Create Content Review and Publication Processes with Liferay DXP

Exercises Script

# Exercise 1: Slides

Slide 14:

In this Exercise, we’ll Create Workflow Definitions to use on the Marvin Robotics platform.

Slide 15:

We have the following Objectives for this exercise. We will:

Create a Workflow definition with the Kaleo Designer

Activate the Workflow and go through a review process

Slide 16:

The steps we will follow for this exercise are to:

Create a New Workflow with Kaleo Designer

Add the Review and Update Task Nodes

Connect All Nodes with Transitions

Name the New Transitions

Set the Assignments for the Review Tasks

Set Notifications for Tasks

And, add Timers to the Tasks

Slide 17:

Additionally, we will:

Assign a User to the Review Roles

Activate the Marketing Content Review Workflow

Add a Web Content Article to be Reviewed

And, go through the Workflow Process

Slide 18:

We also have two bonus exercises which we won’t cover in this video, but you can complete them on your own. These are:

Add a few more lines to the New Products January 2022 Web Content Article. Resubmit the article and go through the Marketing Content Workflow again, this time Approving it at both the Manager Review and the Final Review.

Create another Workflow. Use Fork and Join nodes to allow two kinds of Review, Copyedit and Content, at the same time.

# Exercise 1: Content

Part 1:

As usual, we’re signed in as our Marvin Robotics Administrator.

To create our Workflow, we’ll first open the Global Menu and go to Applications > Workflow > Process Builder.

Click the *Add* button to add a new Workflow.

And now you can see we are in the Kaleo Designer.

We’ll give this Workflow a title, “Marketing Content Review,” and then begin creating our process.

In our editor, click the connector, which is the line between the StartNode and EndNode. Once it’s highlighted, we can delete by simply pressing Delete on our keyboard.

Click OK in the pop-up.

We’ll also rearrange the Start and End nodes so we can better see our process. We’ll drag the StartNode to the left and the EndNode to the right.

Next, we’ll rename the nodes. Click the StartNode to open the Properties tab. Double-click the Name value and type “Submitted” for the Name. Click the *Save* button.

We’ll do the same thing for the EndNode. Click to open the Properties tab. Then, double-click the Name value and type “Approved” for the Name.

Click the *Save* button.

Part 2:

Next, we need to add task nodes to our process. For this process we’ll add three task nodes, two for Review and one for Updates.

Click the Nodes tab to see all available nodes.

Drag a Task node to the right of the StartNode, and then click the new node to open the *Properties*. Double-click the Name value in the Properties tab and type “Manager Review.” Click *Save*.

Click the Nodes tab. Drag another Task node into the editor between the Manager Review and EndNode. Click it to open the Properties tab. Double-click the Name value and type “Final Review.” Click *Save*.

Go back to the Nodes tab and drag a third Task node to the top left of the editor above the StartNode and Manager Review. Click the new node and double-click the Name value in the Properties tab. Type “Update Content” as the *Name* and click *Save*.

Part 3:

Now that we have all of our Task nodes, we need to connect them to establish the correct Review process order.

To do this, we’ll drag transition arrows between each node. This is done by placing the cursor at the edge of the starting node until you see a thin plus sign. So, we’ll start on our Submitted node. Once you see the plus sign, click and drag the arrow to the next node, the Manager Review Task. When you see an orange circle on the second node, that means the connection can be completed.

We’ll repeat these steps to connect the rest of the nodes.

So, drag a Transition arrow from the Manager Review Task up to the Update Content Task. This will be our Reject arrow. Drag another arrow from Update Content to Manager Review for the Resubmission.

Next, drag an arrow from Manager Review to Final Review. Then, drag an arrow from Final Review to Update Content, which will represent the content being rejected.

Lastly, drag an arrow from Final Review to Approved to represent the final approval of an item.

Part 4:

Now that all the Transitions have been added, we’ll go through and name each connector.

Click the first Transition between Submitted and Manager Review to open the Properties tab. Double-click the Name value and type “Submit for Review.” Click *Save*.

We’ll follow the same process for each connector. So next, click the connector going from Manager Review to Update Content. Double-click the Name value and type “Reject.” Click *Save*.

Click the Transition going from Update Content back to Manager Review. Double-click the Name value. Type “Resubmit” and click *Save*.

Select the Transition between Manager Review and Final Review and double-click the Name value. Type “Initial Approval” and click *Save*.

Click the Transition going from Final Review to Update Content. Double-click the Name value and type “Reject.” Click *Save.*

Finally, click the last Transition from Final Review to Approved. Double-click the Name value and type “Final Approval.” Click *Save*.

Part 5:

Now that our workflow looks correct, we need to go in and set Assignments for each Task so that the appropriate Users or Roles can actually complete the Task.

We’ll start with the Manager Review task. Click the node and, in the Properties tab, double-click the Assignments value. Click the drop-down to select Assignment Type and choose *Role Type*. From the Role Type drop-down, choose *Site*. Click the Role Name box and choose *Site Content Reviewer* from the options. Click *Save*.

Next, click the Final Review task. Double-click the Assignments value and click the drop-down. Choose *Role Type* and then *Site* from the Role Type drop-down options. Click the Role Name box and choose *Site Administrator* from the options. Click *Save*.

We don’t need to set an Assignment for the Update Content task node since we want the default Assignment, Asset Creator.

Part 6:

Next, we’ll set notifications for our tasks so that the appropriate people are notified when they have a task to complete.

We’ll start with the Manager Review. Click the Manager Review task node. Double-click the Notifications value in the Properties tab. Type "Manager Review Notification" for the Name of the notification.

Choose *Text* from the Template Language drop-down. Type "There is an item ready for Managerial Review" for the Template.

For Notification Type, choose *User Notification*. Click to open the Recipient Type drop-down and choose *Task Assignees*. This will send the notification to the Assignment we just set.

Click *Save*.

Part 7:

Next, we’ll set the notification for Final Review. Set the Notification for the Final Review Task

Click the Final Review task and double-click the Notifications value to edit it.

Type "Final Review Notification" for the Name. Choose *Text* from the Template Language drop-down and type "There is an item ready for final review" for the Template.

Choose *User Notification* for the Notification Type and open the Recipient Type drop-down. Choose *Task Assignees.*

Click *Save.*

Part 8:

And, finally, we’ll add a notification to the Update Content task.

Click the task and double-click the Notifications value to edit it. Type "Update Content Notification" for the Name.

Choose *Text* from the Template Language drop-down. Type "There is an item that needs updated" for the Template.

Under Notification Type, choose *User Notification*. For the Recipient Type drop-down, we’ll once again choose *Task Assignees.* Click *Save*.

Part 9:

At this point, our workflow is functional, but to make sure things are completed in a timely manner, we’ll add Timers to tasks. This will send out reminders if an Assignee has not completed a task after a certain deadline. We’ll use a 3-day timer for both Manager and Final Review.

Once again, click on the Manager Review task. This time, double-click the Timers value box in the Properties tab.

Type "Review Timer" for the Name. Type "3" for the duration and choose *Day* from the Scale drop-down menu.

Check the Blocking checkbox.

In the Type drop-down, choose *Notification*. Type "IMMEDIATE ACTION REQUIRED" for the Name.

Choose *Text* for the Template Language and, in the Template box, type "It has been 3 days since the item was submitted for review. Please review immediately."

Choose *User Notification* for the Notification Type.

Click the Recipient Type drop-down and choose *Role Type*. Choose *Site* from the Role Type and *Site Content Reviewer* from the Role Name options.

Click *Save*.

Part 10:

We’ll add another 3-day timer for Final Review.

Click on the Final Review task and double-click on the Timers value box.

Type "Review Timer" for the Name. Type "3" for the duration and choose Day from the Scale drop-down menu.

Click to check the Blocking checkbox.

For Type, select *Notification* from the drop-down. Type "IMMEDIATE ACTION REQUIRED" for the Name.

Choose *Text* for the Template Language drop-down and type "It has been 3 days since the item was submitted for Final Review. Please review immediately." as the Template.

For the Notification Type, choose *User Notification*

Click the Recipient Type drop-down and choose *Role Type*. Select *Site* from the Role Type options and then *Site Administrator* from the Role Name options.

Click *Save*.

That’s all we need to do, so now we can click *Publish*.

Part 11:

Now that our Workflow is live, we need to make sure it works. First, we’ll assign a User to the Review Roles. For simplicity, we’ll just assign these to our default Administrative User. If you have other Users in your instance, feel free to assign them the Roles and sign in as them later on to complete the Workflow. Keep in mind that your User will need a password, membership to the Marvin Robotics Site, and that you need to disable email verification for Users.

For now, we’ll open the *Global Menu* and go to Control Panel > Users > Users and Organizations.

Select your main Administrative User. [This might be your only User.]

In the Menu at the left, click *Membership*. As you can see, our User is already a member of the Marvin Robotics Site.

Go back to the Menu and choose *Roles*. Click *Select* beside Site Roles.

Click *Choose* beside Marvin Robotics and choose the *Site Content Reviewer*.

Click *Select* beside Site Roles again. And choose Marvin Robotics again. This time click *Choose* beside Site Administrator.

Click *Save* at the bottom of the page.

Part 12:

Next up, we’ll activate the Marketing Content Review Workflow.

Open the *Global Menu* and click View All on the Sites tab to see all Sites.

Click the *My Sites* tab and select the Marvin Robotics Site.

Open the *Site Menu*.

Go to Content & Data > Web Content. Click the *Add* button at the top right. Choose *Folder*. Type "Marketing" as the Name and click *Save*.

Click the *Options* icon, these three dots, beside the new folder and select *Edit*.

Go to the Structure Restrictions and Workflow section. You may need to expand this section by clicking this arrow at the right. Click *Default Workflow for This Folder (Marketing).* Choose *Marketing Content Review* from the drop-down menu and click *Save*.

Part 13:

Now, we’ll add a Web Content Article to the Marketing Folder.

Click the *Marketing* folder to enter it and then click the *Add* button to add content. Choose *Basic Web Content*.

Type "New Products January 2022" as the title of the article. For the content, type "Marvin Robotics is excited to announce the launch of three new Robotic Arms this January." Click *Submit for Publication* at the top right.

You should see that we have a blue *Pending* label underneath the title of the Web Content Article. And, if we look at the *Personal Menu* icon at the top right, we have a red notification bubble. So, we can see that our Workflow process has begun.

Part 14:

So now that our Workflow process has begun, we’ll go through the remaining steps.

Start by opening the *Personal Menu* and clicking on *Notifications*. You should see a list of all Notifications, including the one we just triggered. Since it is unread, it appears in bold.

Go ahead and click that top notification, which should read “There is an item ready for Managerial Review.”

At the top, you should see a section with the header *Assigned to*. Click the *Options* icon next to it and choose *Assign to Me*. Click *Done* in the pop-up.

You can scroll down to see a preview of the web content article if you want. For now, we’ll move ahead with the process.

Click the *Options* icon and select *Initial Approval*. Type "Looks good." in the Comment box and click *Done*.

You should now be on a page with a list of all workflow tasks assigned to you. Additionally, on the *Personal Menu* icon, we have a new Notification bubble.

Click the *Assigned to My Roles* tab next to Assigned to Me and click *New Products January 2022*. Click the *Options* icon next to *Assigned to* and choose *Assign to Me*. Click *Done* in the pop-up.

Click the *Options* icon again. This time, choose *Reject*. Type "Needs more detail." in the Comment box. Click *Done*.

Open the *Personal Menu* once again and click *Notifications*. You should now see the latest Notification is "There is an item that needs updated."

*(End of Video 1)*

# Exercise 2: Slides

Slide 29:

In this exercise, we’ll demonstrate how to Publish Content using Publications on the Marvin Robotics Platform.

Slide 30:

Our Objectives for this exercise are as follows. We will:

Enable Publications and Create a New Publication

Invite Users to a Publication

Schedule a Publication and View the Changes

Slide 31:

Our steps for this exercise are to:

Enable Publications and Create a New Publication

Add Pages in the New Publication

Add Fragments to the New Page

Add Two More Public Pages

Review and Publish Changes to the Publication

Create a New User and give them Access to the Marvin Robotic Site

And, assign the User Membership, a Role, and a Password

Slide 32:

We will also need to:

Create another New Publication

Invite the New User to the Publication

Sign In as the new User and Access the Publication

Make Changes to a Page

Compare the Publication and the Current Site

And, schedule the Publication for Release

Slide 33:

There is also a Bonus Exercise:

Create an additional publication. Make changes to the publication and to Production so that there are conflicts (for example, add duplicate folders or move a Web Content article). Resolve any conflicts that you are notified about when you attempt to publish the Publication.

We won’t go through this exercise, but you can complete it on your own after the video.

# Exercise 2: Content

Part 1:

To begin, we need to enable Publications on our platform.

As usual, Sign In as your platform Administrator. Open the *Global Menu* and go to Applications > Publications. Click *Publications* and click the *Enable Publications* toggle. Click *Save*.

To create a new Publication, Click the *Add* button at the top right. We’ll name this one "New Year Updates - 2022" and click *Create*.

You should now see the new Publication listed on the *Ongoing* tab. Additionally, you should see a bar at the top of your browser with a blue dot and the name of the active Publication. In this case, we have the blue dot next to *New Year Updates - 2022*.

Part 2:

Now we can begin making changes in our Publication. To start with, we’ll pages to one of our Sites.

Open the *Global Menu* and go to the Sites tab on the right. Click *View All.* in the pop-up, click the *My Sites* tab and choose the *Marvin Robotics* Site.

Open the *Site Menu* and go to Site Builder > Pages.

Click the *Add* button and select *Public Page*. Choose a *Blank* Content Page and type "Marvin Machines" as the Name.

Click *Add*.

Part 3:

We’ll go ahead and add a fragment to this page.

Open the *Fragments and Widgets* menu in the sidebar by clicking the plus icon.

Go to the Fragments tab and scroll down to Featured Content. Find the Features fragment and drag and drop it onto the page.

Then, click *Publish.*

Click *Marvin Machines* in the list of Public Pages to view. You can see we have our new page and the fragment we added.

Part 4:

Now we’ll go back by clicking the arrow beside *Marvin Machines* at the top, and we’ll add two additional Public Pages.

Click the *Add* button beside Public Pages. Choose *Add Page*.

Choose *Blank* from the list of templates and type "Revolutionary Robotics" as the Name. Click *Add* and then click *Publish* at the top. For now, we won’t worry about adding any Fragments or Widgets to the Page.

We’ll add one more page. Again, click the *Add* button beside Public Pages and choose *Add Page*.

Choose *Blank* and type "Contact Us" as the Name. Click *Add* and click *Publish*.

Part 5:

We’re now ready to review and publish the changes we made to the Publication.

Click the *New Year Updates - 2022* drop-down menu at the top of the page and click *Review Changes.* You can see a list of the changes we just made.

Click the *Marvin Machines* change to view in more detail. Everything looks good, so we can publish.

Click the *Publish* button at the top right next to Schedule. We’ll get a message here that says, "No unresolved conflicts, ready to publish." If there were any conflicts, we would see a notification for those instead, and we could back and resolve them.

But we have none now, so click *Publish*.

Open the *Personal Menu*. Click on *My Sites* and on the *My Sites* tab in the pop-up. Choose the *Marvin Robotics* Site. And we can see the new pages we added using the Publication.

Part 6:

Publications also allow us to invite Users to view, edit, and publish changes. So, for this part of the exercise, we’ll create a new User to manage a Publication.

Open the *Global Menu* and go to Control Panel > Users > Users and Organizations. And just to check, make sure the bar menu at the top says Production with a green dot.

Click the *Add* button to add a new User.

Our User is Douglas Babel. So, type "d.babel" as the Screen Name and "d.babel@marvinrobotics" as the Email Address.

Type "Douglas" for the First Name and "Babel" for the Last Name.

Click *Save*.

Part 7:

Next, we need to give Douglas Membership, a Role, and a Password.

Click *Memberships* in the menu on the left and click *Select* next to Sites. Choose *Marvin Robotics* and click *Save* at the bottom of the page.

Go to *Roles* in the menu on the left. Click *Select* next to Site Roles and choose *Site Administrator*. Click *Save*.

Click *Password* in the menu on the left. Type your *New Password* and then enter it again. Keep in mind, you’ll be prompted to change this password when we sign in as Douglas.

Click *Save*.

If this is the first new User you have created, be sure to disable email verification in the Control Panel under Instance Settings > User Authentication. Deselect the checkbox next to "Require strangers to verify their email address?" [Feel free to demonstrate these steps if you have not disabled email verification already.] You can find more detailed information on User creation in the Add Users and Manager Permissions module.

Part 8:

Now that we have a User, we can create the Design Updates Publication.

Open the *Production* bar menu at the top of the page. Choose *Create a New Publication* from the drop down. Type "Design Updates" for the Name and click *Create*.

Part 9:

We’ll now invite our new User, Douglas Babel, to the Publication.

Click the *Options* icon beside *Design Updates* and select *Invite Users.* Click the *Viewer* drop-down and select *Publisher*. This will allow the User to view, edit, and publish the Publication.

Type “Douglas” under *People* and select *Douglas Babel* from the drop-down. Click *Send* to invite Douglas to work on *Design Updates*. Click *OK* in the pop-up.

Part 10:

Now, we’ll sign in as Douglas Babel and work on the Publication.

Open the *Personal Menu* and click *Sign Out*.

Click *Sign In* and sign in as Douglas Babel using the email and password we just created. This will be [d.babel@marvinrobotics.com](mailto:d.babel@marvinrobotics.com) and “test.”

Click *I Agree* to the Terms of Use. Then, type a *New Password* and enter it again. Click *Save*.

Choose a *Password Reminder* and type an answer. Then click *Save*.

Part 11:

Now that we’re signed in as Douglas, we can start working on the *Design Updates* Publication. Open the *Personal Menu* and click *Notifications*. You should see that we have a notification from the Administrator inviting Douglas to work on Design Updates as a Publisher.

Check the bar at the top and make sure it reads *Design Updates*. If it says *Production*, click *Select a Publication* in the drop-down and choose *Design Updates*.

Open the *Personal Menu* and click on *My Sites*. Click the *My Sites* tab in the pop-up and choose *Marvin Robotics*.

Part 12:

Now we’ll make some changes to the Marvin Robotics Site as Douglas.

Open the *Site Menu*. Click the *Page Tree* icon and select *Marvin Machines* from the menu.

Click *Edit*, the pencil icon, at the top of the page. Open the *Browser* sidebar by clicking the arrow icon. You can see a list of the fragments on this page.

Click the plus icon to expand the topmost *Container* fragment.

Click the first *Container* fragment to select it and then click the Styles tab underneath the *Page Elements* section. You can also access this Style tab by simply clicking the Fragment you want to edit.

We want to add a background image to this fragment, so scroll down to the Background section and click the plus icon beside *Select Image* under Background Image. Click *Select File* and go to your unzipped exercise file folder. Select the "seasonalbanner.jpg" file and click *Open*. Then, click *Add*. You can see that image has appeared as the background of the top fragment.

Next, click *Publish* at the top right.

Part 13:

If we want to quickly compare the Design Updates publication with the current Site, we can use the bar at the top.

Open the drop-down bar menu at the top of the page and select *Work on Production.* This takes us back to the current state of our Site. As you can see, we no longer have that seasonal banner.

Open the drop-down bar menu again and select *Work on Design Updates.* Now, we’re back in our Publication, and we see that banner image.

Part 14:

We’re ready to schedule the Publication for Release.

Open the drop-down bar menu at the top of the page.

Select *Review Changes* to see all the changes we’ve made. Everything looks good.

Now, we’ll click *Schedule* at the top right. We’ll set it to today’s date and choose a publication time of 2 minutes from the current time. [Read aloud the date and time you set.]

Then, click *Schedule*.

We’ll navigate back to the *Marvin Machines* page of the Marvin Robotics Site. [Say aloud the steps you take to do this.]

We’ll wait a few minutes, and then we can see the changes once the scheduled time is reached.

*(End of Video 2)*