

Lab Get your hands on IBM Digital Experience

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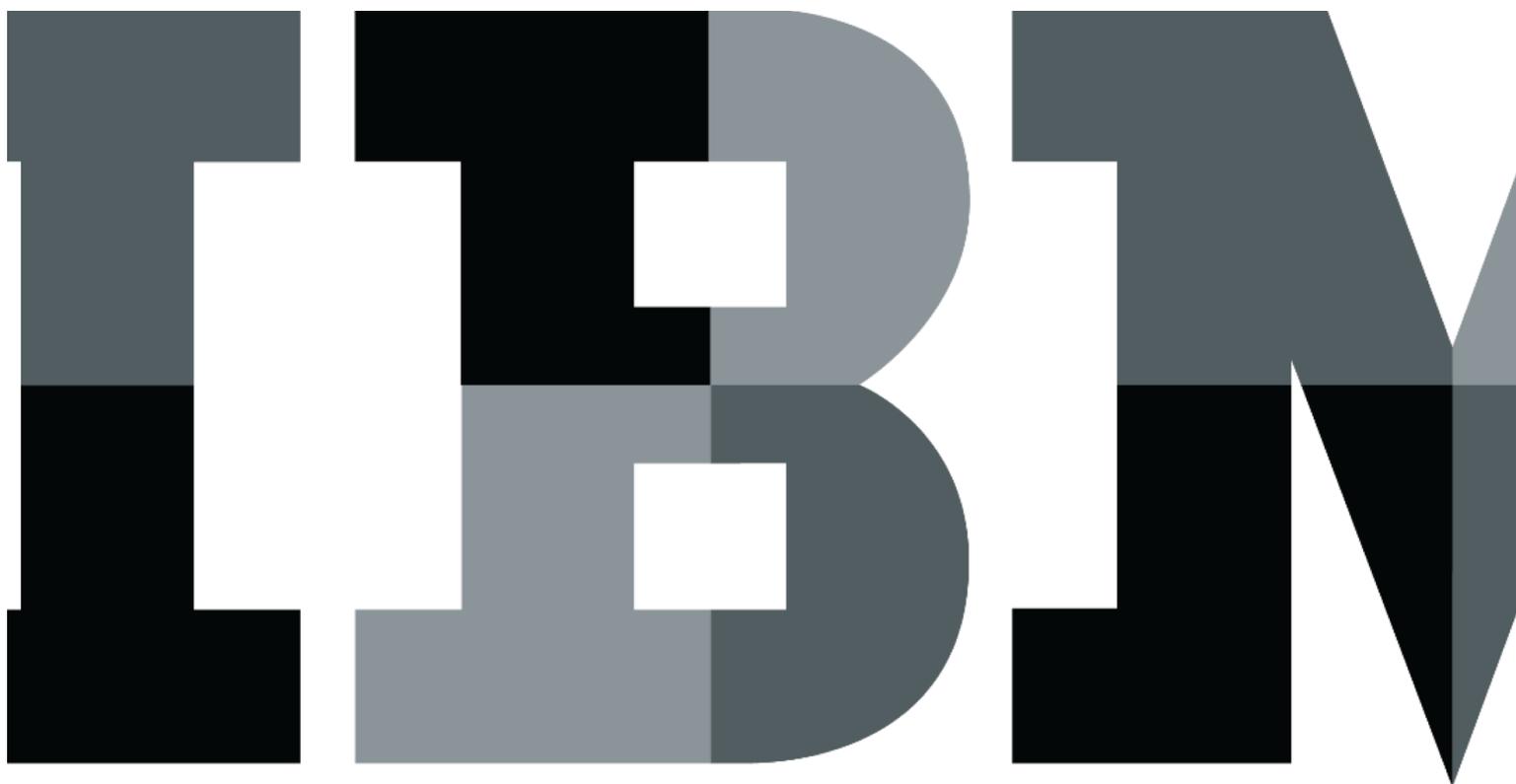


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OVERVIEW

This hands-on lab guides you through building a fully-functional multi-channel Internet web site on IBM's Digital Experience platform. You will experience how easy-to-use and powerful IBM's Digital Experience platform is today. You will also learn more about some of the many powerful integration, personalization and multi-channel capabilities.

In the appendixes, you may further explore the Content Template Catalog (CTC) Demo Internet Conference site, a demonstration site which is available with IBM's Digital Experience platform, to gain more familiarity with additional important concepts. You will also will learn more details on to set up this platform to allow you to do this lab, to discover more integration examples and to apply a few corrections for targeted content on your home page. It is the first business user lab for IBM Digital Experience.

In this business user lab, you play the role of Frank Adams, a Marketing Manager in the fictitious Sales Department of the fictitious Digital Retail company. Your task is to create a new site to trial new smarter claim products for Digital Retail and get the first feedback on those. You will also add the latest beta drone package delivery customer service and add an external image.

You will be guided through the task of building and configure a complete new multi-channel Digital Retail site, which automatically optimizes itself for display on desktop and mobile browsers. These are the steps you will follow:

- (1) Create a new Digital Retail site
- (2) Discover your Site and Make the First Updates
- (3) Add and Update Smarter Claim Product Page
- (4) Build, Add, Test and Review Results of a Vote Smarter Claim Products Form
- (5) Apply Personalization and Multi-Channel Access
- (6) Consume an image asset from external
- (7) Build and discover an integrated Customer Service Beta Drone Package Delivery Application

INTRODUCTION

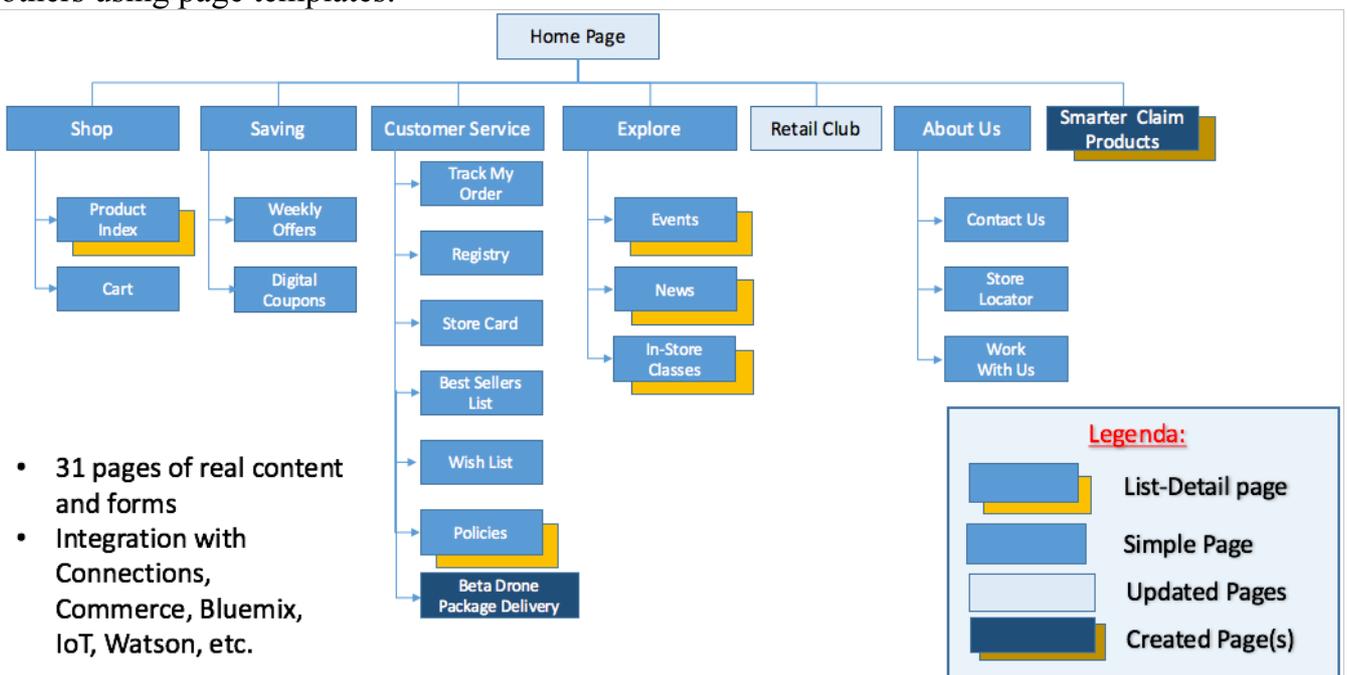
In this lab, you will use a typical retail portal, in this case we used a fictional case: Digital Retail, but you need to find your own fictional customer. Using this site, your customers can easily shop, find possible savings, have access to a growing list of customer services, explore the latest events, news and in-store classes, join the retail club and find more information about us, including a store locator and job offering management. The initial set of customer services are

- Track my order – Your customers can view End-to-End tracking with up to 11 scan events on shipments - from pick up to final delivery - with more frequent updates.
- Registry – Provides access to our registry experts who are available to help our customers one-on-one, free of charge, over the phone and in our stores.
- Store Card – Allow you to create more loyal customers who come buy more often with a dedicated Store credit card they may request online
- Best Sellers List – Allow you to better target your customers
- Wish List – Prepares for future sales
- Policies – List of policies

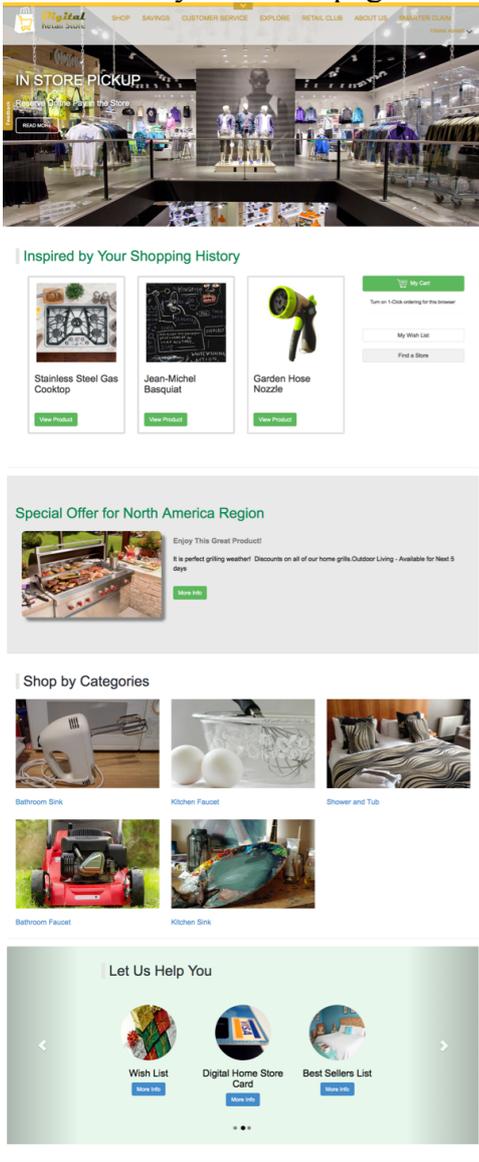
In this lab you will explore different use cases of the Digital Retail site, including adding new pages with content and vote form for exciting new Smarter Claim products, and a new Beta Drone Package Delivery customer service, etc. Each time you will test how this works for your visitors.

And you will add an external image coming from IBM Watson Content Hub, our cognitive SaaS offering which can be trailed for free here: <https://www.ibm.com/us-en/marketplace/cloud-cms-solution>.

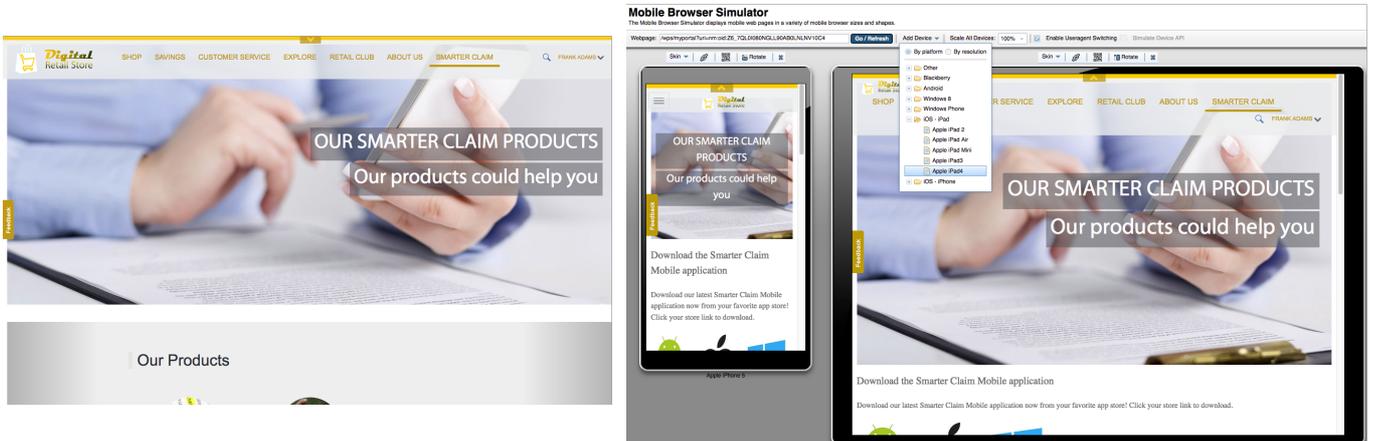
This will be your completed site map, with several pages created with a site template and others using page templates:



This is how your home page will look like:



Your Smarter Claim Products on different devices:



with Smarter Claim product details and a dedicated Vote form

Feedback

Digital Retail Store

SHOP SAVINGS CUSTOMER SERVICE EXPLORE RETAIL CLUB ABOUT US SMARTER CLAIM

FRANK ADAMS

Product A
This is the latest claim product

smarter_claim >

Overview More Details How to Apply

This spectacular simple claiming product will revolutionize the world...

Our Top FAQs

When will I liquam nunc a ligula maximus, ut lobortis lectus fringilla? +

How quickly liquam nunc a ligula maximus, ut lobortis lectus fringilla? +

Need to speak to us?

Give our friendly team a call on:

0800 012 3456

Contact Numbers

Vote for Smarter Claim Products

First Name

Last Name

Email

Select Product

Product A

Product B

Submit Cancel

and the beta Drone Package Delivery customer service page.

Feedback

Digital Retail Store

SHOP SAVINGS CUSTOMER SERVICE EXPLORE RETAIL CLUB ABOUT US SMARTER CLAIM

FRANK ADAMS

Beta Drone Package Delivery

Customer Service > beta_drone_package_delivery

Trial it now

Map Satellite

Shoreline Amphitheatre

Googleplex

Mountain View

Sunnyvale

Santa Clara

DeliveryDrone

IoT Foundation Dashboard

In the lab, we are using IBM Digital Experience V9. The IBM Digital Experience image is running in the Cloud (Skytap), giving you direct access to the IBM WebSphere Portal, IBM Web Content Manager and IBM Forms Experience Builder capabilities, and consuming shared cloud based services (Watson Content Hub, Commerce, Enterprise Marketing Management (EMM), Kenexa), Interact, Connections, Business Process Manager (BPM), Cognos, Mobile Push Notification (Xtify), BPM, etc.).

You will be using the following user IDs and passwords throughout lab

Purpose	User	Password
Marketing Manager	fadams	passw0rd

Lab Handout

Step 1 Create a new Retail Site

In this step, you will discover how easy it is to build a complete new Retail site using IBM's Digital Experience platform. To be able to make any changes, the site is configured to work with specific authors only.

1. Anonymous users are not allowed to make any site changes in this configuration, so you will first need to log in as a user with sufficient authority. First connect to the shared IBM Digital Experience server <http://dx.ibmcollabcloud.com>.

Note: This server is cleaned regularly and should not be used for customized customer demos. If you are doing this lab to prepare a customer demo, you may wish to request your own instance by contacting your IBM.

You will log in as Frank Adams, with user name **fadams**. Click on the **Log in to use authoring capabilities** link at the top of the page. This brings you to the authoring server.



2. Then log in with User ID **fadams** and password **passw0rd** (with a zero).

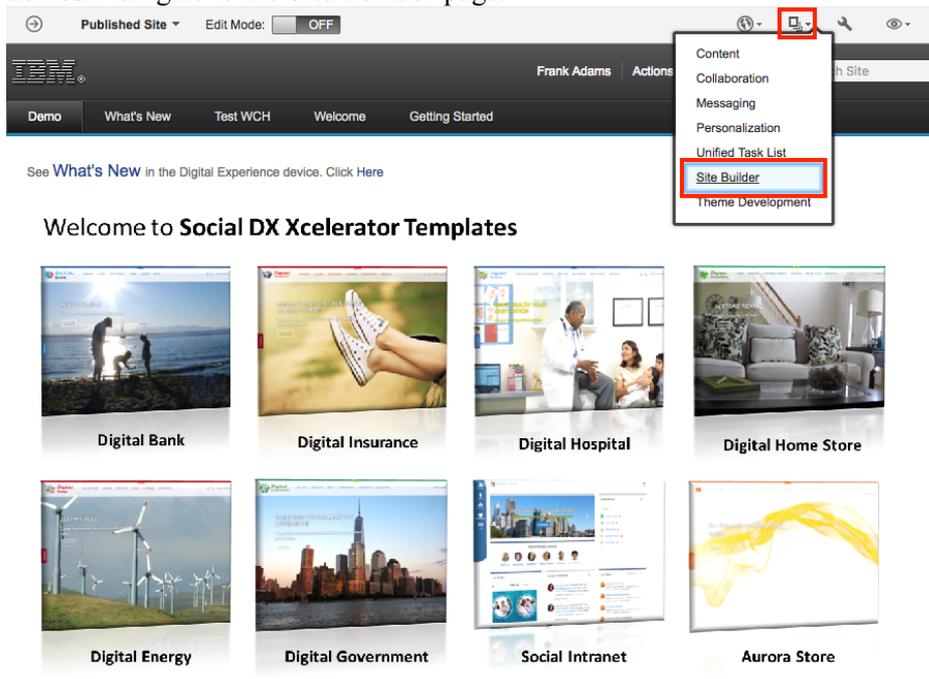
Log in with your Portal account

User ID:

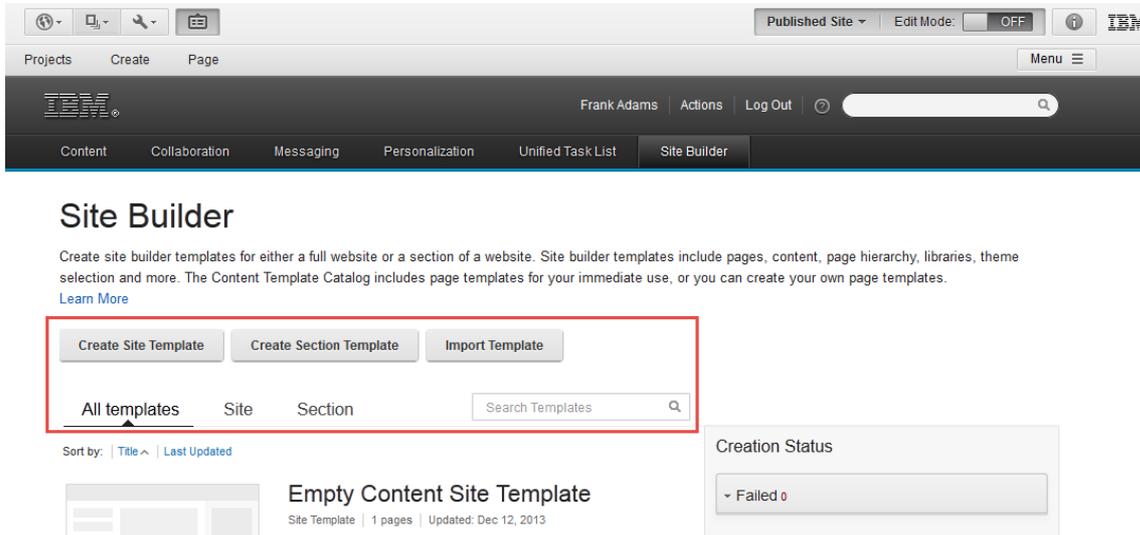
Password:

Not registered? [Sign up](#)

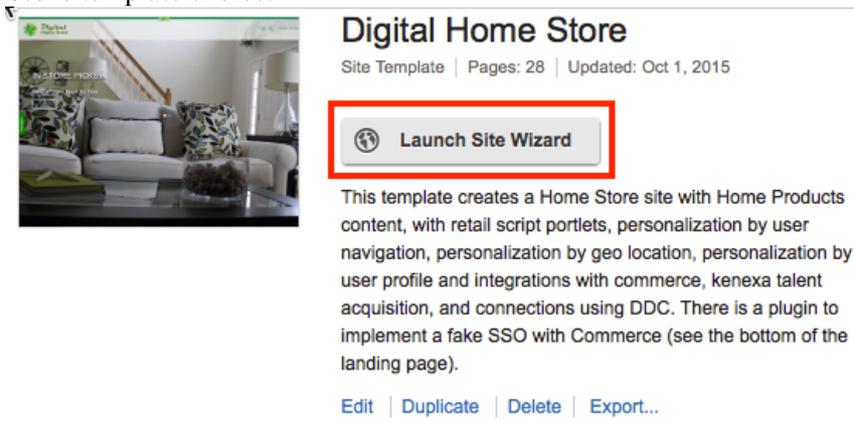
3. Notice that you now have access to much more information and options. This is thanks to the many security and personalization features of the platform, which can tailor what you see based on knowledge about who you are logged in as, among other attributes. In one click you can navigate to the industry demos. Navigate to the **Site Builder** page.



4. The Site Builder lets you quickly roll out new sites, or add new sections to existing sites, using **Site Templates** and **Section Templates**. After you create a site with Site Builder, you can use customize it further as needed. The use of the Site Builder is normally managed by the IT department and used to create the initial set up. However, you will see that it is quite easy to use. Several site templates are provided to allow you to quickly make progress with building an internet or intranet site. You can also easily create new Site and Section templates.



5. Templates are available to create new empty sites from scratch or with ready to use content. They are based on **best practices**, and can be **updated**, **duplicated** and **exported** to other environments, to adapt to your needs. Since you need to build a retail site in this task, scroll down to the **Digital Home Store** template entry and click the **Launch Site Wizard**. If you are more interested in any template, like **Banking**, **Hospital**, **Insurance**, **Government**, **Energy**, you may use that now or later. The instructions would apply similarly, using different content. If you want to create a new empty site and get started correctly, you may want to choose the **Digital Zero** template. The lab instructions use the **Digital Home Store** template choice.



- 6. This launches a **wizard** to step you through providing information about the new site. Note that help is available for each entry. Click on ? to display help information. Default information is pre-populated in the wizard to save you time. Change the default **Unique site name**, **Site title** and **Friendly URL name** to something memorable to you (in our case we are creating a Digital Retail site based on the Digital Home Store site template).

Enter a unique site title, friendly URL name and site name, as you will create it on a shared server and want to find yours back easily !

The friendly URL will appear in your URL address. Then proceed to the next step by clicking the forward arrow >.

Create a Site: Digital Home Store

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: Digital Retail Store

* Friendly URL name: Digital Retail Store

Unique site name: Digital Retail Store

Description: The Digital Retail site, created with IBM Digital Experience

Friendly URL Name
Makes the URL easier for site visitors to remember. For example: http://host-name:10039/wps/myportal/friendly-uri-name

- 7. Each site stores its data in a **Content Library**. You can choose if you wish to use a new content library or share an existing one. As you are creating a complete new site with your own content, you should create a new content library. Give it a unique name and description, and click the forward arrow >.

Create a Site: Digital Home Store

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)

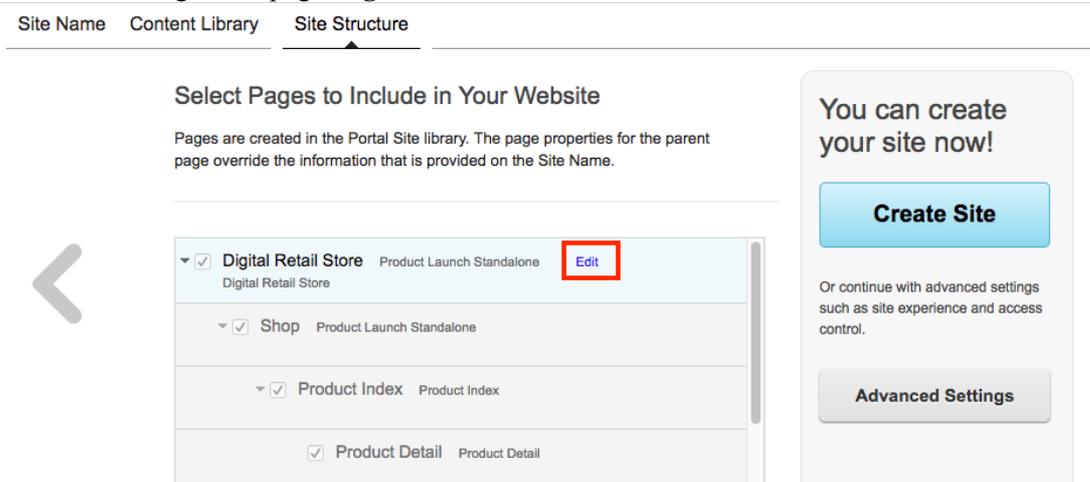
* Unique library name: Digital Retail

Description: Digital Retail

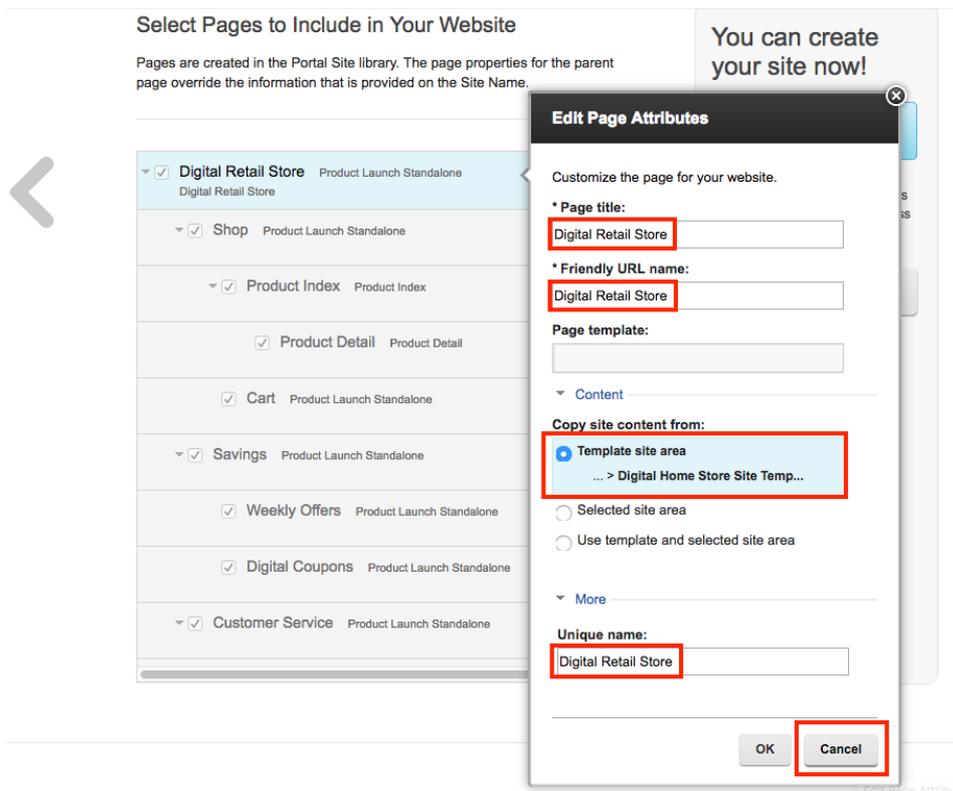
Language: English

You cannot change the language after the library is created.

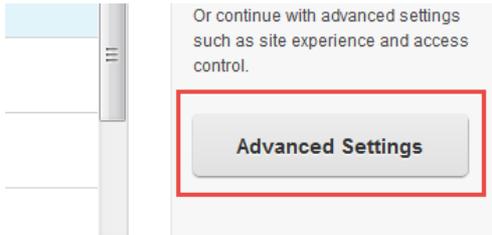
- 8. In this last step, a list of pages which will be included in your site is displayed. These pages were pre-populated based on the site template you chose earlier. You can easily deselect any pages you will not need in your new site.
- 9. Edit the landing home page **Digital Retail Store** now. Click **Edit** as shown.



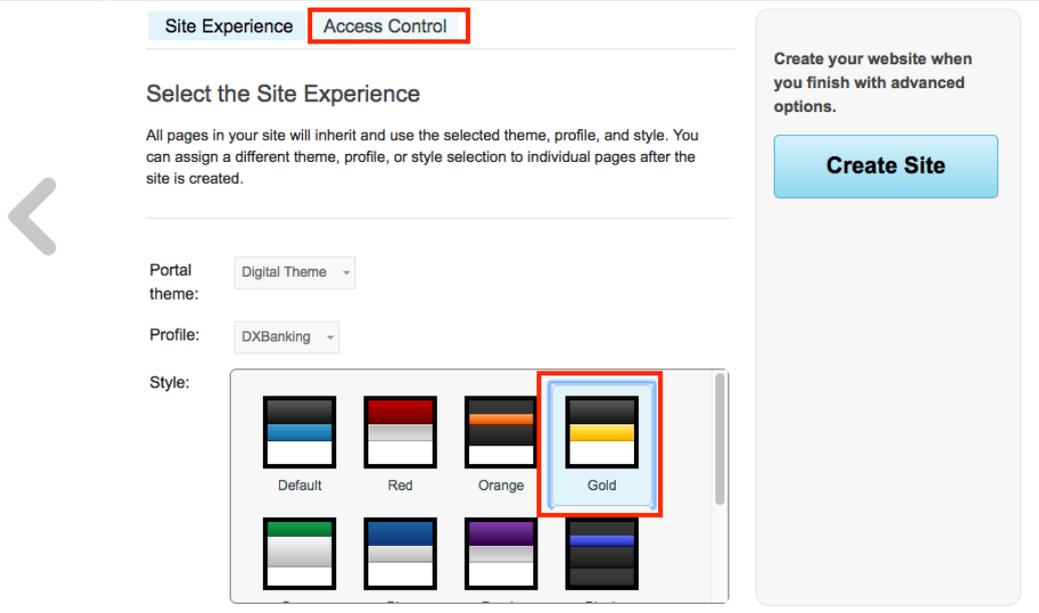
- 10. It shows that this page takes the configuration information you provided earlier. The page title, URL and unique name could be modified here. It also shows from where it will copy its new content from. The page itself is based on a specific page template. You will learn more on this later. Click **Cancel**.



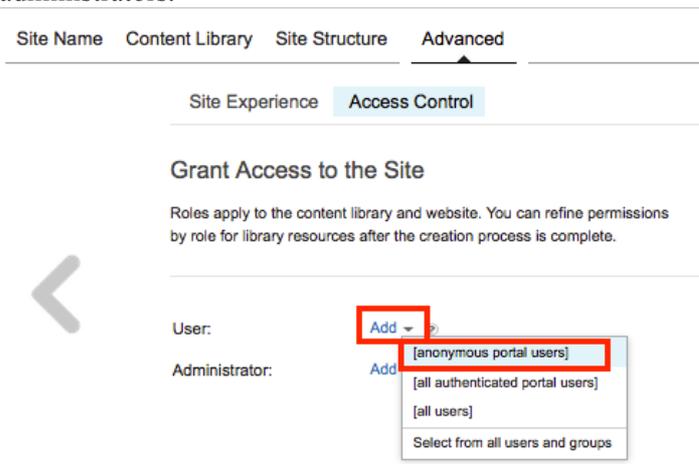
11. Click **Advanced Settings** to explore other ways to customize your site before it is created.



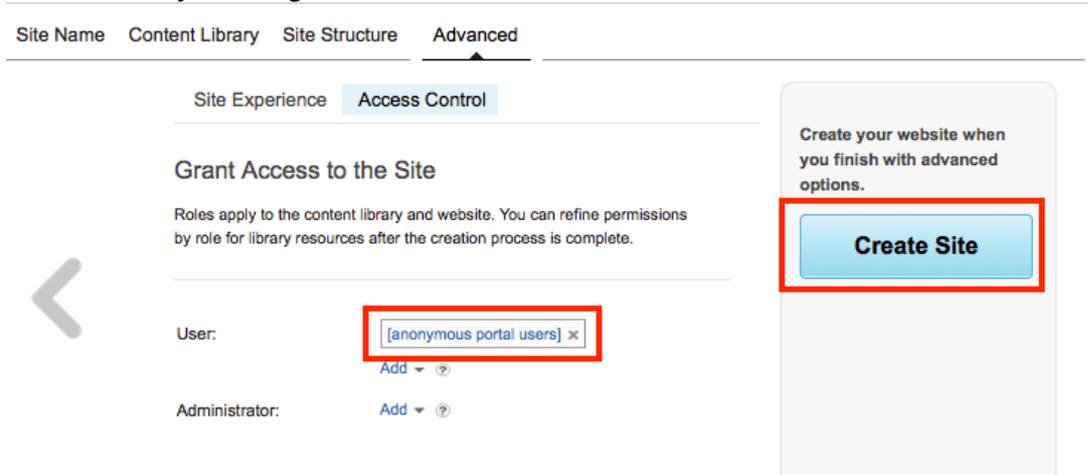
12. On the **Site Experience** panel, you can select a **Portal theme** (the graphical layout of your site), the **Profile** (indicating what options are available to site users) and the **Style** (color settings). Leave the theme and profile as-is, but choose **Gold** instead of the default Green style. Then click **Access Control**.



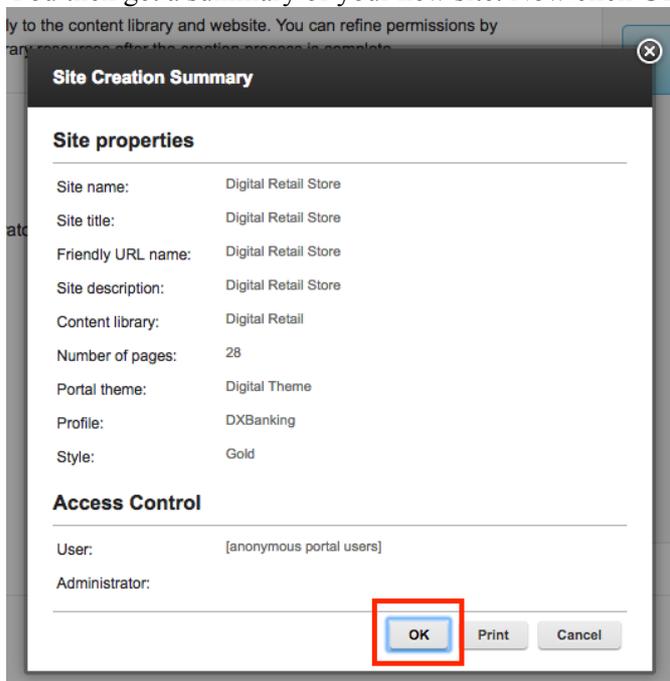
13. Here you define the user and administrators of your site. You want to make it accessible to anonymous users. Therefore, click **Add** and select **[anonymous portal users]** the can set up your site users and administrators.



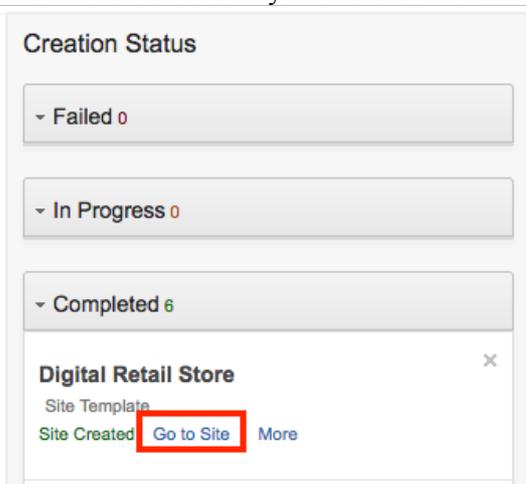
14. Check that they will be granted access and then click **Create Site**.



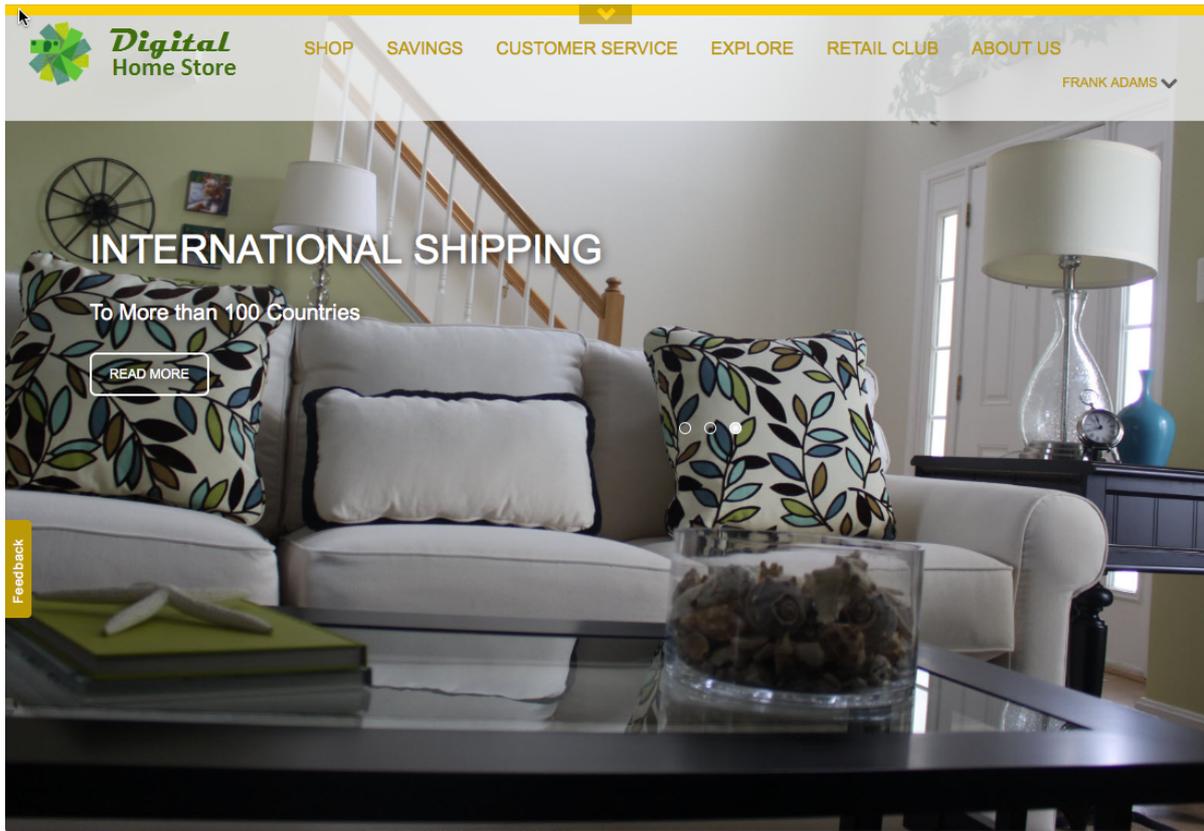
15. You then get a summary of your new site. Now click **OK**, to create it.



16. The site is first being validated and then gets created in the background. Be patient, as a complete new internet site with all pages of content is now being created for you automatically. After a short while, your site should be ready for further customization. Click the **Go to Site** to open it.

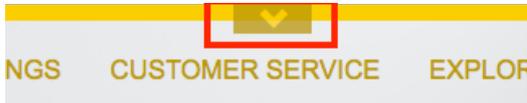


__17. Your new site is now published and available for use.

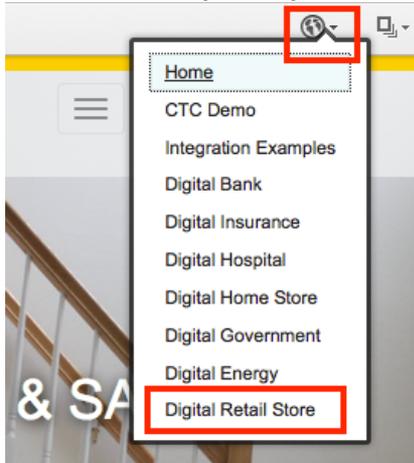


__18. It is also available under the site menu in edit mode, in case you need to come back to it later.

Bookmark it now for future usage. Check this now. Go to the **Edit Mode** first



__19. Then look it up under the site menu. The first ones are the ready to use demo sites you may use to demonstrate, but should not modify. Your new site should be under Digital Energy, and depending on the number of sites, you may need to scroll further down.



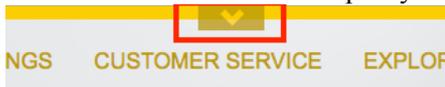
You have successfully created your first site and are now ready to further customize it.

Step 2 Discover your Site and Make the First Updates

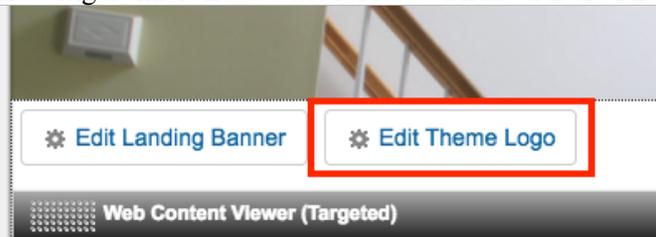
In this section, you will discover how easy it is to make changes. You will first customize the logo of your new Digital Retail site. This would normally be done by your design team. Then you will also have a first look at your newly created site and make your first few simple changes.

To modify the Theme logo, you will use a customized feature available only in this specific site (it is not an out of the box feature of the product). This feature shows one fantastic capability of IBM Digital Experience solution: you are able to extend the product using some of the many extension points available in the product's open architecture.

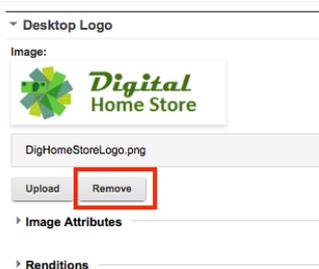
1. If you have not done already, on the Digital Retail home page, switch to **Edit Mode** to change the logo. Click on the **arrow** on the top of your page to switch your page to **Edit Mode**.



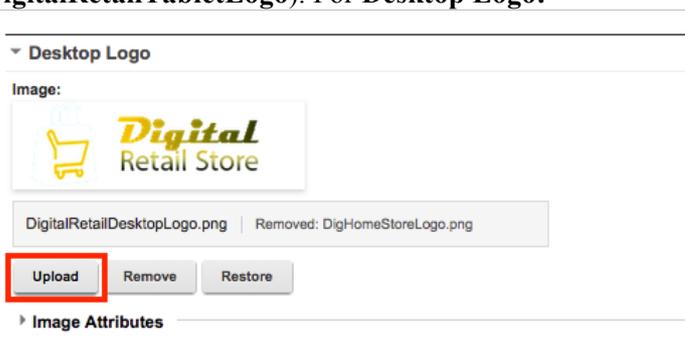
2. Now scroll down the page. Below the landing image, you can change the banner and logo. Now you will only change the logo. You could also change the Landing Banner with all promotions here with the Edit Landing Banner. Leave this for now. Click on **Edit Theme Logo**.



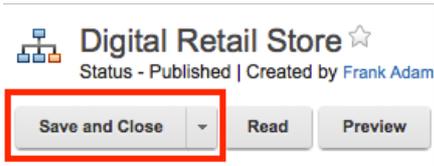
3. Scroll down to choose your "Desktop Logo", "Smartphone Logo" and "Tablet Logo". For each image element, click **Remove** first (to clean the previous image size).



4. Then click **Upload** to add a new picture. Choose a logo picture that has a reasonable size, eg. 230x70 pixels for the **Desktop** and **Tablet** one and 135x35 for the **SmartPhone**. Feel free to use any image that you want (if you want, there are some images available on **Desktop/Digital Experience Labs/Helper Files/User Tour: DigitalRetailDesktopLogo, DigitalRetailSmartphoneLogo and DigitalRetailTabletLogo**). For **Desktop Logo**:



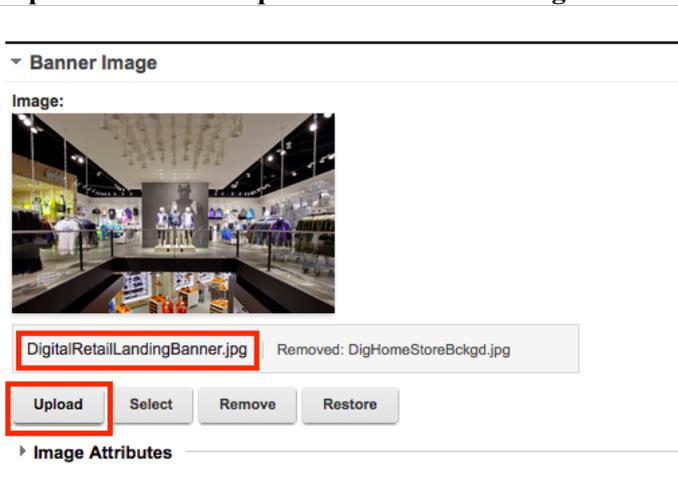
5. Do the same for the SmartPhone and Tablet logos. After you upload the 3 logos, click **Save and Close** button.



6. Now change the Landing Banner image. Click on **Edit Landing Banner**.



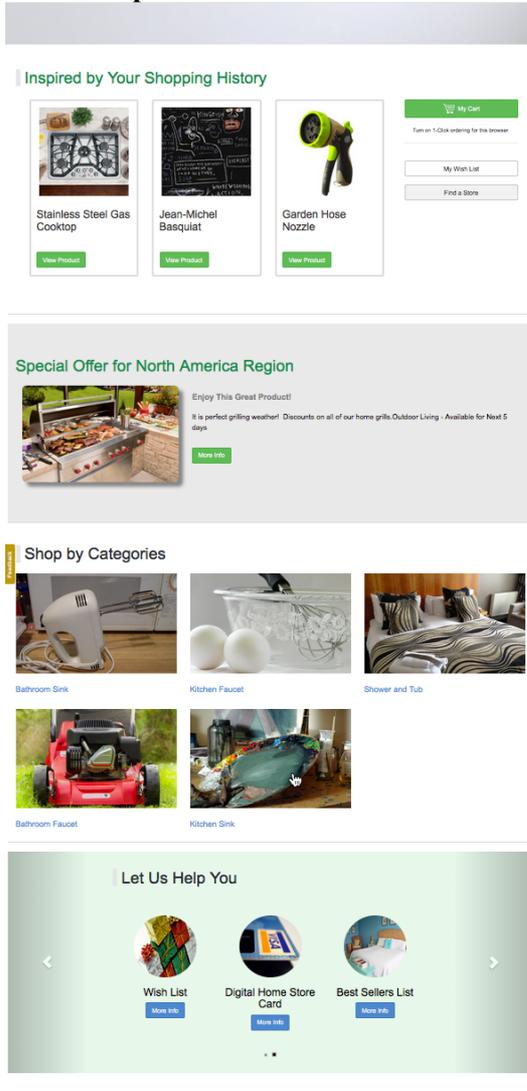
7. Choose a high definition image (1980x1080) for your new banner. Your existing site, Google or free images sites, like <http://morguefile.com>, may provide you this. You may also use the **Desktop/Digital Experience Labs/Helper Files/User Tour: DigitalRetailLandingBanner.jpg**.



8. Click **Save and Close** and switch back to View Mode to see your results.



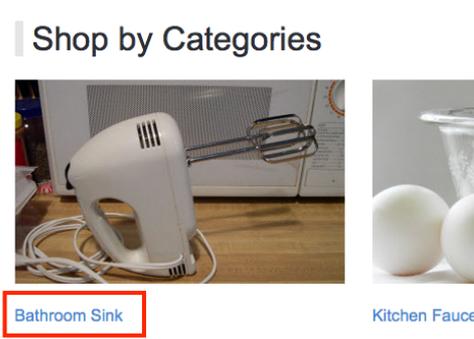
9. Now you should see your customized Digital Retail site. Later in the lab, you will test the logo on the Smartphone and Tablet. Have a look at the home page of your new site, which is based on one of the many out of the box page templates: the landing home page template. Below the top banner, you will find a set of additional information (portlets), such as your shopping history **Inspired by Your Shopping History** allowing you to buy the same items easily again, a special geolocation based offer (this could be for North America, South America, Europe and Asia and uses your IP address to detect where you are connected). Then there is the **Shop by Categories** which adapts itself to your navigation and at the bottom **Let Us Help You** with several recommended links to specific pages in the site.



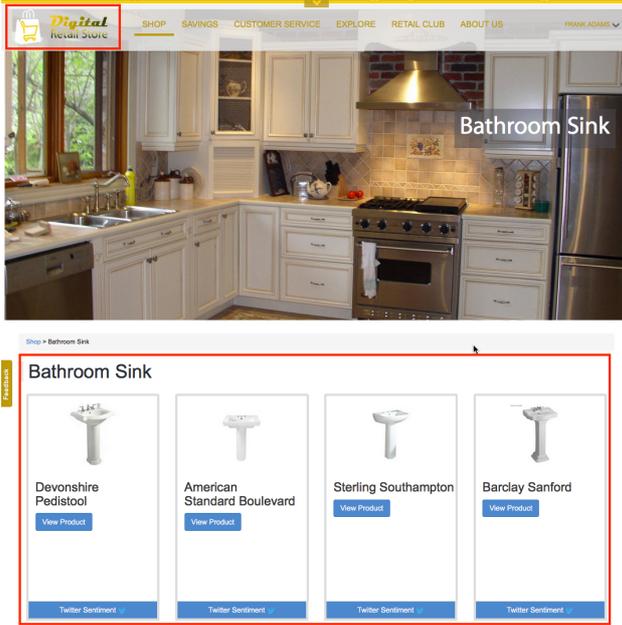
10. Now navigate to the Shop. Click **Shop**.



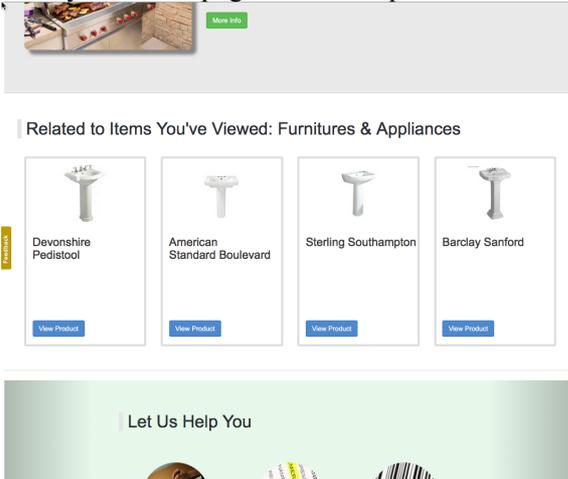
11. And click the **Bathroom Sink** category.



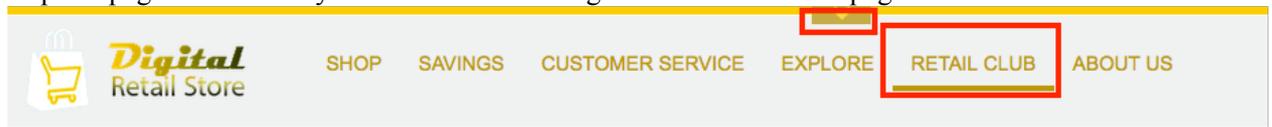
12. Notice the products in this category and then go back to the home page. Click on your logo.



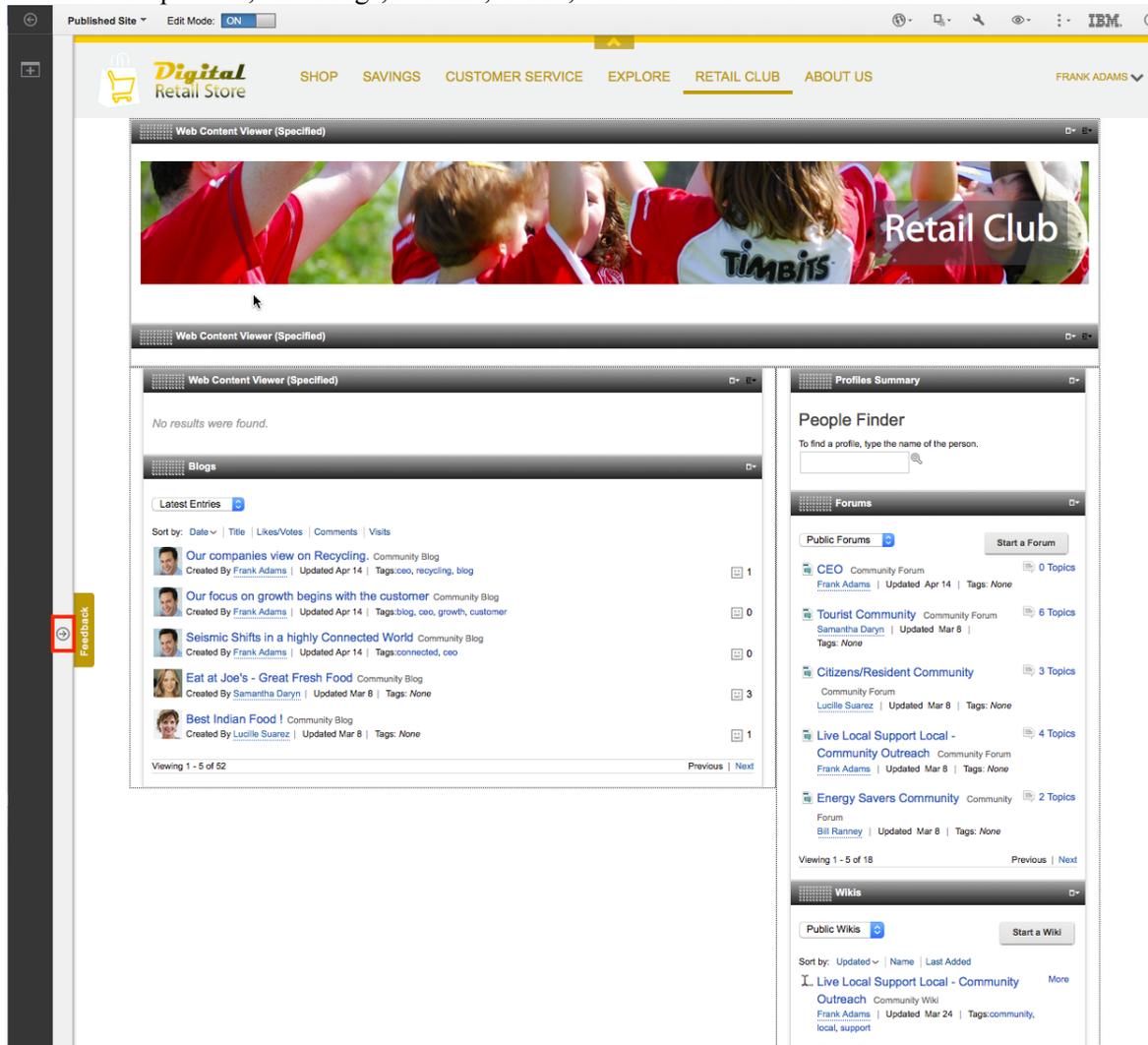
13. Now your home page shows the products of that category instead:



14. You will now go and explore the rest of the site. You may visit the Savings, Customer Services, Explore pages first. Once you are done with that go to the **Retail Club** page.



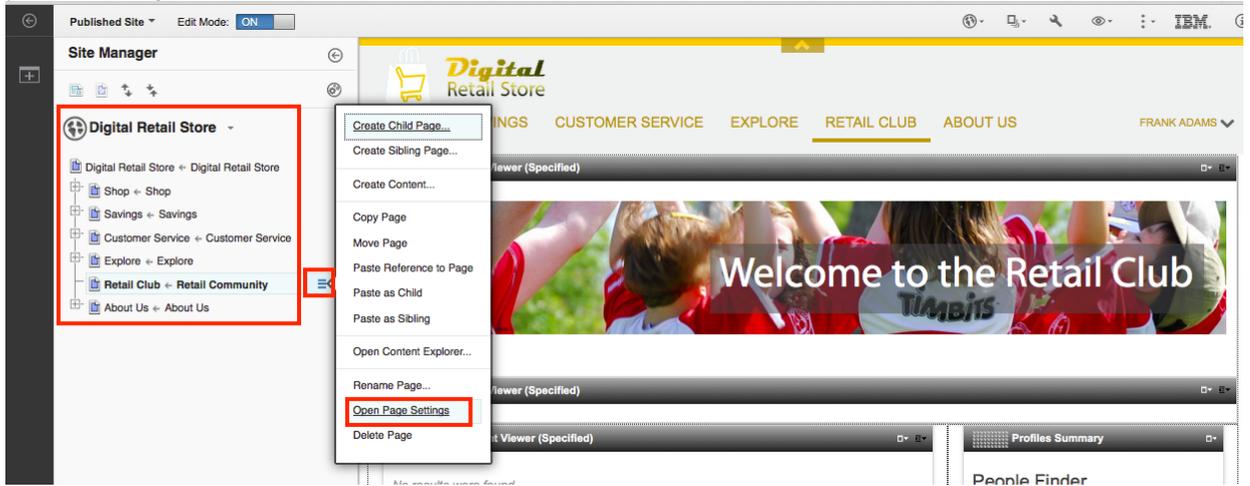
15. You need to make a simple change to the banner text and associate it with a specific IBM Connections community. Switch to **Edit Mode** first. Click on . This shows you several placeholders, or portlets. You will see several Web Content Viewer portlets show web content, and some IBM Connections portlets, like Blogs, Forums, Wikis, etc.



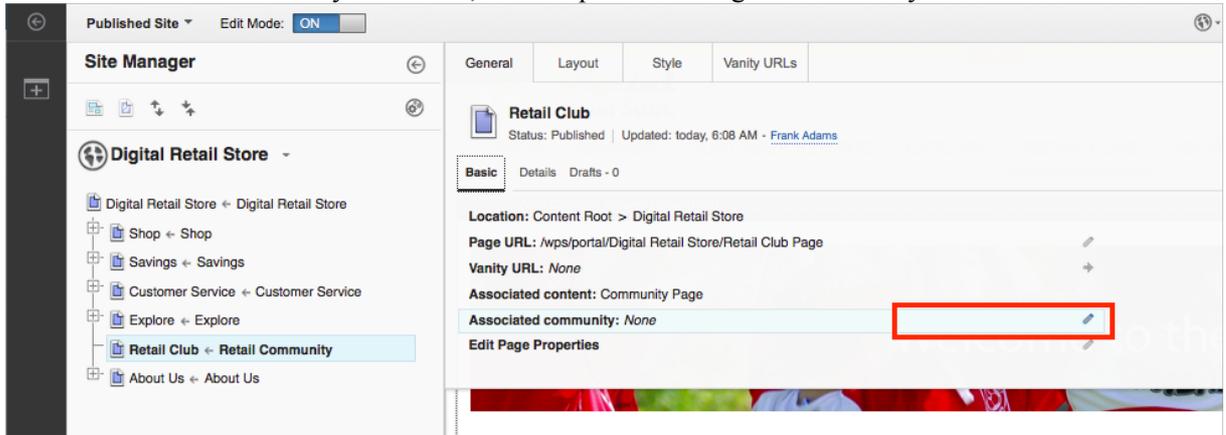
16. First change the content of the banner. Simply click into the text field and add **Welcome to the** as shown.



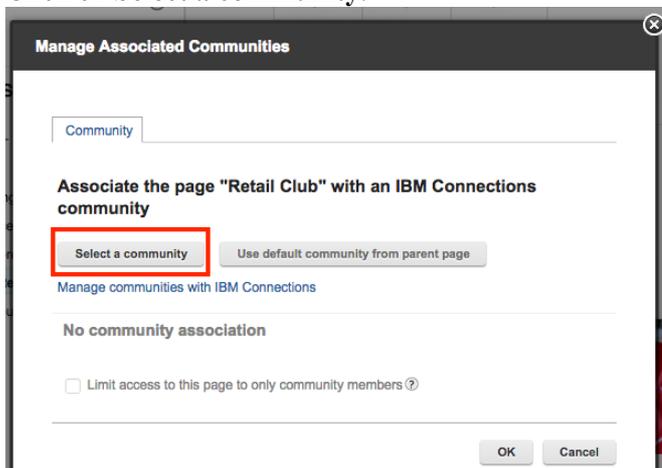
17. Then click outside of that box the content (or click Tab) and it is directly published or put in a workflow, per the configuration. In the current configuration, it is published directly (you may need to refresh the page to see your change). You can also use draft content, decide whether site changes should be subject to workflow, preview how the changes will look to different audiences, and finally schedule the site updates to be published at a specific time in the future. You can this with any of the pages on your site for text, images, etc. Now show the Site Manager. Click  on the left and it shows you the navigation tree.



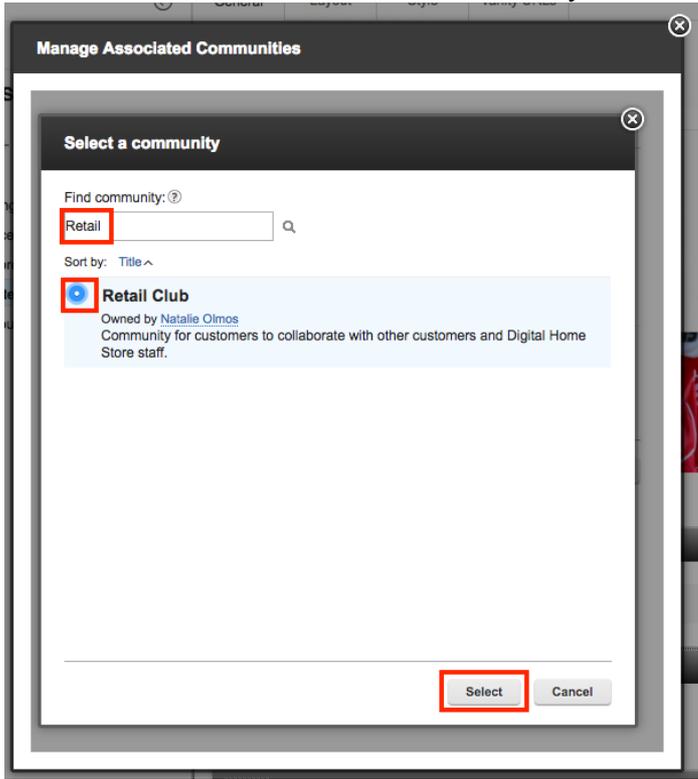
18. You notice that there is currently no community associated with this page. Hence all global social content shows, but none that are specific to a community. You will now associate the existing Retail Club community to it. You may create new Connections Communities when creating new pages and associate them automatically. However, this template is configured to make you select one.



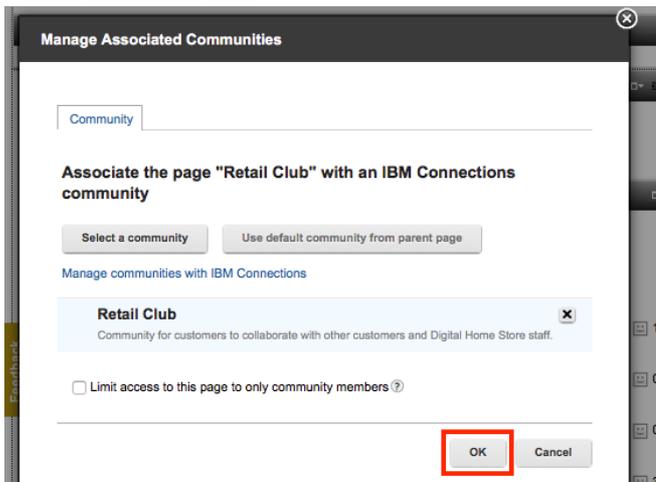
19. Click on **Select a community**.



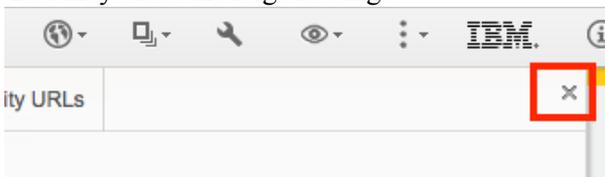
20. Then find and select the **Retail Club** community. Click **Select**.



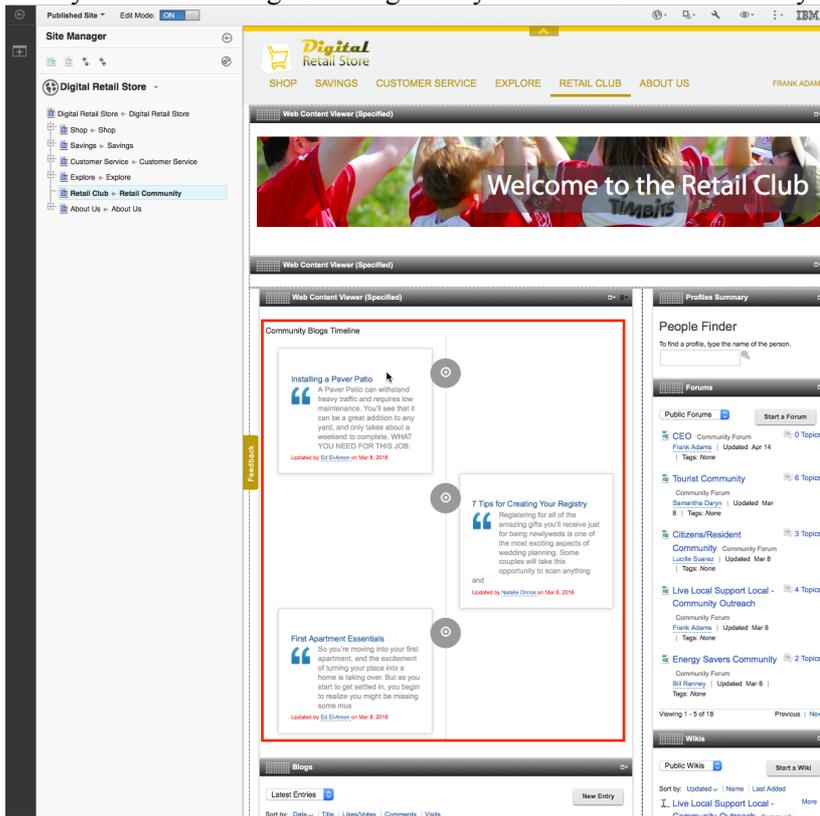
21. Check and click **OK**.



22. You may close the Page Settings.



23. Now you have the blogs showing from your Retail Club community!



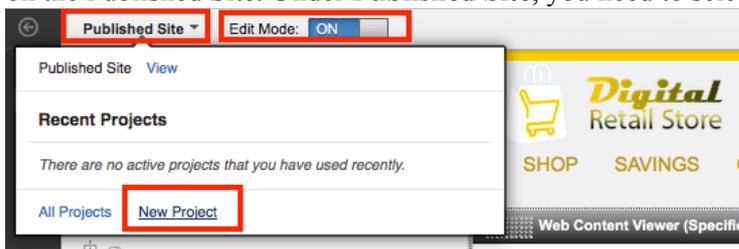
You have successfully customized your portal theme logo, discovered some parts of your new site and learned how to customize it.

Step 3 Add and Update your New Smarter Claim Products Pages

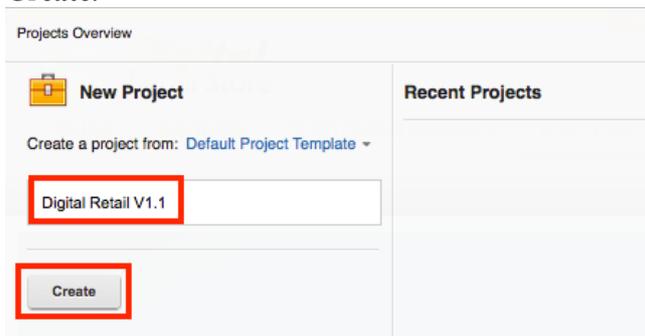
In the previous step, you have made some simple changes that were published directly. In this step, you will prepare several changes that you want to coordinate in a team, preview and finally publish together. You will add new pages to manage **Smarter Claim products** in your Digital Retail site. Then you will update these pages with the correct content. In further steps, you will further enhance these pages and test them before publishing.

The multiple changes are managed in **Projects**. Hence, you first need to create a specific project for your site that you will call **Digital Retail V1.1**. Know that you can have multiple projects in parallel, e.g. Another project called **Digital Retail V2** where other and the same content and design may be created, deleted and modified, and published on a different date.

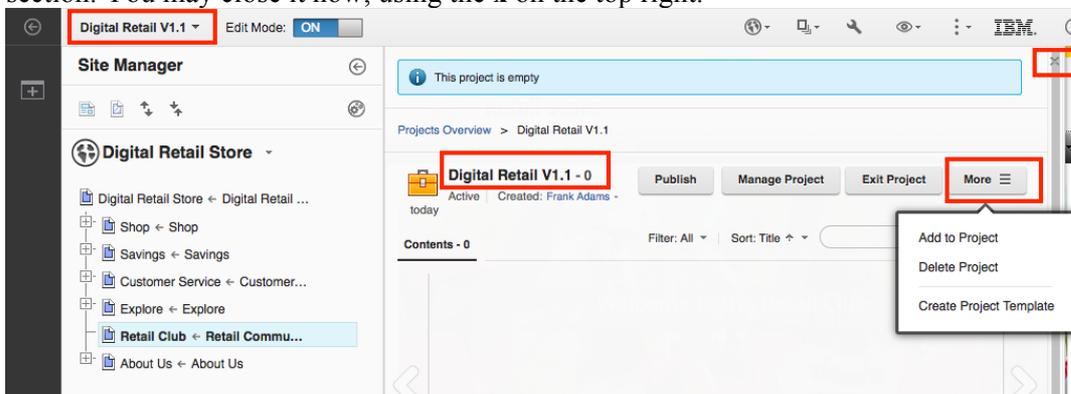
1. You will first create a new Project to manage your changes to the site. Currently you are working directly on the Published Site. Under **Published Site**, you need to select **New Project**.



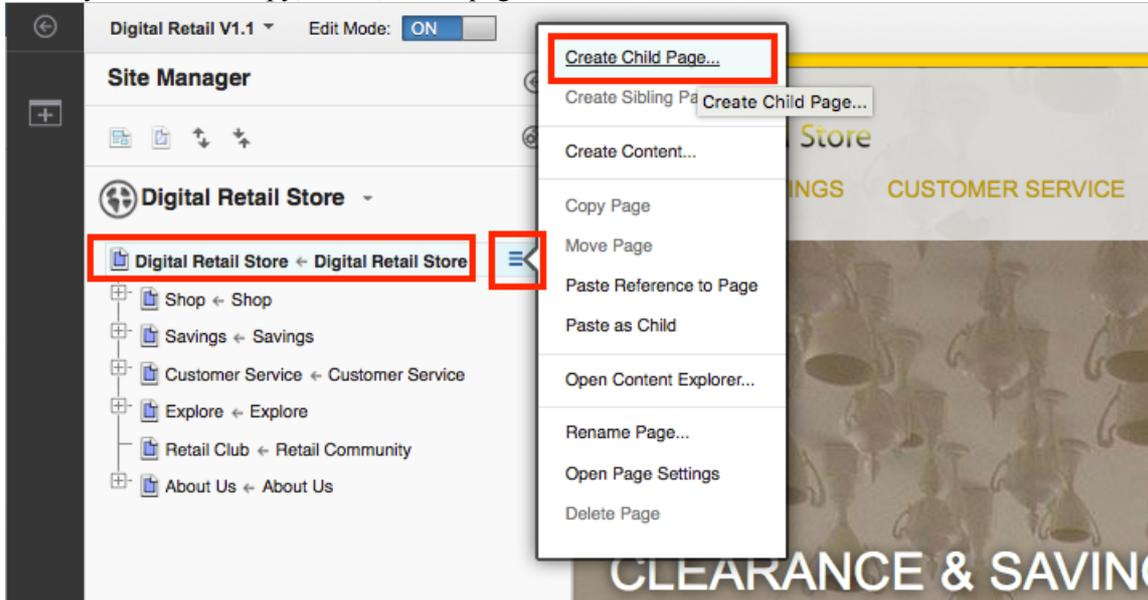
2. Name your project, like **Digital Retail V1.1** (or any name you want that associates to your site) and click **Create**.



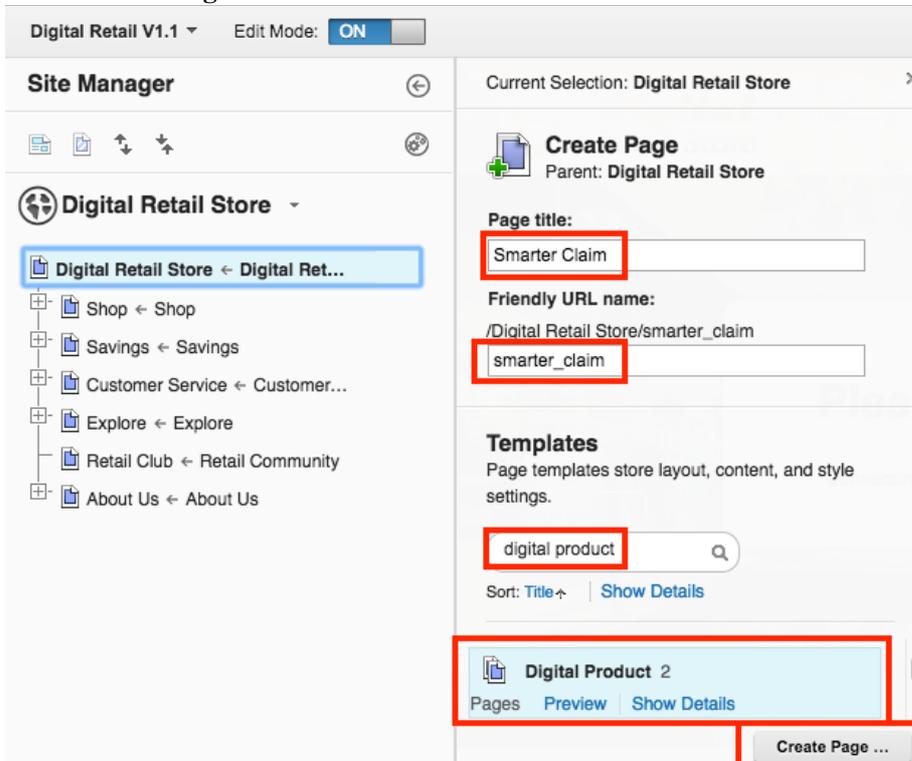
3. You should see a message confirming the new project was successfully created. In the top toolbar, you should now see this project name. The Projects panel provides information about each project and gives you options to manage your projects. Optionally, select **More** to see additional project options. The project is initially empty and all elements you will be creating now, will appear under the Contents section. You may close it now, using the x on the top right.



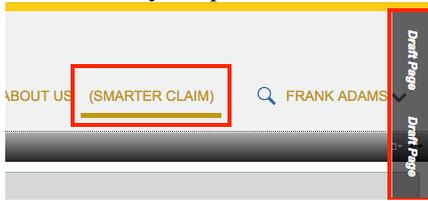
4. You will now create a new page and make updates there. First ensure the Site Manager is showing. If this not the case, click on  and the left. In the Site Manger select the home page, **Digital Retail Store**. Then you should see your pages. Click on the menu of **Digital Retail Store** and **Create Child Page**. Notice you can also copy, move, delete pages and much more.



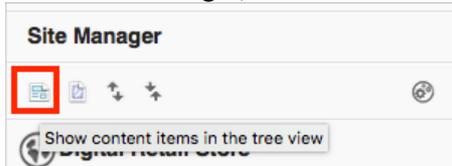
5. Name your new page **Smarter Claim** and change the friendly URL to remove the space from that which was generated automatically for you. Notice the wide variety of page templates you can choose from. Next, enter the text **product** in the search dialog to search for our specific Events template. Select **Digital Product** from the search results. Notice you can preview the page template and view additional details. Click **Create Page**.



- 6. This will create two pages, an index and corresponding details page based on this template. Both are configured with a specific layout and pre-defined portlets with ready to use components and content to start with. Note that the page shows in different ways that it is still in draft and part of a project and not available on your published site:



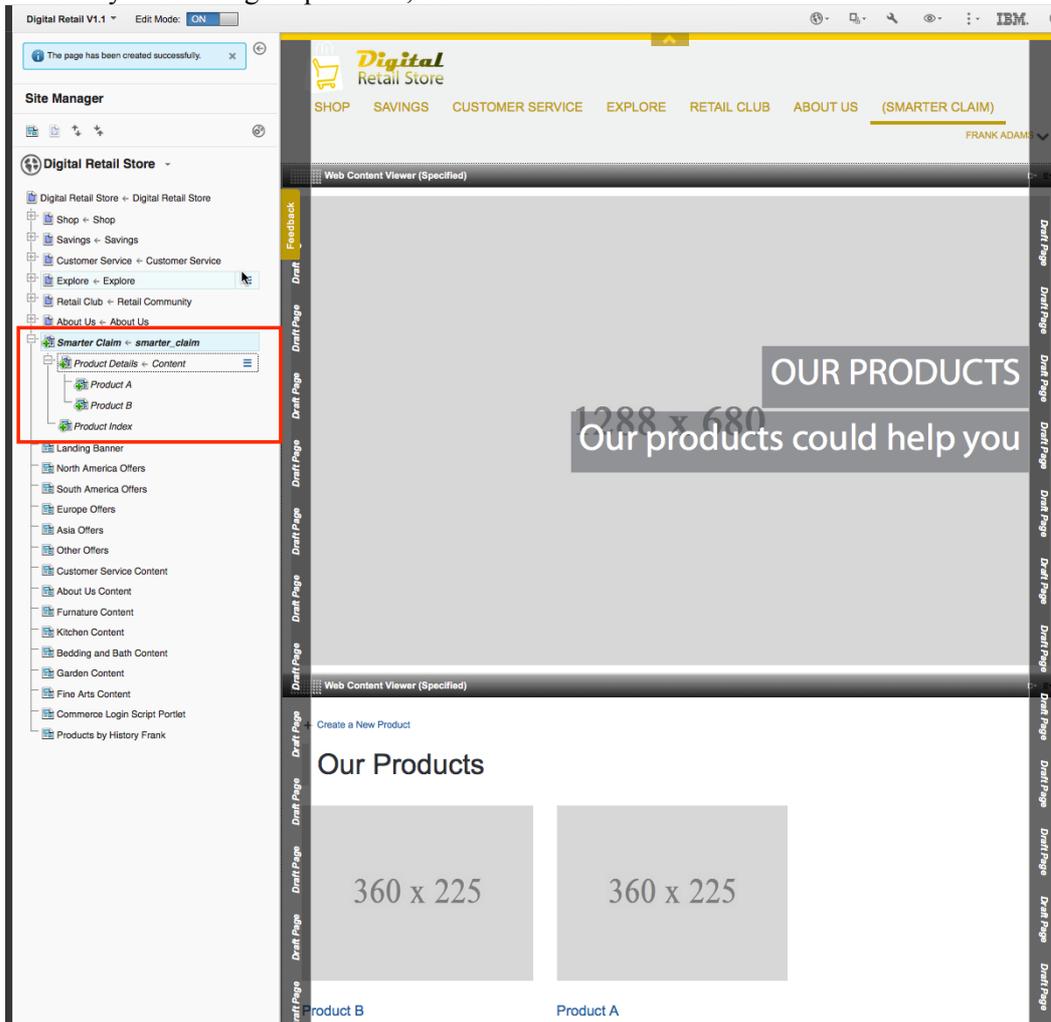
- 7. In the Site Manager, click  to show content items in the tree view.



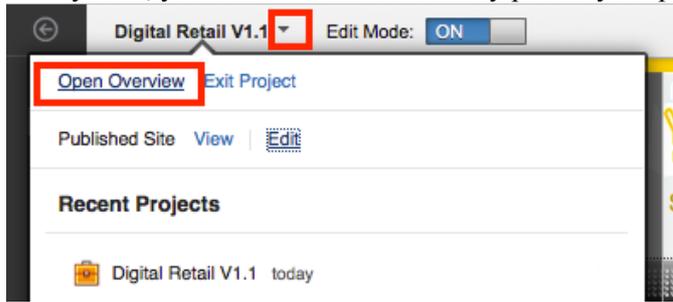
- 8. Then expand the tree completely for the page you just created.



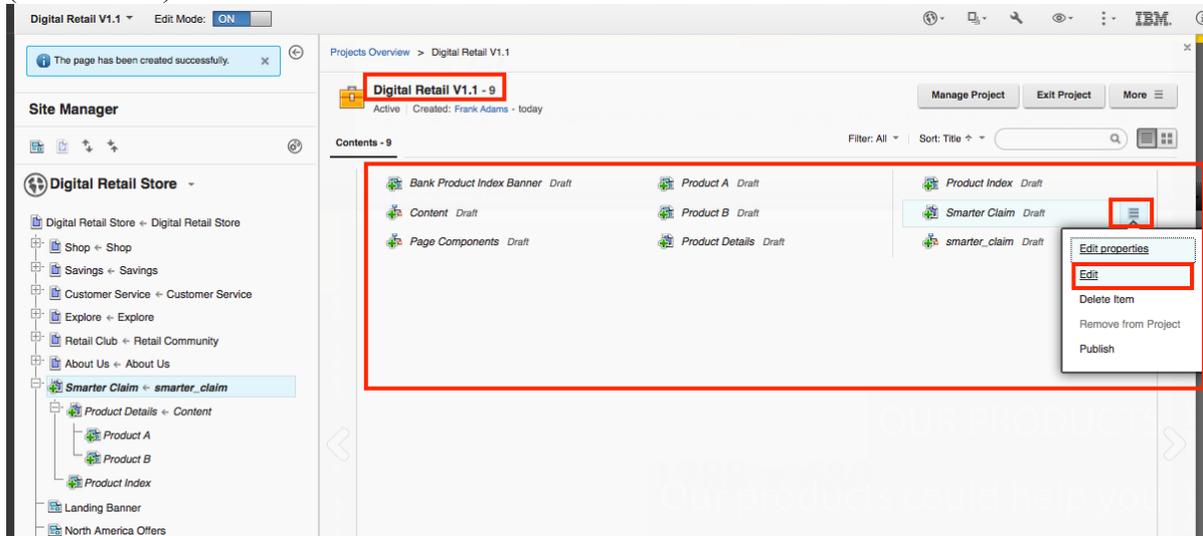
- 9. This gives you a good overview of all pages and content in it. The **Landing Navigation Banner** contains the banner image and content, as well as the configuration to use to show the products. You can see also two ready to reconfigure products, **Product A** and **Product B**.



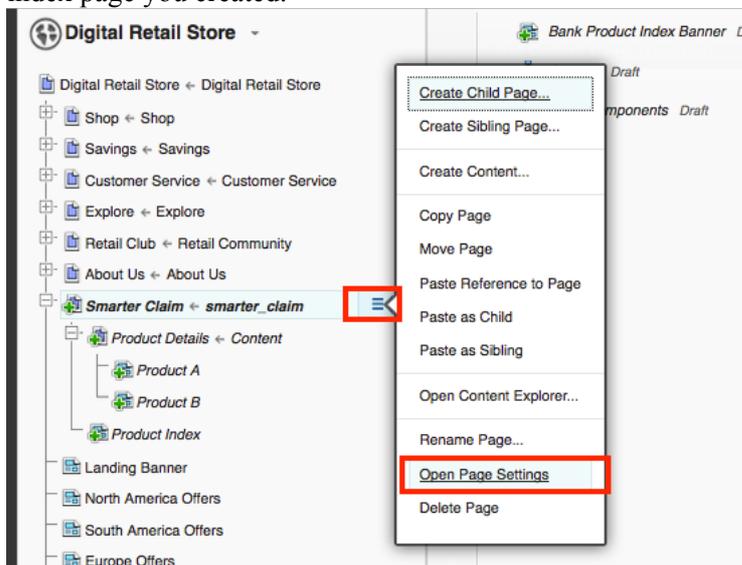
10. At any time, you can see what is currently part of your project. Click on  and **Open Overview**.



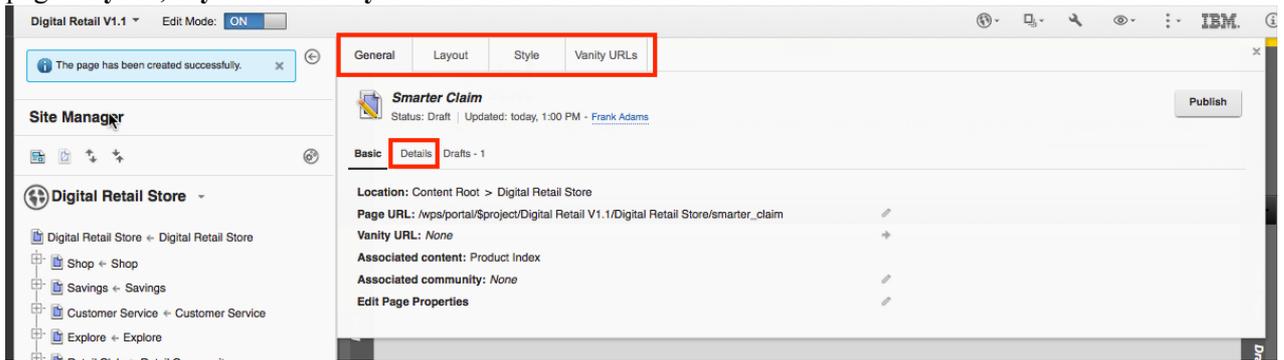
11. Here you see in more details of your current project **Digital Retail V1.1**. This allows you to find and work individual items and to go directly to each content. For example, if you wish to open the draft Smarter Claim page the next day after a logout or your session expires, log in and select the project again, find the item you wish to edit., select its menu and click **Edit**. Here it shows how to edit the **Smarter Claim** page. However, you will work simpler in the What You See Is What You Get (WYSIWYG) mode. Close the Overview .



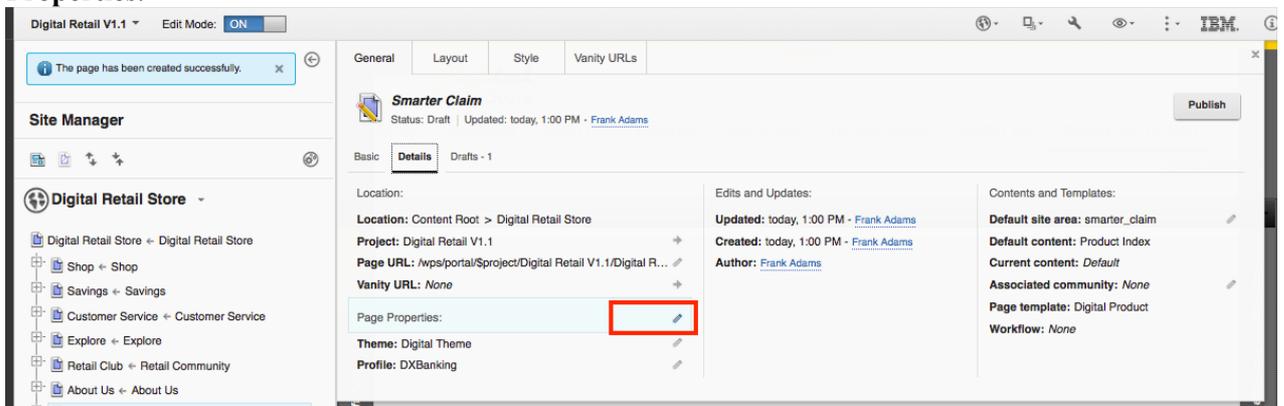
12. Click the **Smarter Claim page menu** and click **Open Page Settings** to see more details on the draft index page you created.



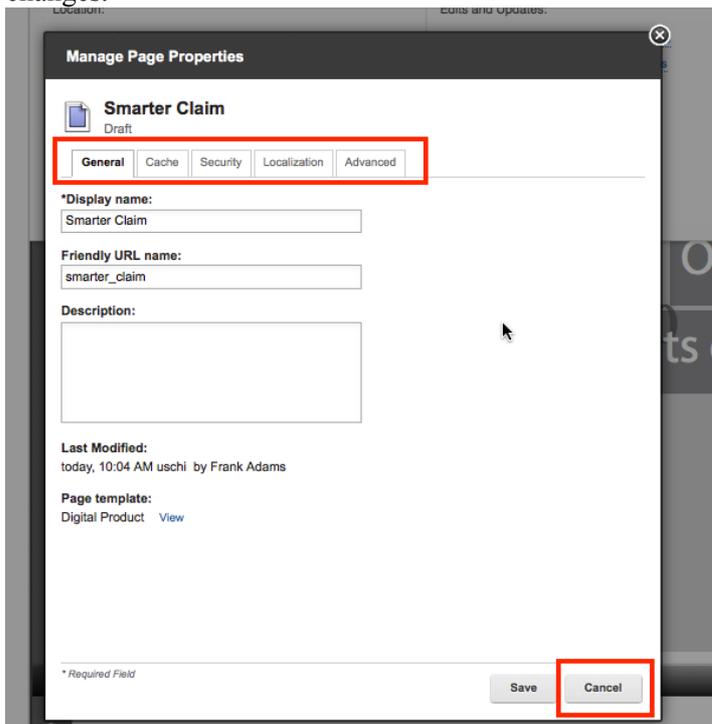
13. This shows you the general basic information about this page which you could directly edit. It also has the actions to **publish** it (as it is in draft now) and **delete** it. On the left you also have direct access to the page **Layout, Style and Vanity URLs**. Click on **Details**.



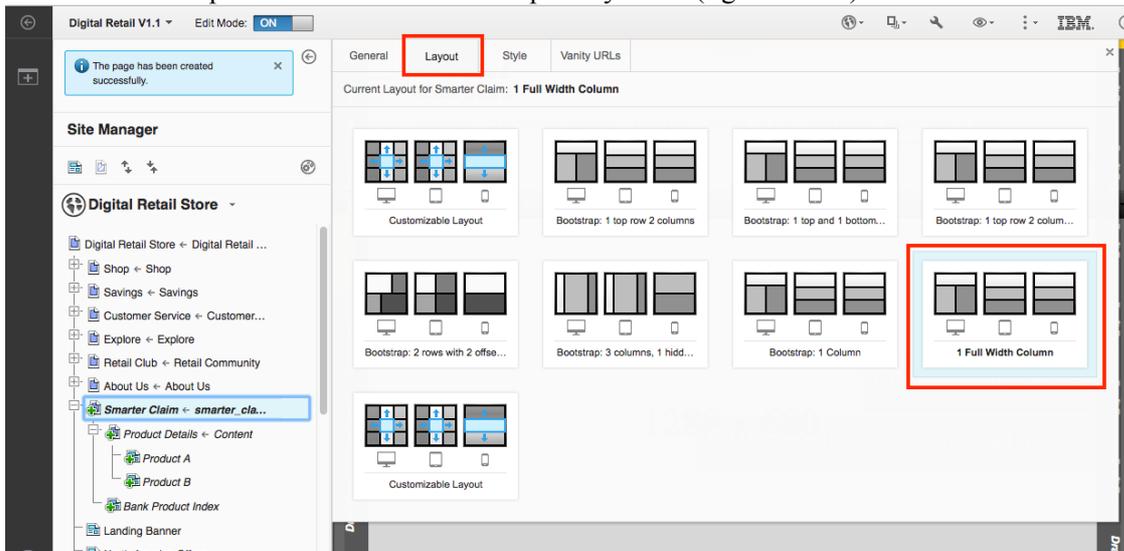
14. This shows some more details on your page, like the project, theme and profile used. Now edit the **Page Properties**.



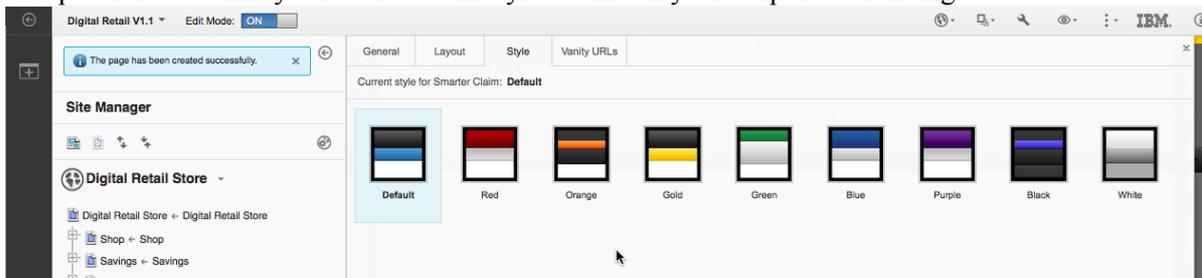
15. Explore the **Manage Page Properties** options. Take a look at the **General, Cache** (single user/across users and interval), **Security** (with author and owner selection as well as workflow settings for this page), **Localization** (for page title translations) and **Advanced** (with theme and profile selections, allowed portlets control, page versions and more). Click **Cancel** or close the window to exit without making any changes.



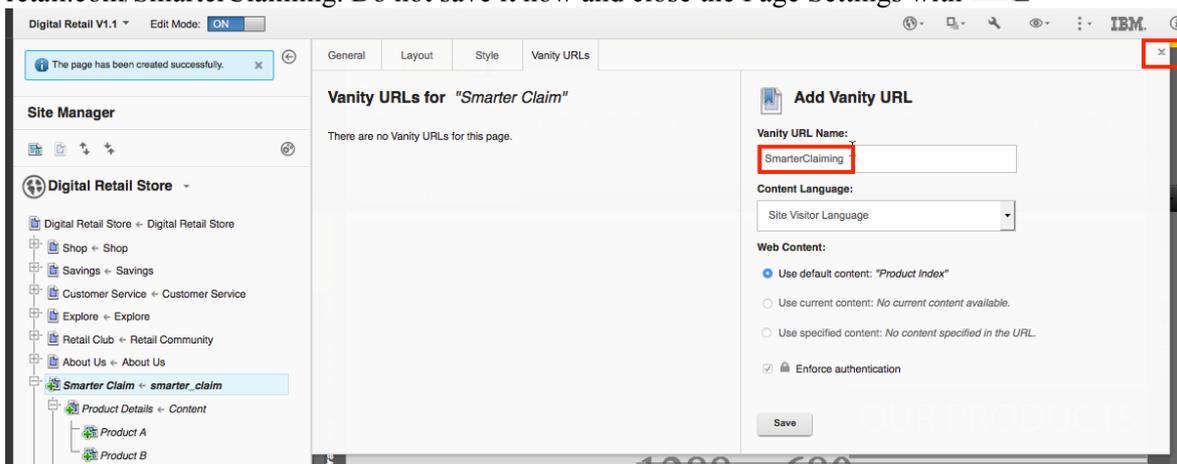
16. Next click **Layout**. These are out-of-the-box layouts you can select from. Notice the current layout is highlighted, and information is provided about how the cells of your page would show on Desktop, Tablet and Smartphone devices and in what priority order (light to dark).



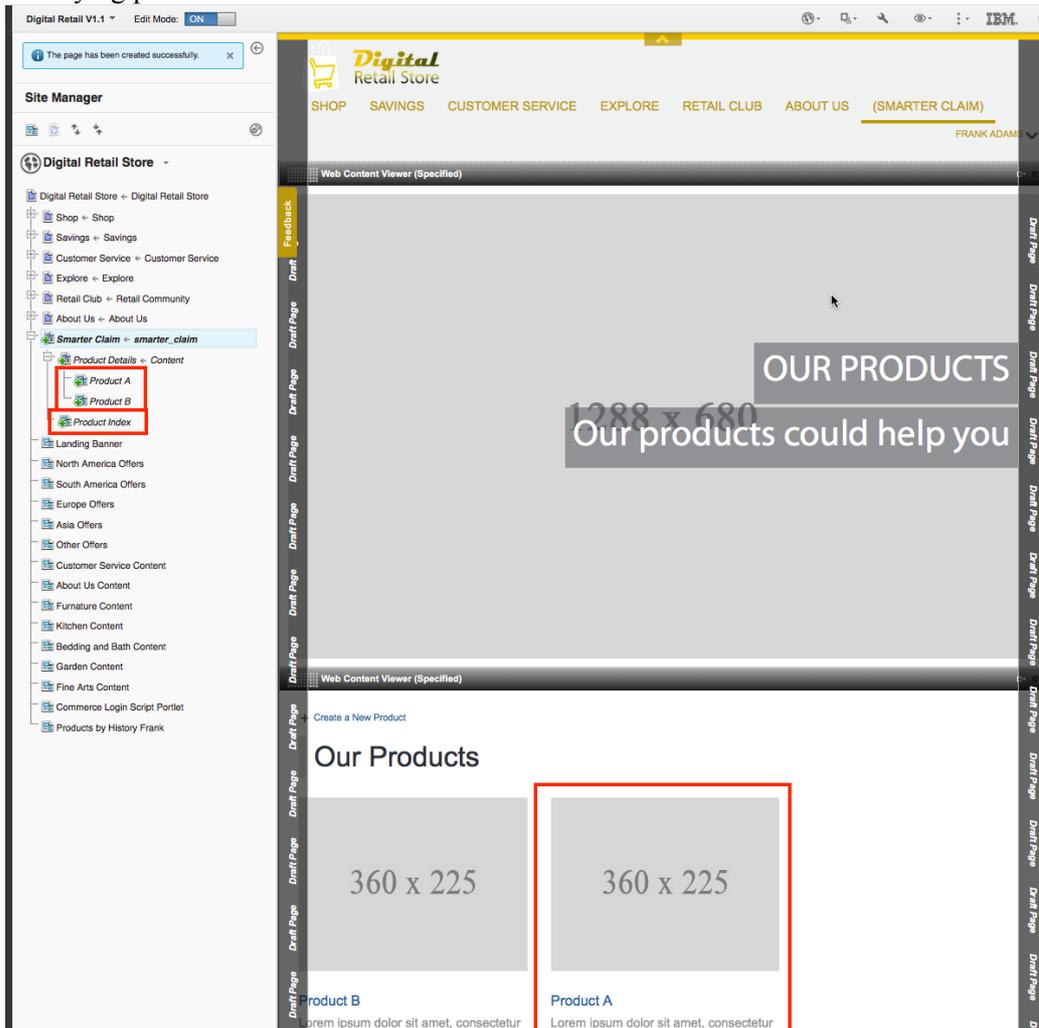
17. Next select **Style**. These are default styles you can choose from to control the look and feel of your page. It is possible to define your own custom styles to match your corporate branding.



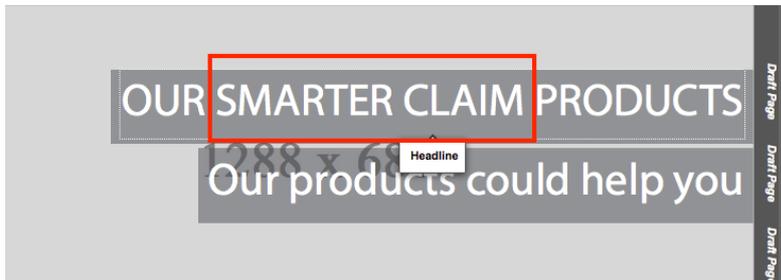
18. Finally, you can assign specific short **Vanity URLs** to your page. Type a unique short/vanity URL name (remember this is on a shared environment), e.g. **SmarterClaiming** in the **Vanity URL Name**. This will allow users to access your page directly using a memorable URL, such as <http://www.digitalretail.com/SmarterClaiming>. Do not save it now and close the Page Settings with



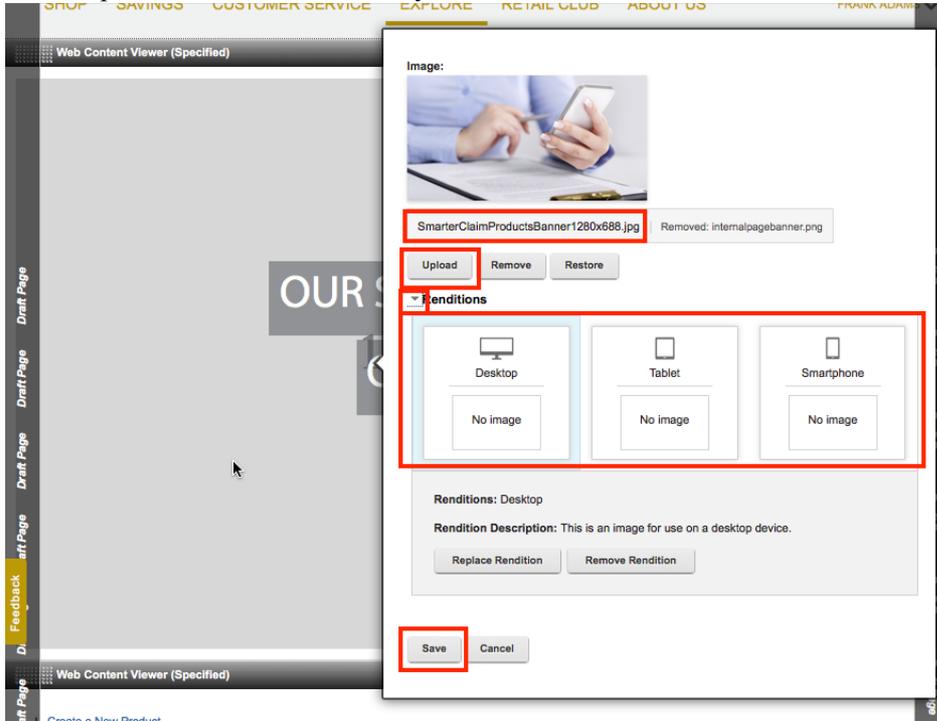
19. Your page is now ready to be populated with relevant content and still in **draft** state. You see the **Smarter Claim** page with the **Product Index** content that manages the banner and configuration of the underlying products index.



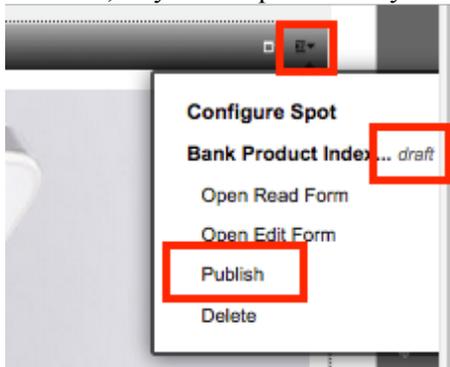
20. Now you will change the headline of this section to Smarter Claim Products. As you can see, in the edit mode it's like working in WYSIWYG, and therefore easy to learn. You are guided in configuring the contents of the page. Click inside the headline and change it to **OUR SMARTER CLAIM PRODUCTS**.



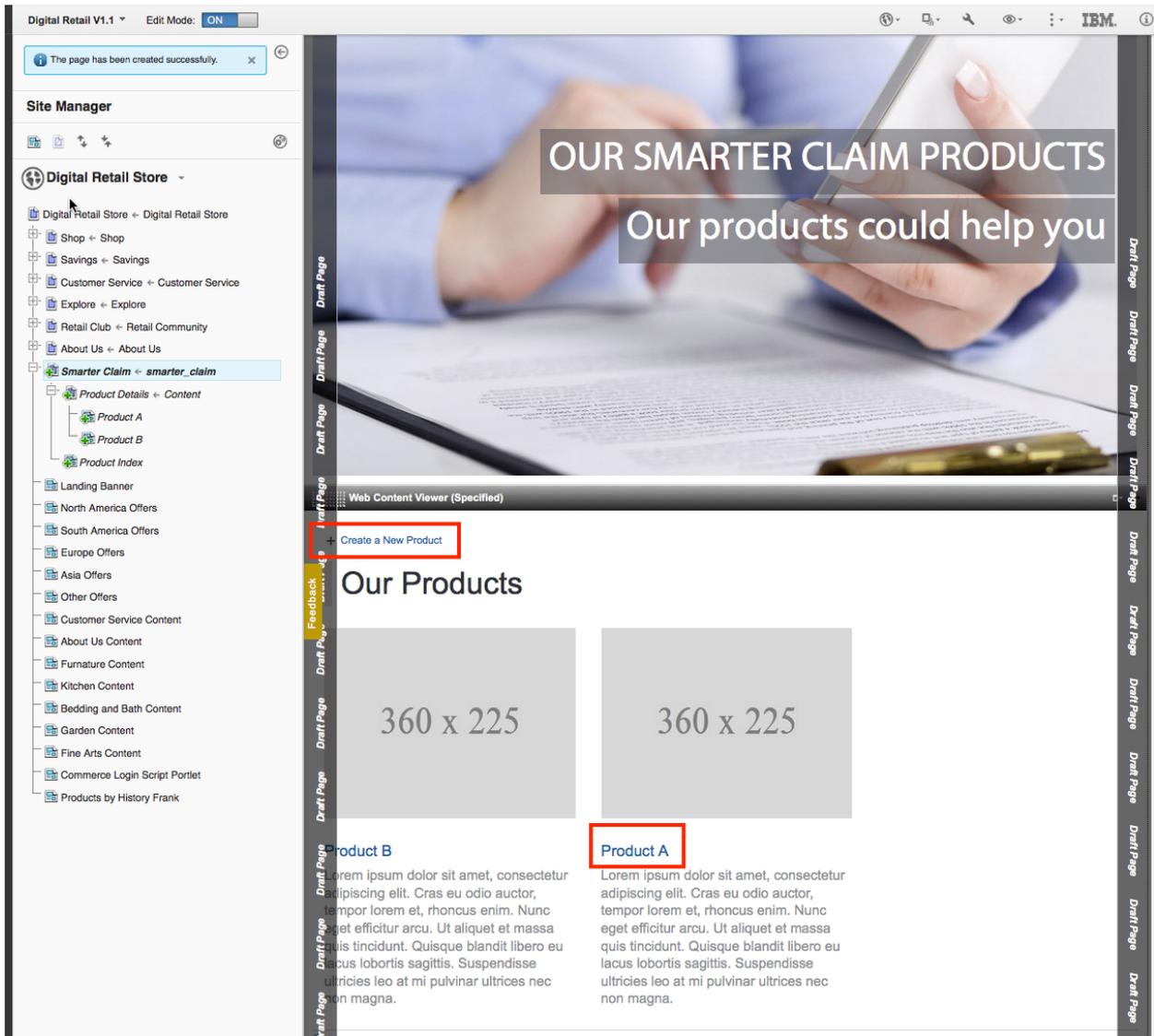
21. You can do the same with the Banner Image. Click inside the image and click **Upload** to select from your **Desktop/Digital Experience Labs/Helper Files/User Tour: SmarterClaimProductsBanner1280x688.jpg** or other photo of the indicated size. Again, you may use free image banks, like <http://morguefile.com> to find good materials. Click **Renditions** to notice you can select multiple renditions for the Desktop, Tablet and Smartphone. Use it now for all the devices, as they will adapt themselves automatically. Click **Save**.



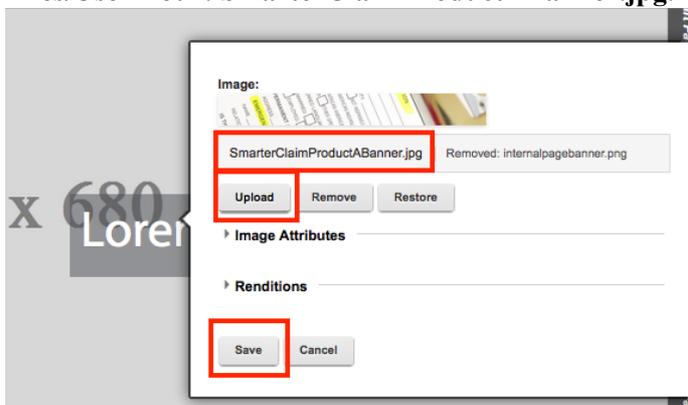
22. You may need to refresh your page (F5) to see the change made. Then you may change the subheading as well. If you want to undo your change, just hit the escape key to quit the field. To publish this or any content, scroll the page to the left, go to the **Content menu** and select **Publish**. You do not have to do this now, as you will publish all your new changes later in this lab. Notice it is currently in draft.



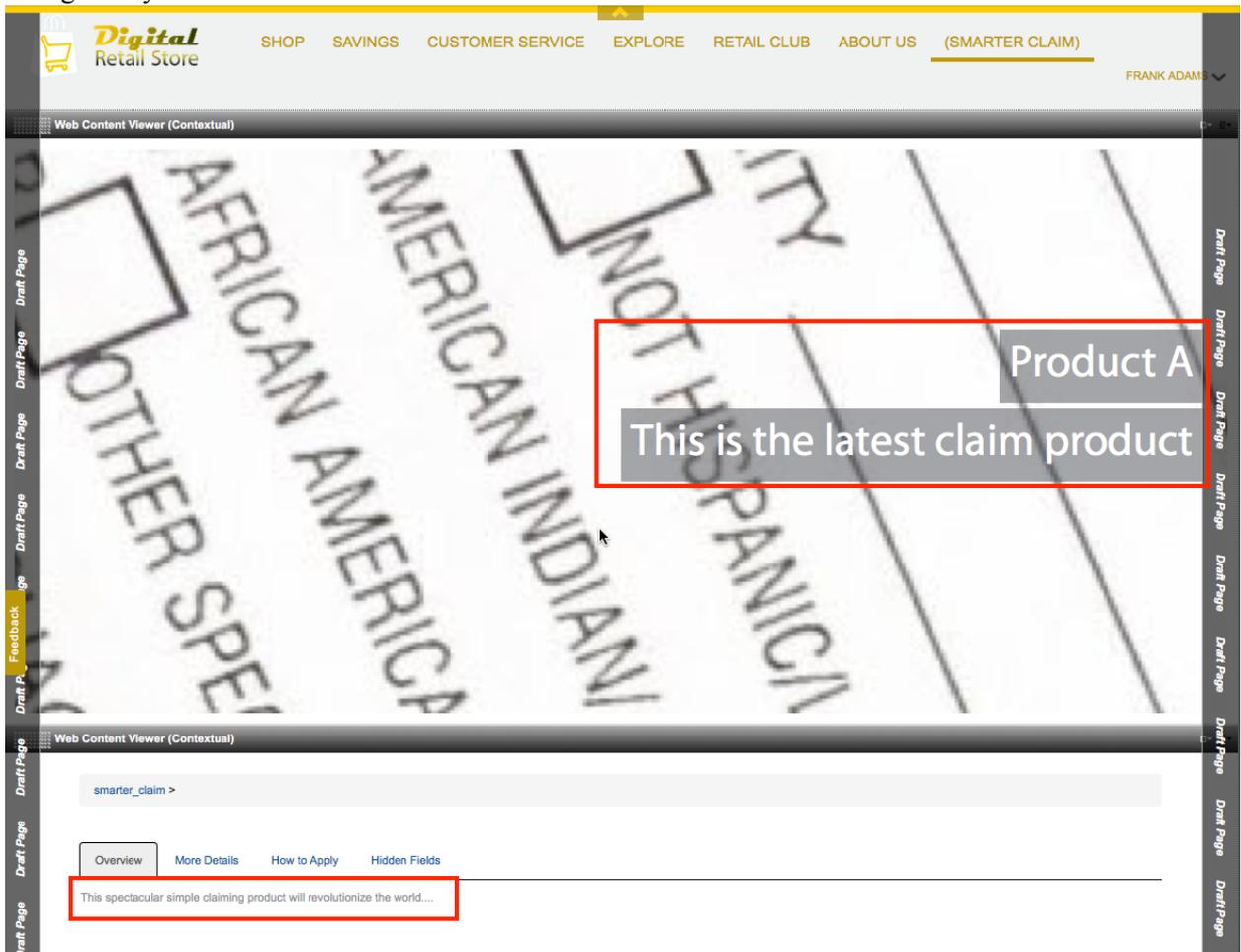
23. Now you will update one of the Smarter Claim products which are currently showing in the list. Notice you can also create new contents in this index with a single click, using **Create a New Product**. Click on **Product A**.



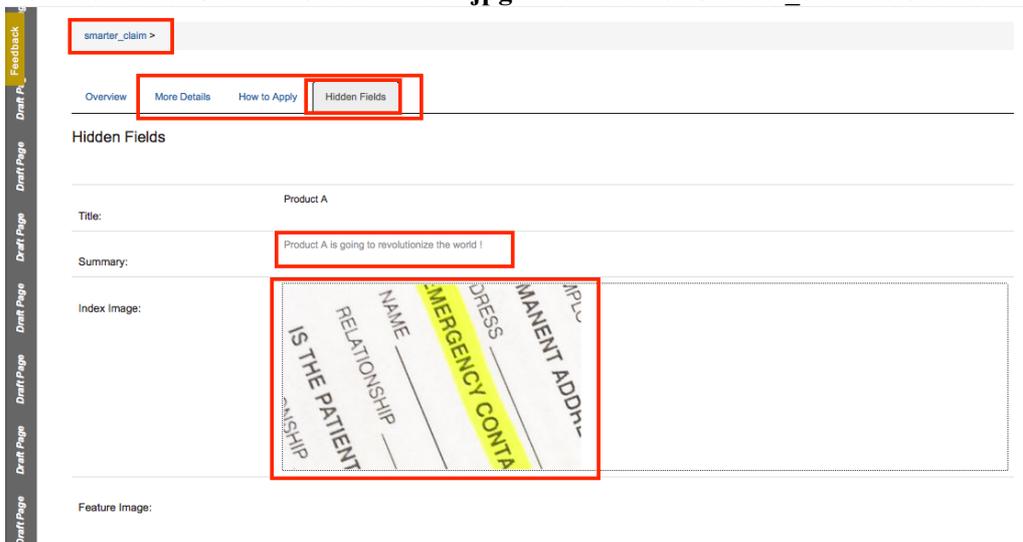
24. This open the details pages which layout is shared between all products, and showing it with the selected product. Start by setting banner image. You may use the **Desktop/Digital Experience Labs/Helper Files/User Tour: SmarterClaimProductABanner.jpg**. Click **Save**.



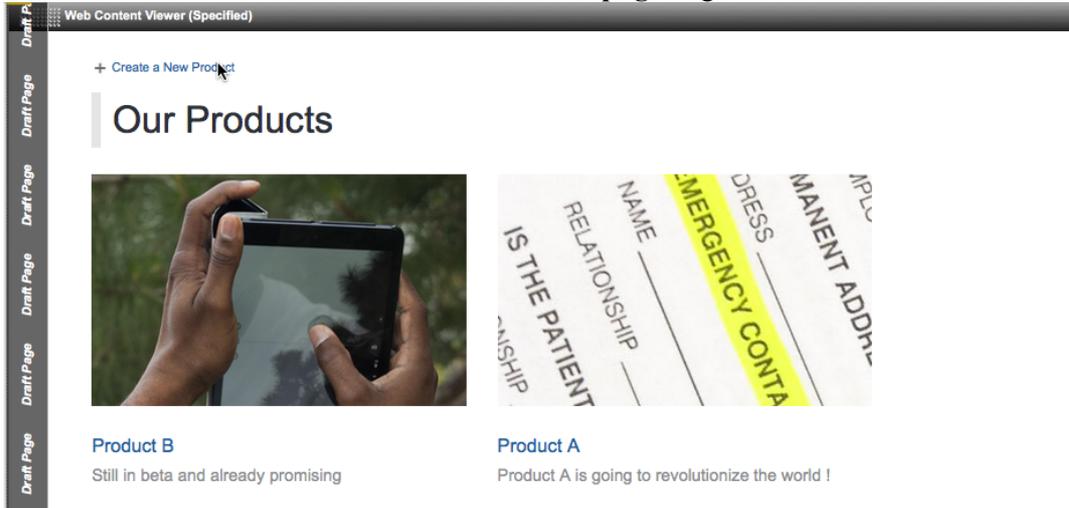
25. Then set the headline (which does not have to be the product name), subheading and more for Product A. You may need to refresh the page to access to these entries. Also, set the Overview rich text entry. Your changes may look as follows:



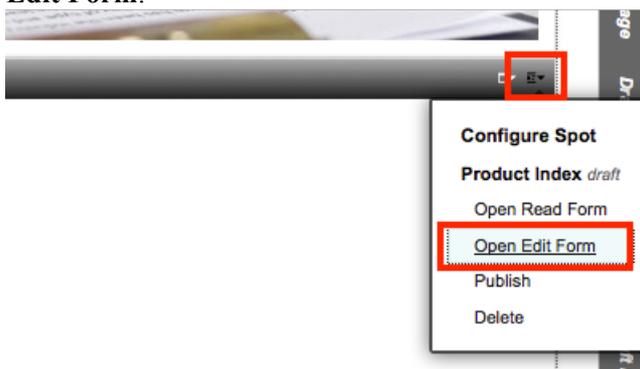
26. You can also enter **More Details** and **How to Apply** and in addition you see some **Hidden Fields**. These are not shown in view mode and allows the contributor to access certain content parts that are shown in other pages. Click **Hidden Fields**. Here you have access to the product name, the summary, index image and feature image that appears in the parent index page. Change summary and Index Image (you may keep the Feature image empty). You may use the **Desktop/Digital Experience Labs/Helper Files/User Tour: SmarterClaimProductAIndex.jpg**. Then click on smarter_claim to back to the parent page.



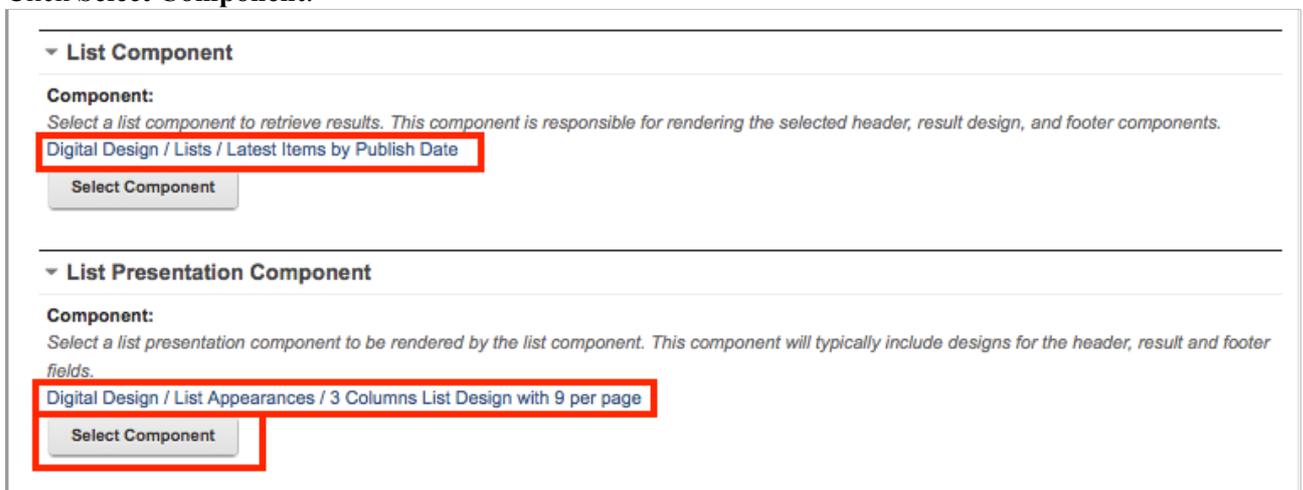
27. You see that Product A is now nicely updated using the Summary and Index Image. If you want, you can now select Product B and update this. You may use the **Desktop/Digital Experience Labs/Helper Files/User Tour: SmarterClaimProductBBanner.png** the **Desktop/Digital Experience Labs/Helper Files/User Tour: SmarterClaimProductBIndex.png** images.



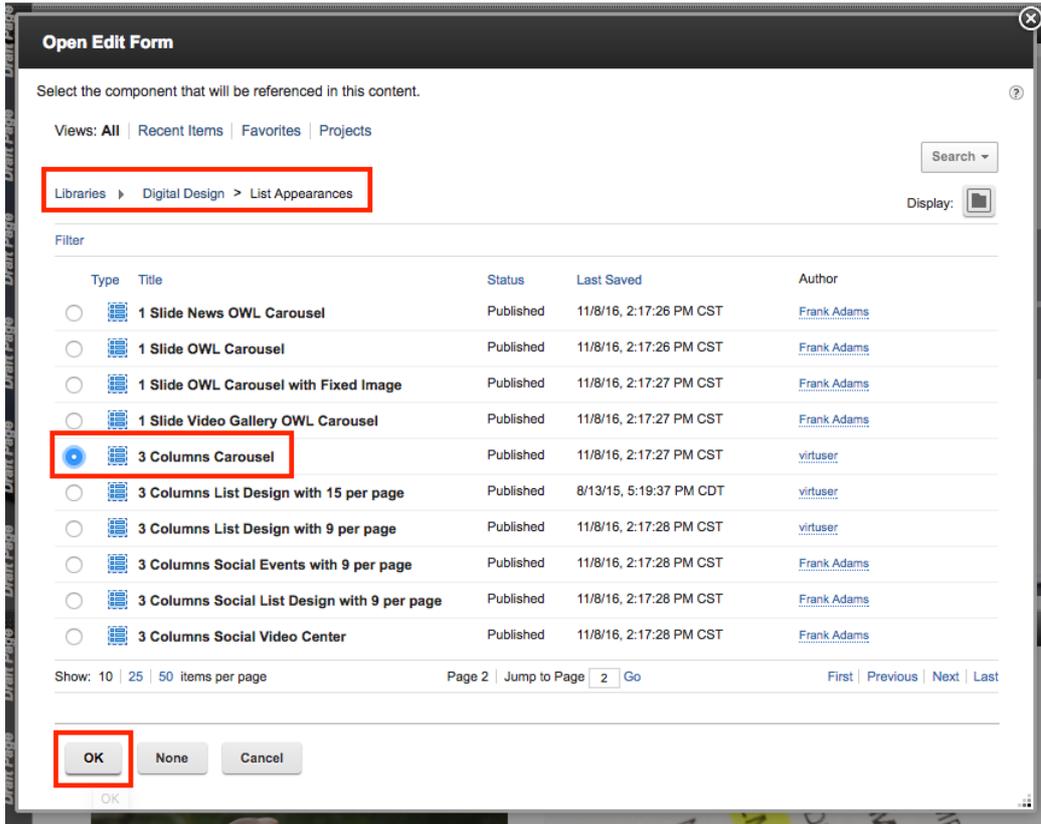
28. As a business user, you can change the appearance of this list. Your designer decides how this can be done. The options may appear as additional hidden values. In this case, they want you to configure it as follows. Scroll the page to the right, if needed, and click on the **Display content menu** and then **Open Edit Form**.



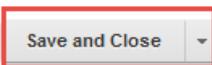
29. Here you see all the details on your index content. It shows for example the List Component, used to select the right list items, and a specific List Presentation Component, used to define how this list should display. You will change this from **3 Columns List Design with 9 per page** to **3 Columns Carousel**. Click **Select Component**.



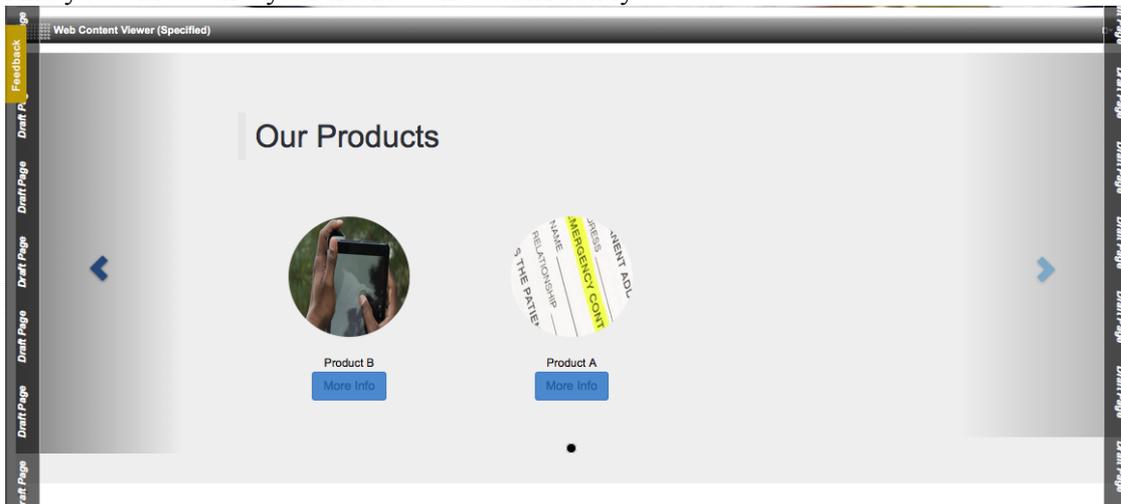
30. Now find and select the **3 Columns Carousel** and click **OK**.



31. Scroll down (notice other configuration options) and click **Save and Close**.



32. And you will see that your list now shows differently.

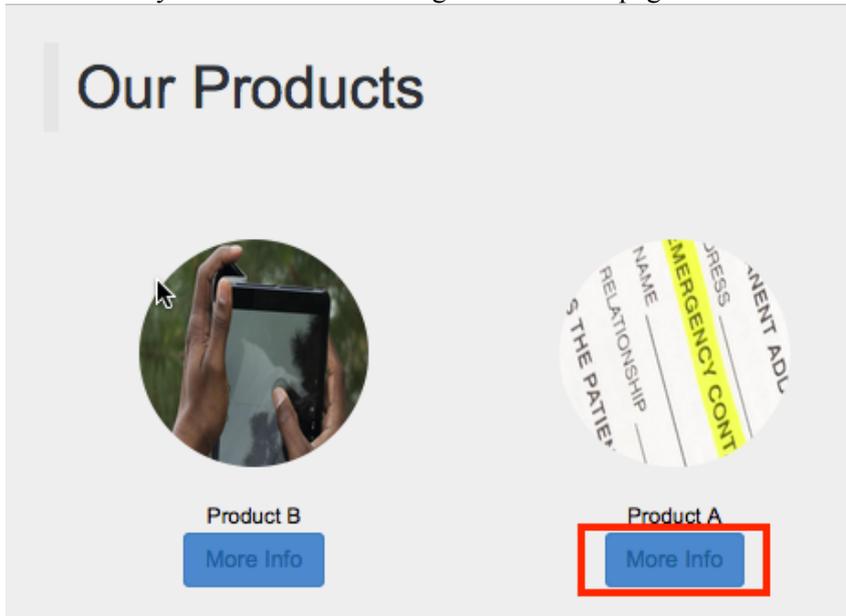


You have successfully created additional Smarter Claim Product pages with specific content and components.

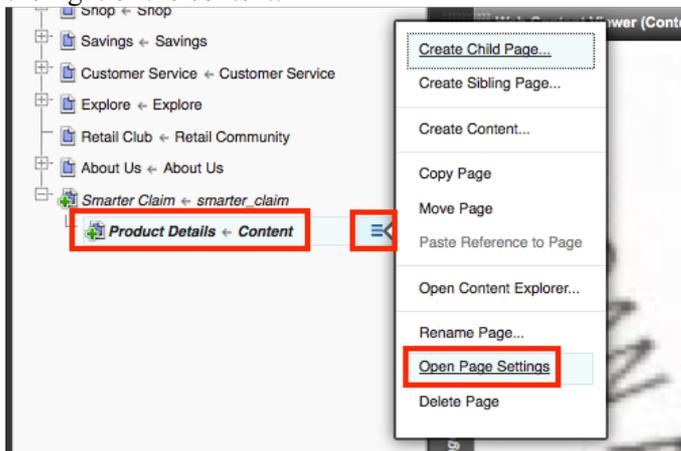
Step 4 Build, Add, Test and Analyze Results of a Vote Smarter Claim Products Form

In this section, you will create and add a **Vote for Smarter Claim Products form** to your Smarter Claim product details page. IBM Digital Experience has a forms component (IBM Forms Experience Builder) which provides business users access to an easy tool to create and manage dynamic forms. Once configured, you will test the form and go to the back-office to review its responses.

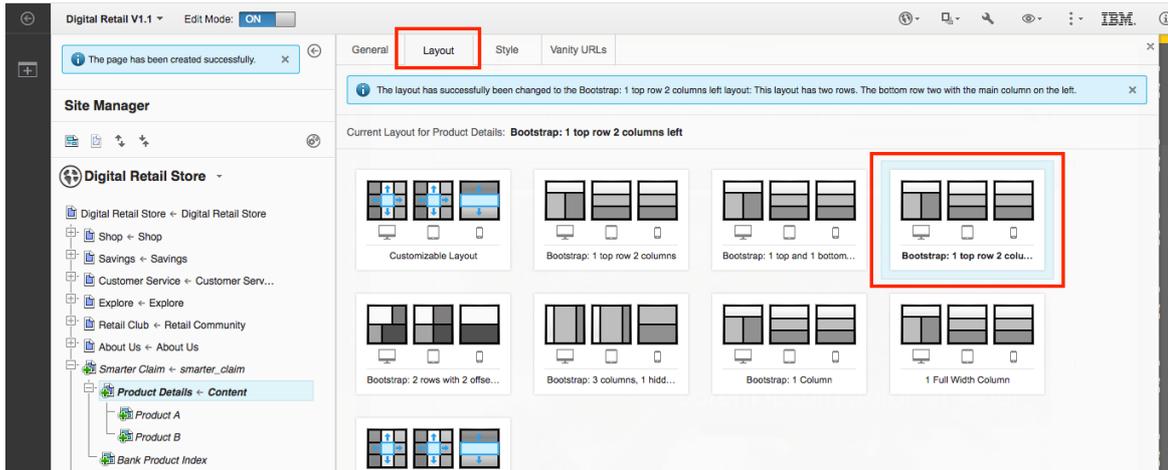
1. First you will add a Forms Experience Builder portlet to the Product Details page. Select the **More Info** link on your new Product A to go to its details page.



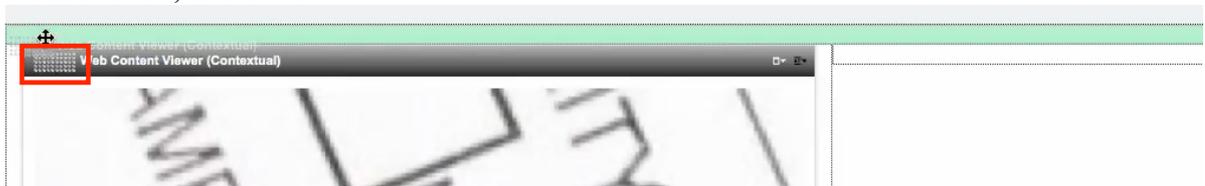
2. This page has now a single column layout. You need to change this to have space to add the form to the right of the content.



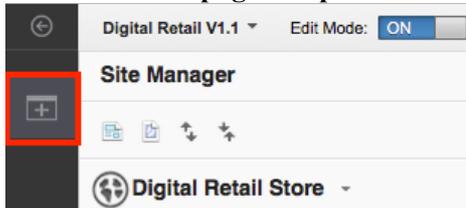
- 3. Go to **Layout** and select the **Bootstrap: 1 top row 2 columns left** layout as shown and close the Page Settings:



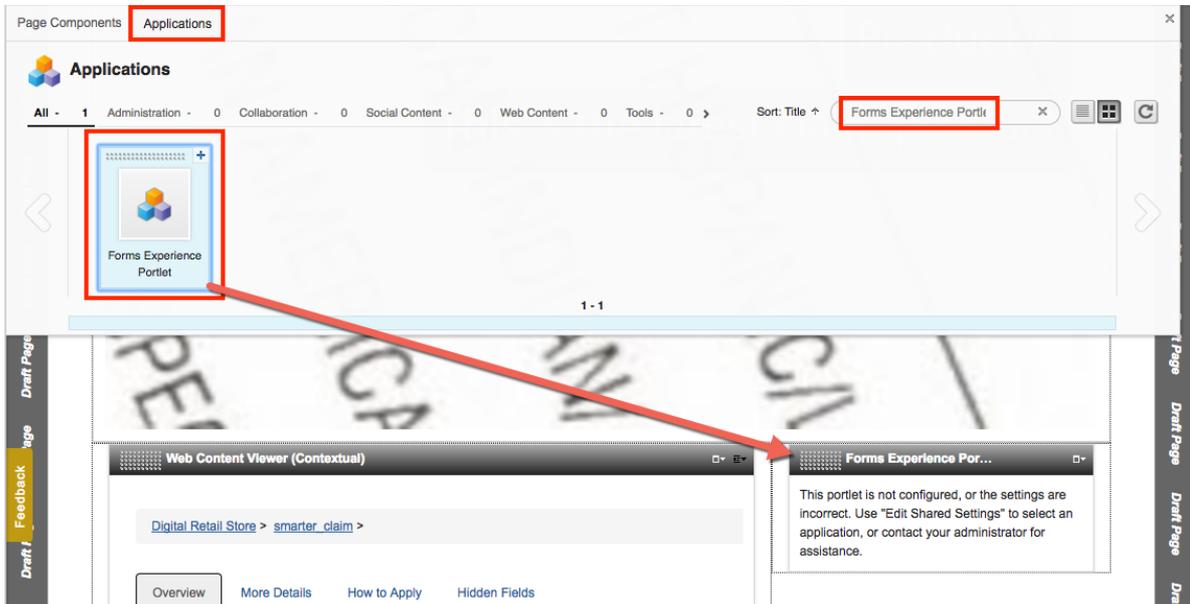
- 4. Now you need to move the banner up to the full width cell. Select the portlet and drag and drop it on the above row, as shown.



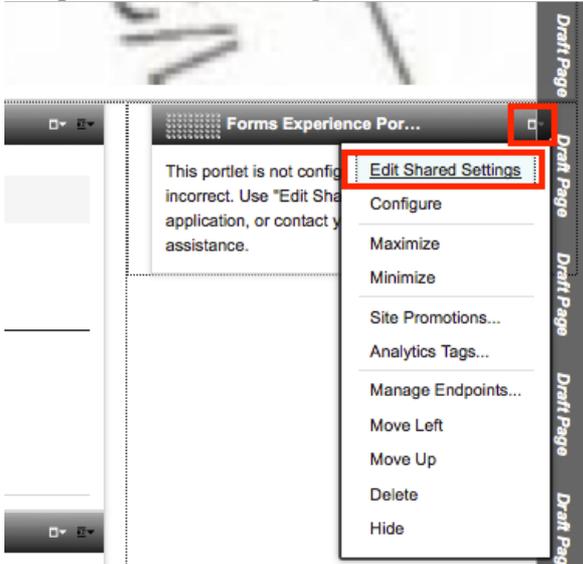
- 5. Then click **Add page components and applications**.



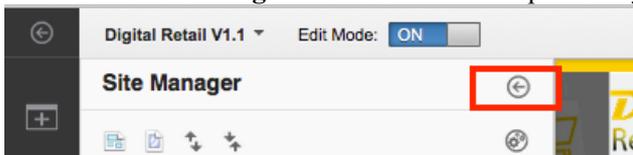
6. Select **Applications** and type **forms** as the search string in the search box and observe search results. You should see **Forms Experience Portlet** application name listed in the returned results. Your IT department may preconfigure this and give it simple names, like Survey form. Click on the + sign to add the **Forms Experience Portlet** to your page or select it and drag and drop it directly to the right place (ensure your browser is wide enough to show the two columns).



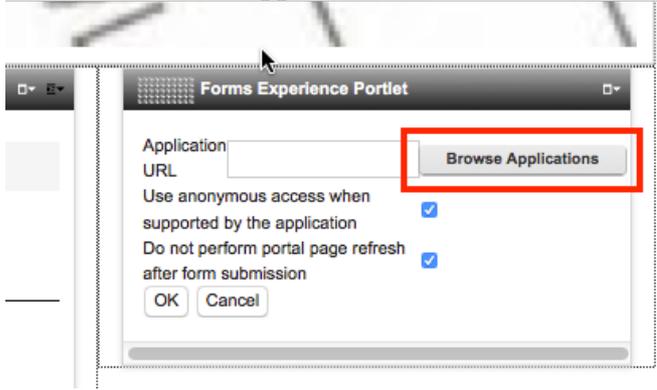
7. Now you are ready to configure it. Select the portlet option **Edit Shared Settings**. Notice the other options, like **Site Promotions** and **Analytics Tags** that are to increase visibility, and **Manage Endpoints**, used to make portlets communicate to each other.



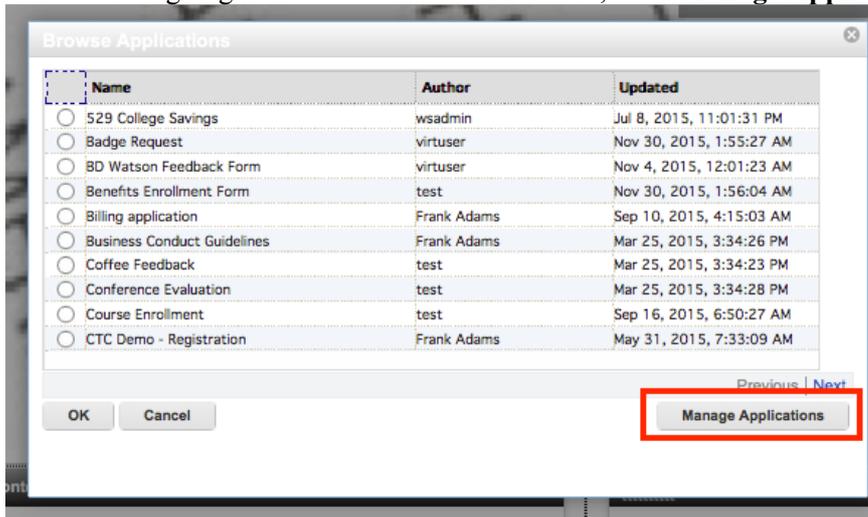
8. Close the **Site Manager** first to have more space for your page.



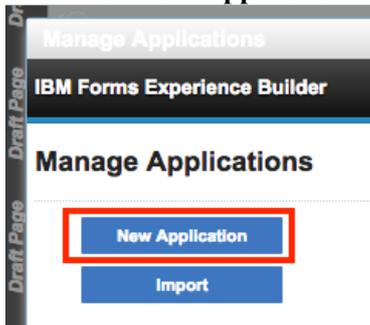
9. Then click **Browse Applications** to select and of the ready to use forms.



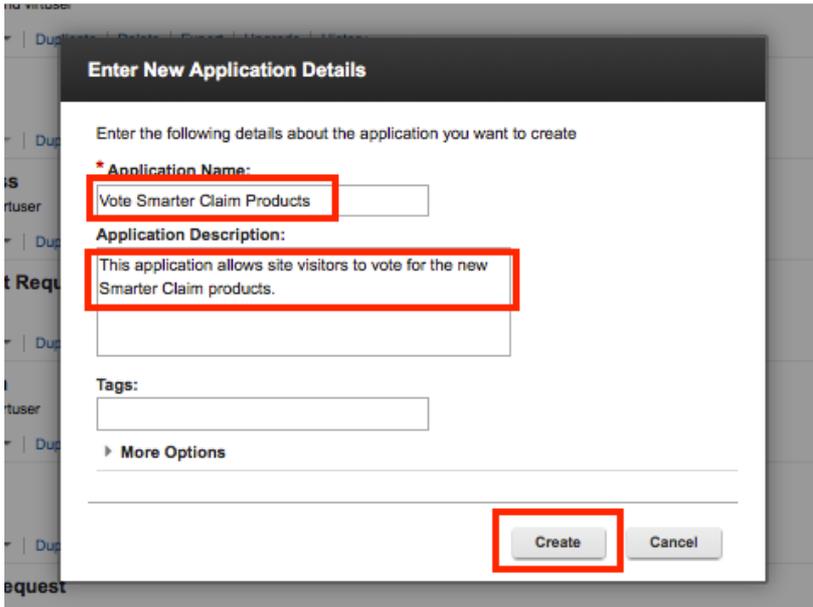
10. As you can see, many forms are ready to reuse and after this lab, you may take a closer look at them. You are now going to create a new one. Therefore, click **Manage Applications**.



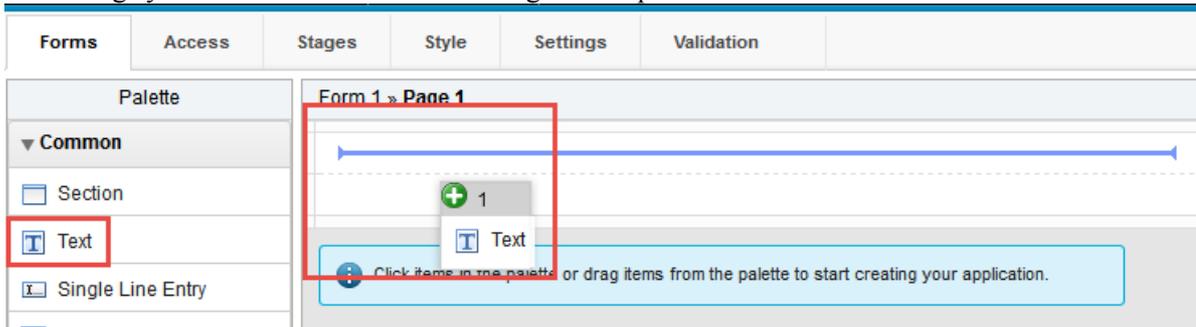
11. Then click **New Application**.



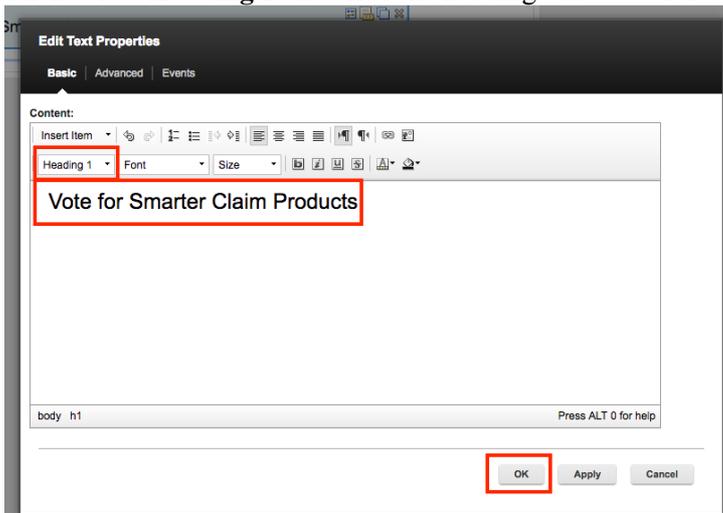
- 12. Then enter a unique application name (remember this is on a shared environment – you may prefix the name with the short name of your site), e.g. **Vote Smarter Products** and optional description. Then click **Create**.



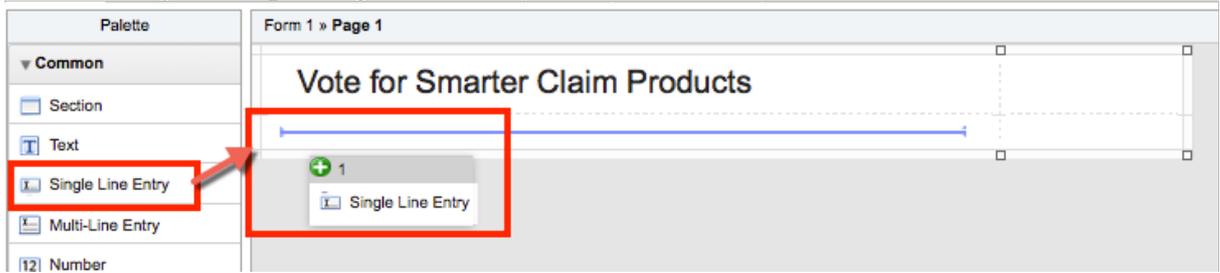
- 13. This brings you to the form editor. First drag and drop a **Text** element to the first row.



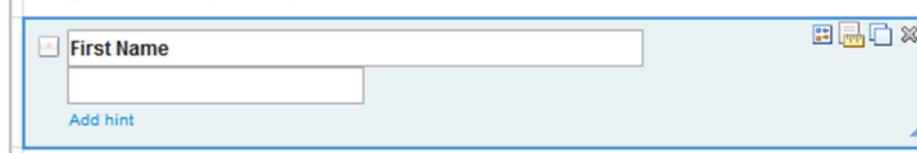
- 14. Then select **Heading 1** and enter the heading text **Vote for Smarter Claim Products**. Then click **OK**.



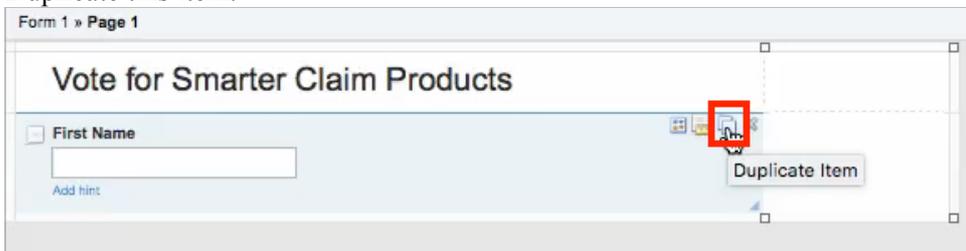
15. Below it, drag and drop a **Single Line Entry**.



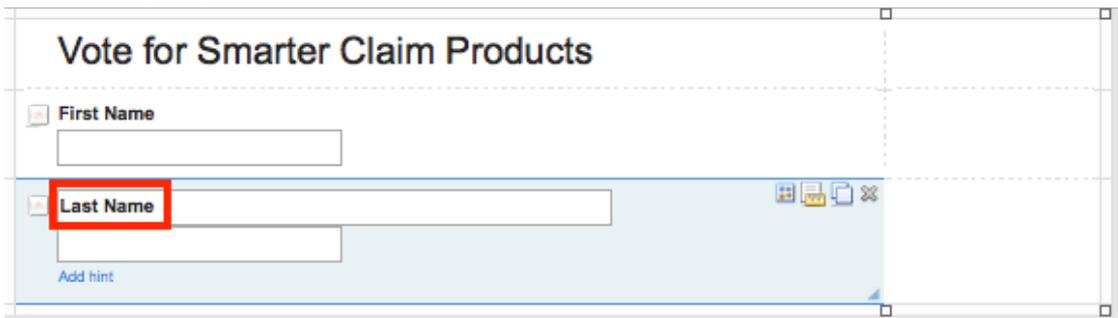
16. Change its description by **First Name**.



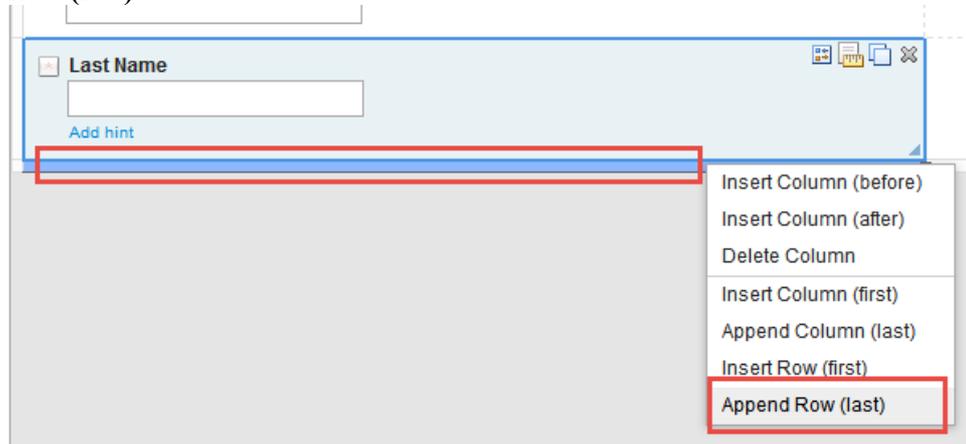
17. Duplicate this item.



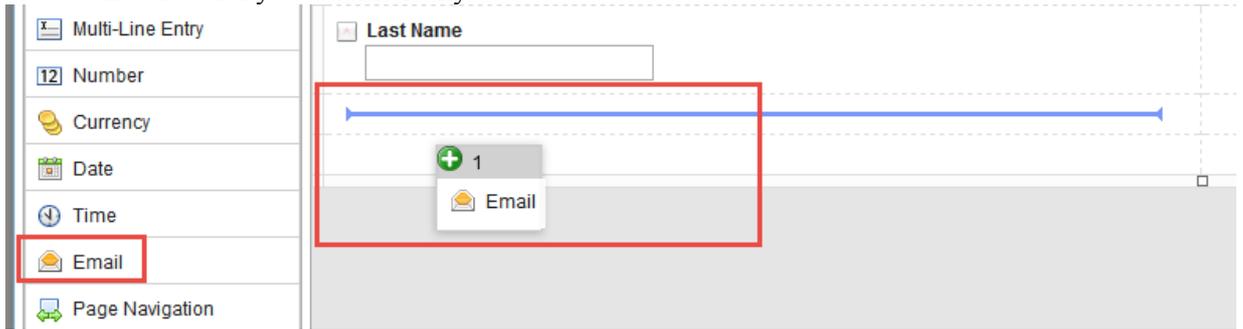
18. Rename it to **Last Name**.



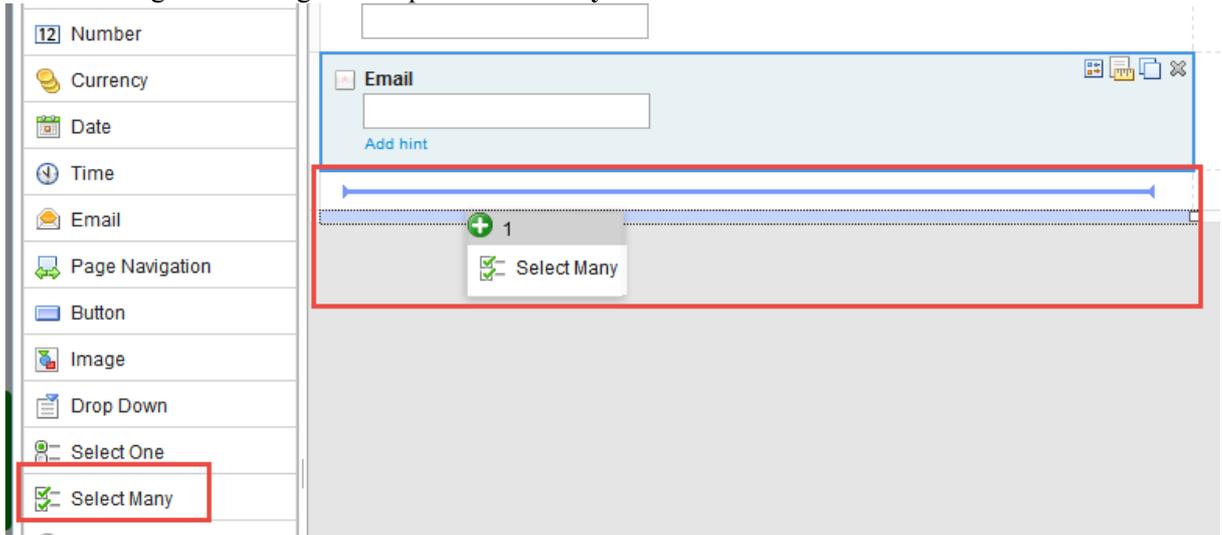
19. Now add a row below the table. Click on the last row and you can select table options. Select **Append Row (last)**.



- 20. Now drag and drop an e-mail field below. You may also drag it just below the previous row and it will create a new row for you automatically.



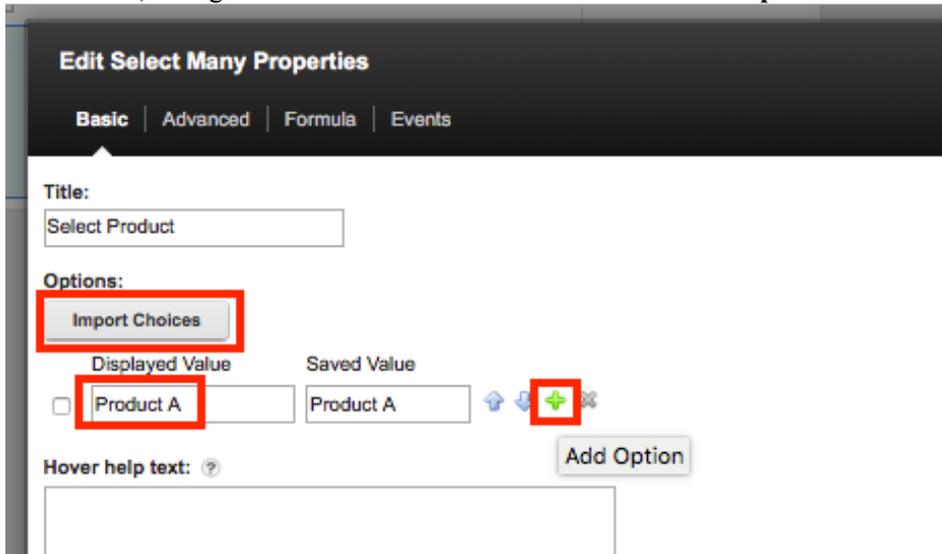
- 21. Add a row again and drag and drop a **Select Many** field.



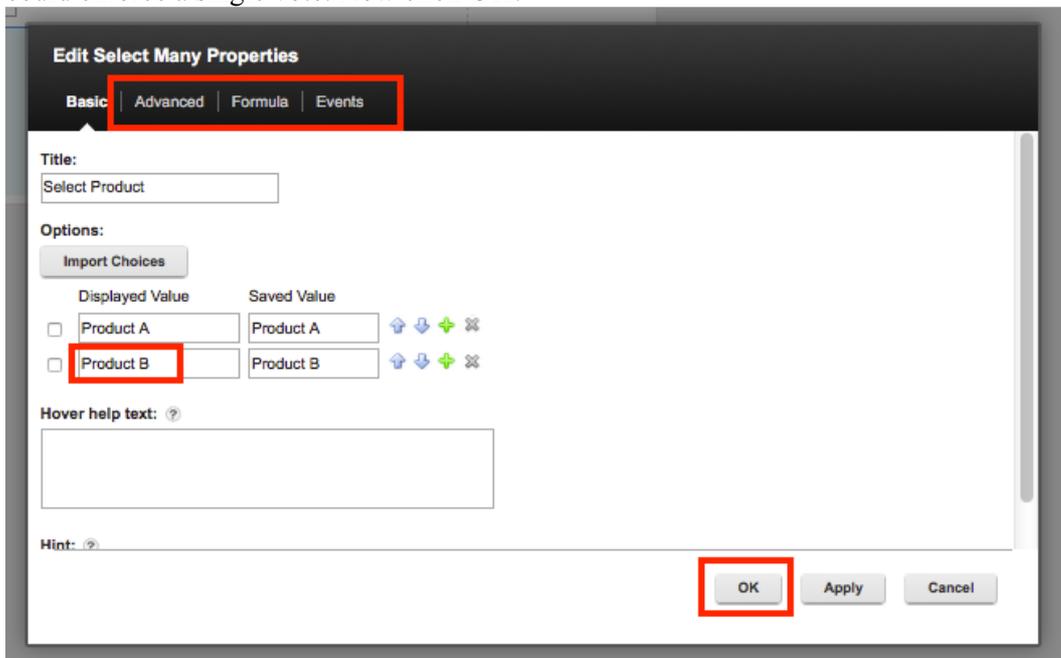
- 22. Each of these fields can be configured in more details. Change the name of the Select Many to **Select Event** and then click **Edit Selection Properties**.



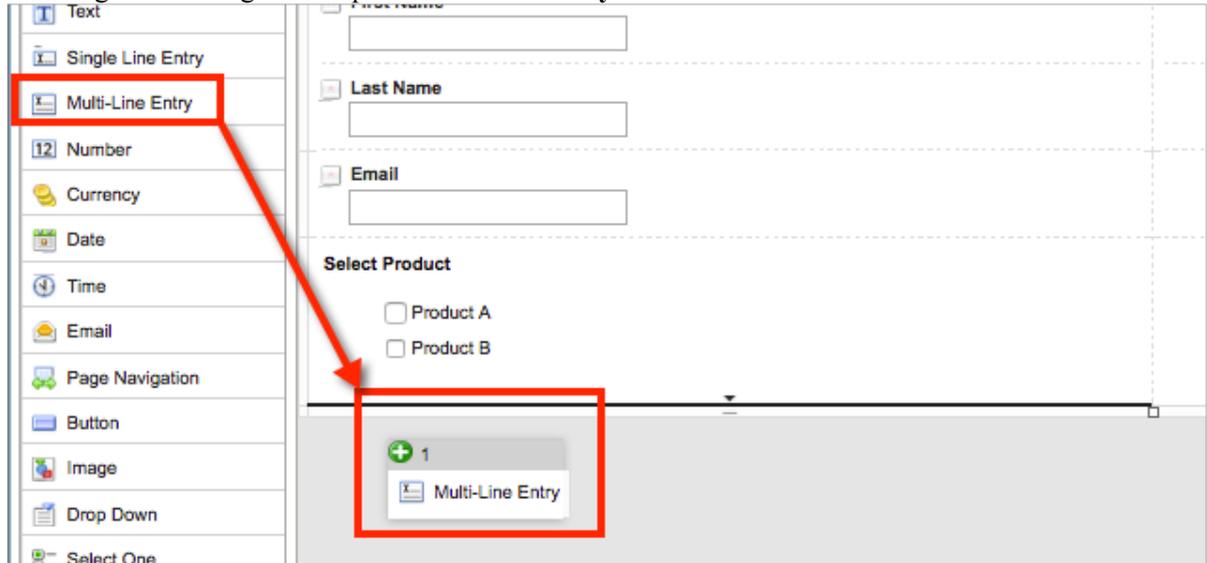
- 23. In the basic tab, you can set the select options. You can import them if you have a list of them already. In this case, change the first one to **Product A** and click **Add Option**.



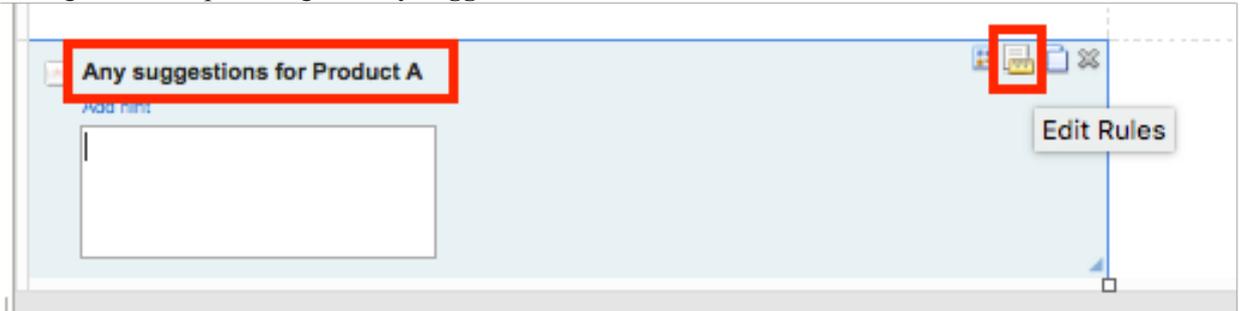
- 24. Now add **Product B**. Notice you have additional tabs to better control this field. For example, you could enforce a single vote. Now click **OK**.



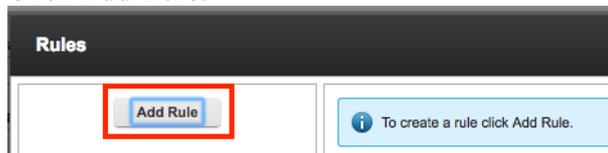
- 25. If the visitor is selecting Product A, you want him/her to provide any suggestions for it. Therefore, add a row again and drag and drop a **Multi-Line Entry** on it.



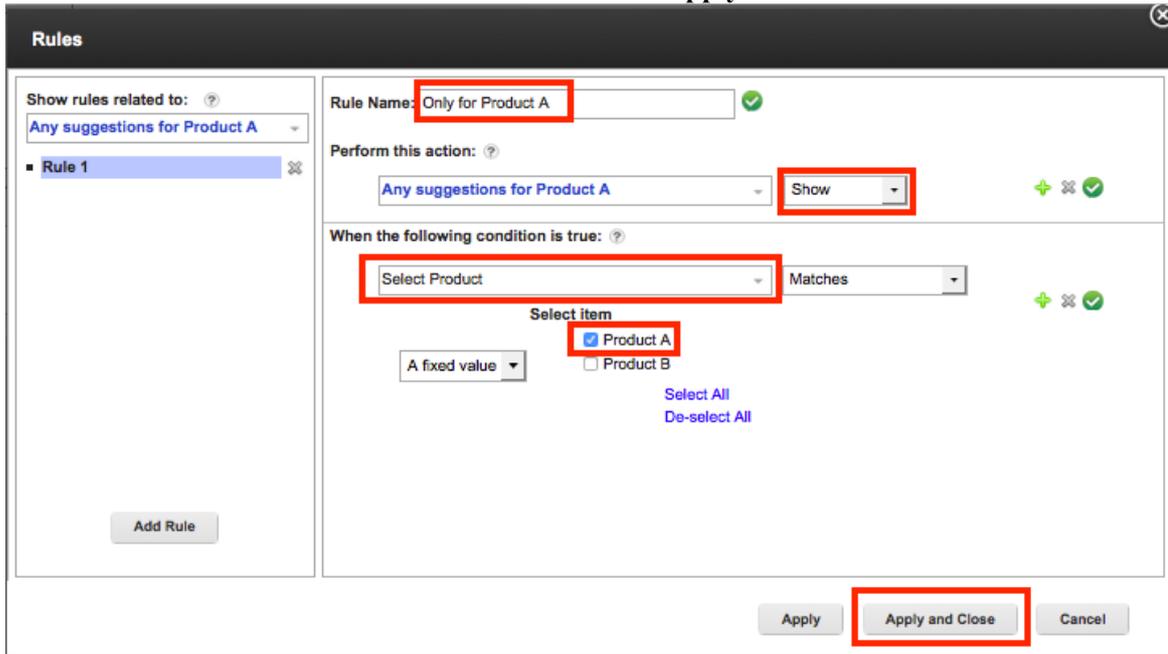
- 26. Change its description, e.g. to **Any suggestions for Product A** and then click **Edit Rules** as shown.



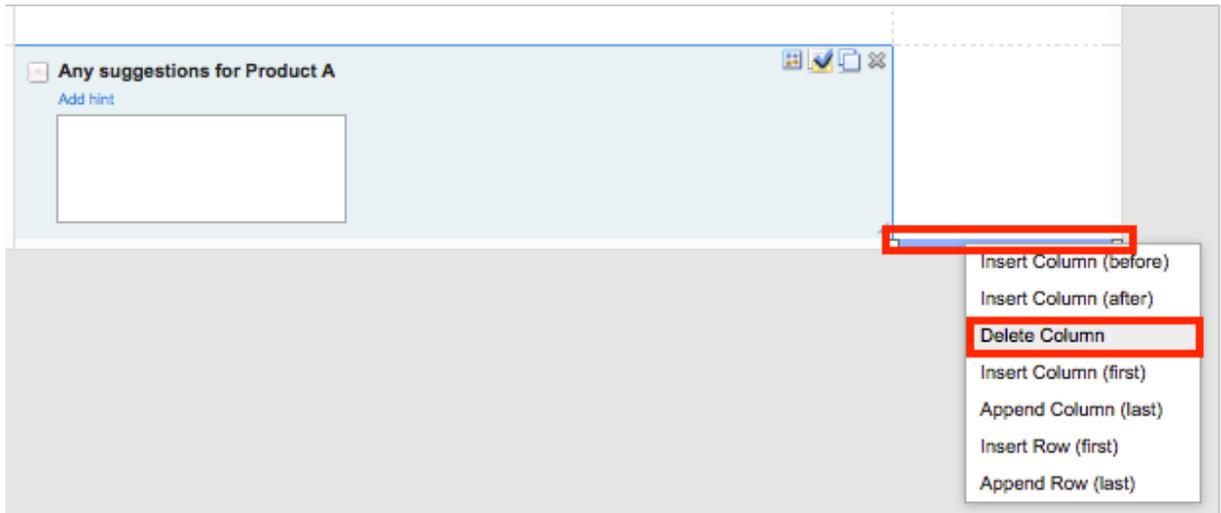
- 27. Click **Add Rule**.



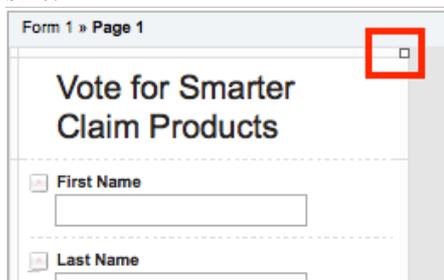
- __28. Enter the rule name **Only for Product A**, change the action to **Show**, change the condition to **Select Product A** and select **Product A** as shown. Then click **Apply and Close**:



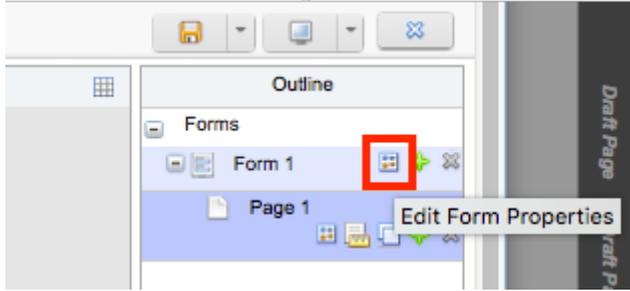
- __29. As you are only using the first column, delete the second. Click on below the table and then **Delete Column**.



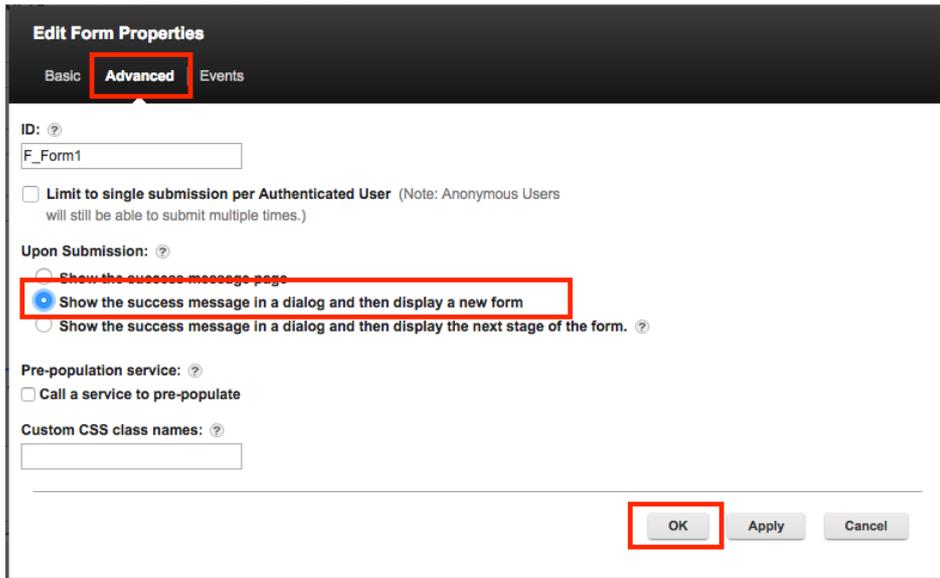
- __30. You may also make the column a bit smaller. Click on the corner and drag it to the left to reduce the size.



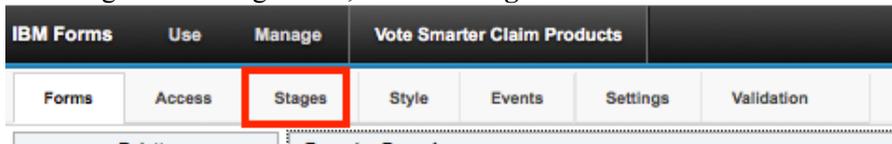
- __31. Finally, configure your form to show a confirmation of your submission in a dialog and then clear the form. Edit the **Form Properties**.



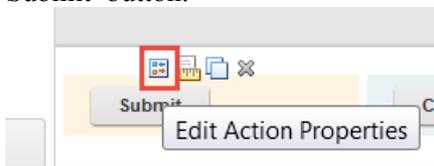
- __32. Then click **Advanced** and select the option **Show the success message in a dialog and then display a new form**. Then click **OK**.



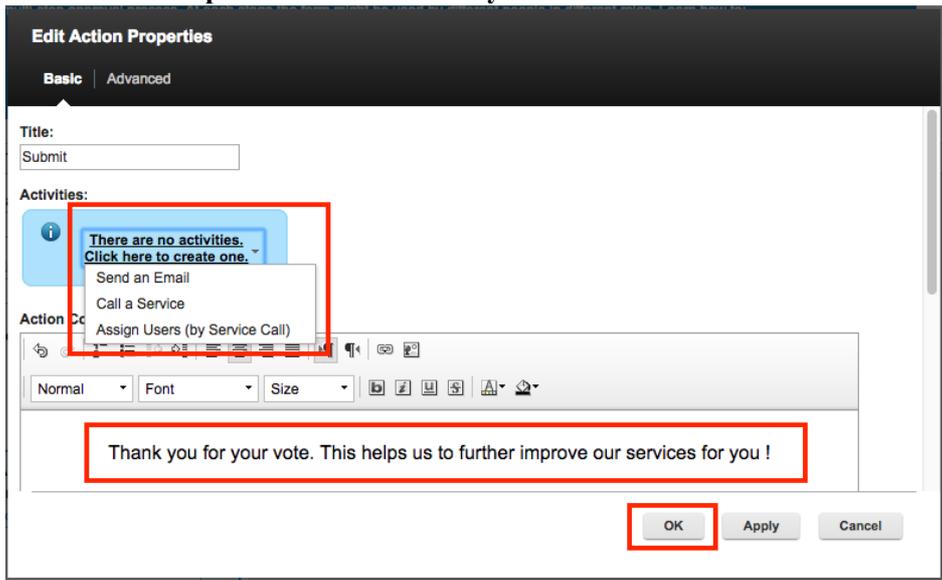
- __33. To change the message itself, click on **Stages**.



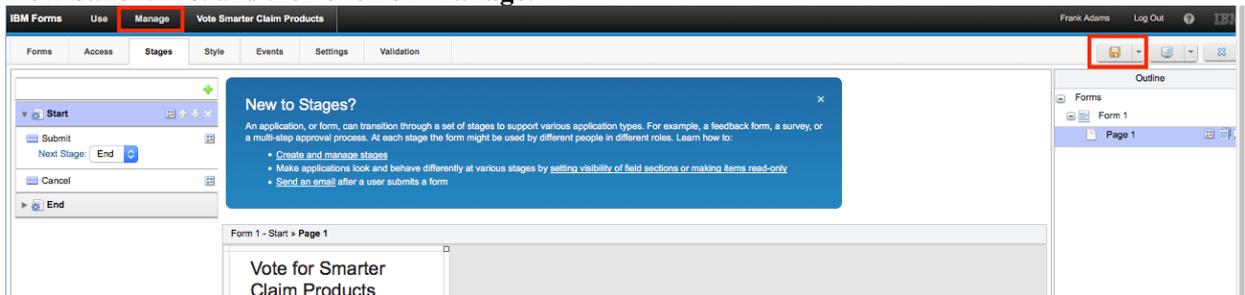
- __34. Here you manage multistage workflows. Below the page click the **Edit Action Properties** of the Submit button.



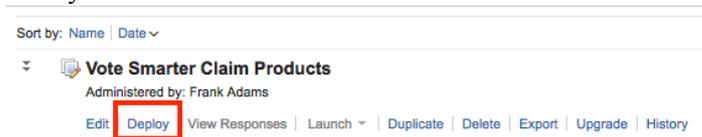
35. You may change the message and perform activities, like sending an email to a specific person or group, or calling a service. Change the description only, e.g. to **Thank you for your vote. This helps us to further improve our services for you!** and click **OK**.



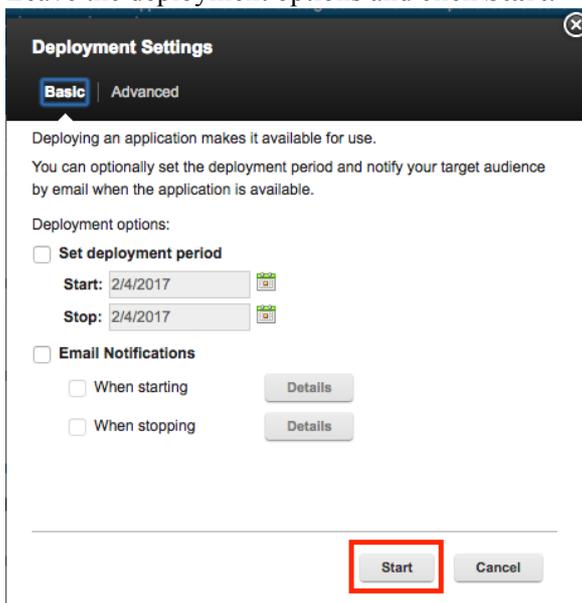
36. Now **Save** it first and then click on **Manage**.



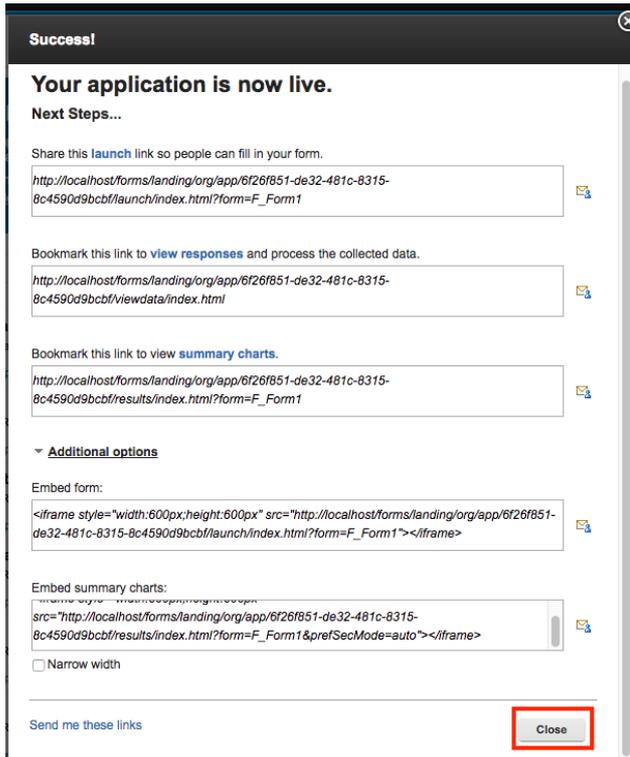
37. Find your new **Vote Smarter Claim Products** form and click **Deploy** so you can use it.



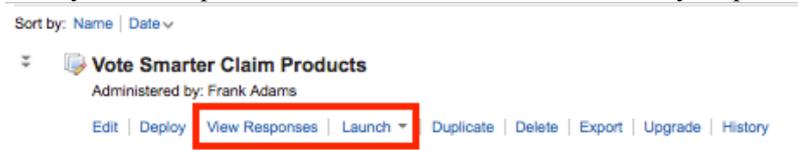
38. Leave the deployment options and click **Start**.



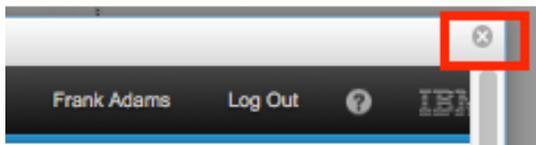
39. You see the notification that your application is now live, with all URLs to access. You may reuse the forms and their results in other places as well. Note that in this case, the host needs to be updated. Click **Close**.



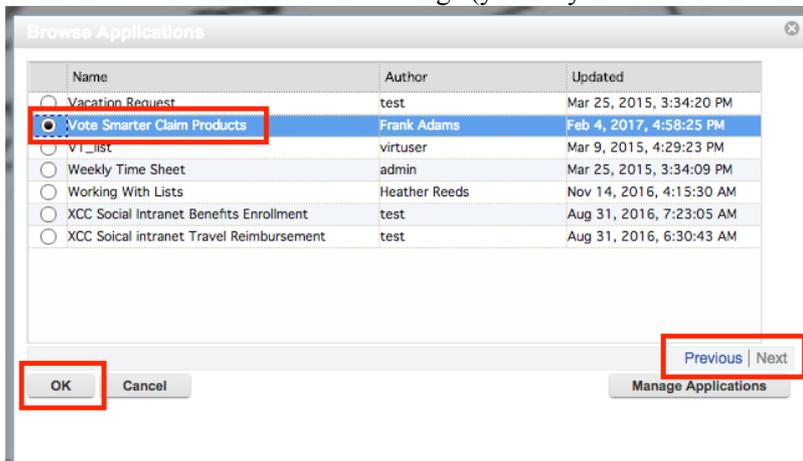
40. Now you have options to launch it standalone and see any responses to it.



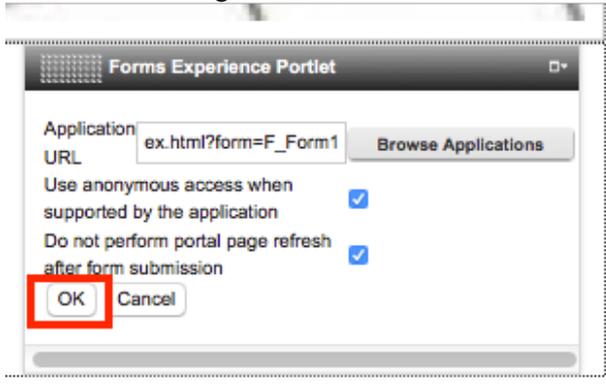
41. Now **Close** the window.



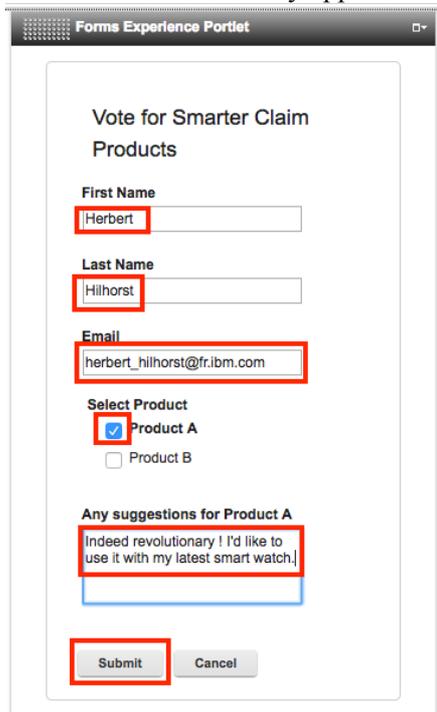
42. This brings you back to the applications browser. Select your new **Vote Smarter Claim Products** form and click **OK** to save the settings (you may need the Next and Previous actions to find it).



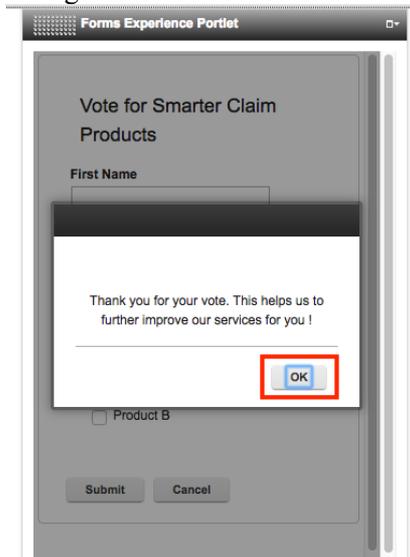
43. Then select **OK** again.



44. Then fill out the **Vote for Smarter Claim Products** form. Notice that the additional **Any suggestions for Product A** field only appears when you select the **Product A**. Click **Submit**.

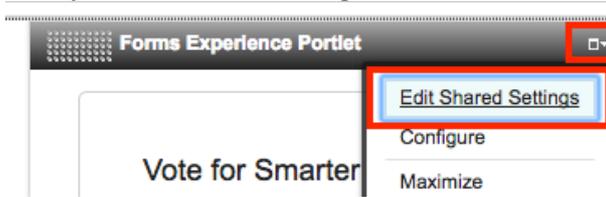


45. You get a confirmation of successful submission. Click **OK** to get back to the page.



__46. Submit at least one more form using different names and options.

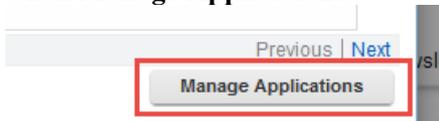
__47. Now you will review the responses. Select **Edit Shared Settings** again.



__48. Click **Browse Applications**.

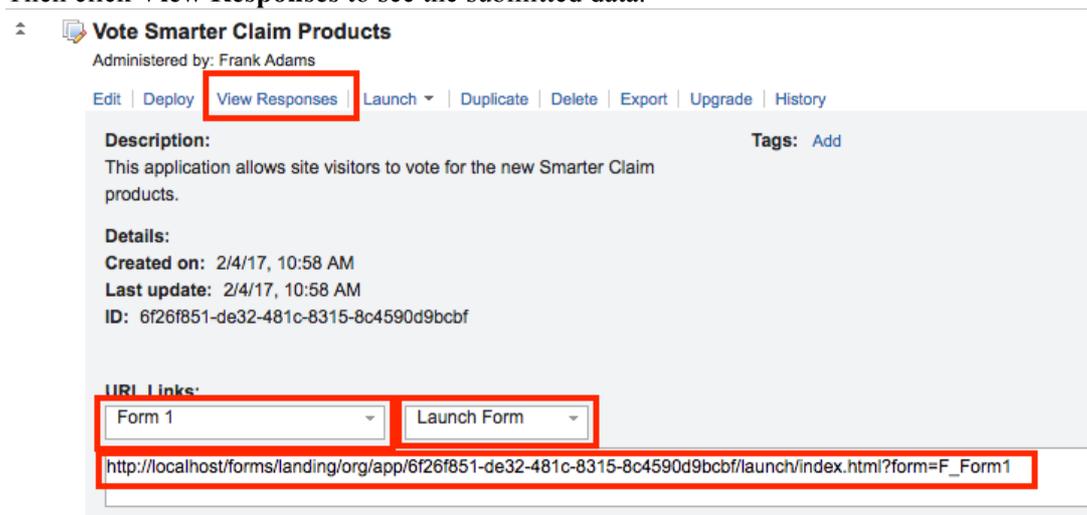


__49. Click **Manage Applications**.

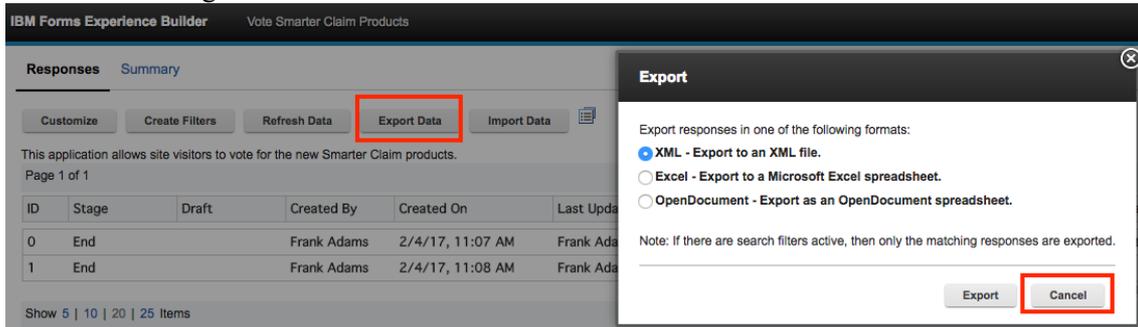


__50. Note: if you wish, you may open the Forms administration interface directly in a dedicated browser window. This may be the current host (if it is installed on the same server) with /forms, eg.: <http://dx.ibmcollabcloud.com/forms>. This opens the same content as normally using the Manage Applications directly in the FEB portlet. You may also use **CTRL +** and **CTRL -** to control the size of your browser screen.

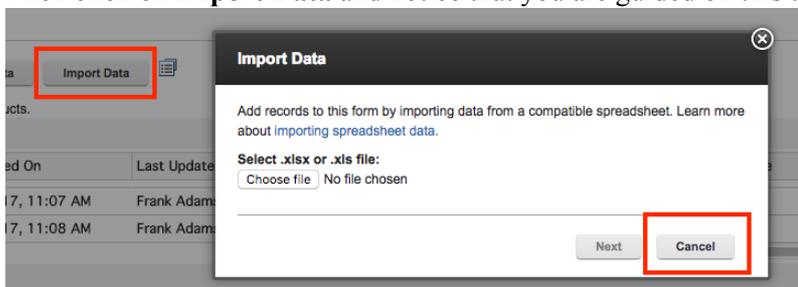
Look for the **Vote Smarter Claim Products** in the list of forms, click on it to expand. This shows you options to find for each form page in your application the direct launch form, view responses and summary charts URL which you may use and insert in a different page component (in this case you would need to change localhost in the URL below with the right host, e.g. dx.ibmcollabcloud.com). Then click **View Responses** to see the submitted data.



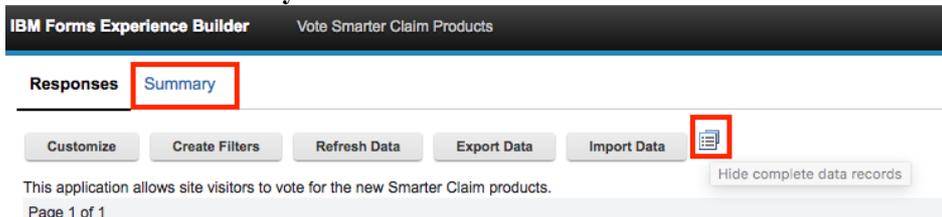
51. This opens a new page with a list of all the responses. You can select any of them to see its details. This analysis information can also be included directly on a page, dedicated to the products or vote responsible. You can also access this data using REST API in other applications and you can simply export it. You can import and export data. Click on **Export Data** and you see the formats supported. Click **Cancel** to go back.



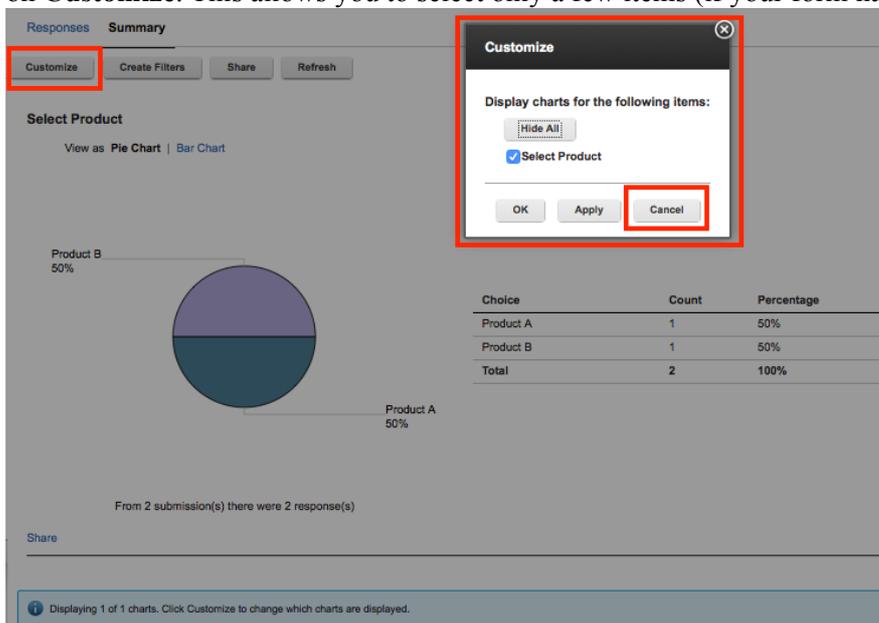
52. Then click on **Export Data** and notice that you are guided on this task. Click **Cancel**.



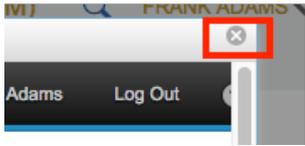
53. Notice also that you can hide complete records and easily find the ones that need special attention. Now click on **Summary**.



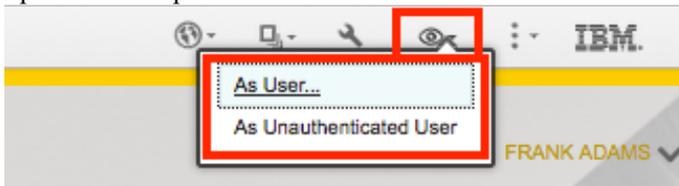
54. This shows the summary page of all responses. You can customize it, create filters and share it. Click on **Customize**. This allows you to select only a few items (if your form had more). Click **Cancel**.



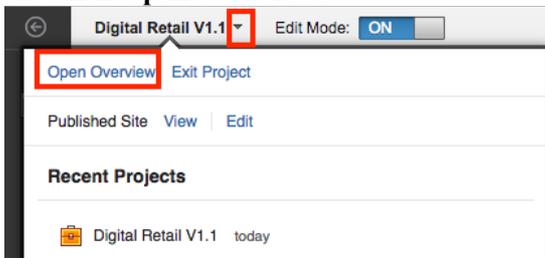
- __55. Optionally have a closer look to the **Create Filters** and **Share** options as well. **Close** this window to come page to your **Product Details** page, click **OK** to close the configuration window too and click **OK**.



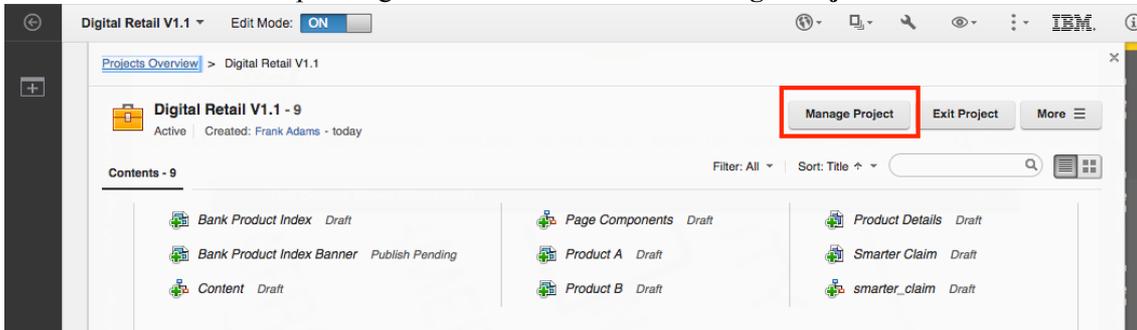
- __56. Now you want to publish your changes so they are visible on the live site for all visitors to see. If you want, you could preview how it will look for specific and anonymous users, by using one of the options in the preview Menu as shown.



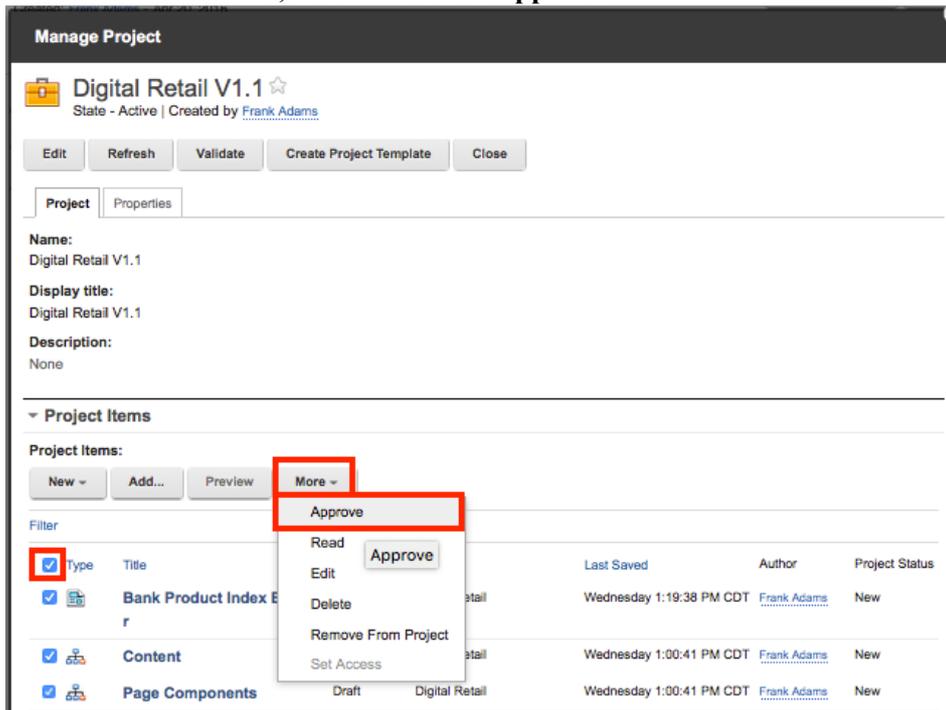
- __57. In the interest of time, you will publish the project with all its current items as-is. Open your project and click **Open Overview**.



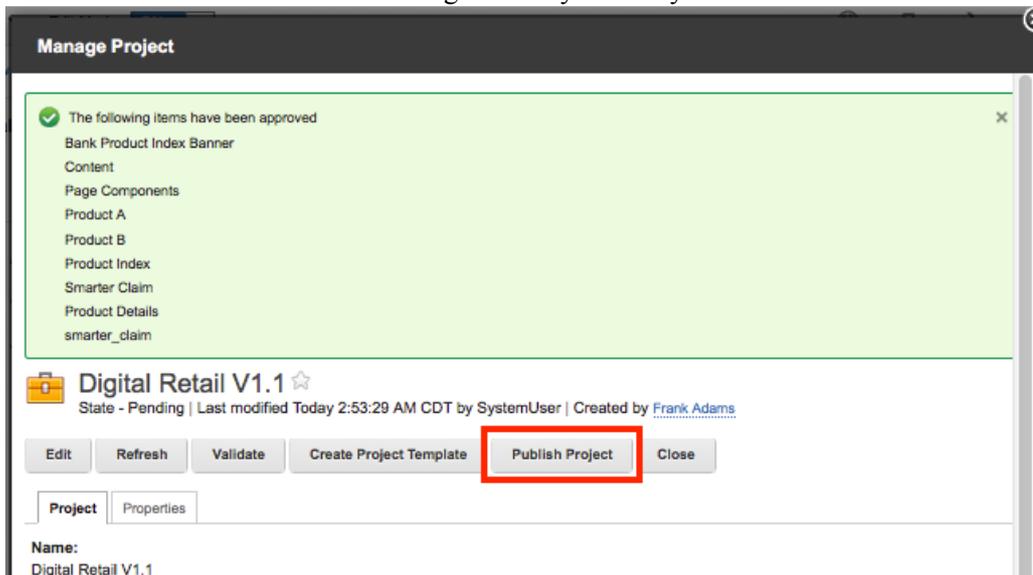
- __58. You will see your current project with all items that are part of it and that were created earlier. It also shows each item's corresponding workflow status. Click **Manage Project**.



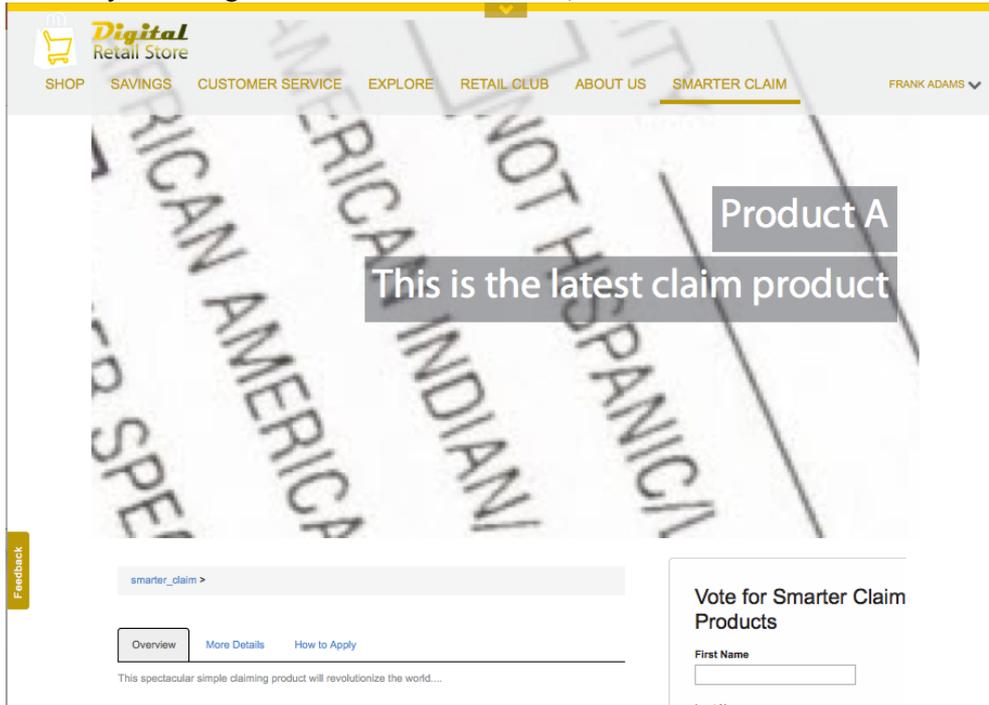
59. You want to approve all items now. Normally, you would select each item in the above bar, review it and approve it individually. However, for this exercise, you will approve all changes at once. Select the all items check box, select **More** and **Approve**.



60. Click **Publish Project** to publish all approved items now. You may configure some of your contents to be published automatically to social media, like LinkedIn, Twitter and Facebook, or to IBM Connections. This has not been configured for your site yet.



61. Now all your changes are visible in the live site, shown as Published Site.

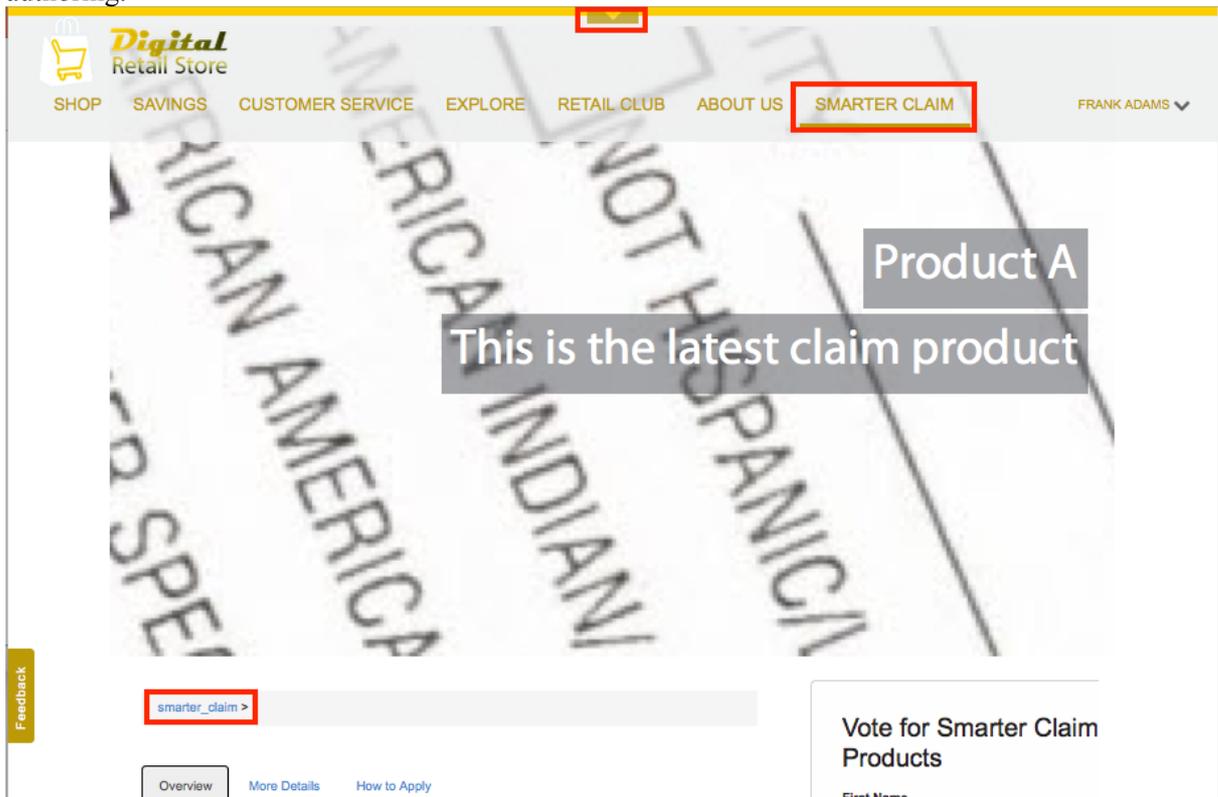


You now have successfully created and published a new version of your Digital Retail site where you added the Smarter Claim Products page with your content, components and form.

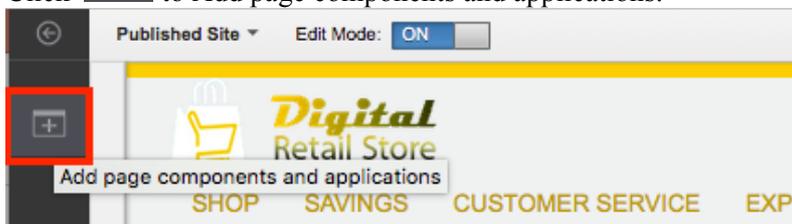
Step 5 Apply Personalization and Multi-channel Access

In this step, you will see how you can take advantage of personalization capabilities to deliver tailored experiences to different audiences, how the web page adapts itself automatically to different devices with its inbuilt multichannel functionality and use the built-in mobile preview.

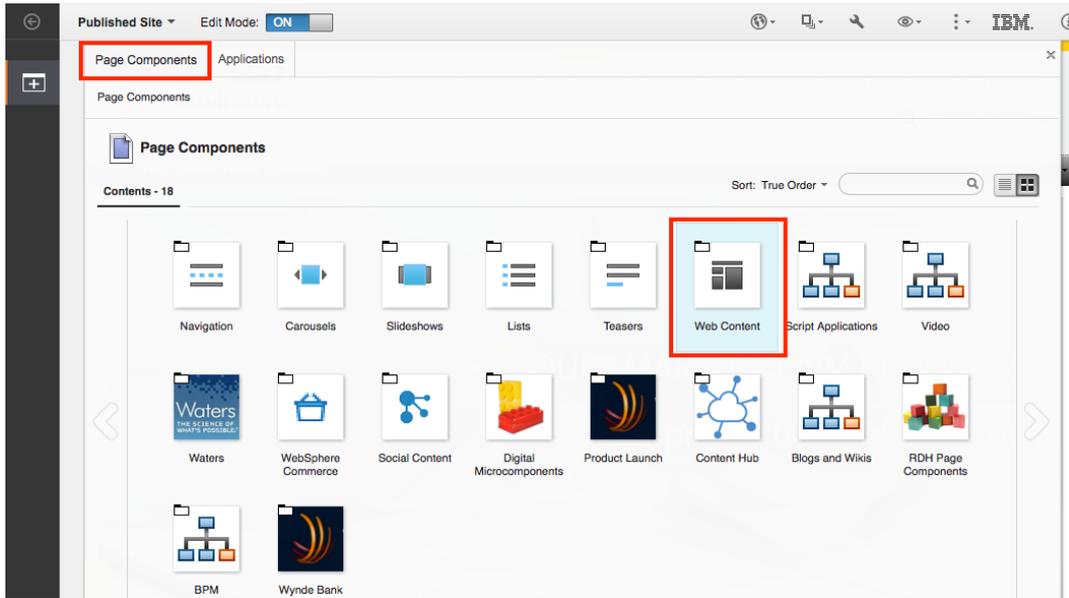
1. First you will create a new piece of rich text web content that will be configured to show different content depending on the device being used to access the site. If a Smartphone or Tablet visits your site, that user will be prompted to download your mobile application in the app store. This time, you will again make changes directly on the live site, rather than via a project. Click on the published **SMARTER CLAIM** page and notice that the parentheses have disappeared, as it is now published. Alternatively, you can use the breadcrumb `smarter_claim`. Then click on  to switch to authoring.



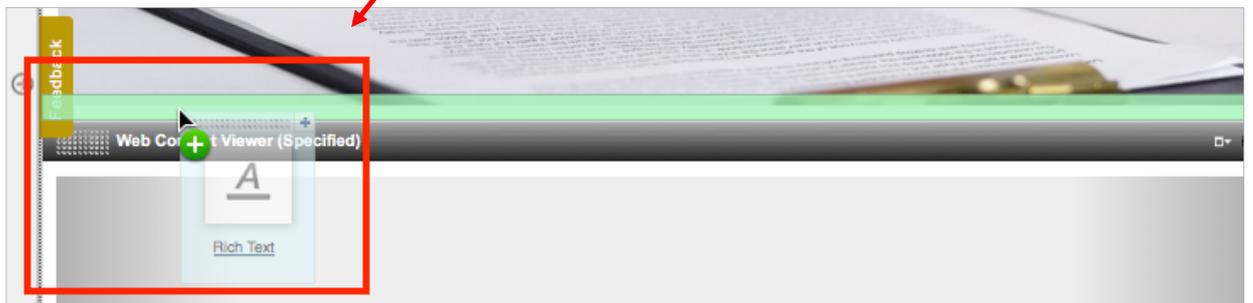
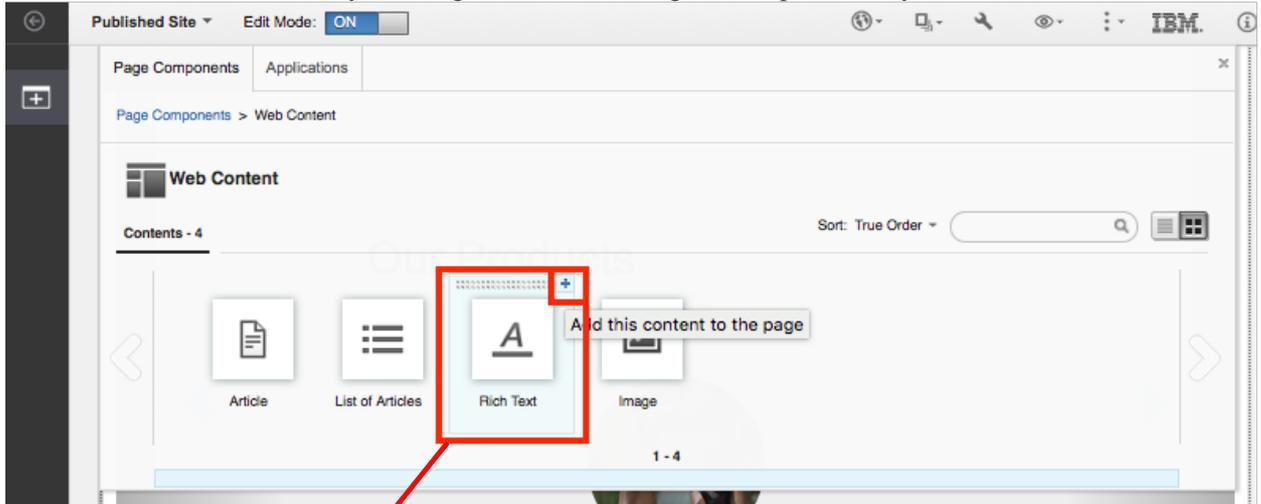
2. Click  to Add page components and applications.



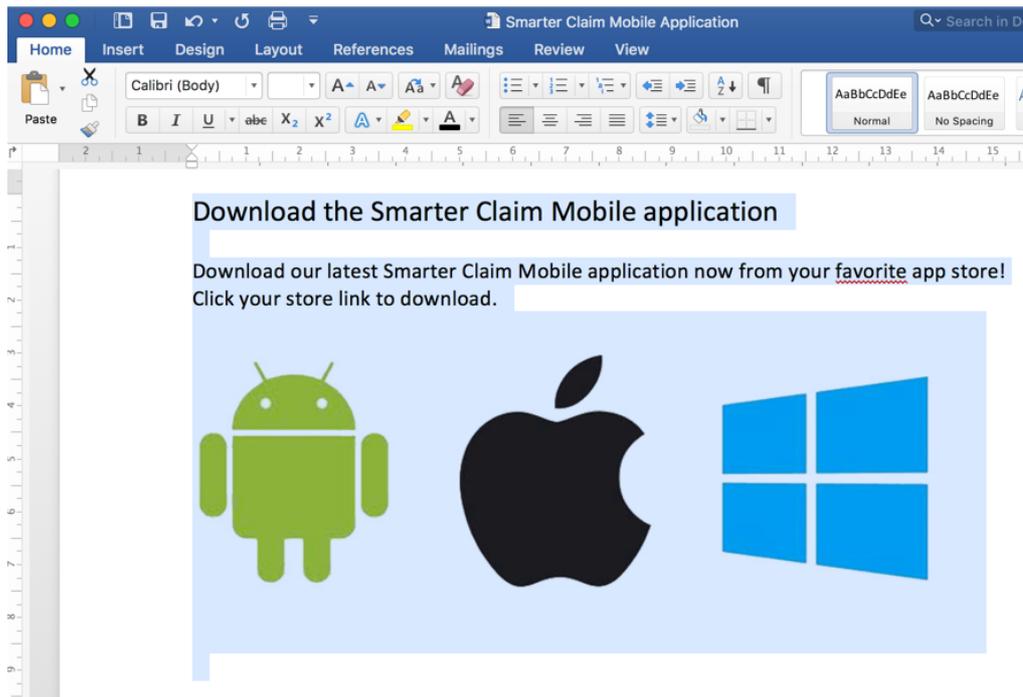
- 3. Notice that from here, you can also easily add WebSphere Commerce, Business Process Management (BPM), Social and more content to your page. Click on **Web Content**.



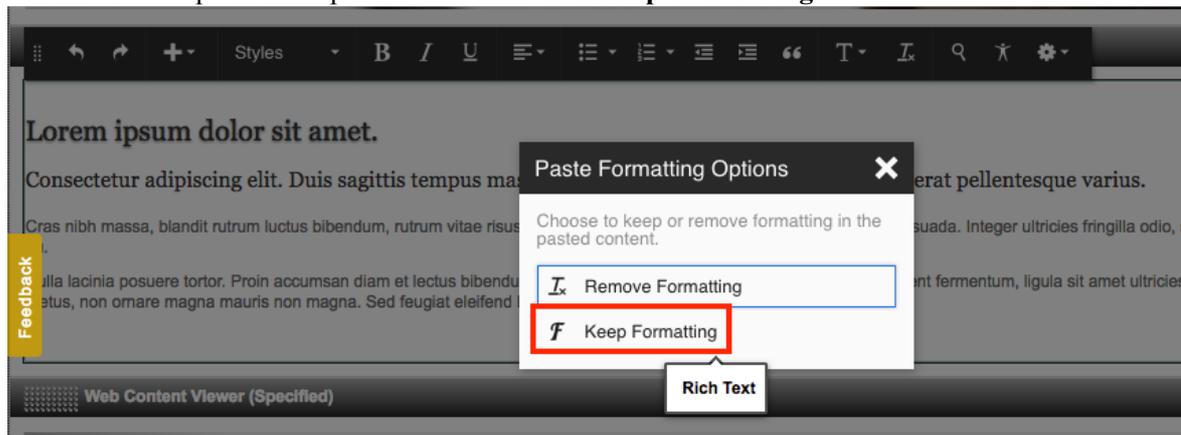
- 4. Add the Rich Text content, by clicking the + icon or drag and drop it directly below the banner.



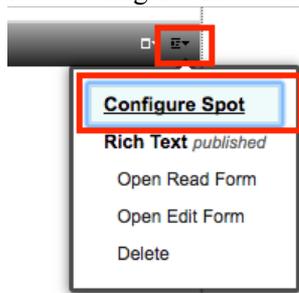
- 5. You may copy the content of the Microsoft Word document from the **Desktop/Digital Experience Labs/Helper Files/User Tour/ Smarter Claim Mobile Application.docx**. Select all text there (**CRTL A**) and select copy (**CRTL C**).



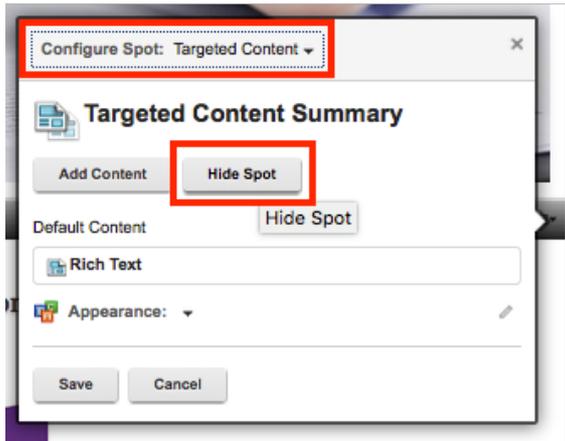
- 6. Now click in the Rich Text, select all existing content (**CRTL A**) and paste it (**CRTL V**) to replace. You have two options. Keep the format and click **Keep Formatting**.



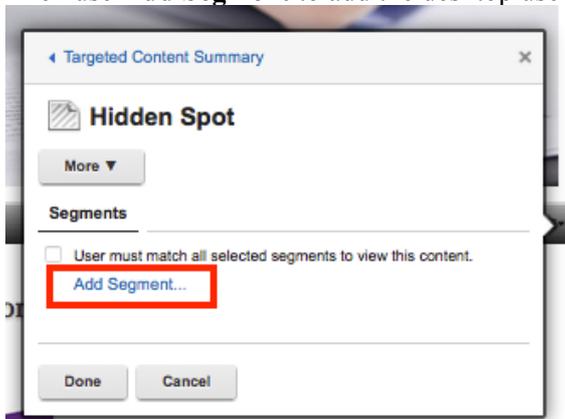
- 7. This content is correctly filtered for you and still has the same format. Click outside of this page component, or **Tab** to save.
- 8. Now configure this Content Spot to hide the message from desktop visitors. Click **Configure Spot**.



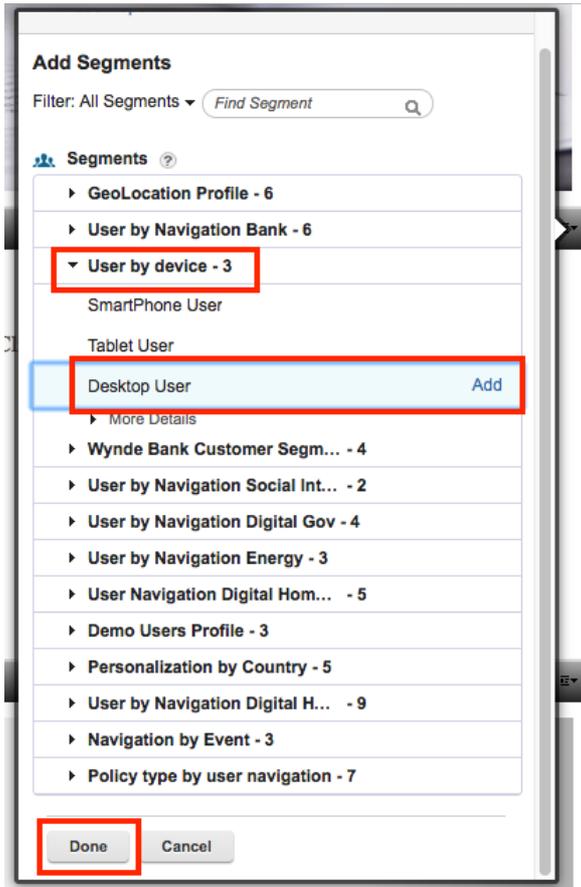
- __9. Change the configuration of the spot from Specified Content to **Targeted Content** and then click **Hide Spot**.



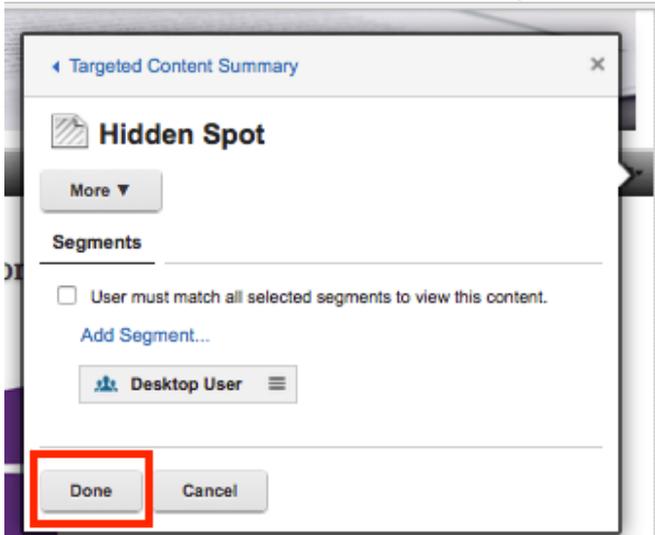
- __10. Then use **Add Segment** to add the desktop users.



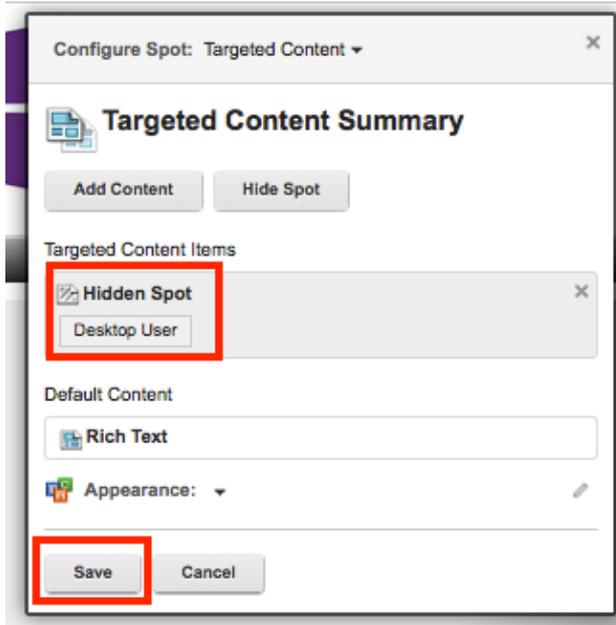
- 11. Here you will find all configured segments to target. These may point to external applications, like your CRM system. You want to target it to users by devices. Click **Use by device** category and then Click **Add** next to the **Desktop User** to add it to hide it from Desktop Users. Click **Done**.



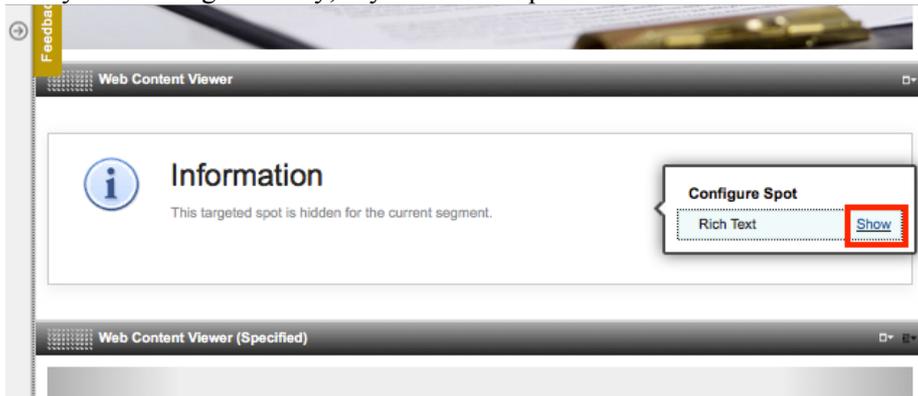
- 12. This should show as follows. Click **Done** again.



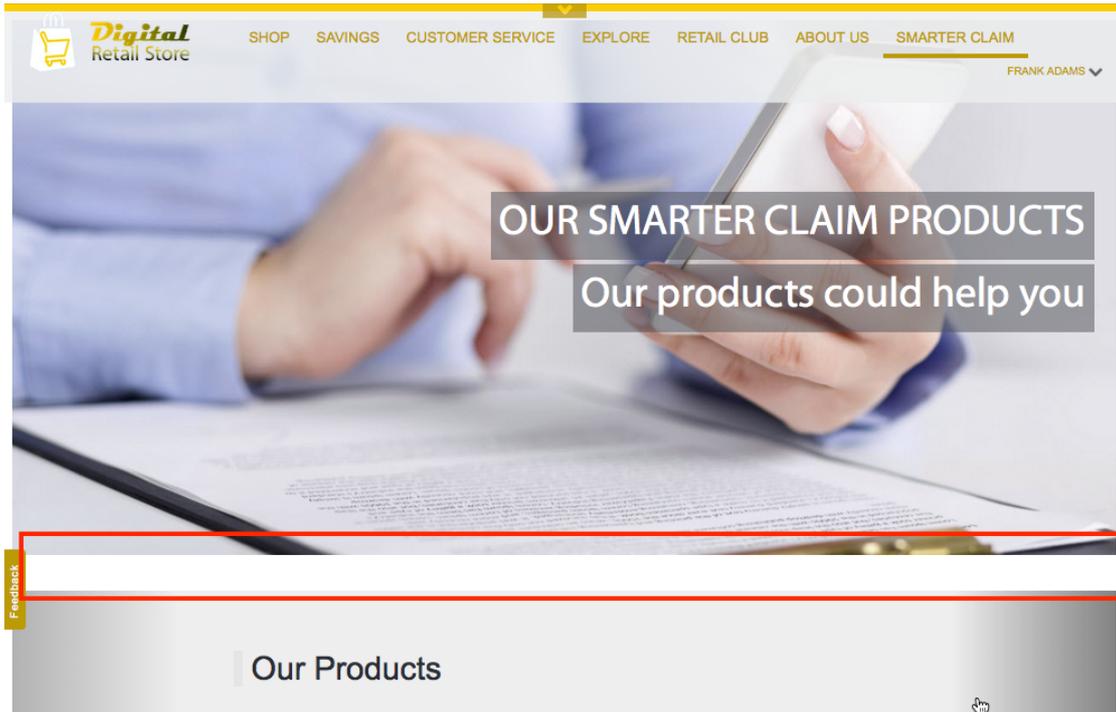
- 13. You will see the summary of your new configuration. You can apply this to any content and with any segments configured in your environment. Click **Save**.



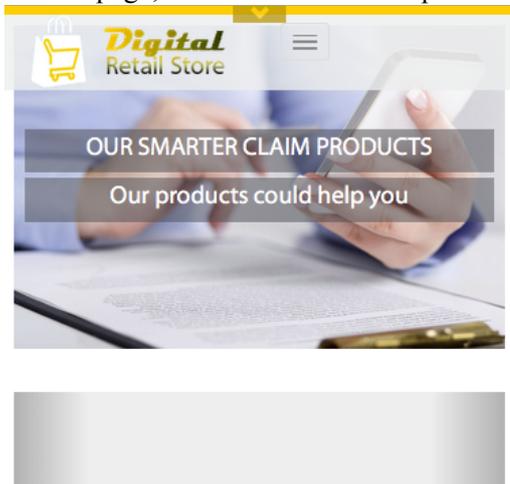
- 14. As expected the content is now hidden, as you are working on a desktop device. Notice you can always show it again easily, if you need to update it.



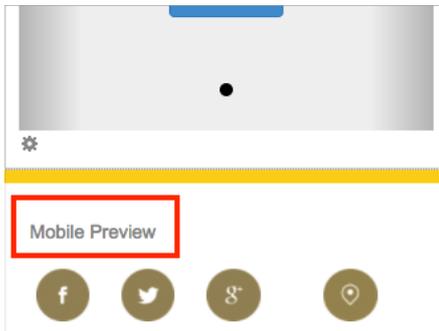
__15. Now switch back to **View Mode** . Your new mobile content is now not showing.



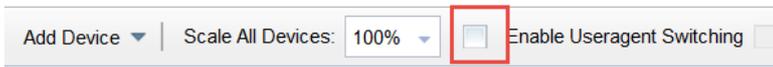
__16. Diminish little by little the width of your browser to show that your page adapts itself automatically to it. Watch carefully how images and texts change to optimize it to your screen size. In the Product Details page, even the columns adapt themselves.



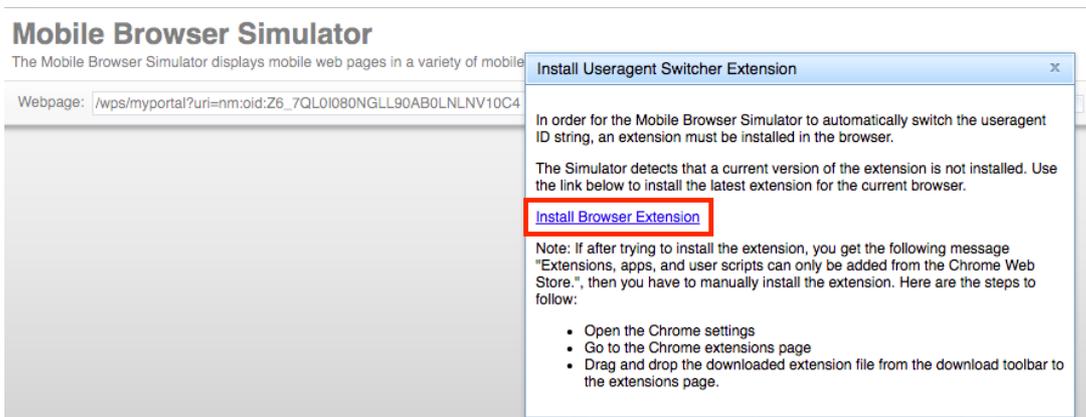
- __17. And if you access the same site with specific mobile phones, it further adapts it automatically for you. To test this, you may use the open the same URL with your tablet and/or SmartPhone. You may also use the built-in Mobile Preview option. If you do not wish to test this, as it requires to install a plugin on your browser, or use a dedicated mobile preview solution, go to the end of this step. Otherwise, scroll down and click **Mobile Preview**.



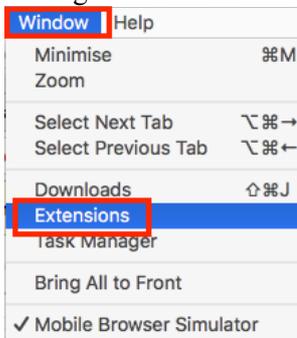
- __18. This opens a new window with the Mobile Browser Simulator with by default an iPhone 5 as smartphone device. If you have not done this yet, you need to enable the **Useragent** switching to simulate the selected devices correctly once. If you have already done this, you can directly go to step 22. Ensure you are not using other user agent plugins. Select **Enable Useragent Switching**.



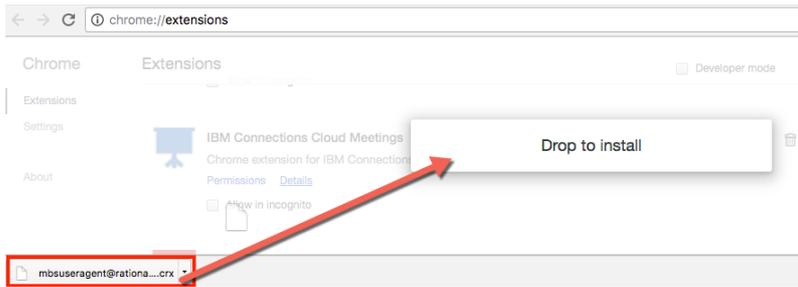
- __19. This opens the installer. If you are in Chrome, click **Install Browser Extension**. For Firefox, skip to 22.



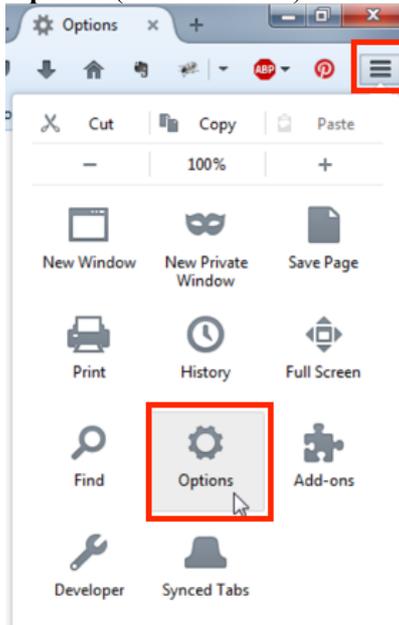
- __20. Then go to the Window menu and select **Extensions**.



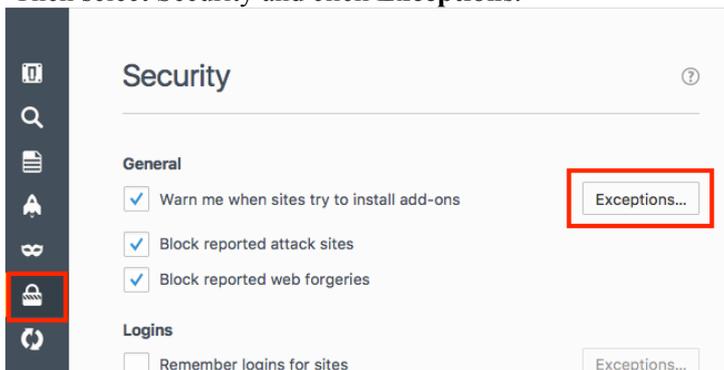
__21. Drag and drop the downloaded file to this window.



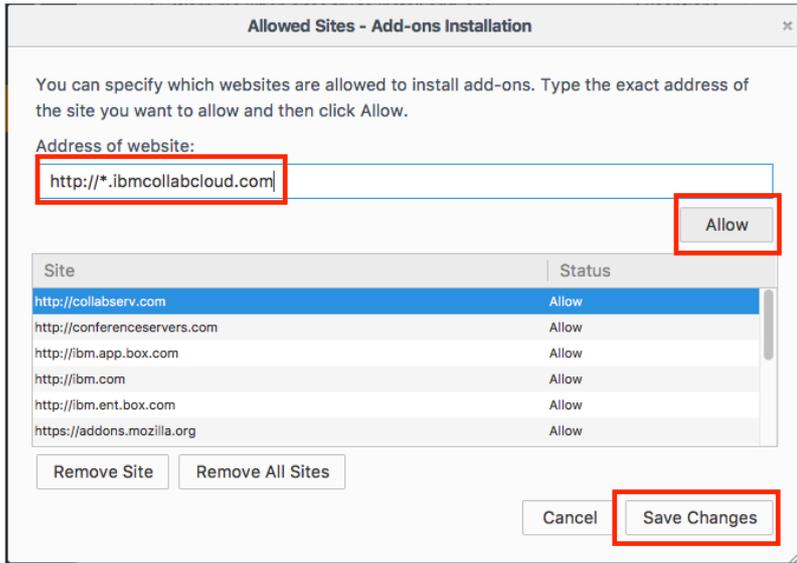
__22. If you are in Firefox, you first need to authorize your server to install this plug-in. Go to you Firefox **Options** (or Preferences).



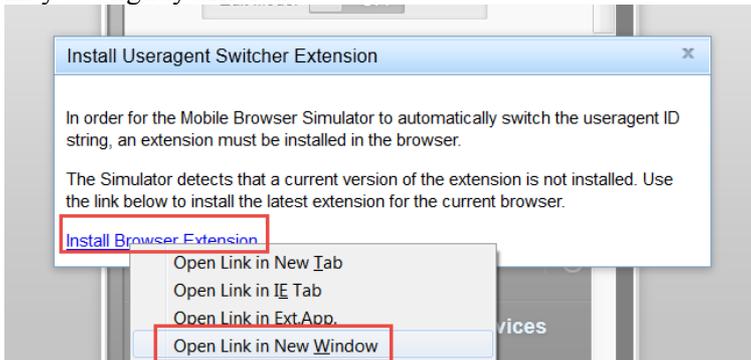
__23. Then select Security and click **Exceptions**.



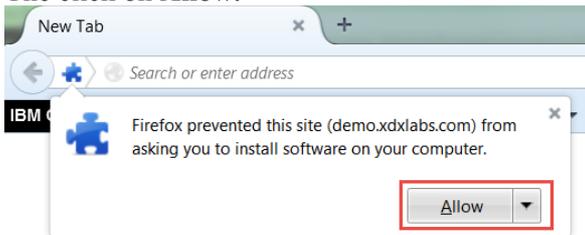
24. And then add the host of your server to the list of trusted sites, e.g. http://*.ibmcollabcloud.com.



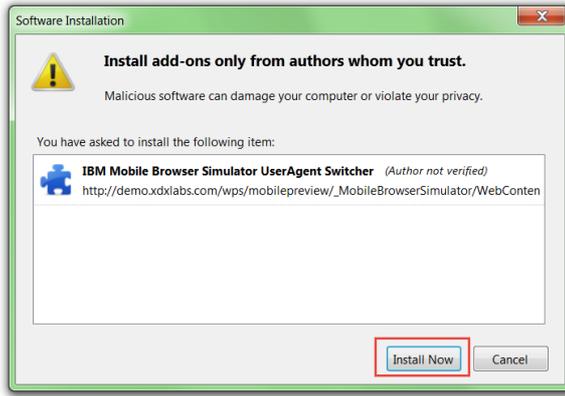
25. Then go back to the Mobile Preview page and open the browser extension in a new Window. Right click on **Install Browser Extension** and then **Open Link in New Window**. On other browsers, this may be slightly different.



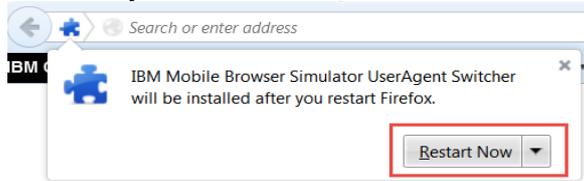
26. The click on **Allow**.



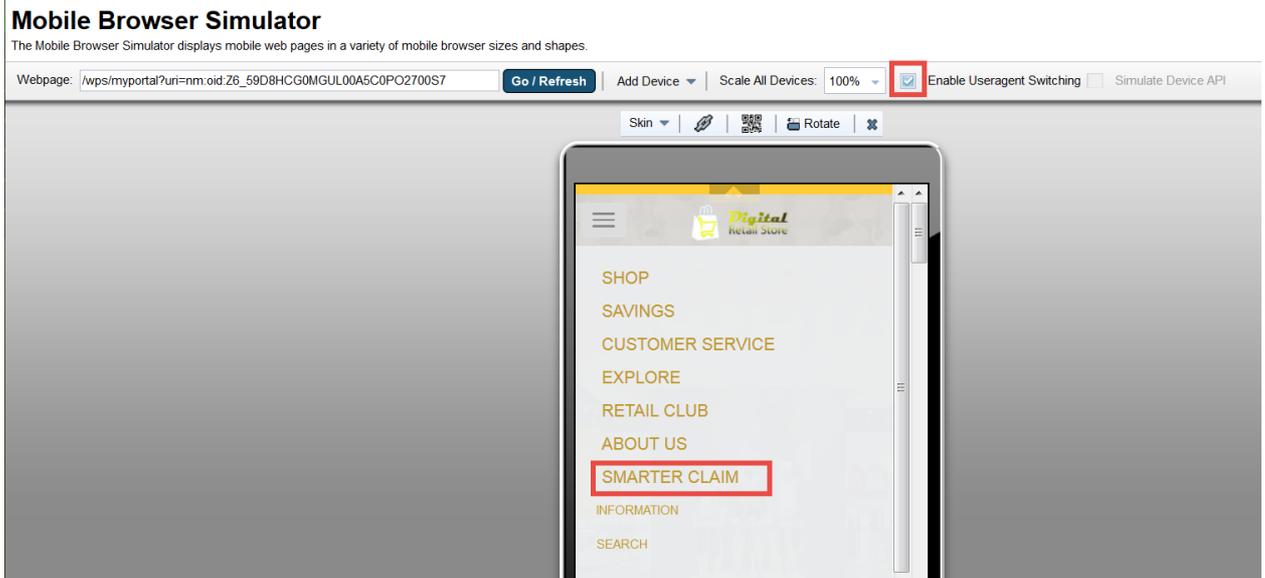
__27. Then **Install Now**.



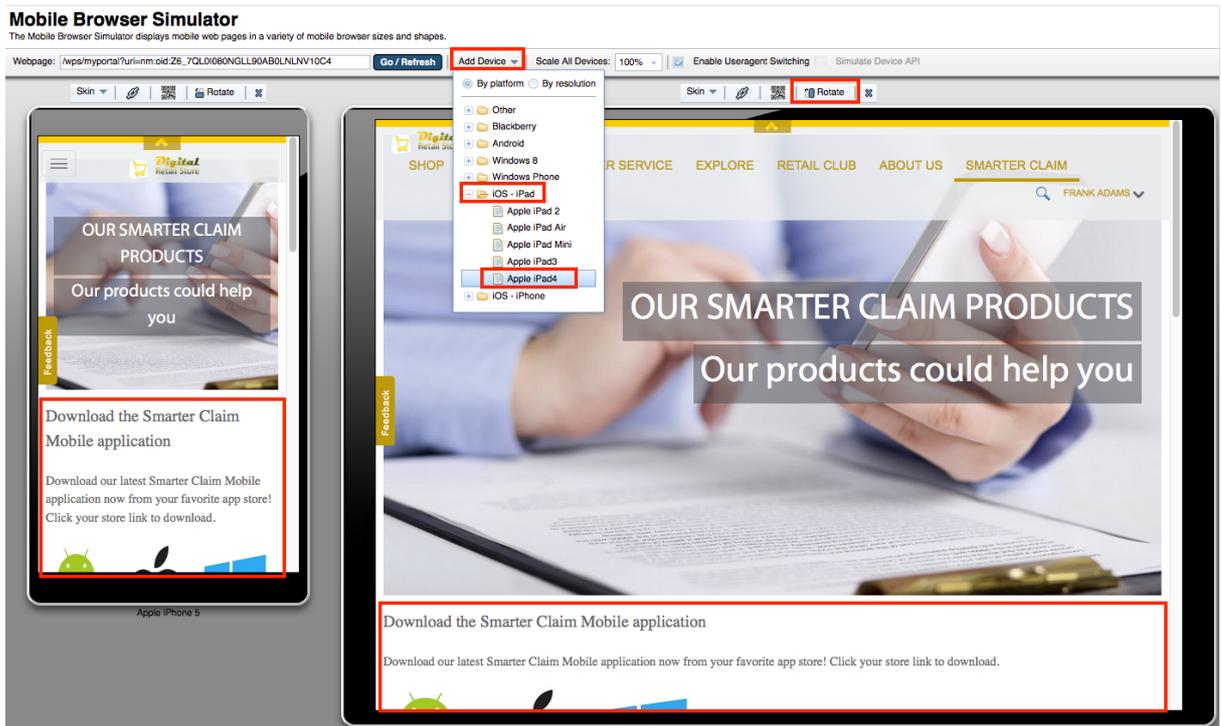
__28. And finally **Restart Now**.



__29. Your browser now opens your site with a mobile device. It has changed the whole navigation, so with “thick” fingers you can still navigate easily. Check that the Enable Useragent Switching is enabled. Then click your **SMARTER CLAIM** page.



30. This now shows your mobile targeted content again, as the server recognizes the device that is used. You can easily test with other devices as well. Click **Add Device** and choose any of the preconfigured devices, eg. **iOS – iPad – Apple iPad 4**. Click on **Rotate** to put it in landscape.



31. There are different options available, such as showing the QR code of your current page to read it with an external device and rotate it. Open the QR and notice the QR bar. You may scan this QRCode with your tablet or Smartphone to see it loads the right URL and shows your site correctly on that device.



32. Close this window to get back to the desktop view.

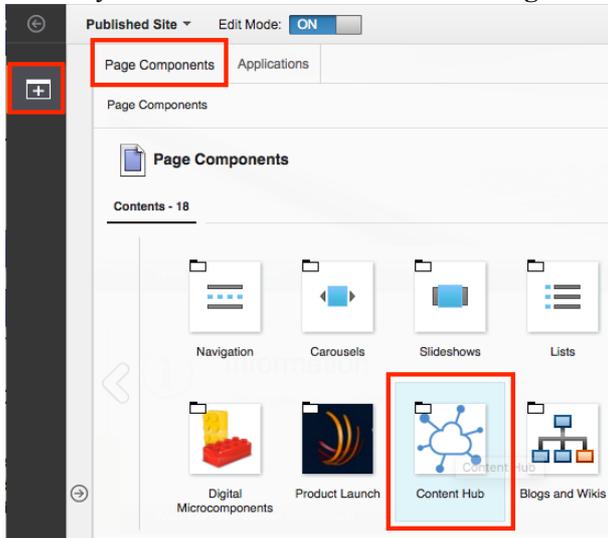
In addition to this integrated mobile preview, it is possible to embed the personalized content within mobile applications on one or multiple app stores (e.g. iPhone, Android), using MobileFirst. This allows you to have flexible ways of using the web site, and keeping everything centrally managed.

You have successfully personalized your content and tested this with different mobile devices, using the built-in mobile preview capability.

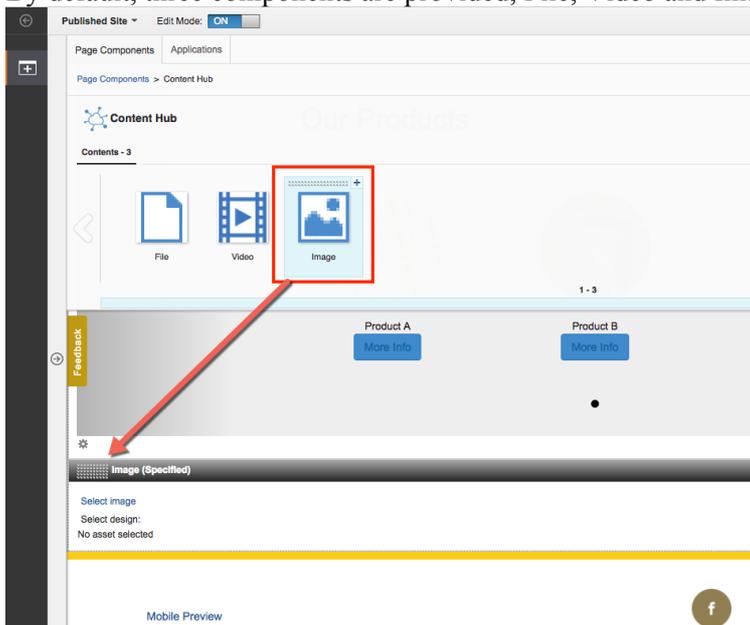
Step 6 Consume an image asset from external application

In this step, you will add an image from an external application. This is just another Page Component to add and configure. The presentation is again managed in IBM Digital Experience.

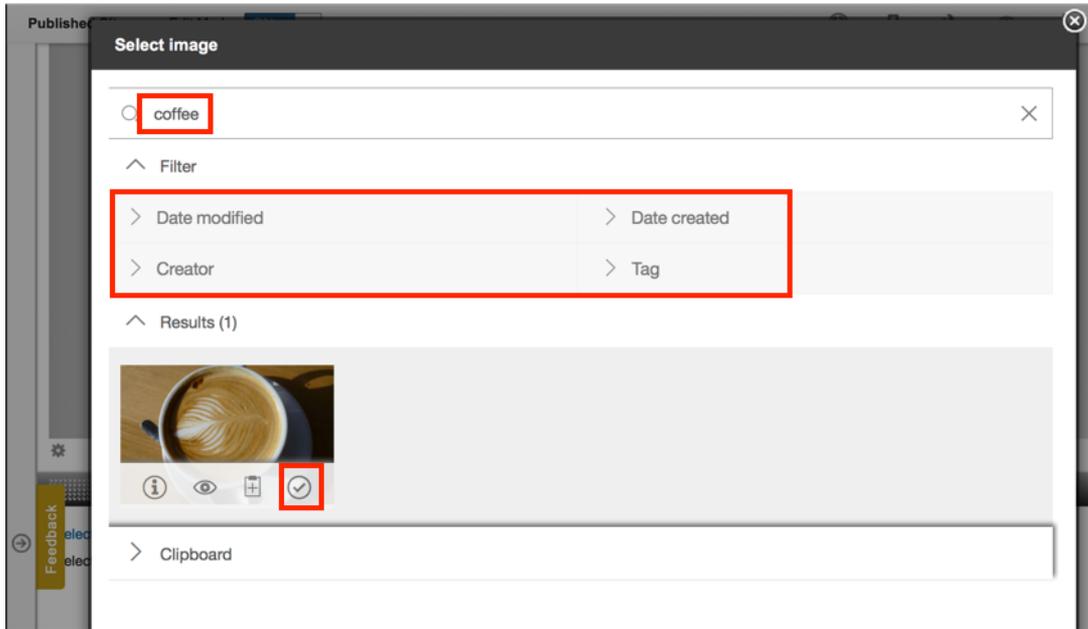
1. Ensure you are in edit mode. Then add a **Page Component** and select the **Content Hub** category.



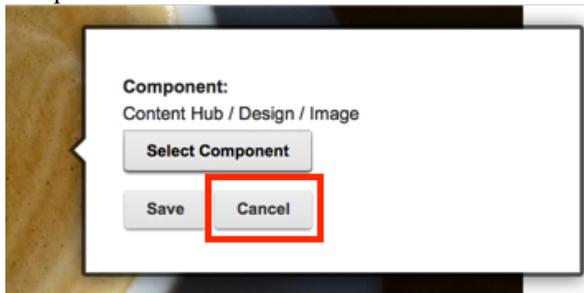
2. By default, three components are provided, File, Video and Image. Drag the **Image** to your page.



- 3. Then click **Select Image**. This opens the content picker. Use the search and filter options to find the right asset easily. Then select it, as shown.



- 4. Notice that if you hover over this image, you may be able to select the appearance of your selection. Keep it as default and click **Cancel**.



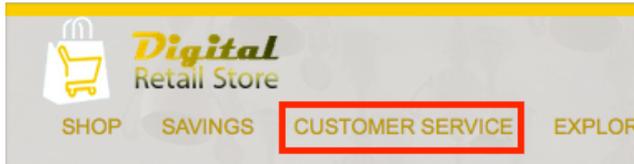
You have successfully consumed external application data from IBM Watson Content Hub.

Step 7 Adding a new online Customer Service

A key functionality of the IBM Digital Experience is the possibility to integrate different applications and make them work together. As a business user, you will create a new online customer services to provide access to the new beta drone delivery for your customers.

In this step, you will be discovering one of our integration tools, the **Script Application** which allows you to build very fast dynamic portlets that can communicate with each other and other portlets, using simple HTML, JavaScript and CSS skills. It is part of an extensive list of development tools and out of the box portlets that gives you a fast start for your digital experience implementation.

- __5. First navigate to the **CUSTOMER SERVICE** page which has been created with the site template as well.



- __6. As you can see, many customer services are already available. Now go to Edit Mode .

Registry
Our registry experts are available to help you one-on-one, free of charge, over the phone and in our stores. Call ahead or just walk into any one of our over 190 locations for a private appointment.

Policies
Learn about our shipping, coupon, and return policies so that your retail shopping experience with us is smooth and enjoyable!

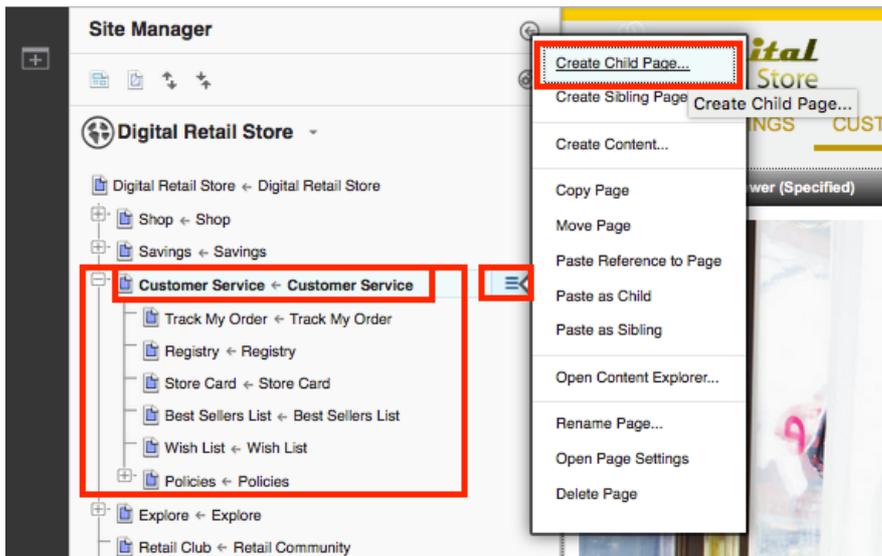
Track My Order
We're always working to improve our tracking. Here are some of the ways we're making package tracking better. * View End-to-End tracking with up to 11 scan events on shipments - from pick up to final delivery - with more frequent updates.

Wish List
Forgot what was on your Wish List? Here's a reminder of what is on your Wish List. You can add, edit, or delete items on your Wish List. You can also set your preferences for your Wish List as well as share what is on your list to your friends or family.

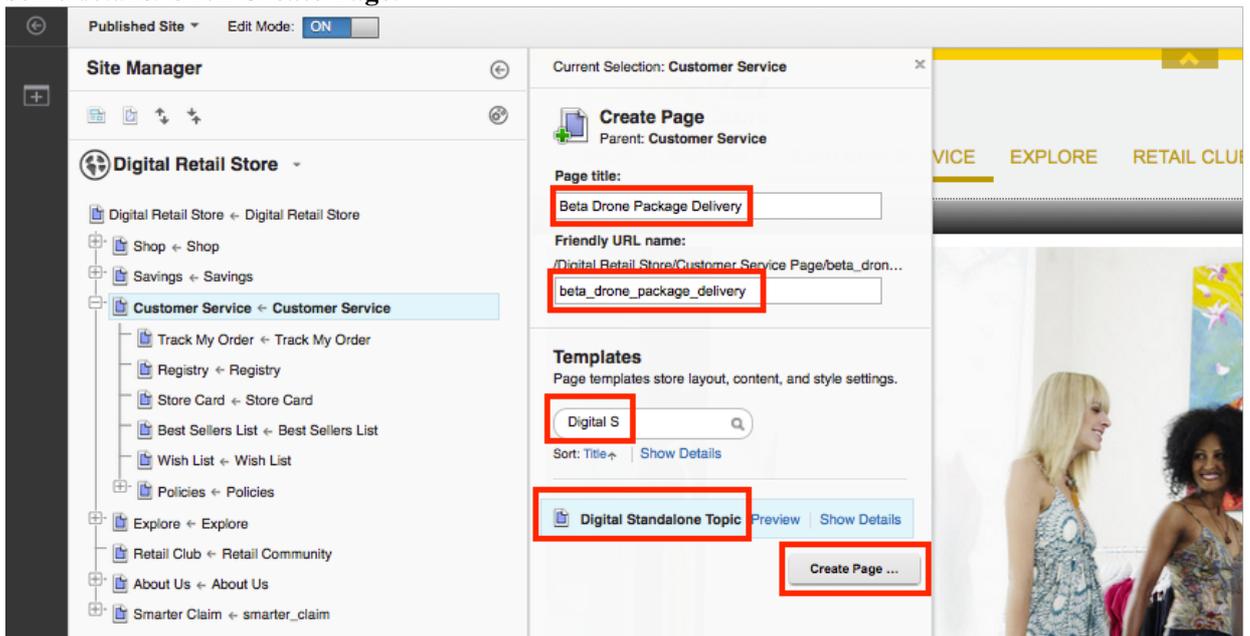
Digital Home Store Card
Sign up for your Digital Home Store credit card today and start earning points towards your next purchases and enjoying all the great benefits being a retail club member has to offer!

Best Sellers List
List of items that are currently trending or items that are most popular and selling well. Browse the items and find a steal!

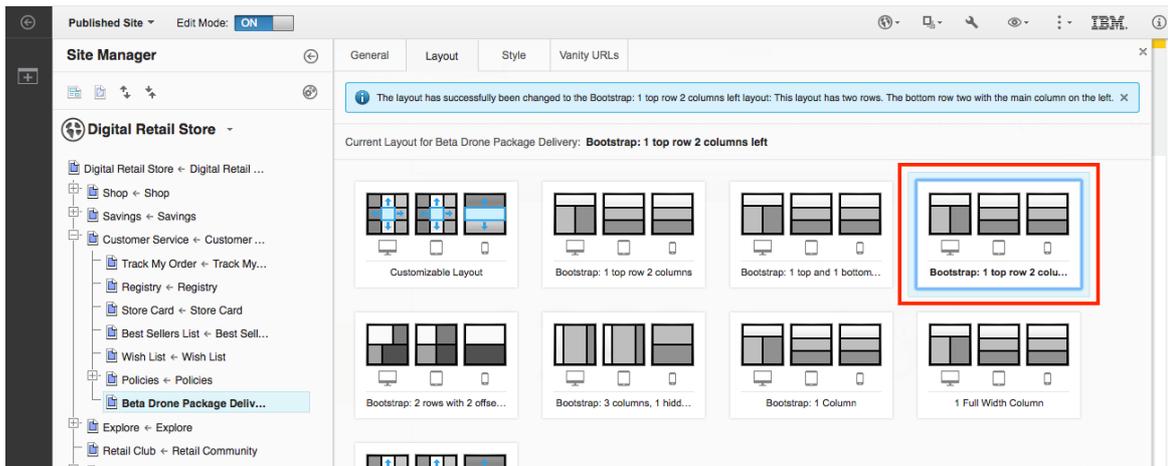
7. If you expand the page, you will see that each service is managed by dedicated pages. You will add a child page for your beta drone delivery. Ensure your **Customer Service** page is selected. Then click **Create Child Page**.



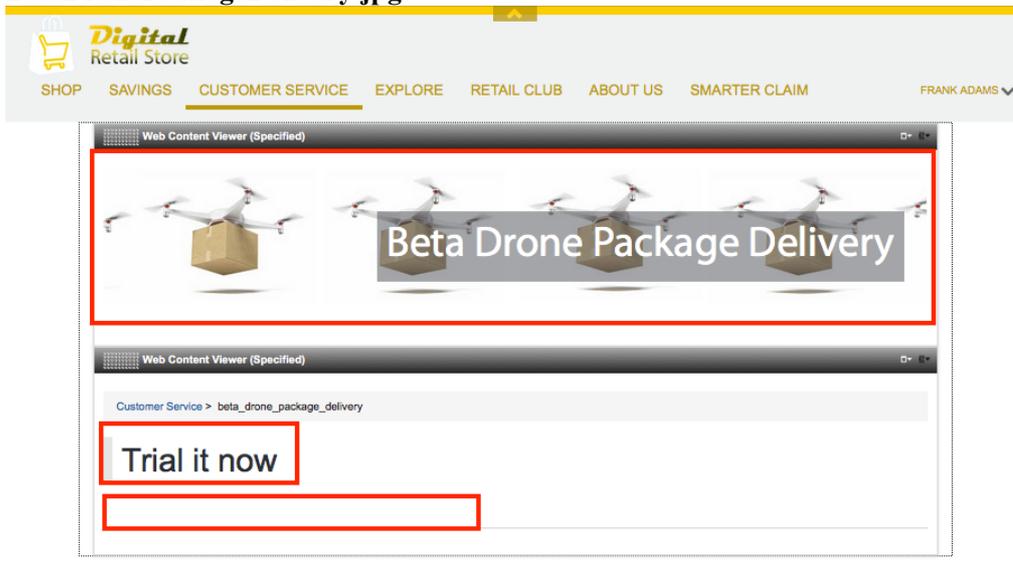
8. Name your page **Beta Drone Package Delivery** with corresponding friendly URL and select the **Digital Standalone Topic** page template. This creates a single page configured with a header and some details. Click **Create Page**.



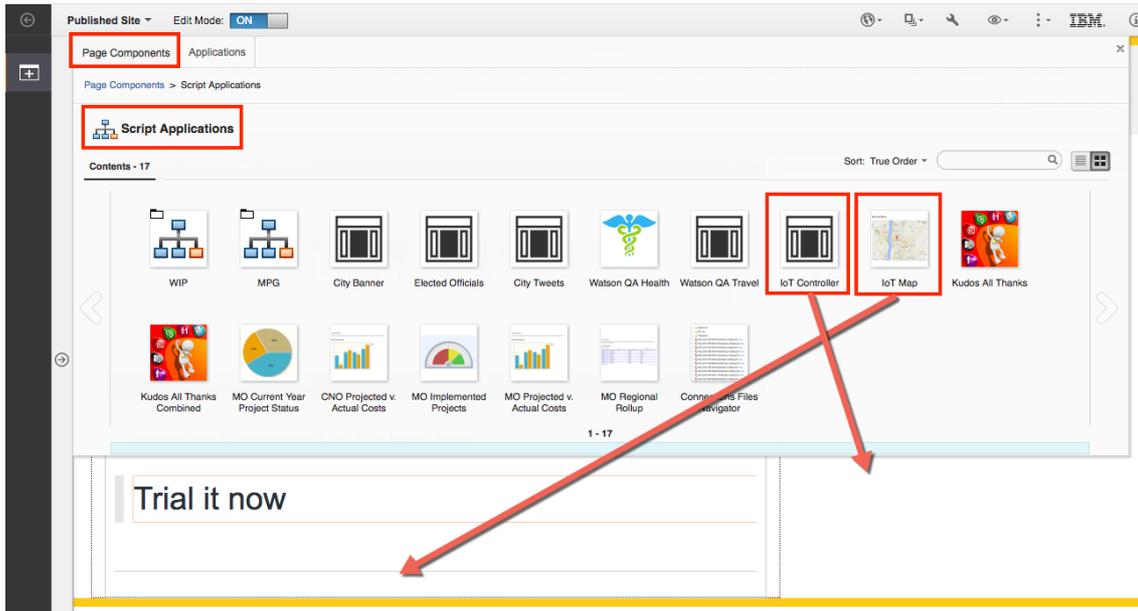
9. Then change the page layout, so you can fit in the two application components horizontally. For your new page, select **Open Page Settings**, then **Layout** and choose the **Bootstrap: 1 top row 2 columns left** layout as shown. Then close the page settings.



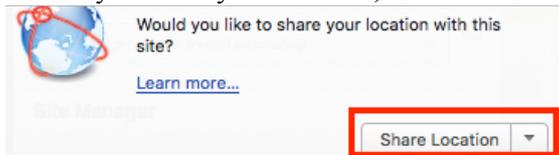
10. Then put the portlets on the top row and change the header and description as follows. You may use the image **Desktop/Digital Experience Labs/Helper Files/User Tour: BetaDronePackageDelivery.jpg**.



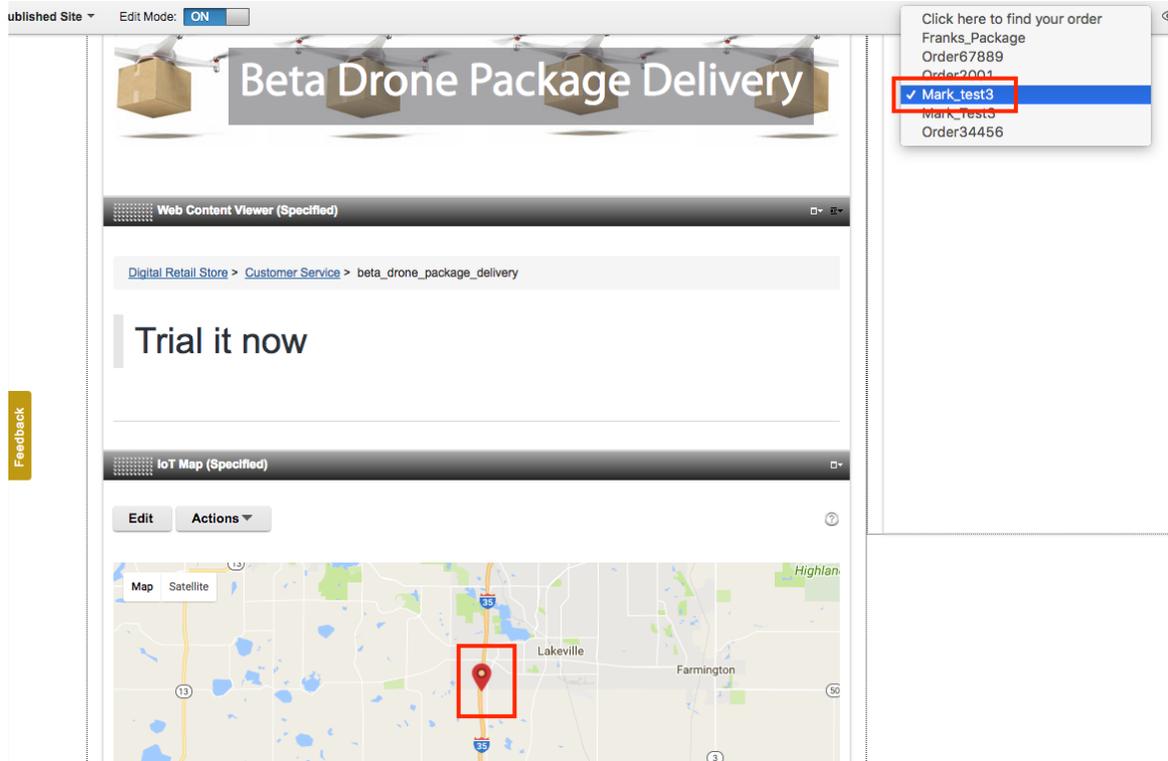
- __11. Now you will add your applications components. Click , then **Page Component** and **Script Applications**. Then drag **IoT Map** to the left column and **IoT Controller** to the right column, as shown.



- __12. Ensure you share your location, as otherwise the map will not display.



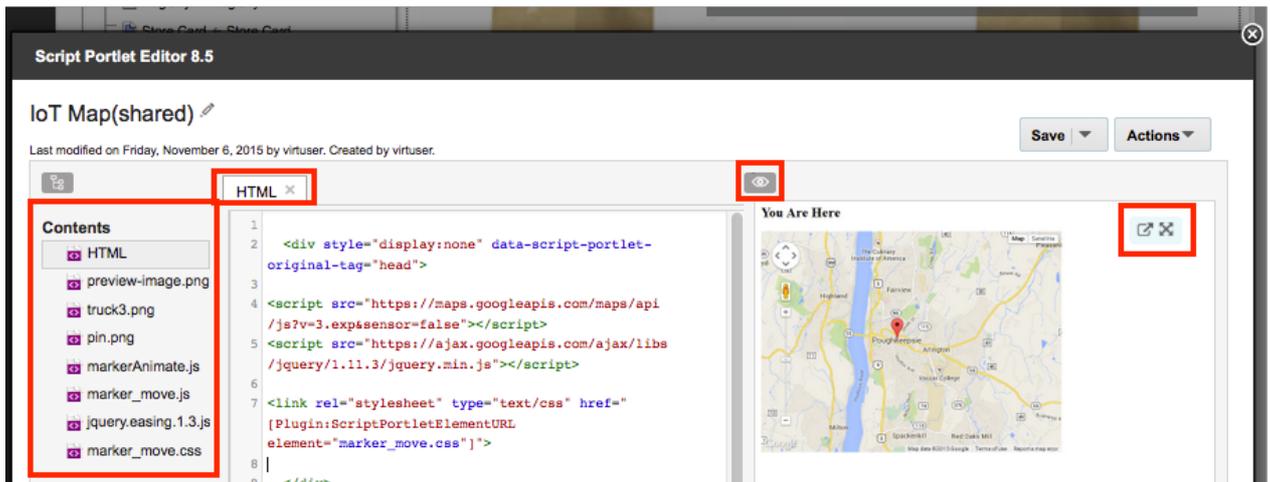
- 13. These are application component created using the **Script Application**. The **IoT Controller Script Application** looks up specific Internet of Things (IoT) devices and lets the user select any of them. It then shares the selection to the **IoT Map Script Application**, who uses it to show the real-time delivery of that device on an external application: Google Maps. In the IoT Controller component, select the **Mark-test3** device (it is still beta!). This is the beta drone connected to IBM’s Internet of Things. See how it updates the **IoT Map Script Application**.



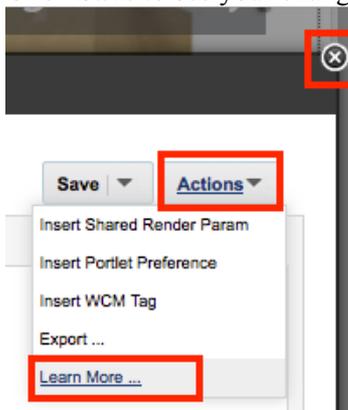
- 14. You can see that both page components are Script Application Content Items and can be edited. You can also import, export and download the Command line tool to develop them locally with your favorite tools. Click **Edit** on the **IoT Map Script Application**.



- 15. This opens the **Script Application Editor**. It shows your content, a place to edit and preview pane (which allows to preview in a dedicated window or enlarged one). As you can notice, it is all based on standard HTML, CSS and JavaScript and can be created and modified by many people.



- 16. If you wish, feel free to look around and make some changes. You may also use your favorite design tools to build these Script Applications and push them into the Site Toolbar. Under the **Actions** menu, you will have access to functions to manage render parameters, which allow to share data between different portlets. It also allows your end users to set any portlet preferences that you may use in the script. And you can export it to use in other environments. You can also learn more on this topic. Click **Save** to see your changes in the preview pane. When done, close the editor.



- 17. **Close** the Script Application editor. You may also update some other hidden data for this new service that may appear in other places, like the parent Customer Services page. You can access that using the **Open Edit Form**. Leave it as it is for now.



- 18. Then switch to **View Mode**.

If you are interested in more Script Application examples, as well as other integration examples with IBM Connections, Forms Experience Builder and combinations of different applications (e.g. Connections and Forms Experience Builder under the Opportunities) pages, you may have a look at Appendix B.

Providing business pages with applications and content coming from many different places, nicely integrated, with a same look and feel and personalized, allowing your business users to get their work done easier and faster is the typical way of using our Digital Experience. As a business user, all information you need to make the right decisions are put together in a simple user interface, can be acted on and updated easily and are accessible in your preferred device.

Another good example, you may want to look at is the recorded demo of a marketing manager of Greenwell Internet who needs to promote kid bikes and brings together rich content, such as photos, videos, social forums coming from Connections, Commerce products, etc.: <https://www.youtube.com/watch?v=Idrueug10wQ>.

You have successfully discovered the integrated applications. IBM's Digital Experience has many development and integration tools to integrate your applications into your sites fast and easy.

CONCLUSION

You have now seen that in little time, you can build your own customized multichannel sites.

In this lab, you have learned how to build a complete new site using site templates, add and update new pages, portlets, components and content. Specially, you learned how to build forms and analyze the user input. Often changes to a site will be made by several users including business users, administrators and designers. Once all the changes have been made, previewed and approved, a final approval for all the changes can be made so that all the changes are published to the production site. Again, a Project can be used to prepare these changes and publish them at the right moment.

You also discovered how different applications can be easily created based on applications, components, forms, content that may communicate to each other and are adapting itself to different devices with its personalization and multichannel support.

You have successfully completed this lab and your site is ready for reuse. Feel free to use different site, page and content templates and add your own applications and content to extend your site and/or build new ones!

You may also go to Appendix A to discover the multilingual CTC Demo conference site, Appendix B to understand how this was build and Appendix C to learn more about integration examples. If you wish to make any changes to the home page, ensure you apply the corrections for your Home Page, as explained in Appendix D.

RESOURCES

IBM Digital Experience Web Site:

<https://www.ibm.com/us-en/marketplace/collections/digital-experience-solutions>

IBM Digital Experience Wiki:

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

IBM Digital Experience Developer Center:

<https://developer.ibm.com/digexp/>

IBM Digital Experience product documentation:

<http://www.ibm.com/developerworks/websphere/zones/portal/proddoc/index.html>

developerWorks Portal Zone:

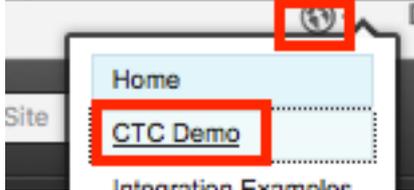
<http://www.ibm.com/developerworks/websphere/zones/portal/>

Appendix A Discover the Content Template Catalog Demo Conference demonstration site

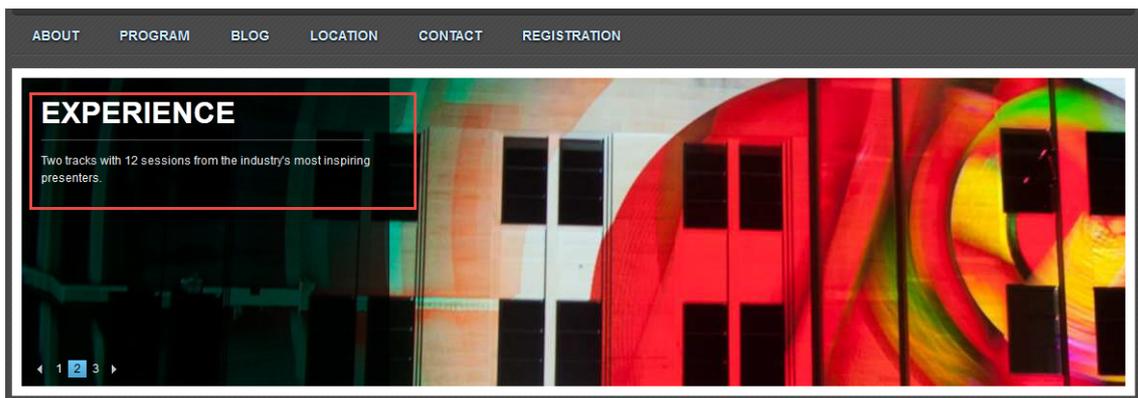
In this appendix, you will discover some of the functionality of the multilingual CTC Demo Conference demonstration site and how to navigate the site. This is the site that gets deployed on your development server, as part of the IBM Content Template Catalog, documented here:

https://www.ibm.com/support/knowledgecenter/SSHRKX_8.5.0/welcome/ctc_welcome.html.

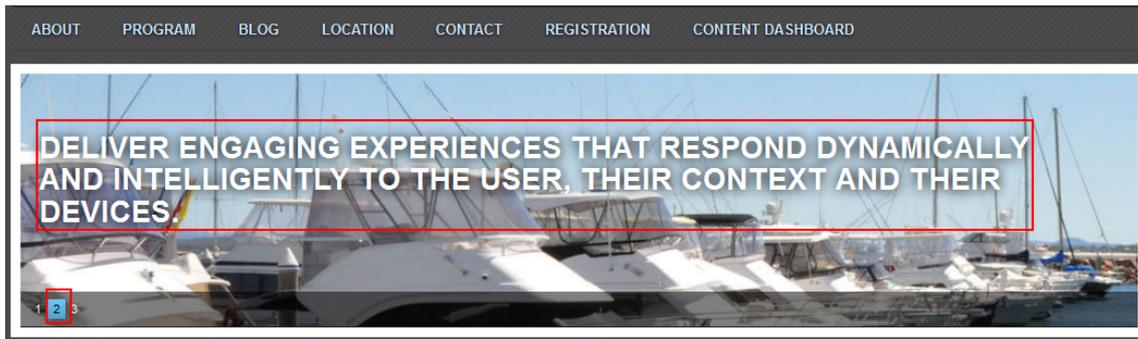
1. Open Firefox, log in and click the **CTC Demo** site link.



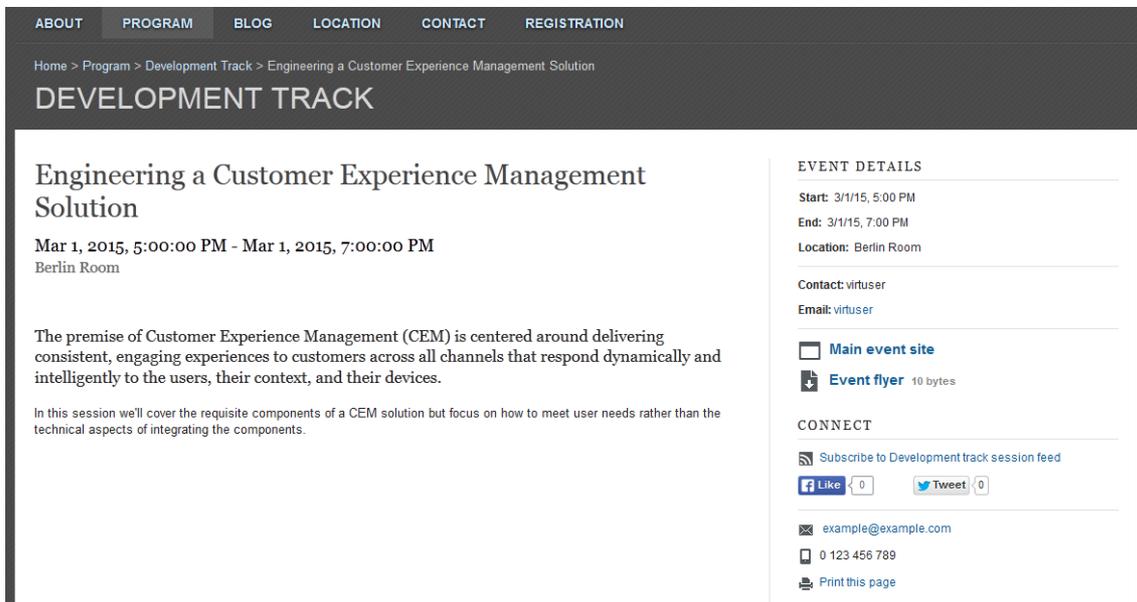
2. This brings you directly to the home page of the CTC Demo Conference demonstration site. The home page, based on a landing page template, shows a promotions carousel component with some built-in pagination controls. It also displays information from other places in the site. For example, the Design and Developer Track information is from the Design and Developer Track page under the Program option in the navigation menu. The Experience Blog is from the Blog page and shows this in a different layout again. Below the blog information, you can see the conference sponsors. In the navigation, you can click through to these pages. The home page also has links to an additional Blog, Contact and Registration pages. Most of this functionality is achieved with some pre-configured components that are provided as part a rich catalog of assets you can use to accelerate building your own sites on IBM's Digital Experience platform.
3. Look at the pagination controls on the promotion carousel component. These allow you to quickly view the available promotions. Click on a number to view the corresponding promotion, or click the forward or back arrows to view the next or previous promotions. Note that the carousel will advance to the next promotion automatically after a short period, looping through the configured promotions.



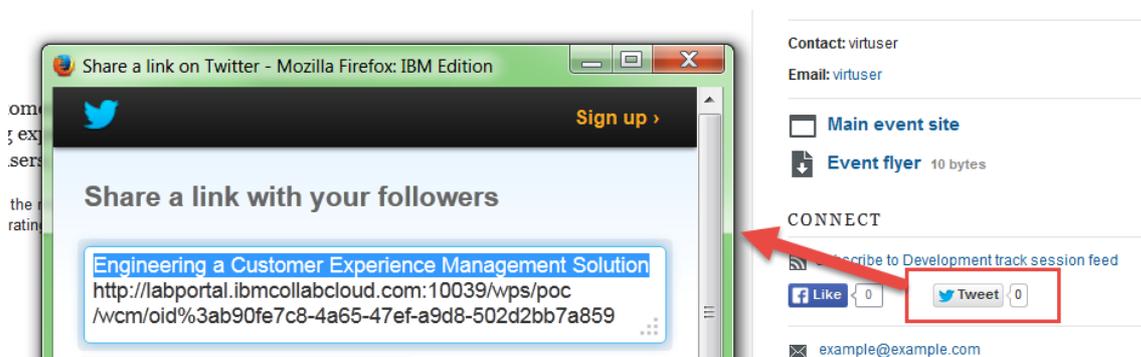
- 4. Click on the second promotion image for **Deliver engaging experiences that respond dynamically and intelligently to the user, their context and their devices.**



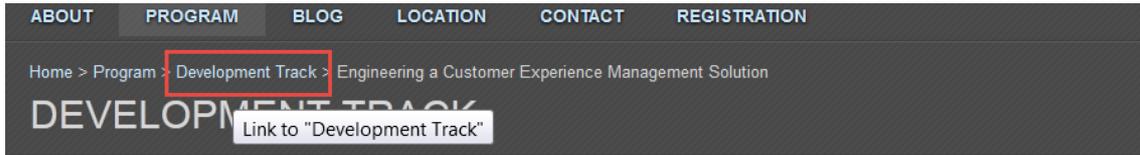
- 5. More details on this track are displayed. From the built-in breadcrumbs in the navigation area, you can see it is an event under the Program – Development Track. The full session description is displayed in the main column on the left, while event details and contact and social sharing information are displayed in smaller areas on the right.



- 6. Under the Connect menu, you find options to share this information with Facebook and Twitter. If you have those accounts, you may select one of the options to share. For example, if you click on **Tweet**, you will be prompted to share this link with Twitter (you may need to be logged in to Twitter first).



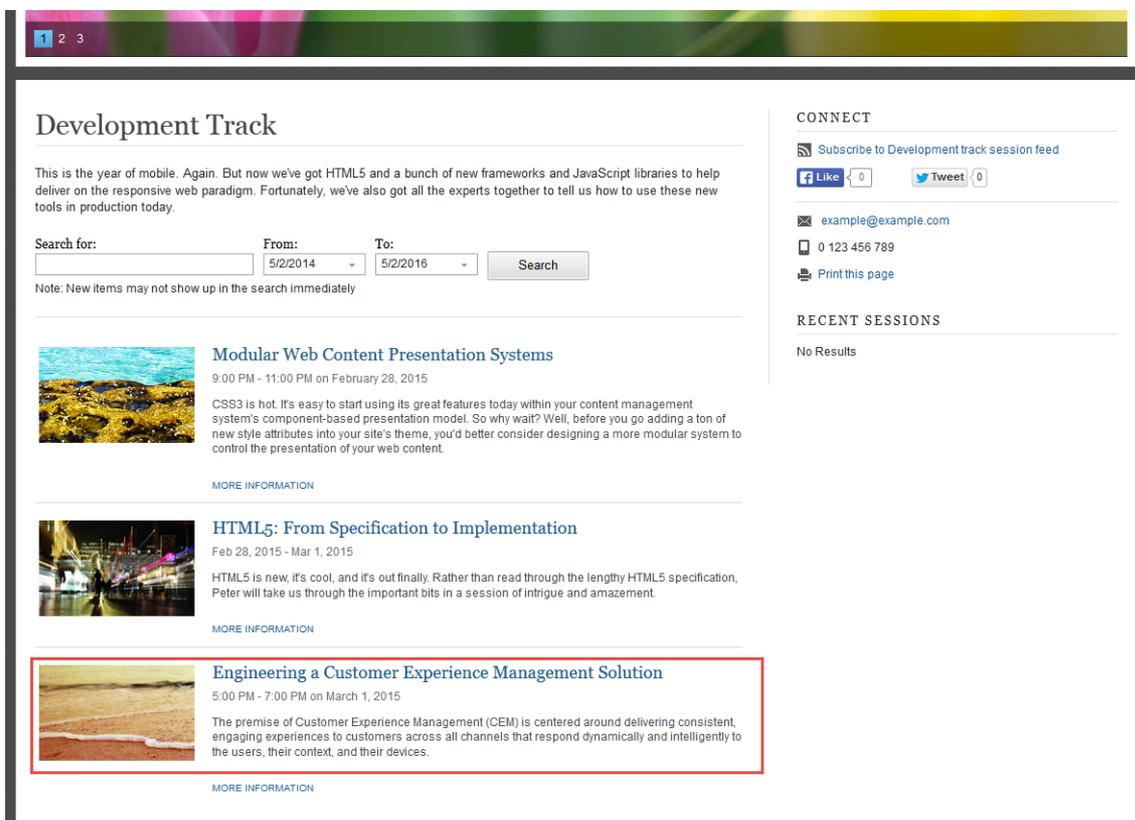
- 7. Now click on the **Development Track link** to see all the sessions in the Development track. Each session has been created using a page template, which allows common information common to each session, to be pre-populated, saving time.



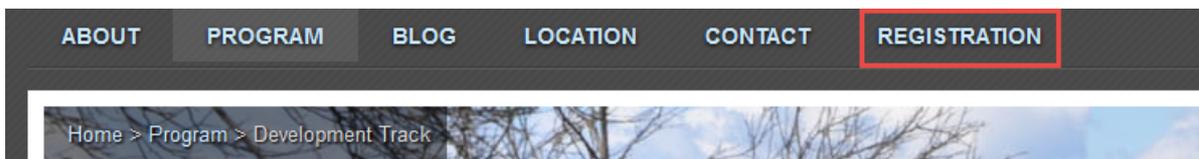
Engineering a Customer Experience Management Solution

EVENT DET
Start: 3/1/15, 5:
End: 3/1/15 7:0

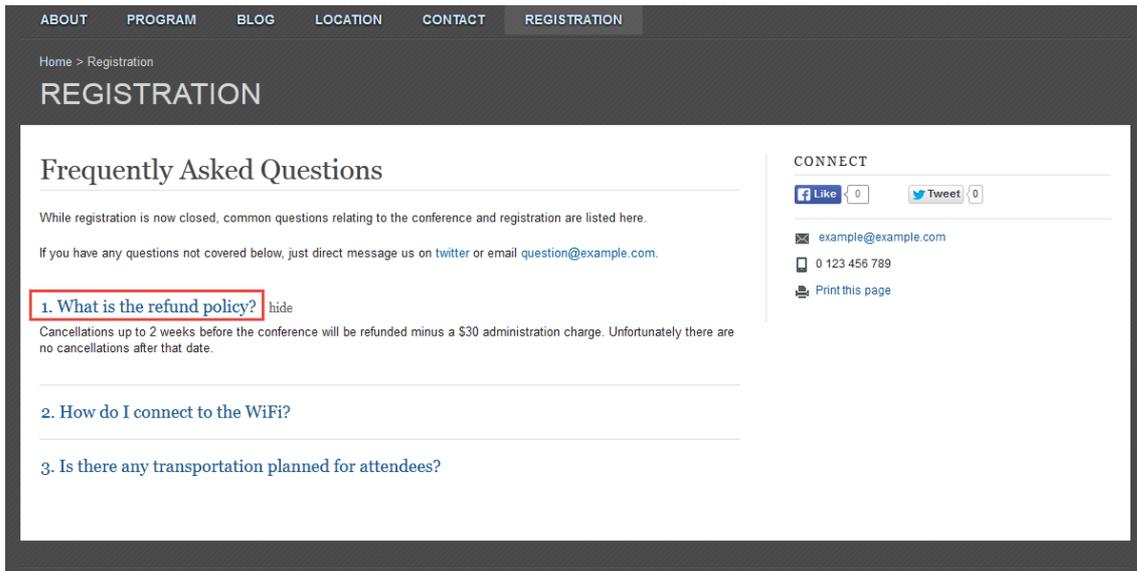
- 8. Notice the session you just looked at – Engineering a Customer Experience Management solution – appears with a different look and feel. in a list. Tip: If you don't see any content in the list, you may need to select an older date in the **From** field e.g. 1/1/2014.



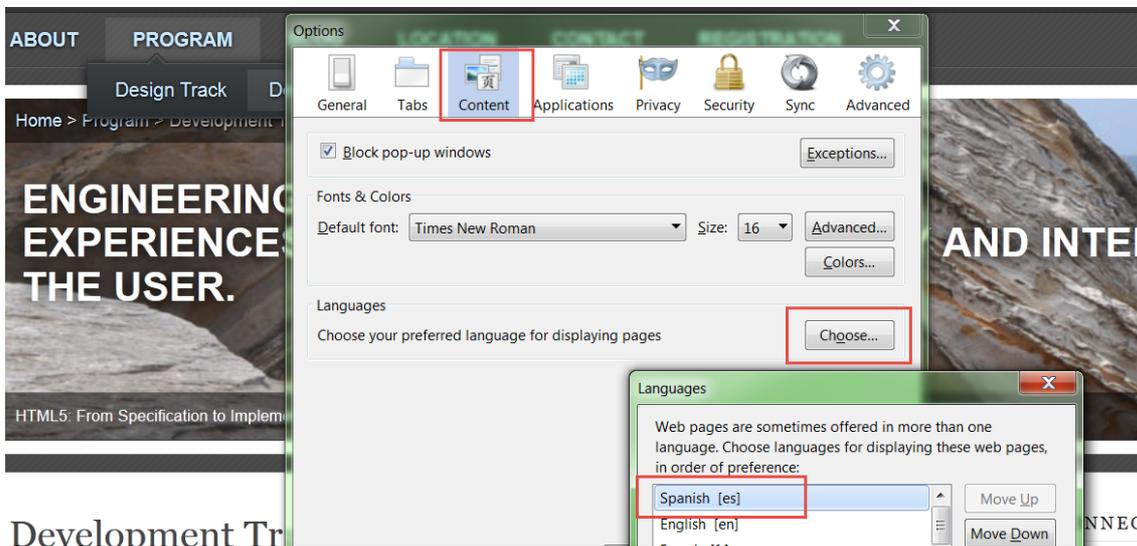
- 9. Now go the Registration page. Click on **Registration**.



10. The Registration page shows frequently asked questions about the conference. The FAQ Index/Detail template is used to create this page. To see the answer to a question, just click on the question text. For example, clicking “1. What is the refund policy?” displays the following:



11. Click the question text again to hide the answer and display just the list of FAQs. This demonstration site is multilingual, meaning you may change the preferred language of your web browser to Spanish, German, Chinese or Arabic-- you will notice that the whole site is available in these languages. To display the site in another language, change the content language of your browser. In Firefox, you can use **Tools – Options (or Edit – Preferences) – Content – Choose** your preferred language for displaying pages moved to the top, as shown (you may need to add another language first):



__12. Then you will see the same site displayed in the chosen language.



__13. Be sure to switch your preferred browser language back to English before proceeding to the next step.

This was a quick introduction to the CTC Demo demonstration conference site available with the IBM Digital Experience platform.

Appendix B Setting up the Digital Experience environment

This appendix explains how to set up your IBM Digital Experience installation to be able to run this lab yourself.

It assumes that the different parts for IBM Digital Experience, IBM WebSphere Portal, IBM Web Content Manager (WCM), IBM Forms Experience Builder (FEB), IBM Web Experience Factory (WEF), IBM Connections are installed and integrated.

The CTC Conference demonstration site is part of the WCM Content Template Catalog (CTC). You will find details on how to set this up here: http://www-01.ibm.com/support/knowledgecenter/SSHRKX_8.5.0/welcome/ctc_welcome.html. The segments for different devices allowing you to easily target content to Desktop, Smartphone and Tablets are configured following http://www-10.lotus.com/ldd/portalwiki.nsf/xpDocViewer.xsp?lookupName=V8+Update%3A+Supplemental+Documentation#action=openDocument&res_title=Example_Creating_a_segment_by_device_class_wp8001&content=pdcontent and with “Desktop User” added as Otherwise.

The Mobile Preview option can be configured using:

<https://greenhouse.lotus.com/plugins/plugincatalog.nsf/assetDetails.xsp?action=editDocument&documentId=BE1D7AA2A79761C485257CF900607A35>.

The Integration Examples site can be setup using out of the box capabilities.

Deploy the IBM Connections pages using the Social Rendering Templates from

<https://greenhouse.lotus.com/plugins/plugincatalog.nsf/assetDetails.xsp?action=editDocument&documentId=666D72234CA1D57685257CEE0050009A1> for older versions: IBM Web Experience Factory based portlets from <https://greenhouse.lotus.com/plugins/plugincatalog.nsf/assetDetails.xsp?action=editDocument&documentId=55AFF4A1D3D54DF185257CD3006014A4>.

The IBM Forms Experience Builder set of pages has the ready to use free Starter Packs forms for FEB deployed that can be found on http://www-10.lotus.com/ldd/lfwiki.nsf/dx/Forms_Experience_Builder_Starter_Packs.

You can also setup the Script Application examples that are provided on the Developer Center

<https://developer.ibm.com/digexp/samples-open-source/#> and in OpenNTF: <http://openntf.org/main.nsf/project.xsp?r=project/Script%20Portlet%20Samples%20for%20IBM%20WebSphere%20Portal>.

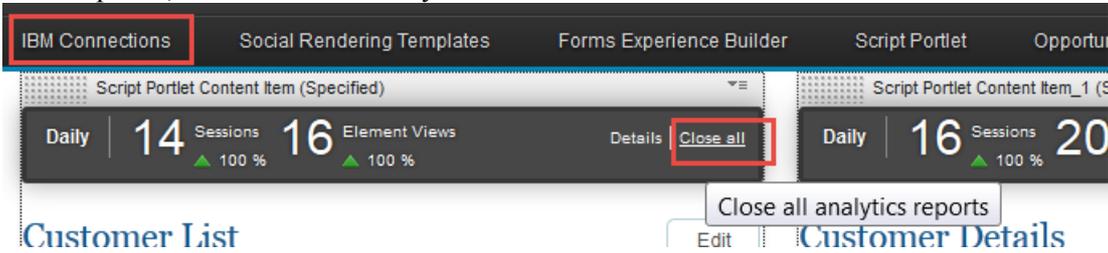
More examples may be obtained from the Samples and Download sections of the IBM Digital Experience Developer Center: <https://developer.ibm.com/digexp/>.

Appendix C More Application Integration examples

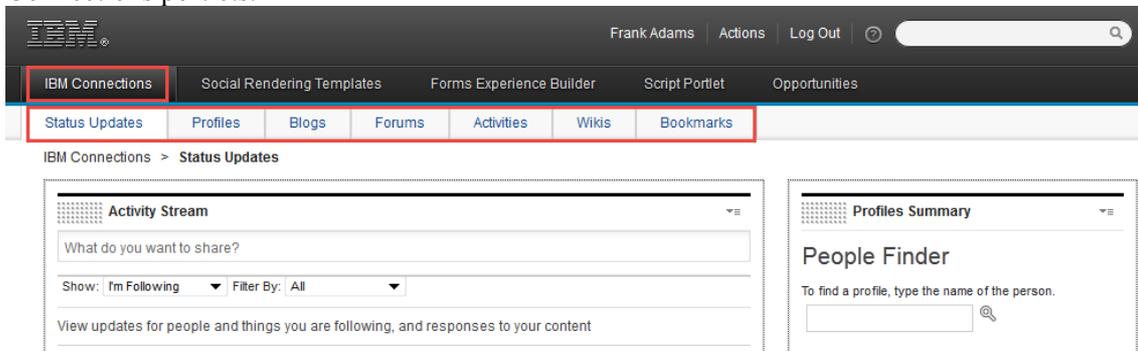
In this appendix, you may learn about a few other integration examples.

You will first find the standard IBM Connections integration, IBM Forms Experience Builder, and then a combination of IBM Forms Experience Builder and IBM Connections.

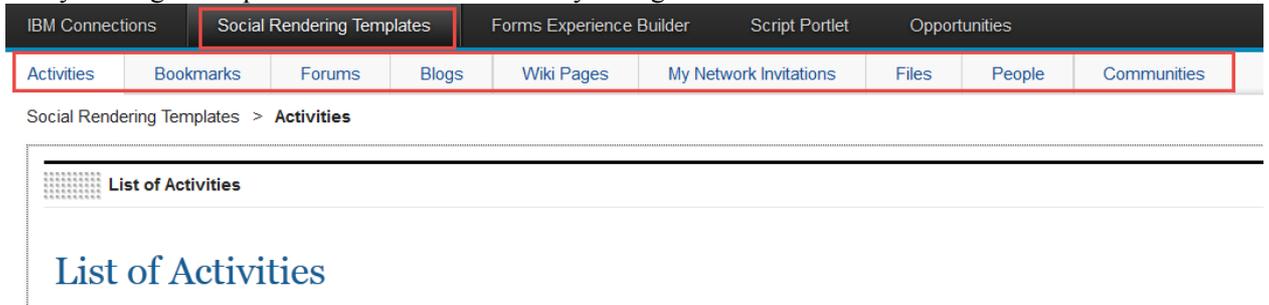
1. If still opened, first close the overlay. Click **Close All** and then select **IBM Connections**.



2. You see the **Activity Stream** portlet managing the status updates, and other out of the box Connections portlets.



3. Then go Social Rendering Templates. These are more out of the box portlets to integrate Connections into your Digital Experience. These can be easily changed in tool and feel.



4. Next go to **Forms Experience Builder**. This has the starter pack deployed. You may have a look at any of these ready to use and/or customize forms.

The screenshot shows the 'Forms Experience Builder' section of the IBM Connections interface. A red box highlights a grid of various forms available for use or customization. The forms listed include:

- IBM Forms Starter Pack Information
- Benefits Enrollment Form
- Business Conduct Guidelines
- Change Of Address
- Coffee Feedback
- Conference Evaluation
- Deal Tracking
- Direct Deposit Enrollment
- Employee Information Form
- Employee Position Change
- Employment Application
- First Aid Course Enrollment
- Hotel Inspection
- IT Satisfaction Survey
- Library Registration
- Meeting Feedback
- Printing Quotation
- Product Registration
- Safety Policy
- Travel Expense Approval
- Trouble Ticket
- Vacation Request
- Weekly Timesheet

Below the grid, there are bullet points describing the starter packs:

- Sample forms that accelerate solution construction for specific business needs.
 - Quick starting point with best in class capability.
 - Easy to learn (how to) form design techniques.
- Pre-built solutions for commonly used forms.
- Customers, Business Partners and IBM Services can customize and extend samples to fit their individual needs.

5. And finally go to **Opportunities**. This shows a Forms Experience Builder based Opportunities application and an IBM Connections Profiles portlet. You can filter down the opportunities list by Rep Name and Product line. Click on an opportunity in the list, eg. the one shown which has a Camping product line.

The screenshot shows the 'Opportunities' application. At the top, the 'Opportunities' portlet is highlighted with a red box. Below it is the 'Opportunity Report' section. There are two filter dropdowns: 'Filter by rep' and 'Filter by product line', both highlighted with red boxes. Below the filters is a table of deals in the tracking system. The 'Camping' row is highlighted with a red box. To the right of the table is a social network portlet showing status updates from Frank Adams and Heather Reeds.

Deals in the tracking system

Filter by rep: [Dropdown] Filter by product line: [Dropdown]

Click on record to see details. You can also update the record from the detail form.

Product Line	Deal Amount	Expected Close	Rep Name	Customer
Hiking	\$40,000.00	2/15/2013	Brian Febulous	Outdoor Living
Mountain Biking	\$110,000.00	2/22/2013	Joe Runner	Fat Tire
Camping	\$50,000.00	3/15/2013	Joe Runner	Everest Outfitters
Mountain Biking	\$100,000.00	2/22/2013	Mary Mountain	Paddle & Ski
Running	\$110,000.00	2/15/2013	Mary Mountain	Sun & Fun
Hiking	\$30,000.00	3/15/2013	Mary Mountain	Hill Country Hiker
Snow Sports	\$90,000.00	2/22/2013	Brian Febulous	Ski Shack
Climbing	\$55,000.00	3/15/2013	Joe Runner	Moody Mountain
Mountain Biking	\$81,000.00	2/22/2013	Brian Febulous	Bike-O-Rama
Running	\$120,000.00	2/15/2013	Brian Febulous	Western State Run
Camping	\$90,000.00	2/22/2013	Mary Mountain	Mega Sports

Total deal value for items in view \$876,000.00 Average deal size for items in view \$876,000.00

- 6. This will show you the details of the opportunity in the FEB application and any expert in Connections who is tagged with that product line, Camping in this example, sends the Product Line parameter to the Connections Profiles portlet as a filter parameter. You notice that the Profiles portlet now shows employees that are tagged with the Product Line information who act as an expert or contact for further information.

- 7. From here you can easily start collaborating with Heather. Click on her name Heather Reeds.

- 8. This gives you access to more information of her.

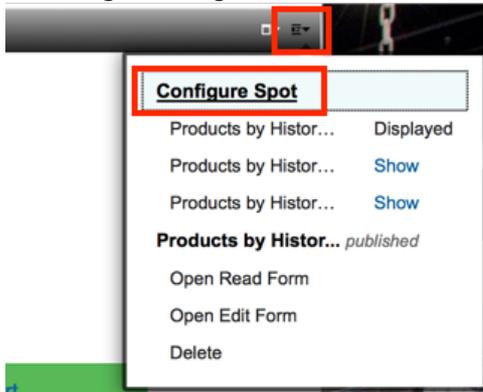
You have discovered few additional examples of integration on this platform. Additional labs may provide you more details on these and other topics around IBM Digital Experience.

Appendix D Corrections Needed for Targeted Content on your Home Page

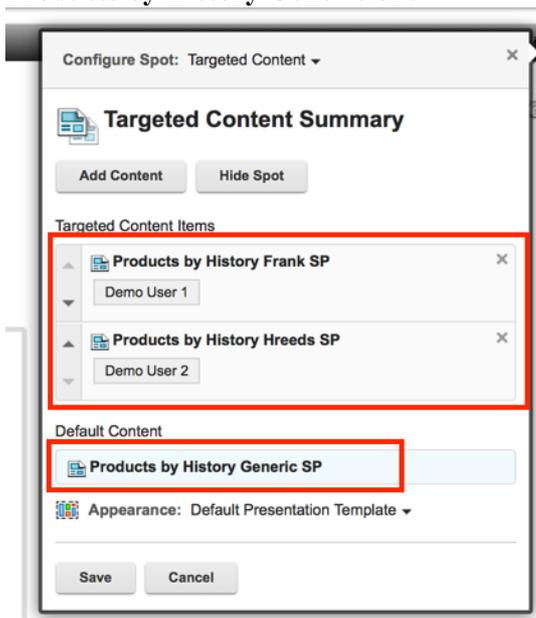
This appendix gives a short introduction to a few corrections that you need to put in place before editing all targeted content for your new site.

The content spots are not updated to point to your new copied entries. Therefore, you need to replace them all. On your home page these are used to manage you shopping history, special offers by region and shop by categories. This issue has been reported and should be resolved shortly.

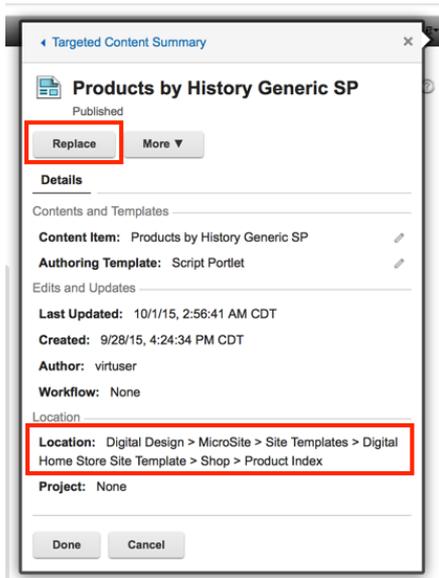
1. To change these, go to the edit mode and select Configure Spot for each of these portlets.



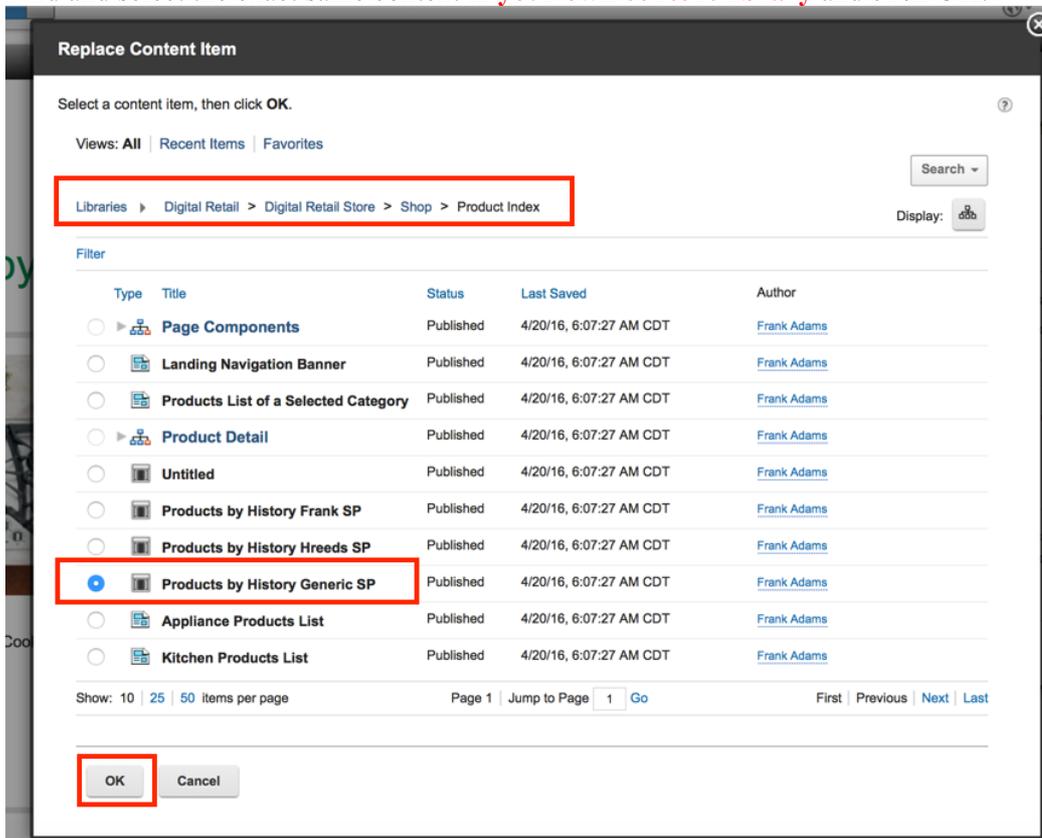
2. You need to change both default and targeted content items. Select the default content first, here **Products by History Generic SP**.



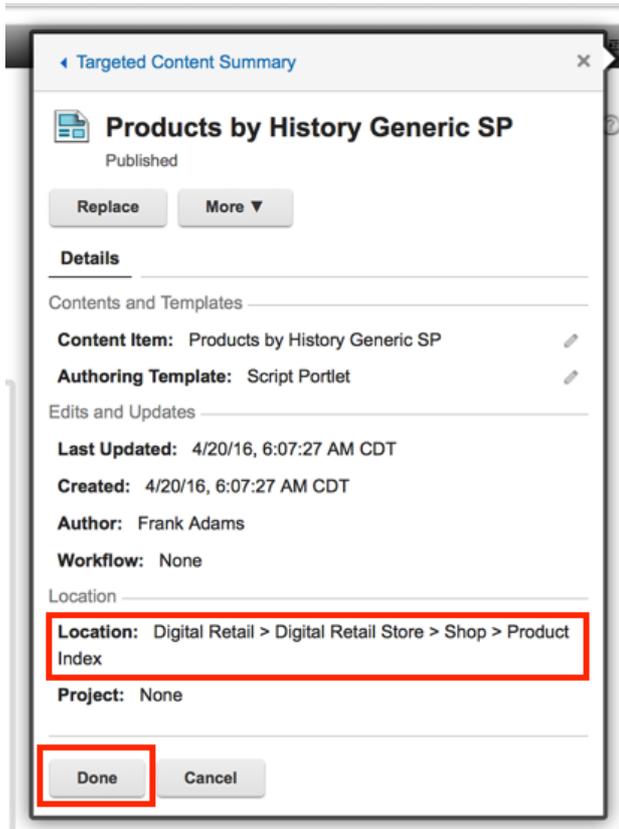
3. As you can see, this still points to the microsite content. Click **Replace** to replace it.



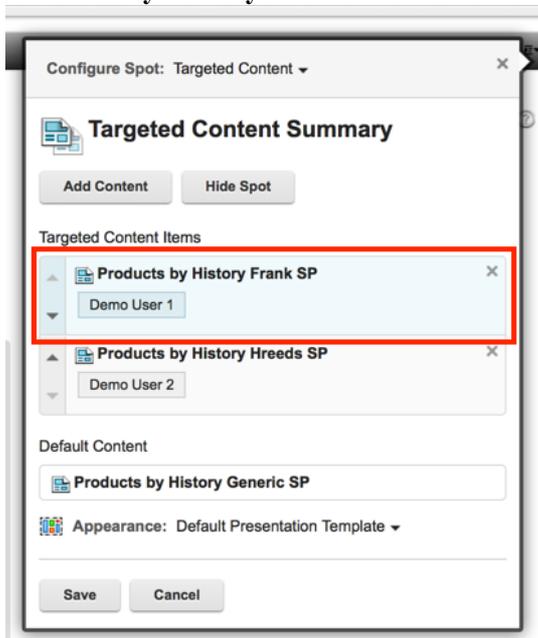
4. Find and select the exact same content in **your own content library** and click **OK**.



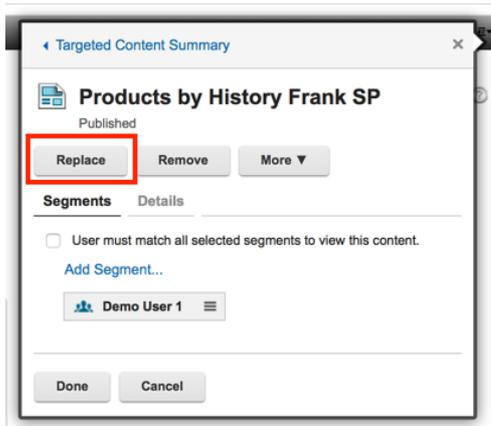
__5. Verify that the local is now correct and click **Done**.



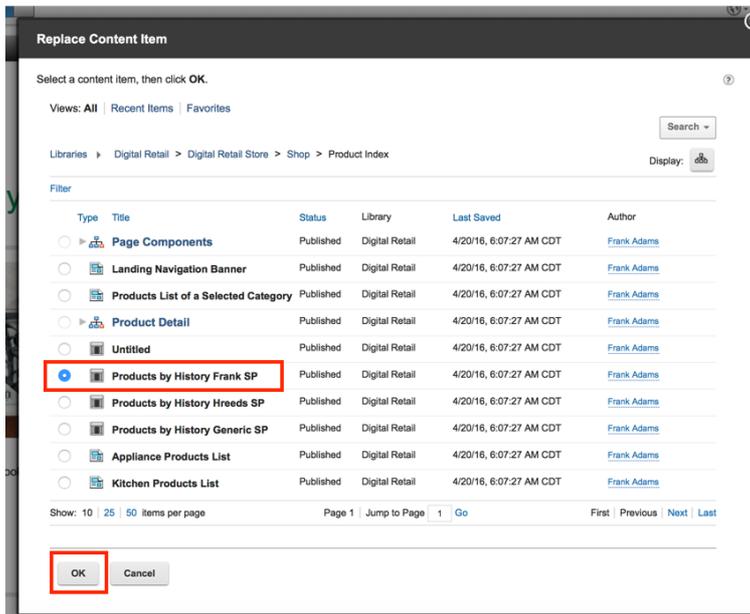
__6. As you can see, it shows the same. Now change each targeted content item. Start with the first. Click **Products by History Frank**.



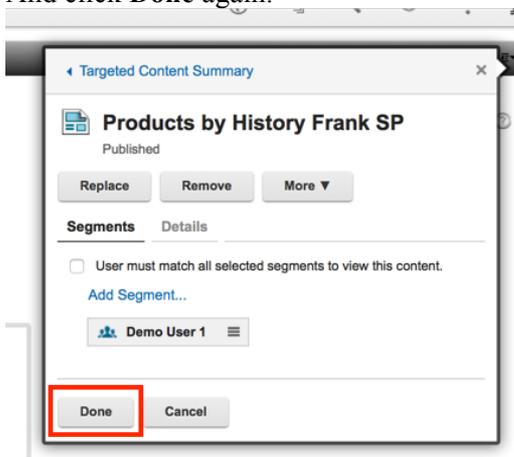
7. Click **Replace**.



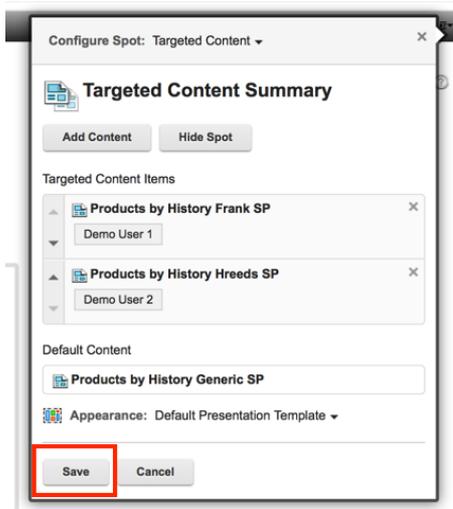
8. This brings you directly to the right site area now. Select the same content item, **Products by History Frank SP**. Then click OK.



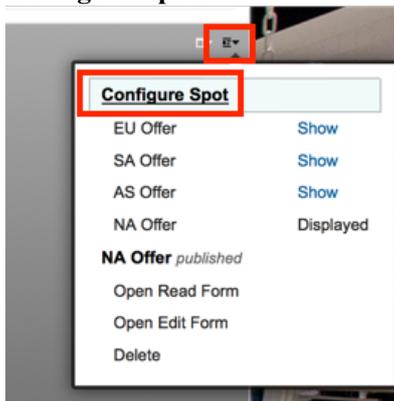
9. And click **Done** again.



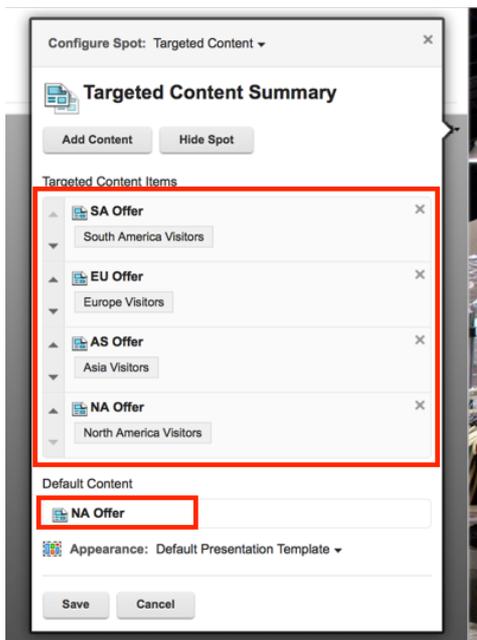
- 10. Now do the same with the other targeted content **Products by History Hreeds SP**. And once done, click **Save**.



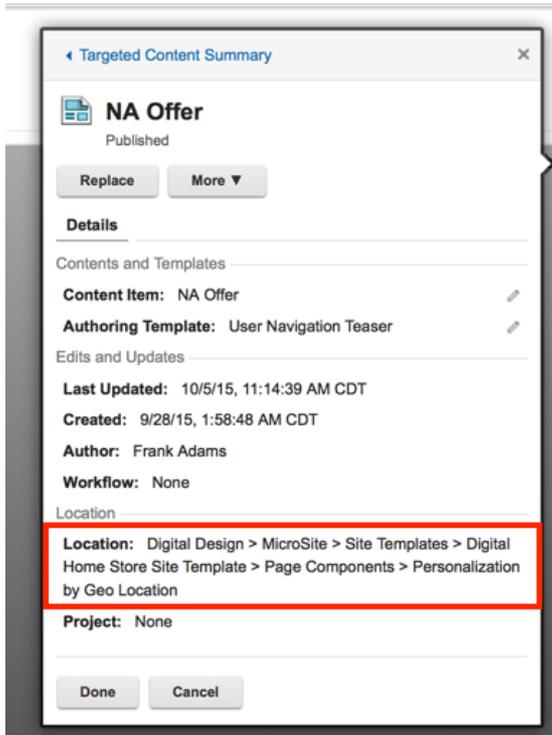
- 11. You will notice no changes. However, if you make changes to the content, it will be for your site only, and not for all future sites that reuse the microsites. Now do the same for the special offers. Click **Configure Spot**.



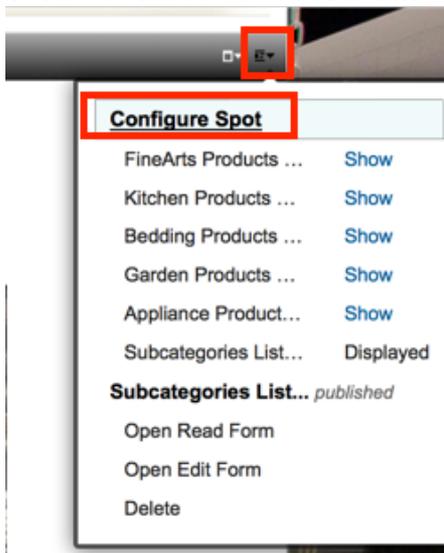
- 12. Change the default and targeted content again to point to the items in your own library. Click the default content **NA Offer** first.



- 13. Check that it points to the micro site. Follow the same steps to replace these by the same contents that have been copied into your own library.



- 14. And finally do the same for the **Shop by Categories** where your own items are under the **Shop** and **Show – Product Index** site areas.



Now you can change the content of these items again without altering the micro site which is used for any new site built on this template using the Site Builder.

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