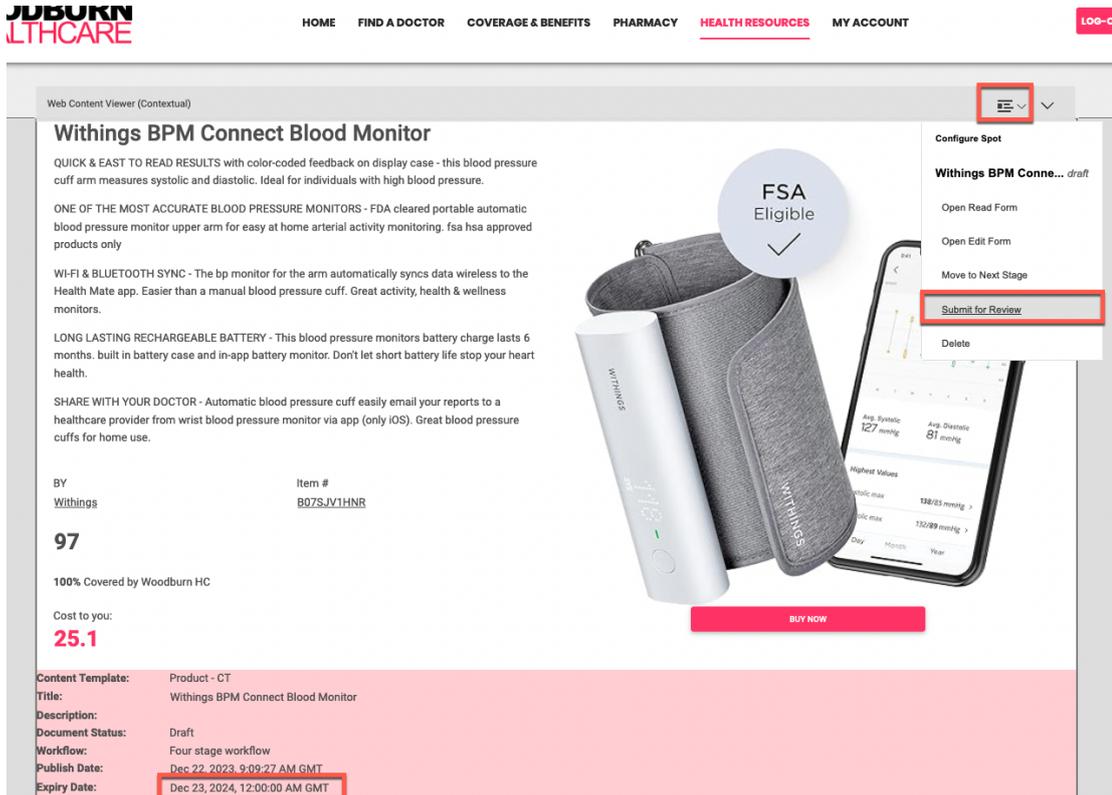
7. Ignore what the page shows, as your content is in draft and you are working on the published site. If you were using a Project, your content would continue to show properly in draft. You'll learn more on this in the Project lesson. Also, you would typically use an e-mail action to inform your approvers on your new content, that would be part of the workflow. This is not set up here, as there is no mail server running on HCL SoFy. Now check how this looks like in the Content Composer. Open the site menu and select the **Practitioner Studio**.
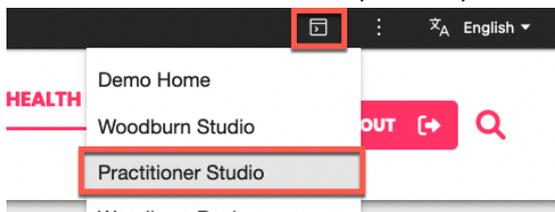
8. And go to Web Content. Click any of the **Web Content** options.
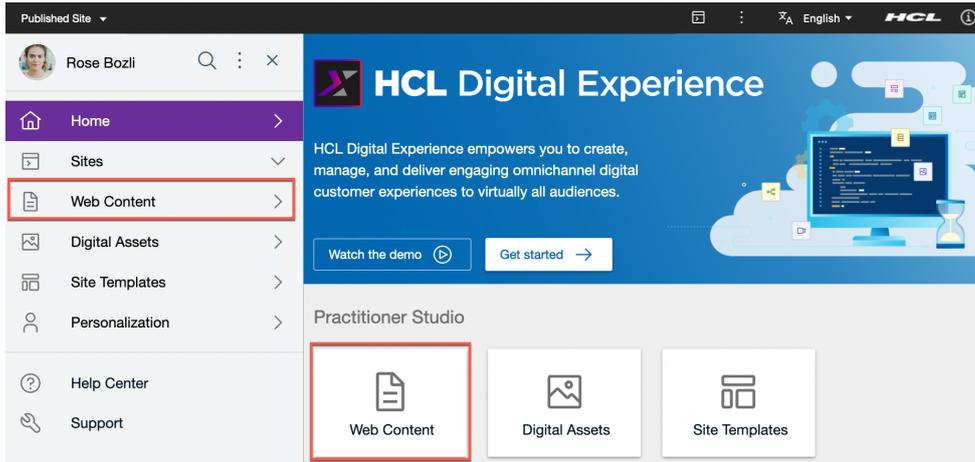
9. Then select the **Woodburn Healthcare Content** library - **Content – woodburnhealthcare – healthresources – products – Withings BPM Connect Blood Monitor.** Notice its icon which is orange, meaning in draft.

10. You can now only view it. Notice it is still in draft. If you had it saved, instead of submitting for a review, you would be able to make updates here. Now view it. Click **View**.
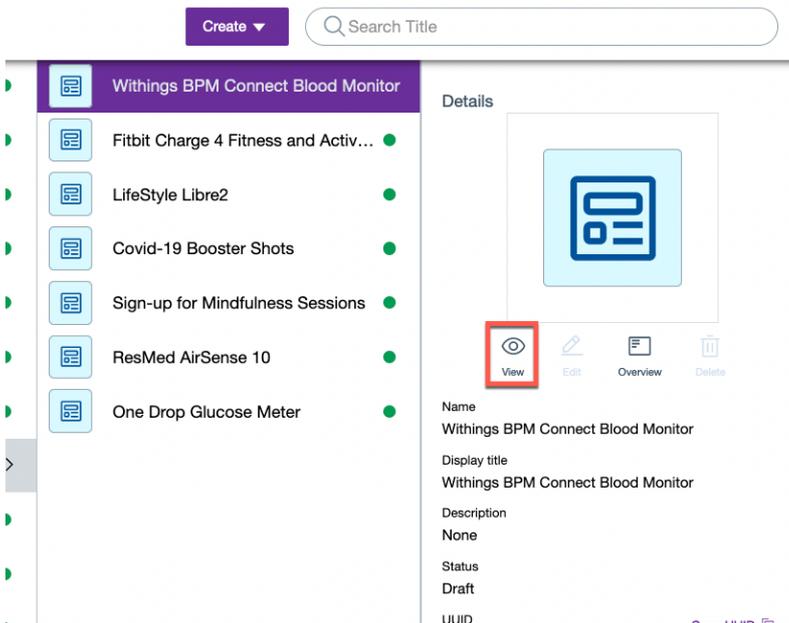
11. Notice it is currently in the Review workflow stage, waiting for Ethan to approve. Log out as Rose.
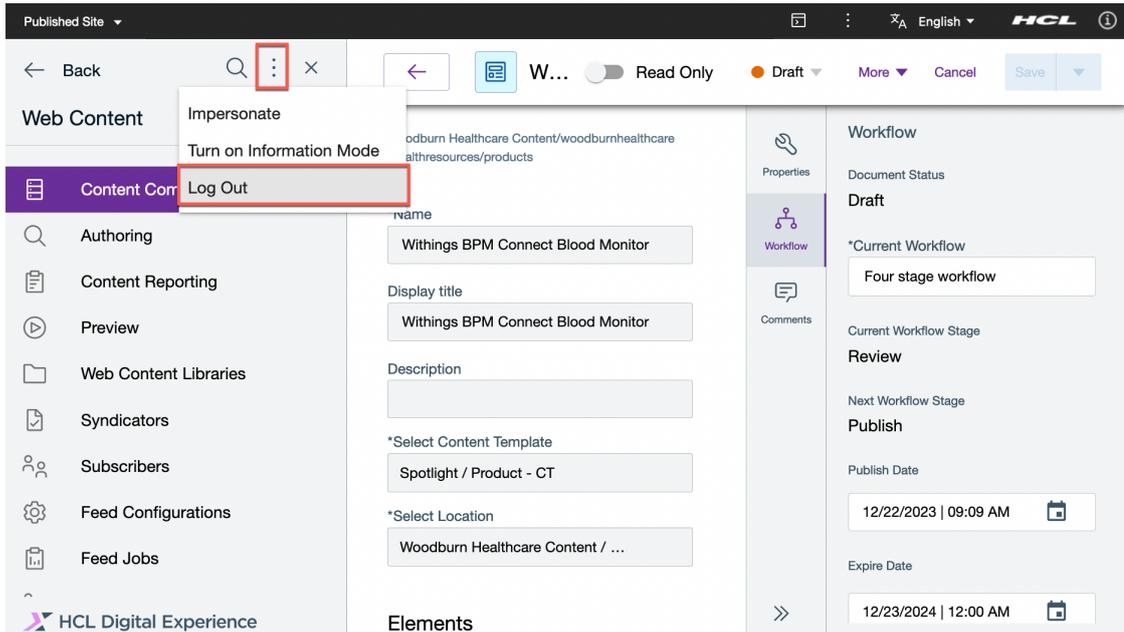
Congratulations! You've created a new draft content product called Withings BPM Connect Blood Monitor using the Site Manager and have submitted it for review.

Part 2: Ethan Reviews the Product and Approves it

As Ethan, you've been notified that Rose has created a new product and would like you to review and approve. You will use the Web Content Home page to search for, preview, and approve Rose's content.

1. Now log in as Ethan, a member of the content approvers team, to review and approve Rose's content. Click **LOG-IN**, enter **User ID eadams** and **Password HCL-Dem0** and click **LOG-IN**.
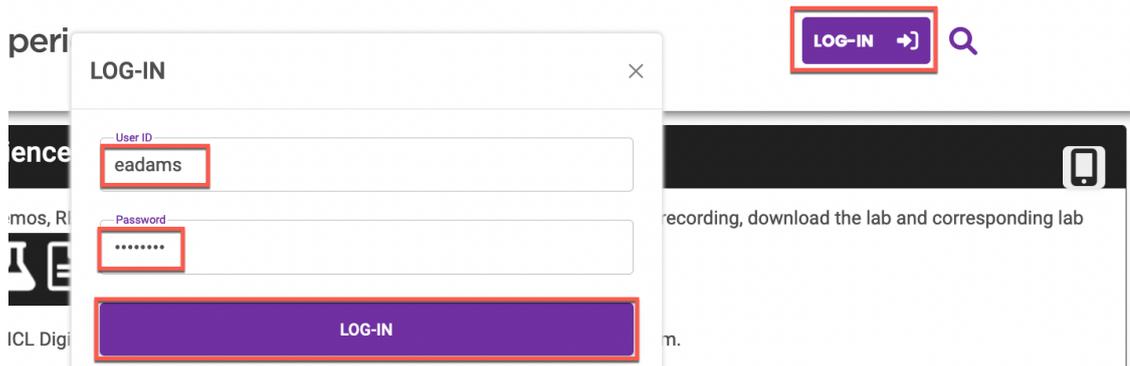
2. First check it out in the Content Composer. Open the site menu and click the **Practitioner Studio**.
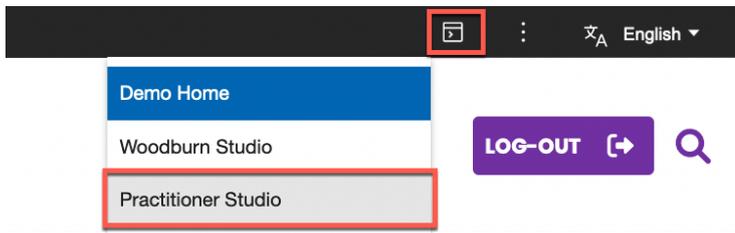
3. And open Web Content. Click **Web Content**.
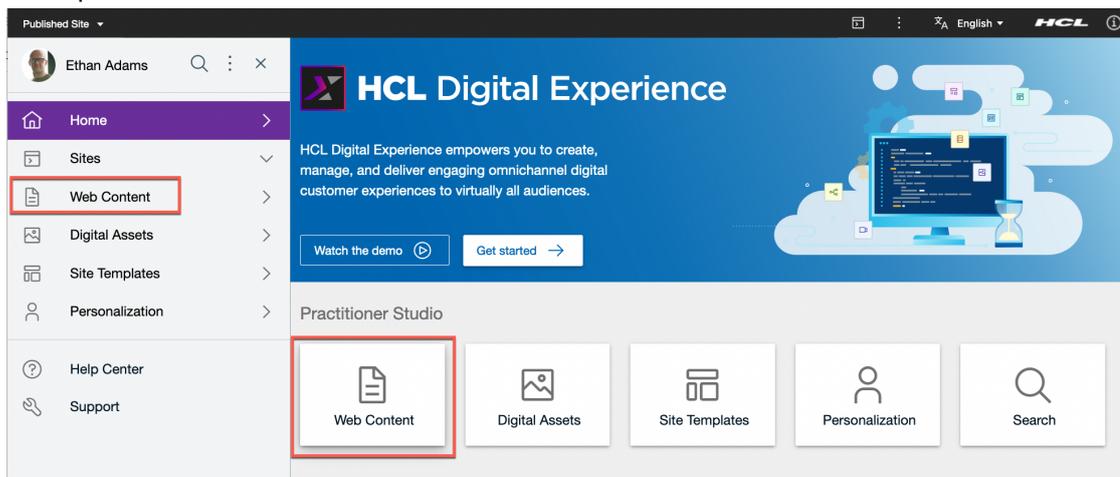
4. You may still use the Content Composer to view and approve the content. Select the **Woodburn Healthcare Content** library, **Content**, **woodburnhealth**, **healthresources**, **products**, **Whithings BPM Connect Blood Monitor** and **View**.
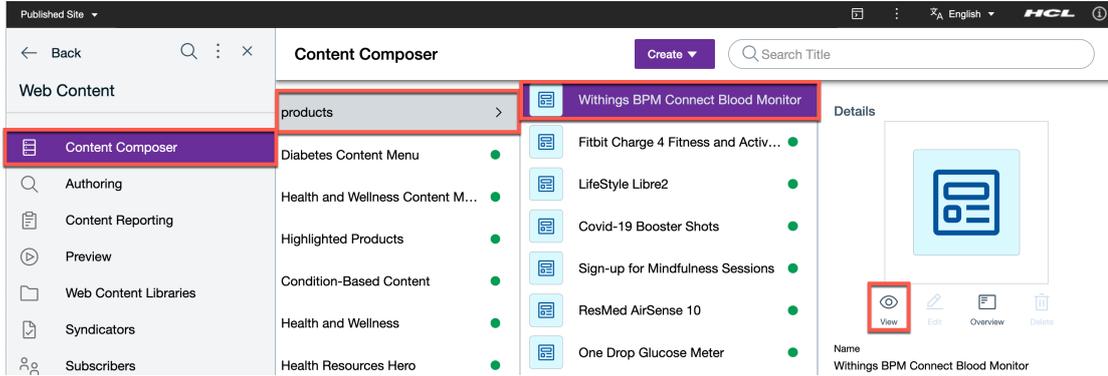
5. You can view the content and have the options to reject or accept/publish.
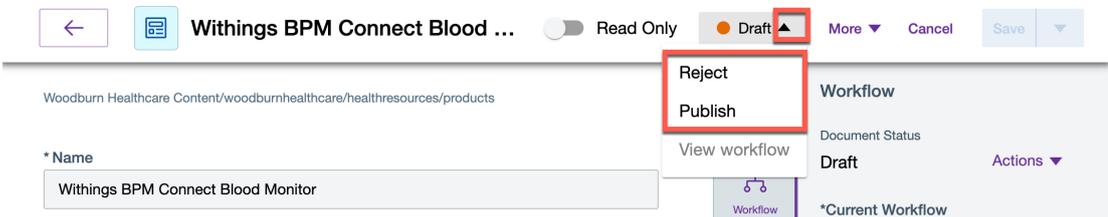
6. However, instead use the Web Content Authoring. This allows an easier view of the all items that may need your approval.
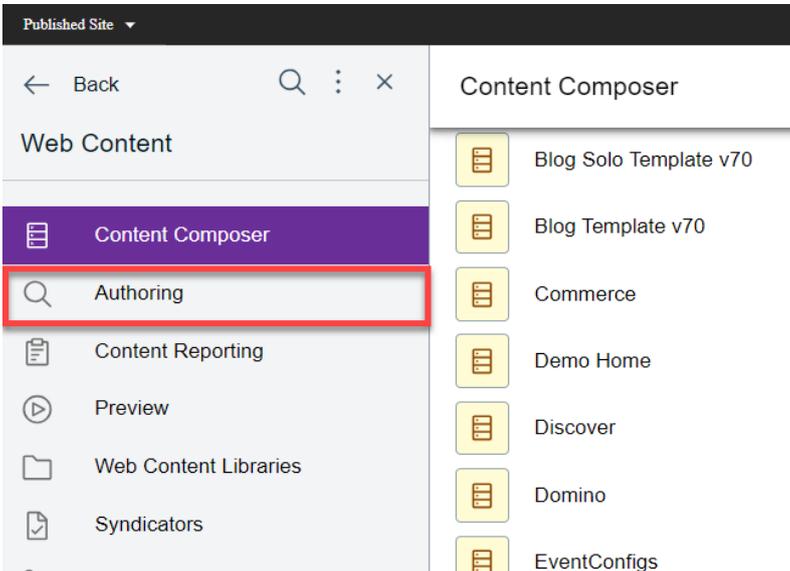
7. This gives you access to your Web Content Home Page. This helps you simplifying managing content in the back office. Notice the new **Withings BPM Connect Blood Monitor** content under the **Web Content Activity**. You have dedicated views to see all your favorites, recent items, drafts and pending approvals. Have a look at all content you need to approve. Click **My Pending Approvals**.

8. There are options to Open, Approve, Reject, and Preview. Have a look first on how this content previews. Click **Preview**.

9. Ensure you allow pop-ups, as the preview will open in a new window. Check if it is good to approve.

10. Then go back to the previous window, close this new one, and approve it. Click **Approve**.


11. This workflow is configured to require a comment. Enter for example Good product. All correct. And click **OK**.

12. You have no other pending approvals. Now check if the product is correctly published. Open the Woodburn Healthcare site.

13. And go to the Health Resources page where you see the new product. You may look at it in details. Then log out. Click **LOG-OUT**.
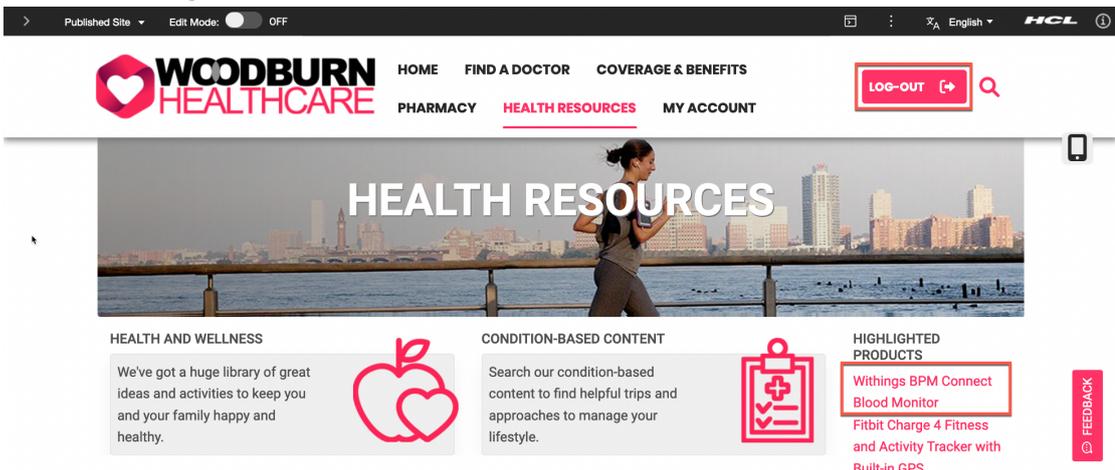

Congratulations! You have successfully reviewed and approved Rose's content using the **Web Content Home Page** interface.

Part 3: Rose Updates the Product

Rose now wants to update the Withings BPM Connect Blood Monitor product, to better indicate it is a new product. She will create a new draft that she updates and submits for approval again.

1. Login a Rose. Click **LOG-IN**, enter **User ID rbozli** and **Password HCL-Dem0** and click **LOG-IN**.
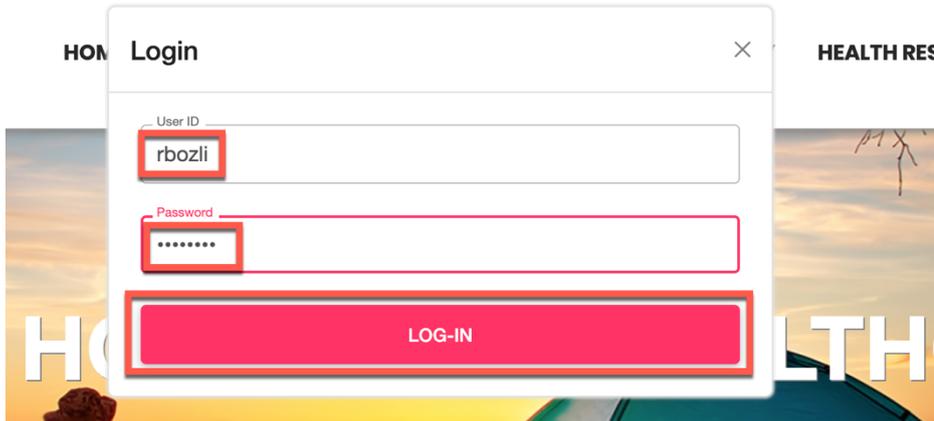
2. Then navigate to the **HEALTH RESOURCES** page and select the **Withings BPM Connect Blood Monitor** product.
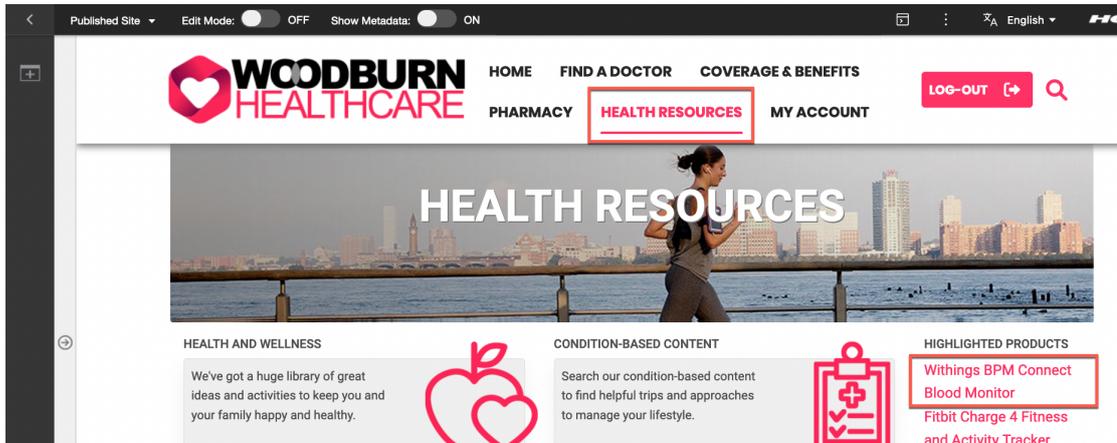
3. Then enable the **Edit Mode**. Notice that you typically would work with a project. In that case Rose would simply use make the changes directly in the page and this would automatically create a draft. As you are now working on a published site, you need to use form. Open the **Content Menu** and click **Open Read Form**.
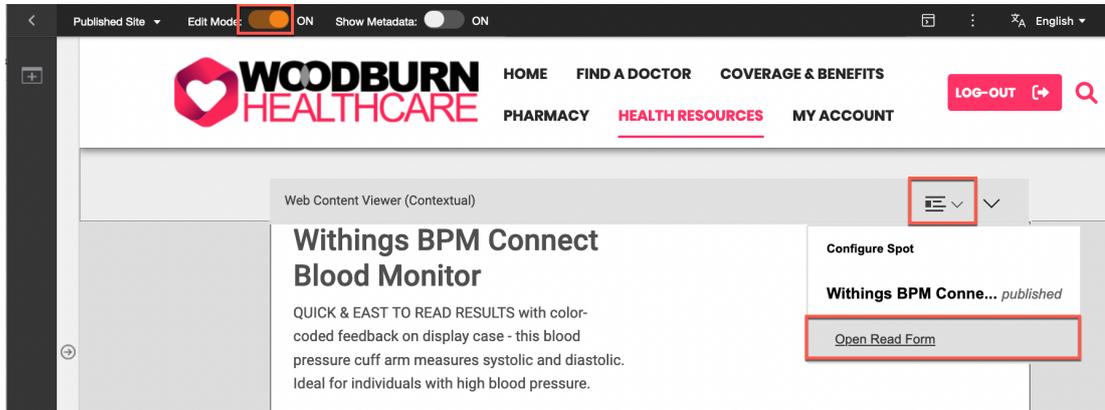
4. First have a look at the comment that Ethan, the approver added. Click **Comments**.
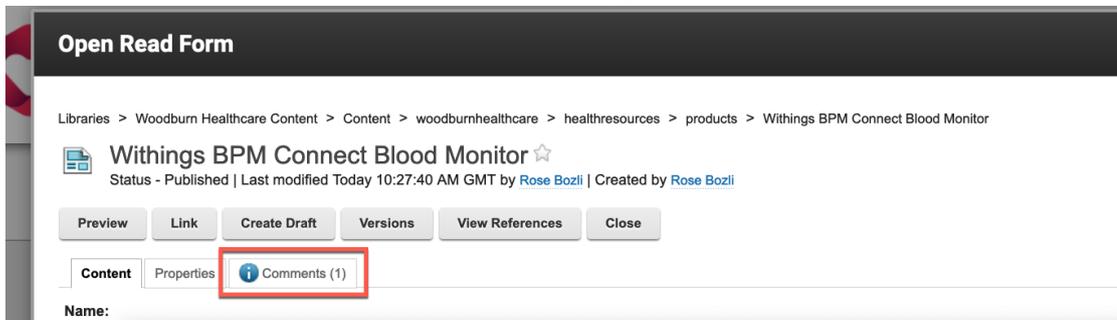
5. You cannot make changes to this published version. Therefore, you first need to create a new draft. Click **Create Draft.**
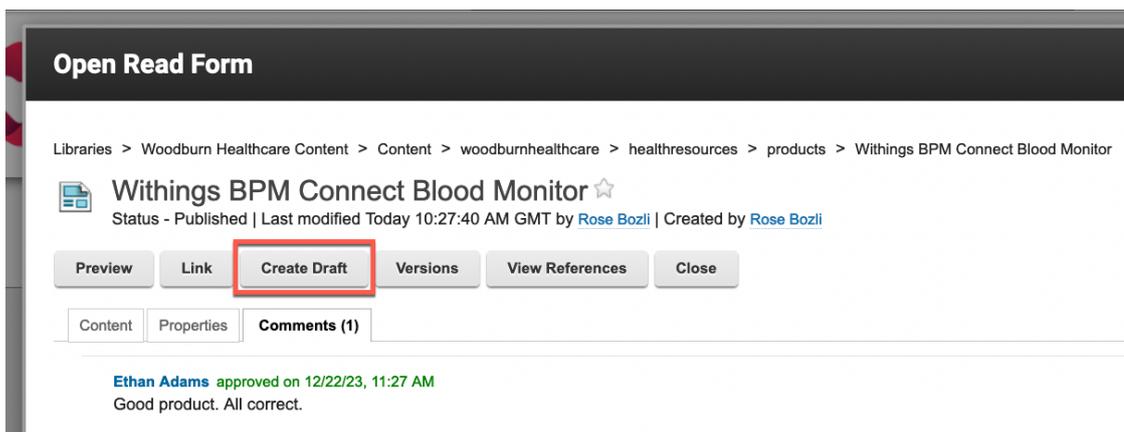
6. Now you can edit the new draft. Click **Edit**
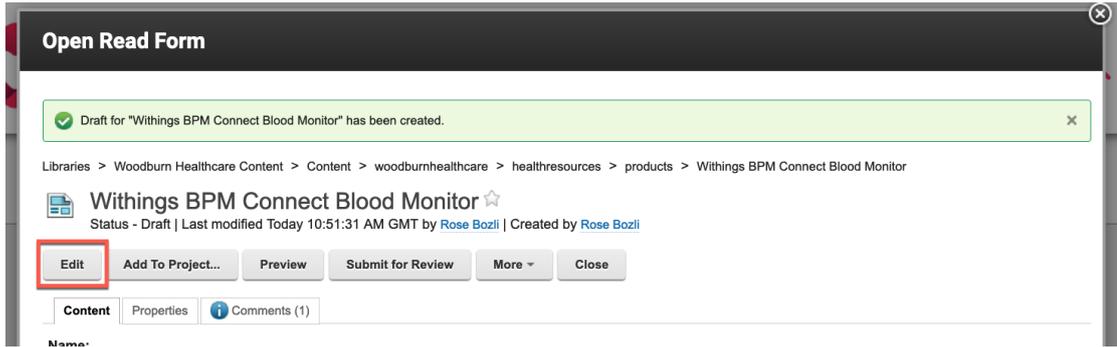
7. Then update the title and add **– New** and submit it for review again. Click **Save and Submit for Review**.
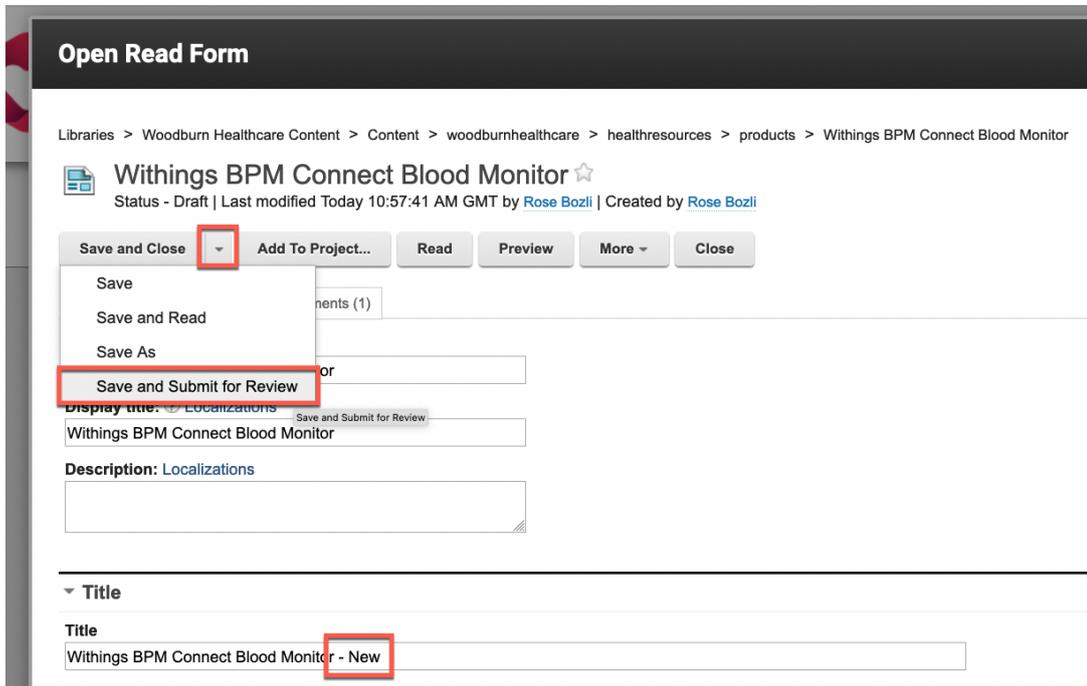
8. And close it. Click **Close**.
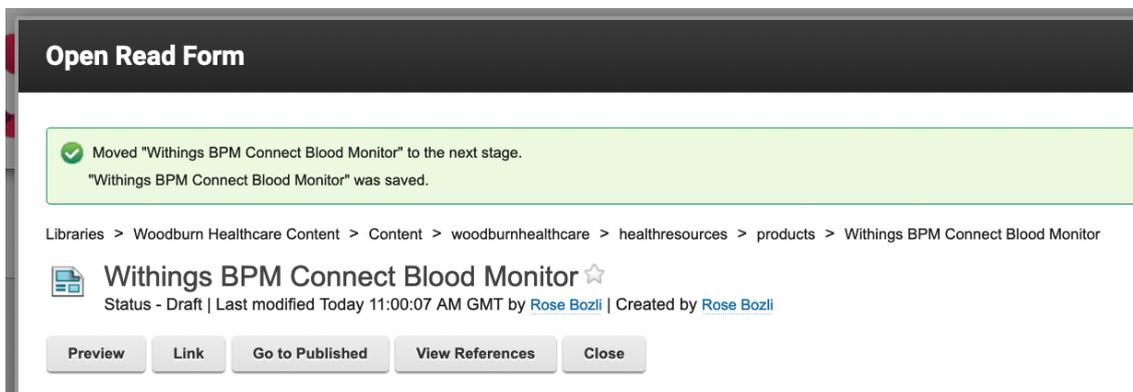
9. Notice that you still the currently published version of your product. Now log out as Rose.
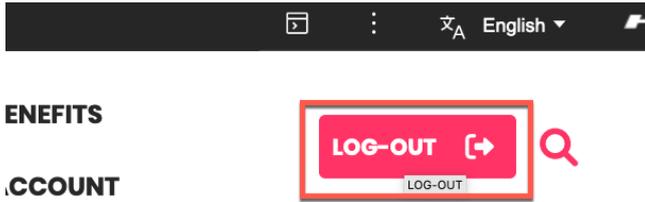
10. Then repeat part 2 with Ethan to approve this new version. It should show with the updated title.
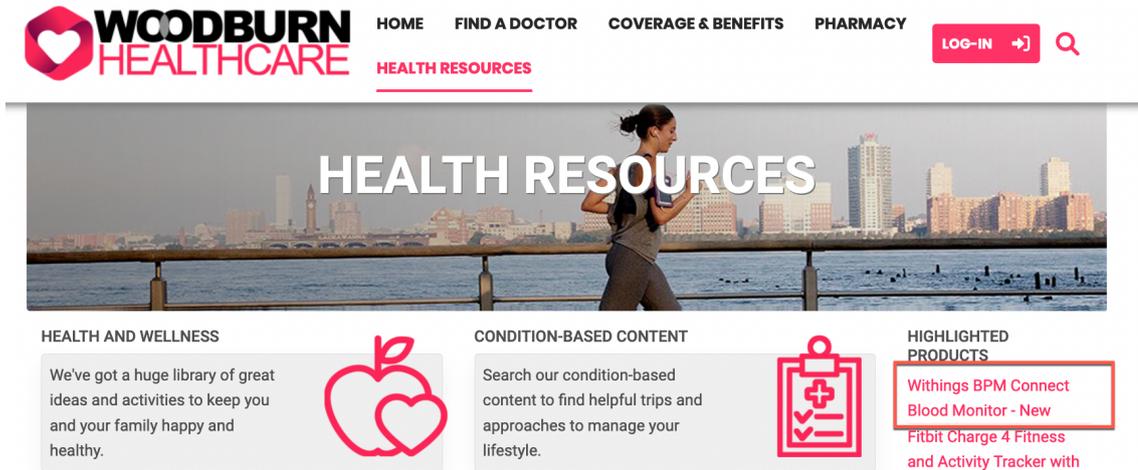
Congratulations, you have successfully created a new version of the **Wealth Management** article and submitted it for review, all while keeping the original text in place until the updated article gets approved.

Part 4: Albert uses Content Reporting to Extend the Expiration Date

When Rose created the Withings BPM Connect Blood Monitor product, she set the expiration date to a year from now. Albert needs to update this to two years from now.

1. Now log in as Albert, a marketing manager with a site manager role and go to the Content Reporting. Click **LOG-IN**, enter **User ID adora** and **Password HCL-Dem0** and click **LOG-IN**.
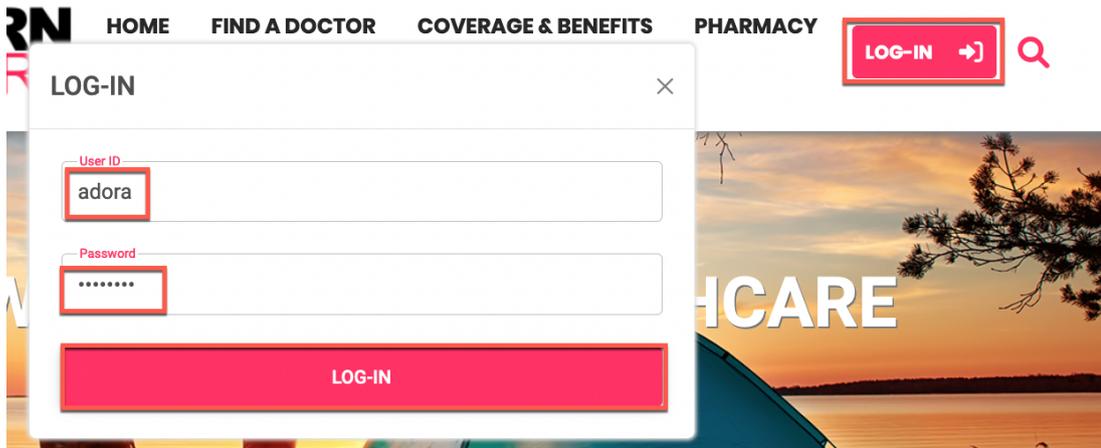
2. Open the site menu and click **Practitioner Studio**.
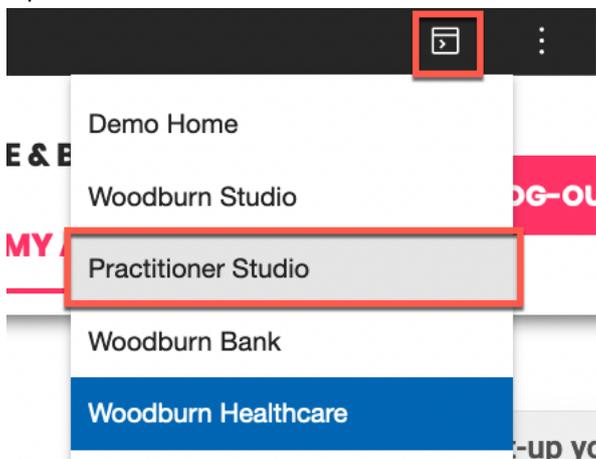
3. Then go to web content. Click **Web Content**.
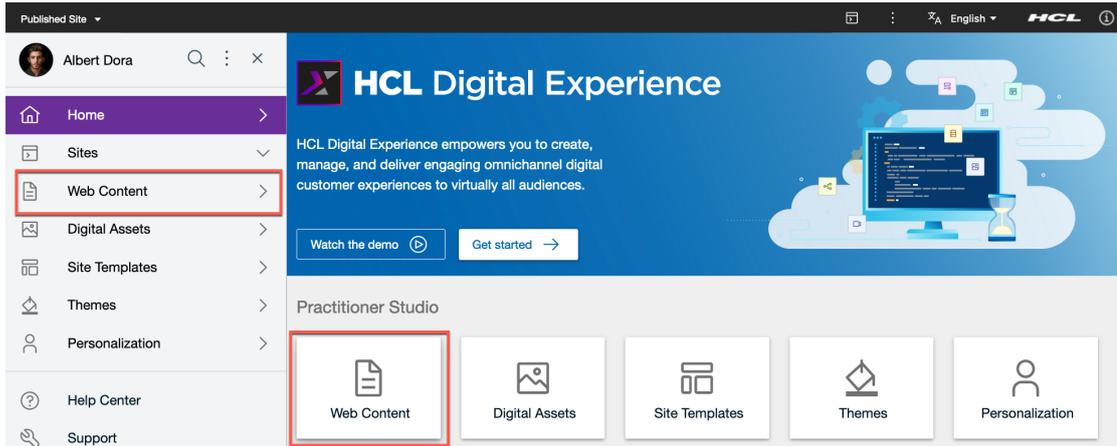
4. And go to Content Reporting. Click **Content Reporting.**
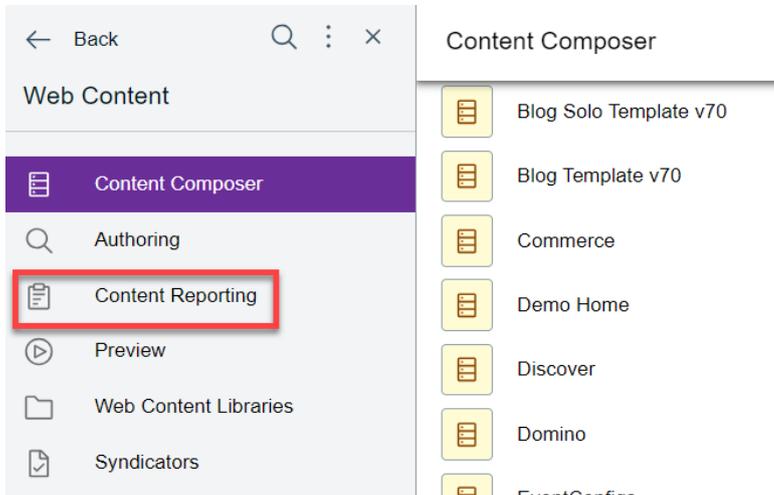
5. Now select all contents that are planned to expire in the next year. Under **Criteria**, select **Expiry Date** and select a date range from today to a bit more than a year from today. In your environment, you may need to search for a date further in the future. Click **Search**.
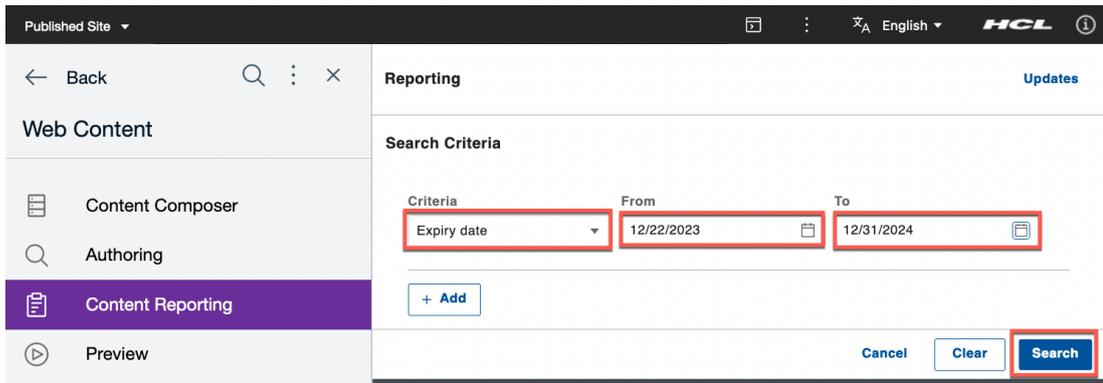
6. You see the product that was created by Rose and approved by Ethan. Click **Update**.

7. Then update the expiry date to two years from today. Set the **Change to** date to two years from now and click **Update**.

8. Click **Update** on the confirmation screen.

9. A progress bar is displayed at the bottom of the screen.

10. Then you see it is updated successfully. Have a look at the item to verify. Click **View item**.

11. And click the edit icon.

12. This shows you that the expiry date has successfully been updated to two years from now. You may also confirm the changes by re-running the search in the Content Reporting.

Libraries > Woodburn Healthcare Content > Content > woodburnhealthcare > healthresources > products > Withings BPM Connect Blood Monitor

Withings BPM Connect Blood Monitor ☆
Status - Published | Last modified Today 11:55:44 AM GMT by Albert Dora | Created by Rose Bozli

Save and Close	▼	Read	Preview	Apply Authoring Template	More ▾	Close

Content | **Properties** | ⓘ Comments (2)

Type:
Content

Location:
Woodburn Healthcare Content / woodburnhealthcare / healthresources / products / Withings BPM Connect Blood Monitor

Authors: Add Authors ▾
Rose Bozli ✕

Owners: Add Owners ▾
Rose Bozli ✕

▸ ⛁ **Content Properties**

▸ ▤ **Profile**

▾ ⚙ **Workflow**

Document Status:
Published

*Current Workflow: Select Workflow ▾
Spotlight / Four stage workflow

Current Workflow Stage:
Spotlight / Publish

Next Workflow Stage:
Spotlight / Expire

Joint approval
None

Publish Date:
| 12/22/2023 | ▾ | 09:09:27 AM | ▾ | Clear |

Expiry Date:
| 12/31/2025 | ▾ | 12:00:00 AM | ▾ | Clear |

Congratulations! You were able to easily check and update the expiration date to two years from today by using Content Reporting.

Conclusion

Using this lab tutorial, you learned how easy it is to create content and submit it for review. You then saw how approvers can quickly find the content they need to review, review it and approve or reject the content. You learned how you may start preparing updates with new drafts that are submitted and approved as well, while the current content stays published. And you learned how site managers may easily search and updated contents using the Content Reporting.

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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