Improve Sites with Liferay DXP’s Modern Tools

Lecture Script

# Introduction

Slide 1:

(Read out Slide Numbers)

Hello, my name is [your name]. In this module, we’ll be learning how to Improve Sites with the Modern Tools found in Liferay DXP 7.4 *[seven dot four]*.

Slide 2:

Our Key Module Takeaways are:

Content Pages can combine fragments and widgets to create dynamic and engaging web pages.

Master Pages and Style Books provide ways to ensure consistent page experiences by defining common page elements or applying a set of visual rules.

Experiences and Responsive Layouts help create a unique, optimized User experience on a Site.

And, Integrating Digital Signature, Click to Chat, and Automatic Translation helps improve User support on Sites.

Slide 3:

Before we begin, make sure you have a Java JDK installed to run Liferay DXP. This can be done using the link on the screen which will direct you to download Java JDK 8. Note that using more recent versions of Java JDK may result in errors.

Be sure that you have unzipped the module exercise files in the appropriate folder structure for your OS. For Windows, we recommend the C:\Liferay path. For Unix systems, we recommend the [user-home]/liferay path.

Slide 4:

Our use case for this module is the Mondego Group, an international financial services organization. The Mondego Group wants to improve and streamline User experiences on several of its customer facing Sites. To do so Mondego needs to be able to quickly create pages using materials created by the development team and to apply consistent styling across multiple pages and Sites.

Slide 4:

Mondego also wants to improve Customer Service by adding the following:

Unique User Experiences for different customers and user groups;

A click to chat feature to allow Users to chat directly with a Customer Service representative;

A secure way for Users to sign and submit documents;

And, Automatic Translation for web content.

Slide 6:

Mondego’s Key Performance Indicators are as follows:

Decrease the amount of time spent styling pages and Sites.

Increase User engagement by creating Experiences and improving Site navigation and mobile compatibility.

Improve response time to User questions by integrating Click to Chat functionality.

Reduce time spent translating web content by enabling automatic translation.

*(End of Video 1)*

# Using Content Pages and Fragments

Slide 7:

In this section, we’ll discuss how to use Content Pages and Fragments to create dynamic and engaging content.

Slide 8:

If you’ve followed along with the “Build New Sites with Liferay DXP” module, you may recall that Content Pages are the default page type in Liferay DXP. Widget Pages, a separate page type built solely using widgets, are still available in DXP 7.4 and may be selected for pages with specific purposes, such as a Widget Page created using the Blog template.

Since Content Pages are the default page type, most of the pages on Mondego Sites will be Content Pages. Content Pages still allow the Web Team to add necessary widgets, but they are easier to edit and design.

The Editing UI for Content Pages contains drag-and-drop elements in the Fragments and Widgets tabs which are used to quickly build out pages. Content Pages are designed to be used with minimal configuration and have two main editing modes: Page Design and Content Editing.

Slide 9:

The default editing mode for Content Pages is Page Design. Page Design gives Users the option to edit and change the page layout, add or revise content, and add Fragments and Widgets. Page Design contains the following action elements in the sidebar: Fragments and Widgets, Browser, Page Design Options, and Comments.

The Fragments and Widgets section opens a menu with two tabs containing all available Fragments and Widgets. The Browser section provides options related to page elements and page content as well as general and style features for elements. The Page Design Options section includes options for managing the Master Page and Style Book associated with the Content Page. The Comments section allows permitted Users to add or reply to comments on specific fragments.

Slide 10:

The second editing mode is Content Editing. Content Editing is a slightly more restricted editing mode, containing only two of the action elements seen in Page Design: Browser and Comments. Content Editing allows Users to edit the content on a Page without impacting the layout. In this mode, the layout is fixed, and no new Fragments and Widgets can be added.

As discussed in the module, “Add Users and Manage Permissions,” Liferay DXP recommends the principle of least permissions when granting Users access to the platform. By granting a User the Update Page Content permission, an editor can revise and update the text on a page without modifying the layout established by the page designer. If the editor has recommendations for the layout, they can access the Comments section in the sidebar and leave a comment.

The Mondego Web Team has designers that manage the design and layout of Pages to ensure quality and uniformity. However, the content creators need to add content to the various pages on the Site. By granting the Content Creator site role permission to “Update Page Content,” users with that role can add relevant content to the Pages without worrying about the design.

Slide 11:

Now that we’ve discussed our two editing modes, let’s take a closer look at the specific action elements available with Content Pages. The Fragments and Widgets section, which is accessed using the plus icon at the top of our sidebar, contains drag-and-drop elements used to build content on a page.

Fragments are predefined segments that contain editable elements including text, images, or links. These are the primary building blocks of Content Pages. The editable elements in Fragments can be replaced with custom content directly on the page or mapped to existing Site content using the Browser sidebar.

Widgets are applications that can be added to a page. Widgets are added to Content Pages much in the same way that they are added to Widget Pages, though configuration options differ between the two Page Types.

A large variety of both fragments and widgets are available out-of-the-box in Liferay DXP. If needed, custom fragments and widgets can be created to further adapt the platform to the desired look and feel for your business.

The flexibility of Content Pages allows the Mondego Web Team to create well-designed pages with a variety of content. The team can quickly drag and drop elements to design a page and get a sense of the appearance and layout before populating it with content. Fragments also allow the team to directly add and edit page elements with or without mapping it to existing content.

Slide 12:

Out-of-the-box, Liferay DXP contains the following Fragment types:

Layout Elements, which define drop zones and provide organizational structure. These include the Grid and Container fragments.

Basic Components are simple elements that add basic functionality, such as Button, Card, Image, Paragraph, and more.

Content Display fragments display Site content individually or as a collection. These are similar but not identical to Content Management Widgets. Content Display fragments can feature a single content item or a collection.

Cookie Banner fragments display a banner for cookie acceptance. The banner adds a notification which informs users that the Site uses cookies and prompts them to Accept. Cookies are enabled and managed in the Control Panel.

Featured Content includes multi-part fragments that display prominent content, such as Banners, Features, and Highlights.

Footers are fragments that serve as page *footers* and navigation bars while Navigation Bars are fragments that serve as *headers* and navigation bars. These fragment types allow additional or alternate navigation to be added.

And, finally, Menu Display is a fragment used to add a menu bar anywhere on a page. These additional menu bars can be based on the Site’s Public or Private Page hierarchy.

The Mondego Web Team can easily create a dynamic landing page for the main Site using the out-of-the-box Fragments. For instance, a Banner fragment welcomes guests and prompts them to sign in or create an account. Using the Grid component, they can set a row of Cards with information about specific account types. They can add a unique Footer with a distinct menu for contact information, FAQs, Career options, and more.

Slide 13:

Many fragment elements can be edited and configured directly from the UI, including Styles, Text, Hyperlinks, Images, and Layout. Layout, Text, and Images can be managed directly on the page. Layout is changed by simply dragging elements around the page. Text and Images are changed by double clicking the element to edit text or set an image. You can also manage these elements in the Browser, which is also where we set Styles and Hyperlinks.

So, if you wanted to change the banner image pictured here, you would simply double click on the image and select a new one. Similarly, double clicking the heading element would let you change the text. These changes can also be done from the Browser. When the Browser is open and an element selected, several tabs may appear in the lower half of the sidebar, including General, Styles, Links, and Mapping, which are used to configure things like content or image source, overall style, and links. We’ll discuss the Browser in more detail on the next slide.

Fragments can also easily be duplicated or saved so that the same content or configuration can be reused in the future on other pages.

One new configuration setting in Liferay DXP 7.4 is the ability to “Hide” or “Show” Fragments for different devices. The four screen icons at the top of the page represent Desktop, Tablet, Landscape Phone, and Phone. Selecting a different screen and navigating to the Styles tab gives you the option to set whether a fragment is visible on that device or not.

For example, the Mondego Banking Site has a fragment containing a link to download the Mobile Banking App. Since this Fragment is not needed for Desktop users, they can choose to hide the Fragment if the device is not a Phone or Tablet.

Slide 14:

Now let’s look at our Browser. The Browser sidebar, added in Liferay DXP 7.4, is used to manage the content on a Page. It contains two primary tabs at the top, Page Elements and Page Content.

The first tab, Page Elements, hierarchically displays all elements on a page. Fragments with multiple elements can be expanded to view all of their components, including text, images, and links.

Selecting elements in the Browser also opens additional tabs below the Page Elements section. These tabs include General, Styles, Mapping, Image Source, and Link. General includes basic configuration settings specific to the selected element. Styles provides styling options, including margins, padding, font size and color, background, and more. Additionally, under Styles, you can manage an element’s size or visibility on different devices. The Mapping tab appears for elements that can have content from elsewhere on the platform mapped to them. And, the Link tab displays when you have a link element.

The second tab, Page Content, lists all content on the page and allows actions, such as editing and managing permissions, to be performed. On the Page Content tab, content is divided into categories, including Inline Text, Collections, Documents, and Web Content Articles. Selecting the pencil icon next to an inline text item, for example, places your cursor in the chosen text box. The options menu next to other content items shows you available options for that item, which may include permissions, editing, or viewing.

If a Mondego Page Creator needs to quickly see the specific elements and content on a Page and apply styles, they can use the Browser to quickly navigate to the appropriate element. They can quickly reorder fragments in the Page Elements tab and adjust the appearance of Fragments under Styles. To quickly view or edit all of the content pieces, they can switch to the Page Content tab.

Slide 15:

The Page Design Options section includes two tabs, Master and Style Book, with options that can be applied to a Page to define overall style and layout. Master lists all available Master Pages. Style Books lists all available Style Books. Additional Page Design settings, including Look and Feel and Advanced settings, can be accessed by clicking the More link at the top.

Content Pages will automatically use the default Master Page, usually Blank, and Style Book. Once a new Master Page Template or Style Book has been created, they can be set as the default and will automatically apply to any new Content Pages. We’ll discuss these in a later video.

If the Mondego Web Team comes up with a new Master Page Template, they can apply it to a Content Page under the Page Design Options tab. Likewise, they can update a page’s appearance by choosing a new Style Book.

Slide 16:

Our last section in the sidebar is the Comment section.Comments are annotations that can be added to Fragments without altering any of their contained content. Comments can be used to:

Facilitate team member collaboration while creating Content Pages

And, notify specific individuals of suggested page updates using the Mentioning Users feature.

Mentions must be enabled in order to tag Users in the comment. This is managed in the Control Panel under Instance Settings > Community Tools or at the Site scope under Configuration > Site Settings > Community Tools. Users are then mentioned by using the @ symbol and the User’s username. Keep in mind, the mentioned User must have the proper permissions to view the comment.

Comments are especially useful for the Mondego Web Team, since they can allow other approved Users to review a Page and leave input without them changing the layout or Fragments on the page.

Slide 17:

Let’s review how the Mondego Group can use Content Pages. To create dynamic, engaging pages for the Mondego Site, the web team uses Content Pages, which give them flexibility and speed in page creation, especially when they need to work collaboratively.

The Mondego Web Team includes Users with different roles and task assignments, such as page designers and content creators. The page designers use Fragments in Page Design mode to quickly build the envisioned page. Content creators are granted the Update Page Content permission and use Content Editing mode to directly add content to the page and can leave comments on Fragments for the page designers to review.

Slide 18:

We’ve reached our Knowledge Check.

The Mondego Web Team creates Content Pages by dragging and dropping *Blank* and *Blank* onto the page.

Mondego Content creators can edit content *Blank* using *Blank* mode, while the Page creators can manage the design and layout in *Blank* mode.

The Mondego web team can use the *Blank* sidebar to easily navigate the hierarchical arrangement of elements, fragments, and content and to manage styles, permissions, and other settings.

Mondego’s Content Creators can leave *Blank* on specific elements on a page to give Page Designers feedback on the layout.

*(End of Video 2)*

# Using Master Page Templates and Style Books

Slide 24:

In this section, we’ll cover how to use Master Page Templates and Style Books to create a consistent Site and Page experience by defining common page elements and applying a unique Site theme.

Slide 25:

Master Page Templates are a way to define common Page elements with Fragments. Master Pages remove the need to deploy plugins to maintain and manage elements like Headers and Footers. Every Page and Page Template on a Site must be associated with a Master Page Template, even if that Master Page is the default, Blank. Individual Pages and Page Templates on the same Site can be associated with different Master Page Templates as needed to provide the optimal User experience.

Slide 26:

Custom Master Page Templates are created from the Design section of the Site Menu. Page Fragments designated as common elements can be dragged and dropped onto the page. The Drop Zone defines where elements will be added when Content Pages use the Master.

Typically, Master Page Templates are used to define a Header and a Footer for Pages. For instance, adding a distinct Mondego Header and Footer Master means that pages built from that Master will automatically use the established header and footer.

The Configure Allowed Fragments button is used to specify which types of Fragments can be added. For instance, if you create a Master used for certain types of written articles, you could select Basic Components as your only allowed Fragments.

Slide 27:

Style Books provide a way to alter general aspects of a Site’s look-and-feel without implementing a new Theme, such as the Color Scheme, Spacing, Layout, and Fonts.

Style Books should not be viewed as a replacement for a Theme but rather as a tool to quickly alter a Site’s general appearance within the UI without drastically changing the way it is presented. Style Books can also be created by developers and associated with Themes.

The Sections you can manage when you create a new Style Book include:

Color System, or the color theme used for fonts and visual elements.

Spacing, the spacing between elements.

General, which are options to modify color and spacing elements that appear on every page, such as the background color of all pages.

Layout, which establishes the width of containers on pages.

Typography, the options for fonts, including font family and size.

And, lastly, Buttons, where you can modify the style, color, and border of default types of buttons.

Once created, Style Books can be selected and applied to any Page when editing or applied to the entire Site by setting the Style Book as the default.

Mondego’s design team has come up with a color scheme for all Mondego Sites. To implement this, they create a Style Book using the selected colors, fonts, and features. This Style Book is then set as the default and applied to all pages on the Site.

Slide 28:

To create a unique Mondego style and apply it across all pages on the Site, the Mondego web and design teams:

Design a set of Master Page Templates to standardize the appearance of different kinds of pages across the Site

Design a Mondego Color Scheme and Style and create a Style Book to implement the Style across all Pages on the Site

With Master Page Templates and Style Books, the team can complete these design tasks without leaving the Liferay DXP UI.

Slide 29:

Let’s review with our Knowledge Check for this section.

Mondego’s web team can create *Blank*, which define common groups of *Blank* for all Site pages.

All Mondego *Blank* and *Blank* on a Site must be associated with a Master Page Template, even if that template is the default, *Blank*.

*Blank* provide a way to alter Mondego’s Site aesthetics from within Liferay DXP’s UI without needing to deploy a *Blank*, allowing the web team to manage color, fonts, and other design elements.

*(End of Video 3)*

# Creating Unique Digital Experiences

Slide 7:

In this section, we’ll take a look at some of the new features in Liferay DXP 7.4 that allow you to create Unique Digital Experiences.

Slide 36:

Liferay DXP includes several features and tools that can be used to improve your Users' experiences including:

Personalized Experiences and User Segments

Customizable Navigation Bars

Responsive Layouts

And several newly Integrated Tools unique to 7.4: Click to Chat, DocuSign, and Automatic Translation

Slide 37:

Experiences are a way to tailor page content to specific user groups in Liferay DXP. Experiences are unique to Content Pages and are created and applied to a selected User Segment.

Segments are groups of Users, not to be confused with User Groups. Segments are created in Liferay DXP by defining a set of conditions and properties a User must meet to fit in the Segment. For example, a Segment could contain only Users with a certain birth year from a specific region. Note, that User Groups can be one of the conditions used to define a Segment.

Experiences are also useful for completing A/B Testing, which requires an instance of Liferay Analytics Cloud to collect data. Though Experiences and Segments are available with only Liferay DXP, some features are only available when used in conjunction with Analytics Cloud

Mondego can utilize Experiences to create Pages tailored to specific User Segments. For example, the main Home Page features a special offer only available to customers in North America. In order to ensure that only eligible customers access the offer, the team creates an Experience assigned only to the User Segment of North American customers.

Slide 38:

Content Pages in Liferay DXP 7.4 have new Fragments, Dropdown and Menu Display, that allow Site navigation tools to be added anywhere on the page.

The Dropdown fragment provides a collapsible drop zone for any fragment or widget. It can be especially useful when creating Mega Menus as it does not require the development of a custom theme.

The Menu Display fragment provides new options for displaying navigation menus. The menu is based on the Site’s page hierarchy and can be defined to include only the desired levels. There are two methods for building a hierarchy in the Menu Display Fragment: Site Menus and Contextual Menus.

Site Menus use menus defined in the Navigation Menu for Site navigation, by default the Public Pages or Private Pages hierarchies.

Contextual Menus show a menu based on Page context and allow for more advanced navigation by combining Menu Display Fragments. With Contextual Menus, you can select an option as it relates to the current page: Children, Self and Siblings, or Parent and its Siblings

Mondego can utilize Customizable Navigation Bars to improve navigation around the Site. For instance, a Page on general investment tips might include a Contextual Menu linking to Pages with similar content, for instance a series of Sibling pages also about Investment and Saving tips and tricks.

Slide 39:

By default, Liferay DXP uses responsive design. This means that you do not need to create a set of rules to ensure that a web page works on both desktop and mobile. Note that this is not the case for earlier versions of Liferay DXP. 7.2 and earlier use Mobile Rules.

Out of the box, widgets automatically scale to fit screen size. The Device Display at the top of the page editor simulates screen size so layout can be checked before publishing.

Grid and Container Fragments on Content Pages add additional control and customization to the content layout. With these fragments, specific layout styles can be defined for different screen sizes.

For example, many Mondego Users access the Site on mobile devices. By placing Fragments in Grid or Container Fragments, the web team can design Pages that are visibly appealing and functional with different screen sizes. Instead of three cards displayed horizontally, which would be difficult to read on mobile devices, the web team arranges these cards vertically for phones and tablets.

Slide 40:

Beginning in Liferay DXP 7.4, it is possible to integrate with live support chat platforms. Enabling Click to Chat adds a chat window to Sites on your Liferay instance to improve support and Site experience for Users. To fully enable Click to Chat, a Site Settings Strategy and Chat Provider and Account ID must be established. You can also determine whether guest users can use click to chat or not.

The Mondego Group adds Click to Chat on its Banking and Investment Sites, allowing the Customer Support Team to quickly answer Users’ questions through chat.

Slide 41:

Also new in DXP 7.4, DocuSign digital signatures can be integrated into documents. Signatures are collected on a Document by selecting Collect Digital Signature, Filling out the Envelope information, and sending it.

Collect Digital Signatures can be applied to a single document or to a collection of documents. Once you select the documents or documents, you need to fill out an Envelope, which is the document or collection to be signed, with information including the recipient’s name and email and any accompanying message.

Signed documents are stored in DocuSign, not Liferay, so downloaded documents must be fetched from DocuSign. You can track the Envelope status by going to Site Menu > Content & Data > Digital Signature. There, you can Filter and Order or use the Search Bar to locate specific Envelopes.

Like Click to Chat, you will need to establish a Site Settings Strategy and provide credentials for DocuSign, including your API User ID, API Account ID, Account’s Base URI, Integration Key, and RSA Private Key

Mondego has a variety of documents it needs to safely collect digital signatures on, including employee paperwork and new customer applications. By enabling DocuSign, it is possible to securely send and receive necessary signatures.

Slide 42:

Liferay DXP 7.4 also introduces Automatic Translation for web content. By integrating with Google Cloud Translation API, automatic translations are generated for Web Content. Once Automatic Translation enabled, Auto Translate buttons are added to the translation interface for Web Content.

To enable Auto Translate, you will need to provide a valid Google Cloud service account key.

Automatic translation is only available for Web Content.

When you open the Translate option for a piece of Web Content, you have two options for Auto Translate: Auto Translate every Web Content field or Auto Translate specific Web Content fields.

Mondego can enable Automatic Translation to easily generate Spanish, French, and other versions of Web Content articles. Rather than manually uploading translations for a series of Web Content articles that provide information on different accounts available at Mondego Banks, Auto Translate automatically generates translations.

Slide 43:

Let’s review how the Mondego Group will use Liferay DXP’s tools to create unique experiences.

To improve User Experience on Mondego Sites, the web team implements a plan to improve personalization. Several Content Pages are updated to include multiple Experiences which are assigned to newly created User Segments, including the Mondego North America User Segment.

To improve customer service and support, Mondego also:

Integrates with DocuSign to securely collect digital signatures.

Enables Click to Chat, allowing customers to directly chat with a representative.

And adds Automatic Translation which allows a broader audience to access and engage with web content and information on the Site.

Slide 44:

Now, we’ve reached our Knowledge Check for this section.

The Mondego Group can use *Blank* to create versions of Content Pages customized to specific *Blank*.

Mondego has a larger number of Users that visit the Site from mobile devices. To make sure that pages work for mobile Users, the web team uses the *Blank* and *Blank* Fragments and defines their layouts for different screen sizes.

To securely collect signatures from Mondego employees and from customers, *Blank* is enabled.

Mondego also improves customer support and Site accessibility by integrating with *Blank* and enabling *Blank* of Web Content.

*(End of Video 4)*

# Summary

Slide 51:

We’ve now reached the Summary of our module.

Fragments and widgets can be used to create Content Pages, which make building engaging web pages both quick and easy with a drag-and-drop creation process.

Master Pages provide a template for headers and footers that can be used on multiple pages on a Site for consistent style and design.

Style Books enable one to make stylistic guidelines for a Site within the confines of the Liferay DXP UI, including managing color scheme, font, and layout.

Slide 52:

Experiences are unique versions of a single Content Page that can be targeted at a specific User Segment for a more personalized Site experience.

Adding Custom Navigation Bars improves Site navigation and allows a User to easily navigate to related content.

The Grid and Container Fragments can be customized to display differently depending on the screen size, improving User experience on any device.

Slide 53:

By enabling Click to Chat and integrating with one of the supported Chat Providers, a chat window can be added to a Site for added User Support.

Integrating with DocuSign digital signatures allows User signatures to be collected and managed on documents on documents.

Enabling Automatic Translation allows Web Content to be quickly translated using Google Cloud Translation rather than relying on manually added translations.

Slide 54:

For more information regarding Content Pages and Fragments, consult the documentation on Content Pages at learn dot Liferay dot com.

For more information on Master Page Templates and Style Books, consult the documentation on Site Appearance learn dot Liferay dot com.

To learn more about Creating Unique Digital Experiences with Responsive Layouts, Experiences, and Custom Navigation Menus, visit the Site Building section of the Liferay DXP documentation on learn dot Liferay dot com.

Slide 55:

You can also use the links on screen to find information about the specific new features of Liferay DXP 7.4 covered in this course: DocuSign Digital Signatures, Click to Chat, and Automatic Translation.

*(End of Video 5)*