How-to Enable Evolution Templates and Components

Global Marketing Technology

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1 Document History

The following important changes have been made to this document:

Date	Version #	Description	Author	Approved By
12/11/2020	1.0	Draft	Mohammed Muneebuddin Tajuddin	
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2 Introduction

This document provides Instructions for markets to migrate codes to the new 2.0 Evolution components covering following high-level objectives:

Enable Evolution Components to a New Market: Core activities needs to be configured within the Design view for authors to be able to use the new 2.0 components.

Enable New Header and Footer to the Old Template Pages: The new designs are a new code base, which means pages that use the old layout will have a separate code base than the ones that use the new templates. A page created in old template will have a new header and footer, consistent with the Evolution-based pages. The new header and footer can be configured in old templated by editing the Global Properties.

Migration of Old Experience to New Experience: When creating the new pages, you will want to create the new look and feel for the site, but cannot simply make the updates on existing page just in case current page changes are needed while the redesign is happening. This section explains best practices to help keep the old pages live while creating new pages for the refresh, and how to easily cut over to the new pages when you are ready

Classic UI vs Touch UI:
This section highlights the key differences between Classic and Touch UI authoring experiences.

3 Enable Evolution Templates and Components

Step 1: Creation of Evolution Based Home Page

1) Create a Home page by selecting *Evolution Home Page Template* for a specific market for which the setup must be enabled. Evolution based templates can be identified by the template name with suffix 2.0. All the settings done at Homepage level will be inherited to its children pages. So, it is necessary to do the setup at the Parent level.
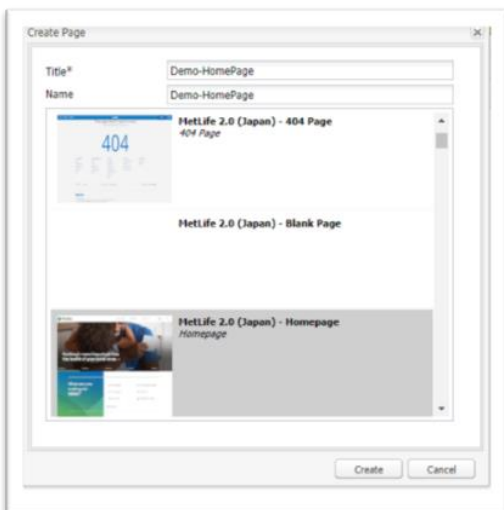
Note: Same steps can be followed to create any page inside home page based out of Evolution 2.0 template.
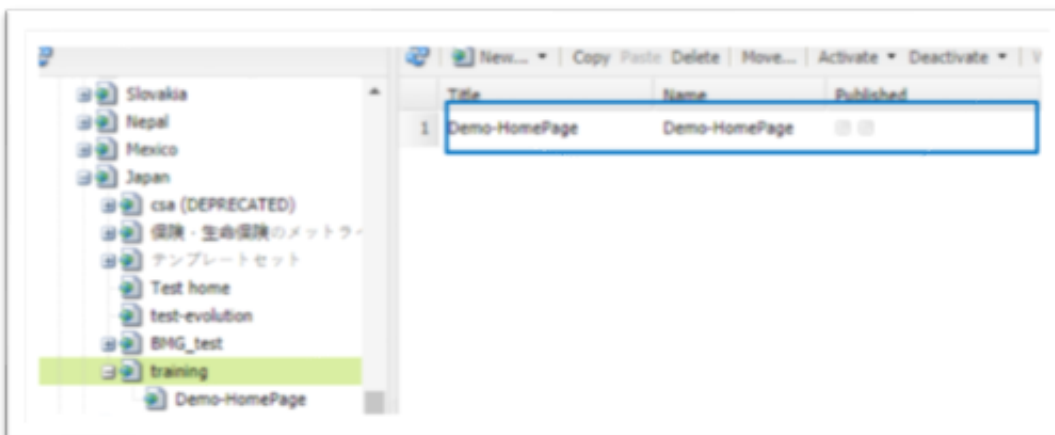
https://stage.authormetlife.com/siteadmin#/content/metlife/jp/training
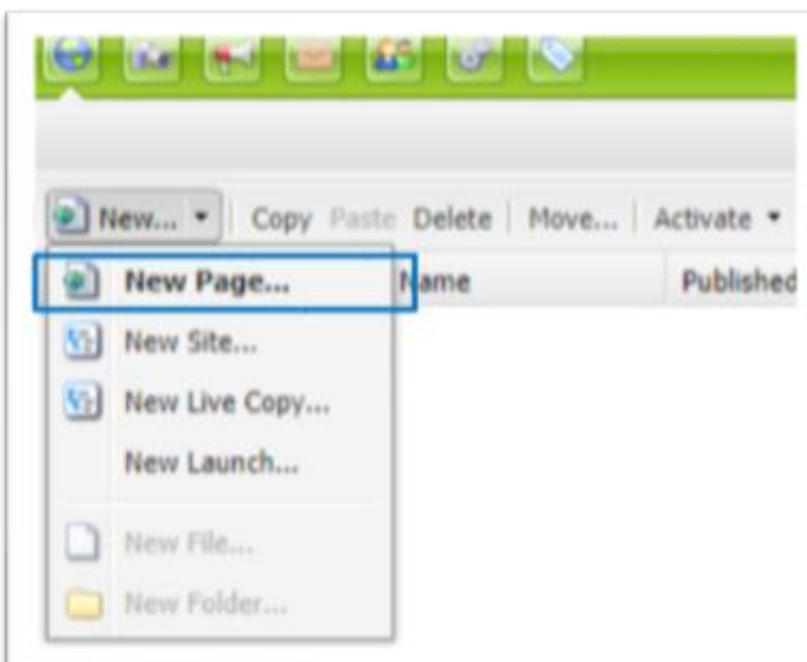
1. Create a new page:
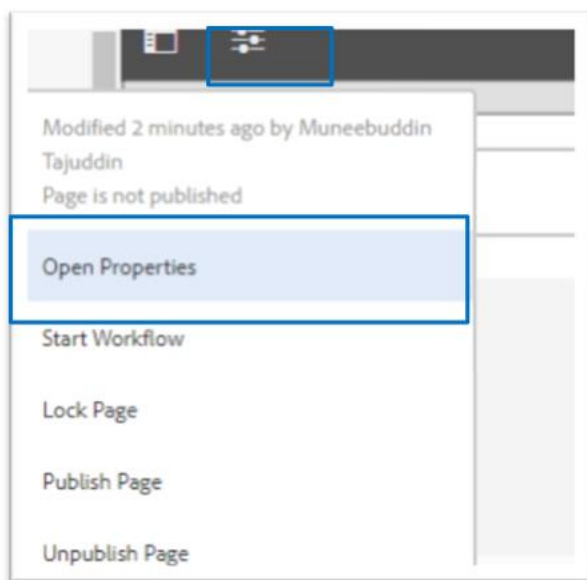
2.Give a *Title* and a *Name* to the new page:

3. A new Evolution-based home page has been created:
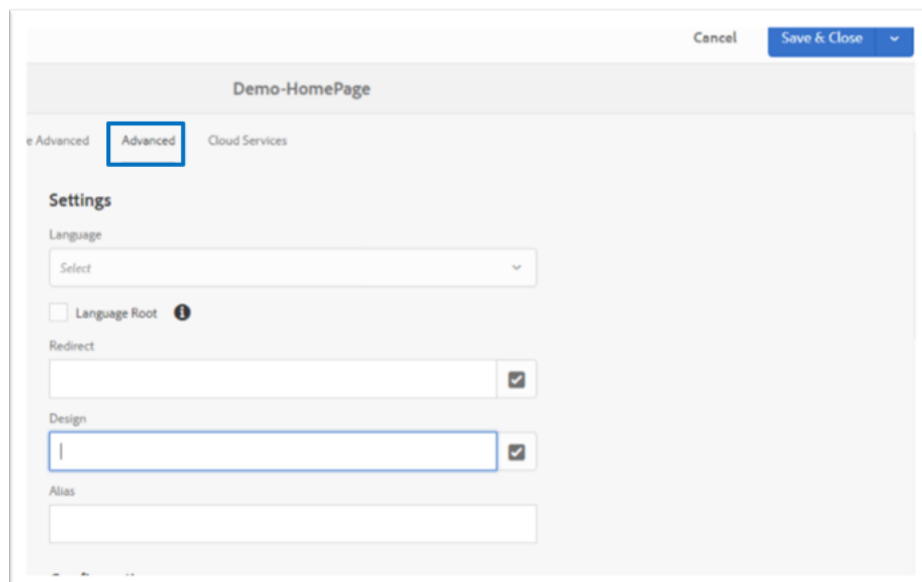
Step 2: Configure Design path

1. Open the page and click
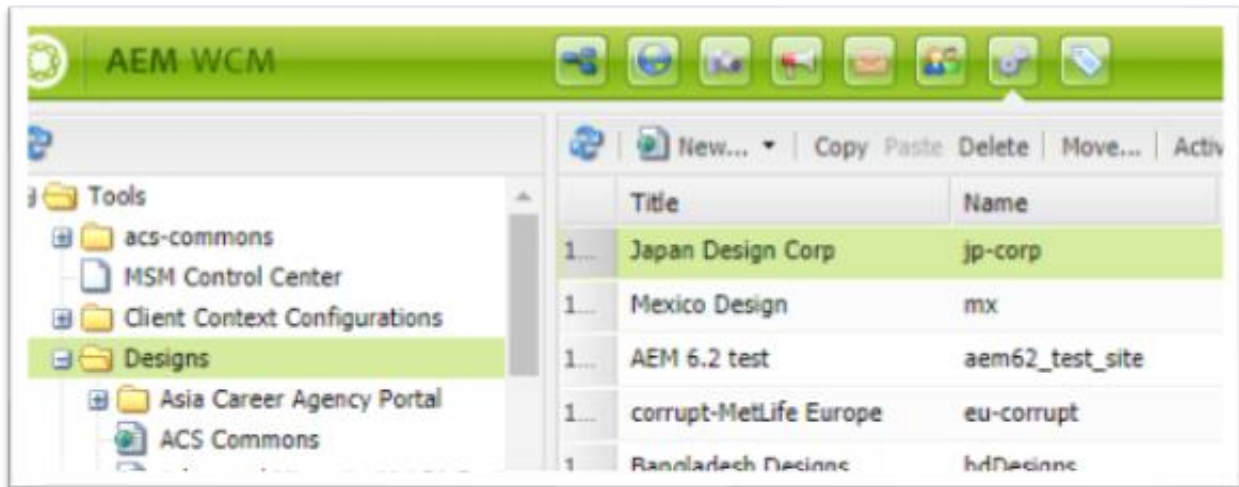2. Select Open Properties.

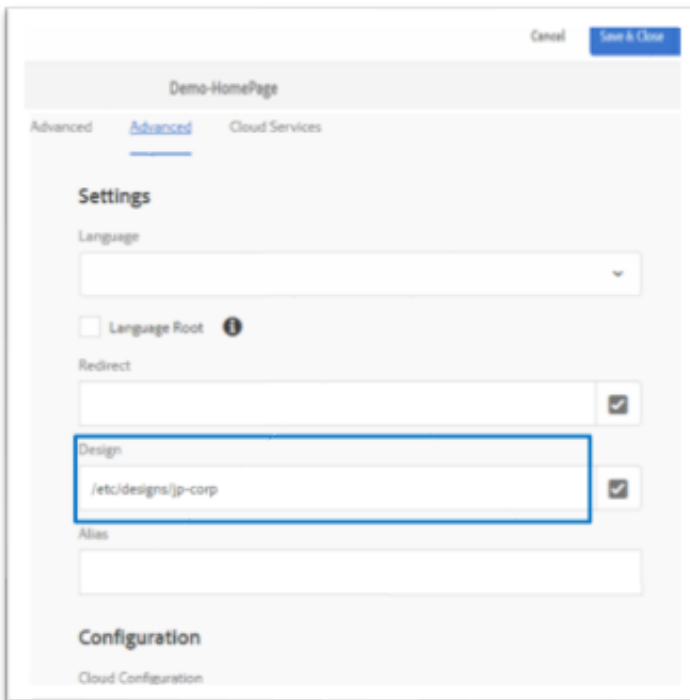3. Click on the '*Advanced Tab*' to provide the *Design* path.

4. The Design path can be navigated by clicking this link:
    https://stage.authormetlife.com/miscadmin#/etc/designs

5. Select the Design based on the market. For example: jp-corp

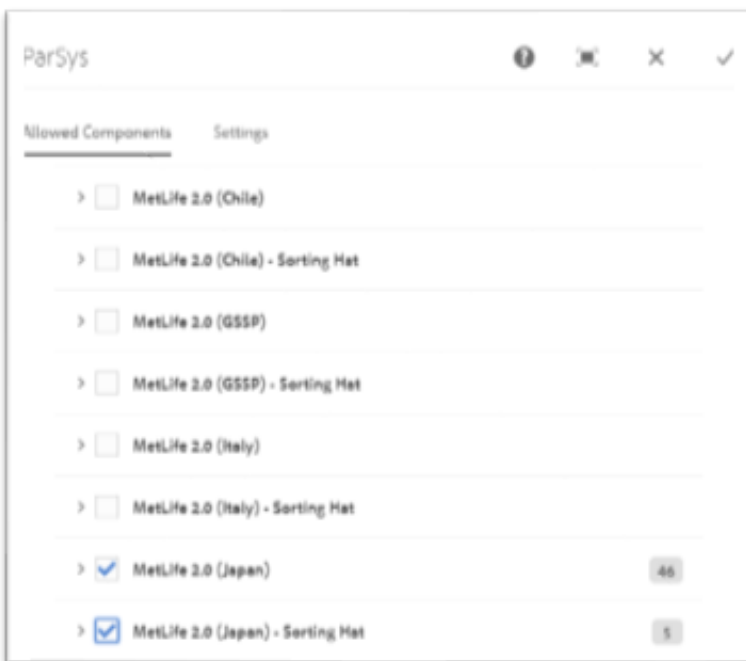6. Enter the design path /etc/designs/jp-corp here and click Save.

Step 3: Enablement of Evolution Components

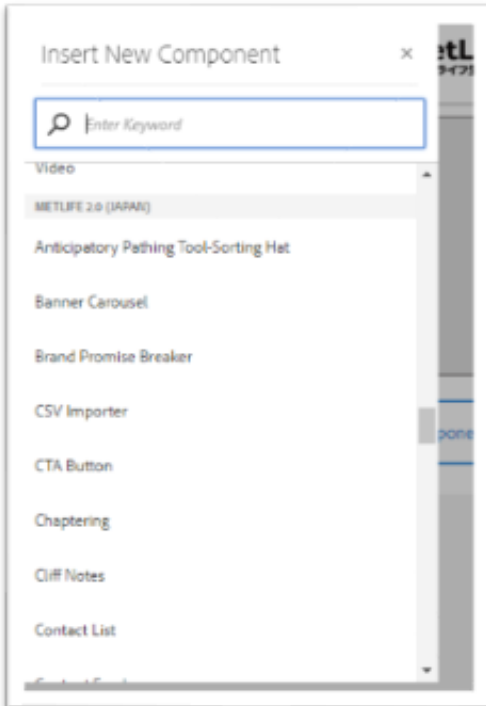1. In the Design mode of the page click the Parent button and then click configure.

2. From the list of available components select the Evolution component (MetLife 2.0 based on the market) and click on ✓ symbol to complete the selection:
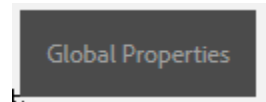
3. In the Edit mode of the page click ⊞ to insert component.

You will notice the Evolution based components being enabled.
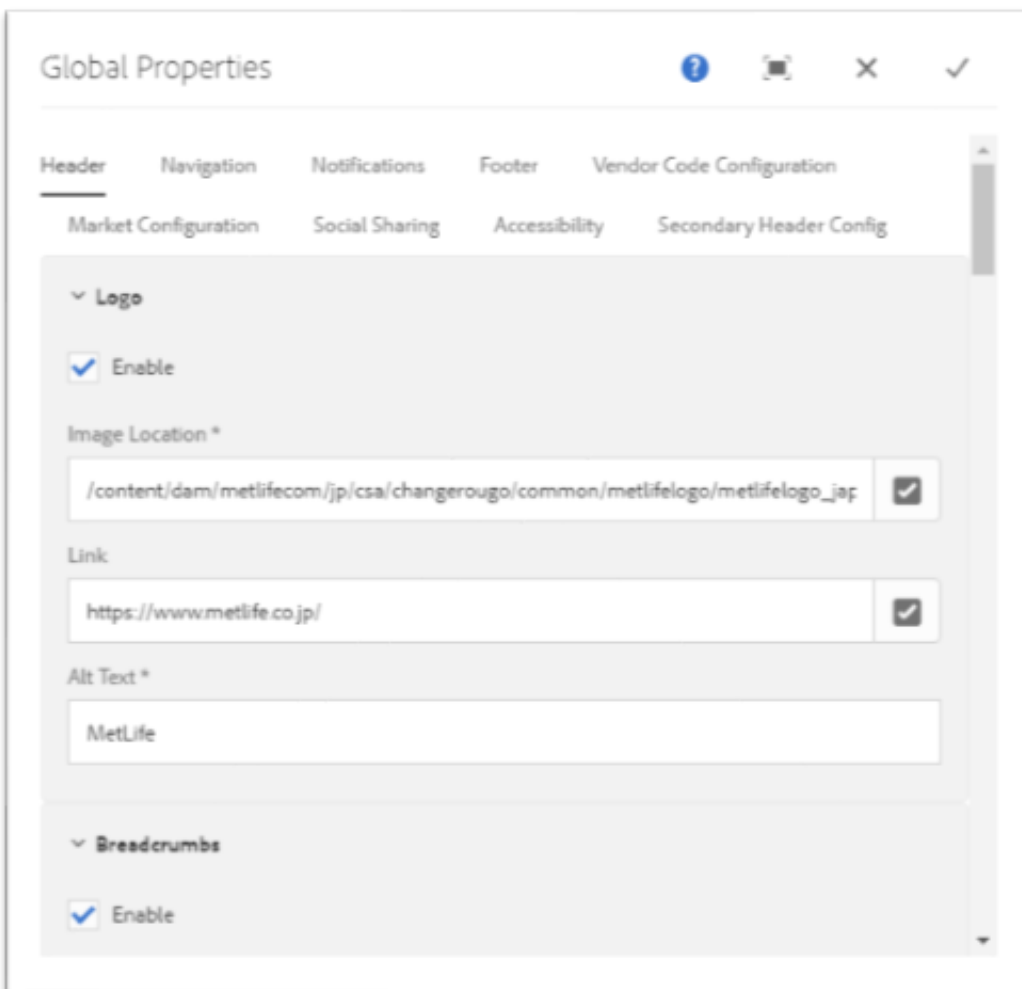
Step 4: Configure Global Properties

1 . In the *Design Mode* of the page , click *Global Properties* which can be found at the right bottom of the page.

Global Properties

2. Author the required tabs: *Header, Footer*, and *Navigation*. To know what exact details to be given we can refer to the *Global Properties* of the home page created in old template.

Based on the new design, the input in this dialog can be changed.

Step 5: Activate New Design

Once the Global properties are updated the changes can be seen on author environment. To see these changes on the preview environment, access the design path (/etc/designs/) and select the design and click '*Activate(preview)*' so that the changes can be seen on preview environment. After all the review process is completed on the preview environment, the final design can be activated by clicking 'Activate' button to see the changes on the live site.

Note: Once the design is activated the new global properties would be enabled for the entire market.

4 Enablement of New Header/Footer to Existing Templates

Step 1: Open any parent page within US folder, which is built out of old template, and select the Design mode.
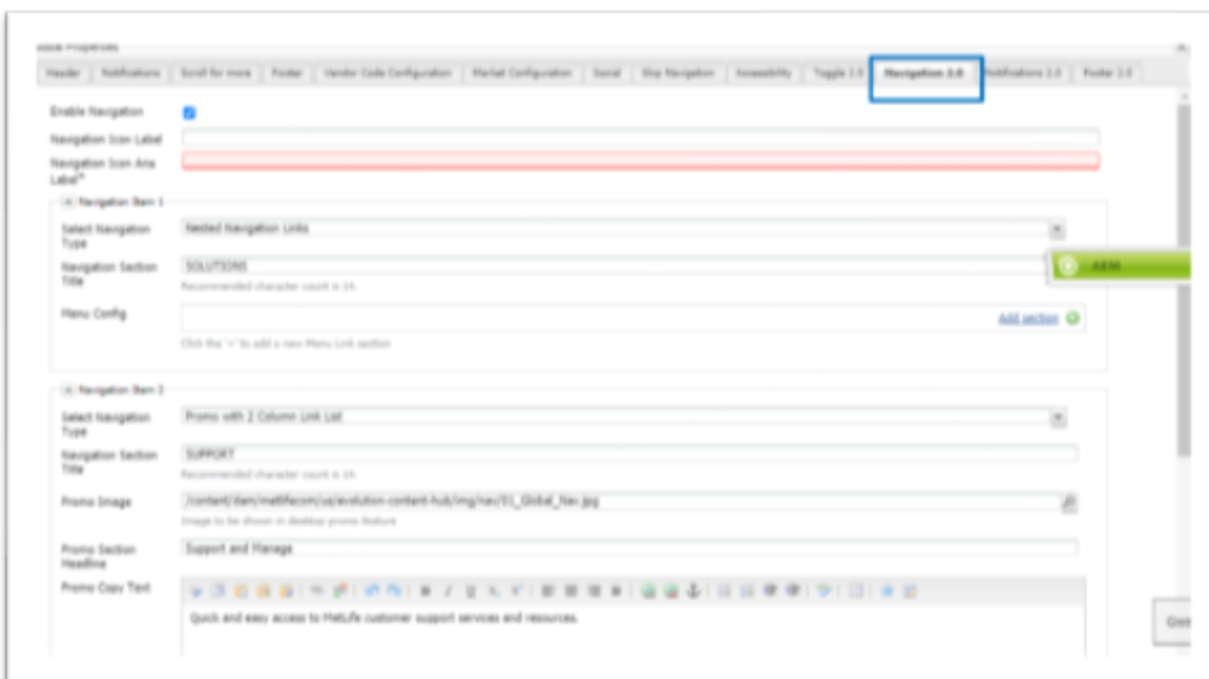
Step 2: Note that the new page built out of old template will have a new header and footer, consistent with the Evolution-based pages. This can be achieved by editing the *Global Properties*.

Step 3: Click on the *Global Properties* and Edit the tab **Toggle 2.0**. Select the checkbox for *Enable MetLife 2.0 Design*.
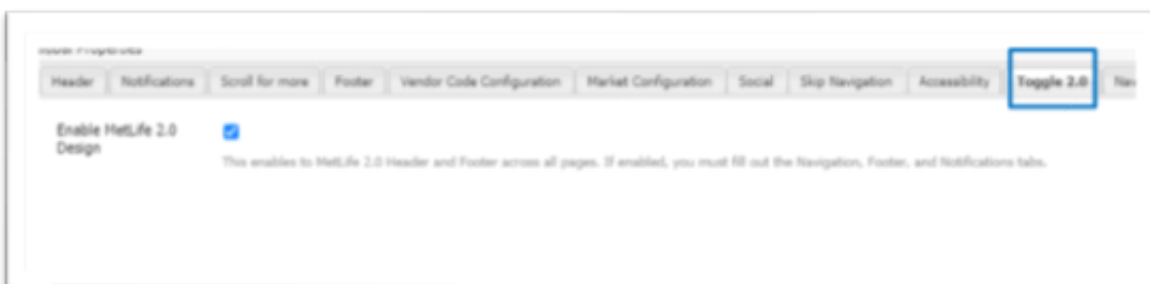
Step 4: Click on the tab *Navigation 2.0* to configure the Mega Menu.

Step 5: Configure the footer section of the page by authoring the required inputs in the *Footer 2.0 Tab.*

Once these 3 tabs are configured, the new header/footer of Evolution-based look and feel will be available in the old template.

Step 6: Activate the design in order to see the changes in preview and publish environment. Once the toggle is enabled, the changes can be seen on author environment. To see these changes on the preview environment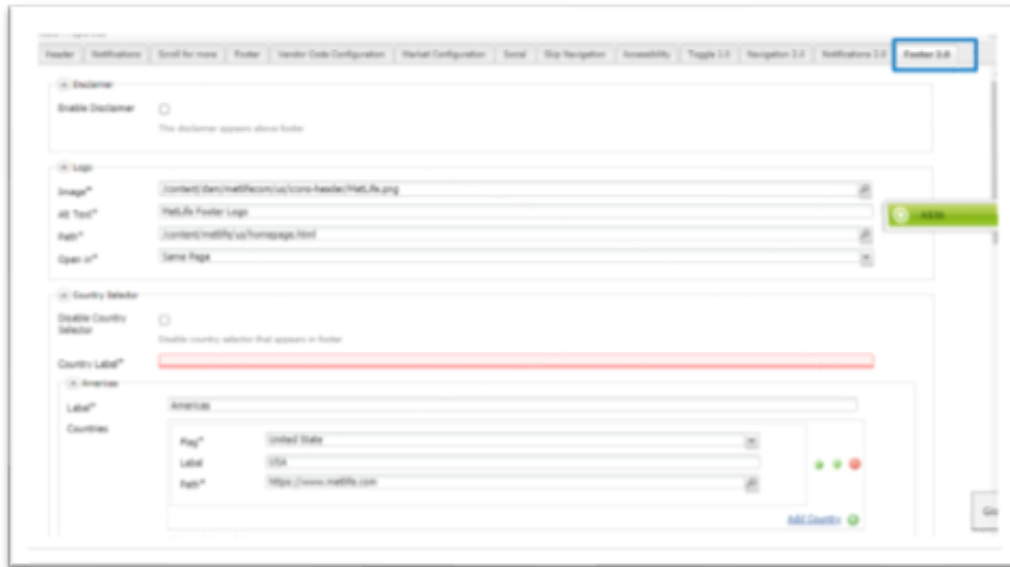, access the design path (/etc/designs/) and Sort by Modified you can see a Blue tick mark and modified by your name , Please select the design and click '***Activate(preview)***' so that the changes can be seen on preview environment. After all the review process is completed and finalized on the preview environment, whenever you are ready to publish the changes to the live site then only you need to click activate Option .
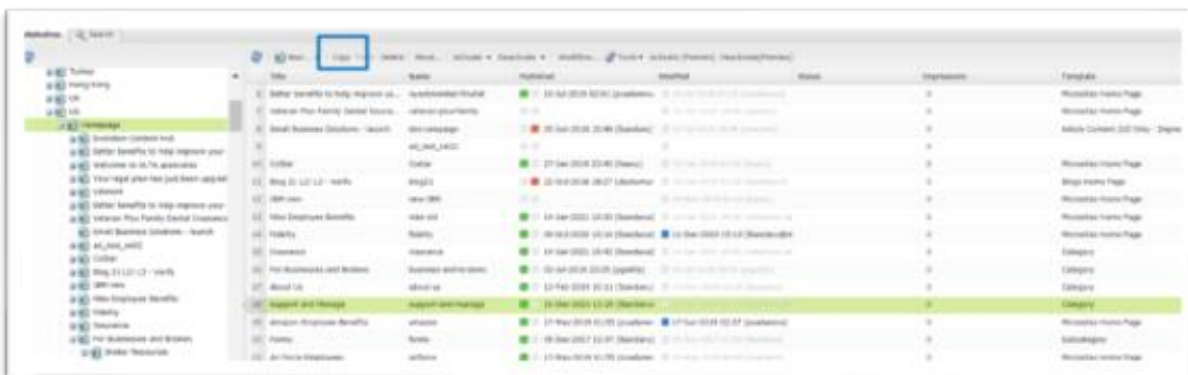

Note: Once the design is activated, irrespective of the pages the new global properties would be enabled for the entire market. For pages where toggle is not enabled, we would still see old navigation.

5. Migration of Old Experience to New Experience

Do you have business use case to retain an existing URL?

For SEO purpose if business needs to retain the same existing URL then market authors need to follow below listed steps, best practices.

Note: These steps are applicable for the pages inside home page (**Not Applicable for Home Page**).

Approach: AEM by default will not allow to create a new page with same name of an existing page under same location. It will suffix 0,1 or 2 at the end of the page name. As a best practice our approach would be to create new pages suffixed with '*refresh*'. when new pages are ready, old pages will be deleted. Old pages are deleted instead of renaming as existing page reference will be disturbed. Before deletion a backup of the old pages is taken. Post Deletion, new pages are renamed with actual old page names.

Step 1: Depending upon the page/folder/section which needs to be refreshed always ensure to take a backup on the same location or different location. As a general practice, a backup of the existing page will be taken on the same location. To take a backup, select the page and click Copy option.

Click *Paste* button to paste the page. Paste it in any path (Preferably on the same path). While pasting provide the new page name in this format *pagename-archive-date* for future reference.
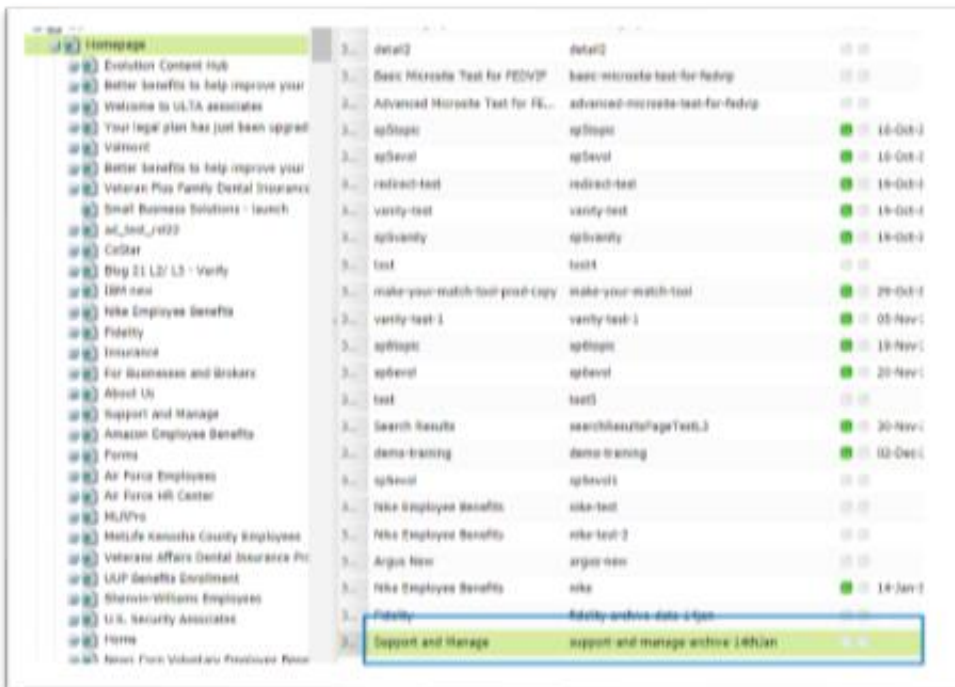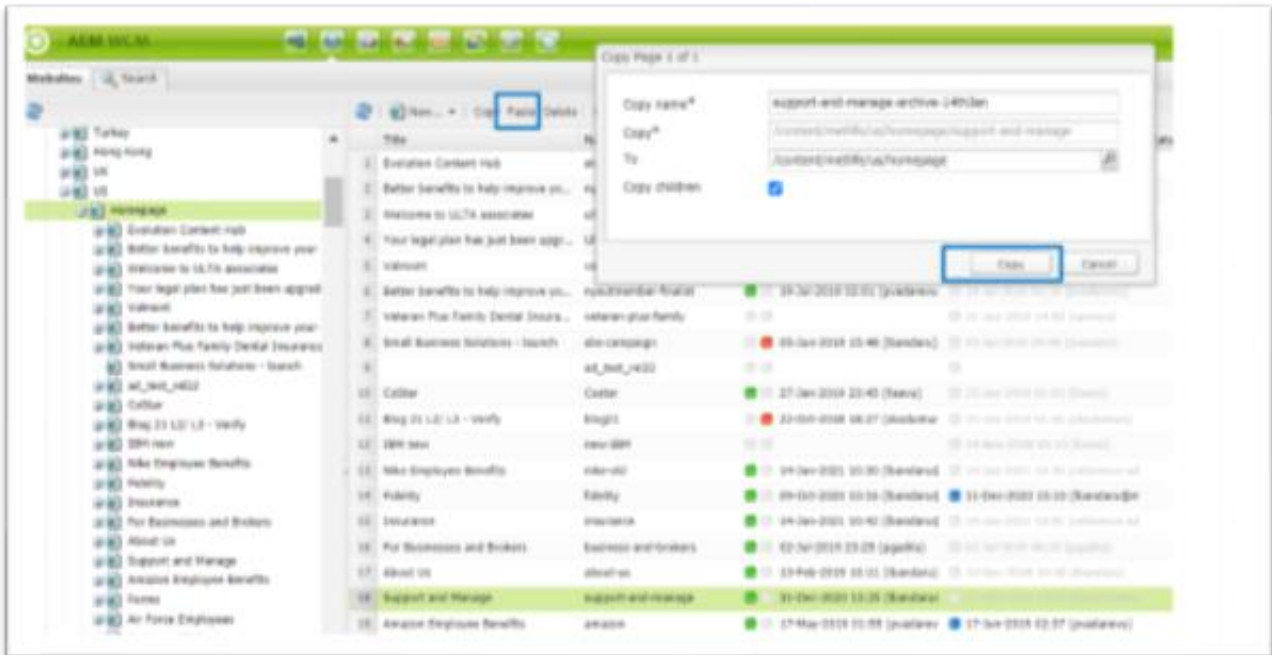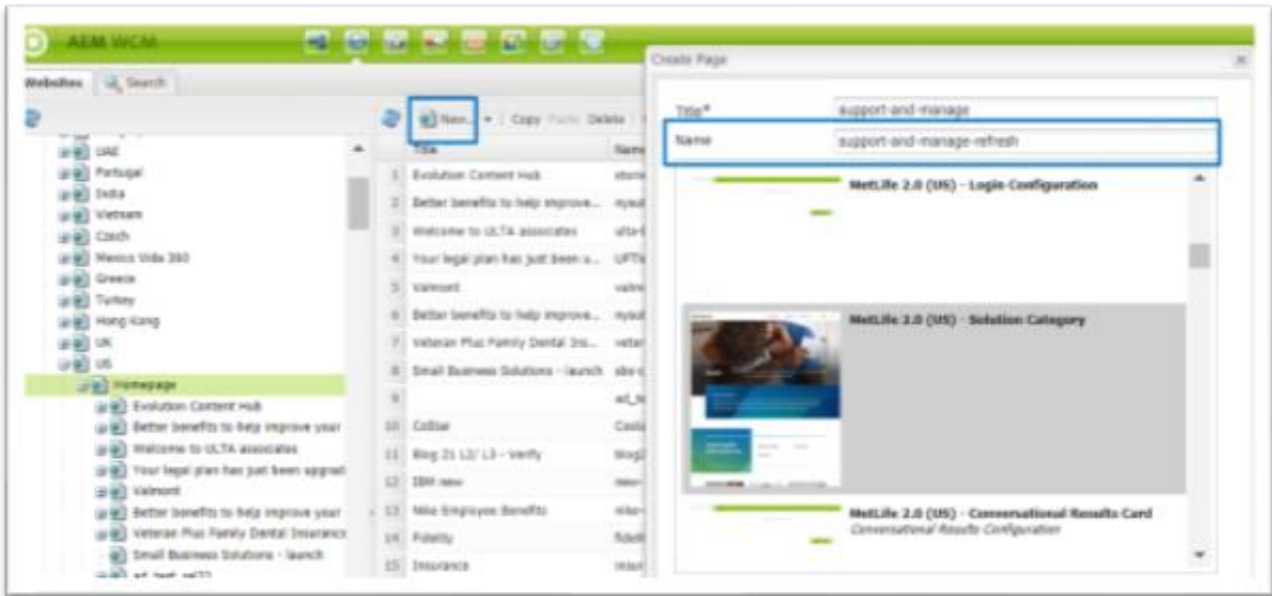
Step 2: Create a new page on the same path based out of Evolution 2.0 template. Provide new page name in this format pagename-refresh. Refer Section 3 for details on how to create Evolution-based pages.

Step 3: Author newly created Evolution-based page. Click '***Activate(Preview)***' Activate (Preview) once the new pages are authored and needs to be reviewed. Once it is fully reviewed and ready to be published only then delete the existing old page which needs to be refreshed by clicking the delete button.
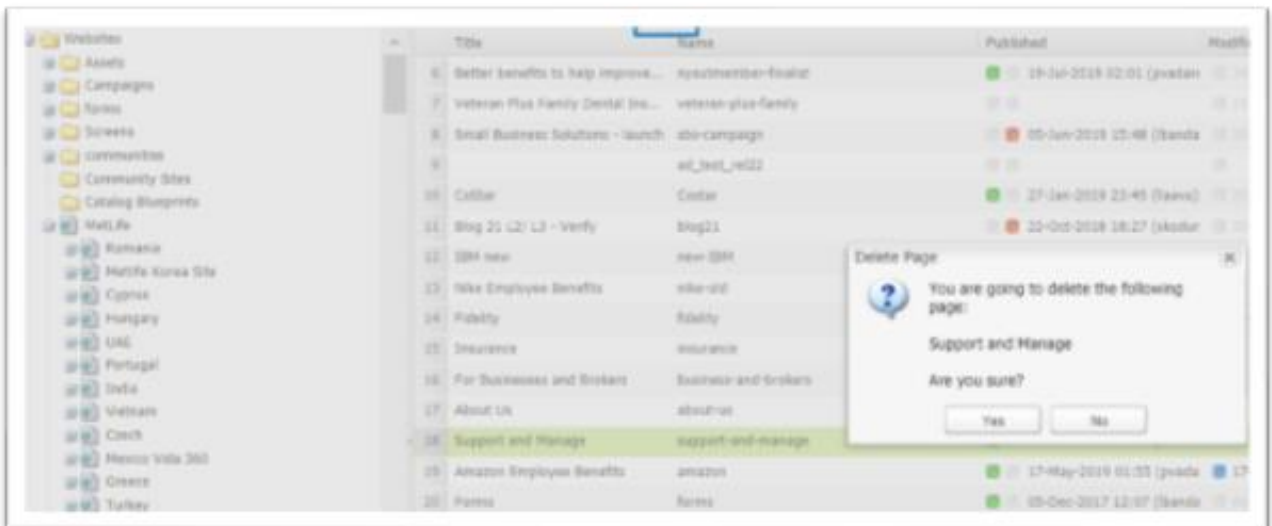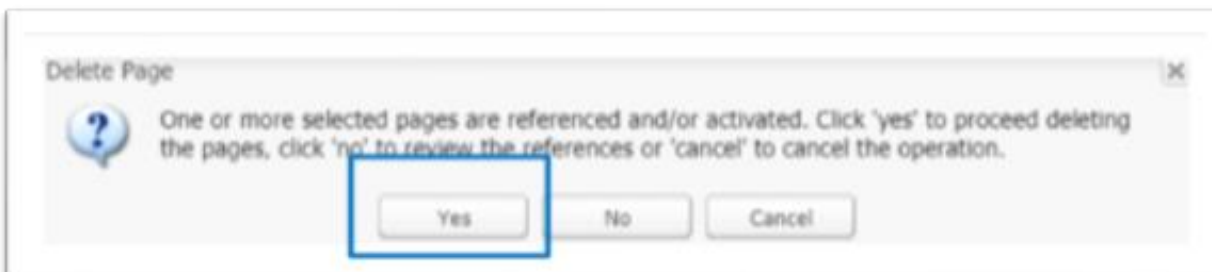
Step 4: Rename the newly created Evolution-based page from pagename, refresh to pagename by selecting the move option. Activate this page and child pages(any) once its renamed.
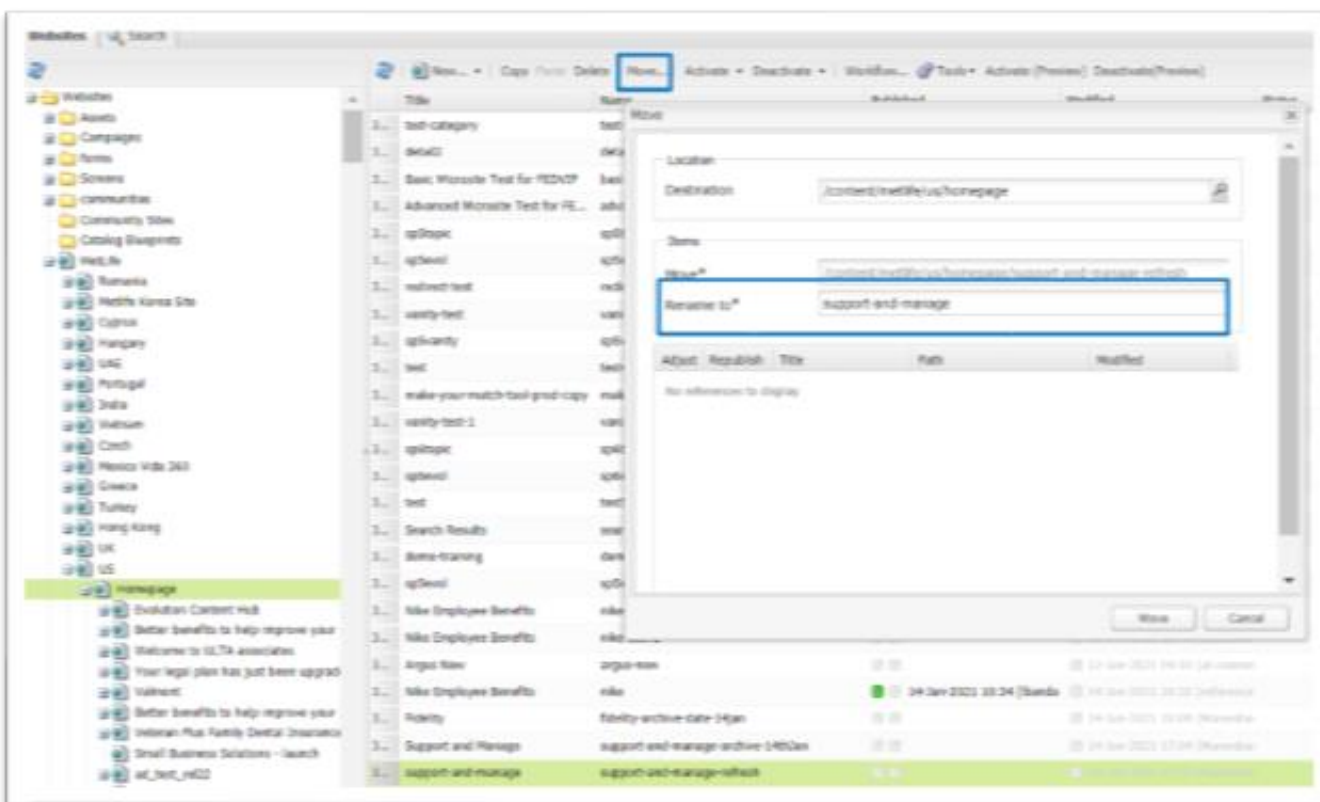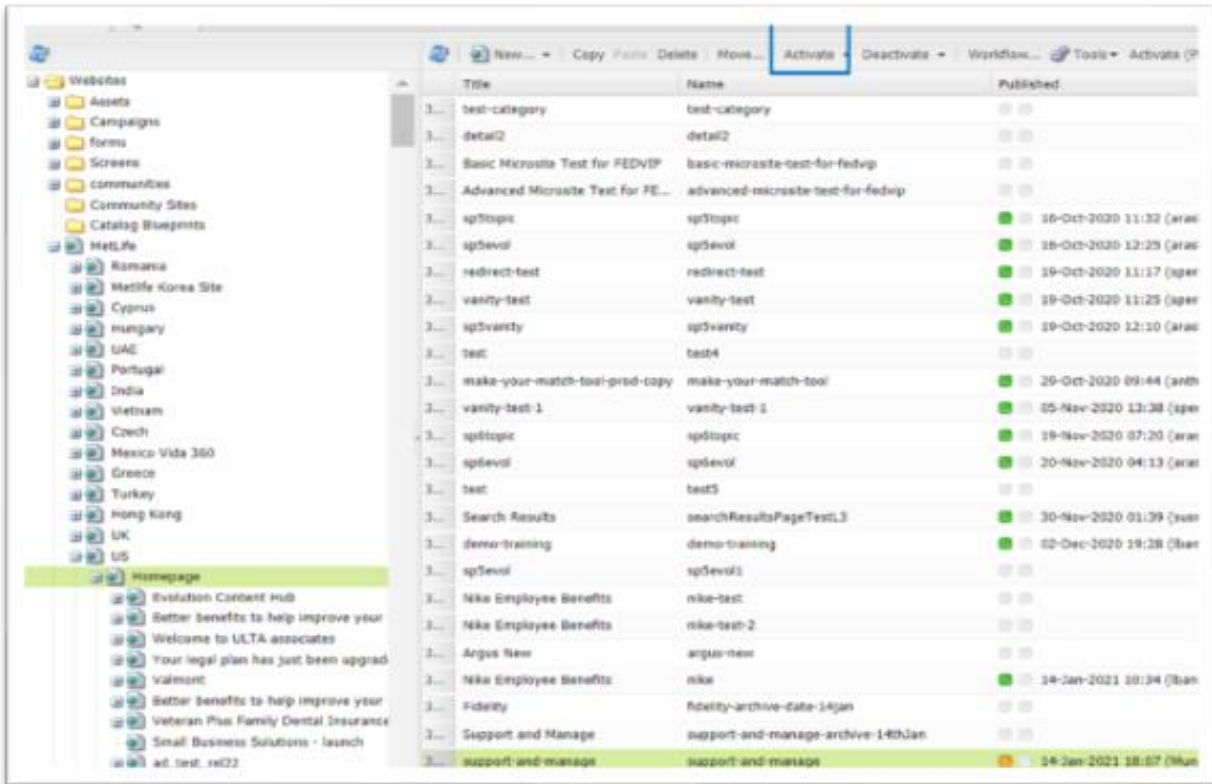
The page is now refreshed to Evolution-based template and is available on live site.

Note: In Step 3, when an old page is deleted there will be a downtime for a fraction of seconds. Therefore, it's necessary to rename the newly created page and activate it. The expected downtime will be not be more than 5 seconds. As a best practice, this activity can be performed post business hours.

Creation of New Experience with New URL:

To create a new experience with a different page URL, simply create the page wherever required by selecting Evolution 2.0 based templates. The detailed steps related to creation of page and enablement of new experience is mentioned in section 3.0

New Experience for Home Page:

The new homepage 2.0 should be ready if all the steps are being followed correctly. Market needs to coordinate with the Global IT team to plan and schedule a release date to replace the old home page with the new one.

6. Touch UI vs Classic UI

The Touch-enabled UI is now the standard UI for AEM, though the Classic UI is still supported.

- If cf# is added in the URL then the page will be opened in Classic mode.
  For Example:
  https://www.authormetlife.com/cf#/content/metlife/reference/homepage/component-library/search.html

- If editor.html is added in the URL then the page will be opened in Touch UI mode.
  For Example:
  https://www.authormetlife.com/editor.html/content/metlife/reference/homepage/component-library/search.html

- Dialog creation is separate for Classic and Touch based components.

TOUCH UI:

- Touch UI addresses the growing need for authors to be able to create and edit content on their tablets and phones while on the go.
- Touch UI is designed with the author in mind, allowing for easy updates using a Touch-device, while still supporting navigation with a mouse for users working on a laptop or desktop.
- Touch UI will provide common look and feel for all Adobe marketing cloud solutions. If we used editor.html then Touch UI will be opened when editing pages in AEM, several modes are available; including, in the Touch-optimized UI, Developer mode. This opens a side panel with several tabs that provide a developer with information about the current page.
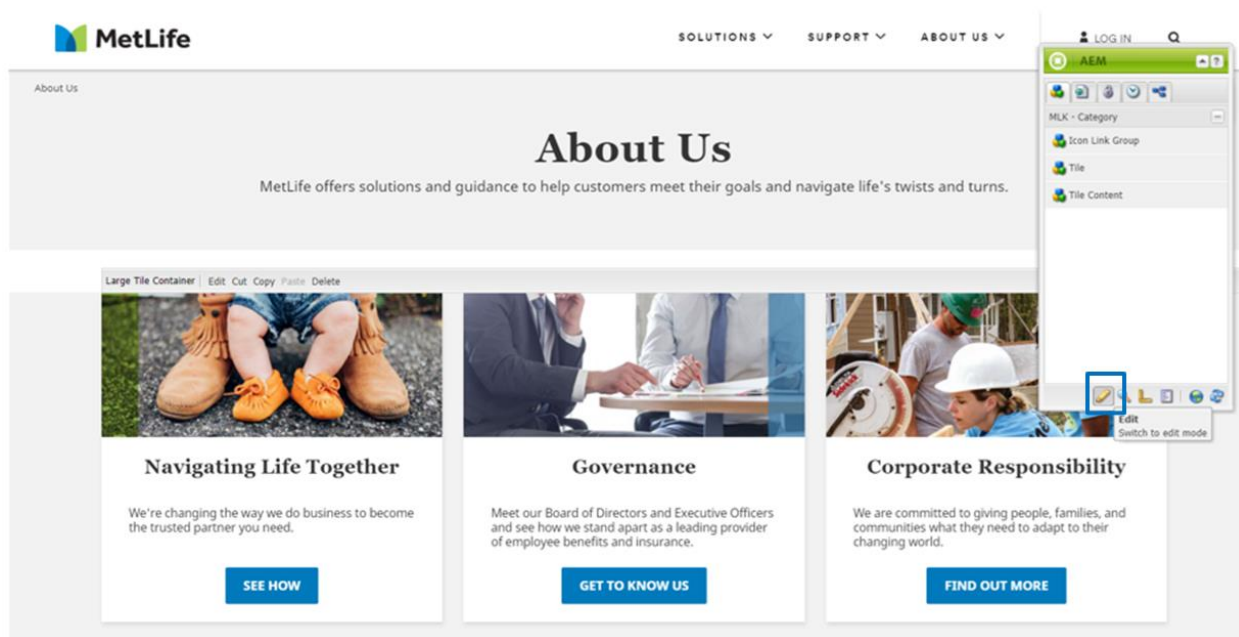
CLASSIC UI:

- Classic UI is used for desktop applications. This is not responsive. It's based on EXT JS framework (Sencha). Widgets, dialogs are based on EXT.js.

WHY TOUCH UI?

- Stay up to date with the latest from Adobe. This includes security and training.
- Software contains bugs and vulnerabilities that can be exploited. Adobe regularly puts out updates to correct these. With each new version of the software these are closed. And Adobe has stopped supporting the Classic UI.
- All of the training and documentation is now completely utilizing the Touch Interface, both from Adobe's side, as well as 3rd party content.
- The Classic UI is going away. While it is still supported, we expect that it won't be available for a longer time.
- The Touch UI improvements over the years have been impressive and include tools that allow you to do everything in Touch UI that you used to do in the Classic UI. And in most ways, the Touch UI is better than what the Classic UI offered.
- Some features in AEM are only available within the Touch UI. These include: Experience Fragments, and Content Fragments.
- It's going to become the unified interface for all of Adobe Experience Cloud products. They have consistently been working on the Touch Interface, and not just for Adobe Experience Manager. It makes easier for users to be able to know how to use them.
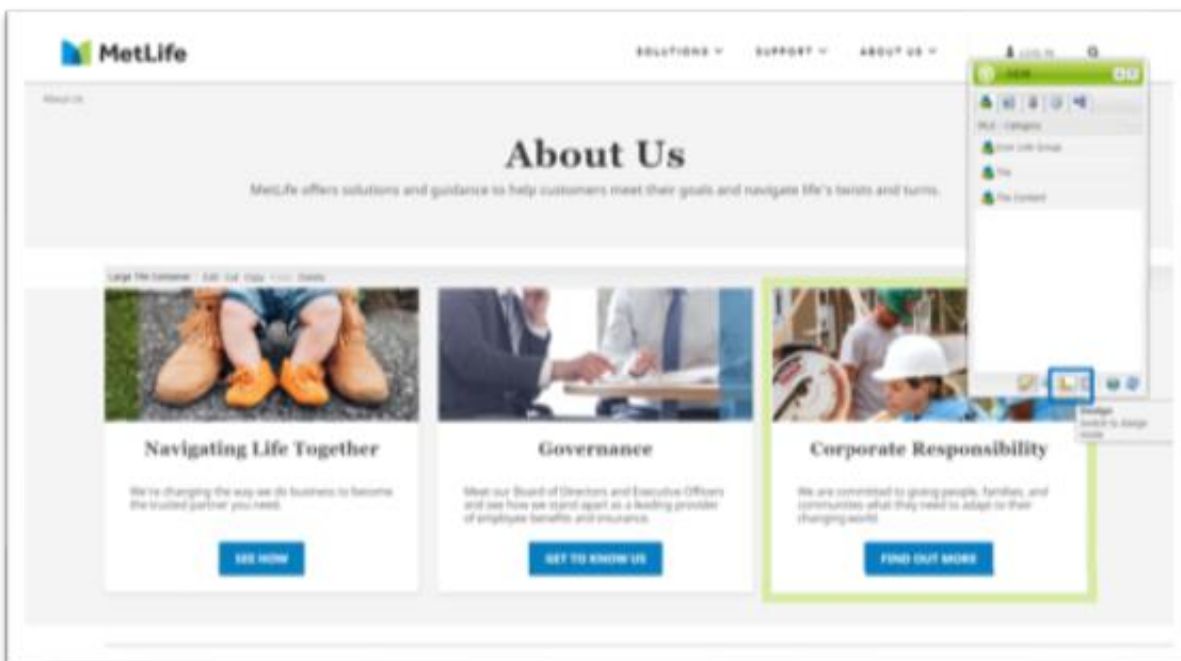
Edit Mode in Classic UI:

Edit Mode in Touch UI:
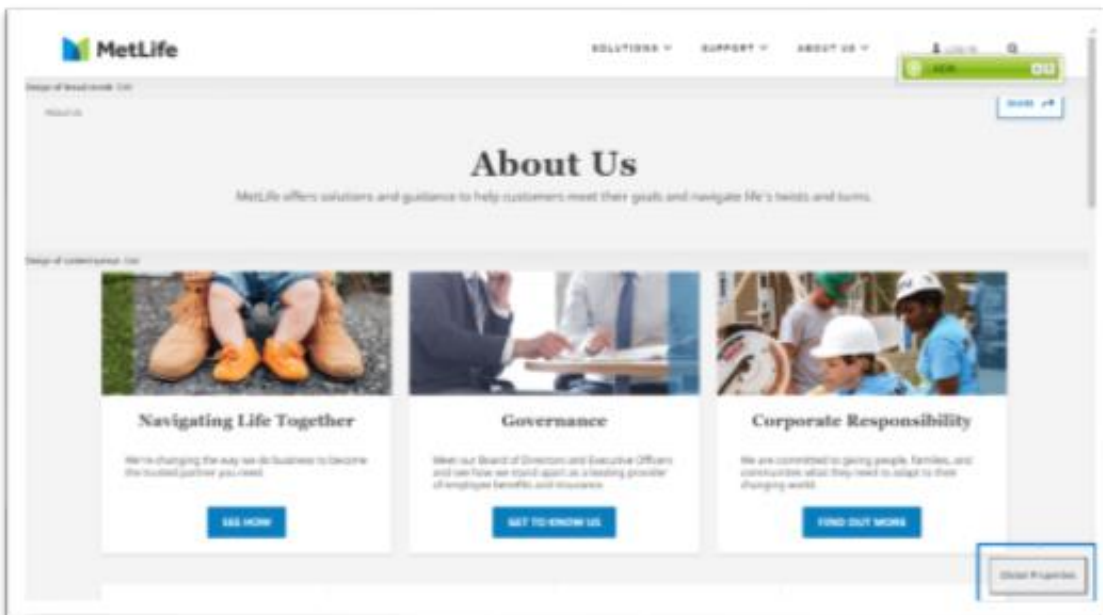
Design mode in Classic UI :
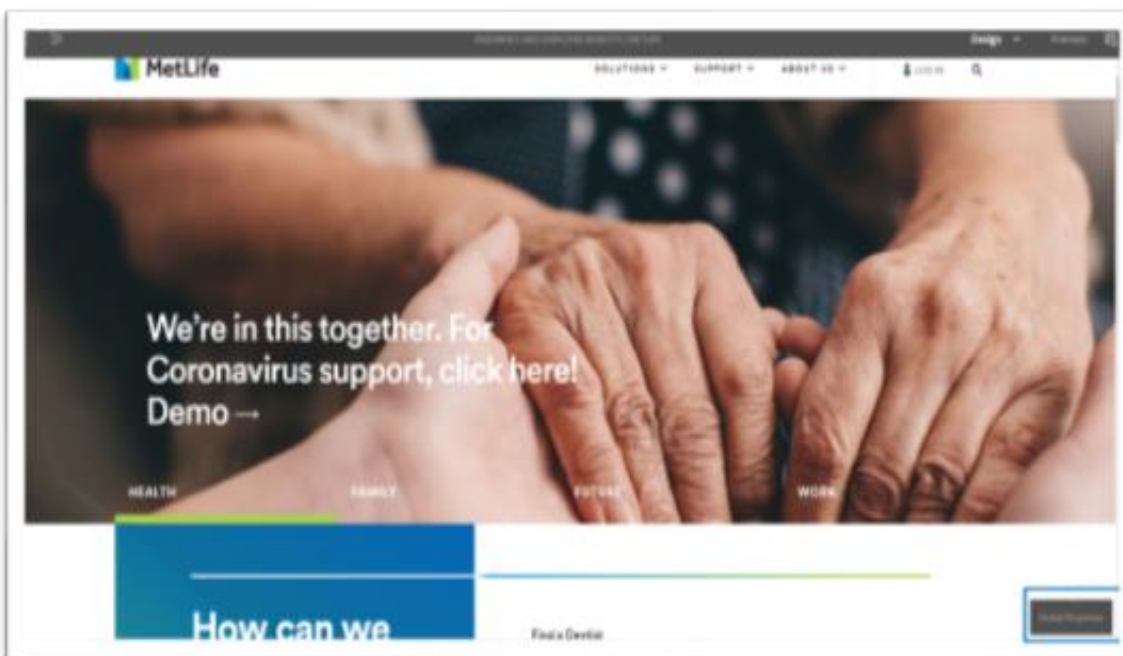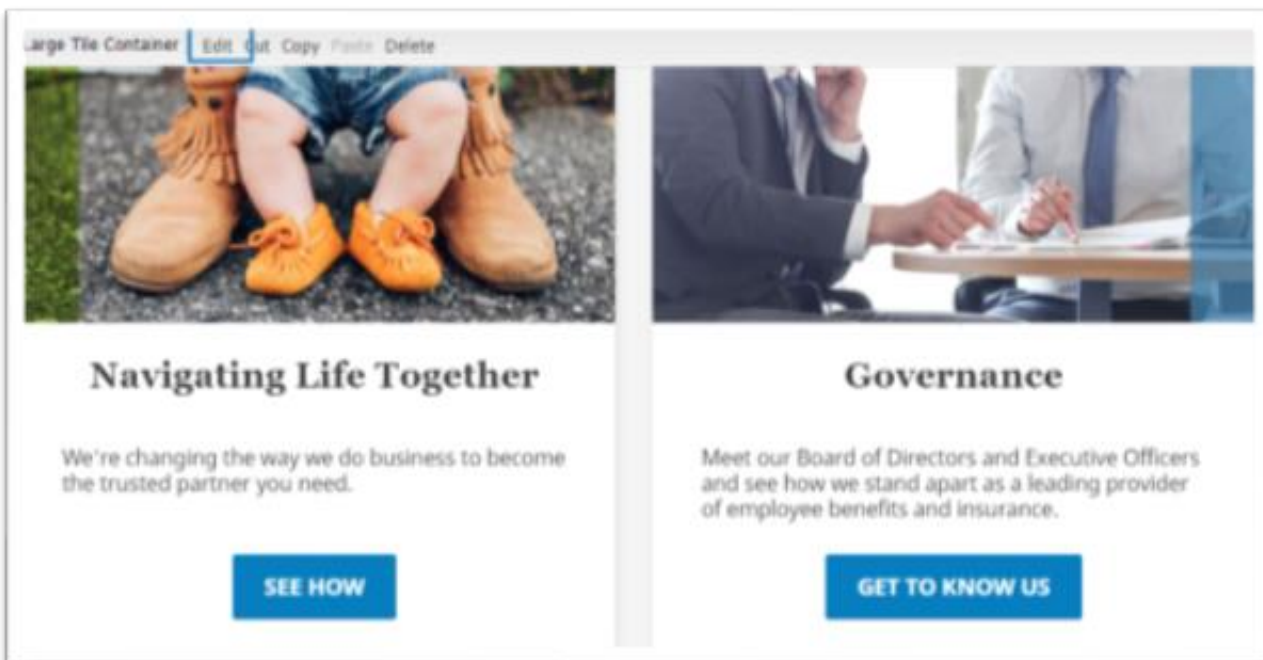

Design Mode in Touch UI :

Global Properties in Classic UI under Design mode :

Global Properties in Touch UI under Design mode:

Edit a component in Classic UI:

Edit a Component in Touch UI: