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From straightforward to sophisticated: UI customization for IBM WebSphere Portal and WCM



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Abstract

- Delivering a great digital experience for your customers or employees depends on having a polished UI that meets your organization's unique needs.
- WebSphere Portal & WCM come with a full spectrum of UI customization options, from straightforward to sophisticated.
- In this session we will give you a flavour of that full range, starting with powerful customization options that can be applied more simply than you would imagine.
- At the other end of the scale, we'll explore the capabilities available if you need go much further in developing a custom UI, taking as an example a custom page-editing capability.
- We will look at the extension points and APIs provided by the product, the opportunities they present and some of the different possible design approaches to our page-editing case study.

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You

• Theme customization is something I know my project has to do but:

- I don't really know how to go beyond the basics
- I know my client wants more than basic styling changes
- I feel constrained by theme customization

• In this session you will:

- Learn about the tools Portal v8 offers for theme customization and extension
- Understand the circumstances under which you might need to extend the out-of-thebox Portal v8 theme
- Review the APIs provided by Portal v8 to manage the page layout & contents
- See some solution examples that you can use as inspiration

• But this is not:

- An HTML or Java development lesson
- Theme Customization 101

Agenda

- Introduction
- What's the scope of what we're talking about
- Straightforward stuff
 - View and edit modes
 - Easy theme customizations
 - The tools Portal gives you

Sophisticated stuff

- Client-side refresh of page changes
- Enforcing a strict editing workflow
- "Preview" mode for portlets on edited page
- Editing portlet settings in constrained environment
- Q&A

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Requirements from recent projects

Everyone wants a custom theme

- Apply corporate branding
- Remove IBM "look"
- Deliver custom UI features



Customers ask for all sorts of things : easier stuff we've met

- Apply branding
- Use Jquery instead of Dojo
- Use their choice of responsive framework
- Optimize download size



Customers ask for all sorts of things : harder stuff we've met

- Custom page editing experience (e.g. strict editing workflow)
- Untemplated layout
- Client-side refresh of page changes
- "Preview" mode for portlets on edited page
- Editing portlet settings in constrained environment
- Mobile editing experience



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Straightforward stuff

Portal 8.0 theme

• One theme – called Theme 8.0

- Same theme modularization architecture from Portal 7.0.0.2
- Replaces all previously shipped out of the box themes

Key features

- Modularization
- Server Side Aggregation support
- Portlet and iWidget support
- Static html templates: theme, skin, layout with WebDAV editing
- Dynamic-content provides means to inject server side logic into static templates without inserting code
- Dojo 1.7

Portal page types

Dynamic Pages

- "Traditional" pre-v7 portal pages, constructed of nested row and column containers added with the Manage Pages portlet
- Portlets are added and removed in the same way

Static Pages

- Page layout completely described with HTML / CSS / images uploaded as a ZIP file
- Portlets embedded where desired by pseudo-CSS classes

"Page Builder" Style Static Pages

- Page layout and portlet containers determined by a layout template
- Layout templates are HTML files, typically in the theme
- Portlets are added and removed using theme's page editing capabilities (or custom functionality)
- Layout template markup is "cached" in page until new layout selected or refresh forced by administrative action

Static templates

- Static templates are stored in WebDAV
- Themes
 - theme.html in /fs-type1/themes/<theme-name>/
- Skins
 - skin.html in /fs-type1/themes/Portal8.0/skins/<skin-name>/
- Layouts
 - layout.html in /fs-type1/lthemes/Portal8.0/layout-templates/<layoutname>/
- When editing using OOB templates, remember they are localized!
 - You must edit the localized template to see changes
 - Localized templates example:
 - /fs-type1/themes/Portal8.0/nls/theme_en.html

Dynamic content spots

Dynamic spots

- Microformat defined in theme.html and other static files
-
- Parsed at runtime, href resolved and response streamed out
- Config in WP_DynamicContentSpotMappings resource environment provider

80theme_primaryNav

-mvc:res:/wps/defaultTheme80/themes/html/dynamicSpots/navigation.js

p?rootClass=wpthemePrimaryNav

%2520wpthemeLeft&startLevel=1,smartphone@,tablet@

80theme_mobileNav

-mvc:smartphone/tablet@res:/wps/defaultTheme80/themes/html/dynamicS
pots/navigation.jsp?rootClass=wpthemeMobileNav
%2520wpthemeLeft&startLevel=1&levelsDisplayed=2

Theme.html

```
Published Site
                                                                 Edit Mode
Home
     Administration
              Applications
                      Search Center
                               Tag Center
                                                                         Viewing published content
                                                                                  TEM
        Getting Started
                               CTF Legacy Test Page
                                                                        Log Out
Welcome
                    CTF Test Page
                                               Test
                                                                                   Q
                         <div class="wpthemeBanner">
                              <div class="wpthemeBannerInner">
                Welco
                                   <div class="wpthemeInner">
                                        <a rel="dynamic-content" href="dyn-cs:id:80theme_search"></a></a>
                 ME
                                       <a rel="dynamic-content" href="dyn-cs:id:80theme_commonActions"></a></a>
                                       <a rel="dynamic-content" href="dyn-cs:id:80theme_mobileNav"></a></a>
                                        <div class="wpthemeClear"></div>
                                   </div>
                              </div>
                         </div><!--end main banner-->
                         <div class="wpthemeBanner wpthemeBannerPrimaryNavigation">
                              <div class="wpthemeBannerInner">
                                   <div class="wpthemeInner">
                                       <a rel="dynamic-content" href="dyn-cs:id:80theme_primaryNav"></a>
                                        <div class="wpthemeClear"></div>
                                   </div>
                              </div>
                         </div><!--end primary nay banner-->
```

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Skin.html



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Layout.html system/layouts.json – available layout templates Portal8.0 **V** contributions CSS Revert Save More -Layout images is Top column 2 column Top column 3 column 1 column **V** layout-templates unequal center 1Column 1Row2ColumnUnequal 1Row3ColumnEqual 2ColumnEqual 2 column equal 2 column right 2 column left 2ColumnLeft 2ColumnRight 2Row 3ColumnCenter 3 column center 3 column equal 2 row 3ColumnEqual TopColumn2ColumnUnequal TopColumn3ColumnCenter <div class="wptheme2Col wpthemeUnequal wptheme2ColLeft"> <div class="component-container wpthemeCol wpthemePrimaryContainer ibmDndColumn wpthemeLeft"</pre> wpthemeCol8of12 wpthemeWide" name="ibmMainContainer"></div>

<div class="component-container wpthemeCol wpthemeSecondaryContainer ibmDndColumn wpthemeLeft
wpthemeCol4of12 wpthemeNarrow" name="right"></div</pre>

</div>

Place framework files

Framework CSS and JS •In this example I'm using SCSS to manage stylesheets



My custom files •Custom layout templates •Custom styles •Fonts

Define theme contributions

ł

r 📄 co	ontributions
2	contextmenu.json
2	ctc.json
2	dojo17.json
2	dsTheme.json
2	foundation.json
2	oneui30.json
Z	theme.json

```
"modules":[{
   "id":"dsTheme",
   "prereqs":[{
        "id":"foundation"
   }],
    "contributions":[{
        "type":"head",
        "sub-contributions":[{
            "type":"css",
            "uris":[{
                "value":"/dsTheme80/stylesheets/theme-base.css"
            }]
       },{
            "type":"css",
            "uris":[{
                "value":"/dsTheme80/stylesheets/offcanvas.css"
            }]
       },{
            "type":"css",
            "uris":[{
                "value":"/dsTheme80/stylesheets/layout-base.css"
            }]
        }]
   }]
```

3 Neat things with theme contributions

From contributions/CTC.json

```
},{
},{
                                                                  "type":"css",
    "type":"css",
                                                                  "uris":[{
    "uris":[{
                                                                      "value":"/CTC/css/theme-mid-screen.css"
        "value":"/CTC/css/theme-mid-screen.css",
                                                                  },{
        "deviceClass" : "smartphone"
                                                                      "value":"/CTC/css/theme-mid-screenRTL.css"
   }]
                                                                      "type":"rtl"
1.1
                                                                  }]
                                                              15
"contributions":[{
    "type":"config",
    "sub-contributions":[{
        "type":"js",
        "uris":[{ "value":"/CTC/js/nls/theme-contributions.js" },
                 { "value":"/CTC/js/nls/theme-contributions_ar.js", "lang":"ar"},
                 { "value":"/CTC/js/nls/theme-contributions_ca.js", "lang":"ca"},
                 { "value":"/CTC/js/nls/theme-contributions_cs.js", "lang":"cs"},
```

Define a theme profile

profiles
 profile_admin.json
 profile_ctc_deferred.json
 profile_deferred.json
 profile_ds_deferred 2.json
 profile_ds_deferred.json
 profile_full.json
 profile_lightweight.json
 profile_wcmauthoring.json
 profile_wcmhidden.json

```
"moduleIDs": [
   "foundation",
    "dsTheme",
    "dsTheme_content"
],
"deferredModuleIDs": [
    "wp_theme_widget".
    "wp_toolbar",
    "wp_project_menu_edit",
    "wp_preview_menu".
    "wp_analytics",
    "wp_content_mapping_picker",
    "wp_pagebuilder_controls",
    "wp_pagebuilder_dnd",
    "mm_new_page_dialog",
    "mm_builder_wiring",
    "mm_move_page",
    "mm_delete_page",
    "mm_delete_control",
    "mm_page_sharing_permission",
    "wcm_inplaceEdit",
    "wp_template_select_dialog",
    "wp_content_targeting_cam",
   "ctc_theme_contributions"
],
"titles": [
        "value":"DS Theme Content",
        "lang":"en"
```

Define any dynamic content spots

Dynamic spots

- Microformat defined in theme.html and other static files
-
- Parsed at runtime, href resolved and response streamed out
- Config in WP_DynamicContentSpotMappings resource environment provider

dstheme_primaryNav

- -mvc:res:/wps/defaultTheme80/themes/html/dynamicSpots/navigation.js
 - p?rootClass=dsthemePrimaryNav
 - %2520wpthemeLeft&startLevel=1,smartphone@,tablet@

dstheme_mobileNav

-mvc:smartphone/tablet@res:/wps/defaultTheme80/themes/html/dynamicS pots/navigation.jsp?rootClass=dsthemeMobileNav %2520wpthemeLeft&startLevel=1&levelsDisplayed=2

Build theme.html

<!DOCTYPE html>

```
<!-- paulirish.com/2008/conditional-stylesheets-vs-css-hacks-answer-neither/ -->
<!--[if IE 8]> <html class="no-js lt-ie9" lang="en"> <![endif]-->
<!--[if gt IE 8]><!--> <html class="no-js" lang="en"> <!--<![endif]-->
<head>
        <meta charset="utf-8" />
        <!-- Set the viewport width to device width for mobile -->
        <meta name="viewport" content="width=device-width" />
```

```
<link rel="dynamic-content" href="co:head?optimized=false">
<link rel="dynamic-content" href="dyn-cs:id:80theme_head">
```

</head>

<body id="page" class="off-canvas hide-extras lotusui30dojo tundra locale_en linen">

Build layout templates



```
-div class="contentClass">>>/divs
```

Register layout templates



```
{
    'label':'change_layout_4row',
    'url':ibmCfg.themeConfig.themeWebDAVBaseURI+'dsTheme80/layout-templates/4row/',
    'id':'4row',
    'thumbnail':ibmCfg.themeConfig.themeRootURI+'/dsTheme80/layout-templates/4row/icon.gif',
    'help':''
},
```

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Sophisticated stuff

Portal Model SPIs

- There are many model SPIs giving read access to various parts of the portal configuration, such as:
 - (Admin)PortletModel portlets and their configuration
 - **ContentModel** the page hierarchy and page data (title, description, etc.)
 - ContentMetaDataModel metadata for nodes of the ContentModel
 - LanguageList supported languages within WebSphere Portal
 - LayoutModel the layout of a page
 - MarkupList supported markup languages
 - NavigationModel the navigation topology visible to a specific user
 - NavigationSelectionModel the currently selected navigation nodes
 - SkinList the list of skins
 - ThemeList the list of themes

Model SPI usage examples



Portal Model Controller SPIs

- To make updates we use controller SPIs associated with the models, mainly:
 - ContentModelController
 - LayoutModelController
 - PortletModelController
- The basic steps of working with a controller are:
 - 1) Obtain the controller from a factory
 - 2) Obtain a modifiable instance of an artefact from that controller
 - 3) Apply your changes to that instance
 - 4) Commit the controller to save the changes
 - 5) Dispose the controller, if necessary

Model Controller usage flow





Portal SPIs hints and tips

- Controller factories are usually themselves obtained from a "home" interface, looked up via JNDI
 - These "homes" can be cached for the lifetime of the JVM to save expensive JNDI lookups
- Some (but not all) controllers have a "dispose()" method that frees up resources they have reserved
 - Where present, these methods should always be called once a controller is no longer needed for a given request (e.g. in a "finally" block)
- May need to "re-find" newly created resources (e.g. pages, portlet instances) before serializing their object IDs to text

Page rendering via Portal URLs

Portal will provide the markup for the "portlet area" of a page (i.e. without the markup generated by the theme) in response to a URL of the form:

/wps/myportal?uri=lm:oid:<page-id>

• Or the markup for a single portlet instance on page in answer to:

/wps/myportal?uri=lm:oid:<portlet-instance-id>@oid:<page-id>

Page updates via Portal URLs

Portal provides a REST API for accessing and updating resources, using URLs such as:

/wps/mycontenthandler?uri=<model>:<resource-id>

where "model" is the appropriate model abbreviation, such as: *content model (cm), navigation model (nm), layout model (lm)* or *portlet model (pm)*

So, an example call to get the content (page) information for the content root would be:

/wps/mycontenthandler?uri=cm:oid:wps.content.root

Portal REST / ATOM feeds

- Scope is a subset of Java SPI
- ContentModel
 - obtain and modify the content topology and the properties of content nodes such as pages, labels and content URLs.
- NavigationModel
 - obtain the navigation topology only
- LayoutModel
 - obtain and modify the layout of a page
- PortletModel
 - obtain, create, update and delete portlets
- http://www-10.lotus.com/ldd/portalwiki.nsf/dx/Remote_Model_SPI_REST_service_wp8

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Solution example

Solution example

Creating a page customizer:

- Client-side refresh of page changes
- Enforcing a strict editing workflow
- "Preview" mode for portlets on edited page
- Editing portlet settings in constrained environment

Page customizer design considerations

- Editing page "in situ" vs from another page
- iframes vs "in page" rendering
- Portlets vs theme components
- Enabling editing of portlet settings
- Client-side vs server-side update operations

Three basic patterns



Edit page inline

Dedicated customizer page. Page preview in an iframe. Dedicated customizer page. Page preview inline.

Inline customizer



Edit page inline

Editing page "in situ"

- Put the current page into "edit mode"
- Theme components required to provide editing capabilities
- Approach used in the 8.0 out-of-the-box functionality
- Standard navigation components show that the user is still "on" the page
- Saving and full page refresh usually required to see changes

Editing using theme components

- Tied to the theme
- Less common and standardized programming model

Customizer page – preview in iframe



Dedicated customizer page. Page preview in an iframe.

- Editing page from a different page
 Typically portlet(s) on the customizer page do the editing
 Good when no WYSIWYG editing interface required (but not only then as we will see!)
 - Good control over editing workflow possible
 - Allows other portlets to be present during the editing process, even though not on the edited page
 - Standard navigation components show that user is on the customizer page, not the edited page

iframe use

- Allows separation of "preview" of edited page from other components e.g. portlet list
- Therefore only the iframe content will usually need to be refreshed on changes
- Edited page in iframe will need to handle e.g. drop events, so custom theme components will probably be needed
- Links in portlets on edited page can be active and will affect only the iframe (e.g. switching a portlet into edit mode)

Editing using portlets

- Well-known and standardized (JSR 286) programming model
 Can be deployed on pages along with other portlets using standard portal administration tools

Customizer page – preview inline

/customizer	

Dedicated customizer page.

Page preview inline.

Editing page from a different page

- Typically portlet(s) on the customizer page do the editing
- Good when no WYSIWYG editing interface required (but not only then as we will see!)
- Good control over editing workflow possible
- Allows other portlets to be present during the editing process, even though not on the edited page
- Standard navigation components show that user is on the customizer page, not the edited page

No iframe use

- No custom theme components are required when editing from another page functionality can all be under the control of portlets
- Rendered page or portlet instance markup can be requested from portal and embedded
- However, will usually need to save page changes before requesting
 Links in portlets on the edited page should not be live or will navigate to that page and away from customizer page (so need a different solution for editing portlet settings)

Editing using portlets

- Well-known and standardized (JSR 286) programming model
- Can be deployed on pages along with other portlets using standard portal administration tools

Enabling editing of portlet settings

Editing page "in situ"

- Can use standard links to edit settings, once page saved and portlets rendered
- Would need to change links (i.e. update the skin) to accommodate requirements such as maximised edit mode or a change to the navigation display

Editing page from a different page, preview in an iframe

- Can use standard links to edit settings, once page saved and iframe refreshed
- Link effects restricted to changing iframe content and constrained to size of iframe
- Can't accommodate requirements such as change to navigation display

Editing page from a different page, preview rendered "in page"

- Standard links can't be used or will lose context
- Can create new links to navigate as desired
 - e.g. to open the edited page with a particular portlet in edit mode and maximised and with a different theme navigation displayed
- Need a way to get back, placing some requirements on the portlet's edit mode

Client-side vs server-side update operations

Client-side updates

- Portal provides a REST API for page update operations
- REST API is a subset of the server-side SPI
- Potentially quite "chatty" in the number of requests and responses required

Server-side updates

- Very powerful server-side model SPI provided by portal
- Can reduce the number of requests from client-side code by providing coarse-grained operations (e.g. through the "serveResource" method of a portlet)

Demo page customizer solution

To show:

- Client-side refresh of page changes
- Enforcing a strict editing workflow
- "Preview" mode for portlets on edited page
- Editing portlet settings in constrained environment

We have selected the following design options:

- Edit the page from a different page
- In-page rendering of edited page (no iframes)
 - Rendered portlets are "masked" to be read-only
- Encapsulate functionality in portlets, not theme components
- Perform updates server-side
 - Page customizer portlet provides a coarse-grained "API" to the client-side code

Demo

- Client-side refresh of page changes
- Enforcing a strict editing workflow
- "Preview" mode for portlets on edited page
- Editing portlet settings in constrained environment

Layers of the demo page customizer



Adding a portlet to a page

Client-side JavaScript



Questions

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Reference slides

Adding a portlet to a page – calling serveResource()



Adding a portlet to a page – *updating the model server-side*

Client-side JavaScript



























Adding a portlet to a page – requesting portlet markup



Adding a portlet to a page – *inserting the markup*

Client-side JavaScript



Adding a portlet to a page – masking the portlet contents

Client-side JavaScript

