Build New Sites with Liferay DXP

Learning Objectives

- Understand how to add Pages and create Page Templates
- Learn what Site Templates are and how to use them
- Learn how to manage Sites and configure Site Settings

Tasks to Accomplish

- Add Pages to the default Site
- Create a Landing Page Template to be used across the platform
- Create a Site Template for Mondego's Bank Branches to rapidly add Sites to the platform
- Manage Site configurations
- Add a Child Site to the main Mondego Site

Exercise Prerequisites

- Unzipped module exercise files in the following folder structure:
  - Windows: `C:\liferay`
  - Unix Systems: `[user-home]/liferay`
- Liferay DXP 7.4 set up and running
  - If you have not started your instance yet, first, make sure you have installed Docker. Then, use the following commands to get and start the Liferay Docker Image:
    - `docker pull liferay/[product]:[version]`
    - `docker run -it -m 8g -p 8080:8080 liferay/[product]:[version]`
  - Once started, sign in using the default credentials:
    - Email: test@liferay.com
    - Password: `test`
  - Check out the Liferay Foundations: Introduction to Liferay DXP course if you have questions on starting a new instance of Liferay DXP
- The main Mondego Site created

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Add Pages to the Mondego Platform with Page Templates

Exercise Goals

- Create the Mondego Group Site
- Create a Master Page Template to use across the main Mondego Site
- Create a Content Page Template for Informational Pages
- Use the Account Content Page Template to create a page for Personal Banking Accounts
- Create a Widget Page Template for a Landing Page
- Use the Template to create a Landing Page for Mondego's Sites

Create the Mondego Group Main Site

1. **Sign in** to Liferay as an Administrator.
2. **Open** the *Global Menu* at the top right.
3. **Click** the *Control Panel* tab.
4. **Choose** *Sites* under *Sites*.
5. **Click** the *Add* button at the top right.
6. **Select** *Blank Site* as the Site Template.
7. **Type** `Mondego Group` as the *Name*.
8. **Click** the *Save* button.
9. This will take you to the *Site Settings* page.

Create a Master Page Template

1. **Open** the *Site Menu* at the top left.
2. **Go to** *`Design > Page Templates`* in the *Site Administration* panel.
3. **Click** the *Add* button at the top right.
4. **Type** `Header and Footer` as the *Name*.
5. **Click** the *Save* button.
6. **Go to** the *Fragments and Widgets* section.
    - Use the Plus sign on the right side to open *Fragments and Widgets* if it does not automatically open.
7. **Go to** *`Fragments and Widgets > Navigation Bars`*.
8. **Drop** a *Header Dark* at the top of the page above the *Drop Zone*.
9. **Go to** *`Fragments and Widgets > Footers`*.
10. **Drop** a *Footer Nav Dark* at the bottom of the page below the *Drop Zone*.
11. **Click** the *Footer Nav Dark* to open the *Browser*.
    - Alternatively, open the *Browser* by clicking the arrow icon below the plus icon.
12. **Click** the *02-copy* element to find the textbox on the page.
13. **Double Click** the text box to edit.
14. **Type** `2021 Mondego Group` as the new copyright.
15. **Click** the *Publish Master* button at the top right of the page.

Create a Content Page Template Using the New Master

1. **Click** the *Page Templates* tab at the top beside *Masters*.
2. **Click** the *New* button to create a new Collection.
3. **Type** `Informational Pages` as the *Name*.
4. **Click** *Save*.
5. **Click** the *Add* button at the right to add a Page Template to the Collection.
6. **Choose** *Content Page Template*.
7. **Select** *Header and Footer* as the Master Page.
8. **Type** `Accounts` as the *Name*.
9. **Click** the *Save* button.

Add Fragments to the Page Template

1. **Click** the *Fragments and Widgets* icon (plus sign) on the right side to open the menu.
2. **Go to** *`Fragments > Featured Content`*.
3. **Drop** a *Banner Center* onto the page.
4. **Go to** *`Fragments > Content Display`*.
5. **Drop** a *Content Display* onto the page below the *Banner Center*.
6. **Go to** *`Widgets > Collaboration`*.
7. **Drop** a *Form* widget onto the page below the *Content Display*.
8. **Click** the *Publish* button at the top right of the page.

Create a Page with the Accounts Page Template

1. **Open** the *Menu*.
2. **Go to** *`Site Builder > Pages`* in the *Site Administration* panel.
3. **Click** the *Add* button at the top right.
4. **Choose** *Public Page*.
    - You should see three available Collections: Informational Pages (which we just created), Basic Templates, and Global Templates.
5. **Select** the *Accounts* Content Page Template.
6. **Type** `Personal Banking` as the *Name*.
7. **Click** the *Add* button.
    - You should see the Fragments we added to the Account Page Template as well as the Header and Footer established in the Master Page Template.

Create a Global Landing Page Template

1. **Open** the *Site Menu*.
2. **Click** the *Site Selector* icon beside the current Site (Mondego Group).
    - The *Site Selector* allows you to choose which Site you want to access in your Liferay platform. Once selected, you will be able to access and edit the Site with the *Site Administration* panel.
3. **Click** the *My Sites* tab.
4. **Choose** the *Global* Site.
5. **Go to** *`Design > Page Templates`* in the *Site Administration* panel.
    - You'll see the default global Page Templates here already: Search, Wiki, and Blog.
6. **Click** the *Add* icon in the top right corner.
7. **Type** `Mondego Landing Page` as the *Name*.
8. **Type** `A landing page for the various Mondego sites.` as the *Description*.
9. **Click** the *Save* button.

Configure the Widget Page Template

1. **Click** on the new *Mondego Landing Page* template.
    - This will take you to the new template page.
2. **Click** the *Configure Page* (gear) icon at the top right.
3. **Choose** *2-2 Columns* from the grid of options under the *General* tab.
4. **Click** *Save*.
5. **Click** the *Back* (<) icon.

Add Language and Content Widgets to the Template

1. **Click** the *Add* icon in the top right corner of the page.
2. **Open** the *Widgets > Tools* section.
3. **Drop** a *Sign In* widget into the first column.
4. **Add** a *Language Selector* from the *Widgets > Tools* section to the right column.
5. **Go to** the *Widgets > Highlighted* section.
6. **Add** a *Web Content Display* to the first column below the *Sign In*.
7. **Add** an *Asset Publisher* from the *Widgets > Highlighted* section and place it in the right column beside the *Web Content Display*.
8. **Click** the *Back* (<) icon.
    - If your browser opened a new tab when you clicked on the *Mondego Landing Page* template, close the tab to get back to the *Pages* section of the *Global* Site.

Create a Page with the Landing Page Template

1. **Open** the *Menu*.
2. **Click** on the *Site Selector* in the *Site Administration* panel.
3. **Choose** the *Mondego Group* Site.
4. **Go to** *Site Builder > Pages* in the *Site Administration* panel.
5. **Click** the *Add* button next to *Public Pages*.
6. **Choose** *Add Page*.
7. **Go to** the *Global Templates* tab.
    - You should see the three default Page Templates plus the one we added above.
8. **Choose** the *Mondego Landing Page*.
9. **Type** `Home` for the *Name*.
10. **Click** *Add*.
    - When the configuration page loads, note that the *Inherit Changes* slider is set to *YES*. We want to keep this for now so that any changes we make to this Page Template in the future change this Page, too.
11. **Click** the *Save* button.
12. **Click** *Home* in the *Site Administration* panel.
13. **Click** *Home* in the navigation menu.

Update the Master Page Template for the Landing Page

1. **Click** the *Configure Page* (gear) icon.
2. **Click** the *Look and Feel* tab.
3. **Select** *Change Master* under the *Master* section.
4. **Choose** *Header and Footer* as the new Master.
5. **Click** the *Done* button.
6. **Click** the *Save* button.
7. **Click** the *Back* (<) icon.
    - The *Home* page should now have the same header and footer as the *Personal Banking* page.

Bonus Exercises:

1. Add another Content Page Template called Credit Cards to the Mondego Group Site. Pick two Fragments and one Widget to use on the page. Create at least one new page on the Mondego Group Site using the new template. View the new page in the Navigation Menu.
2. Create another Widget Page Template on the Global Site to use for Financial Advice. Use a Web Content Display widget, a Blogs widget, and a Message Boards widget. Choose whichever layout you prefer.

Add Sites to the Mondego Platform

Exercise Goals

- Create a Site Template for Mondego Regional Office locations
- Use the template to create Sites for some of Mondego's regional banks

Create a Site Template for Mondego Regional Offices

1. **Open** the *Global Menu*.
2. **Go to** *`Control Panel > Sites > Site Templates`* in the *Menu*.
3. **Click** the *Add* icon near the top right.
4. **Type** `Regional Bank Office Site` as the *Name*.
5. **Type** `A site template for Mondego's regional bank offices` as the *Description*.
6. **Click** *Save*.
7. **Click** the *Regional Bank Office Site*.
    - This will open up our Site Template in a new tab.
8. **Go to** *`Site Builder > Pages`* in the *Site Administration* panel.
9. **Click** the *Options* icon next to the default *Home* Page.
10. **Choose** *Delete*.
11. **Click** *OK* in the pop-up asking if you are sure you want to delete this.
12. **Click** the *New* button in the center of the page.
13. **Choose** *Private Page*.
14. **Click** the *Global Templates* tab.
15. **Choose** *Mondego Landing Page*.
16. **Type** `Home` as the *Name*.
17. **Click** *Add*.
    - When the configuration page loads, make sure the *Inherit Changes* slider is set to *YES*.
18. **Click** the *Save* button at the bottom of the page.
19. **Click** the *Back* (<) icon.

Add a Personal Banking Page to the Site Template

1. **Click** the *Add* icon near the top right.
2. **Choose** *Add Child Page of Home* in the drop-down.
3. **Choose** *Add Site Template Page*.
4. **Choose** *Blank* from the *Basic Templates* to add a new Content Page.
5. **Type** `Personal` as the *Name*.
6. **Click** *Add*.
    - For now, we will leave the Content Page blank.
7. **Click** the *Publish* button at the top right.

Add Child Pages for Checking, Savings, and Mobile Banking

1. **Click** the *Add* icon to the right of the *Personal* Page we just created.
2. **Choose** *Add Page*.
3. **Choose** the *Blank* Content Page.
4. **Type** `Checking` as the *Name*.
5. **Click** *Add*.
6. **Click** the *Publish* button at the top right.
7. **Click** the *Add* icon to the right of the *Personal* Page.
8. **Choose** *Add Page*.
9. **Choose** the *Blank* Content Page.
10. **Type** `Savings` as the *Name*.
11. **Click** *Add*.
12. **Click** the *Publish* button at the top right.
13. **Click** the *Add* icon to the right of the *Personal* Page.
14. **Choose** *Add Page*.
15. **Choose** the *Blank* Content Page.
16. **Type** `Online and Mobile Banking` as the *Name*.
17. **Click** *Add*.
18. **Click** the *Publish* button at the top right.
    - To view the newly created Child Pages, click the Arrow icon to the right of the Personal Page.

Finish Creating the Page Structure for the Site Template

1. **Click** the *Add* icon at the top right.
2. **Choose** *Add Site Template Page*.
3. **Choose** *Blank* Content Page.
4. **Type** `Business` as the *Name*.
5. **Click** *Add*.
6. **Click** the *Publish* button at the top right of the page.
7. **Click** the *Add* icon at the top right.
8. **Choose** *Add Site Template Page*.
9. **Choose** *Blank* Content Page.
10. **Type** `The Mondego Story` as the *Name*.
11. **Click** *Add*.
12. **Click** the *Publish* button at the top right of the page.
13. **Click** the *Add* icon at the top right.
14. **Choose** *Add Site Template Page*.
15. **Choose** *Widget Page*.
16. **Type** `Contact Us` as the *Name*.
17. **Click** *Add*.
18. **Click** the *Save* button at the bottom of the page.
19. **Click** the *Back* (<) icon.

Create a New Site Using the New Site Template

1. **Go to** *`Control Panel > Sites > Sites`* in the *Global Menu*.
2. **Click** the *Options* icon next to *Mondego Group*.
3. **Choose** *Add Child Site*.
4. **Choose** *Regional Bank Office Site*.
5. **Type** `Mondego North America` as the *Name*.
   - Leave the checkbox unchecked.
6. **Click** the *Save* button at the bottom.
7. **Click** on *`Site Builder > Pages`* in the *Site Administration* panel for the *Mondego North America* Site.
   - You'll see that the Pages we created in the template have been generated for this Site.

Create Two More Regional Bank Office Sites with the Site Template

1. **Go to** *`Control Panel > Sites > Sites`* in the *Global Menu*.
2. **Click** the *Options* icon next to *Mondego Group*.
3. **Choose** *Add Child Site*.
4. **Click** *Regional Bank Office Site* for the Site template.
5. **Type** `Mondego UK` as the *Name*.
6. **Click** the *Save* button.
7. **Go to** *`Control Panel > Sites > Sites`* in the *Global Menu*.
8. **Click** the *Options* icon next to *Mondego Group*.
9. **Choose** *Add Child Site*.
10. **Click** *Regional Bank Office Site* for the Site template.
11. **Type** `Mondego Japan` as the *Name*.
12. **Click** the *Save* button.
13. **Go to** *`Control Panel > Sites > Sites`* in the *Global Menu*.
14. **Click** the *Mondego Group* Site to see the Child Sites we created above.

Bonus Exercises

1. Create a Site Template for Mondego's Business Banking sites. The template should have at least three Content Pages that include at least one fragment or widget on each.
2. Add Mondego Regional Office Sites for Mondego locations in Chile and Germany. Make sure they are created as Child Sites of the main Mondego Site.
3. Add a custom Content Page to one of the new Mondego Regional Office Sites created from the Site Template. Navigate to the new Site and look at the Pages you added within the Site itself.

Manage Site Configuration

Exercise Goals

- Create a Private Site on the Mondego platform called Mondego Matters to serve as an employee intranet
- Create a Restricted Site for Mondego Publications
- Manage Site membership and configuration in the new Sites
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Add Private and Public Pages to the Mondego Publications Site

Add the Mondego Matters Employee Intranet

1. **Go to** *`Control Panel > Sites > Sites`* in the *Global Menu*.
2. **Click** the *Add* icon.
3. **Choose** *Blank Site*.
4. **Type** `Mondego Matters`.
5. **Click** the *Save* button.
6. **Open** *Site Configuration* under *`Site Settings > Platform`*.
7. **Type** `Mondego's main employee intranet site.` as the *Description*.
8. **Open** the *Membership Type* drop-down under the *Membership Options* heading.
9. **Choose** *Private*.
10. **Click** the *Save* button at the bottom of the page.

Add the Mondego Publications Site

1. **Go to** *`Control Panel > Sites > Sites`* in the *Global Menu*.
2. **Click** the *Add* icon.
3. **Choose** *Blank Site*.
4. **Type** `Mondego Publications`.
5. **Click** the *Save* button.
6. **Open** *Site Configuration* under *`Site Settings > Platform`*.
7. **Type** `Mondego's blog, video, and financial advice site.` as the *Description*.
8. **Click** *Change* by the *Parent Site* heading.
9. **Select** *Mondego Group* as the Parent Site.
10. **Enable** *Limit membership to members of the parent site*.
11. **Open** the *Membership Type* drop-down under the *Membership Options* heading.
12. **Choose** *Restricted*.
13. **Click** the *Save* button at the bottom of the page.

Add a Public Blog Page to the Mondego Publications Site

1. **Open** the *Site Menu*.
2. **Go to** *`Site Builder > Pages`*.
3. **Click** the *New* button in the middle of the page.
4. **Choose** *Public Page*.
5. **Add** a *Blank* Content Page.
6. **Type** `Blog` as the *Name*.
7. **Click** *Add*.
8. **Open** the *Fragments and Widgets* menu.
9. **Go to** *`Fragments > Featured Content`*.
10. **Drop** a *Highlights Center* fragment onto the page.
11. **Go to** *`Widgets > Collaboration`*.
12. **Drop** a *Blogs* Widget onto the page.
13. **Click** the *Publish* button at the top right of the page.

Add Private Pages on the Mondego Publications Site

1. **Click** *Pages* link at the top left to go back to the main Pages view.
2. **Click** the *Add* button at the top right.
3. **Choose** *Private Page*.
4. **Add** a *Blank* Content Page.
5. **Type** `Expert Advice` as the *Name*.
6. **Click** *Add*.
7. **Click** *Publish* at the top right.
8. **Click** the *Add* icon next to *Private Pages*.
9. **Choose** *Add Page*.
10. **Add** a *Blank* Content Page.
11. **Type** `Mondego Happenings` as the *Name*.
12. **Click** *Add*.
13. **Click** *Publish* at the top right.

Bonus Exercise

1. Add pages to the Mondego Matters site. Use two Private Pages and two Public Pages. Sign out of the Administrator account and view the Site as a guest. (You may need to enter the URL to see the specific Site. Generally, this will be `localhost:8080/web/[site-name]`.)