



Create Web Experiences Using  
Adobe Experience Manager v6.x

student workbook



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## Create Web Experiences Using Adobe Experience Manager v6.x

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# Adobe Experience Manager Touch UI



## Overview

This module introduces the Touch User Interface (UI) of Adobe Experience Manager, different consoles, and key interface elements of a page.

## Objectives

By the end of this chapter, you will:

- List the key elements of Touch UI
- Explain various Touch UI consoles
- List the key interface elements of a page

# Introduction to Touch UI

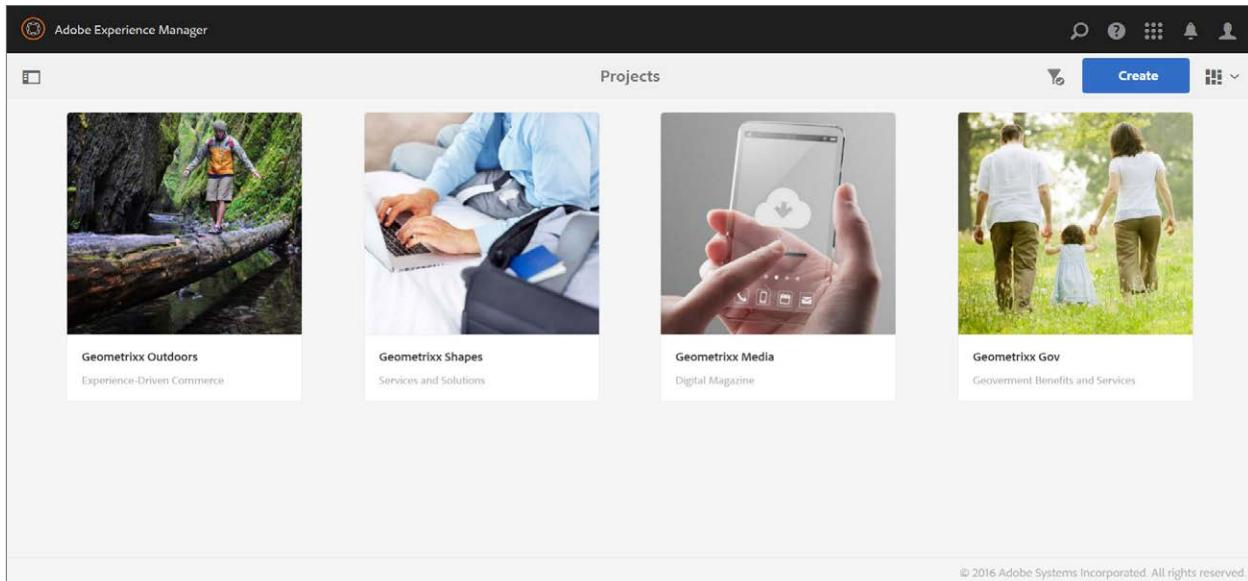
Adobe Experience Manager touch-optimized User Interface (UI) combines the advantages of web interface with the fluidity and responsiveness that is usually associated with desktop applications.

The interface allows you to use the following touch and mouse actions to perform various operations:

Touch UI Actions	Desktop UI Actions
Tap	Click
Touch-and-hold	Double-click
Swipe	Hover

## Elements of Touch UI

Let's familiarize ourselves with the key areas of Touch UI. When you load the application, the **Projects** console displays first.



*Welcome Screen*

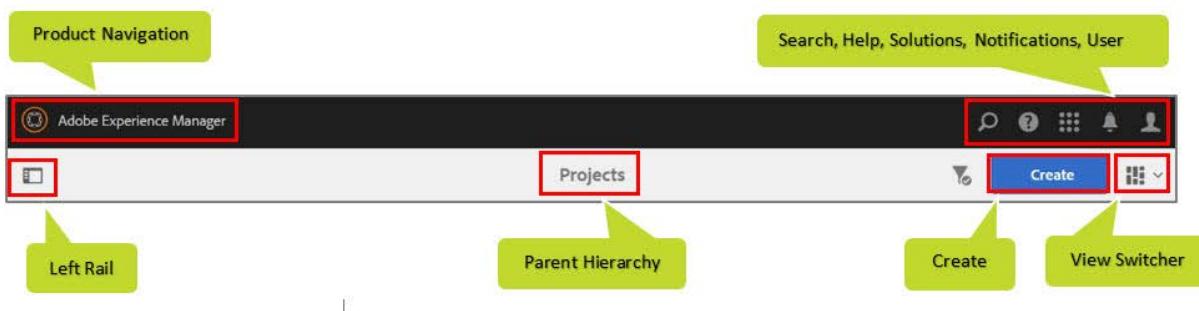
The key elements of Touch UI can be categorized into:

- Header bar
- Actions bar
- Left Rail

## Header Bar

The header bar is at the top of the screen and contains the following, which are available globally:

- **Product Navigation** panel—to access other consoles
- **Search**—to look for and filter the content and tools
- **Help**—to access help resources
- **Solutions**—to integrate Adobe Experience Manager with other Adobe Marketing solutions
- **Notifications**—to indicate the alerts
- **User**—to set and manage preferences
- **Left Rail (Hamburger)**—to access additional capabilities related to content in the side panel
- **Parent Hierarchy**—to navigate towards the top of the hierarchy within a specific console
- **Create**—to create resources appropriate to the console
- **View Switcher**—to switch through different types of views



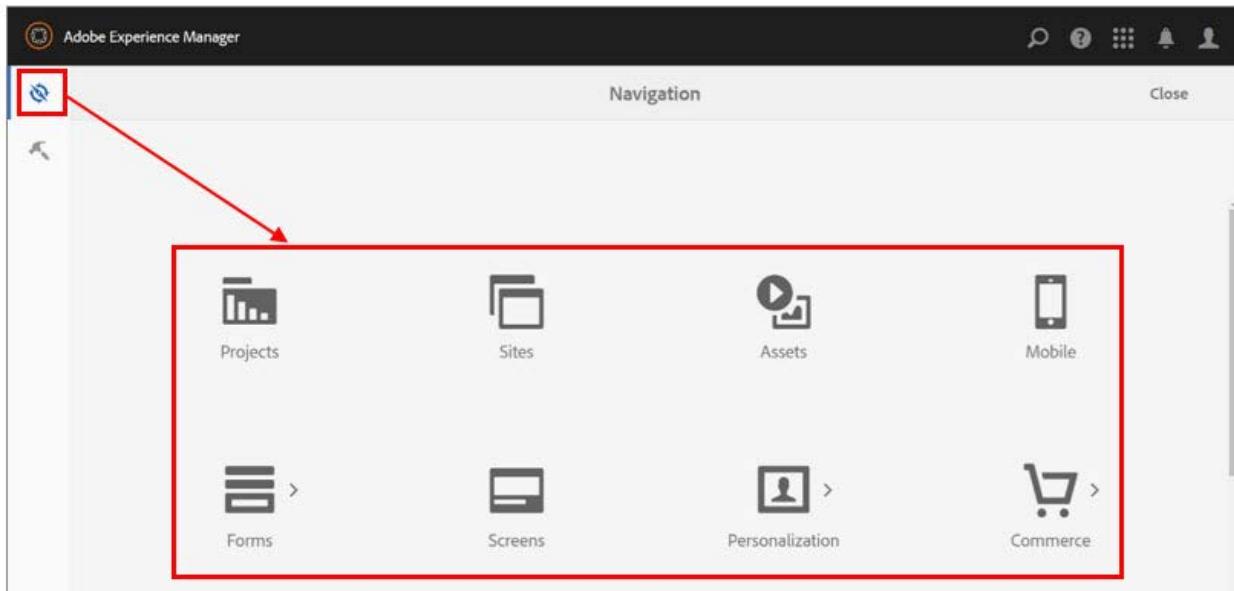
### Components of the Header Bar

Let's look into key components of the Header bar in detail.

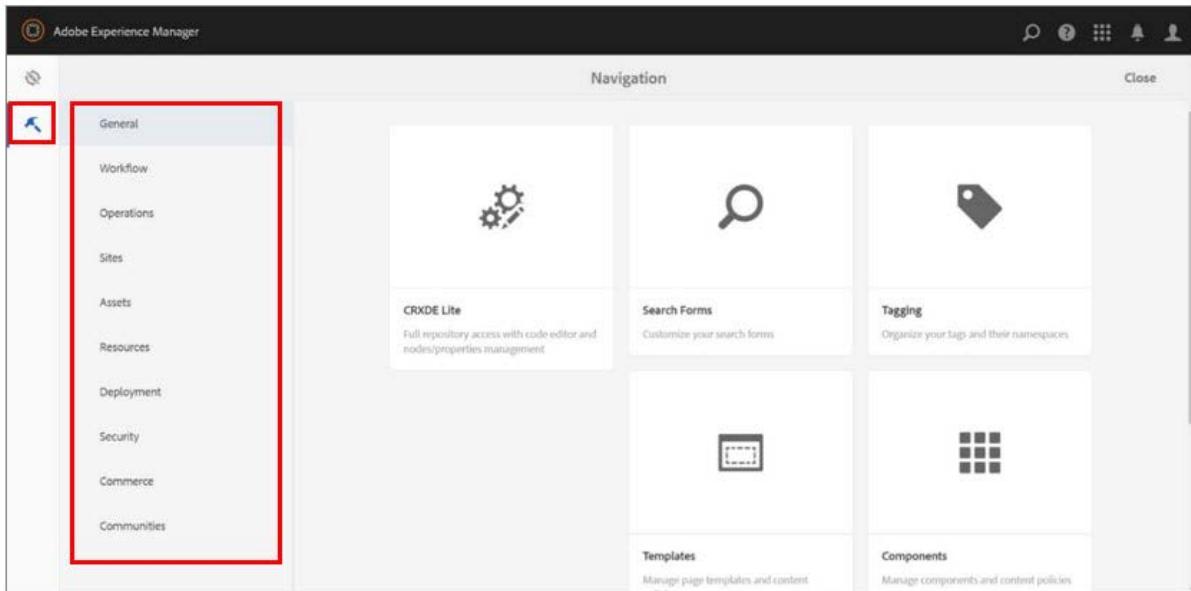
- **Product Navigation**—allows you to navigate between the consoles. To view all the consoles click the **Adobe Experience Manager** link.



- › Product Navigation contains two panels, one for **Navigation** to other consoles and the other is the **Tools** console.
- » **Navigation**—provides access to different consoles such as Projects, Sites, Assets, Mobile, and so on. If you want to return to the previous location click the Close button in the top right.



- » **Tools** console—helps you to administer websites, digital assets, and content repository.



- **Search**—provides a new unified search experience. It allows you to search across different modules (for example, Assets, Sites, and so forth) without switching between different consoles.
  - › By default, the search results are limited to your current location (for example, console and related resource type). The **Search** icon is available in the top-left of the Header bar.



**TIP:** You can also search for content in Adobe Experience Manager using the "/" key.

- **Search:**
  - › Improves the search experience by providing suggestions. For example, if you type **Tri** (without pressing the Enter key), you will get a list matching the letters or words you key in.

A screenshot of a search interface. At the top is a search bar with the placeholder 'Type to search ...'. Below the search bar is a list of suggestions starting with 'Tri'. The first suggestion, 'Go to Tools > Deployment > Distribution', is highlighted with a blue background. Other suggestions include 'Trina', 'Triangle', 'Triangle series', 'Triangle packshot', 'Triangle - scalene', 'Triangle - isoceles', and 'Triangle - equilateral'. At the bottom of the list is an email address: 'Trina.dombrowski@geometrixx-media.com'.

If required, you can remove the location filter (select X on the filter you want removed) to search across all consoles/resource types.

- Provides a powerful search experience by providing hints about filter options (for example, Predicate suggestions). For example, if you type **Imag**, Adobe Experience Manager suggests that there is a File Type filter with value **Images** that can be used to narrow down the search result.



- Allows you to look:
  - for a specific keyword, path or tag.
  - filter according to resource specific criteria, such as modified dates, page status, file size, and so on.

The screenshot shows a search results page titled "Activity". A red box highlights the "Location: Sites" button. A green callout bubble points to the "Rail icon" (represented by a square icon with a grid) and says "Click Rail icon to view Filter & Options". The search results table has three columns, each showing a thumbnail, the title, and details like "LIVE COPY" and "2 years ago".

Thumbnail	Title	Details
	LIVE COPY Cuzco	2 years ago Not published
	LIVE COPY Halifax Winter	9 months ago Not published
	LIVE COPY Baffin Snow	9 months ago Not published

» define and use a saved search for future.

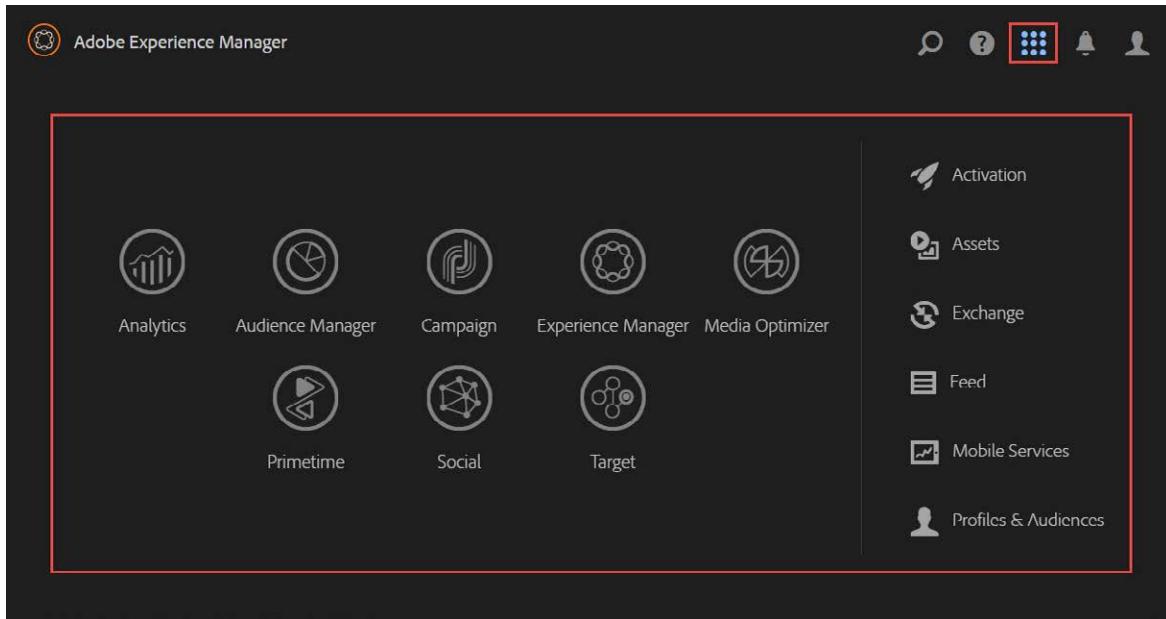
The screenshot shows the 'Activity' search interface in Adobe Experience Manager. On the left, a sidebar titled 'Filters & Options' has a red border around its top section. It includes dropdowns for 'Saved Searches', 'Select Search Directory', and 'Select Tag(s)', and three expandable sections: 'Modified Date', 'Publish Status', and 'LiveCopy Status'. At the bottom of the sidebar are 'Cancel' and 'Save' buttons. The main area is titled 'Search Results' and displays two 'LIVE COPY' items: 'Cuzco' (modified 2 years ago, not published) and 'Halifax Winter' (modified 9 months ago, not published). Below the results is a preview of the 'Halifax Winter' page, which is a community landing page for Geometrixx.

 NOTE: When you are in Product Navigation, the **Search** icon is visible but you cannot search for content or resources.

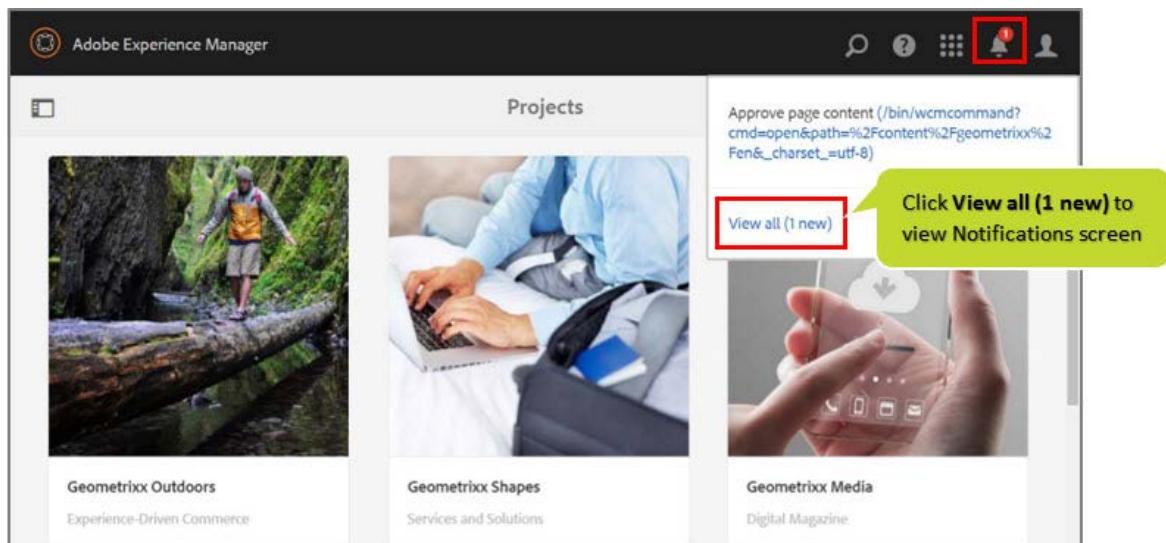
- **Help**—provides resources such as documentation, community, and forums.

The screenshot shows the Product Navigation interface in Adobe Experience Manager. The main area displays three project cards: 'Geometrixx Outdoors' (Experience-Driven Commerce), 'Geometrixx Shapes' (Services and Solutions), and 'Geometrixx Media' (Digital Magazine). To the right is a sidebar with a 'Search' input field and a list of links: 'What's New', 'Documentation', 'Help Home', 'Community', and 'Customer Care'. The 'Search' field and the entire sidebar list are highlighted with a red border.

- **Solutions**—provides the link to seamlessly integrate different Adobe Marketing Cloud solutions.
  - › The Cloud consists of integrated applications to collect and unleash the power of customer insight to optimize customer acquisition, conversion, and retention efforts as well as the creation and distribution of content.



- **Notifications**—You can view and process notifications from different areas of Adobe Experience Manager. For example, notification about work items or tasks that represent actions that you need to take on page content.



Notifications

**Close**

✓ Complete ↺ Step Back ⚙ Delegate ⓘ Details 1 selected

REQUEST FOR ACTIVATION ADMINISTRATORS Approve content /CONTENT/GEOMETRIXX/EN 1 minute ago

- **User**—gives you access to the following functionalities:
  - › Sign Out: To log off from the current session
  - › Impersonate as: To work on behalf of another user
  - › User Preferences (cogwheel icon): To configure user preferences for the instance

Adobe Experience Manager

Projects

Geometrixx Outdoors Experience-Driven Commerce

Geometrixx Shapes Services and Solutions

Geometrixx Media Digital Magazine

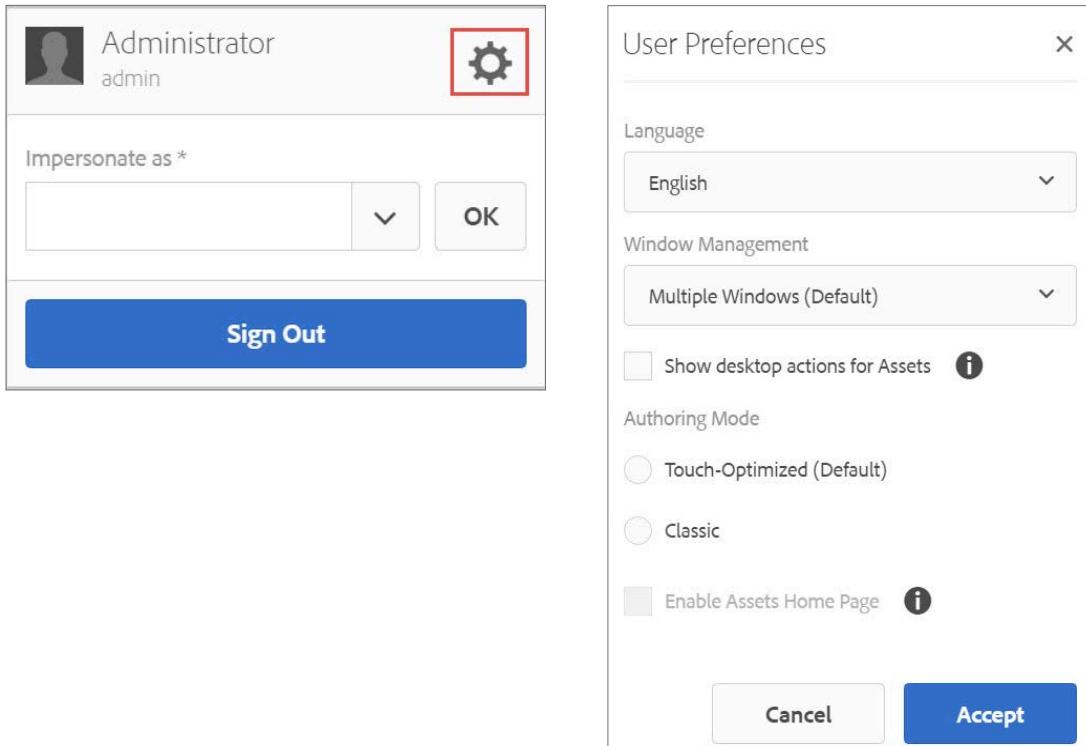
Administrator admin

Impersonate as \*

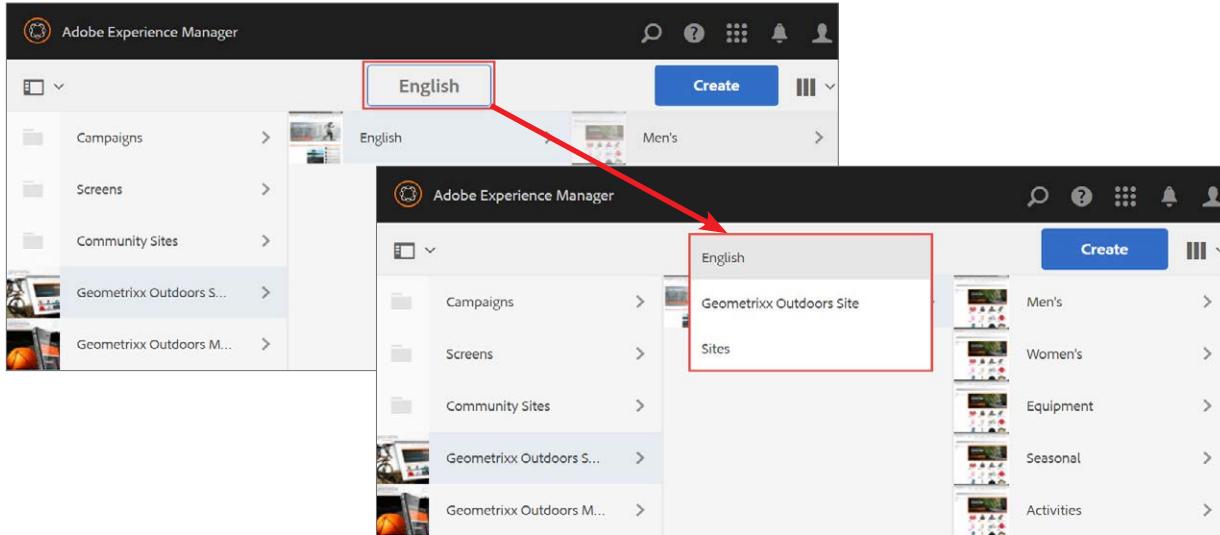
OK

Sign Out

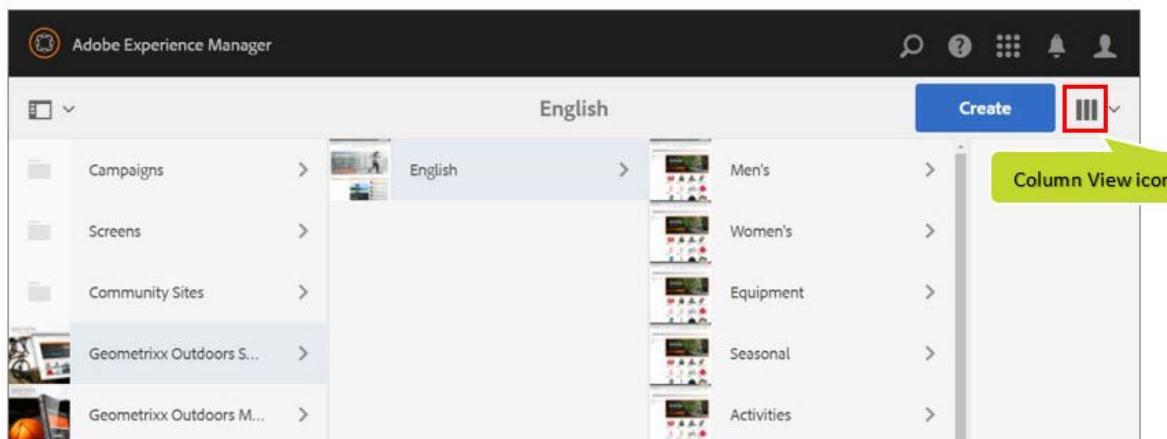
- User Preferences allows you to set :
  - › **Language:**
    - » The language to use for the UI of the authoring environment. Select the required language from the available list, it will be used for the UI.
  - › **Window Management:**
    - » You can select either, Multiple Windows (Default) the pages will be opened in a new window. In Single Window, the pages will open in the current window.
  - › **Show desktop actions for Assets:** Requires the Assets companion app or Create Cloud desktop app.
  - › **Authoring Mode:** Allows you to set the default UI mode to be used when authoring a page.
  - › **Enable Assets Home Page:** Available only if your system administrator has enabled Assets Home Page experience for the entire organization.



- **Parent Hierarchy**—allows you to navigate within a specific console. For example, click the breadcrumbs to navigate through various levels of your website.



- **View Switcher**—You can view, navigate through, and select resources with any of the available views. You can select each of these views from the dropdown available at the top right.
  - › Touch UI has the following three views:
    - » **Column View**—lists information for the selected resource at the current level, including sibling and child resources. Depending on past navigation, it also lists parent resources. You can navigate up and down the tree by tapping/clicking on a resource name.



- » **Card View**—shows information cards for each item at the current level. You can navigate down the tree by tapping/clicking on cards or up again by using the breadcrumbs in the header.

Adobe Experience Manager

Sites

Create

Card View icon

Campaigns	Screens	Community Sites
Geometrixx Outdoors Site 1 year ago Not published	LIVE COPY Geometrixx Outdoors Mobile Site 1 year ago Not published	Geometrixx Demo Site 1 year ago Not published

- » **List View**—lists information for each resource at the current level in the form of a tree. You can navigate through the tree by tapping/clicking on the resource name, up with the breadcrumbs.

Adobe Experience Manager

Sites

Last 30 Days Data

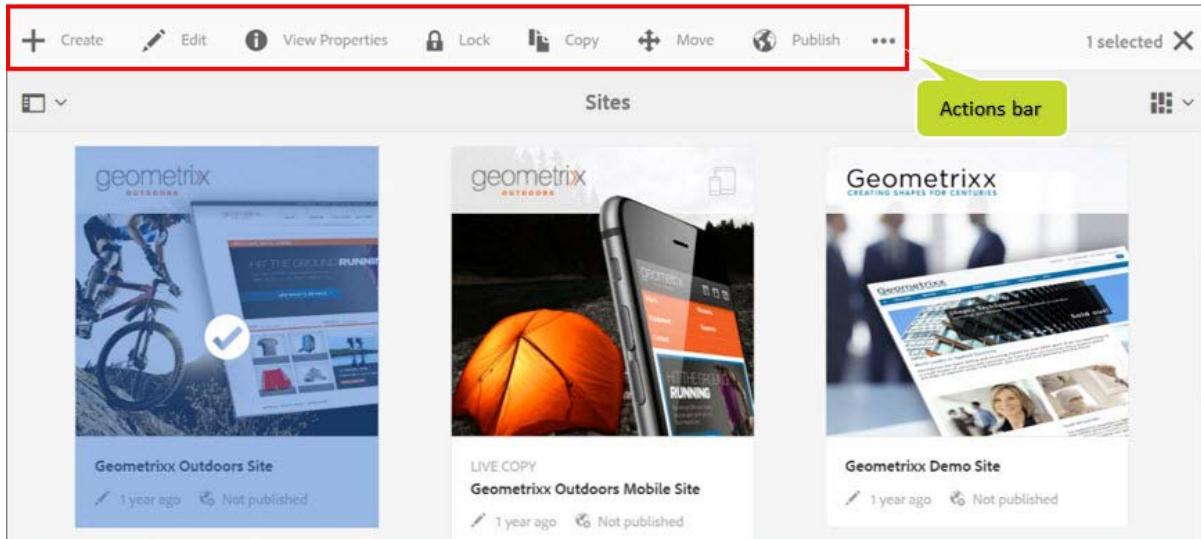
Create

List View icon

Title	Modified	Published
Campaigns		Not published
Screens		Not published
Community Sites		Not published
Geometrixx Outdoors Site	1 year ago Administrator	Not published
Geometrixx Outdoors Mobile Site LIVE COPY	1 year ago Administrator	Not published

## Actions Bar

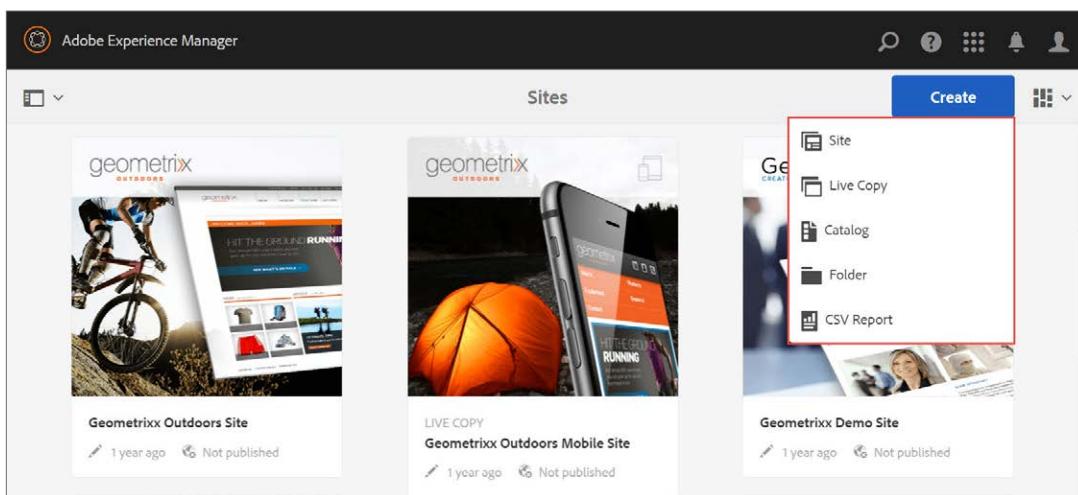
Within a console, different actions are available in the toolbar. Each action is represented as an icon associated with a label. The actions available depend on the console you are using, context, and selection mode.



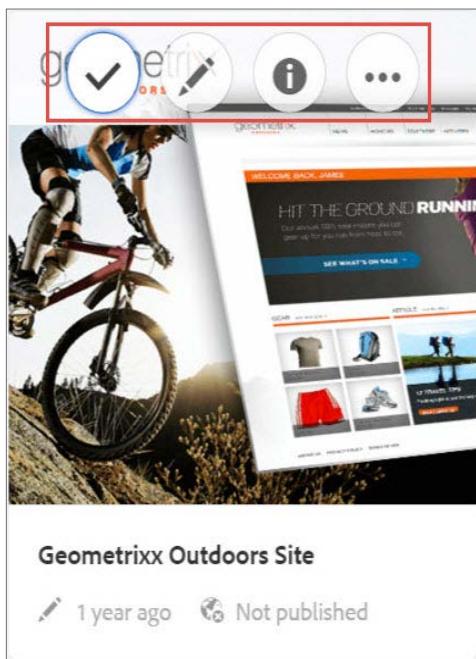
### Components of Actions Bar

The key components of the actions bar include:

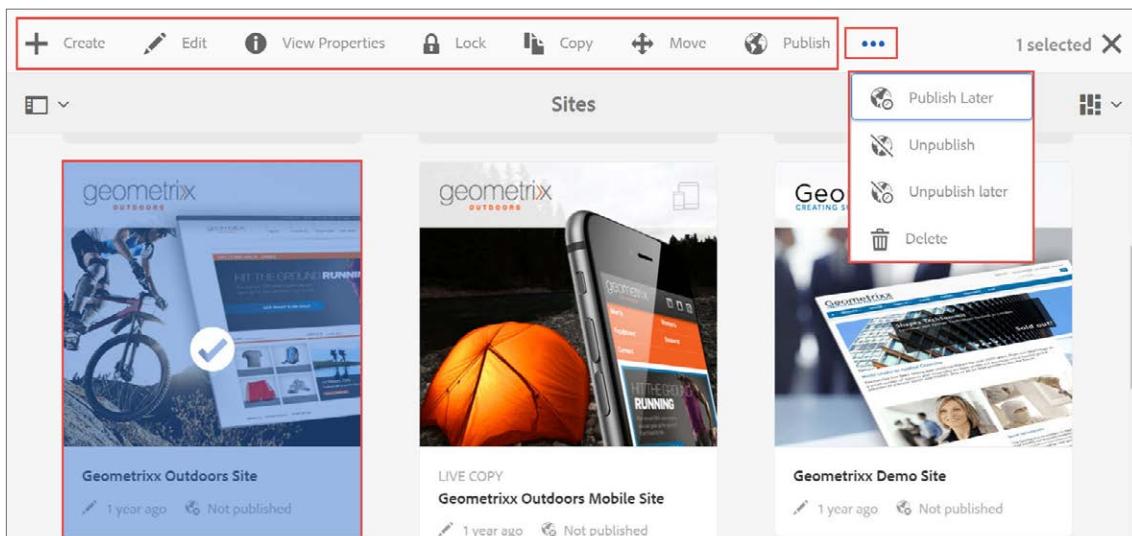
- **Create:** This button is the most frequently used and available in most consoles, such as Projects, Sites, Assets, and so on. Using this button, you can create a Page, Site, Live Copy, Launch, Catalog, Folder, and so on.



- **Quick Actions:** Few actions such as Select, Edit, View Properties, and More (Publish, Copy, and Move) are visible when you touch-and-hold or hover the resource in **Card View**.



- › **Select:** This icon is used to perform additional actions on the selected resource. In selection mode, when you select one or more resources (for example, a page or an asset), the icons in the toolbar change to reflect the actions available for the selected resource. Some of the actions include Edit, View Properties, Move, and so on.



## Left Rail

The rail icon toggles to open and close the left navigation panel. The options presented depend on the current console. For example, in **Sites** console you can select **Content Only** (the default), the **Timeline**, **References**, or **Filters** side panel.

The screenshot shows the Adobe Experience Manager Sites console. The top navigation bar includes the AEM logo and the title "Adobe Experience Manager". Below the navigation bar is a toolbar with icons for Create, Edit, View Properties, Lock, Copy, Move, and a selection status of "1 selected". On the far right of the toolbar is a close button. To the left of the toolbar is a rail icon (a square with a horizontal line) which is highlighted with a red box. The main content area is titled "Sites" and has a sub-section titled "Modified". The left rail panel, also highlighted with a red box, contains four items: "Content Only" (selected), "Timeline", "References", and "Filter". Below the rail panel, the main content area displays a list of sites under "Community Sites". The list includes:

- Geometrixx Outdoors Site (modified 2 years ago by Administrator)
- Geometrixx Outdoors Mobile Site (modified 2 years ago by Administrator, labeled "LIVE COPY")
- Geometrixx Demo Site (modified 2 years ago by Administrator)

## Components of Rail

Let's look into key components of Rail in detail.

- **Timeline:** Used to view and/or initiate events that occurred on the selected resource.

The screenshot shows the Adobe Experience Manager Timeline component for a selected page titled "Square". The top navigation bar includes the AEM logo and the title "Adobe Experience Manager". Below the navigation bar is a toolbar with icons for Create, Edit, View Properties, Lock, Copy, Move, and a selection status of "1 selected". On the far right of the toolbar is a close button. To the left of the toolbar is a rail icon (a square with a horizontal line) which is highlighted with a red box. The main content area is titled "Timeline" and has a sub-section titled "Show All". The left rail panel, also highlighted with a red box, contains three items: "Page created", "Page edited", and "Comment". The "Page created" item is expanded, showing a message from "Administrator" 3 minutes ago. The "Page edited" item is expanded, showing a message from "Administrator" 2 minutes ago. The "Comment" item is expanded, showing a message from "Administrator" 1 minute ago. A comment input field with the placeholder "Does this cover all the services?" is also visible. To the right of the rail panel, the main content area displays a preview of the "Square" page. The page features a large image of a snowboarder, several text blocks, and a "Services" section at the bottom.

- › You can view events related to a selected item. For example, in the **Sites** console, select a page, and then click **Timeline**. You can then view all the event types of the selected page from the **Show All** dropdown in the side panel.

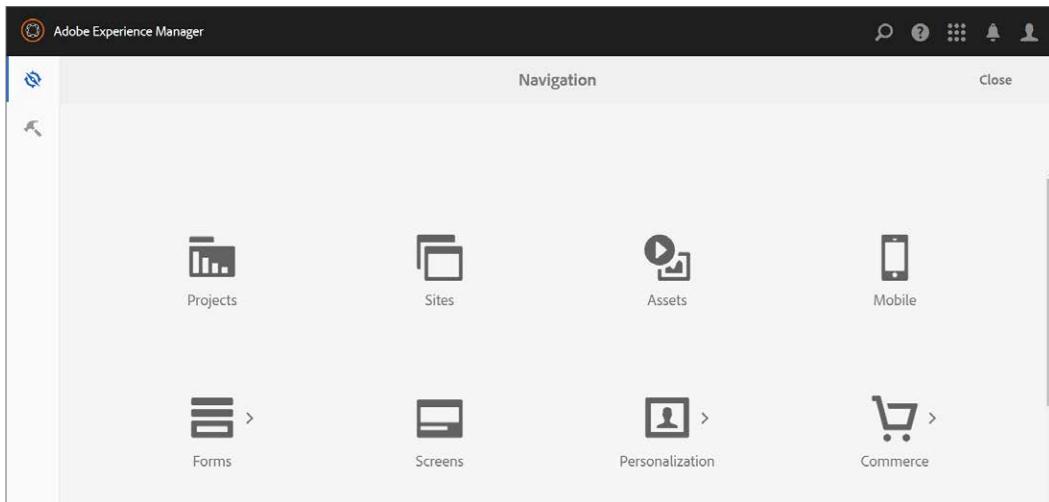
The screenshot shows the Adobe Experience Manager (AEM) Sites console interface. At the top, there are standard navigation icons: Create, Edit, View Properties, Lock, Copy, and a three-dot menu. To the right, it says "1 selected" with a delete icon. Below these are the main content area and the side panel. In the side panel, under the "Timeline" section, there is a dropdown menu labeled "Show All" which is also highlighted with a red border. A green callout bubble with the text "Click Show All to view event types" points to this dropdown. The main content area displays a preview of a page titled "Geometrixx" with various sections like Content, Services, and a timestamp of "2 minutes ago".

- **References:** Shows all the connections of the selected resource. For example, in the **Sites** console select a page, and then click **References**. All the page references such as Source, Copies, Links, and Content References display in the side panel.

The screenshot shows the AEM Sites console with the "References" view selected. The left sidebar, which contains the reference categories, is highlighted with a red border. The categories listed are SOURCE, COPIES, and CONTENT REFERENCES. Under SOURCE, "Blueprint (1)" is listed. Under COPIES, "Live Copies (1)" and "Language Copies (1)" are listed. Under CONTENT REFERENCES, "Borrowed Content (0)" and "Lent Content (0)" are listed. The main content area displays two pages: "Equipment" and "Hiking", each with a timestamp of "2 years ago" and a status of "Not published".

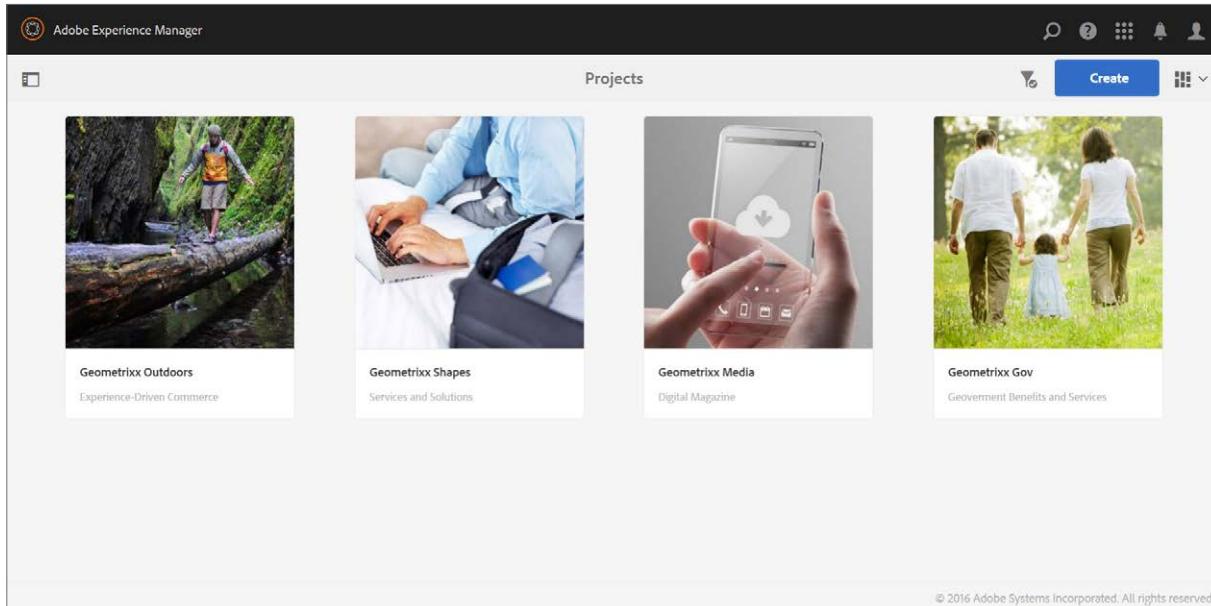
## Consoles of Touch UI

The functionality of Adobe Experience Manager is made available through specialized consoles, which you can access from **Product Navigation**.



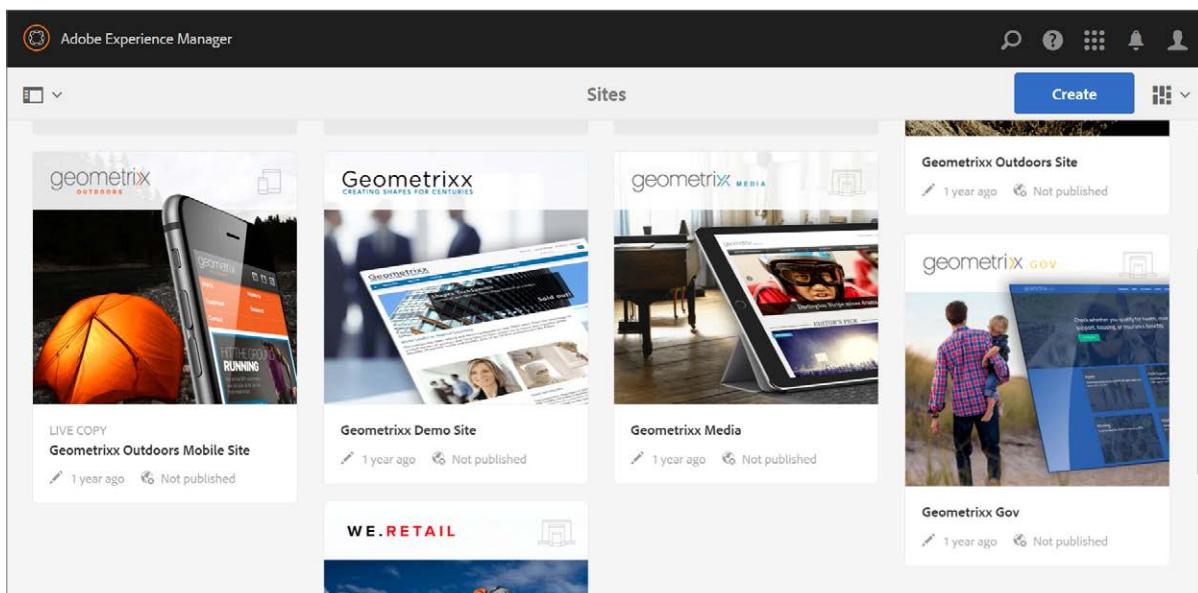
## Projects

The Projects console gives you direct access to your projects. It is also called the Welcome screen for the Touch UI. In this console, you can create a project, associate resources, workflows, and tasks with the project, allowing you to work on a common goal.



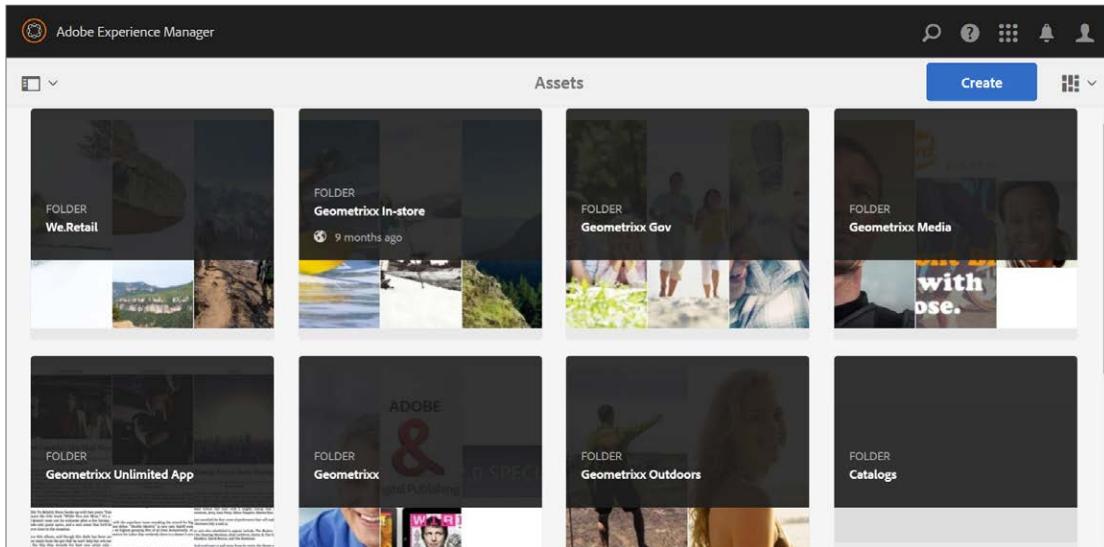
## Sites

The Sites console lets you create, view, and manage websites running on your Adobe Experience Manager instance. Through this console, you can create, copy, move, and delete web pages, start workflows, and activate (publish) pages. You can also open a page for editing.



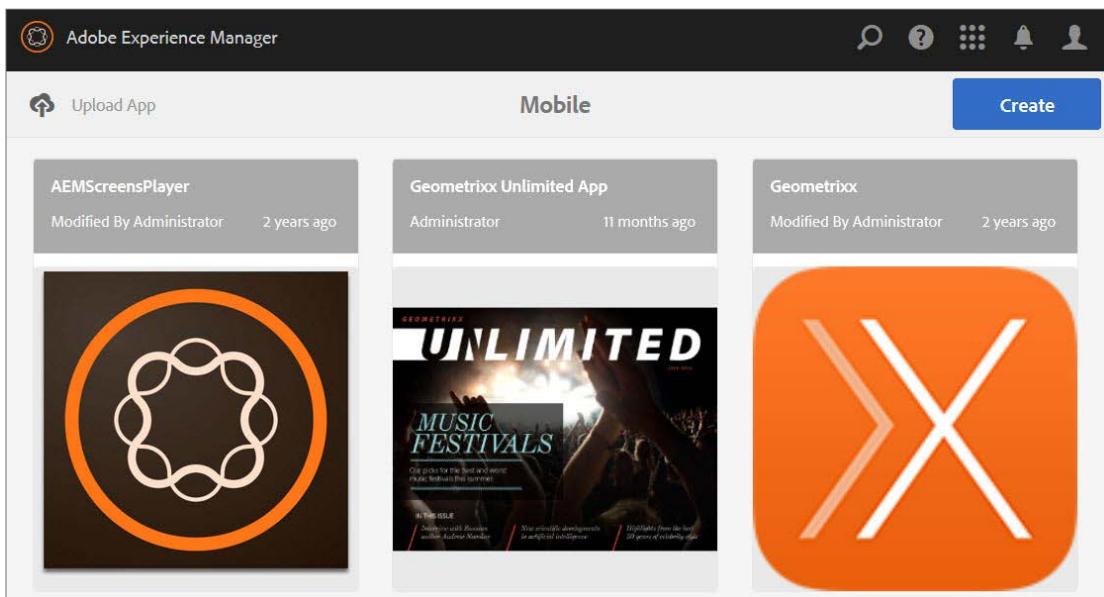
## Assets

The Assets console lets you import and manage digital assets such as images, videos, documents, and audio files. These assets can then be used by any website running on the same Adobe Experience Manager instance.



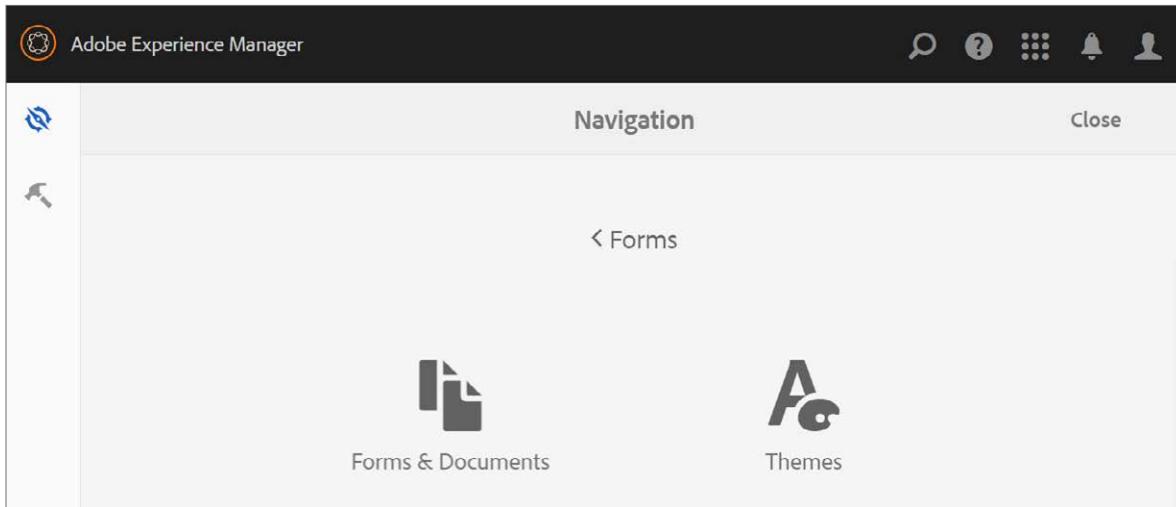
## Mobile

The Mobile console allows you to manage your mobile applications. It allows you to develop sites for mobile devices and integrate your content into mobile applications.



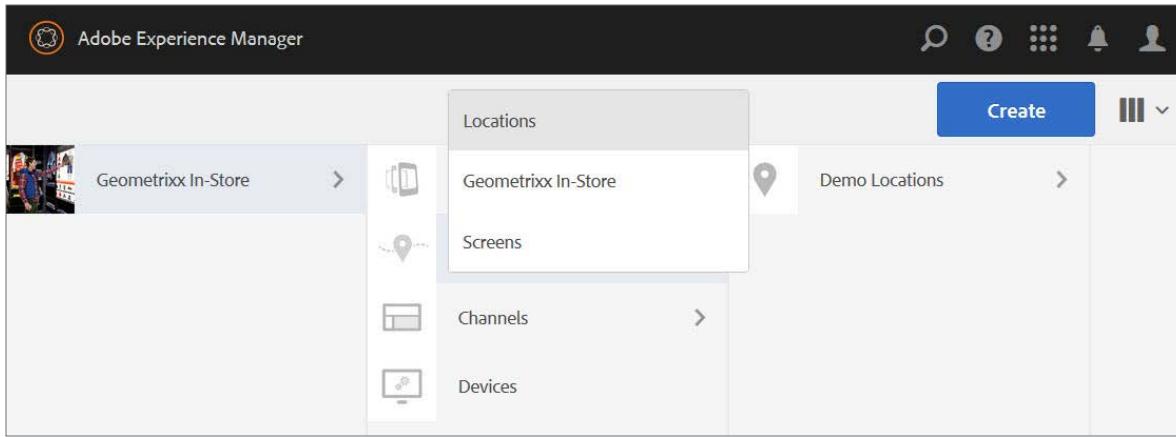
## Forms

The Forms console allows you to create and manage adaptive forms. The capability of Adobe Experience Manager Forms allows the administrators and developers to manage forms and their assets.



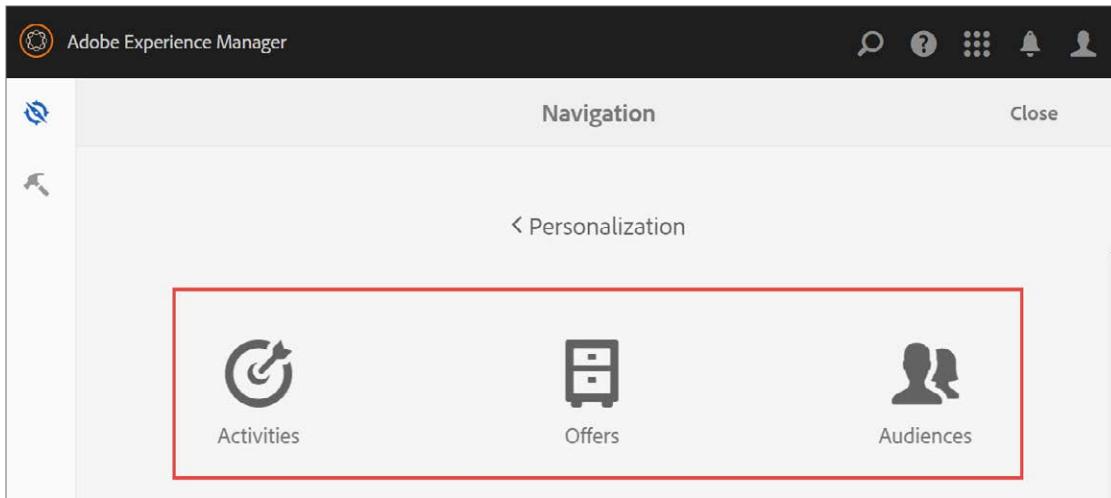
## Screens

The Screens console allows you to manage all your customer-facing screens, of any size and in any location.



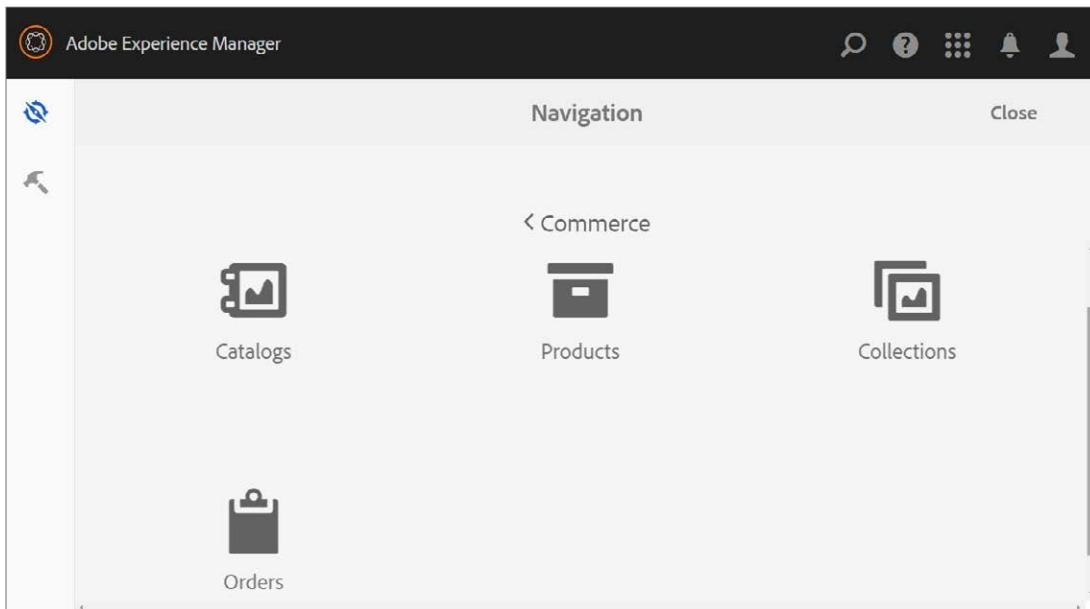
## Personalization

The Personalization console provides a framework of tools for authoring targeted content and presenting personalized experiences.



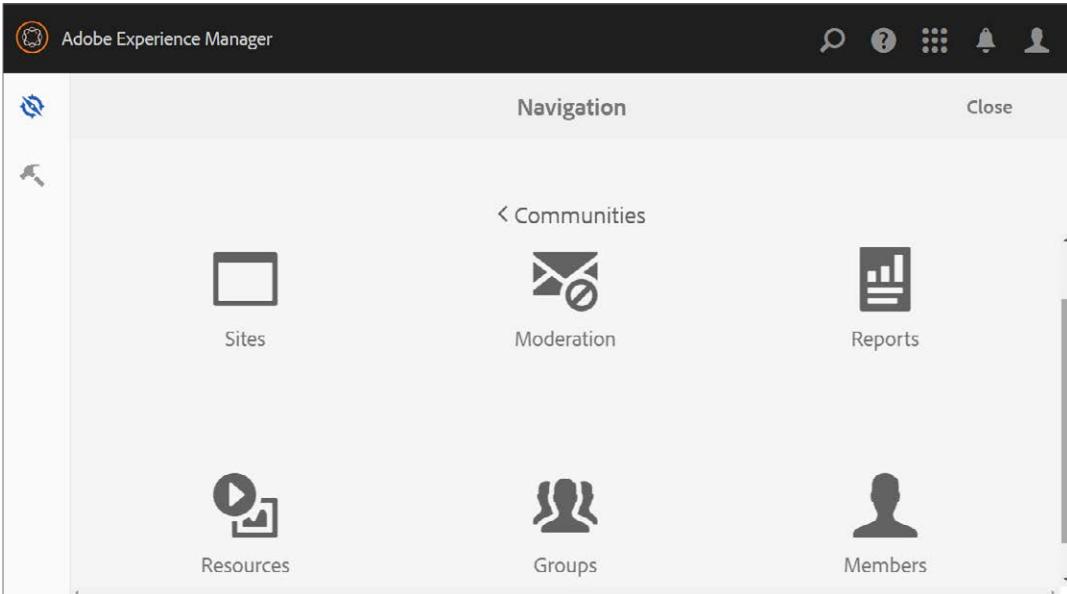
## Commerce

The Commerce console allows you to manage products, product catalogs, and orders related to your commerce sites.



## Communities

The Communities console allows you to manage and moderate your community forums.



# Interface Elements of a Page

Adobe Experience Manager Pages are similar to web pages and can be created from the **Sites** console.

Let's look at the key interface elements of a page. When you open a page for editing within a site from the **Sites** console, you can view the following:

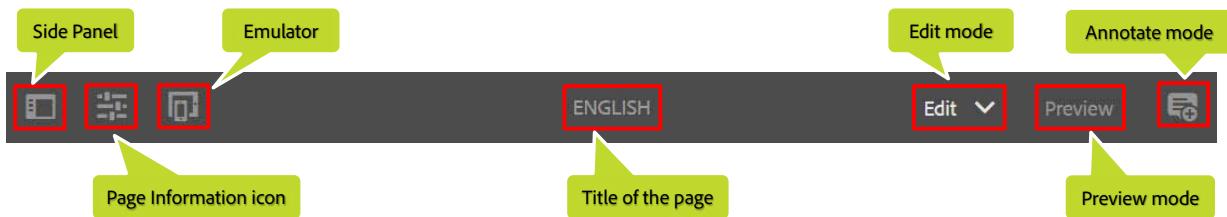
- Page toolbar
- Content frame



## Page Toolbar

The page toolbar is at the top of the page. It holds the following information and options:

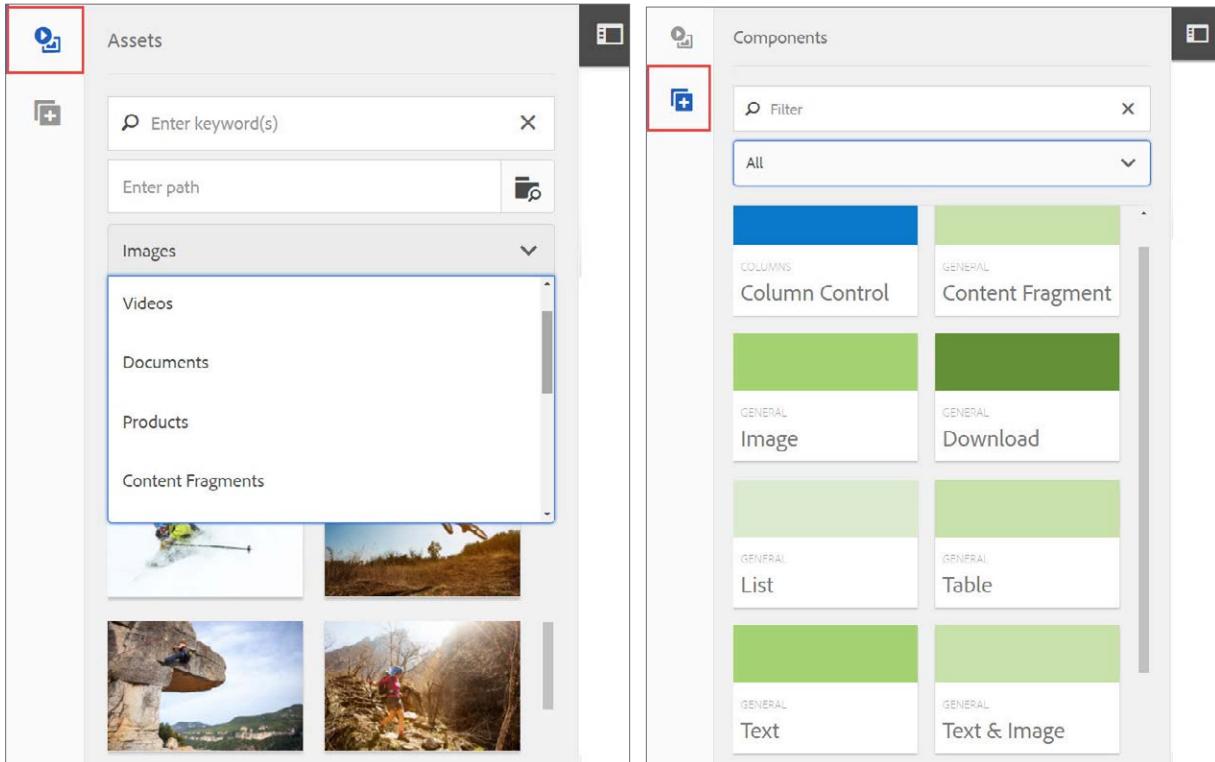
- Side Panel—holds assets and components browsers
- Page Information icon—gives information about the page and actions you can take on the page
- Emulator—simulates the environment in which an end-user will view the page, for example on a mobile device
- Title of the page
- Edit mode—which gives the list of modes available for a page
- Preview mode—which displays the page as it appears in Publish instance.
- Annotate mode—which allows you to add annotations to the page



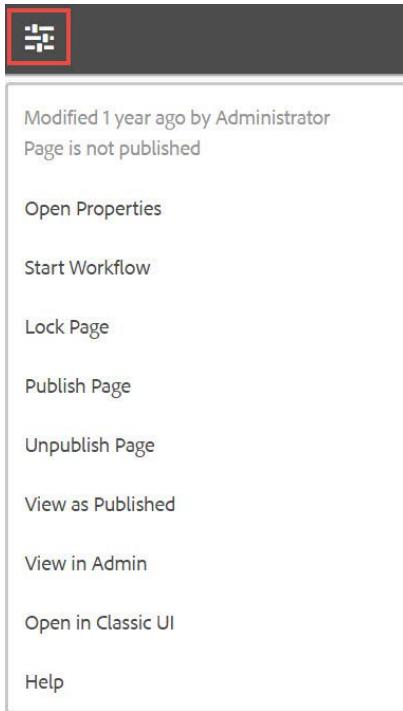
## Components of the Page Toolbar

The components of the page toolbar are:

- **Side Panel**—consists of Assets (digital documents, images, videos, and audios) and Components (add various types of content to a page) browsers, which are visible when you open the page for editing.

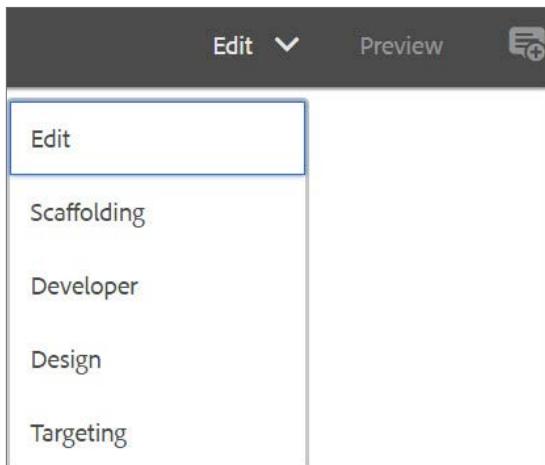


- **Page Information**—offers the following details about a page, which you can use while editing the page.



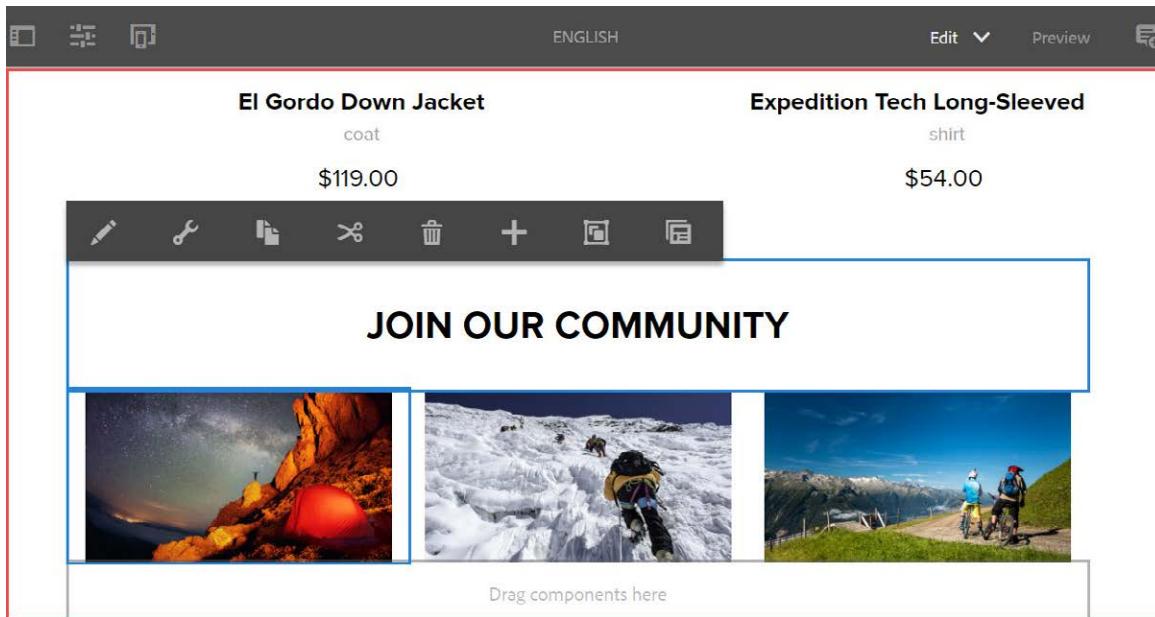
Page Information options	Description
Open Properties	Displays page properties
Start Workflow	Adds a current page to the workflow
Lock Page	Locks a page for editing
Publish Page	Publishes a page
Unpublish Page	Unpublishes a published page
View as Published	Displays the page as published
View in Admin	Displays a page in Sites console
Open in Classic UI	Opens a page in Classic UI
Help	Displays page authoring quick tour

- **Modes**—When you open a page for editing, click **Edit** from toolbar. You can view the following modes available for a page beside Edit (Preview and Annotate) and also from the drop-down.
  - › **Edit**: This mode allows you to edit the page and add or delete the components from the page.
  - › **Scaffolding**: This mode allows you to create a form with fields that define the structure of the page. You can use this as a template to create new pages.
  - › **Developer**: This mode allows you to test the functionality of the user interface.
  - › **Design**: This mode allows you to define the components that are available while editing a page.
  - › **Targeting**: This mode highlights how to use analytics and recommendations from various sources to create better content for your users.
  - › **Preview**: This mode displays the page as it appears in the Publish instance.
  - › **Annotate**: This mode allows you to annotate a page for the review and commenting process.

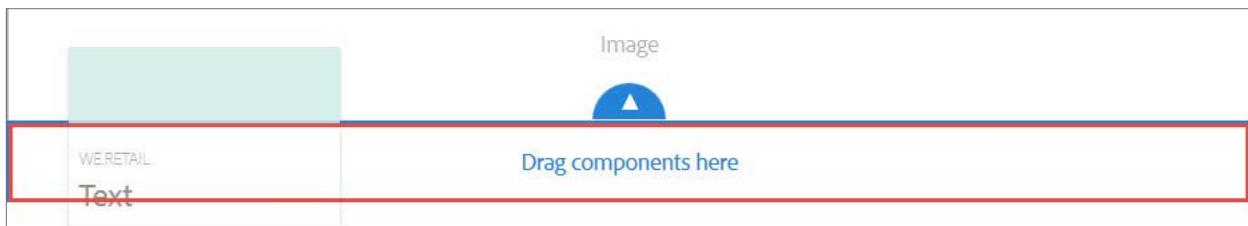


## Content Frame

Content frame is in the right section of the window under the page toolbar. It renders page content and is completely independent of the editor.

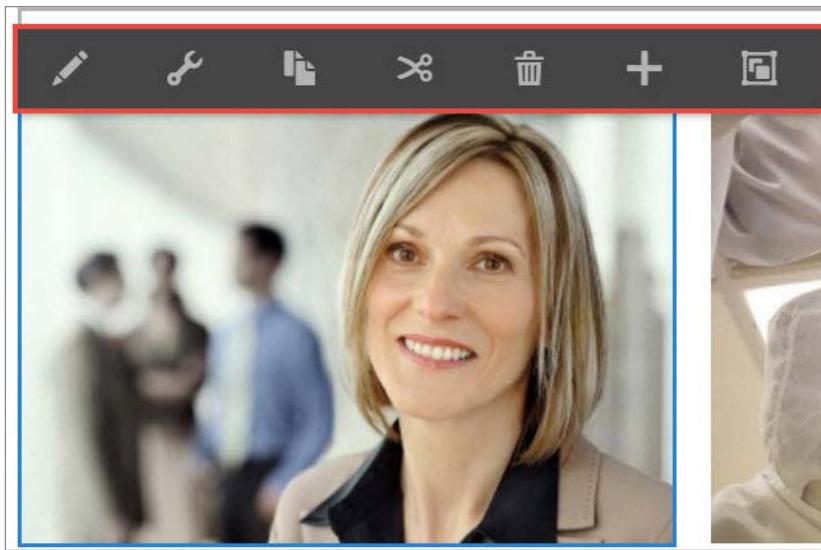


- **Component Placeholder:** This is an indicator (**Drag components here**) to show where a component will be positioned when you drop it - above the component you are currently hovering over.



- **Component Toolbar:**

- › Each component will reveal its toolbar when clicked (either once or with a slow double-click).
- › The toolbar contains the specific actions (copy, paste, open-editor, and so on) that are available for the components on the page.
- › Depending on the space available, the component toolbars are positioned at the top-, bottom-, and right-corner of the appropriate component.



- Component toolbar icons with labels

	Edit		Configure
	Copy		Help
	Cut		Done
	Group		Toggle Full screen
	Delete		Cancel
	Parent		
	Cancel Inheritance		

## Summary

You should now be able to:

- List the key elements of Touch UI
- Explain various Touch UI consoles
- List the key interface elements of a page

## Chapter Two

# Basic Authoring Skills

## Overview

This module exposes you to use to the range of tools that Adobe Experience Manager provides for authoring content such as creating, editing, and deleting a page, adding assets, editing responsive page layout, performing actions on a page, and using workflows to complete business processes.

## Objectives

By the end of this chapter, you will

- Define the terminologies used in Adobe Experience Manager
- Create pages from templates
- Add various components to a page
- Author responsive pages
- Define various page properties
- Edit page properties
- Organize and manage assets
- Use content fragments in a page
- Illustrate various options used in reorganizing the site structure
- Use various page options to preserve and increase the content value
- Explain different ways of collaborating in Adobe Experience Manager

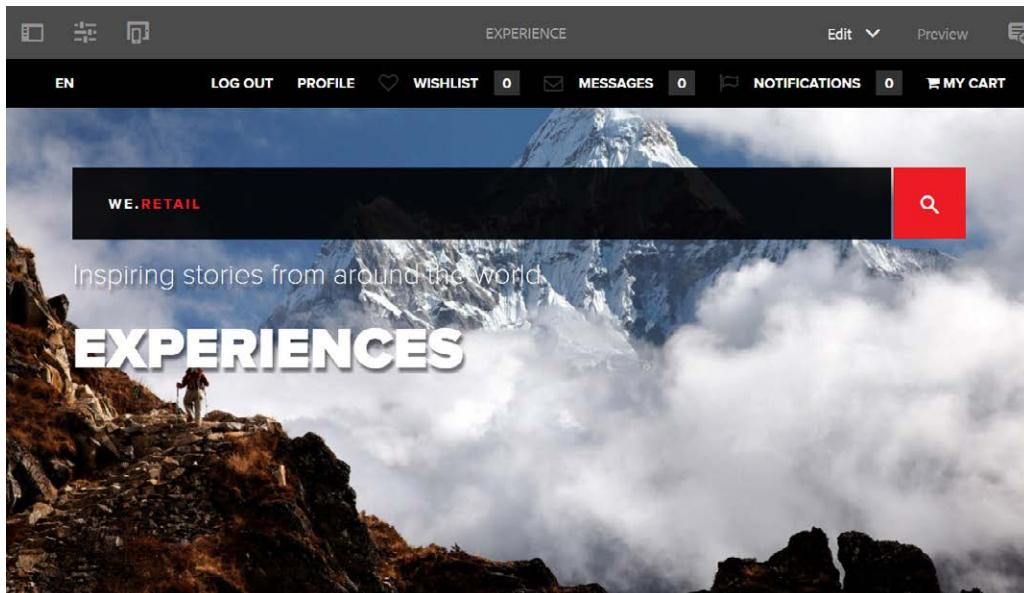
# Introduction

Adobe Experience Manager helps you build a website and add content to it through pages. You can create a page based on a specific template, and add content to it using components.

## Terminologies Used in Adobe Experience Manager

### Page

- › A page in Adobe Experience Manager is similar to a web page, which contains text and specifications about where to place images or other multimedia files on a page.
- › In Adobe Experience Manager, you can create a page within a site using the Create button from the actions bar.

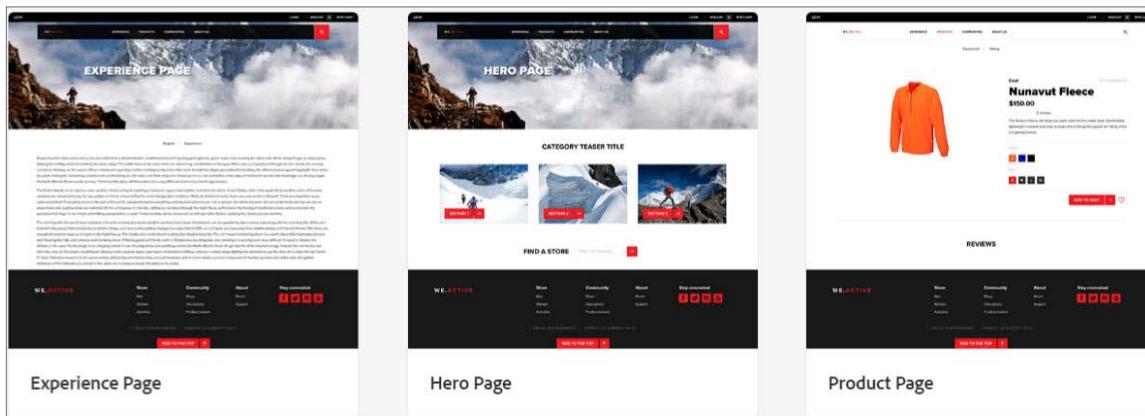


## Template

In Adobe Experience Manager, you use a template to create a page. A template defines which components you can use within the selected scope. A template has the same structure as the page you will create, but does not have any actual content.

A template:

- defines which components you can use within a page.
- is built of components.

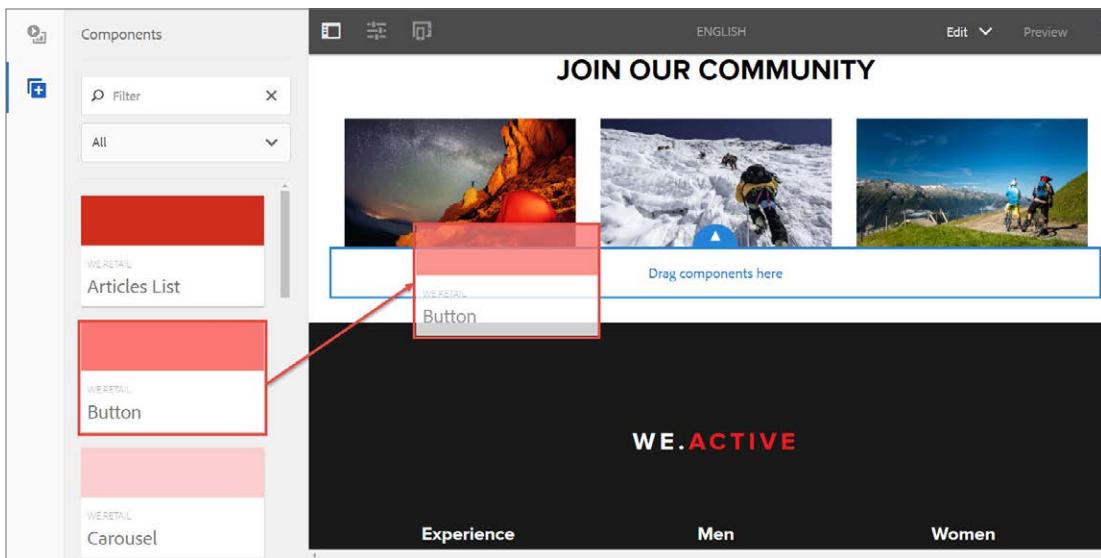


## Components

Adobe Experience Manager provides components, which are used to add specific types of content to the page.

Components have the following features:

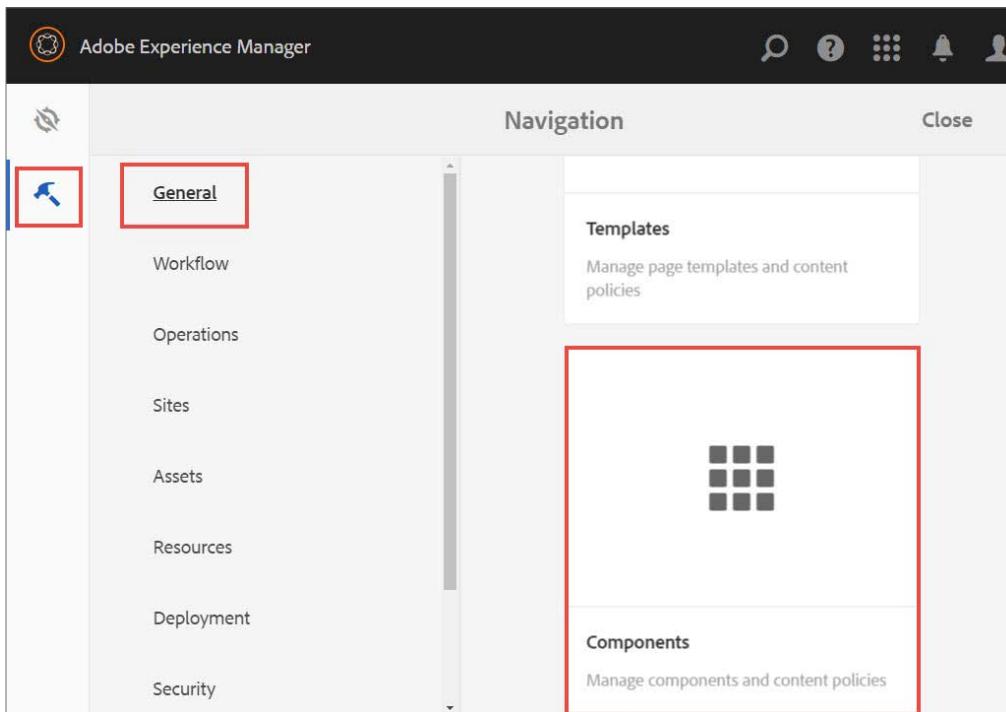
- Re-usable
- Developed as self-contained units within a repository
- Can contain other component
- Have a standardized user interface
- Use widgets – widgets are user interface elements that work across different browsers and allow the creation of desktop-grade UI experiences.



## Components Console

The Components console:

- Accessed from **Tools > General > Components**.



- Allows you to browse through all components defined for your instance and view key information for each component.

The screenshot shows the Adobe Experience Manager Components interface. The title bar reads "Components". The interface displays a grid of six components, each with a color-coded background and status information:

Component Type	Description
HIDDEN	AAM Segments Mapping trait (Deprecated)
HIDDEN	AAM Segment (Deprecated)
HIDDEN	Audience Manager Segments (Deprecated)
.HIDDEN	Audience Manager Traits (Deprecated)
COMMERCE	Abandoned Product Call To Action
CTA-LEAD-FORM	About

## Creating Pages

---

To organize a website within Adobe Experience Manager, you must first create and name your content pages, which allows for easy accessibility.

Before you add content, you must create a page within a site. You can create pages using templates. Adobe Experience Manager now offers two basic types of templates:

1. Editable templates—Created and edited by Template authors/Super authors, and used by Page authors
  2. Static templates—Defined and configured by Developers, and used by Page authors
- 

 **NOTE:** When using a template to create a new page, there is no visible difference (to the page author) and no indication of the type of template being used.

---

The key fields used while creating a page:

- **Title:** This is displayed to the user in the console and is at the top of the content page when editing. This field is mandatory.
  - **Name:** This is used to generate the URI (Uniform Resource Identifier). User input for this field is optional. If not specified, the name is derived from the title.
  - **Template:** A list of templates available for use when generating the new page.
- 

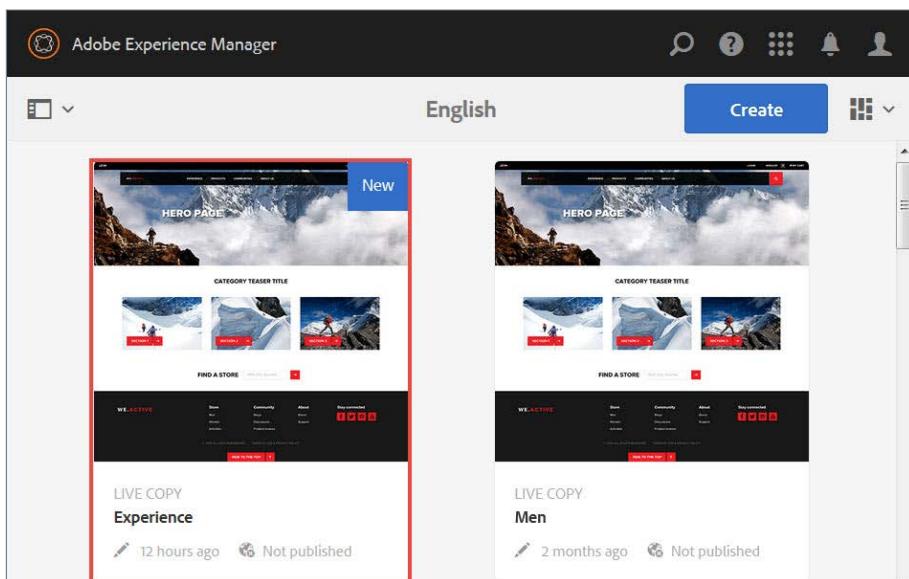
 **NOTE:** Only the following characters are allowed in the Name field: "a" through to "z", "A" through to "Z", "0" through to "9", \_ (underscore), and - (hyphen/minus).

---

## Creating a Page

To create a page within a site:

1. Navigate to **Sites** console and select a Site within which you want to create a page.
2. Click **Create > Page** from the actions bar.
3. Choose the desired template from the **Template** wizard, and then click **Next**.
4. In the **Properties** wizard, type desired **Name** and **Title**, and then click **Create**. A **Success** dialog box appears.
5. You can either click **Open** to view/edit the page or **Done** to navigate back to **Sites** console.



# Editing Pages

---

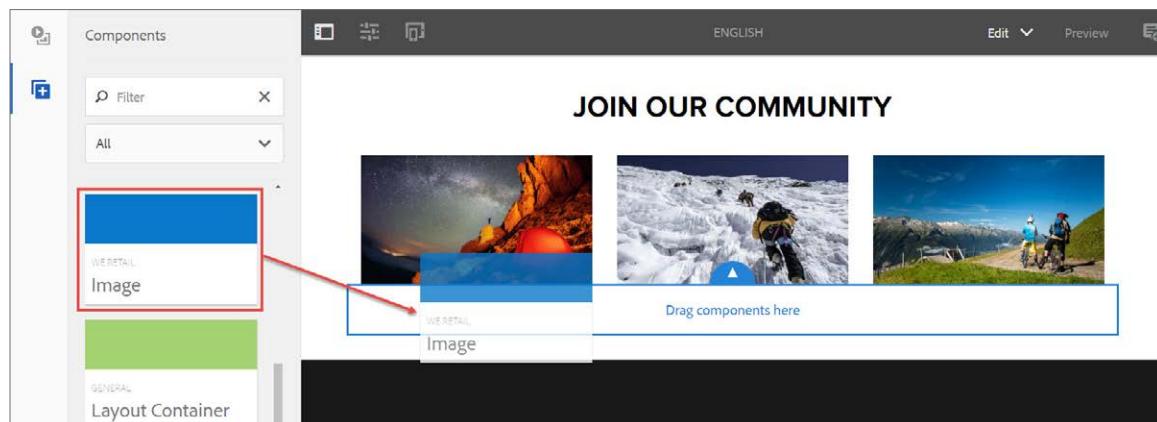
Once the page is created, you can edit the content of the page. Content is added using components, which you can drag and drop onto the page. You can add, edit, and delete components of the page.

## Editing Paradigm

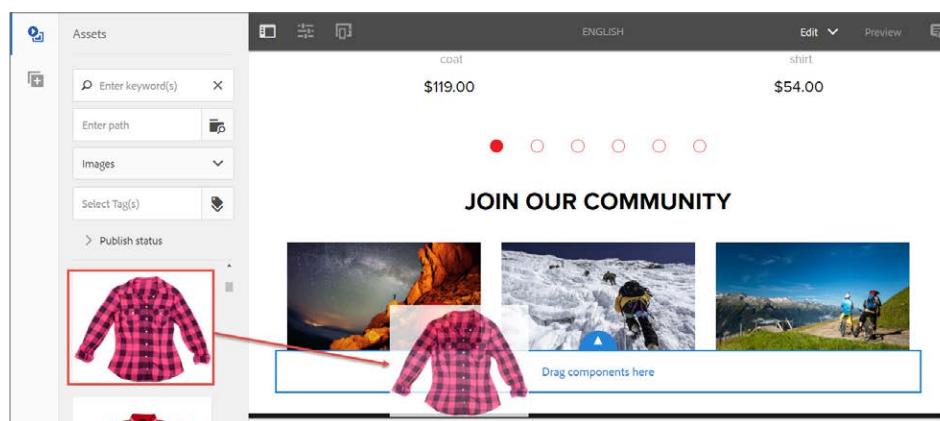
In Adobe Experience Manager, you can edit a page in the following ways:

### Drag and Drop

You can drag components (such as Text, Image, and so forth) by dragging and dropping them onto the **Drag components here** area of the page.

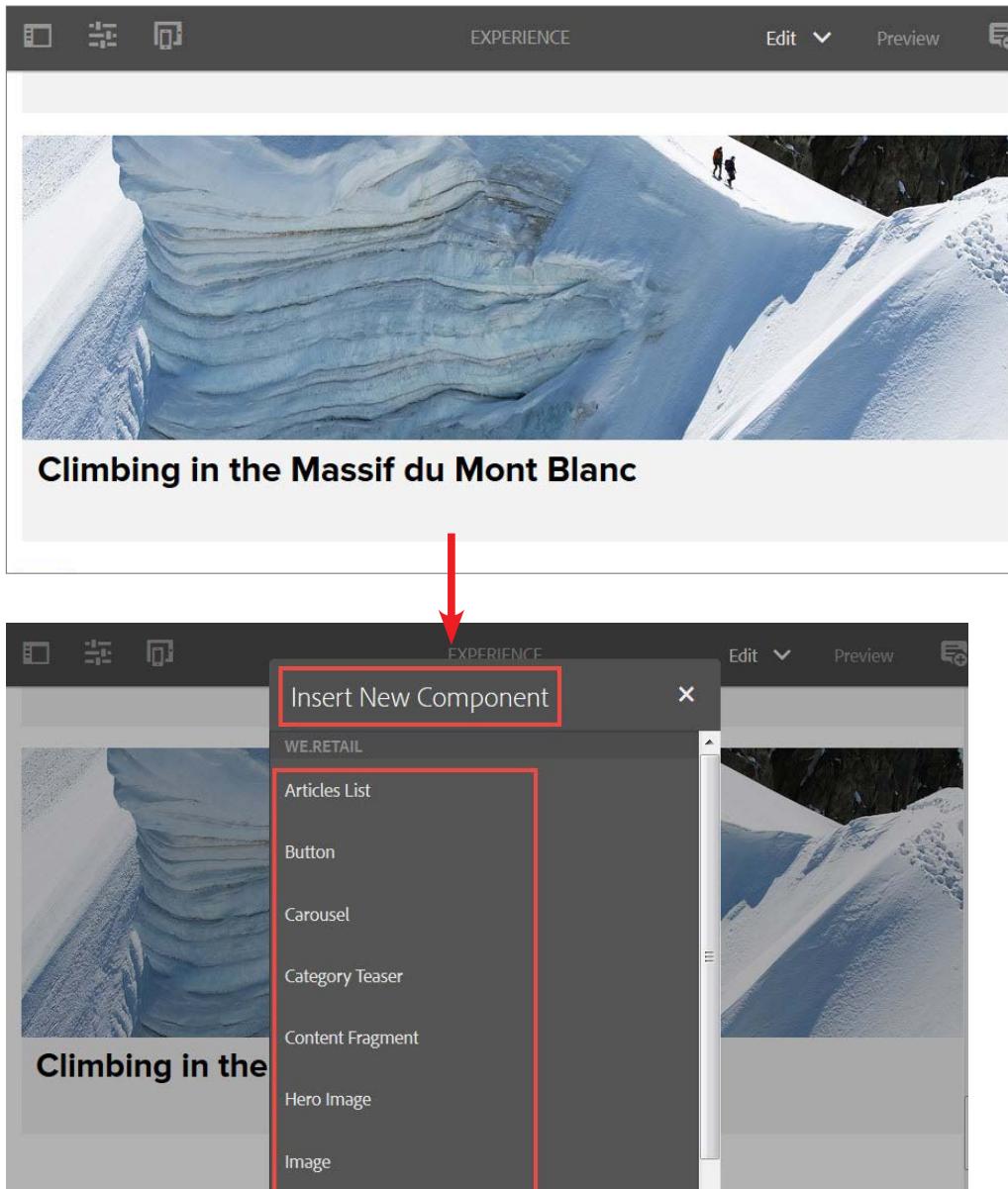


You can add an image to a page by dragging and dropping the image onto the **Drag components here** area.



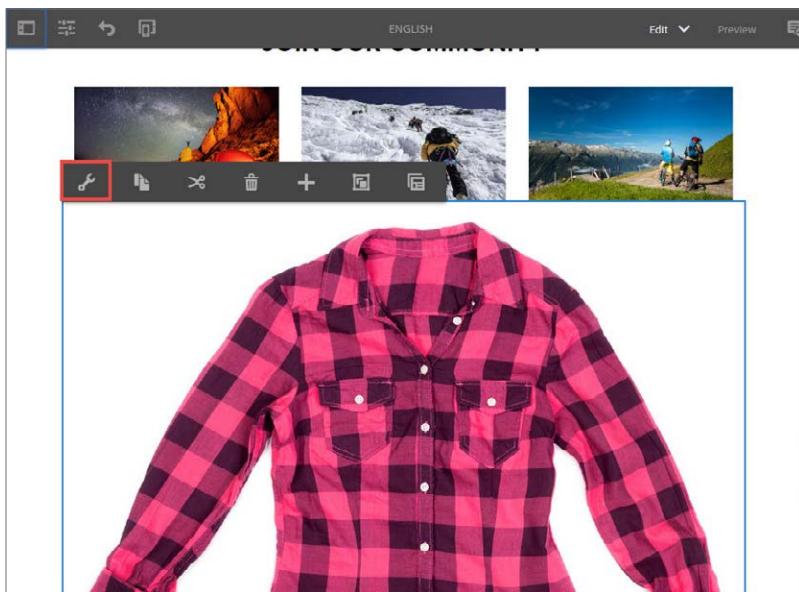
## Double-click

You can also add a component by double-clicking the **Drag components here** area, and then selecting the desired component from **Insert New Component** dialog.



## Edit the component

You can edit the characteristics of a component by selecting the component, and then clicking the **Configure** icon from the component toolbar. The Image dialog box opens with different options to edit the image.



Image

IMAGE ACCESSIBILITY

Image asset

Clear

Drop an asset here or [browse](#) for a file to upload.

Title

Link to

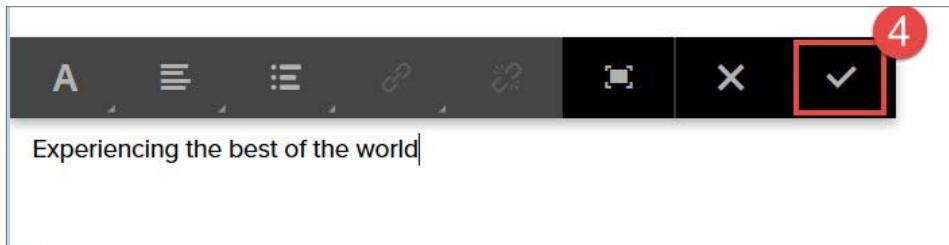
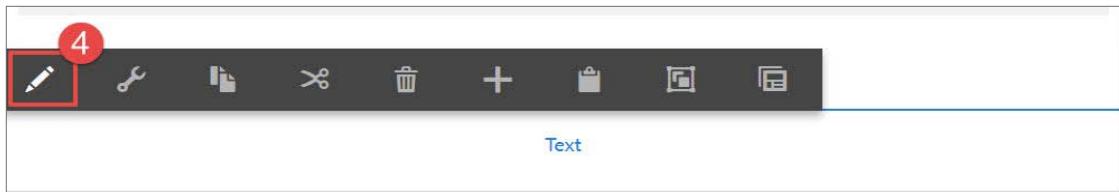
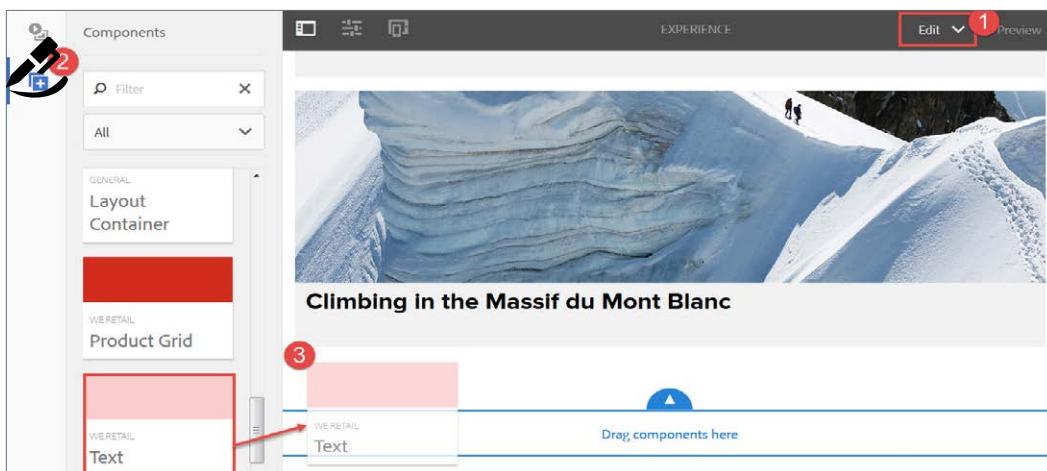
ADOBE COPYRIGHT PROTECTED

## Editing a Page

Now that you have created a page, let's see how to edit a page by adding content (text, image, and so on) to it.

To edit and insert a component in a page:

1. Make sure your page is in **Edit** mode.
2. Open the **Components** tab from the Side panel.
3. Drag a desired component onto the **Drag components here** area.
4. After you add a component, you can perform different actions on the component from the component toolbar.



Perform Task 1: Create and edit a page, from the Lab Activity section.

# Authoring Responsive Pages

It is increasingly important that websites offer customized views across devices--desktops, tabs, and mobile. You can achieve this in two ways:

1. Adaptive:  
The server response will change to adapt to a defined screen size.
  - a. Server-side device detection
  - b. Consequence: Different URLs for different devices
2. Responsive:  
The design will fluidly change and respond to fit any screen size.
  - a. Client-side feature detection through media queries
  - b. Consequence: Same content delivered to all visitors

## Responsive Design

Adobe Experience Manager enables you to create responsive sites that provide an optimal viewing experience for all visitors--across devices.

Responsive design provides:

- Easy reading and access to content
- Clear and easy navigation
- Minimum of resizing, panning, and scrolling across devices.



## Making Content Responsive

There are two ways you can make the content responsive:

1. Traditional workflow
  - a. A designer "mocks" the different breakpoints
  - b. A developer implements the mocks the breakpoints for a specific template
  - c. The author picks that template and fills in the content
2. Responsive layout editing
  - a. The author fills in the content
  - b. The author can adapt the layout

## Responsive Page Layout

Adobe Experience Manager allows you to add responsive layout for your pages by using the layout container component.

Adobe Experience Manager realizes responsive layout for your pages using a combination of mechanisms:

- Layout Container component—Provides a grid-paragraph system to allow you to add and position components within a responsive grid.
- Layouting Mode –Once the layout container is positioned on your page, you can use this mode to position content within the responsive grid.
- Emulator:
  - › Allows you to create and edit responsive websites that rearrange the layout according to device/window size by resizing components interactively.
  - › Allows the user to see how the content will render on different devices (for example, laptop or mobile phone).



 **Perform Task 2: Edit a responsive page, perform actions and preview the page in various emulators**, from the Lab Activity section.

# Page Properties

Pages have properties and are categorized into the following groups:

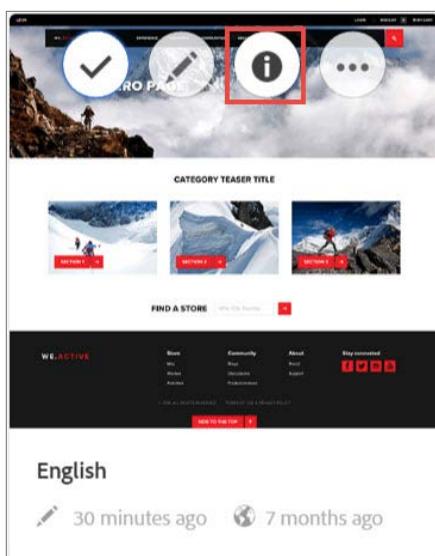
- Basic
- Advanced
- Thumbnail
- Cloud services
- Personalization
- Permissions

Advanced page properties include:

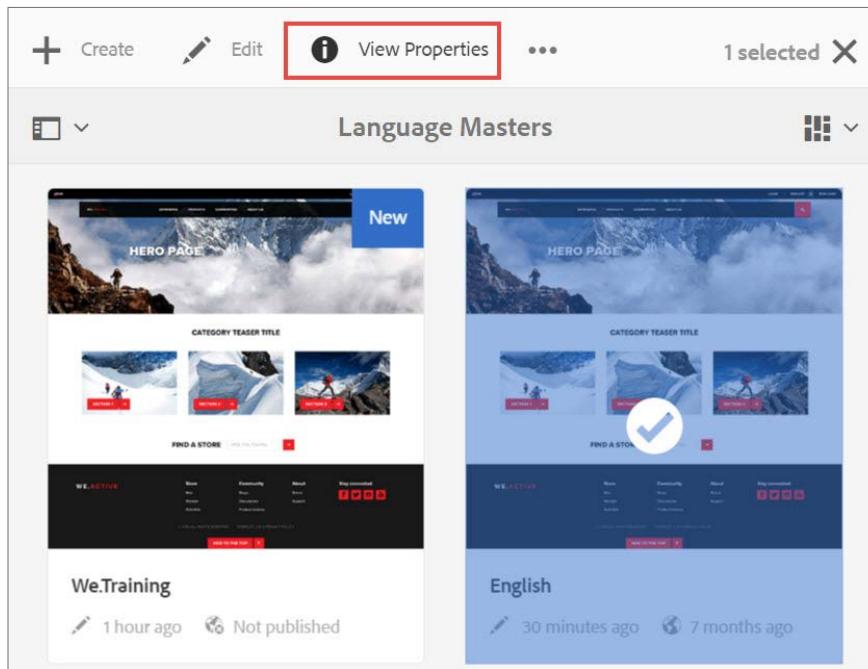
- Blueprint
- Live Copy
- Site Structure

You can view and edit the page properties using:

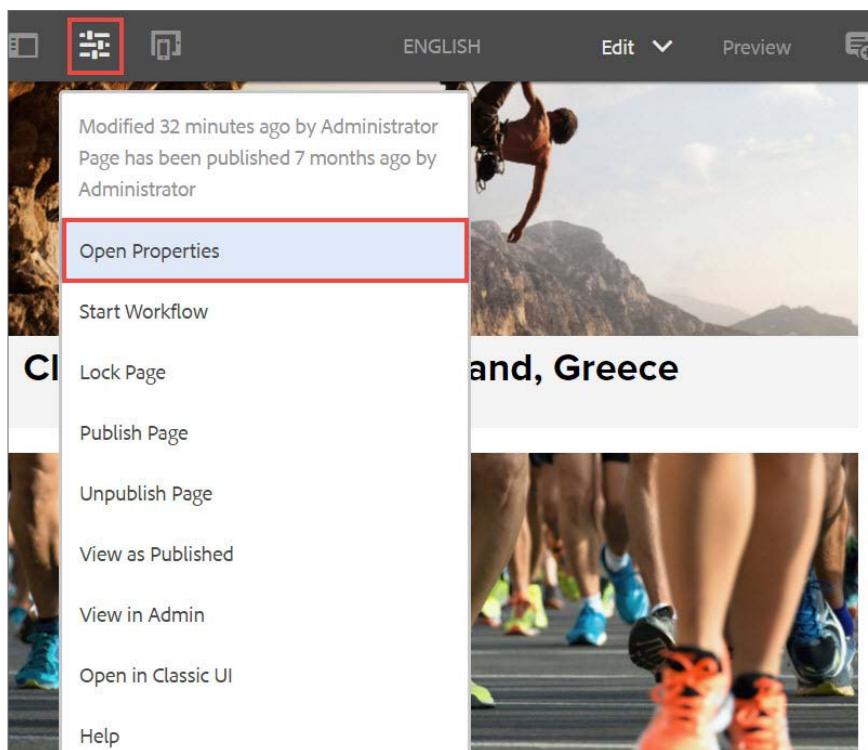
- Quick actions—In **Card View**, hover over a page, and then click **View Properties** from quick actions.



- Selection mode—In Card View, hover over a page and click **Select** from quick actions, and then click **View Properties** from actions bar.

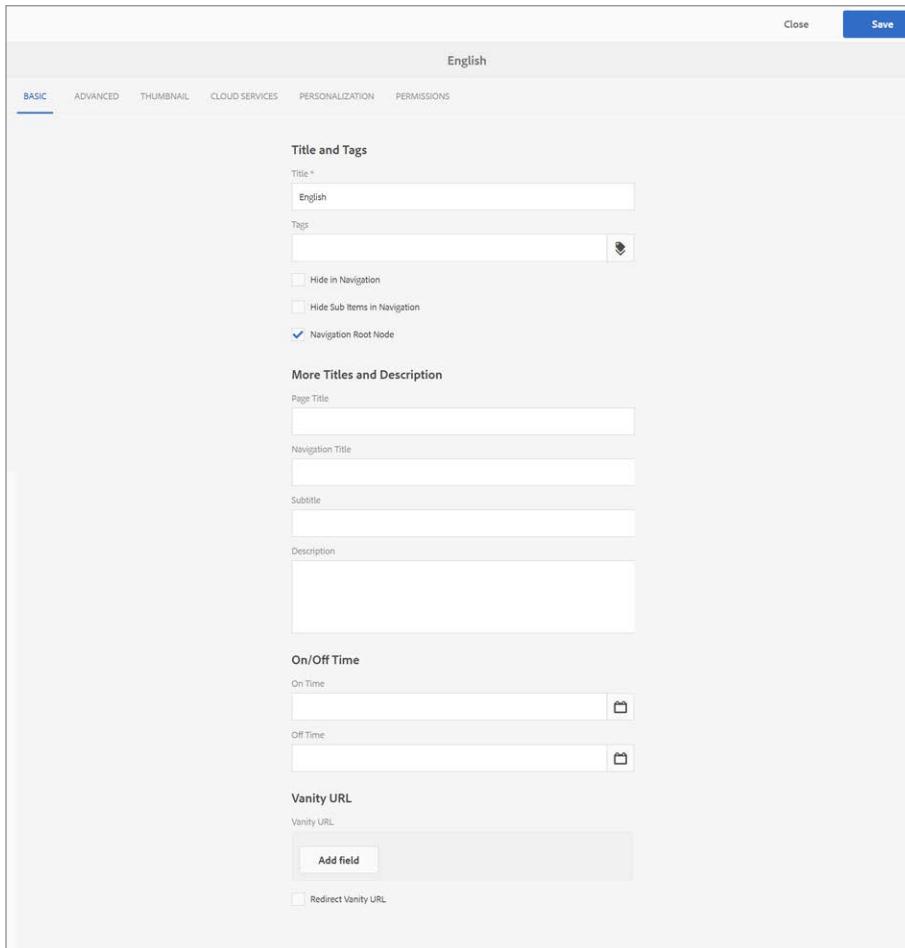


- Page Information—Open the page, click **Page Information** from the toolbar, and then click **Open Properties** from the drop-down.



Let's look at the different page properties using quick actions.

## BASIC



The screenshot shows the 'BASIC' tab selected in the AEM page properties dialog. The dialog is titled 'English'. At the top right are 'Close' and 'Save' buttons. Below the tabs are sections for 'Title and Tags', 'More Titles and Description', 'On/Off Time', and 'Vanity URL'. In the 'Title and Tags' section, the 'Title' field contains 'English'. Under 'More Titles and Description', fields for 'Page Title', 'Navigation Title', 'Subtitle', and 'Description' are present. In the 'On/Off Time' section, there are fields for 'On Time' and 'Off Time'. The 'Vanity URL' section includes an 'Add field' button and a checkbox for 'Redirect Vanity URL'.



NOTE: Title is a mandatory field.

Tab	Properties	Description
Basic	Title and Tags	
	Title	The title of the page seen in Sites card and other views
	Tags	To add or remove tags from the page
	Hide in Navigation	To indicate whether the page is shown or hidden in the page navigation
	More Titles and Description	
	Page Title	A title to be used on the page
	Navigation Title	To specify a separate title for use during navigation. If it is empty, the Title will be used
	Subtitle	A subtitle for use on the page
	Description	To describe the purpose of the page
	On/Off Time	
	On Time	The time at which the published page will be activated. When published, this page will be kept dormant until the specified time.
	Off Time	The time at which the published page will be deactivated
	Vanity URL	
	Vanity URL	To have a shorter and more expressive URL
	Redirect Vanity URL	To indicate whether you want the page to use the vanity URL



**TIP:** When adding a Vanity URL to a page, make sure the value is unique.

## ADVANCED

The screenshot shows the 'Advanced' configuration dialog in Adobe Experience Manager. The 'ADVANCED' tab is active. The interface includes a toolbar with 'Close' and 'Save' buttons, and tabs for 'BASIC', 'ADVANCED', 'THUMBNAIL', 'CLOUD SERVICES', 'PERSONALIZATION', and 'PERMISSIONS'. The 'ADVANCED' tab is highlighted.

**Settings**

- Language: A dropdown menu showing 'English'.
- Redirect: An input field with a browse icon.
- Design: An input field with a browse icon.
- Alias: An input field.

**Templates Settings**

- Allowed Templates: A list box with an 'Add field' button.

**Closed User Group**

- Enabled: A checkbox.
- Login Page: An input field with a browse icon.
- Admitted Groups: An input field with a browse icon.
- Realm: An input field with a browse icon.

**Export**

- Export Configuration: An input field with a browse icon.

Tab	Properties	Description
	Settings	
Advanced	Language	The language of the page
	Redirect	Indicates the page to which the current page should automatically redirect
	Design	Indicates the design used for this page
	Alias	Specifies an alias used with this page
	Templates Settings	
CLOSED USER GROUP	Allowed Templates	Define the list of templates that will be available within this sub-branch.
	Enabled	Enables (or disables) the use of Closed User Groups (CUGs)
	Login Page	The page used for logging in
	Admitted Groups	Groups eligible for logging in to the CUG
	Realm	The realm name for the CUG
	Export	
	Export Configuration	Specifies an export configuration

## Thumbnail

Close Save

English

BASIC ADVANCED **THUMBNAIL** CLOUD SERVICES PERSONALIZATION PERMISSIONS

Generate Preview Upload Image

Tab	Properties	Description
Thumbnail	Generate Preview	Generate preview of the page used as a thumbnail.
	Upload Image	Upload an image to use as thumbnail.

## Cloud Services

Close Save

English

BASIC ADVANCED THUMBNAIL **CLOUD SERVICES** PERSONALIZATION PERMISSIONS

Cloud Service Configurations

Add Configuration	+
Dynamic Tag Management	<span style="border: 1px solid #ccc; border-radius: 50%; padding: 2px 5px;">i</span>
Facebook Connect	<span style="border: 1px solid #ccc; border-radius: 50%; padding: 2px 5px;">i</span>
Microsoft Translator	<span style="border: 1px solid #ccc; border-radius: 50%; padding: 2px 5px;">i</span>
Translation Integration	<span style="border: 1px solid #ccc; border-radius: 50%; padding: 2px 5px;">i</span>
Twitter Connect	<span style="border: 1px solid #ccc; border-radius: 50%; padding: 2px 5px;">i</span>

Tab	Properties	Description
Cloud Services	Add Configuration	To provide the logic and structure for storing service configurations such as Microsoft Translator, Dynamic Tag Management, and so on

## PERSONALIZATION

The screenshot shows the 'PERSONALIZATION' tab selected in the top navigation bar. Below it, a 'Brand' section displays two entries: 'we.RETAIL' and 'Geometrixx Outdoors'. A blue button labeled 'Add Brand' with a plus sign is visible. The interface includes standard AEM navigation elements like 'Close' and 'Save' buttons.

Tab	Properties	Description
Personalization	Brand	Select a Brand to specify a scope of Targeting

## PERMISSIONS

The screenshot shows the 'PERMISSIONS' tab selected. A 'New Permission' dialog is open, prompting the user to 'Select user or group'. It lists several permissions that can be granted: 'Browse page', 'Edit content', 'Delete page', 'Publish/unpublish page', and 'Create sub-pages'. A 'Cancel' button and a blue 'Add' button are at the bottom of the dialog. The main interface includes 'Close' and 'Save' buttons.

Tab	Properties	Description
Thumbnail	Add Permission	Allows for the addition of permissions for different users/user groups and also update or delete the permissions
	Effective Permissions	Shows the permissions available for the page

## Advanced Properties

You can view BLUEPRINT and LIVE COPY properties, only if a site has Blueprint or Live Copy pages in it.

In Adobe Experience Manager, Multi Site Manager lets you create a site called Live Copy based on another site called Blueprint, when you want to have Multinational sites, multilingual sites, and Sites with different output channels.

### BLEUEPRINT

Tab	Properties	Description
Blueprint	Current Live Copies	Specifies the path of Live Copies associated with the Blueprint
	Rollout Configuration	Specifies the rollout configurations for the Blueprint

---

 **NOTE:** Blueprints let you push content changes to Live Copies. It provides a central location for administering the sites that use it as a source.

---

## LIVE COPY

Tab	Properties	Description
Live Copy	Source	The source page of the live copy page
	Status	The synchronization status of the live copy
	Configuration	Whether the page is still subject to live copy inheritance The rollout configuration that the live copy uses, and whether the configuration is inherited from the parent page

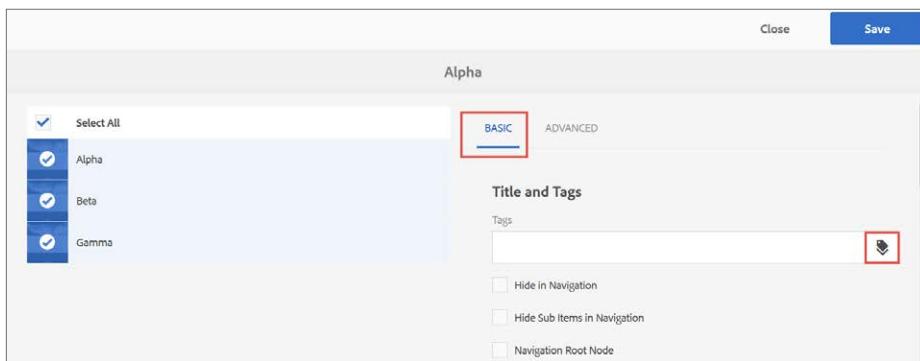
**DID YOU KNOW:** Live Copy status includes whether the live copy is up to date with the source, when the last synchronization occurred, and who performed the synchronization.

## Editing Bulk Page Properties

Adobe Experience Manager helps you edit properties of multiple pages and assets using a special feature called Bulk editing.

In Bulk editing, you can:

- Select multiple pages and add common properties to all the pages.
- Update values in the fields available. The new values will be applied to all the selected pages.
- Append a new value or remove a common value. Fields that are common, but have different values across various pages, are marked with a special value (for example, the text <Mixed Entries>).



**WARNING:** You can only bulk edit pages that share the same resource type and are not part of a live copy.

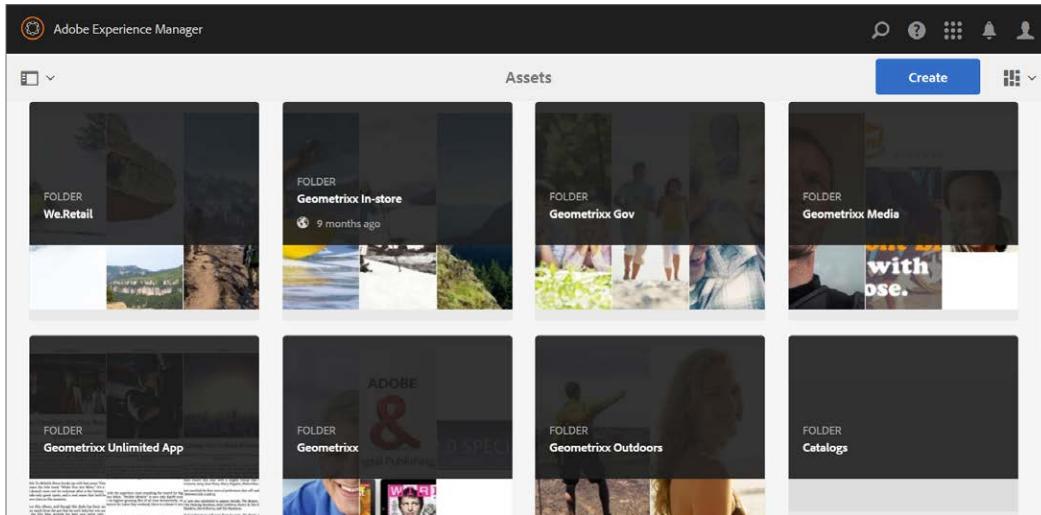


Perform **Task 3: Select multiple pages and add common properties to the pages**, from the Lab Activity section.

# Organizing and Managing Assets

An asset is a digital document, image, video, or audio (or part thereof) that can have multiple renditions and can have sub-assets (for example, layers in a Photoshop file, slides in a Power Point file, pages in a PDF file, and files in a ZIP). An asset essentially includes a binary, metadata, renditions, and sub-assets.

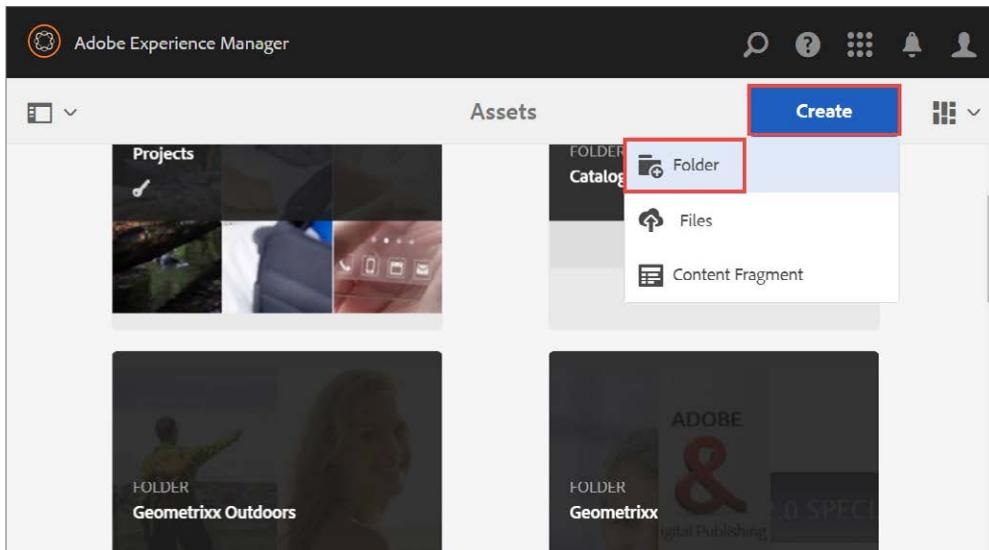
All the assets used in a website are grouped under the **Assets** console, which you can access from **Product Navigation**.



## Organizing Assets

You can organize assets in:

- **Hierarchical** manner using folders to impose a consistent storage structure for your digital assets.
  - › The folder can be public or private.
  - › You can create, organize, and group asset folders--related to a specific task.
  - › You can create asset collections so that all project assets are available in one directory.
  - › Based on the privilege level you assign, users can perform various tasks on the folder (for example, view assets within the folder or edit the assets).

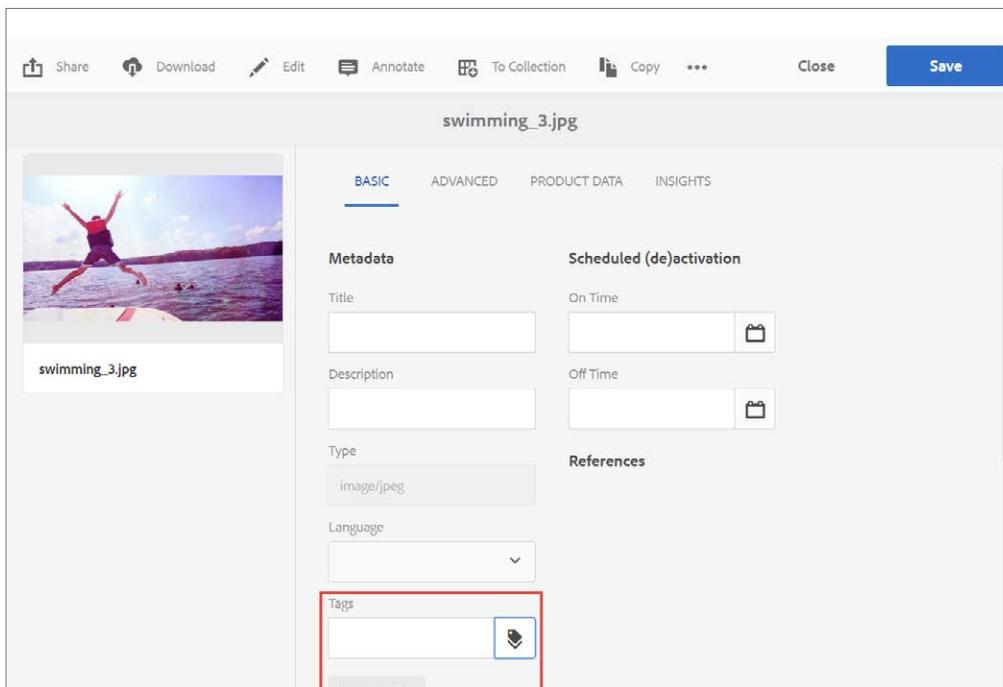


---

 **NOTE:** A private folder is accessible only to you. You can share your private folder to other users and assign different privileges to users.

---

- An **adhoc** manner, using tags.
  - › Users can edit tags in the Assets Editor where sub-assets, renditions, and metadata are displayed.



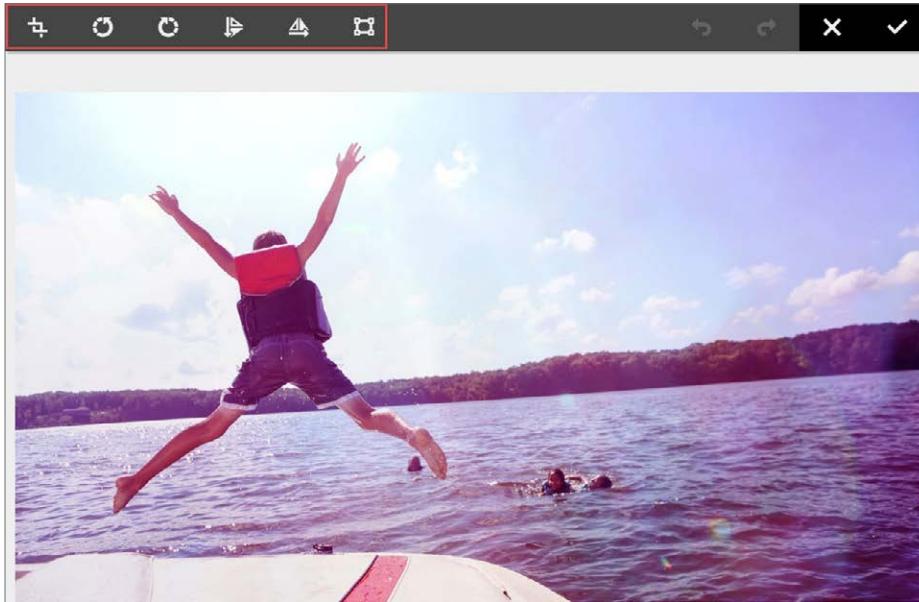
## Editing an Asset

To view or edit an asset, select the asset using **Select** button, and then click **Edit** from the actions bar.

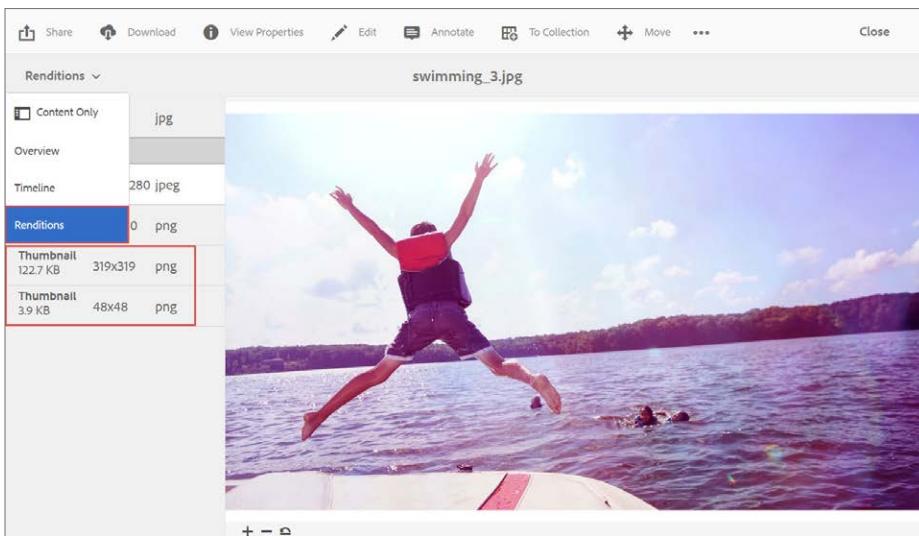
The screenshot shows the Assets interface with three assets selected: 'swimming\_3.jpg', 'swimming\_2.jpg', and 'swimming\_1.jpg'. Each asset card displays its type ('IMAGE'), name, creation date ('1 day ago'), size ('1.2 MB', '2.5 MB', '1.5 MB'), and dimensions ('1920 x 1080'). The 'Edit' button in the top navigation bar is highlighted with a red box. The top bar also includes 'Share', 'Download', 'View Properties', and a 'Dropzone' button.

You can edit assets using the Asset Editor, which has the following options:

- Resize images—you can crop, rotate, and flip an asset according to your needs.



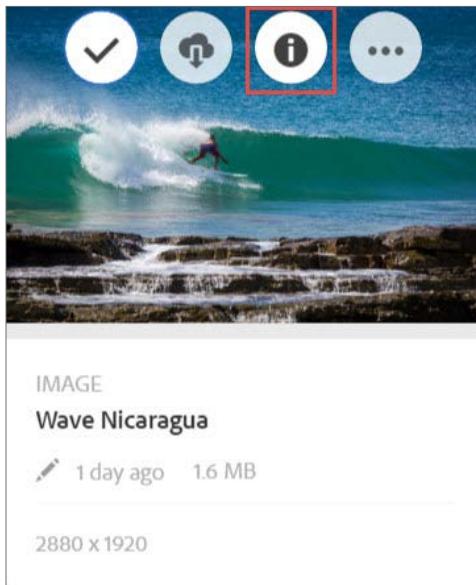
- View and upload renditions—you can create multiple views of an asset.



## Editing Asset Properties

You can view and edit asset properties using:

- **Quick actions:** Hover the cursor over an asset and click View Properties from quick actions.



- **Selection mode**—select an asset and click **View Properties** from the actions bar.

A screenshot showing two assets in selection mode. The assets are labeled "Surfing" and "Wave Huge". The first asset has a checkmark icon above it. The actions bar at the top includes Share, Download, a magnifying glass icon (View Properties) which is highlighted with a red box, three dots, and a selection count of "1 selected X". Below the assets, their details are listed:  
Surfing:  
IMAGE  
Wave Nicaragua  
1 day ago 1.6 MB  
2880 x 1920  
Wave Huge:  
IMAGE  
Wave Huge  
1 day ago 1.7 MB  
2880 x 1920

All the asset properties are categorized into:

## BASIC

- Metadata:
  - › Is data about your assets
  - › Is the information that is extracted when the asset is uploaded
  - › Allows you to manage your assets more efficiently
  - › Is information about the asset such as:
    - » Name
    - » Description
    - » Type
    - » Tags assigned
    - » Date created
- Scheduled (deactivation)—allows you to specify the time when an asset is activated and deactivated. Once an asset is activated, it is visible to the website visitor.
- References—links to resources using a particular asset.

The screenshot shows the Adobe Experience Manager asset editor interface. At the top, there are various toolbar icons: Share, Download, Edit, Annotate, To Collection, Copy, Move, Publish, and Unpublish. Below the toolbar, the asset title "Wave Nicaragua" is displayed above a preview image of a surfer on a wave. The main content area has tabs for BASIC, ADVANCED, PRODUCT DATA, and INSIGHTS, with the BASIC tab currently selected. The BASIC tab contains sections for METADATA, SCHEDULED (DE)ACTIVATION, and REFERENCES. The METADATA section includes fields for Title (Wave Nicaragua), Description (Surfing in Nicaragua), Type (image/jpeg), Language, Tags, Created (05-11-2016 18:36), Creator Tool (Adobe Photoshop CC 2015), Width (2880), Height (1920), Person, and Location. The SCHEDULED (DE)ACTIVATION section has On Time and Off Time fields with calendar icons. The REFERENCES section shows two entries under Referenced By, both linking to Equipment.

## ADVANCED

- License—provides details regarding creator, contributor, copyright owner, usage terms, and expiry date.
- Rating—specifies the rating assigned to an asset.

Wave Nicaragua

BASIC ADVANCED PRODUCT DATA INSIGHTS

**License**

Creator  
Contributor  
Copyright  
Copyright Owner  
Usage Terms  
Expires

**Rating**

Your Rating: ★★★★★  
Rating (0 votes)  
Rating Breakdown:  
★ ★ ★ ★ ★ (0)  
★ ★ ★ ★ ★ (0)  
★ ★ ★ ★ ★ (0)  
★ ★ ★ ★ ★ (0)  
★ ★ ★ ★ ★ (0)

ID: 31159c37-731d-4a42-9ecc-fb79c5203

## PRODUCT DATA

- Specifies the product data details, if the asset is associated with any product.

Wave Nicaragua

BASIC ADVANCED PRODUCT DATA INSIGHTS

This digital asset is not associated with any product, currently. Hence, no Product Data is available.

Wave Nicaragua

## INSIGHTS

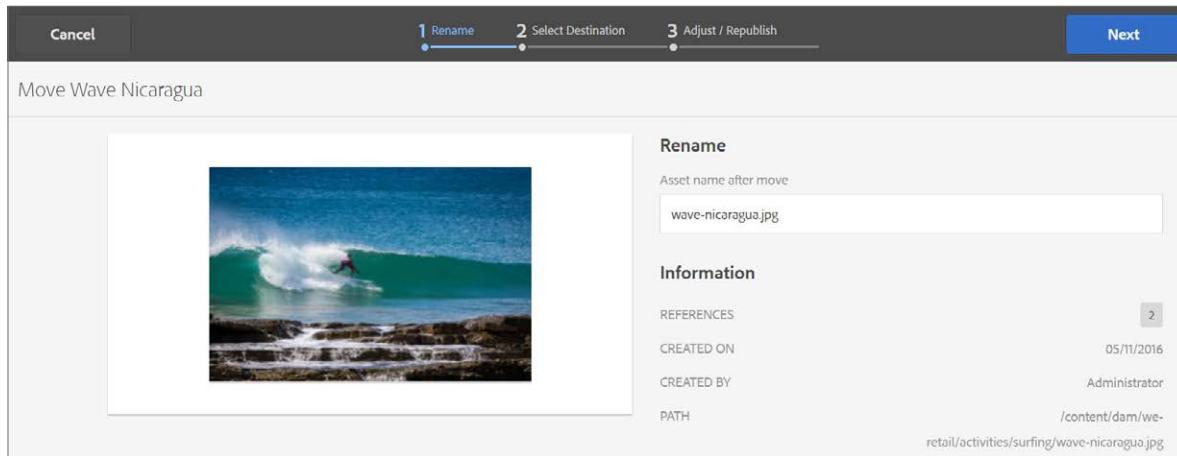
- Displays rating scores for assets to indicate their popularity.

## Additional Actions on Assets

You can perform the following actions on assets:

- Copy—Select an asset from the source folder; copy it and paste it into the destination folder.
- Delete: You can delete an unwanted asset from the folder.

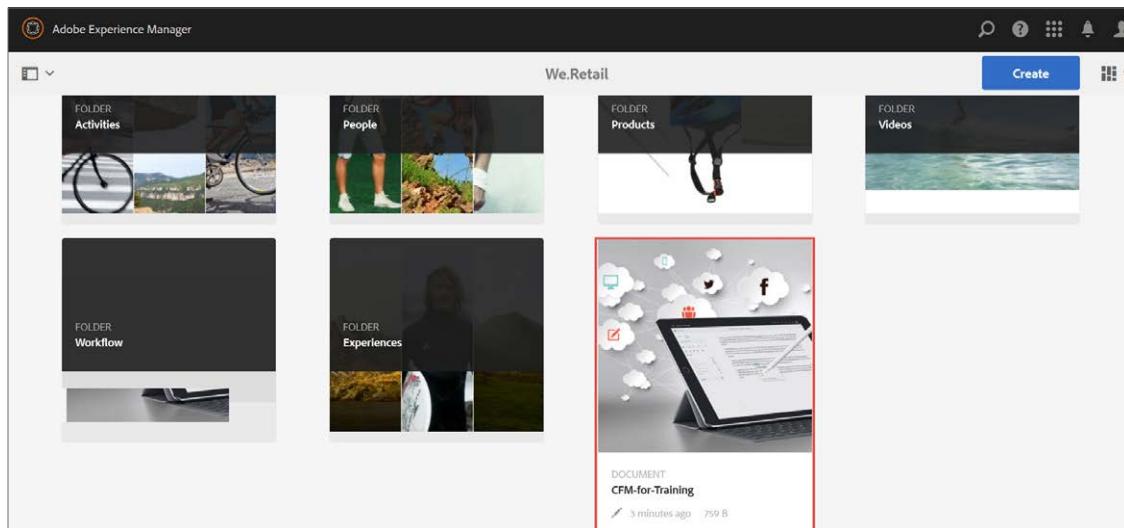
- Move and Rename: You can rename and move assets from one folder to another without creating a copy of the asset in the source folder.



 Perform **Task 4: Create a folder, upload assets, and perform additional actions on assets**, from the Lab Activity section.

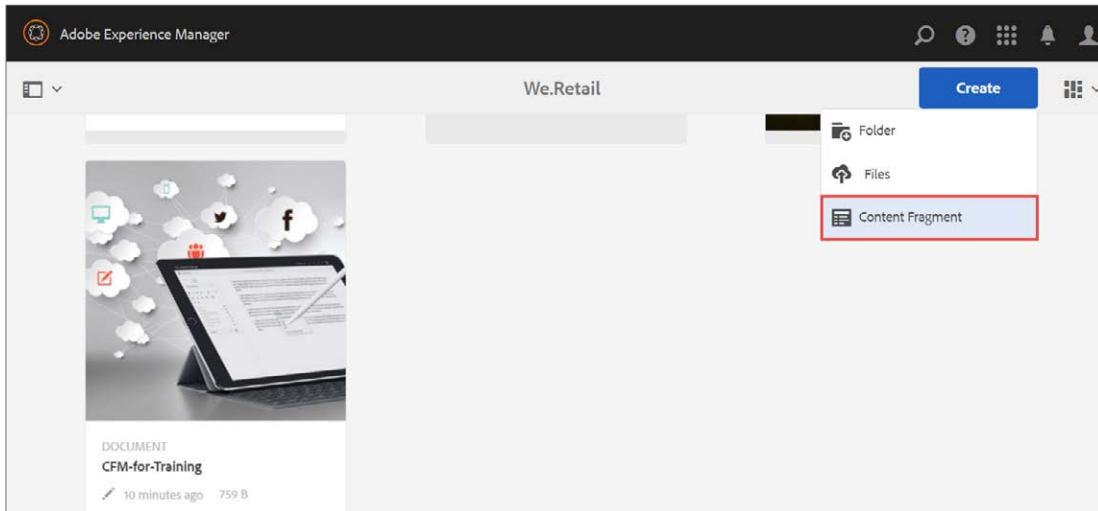
## Content Fragments

Adobe Experience Manager content fragments allow you to design, create, curate and use page-independent content. They allow you to create channel-neutral content, together with (possibly channel-specific) variations. You can then use these fragments, and their variations, when authoring your content pages.

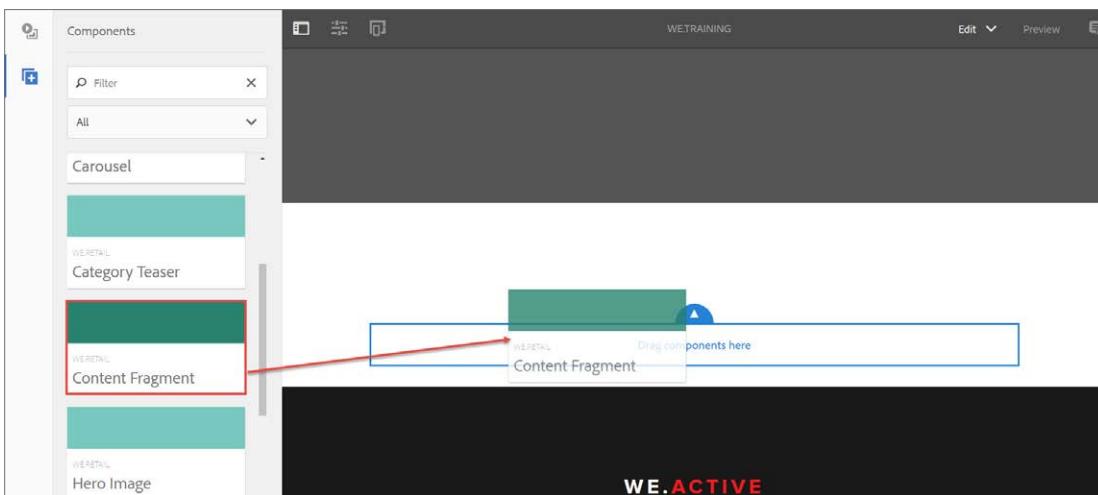


Content fragments are:

- Stored as Assets:
  - Content fragments (and their variations) can be created and maintained from the **Assets** console.



- Used in the page editor by means of the **Content Fragment** component (referencing component):
  - The Content Fragment component is available to page authors. It allows them to reference the required content fragment.



## Content Types

Content Fragments are a content type that:

- Contains one or more:
  - › Text elements
  - › References to associated assets (for example, images, videos, other fragments)
- Are independent from the delivery mechanism (for example, page, channel).
- Are defined by a Fragment Template.

The screenshot shows the Adobe Experience Manager interface. At the top, there's a navigation bar with the Adobe Experience Manager logo, a search icon, a help icon, a grid icon, a bell icon, and a user profile icon. Below the navigation bar, the title 'Arctic Surfing In Lofoten - Main' is displayed. On the left side, there's a sidebar with tabs for 'TOOLS' and 'VARIATIONS'. Under 'TOOLS', a dropdown menu is open, showing options: 'Rich Text' (selected), 'Plain Text', and 'Markdown'. Below this, there's a table with the following data:

Words	992
Characters	4689
Characters (with spaces)	5682
Sentences	42
Avg. Sentence (words)	24
Avg. Sentence (chars)	112
Paragraphs	8

The main content area contains the following text:

## Aloha spirits in Northern Norway

*Text: Jacob Wester. Photos: Sofia Sjöberg*

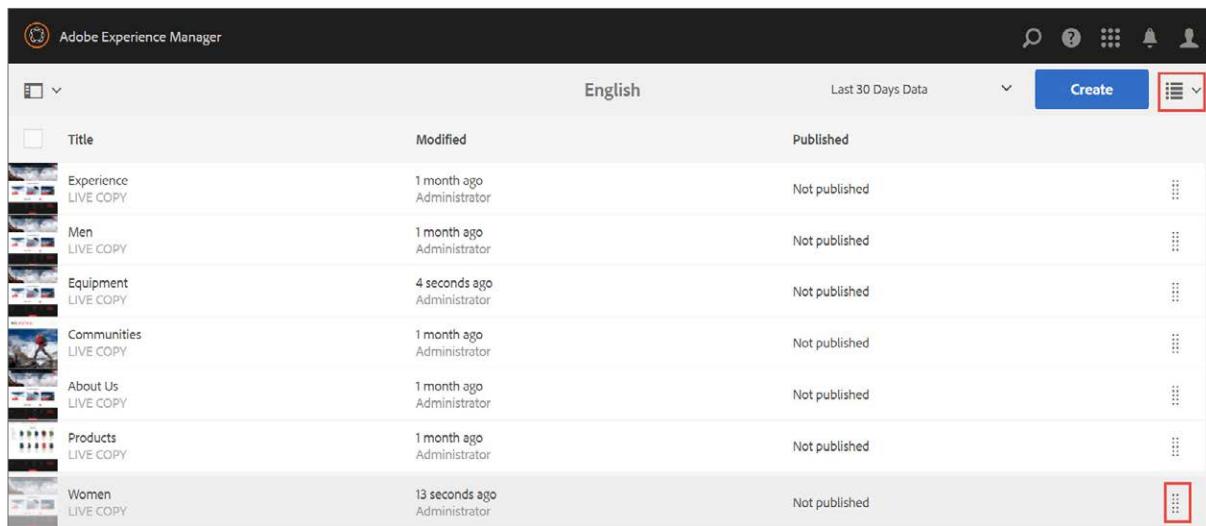
Steep mountain sides surround us, like wise trolls from a distant timeline, weathered and worn by long-gone glaciers, green moss now covering the black rock. White sheep forage on steep grass, defying the chilling winds funneled by the deep valley. The subtle hues of the arctic circle are welcoming, comfortable on the eyes. When rare sunrays pierce through the low clouds, the scenery reveals its vibrancy, as the waves reflect a translucent cyan blue before crashing loudly onto white sand. A small but playful groundswell is building, the offshore breeze grooming playful lines down the point, making for welcoming conditions for acclimatizing to cold water and thick neoprene. Knowing it is our last surf before a few days of hard wind, we take full advantage out of every ripple the North Atlantic Ocean sends our way. Tomorrow this place will have taken on a very different, much more hostile appearance.

# Reorganizing Site Structure

Pages are part of an overall site structure that must be taken care of. Let's look at the different options through which we can reorganize the pages within site structure.

## Reordering Pages

You can rearrange the pages within the site by dragging and dropping the page to the desired location using the right handlers in **List View**.



The screenshot shows the Adobe Experience Manager List View interface. At the top, there is a navigation bar with the AEM logo, the text "Adobe Experience Manager", and various icons for search, help, and user profile. Below the navigation bar is a toolbar with a "Create" button and a "List View" icon. The main area is a table with the following columns: Title, Modified, and Published. The rows represent different pages:

Title	Modified	Published
Experience LIVE COPY	1 month ago Administrator	Not published
Men LIVE COPY	1 month ago Administrator	Not published
Equipment LIVE COPY	4 seconds ago Administrator	Not published
Communities LIVE COPY	1 month ago Administrator	Not published
About Us LIVE COPY	1 month ago Administrator	Not published
Products LIVE COPY	1 month ago Administrator	Not published
Women LIVE COPY	13 seconds ago Administrator	Not published

## Copying Pages

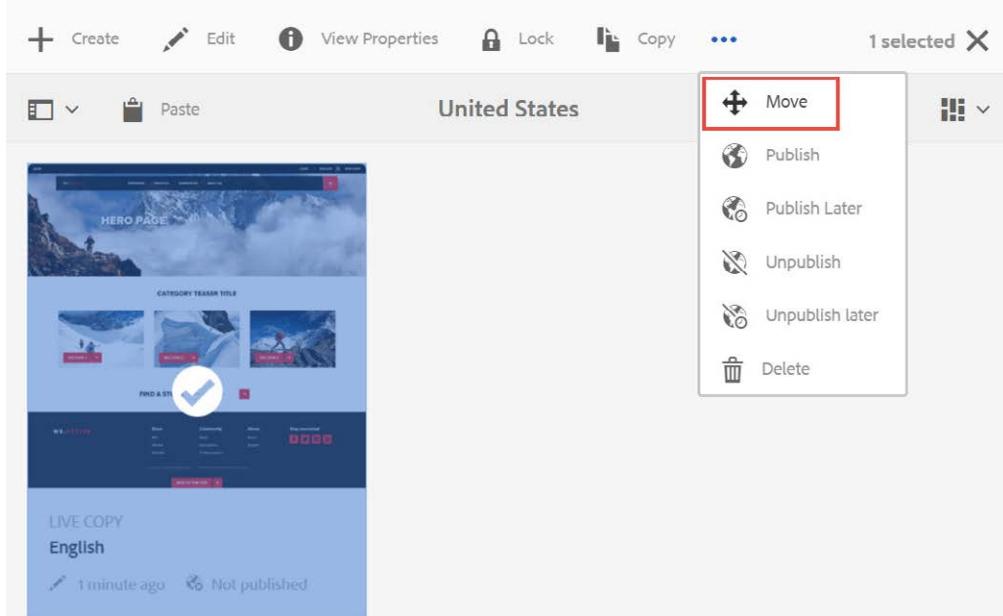
You can copy a page from the source and paste it anywhere within the parent's hierarchy but not in the root folder.

The screenshot shows the 'Language Masters' view in Adobe Experience Manager. At the top, there is a toolbar with buttons for 'Create', 'Edit', 'View Properties', 'Lock', 'Copy' (which is highlighted with a red box), and '...' (ellipsis). To the right of the toolbar, it says '1 selected X'. Below the toolbar, there are two preview cards. The left card is for a page titled 'New' and the right card is for a page titled 'English'. Both cards show a preview of a website with a hero image of a person on a mountain and some text. The 'New' card has a checkmark icon and the text '22 minutes ago' and 'Not published'. The 'English' card has the text '16 hours ago' and '7 months ago'.

The screenshot shows the 'Sites' view in Adobe Experience Manager. At the top, there is a toolbar with a 'Paste' button (highlighted with a red box), a search icon, a help icon, a grid icon, a bell icon, and a user icon. To the right of the toolbar, there is a 'Create' button. Below the toolbar, there are two preview cards. The left card is for a page titled 'We.Retail' and the right card is for a page titled 'United States'. The 'We.Retail' card shows a preview of a website with a hero image of a person on a mountain and some text. The 'United States' card shows a preview of a website with a hero image of a person on a mountain and some text. Below the preview cards, there is a section labeled 'LIVE COPY' with the text 'English', '1 minute ago', and 'Not published'.

## Move and Rename Pages

You can move and rename a page using a same wizard. With this, you can move and rename at the same time. Adobe Experience Manager offers you the functionality to update any internal links that refer to the page being renamed/moved.



Move Page

Move English

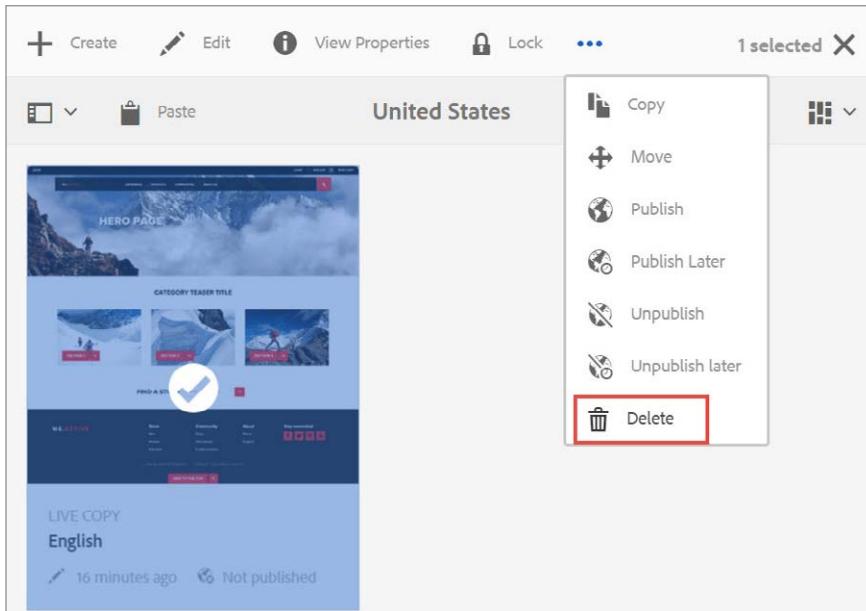
	<b>Rename</b> <input type="text" value="English"/> <b>Select Destination</b> <input type="text" value="en"/>  <b>Information</b> <small>REFERENCING PAGES</small> <small>CREATED ON</small> <small>CREATED BY</small> <small>PATH</small>
--	--

**Cancel** **Next**

**NOTE:** If you move the page to a location where a page with the same name already exists, the system will automatically generate a variation of the name.

## Deleting Pages

You can delete a page, if you no longer need it in the site.



Perform Task 5: Reorder pages within the site structure and perform various operations on a page, from the Lab Activity section.

# Adding Content Value through Page Options

Using Adobe Experience Manager, you can preserve the existing content by creating a version of a page.

## Versioning

Versioning captures the state of a page at a specific point in time.

Adobe Experience Manager allows you to:

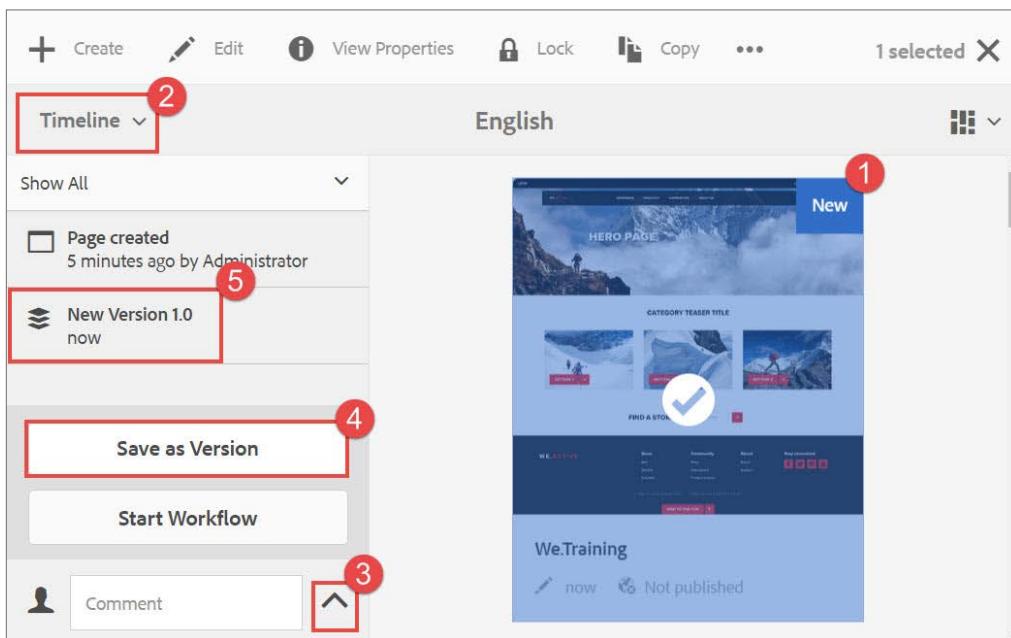
- create a version of a page.
- restore a page to a previous version.

The screenshot shows the AEM interface with the following elements:

- Top Bar:** Includes buttons for Create, Edit, View Properties, Lock, Copy, and a selection counter "1 selected X".
- Language:** English
- Timeline:** A dropdown menu is open, showing "Timeline ▾".
- Timeline List:** Shows a recent activity: "Page created 5 minutes ago by Administrator".
- New Version 1.0:** A new item in the timeline is highlighted with a red border, showing "New Version 1.0 now".
- Save Options:** Buttons for "Save as Version" and "Start Workflow".
- Comment:** A "Comment" button with a person icon.
- Preview:** A preview of the page content, which includes a hero image, category teasers, and a footer section for "We.Training".
- Status:** The page is marked as "Not published".

To create a page version:

1. Select the page using the **Select** icon from quick actions.
2. Select the **Timeline** button from the left rail.
3. Click the arrow icon beside **Comment** box.
4. Click **Save as Version**.
5. Click **Create**. New Version 1.0 of the page will be created.



Perform **Task 6: Create a page version**, from the Lab Activity section.

## Increasing the Content Value

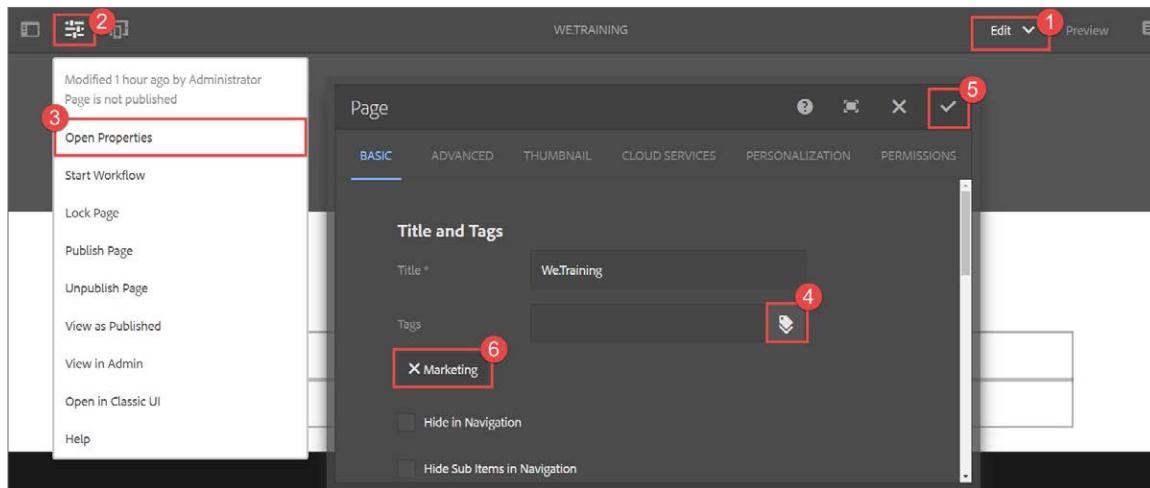
"Content is more valuable when available at the right moment to the right person in the right format." Adobe Experience Manager uses tags and search options to display the right content at the right moment.

### Tagging a Page

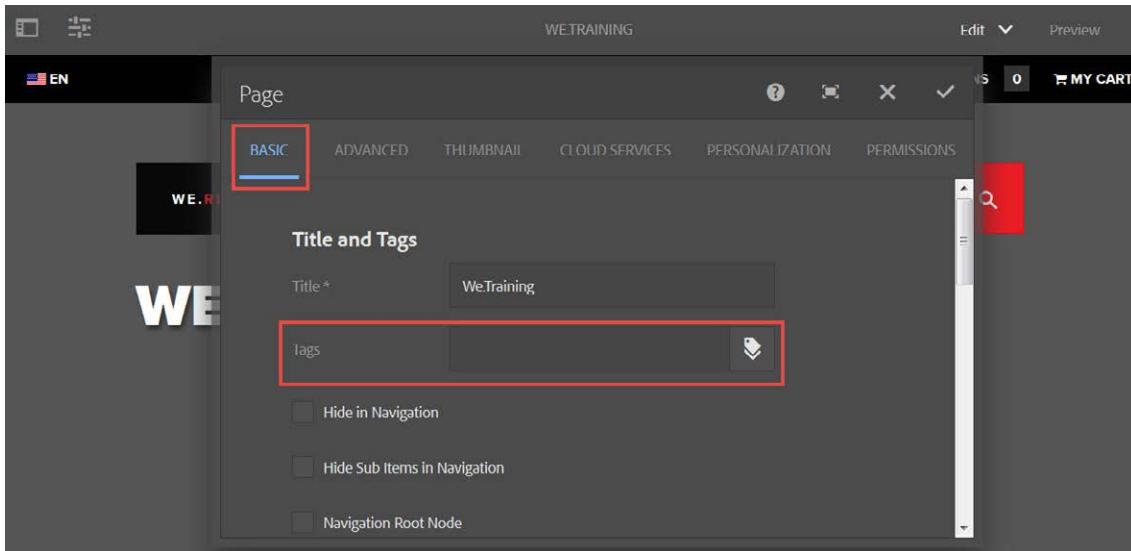
A tag is a piece of metadata assigned to a page or an asset. Tags are a quick and easy method of classifying content within your website.

To add tags to a page:

1. Open the page in **Edit** mode.
2. Click **Page Information** icon from the toolbar.
3. Select **Open Properties** from the drop-down. The **Page** dialog box appears. Ensure you are in the **BASIC** tab.



4. Click **Browse** icon beside the **Tags** field. Select tags that you want associated with this page, and then click **Confirm**.
5. Click **Done** from the **Page** dialog box.
6. All the selected tags will get added to the page.



## Search for a Page Using Tags and Save the Filter

Adobe Experience Manager gives a powerful search functionality with various options such as search through keywords, path, tags, modified date, and publish status. You can save this search to use it in the future, which helps in fast retrieval.



**Perform Task 7: Add tags to a page, search based on a tag and save searches,** from the Lab Activity section.

# Working in Teams

Adobe Experience Manager has several features, which helps a team to collaborate:

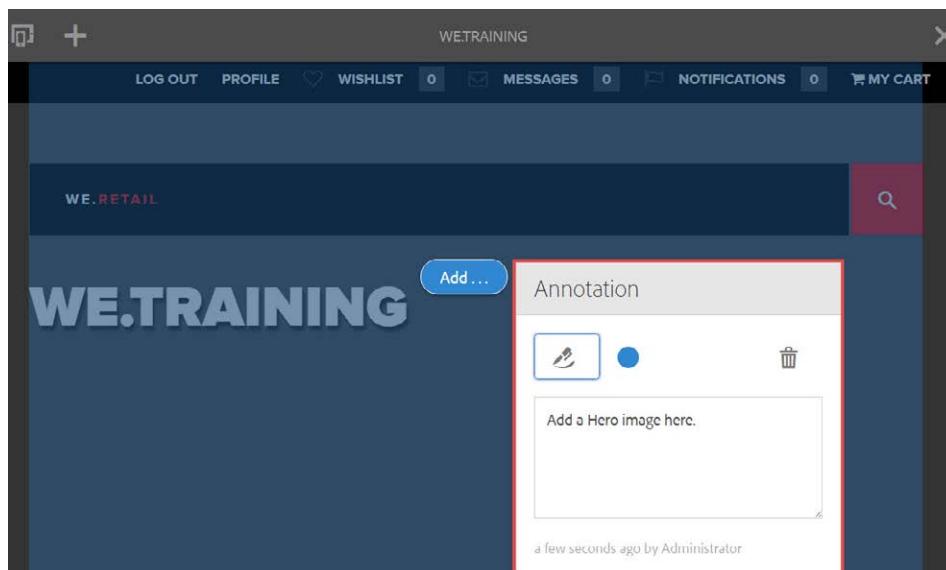
- Adding annotations
- Locking a page
- Creating workflows

## Adding Annotations to a Page

Once authors add content to a page, it can be subject to discussions with other team members, prior to publishing the content, using the Annotations feature. Annotation solves the problem of page specific information flow, allows leaving messages to other authors within the context of the page.

An annotation in Adobe Experience Manager places a colored marker or sticky-note on a component of the page. The annotation feature allows you to add comments or questions for other authors and reviewers. In addition to text, you can add simple line graphics that you can position to highlight an area of the page.

You can add annotations to a page using the **Annotate** mode available from the page toolbar.



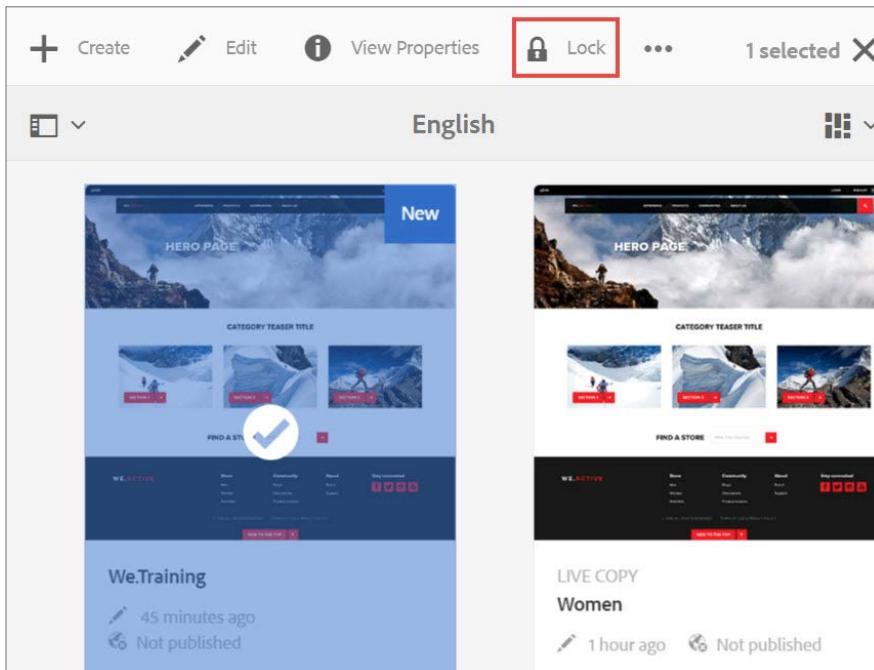
Perform **Task 8: Add annotations to a page**, from the Lab Activity section.

## Locking and Unlocking a Page

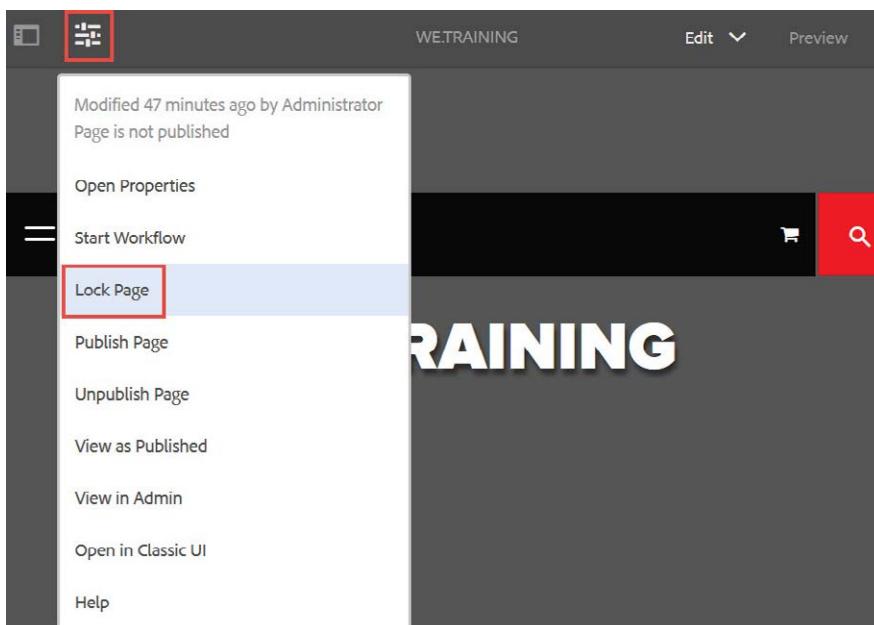
Adobe Experience Manager allows you to lock a page, which restricts other users from modifying the content. You can lock a page when you want to make multiple edits to one specific page, or when you need to freeze the page content.

You can lock a page from either:

- Selection mode—Select a page you want to lock, and then click **Lock** from the actions bar.



- Page Information—Open a page, click **Page Information** icon, and select **Lock Page** from the drop-down.

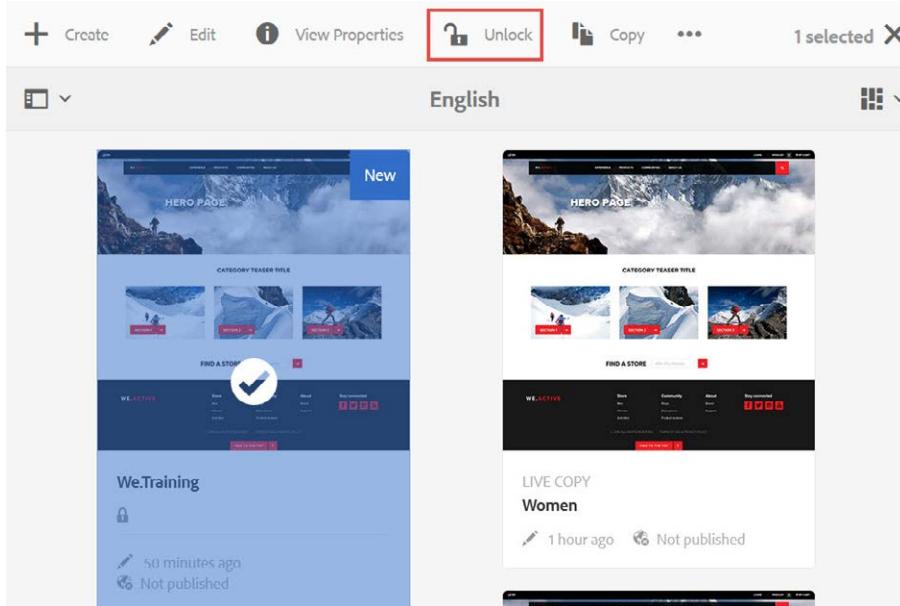


The only person who can unlock the page is:

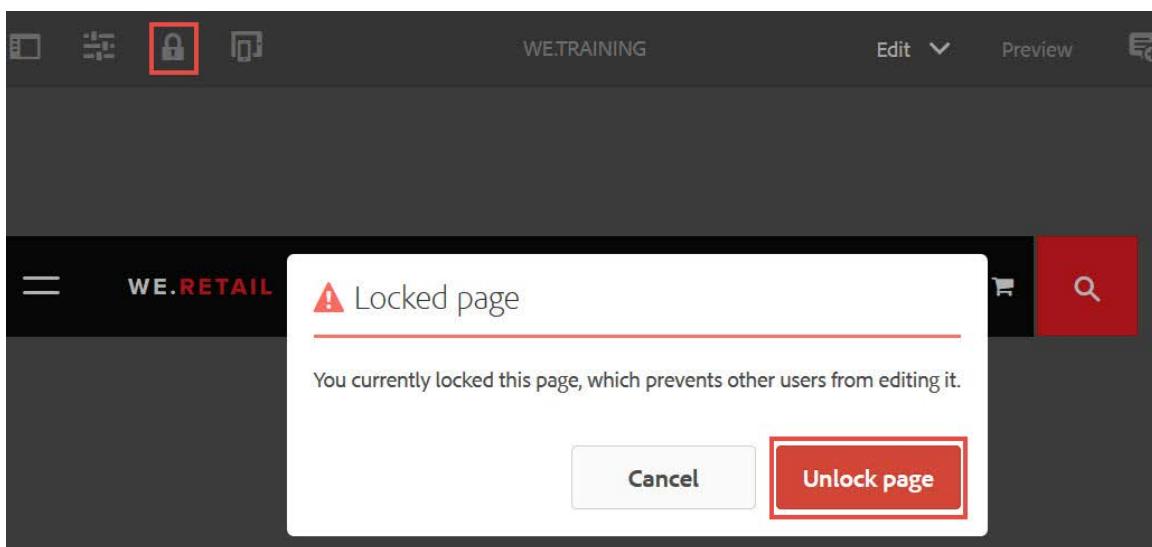
- The user who locked it.
- A user with administrator access.
- Any user who was granted impersonation rights.

You can unlock it from:

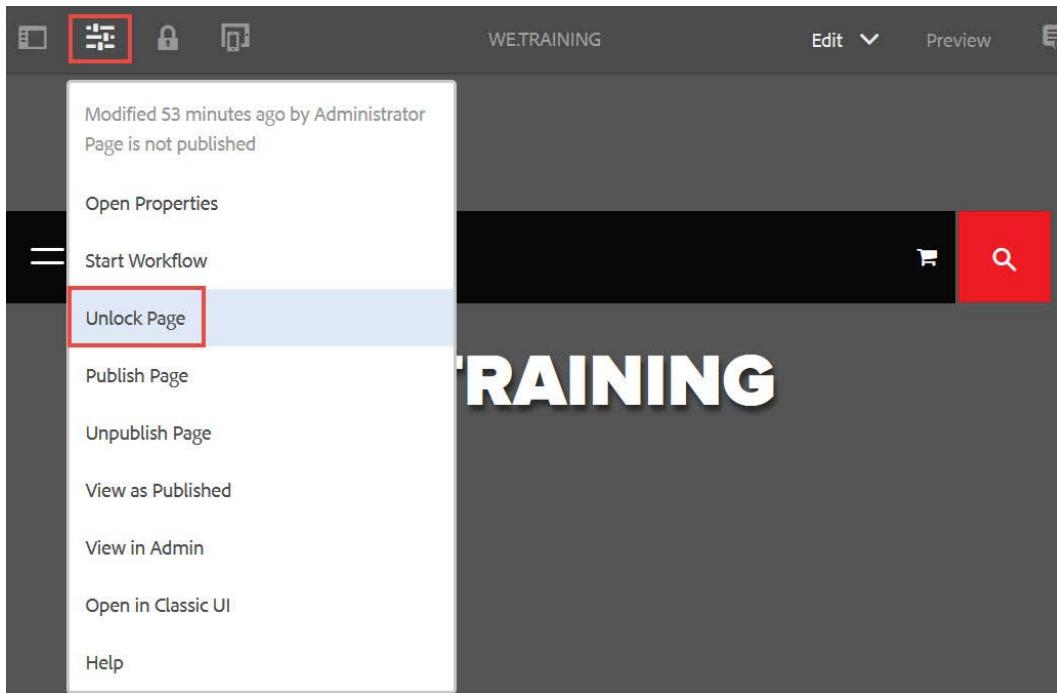
- Selection mode—Select a page that is locked and click **Unlock** from the actions bar.



- Page toolbar—Click **Locked page** icon from the toolbar, and then click **Unlock page** from the **Locked page** dialog box.



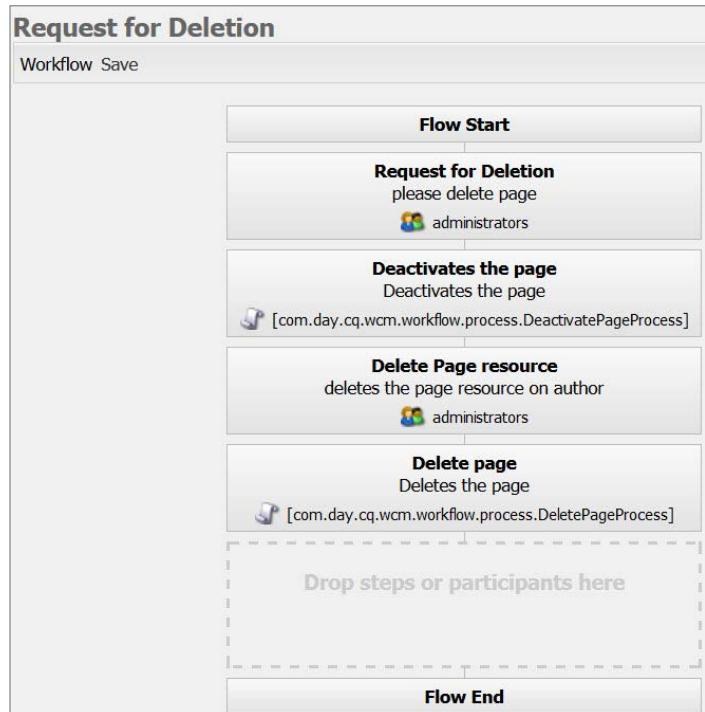
- Page Information—Click **Unlock page** icon from the **Page Information** drop-down.



Perform **Task 9: Lock and unlock a page**, from the Lab Activity section.

## Implementing Business Processes

Workflows allow you to automate processes for managing resources and publishing content in your Adobe Experience Manager environment. Workflows are comprised of a series of steps, and each step performs a specific task.



For example, business processes for creating and publishing web pages include approval and sign-off tasks by various participants. You can model these processes using workflows and applying them to specific content.

Adobe Experience Manager has several workflow models out-of-the-box, but it also allows you to create a custom workflow model for your processes.

 Perform **Task 10: Use a workflow to automate the page publishing process**, from the Lab Activity section.

# Publishing and Unpublishing Pages

Adobe Experience Manager allows you to publish one or more pages to the Publish environment, and also unpublish them.

You have options to publish and unpublish pages:

- Immediately—using **Publish** and **Unpublish** options.
- Schedule it for later—using **Publish later** and **Unpublish later** options.

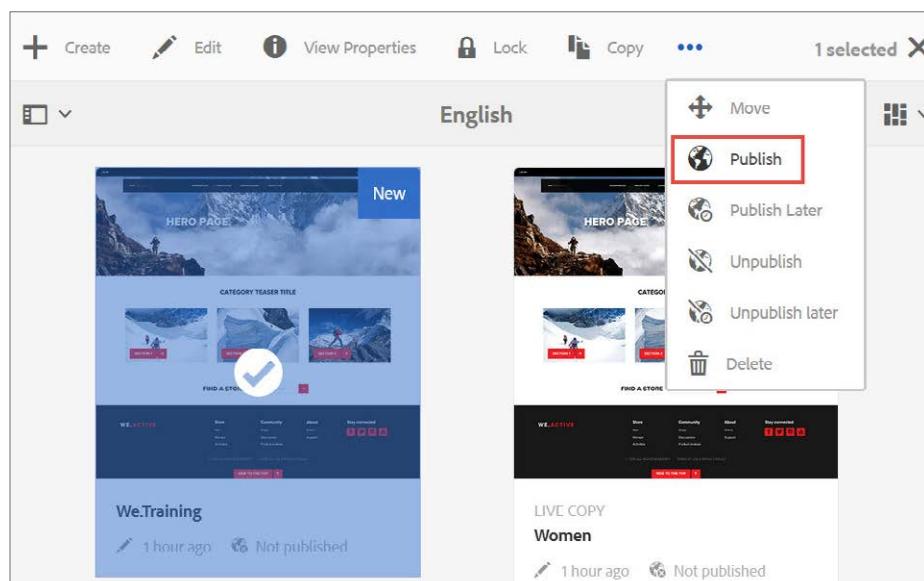
## Publishing a Page

Publishing (or activating) a page will activate the page to your publish environment so it is available to visitors.

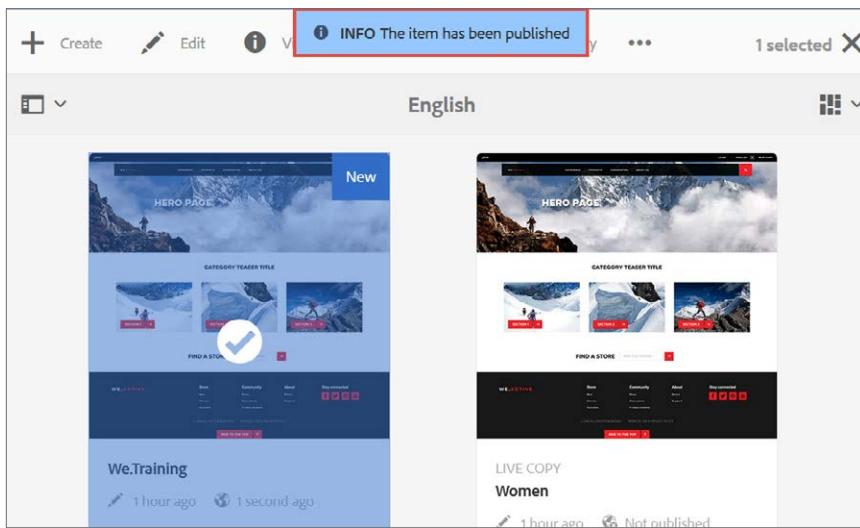
If you choose **Publish later**, it starts a workflow to publish a version of the page at the specified time.

Steps to publish a page:

1. Select the page you want to publish; you can either select **Publish** or **Publish later** from the drop-down.
2. Select **Publish** to publish the page immediately.



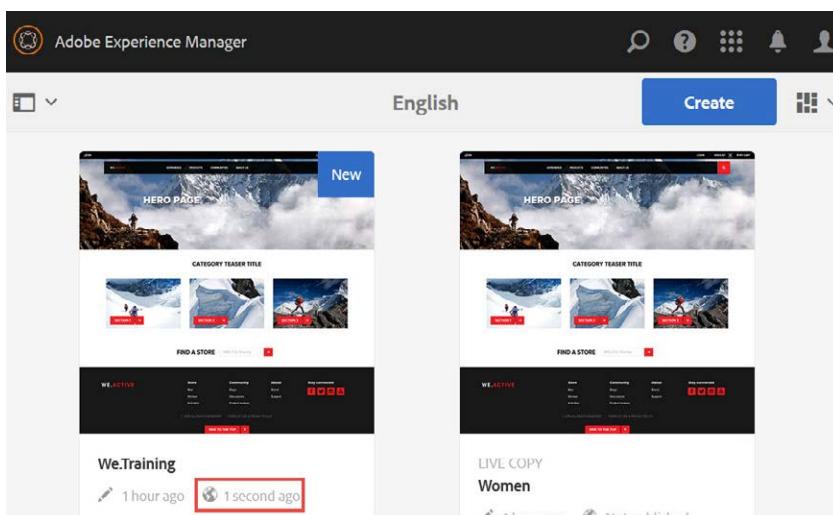
3. Depending on whether the page has references that need publishing:
  - a. The page will be published directly; if there are no references to be published.



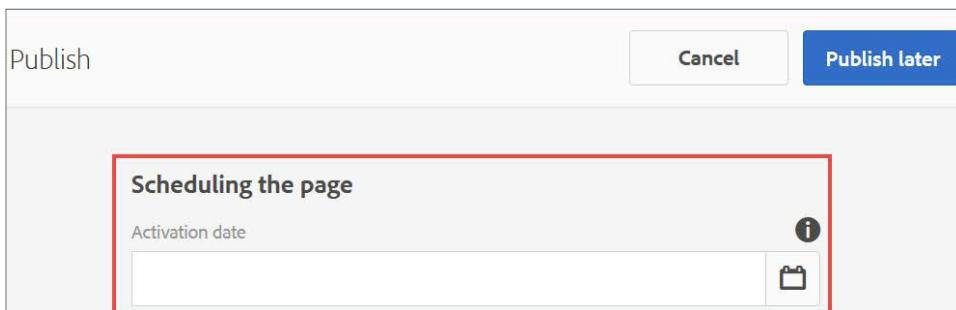
- b. If the page has references that need publishing, these will be listed in the **Publish** wizard, where you can:
  - i. Specify which of the assets you want to publish together with the page, and then click **Publish** to complete the process.



4. If you see the page in **Card View**, an icon called now appears. If you mouse-hover, it says **1 second ago**, which means it is being **Published**.

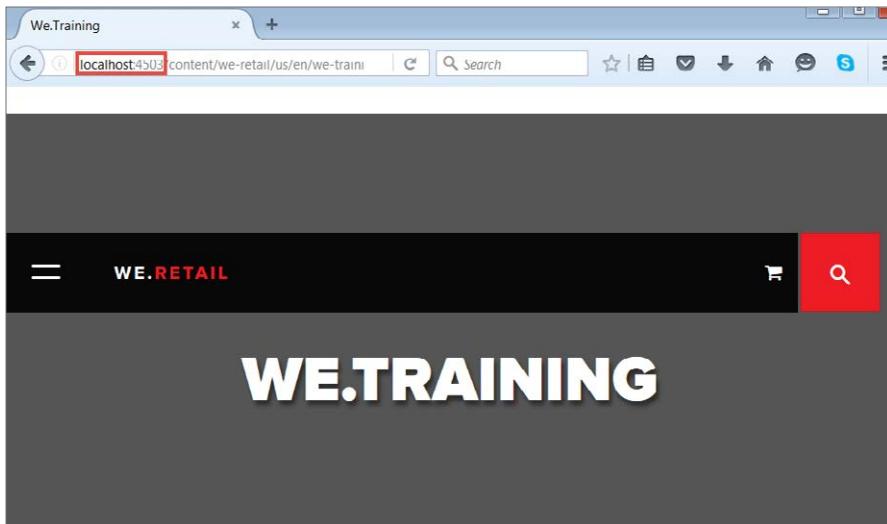


5. If you choose to publish a page later, you need to specify the date for activation. A workflow is started to publish the page at a specified time.



To view the published page, you need to have a Publish instance running on your machine.

1. Access the Publish instance.
2. Type the URL of the page in the address bar, which was published. In this case, **http://localhost:4503/content/we-retail/us/en/we-training.html**



## Unpublishing a Page

Unpublishing (or deactivating) a page removes it from your publish environment so it is no longer available to the visitors.

Similar to publish option, you can unpublish immediately or later. Deactivating later starts a workflow to unpublish a version of the page at a specific time.

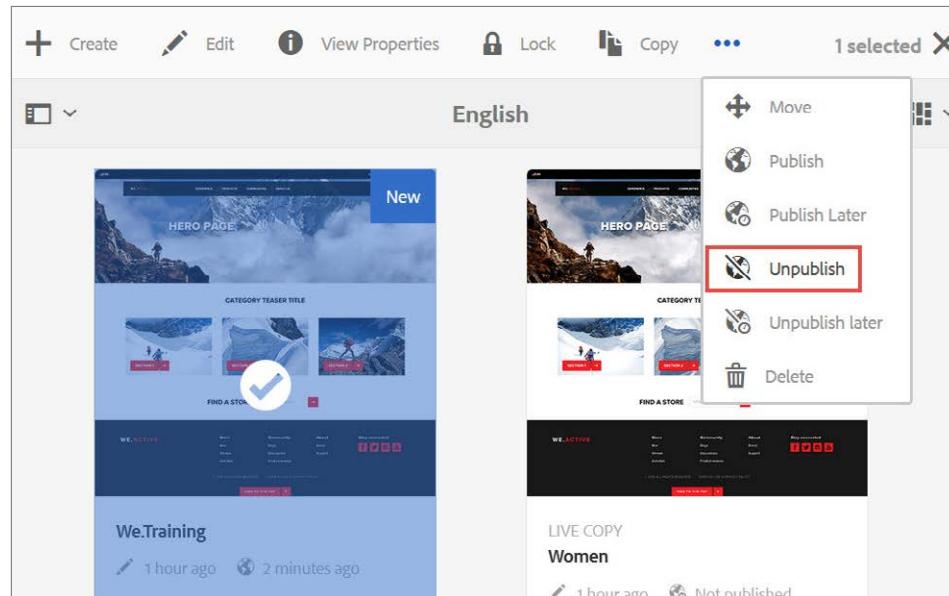
---

 **NOTE:** Similar to pages, you can publish and unpublish assets.

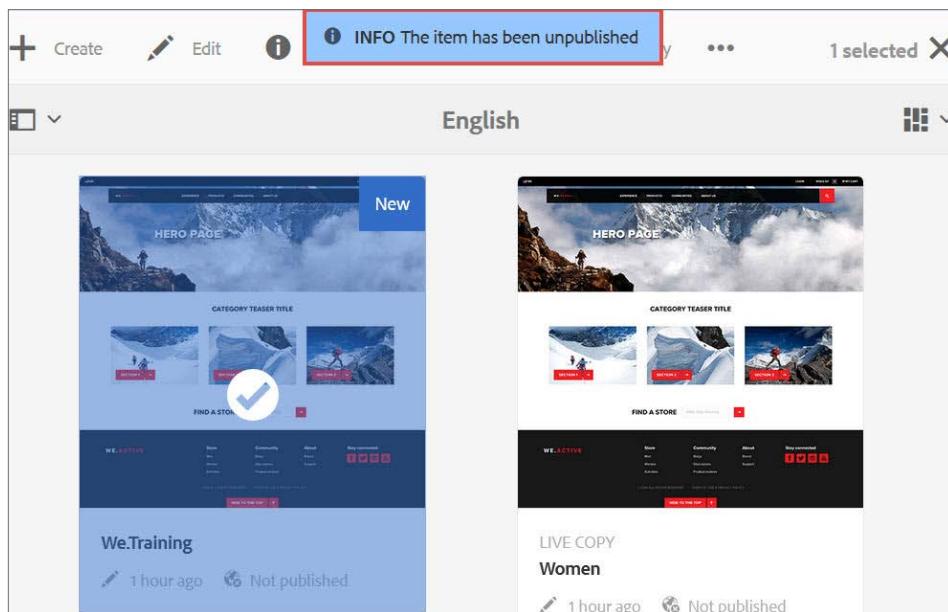
---

Steps to unpublish a page:

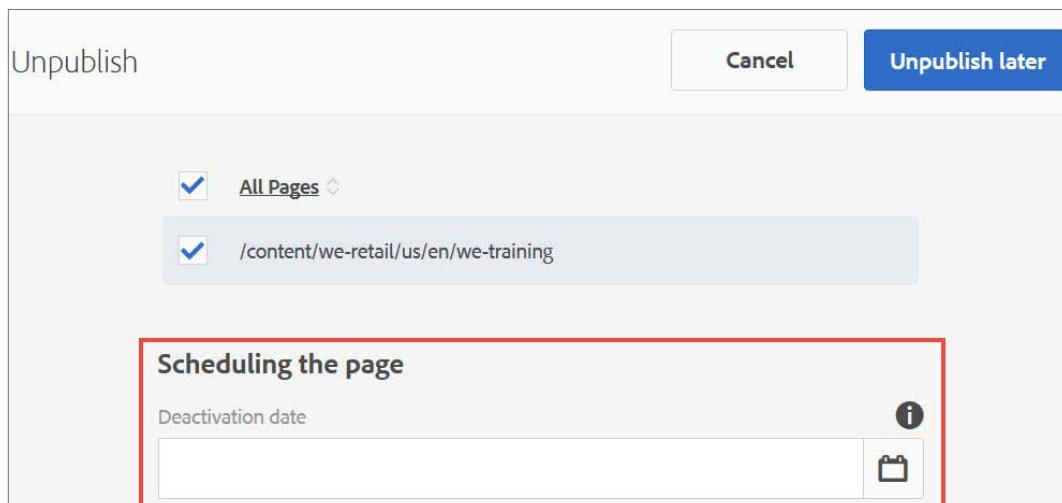
1. From the **Sites** console, use the selection mode to select the required page(s).
2. Select the **Unpublish** option from the actions bar.



The page is unpublished immediately.



3. If you select **Unpublish later**, it will ask you to specify a date for deactivation. A workflow is started.



If you want to cancel the publish/unpublish later selection, go to the **Workflow** console from **Tools** to terminate the corresponding workflow.

# Lab Activity

---

## Scenario

XYZ is an online shopping portal. Off late, their online traffic has increased, which in turn has led to an increase in the volume of both global and local content. After looking for a Web Content Management (WCM) system, they have decided to go ahead with Adobe Experience Manager. They want the WCM to:

- Have an intuitive and flexible site structure
- Support responsive and traditional web page design
- Help in maintaining and increasing the content value
- Coordinate and support team collaboration

## Challenge

- Creating a distinct visual and user experience in Adobe Experience Manager without being limited to select few web page designs.
- Creating responsive web pages, which works on all device screen sizes, without compromising on readability and content flow.
- Editing properties of multiple pages to add common values to all the selected pages.
- Creating folders and uploading various assets and content fragments, and using them in web pages.
- Reorganizing the pages within the site structure through various page options available in Adobe Experience Manager.
- Creating page versions to retain the existing content value.
- Adding tags to pages and saving search results to display the right content to the visitor.
- Adding annotations to subject the content of web pages to discussion with other team members prior to publishing the content.
- Locking pages to restrict other authors from editing the created content.
- Starting a workflow to automate different processes.

## Overview

To complete the challenge, you need to:

- Create and edit a page by including components
- Create and edit responsive pages
- Edit multiple page properties
- Create folders to organize assets, and use content fragments in pages
- Reorganize the site structure
- Create page versions to maintain the value of existing content
- Add tags and search functionality to pages to increase the content value
- Add annotations, locks, and workflows to coordinate and support team effort

## Pre-requisites

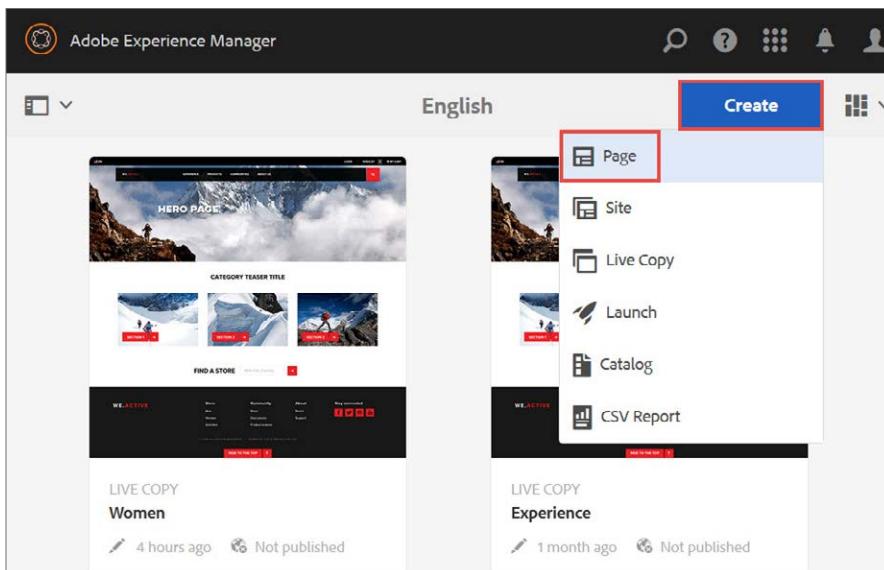
You should have performed the Adobe Experience Manager installation steps, and have running Author and Publish instances.

## Steps

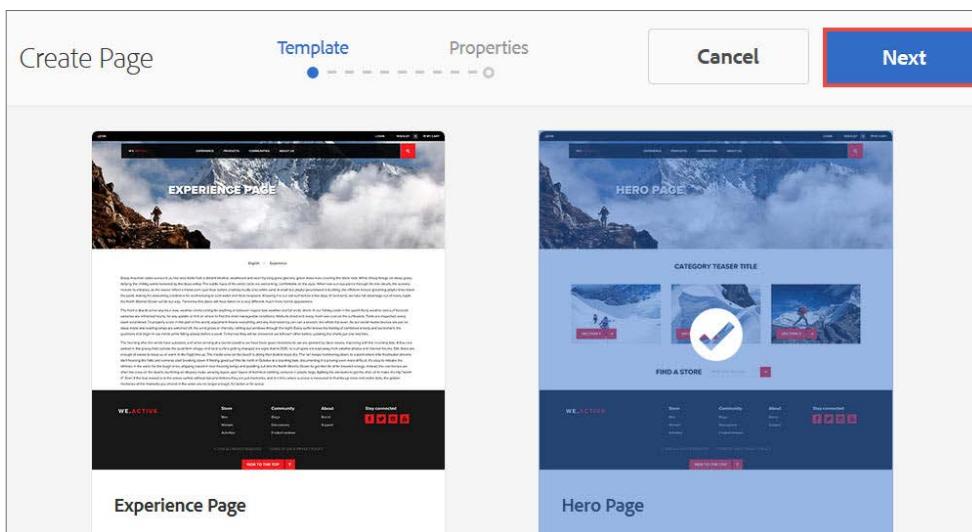
### Task 1: Create and edit a page

To create a page:

1. Log in to Adobe Experience Manager.
2. From the **Sites** console, navigate to the location where you want to create the new page (for example, **We.Retail > United States > English**).
3. Under **English** page click **Create > Page** from the actions bar.



4. In the **Template wizard**, select the **Hero Page** template, and then click **Next** to proceed.



5. In **Properties** wizard, provide values for the following fields:

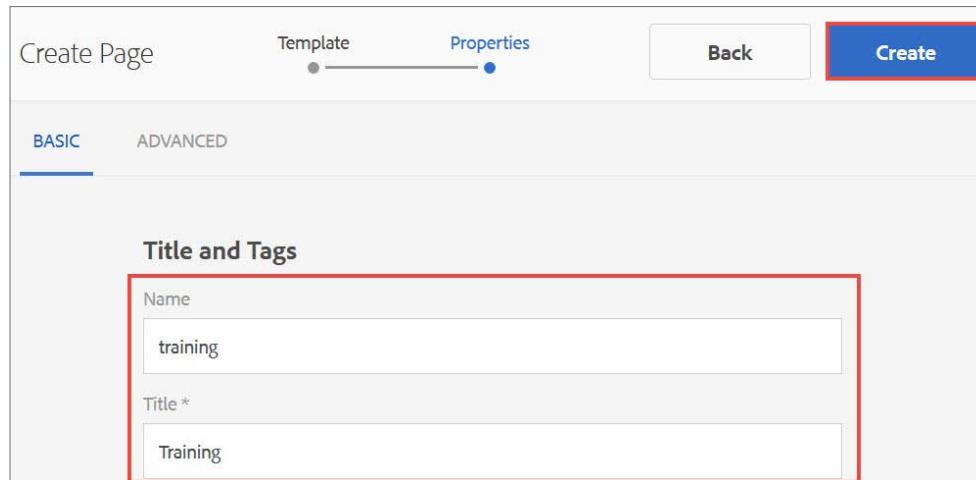
- a. **Name** – training\_<username>
- b. **Title** – Training\_<username>

---

 **NOTE:** It is important to create your page with a unique identifier so you can identify your page amongst those of your peers' pages being created in the same environment. It also important to use lowercase letters when creating the name of your page, as some web servers are case-sensitive.

---

6. Click **Create** to complete the process.



Create Page      Template      Properties

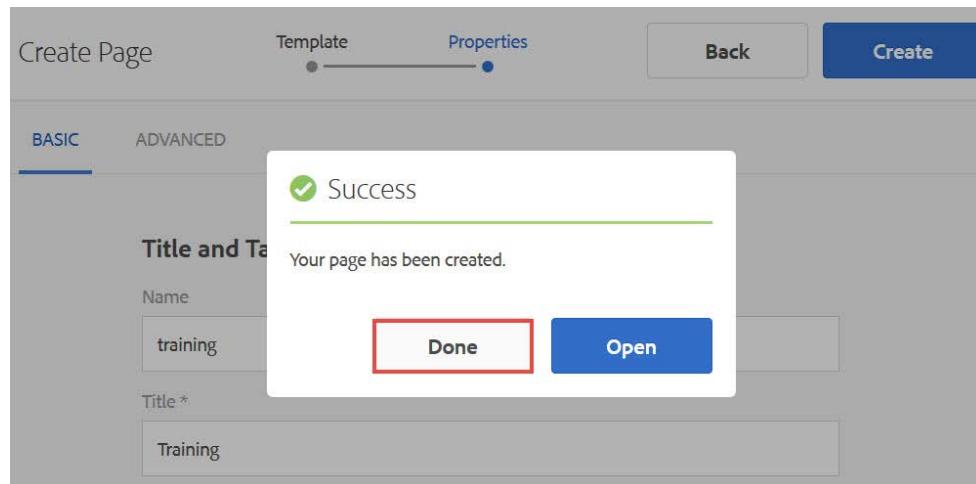
Back      Create

BASIC      ADVANCED

**Title and Tags**

Name	training
Title *	Training

7. Click **Done** from the **Success** dialog box.



Create Page      Template      Properties

Back      Create

BASIC      ADVANCED

**Title and Tags**

Success

Your page has been created.

Done      Open

Name  
training

Title \*  
Training

The new page will appear as a child of the **English** page under **We.Retail** site.

The screenshot shows the Adobe Experience Manager interface for the 'English' site. At the top, there's a navigation bar with icons for search, help, and user profile. Below it, a blue 'Create' button is visible. The main content area shows two pages side-by-side:

- New**: Labeled 'Training'. It has a red border around its preview image and title. Below the preview, it says '23 seconds ago' and 'Not published'.
- LIVE COPY**: Labeled 'Women'. It also has a red border around its preview image and title. Below the preview, it says '5 hours ago' and 'Not published'.

- Now, follow Steps 3-7 and create three subpages for example, **Alpha\_<username>**, **Beta\_<username>**, and **Gamma\_<username>** under **Training** page.

The screenshot shows the 'Training' page in the Adobe Experience Manager interface. The page title 'Training' is at the top. Below it, there are three subpages listed:

- Alpha**: Has a red border around its preview image and title. Below the preview, it says '1 minute ago' and 'Not published'.
- Beta**: Has a red border around its preview image and title. Below the preview, it says '32 seconds ago' and 'Not published'.
- Gamma**: Has a red border around its preview image and title. Below the preview, it says '1 second ago' and 'Not published'.

Let's edit the page and add text and images to page using **Text** and **Image** components.

To add text and image to the page:

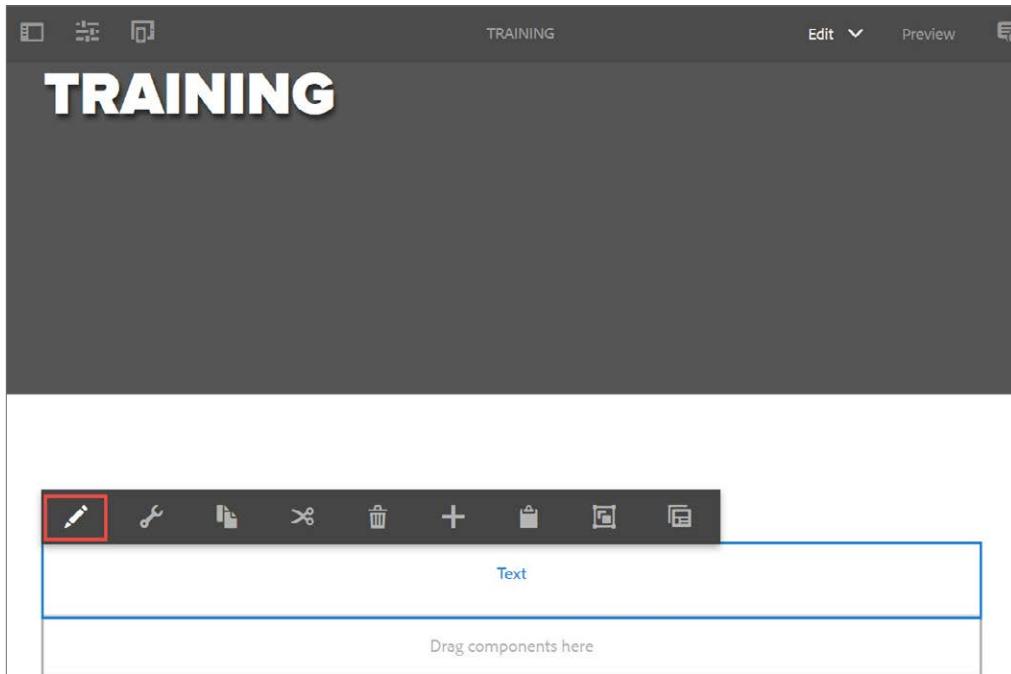
1. Select the page you just created using the selection mode and click **Edit** from the actions bar.

The screenshot shows the AEM authoring interface. At the top, there are buttons for 'Create', 'Edit' (which is highlighted with a red box), 'View Properties', 'Lock', and '1 selected X'. Below this, the language is set to 'English'. Two versions of a 'HERO PAGE' are displayed side-by-side: 'New' on the left and 'LIVE COPY' on the right. The 'New' version has a blue sidebar on the left containing the word 'Training', a creation date of '25 minutes ago', and a status of 'Not published'. The main content area shows a hero image of a person climbing a mountain, a category teaser title, and three smaller images below it. The 'LIVE COPY' version is identical. At the bottom, there is a 'FIND A STORE' section and a footer with social media links.

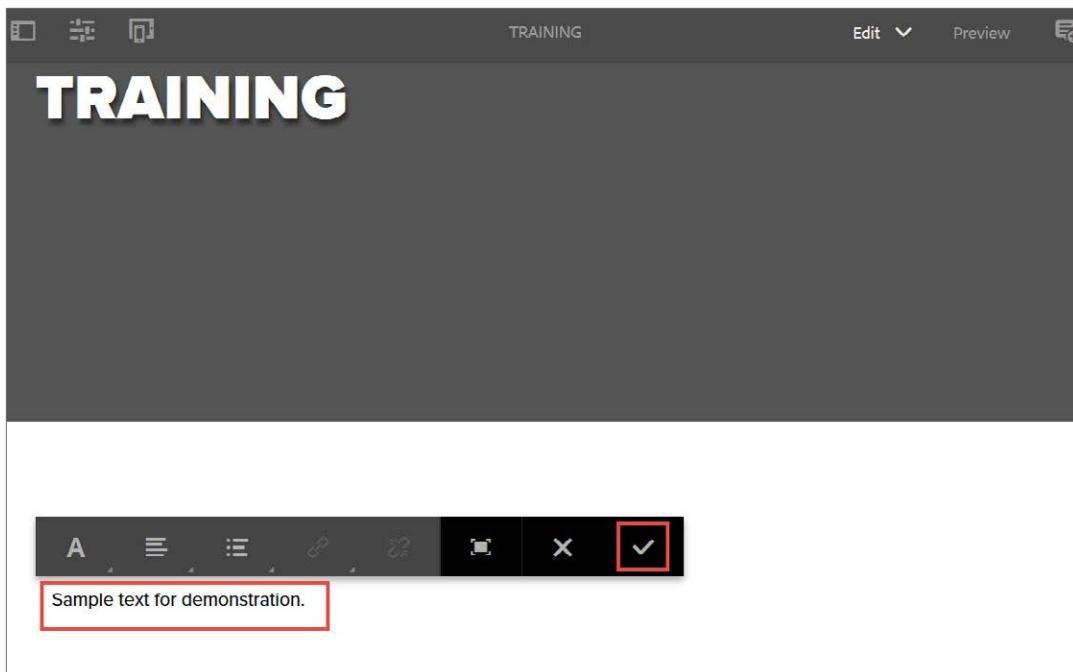
2. To add text to the page, first you need to add a **Text** component.
3. Click the **Side Panel** icon, search for **Text** component in the **Components** tab.
4. Drag and drop the **Text** component into the **Drag components here** area.

The screenshot shows the AEM authoring interface with the 'Components' tab selected in the Side Panel (indicated by a red box with number 3). A 'Text' component is selected and highlighted with a red box (indicated by a red box with number 4). A callout arrow points from the selected 'Text' component in the Side Panel to the 'Drag components here' area on the right, which is also highlighted with a red box. The main content area displays the word 'TRAINING' in large capital letters.

5. Select the **Text** component, and then click **Edit** (pencil icon) from the component toolbar.



6. Add sample text and click **Done** (checkmark) to save the changes. The text is added to the page.



As discussed earlier, you can add images to the page without adding Image component.

To add an image:

7. Choose any image from the **Assets** tab and drag and drop the image onto **Drag components here**. The image is added to the page.





## Task 2: Edit a responsive page, perform actions and preview the page in various emulators

Let's add Layout Container and other components to the responsive page, edit the responsive page layout, and view the page in different emulators.

To edit the responsive page layout:

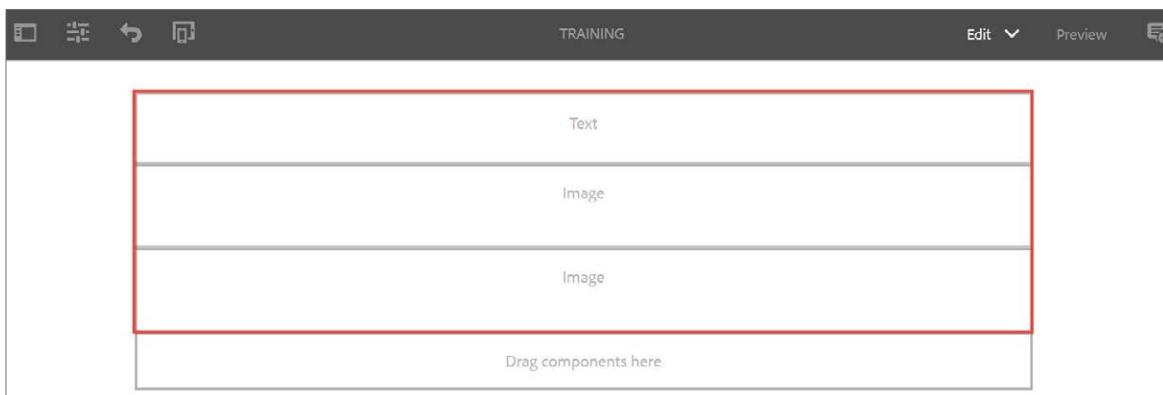
1. Open the **Training\_<username>** page in **Edit** mode.
2. Search for **Layout Container** component from the **Components** browser, and then drag and drop it onto the page.

The screenshot shows the AEM authoring interface in 'Edit' mode. On the left, the 'Components' browser is open, displaying a list of components. A red box highlights the 'Layout Container' component under the 'GENERAL' category. A red arrow points from this highlighted component in the browser to its instance on the page. The main content area displays the page 'TRAINING' with the text 'WE.ACTIVE' and navigation links for 'Women', 'Experience', and 'Men'. The top right of the screen shows 'Edit' and 'Preview' buttons.

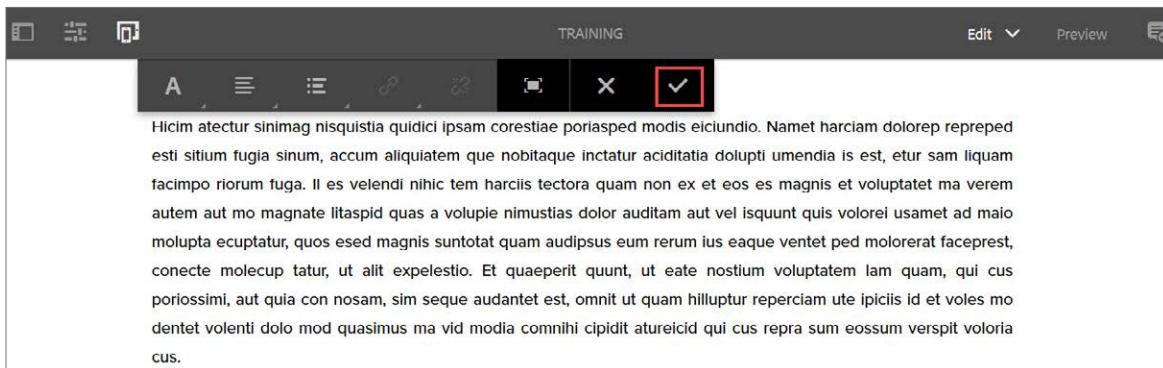
3. Add a **Text** component onto the **Layout Container** from **Insert New Component** dialog box.

The screenshot shows the 'Insert New Component' dialog box. The 'Text' component is highlighted with a red box. Other components listed include Carousel, Category Teaser, Content Fragment, Hero Image, Image, Product Grid, and Layout Container. In the background, a preview of the page shows the 'WE.ACTIVE' text and social media icons (Facebook, Twitter, Instagram) at the bottom.

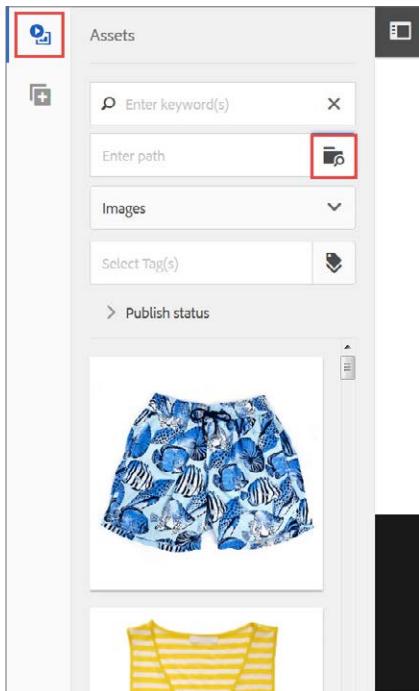
4. Similarly add two **Image** components below **Text** component and onto the **Layout Container**.



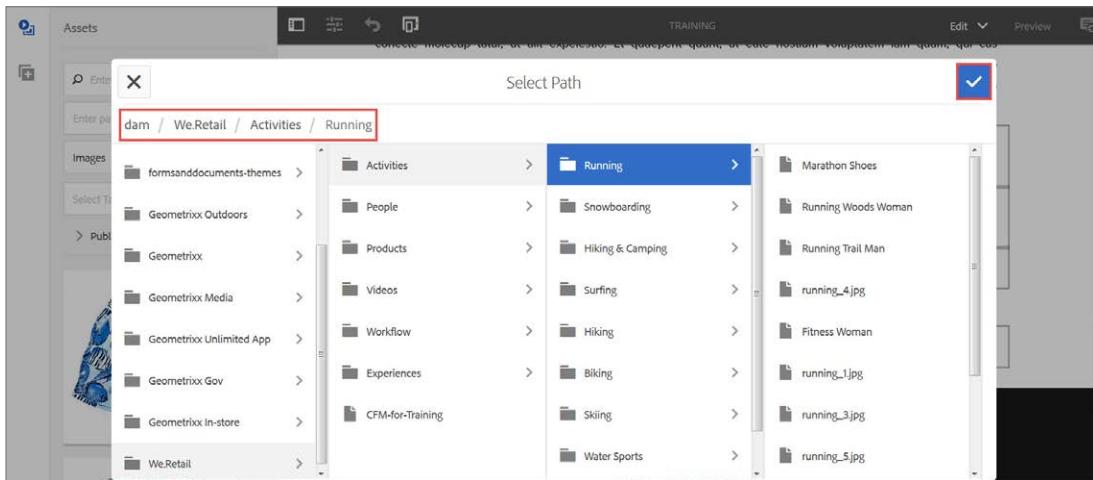
5. Click the **Text** component, and then click the **Edit** icon from the component toolbar.  
 6. Add several paragraphs of text into the **Text** component.



7. Click the **Assets** tab and click the **Browse** icon in the **Enter path** field.

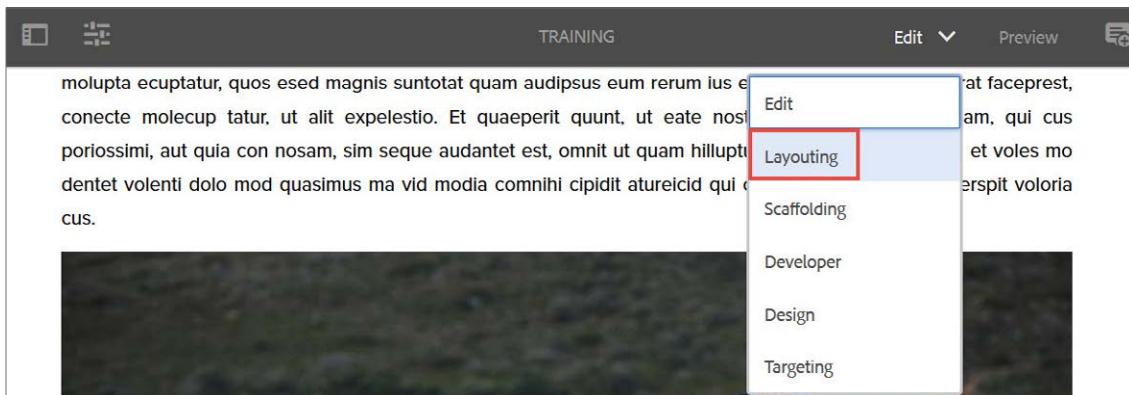


8. Select the path **dam / We.Retail / Activities / Running**, and then click **Confirm**. Images from this path appear in **Assets** browser.



9. Drag and drop two desired images from the **Assets** onto each of the **Image** components within **Layout Container**.

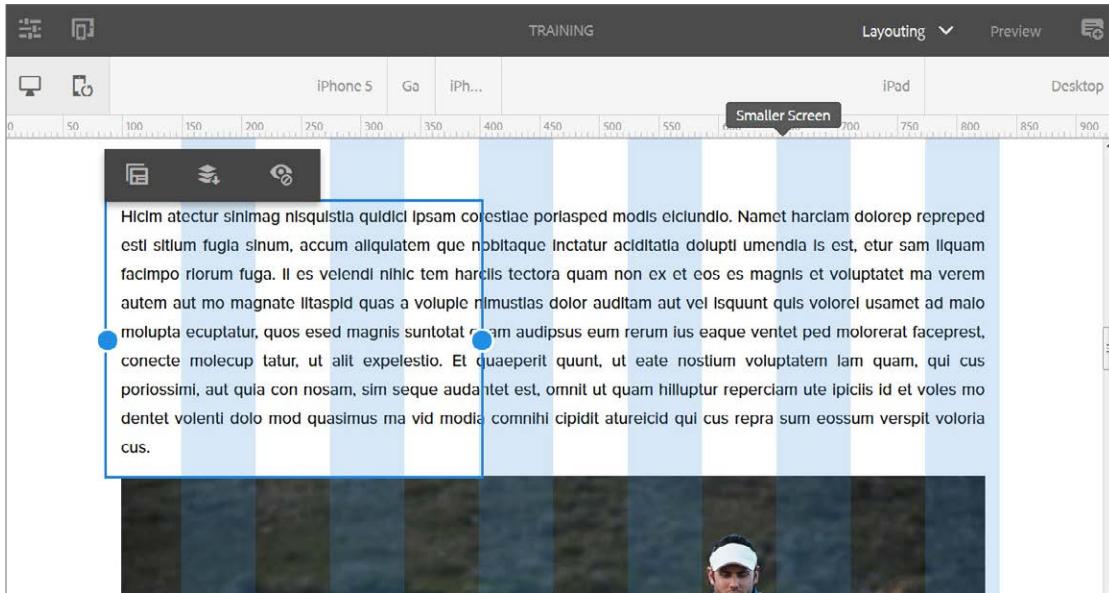
10. Select **Layouting** from the **Edit** drop-down menu.



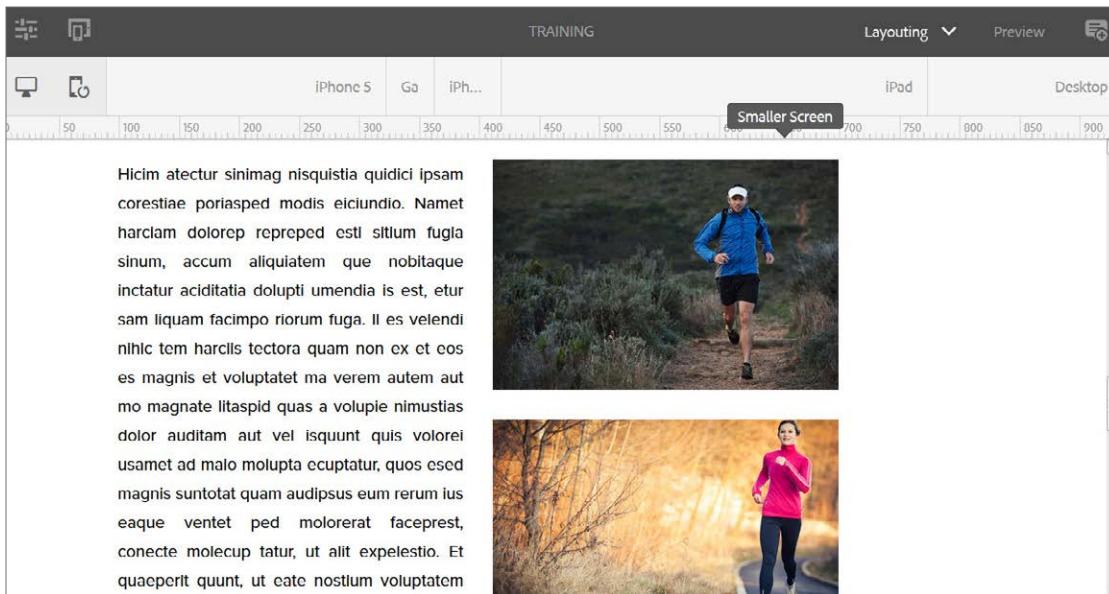
11. Select **Desktop** icon on the emulator toolbar.



12. Click the **Text** component to select it.
13. Use the blue dot to resize the component. Span the blue dots to occupy five columns. (Drag the blue handler towards the right of the component).



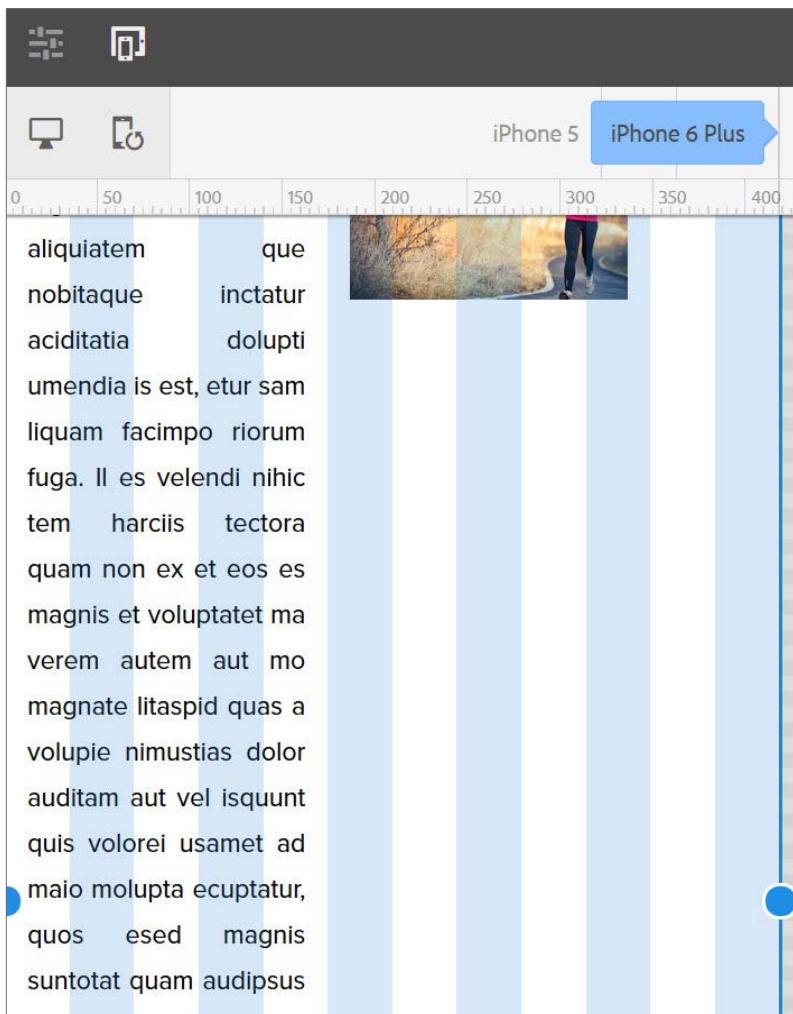
14. Scroll down and do the same for each of the two images. The text and images will rearrange themselves in the layout.



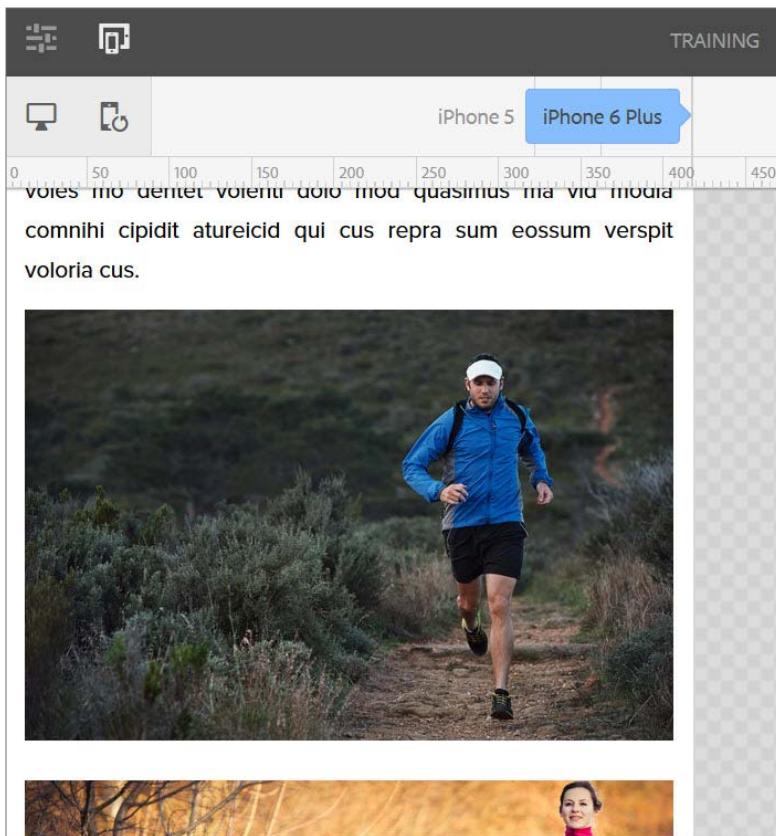
15. Select iPhone 6 Plus from the emulator toolbar to view how the page looks in iPhone 6 Plus.



16. In iPhone 6 Plus emulator, resize the Text Component to span twelve columns, to avoid squeezing the content within a page.

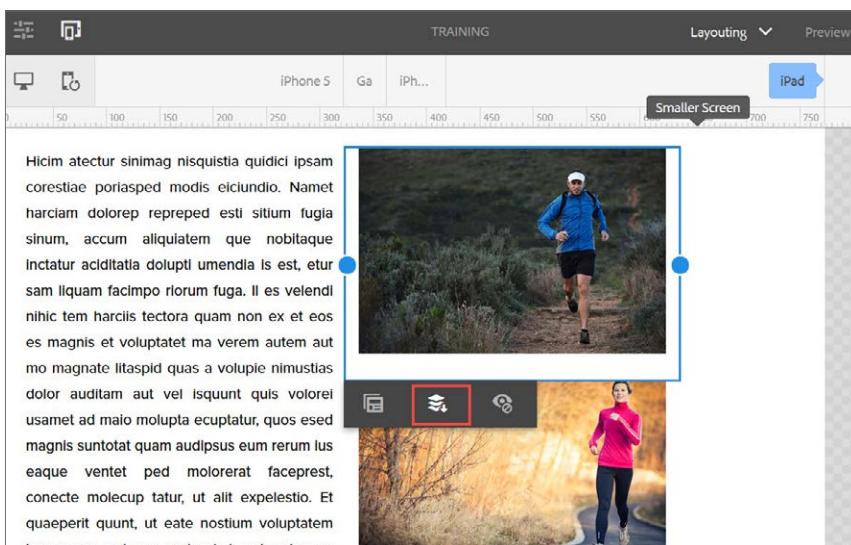


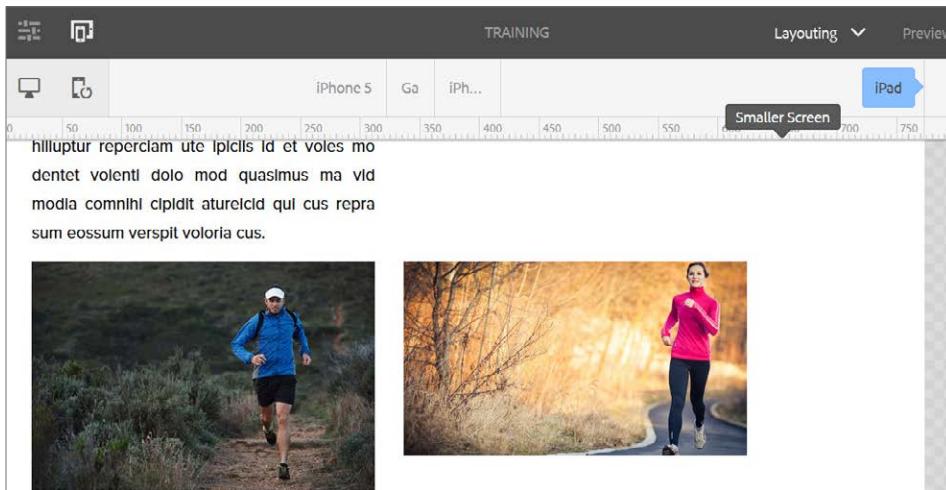
17. Do the same for images. Images will align themselves below the **Text** component.



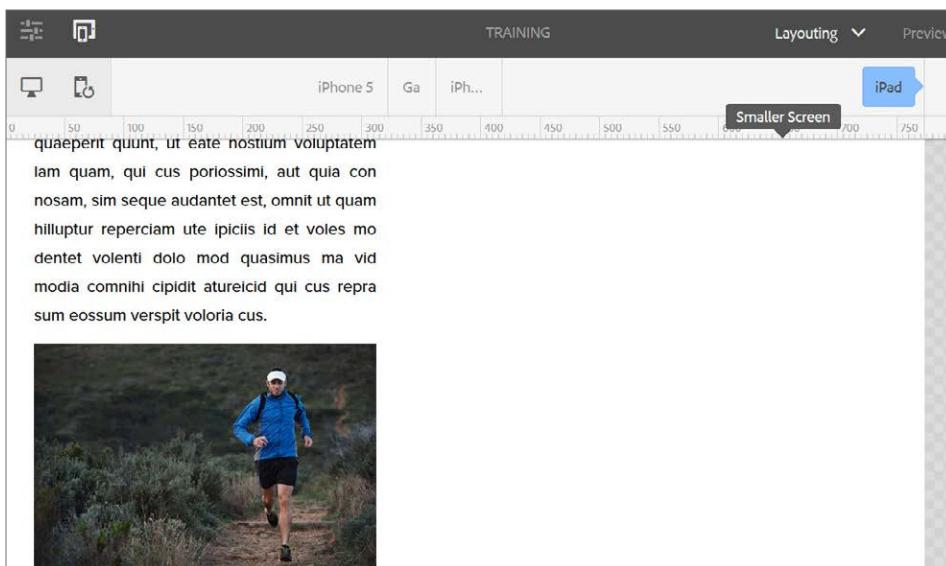
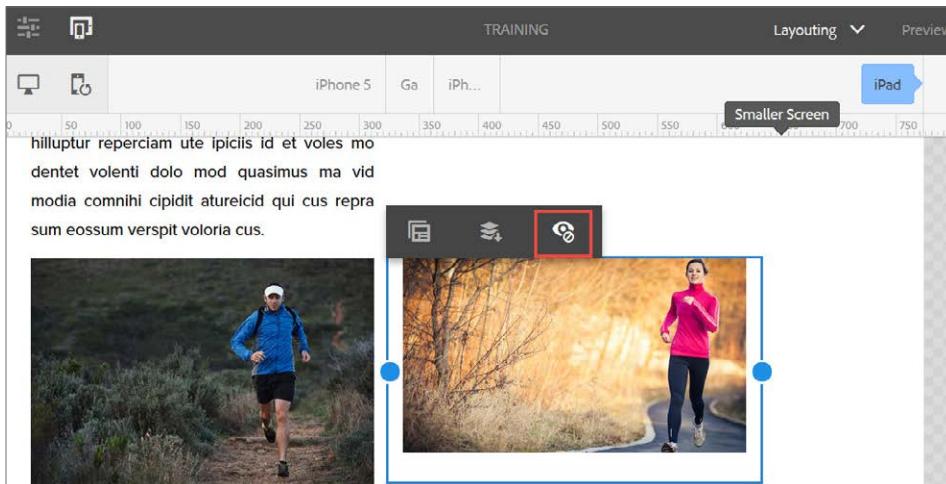
18. You can perform the following Layouting manipulations on a device group (Tablet):

- Float to new line**—Select **iPad** from the toolbar, select component, and click **Float to new line** icon. This moves the component to a new line within the layout, and prevents haphazard content flow.





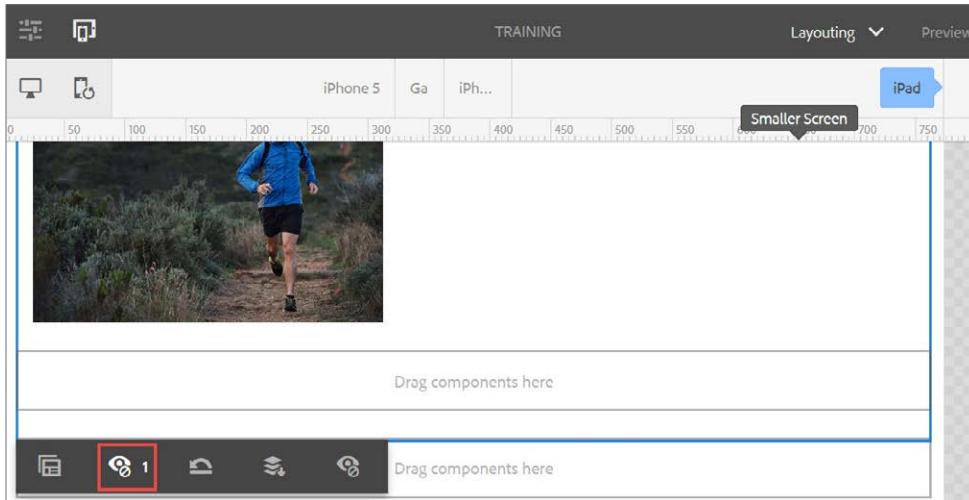
- b. Hide component**—Select a component and click **Hide component** to hide a component from the layout (Sometimes a piece of content does not work on a small screen).



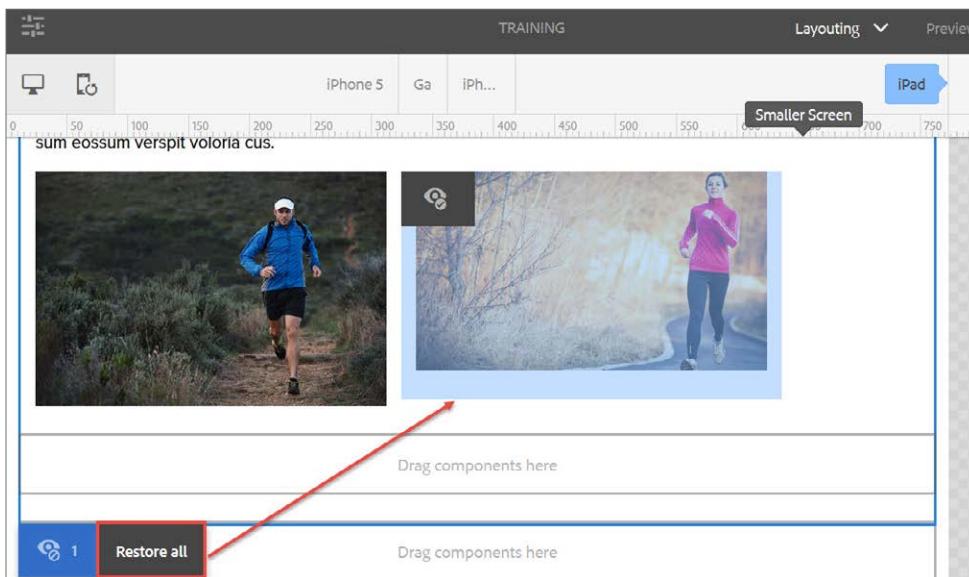
19. You can also restore all the hidden components within the layout.

To restore the hidden components in a layout:

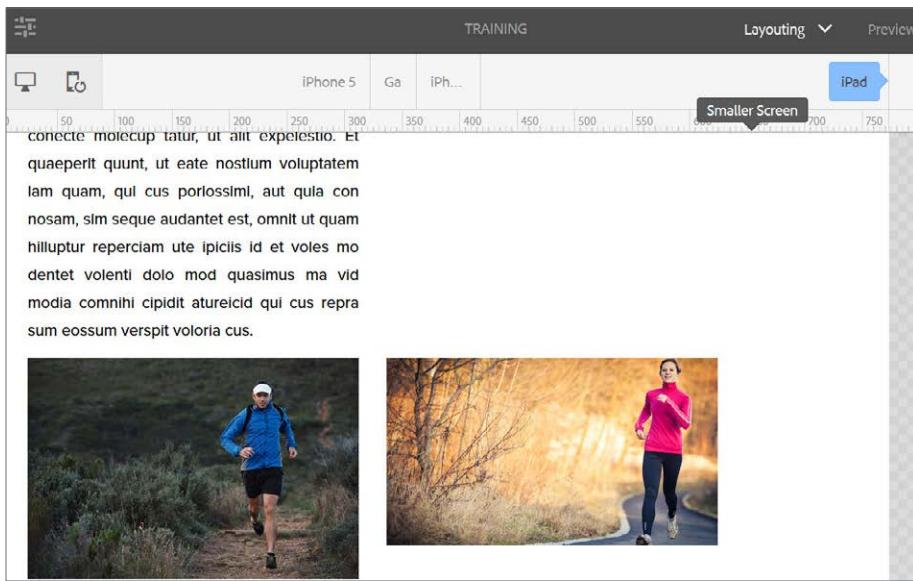
- i. Select the **Layout Container**, and then click **Show hidden components**. A toolbar opens.



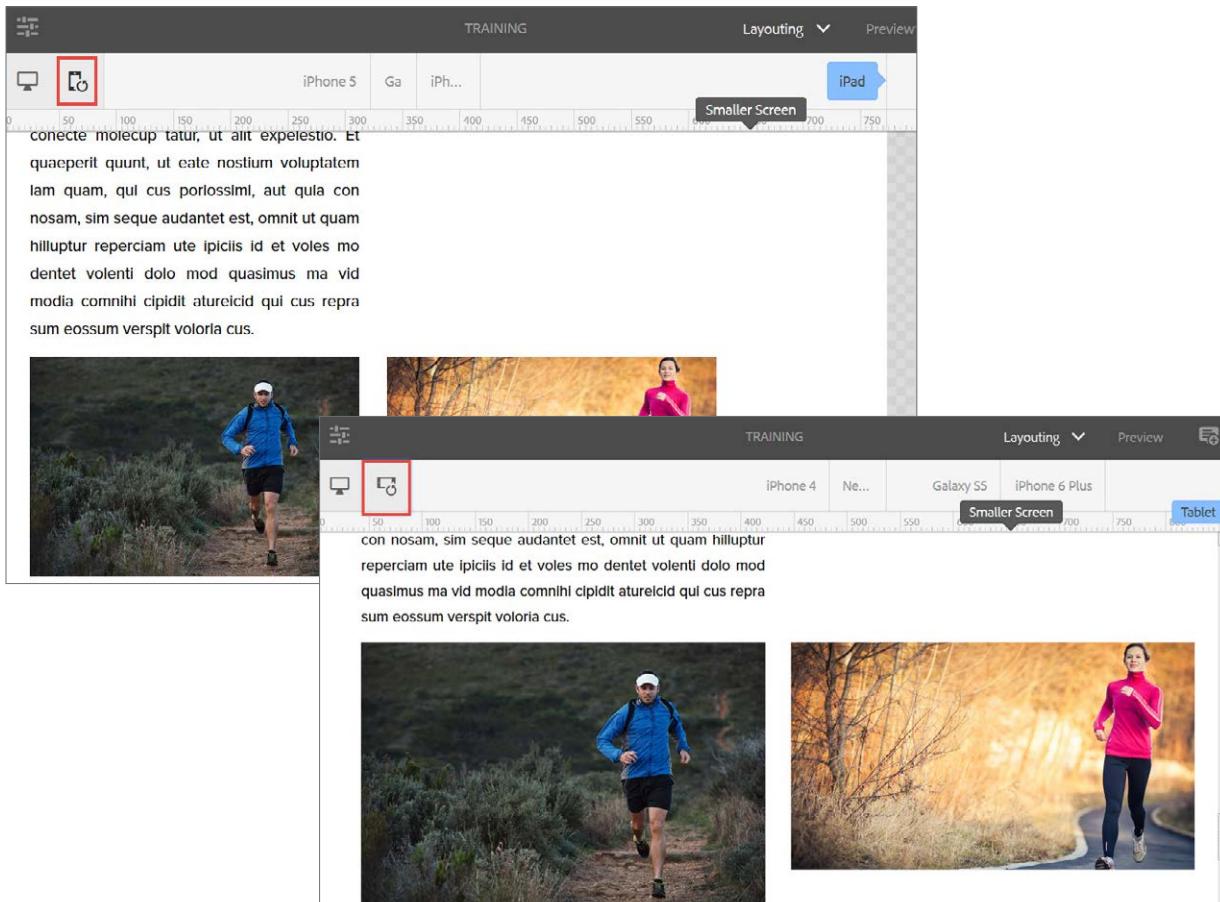
- ii. Click **Restore all** to view the hidden components in the layout.



All the hidden components will be visible within the layout.



c. **Rotate device**—you can rotate the emulator horizontally and vertically by clicking on **Rotate device**, to see how the page looks in different views (By default, the emulator is in vertical view).





### Task 3: Select multiple pages and add common properties to the pages

To edit properties of multiple pages:

1. Navigate to **Sites > We.Retail > English > Training**.
2. Enter the selection mode by clicking the **Select** icon from quick actions, and then select **Alpha\_<username>, Beta\_<username>, and Gamma\_<username>**. You can press Ctrl and click each thumbnail to multi-select.

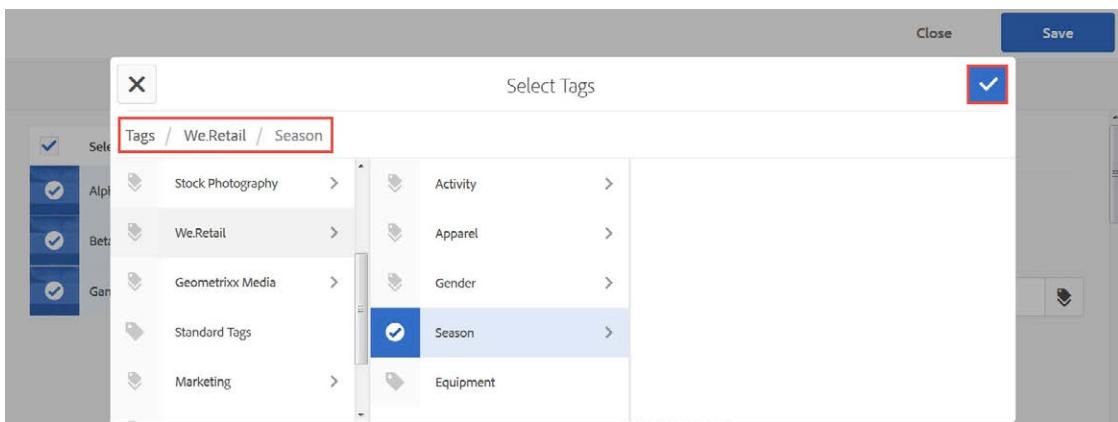
The screenshot shows the 'Training' folder in the AEM interface. Three pages are selected: 'Alpha', 'Beta', and 'Gamma'. The top navigation bar includes 'Create', 'Edit', 'View Properties' (which is highlighted with a red box), 'Copy', 'Publish', 'Publish Later', and a '3 selected' indicator. Below the navigation is a toolbar with icons for 'New', 'Edit', 'Delete', 'Preview', and 'Publish'. The main content area displays the three selected pages with their respective titles, last modified times (3 hours ago), and publication status (Not published).

3. Click **View Properties** from the actions bar. You will be in bulk editing mode.

Let's add a common property such as tags to all the selected pages. Ensure you are in **BASIC** tab.

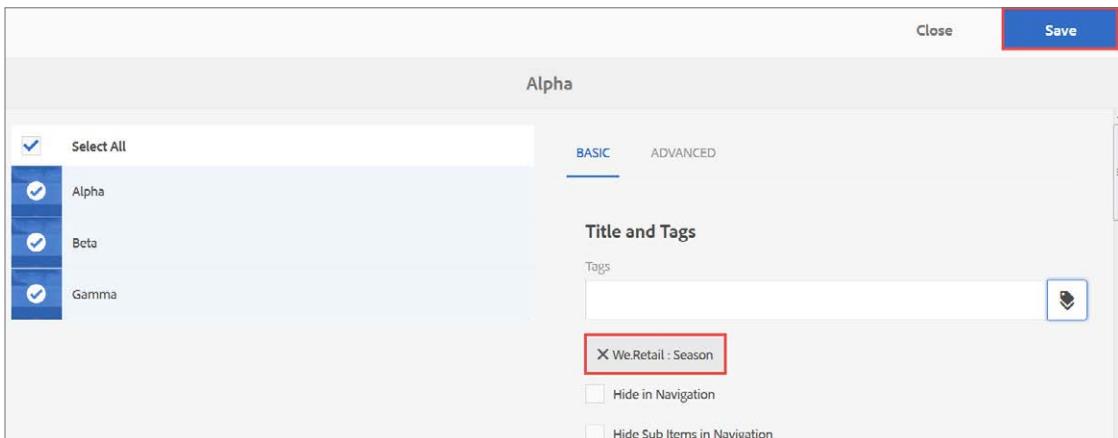
The screenshot shows the 'View Properties' dialog for the 'Alpha' page. The 'BASIC' tab is selected. On the left, there is a sidebar with checkboxes for 'Select All' and individual pages 'Alpha', 'Beta', and 'Gamma', all of which are checked. On the right, the 'Title and Tags' section is displayed. It contains a 'Tags' input field with the value '#tag' (highlighted with a red box) and several checkboxes for navigation settings: 'Hide in Navigation', 'Hide Sub Items in Navigation', and 'Navigation Root Node'. At the top right of the dialog is a 'Save' button.

4. Click **Browse** to add tags under **Title and Tags**.



5. Select **We.Retail / Season** tag, and then click **Confirm**.

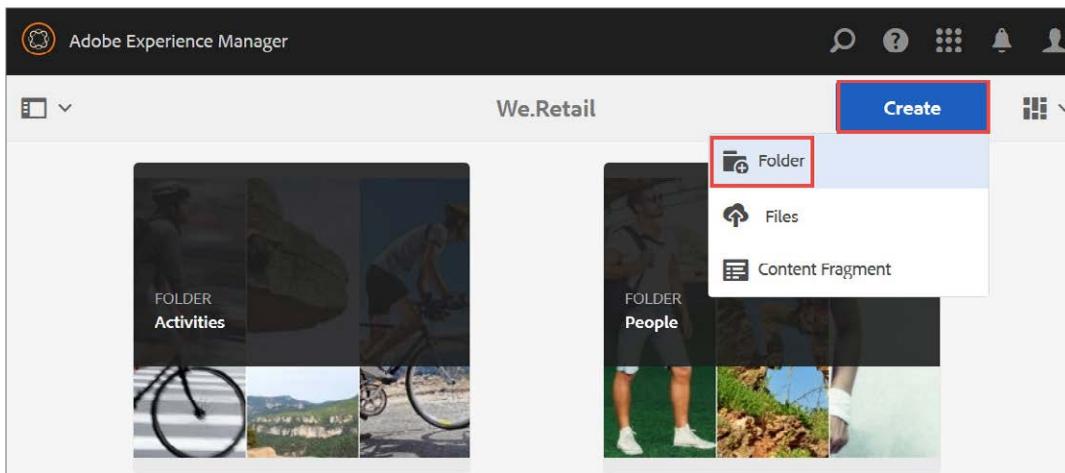
6. Click **Save** in the Properties screen. Notice **Season** tag is added to all the selected pages.



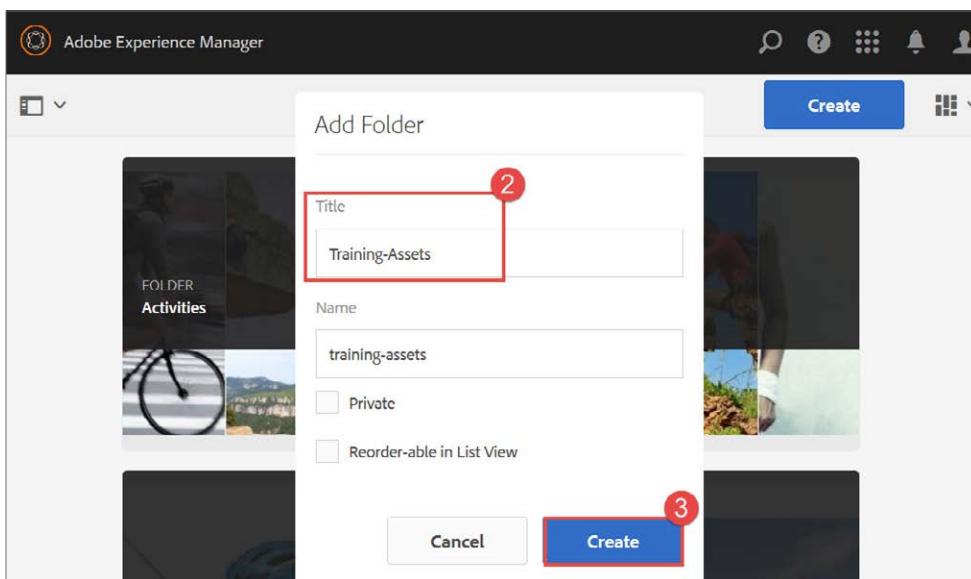
## Task 4: Create a folder, upload assets, and perform additional actions on assets

To organize assets, let's create a folder:

1. Navigate to the **Assets > We.Retail**, and click **Create > Folder** from the actions bar.



2. In the **Add Folder** dialog box, add **Title** to the folder (for example, **Training-Assets\_<username>**). By default, Assets uses the **Title** as the **Name**.
3. Click **Create** to complete the process.

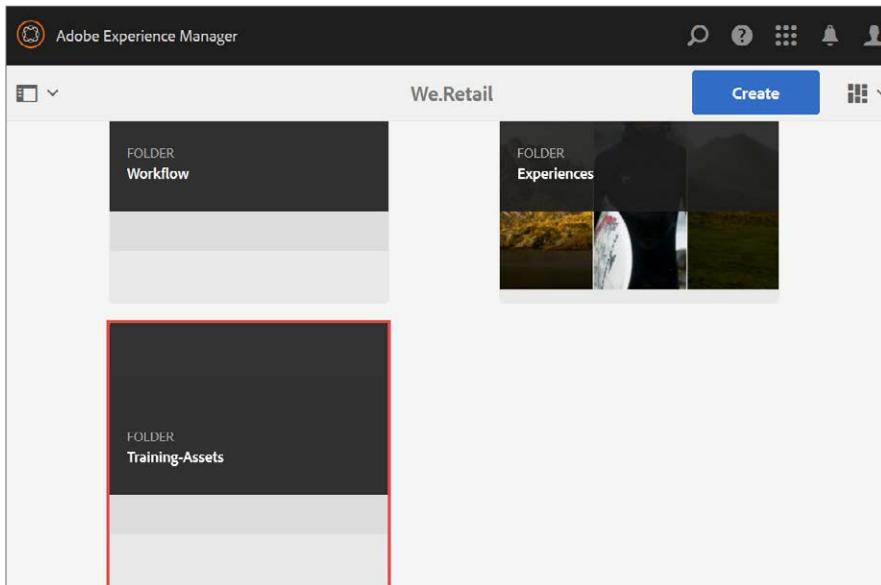


---

 **NOTE:** It is important to create your folder with a unique identifier so you can identify your folder amongst those of your peers being created in the same environment.

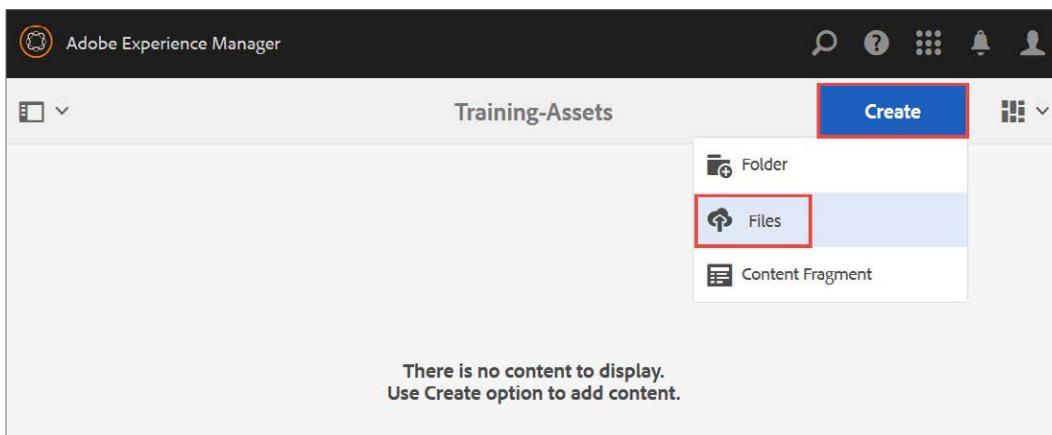
---

The new folder appears within **We.Retail** folder.

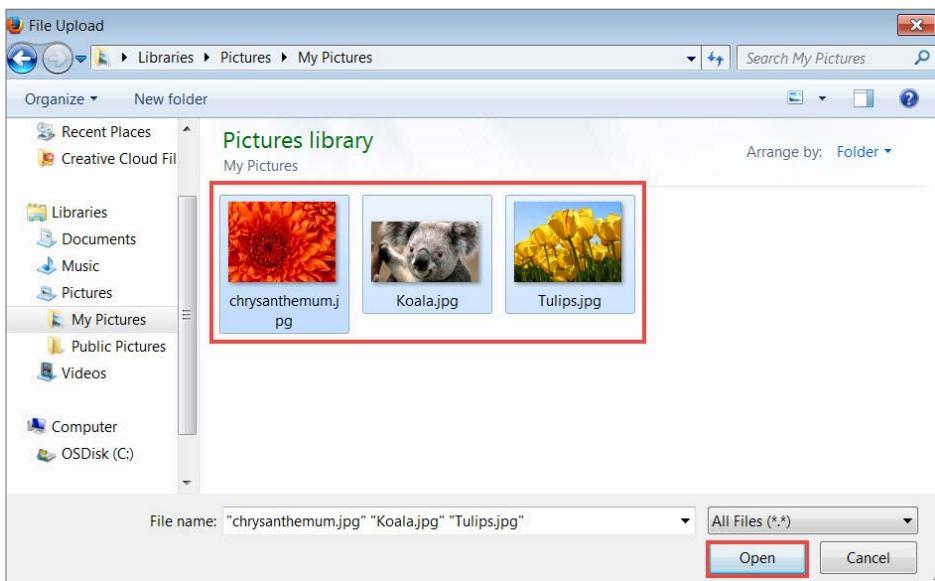


To upload new assets from your file system to the folder, which you just created:

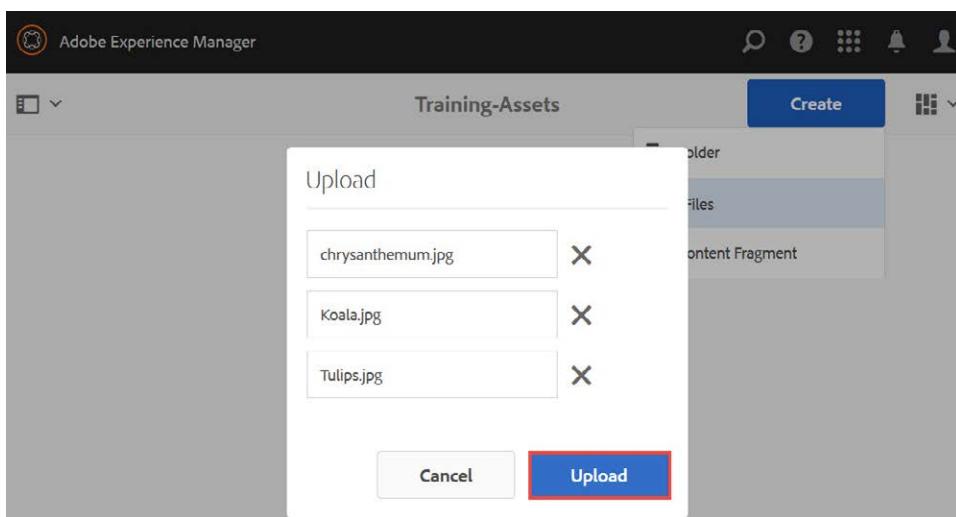
1. Click the **Training-Assets\_<username>** folder to open it.
2. Click **Create > Files** from the actions bar. **File Upload** dialog box appears.



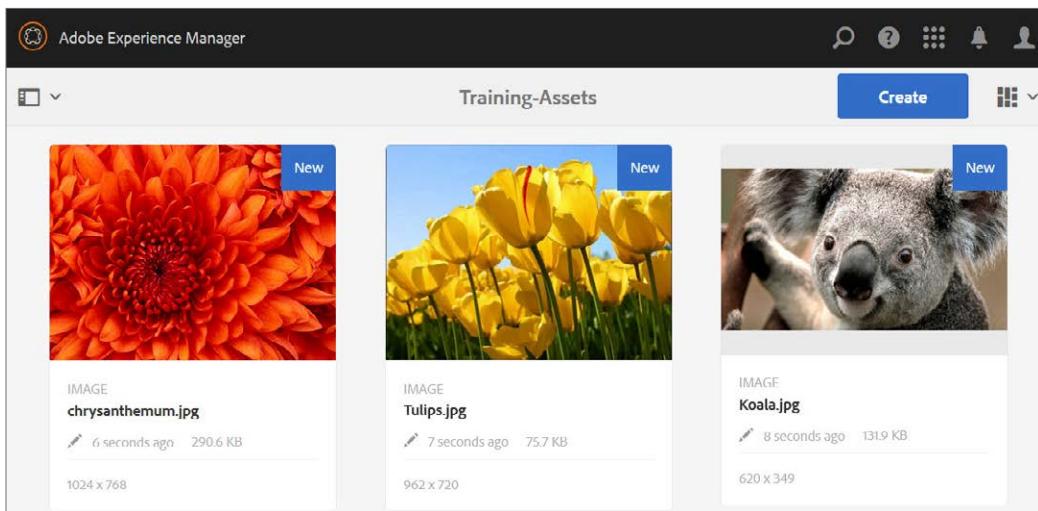
3. Select the images, you want to upload from the file system, and then click **Open**.



4. Click **Upload** from the **Upload** dialog box that opens.

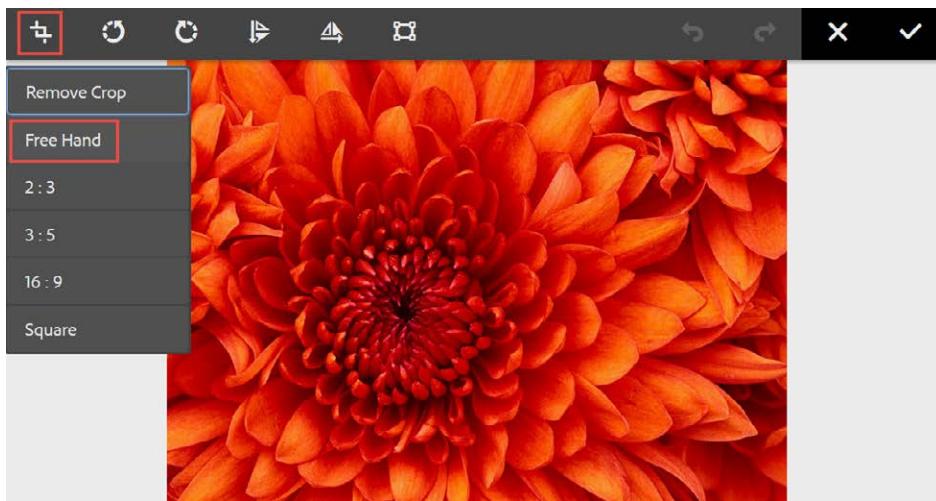


The images from your file system are added to the new folder, and can be used for the pages.



While using assets in pages, you may need to edit (crop, rotate, and flip) it according to the requirement.  
To edit an asset:

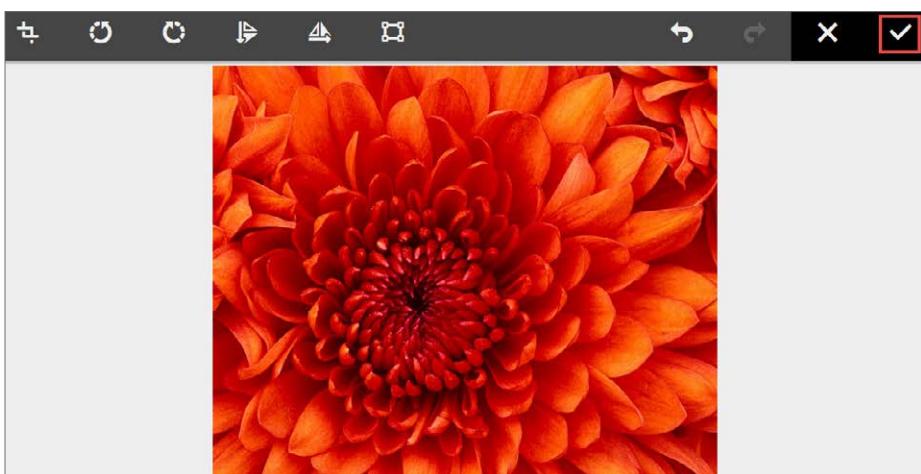
1. Navigate to the **Training-Assets\_<username>** folder and click it to open.
2. Select the asset you want to edit, and then click **Edit** from actions bar. The Asset Editor with edit toolbar opens.
3. To crop the image, click the **Start Crop** icon, and then choose the **Free Hand** option from the drop-down menu



4. Drag and resize the pointers according to your requirement, and then click **Confirm** in the top-right corner (checkmark).



5. Click **Finish** to confirm the cropping.

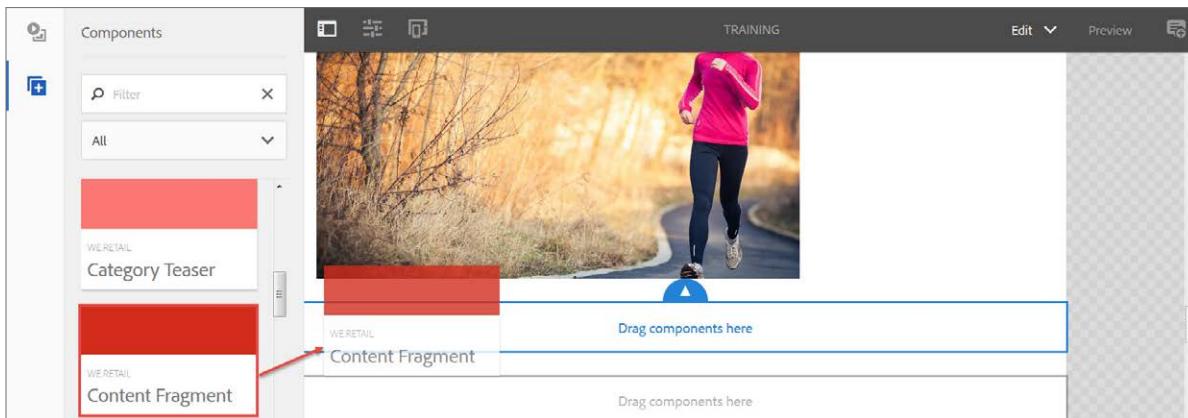


The **Training-Assets\_<username>** folder is refreshed; you can view the cropped version of the image in the folder.

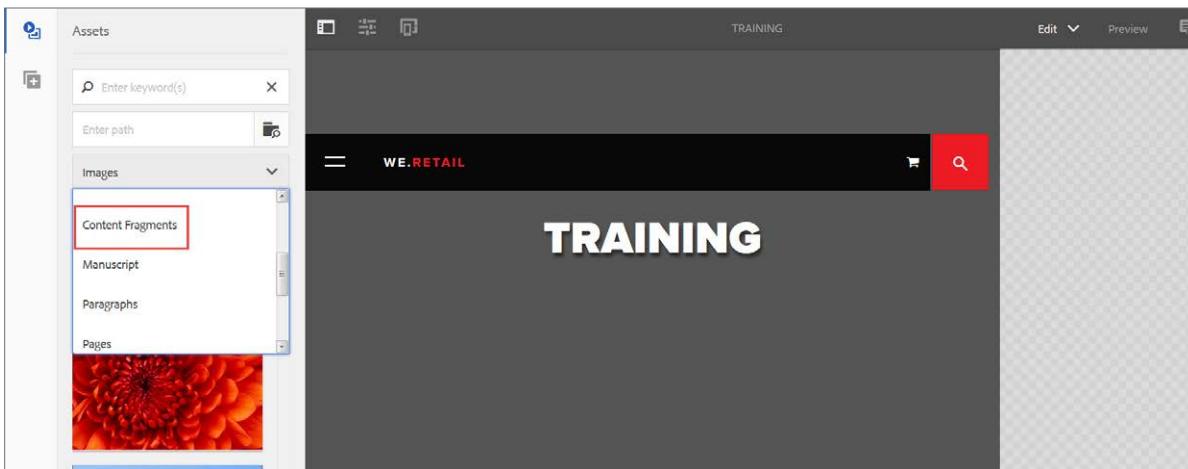
Now that you have uploaded new assets, let's go back to **Training\_<username>** page, add content fragment and the new assets to the page.

To add content fragment and assets to the page:

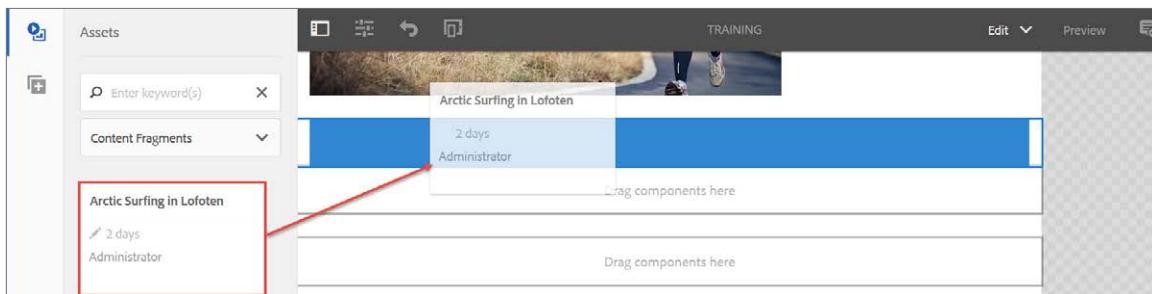
1. Navigate to **Sites > We.Retail > United States > English**. Open the **Training\_<username>**. Make sure the page is opened in **Edit** mode (by verifying the Edit drop-down is in the upper-right corner).
2. Click **Side Panel > Components**, look for **Content Fragment** component, and then drag and drop it onto the page.



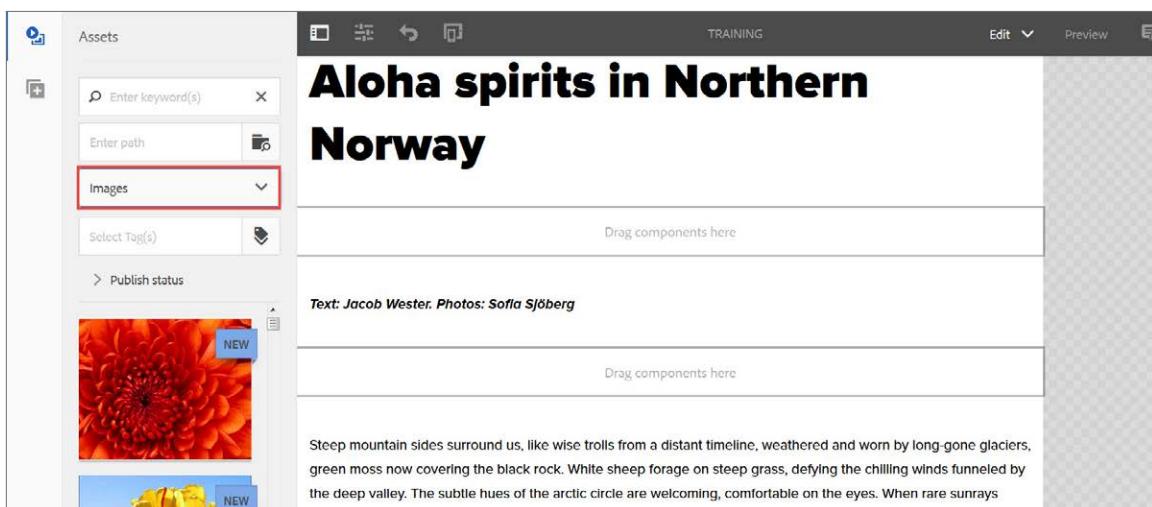
3. Click **Assets** browser, select **Content Fragment** from **Images** drop-down. All the available content fragments appear.



4. Drag and drop **Arctic Surfing in Lofoten** onto the **Content Fragment** component added to the page. The article will be added to the page.

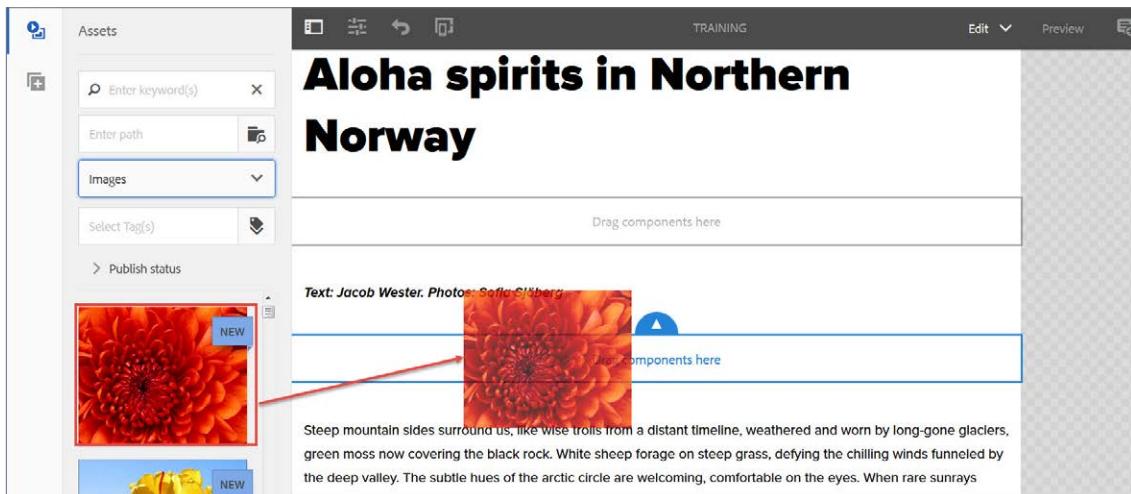


5. In **Assets** browser, select **Images** from the drop-down.



Now that you have added a Content Fragment, let's add new assets to it, which were uploaded from your file system.

6. Drag and drop an image onto the **Drag components here** area in the Content Fragment. The image will be added to the Content Fragment.



You now know how to add various assets such as Content Fragments and Images to pages.

Let's look at additional actions such as Copy, Move and Rename, Publish, Edit Asset Properties, Delete, and so on that can be performed on assets.

To edit asset properties:

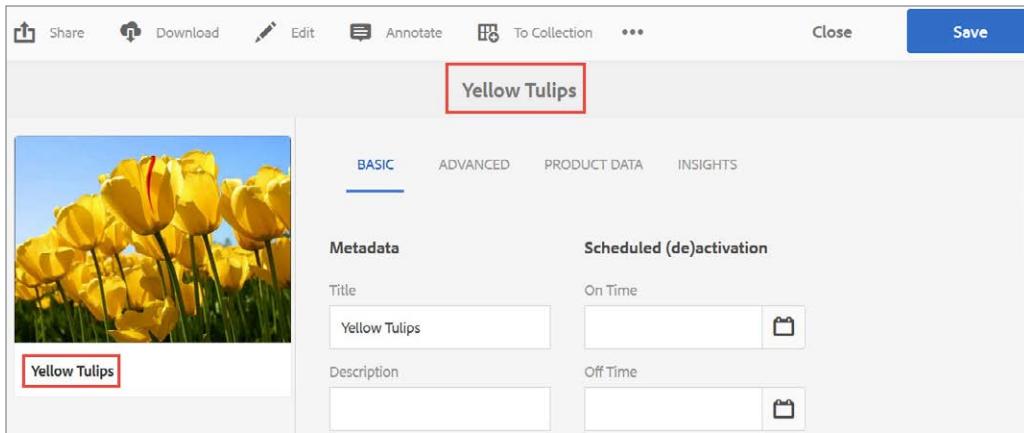
1. From the **Assets** console, open the **Training-Assets\_<username>** > **We.Retail** folder and hover the cursor over one of the assets you want to edit.
2. Click the **View Properties** icon from quick actions.

The screenshot shows the Adobe Experience Manager Assets interface. It displays two images in the 'Training-Assets' folder: a red chrysanthemum flower and a field of yellow tulips. The yellow tulip image has a red box drawn around its 'View Properties' icon in the quick actions menu, which includes icons for checkmark, download, edit, annotate, and more.

3. Edit the Metadata from **BASIC** tab. Let's add a **Title** for this image. Give the desired **Title** for the image (for example, **Yellow Tulips\_<username>**), and then click **Save**.

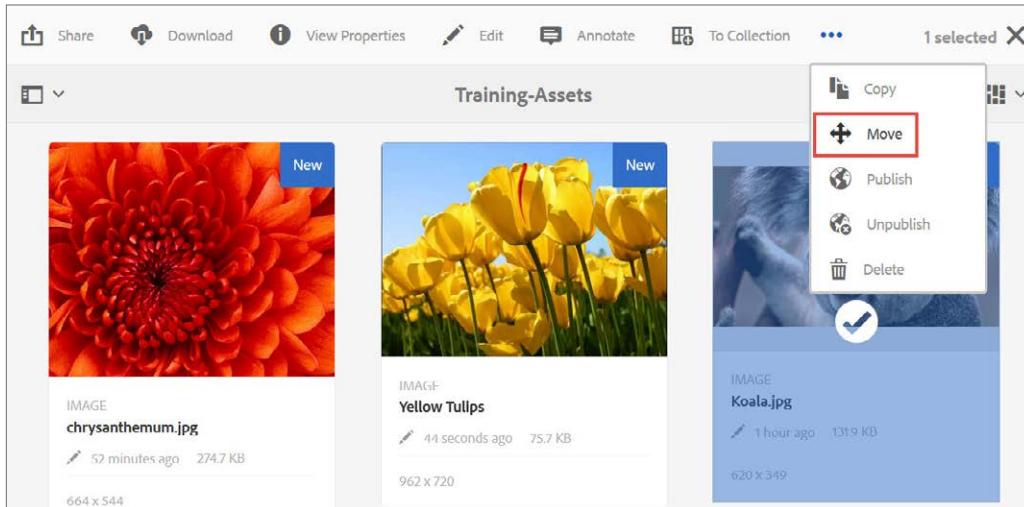
The screenshot shows the 'Tulips.jpg' asset properties dialog. The 'BASIC' tab is selected, indicated by a red box. The 'Title' field is also highlighted with a red box and contains the value 'Yellow Tulips'. Other tabs like 'ADVANCED', 'PRODUCT DATA', and 'INSIGHTS' are visible. The 'Save' button at the top right is also highlighted with a red box.

You will see the new title of the image.



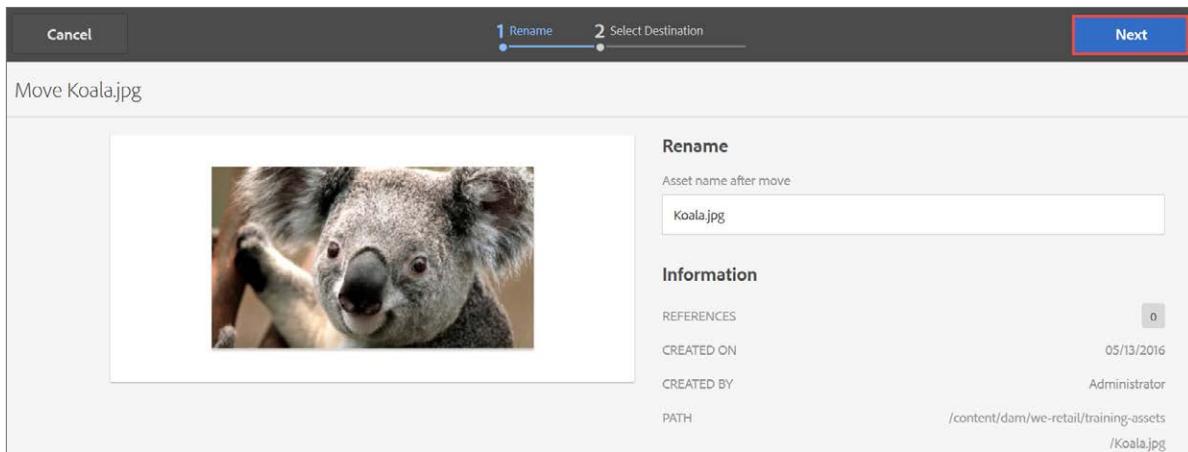
To move and rename an asset:

1. Select an asset, and then select **Move** from ...More drop-down.

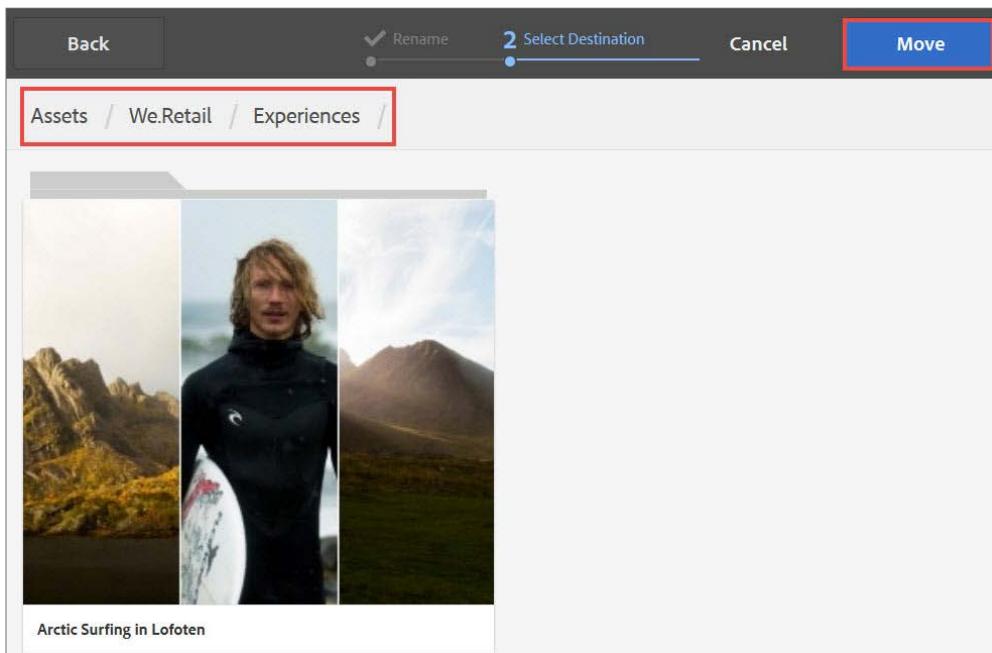


2. In **Rename** wizard, if you want to change the name of the asset. Let's retain the same name.

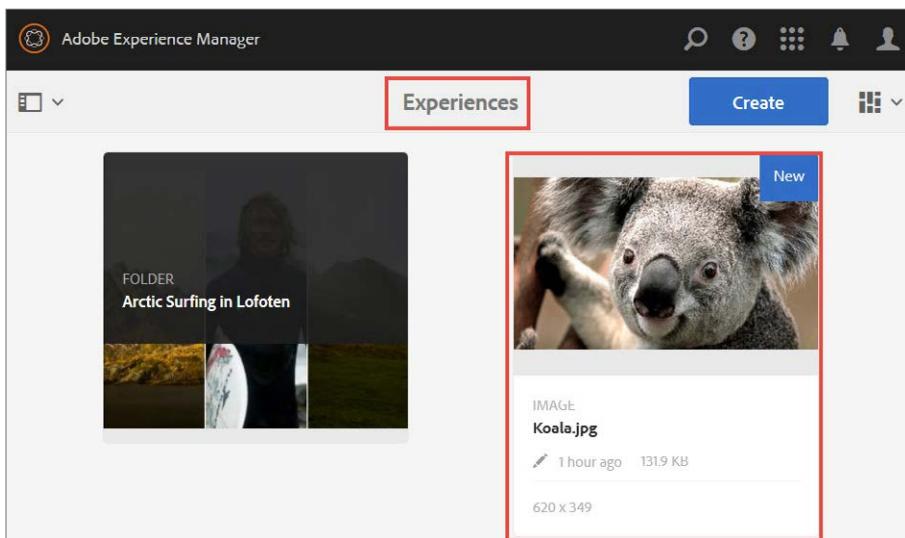
3. Click **Next** to select the destination folder.



4. Select the destination folder. For example, Assets / We.Retail / Experiences, and then click **Move**.

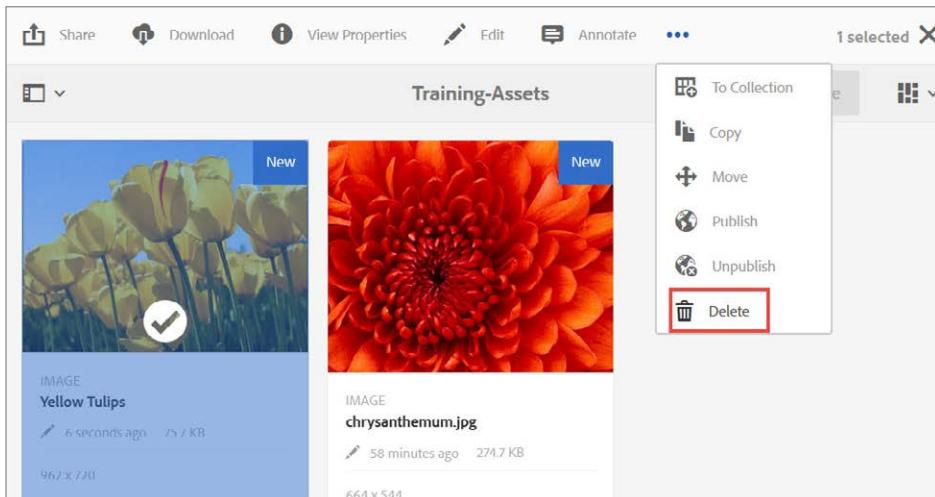


The asset is moved to the destination folder.

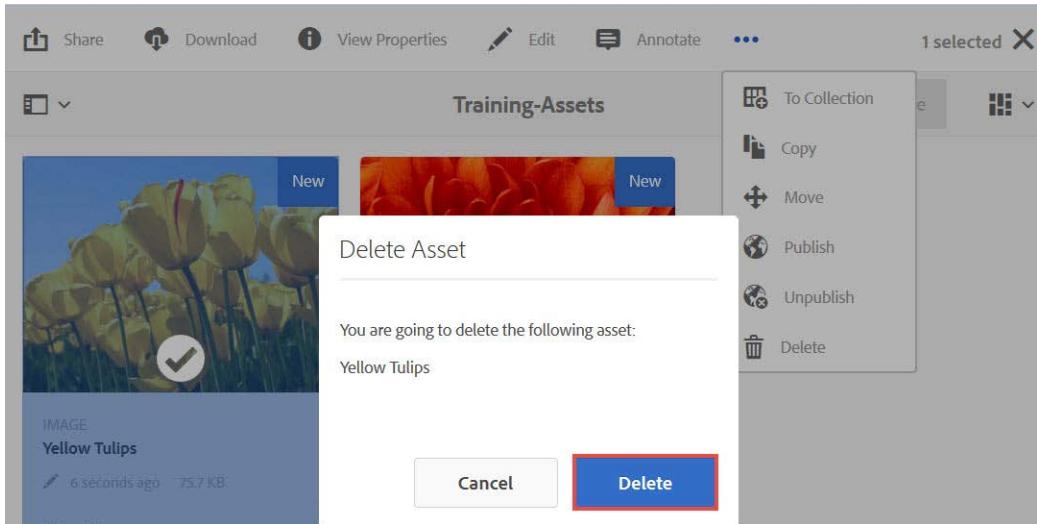


To delete an asset:

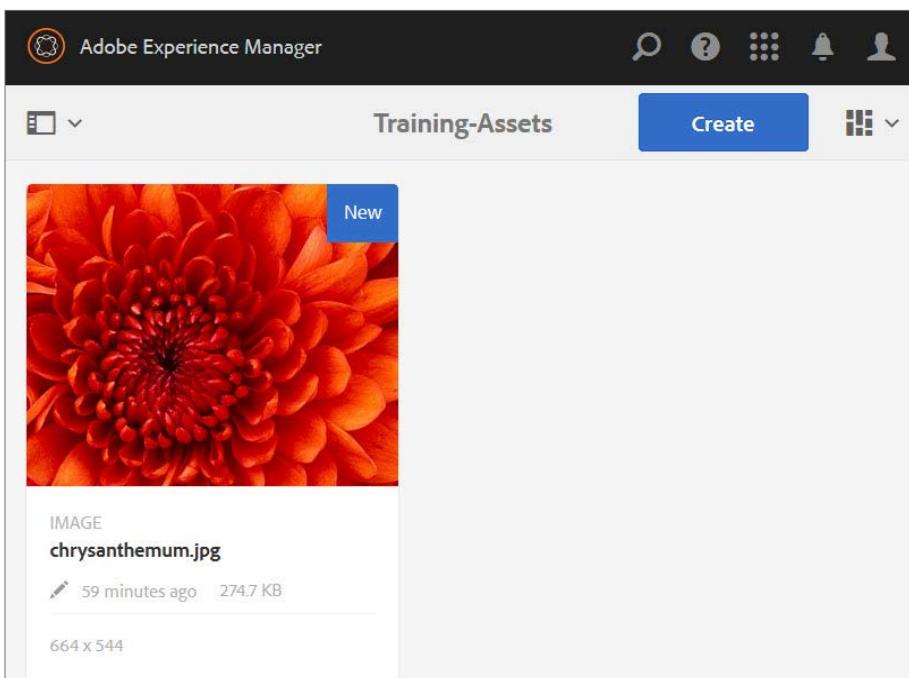
1. Select the asset you want to delete from the **Training-Assets\_<username>** folder.
2. Select **Delete** from ...More drop-down.



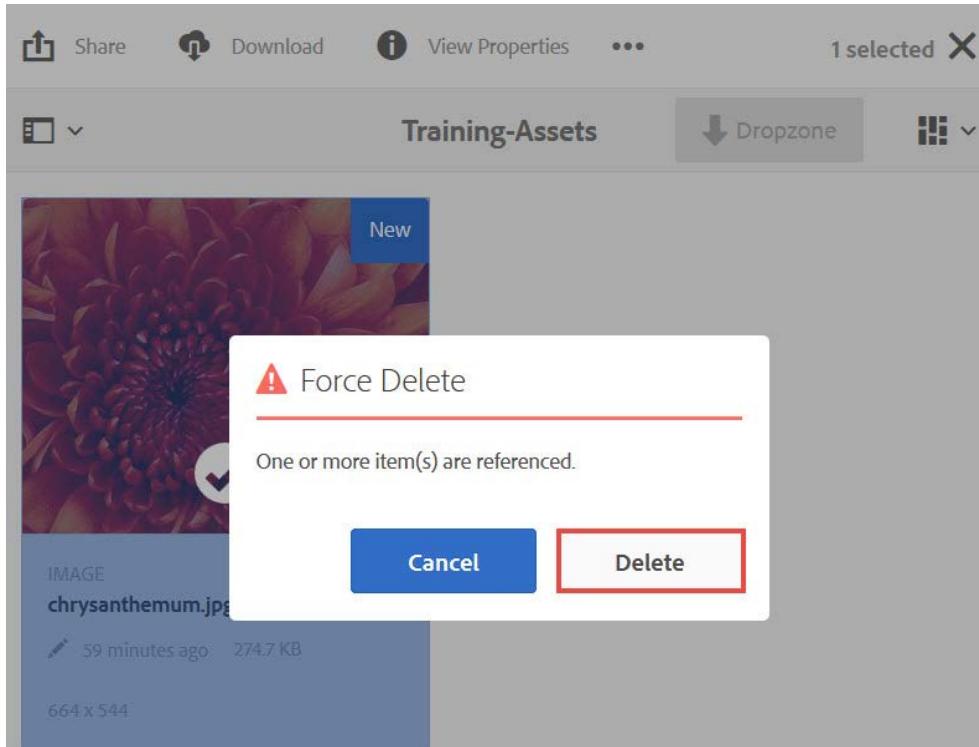
3. Click **Delete** in the **Delete Asset** dialog box.



The asset is deleted from the folder.



4. If you try to delete an asset having references, a **Force Delete** message box will inform you that **One or more item(s) are referenced**. Click **Delete** to delete the asset and its references.



5. Once you delete the asset, it will be deleted from the pages using the asset. For example, the asset, which was deleted was used in **Training\_<username>** page. If you open the page, you will not be able to see the image anymore in the page.

A screenshot of a page in Adobe Experience Manager. The top navigation bar includes icons for file operations and a dropdown menu labeled "Edit". The main content area features a large heading "Aloha spirits in Northern Norway". Below the heading is a text block: "Text: Jacob Wester. Photos: Sofia Sjöberg". Underneath this is a red-bordered placeholder box with the text "Drag components here". At the bottom of the page is a paragraph: "Steep mountain sides surround us, like wise trolls from a distant timeline, weathered and worn by long-gone glaciers, green moss now covering the black rock. White sheep forage on steep grass, defying the chilling winds funneled by".



## Task 5: Reorder pages within the site structure and perform various operations on a page

You can reorganize the pages and subpages within a site using Reorder option, and also perform actions such as Copy, Move and Rename, and Delete pages.

To reorder pages:

1. Open the **Training\_<username>** page in **Preview** mode.
2. Hover over **TRAINING** in the header. You will view **Alpha**, **Beta**, and **Gamma** subpages respectively.

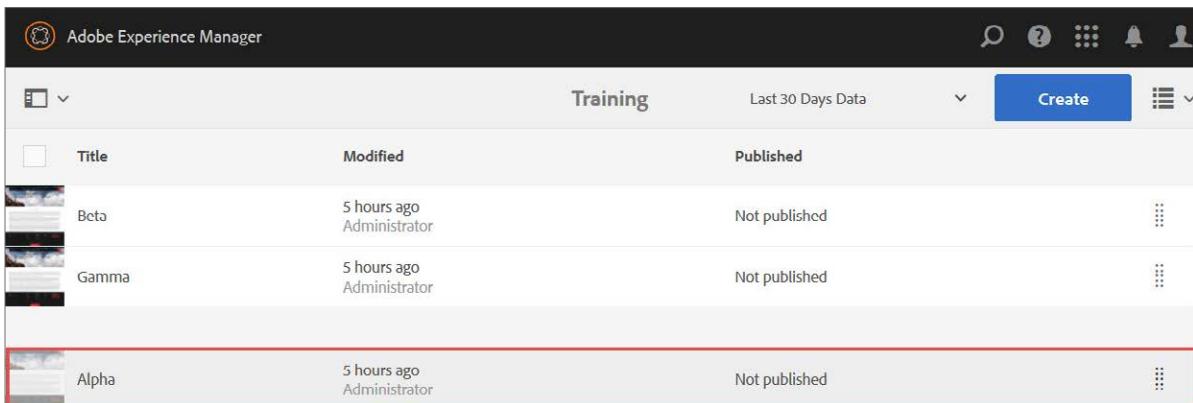
The screenshot shows a dark-themed website header with a navigation bar. The 'TRAINING' menu item is highlighted with a red box. Below the header, there's a main content area with a large 'TRAINING' title. Underneath the title, there's a horizontal menu with three items: 'Alpha', 'Beta', and 'Gamma', all enclosed in a red box.

If you want to rearrange the order the subpages to **Beta\_<username>**, **Gamma\_<username>**, and **Alpha\_<username>**.

3. Navigate to **Sites** console > **We.Retail** > **United States** > **English** > **Training\_<username>**.
4. Select **List View** from **View Switcher**. The pages appear in the form of a list.

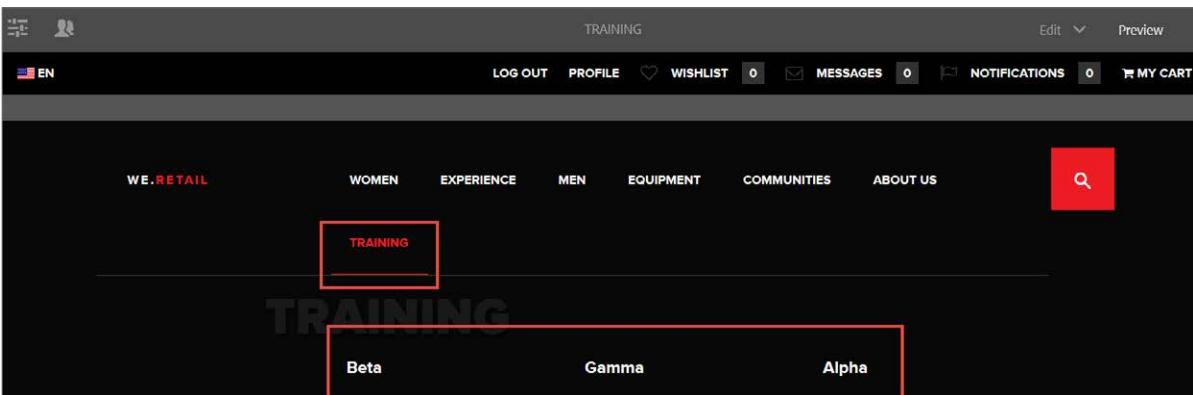
The screenshot shows the Adobe Experience Manager Sites console. The top navigation bar includes 'Create' and 'List View' buttons, with 'List View' highlighted with a red box. Below the navigation, there are three cards representing pages: 'Alpha', 'Beta', and 'Gamma'. Each card displays a preview thumbnail, the page name, and a timestamp ('5 hours ago').

5. Click and hold the right handlers, and then drag and drop the **Alpha\_<username>**. page below the **Gamma\_<username>** page.



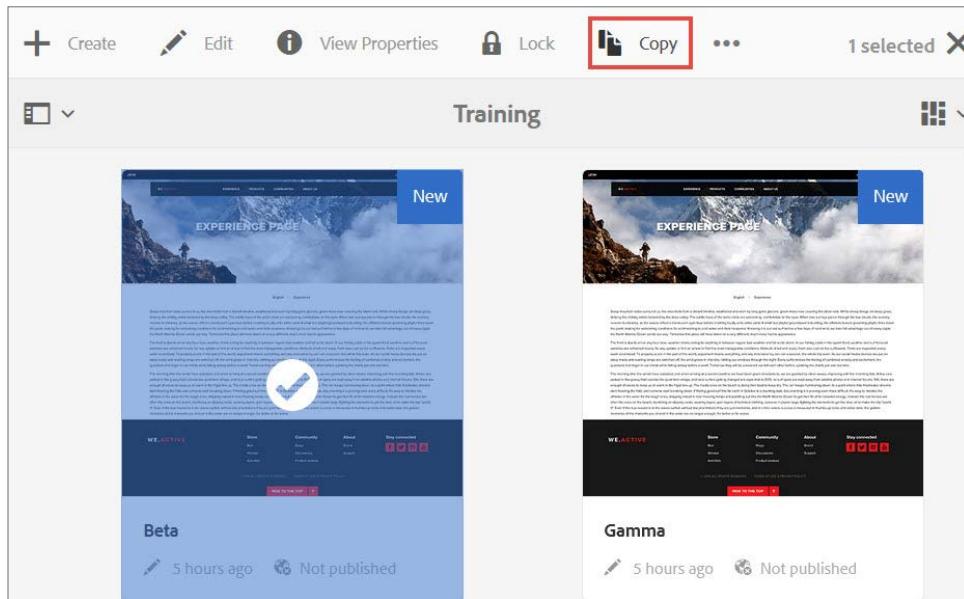
Title	Modified	Published	More
Beta	5 hours ago Administrator	Not published	⋮
Gamma	5 hours ago Administrator	Not published	⋮
Alpha	5 hours ago Administrator	Not published	⋮

6. Open the **Training\_<username>** in **Preview** mode, and then flow Step 2 to view the modified navigation.

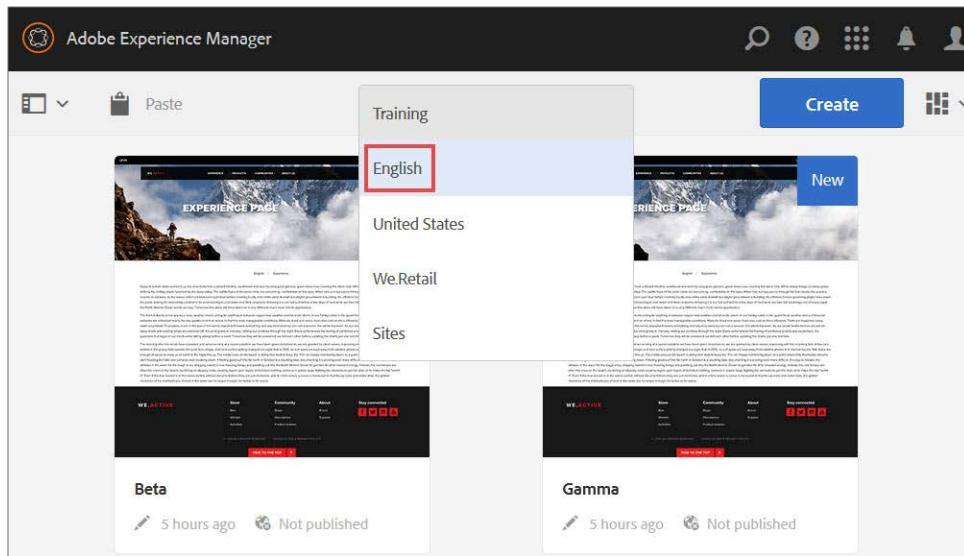


To copy a page:

1. Select the page you want to copy, click **Copy** from actions bar (for example, **Training\_<username>** > **Beta\_<username>**).



2. To navigate to the English page, select **English** from **Training\_<username>** drop-down.



3. From **English**, navigate to **Experience** page, and then click **Paste**.

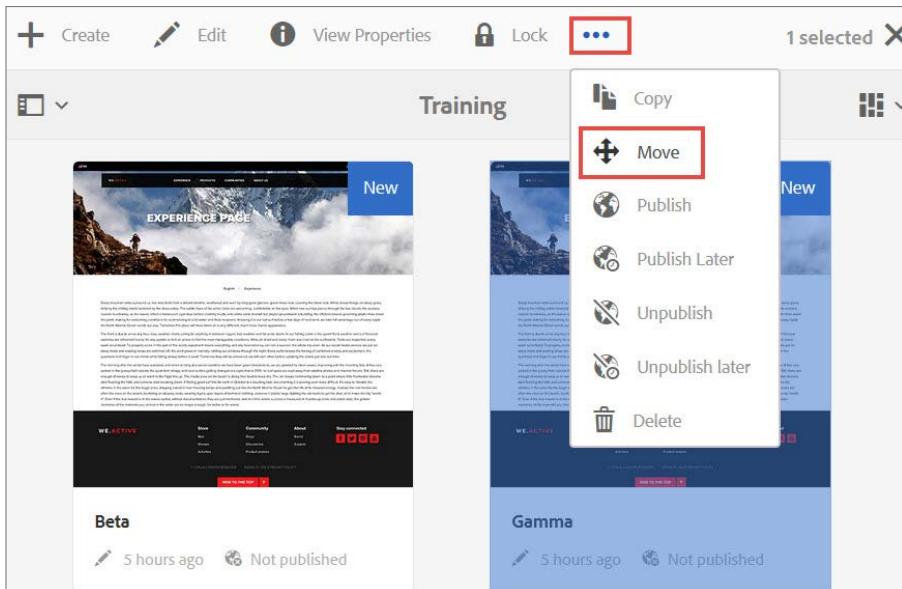
The screenshot shows the Adobe Experience Manager interface with three Experience pages listed. The first page's toolbar has a red box around the 'Paste' button. The second page's title 'Experience' is highlighted with a red box. The third page's title 'Experience PAGE' is also highlighted with a red box.

**Beta\_<username>** gets added as a subpage of Experience page.

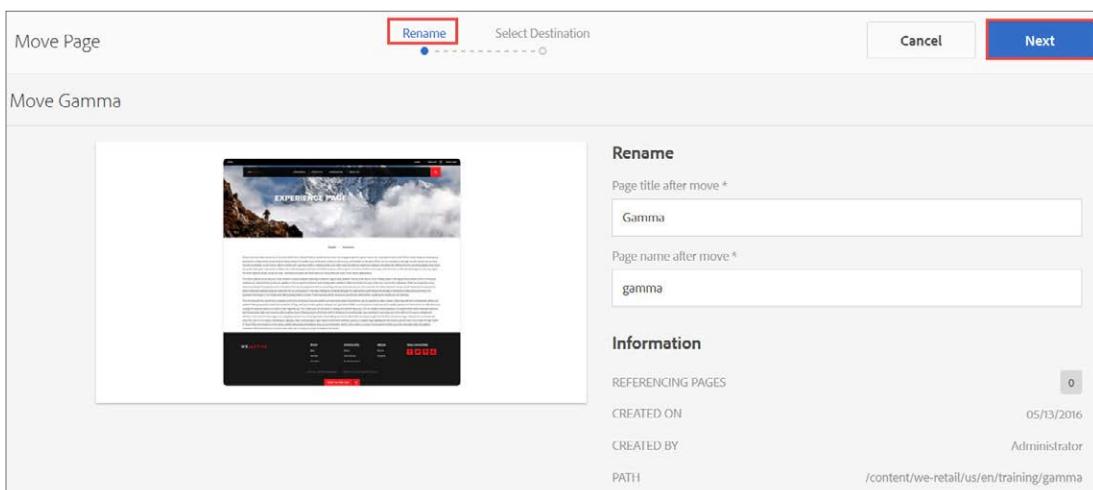
The screenshot shows the Adobe Experience Manager interface with two Experience pages. The left page is titled 'Beta' and has a red box around its title. The right page is titled 'Arctic Surfing In Lofoten'.

To move and rename a page:

1. Navigate to the location and select a page for example, **Gamma\_username**, which you want to move to a new location.
2. Click ...More, and then select **Move** from the drop-down.



3. The **Move** wizard opens with the following steps:
  - a. **Rename**: Specify the name you want the page to have after it is moved in **Page title after move** and **Page name after move** fields. Let's retain the same title and name, then click **Next** to continue.



**b. Select Destination:** Click the arrows beside a site and pages and select a page within which you want to move the page, and the click **Move**.

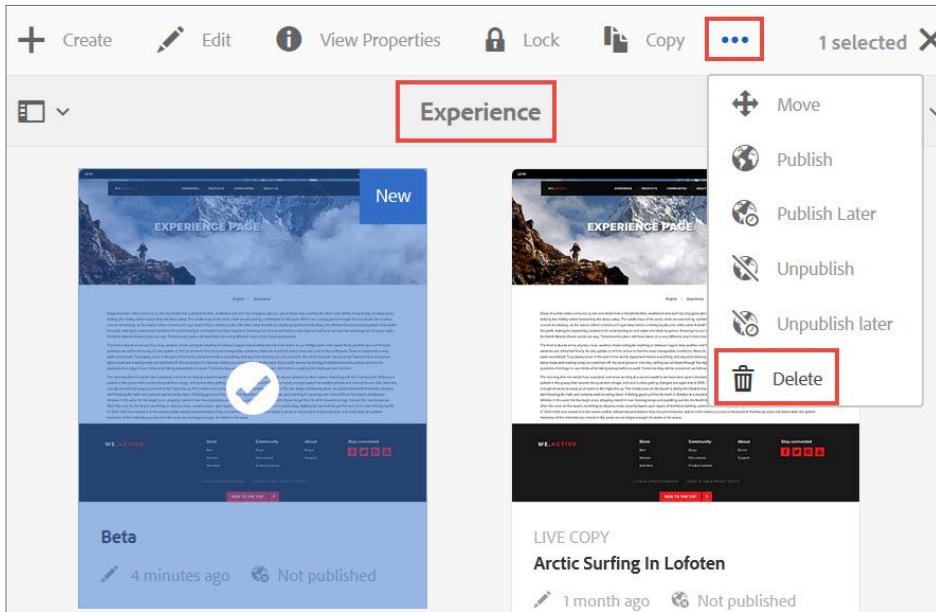
The screenshot shows the 'Move Page' interface in Adobe Experience Manager. At the top, there are buttons for 'Rename' and 'Select Destination' (which is highlighted with a red box). Below that is a breadcrumb navigation: 'Campaigns' > 'Communities' > 'English' > 'Women'. To the right of the breadcrumb, there is a list of destination pages: 'Experience', 'Men', 'Equipment', 'Communities', 'About Us', 'Products' (which has a checkmark icon and is highlighted with a red box), and 'Training'. On the left, there is a sidebar with various site and page options.

The page is moved to the new location selected in the previous step.

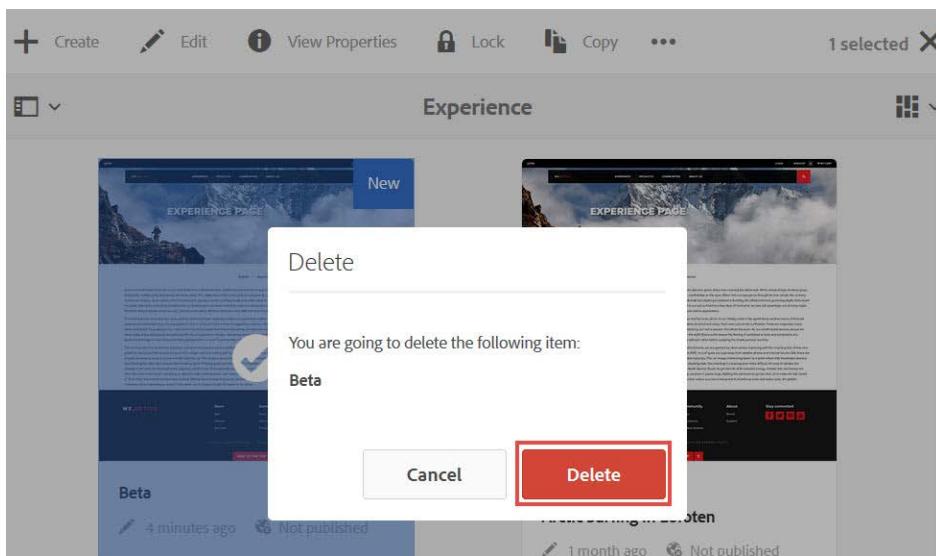
The screenshot shows the Adobe Experience Manager interface with two pages displayed side-by-side. The left page is titled 'EXPERIENCE PAGE' and is highlighted with a red box, indicating it is the new location. The right page is titled 'LIVE COPY Men' and is labeled '1 month ago' and 'Not published'. Both pages show a grid of backpack products.

To delete a page:

1. Select the **Beta\_<username>** (from **English > Experiences**) you want to delete using the selection mode.
2. Click ...More, and then select **Delete** from the drop-down.



3. Click **Delete** in the confirmation dialog box.



If the page has no references, the page will be deleted.

The screenshot shows the Adobe Experience Manager interface. At the top, there's a navigation bar with icons for search, help, notifications, and user profile. Below the navigation is a toolbar with a 'Create' button and other icons. The main area is titled 'Experience' and contains two preview cards for 'EXPERIENCE PAGE'. Each card displays a thumbnail image of a person standing on a rocky mountain peak, followed by the page title and a brief description. The left card is titled 'Arctic Surfing In Lofoten' and the right card is titled 'Summit Success in the Himalayas'. Both cards show a status bar at the bottom indicating they are 'LIVE COPY' and 'ACTIVE'. The right card also includes a timestamp '1 month ago' and a note 'Not published'.



## Task 6: Create a page version

To create a page version:

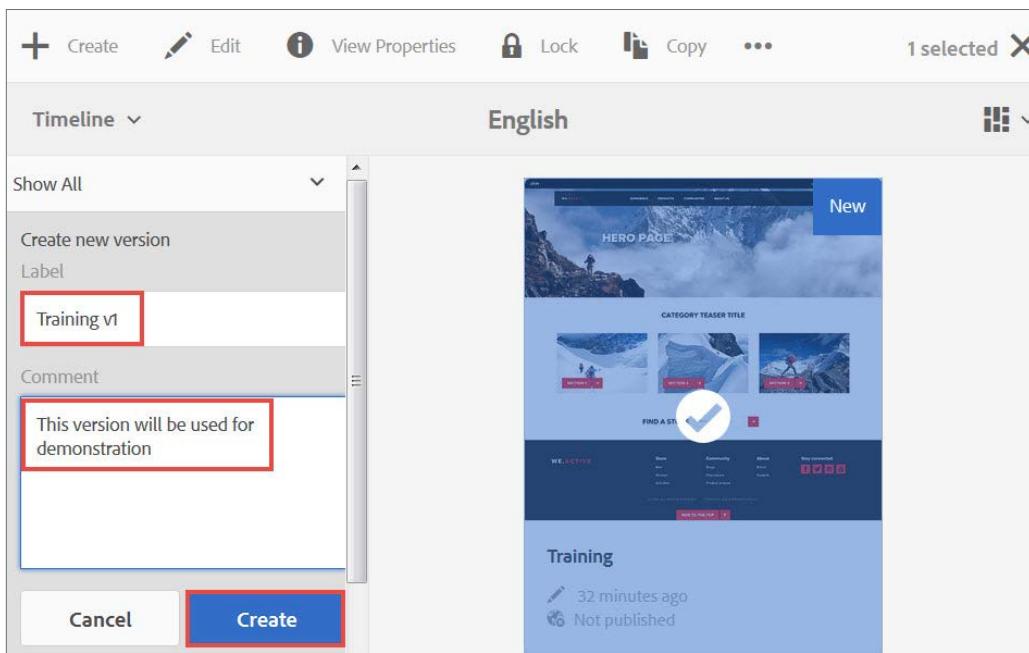
1. From the **Sites** console, navigate to the **We.Retail > United States > English > Training\_<username>**.
2. Select **Training\_<username>**, and then click **Timeline** from the left rail drop-down.

The screenshot shows the Adobe Experience Manager (AEM) Sites console. At the top, there are standard navigation buttons: Create, Edit, View Properties, Lock, Copy, and a selection indicator '1 selected'. Below these are dropdown menus for 'Content Only' and 'Timeline'. The 'Timeline' menu is highlighted with a red box. The main content area displays a 'New' page version and a 'LIVE COPY' page version. Both pages have a blue header with a mountain image, a central section with three images, and a dark footer with 'WE ACTIVE' branding. The 'New' page was published 32 minutes ago, while the 'LIVE COPY' was published 15 hours ago. Both versions are currently marked as 'Not published'.

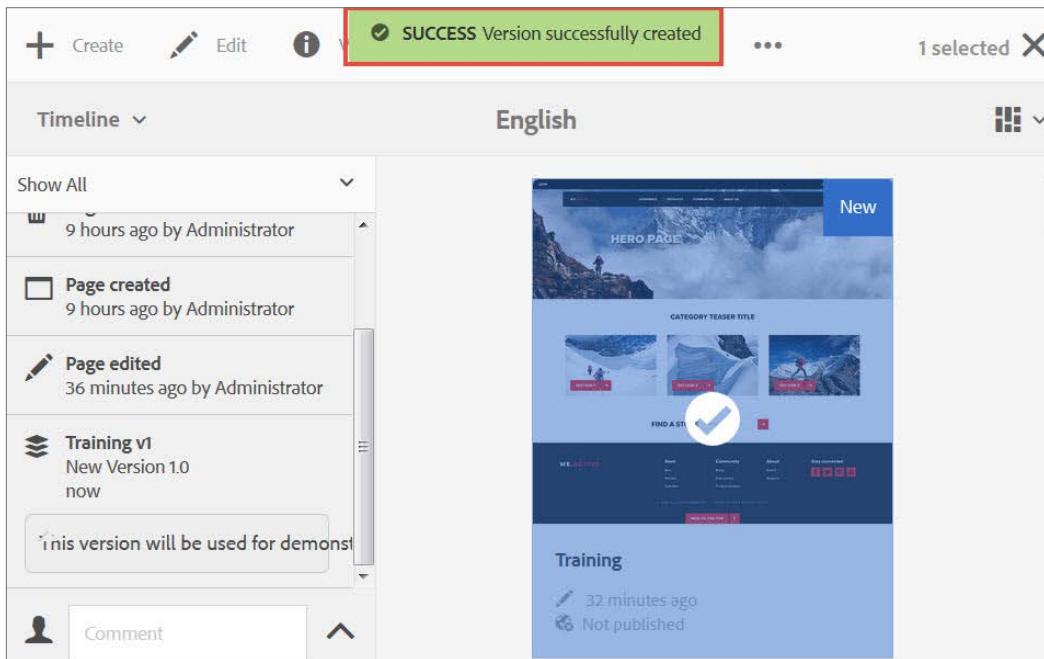
3. Click the arrowhead beside the **Comment** field to view the available options.
4. Select **Save as Version**.

This screenshot continues from the previous one, showing the 'Timeline' view for the 'Training' page. The timeline dropdown is open, and the 'Save as Version' option is highlighted with a red box and a red number '4'. Below the timeline, there's a 'Comment' field with a user icon and an upward arrow icon. The upward arrow icon is also highlighted with a red box and a red number '3'. The main panel shows the same two page versions as before: 'New' and 'LIVE COPY'.

5. You can also add a **Label** and **Comment** for this version, and then click **Create**.



A success message **Version successfully created** appears.



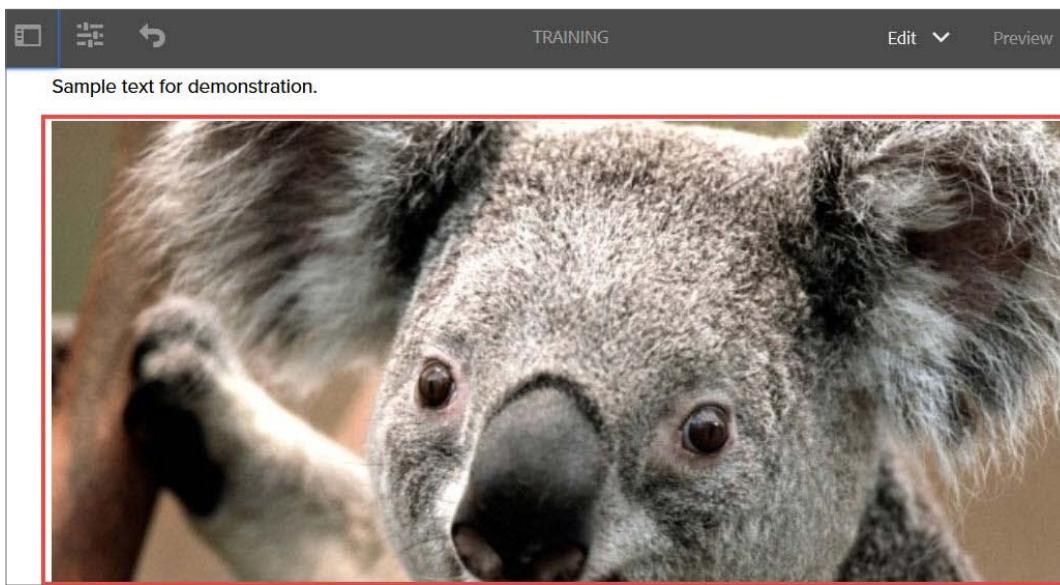
6. Open the **Training\_<username>** in **Edit** mode.
7. Drag and drop a new image onto the existing **Image** component from the **Assets** browser of the **Side Panel**.

The screenshot shows the AEM Edit mode interface. On the left is the Assets panel with search, path, and filter options. In the center, a page titled "Aloha spirits in Northern Norway" is displayed. A koala image is selected in the Assets panel, highlighted with a red border. The main content area shows the page's title and some placeholder text.

8. Perform Step 2-4 to create a new version 1.1 of the page.

The screenshot shows the AEM Timeline interface. The top navigation bar includes Create, Edit, View Properties, Lock, Copy, and a selection count of 1 selected. The main area displays a timeline of changes. A red box highlights the first change: "New Version 1.1 1 minute ago". Below it are other items: "Revert to this Version" and "Show Differences". Further down is another item: "Page edited 11 seconds ago by Administrator". At the bottom, there is a comment input field.

The **New Version 1.1** has the new image, which you just added to the page in Step 7.



9. Click **New Version 1.0** from **Timeline** panel; you can view two options:
  - a. Revert to this version
  - b. Show Differences
10. Click **Revert to this Version** to retain the previous version 1.0 and override the changes of current version 1.1.

A screenshot of the Adobe Experience Manager Timeline panel. The top bar includes buttons for "Create", "Edit", "View Properties", "Lock", "Copy", "Move", and a selection counter "1 selected X". The main area shows a timeline with three items:

- "3 minutes ago by Administrator": "Page deleted"
- "2 minutes ago": "New Version 1.0" (highlighted with a red box). This item has a dropdown menu with "Revert to this Version" and "Show Differences" options, both of which are also highlighted with red boxes.
- "1 day ago": "LIVE COPY Women" (status: Not published)

On the left, there are filters for "Show All" and "Timeline". On the right, there are "Find" and "Select" tools.

A success message **Version reverted** appears.

The screenshot shows the AEM interface with the following details:

- Top Bar:** Create, Edit, View Properties, SUCCESS Version reverted (highlighted with a red box), Move, ...
- Left Sidebar:** Timeline dropdown set to English, Show All, 17 minutes ago. It lists:
  - Page edited 15 minutes ago by Administrator
  - New Version 1.2 15 minutes ago
  - Page restored 1 second ago by Administrator
  - Page edited 1 second ago by Administrator
- Right Side:** Comparison of two versions of a page titled "Training".
  - New:** Shows a blue header with "HERO PAGE" and three category teasers. A large checkmark icon is overlaid on the center of the page.
  - LIVE COPY:** Shows a dark header with "HERO PAGE" and three category teasers.
- Bottom:** Comment section with a user icon and a "Comment" button.

11. Open the **Training\_<username>**, you will see the old image of previous version 1.0.

The screenshot shows the AEM interface with the following details:

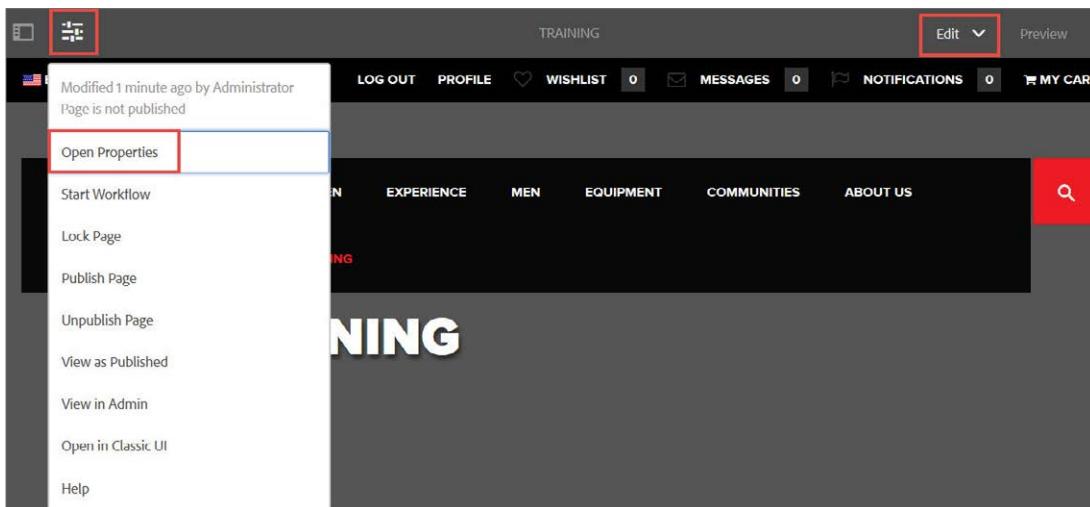
- Top Bar:** Edit, Preview
- Page Content:** TRAINING. It contains:
  - Sample text for demonstration.
  - A large image of a blue polo shirt, which is highlighted with a red border.



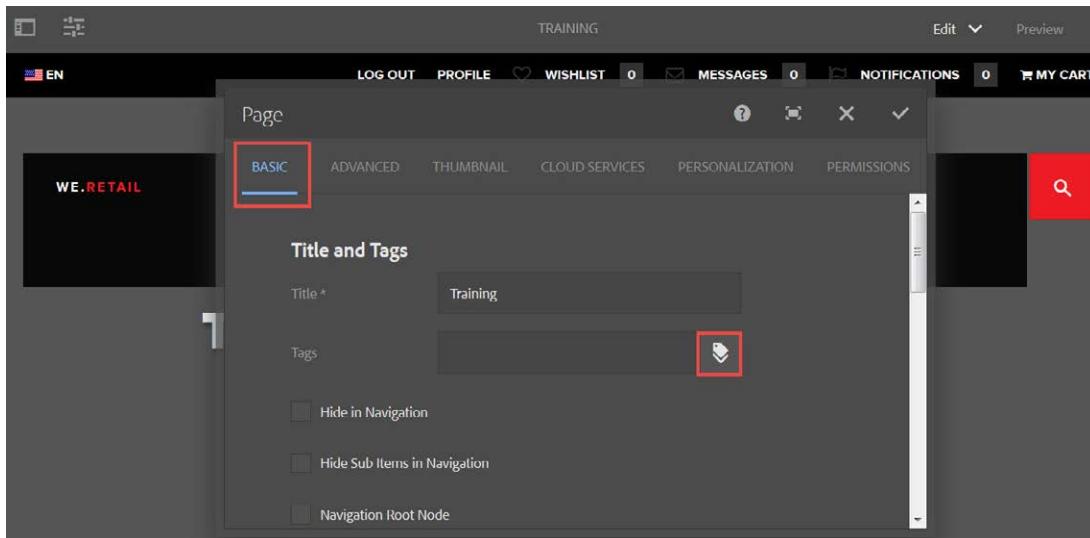
## Task 7: Add tags to a page, search based on a tag and save searches

To add tags to a page:

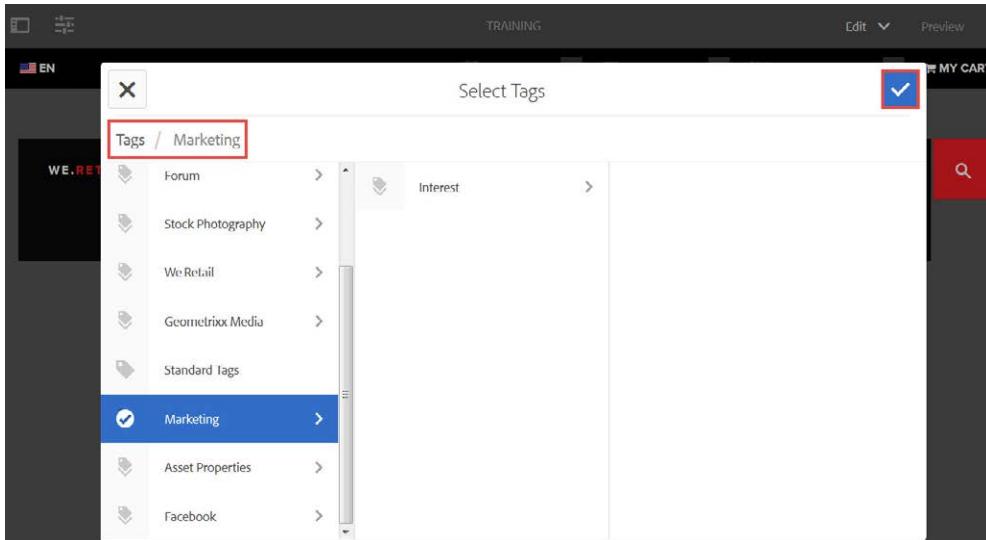
1. Open a page in **Edit** mode to add tags (for example, Training\_<username>).
2. Click **Page Information** icon from the toolbar, and then select **Open Properties** from the drop-down.



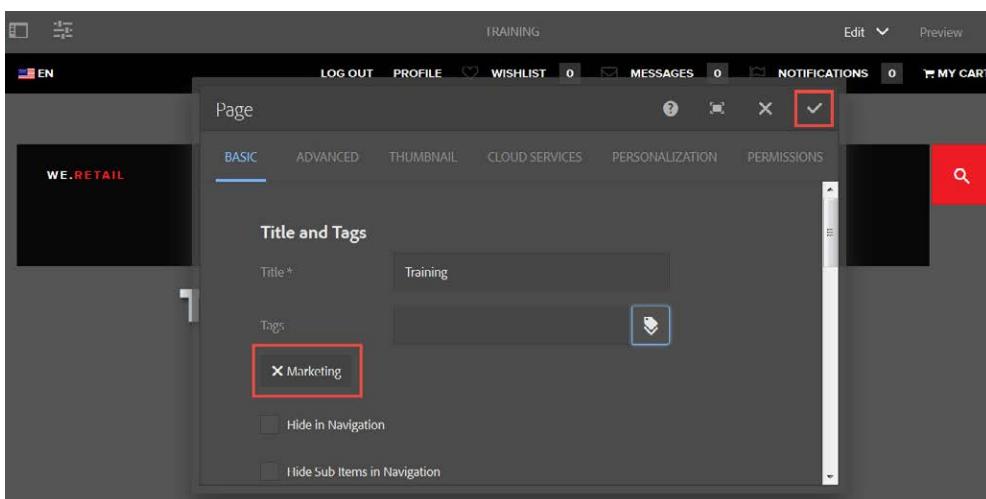
3. From the **BASIC** tab, add tags by clicking **Browse**.



4. In **Select Tags** dialog box, add **Marketing** tag, and then click **Confirm** (checkmark) in the top-right corner.

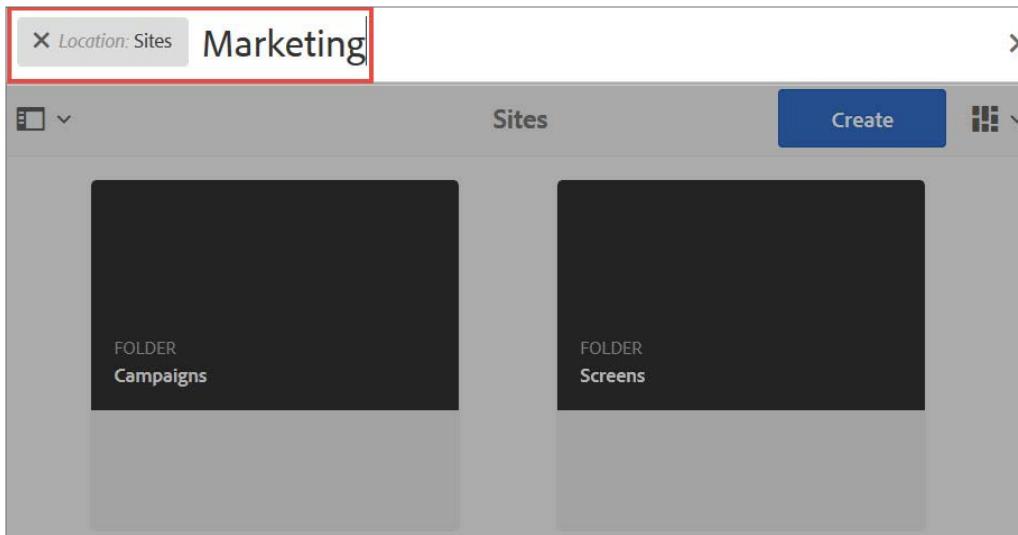


5. Click **Done** (checkmark) in the **Page** dialog box. The page refreshes. Open the page properties again, and notice the newly added **Marketing** tag.

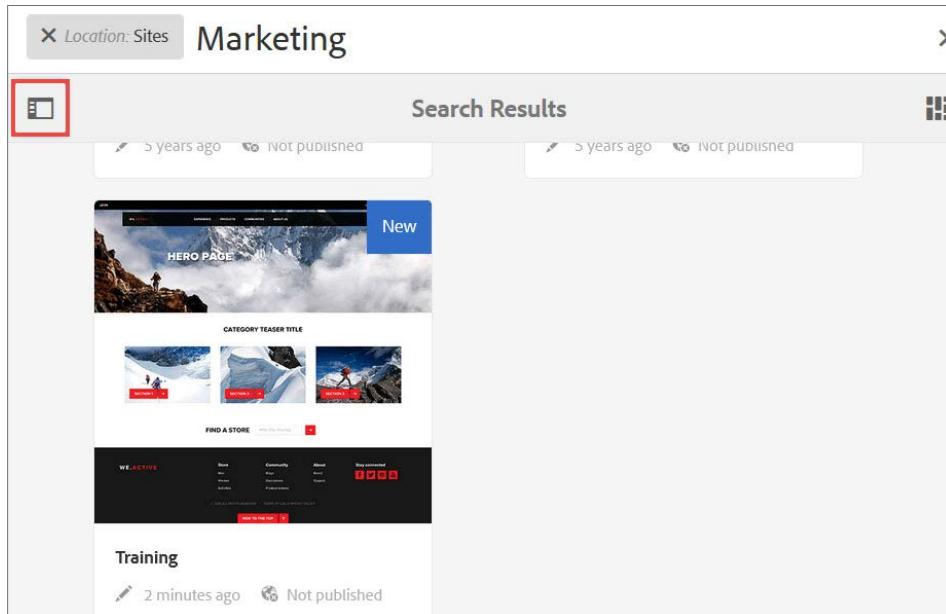


To search and save the search result:

1. From the **Sites** console, click **Search** from the actions bar, and then enter **Marketing**.



The pages that have Marketing as a word, tag, and so on will display. You can also see the **Training\_<username>** page for which you added Marketing tag in the previous step. You can save this search result to use it in the future, which helps with quick retrieval.



2. Click left rail icon, Filter & Options panel opens up, and then click **Save**.

The screenshot shows the 'Marketing' search results page. On the left, the 'Filters & Options' panel is open, displaying sections for 'Saved Searches', 'Select Search Directory', 'Select Tag(s)', and filter criteria for 'Modified Date', 'Publish Status', and 'LiveCopy Status'. At the bottom of this panel are 'Cancel' and 'Save' buttons, with the 'Save' button being highlighted by a red box. The main 'Search Results' area shows two items: a 'New' item titled 'HERO PAGE' and a 'Training' item. Each item has a preview thumbnail, a title, a timestamp, and a status indicator.

3. Name the filter (for example, **Marketing\_Tag\_Result**) in the **Name** field. The filter gets added to the **Saved Searches** list.

This screenshot shows the 'Filters & Options' panel with the 'Name' field populated with the value 'Marketing\_Tag\_Result'. The 'Save' button at the bottom of the panel is highlighted with a red box. The rest of the interface is identical to the previous screenshot, showing the 'Marketing' search results with the same two items: 'HERO PAGE' and 'Training'.

A success **Saved Search Created** dialog with the message **Marketing\_Tag\_Result was also added to your saved searches list** appears.

The screenshot shows the 'Marketing' search interface. On the left, there's a sidebar with 'Filters & Options' containing a dropdown set to 'Marketing\_Tag\_Result'. Below it are 'Select Search Directory' and 'Select Tag(s)'. Under 'Search Results', there's a preview of a page titled 'Geometrixx' with a 'CONTENT' section. A red box highlights a modal dialog in the center that says 'Saved Search Created' with a green checkmark icon. Below the message, it says 'Marketing\_Tag\_Result was also added to your saved searches list.' At the bottom of the dialog is a close button ('X').

You can edit the saved search to add more filters or delete the saved search.

This screenshot shows the 'Marketing' search interface with a red box around the 'Edit Saved Search' button in the sidebar. The main search results show a single item: a 'HERO PAGE' with a 'New' tag and a '5 years ago' timestamp. In the bottom right corner of the main window, there's another smaller 'Marketing' search interface window. This smaller window also has a red box around the 'Edit Saved Search' button. It shows a 'Filters & Options' sidebar with 'Marketing\_Tag\_Result' selected. The 'Search Results' section displays the same 'HERO PAGE' item. A 'Save' dialog is open in the foreground, prompting the user to enter a name for the saved search. The 'Name' field contains 'Marketing\_Tag\_Result'. At the bottom of the dialog are 'Cancel' and 'Save' buttons, with 'Save' being highlighted in blue.



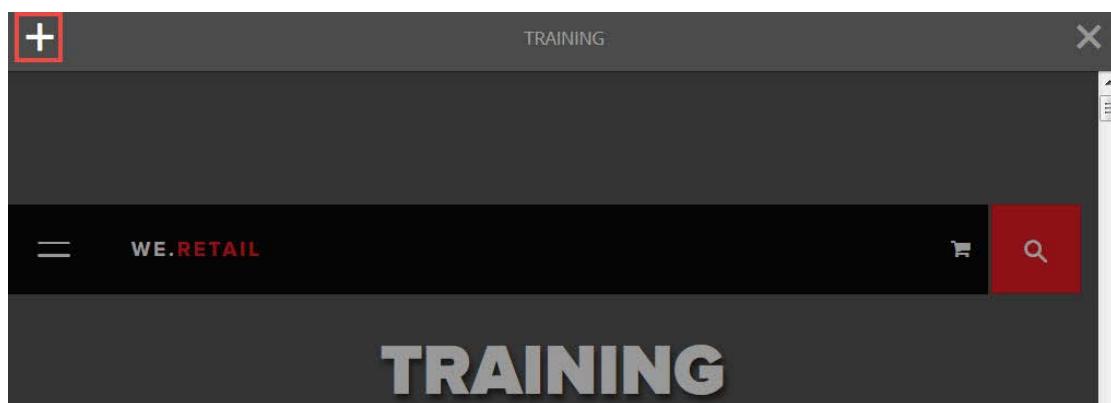
## Task 8: Add annotations to a page

To add annotations to a page:

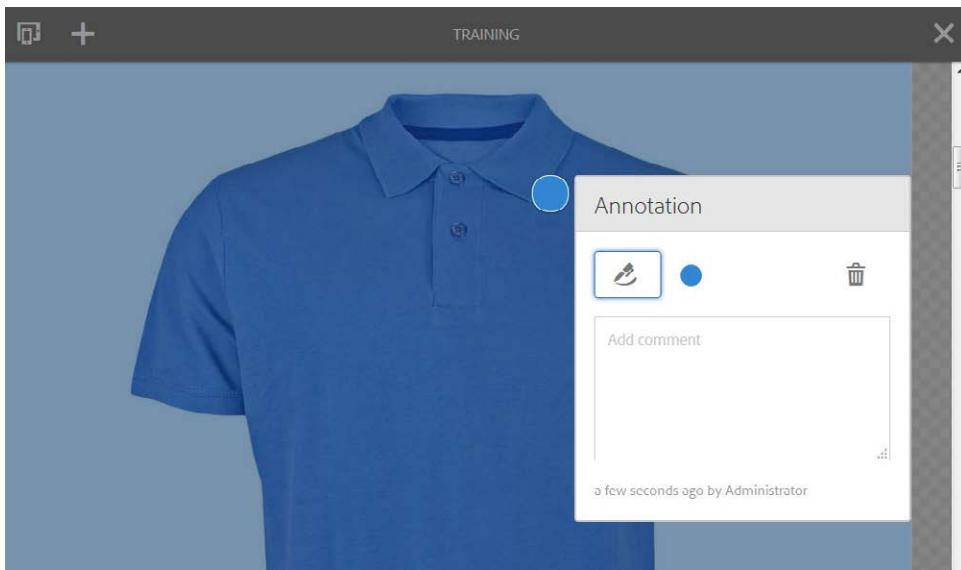
1. Open the page you want to add annotations to (for example, **Training\_<username>**).
2. Click **Annotate** in the page toolbar to enter the annotation mode.



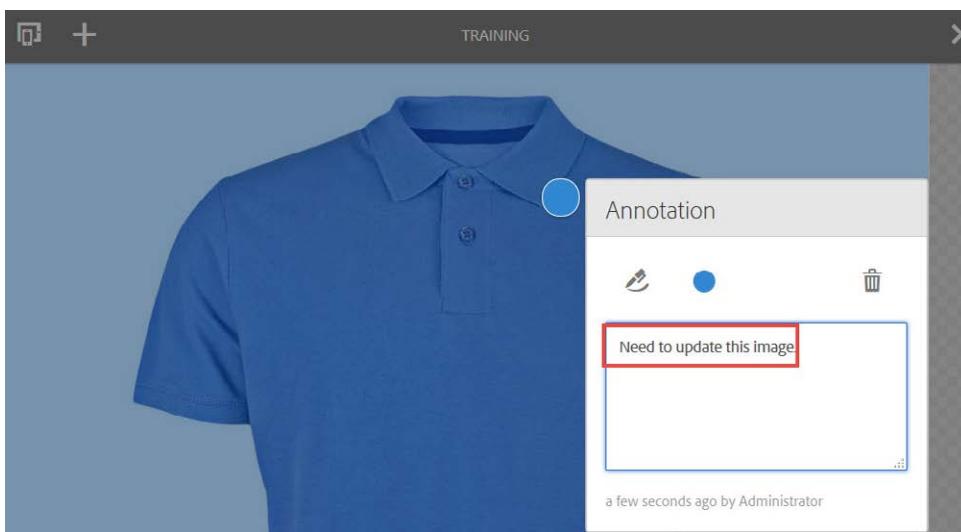
3. Click **Add annotation** (the plus icon) from the top-left corner to annotate a component.



4. Select a component you want to annotate. The **Annotation** dialog box appears.



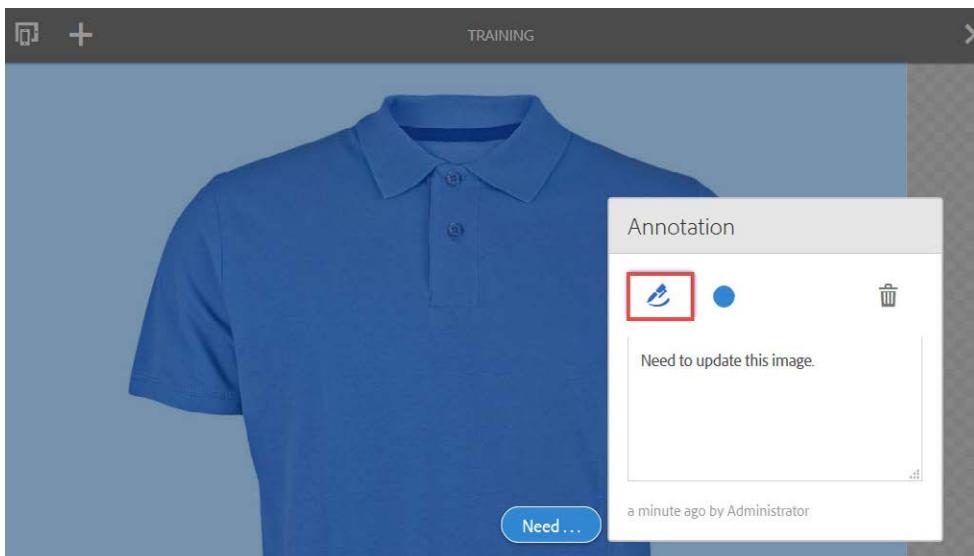
5. The **Annotation** dialog box allows you to:
- Add a comment**—Questions or comments for the author.



After adding comments, click anywhere on the page to minimize the dialog box-- an oval-shaped button with the first few letters of the comment. If you click the oval button, the dialog box maximizes.



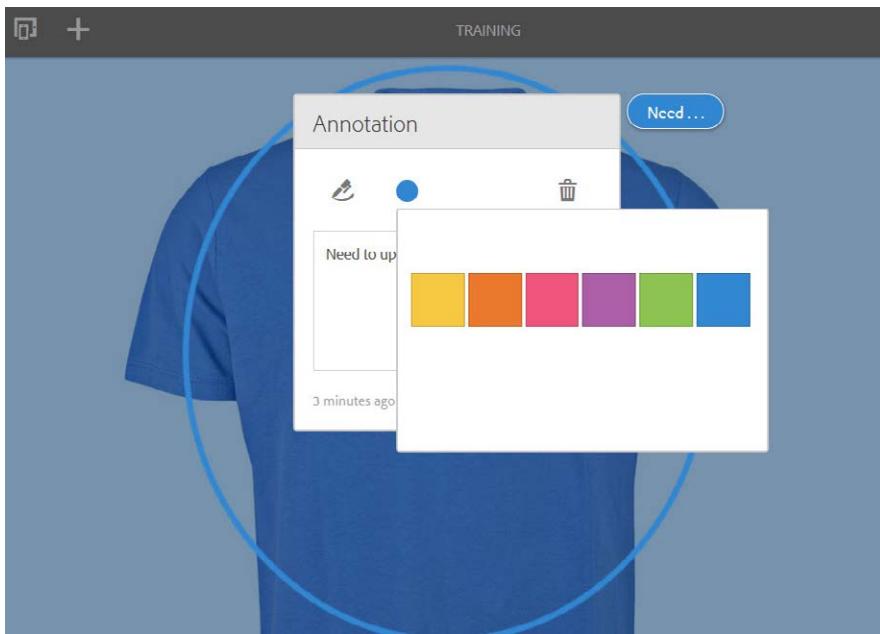
b. **Add sketch:** To highlight or add line graphics to the page.



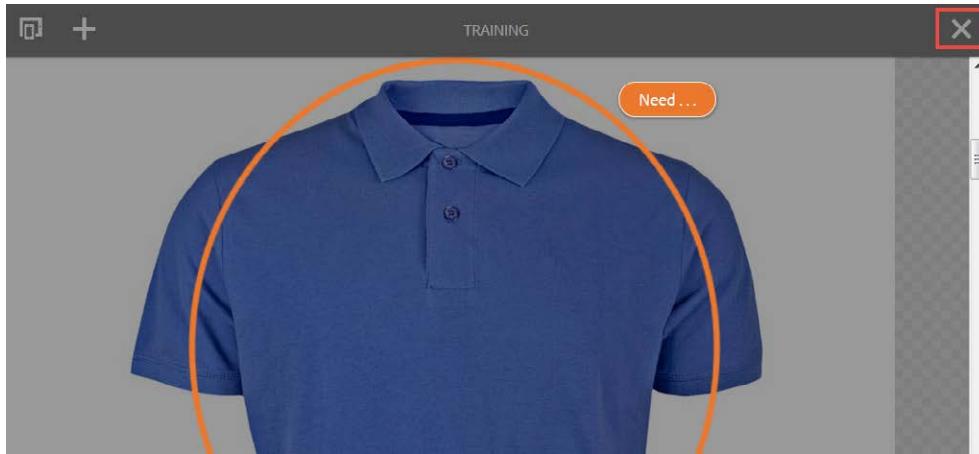
Using **Add sketch**, you can draw an arrow or highlight objects using oval or circular shapes.



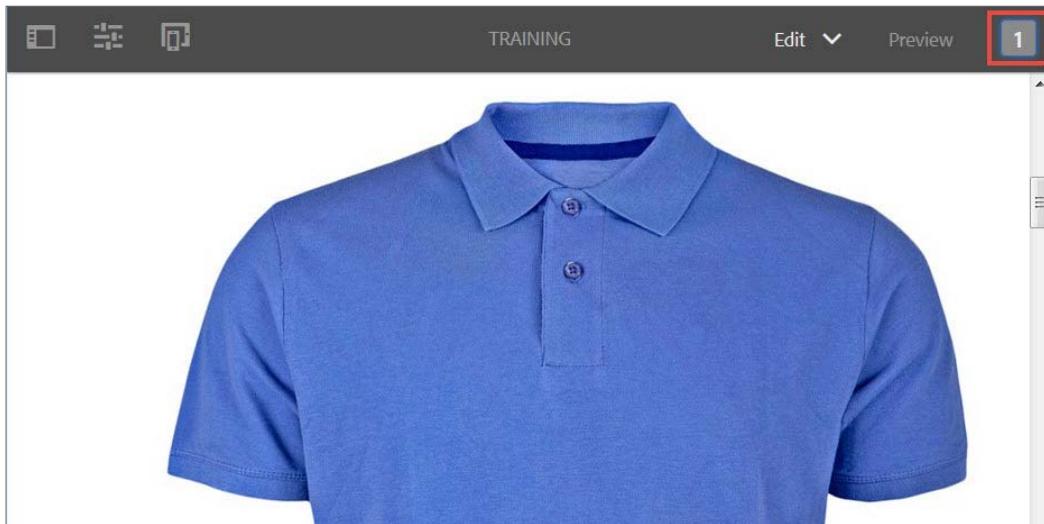
6. You have an option to change the color (for example, click orange color) of the annotations using the circular icon from the **Annotation** dialog box.



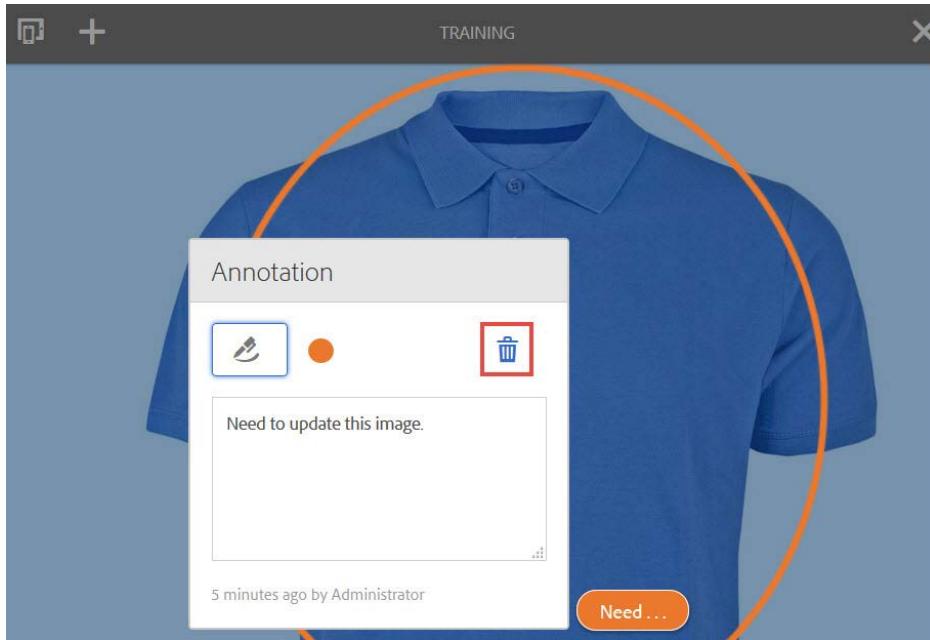
7. Click close (X) from the top-right corner to exit from the **Annotate** mode.



8. To view annotations on a page, click **Annotate** (which gives the count of annotations added to a page), and take action on the component of the page, which is annotated.



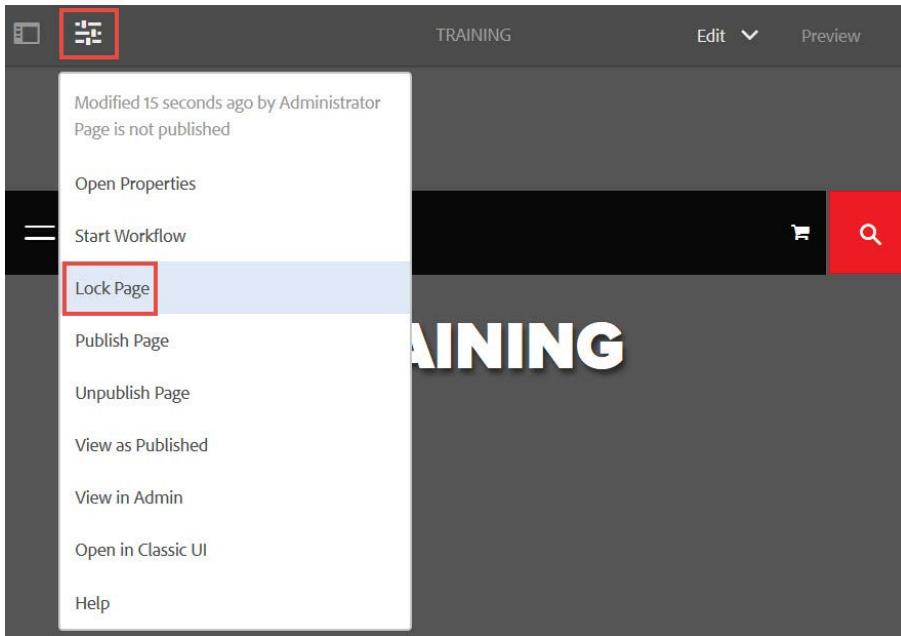
9. To delete annotations on a page, click **Delete annotation** (garbage can icon) from the **Annotation** dialog box. The selected annotation will be deleted from the page.



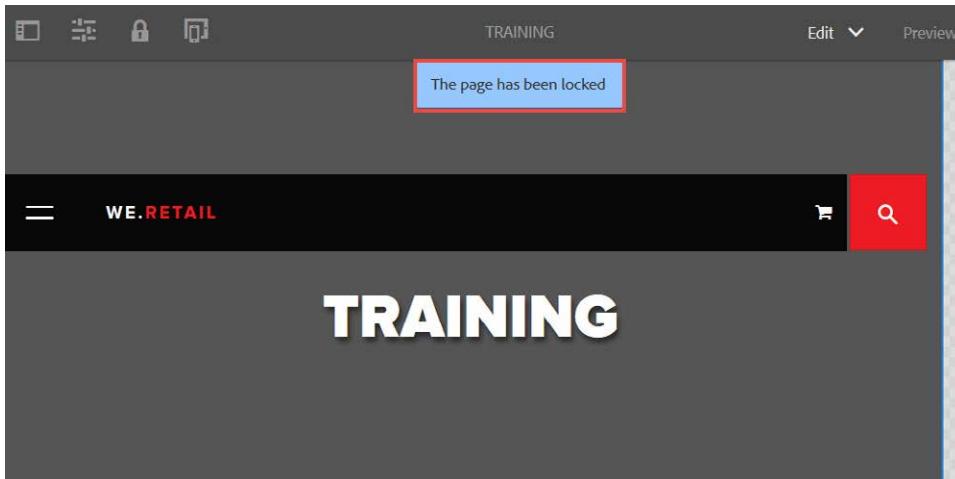
## Task 9: Lock and unlock a page

To lock a page:

1. Open the page you want to lock (for example, **Training\_<username>**).
2. Click **Page Information** icon from the page toolbar, and then select **Lock Page** from the drop-down.



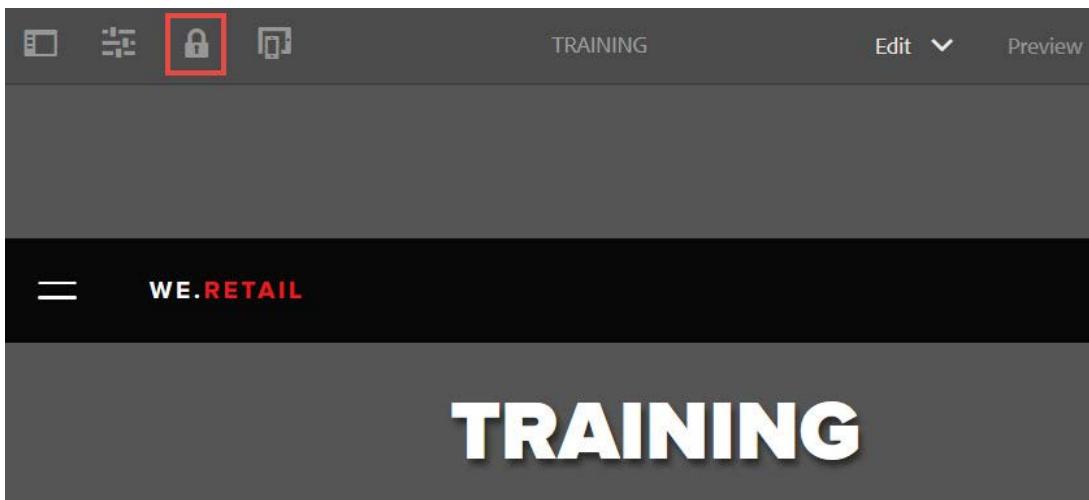
**The page has been locked** message appears, indicating that you successfully locked the page.



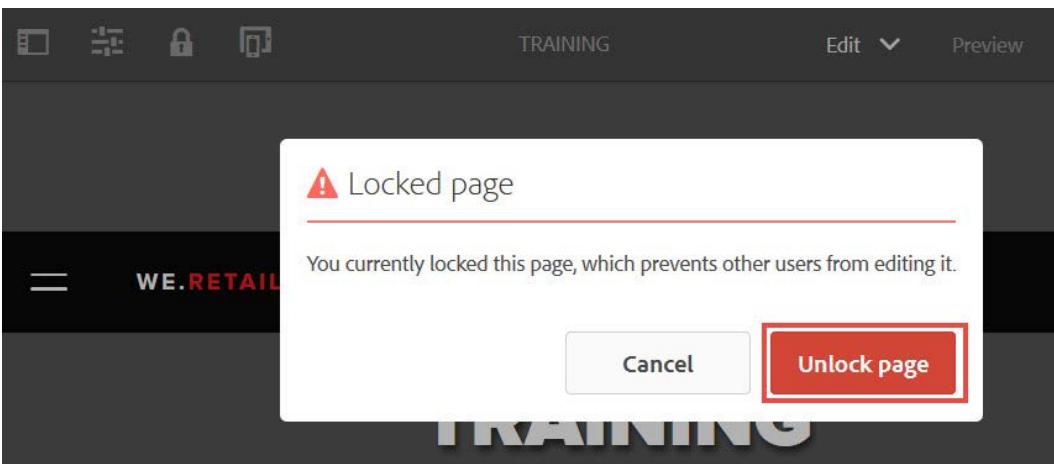
Once the page is locked, other users will not be able to edit this page. The users with administrator access and impersonation rights can unlock the page.

To unlock a page:

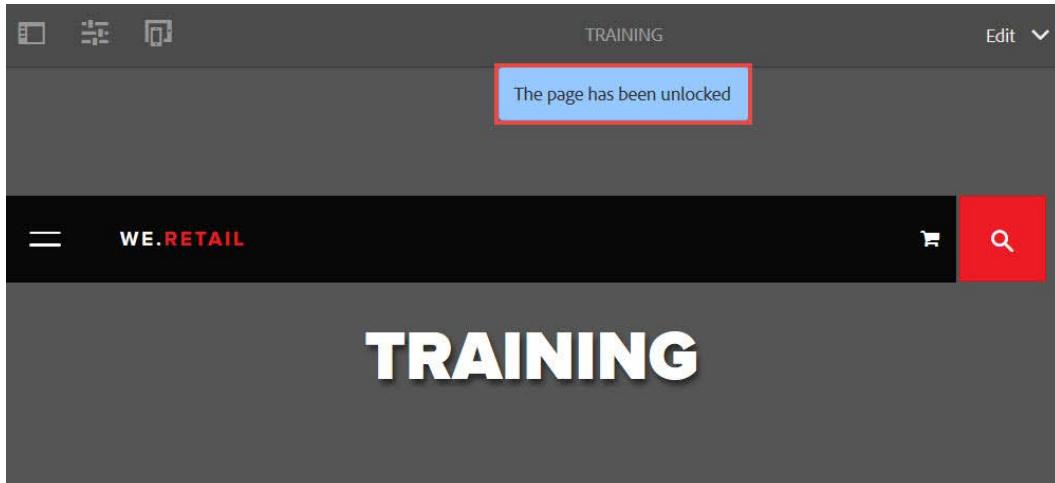
1. Open the page that is locked (for example, **Training\_<username>**).
2. Click **Locked page** icon from the page toolbar.



3. Click **Unlock page** from the **Locked page** dialog box.



The page has been unlocked message appears indicating you successfully unlocked the page, and now any user can now access the page.

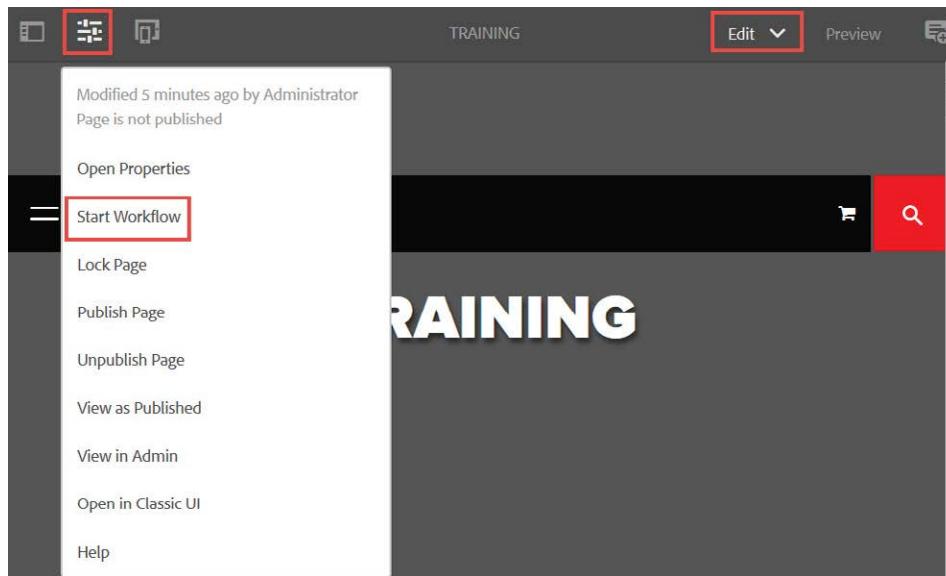




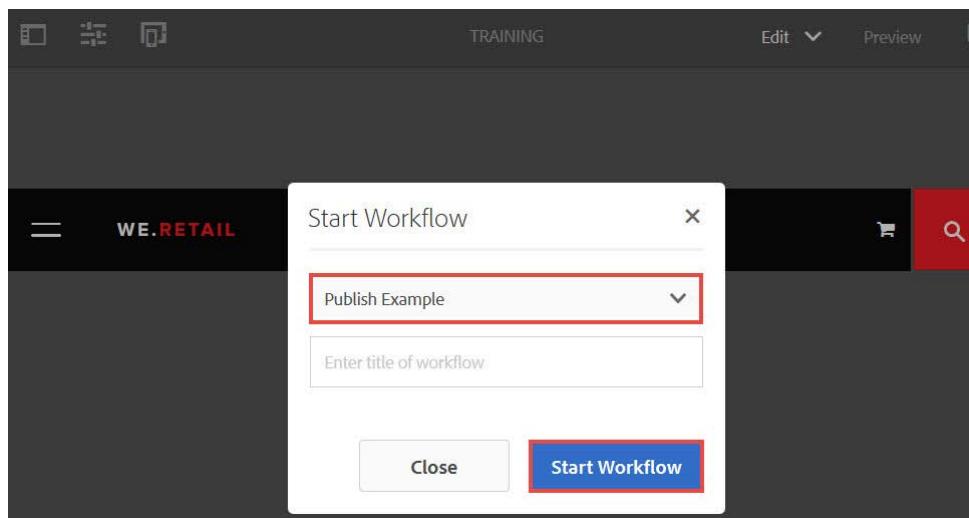
## Task 10: Use a workflow to automate the page publishing process

To start and complete the workflow steps for automating Publish process are:

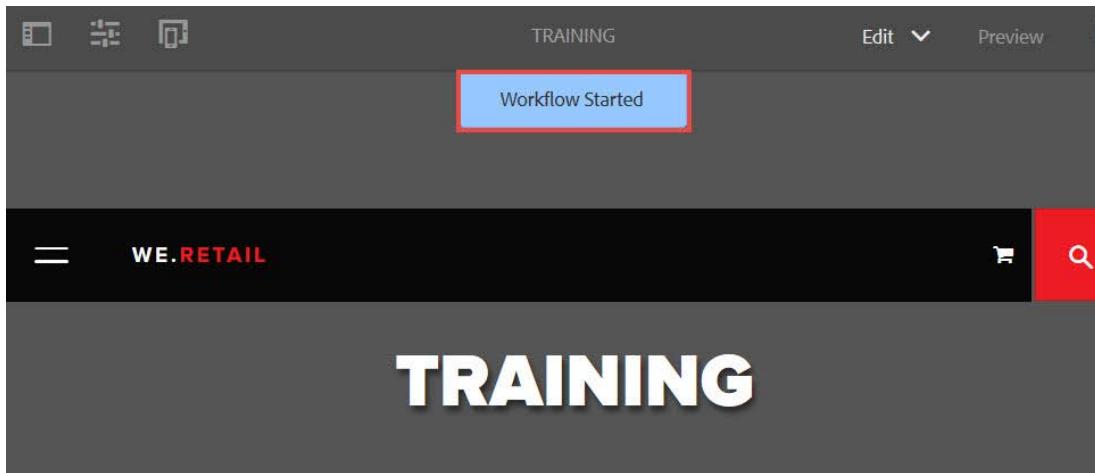
1. Open the **Training\_<username>**.
2. Click the **Page Information** icon from the page toolbar, and then select **Start Workflow** from the drop-down. The **Start Workflow** dialog box opens.



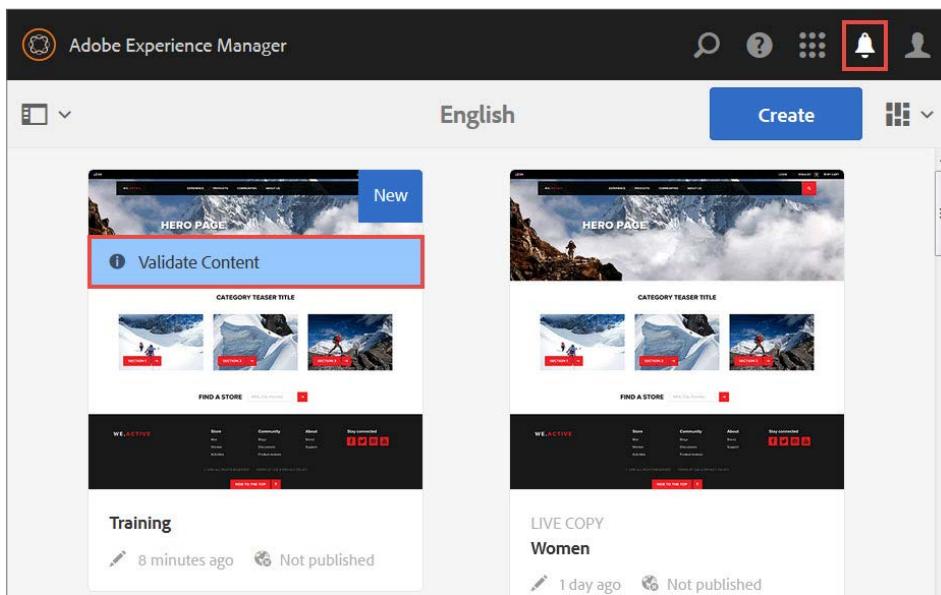
3. In the **Start Workflow** dialog box, select **Publish Example** model from **Select a Workflow Model** drop-down. You can also add a title for the workflow in **Enter title of workflow** field.
4. Click **Start Workflow**.



The **Workflow Started** message appears.



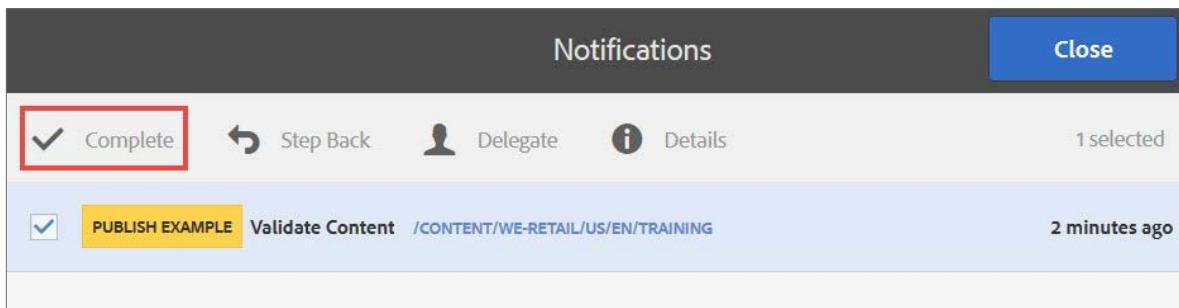
5. Navigate to the **Sites** console, click the **Notification** icon from the header bar. The **Notifications** screen appears with steps.



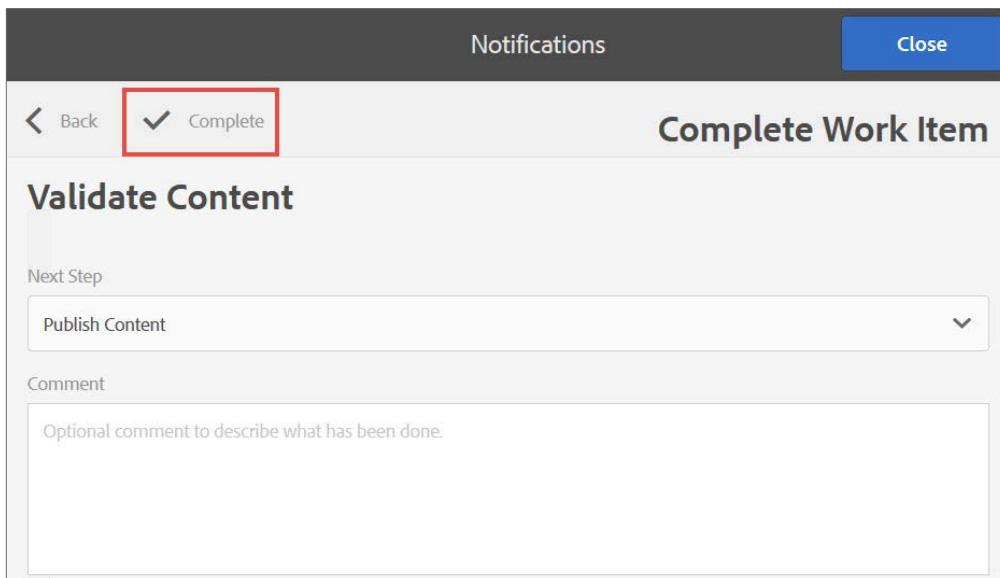
The **Publish Example** model has two steps:

- a. Validate Content – to validate the modified content.
- b. Publish Content – to publish the modified content.

6. Select **VALIDATE CONTENT** by clicking the corresponding checkbox. You can perform the following actions on the selected workflow item:
- Complete—to complete the workflow item.
  - Step Back—to go one step back in the workflow.
  - Delegate—to delegate the workflow item to another user or group.
  - Details—to display the workflow details such as Content Title, Start Time, and Description.

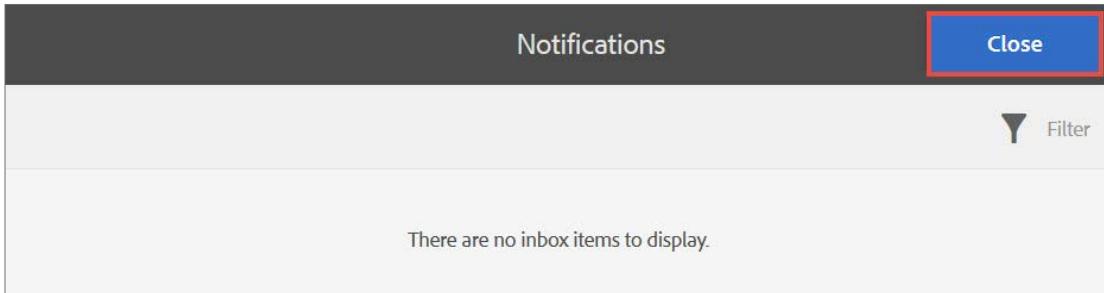


7. Click **Complete**. The workflow will direct to next step **Publish Content**, which publishes the page.

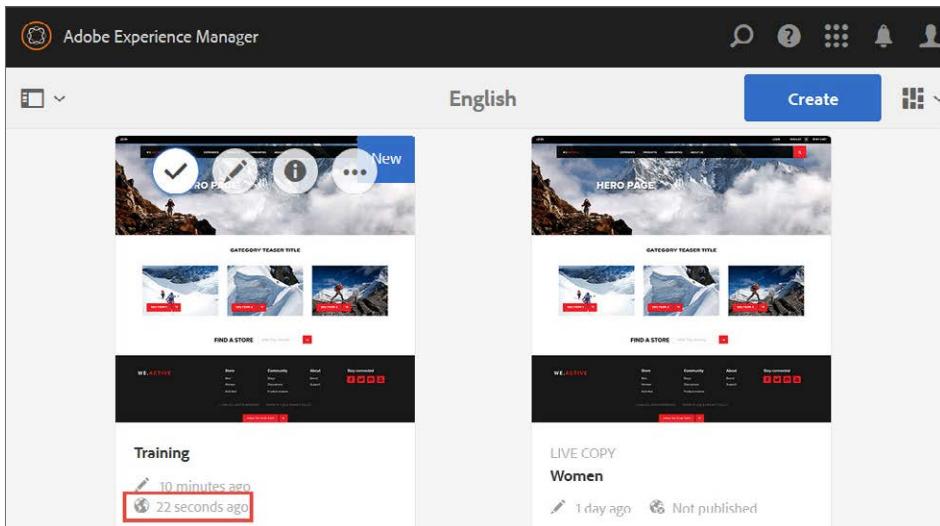


You will see the There are no inbox items to display message, as there are no more workflow items.

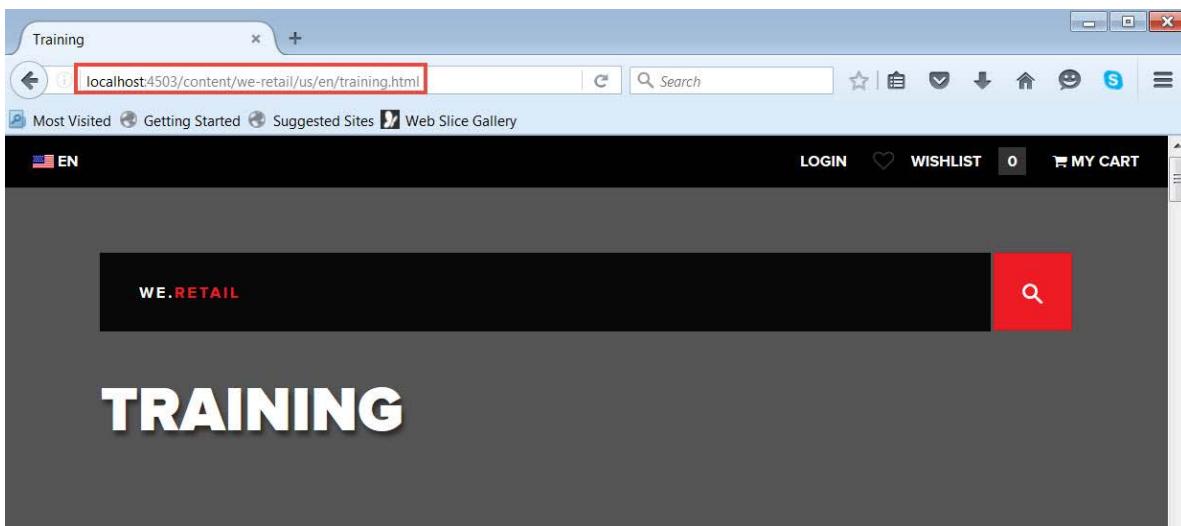
8. Click **Close** in the **Notifications** screen to take you back to the **Sites** console.



9. Navigate to **We.Retail > United States > English**, hover over **Training\_<username>**, you will see published **22 seconds ago**.



You can now view **Training\_<username>** page on your Publish instance.



## Scenario Conclusion

By performing these tasks, you:

- Creating a distinct visual and user experience in Adobe Experience Manager without being limited to select few web page designs.
- Creating responsive web pages, which works on all device screen sizes, without compromising on readability and content flow.
- Editing properties of multiple pages to add common values to all the selected pages.
- Creating folders and uploading various assets and content fragments, and using them in web pages.
- Reorganizing the pages within the site structure through various page options available in Adobe Experience Manager.
- Creating page versions to retain the existing content value.
- Adding tags to pages and saving search results to display the right content to the visitor.
- Adding annotations to subject the content of web pages to discussion with other team members prior to publishing the content.
- Locking pages to restrict other authors from editing the created content.
- Starting a workflow to automate different processes.

## Summary

You should now be able to:

- Define key terminologies used in Adobe Experience Manager
- Create pages from templates
- Add various components to a page
- Author responsive pages
- Define various page properties
- Edit page properties
- Organize and manage assets
- Use content fragments in a page
- Illustrate various options used in reorganizing the site structure
- Use various page options to preserve and increase the content value
- Explain various ways of collaborating in Adobe Experience Manager

## Chapter Three

# Advanced Authoring Skills

## Overview

This module lets you discover and use the special authoring features of Adobe Experience Manager, such as creating, editing, and using the workflows to automate business processes. In addition, this module includes creating and managing launches for future content releases, and creating namespaces and managing tags to enhance the search results.

## Objectives

By the end of this chapter, you will

- Define the Template Editor
- Create and use editable templates in pages
- Explore the Design mode of pages
- Create and use Content Fragments in pages
- Define workflows
- List the interface elements of Workflow console
- Create and use a workflow to automate business processes
- Define launches
- Create and promote launches
- Create and promote nested launches
- List the interface elements of Projects console
- Create and manage projects
- List the interface elements of Tagging console
- Create and add tags to a namespace
- List the reasons to use tags in pages

# Creating and Managing Templates

---

When creating a page you need to select a template; this will be used as the basis for creating the new page. The template defines the structure of the resultant page, any initial content and the components that can be used (design properties).

With the template editor, creating and maintaining templates is no longer a developer-only task. A power-author can be involved, too. Developers are still required to set up the environment, create client libraries, and create the components to be used. However, once these basics are in place, the author has the flexibility to create and configure templates without a development project or iteration.

## Starting Points

Creating a new template requires collaboration; for this reason, the Role is indicated for each task. Depending on how your instance is configured, it might be useful to be aware that Adobe Experience Manager now provides two basic types of template. This does not impact how you actually use a template to create a page, but it does impact the type of template you can create and how a resultant page relates to its template.

Let's look at the following:

- Roles
- Editable versus Static Templates

## Roles

Creating a new template (using the Templates console and the template editor) requires collaboration between:

- Admin:
  - › Creates a new folder for templates requires admin rights.
- Developer:
  - › Focuses on the technical/internal details; needs development environment experience.
  - › Provides the template author with some required information.
- Template Author:
  - › Specific authors that are members of the group `template-authors`, this allocates the required privileges and permissions.
  - › Can configure the use of components and other high level details. Needs:

- » Experience with some technical details; for example, using patterns when defining paths.
- » Technical information - from the developer.

Due to the nature of some tasks (such as creating a folder), a development environment is needed, and this requires knowledge/experience.

## Template Types

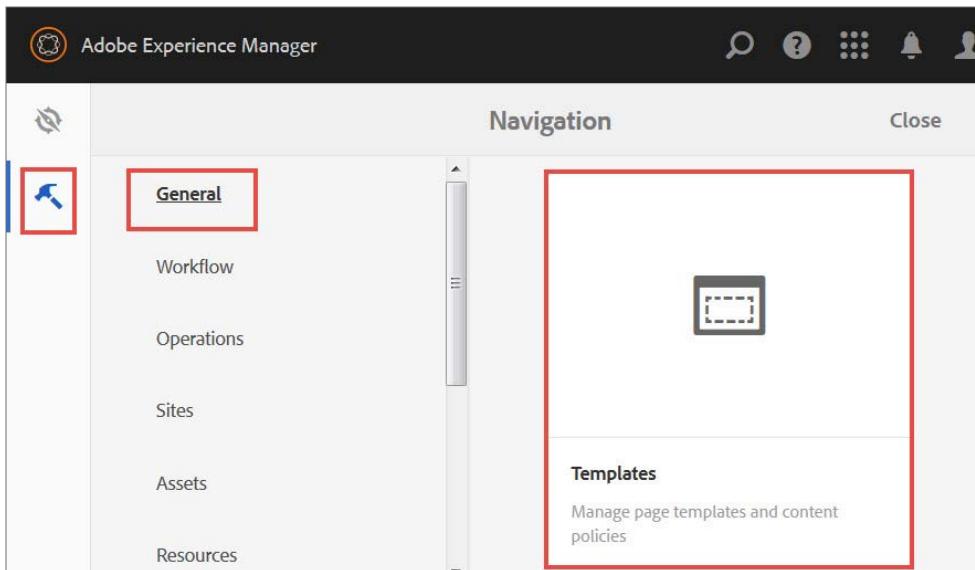
Adobe Experience Manager now offers two basic types of templates:

1. Editable Templates
2. Static Templates

Editable Templates	Static Templates
Created and edited by template authors	Defined and configured by developers
Allow you to define the structure, initial content, and content policies for pages	Have the same structure as the page. Use <b>Design</b> mode to persist design properties
Maintain a dynamic connection between the template and the pages	No dynamic connection with the page

## Templates Console

The Templates console is available from **Tools > General** section.



The Templates console allows your (template) authors to:

- Create a new template (either new or by copying an existing template).
- Manage the template lifecycle.

The screenshot shows the 'Templates' section of the AEM interface. At the top, there are buttons for 'Edit', 'View Properties', 'Disable', 'Publish', 'Copy', and a 'Create' button. Below this, a search bar contains the text 'We.Retail'. Under the heading 'Templates', there are two items listed: 'WE.RETAIL EMPTY PAGE - Experience Page' and 'WE.RETAIL EMPTY PAGE - Hero Page'. Both items have a green 'Enabled' status indicator. The 'Experience Page' item has a small preview image of a snowy mountain scene. The 'Hero Page' item also has a preview image of a snowy mountain scene. At the bottom of each item, there are edit and publish status icons.

## Template Editor

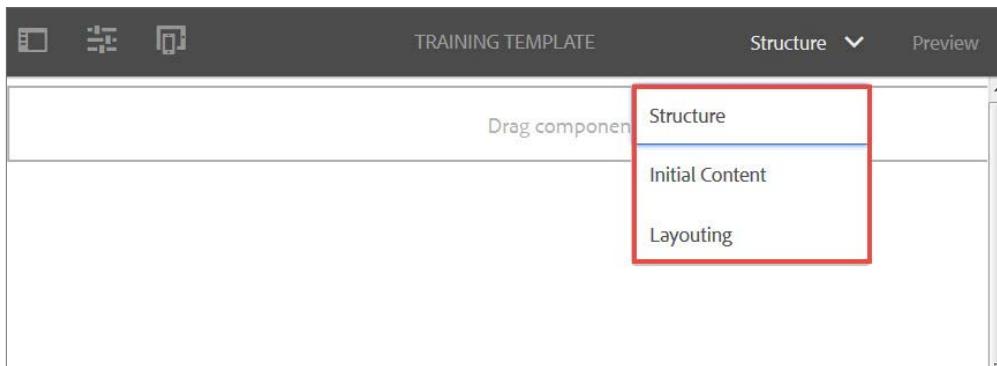
The template editor is available, allows your (template) authors to:

- Add (available) components to the template and position them on a responsive grid.
- Pre-configure the components.
- Define which components can be edited on the resultant pages (created from the template).
- Compose templates out of available components
- Position the components of the template on a responsive grid
- Define how resultant pages created from the templates can be edited
- Pre-configure the editable components
- Manage the lifecycle of the templates

## Modes of Template Editor

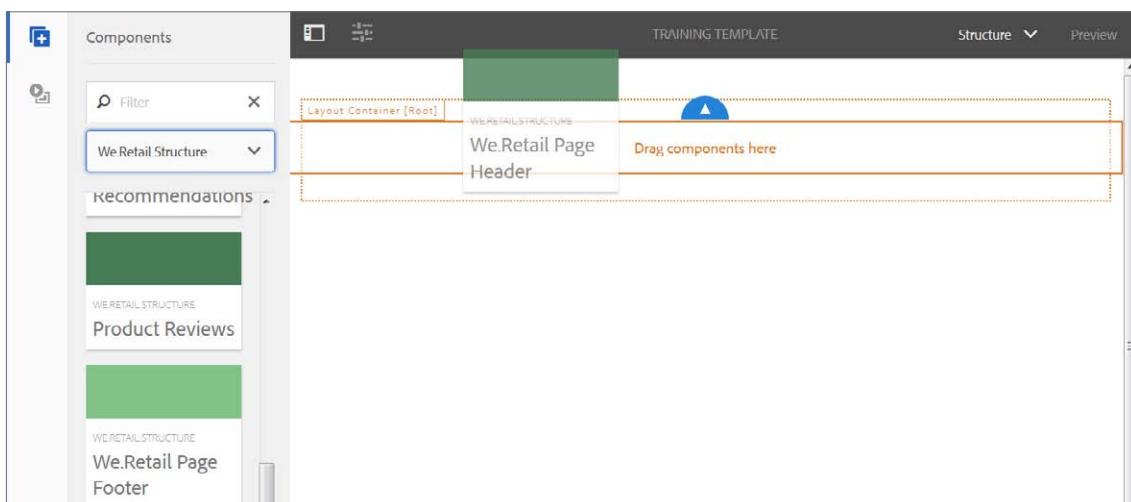
The Template Editor has the following three modes:

1. Structure
2. Initial Content
3. Layouting



### Structure

- Components added here cannot be moved/removed from resultant pages by the page authors. If you want page authors to be able to add and remove components to resultant pages, then you need to add a paragraph system to the template.
- When components are locked, you can add content; however, page authors cannot edit the components. You can unlock components to allow you to define Initial Content.



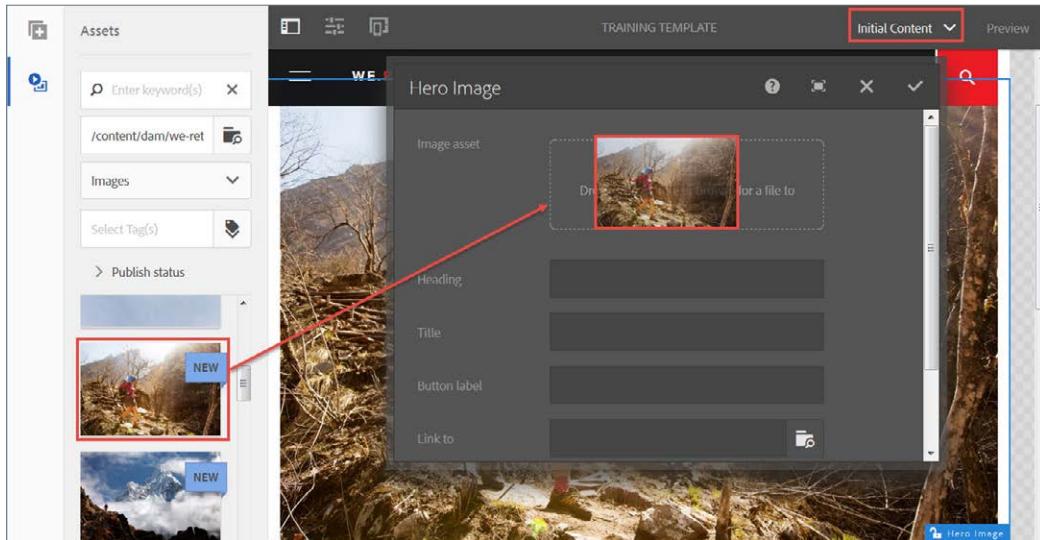

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 NOTE: In structure mode, any components that are the parent of an unlocked component cannot be moved, cut, or deleted.

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## Initial Content

When a component has been unlocked, you can define the initial content that will be copied to the resultant page(s), created from the template. You can edit these unlocked components on the resultant page(s).



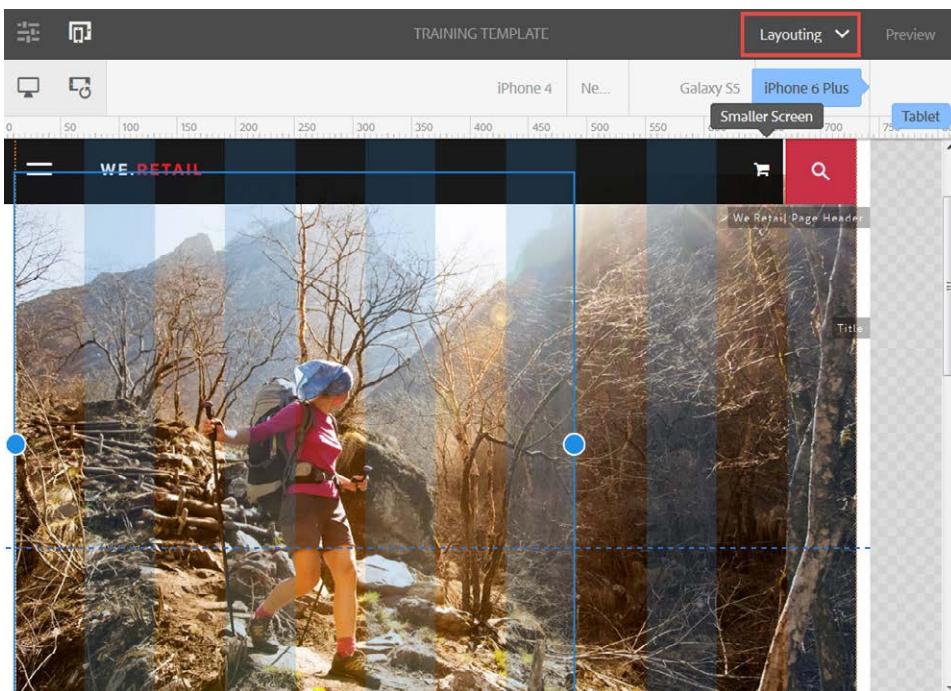

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 NOTE: In the initial content mode (and on the resultant pages), you can delete any unlocked components that have an accessible parent (for example, components within a layout container).

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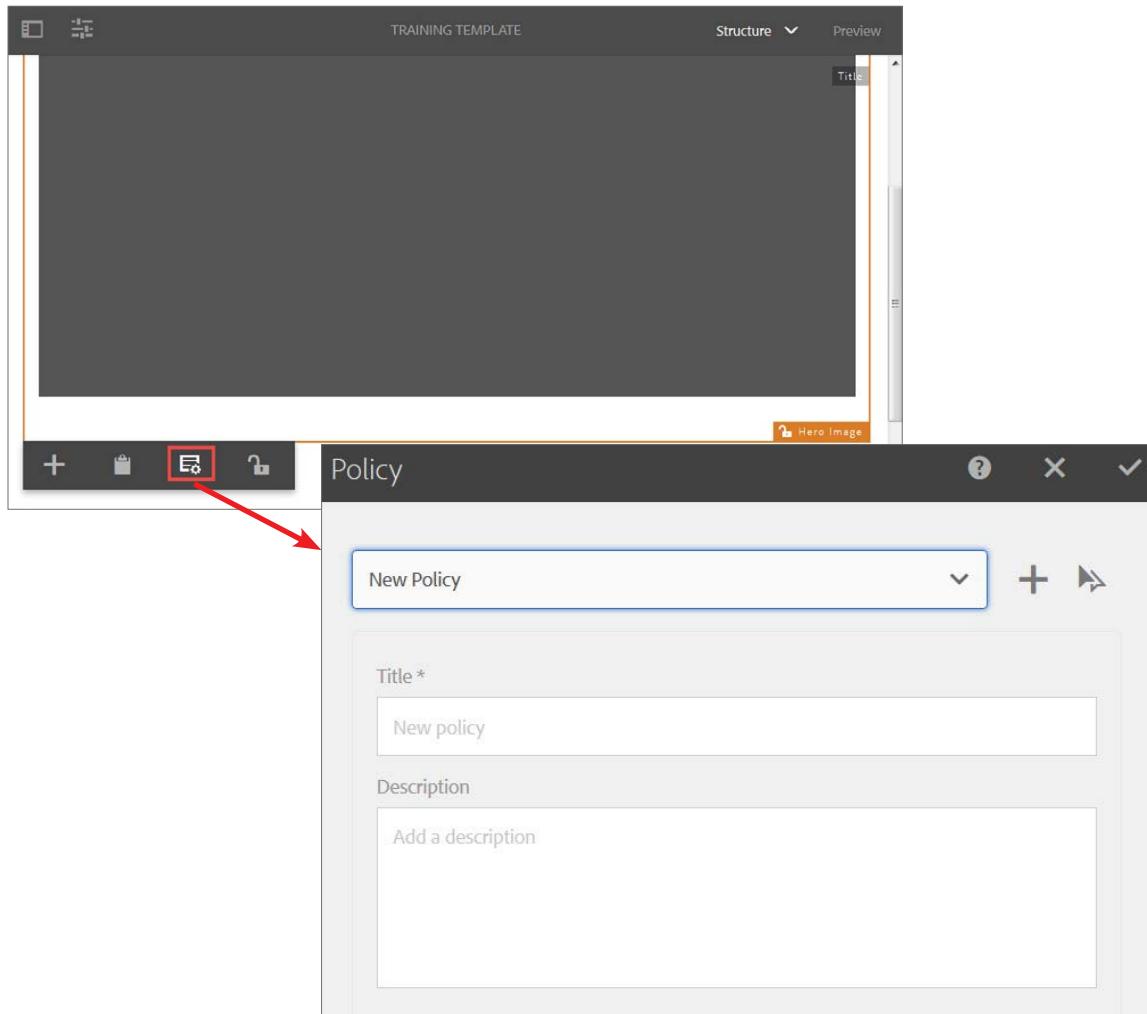
## Layouting

Here you can predefine the template layout for the required device formats.



## Content Policies

- Are used to connect the predefined page policies to a page. These page policies define the various design configurations.
- Some components come with a design configuration that allows you to preconfigure its behavior on the resultant page. The content policies allow you to assign such a configuration to the selected component.



## Creating a New Editable Template

Steps to create a new editable template are:

1. Navigate to **Templates** console; from **General > Tools > Templates**.
2. If necessary, create a folder for the templates
3. Create a new template (empty at this stage) by clicking **Create**.
4. Select the template type then click **Next**. When you first create the template, the template will have **Draft** written in the upper-right.
5. If this is the first time you are creating a template, a tutorial displays, with information about the Template Editor. Click **Skip** then **Don't show again for this class**.
6. To make the template creation process easier, click **Toggle Side Panel** in the upper-left to display the Side Panel, which features the Components and Assets tabs. That way, you pick and choose the components you want to drag-and-drop onto the template.
7. If required, define additional properties for the template.
8. Edit the template to define the:
  - a. **Structure**: predefined content that cannot be changed on resultant pages.
  - b. **Initial Content**: predefined content that can be changed on resultant pages.
  - c. **Layouting**: for a range of devices.
9. On the page that contains your new template, click **Enable** to allow the template for use when creating a page. When the template is enable, the word, "Draft" changes to "Enabled," and if you are in the Card View, the top of the card changes from orange to green.
10. Allow the template for the required page or branch of your website.

## Editing the Template

Let's see what else can be done with templates.

### Change the Structure

Editing the template structure, and adding new components will be reflected on the pages that resulted from it.

### Add Initial Content

It is also possible to define the initial content for a template, which will be copied over to newly-created pages.

## Modify Content Policies

The content policy allows you to link to a design configuration. This allows you to reuse the same design configurations across different templates. It is a powerful concept, but also implies you need to be cautious when modifying content policies that might be used on other templates.

For example, If you change the list of allowed components on the layout container placeholder, this will affect the pages which will be created from the template.



NOTE: A content policy can also be assigned to the page component itself.

## Best Practices

- Check the impact of changes to templates (that are enabled) on the pages created from that template
  - › Here's a list of the different operations that are possible on templates, and on how they affect the related pages:
    - » **Changes to the structure:** they apply to the pages immediately (of course, publication of the changed template is still needed for visitors to see the changes)
    - » **Changes to content policies and design configurations:** they apply to the affected pages immediately (likewise, publication of the changes is needed for visitors to see the changes)
    - » **Changes to the initial content:** they only apply to newly created pages
    - » **Changes to the layout:** depending on whether the modified component is part of structure or initial content, they apply immediately, or only on newly created pages
    - » **Locking or unlocking components of enabled templates:** this can have dangerous effects when a template isn't a draft anymore, meaning that existing pages can already use it. Typically, newly unlocked components will be missing on existing pages, and locking components that were editable will hide that content from being displayed on the pages.
  - Create your own folders for site-specific templates
  - Publish your templates from the Templates console

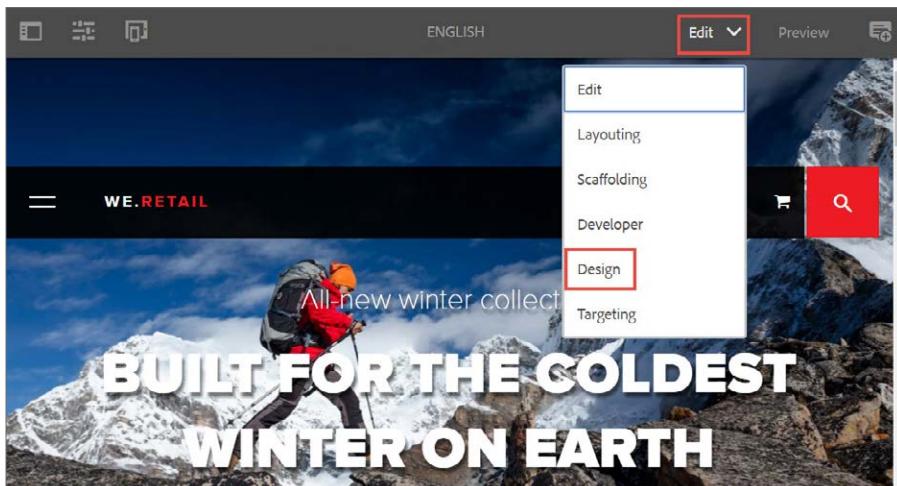


Perform Task 1: **Create, edit, and use a template to create a page**, from the Lab Activity section.

# Exploring the Design Mode

When Adobe Experience Manager instance is installed out-of-the-box, a selection of components are immediately available in the Components browser.

In addition to these, various other components are also available. You can use Design mode to Enable/disable such components. When enabled and located on your page, you can then use the **Design** mode to configure aspects of the component design by editing the attribute parameters.



## Enable or Disable Components

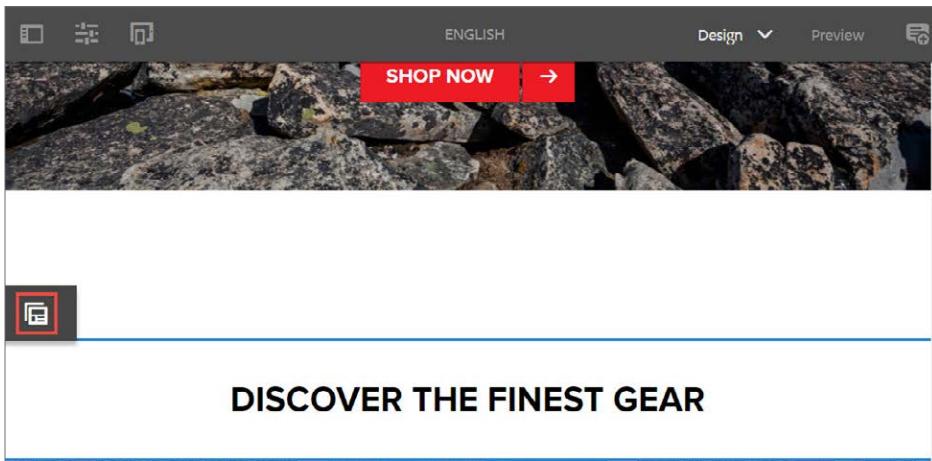
The process actually involves adding, or removing, the components allowed in the paragraph system for the page. The paragraph system (parsys) is a compound component that contains all other paragraph components. The paragraph system allows authors to add components of different types to a page as it contains all other paragraph components. Each paragraph type is represented as a component.

To either enable or disable a component:

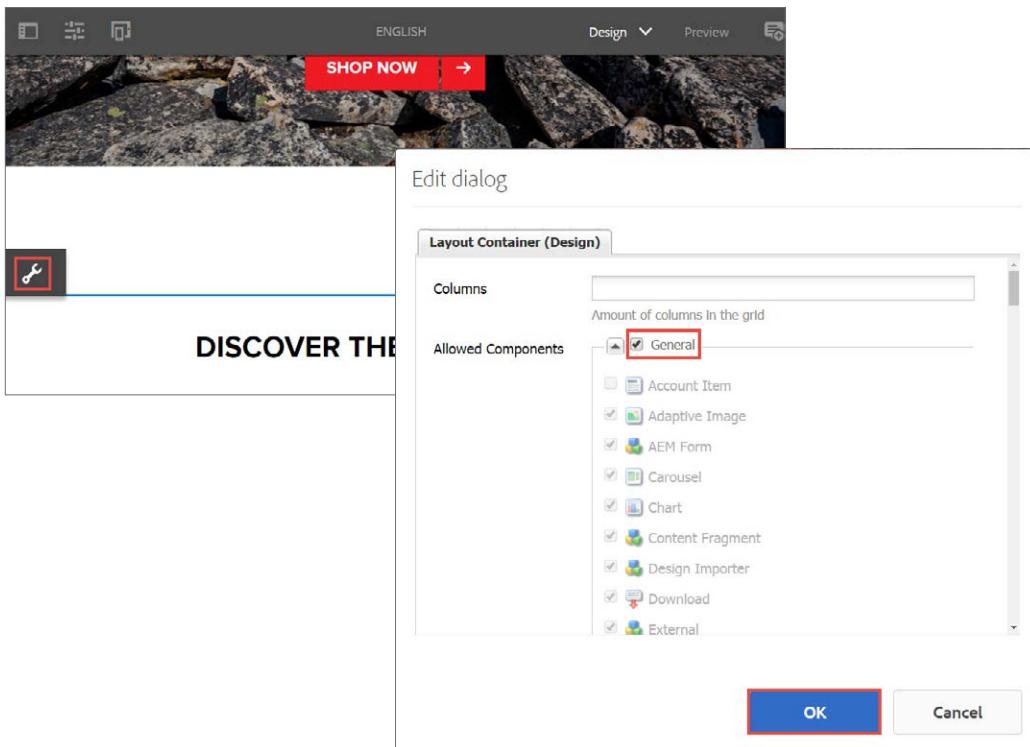
1. Open the page, and then select the **Design** mode from **Edit** drop-down.



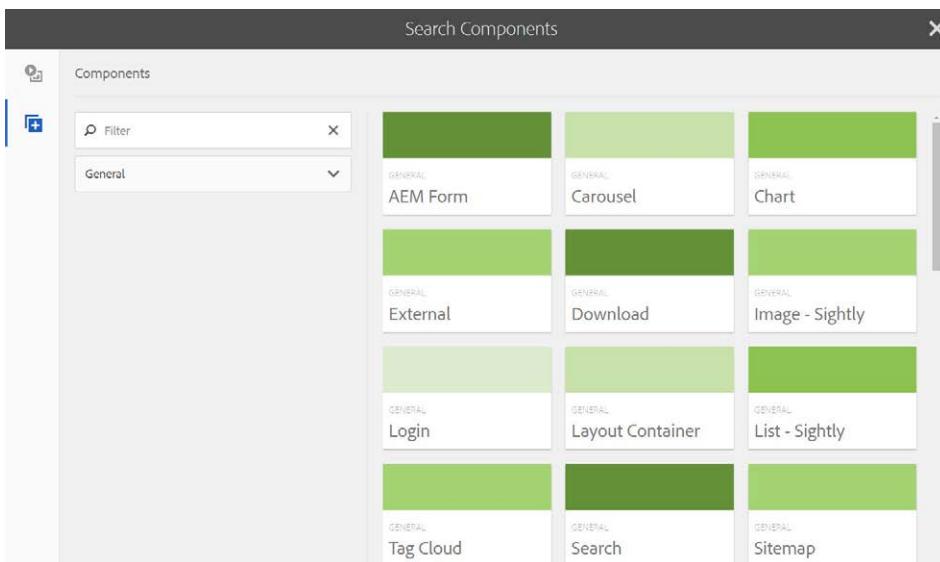
2. Click on a component (with a blue border):
3. Click the **Parent** icon, this will select the paragraph system containing the current component.



4. Click the **Configure** icon for the paragraph system.
5. Use the **Edit dialog** to define the components available in the components browser when editing the current page:
6. Select **OK** to save your configuration.



You define the configuration per page component. If child pages use the same template and/or page component (usually aligned), then the same configuration will be applied to the corresponding paragraph system.



# Creating and Managing Content Fragments

---

Adobe Experience Manager (AEM) Content Fragments allow you to design, create, curate and use page-independent content.

The number of communication channels is increasing annually. However, you (probably) do not want to use exactly the same content for all channels - you need to optimize your content according to the specific channel.

With content fragments, you can:

- consider how to reach target audiences efficiently across channels
- create and manage channel-neutral editorial content (including for example, text, images, and video)
- build content pools for a range of channels
- design content variations for specific channels.

## Content Fragments

- Stored as Assets
  - Content fragments (and their variations) can be created and maintained from the **Assets** console.
- Used in the page editor by means of the Content Fragment component (referencing component):
  - The **Content Fragment** component is available to page authors. It allows them to reference the required content fragment.
- Are content type that contain one or more:
  - Text elements
  - References to associated assets (for example, images, videos, and other fragments)
- Are independent from the delivery mechanism (for example, page or channel).
- Can contain variations of master elements to adjust fragment text according to the specific editorial or channel requirements.

- Have a hierarchical structure:
  - › Content fragment: parent node
  - › Elements: child nodes
- Are defined by a Fragment Template.

## Components of Content Fragment

Content fragments are made up of:

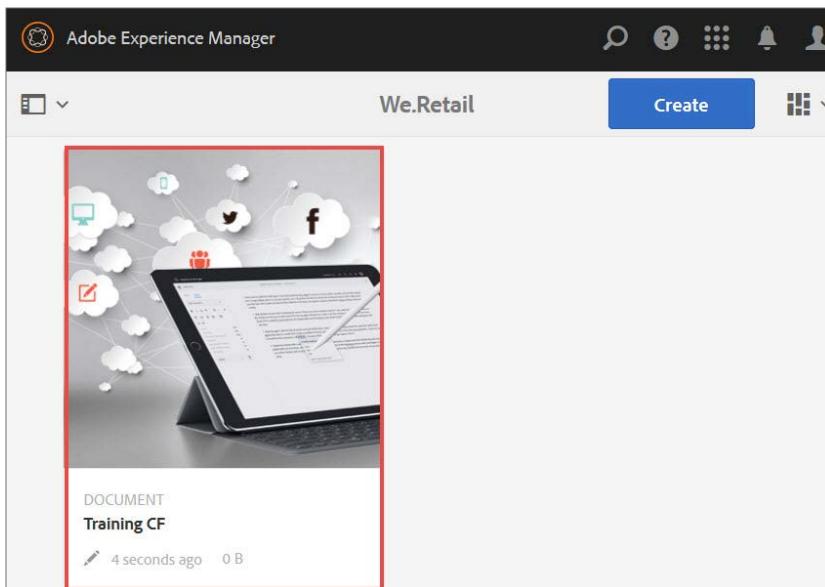
- Fragment Elements
  - › Text assets.
  - › Dedicated nodes in the repository, as child nodes of a fragment's parent node.
  - › Typically text, with unique functionality, design and layout, requiring unique components.
  - › Defined in the fragment template (cannot be defined when authoring the fragment, but can be selected for use).
- Variations
  - › Renditions of fragment text that are specific to editorial purpose; can be related to the channel but are not compulsory, but can also be for ad-hoc local modifications.
  - › Can be defined during fragment authoring or pre-defined in fragment templates.
  - › Stored in the fragment, to help avoid scattering of content copies.
- Fragment Paragraphs
  - › Blocks of text, within an element or variation, separated by vertical spaces (carriage return)
  - › In rich text mode, you can format a paragraph as a header, in which case it and the following paragraph belong together as one unit.
  - › Enable content control during page authoring,
- Fragment Metadata
  - › Use the Assets metadata schemas.
  - › Tags can be created when you create and author the fragment, or added later by editing the fragment properties.
- Associated Content
  - › This is content external to, but with editorial relevance for, a fragment. Typically images, videos, or other fragments.
  - › Associated to fragments via collections. Associated collections enable curation of content that is relevant to the fragment.
  - › Collections can be associated to fragments via templates, as default content, or by authors during fragment authoring.
- Fragment Template
  - › Defines the structure of a fragment (title, number of text elements, tag definitions, variations, and associated collections).

- › Template definitions require a title and one text element; everything else is optional. The template defines a minimal scope of the fragment and associated default content if applicable. Authors can later extend a fragment beyond what is defined in the template.
- › Does not define channels (at least not directly). It defines variations that can be used for channels. Channels themselves (delivery) are defined and controlled by components.
- Content Fragment Component
  - › Responsible for layout and delivery of a fragment (for example, channels).
  - › Fragments need one or more dedicated components to define layout and deliver some or all elements/variations and associated content.
  - › Dragging a fragment onto a page in authoring will automatically associate the required component.

## Creating Content Fragments

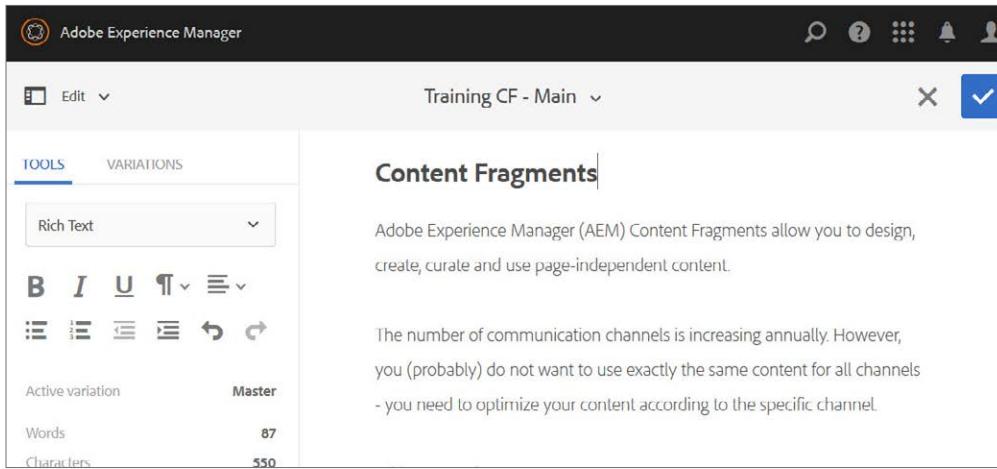
Steps to create content fragments are:

1. In the **Assets** console navigate to the required folder.
2. Select **Create**, then **Create Content Fragment**.
3. In the **Template** step, select the fragment type (for example, **Simple Fragment**) then click **Next**.
4. In the **Properties** step, specify the **Title**.
5. Select **Create** to complete the process. Your Assets folder now contains a new content fragment.



## Editing Content Fragments

1. Use the **Assets** console to navigate to the location of your content fragment.
2. Click **Select** to select the content fragment, and then click **Edit** for to open the content fragment for editing.
3. In the fragment editor, you can add and format the content.



4. Click the **Variations** tab to create fragment variations. When you first create a content fragment, you have what's called the Master.

You can edit the fragment content (for the appropriate element and/or variation) using the following formats:

- Rich Text: allows you to format the content (Bold, Underline, Bullets, and so on).
- Plain Text: allows for rapid entry of content without formatting or markdown information.
- Markdown: allows you to format your text using markdown (Heading Notation, Paragraphs and Line Breaks, Links, Images, and so on)

The screenshot shows the AEM interface with the following details:

- Header:** Adobe Experience Manager
- Toolbar:** Edit, Search, Help, Grid View, Notifications, User Profile
- Page Title:** Training CF - Main
- Left Sidebar (Tools):**
  - Rich Text** (selected)
  - Plain Text
  - Markdown
  - Words: 50
  - Characters: 345
  - Characters (with spaces): 396
  - Sentences: 9
  - Avg. Sentence (words): 6
  - Avg. Sentence (chars): 38
  - Paragraphs: 8
- Main Content Area:**
  - Section:** Introduction
  - Text: Adobe Experience Manager (AEM) content fragments are created and managed as page-independent assets. They allow you to create channel neutral content, together with (possibly channel specific) variations. You can then use these fragments, and their variations, when authoring your content pages.
  - Section:** Components of Content Fragments
  - Text: Content Fragments have:
    - Fragments
    - Variations
    - Elements

## Actions on Content Fragments

You can perform different actions on content fragments, either directly, as quick actions, or from the toolbar (after selection):

- View Properties: Allows you to view and/or edit the metadata.
- Edit
- To Collection: Add the asset to a collection.
- Copy/Paste
- Move
- Publish/Unpublish
- Delete



Perform Task 2: Create, edit, and use content fragments in a page, from the Lab Activity section.

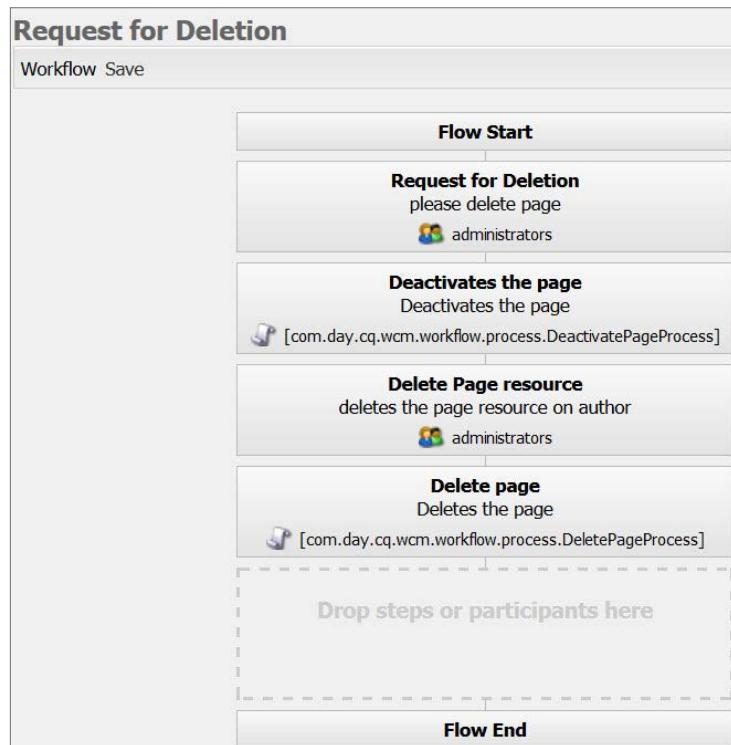
# Creating and Managing Workflows

Workflows allow you to automate Adobe Experience Manager activities. A workflow consists of a series of steps completed in a specific order. Each step performs a distinct activity, such as activating a page or sending an email message. Workflows can interact with assets in the repository, user accounts, and services.

For example, a key application of Adobe Experience Manager is Web Content Management (WCM), which allows you to generate and publish pages to your website. This functionality is often subject to organizational processes, including steps such as approval and sign-off by participants. Workflows can represent these processes, which in turn can be defined within Adobe Experience Manager, and then applied to the appropriate content pages.

Many useful workflow models are provided in Adobe Experience Manager (out of the box). In addition, you can create and define any number of custom workflow models, tailored to the specific needs of your project using the Workflow console.

The following is a sample workflow used to delete a page in Adobe Experience Manager:



## Workflow Objects

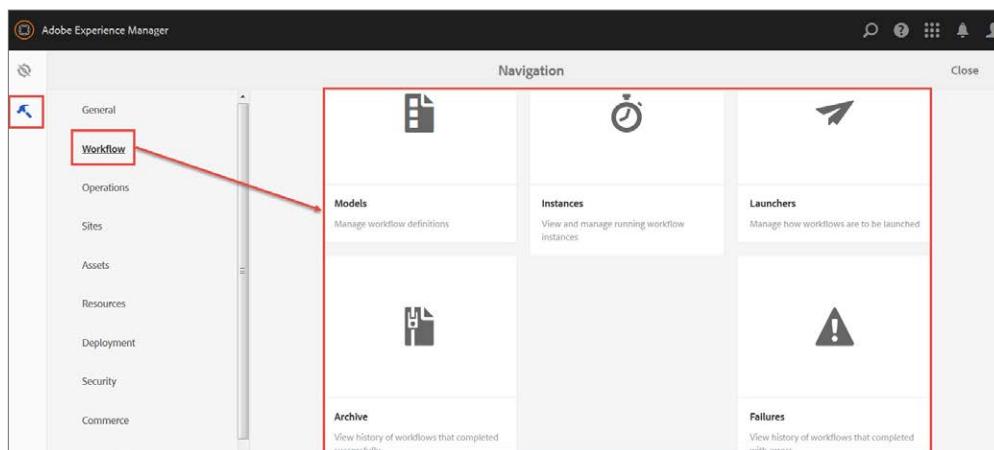
A workflow is associated with the following objects:

- Model—comprises nodes and transitions. The transitions connect the nodes and define the flow. The model always has a start node and an end node
- Steps—Workflow models consist of a series of different types that can be extended with scripts to provide the functionality and control you require.
- Transition—defines the link between two consecutive steps. You can apply rules to a transition.
- WorkItem—is an object that represents a task or action in the workflow system. A workflow instance can have more than one WorkItem at the same time.
- Payload—is an entity upon which a workflow instance acts. For example, a page in Adobe Experience Manager could be passed from step-to-step as a payload.
- Lifecycle—workflow begins when it is started, and ends when the end node is processed. You can apply the following actions on a workflow: terminate, suspend, resume, and restart. Completed and terminated instances are archived.
- Inbox—Users have their own workflow inbox in which the assigned WorkItems are accessible. The WorkItems are assigned either to a specific user itself or to the group to which the user belongs.

## Workflow Console

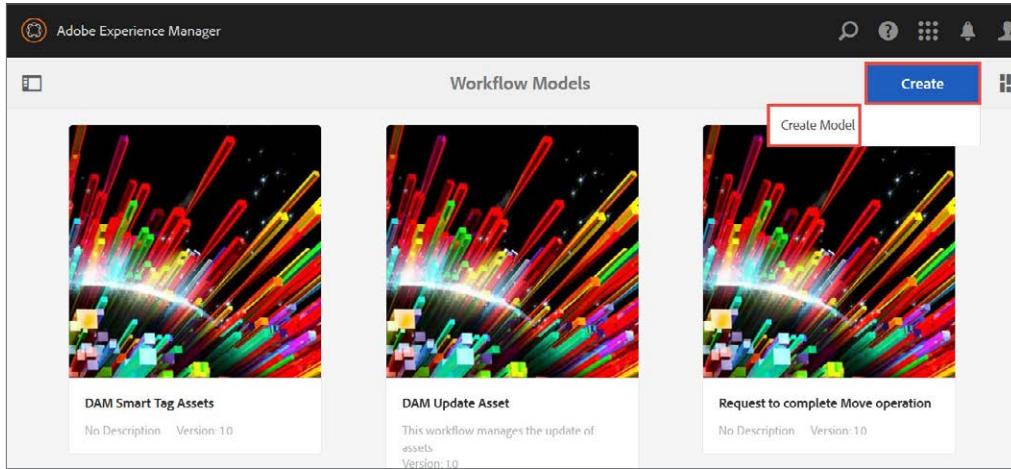
Adobe Experience Manager provides several tools and resources for creating workflow models, developing workflow steps, and for programmatically interacting with workflows.

The Workflow console is a centralized location for managing workflows. To access the Workflow console, from the rail, navigate to **Tools > Workflow**.

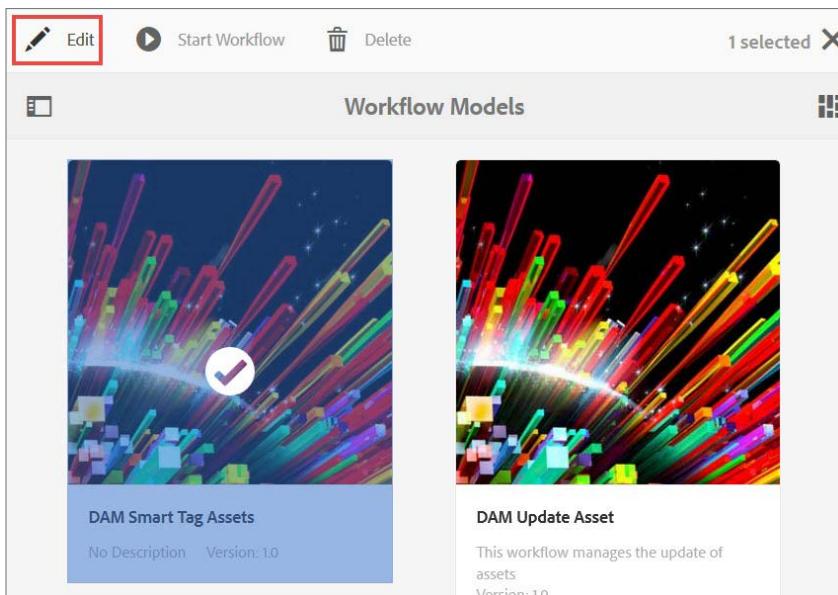


The Workflow console has the following options:

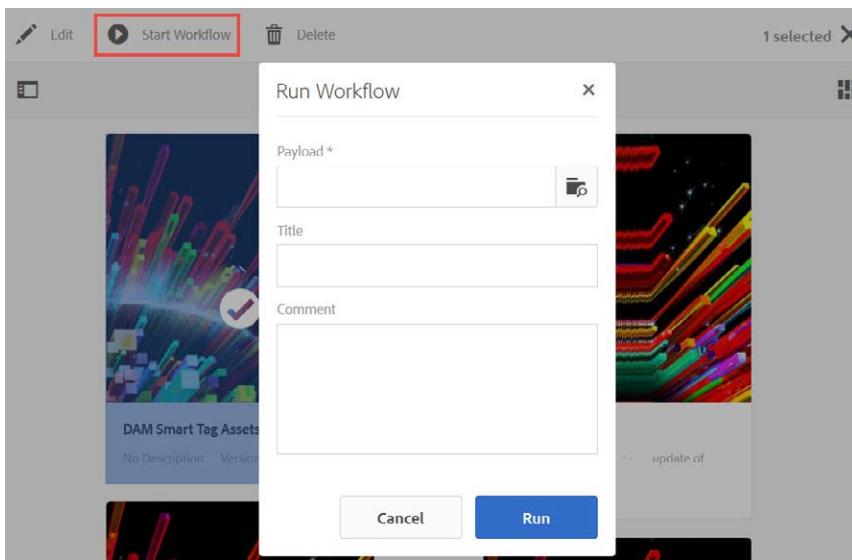
- Models: Allows you to create, edit, or delete workflow models.
  - a. Create workflow model



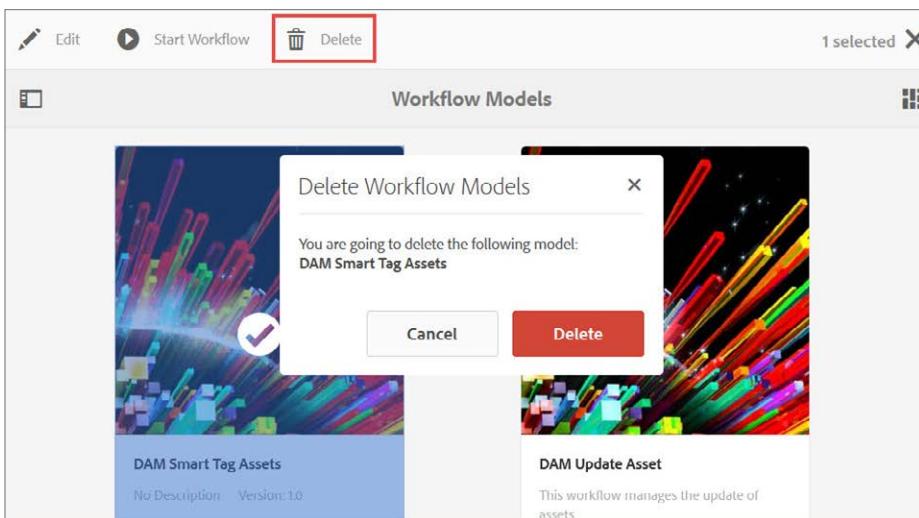
- b. Edit the workflow model: Select the desired model and click **Edit** from the toolbar. Allows you to edit the workflow steps.



c. Start Workflow: Allows you to add a payload and run the workflow instance.



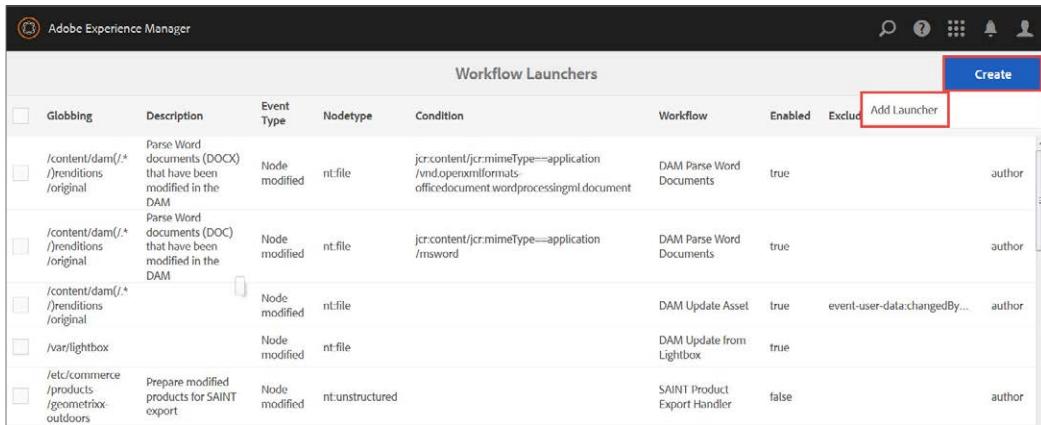
d. Delete: If you no longer need the workflow model, you can delete it.



- Instances: Display the details of active workflow instances. These instances are version-dependent.
  - Allows you to **Terminate, Suspend, Rename, and Open History** of the workflow instance.

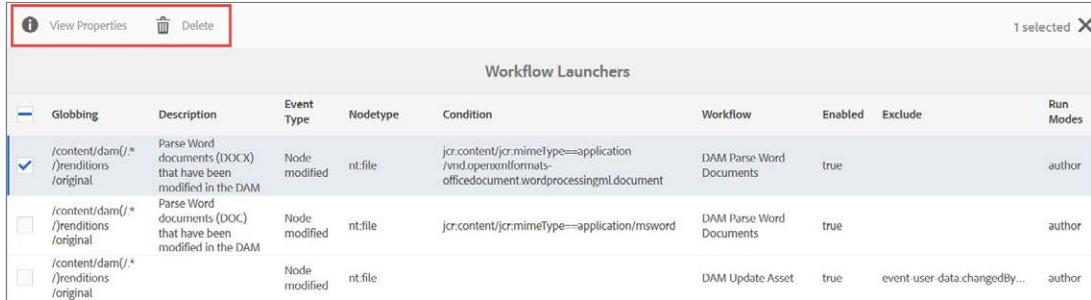
	Status	Initiator	Start Time	Model	Payload	Comment	Title	Version
<input checked="" type="checkbox"/>	RUNNING	admin	15-05-2016 12:05:39	DAM Smart Tag Assets	/content/we-retail/community/en/messaging			1.0

- Launcher: Allows you to define a workflow to launch if a specific event occurs in Adobe Experience Manager. You can also create new launchers.



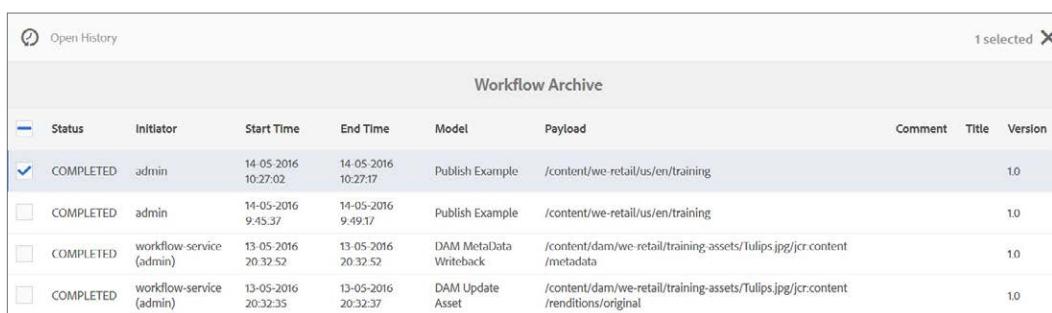
Workflow Launchers								
	Globbing	Description	Event Type	Nodetype	Condition	Workflow	Enabled	Exclude
<input type="checkbox"/>	/content/dam(/.* /renditions /original	parse Word documents (DOCX) that have been modified in the DAM	Node modified	nt:file	jcr:content/jcr:mimeType==application /vnd.openxmlformats-officedocument.wordprocessingml.document	DAM Parse Word Documents	true	
<input type="checkbox"/>	/content/dam(/.* /renditions /original	Parse Word documents (DOC) that have been modified in the DAM	Node modified	nt:file	jcr:content/jcr:mimeType==application /msword	DAM Parse Word Documents	true	
<input type="checkbox"/>	/content/dam(/.* /renditions /original		Node modified	nt:file		DAM Update Asset	true	event-user-data:changedBy...
<input type="checkbox"/>	/var/lightbox		Node modified	nt:file		DAM Update from Lightbox	true	
<input type="checkbox"/>	/etc/commerce /products /geometrix-outdoors	prepare modified products for SAINT export	Node modified	nt:unstructured		SAINT Product Export Handler	false	

- › You can view and edit the workflow instance properties, and also delete Launchers if you don't need them.



Workflow Launchers								
	Globbing	Description	Event Type	Nodetype	Condition	Workflow	Enabled	Exclude
<input checked="" type="checkbox"/>	/content/dam(/.* /renditions /original	Parse Word documents (DOCX) that have been modified in the DAM	Node modified	nt:file	jcr:content/jcr:mimeType==application /vnd.openxmlformats-officedocument.wordprocessingml.document	DAM Parse Word Documents	true	
<input type="checkbox"/>	/content/dam(/.* /renditions /original	Parse Word documents (DOC) that have been modified in the DAM	Node modified	nt:file	jcr:content/jcr:mimeType==application/msword	DAM Parse Word Documents	true	
<input type="checkbox"/>	/content/dam(/.* /renditions /original		Node modified	nt:file		DAM Update Asset	true	event-user-data:changedBy...

- Archive: Lets you access details of workflow instances that are completed and terminated.
  - › You can view the history of the workflow instance by clicking **Open History**.



Workflow Archive									
	Status	Initiator	Start Time	End Time	Model	Payload	Comment	Title	Version
<input checked="" type="checkbox"/>	COMPLETED	admin	14-05-2016 10:27:02	14-05-2016 10:27:17	Publish Example	/content/we-retail/us/en/training			1.0
<input type="checkbox"/>	COMPLETED	admin	14-05-2016 9:45:37	14-05-2016 9:49:17	Publish Example	/content/we-retail/us/en/training			1.0
<input type="checkbox"/>	COMPLETED	workflow-service (admin)	13-05-2016 20:32:52	13-05-2016 20:32:52	DAM MetaData Writeback	/content/dam/we-retail/training-assets/Tulips.jpg/jcr:content /metadata			1.0
<input type="checkbox"/>	COMPLETED	workflow-service (admin)	13-05-2016 20:32:35	13-05-2016 20:32:37	DAM Update Asset	/content/dam/we-retail/training-assets/Tulips.jpg/jcr:content /renditions/original			1.0

- Failures: Lets you monitor and manage failed workflow instances.
  - › Provides **Terminate**, **Retry Step**, **Terminate and Retry** options to complete the workflow steps.

The screenshot shows a table titled "Workflow Failures" with the following data:

Status	Initiator	Start Time	Model	Payload	Comment	Title	Version
RUNNING	admin	15-05-2016 12:05:39	DAM Smart Tag Assets	/content/we-retail/community/en/messaging		1.0	

- › Allows you to view the failure details and history of the workflow instance.

The screenshot shows a table titled "Workflow Instance History" with the following data:

Status	Title	Initiator	Start Time	End Time	Action	Comment	Title	Version
Completed	Start	admin	14-05-2016 10:27:02	14-05-2016 10:27:02	NodeTransition		1.0	
Completed	Validate Content	admin	14-05-2016 10:27:02	14-05-2016 10:27:17	WorkflowCompleted		1.0	
Completed	Publish Content	workflow-service	14-05-2016 10:27:17	14-05-2016 10:27:17	WorkflowCompleted		1.0	

## Workflow Model

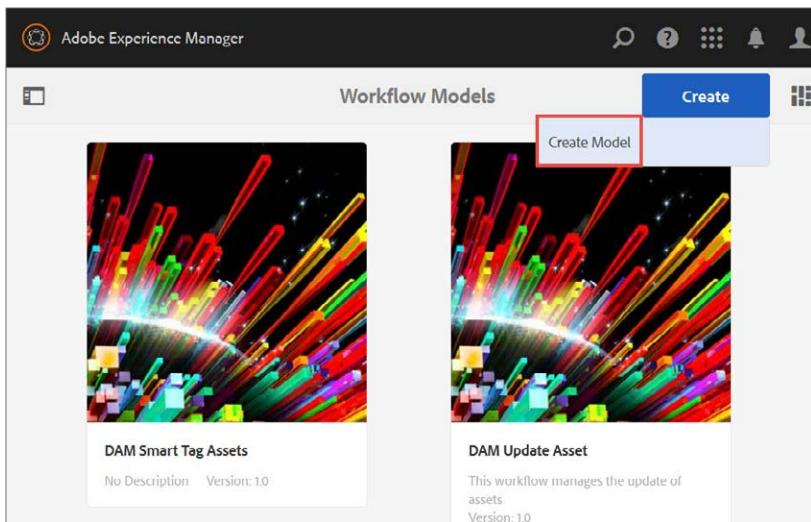
Based on your business requirement, you can create a workflow. You can also edit an existing workflow model to meet your requirement.

A workflow model includes a Flow Start and a Flow End step. These steps indicate the beginning and end of the workflow. All other steps are contained within these two steps.

Every new model created includes a sample participant step, which you can either edit or remove. You can add and configure additional steps as required.

## Creating a Workflow Model

You can create a new workflow model from the Tools > Workflow > Models > Create > Create Model.



## Editing a Workflow Model

When you create a new workflow, a skeleton workflow is created with the following minimum steps.

- Flow Start: A mandatory step to start the workflow. You cannot edit or delete this step.
- Step 1: A Participant step. You can edit or replace this step; you can also add more steps.
- Flow End: A mandatory step for every workflow. The End step terminates the workflow, or passes control back to the parent workflow in the case of a child (sub-) workflow.

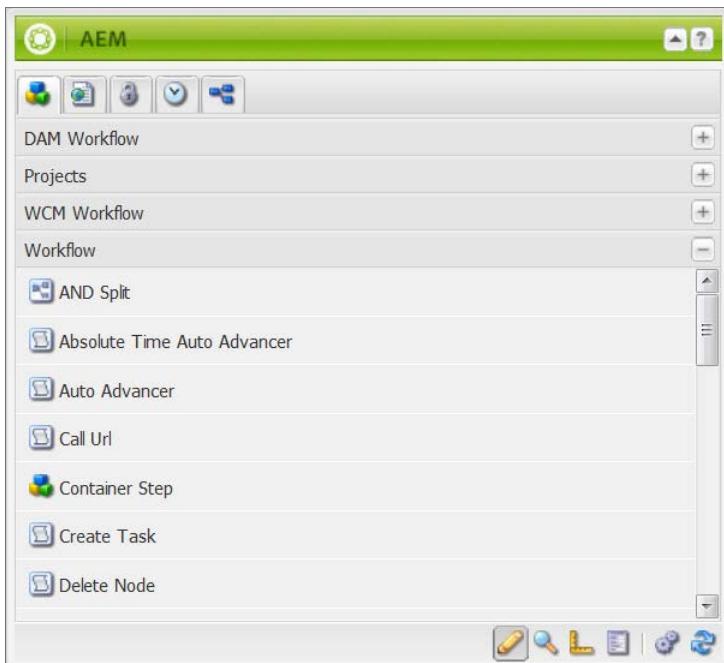


First let's look at what a workflow step is.

A workflow consists of one or more steps. Each step can contain any number of actions and associated conditions. For example, a step in a publish workflow may involve approval from an editor. Some steps may require manual intervention, while others may be automatic.

In Adobe Experience Manager, there are a number of steps available for workflows, such as:

- Participant step
- Process step
- Create Task
- Delete Node
- Dialog Participant step
- Dynamic Participant step
- Form Participant step



Two of the most commonly used workflow steps are the Participant step and the Process step.

### *Participant Step*

- Participant step allows you to assign a step to a user or a group of users.
  - › If the workflow is assigned to just one user, then that particular user needs to complete the assigned task before the workflow can proceed to the next step.
  - › If the workflow is assigned to a group of users, then all the users need to complete the step.

- You can notify users of their required action through email. Also, if configured, the participants will receive an email notification when the workflow is completed or if the workflow is aborted.
- You can configure timeouts and timeout handlers for this step. Timeout is the period after which a step is timed out.

### *Process Step*

- Process step has in-built processes that you can use:
  - Workflow control processes: These processes control the behavior of the workflow, and do not perform any action on content.
  - Basic processes: These processes perform simple tasks such as deleting a node or logging a debug message.
  - WCM processes: These processes perform WCM-related tasks such as activating a page and confirming registration.
- Versioning processes: These processes perform version-related tasks such as creating versions of the payload.
- DAM processes: These processes perform DAM (Digital Asset Management)-related tasks such as creating thumbnails, creating sub-assets, and extracting metadata.
- Collaboration Processes: These processes are related to the collaboration features of Adobe Experience Manager, such as social communities.

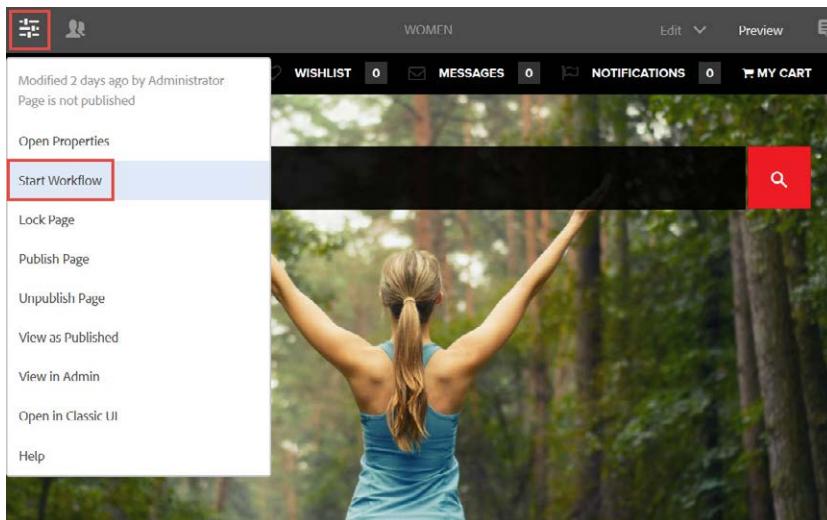
## Using Workflows

After you define your workflow, you will want it to be used when managing your website. The following sections detail the different tasks involved in workflows.

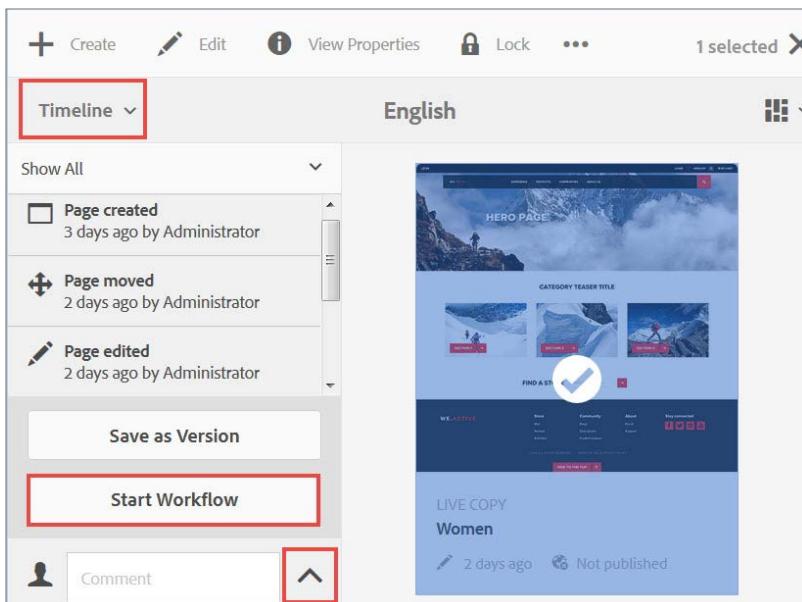
### Starting Workflow for a Page

You can start the workflow using the following methods:

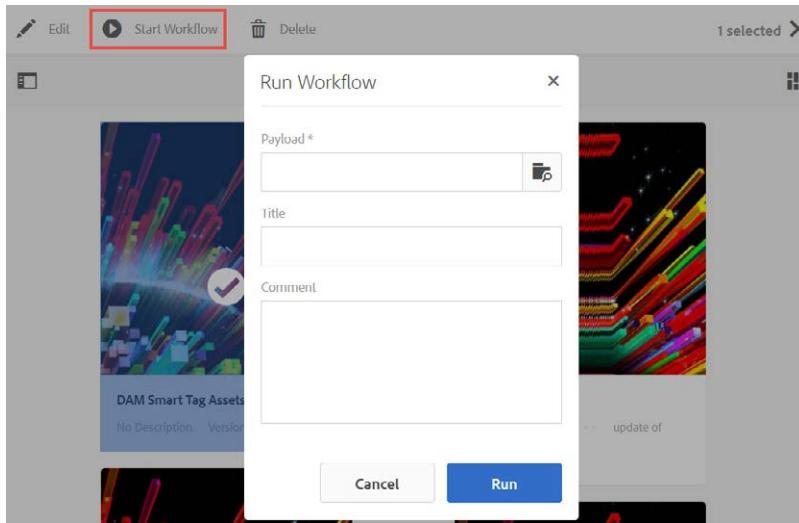
- **From the page:** You need to specify the workflow model to be run for the page.



- **Using Timeline:** Select the page and click left rail, and then **Timeline** from the drop-down. You need to specify the workflow model to be run for the page.



- **From the Workflow console:** You need to link a workflow to its payload. The payload (including pages, nodes, and resources) will then be subject to this instance of the workflow.




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**NOTE:** If the main copy of the workflow is updated after assigning the current version of the workflow to a page, then the changes will have no impact.

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## Taking Action on a Participant Step

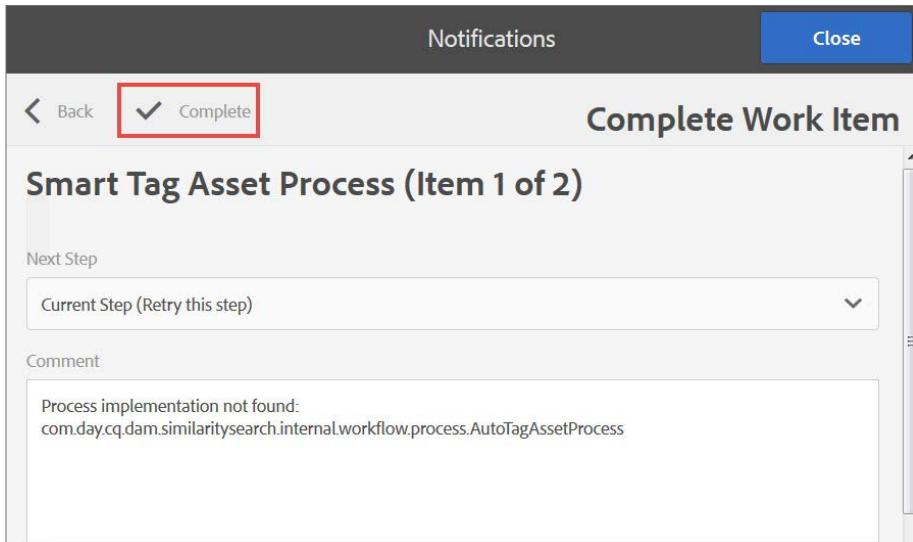
Any participant steps that you created will be assigned to a specific user or group, who will need to take action:

- **Complete**—to complete the selected workflow item.
- **Step Back**—the user can step back to repeat a section of the workflow.
- **Delegate**—you can delegate a task to a specific user, only if the task is assigned to a group of users.



## Completing a Workflow

To complete the workflow, you need to can take action on each of the steps assigned to you, and then click **Complete**.



Perform **Task 3: Create, edit, and use a workflow model to automate the page publishing process**, from the Lab Activity section.

# Creating and Managing Launches

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Launches enable you to efficiently develop the content for a future release of one or more activated web pages.

## When do you create launches?

A launch is created to changes ready for future publication while maintaining the current pages. After editing and updating your launch pages, you can promote them back to the source, and then activate the source pages (top-level). Promoting duplicates the launch content back to the source pages and can be done either manually or automatically (dependent on fields set when creating and editing the launch).

For example, the seasonal product pages of your online store are updated quarterly so the featured products align with the current season. To prepare for the next quarterly update, you can create a launch of the appropriate web pages. Throughout the quarter, the changes are accumulated in the launch copy. When the next quarter arrives, you promote the launch pages so that you can publish the source pages (holding the updated content).

## Using Launches

Launches allow you to perform the following actions:

- Create a copy of your source pages
  - › The copy is your launch.
  - › The top-level source pages are known as Production.
- Promote and publish the content either manually or automatically

Manual	Automated
Promote launch content back to the target page when it is ready to be published.	Using the following fields/flags: Launch (Live) date Production Ready
Publish the content from the source pages.	If the Production Ready flag is set, the launch will be automatically promoted to the production pages on the specified Launch (Live) date.  After the promotion, the production pages are automatically published. If no date is set, the flag will have no effect.

- Update your source and launch pages in parallel
  - › Changes to the source pages are automatically implemented in the launch copy (that is, the Live copy).
  - › Changes can be made to your launch copy without disrupting the automatic updates or the source pages.
- Create a nested launch—a launch within a launch
  - › The source is an existing launch.
  - › You can promote a nested launch to any target page; this can be a parent launch or the top-level source pages (Production).

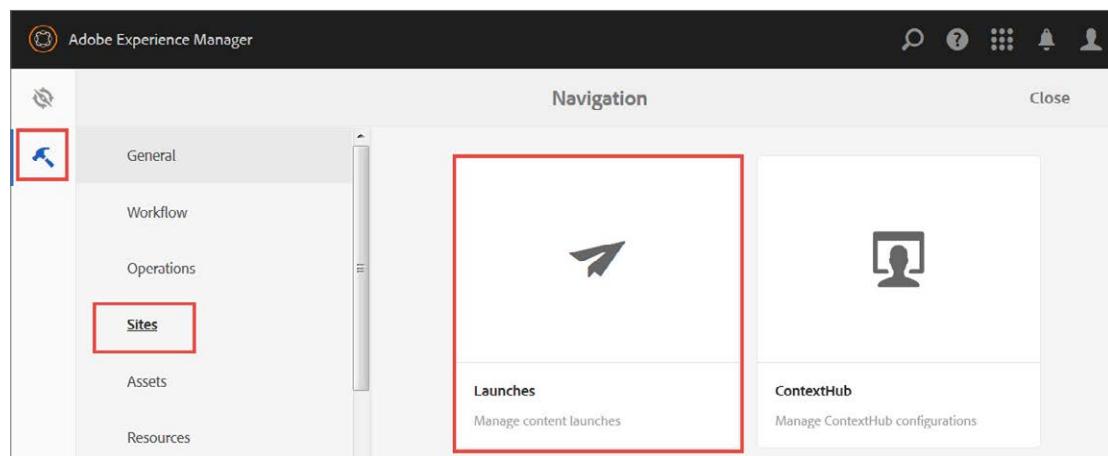
## Accessing Launches

You can access launches and perform various actions on it from two ways:

- Launches console
- References - Sites console

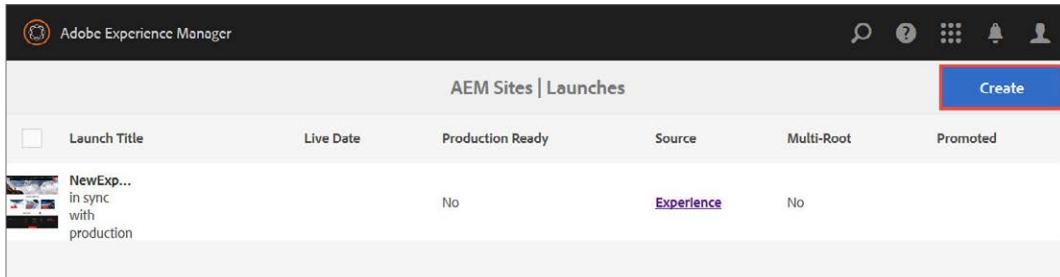
## Launches Console

The Launches console is available from **Tools > Sites** section.



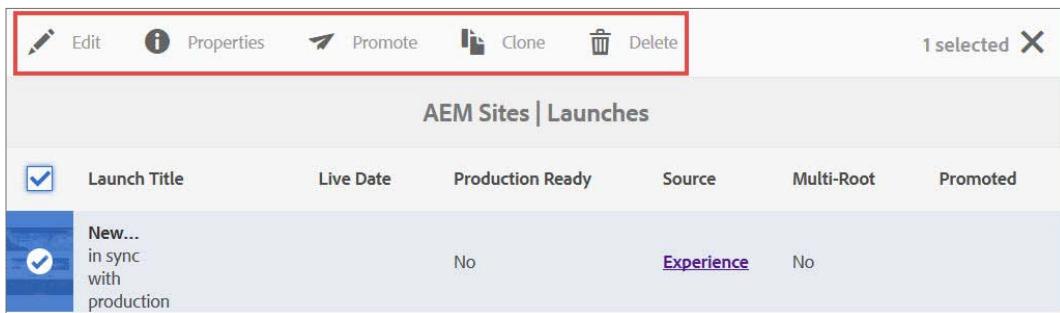
From Launches console, you can:

- Create launches by selecting the source and specifying the properties to it.



The screenshot shows the AEM Sites | Launches interface. At the top right, there is a red-bordered "Create" button. Below it is a table with columns: Launch Title, Live Date, Production Ready, Source, Multi-Root, and Promoted. There is one entry: "NewExp... in sync with production" under "Launch Title". Under "Source", it says "Experience". Under "Promoted", it says "No".

- Perform actions such as **Edit**, **view Properties**, **Promote**, **Clone**, and **Delete** launches.

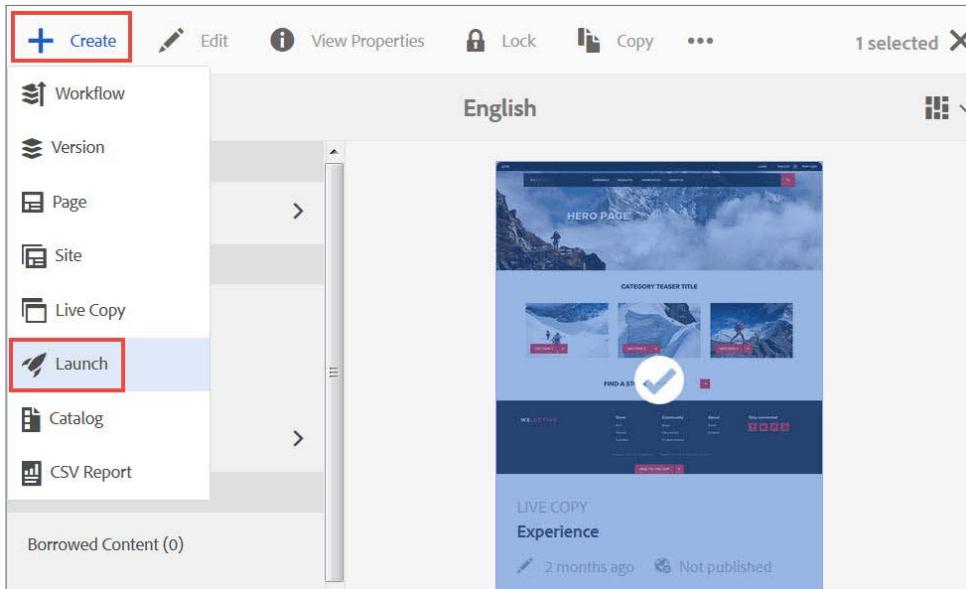


This screenshot shows the same AEM Sites | Launches interface as above, but with a selected launch entry. The "Launch Title" column has a checked checkbox. The top navigation bar has a red border around the "Edit", "Properties", "Promote", "Clone", and "Delete" buttons, and a "1 selected" indicator.

## References - Sites console

From Sites console, you can:

- Create launches by selecting the source, and then clicking **Create > Launch**.



The screenshot shows the AEM Sites console with a sidebar menu. The "Launch" option is highlighted with a red border. In the main area, there is a "Create" button at the top left. The central area displays a preview of a website page titled "HERO PAGE" with a "LIVE COPY" status. The sidebar also lists "Workflow", "Version", "Page", "Site", "Live Copy", "Catalog", and "CSV Report".

- View existing launches by selecting the source, select **References** from the left rail.
  - › From **References** panel, click **Launches (1)**, all the available launches appear.
  - › Click a launch for example, **NewExperience** to view various actions that can be performed on it.

The screenshot shows the 'References' panel in Adobe Experience Manager. On the left, there's a sidebar with 'LAUNCHES' selected. Below it, under 'NewExperiences', it says 'Updated 1 minute ago'. A red box highlights the 'LAUNCHES' menu item. On the right, there's a preview of a website page titled 'HERO PAGE' with a 'FIND A STAY' button. At the bottom, it says 'LIVE COPY Experience' and '2 months ago / Not published'.

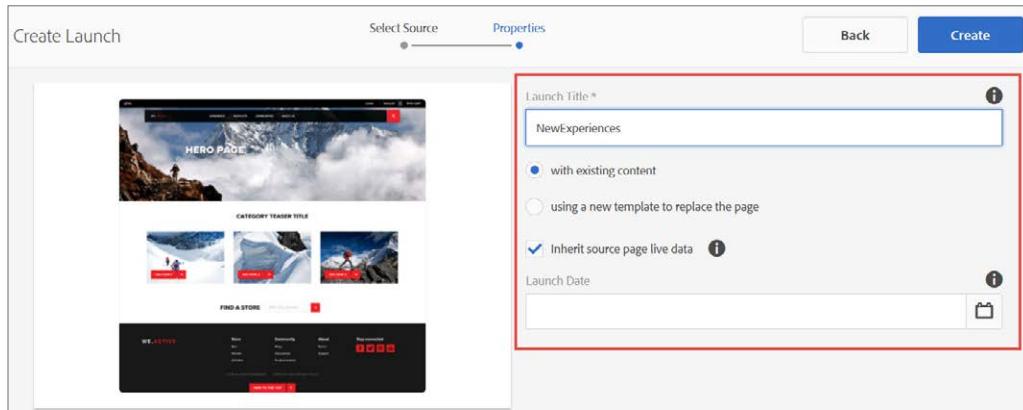
## Creating Launches

Create a launch to enable the updating of a new version of existing web pages for future activation.

When you create a Launch, you have to specify the following properties:

- **Launch Title:** The name of the Launch. The name should be meaningful for authors.
- **with existing content:** The original content will be used to create the launch.
- **using a new template to replace the page:** You can choose a new template for your launch
- **Inherit source page live data:** Select this option to automatically update the content of launch pages when the source pages change. This option achieves this by making the launch a live copy. By default, this option is selected.

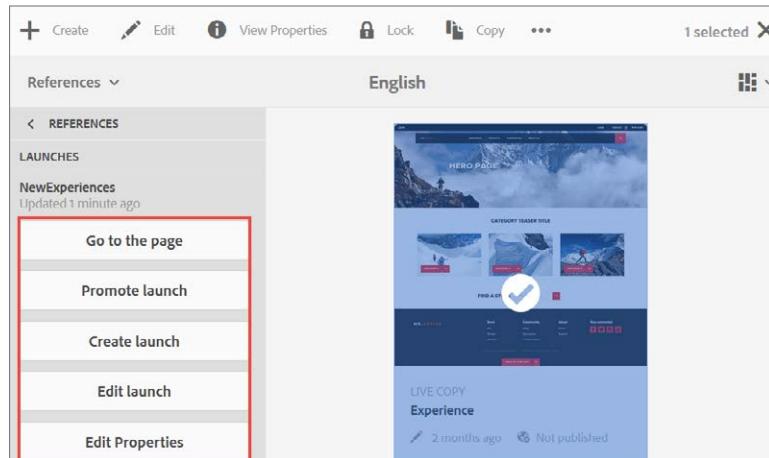
- **Launch Date:** The date and time when the launch copy is to be activated (dependent on the Production Ready flag; see Launches - the Order of Events).



## Actions on Launches

When a launch is created for a page (or set of pages), you can perform the following actions on it:

- **Go to the page**—opens the page in a window and allows you to edit the launch
- **Promote launch**—moves/promotes the launch to the production version
- **Create launch**—allows you to create a nested launch
- **Edit launch**—allows you to edit the launch configuration
- **Edit Properties**—allows you to edit launch properties such as **Title**, **Launch Date**, and so on.



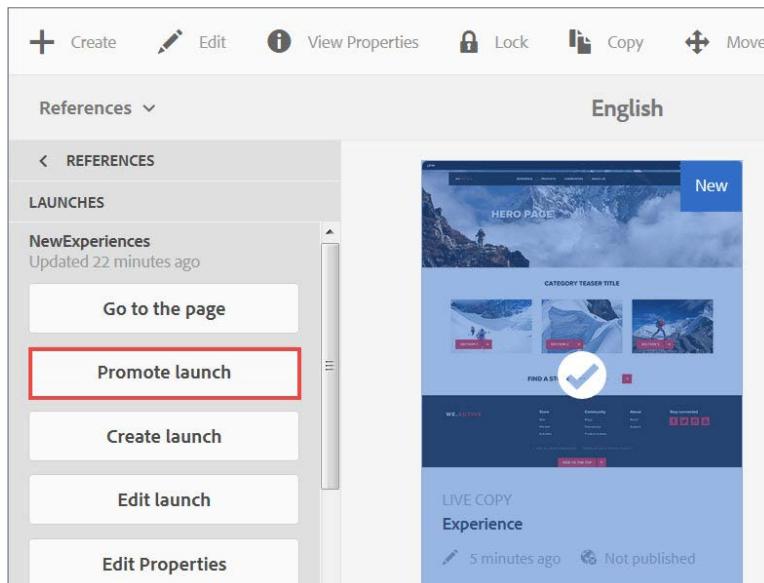
## Promoting Launches

You need to promote launch pages to move the content back into the source (production) before publishing. When a launch page is promoted, the corresponding page of the source pages is replaced with the content of the promoted page. The following options are available when promoting a launch page:

- Whether to promote only the current page or the entire launch.
- Whether to promote the child pages of the current page.
- Whether to promote the full launch or only pages that have changed.

You can promote a launch from:

- **References**



- **Page Information**

- a. Click **Edit launch** from the drop-down you get after selecting a launch.
- b. Open the launch page, click **Page Information** icon, and you can select **Promote launch** from the drop-down to promote the page while editing it.

The image consists of two side-by-side screenshots of the Adobe Experience Manager (AEM) interface, illustrating the process of promoting a page through a launch.

**Screenshot 1 (Top):** This screenshot shows the 'Launches' section of the AEM interface. On the left, under 'LAUNCHES', there is a card for 'NewExperiences' (Updated 14 minutes ago). Below the card, a vertical menu lists several options: 'Go to the page', 'Promote launch' (which is highlighted with a red box), 'Create launch', 'Edit launch' (which is also highlighted with a red box), and 'Edit Properties'. To the right, a preview window displays a 'HERO PAGE' with three cards labeled 'CATEGORY TEASER TITLE'. At the bottom of the preview window, it says 'LIVE COPY Experience' and '1 minute'.

**Screenshot 2 (Bottom):** This screenshot shows the same 'Launches' section after the 'Edit launch' option was selected. The 'Edit launch' button is now highlighted with a red box. The preview window on the right shows the same 'HERO PAGE' with the three cards. At the bottom, it says 'LIVE COPY Experience' and '5 minutes ago'. Additionally, there is a note indicating 'Not published'.

## Deleting Launches

If you no longer need a launch, you can delete it from the **Launches** console.

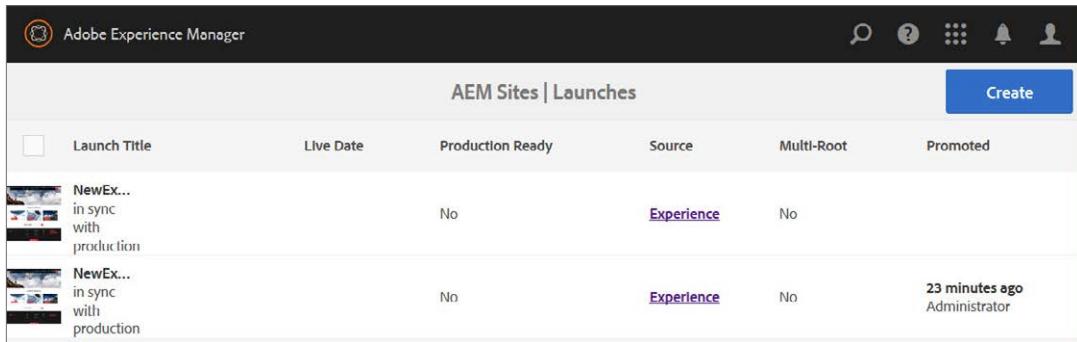
To delete a launch:

1. From **Tools**, navigate to **Sites > Launches** console. The Launches console with the list of launches appears.
2. Select the launch you want to delete, and then click **Delete** from the actions bar.

Launch Title	Live Date	Production Ready	Source	Multi-Root	Promoted
NewEn... in sync with production		No	English	No	
NewEx... in sync with production		No	Experience	No	
NewEx... in sync with production		No	Experience	No	21 minutes ago Administrator

3. Click **Delete** in the confirmation dialog box to delete the launch.

The deleted launch will no longer be available in the **Launches** console.



A screenshot of the Adobe Experience Manager (AEM) interface, specifically the 'AEM Sites | Launches' section. The page title is 'AEM Sites | Launches'. At the top right, there is a 'Create' button. Below the header, there is a table with the following columns: 'Launch Title', 'Live Date', 'Production Ready', 'Source', 'Multi-Root', and 'Promoted'. There are two rows of data:

Launch Title	Live Date	Production Ready	Source	Multi-Root	Promoted
NewEx... in sync with production	No	<a href="#">Experience</a>	No		
NewEx... in sync with production	No	<a href="#">Experience</a>	No	23 minutes ago Administrator	

 **NOTE:** The entire launch is deleted even if you have promoted only one page.

 **CAUTION:** When deleting nested launches, you should delete lower levels first.

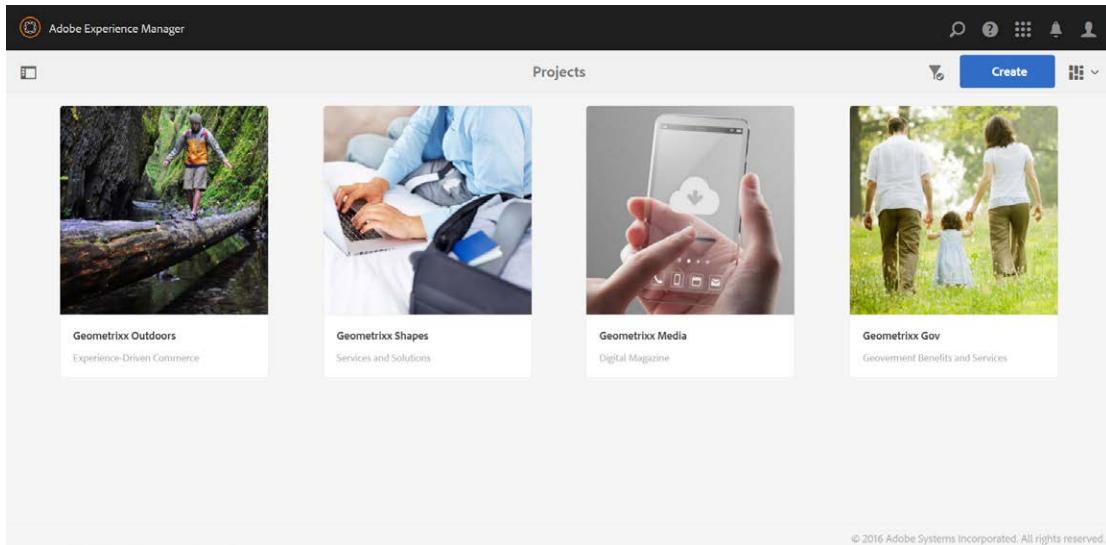
 Perform **Task 4: Create, edit, and promote a launch**, from the Lab Activity section.

# Creating and Managing Projects

Projects let you group resources into one entity. It gives a common, shared environment, which makes it easy to manage your projects. The types of resources you can associate with a project are referred to as Tiles in Adobe Experience Manager. Tiles may include project and team information, assets, workflows, and other types of information.

## Projects Console

You access and manage your projects within Adobe Experience Manager using the **Projects** console, which appears when the application loads up. You can perform the following actions in the Projects console:



## Project Tiles

When you open a project, it contains tiles such as Assets, Experiences, and so on. You can associate different types of information with your projects by adding elements called Tiles. This section provides information about tiles.

The Projects console allows you to associate the following tiles with your project. Click the project to view all its tiles. In a project, you can view Project Information, Assets, Experiences, Team, and Workflows tiles.

The screenshot shows the Adobe Experience Manager Projects console for the 'Geometrixx Outdoors' project. The interface is organized into several sections:

- Project Information:** Shows the project title 'Geometrixx Outdoors', owner 'Administrator', and description 'Experience-Driven Commerce'.
- Assets (1):** Shows one asset tile.
- Experiences (3):** Shows three experience tiles: 'Main Site', 'Mobile Site', and 'Mobile App'.
- Assets (13):** Shows a grid of 13 asset tiles, including 'stylish blouses' and various images.
- Workflows (0):** Shows a placeholder 'Add Work'.

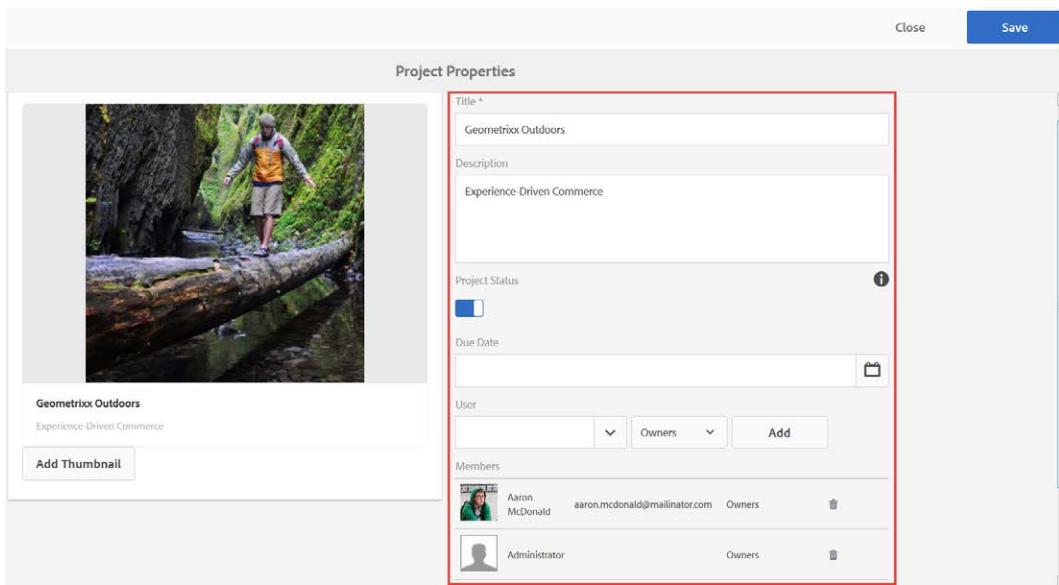
### • Project Information

- › This tile has Project Title, Owner, and Description on it.

The screenshot shows the Adobe Experience Manager Projects console displaying a list of projects:

- Geometrixx Outdoors** (selected, highlighted with a red border): Description 'Experience-Driven Commerce'.
- Geometrixx Shapes**: Description 'Services and Solutions'.

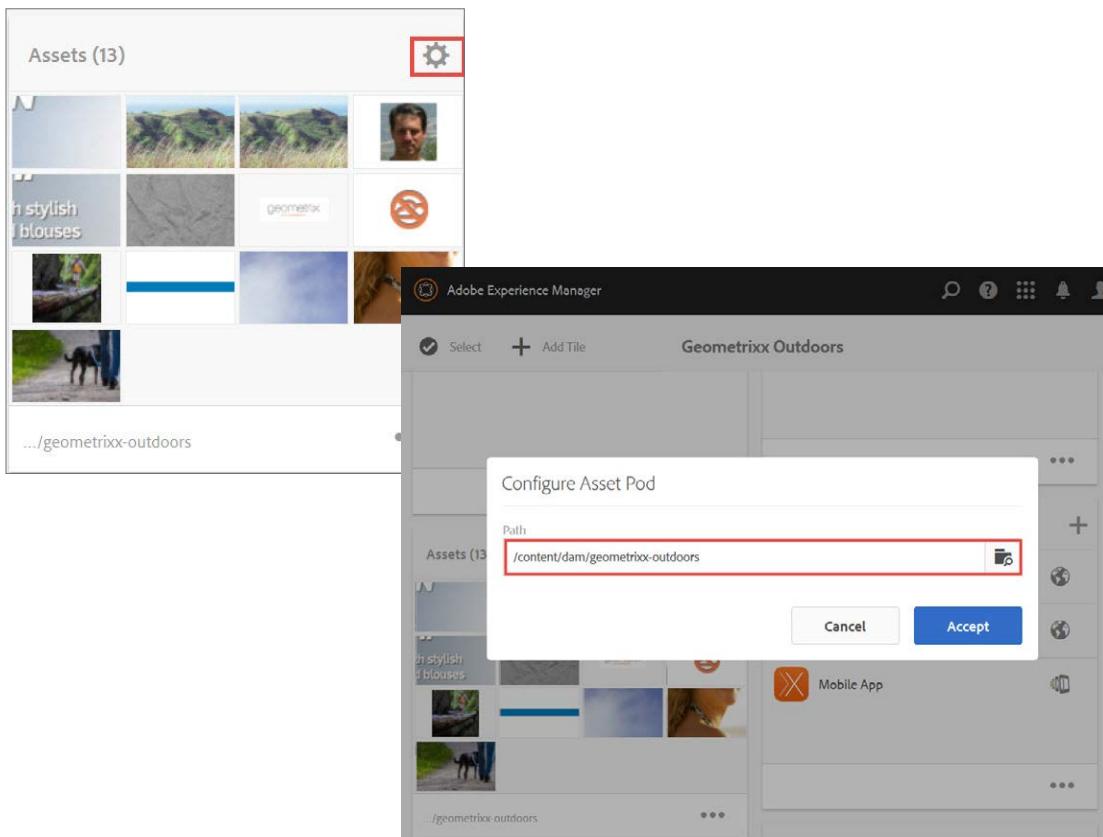
a. Select **Geometrixx Outdoors**, and click **View Properties** to view and edit various properties.



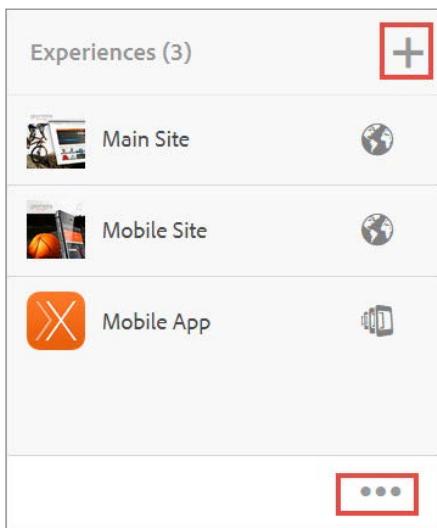
- **Assets**

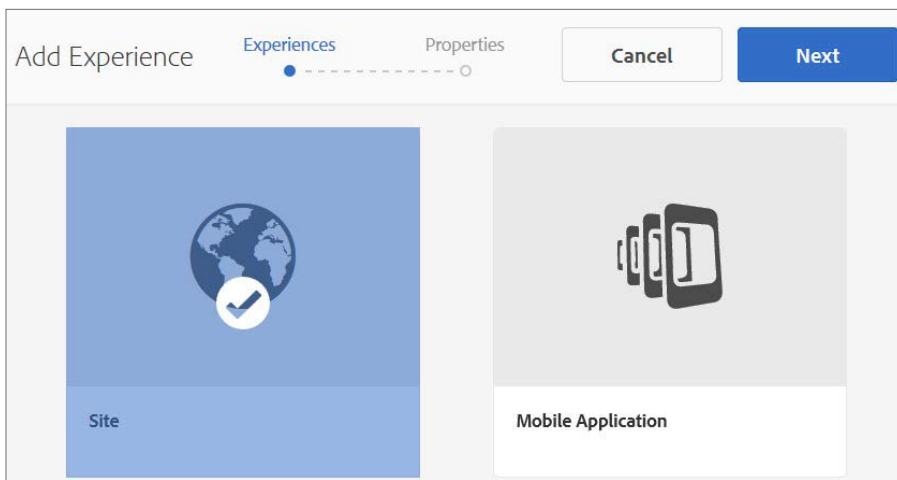
- › Lets you to save all the assets used for a particular project.
- a. Click ... on the **Assets** tile, the project folder in the **Assets** console appears, which contains all the assets used in that project.
- b. Click **Configure** (gear wheel icon) of the **Assets** tile to link it with other asset folders of the **Assets** console.

- **Experiences**—lets you add a Mobile app (supports various platforms), website, or digital publication to the project.



- To add more experiences to your project, click the + sign or click ... icon and then add an experience by selecting a type of experience.





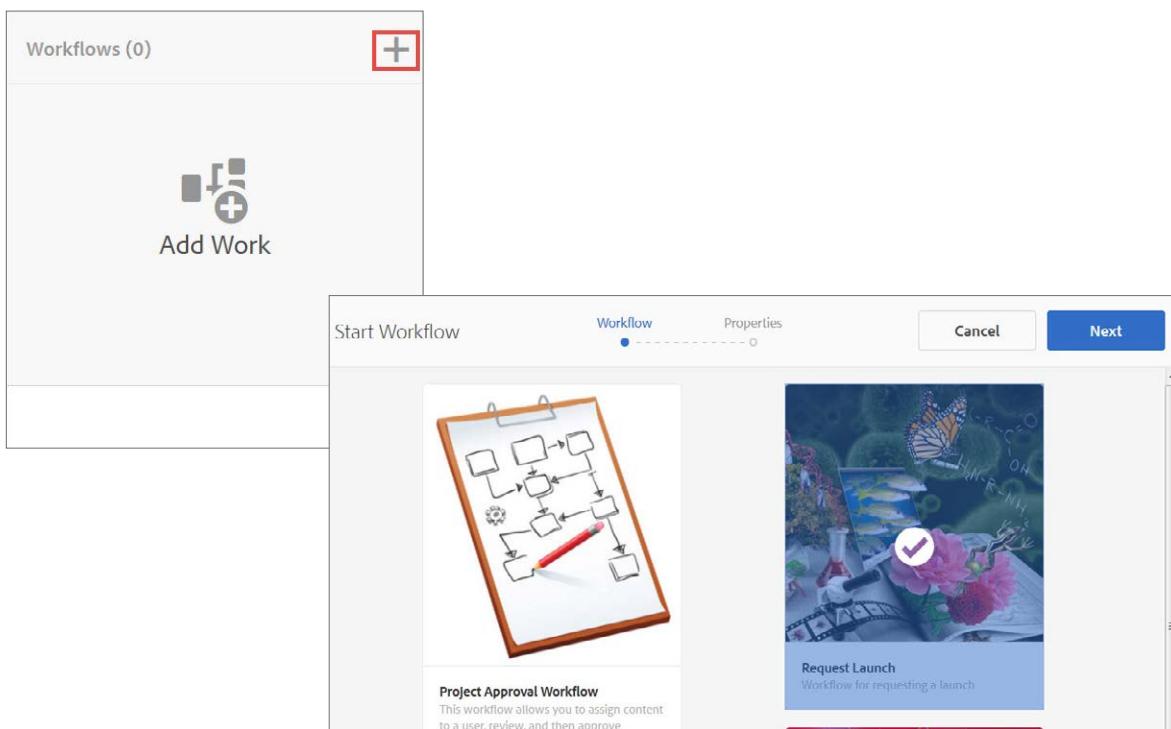
- Team—lets you specify the members of the project team.
  - a. Click ... to edit the name of the team member and assign the user role.

The screenshot shows a modal window titled 'Project Team'. At the top left is a section labeled 'User' with a dropdown menu and an 'Add' button. The main area is titled 'Members' and lists four users:

User	Role	Action
Aaron McDonald aaron.mcdonald@mailinator.com	Owners	
Administrator	Owners	
Andrew Schaeffer andrew.schaeffer@trashymail.com	Editors	
Ashley Thompson ashley.thompson@spambob.com	Observers	

At the bottom right of the modal are 'Close' and 'Save' buttons. To the left of the modal is a preview panel titled 'The Team (4)' showing four user profiles.

- **Workflows** – lets you assign your project to follow certain workflows. If workflows are running, their status is displayed in the Workflows tile.
- a. Click the + icon or **Add Work** to assign a new workflow to the project. Depending on which project you choose, you have different workflows available.



- b. Click the ... icon to view and take action on the workflow steps.

The screenshot shows a summary of workflows. It indicates 'Running 1 workflow' at 100% completion and 'Completed 0 workflows' at 0% completion. Below this is a 'Workflows' table with one row selected. The table columns are 'Work Name', 'Description', 'Started', 'Initiator', and 'Status'. The selected row for 'Ad Copy' shows the description: 'This workflow allows you to assign content to a user, review, and then approve.', and the details: Started May 17, Initiator Administrator, Status RUNNING.

Work Name	Description	Started	Initiator	Status
Ad Copy	This workflow allows you to assign content to a user, review, and then approve.	May 17	Administrator	RUNNING

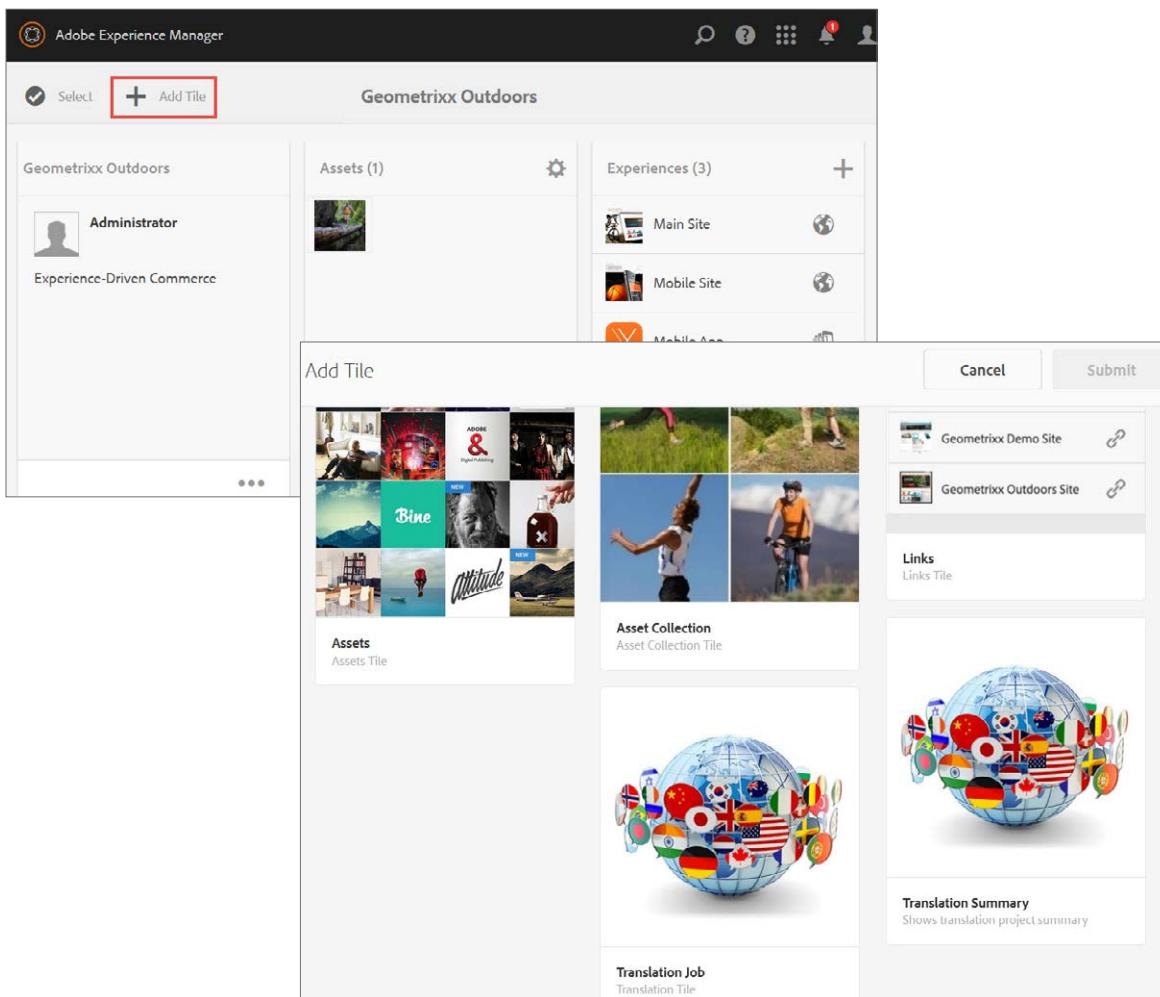
- Tasks—lets you monitor the status of any project-related tasks, including workflows.
  - a. Click ... icon to view all the tasks associated with the project.

The screenshot shows the 'Tasks' interface in Adobe Experience Manager. On the left, a summary card displays 'Tasks (0)' and a large green circle representing 100% completion. Below this are sections for 'Active' (0 tasks) and 'Completed' (0 tasks). A red box highlights the three-dot ellipsis icon at the bottom of the summary card. To the right, a detailed list of tasks is shown under the heading 'Tasks'. One task is visible: 'Ad Copy' (Workflow Task), which is described as allowing content assignment to a user. The task was launched from a workflow.

- b. Click the + icon to add a new task to the project.

The screenshot shows the 'Tasks' interface in Adobe Experience Manager. On the left, a summary card displays 'Tasks (0)' and a large green circle representing 100% completion. Below this are sections for 'Active' (0 tasks) and 'Completed' (0 tasks). A red box highlights the plus-sign icon at the top of the summary card. To the right, a modal dialog titled 'Task Details' is open, prompting for task information. The dialog includes fields for 'Title \*', 'Assign To \*', 'Content', 'Description', 'Task Priority' (set to 'Medium'), and 'Due Date'. At the bottom of the dialog are 'Cancel' and 'Submit' buttons.

You can new tiles to a project by clicking **Add Tile** from the actions bar.



## Project Life Cycle

Project life cycle represents work items to be completed on the project. You can track the project by looking at the timeline of the project, which gives you every detail of the running project. You can review, analyze, and act according to the requirement.

You can perform the following actions using the Projects console:

- Create projects
- Add tiles, assets, and experiences to a project
- Assign a workflow to a project
- Add and complete tasks assigned to a project
- Make projects active or inactive

There are additional actions you can perform on projects. A few of them are described in the following section. Let's look into each of these actions in detail.

### **Creating a Project**

You can create new projects from the **Projects** console. You can then add users to the projects as owners, editors, and observers.

The available projects are based on the project templates. Project templates are similar to Adobe Experience Manager page templates that are used to create new pages and sites. Project templates identify different types of projects and specify the user roles, workflows, and so on.

### **Adding tiles to a project**

The project template indicates which tiles are available when a project is created. You can also add additional tiles to your project.

### **Editing tiles of a project**

You can edit each tile of the project according to your needs. You can add links, assets, experiences, and workflows to the project.

### **Adding experiences to a project**

Projects are often used to create or update content for various channels. Using the Experiences tile, the project members can access and maintain all the experiences—Site, Publication, and Mobile Application in one place.

### **Adding workflows to a project**

Other important feature are the management of assignments and the control of processes related to a project. This is done using Workflows and Tasks tiles.

A project can have different processes throughout its lifetime. Adobe Experience Manager Projects uses the Adobe Experience Manager workflow engine to define and manage these processes. Based on the project configuration, the affected user is notified to complete a task in the project.

### **Completing tasks assigned to a project**

The Tasks tile indicates the status of the project's tasks and to work on assignments. Workflow tasks are assigned based on the project's roles. This relates to the users you set up earlier.

The list includes assignments to the current user and to all other team members, and promotes project transparency. This differs from the Inbox, which just shows the current user's assignments and notifications.



Perform **Task 5: Create a project, add members, assign a workflow, and perform the tasks**, from the Lab Activity section.

## Making Projects Inactive

Projects can be active or inactive. When a project is complete, you can switch it to an inactive state so your UI does not look cluttered.

To make the project inactive:

1. Navigate to the **Projects** console.
2. Select the project you want to deactivate.
3. Click **View Properties** from the actions bar. The **Project Properties** screen appears.

The screenshot shows the 'Projects' console interface. At the top, there are buttons for 'View Properties' (highlighted with a red box) and 'Delete Project'. A status indicator '1 selected X' is also present. Below the header, there's a search bar and a filter icon. The main area displays two project cards. The first card, 'Geometrixx Outdoors', features a photo of a person walking on a log over water, with a checkmark icon overlaid. The second card, 'Geometrixx Shapes', shows a person working on a laptop. Both cards have their names and descriptions below them.

4. In the **Project Properties** screen, below the **Project Status** title, click on the left side of the slider button to turn the status to **Inactive**.
5. Click **Save**. **Success! The form has been submitted successfully** message appears, and then click **Close**.

The screenshot shows the 'Project Properties' dialog box. At the top right are 'Close' and 'Save' buttons, with 'Save' highlighted by a red box. The main area is titled 'Project Properties'. It contains several sections: 'Project Status' (with a slider icon highlighted by a red box), 'Due Date' (a date input field), 'User' (a dropdown menu), 'Members' (a table listing 'Aaron McDonald' and 'Administrator'). Each member row has a delete icon on the right.

6. Navigate to the **Projects** console; notice that the inactive project is no longer in the list.

The screenshot shows the Adobe Experience Manager Projects interface. At the top, there's a header with the AEM logo, search, help, and user icons. Below the header, the word "Projects" is centered above a grid of three items. Each item has a thumbnail image, a title, and a subtitle. The first item is "Geometrixx Shapes" (Services and Solutions), the second is "Geometrixx Media" (Digital Magazine), and the third is "Geometrixx Gov" (Government Benefits and Services). All three items have a small red dot in the top right corner of their thumbnails.

Project	Description
Geometrixx Shapes	Services and Solutions
Geometrixx Media	Digital Magazine
Geometrixx Gov	Government Benefits and Services

7. Click the **Toggle Active Projects** icon to see inactive projects. This shows inactive projects.

This screenshot shows the same AEM Projects interface, but the "Toggle Active Projects" icon (a red square with a white switch icon) is highlighted with a red box. Only one project, "Geometrixx Outdoors" (Experience-Driven Commerce), is visible. It has a small red dot in the top right corner of its thumbnail. The other two projects from the previous screenshot are no longer visible.

Project	Description
Geometrixx Outdoors	Experience-Driven Commerce

To activate the projects:

1. Ensure you are in **Projects** console, click **Toggle Active Projects** icon from the actions bar.

The screenshot shows the Adobe Experience Manager Projects console. At the top, there is a header with the AEM logo, search, help, and user icons. Below the header, the word "Projects" is displayed. To the right of "Projects" is a blue button labeled "Create". Above the main content area is a toolbar with several icons, one of which is highlighted with a red box. The main content area displays a single project card. The card features a thumbnail image of a person walking on a log over water, with the text "inActive" overlaid. Below the thumbnail, the project name "Geometrixx Outdoors" and the tagline "Experience-Driven Commerce" are visible. On the far right of the card, there is a vertical scroll bar.

2. Select the project that needs to be activated, and then click **View Properties**.

The screenshot shows the Adobe Experience Manager Projects console with the "View Properties" dialog open. At the top of the dialog, there are three buttons: "View Properties" (which is highlighted with a red box), "Delete Project", and "1 selected X". Below the buttons, the "Projects" header and toolbar are visible. The main content area shows the same project card as the previous screenshot, but with a large white checkmark icon overlaid on the thumbnail image. The project name "Geometrixx Outdoors" and tagline "Experience-Driven Commerce" are also present below the thumbnail.

3. In **Project Properties** screen, below **Project Status** field, click on the right side of the slider button to change the status to **Active**.
4. Click **Save**. The **form has been submitted successfully** message appears, and then click **Close**.

The screenshot shows the 'Project Properties' dialog box. At the top right are 'Close' and 'Save' buttons, with 'Save' highlighted in blue. Below is a 'Project Status' field with a slider button, which is currently set to 'Inactive' (indicated by a red box). There is also an information icon (i) next to it. The 'Due Date' field contains a date input and a calendar icon. The 'User' section includes a dropdown menu, an 'Owners' dropdown, and an 'Add' button. The 'Members' section lists two users: 'Aaron McDonald' (aaron.mcdonald@mailinator.com) with the role 'Owners' and a delete icon, and 'Administrator' with the role 'Owners' and a delete icon.

5. Navigate to the **Projects** console; notice that the project is available in the list.

The screenshot shows the 'Projects' console in Adobe Experience Manager. At the top is a header with the AEM logo, search, help, and user icons. Below is a 'Create' button. The main area displays two project cards: 'Geometrixx Outdoors' (Experience-Driven Commerce) and 'Geometrixx Shapes' (Services and Solutions). Each card features a thumbnail image, the project name, and a brief description.

# Managing the Taxonomy

Tags are a quick and easy method of classifying content within a website. Tags may be thought of as keywords or labels that you can attach to a page, an asset, or other content to maximize searches to find the related content.

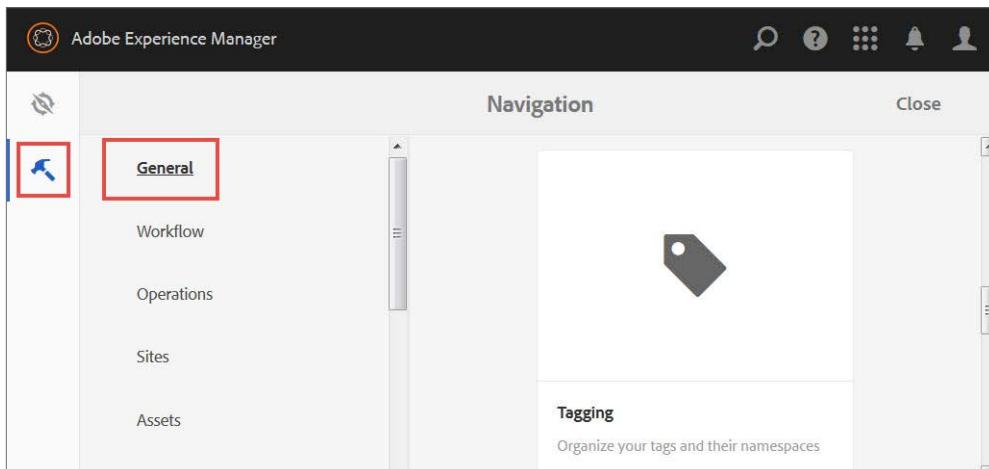
In Adobe Experience Manager, a tag can be a property of:

- a content node for a page.
- a metadata node for an asset.

## Tagging Console

In Adobe Experience Manager, the Tagging console is used to create and manage tags and their taxonomies. One goal is to avoid many tags that are similar.

Tags are managed by grouping them into namespaces, reviewing usage of existing tags before creating new ones, and without disconnecting the tag from currently referenced content.



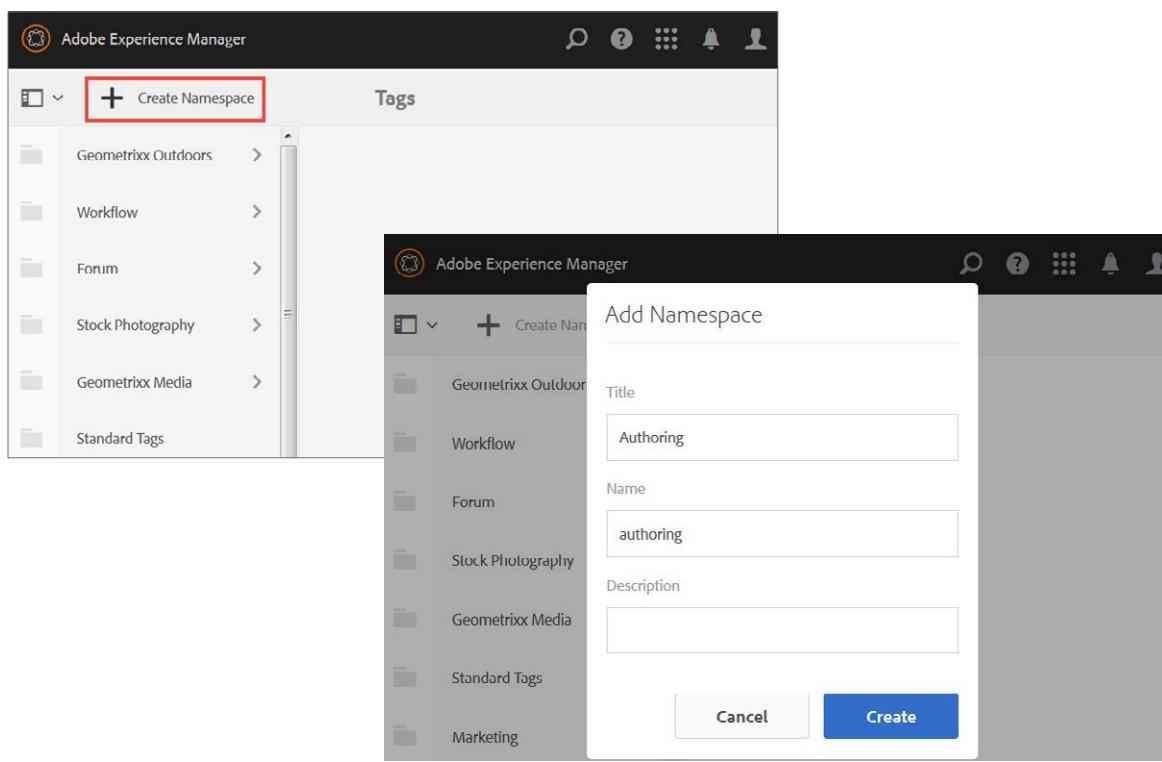
To access the Tagging console, from rail, select **Tools > General** section.

Tagging console allows you to:

- **Create Namespace**—for grouping all the tags. The namespace is itself a tag, and should not contain any sub-tags. However, to continue creating a taxonomy, you can create sub-tags, which in turn may be either lead tags or container tags.

To create namespaces:

1. Click **Create Namespace**.
2. Add a **Title** (required field), **Name** (auto-generated), and **Description** (if needed) for the namespace, and then click **Create**.



3. When you click the right arrow of a namespace, you will view a list of child tags.

The screenshot shows the Adobe Experience Manager Authoring interface. On the left, there is a sidebar with a list of namespaces: Geometrixx Outdoors, Workflow, Forum, Stock Photography, We.Retail, Geometrixx Media, Standard Tags, Marketing, and Authoring. The 'Authoring' namespace is currently selected. To the right of the sidebar, under the 'Authoring' namespace, are three child tags: Company, Student, and Author. A red box highlights the list of child tags.

## Actions on Tags

You can perform the following on tags:

The screenshot shows the Adobe Experience Manager Tags interface. At the top, there is a toolbar with buttons for Create Tag, Edit, Move, Merge, Publish, and a three-dot menu. Below the toolbar, a message says '1 selected X'. In the main area, there is a table with a single row for the tag 'Geometrixx Outdoors'. The table columns are Name, Modified, and Modified By. The Name column shows 'geometrixx-outdoors', the Modified column shows '14 minutes ago', and the Modified By column shows 'Administrator'. To the left of the table, there is a checkbox next to 'Geometrixx Outdoors'. On the right side of the table, there is a context menu with two options: 'Unpublish' and 'Delete'. A red box highlights the 'Delete' option. At the bottom of the interface, there is a button labeled 'Show Tag References'.

Let's look at each of the actions in detail.

- **Properties and References**

To view the **Properties** and **References** of a namespace:

- Select the **Namespace**, and then click the left rail. A drop-down with **Properties** and **References** appear.

The screenshot shows the 'Tags' list in the Adobe Experience Manager interface. At the top, there are several action buttons: 'Create Tag', 'Edit', 'Move', and a 'More' button. Below these, a dropdown menu is open, showing 'Content Only' (selected), 'Properties', and 'References'. The main list contains items like 'outdoors', 'Stock Photography', and '304 Show Tag References'. To the right of the list, there is a column with details for the selected item ('geometrixx-outdoors'): Name, Modified (14 minutes ago), Modified By (Administrator), and a 'Show Tag References' button.

- Select **Properties**, to view information such as name, time of last edit, and number of references. This information displays in a column to the left of the tag columns.

The screenshot shows the 'Properties' view for the 'geometrixx-outdoors' tag. At the top, there are action buttons: 'Create Tag', 'Edit', 'Move', 'Merge', 'Publish', 'Unpublish', and a 'More' button. Below these, a dropdown menu is open, showing 'Properties' (selected) and 'Show Tag References'. On the left, a table displays properties: NAME (geometrixx-outdoors), MODIFIED (15 hours ago), and MODIFIED BY (admin). On the right, the 'Tags' list is shown, with the 'geometrixx-outdoors' tag selected. A red box highlights the 'Name' and 'Modified' information in the properties table, and another red box highlights the 'Show Tag References' button.

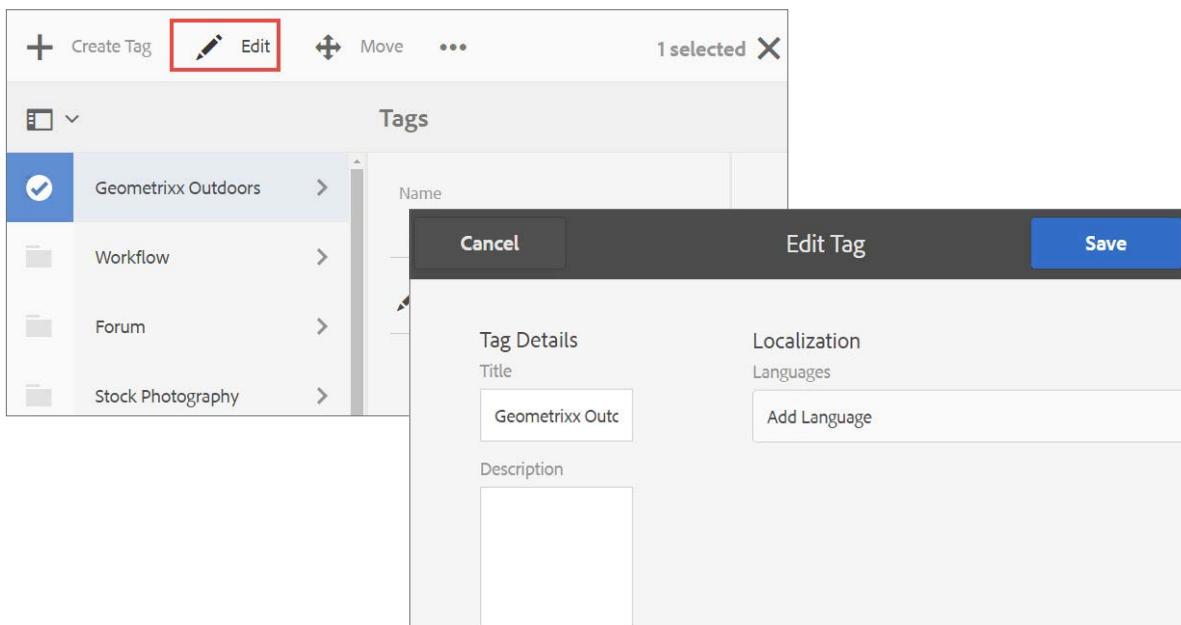
ii. Select **References** to identify when a tag has been applied. The initial display is a count of tags applied. By clicking the arrow to the right of the count, the reference names are listed.

The screenshot displays two separate tag management interfaces. The top interface shows a summary of '1 selected' tags, with a 'References' dropdown menu open. A red box highlights the 'Tag References (304)' option under 'TAG REFERENCES'. The bottom interface shows a detailed list of references. A red box highlights the first item in the list, 'jola-summer-surfing'. Both interfaces include standard navigation buttons like 'Create Tag', 'Edit', 'Move', and a three-dot menu.

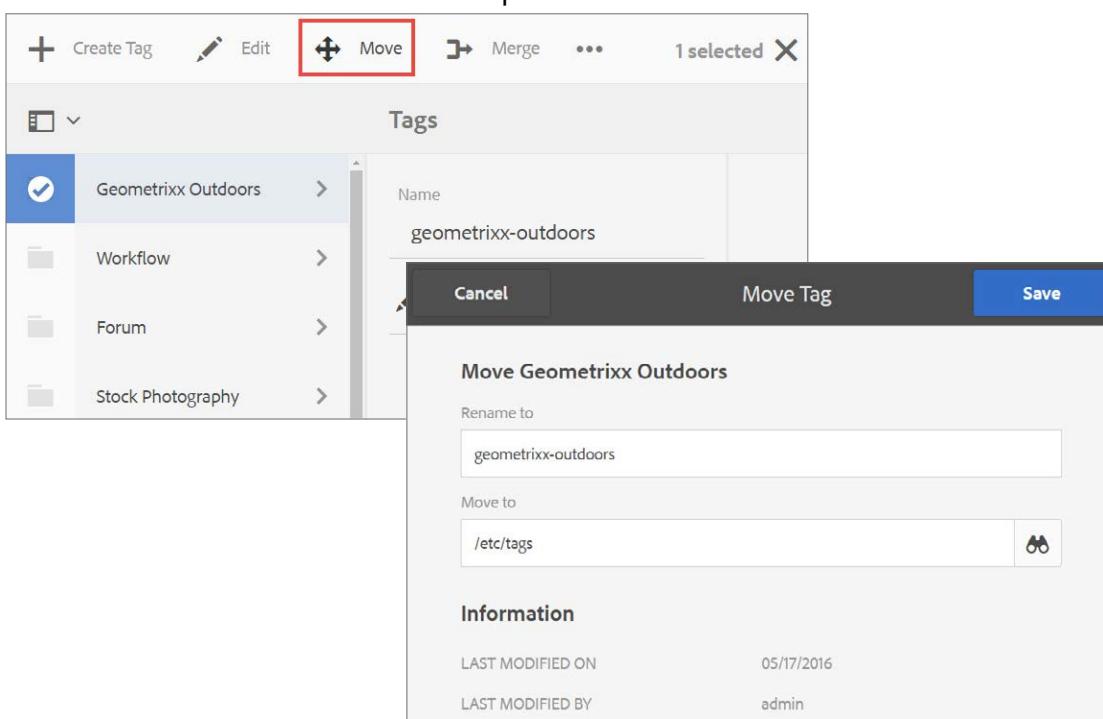
- **Create Tag**—adds a child tag for the current tag. After you create a namespace, you can create tags in it to group them within the namespace.
  - a. Add a **Title** (required field), **Name** (auto-generated), and **Description** (if needed) for the tag, and then click **Create**.

The screenshot shows the 'Add Tag' dialog box overlaid on a main tag management interface. The dialog box has fields for 'Title' (containing 'Students', highlighted with a red box), 'Name' (containing 'students'), and 'Description'. At the bottom are 'Cancel' and 'Create' buttons. In the background, the main interface shows a list of tags under a namespace named 'Geometrixx Outdoors', with a red box highlighting the 'Create Tag' button.

- **Edit**—allows you to alter the **Title** and **Description**, and provide localizations of the **Title**.



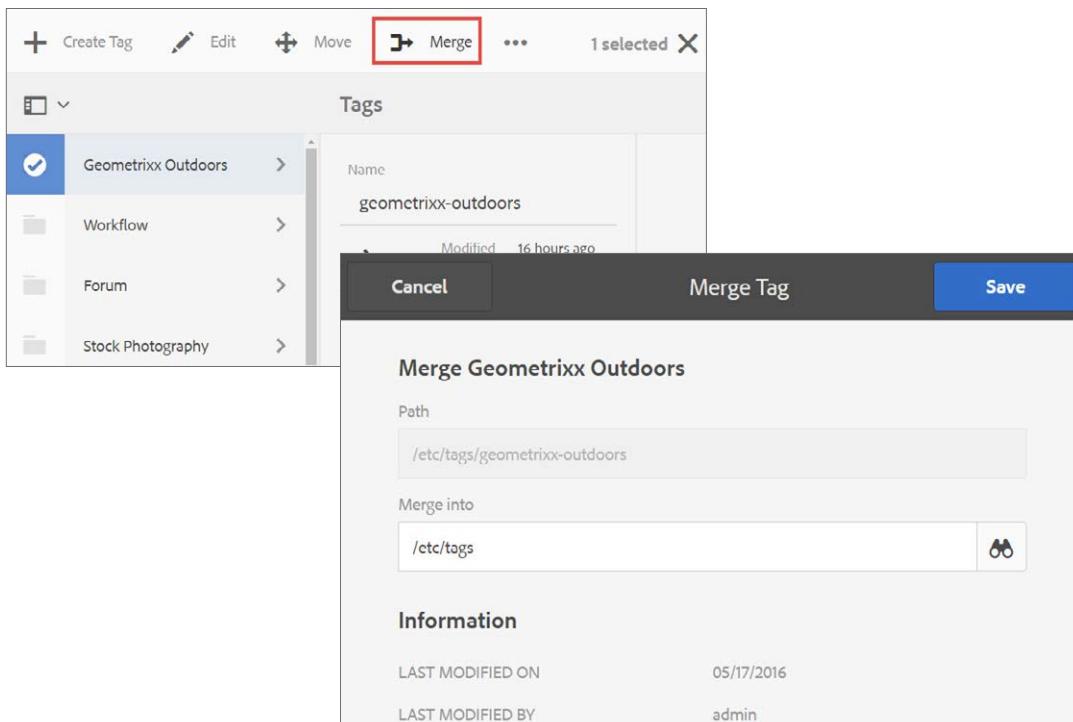
- **Move**—allows Tag Administrators and Developers to clean up the taxonomy by moving the tag to a new location or renaming it. If the selected tag is a container tag, moving the tag will move all child tags as well.
  - In the **Move Tag** dialog box, you must specify the following values:
    - Rename to:** Initially, displays the current name of the tag. You can enter a new name.
    - Move to:** Browse to the new path.



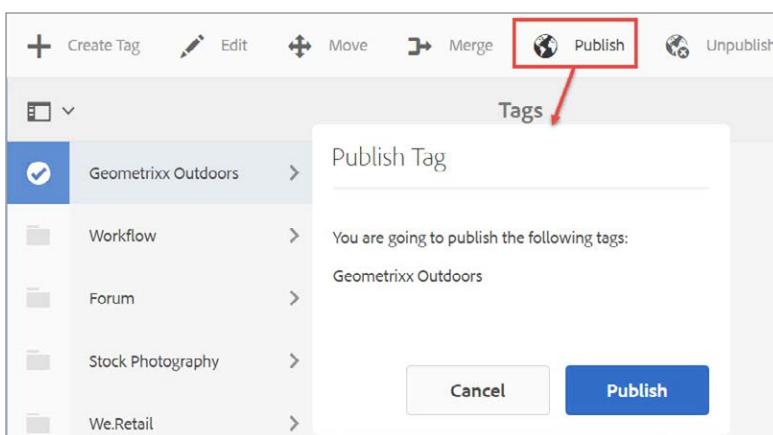


**NOTE:** It is recommended that authors be allowed only to edit the tag's title, not to move or rename tags.

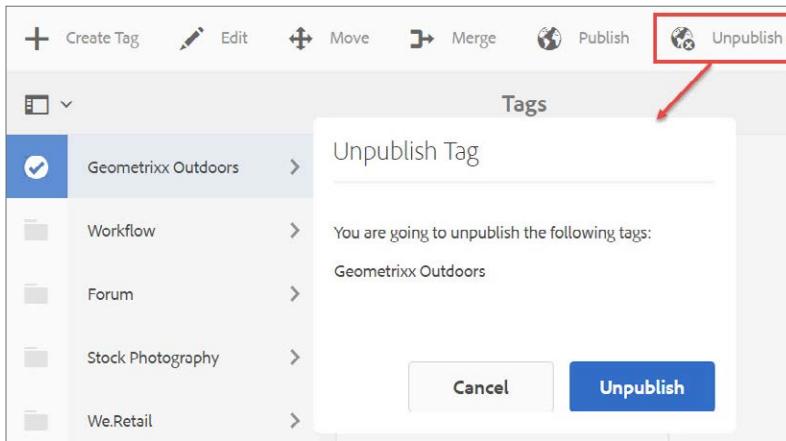
- **Merge**—used when a taxonomy has duplicates. When tag A is merged into tag B, all the pages tagged with tag A will be tagged with tag B and tag A is no longer available to authors.
  - › In **Merge Tag** dialog box, you need to specify the following values:
    - i. Path (read-only): The path of the tag selected to be merged into another tag.
    - ii. Merge into: Browse to select the path of the tag to merge into.



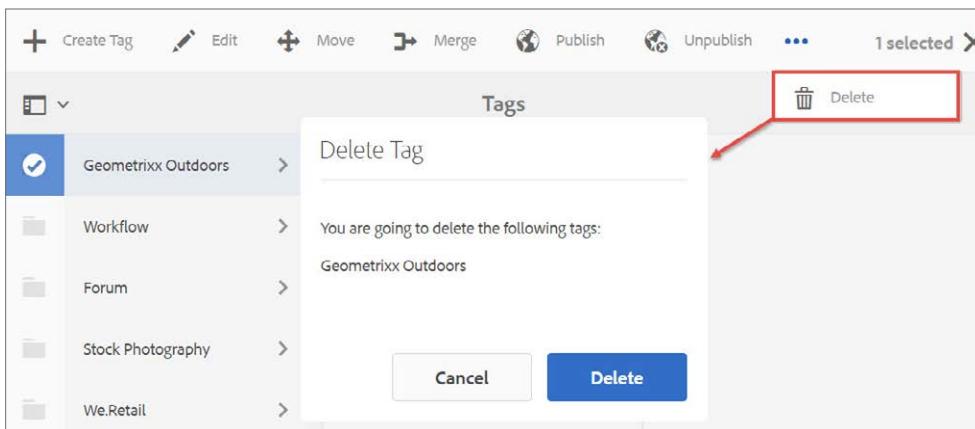
- **Publish**—activates the tag in the publish environment. Similar to page content, only the selected tag is published, regardless of whether it is a container tag or not.



- **Unpublish**—deactivates the tag in the author environment and removes it from the publish environment.
  - › If the selected tag is a container tag, all of its child tags will be deactivated in the author environment and removed from the publish environment.

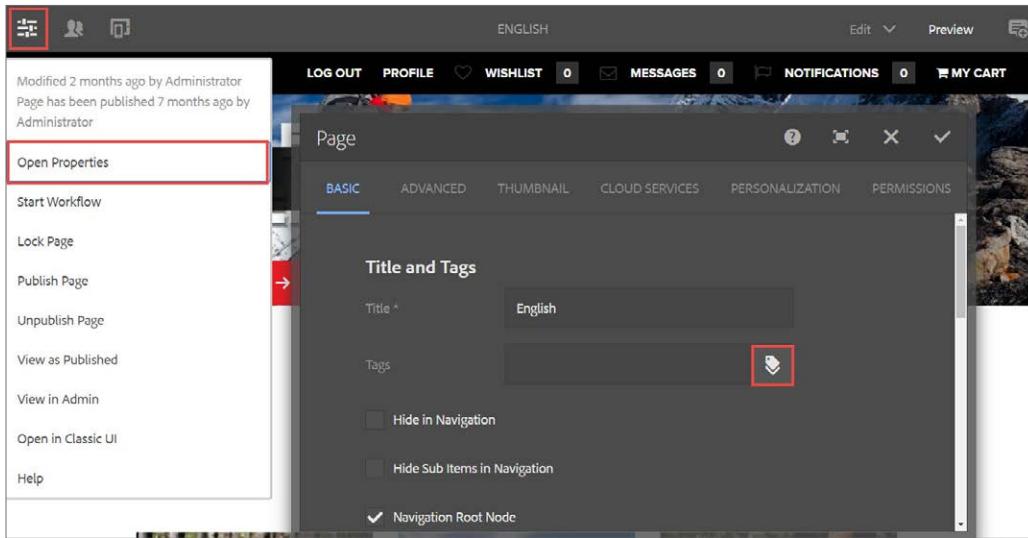


- **Delete**—to permanently remove the tag from the author environment.
  - › If the tag was published, it is also removed from the publish environment. If the selected tag is a container tag, all of its child tags will be removed as well.



## Adding Tags to Pages

In the author environment, you may apply tags by accessing the page properties and entering one or more tags in the Tags/Keywords field. Adding tags to pages makes it easier to search for related content.



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 **NOTE:** When you use tags on your page, the Title property is displayed. The tag Name is the internal handler of the tag and may not include spaces or special characters.

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 Perform **Task 6: Create a namespace, add tags, and apply tags to pages**, from the Lab Activity section.

## Tag Cloud

Tag clouds show a “cloud” of tags, either for the current page, the entire website, or those most commonly accessed.

The size of different tags is based on the volume of user visits to the appropriate webpages.

Components

Filter

All

GENERAL Slideshow

GENERAL Table

GENERAL Tag Cloud

ENGLISH

Edit Preview

\$119.00 \$54.00

JOIN OUR COMMUNITY

Drag components here

Biking Business Business People Coat coat Color Equipment Footwear Glasses Gloves Hat Helmet Hiking Hiking Illustrations Vectors Landscape Men Men Other Pants Portrait Product Running Scarf Services Shirt Shirt Shorts Shorts Skiing Square Summer Summer Surfing Surfing Swimming Swimming Vector Icons wcm Winter Winter Women women

## Modeling Tags

- Organization: Tags are powerful organizers. With the ability to create tags and sub-tags, it becomes possible to express entire taxonomic systems, covering terms, sub terms, and their relationships.
- Namespaces: You can create namespaces to sort and organize your tags. With namespaces, you can create categories of tags to make sure that tags that belong together are grouped together.
- Unique: The only restriction for newly created tags is they must be unique within a specific namespace.
- Accessibility: Authors and site visitors can apply tags. Regardless of their creator, all forms of tags are made available for selection, both when assigning to a page, and when searching.
- Targeted content: Tags are also used by the teaser component, which monitors a user's tag cloud to provide targeted content.
- Packaging: Tagging is an important aspect of your content; make sure to package tags with the pages that use them.
- Search: Tags improve your search experience. You can search for tags and content that has tags. The default search component in Adobe Experience Manager uses these mechanisms, so you can narrow the results down to those that are relevant.

# Lab Activity

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## Scenario

XYZ organization caters to the Media and Entertainment industry. The organization is in the process of fine-tuning their Web Content Management (WCM) and wants to include organizational nuances and effective approval cycles.

### 5.2 Challenge

- Creating an editable template to have intuitive and flexible page structure
- Creating and using content fragments to optimize your content according to the specific channel.
- Creating an efficient workflow model reflecting the business processes.
- Developing content for future releases.
- Creating and managing projects in your WCM to ensure that the tasks in your project life cycle are completed as expected.
- Creating and managing tags to provide seamless search functionality embedded in the website.

## Overview

To complete the challenge, you need to:

- Create an editable template
- Create a workflow model to automate the publishing process.
- Create launches to promote the content to the source before publishing.
- Create projects to build a team, give access to all the team members to resources, workflows and tasks, allowing them to work on a common goal.
- Create and manage tags to provide quick and easy method of classifying content within a website.

## Pre-requisites

You should have performed the Adobe Experience Manager installation steps, and have running Author and Publish instances.

## Steps



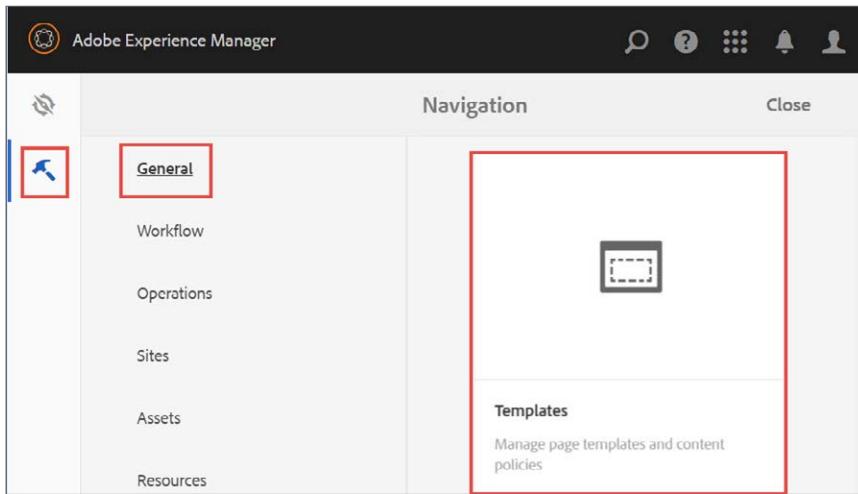
### Task 1: Create, edit, and use a template to create a page

You will perform the following:

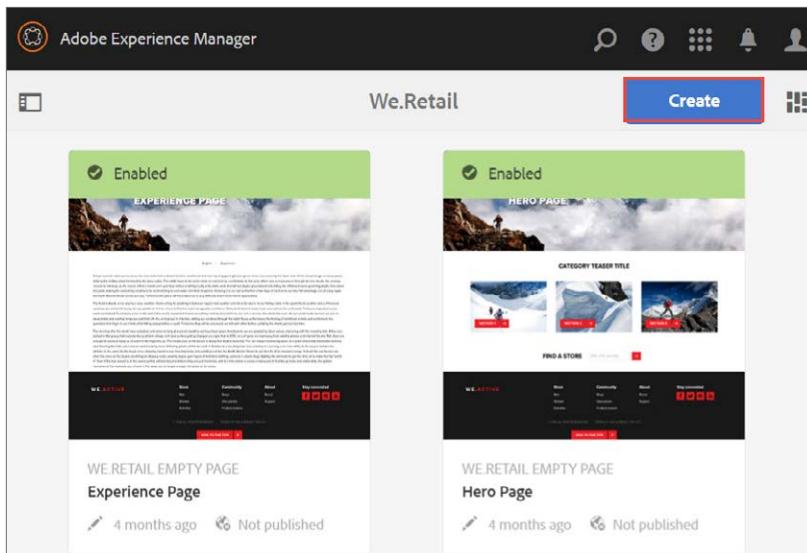
1. Creating a template with a page header and footer, a title and a paragraph system where page authors will be free to drop any allowed components.
2. Enabling the template, creating a new page using the enabled template, and editing the page.
3. Editing the template structure, and defining the initial content for the template.
4. Defining the responsive layout of the template.

To create a template:

1. Navigate to the **Templates** console from **Tools > General** section.



2. Open the **We.Retail** folder where you'll see some existing templates.



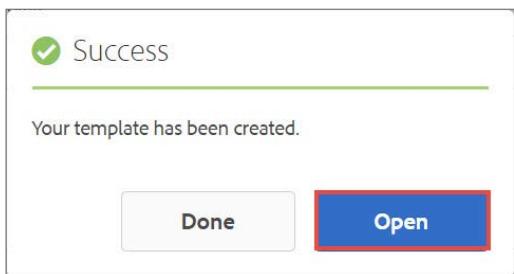
- Click the **Create** button (on the top right).

- Select the **We.Retail Empty Page** template and click **Next**.

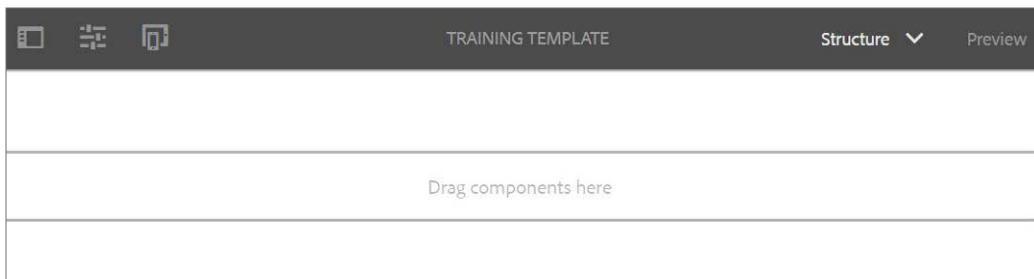
- Enter **Training Template\_<username>** as template Title and click **Create**.

 **NOTE:** It is important to create your template with a unique identifier so you can identify your template amongst those of your peers' pages being created in the same environment.

6. Click **Open** from the **Success** message.



7. You now see a completely blank template, which we are going to fill to define how the pages created from it should be composed out of the available components.

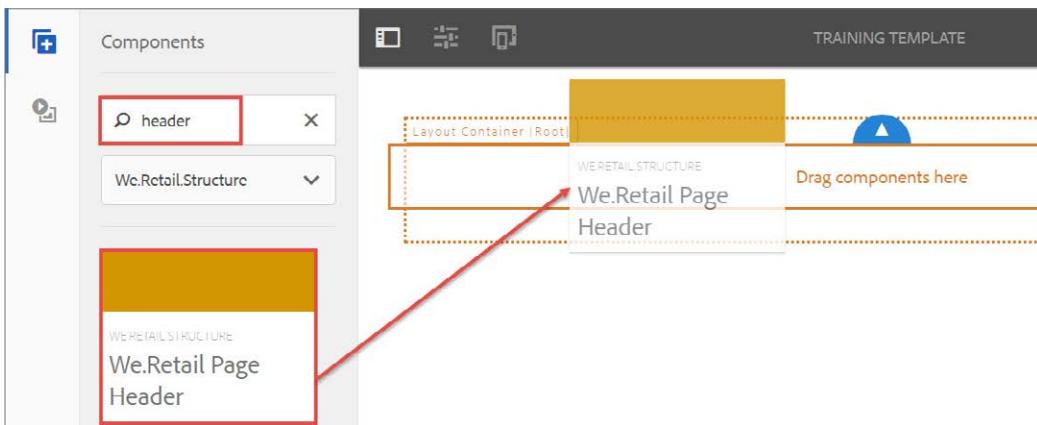


Let's add the page header and footer, and a title component.

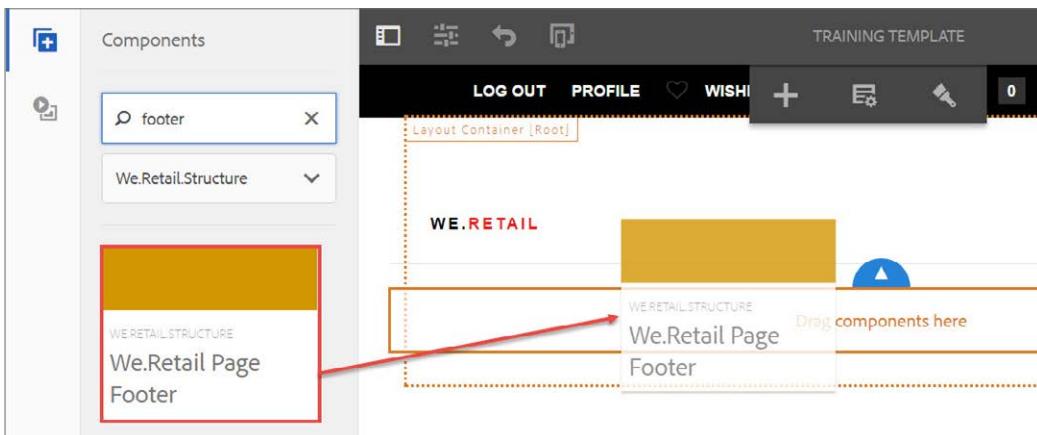
8. In Components browser, select **We.Retail.Structure** group from All drop-down.

A screenshot of the Components browser. On the left, there's a sidebar with a '+' icon, a 'Components' tab (which is highlighted with a red box), and a 'Filter' input field. A dropdown menu labeled 'All' is also highlighted with a red box. The main panel shows a list of component groups: 'All', 'We.Retail' (with 'We.Retail.Structure' highlighted with a blue box), and 'General'. To the right of the browser is the 'TRAINING TEMPLATE' interface, showing the 'Drag components here' placeholder.

9. Look for **We.Retail Page Header** component in Filter search field, and then drag and drop it onto the **Drag components here** placeholder.



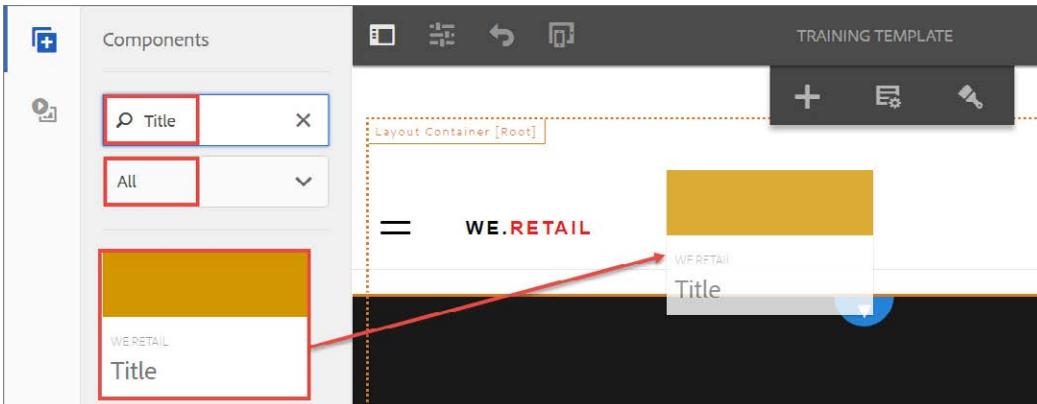
10. The same way, drag a **We.Retail Page Footer** component below the header.



11. Now change the component group drop-down back to **All**.

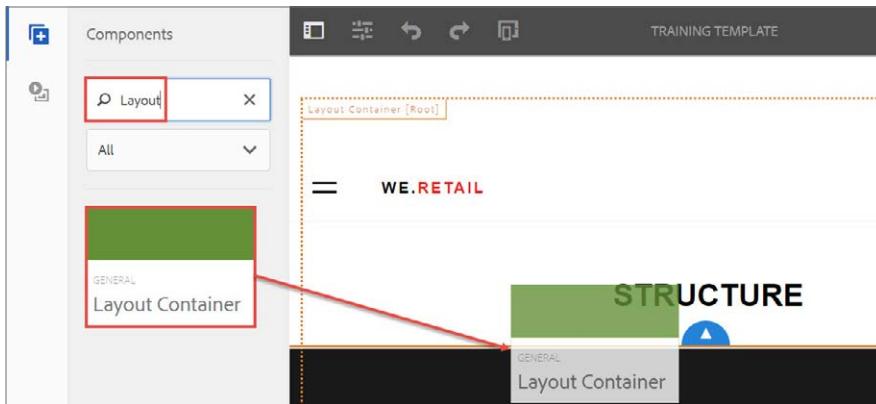
12. In the **Filter** search field type **Title** and hit **Enter**.

13. Drag the **Title** component between the previously added ones.

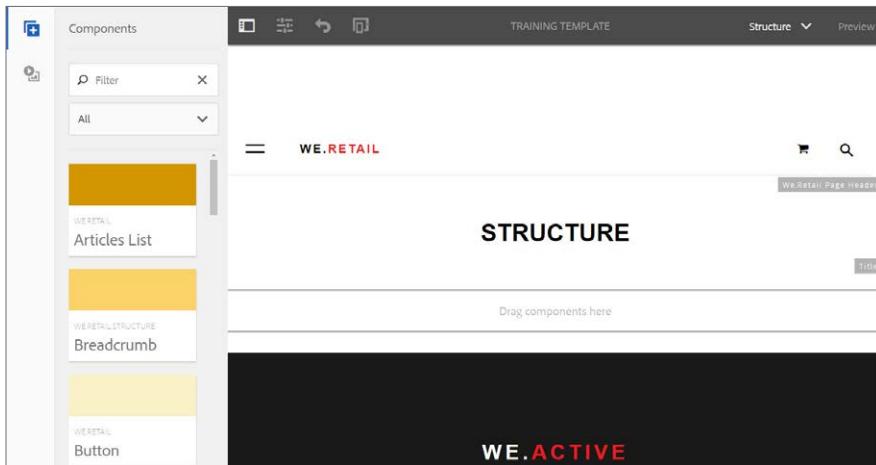


14. In search field, enter **Layout Container** and **Enter**.

15. Drag a **Layout Container** below the **Title**.



You should now have a template that looks as below:



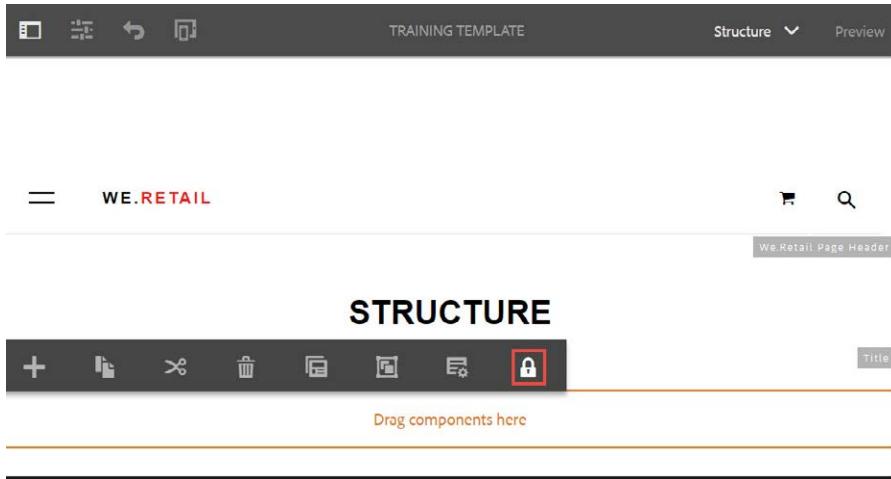
In the template that we created, we don't want the header and the footer to be editable on the resultant pages, because what they display should be determined by their own logic, like building the top-level navigation from the page tree.

Also the title component doesn't necessarily need to be editable, as it will (by default) display the page title. The layout container however needs to be made editable, or it will be a quite pointless in its current state.

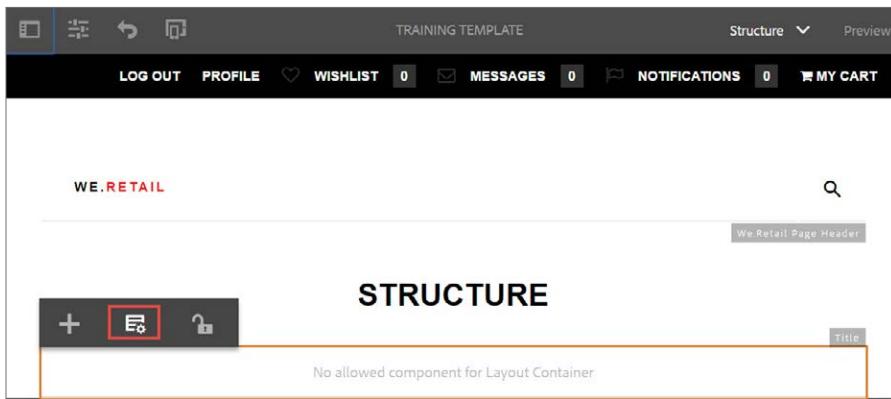
To do so, we will have to unlock it and assign a content policy, so that it has a list of allowed components for the resultant pages.

16. Select the **Layout Container** by clicking on its placeholder which is located below the **Title** component.

17. Click the **lock** icon on the toolbar to unlock it for the resultant pages.

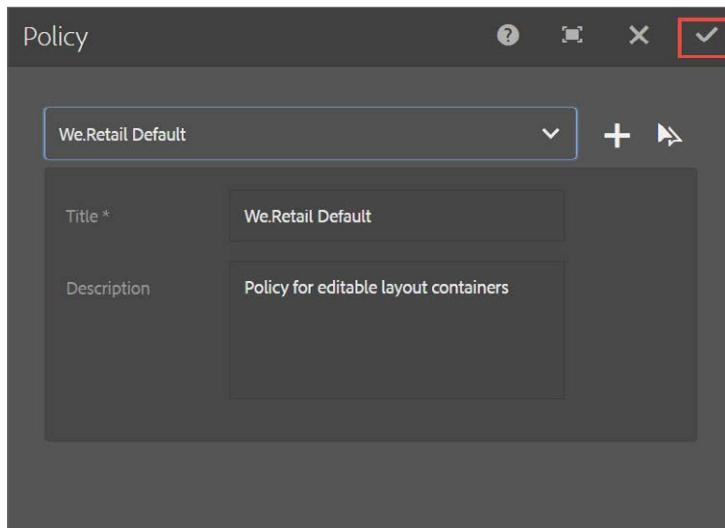


18. Still in the toolbar of the layout container, click the **Policy** icon.



19. In the **New Policy** drop-down select the **We.Retail Default** policy.

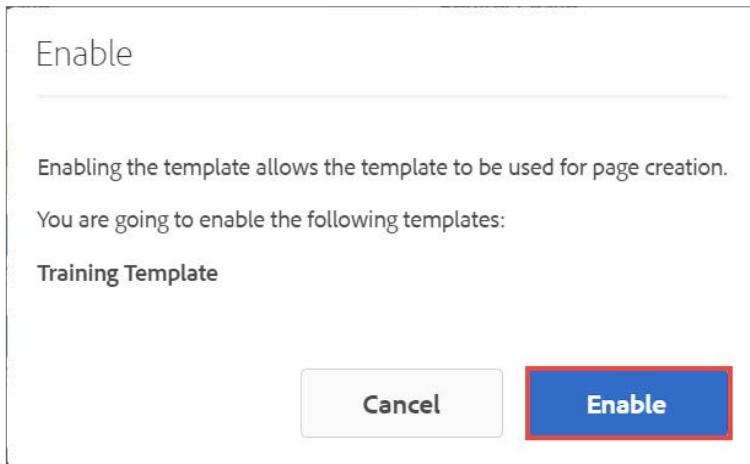
20. Validate by clicking the checkmark (on the top right of the popup dialog)



You just created a new template now let's use this template to create a page. We'll have to first enable the template, so that it is made available to create new pages from it.

21. Go back to the **We.Retail** folder of **Templates** console, where the list of available templates are displayed.

22. On the **Training Template\_<username>** card, click on the three dots and click **Enable**. An Enable dialog opens.

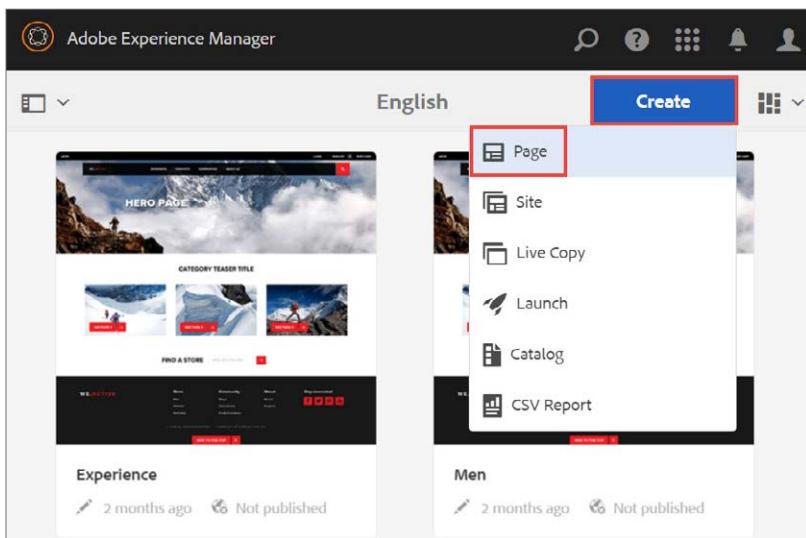


23. In the popup dialog, click **Enable**. Now let's create a page from that template.

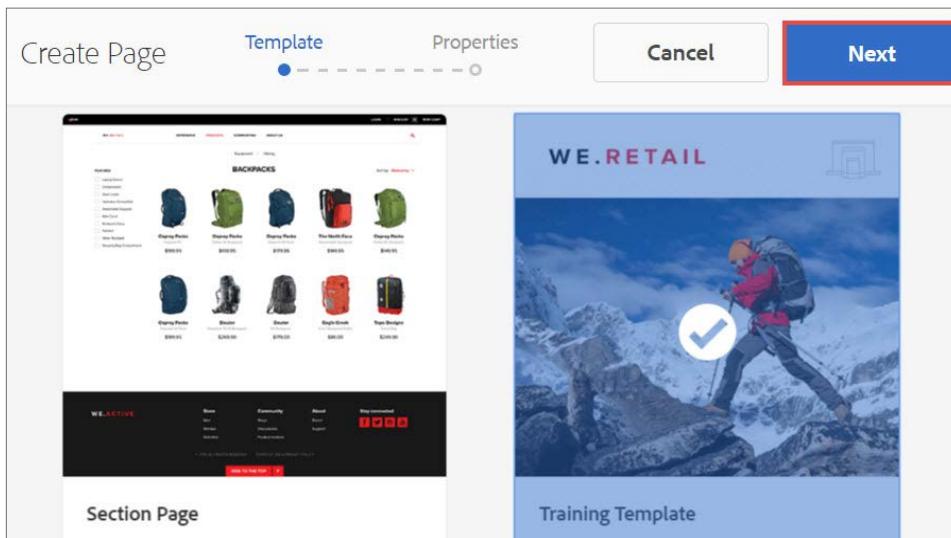
24. Navigate to **We.Retail > Language Masters > English**.

A screenshot of the Adobe Experience Manager interface. The top navigation bar shows "Adobe Experience Manager". Below it, a sidebar has "Language Masters" selected. A dropdown menu is open over the "English" item, showing options: "Language Masters", "We.Retail", and "Sites". The main content area displays two preview cards: "Experience" (last updated 2 months ago, Not published) and "Men" (last updated 2 months ago, Not published). Both cards show a preview of a website with a hero page and category teasers.

25. Click **Create** and select **Page**.



26. Select the **Training Template\_<username>** that we just enabled and click **Next**.



27. Enter Training Page\_<username> as Title and click Create.

Create Page      Template      Properties      Back      **Create**

BASIC      ADVANCED

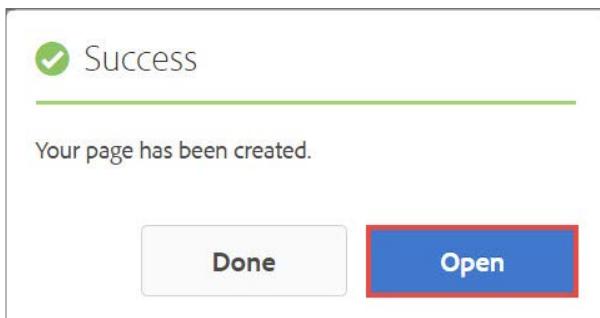
**Title and Tags**

Name

Title \*

Training Page

28. On the Success message click Open.



The newly created page opens in a new tab, let's go ahead and edit it.

TRAINING PAGE      Edit      Preview

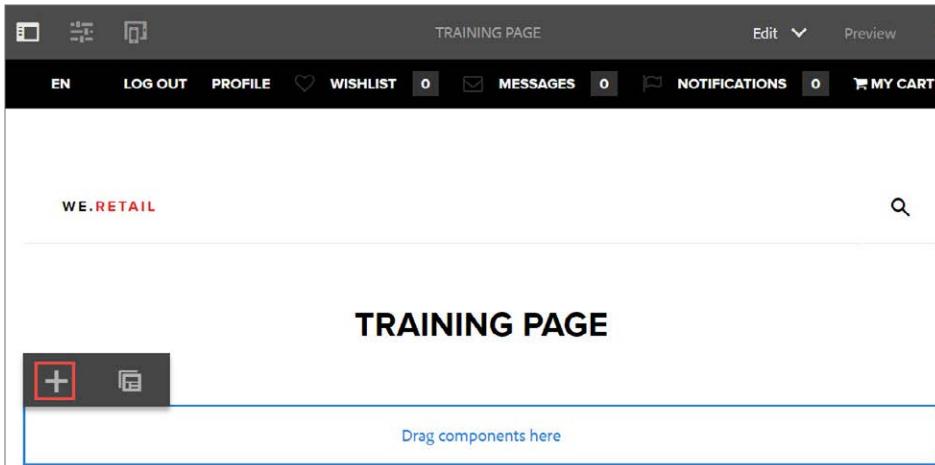
WE.RETAIL

TRAINING PAGE

Drag components here

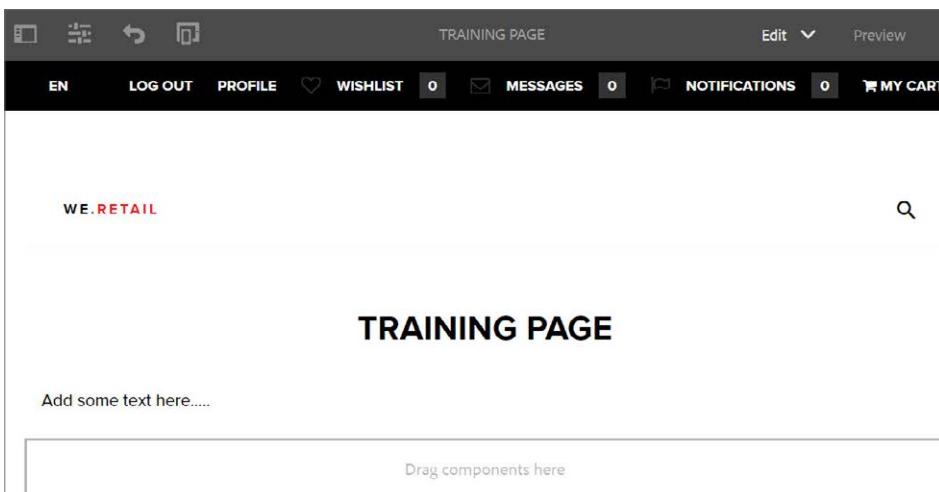
29. In the toolbar, click **Edit** in the top right.

30. See how none of the components in the template is editable, except for the **Layout Container**.



31. Select the placeholder of the **Layout Container** and click **+**.

32. Choose a **Text** component, select it, click the **Edit** icon, and type something.

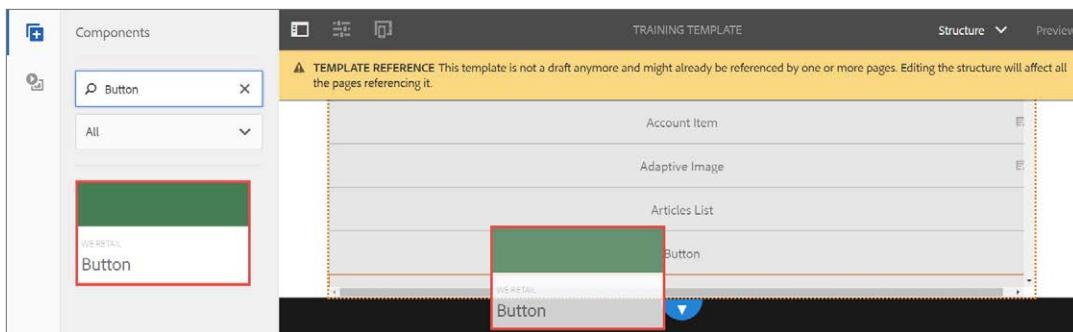


You should now have something that looks the following screenshot:

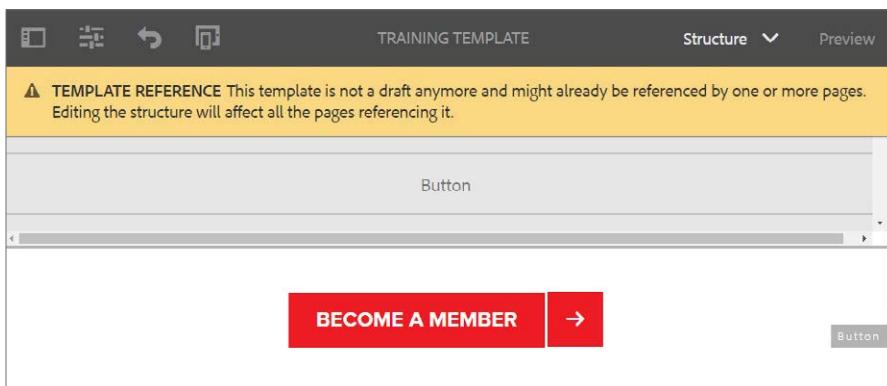
Let's see how editing the template structure will also be reflected on the pages that resulted from it.

33. Open the **Training Template\_<username>** to edit it.

34. Drag and drop a **Button** component between the layout container and the page footer.



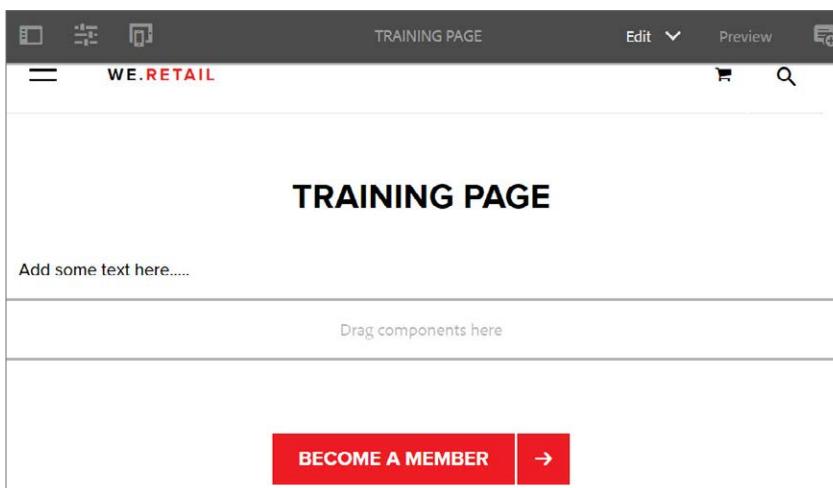
35. Select the added button component and click the **Configure** icon.



36. Enter a button label: **Become a member**.

As the changes are saved, let's see how the resultant page now looks.

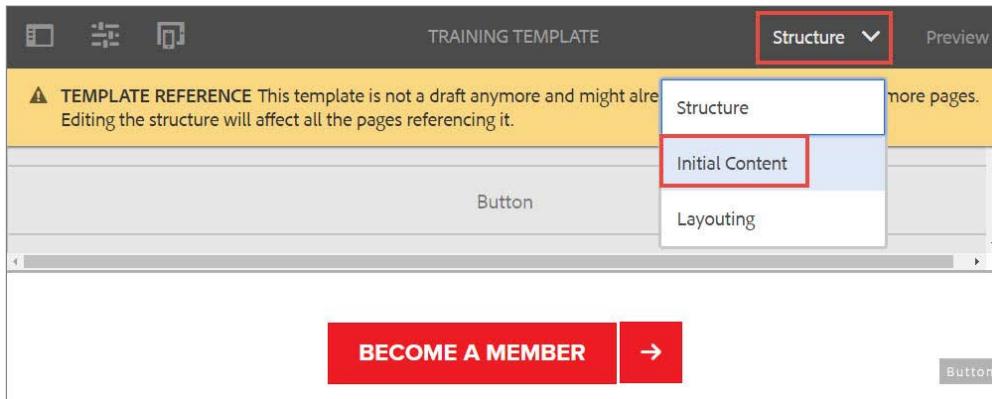
37. Open the **Training Page\_<username>**. Reload the page in the browser.



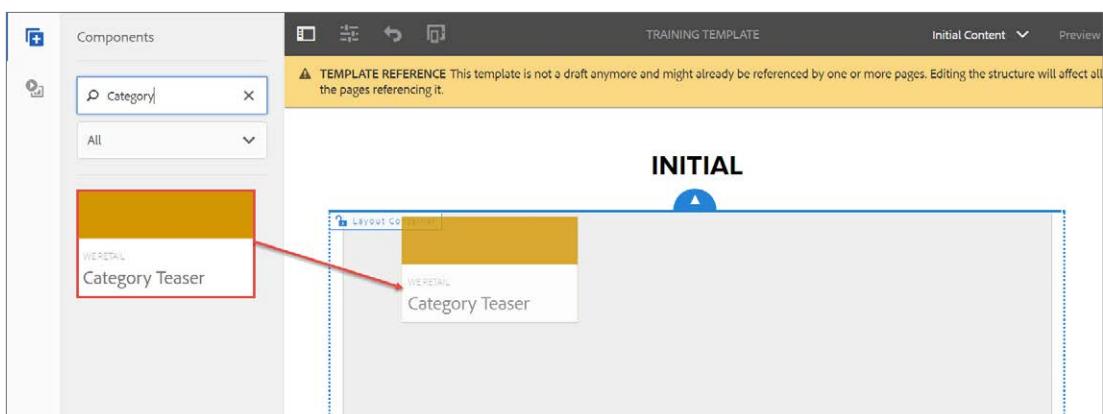
You can see that changes to the structure of a template affect all pages that use it. It is also possible to define initial content for a template, which will be copied over to newly created pages.

38. Open the **Training Template\_<username>**.

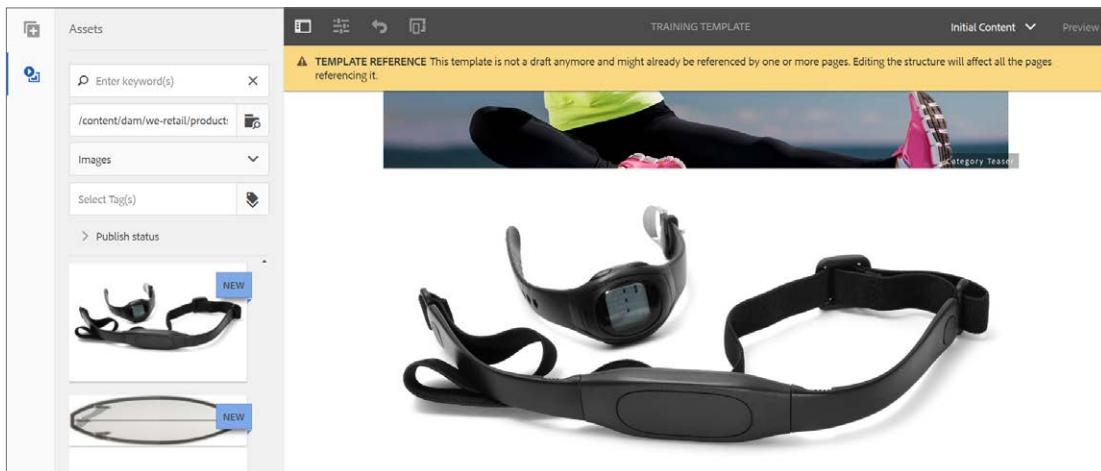
39. Switch to **Initial Content** mode by clicking on the down-arrow next to **Structure**.



40. Drag and drop three instances of **Category Teaser** to the **Layout Container**.

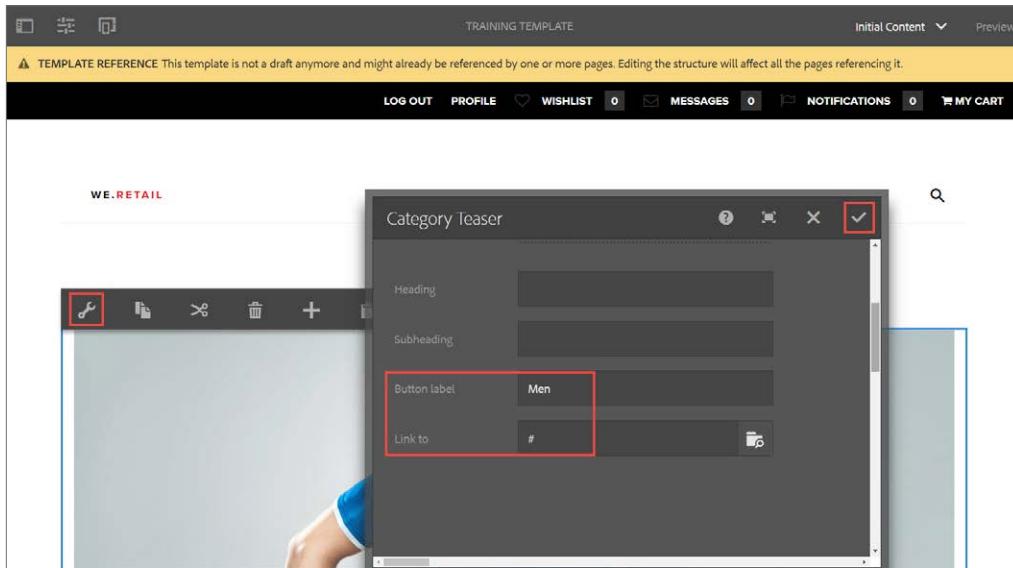


41. Drag and drop an image on each of the Category Teaser component.



42. Optionally, edit each category teaser by clicking the configure icon.

43. Give it a Button Label to make the label to appear; set "#" as dummy value for the link.



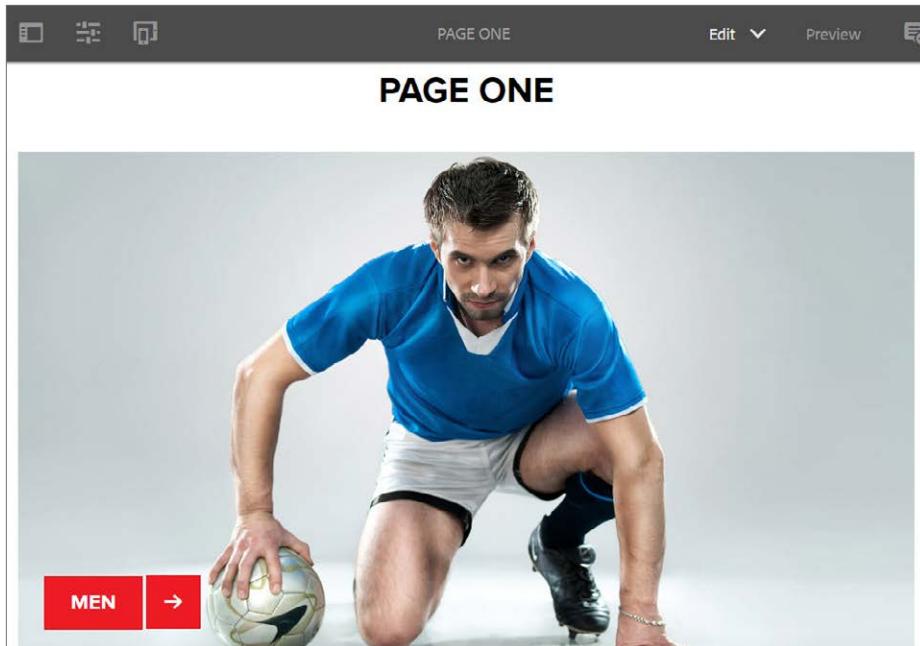
Let's see how a newly created page would now look.

44. Navigate under the **Training Page\_<username>**, click **Create > Page**.

45. Select the **Training Template**, and then click **Next**.

46. Enter **Page One** as **Title**, and click **Create** and then **Open**.

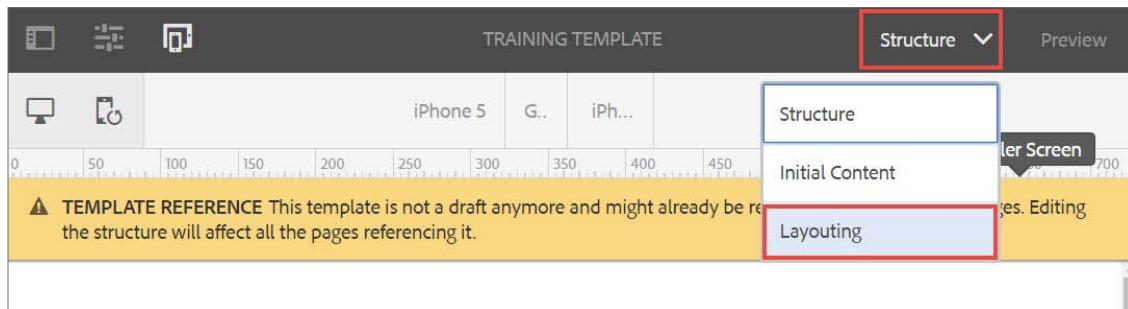
Notice that what we added to the initial content can be edited on the page.



Let's see how to improve the layouting of the template with the layout editor.

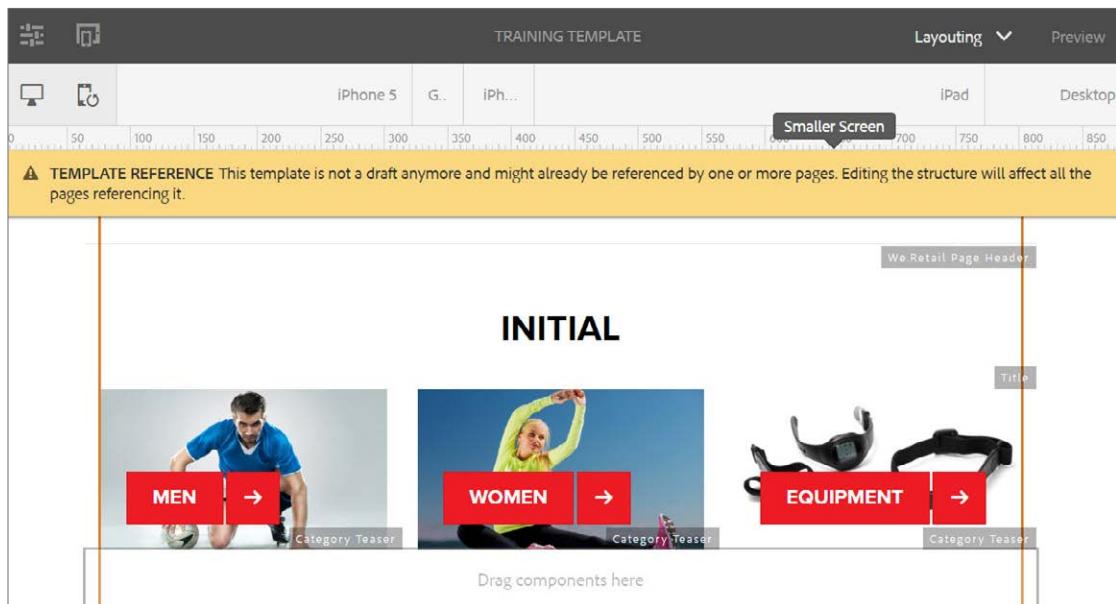
47. Open the **Training Template\_<username>**.

48. Switch to **Layouting** mode by clicking on the down-arrow next to **Structure**.



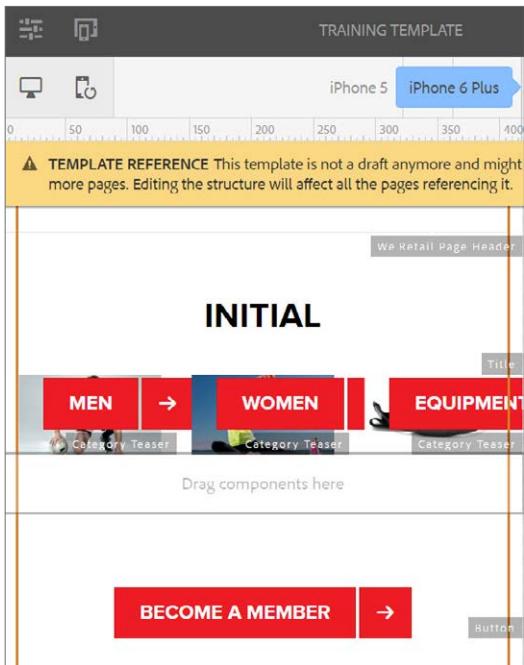
49. Select each of the **Category Teaser** components and drag their side handle to a third of the page.

The page should now look something like the following (also displaying the columns shown when dragging a handle):

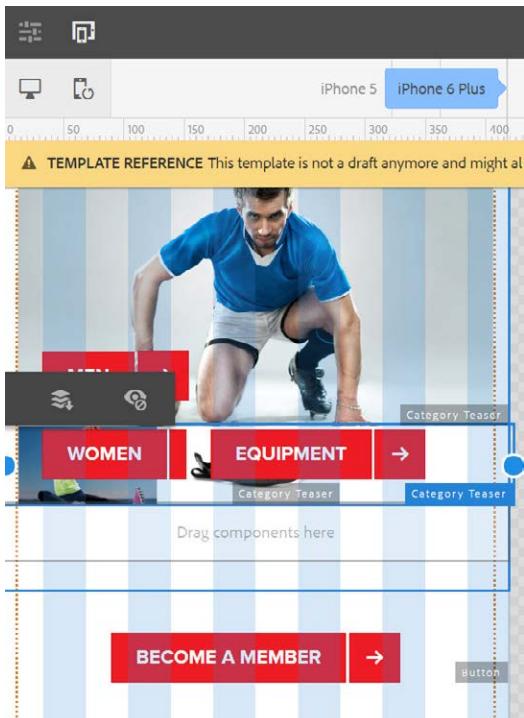


Previewing the template for iPhone clearly shows it needs to be aligned.

50. In the ruler of the mobile emulator (on the top), click on **iPhone**.

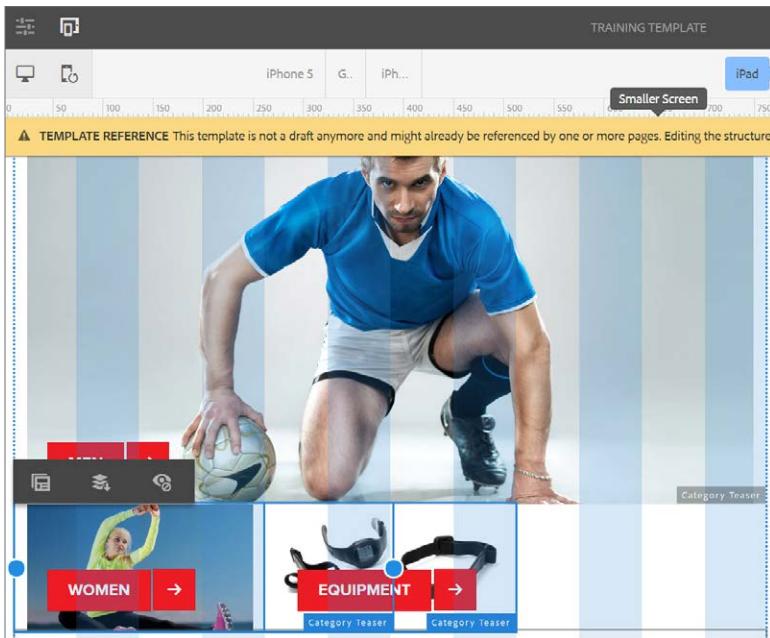


51. Select each of the category teasers and resize them to take the full width (12 columns).

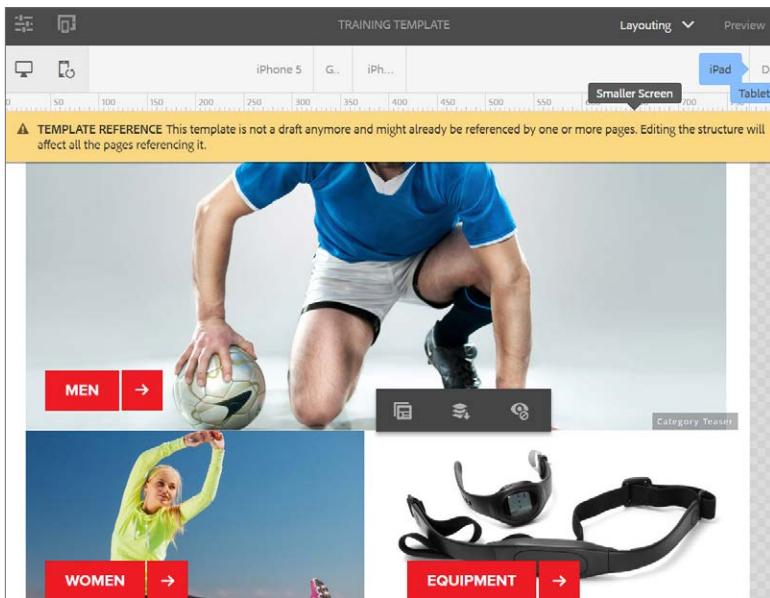


52. In the mobile emulator, now click on iPad.

53. For that breakpoint, take only the first category teaser and resize it to the full width (12 columns).



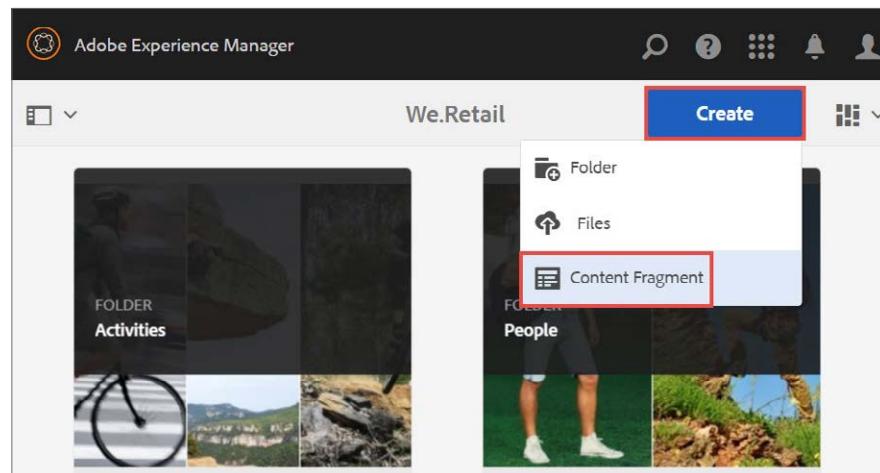
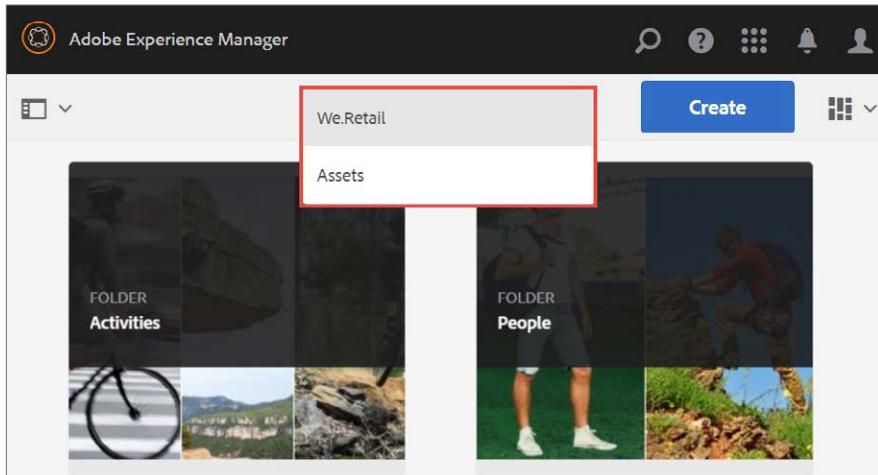
54. Take the next two category teasers and resize them to take the half width (6 columns).



## Task 2: Create, edit, and use a content fragments in a page

To create content fragment:

1. In the **Assets** console navigate to the required folder, for example **We.Retail**.
2. Select **Create > Content Fragment** to open the wizard.



3. In the **Template** step, select the fragment type, then proceed with **Next**.
4. In the **Properties** step specify the Title as **Training CF\_<username>**, and then click **Create**.

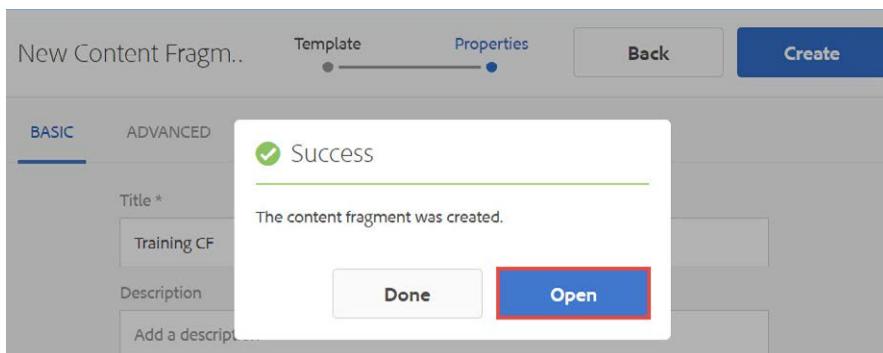
New Content Fragm..      Template      Properties      Back      **Create**

**BASIC**    ADVANCED

Title \* **Training CF**

Description  
Add a description

5. Open for editing the fragment.



To edit your fragment:

6. Open the fragment for editing.

Adobe Experience Manager

**Edit**      Training CF - Main      **✓**

**TOOLS**    VARIATIONS

Rich Text

**B** **I** **U** ¶ **¶** **¶** **¶**

Active variation      Master

Words	0
Characters	0
Characters (with spaces)	2
Sentences	0
Avg. Sentence (words)	0
Avg. Sentence (chars)	0
Paragraphs	1

## 7. Add several paragraphs of text on the fragment editor.

Introduction

Adobe Experience Manager (AEM) content fragments are created and managed as page-independent assets.

They allow you to create channel-neutral content, together with (possibly channel-specific) variations. You can then use these fragments, and their variations, when authoring your content pages.

Components of Content Fragments

Content Fragments have:

- Fragments
- Variations

## 8. Format the content using **Rich Text**, like Bold, add a bulleted list, and so on, and click the checkmark icon to save the changes. You will be taken back to **Assets > We.Retail** folder.

Introduction

Adobe Experience Manager (AEM) content fragments are created and managed as page-independent assets.

They allow you to create channel-neutral content, together with (possibly channel-specific) variations. You can then use these fragments, and their variations, when authoring your content pages.

**Components of Content Fragments**

Content Fragments have:

- Fragments
- Variations
- Elements

Create variation of the fragment, allows you to take the Master content and vary it according to purpose (if required).

9. Open Training CF\_<username>, click VARIATIONS, and then click **Create Variation**.

The screenshot shows the Adobe Experience Manager interface for a content fragment named 'Training CF - Main'. The 'Variations' tab is highlighted with a red box. At the bottom left of the main content area, there is a 'Create Variation' button also highlighted with a red box.

10. Add a **Title**, and then click **Add**.

The screenshot shows the 'New Variation' dialog box. The 'Title' field contains the value 'Terminologies', which is highlighted with a red box. The 'Add' button at the bottom right of the dialog is also highlighted with a red box.

11. You can make changes to the Master. For example; creating only the Components, and deleting other text, and then click the checkmark icon.

The screenshot shows the Adobe Experience Manager interface with the title "Training CF - Main". On the left, there's a sidebar with "TOOLS" and "VARIATIONS" tabs, where "VARIATIONS" is selected. Below it are sections for "Master" and "Terminologies". The main content area displays a list titled "Content Fragments have:" with the following points:

- Fragments: allow you to design, curate, create, and use page-independent assets
- Variations: permutations of the master fragment
- Elements: individual semantic block of content defined in a fragment

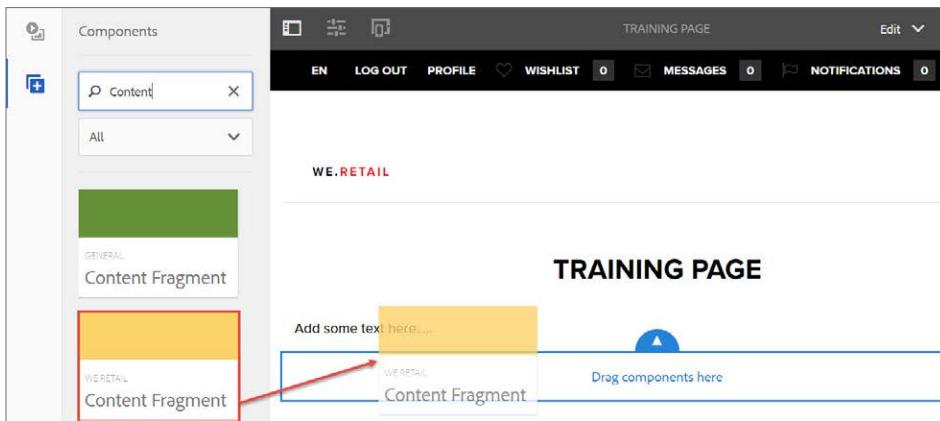
A blue checkmark icon is located in the top right corner of the main content area.

The content fragment and its variations are ready, so let's use it in a page.

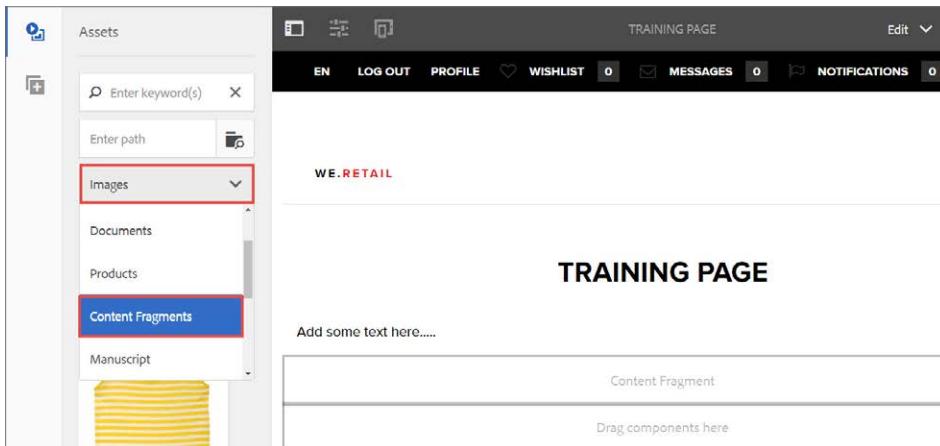
12. Navigate to **Training Page\_<username>** and click **Edit**.

The screenshot shows the Adobe Experience Manager interface with the title "Training Page". The top navigation bar includes "Create", "Edit" (which is highlighted with a red box), "View Properties", "Lock", and "Copy". The main content area shows a preview of the page with the heading "WE.RETAIL" and a background image of a person climbing a snowy mountain. Below the preview, the page details are shown: "Training Page", "1 hour ago", and "Not published". To the right, a modal window titled "English" is open, showing the "Language Masters" section with "We.Retail" and "Sites" listed. A red box highlights this modal window. At the bottom, another section titled "Experience" is shown with "2 months ago" and "Not published".

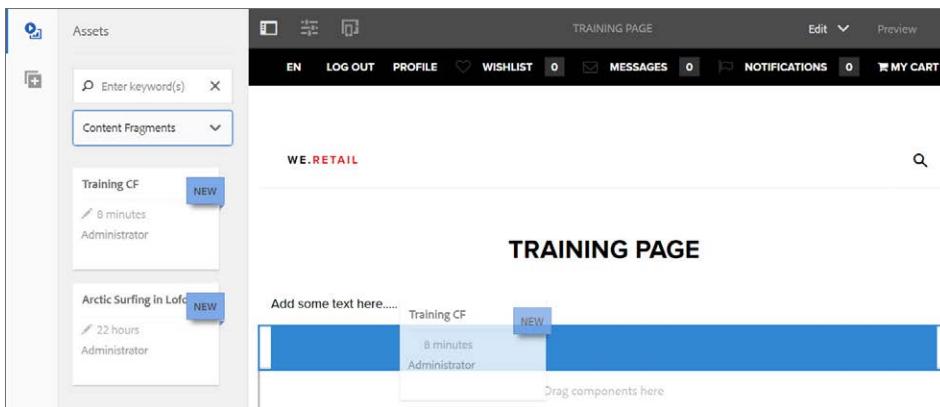
13. Drag and drop a **Content Fragment** component onto the page at the desired location.



14. Choose **Content Fragments** from Images drop-down, to view all the available content fragments.



15. Drag and drop **Training CF\_<username>** onto the **Content Fragment** component on tha page.



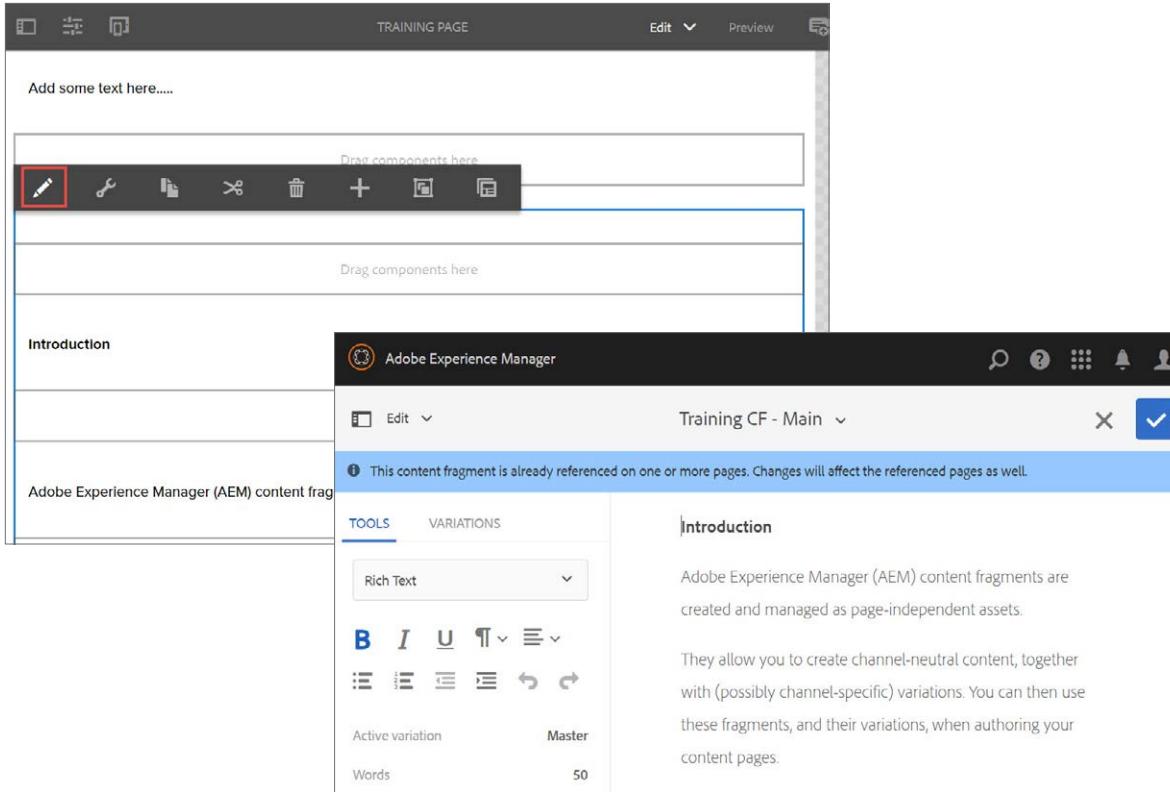
16. Open the page in **Preview** mode to view how the content fragments looks on the page.

The screenshot shows the AEM interface in Preview mode. The top navigation bar includes icons for user profile, search, and navigation, followed by the title "TRAINING PAGE". On the far right, there are "Edit" and "Preview" buttons, with "Preview" being highlighted and enclosed in a red box. The main content area contains two sections: "Introduction" and "Components of Content Fragments". The "Introduction" section contains the text: "Adobe Experience Manager (AEM) content fragments are created and managed as page-independent assets. They allow you to create channel neutral content, together with (possibly channel specific) variations. You can then use these fragments, and their variations, when authoring your content pages." The "Components of Content Fragments" section contains the text: "Content Fragments have:" followed by a bulleted list: • Fragments • Variations • Elements.

17. You add other components too within the content fragment.

The screenshot shows the AEM interface in Edit mode. The top navigation bar is identical to the previous screenshot. The main content area features a "Drag components here" placeholder box. Below it, the "Introduction" section is visible, also with a "Drag components here" placeholder box. This second placeholder box is highlighted with a blue border. The "Introduction" section contains the same text as in the previous screenshot. Below the "Introduction" section, another "Drag components here" placeholder box is present. The text "They allow you to create channel-neutral content, together with (possibly channel-specific) variations. You can then use these fragments, and their variations, when authoring your content pages." is visible at the bottom of the page.

18. To edit the content fragment, select the content fragment, and then click the **Edit** icon. The fragment editor opens in a new tab.

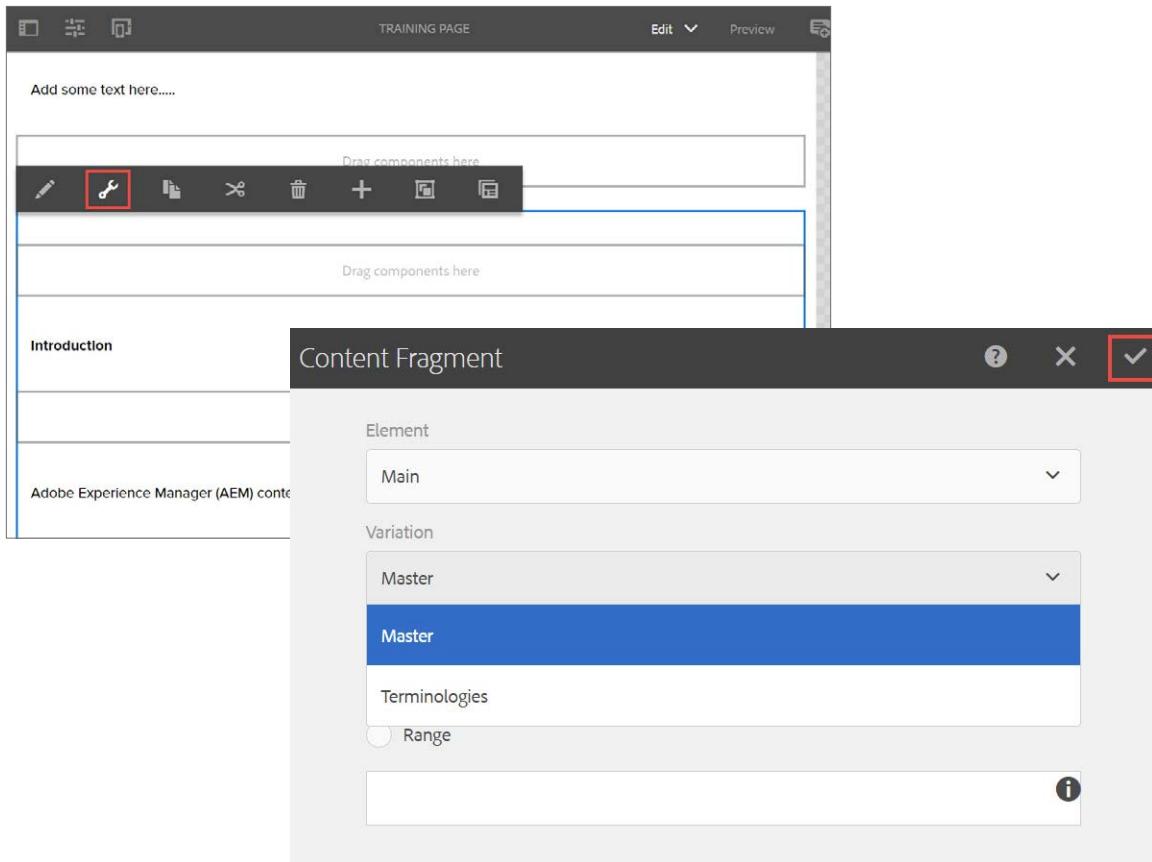


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**NOTE: The content fragment is already references on one or more pages. Changes will affect the referenced pages as well message appears**, while trying to edit a referenced content fragment.

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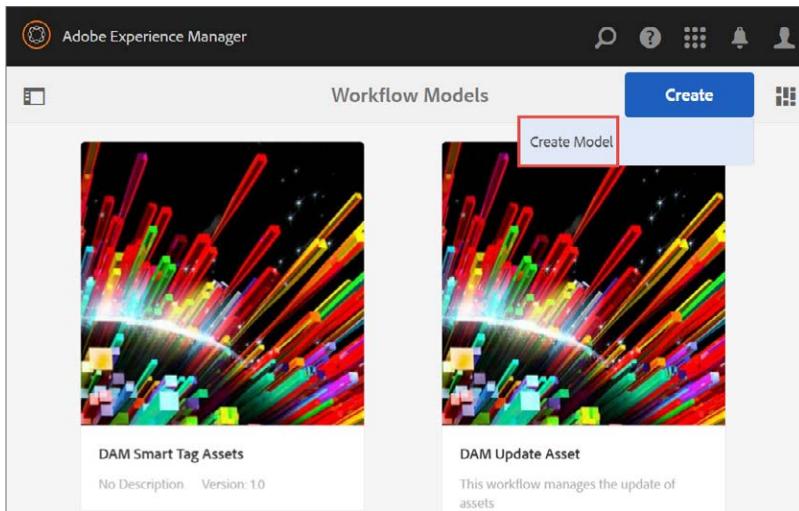
19. You can select the Variation of content fragment on your page, by clicking the **Configure** icon.



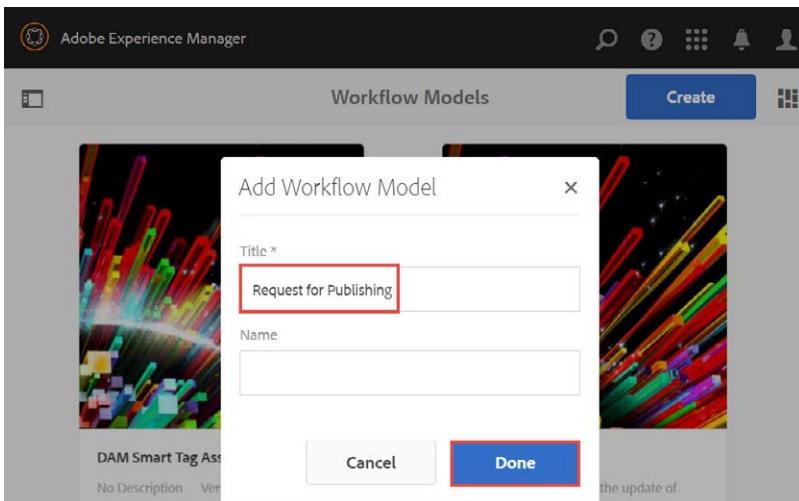
## Task 3: Create, edit, and use a workflow model to automate the page publishing process

To create a workflow model:

1. Navigate to **Tools > Workflow > Models**.
2. Click **Create > Create Model** from the toolbar. The **Add Workflow Model** dialog opens.



3. Specify the **Title** of your workflow (for example, **Request for Publishing\_<username>**).
4. Click **Done** to save and close the dialog. A new workflow is created in the **Models** tab. If you do not see your workflow right away, refresh your browser.



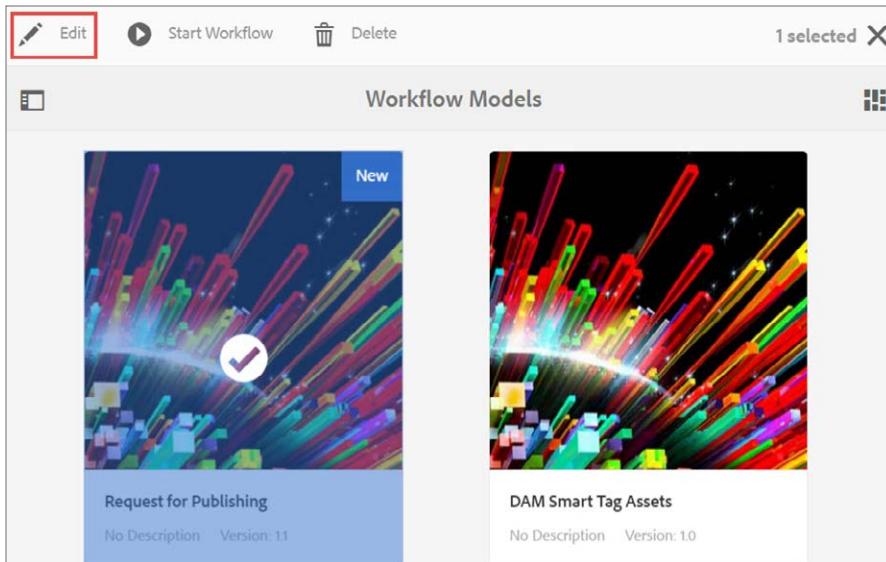
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 **NOTE:** It is important to create your model with a unique identifier so you can identify your model amongst those of your peers' models being created in the same environment.

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To edit the workflow model:

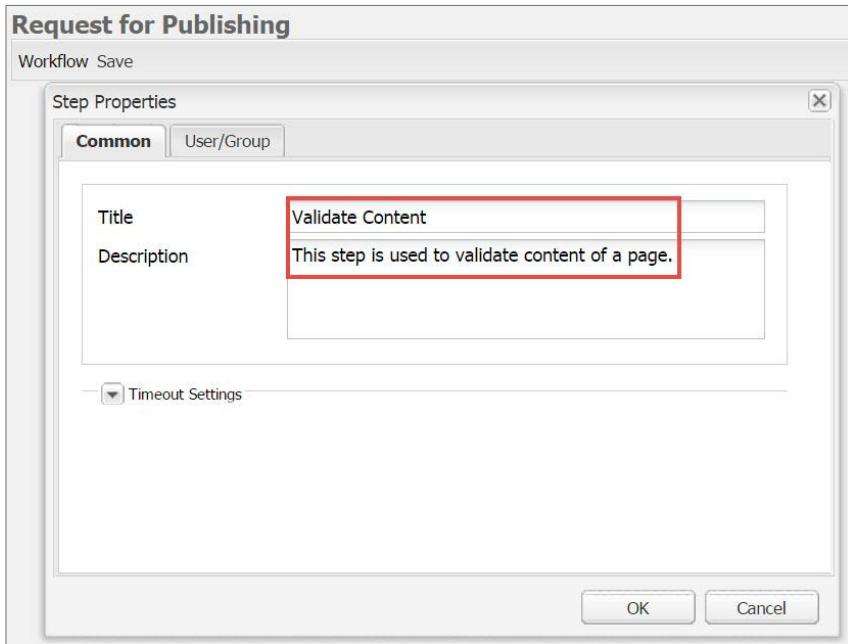
1. Select the **Request for Publishing\_<username>** model that you created earlier.
2. Click **Edit** from the toolbar. A new window (named after the workflow) opens for editing and configuring the workflow.



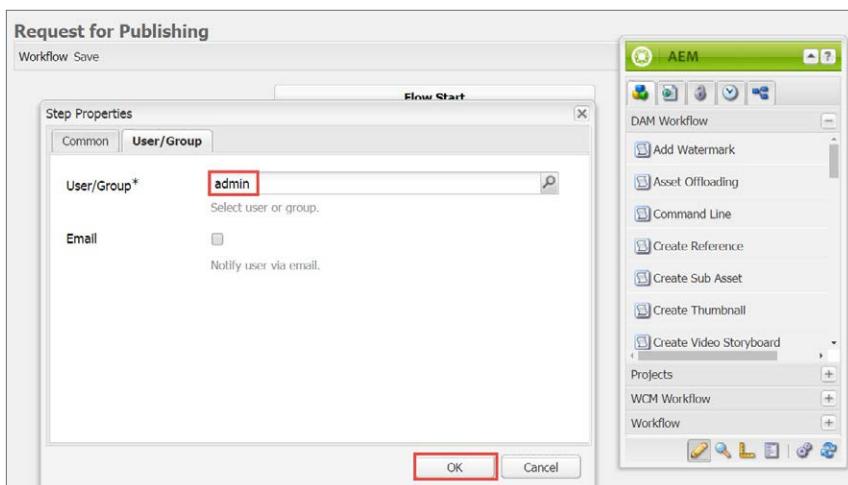
3. Three steps are created:
  - a. Flow Start
  - b. Step1
  - c. Flow End
4. Double-click **Step 1**. The **Step Properties** dialog opens.



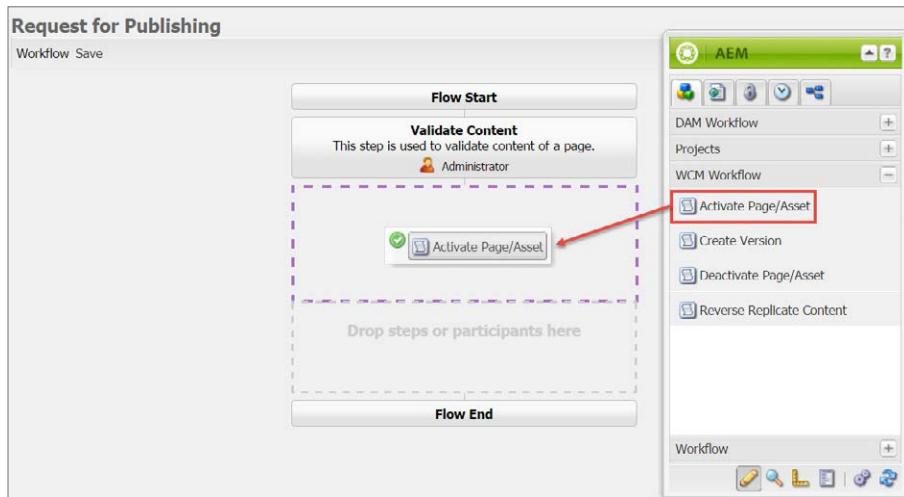
5. On the **Common** tab, add the following values:
- Title:** Validate Content
  - Description:** This step is used to validate content of a page.



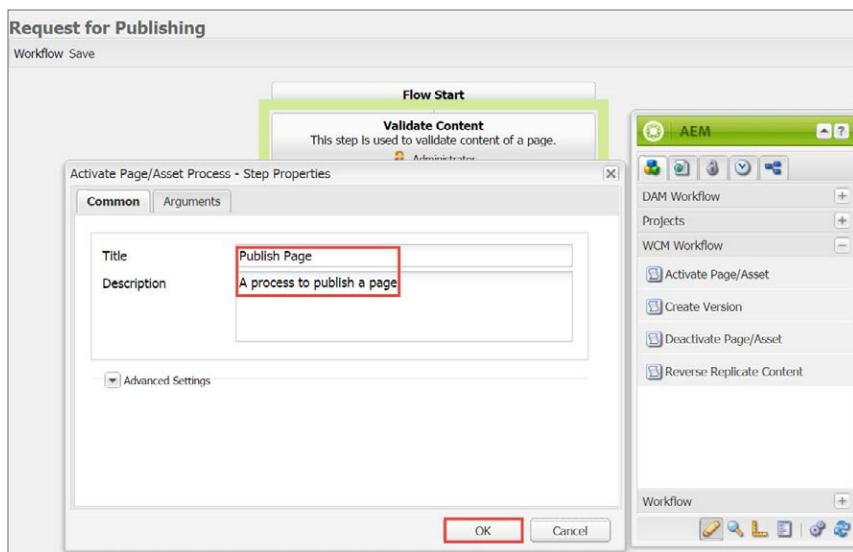
6. In **User/Group** tab, enter the following values:
- User/Group:** Choose the user you want to assign this step/task to.
    - Select any user from the drop-down to assign the task to that user, or assign the task by entering the user name in the field. For this task, assign it to yourself.
7. Click **OK** to save and close the dialog box.



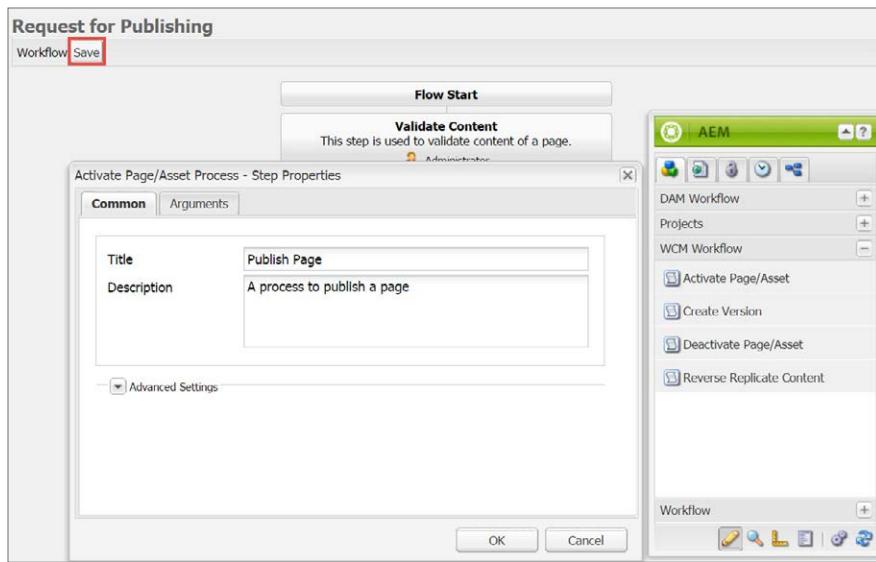
8. Drag and drop the **Activate Page/Asset** process step from the **WCM Workflow** onto the workflow.



9. Double-click the **Activate Page/Asset** process step. The **Step Properties** dialog opens.  
 10. On the **Common** tab, enter the following values:  
   a. Title: **Publish Page**  
   b. Description: **A process to publish a page**  
 11. Do not make any changes in the **Arguments** tab.  
 12. Click **OK** to save and close the dialog box.



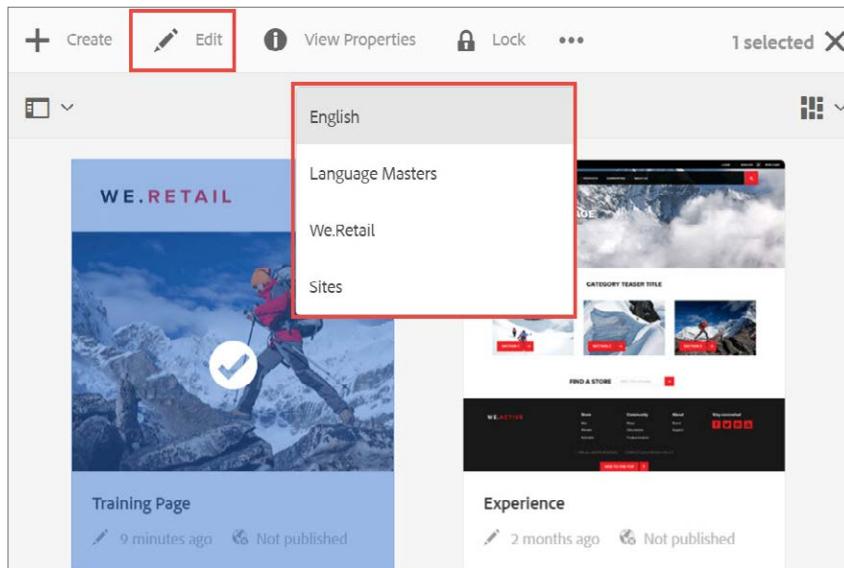
13. Click **Save** to save the changes made to the workflow.



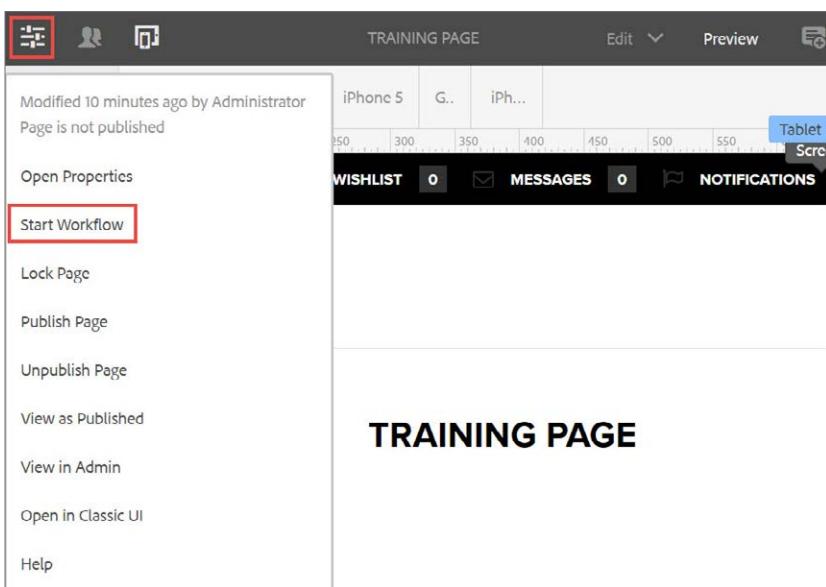
You have a workflow model with steps; let's start the workflow from a page that needs to be published.

To start the workflow from a page:

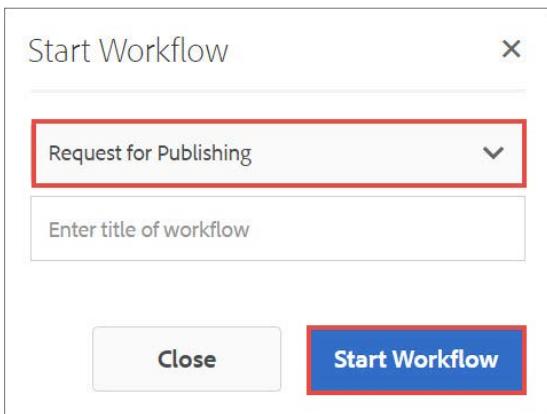
14. Open the **Training Page\_<username>** in **Edit** mode.



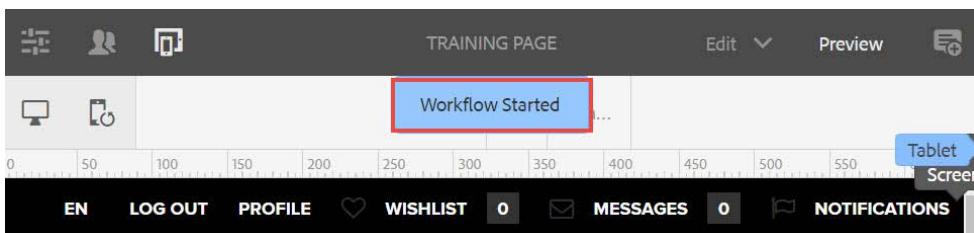
15. Select **Start Workflow** using the **Page Information** icon.



16. Select the **Request for Publishing\_<username>** model from the drop-down, and then click **Start Workflow**.

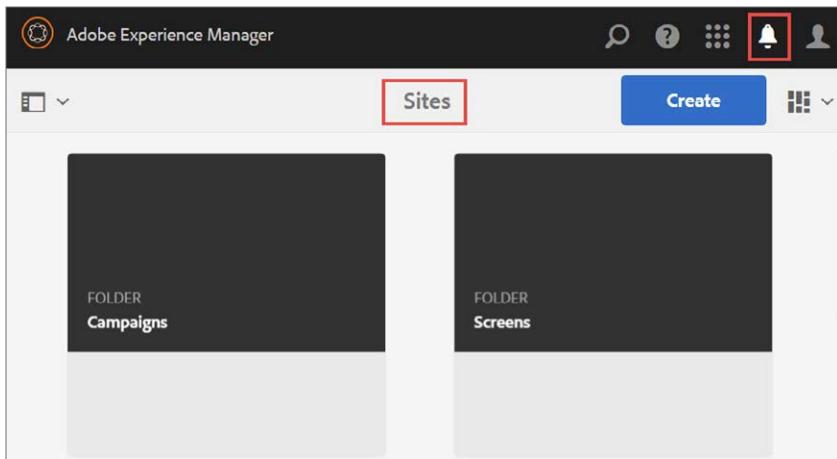


**Workflow Started** message appears on the page.

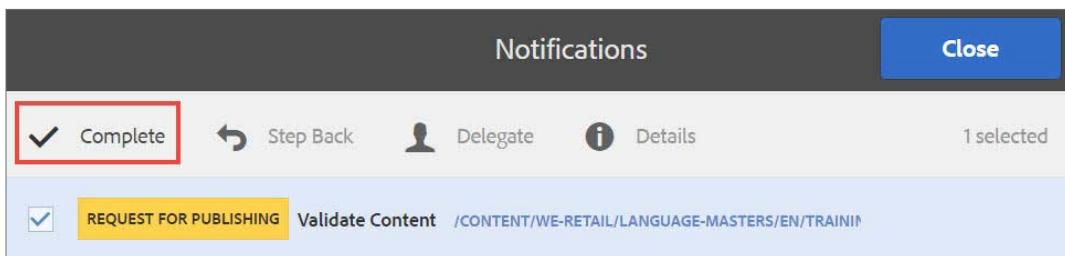


To complete the workflow:

17. Navigate to the **Sites** console and click **Notifications** to see the actions assigned to you.

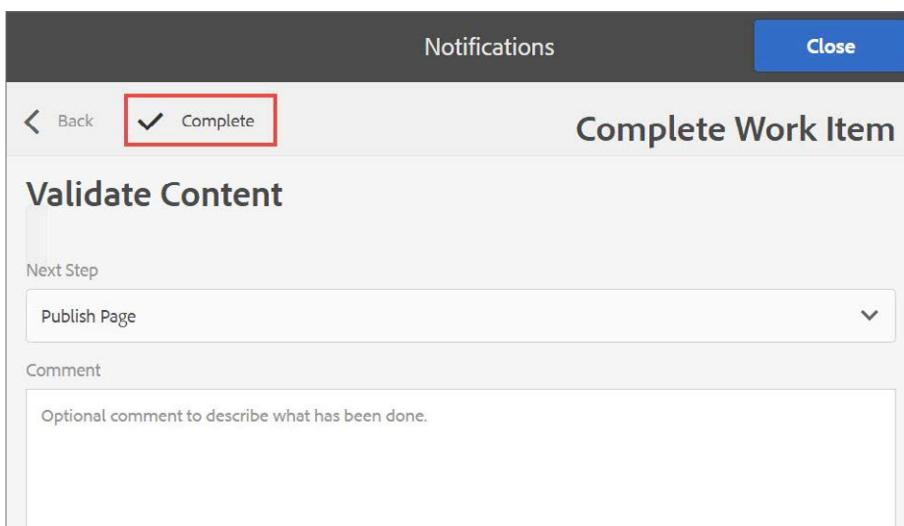


18. Select **VALIDATE CONTENT** and click **Complete**. The **Complete Work Item** screen opens.



19. Click **Complete** to complete **VALIDATE CONTENT** step of the workflow.

20. Optionally, you can add comments to describe the action taken to complete this step.



21. Click **Close** as there are no workitems in the inbox. You will be taken to the **Sites** console.

The screenshot shows a dark-themed interface titled 'Notifications'. In the top right corner, there is a blue button labeled 'Close' with a red rectangular border around it. Below the button, there is a small icon of a funnel labeled 'Filter'. At the bottom of the screen, a message reads 'There are no inbox items to display.'

22. Open **Training Page\_<username>**.

23. Click **Page Information** icon from the page toolbar. You will see that the **Publish Page** process step of workflow has published the page automatically.

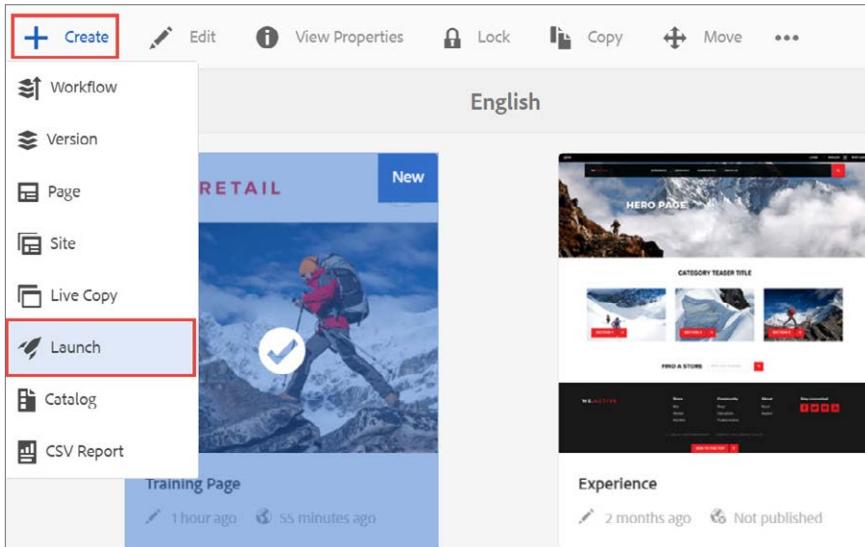
The screenshot shows a 'Page Information' dialog for a page titled 'TRAINING PAGE'. On the left, there is a sidebar with various options: 'Open Properties', 'Start Workflow', 'Lock Page', 'Publish Page', 'Unpublish Page', 'View as Published', 'View in Admin', 'Open in Classic UI', and 'Help'. A message box on the left side of the dialog contains the text: 'Modified 14 minutes ago by Administrator' and 'Page has been published 32 seconds ago by workflow-process-service'. The main content area on the right displays the heading 'TRAINING PAGE'.

**Try out yourself:** Access Training Page\_<username> in your Publish instance.

## Task 4: Create, edit, and promote a launch

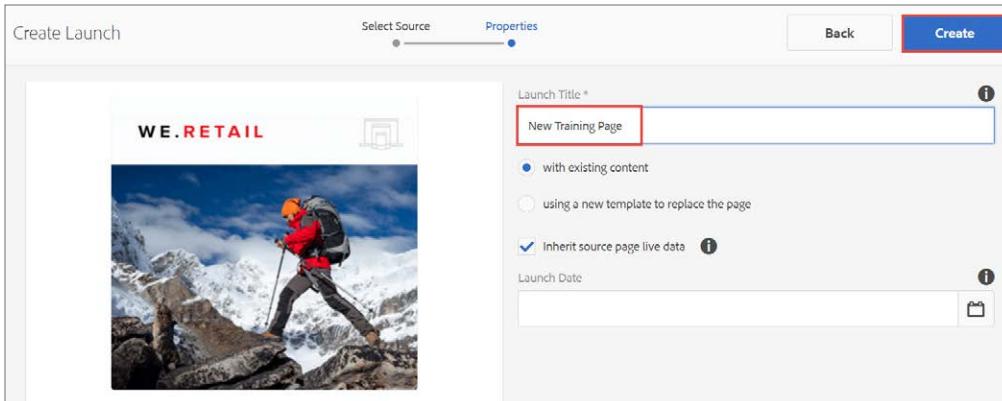
To create a launch:

1. Navigate to **Training Page\_<username>** from **Sites > We.Retail > Language Masters > English**, and click **Create > Launch**.



The screenshot shows the 'English' site structure in AEM. On the left, there's a sidebar with options like 'Workflow', 'Version', 'Page', 'Site', 'Live Copy', 'Launch' (which is highlighted with a red box), 'Catalog', and 'CSV Report'. Below the sidebar, there's a 'Training Page' item. The main area displays a preview of a website with a 'RETAIL' header, a 'HERO PAGE' section, and a 'FIND A STORE' footer. At the bottom, it says 'Experience' and shows '1 hour ago' and '55 minutes ago'.

2. In the **Create Launch** step of the wizard, specify:
  - a. **Launch Title:** New Training Page\_<username>
  - b. **with existing content**
  - c. Select **Inherit source page live data** option



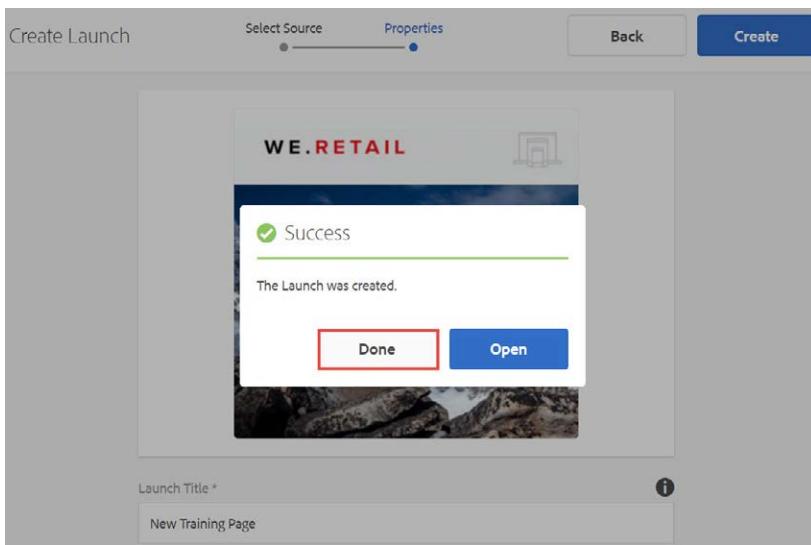
The screenshot shows the 'Create Launch' wizard. It has two tabs: 'Select Source' (selected) and 'Properties'. The 'Properties' tab is shown. On the left, there's a preview of a website with a 'WE.RETAIL' header and a person climbing a mountain. On the right, there are fields for 'Launch Title' (set to 'New Training Page'), 'Launch Date' (a date picker), and two radio buttons: 'with existing content' (selected) and 'using a new template to replace the page'. There's also a checked checkbox for 'Inherit source page live data'.

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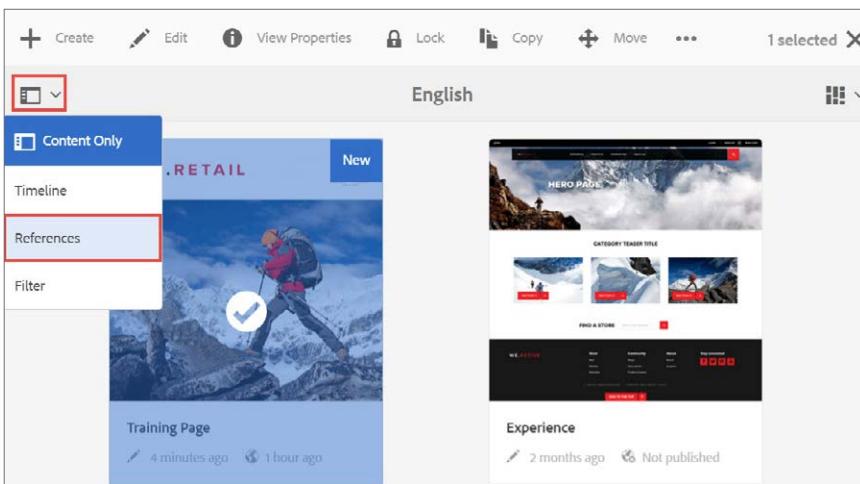
 **NOTE:** It is important to create your launch with a unique identifier so you can identify your launch amongst those of your peers' launches being created in the same environment.

---

3. Click **Create** to complete the process. The confirmation dialog will ask whether you want to open the launch immediately. Click **Done**.



4. Return to the **Sites** console to access the launch click **Training Page\_<username>**, and then click the left rail, and then select **References** from the drop-down.



5. Click **Launches (1)**, to view **New Training Page\_<username>**.

The screenshot shows the AEM interface with the 'References' panel open on the left. Under the 'LAUNCHES' section, 'Launches (1)' is selected and highlighted with a red box. On the right, a preview of a 'Training Page' is shown, featuring a person climbing a mountain. The page has a 'New' button in the top right corner.

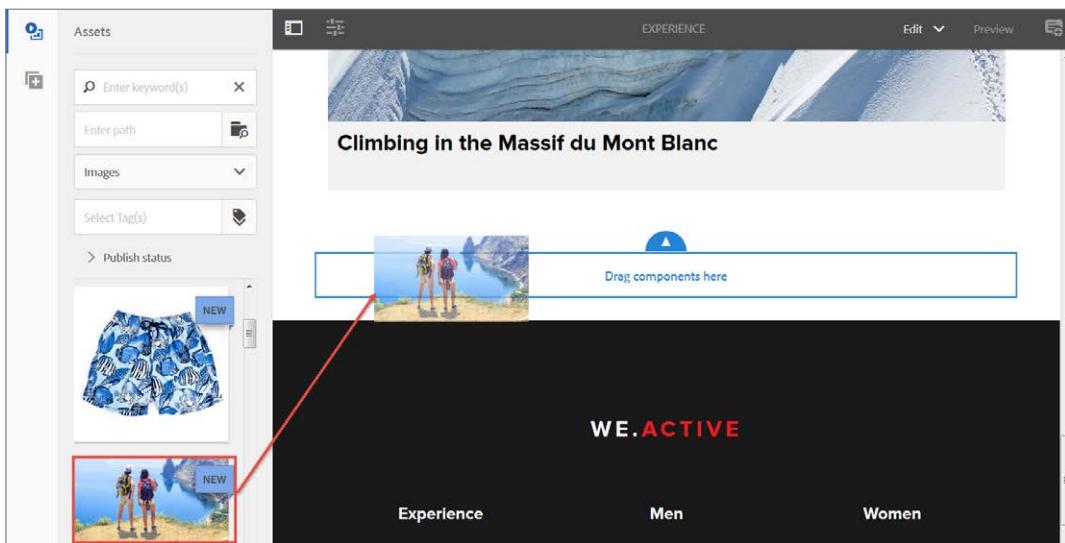
The screenshot shows the AEM interface with the 'References' panel open on the left. Under the 'LAUNCHES' section, 'New Training Page' is selected and highlighted with a red box. On the right, a preview of the same 'Training Page' is shown, with the 'New' button visible.

**To edit a launch:**

6. Click **Go to page** to edit and add new content to the launch. The launch page opens.

The screenshot shows the AEM interface with the 'References' panel open on the left. Under the 'LAUNCHES' section, 'New Training Page' is selected. The 'Go to the page' button in the list is highlighted with a red box. On the right, a preview of the 'Training Page' is shown, with the 'New' button visible.

## 7. Add a few components to the launch.

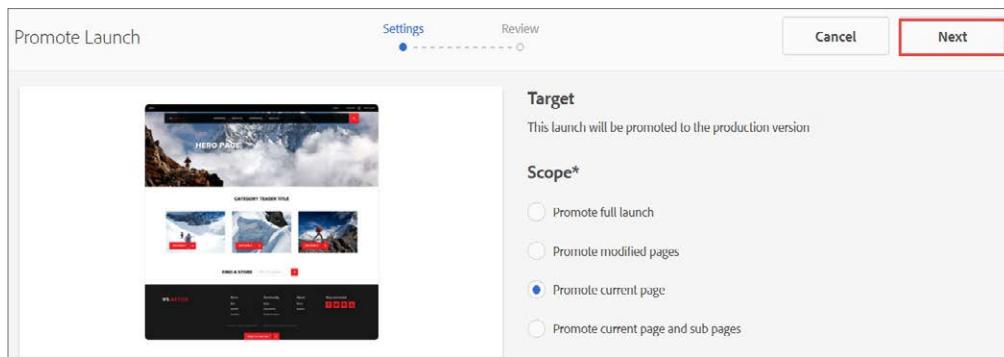


To promote a launch:

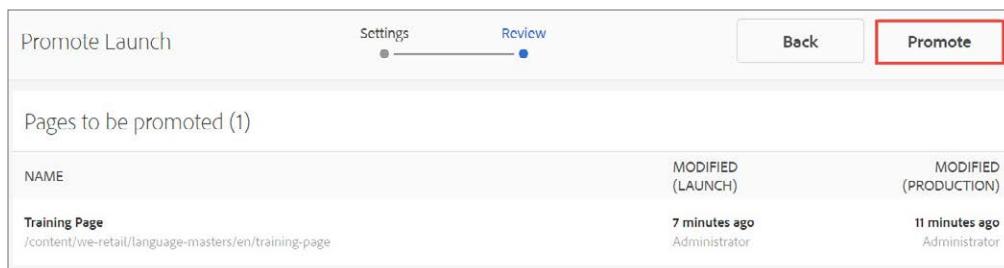
8. From the **Sites** console, navigate and select the **Training Page\_<username>** for which you created a launch earlier.
9. Select **References** from the left rail. All references are shown.

The screenshot shows the 'References' interface in AEM. At the top, there are buttons for 'Create', 'Edit', 'View Properties', and a selection counter '1 selected X'. Below this, a dropdown menu shows 'References' and 'English'. The main area displays a 'LAUNCHES' section with a card for 'New Training Page' (Updated 1 minute ago). The card includes a 'Go to the page' button and a 'Promote launch' button, which is highlighted with a red border. To the right of the card is a preview of the 'WE.RETAIL' training page, showing a climber on a mountain peak. At the bottom of the card, it says 'Training Page' and shows timestamps '4 minutes ago' and '1 hour ago'.

10. Click **Launches** to see a list of the specific launches.
11. Select the specific launch **New Training Page\_<username>** and click **Promote Launch** to open the wizard.



12. In the first step, specify the Scope of launch, select **Promote current page**, to only promote page changes for the current page,



13. Click **Next**.
14. In the second step, review the pages to be promoted.
15. Click **Promote**. The page is promoted to production.  
If you open the **Training Page\_<username>**, you will see the content of the launch page (overrides the existing content).





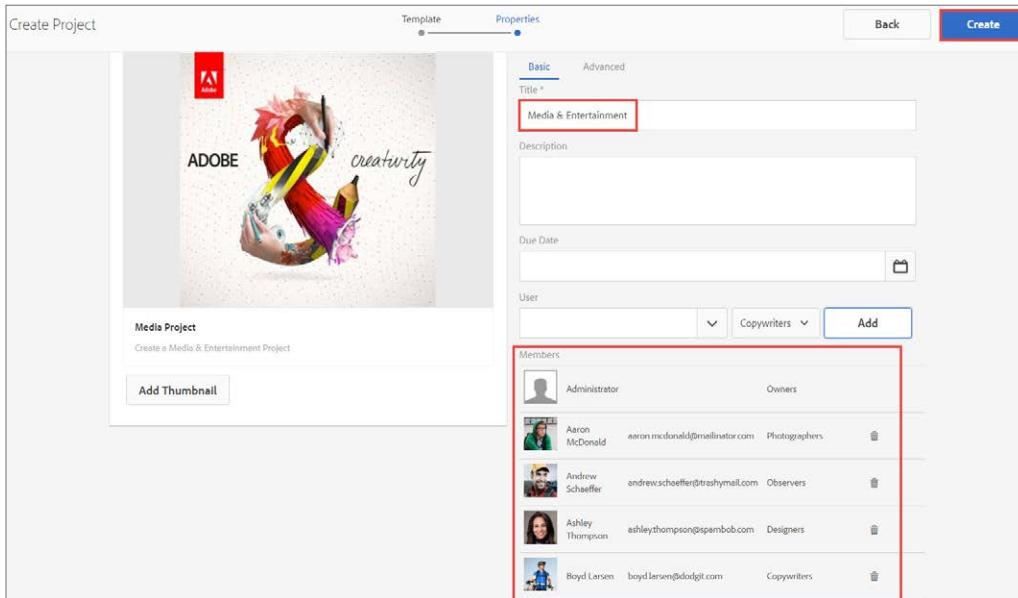
## Task 5: Create a project, add members, assign a workflow, and perform the tasks

To create a project:

1. From the **Projects** console, click **Create > Create Project**. The **Create Project** wizard launches.

2. Select the **Media Project** template from the screen, and click **Next**.

3. Enter the project **Title** as **Media & Entertainment\_<username>**.
4. In the **User** drop-down list, select **users**, choose their **role**, and then click **Add**.
5. Click **Create**.

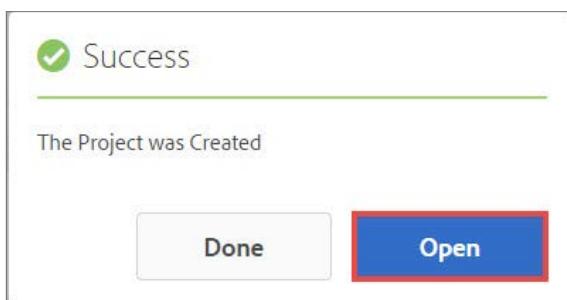


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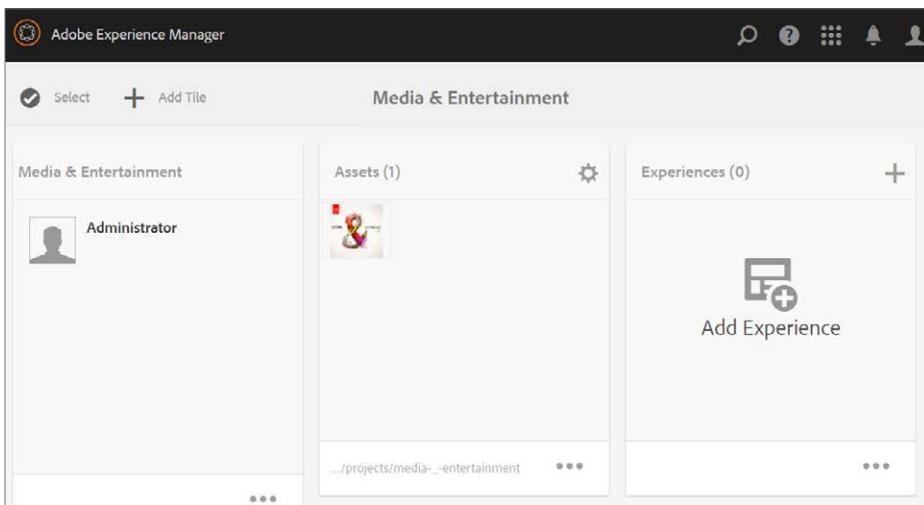
 **NOTE:** It is important to create your project with a unique identifier so you can identify your project amongst those of your peers' projects being created in the same environment.

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6. Click **Open** from the **Success** dialog box.



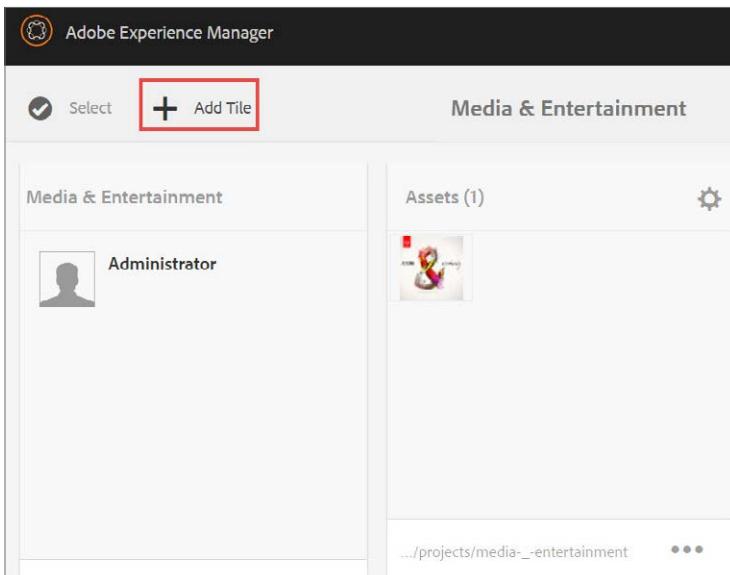
7. The **Media & Entertainment\_<username>** project opens and you can view all the tiles associated with the project.



The screenshot shows the Adobe Experience Manager interface with the title "Media & Entertainment". The top navigation bar includes a search icon, a question mark icon, a grid icon, a bell icon, and a user profile icon. Below the title, there are two main sections: "Assets (1)" and "Experiences (0)". The "Assets" section contains one item, represented by a small thumbnail image. The "Experiences" section has a large "Add Experience" button with a plus sign icon. On the left side, there is a sidebar with the title "Media & Entertainment" and a user profile for "Administrator". At the bottom of the screen, there is a URL ".../projects/media-entertainment" and three vertical dots indicating more options.

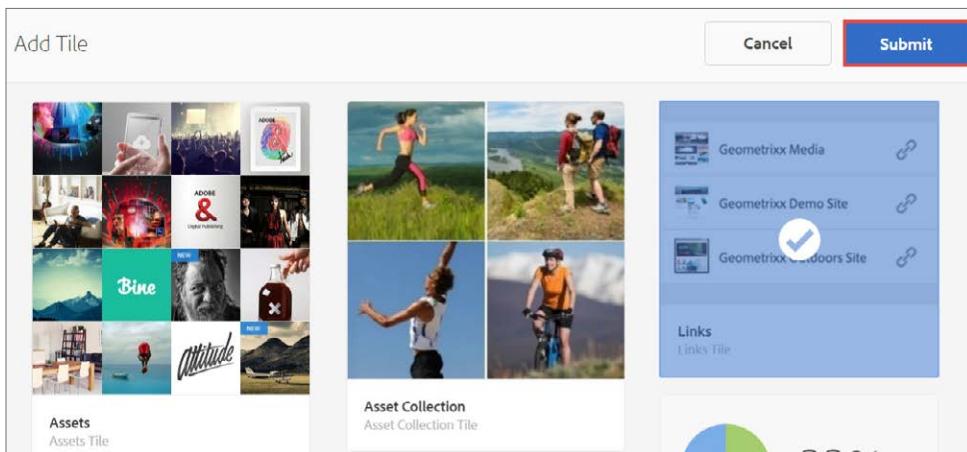
To add tiles to the project:

8. Make sure the **Media & Entertainment\_<username>** project is open, and then click **Add Tile** from the actions bar.



This screenshot is identical to the previous one, showing the "Media & Entertainment" project in Adobe Experience Manager. However, the "Add Tile" button in the top-left corner of the actions bar is now highlighted with a red box, indicating it is the target for the next step in the process.

9. Click the **Links** tile, and then click **Submit**.



The Links tile is added to your project.

To edit tiles of the project:

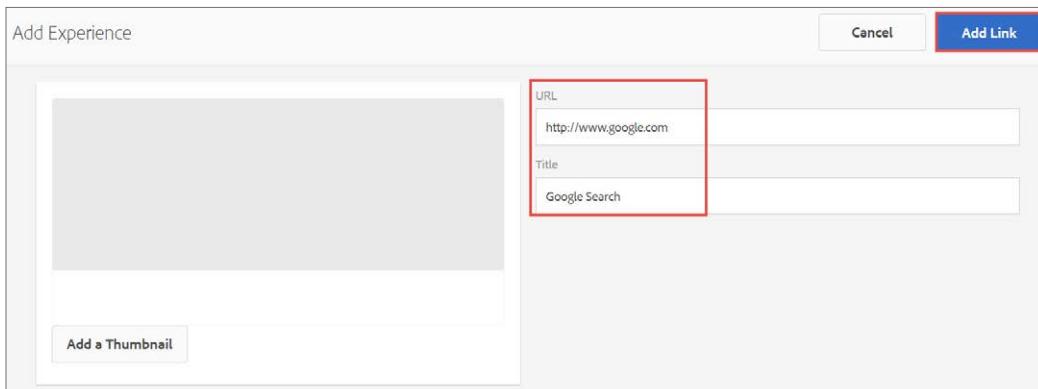
10. To add an external URL for the project, click the + icon from the **Links** tile.



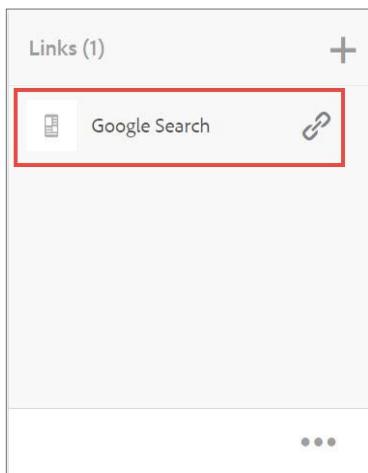
11. In the wizard, enter the following:

- a. **URL:** <http://www.google.com>
- b. **Title:** Google Search

12. Click **Add Link** to complete the process.

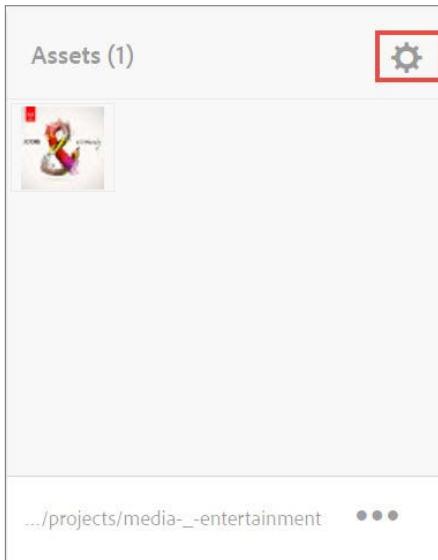


The new link is added and can be accessed by the members of the project from the Links tile.

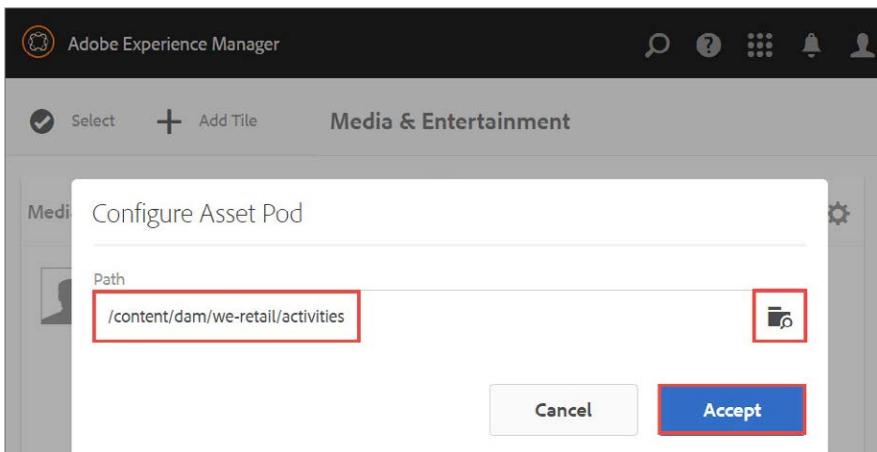


By default, you know the **Assets** tile points to the project's assets folder. Let's link the Assets tile to other asset folders of the Assets console.

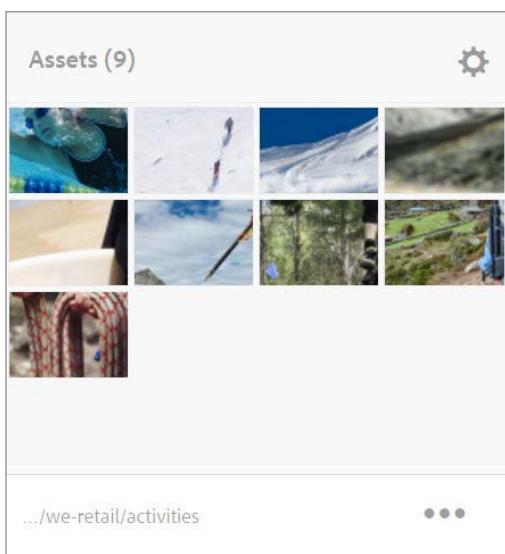
1. Click **Configure** (gear icon) in the **Assets** tile to link it to other folders. The **Configure Asset Pod** dialog box opens.



2. Click **Browse**. The **Select Path** dialog box appears.
3. Select **dam /we-retail / activities** path, and click **Accept**.

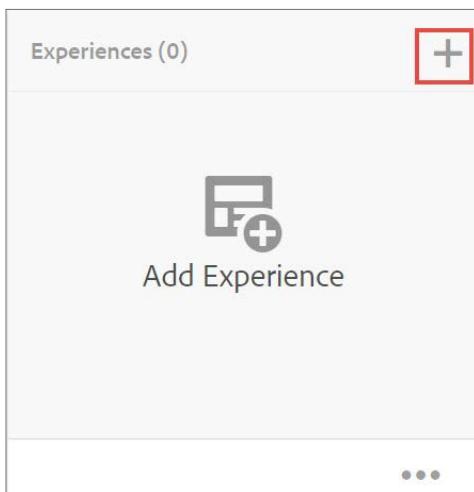


Now, the new Assets tile will have all the assets of **we.retail / activities**.

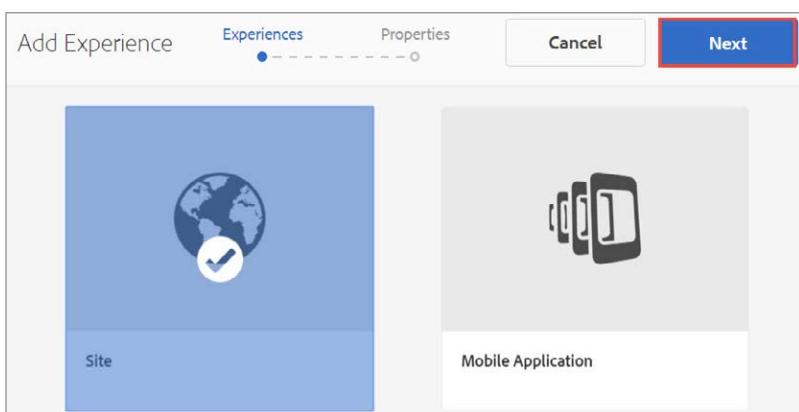


To add an experience to a project:

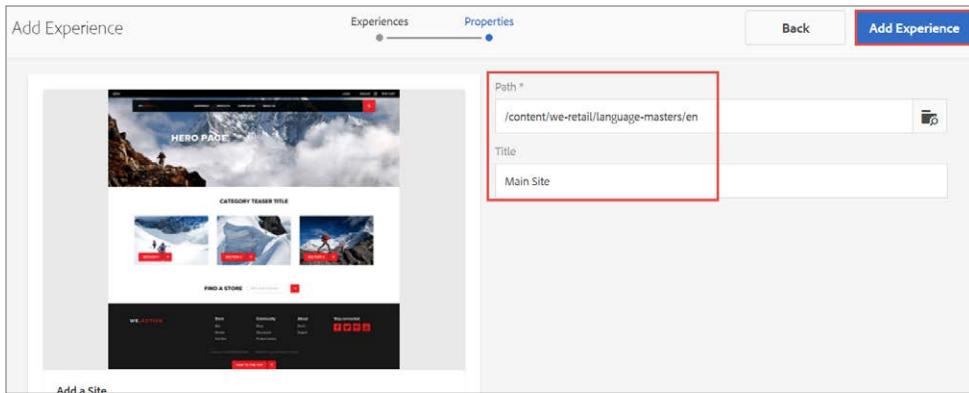
1. Click the + icon from the **Experiences** tile.



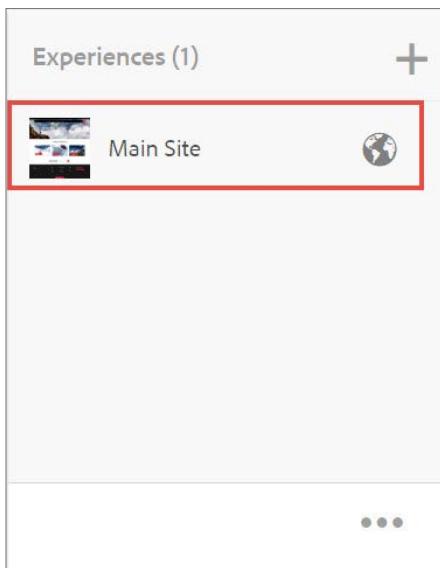
2. Select the type of experience you want to link (for example, **Site**), and click **Next**.



3. Enter the **Path** as **/content/we-retail/language-masters/en** to locate your website. Let the **Title** be **Main Site**.
4. Click **Create**. The site is now linked to your project and you will return to the **Experiences** tile.

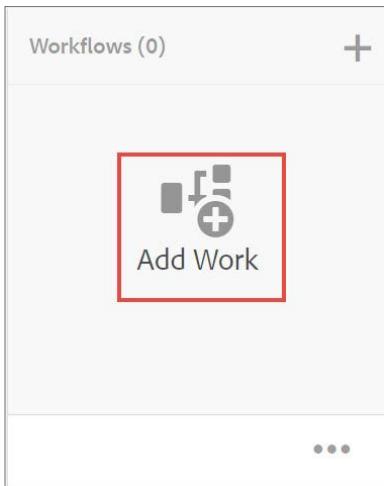


If you click **Site** from the Experiences tile, you will see the appropriate Adobe Experience Manager page linked with the site.

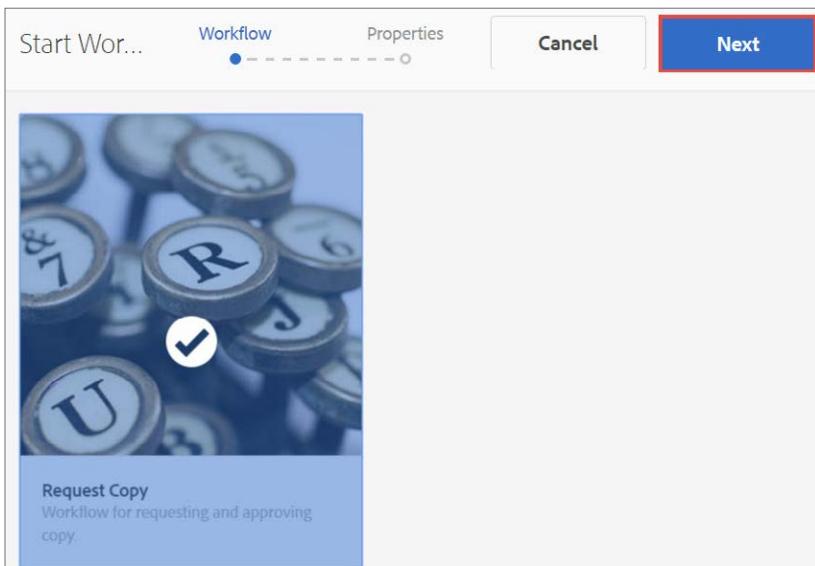


To initiate a workflow in a project:

5. Click **Add Work** icon (or + from the Workflows tile) to start a workflow.



6. Select **Request Copy**, and then click **Next**.



7. Enter the following values:

- Manuscript Title:** Ad Copy\_<username>
- Brief:** New ad copy for the site

8. Click **Submit**.

Start Workflow

Workflow Properties

Back Submit

Manuscript Title \*

Ad Copy

Brief \*

New ad copy for the site

Target Word Count

Task Priority

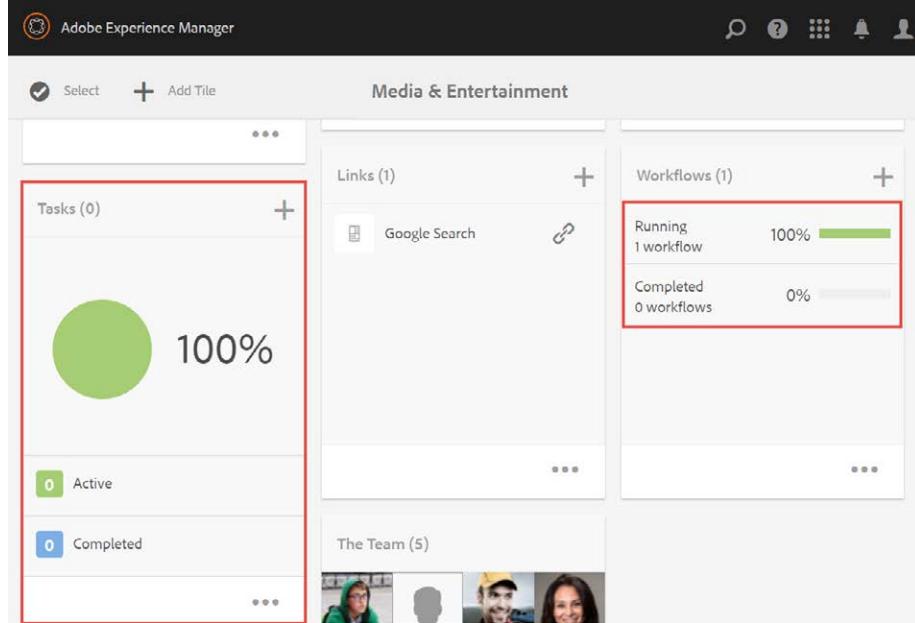
Medium

Request Copy

Workflow for requesting and approving copy

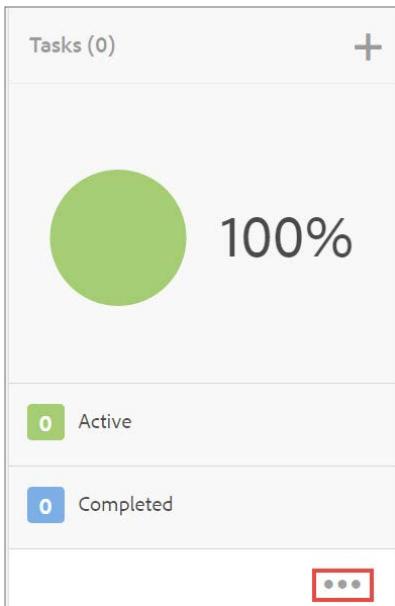
9. You will see the following changes in the project:

- The Workflows tile indicates that a workflow has started running.
- A new Tasks tile is added, which shows the status of tasks for this project.



To complete the tasks assigned to the project:

10. Click the ... icon in the **Tasks** tile to open the **Tasks** list screen. This screen displays all tasks related to the project.



Tasks associated with a workflow are grouped under the workflow entry. Notice that the **Generate Copy** task is nested in **Ad Copy** workflow.

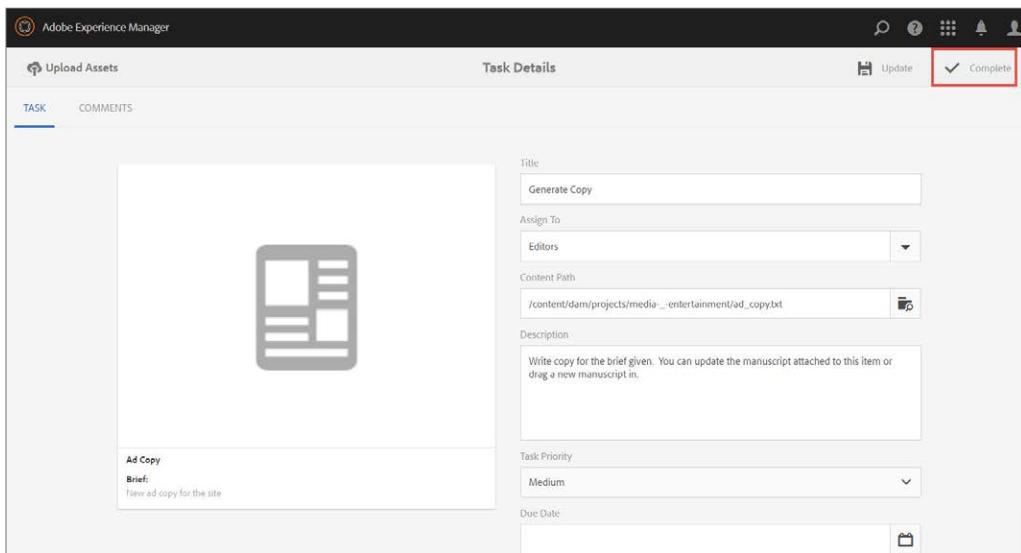
Tasks		
Title	Due Date	Assignee
Ad Copy Workflow for requesting and approving copy.		Administrator
Generate Copy Write copy for the brief given. You can update the...		Editors

11. Click **Generate Copy** task to open the **Tasks Details** screen.

The Task Details screen is where users enter information, comment, and work on a task. It has two tabs:

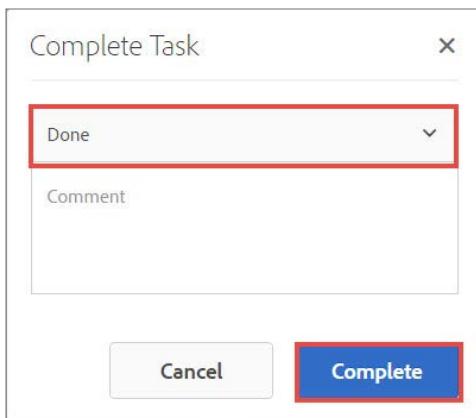
- a. Tasks—to edit the properties of a task
- b. Comments—to add quick task-related comment or question. Users can comment on a task even if they are not assigned a task.

12. Click **Complete** to save the changes.



The screenshot shows the 'Task Details' screen in Adobe Experience Manager. The task is titled 'Generate Copy' and is assigned to 'Editors'. The content path is '/content/dam/projects/media/\_entertainment/ad\_copy.txt'. The task priority is set to 'Medium'. A brief description is provided: 'Write copy for the brief given. You can update the manuscript attached to this item or drag a new manuscript in.' The 'Comments' tab is visible at the top, and the 'Complete' button is highlighted with a red box.

13. Select **Done** from the drop-down, and then click **Complete**. This returns you to the **Tasks** screen.

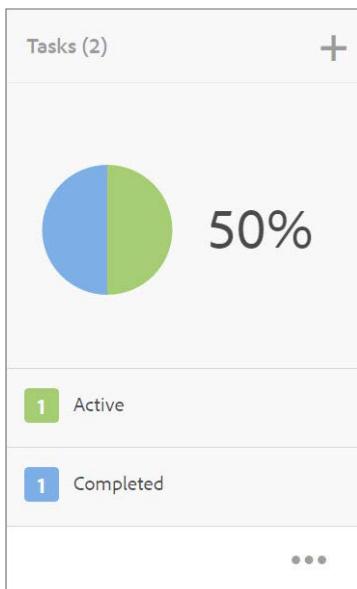


The screenshot shows the 'Complete Task' dialog box. The status is set to 'Done' in the dropdown menu, which is highlighted with a red box. There is a 'Comment' text area and two buttons: 'Cancel' and 'Complete', with 'Complete' highlighted with a red box.

14. Notice that the task is completed, but a new one is also created. This is because the workflow moves to the next step in the procedure.

Tasks			
Title	Due Date	Assignee	Priority
Ad Copy Workflow for requesting and approving copy.		Administrator	
Copy Approval Please approve or reject this copy.		Observers	Medium
Generate Copy Write copy for the brief given. You can update the in...		Editors	Medium

15. Navigate to the **Projects** console, open the **Media & Entertainment** project, and take a look at the progression of the workflow in **Tasks** tile of the project. You will notice the percentage and number of tasks Active and Completed.

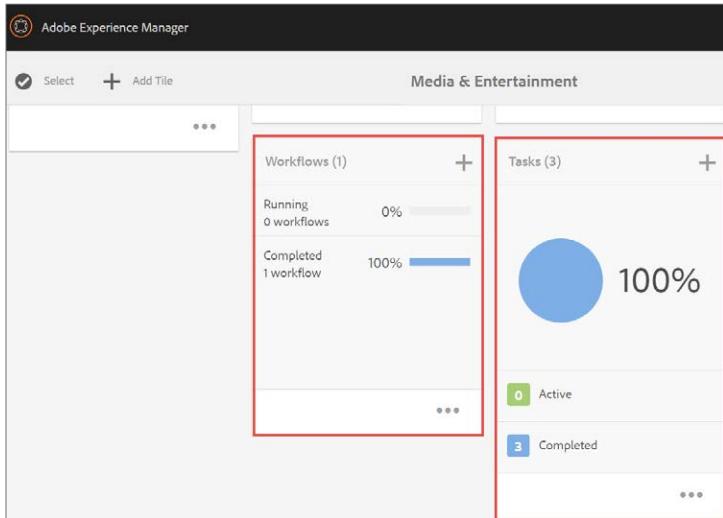


Follow the steps above and complete all the tasks of the workflow.

Tasks			
Title	Due Date	Assignee	Priority
Ad Copy Workflow for requesting and approving copy.		Administrator	
Copy Complete and Approved The copy request has been completed. Please see p...		Administrator	Medium
Copy Approval Please approve or reject this copy.		Observers	Medium
Generate Copy Write copy for the brief given. You can update the in...		Editors	Medium

16. Once you complete all the tasks, navigate to **Media & Entertainment\_<username>** project and observe **Tasks** and **Workflows** tiles.

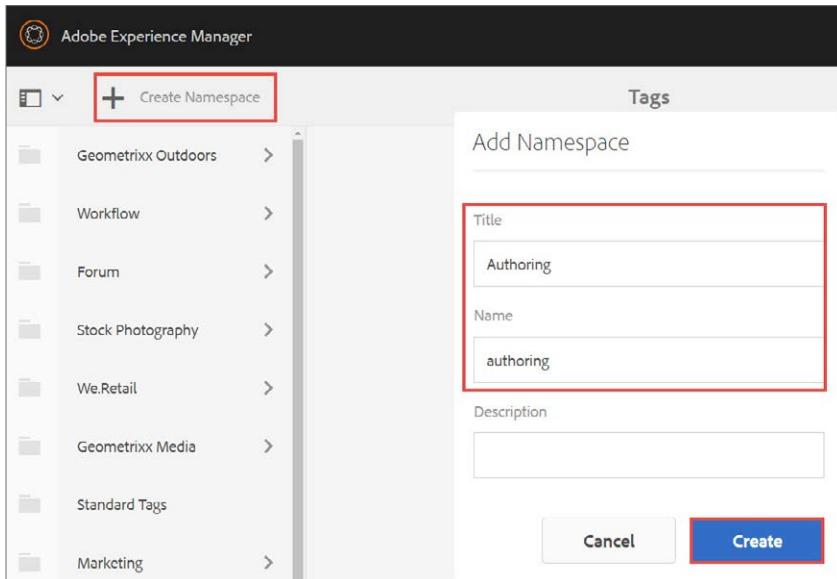
You will notice that the status of Workflows tile has changed to Completed 1 workflow - 100% and the Tasks tile now indicates that three (3) tasks are Completed. This means that all the tasks of the workflow completed successfully.



## Task 6: Create a namespace, add tags, and apply tags to pages

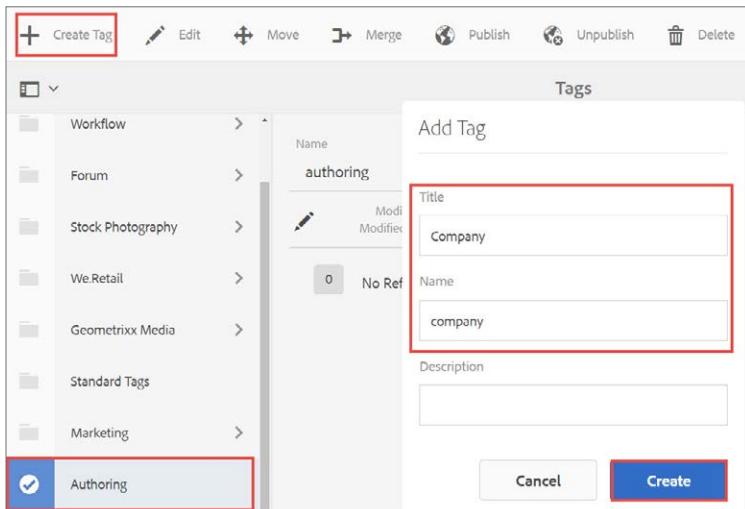
To create a namespace:

1. Navigate to **Tagging** console from **Tools > General** section
2. Click **Create Namespace** from the actions bar. The **Add Namespace** dialog box opens.
3. Provide a **Title** (for example, **Authoring\_<username>**), the **Name** gets auto-generated, and then click **Create**. The new namespace is added to the Tagging console.



To add tags to the namespace:

4. Select the **Authoring\_<username>** namespace.
5. Click **Create Tag**. The **Add Tag** dialog box opens.
6. Provide a **Title** (for example, **Company\_<username>**), the **Name** gets auto-generated, and then click **Create**.



7. To add more tags to **Authoring\_<username>** namespace, repeat steps 4 through 6.

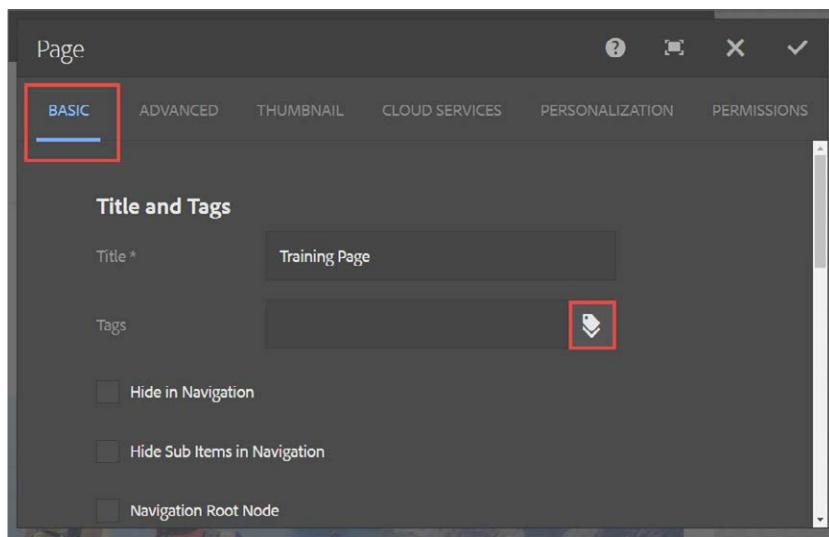
The screenshot shows the 'Tags' section in the 'Authoring' interface. On the left, there's a sidebar with various categories like 'Geometrixx Outdoors', 'Workflow', 'Forum', etc. The 'Standard Tags' category is expanded, showing three specific tags: 'Company', 'Student', and 'Author'. These three tags are highlighted with a red box.

To add tags to a page:

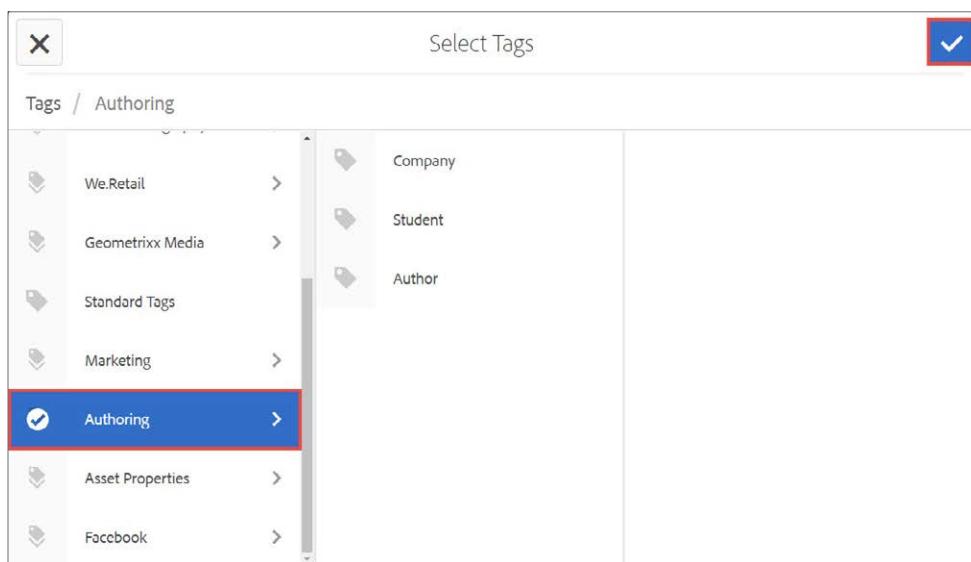
8. Open the **Training Page\_<username>**.
9. Click the **Page Information** icon from the toolbar, and select **Open Properties** from the drop-down. The **Page** dialog box opens.

The screenshot shows the 'Training Page' interface. At the top, there's a toolbar with icons. Below it, a context menu is open, listing options like 'Open Properties' (which is highlighted with a red box), 'Start Workflow', 'Lock Page', etc. The main content area shows a page titled 'RAINING PAGE' with a scenic image of a coastline.

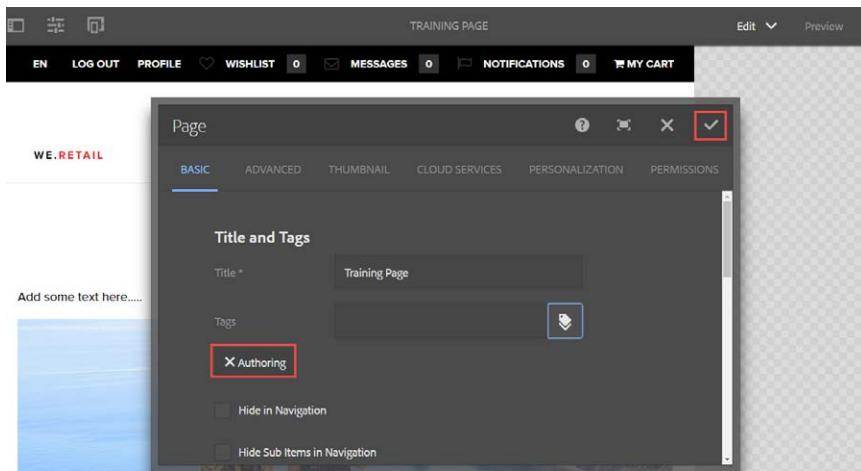
10. On the **BASIC** tab, click **Browse** from the **Tags** field to add some tags to the page. The **Select Tags** dialog box opens.



11. Select all the tags from the **Authoring\_<username>** namespace that you created earlier, and then click **Confirm**. You can select multiple tags using Ctrl+left click on the tags you want to add.



12. Click **Done** in the **Page** dialog box. All the tags of **Authoring\_<username>** namespace are added to the page.



13. Go back to the **Sites** console, and search for tags (for example, **Authoring\_<username>**). You will notice the **Training Page\_<username>** appears as a search result since it has all the tags of **Authoring\_<username>** namespace.

## Scenario Conclusion

By performing these tasks, you:

- Created an editable template to have intuitive and flexible page structure
- Created and used content fragments to optimize your content according to the specific channel.
- Created an efficient workflow model reflecting the business processes.
- Developed content for future releases.
- Created and managed projects in your WCM to ensure that the tasks in your project life cycle are completed as expected.
- Created and managed tags to provide seamless search functionality embedded in the website.

## Summary

You should now be able to:

- Define Template Editor
- Create and use editable templates in pages
- Explore Design mode of pages
- Create and use Content Fragments in pages
- Define workflows
- List the interface elements of Workflow console
- Create and use a workflow to automate business processes
- Define launches
- Create and promote launches
- Create and promote nested launches
- List the interface elements of Projects console
- Create and manage projects
- List the interface elements of Tagging console
- Create and add tags to a namespace
- List the reasons to use tags in pages

# Personalization and Content Targeting

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## Overview

This module shows you how to use the framework of tools for authoring targeted content and presenting personalized experiences in Adobe Experience Manager

## Objectives

By the end of this chapter, you will:

- Define personalization and its use in today's world
- Define the tools used for personalization and content targeting
- Explore Personalization console
- Define ContextHub
- Explore user profiles in ContextHub
- Explain the process to create activities
- Map audiences with experiences
- Simulate an experience using ContextHub
- Define landing pages
- Create and import landing pages
- Perform various actions of landing pages

# Introduction to Personalization

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There is an ever-increasing volume of content available today, be it on Internet, Extranet, or Intranet websites.

Personalization centers on providing the user with a tailor-made environment displaying dynamic content that is selected according to their specific needs - whether it's based on predefined profiles, user selection, or interactive user behavior.

Personalization involves three main elements:

1. Users:

- › Have profiles, both individual and group. These profiles contain characteristics (such as job description, location, and interests) that can be used to personalize the content they can see and take actions. These can then be analyzed and matched against behavior rules to tailor the content they see.

2. Content:

- › Is what the user wants to see. Preferably content of interest and use to them for fulfilling their tasks.
- › Can be categorized, and therefore made available to users according to predefined rules. The content must be dynamic; in other words, the content must, in some way, be dependent upon the user – if every user sees the same content, then personalization would be redundant.

3. Rules:

- › Define how personalization actually happens – which content the user can see, and when.

Personalization can be used in many cases, for example:

- Intranet pages:

- › Content can be proffered based on the location, department, and/or role of a user – already defined within an internal network.
- › Dependent on the choice available, the user can make further selections.

- Specific, limited, target user groups (extranets):

- › Users require a login for authorization; this is linked to a profile providing information required for personalization; possibly details such as their location, relationship to the product, usage history, budgeting responsibilities, etc.

- › Such instances can range over sites such as:
  - » Companies that provide websites to a highly specialized section of their market (for example, a pharmaceutical company providing a specialized website for physicians).
  - » Companies that provide websites allowing their customer to view current account and billing information (for example, telephone providers).
- Sales and Distribution website:
  - › Sales and distribution websites, such as Amazon, can combine a user profile, the user's sales history, and their browsing history to make suggestions as to what might interest the user next.
- Search websites
  - › Many of the major search engine websites have very powerful analytical tools that record user behavior, the search terms they use, and the websites they actually visit. This is then used to customize the content provided – particularly with regard to displaying advertisements.

# Personalization and Content Targeting Tools

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Adobe Experience Manager provides a framework of tools out-of-the-box for authoring targeted content and presenting personalized experiences:

- **Brands**—are a collection of activities.
- **Activities**—define and organize your marketing efforts. It comprises the audiences that you are targeting, and the period of time when the targeting is applied.
- **Experiences**—for each activity, you define one or more experiences that identify the audiences that you are targeting.
- **Offers**—are the content that appears at a location on a page for an experience. Use different offers for different experiences to maximize the effectiveness of the content for your audiences.
- **Audiences**—are based on marketing segments created in either Adobe Experience Manager or Adobe Target.
- **Targeting Mode**—provides tools for creating content for the experiences of your marketing activities.
- **Targeting Engine**—is the mechanism that drives the logic for targeted content. Two targeting engines are available:
  - › Adobe Experience Manager—has a built-in targeting engine that processes page requests and determines the content to display.
    - » You can use the segments created in Adobe Experience Manager for defining the audiences of your experiences.
  - › Adobe Target—uses information gathered from page visits.
    - » You can use the segments that you import from Adobe Target to define the audiences for your experiences.
    - » Activities that use Adobe Target engine are synchronized to Target.

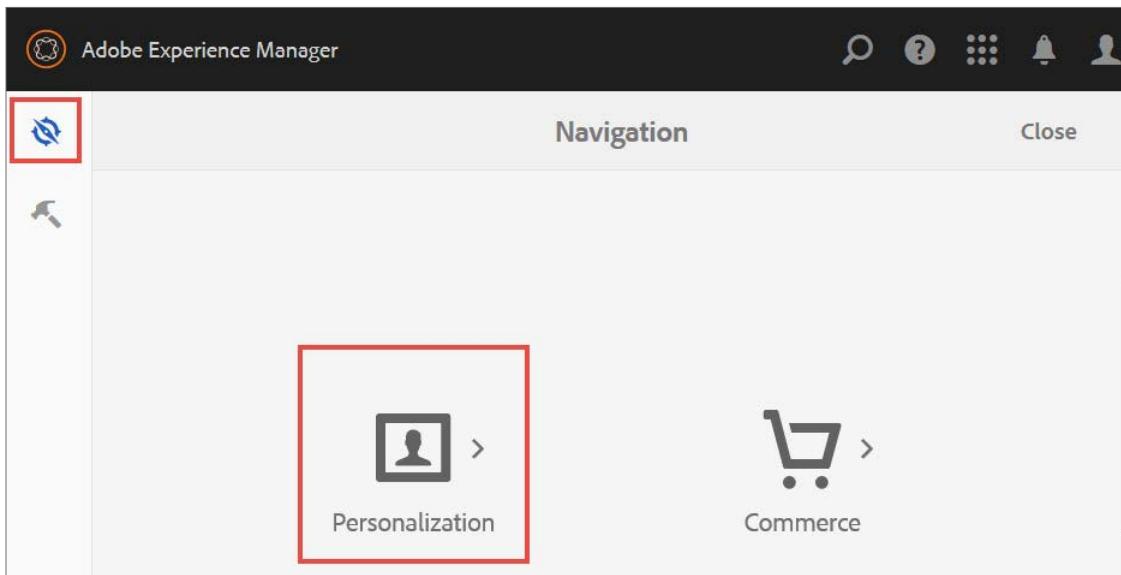


NOTE: You can use Target engine, only when you have integrated Adobe Experience Manager with Adobe Target.

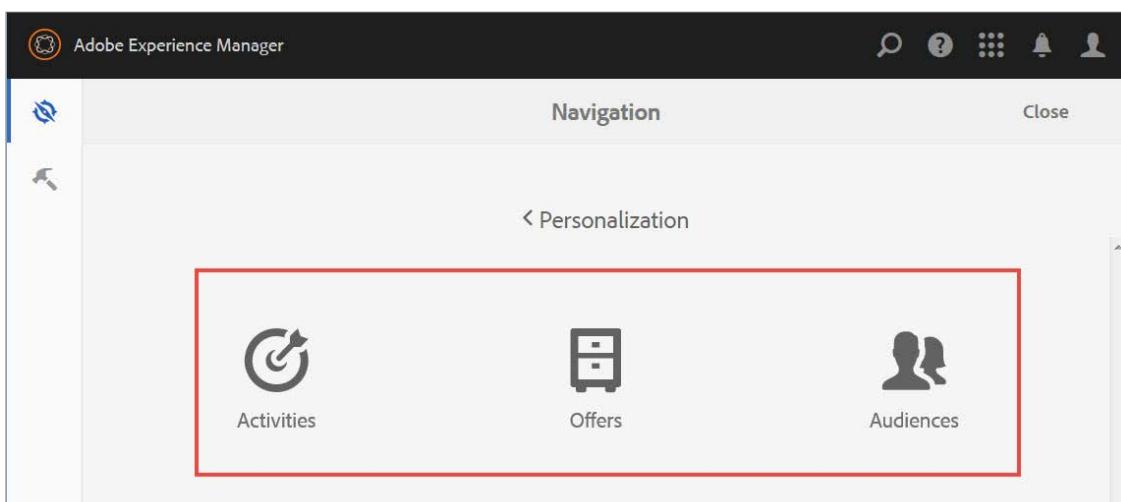
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## Personalization Console

On installing Adobe Experience Manager, you can see the **Personalization** console from the **Product Navigation**. You can use this console to author targeted content and present personalized experiences.



You can navigate within the **Personalization** console by using the arrowheads (>).



The Personalization console has the following consoles:

## Activities

Lets you create, organize, and manage the marketing activities of your brands. Using the Activities console, you can:

- Add brands

Title	Status	Modified	
Geometrixx Outdoors	4 years ago Administrator	Not published	<a href="#">Create Brand</a>
we.RETAIL	6 months ago Administrator	Not published	

- For each brand, you can add, edit, publish, unpublish, configure, and administer activities.

Title	Status	Modified	
Home Page Hero	Not synced	5 months ago Administrator	<a href="#">Create</a>

- Create Area and Create Area as Live Copy allows you to manage activities, experiences, and offers between the sites, you can take advantage of Adobe Experience Manager's built-in multisite support for targeted content.
- **Areas** separate targeted content (activities, experiences and offers) used in different sites and provide an Multi-Site Manager (MSM)-based mechanism to create and manage the inheritance of targeted content together with site inheritance.
  - This prevents your having to re-create targeted content in inherited sites as was required in Adobe Experience Manager prior to 6.2.
  - In an area, only activities linked to that area are pushed to live copies. By default, the Master Area is selected. After you create additional areas, you can link those to your sites or pages to indicate which targeted content is pushed.
- A site or **Live Copy** links to an area containing the activities that need to be available on that site or live copy. By default the site or live copy links to the master area, but you can link other areas besides the master area as well.

- Add one or more experiences to the activity.
  - › You can add experiences from ContextHub (AEM) and Adobe Target engines.
    - » Using ContextHub (AEM) engine: This lists all the existing segments and experiences available within Adobe Experience Manager.

The screenshot shows the 'Configure activity wizard' interface. The top navigation bar has tabs: 'Details' (selected), 'Target', and 'Goals & Settings'. Below the tabs, there are several input fields:
 

- Name \***: Training Activity
- Targeting engine**: ContextHub (AEM) (highlighted with a red box)
- Select a Target Configuration**: A dropdown menu
- Activity type**: A dropdown menu
- Objective**: A text area with placeholder text: "Enter an objective. This can be the goal and/or a description of the activity."

 At the bottom right are 'Cancel' and 'Next' buttons.

- » Using Adobe Target engine: You need to specify Target Configuration and you must have an Adobe Target account to access the segments).

The screenshot shows the 'Configure activity wizard' interface. The top navigation bar has tabs: 'Details' (selected), 'Target', and 'Goals & Settings'. Below the tabs, there are several input fields:
 

- Name \***: Training Activity
- Targeting engine**: Adobe Target (highlighted with a red box)
- Select a Target Configuration**: A dropdown menu
- Activity type**: A dropdown menu
- Objective**: A text area with placeholder text: "Enter an objective. This can be the goal and/or a description of the activity."

 At the bottom right are 'Cancel' and 'Next' buttons.

## Offers

Allows you to create offers that can be used in activity experiences. Using the Offers console, you can:

- Add brands
  - › When you create a brand using the Offers console, it also appears in the Activities console, where you can add and administer activities for the brand.
- Add a folder to an Offer Library—to organize and store offers. You can create a folder under

Title	Status	Modified
Geometrix Outdoors	Administrator	4 years ago
we.RETAIL	Administrator	6 months ago

Brand, or under any other folder.

- › Create an offer once in the library and use it in multiple experiences of your brand activities.
- › You can edit, search, and delete offers.
- › Similar to Activities, you can **Create Area** and **Live Copy** of offers that can be used across multiple sites.

Title	Status	Modified
Home Page Hero	Administrator	5 months ago

## Audiences

Enables you to create, organize, and manage audiences for your Adobe Target account or manage segments for ContextHub.

Audiences, called segment in ContextHub and ClientContext, is a class of visitors defined by specific criteria, which then determines who sees a targeted activity. When you target an activity, you can either select audiences directly in the Targeting process or create new ones in the Audiences console.

In the Audiences console, audiences are organized by brand. Audiences are available in Targeting mode for authoring targeted content, where you can also create audiences (but you need to create Adobe

Target audiences in the Audiences console). Audiences that you create in Targeting mode appear in the Audiences console.

Audiences are displayed with a label describing what kind of audience is defined:

- CH - ContextHub segment
- CC - Clientcontext segment
- AT - Adobe Target audience

Using Audiences console:

- Add Audiences - either Adobe Target audiences or ContextHub Segments.
- Manage audiences.

The screenshot shows the Adobe Experience Manager Audiences console. At the top, there is a navigation bar with icons for search, help, and user profile. Below the navigation bar, the title "Audiences" is centered above a table. The table has a header row with columns for "Name" and "Created". There are seven rows of data, each representing an audience: "Female" (CH), "Female Over 30" (CH), "Female Under 30" (CH), "Male" (CH), "Male Over 30" (CH), and "Male Under 30" (CH). All audiences were created "1 year ago". In the top right corner of the table area, there is a blue "Create" button. A red box highlights this button and the dropdown menu that appears when it is clicked. The dropdown menu contains two options: "Create Target Audience" and "Create ContextHub Segment".

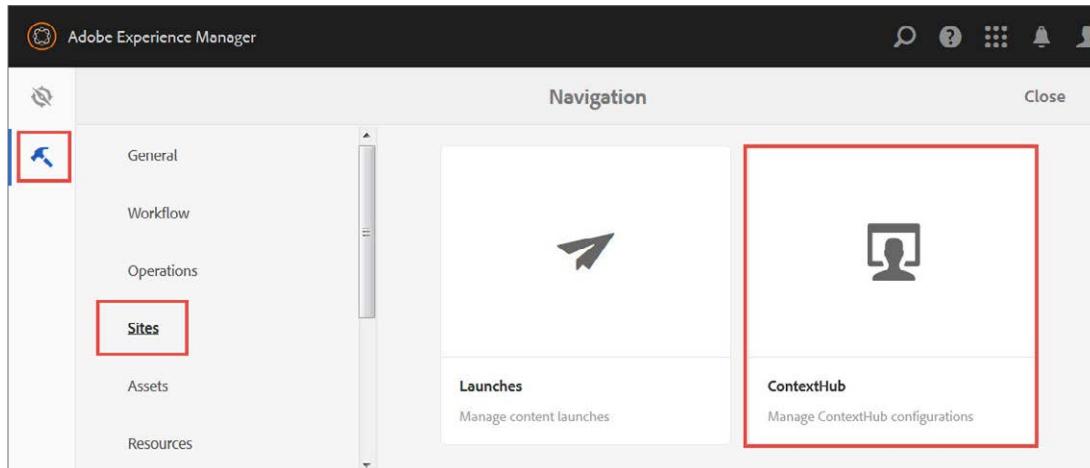
Name	Created
Female	1 year ago
Female Over 30	1 year ago
Female Under 30	1 year ago
Male	1 year ago
Male Over 30	1 year ago
Male Under 30	1 year ago

# ContextHub

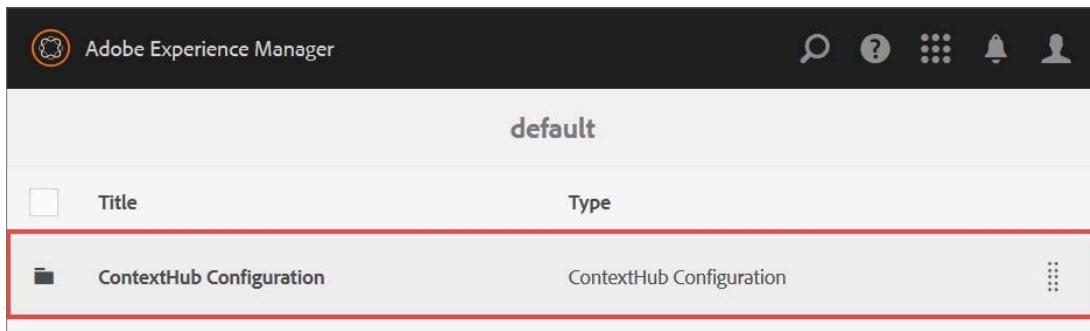
ContextHub is a framework that lets marketers access page and visitor information. It allows marketers to simulate visitor experience—what they want to see, and what they actually see on a page. You will use ContextHub to test the experiences based on visitor interactions.

## ContextHub Console

You can access and view **ContextHub** from the **Sites** section of **Tools** console.



ContextHub console allows you to manage various configurations from **Configuration Container**.



ContextHub consists of ContextHub stores to persist context data on the client and UI modes to access the store.

The screenshot shows the 'ContextHub Configuration' page in Adobe Experience Manager. At the top, there is a search bar, a help icon, a grid icon, a bell icon, and a user profile icon. A blue 'Create' button is located in the top right corner. The main area displays a table with two columns: 'Title' and 'Type'. The table lists six entries:

Title	Type
Geolocation	ContextHub Store Configuration (generic)
Surferinfo	ContextHub Store Configuration (generic)
Profile	ContextHub Store Configuration (generic)
Emulators	ContextHub Store Configuration (generic)
Persona	ContextHub UI Mode
Device	ContextHub UI Mode

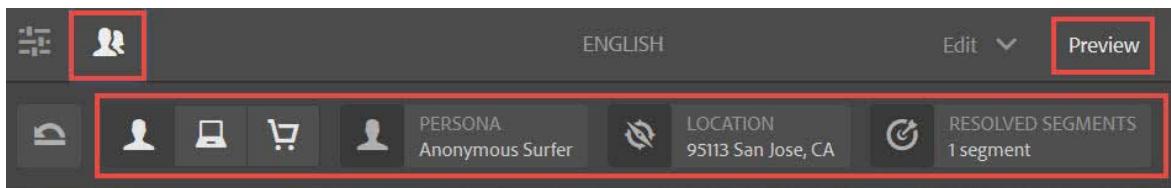
## ContextHub Toolbar

In a page, you can view the **ContextHub** toolbar in **Preview** mode.

The ContextHub toolbar displays data from ContextHub stores and enables you to change store data. It is useful for previewing content that is determined by data in a ContextHub store.

The screenshot shows a website page in 'Preview' mode. The toolbar at the top includes icons for navigation, persona, location, and resolved segments, all of which are highlighted with a red box. The persona section shows 'Anonymous Surfer'. The location section shows '95113 San Jose, CA'. The resolved segments section shows '1 segment'. Below the toolbar, the website content features a banner for 'WE.RETAIL' with the text 'All-new winter collection' and 'BUILT FOR THE COLDEST'.

The toolbar consists of a series of UI modes that contain one or more UI modules.

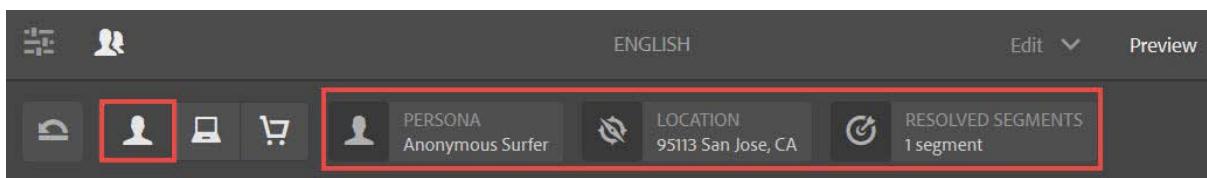


- UI modes are icons that appear on the left side of the toolbar. When you click or tap an icon, the toolbar reveals the UI modules that it contains.
- UI modules display data from one or more ContextHub stores. Some UI modules also let you manipulate store data.

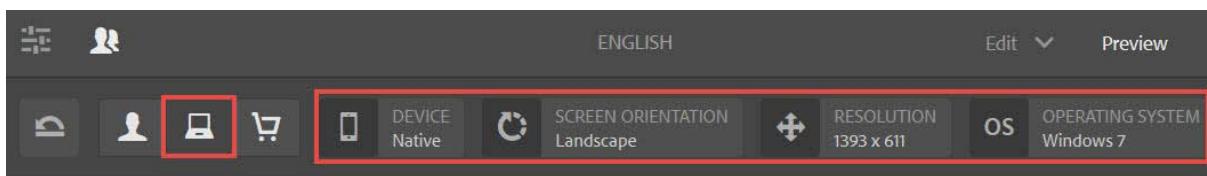
## ContextHub UI Modes

ContextHub has the following UI modes:

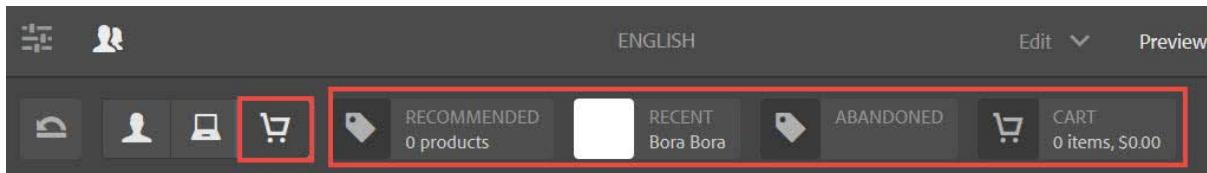
- **PERSONA**—provides information about the visitor such as profile, location, and the segments associated with the visitor.



- **DEVICE**—provides information about the visitor's device such as type of device and screen orientation.



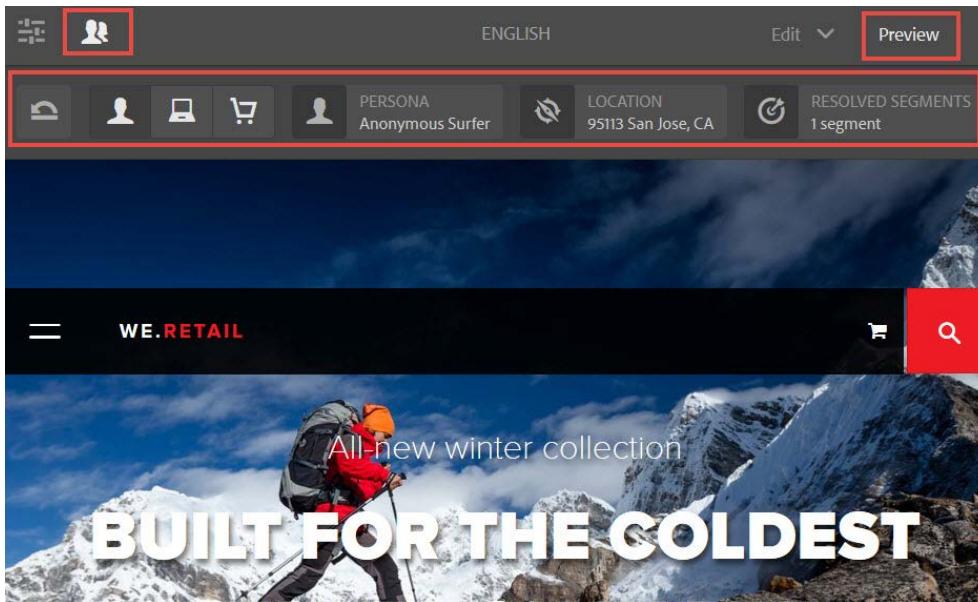
- **COMMERCE**—provides visitor's cart details and values such as promotions, vouchers, and so on.



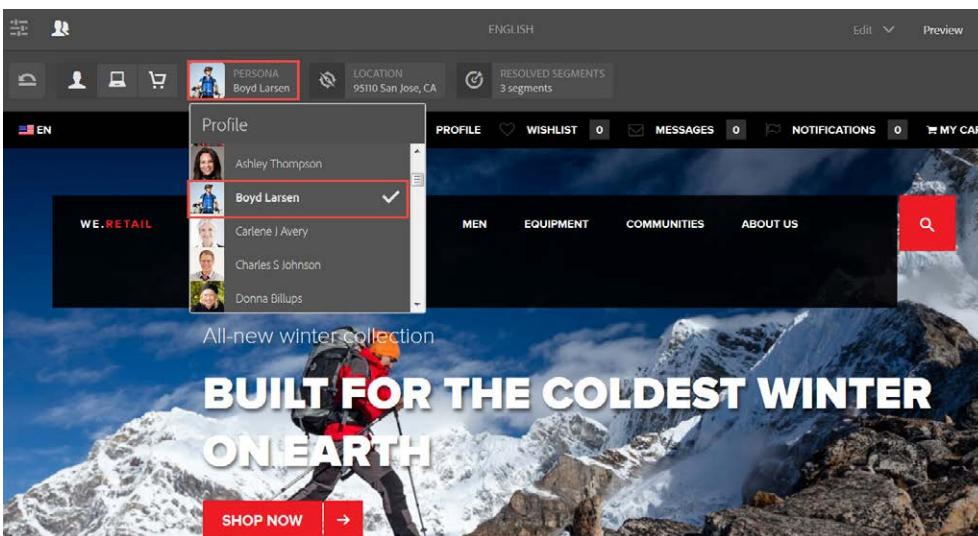
## Exploring User Profiles in ContextHub

Let us see how to explore user profiles in ContextHub:

1. Navigate to **Sites > We.Retail > United States > English**, and then open the **Training\_<username>** page in **Preview** mode.
2. Click **ContextHub** on the toolbar. ContextHub modes, **PERSONA**, **DEVICE**, and **COMMERCE** appear.

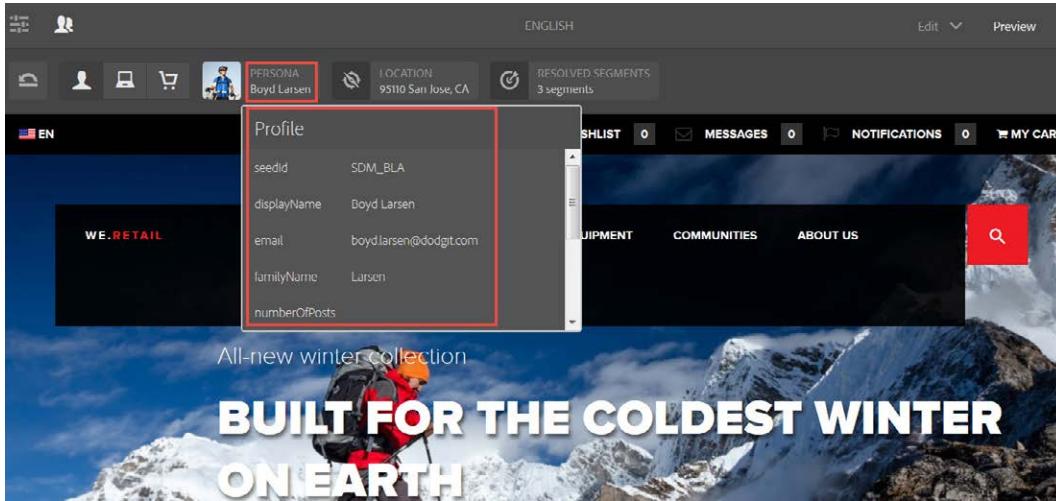


3. Click the **PERSONA** icon to display a list of profiles. Select **Boyd Larsen** from the drop-down.



4. When you click:

- a. PERSONA, **Boyd Larsen** visitor details such as name, email, and gender are displayed.

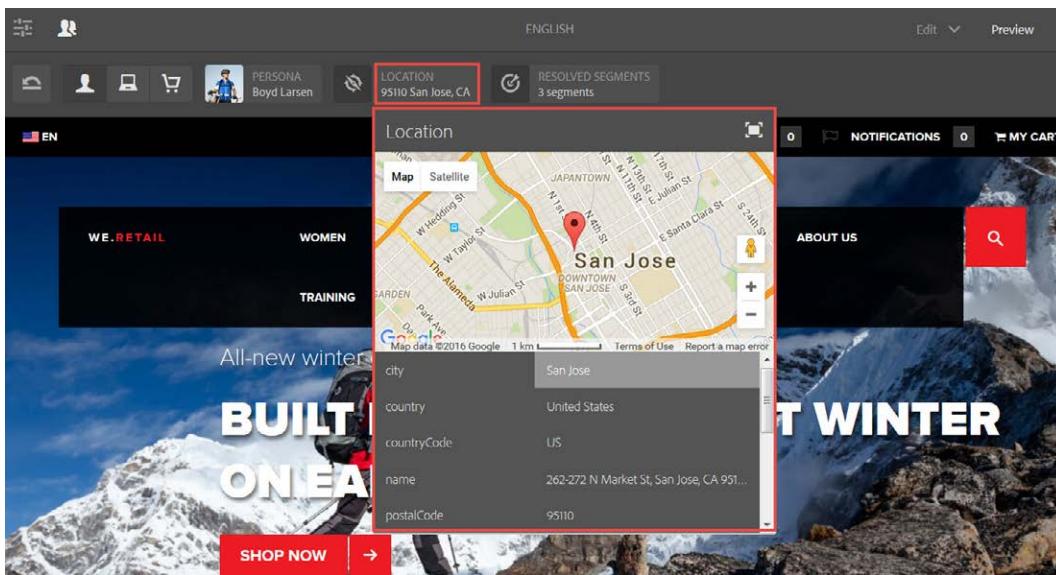


The screenshot shows a website interface with a navigation bar at the top. A red box highlights the 'PERSONA' button, which is currently active and displays 'Boyd Larsen'. Below the persona button, a modal window is open, also highlighted by a red box. This modal contains the following visitor profile information:

seedId	SDM_BLA
displayName	Boyd Larsen
email	boyd.larsen@dodgt.com
familyName	Larsen
numberOfPosts	

The background of the website features a snowy mountain landscape and promotional text: 'All-new winter collection' and 'BUILT FOR THE COLDEST WINTER ON EARTH'.

- b. LOCATION, a map, latitude and longitude details of the visitor's location are displayed.

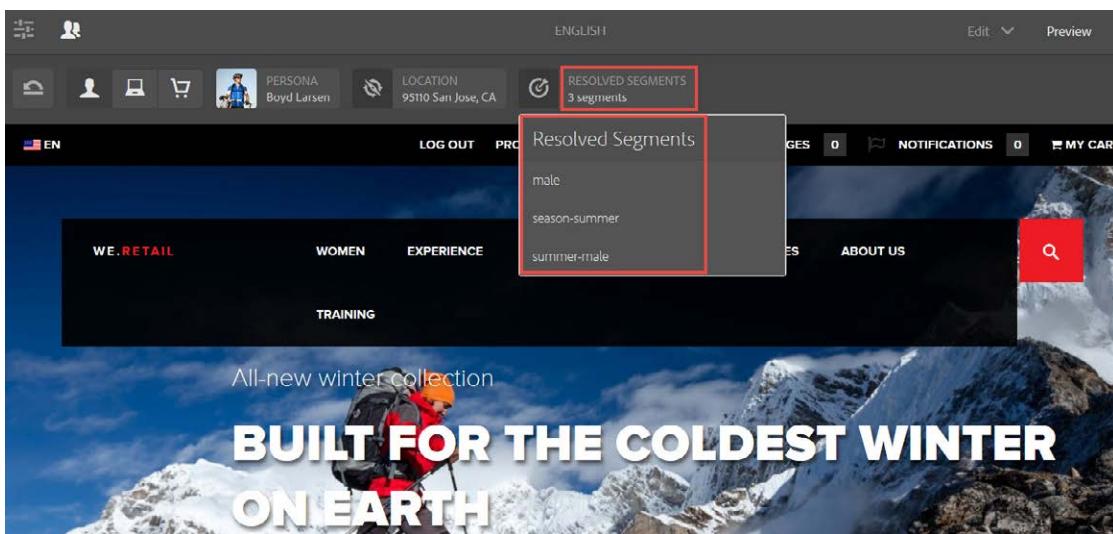


The screenshot shows a website interface with a navigation bar at the top. A red box highlights the 'LOCATION' button, which is currently active and displays '95110 San Jose, CA'. Below the location button, a modal window is open, also highlighted by a red box. This modal contains the following location information:

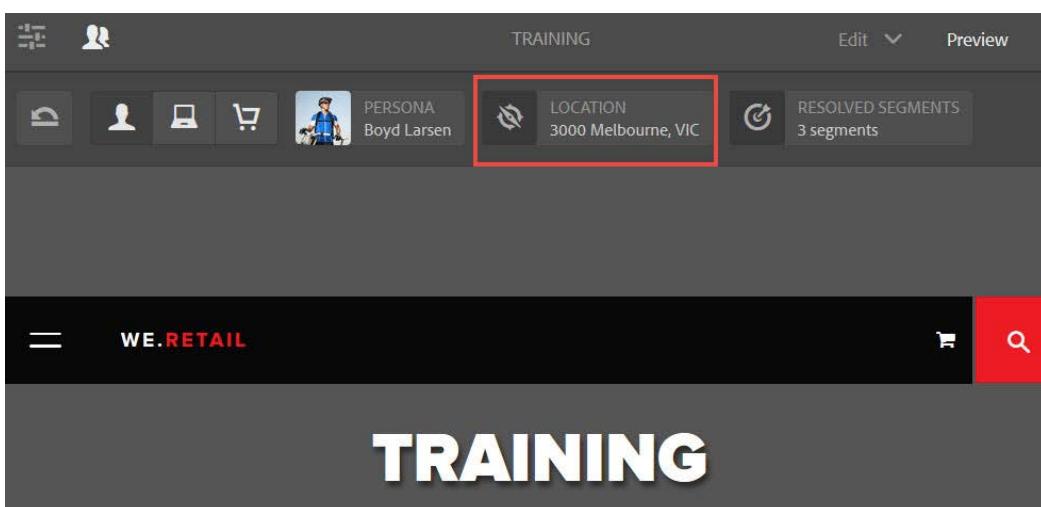
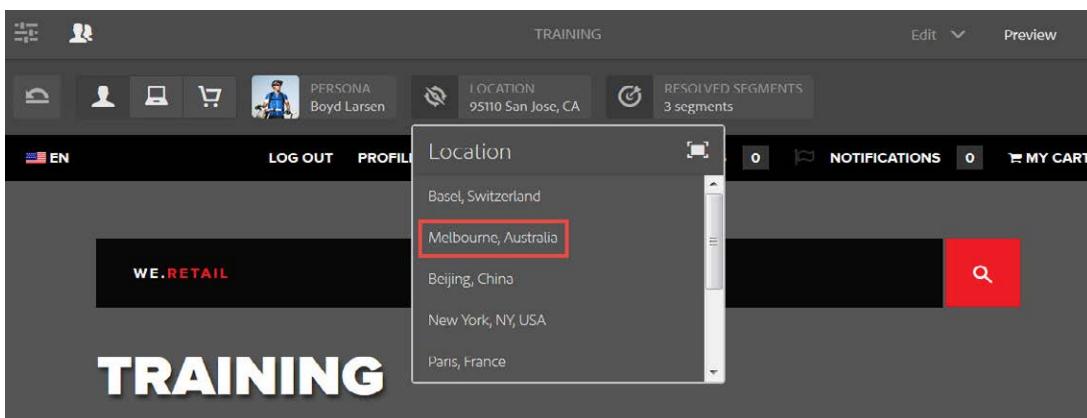
city	San Jose
country	United States
countryCode	US
name	262-272 N Market St, San Jose, CA 951...
postalCode	95110

A map of San Jose, California is displayed in the modal, showing the location marked with a red pin. The background of the website features a snowy mountain landscape and promotional text: 'All-new winter collection' and 'BUILT FOR THE COLDEST WINTER ON EARTH'.

c. RESOLVED SEGMENTS, the list of segments that the visitor is mapped to display.



5. You can change the location of the visitor (for example, to Melbourne, Australia) using the LOCATION tab.



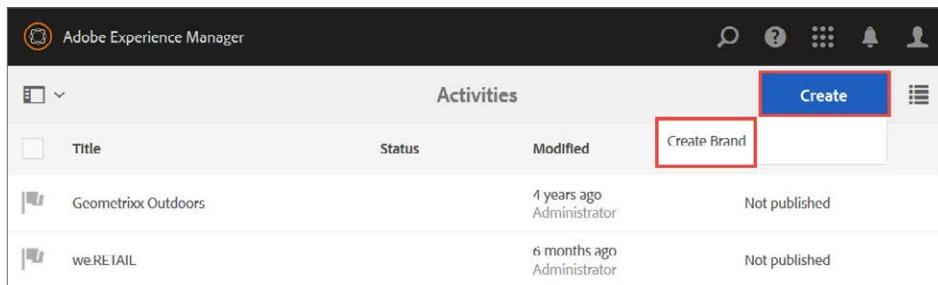
# Personalization and Content Targeting in Adobe Experience Manager

The steps involved in personalization and content targeting process are:

1. Create a brand
2. Create an activity for the brand
3. Create experiences
4. Map experiences with audiences
5. Target a component
6. Simulate experiences

In personalization and targeting process first you need to:

1. Create a brand



The screenshot shows the 'Activities' section of the Adobe Experience Manager interface. At the top right, there is a blue 'Create' button. To its left, a red box highlights a smaller button labeled 'Create Brand'. Below these buttons is a table with three rows of data. The columns are labeled 'Title', 'Status', and 'Modified'. The first row contains 'Geometrixx Outdoors', 'Not published', and '4 years ago Administrator'. The second row contains 'we.RETAIL', 'Not published', and '6 months ago Administrator'. The third row is partially visible.

Title	Status	Modified
Geometrixx Outdoors	Not published	4 years ago Administrator
we.RETAIL	Not published	6 months ago Administrator

2. Create an activity for the brand has three sub-steps:
  - a. **Details:** Select **ContextHub (AEM)** target engine add a **Name** to the activity
  - b. **Target:** Add audience to the activity and create and map audiences with experiences
  - c. **Goals & Settings:** For scheduling the Targeting process

The screenshot shows the 'Configure activity wizard' with the 'Details' tab selected. The 'Name' field contains 'Home Page Hero'. The 'Targeting engine' dropdown is set to 'ContextHub (AFM)'. The 'Select a Target Configuration' dropdown is open. The 'Activity type' dropdown is open. The 'Objective' text area contains placeholder text: 'Enter an objective. This can be the goal and/or a description of the activity.'

Following the above steps, you will have a brand-related activity, and audiences are mapped with experiences, that can be used for content targeting.

 **Perform Task 1: Create an activity and map audience with experiences to manage marketing efforts,** from the Lab Activity section.

## Content Targeting

Content targeting allows you to:

- include components on your webpage that dynamically displays personalized content based on available visitor information.
- configure any component in the Adobe Experience Manager authoring system to display targeted content by assigning an activity to it.

You can author targeted content using the Targeting mode of the Touch UI.

For authoring targeted content:

1. Open the page, where you want to place the targeted content.
2. Add components to the page.
3. Select Targeting mode from the toolbar.
4. Select a brand and an activity to see the experiences.
5. Add offers to an experience by creating offers or using offers from a library.
6. Simulate user experiences using ContextHub.

### Simulating an Experience

Once a page is created with targeted content, verify the mappings of audiences and their experiences.

Let's simulate a visitor's experience to verify how an experience changes based on the visitor. When simulating, load different user profiles and see the targeted content for that user.

The criteria that determine the content when simulating a visitor experience are:

- Data in the user's session store (through ContextHub)
- Activities that are live
- Rules that define the segments
- Content of the experiences in the target components

Tools used for simulation are:

- Activity in Targeting mode: The page displays the offers for a user that is currently selected in ContextHub. You can edit the offers that target a user.
- Preview mode: Use ContextHub to select the users and locations that satisfy the criteria of the segments that your experiences are based on. When the ContextHub selections change, the targeted content changes accordingly.



Perform **Task 2: Create and simulate the targeted content**, from the Lab Activity section.

## Additional Information on Content Targeting

You can also use Adobe Target for creating personalized and targeted content (you must have a valid Adobe Target account to use Adobe Target). If you are using Adobe Target, you must configure the integration first. See instructions for [Integrating with Adobe Target](#).

If you use Adobe Target as the targeting engine all the steps described in Personalization and Content Targeting in Adobe Experience Manager section remain the same except the Targeting process.

### Targeting Process of Adobe Target

Targeting mode enables you to configure several aspects of an activity. Use the following three-step process for creating targeted content for a brand activity:

- Create: Add or remove experiences, and add offers for each experience.
- Target: Specify the audience that each experience targets. You can target a specific audience and if using A/B testing decide what percentage of traffic goes to which experience.
- Goals & Settings: Schedule the activity and set the priority. You can also set success metric goals.

If you have integrated Adobe Experience Manager with Adobe Target or want to integrate in future, you can refer to [Targeting in Adobe Target](#) to understand the process in detail.

# Landing Pages

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The landing pages feature allows marketers to import the design and content right into an Adobe Experience Manager page. The web developers prepare the HTML and additional assets. You can import these assets into a page. This functionality helps to create marketing landing pages that are dynamic and easy to create.

## Defining Landing Pages

Landing pages are single or multi-page sites that lead to the "endpoint" of a marketing outreach. A landing page can serve various purposes, but all have one thing in common—the visitor should fulfill a task, which is what defines the success of a landing page.

Landing pages let you narrow your focus and remove the clutter from your pages that could distract your visitor from taking the action you want them to take. It allows you greater control to direct them and helps them find what they're looking for much faster—and this, in turn, can ripple out to affect your search engine rankings too.

## Types of Landing Pages

Landing pages can be:

- Desktop landing pages—used in desktops.
- Mobile landing pages—which is the mobile version of the landing page. It is the child page of the desktop landing page.

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 **NOTE:** If the desktop landing page is deleted or deactivated, the mobile landing page is also deleted or deactivated.

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## Benefits of Using Landing Pages

The benefits of using landing pages are:

- Provides a better user experience because you are providing personalized content
- Increases conversion rates as visitors are able to precisely find what they are looking for
- Provides more opportunities for visitors to relate to your content

## Components of Landing Pages

To make parts of the landing page editable within Adobe Experience Manager, the content of landing page HTML must be mapped with the Adobe Experience Manager components directly.

The design importer understands the following components of the page:

- Text—any form of text
- Title—content in the form of headings
- Image—images included in the page
- Call to Action
  - › Click through Link
  - › Graphical Link
- Lead Form—used to capture user information
- Paragraph System (parsys)—used to add content to the existing components, and to add new components

In addition to the above components, you can also add custom components to the landing page.

### Call to Action Component

A landing page design can have several links in the form of text, image, buttons, and so on.

Call to Action (CTA) is an image or text that prompts visitors to take action. It is literally, a "call" to take an "action". For example, "Download an eBook", "Sign up for a webinar", "Get a coupon", or "Attend an event".

Click through links and Graphical links are CTA components and have similar options. A Click through Link has additional rich text options.

#### *Click through Link*

A Click through link is a text link with a target URL. This component is used to take the visitor to the target URL specified in the component properties.

#### *Graphical Link*

A Graphical link is an image that, when clicked, takes the visitor to a target URL. The image can be a simple button or any graphical image used as a background. When the image is clicked, the user is taken to the target URL specified in the component properties.

## Creating Landing Pages

The landing pages feature in Adobe Experience Manager allows marketers to work with web designers at agencies or internal creative teams to create page designs that can be imported into Adobe Experience Manager, and the landing pages can still be edited by the marketers and published under the same governance as the rest of the Adobe Experience Manager-powered sites.

To create a landing page, follow these steps:

1. Create an importer page.
2. Prepare HTML for importing (this step is performed by a web developer).
3. Import the design package.

### Creating an Importer Page

Before you import the Landing Page design, you must create an importer page (for example, under an activity). The importer page template lets you import your full HTML landing page. The page contains a drop box where you can import the landing page design package using drag and drop functionality.

### Importing a Design Package

After creating a blank landing page, you can import a design package onto it. Let's see how this works by performing a task.



Perform Task 3: Create an importer page and import the page design package, from the Lab Activity section.

## Landing Page Actions

You can perform different actions on landing pages, with a few of those actions listed here:

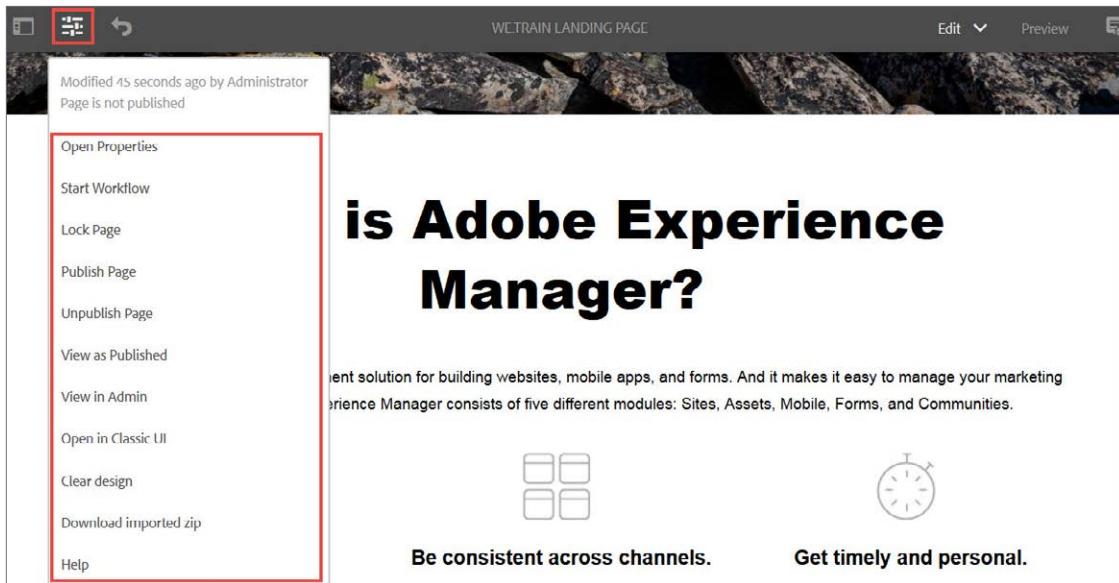
- Modify and add components to the landing page:
  - › Double-click the existing component to open and edit as you edit any other component.

- › Drag and drop components from the Side Panel to the landing page.

## Additional Actions

Similar to pages you can perform the following actions on landing pages, except **Clear design** and **Download imported zip**.

- **Clear design:** In case you want to re-import your landing page design package after making some changes to it, you can "clear" the landing page by clicking Clear design deletes the imported landing page and creates a blank landing page.
- **Download imported zip:** Lets you record which zip was imported with a particular landing page. Note that changes made on a page are not added to the zip.



# Lab Activity

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## Scenario

XYZ is an organization in the education sector. They are keen on expanding their digital marketing opportunity to target global customers. They are looking for a solution that segments customer/audience information based on their purchasing pattern—across web and mobile channels.

## Challenge

- Creating a unique brand experience that maps to different audience segments
- Testing the brand experience by simulating different visitor profile
- Creating landing pages for better user experience and increased customer conversion

## Overview

To complete the challenge, you will need to:

- Create an activity to create personalized content for the visitors
- Map experiences with audiences for better targeting
- Simulate experiences based on visitor profiles to test the targeted content
- Create landing pages by importing the design package directly onto the page

## Pre-requisites

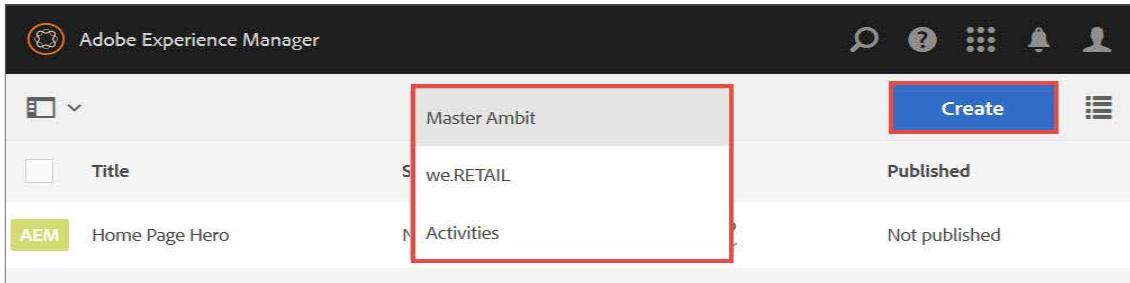
- You should have performed the Adobe Experience Manager installation steps, and have a running Author instance and Publish instance.
- USB content with **We.Train Landing Page** design package.

## Steps

### Task 1: Create an activity and map audience with experiences to manage marketing efforts

Let's define and organize marketing efforts:

1. From the **Personalization** console (**Navigation > Personalization**), navigate to **Activities > we.RETAIL > Master Amit**.

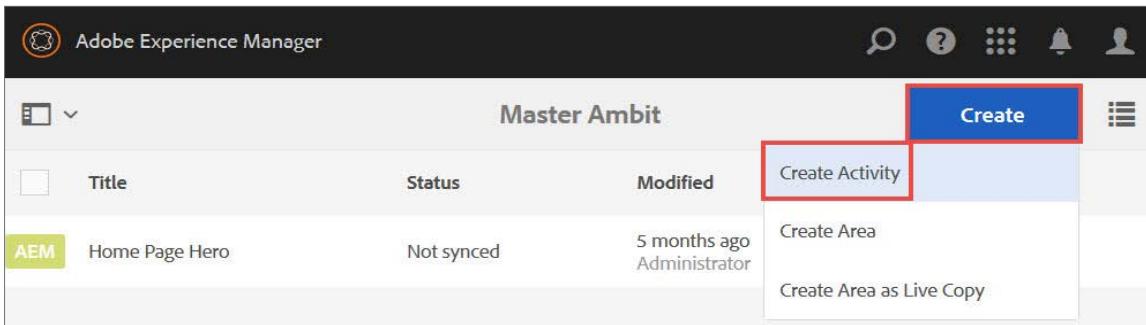


The screenshot shows the 'Master Amit' activities list in the AEM Personalization console. The list includes the following items:

Title	Status	Modified
we.RETAIL	Published	
Home Page Hero	Not published	

A red box highlights the 'we.RETAIL' row. The 'Create' button in the top right corner is also highlighted with a red box.

2. Click **Create > Create Activity** from the actions bar.



The screenshot shows the 'Master Amit' activities list with the 'Create' button in the top right corner highlighted with a red box. A dropdown menu is open, showing the following options:

- Create Activity (highlighted with a red box)
- Create Area
- Create Area as Live Copy

3. In **Configure activity wizard** has three tasks; **Details**, **Target**, and **Goal & Settings**.

4. In **Details** add the following:

- Name: **Training Activity\_<username>**
- Targeting engine: Select **ContextHub (AEM)** from the drop-down

5. Click **Next**.

Configure activity wizard

Details      Target      Goals & Settings

Name \*

Training Activity

Targeting engine

ContextHub (AEM)

Select a Target Configuration

Activity type

Objective

Enter an objective. This can be the goal and/or a description of the activity

Cancel      Next

6. In **Target** perform the following:

- Click **Add Experience**, select an existing audience for example, **Female (CH)** from **Choose Audience** dialog box.

Configure activity wizard

Details      Target      Goals & Settings

+ Add Experience

AUDIENCES

EXPERIENCES

Back      Next

Type	Name	Source	Change Log
Female	Female Over 30 (CH)	AEM	Updated 14 May 2016
Female	Female Under 30 (CH)	AEM	Updated 14 May 2016
Female	<b>Female (CH)</b>	AEM	Updated 14 May 2016
Male	Male Over 30 (CH)	AEM	Updated 14 May 2016
Male	Male Under 30 (CH)	AFM	Updated 14 May 2016
Male	Male (CH)	AEM	Updated 14 May 2016

For this audience you have to map it with an experience.

- Click **Add Experience** beside **Female (CH)** to map the audience with experience. **Experience Name** dialog box appears.

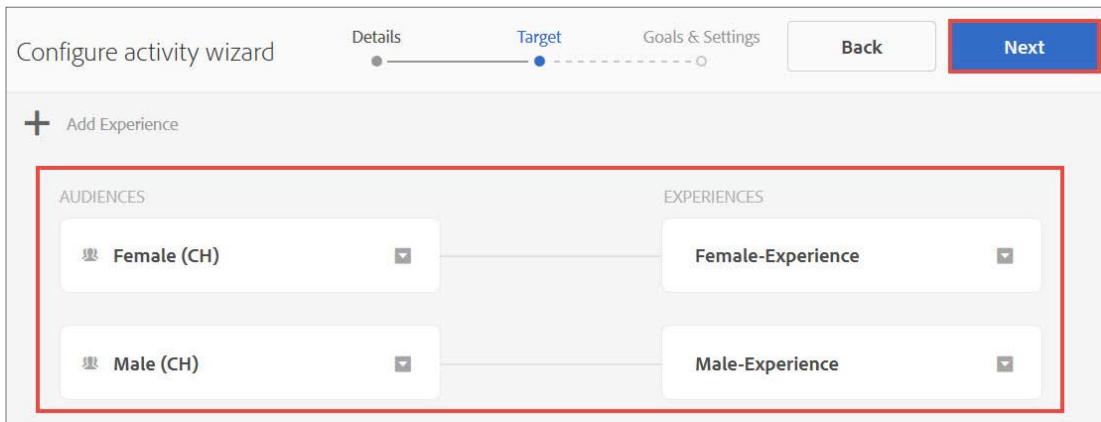
- Enter name for example, **Female-Experience** in **Enter an experience name** field, and then click **OK**.

Experience Name X

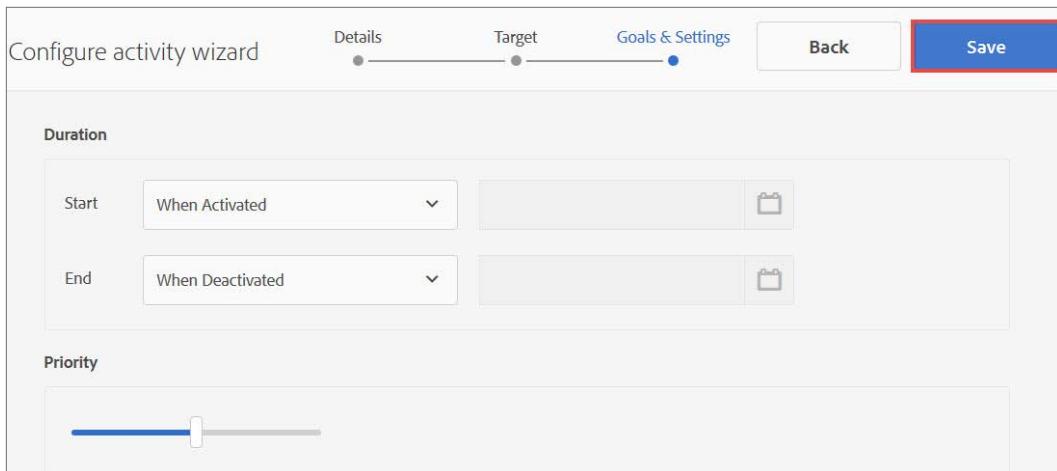
Enter an experience name \*

Cancel Ok

7. Follow Steps 6a-c to add **Male (CH)** audience, and to map it with **Male-Experience**, and then **Next**.



8. In **Goals & Settings** you configure Targeting to work during a specific time period. Do not make any changes, and then click **Save**.



Your activity was saved message appears.

The screenshot shows a user interface for a 'Configure activity wizard'. At the top, there's a navigation bar with tabs: 'Detail' (highlighted), 'Settings', 'Back', and a large blue 'Save' button. A green rectangular box highlights a success message: 'SUCCESS Your activity was saved.' Below this, the 'Duration' section contains two rows: 'Start' set to 'When Activated' with a calendar icon, and 'End' set to 'When Deactivated' with a calendar icon. Under 'Priority', there is a horizontal slider with a white handle. The background of the wizard is light gray.



## Task 2: Create and simulate targeted content

To create a targeted component in a page:

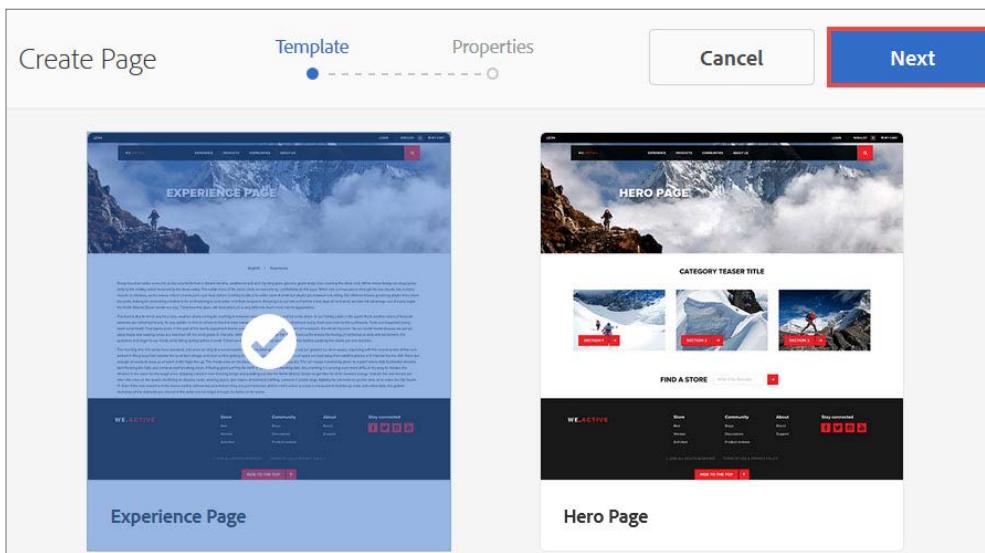
1. Navigate to **Sites > We.Retail > United States > English.**

The screenshot shows the Adobe Experience Manager interface for the English version of the We.Retail site. The left sidebar lists 'Equipment', 'United States', 'We Retail', and 'Sites'. The main content area displays two live copies of the website: 'Equipment' and 'Products'. The 'Create' button is highlighted with a red box in the top right corner of the interface.

2. Click **Create > Page** from actions bar.

The screenshot shows the 'Create' menu in Adobe Experience Manager. The 'Page' option is highlighted with a red box. Other options include 'Site', 'Live Copy', 'Launch', 'Catalog', and 'CSV Report'.

3. Select the **Experience Page** template, and then click **Next**.



4. Provide Name as **summer**, Title as **Summer\_<username>**, and then click **Create**.

Create Page      Template      Properties      Back      **Create**

**BASIC**    ADVANCED

**Title and Tags**

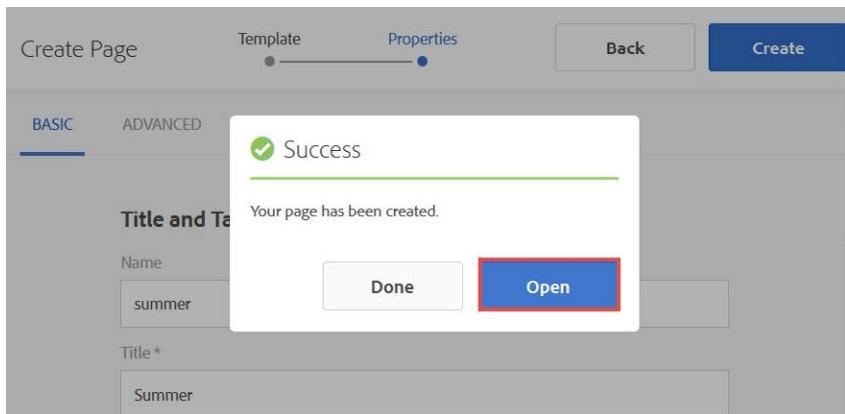
Name	summer
Title *	Summer

---

 **NOTE:** It is important to create your page with a unique identifier so that you can identify your page amongst those of your peers' unique identifiers being created in the same environment.

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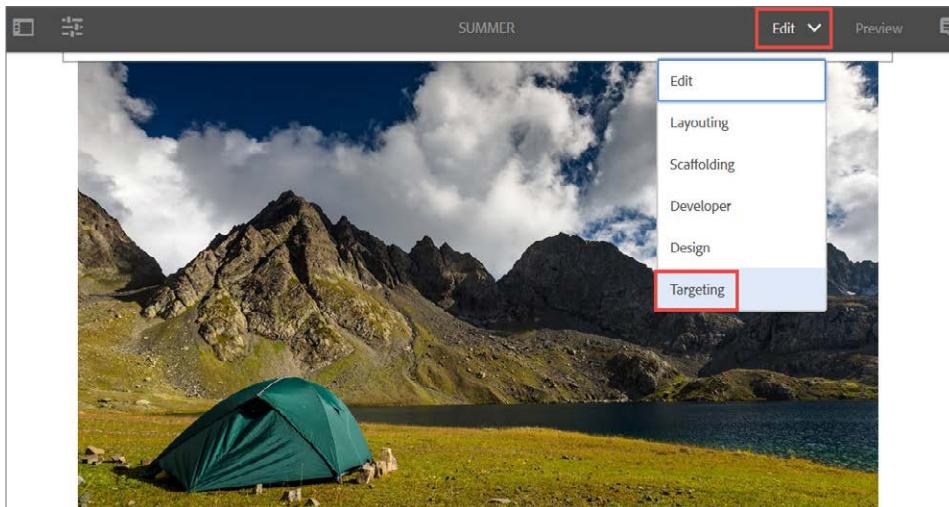
5. Click **Open** from **Success** dialog to open **Summer\_<username>** page. Ensure the page is in **Edit** mode.



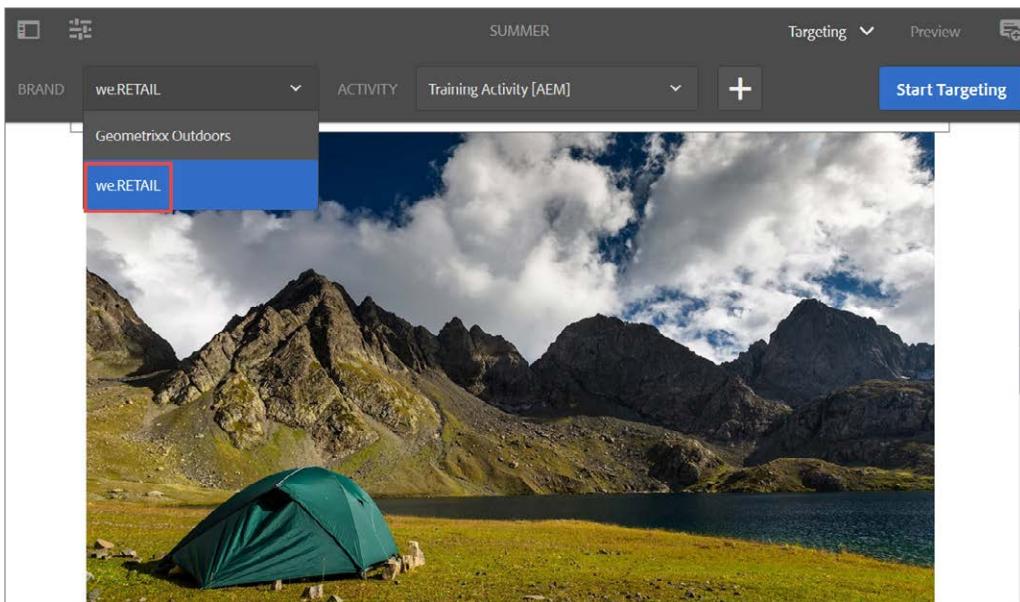
6. Click the **Side Panel** on the top-left of the screen.  
 7. Drag and drop any image from the **Assets** browser onto the **Drag component here** area.  
 This will be the default content for the component (if there are no targeted activities on the component).



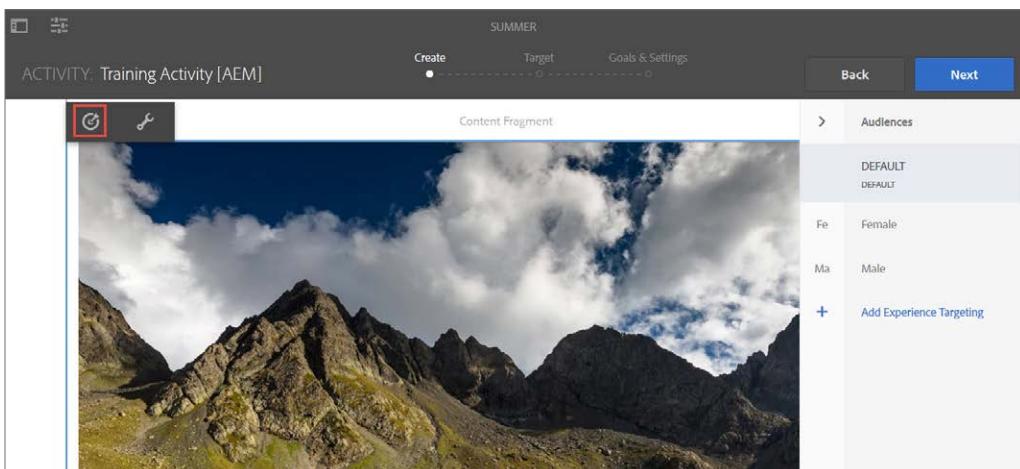
8. Select **Targeting** mode from the **Edit** drop-down.



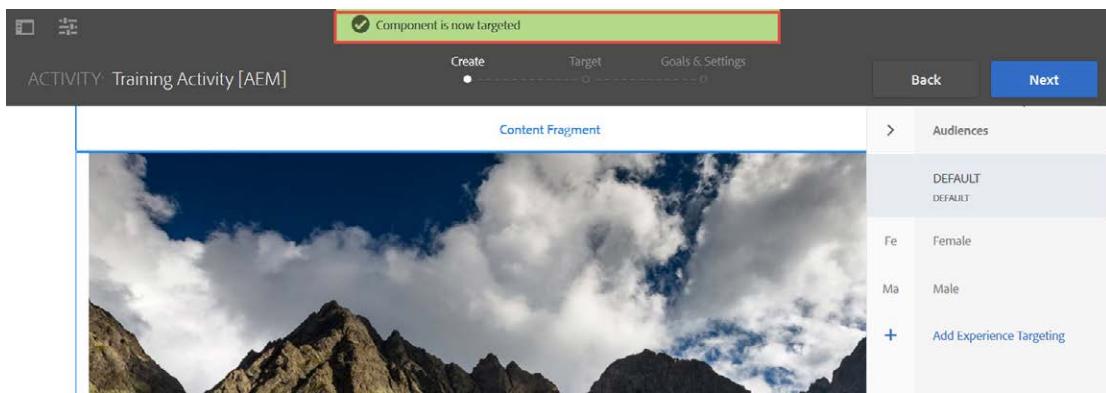
9. Select the **we.RETAIL** Brand and the **Training Activity,\_<username>** from their respective drop-downs, and then click **Start Targeting**.



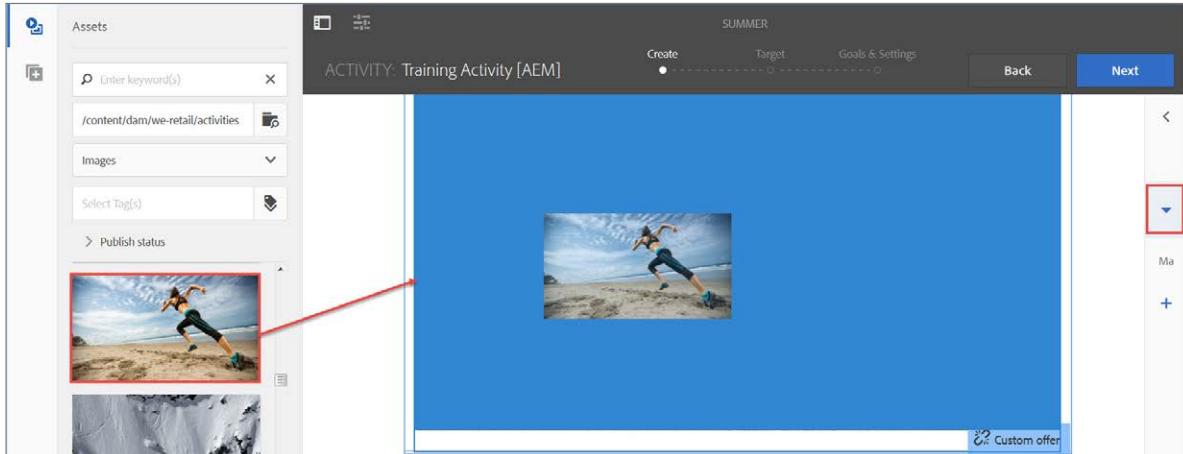
10. Select the image you added, and click **Target** from the component toolbar to make it a targeted component.



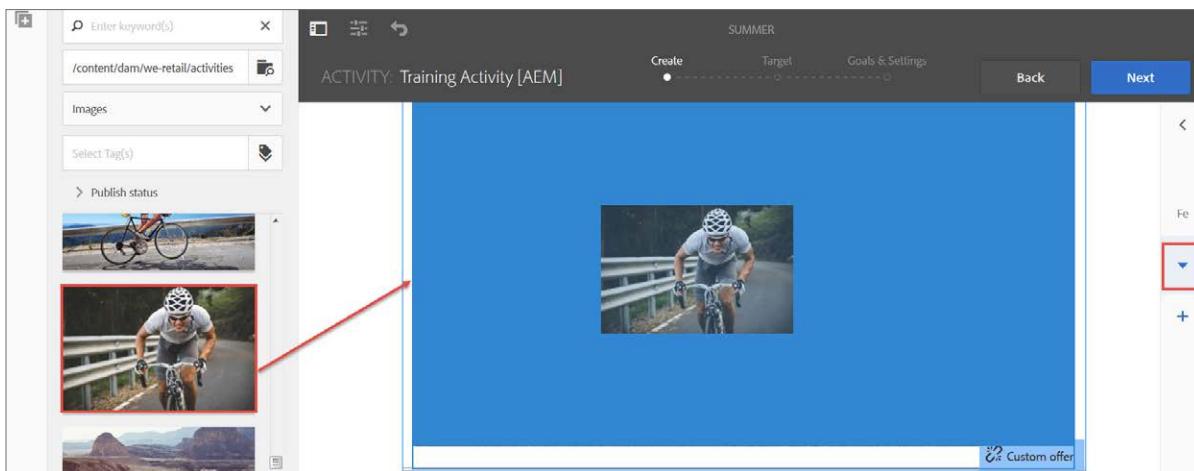
The **Component is now targeted** message appears.



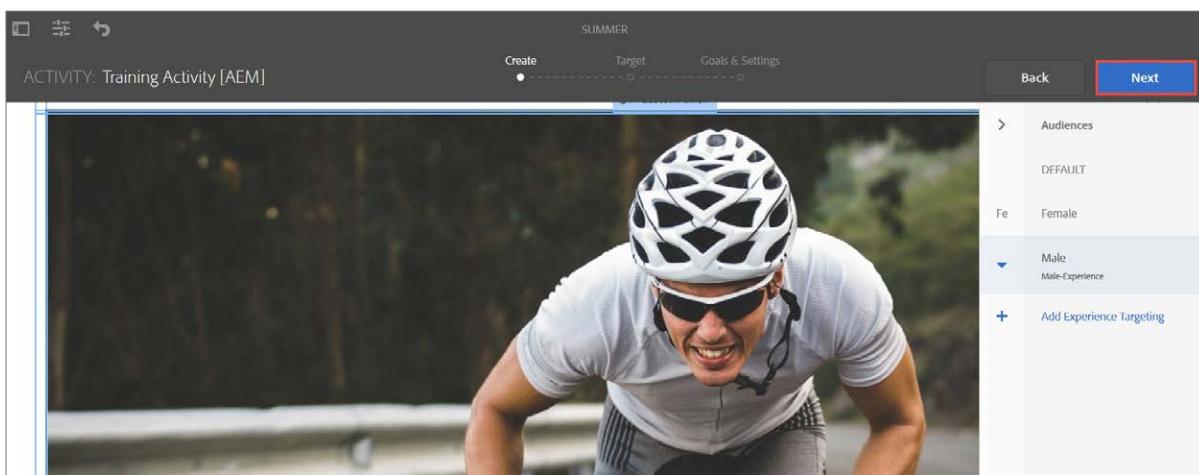
11. Click **Female-Experience** from the **Audiences** panel towards right side of the page, and then select the targeted image that is targeting enabled.
12. Drag and drop a new image into the targeted component, as shown in the following image.



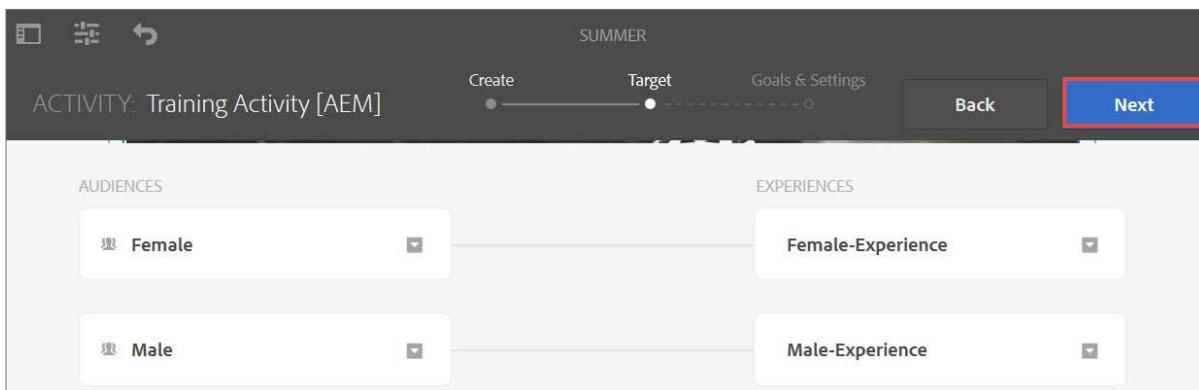
13. Click **Male-Experience** from the targeting menu, and the select the targeted image component.
14. Drag and drop a new image into the targeted component, as shown in the following image.



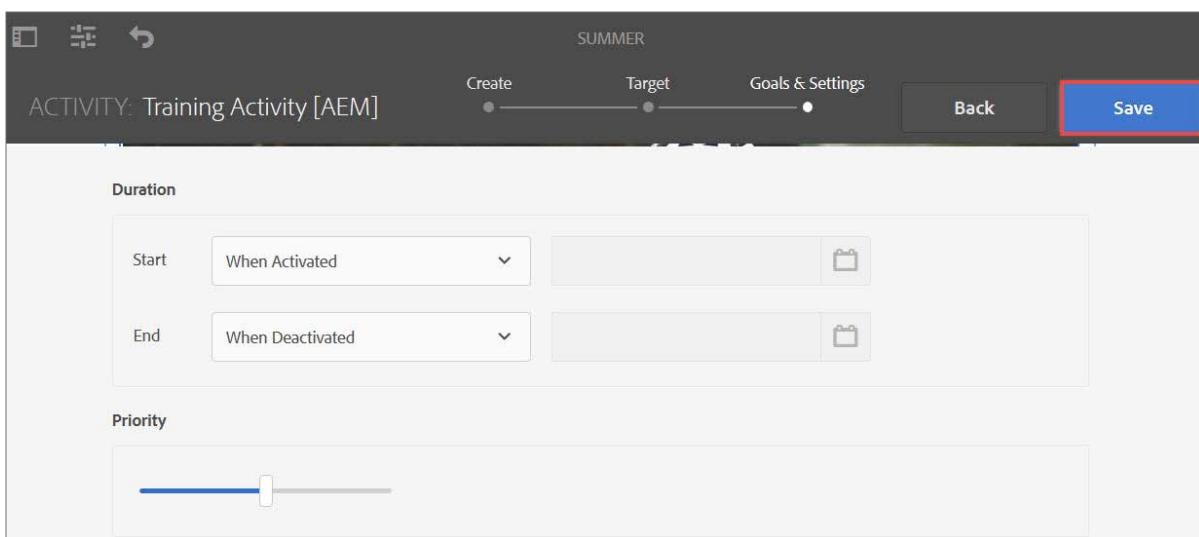
15. Click **Next** to complete **Create** process and move to **Target**.



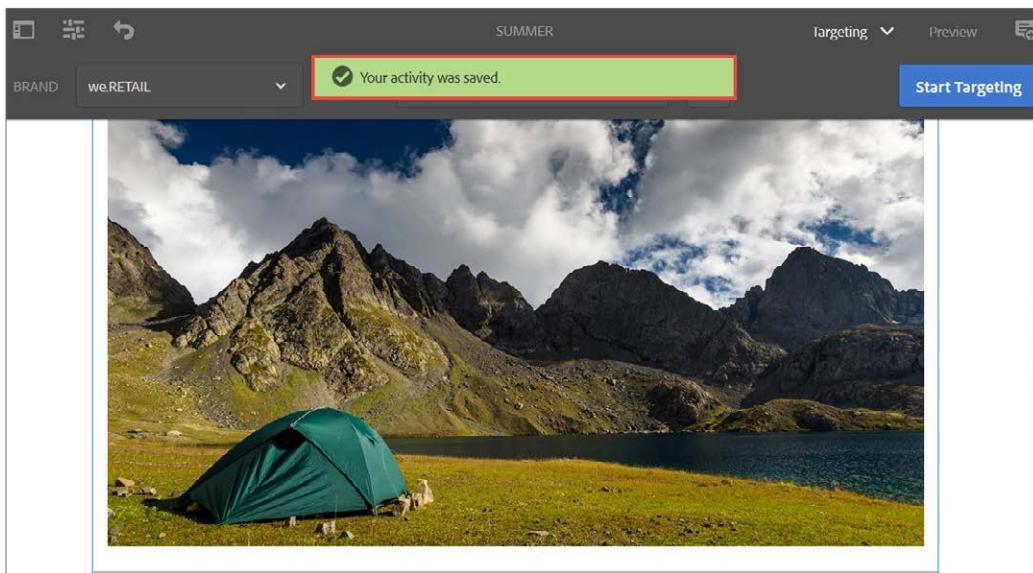
16. In **Target**, you can verify the segments that correlate with the experiences, and then click **Next**.



17. You can configure Targeting to work during a specific time period through **Goals & Settings**, and then click **Save** to save the targeting configurations.



Your activity was saved message appears once the process is completed.

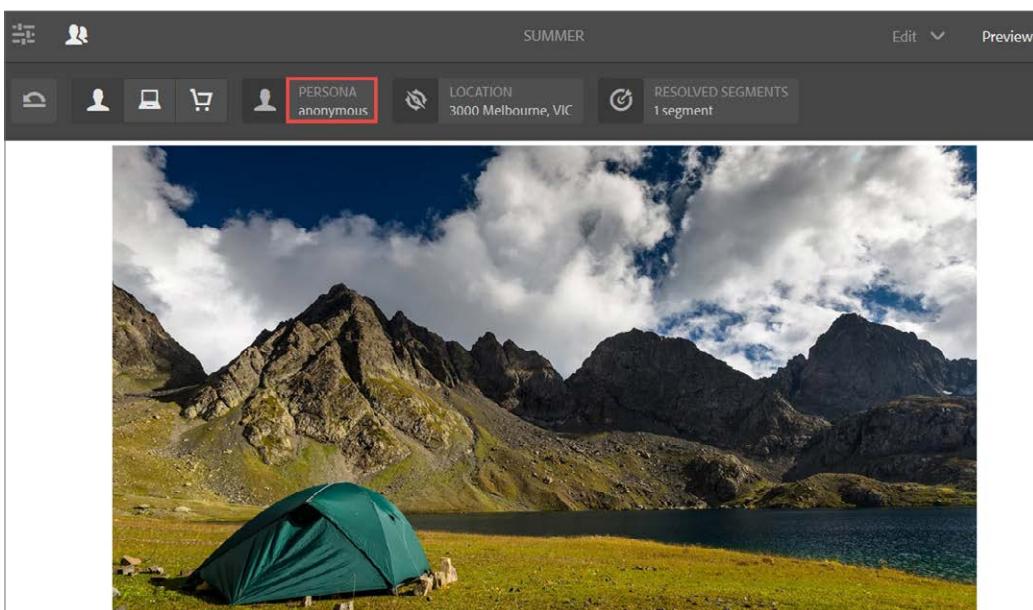


You created a page with targeted content and verified the mappings between audiences and their experiences.

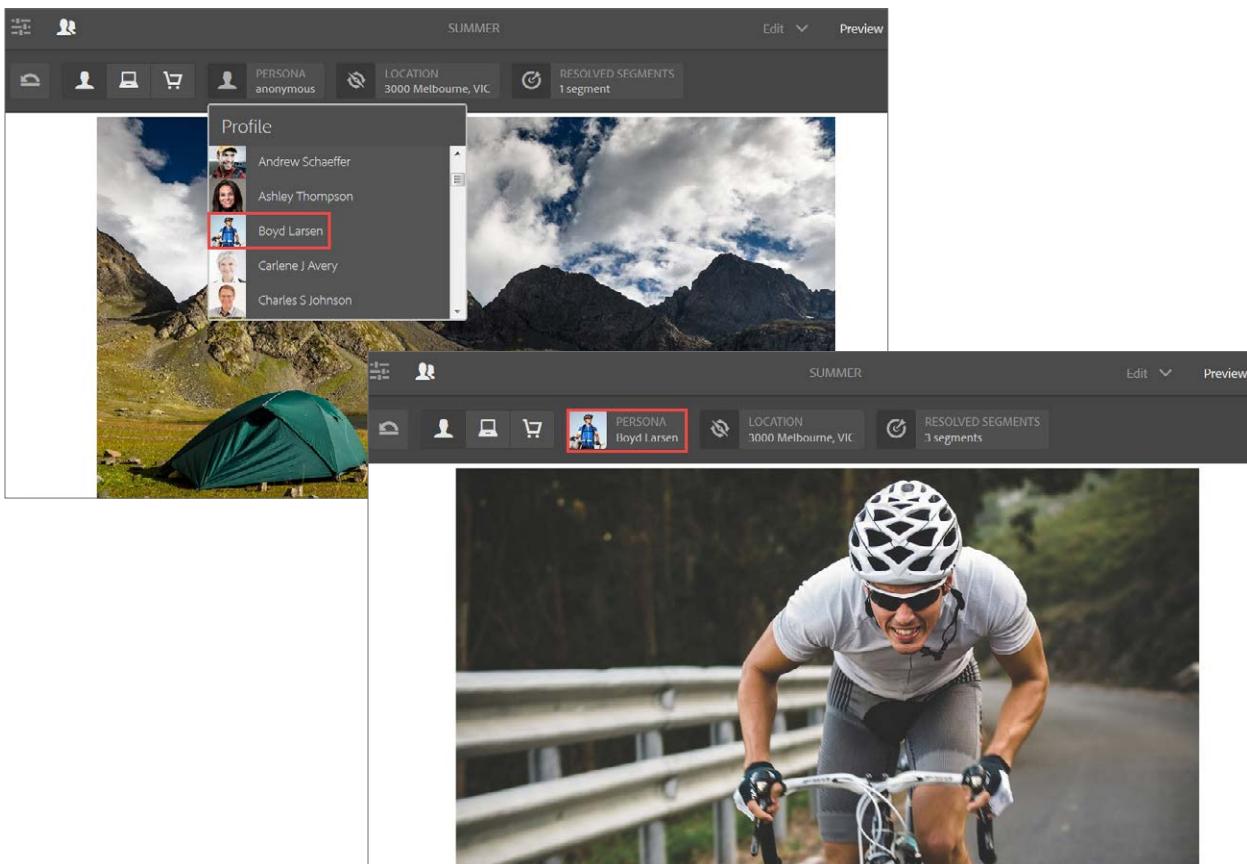
Let's simulate a visitor's experience to verify how an experience changes based on the visitor.

To simulate an experience:

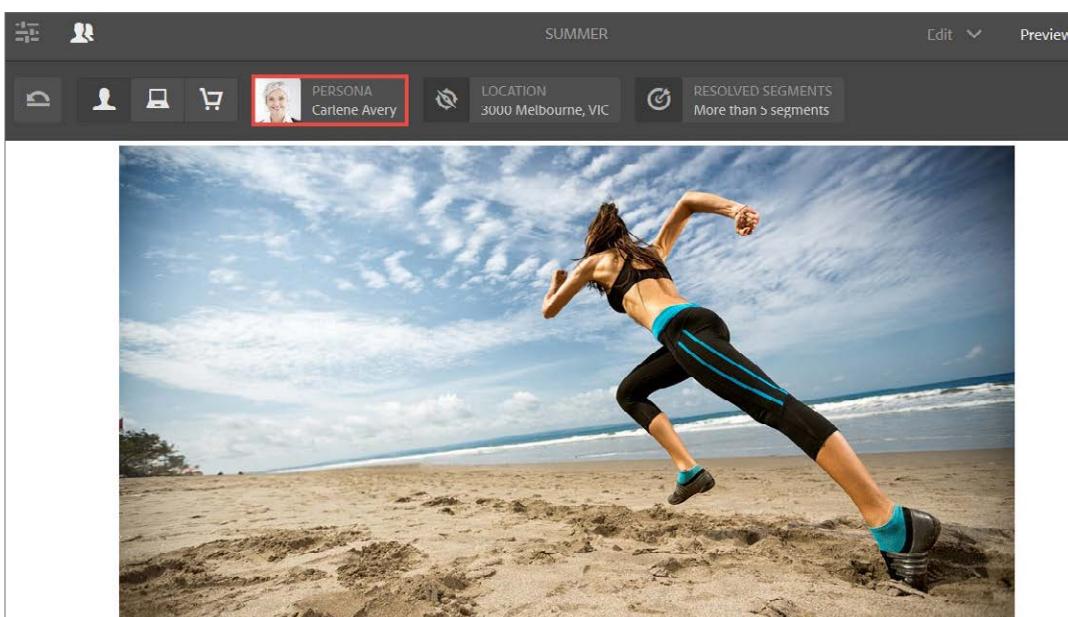
18. Open **Summer\_<username>** with targeted content in **Preview** mode.
19. Click the **ContextHub** icon from the toolbar; all the modes of ContextHub appear.
20. Click **PERSONA** and choose **anonymous**. The image that was added to the **Default** audience appears.



21. Now, choose a male profile (for example, **Boyd Larsen**), and see how the default image changes to display the image associated with the Male (CH) audience.



22. Choose a female profile (for example, **Carlene J Avery**), and see how the default image changes to display the image associated with the Female (CH) audience.





### Task 3: Create an importer page and import the page design package

To create an importer page:

1. Navigate to **Training Activity\_<username>** using the **Column View**. Follow the path highlighted in the image:

The screenshot shows the Adobe Experience Manager interface in Column View. The left sidebar lists 'Campaigns', 'Screens', 'Community Sites', and 'Geometrixx'. The main area shows a breadcrumb path: 'Geometrixx Outdoors > we.RETAIL > Geometrixx'. The center column displays a tree structure with nodes: 'Training Activity' (highlighted with a red box), 'Master Ambit', 'we.RETAIL', 'Campaigns', and 'Sites'. To the right, another breadcrumb path is shown: 'Home Page Hero > Training Activity'. The top right corner features a 'Create' button.

2. Click **Create > Page** from the actions bar.

The screenshot shows the 'Training Activity' page in the Adobe Experience Manager interface. The top right actions bar has a 'Create' button with a dropdown menu. The 'Page' option in this menu is highlighted with a red box. Other options include 'Site', 'Live Copy', 'Launch', 'Catalog', and 'CSV Report'. The breadcrumb path at the top remains the same as in the previous screenshot.

3. Choose the **Importer Page** template and click **Next**.

The screenshot shows the 'Create Page' dialog. At the top, there are tabs for 'Template' (selected) and 'Properties'. Below the tabs are two preview cards: 'Experience' (showing a thumbnail of a page with a target icon) and 'Importer Page' (showing a blue circular icon with a checkmark). The 'Next' button is highlighted with a red box at the top right of the dialog.

4. Provide We.Train Landing Page\_<username> as the Title and click Create.

The screenshot shows the 'Create Page' interface. At the top, there are tabs for 'Template' and 'Properties'. Below them are 'Back' and 'Create' buttons, with 'Create' being highlighted with a red box. Underneath, there are 'BASIC' and 'ADVANCED' tabs, with 'BASIC' selected. The main area is titled 'Title and Tags'. It has fields for 'Name' (empty) and 'Title \*' (containing 'We.Train Landing Page', which is also highlighted with a red box). There are other fields below that are partially visible.

 NOTE: It is important to create your landing page with a unique identifier so that you can identify your landing page amongst those of your peers' landing pages being created in the same environment.

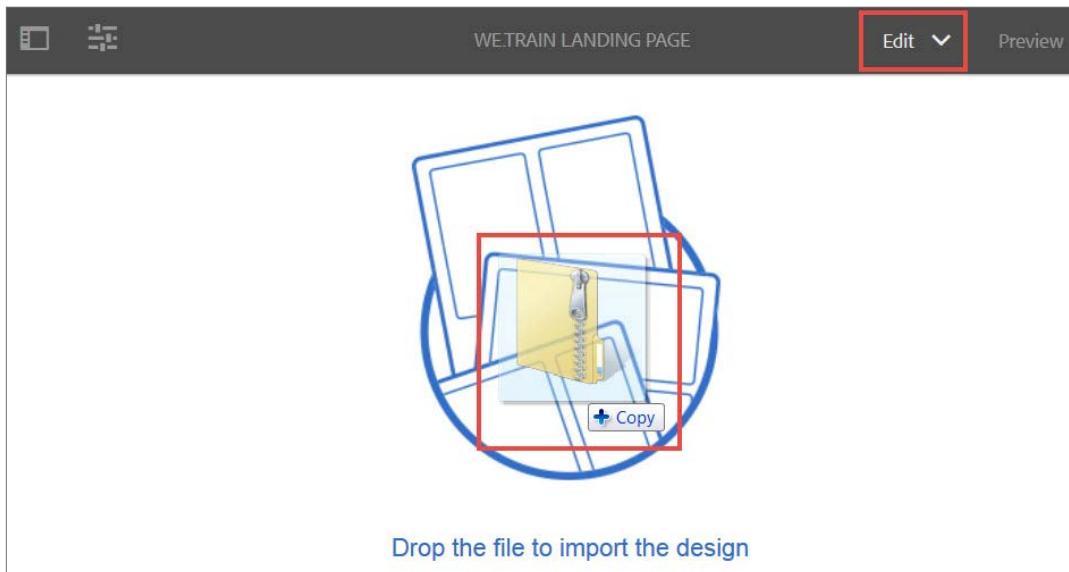
5. Click Open to add design to the We.Train Landing Page\_<username>.

The screenshot shows the 'Create Page' interface after a successful creation. A modal dialog box is displayed in the center. It features a green checkmark icon and the word 'Success'. Below it, a green horizontal line separates the message from the buttons. The message reads 'Your page has been created.' At the bottom of the dialog are two buttons: 'Done' (gray) and 'Open' (blue, highlighted with a red box). Behind the dialog, the 'Title and Tags' section is visible, showing the 'Title' field with 'We.Train Landing Page'.

The design package (**We.Train Landing Page**) is available in the USB folder.

Follow these steps to import the design package onto a blank landing page.

6. Open the **We.Train Landing Page\_<username>** that you created earlier in **Edit** mode.
7. Drag and drop the design package from the USB content folder onto the **Drop asset here** area.



The design is imported to the blank page. Your HTML landing page is ready to be used for the activity.

A screenshot of the Adobe Experience Manager 'Preview' mode interface. On the left, there is a sidebar titled 'Assets' with search fields for 'Enter keyword(s)', 'Enter path', and 'Images'. Below these are sections for 'Select Tag(s)' and 'Publish status'. There are thumbnail previews of a koala and a pair of swim trunks. The main content area shows a landing page with a banner image of a climber on a snowy mountain peak. The banner text reads 'WE.TRAIN' at the top, followed by 'EXPLORING NEW HEIGHTS WITH ADOBE EXPERIENCE MANAGER'. Below the banner, the main heading is 'What is Adobe Experience Manager?'. A descriptive paragraph follows: 'It's a comprehensive content management solution for building websites, mobile apps, and forms. And it makes it easy to manage your marketing content and assets. Adobe Experience Manager consists of five different modules: Sites, Assets, Mobile, Forms, and Communities.' Navigation links 'CONTACT' and 'ABOUT US' are visible at the top right of the preview area.

## Scenario Conclusion

By performing these tasks, you:

- Creating a unique brand experience that maps to different audience segments
- Testing the brand experience by simulating different visitor profile
- Creating landing pages for better user experience and increased customer conversion

## Summary

You should now be able to:

- Define personalization and its use in today's world
- Define the tools used for personalization and content targeting
- Define ContextHub
- Explore user profiles in ContextHub
- Explain the process to create activities
- Map audiences with experiences
- Simulate an experience using ContextHub
- Define landing pages
- Create and import landing pages
- Perform various actions of landing pages

## Appendix

# Installation

## Overview

This chapter provides information and step-by-step instructions to install Adobe Experience Manager. Depending on the type of user, there are multiple ways to install and run Adobe Experience Manager instance.

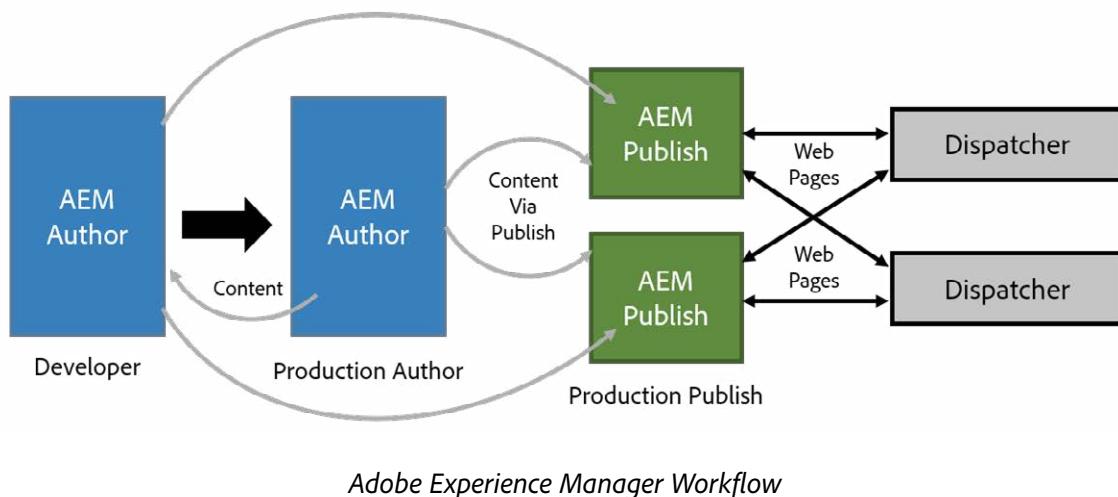
## Objectives

By the end of this chapter, you will:

- Install and run the Adobe Experience Manager Author instance.
- Install and run the Adobe Experience Manager Publish instance.

## What is Adobe Experience Manager?

Adobe Experience Manager is a web-based client-server system for building, managing, and deploying commercial websites and related services. A number of infrastructure-level and application-level functions are combined into a single integrated package.



In Adobe Experience Manager terminology, an “instance” is a copy of Adobe Experience Manager running on a server. Adobe Experience Manager installations usually involve at least two instances, typically running on separate machines:

- **Author:** An Adobe Experience Manager instance used to create, upload, and edit content, and administer the website. After content is ready to go live, it is replicated to the Publish Instance.
- **Publish:** An Adobe Experience Manager instance that serves the published content to the public.

These instances are identical in terms of installed software. They are differentiated only by their configuration.

In addition, most installations use a Dispatcher:

- **Dispatcher:** A static web server (Apache httpd, Microsoft IIS, and so on) augmented with the Adobe Experience Manager Dispatcher module. It caches web pages produced by the Publish instance to improve performance.

## Prerequisites

---

To install Adobe Experience Manager, you need:

- Adobe Experience Manager installation and startup JAR file
- Valid Adobe Experience Manager license key properties file
- JDK version 1.7 (<http://www.oracle.com/technetwork/java/javase/downloads/jdk7-downloads-1880260.html>)
- Approximately 4 GB of free space per instance
- Approximately 4 GB of RAM

The Adobe Experience Manager installation and startup JAR file is also known as the "quickstart" file. You use the file to install Adobe Experience Manager. Once installed, the file is referred to as the Adobe Experience Manager startup file. During installation, you will notice the JAR file creates a root folder called **crx-quickstart**.

# Installing Adobe Experience Manager on Your System

In general, when you want to install Adobe Experience Manager on your system, you would follow this procedure:

1. Create a specific folder structure for your Adobe Experience Manager instance.
  - a. Author instance
    - For Windows: C:/adobe/AEM/author
    - For Mac OS or \*x: /opt/adobe/AEM/author OR /Applications/AEM/author
  - b. Publish instance
    - For Windows: C:/adobe/AEM/publish
    - For Mac OS or \*x: /opt/adobe/AEM/publish OR /Applications/AEM/publish
2. Add the aem-quickstart-6.2.0.jar file along with the license.properties file to the folder, which you created earlier.
3. Rename the jar file to include the run mode as well as the port number. That is, rename the file to the format:

aem-<run mode>-<port number>.jar

For example:

**Author instance:** aem-author-4502

**Publish instance:** aem-publish-4503

The first time you double-click the jar file, Adobe Experience Manager will be installed on your system, creating a root folder called crx-quickstart, which serves as your repository.

A sample folder structure for an Author instance is shown below.

Name	Date modified	Type	Size
crx-quickstart	09-10-2015 7:58 A...	File folder	
aem-author-4502.jar	22-05-2015 5:21 PM	Executable Jar File	484,611 KB
license.properties	13-01-2015 12:21 ...	PROPERTIES File	1 KB



**NOTE:** The Adobe Experience Manager quickstart file is renamed for installation purposes. When running for the first time, the quickstart file will notice that it has to install Adobe Experience Manager. By renaming the file, you use a convention of passing instance name (Webpathcontext) and port number through the file name so that no user interaction is needed during the installation process. If no port number is provided in the file name, Adobe Experience Manager will select the first available port from the following list in this specific order: 1) 4502, 2) 8080, 3) 8081, 4) 8082, 5) 8083, 6) 8084, or a random port.

---



Perform **Task 1: Start an Adobe Experience Manager Author Instance**, from the Lab Activity section.



Perform **Task 2: Start an Adobe Experience Manager Publish Instance**, from the Lab Activity section.

# Starting an Adobe Experience Manager Instance

There are two ways to start an Adobe Experience Manager instance—graphical and by command line. The latter is more powerful because the user has the possibility of providing additional performance-tuning parameters to the Java Virtual Machine (JVM).

## Using the GUI to Start an Adobe Experience Manager Instance

In a Windows or Mac OS environment, you can double-click the **aem-author-4502.jar** file to start an Author instance (or the **aem-publish-4503.jar** file for a Publish instance).

- Installation will take approximately 5-7 minutes, depending on your system's capabilities.
- A dialog box will pop up similar to the following:



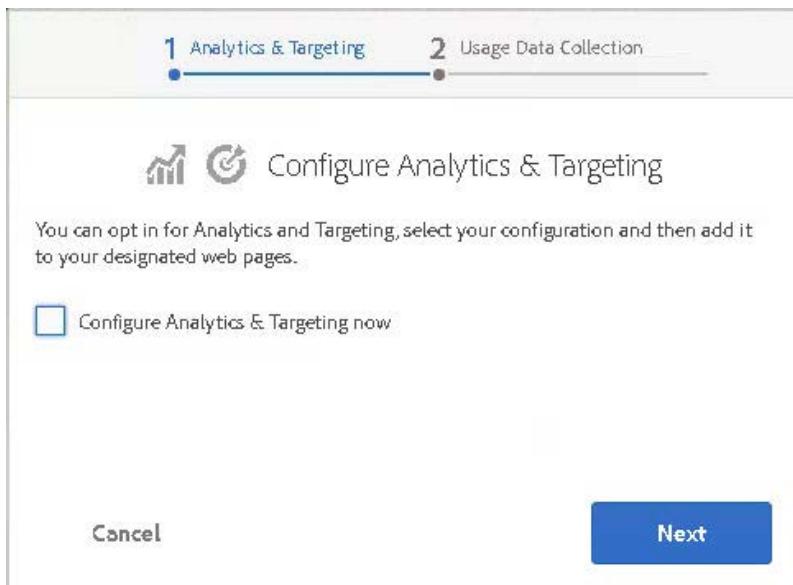
After Adobe Experience Manager starts, your default browser will open automatically, pointing to Adobe Experience Manager's start URL (where the port number is the one you defined on installation).

1. In the Sign In area that displays, enter the default administrator's credentials (**admin/admin**), and then click **Sign In**.

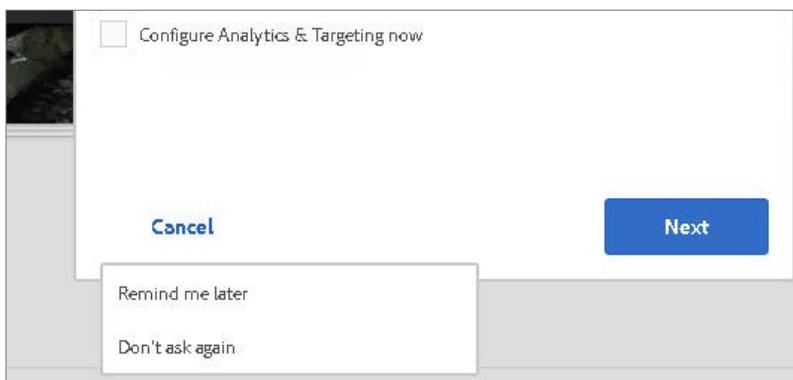


If this is the first time you are logging in, a wizard displays, asking if you want to configure Analytics & Targeting now.

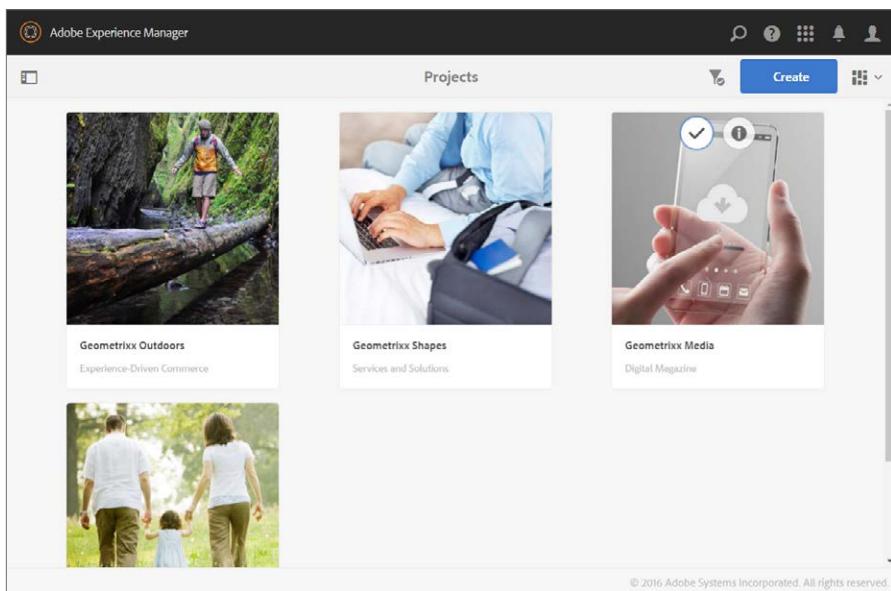
2. Click **Cancel**.



3. A hover menu opens, asking if you want to be reminded to complete the Configure Analytics & Target wizard later, or not ask again (which means it will never open again when you first log in). For this class, click **Don't ask again**.



4. The Welcome screen displays, with different consoles available for you.



## Using the Command Line to Start Adobe Experience Manager Author Instance

Prior to the installation, you may want to know which parameters are available to configure quickstart.

Enter the following command to display a complete list of optional parameters:

```
java -jar aem-author-4502.jar -h
```

The Adobe Experience Manager quickstart installer will show all available command-line options without starting the server. In addition, you need to tune the JVM used for running Adobe Experience Manager. Tuning the JVM is an important and delicate task and requires a more realistic environment in terms of resources (hardware, operating system, and so on) and workload (content, requests, and so on). For now, it will be enough to know that you can start your instance (Author or Publish) using the following parameters:

**-Xms --> assigns the initial heap size**

Default value	64 MB for a JVM running on 32-bit machines, or 83 MB for 64-bit machines
Recommended	Specific to physical memory available and expected traffic
Syntax	-Xms512m (sets the initial heap size to 512 MB)

**-Xmx --> assigns the maximum size the heap can grow**

Default value	64 MB for a JVM running on 32-bit machines, or 83 MB for 64-bit machines
Recommended	Specific to physical memory available and expected traffic, but should be equal or greater than the initial size. To run Adobe Experience Manager, it is recommended to allocate at least 1024 MB of heap size.
Syntax	-Xmx1024m (sets the maximum size for the heap. In the example, we are letting it grow to 1024 MB; however, in production, this should be higher because Adobe Experience Manager consumes a lot of resources).

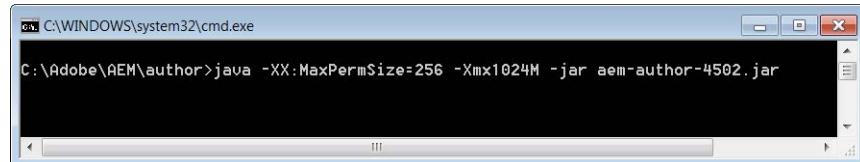
**-XX:MaxPermSize --> assigns the heap to hold reflective data of the VM (for example, Java objects)**

Default value	32 MB for a JVM running as a client, or 64 MB when running as a server.
Recommended	The 'PermSize' should be set to at least 128 MB for 'normal-sized' Web apps or 256 MB for larger Web apps with significant Java activity.
Syntax	-XX:MaxPermSize=128m (sets the initial perm gen size to 128 MB).



NOTE:-XX:MaxPermSize is no longer an option in JDK 1.8.

You can now install and start Adobe Experience Manager from the command line together with increasing the Java heap and perm gen size, which will improve performance. Refer to the following image for an example of the command line.



You can control the way Adobe Experience Manager is installed by defining properties via file name.



Perform Task 3: Start and install Adobe Experience Manager using command line, from the Lab Activity section.

### Using the Command Line to Start Adobe Experience Manager Publish Instance

Enter the following command to install the publish install:

```
java -jar aem-publish-4503.jar
```

# Lab Activity

---

## Overview

Unlike many other applications, you can install Adobe Experience Manager using a quickstart, self-extracting JAR file. When you double-click the JAR file for the first time, everything you need is automatically extracted and installed.

In some scenarios, you need to start the Adobe Experience Manager instance using the command line, where you provide the argument during the instance start-up.

To begin, you need to configure and install two servers:

1. **Author** on localhost port number 4502
2. **Publish** on localhost port number 4503

Content creators and developers use Author server to create and manage the content. Visitors access the website and interact with it on the Publish instance.



NOTE: The port numbers would differ in a VILT environment.

---

## Prerequisites

You need the following to complete the tasks in this module:

1. Adobe Experience Manager quickstart JAR file
2. license.properties file



NOTE: In VILT, the installation would have already been performed for you.

---

## Steps



### Task 1: Start an Adobe Experience Manager Author instance

1. Create a folder structure on your file system where you will store, install, and start Adobe Experience Manager. For example:
  - a. Windows: C:/adobe/AEM/author
  - b. MacOS X: /Applications/adobe/AEM/author or \*x: /opt/adobe/AEM/author
2. Copy the **aem-quickstart-6.2.0.jar** and **license.properties** files from the USB contents.

Share with ▾ New folder			
Name	Date modified	Type	Size
aem-quickstart-6.2.0.jar	5/6/2016 4:28 PM	Executable Jar File	487,006 KB
license.properties	2/15/2016 1:05 PM	PROPERTIES File	1 KB

3. Rename the **aem-quickstart-6.2.0.jar** file to **aem-author-4502.jar**:
  - a. aem = Application
  - b. author = Web Content Management (WCM) mode it will run in (in this case, Author)
  - c. 4502 = Port it will run in (any available port is acceptable).

Name	Date modified	Type	Size
aem-author-4502.jar	5/6/2016 4:28 PM	Executable Jar File	487,006 KB
license.properties	2/15/2016 1:05 PM	PROPERTIES File	1 KB

4. In a Windows or MacOS X environment, double-click the aem-author-4502.jar file. Installation will take approximately 5–7 minutes depending on your system's capabilities.



After Adobe Experience Manager Author instance has started successfully, the start-up screen will change to something similar to the following:



In addition, after Adobe Experience Manager starts, your default browser will automatically open to Adobe Experience Manager's start URL (where the port number is the one you defined on installation);. For example: <http://localhost:4502>



## Task 2: Start an Adobe Experience Manager Publish instance

1. Create a folder structure on your file system where you will store, install, and start the Adobe Experience Manager. For example:
  - a. Windows: C:/adobe/AEM/publish
  - b. MacOS X: /Applications/adobe/AEM/publish or \*x: /opt/adobe/AEM/publish
2. Copy the `aem-quickstart-6.2.0 JAR` and `license.properties` files from USB contents.

Name	Date modified	Type	Size
aem-quickstart-6.2.0.jar	5/6/2016 4:28 PM	Executable Jar File	487,006 KB
license.properties	2/15/2016 1:05 PM	PROPERTIES FILE	1 KB

3. Rename the `aem-quickstart-6.2.0.jar` file to `aem-author-4503.jar`
  - a. `aem` = Application
  - b. `publish` = WCM mode it will run in
  - c. `4503` = Port it will run in (any available port is acceptable)

Name	Date modified	Type	Size
aem-publish-4503.jar	5/6/2016 4:28 PM	Executable Jar File	487,006 KB
license.properties	2/15/2016 1:05 PM	PROPERTIES FILE	1 KB

4. Double-click the `aem-publish-4503.jar` file to start the Publish instance.



The screenshot shows a web browser window with the URL [localhost:4503/content/geometrixx-outdoors/en.html](http://localhost:4503/content/geometrixx-outdoors/en.html). The page features a top navigation bar with links for English, My Cart, Sign In or Register, and a search bar. Below the navigation is the Geometrixx Outdoors logo and a horizontal menu with categories: MEN'S, WOMEN'S, EQUIPMENT, ACTIVITIES, COMMUNITIES, SUPPORT, and BRAND.

The main content area has a large banner with the text "READY FOR ADVENTURE" and a subtext "Whatever summer holds, we have the gear for it." A "SHOP NOW" button with an orange arrow points to the right. To the right of the banner, a man is walking on a fallen log in a lush, green, mossy environment.

Below the banner, there are three sections: GEAR (with links to "Nunavut Fleece" and "Eulani Nomad"), ARTICLE (with a link to "SUMMER TRAVEL SURVIVAL GUIDE"), and SOCIAL (with posts from users "Luckyseven", "Jiggs Casey", and "Lady Delight").

After Adobe Experience Manager Publish instance has started successfully, the start-up screen will change to something similar to the website shown.



In addition, the Adobe Experience Manager login page opens from your default browser (where the port number is the one you defined on installation). For example: <http://localhost:4503>

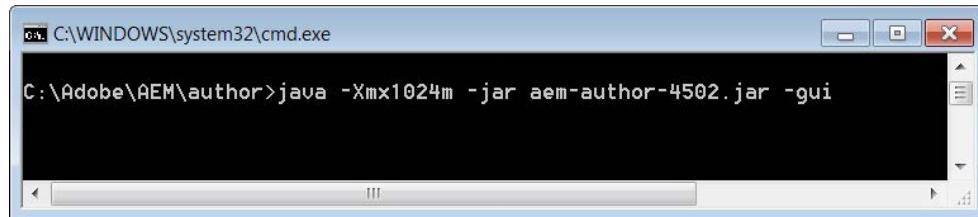
The following screen appears once the Publish instance is up and running. You have now successfully installed and started Adobe Experience Manager Author and Publish instances on localhost. To start Adobe Experience Manager in the future, double-click the renamed aem-quickstart-6.2.0.jar file. For example: aem-author-4502.jar

### Task 3: Start and install Adobe Experience Manager using command line

You already have an author instance and a publish instance running. Perform this task only when necessary or as an add-on exercise to try out beyond this class.

This is a powerful method because the user can provide additional performance-tuning parameters to the Java Virtual Machine (JVM). On Windows, MacOS X, or \*x, you can install or start Adobe Experience Manager from the command line, while increasing the Java heap size, which improves performance.

A typical command line start will have the following:



```
C:\WINDOWS\system32\cmd.exe
C:\Adobe\AEM\author>java -Xmx1024m -jar aem-author-4502.jar -gui
```

```
java -Xmx1024m -jar aem-author-4502.jar -v
```

In your command prompt, navigate to the **Adobe\AEM\author** directory, and use the following command to install Adobe Experience Manager, without installing the Geometrixx sites:

```
java -jar aem-author-p4502.jar -r author, nosamplecontent -gui
```

## Summary

You should now be able to:

- Install and run the Adobe Experience Manager Author instance
- Install and run the Adobe Experience Manager Publish instance