

HDX-BU-200 Web Content Workflow Lab



Edition December 2024

Herbert Hilhorst – <u>herbert.hilhorst@hcl-software.com</u>

Table of Contents

Author(s)	3
Introduction	4
Prerequisites	5
Lab Overview	6
Part 1: Rose Creates a new Product and Submits for Approval	8
Part 2: Ethan Reviews the Product and Approves it	13
Part 3: Rose Updates the Product	18
Part 4: Albert uses Content Reporting to Extend the Expiration Date	22
Conclusion	27
Resources	28
Legal Statements	29
Disclaimers	30

Author(s)

This document was created by the following Subject Matter Expert:



Herbert Hilhorst Company: HCLSoftware

Bio

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

Contact: herbert.hilhorst@hcl-software.com

Introduction

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

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



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

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



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

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



Albert Dora, Marketing Manager in San Francisco (USA)

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

Prerequisites

- 1. Completion of <u>HDX-INTRO</u> and <u>HDX-BU-100</u> courses, including the labs
- 2. A DX server with DX Solution Modules <u>https://hclsofy.com/catalog/dx-solution-modules</u> deployed of HCL SoFy, as this gives you access to the Woodburn Bank site and workflow.
- Access to download the Lab Resources: In the same place where you have found this lab, you will find corresponding resources which you may download and unzip on your Desktop. This will help you run the lab more easily. You may later replace them with your own.

You will be using the following user IDs and passwords:

Purpose	User	Password
SoFy Login	Your official email id	Your password
SoFy Solution Console Login	sol-admin	<from sofy="" solution=""></from>
DX Login (Marketing Rep Rose Bozli)	sbotello	HCL-Dem0
DX Login (Content Chief Editor Ethan	eadams	HCL-Dem0
Adams)		
DX Login (Marketing Manager Albert	Adora	HCL-Dem0
Dora)		

Lab Overview

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

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

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



Part 2: Ethan Reviews the Product and Approves it

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

Web	Web Content Activity						
Show:	All	My Favorites	My Recent Items	My Drafts	My Pending Approvals		
Open	Open selected view in the Library Explorer						
	Withing	s BPM Connect Blo	od Monitor				
	Moved by	user Rose Bozli - Fron	n stage Draft to Review V	Voodburn Healthca	re Content / woodburnhealthcare / healthresources / products Today 9:13		
	Status is I	Draft Open Approv	ve Reject Preview				

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

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

Open Re	ead Forn	n						
Libraries > V	Libraries > Woodburn Healthcare Content > Content > woodburnhealthcare > healthresources > products > Withings BPM Connect Blood Monitor Withings BPM Connect Blood Monitor							
Preview	Link	Create Draft	Versions	View References	Close			
Content	Properties	Comments (1)						
Etha Goo	Content Properties Comments (1) Ethan Adams approved on 12/22/23, 11:27 AM Good product. All correct.							

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

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

Reporting 1	results found				Upd	ates	Update	Export
Search Crite	eria Expiry dat	e: From 12	22/2023, T o	12/31/202	24;		Viev	v Criteria
Title 个	Name	Loc	Status	Туре	Expi	Las	Own	A
₽ W	Withings	Wo	[> Р	Conte		UTC	cn	cn
			_	⊘ 1 item	updated su	ccessfully	/ View	×
Show rows: 5	i0 🔻 1-1 of	1					item	

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

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

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

DX Solution Module	25	
Sandbox Expires	minutes ()	HCL Digital Experience Business Solution Examples
Sandbox Links Demo Home Page	Open	HCL Digital Experience Solution Modules
Login ID Password	wpsadmin	HCL Digital Experience (DX) is the fastest way for Practitioners, Developers and IT t Content, Applications, and Processes. It empowers you to create, manage, and deliver to virtually all audiences with responsive content, targeted offers, seamlessly integrate
Woodburn Healthcare Home F	Page Open	across channels (web, mobile, hybrid mobile/web applications, and more). It is a web content manager and web portal server combined to provide a platform fo

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



3. Navigate to the **HEALTH RESOURCES** page. Here you see the current HIGHLIGHTED PRODUCTS. Now add your Withings BPM Connect blood monitor. Enable the **Edit Mode**.

<	Published Site 👻	Edit Mode: OFF Show Metadata: ON	•	ŵ : ^文 A English ▼ ₣	HCL (j
Ŧ		HEALTHCARE HOME	IND A DOCTOR COVERAGE & BENEFITS PHARMACY	LOG-OUT (+ Q	
		HEAL	TH RESOURCES		۵
		HEALTH AND WELLNESS	CONDITION-BASED CONTENT	HIGHLIGHTED PRODUCTS	
	•	We've got a huge library of great ideas and activities to keep you and your family happy and healthy.	Search our condition-based content to find helpful trips and approaches to manage your lifestyle.	Fitbit Charge 4 Fitness and Activity Tracker with Built- in GPS FreeStyle Libre 2: The next	
		HIGHLIGHTED HEALTH AND WELLNESS ARTICLES	HIGHLIGHTED CONDITION-BASED ARTICLES	generation of diabetes care.	_
				ResMed AirSense 10 One Drop Glucose Meter Covid-19 Booster Shots	G FEEDBACK
		Get the Whole Family Involved! Eating Healthy is Easier than you Think.	Diabetes: Know What to do A Simple Snore or Something Everyday. More?	ROT	
		When the whole family With a few tweaks to your engages it's hard to stop the shopping list, life is just better. fun.	These daily activities will help Diagnosing Sleep Apnea is you stay in front of your easy for some but more Diabetes. complex for others.		
		♥ ≪ ♥ ≪	♥ ≪ ≪	One Drop Glucose Meter	

4. You now have an option to create a new product. Click Create Product.

sonalized Hero Panel				
2	CONDITION-BASED		HIGHLIGHTED PRODUCTS	
	s Search our condition-based content to find helpful trips and approaches to manage your lifestyle.			
	Content Template	Card - CT	Fitbit Charge 4 Fitness	
llness	Title:	Condition-Based Content	and Activity Tracker	
Card	Description:	Condition Banner Card	FreeStyle Libre 2: The	
			,	

5. And enter the name of your new product **Withings BPM Connect Blood Monitor**. Then click **Create.**



HDX-BU-200 WEB CONTENT WORKFLOW LAB

6. You should see the detail page for your new product. Then, use the lab resources Withings BPM Connect.docx to set the title (Title), description (Description), by (Manufacturer), item # (Item Number), price and Cost to you (Member Price) for his product and update the Primary Image with the lab resource Withings BPM Connect.jpg, or use one of your own. Notice also the specific workflow related information in the meta-data. It shows it uses the Four stage workflow and is currently in draft. You may specify when you would to publish and expire the item. Leave the publish date and set the expire date to a year from now. It should look like below. Then submit your article for review so Ethan can review and approve.

Web Content Viewer (Cor	ntextual)		
Withings E	3PM Connect Blood Monitor	Configure Spot	
QUICK & EAST TO RE cuff arm measures s	EAD RESULTS with color-coded feedback on display case - this blood pressure systolic and diastolic. Ideal for individuals with high blood pressure.	Withings BPM Conne draf	t
ONE OF THE MOST / blood pressure moni products only	ACCURATE BLOOD PRESSURE MONITORS - FDA cleared portable automatic itor upper arm for easy at home arterial activity monitoring. fsa hsa approved	Eligible Open Read Form	
WI-FI & BLUETOOTH Health Mate app. Ea monitors.	I SYNC - The bp monitor for the arm automatically syncs data wireless to the sier than a manual blood pressure cuff. Great activity, health & wellness	Move to Next Stage	-
LONG LASTING REC months. built in batte health.	HARGEABLE BATTERY - This blood pressure monitors battery charge lasts 6 ery case and in-app battery monitor. Don't let short battery life stop your heart	Delete	
SHARE WITH YOUR I healthcare provider f cuffs for home use.	DOCTOR - Automatic blood pressure cuff easily email your reports to a from wrist blood pressure monitor via app (only iOS). Great blood pressure	Ang Systems B1 menta	
BY	Item #	Mighter Values	
Withings	B07SJV1HNR	Viole mar 138/85 mmilg >	
97 100% Covered by Wo	podburn HC	The second secon	
Cost to you:		BUY NOW	
25.1			
Content Template:	Product - CT		
Title:	Withings BPM Connect Blood Monitor		
Description: Document Status:	Draft		
Workflow:	Four stage workflow		
Publish Date:	Dec 22. 2023. 9:09:27 AM GMT		
Expiry Date:	Dec 23, 2024, 12:00:00 AM GMT		

7. Ignore what the page shows, as your content is in draft and you are working on the published site. If you were using a Project, your content would continue to show properly in draft. You'll learn more on this in the Project lesson. Also, you would typically use an e-mail action to inform your approvers on your new content, that would be part of the workflow. This is not set up here, as there is no mail server running on HCL SoFy. Now check how this looks like in the Content Composer. Open the site menu and select the **Practitioner Studio**.

		⊳	:	₹ _A	English 🔻
HEALTH	Demo Home				
	Woodburn Studio		ουτ	•	Q
	Practitioner Studio				
	Maadhuun Daala		_		

8. And go to Web Content. Click any of the Web Content options.



 Then select the Woodburn Healthcare Content library - Content – woodburnhealthcare – healthresources – products – Withings BPM Connect Blood Monitor. Notice its icon which is orange, meaning in draft.

Published Site -				: *A English • HCL (1)
\leftarrow Back Q : ×	Content Composer	Title		
Web Content	Impersonation •	Sleep Apnea Menu	articles ●	Withings BPM Connect Blo • :
Content Composer	□ 😹 woodburnhealthcare >	myaccount •	products >	Fitbit Charge 4 Fitness and Activ •
Q Authoring		Healthresources	Diabetes Content Menu	E LifeStyle Libre2
Content Reporting		pharmacy •	Health and Wellness Content M •	Covid-19 Booster Shots

10. You can now only view it. Notice it is still in draft. If you had it saved, instead of submitting for a review, you would be able to make updates here. Now view it. Click **View**.



11. Notice it is currently in the Review workflow stage, waiting for Ethan to approve. Log out as Rose.

Published Site 👻			٦	. ^{\$} A English ▼ HCL (j
\leftarrow Back	Q : ×	← 🕢 W → Read Only	🛑 Draft 🔻	More Cancel Save
Web Content Impersonate Turn on Information Mode		odburn Healthcare Content/woodburnhealthcare althresources/products	Properties	Workflow Document Status
Content Con	Log Out	Ivame	ج Washflow	Draft
Content Rep	orting	Display title		Four stage workflow
D Preview		Withings BPM Connect Blood Monitor	Comments	Current Workflow Stage
Web Content	t Libraries	Description		Next Workflow Stage
Syndicators		*Select Content Template		Publish
 (j) Feed Configu 	urations	Spotlight / Product - C1 *Select Location		12/22/2023 09:09 AM
Feed Jobs		Woodburn Healthcare Content /		Expire Date
 ♪ HCL Digital E	xperience	Elements	>>	12/23/2024 12:00 AM

Congratulations! You've created a new draft content product called Withings BPM Connect Blood Monitor using the Site Manager and have submitted it for review.

Part 2: Ethan Reviews the Product and Approves it

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

 Now log in as Ethan, a member of the content approvers team, to review and approve Rose's content. Click LOG-IN, enter User ID eadams and Password HCL-Dem0 and click LOG-IN.

peri	LOG-IN	×	
ence	eadams		
	Password		recording, download the lab and corresponding lab
ICL Digi	LOG-IN		m.

2. First check it out in the Content Composer. Open the site menu and click the **Practitioner Studio**.



3. And open Web Content. Click Web Content.



HDX-BU-200 WEB CONTENT WORKFLOW LAB

4. You may still use the Content Composer to view and approve the content. Select the Woodburn Healthcare Content library, Content, woodburnhealth, healthresources, products, Whithings BPM Connect Blood Monitor and View.

Publish	ned Site 🔻					:	≭ _A English ▼	HCL	í
\leftarrow	Back Q : ×	Content Composer	tle)		
Web	Content	products >		Withings BPM Connect Blood Monitor	Details				
	Content Composer	Diabetes Content Menu	2	Fitbit Charge 4 Fitness and Activ					
Q	Authoring	Health and Wellness Content M		LifeStyle Libre2					
Ē	Content Reporting	Highlighted Products		Covid-19 Booster Shots					
\bigcirc	Preview	Condition Record Content	=	Sign-up for Mindfulness Sessions					
	Web Content Libraries	Condition-based Content		ResMed AirSense 10	- F	0	2 =		
D	Syndicators	Health and Wellness			Name	View	Edit Overview		
റ്റ	Subscribers	Health Resources Hero		One Drop Glucose Meter	Withings	BPM Co	onnect Blood Mon	itor	

5. You can view the content and have the options to reject or accept/publish.

Withings BPM Connect Blood The ad Or	ly 🛛 🗧 Draft 🔺	More 🔻 Cancel	Save
Woodburn Healthcare Content/woodburnhealthcare/healthresources/products	Reject Publish	Workflow	
* Name	View workflow	Document Status	Actions
Withings BPM Connect Blood Monitor	Workflow	*Current Workflow	

6. However, instead use the Web Content Authoring. This allows an easier view of the all items that may need your approval.

Publishe	d Site 🔻			
← I	Back Q : ×	Content Composer		
Web	Content		Blog Solo Template v70	
	Content Composer		Blog Template v70	
Q	Authoring		Commerce	
-	Content Reporting		Demo Home	
\bigcirc	Preview		Discover	
	Web Content Libraries		Domino	
	Syndicators			
0			EventConfigs	

HDX-BU-200 WEB CONTENT WORKFLOW LAB

7. This gives you access to your Web Content Home Page. This helps you simplifying managing content in the back office. Notice the new Withings BPM Connect Blood Monitor content under the Web Content Activity. You have dedicated views to see all your favorites, recent items, drafts and pending approvals. Have a look at all content you need to approve. Click My Pending Approvals.

My Web Content Home Page Create and manage content for the site using the links below. Use the library home page. New <u>Open the Library Explorer</u>	explorer to add favorite templates and locations so that they appear
Create Content	
My Favorites: No favorite templates available. Use the Library Explorer to select some favorite templates. Select from all templates Open Views in the Library Explorer	My Recents: No recently used templates available.
My Favorite Locations: No favorite locations available. Use the Library Explorer to select some favorite locations. Web Content Activity	
Show: <u>All</u> My Favorites My Recent Items My Drafts Open selected view in the Library Explorer Withings BPM Connect Blood Monitor Moved by user Rose Bozil - From stage Draft to Review Woodburn Healthcare of Status is Draft Open Preview	My Pending Approvals Content / woodburnhealthcare / healthresources / products Today 9:13:2

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

Web Content Activity

Show:	All	My Favorites	My Recent Items	My Drafts	My Pending Approvals						
Open s	Open selected view in the Library Explorer										
	Withings BPM Connect Blood Monitor										
	Moved by	y user Rose Bozli - Fron	n stage Draft <u>to Review</u> / _V	Voodburn Healthca	are Content / woodburnhealthcare / healthresources / products Today 9):13::					
	Status is	Draft Open Appro	ve Reject Preview								

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

Withings BF	M Con	nect Blood	Monitor			
QUICK & EAST TO REAL this blood pressure cuf individuals with high blo	RESULTS with arm measures ood pressure.	color-coded feedback s systolic and diastolic	: on display case - . Ideal for			
ONE OF THE MOST AC portable automatic blo arterial activity monitor	CURATE BLOOD od pressure mo ing. fsa hsa app) PRESSURE MONITOR nitor upper arm for ea proved products only	RS - FDA cleared sy at home	0	FSA Eligible	
WI-FI & BLUETOOTH SY data wireless to the He cuff. Great activity, hea	NC - The bp mo alth Mate app. I th & wellness n	onitor for the arm auto Easier than a manual b nonitors.	matically syncs lood pressure			A BARNAR AND ARESSARE
LONG LASTING RECHA battery charge lasts 6 r monitor. Don't let short	RGEABLE BATT nonths. built in battery life stop	FERY - This blood press battery case and in-ap o your heart health.	sure monitors p battery	WITHINGS		
SHARE WITH YOUR DO your reports to a health app (only iOS). Great bl	CTOR - Automa care provider fr pod pressure ci	tic blood pressure cuf om wrist blood pressu uffs for home use.	f easily email re monitor via	Sec.	Arg. 127 Algebrard Mighter of	Vinsile Are Dissolution mm/g 81 mm/g
BY <u>Withings</u>		Item # B07SJV1HNR			THE OF CAR	Month Year
97						
100% Covered by Wood	burn HC				BUY NOW	
Cost to you: 25.1						

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



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

Enter a comment	_
Enter comment here:	
Good product. All correct.	
ι	
OK Cancel	

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

		:	×A	Englis
	Demo Home			
"Withings BPM Connect Blood Monitor" has been approved	Woodburn Studio			×
	Practitioner Studio			
My Web Content Home Page	Woodburn Bank		0	
Create and manage content for the site using the links below. Use the library explorer to add favorite t home page.	Woodburn Healthcare	on your		
New - Open the Library Explorer	Woodburn Stores			
	Rainbow			
Create Content		 _		
Any Favorites: My Recents: No favorite templates available. Use the Library Explorer to select some favorite mplates. Select from all templates	ates available.			
Open Views in the Library Explorer				
Vy Favorite Locations: No favorite locations available. Use the Library Explorer to select some favorite ocations. Web Content Activity				
Show: All My Favorites My Recent Items My Drafts <u>My Pending Approvals</u>	<u>l</u>	 Display		F
Open selected view in the Library Explorer				
There are no items of this type.				

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



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

Part 3: Rose Updates the Product

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

1. Login a Rose. Click LOG-IN, enter User ID rbozli and Password HCL-Dem0 and click LOG-IN.



2. Then navigate to the **HEALTH RESOURCES** page and select the **Withings BPM Connect Blood Monitor** product.



3. Then enable the **Edit Mode**. Notice that you typically would work with a project. In that case Rose would simply use make the changes directly in the page and this would automatically create a draft. As you are now working on a published site, you need to use form. Open the **Content Menu** and click **Open Read Form**.

<	Published Site 👻 Edit Mode:	ON Show Metadata: ON ON	⊡ : 文 _A English -
Ŧ		CODBURN HOME FIND A DOCTOR COVERAGE & BENEFITS EALTHCARE PHARMACY HEALTH RESOURCES MY ACCOUNT	LOG-OUT (+ Q
		Web Content Viewer (Contextual) Withings BPM Connect Configure 1	■= ✓ ,
		Blood Monitor Withings	BPM Conne published
		QUICK & EAST TO READ RESULTS with color- coded feedback on display case this blood pressure cuff arm measures systolic and diastolic. Ideal for individuals with high blood pressure.	ad Form

4. First have a look at the comment that Ethan, the approver added. Click **Comments**.

	Open Read	d Forn	n					
Libraries > Woodburn Healthcare Content > Content > woodburnhealthcare > healthresources > products > Withings BPM Connect Blood Monitor								
l	Status -	Published Link	I Last modified T Create Draft	oday 10:27:40 Versions	AM GMT by Rose Bozi	Created b	by Rose Bozli	
	Content P	roperties	Comments (1)			-	
	Name:							

5. You cannot make changes to this published version. Therefore, you first need to create a new draft. Click **Create Draft.**

	Open Re	ead Forn	n							
	Libraries > Woodburn Healthcare Content > Content > woodburnhealthcare > healthresources > products > Withings BPM Connect Blood Monitor Withings BPM Connect Blood Monitor Status - Published Last modified Today 10:27:40 AM GMT by Rose Bozli Created by Rose Bozli									
l	Preview	Link	Create Draft	Versions	View References	Close]			
l	Content	Properties	Comments (1)							
I	Ethan Adams approved on 12/22/23, 11:27 AM Good product. All correct.									

6. Now you can edit the new draft. Click Edit

Open Read Form	×
Draft for "Withings BPM Connect Blood Monitor" has been created.	×
Libraries > Woodburn Healthcare Content > Content > woodburnhealthcare > healthresources > products > Withings BPM Connect Blood More Withings BPM Connect Blood Monitor Status - Draft Last modified Today 10:51:31 AM GMT by Rose Bozii Created by Rose Bozii	nítor
Edit Add To Project Preview Submit for Review More - Close	
Content Properties Comments (1)	I

7. Then update the title and add – New and submit it for review again. Click Save and Submit for Review.

Open Read Form	1					
Libraries > Woodburn Heal	thcare Content > Content > V	woodburnhealthcar	re > healthres	ources > produ	icts > Withings	s BPM Connect Blood Monitor
Status - Draft Las	at modified Today 10:57:41 AN	I GMT by Rose B	ozli Created	by Rose Bozli		
Save and Close 👻	Add To Project Read	Preview	More -	Close		
Save						
Save and Read	nents (1)					
Save As						
Save and Submit for	Review					
Display title: O Localiza	Save and Submit for Review					
Witnings BPM Connect E	liood Monitor					
Description: Localization	IS					
		4				
		111.				
▼ Title						
Title						
Withings BPM Connect E	lood Moniter - New					

8. And close it. Click Close.

Open Read Form
 Moved "Withings BPM Connect Blood Monitor" to the next stage. "Withings BPM Connect Blood Monitor" was saved.
Libraries > Woodburn Healthcare Content > Content > woodburnhealthcare > healthresources > products > Withings BPM Connect Blood Monitor Withings BPM Connect Blood Monitor
Preview Link Go to Published View References Close

9. Notice that you still the currently published version of your product. Now log out as Rose.



10. Then repeat part 2 with Ethan to approve this new version. It should show with the updated title.



Congratulations, you have successfully created a new version of the **Wealth Management** article and submitted it for review, all while keeping the original text in place until the updated article gets approved.

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

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

1. Now log in as Albert, a marketing manager with a site manager role and go to the Content Reporting. Click **LOG-IN**, enter **User ID adora** and **Password HCL-Dem0** and click **LOG-IN**.



2. Open the site menu and click Practitioner Studio.



3. Then go to web content. Click Web Content.

Publish	ned Site 🔻					D i 🛪	English - HCL (j
Ţ	Albert Dora	Q:×		Digital Expe	erience	• -	
ඛ	Home			9			
>	Sites	~	HCL Digital Experience e manage, and deliver eng	mpowers you to create, aging omnichannel digital			
₿	Web Content	>	customer experiences to	virtually all audiences.			
~	Digital Assets	>	Watch the demo (>)	Get started \rightarrow		2 •	
	Site Templates	>					
\diamond	Themes	>	Practitioner Studio				
$\stackrel{\circ}{\sim}$	Personalization	>					
?	Help Center		Web Content	Digital Assets	Site Templates	Themes	Personalization
Z	Support						

4. And go to Content Reporting. Click Content Reporting.

\leftarrow	Back Q :	×	Conte	ent Composer
Web	Content			Blog Solo Template v70
	Content Composer			Blog Template v70
Q	Authoring			Commerce
Ē	Content Reporting			Demo Home
\bigcirc	Preview			Discover
	Web Content Libraries			Domino
\mathbf{r}	Syndicators			FuentConfige

Now select all contents that are planned to expire in the next year. Under Criteria, select
 Expiry Date and select a date range from today to a bit more than a year from today. In your environment, you may need to search for a date further in the future. Click Search.

Publish	ed Site 🔻		di se	文 _A English ▼	hcl (j
\leftarrow	Back Q : ×	Reporting			Updates
Web	Content	Search Criteria			
	Content Composer	Criteria From	白	To	A
Q	Authoring				
Ē	Content Reporting	+ Add			
\bigcirc	Preview			Cancel	lear Search

6. You see the product that was created by Rose and approved by Ethan. Click **Update**.

Repo	orting 1 results fo	ound					Upd	ates Update	Export
Sear	ch Criteria E	xpiry date: From 12/22/20	023, To 12/31/202	24;					View Criteria
Title	\uparrow	Name	Location	Status	Туре	Expires on	Last modi	Owners	Authors
	Withings	Withings BPM Co	Woodbur	Publ	Content		UTC	cn=Rose	cn=Rose

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

Update items		Critorio To 12	×
▲ Updates will only categories, and in	be applied to content items tems with edit access. Only	s, site areas, authoring ten items with a workflow will	nplates, components, be included.
Select action to apply t	to all items matching the se	t criteria.	
Property	Change to:	_	
Expiry date	▼ 12/31/2025	Ë	
		Cancel	Clear Update
3 Syndicators			

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

Confirm update		ہ ×
The following updates will be applied to 1 item from set criteria. • Update expiry date to 12/31/2025 Do you want to proceed with update?		
	Cancel	Update

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



HDX-BU-200 WEB CONTENT WORKFLOW LAB

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

Reporting 1	results found				Upd	ates	Jpdate	Export
Search Crite	ria Expiry dat	e: From 12	/22/2023, T o	12/31/202	24;		View	Criteria
Γitle ↑	Name	Loc	Status	Туре	Expi	Las	Own	A
₽ W	Withings	Wo	[ђ Р	Conte		UTC	cn	cn
			_					
			_	⊘ 1 item	updated su	ccessfully	View item	×
Show rows: 5	0 🔻 1-1 of	1						

11. And click the edit icon.

	Search Criteria	Expiry date: From 12/22/2	023. View Criteria
1 item updated (0 failed)			×
Update expiry date to			
Requested by: Albert Dora			
Title 🛧 Item ty	pe Update st	atus	Created by
Withings BPM Conne 🖉 Content	ОК		Rose Bozli
Show rows: 25 × 1-1 of 1		< < Page: 1	of 1 > >
Gynaloatora			

HDX-BU-200 WEB CONTENT WORKFLOW LAB

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

Libraries > Woodburn Healthcare Content > Content > woodburnhealthcare > healthresources > products > Withings BPM Connect Blood Monitor
Withings BPM Connect Blood Monitor Katus - Published Last modified Today 11:55:44 AM GMT by Albert Dora Created by Rose Bozli
Save and Close - Read Preview Apply Authoring Template More - Close
Content Properties Comments (2)
Type: Content
Location: Woodburn Healthcare Content / woodburnhealthcare / healthresources / products / Withings BPM Connect Blood Monitor
Authors: Add Authors Rose Bozli X
Owners: Add Owners Rose Bozli ×
▶ 品 Content Properties
Profile
▶ I Profile ▼
 Profile & Workflow Document Status: Published
 ▶ III Profile ▼ Spotlight / Four stage workflow
 ▶ III Profile ▼
 ▶ I Profile ▼ So Workflow Document Status: Published *Current Workflow: Select Workflow ▼ Spotlight / Four stage workflow Current Workflow Stage: Spotlight / Publish Next Workflow Stage: Spotlight / Publish Next Workflow Stage: Spotlight / Expire
 ▶ Image: Profile ▼ Some Workflow Document Status: Published *Current Workflow: Select Workflow ▼ Spotlight / Four stage workflow Current Workflow Stage: Spotlight / Publish Next Workflow Stage: Spotlight / Expire Joint approval None
 ▶ III Profile ✓ So Workflow Document Status: Published *Current Workflow: Select Workflow ▼ Spotlight / Four stage workflow Current Workflow Stage: Spotlight / Publish Next Workflow Stage: Spotlight / Expire Joint approval
 Profile Workflow Document Status: Published *Current Workflow: Select Workflow Spotlight / Four stage workflow Current Workflow Stage: Spotlight / Publish Next Workflow Stage: Spotlight / Publish Next Workflow Stage: Spotlight / Expire Joint approval None Publish Date: 12/22/2023
 ▶ IE Profile ▼

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

Conclusion

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

Resources

Refer to the following resources to learn more:

- HCL Digital Experience Home <u>https://hclsw.co/dx</u>
- HCL Digital Experience on HCL SoFy https://hclsofy.com/
- HCL Software https://hclsw.co/software
- HCL Product Support <u>https://hclsw.co/product-support</u>
- HCL DX Product Documentation https://hclsw.co/dx-product-documentation
- HCL DX Support Q&A Forum https://hclsw.co/dx-support-forum
- HCL DX Video Playlist on YouTube https://hclsw.co/dx-video-playlist
- HCL DX Product Ideas https://hclsw.co/dx-ideas
- HCL DX Product Demos https://hclsw.co/dx-product-demo
- HCL DX Did You Know? Videos https://hclsw.co/dx-dyk-videos
- HCL DX GitHub https://hclsw.co/dx-github
- HCL DX Web Developer Toolkit <u>https://github.com/HCL-TECH-SOFTWARE/WebDevToolkitForDx</u>

Legal Statements

This edition applies to version 9.5, release 221 of HCL Digital Experience and to all subsequent releases and modifications until otherwise indicated in new editions. It uses the HCL Digital Experience Solution Modules with additional resources in HCL SoFy.

When you send information to HCL Technologies Ltd., you grant HCL Technologies Ltd. a nonexclusive right to use or distribute the information in any way it believes appropriate without incurring any obligation to you.

©2024 Copyright HCL Technologies Ltd and others. All rights reserved.

Note to U.S. Government Users — Documentation related to restricted rights — Use, duplication or disclosure is subject to restrictions set forth in GSA ADP Schedule Contract with HCL Technologies Ltd.

Disclaimers

This report is subject to the HCL Terms of Use (<u>https://www.hcl.com/terms-of-use</u>) and the following disclaimers:

The information contained in this report is provided for informational purposes only. While efforts were made to verify the completeness and accuracy of the information contained in this publication, it is provided AS IS without warranty of any kind, express or implied, including but not limited to the implied warranties of merchantability, non-infringement, and fitness for a particular purpose. In addition, this information is based on HCL's current product plans and strategy, which are subject to change by HCL without notice. HCL shall not be responsible for any direct, indirect, incidental, consequential, special or other damages arising out of the use of, or otherwise related to, this report or any other materials. Nothing contained in this publication is intended to, nor shall have the effect of, creating any warranties or representations from HCL or its suppliers or licensors, or altering the terms and conditions of the applicable license agreement governing the use of HCL software.

References in this report to HCL products, programs, or services do not imply that they will be available in all countries in which HCL operates. Product release dates and/or capabilities referenced in this presentation may change at any time at HCL's sole discretion based on market opportunities or other factors, and are not intended to be a commitment to future product or feature availability in any way. The underlying database used to support these reports is refreshed on a weekly basis. Discrepancies found between reports generated using this web tool and other HCL documentation sources may or may not be attributed to different publish and refresh cycles for this tool and other sources. Nothing contained in this report is intended to, nor shall have the effect of, stating.

or implying that any activities undertaken by you will result in any specific sales, revenue growth, savings or other results. You assume sole responsibility for any results you obtain or decisions you make as a result of this report. Notwithstanding the HCL Terms of Use (<u>https://www.hcl.com/terms-of-use</u>), users of this site are permitted to copy and save the reports generated from this tool for such users' own internal business purpose. No other use shall be permitted.