2019



dotCMS Product Brief

dotCMS Essentials

Key Concepts in dotCMS to Build & Manage Digital Experiences







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Inside the Brief

In the world of Content Management Systems (CMS), many vendors have their own nomenclature and even their own concepts, which can make it hard for outsiders to really know the difference of one CMS solution to another.

In this product brief,

we'll review the dotCMS essentials & how they provide value to your business team as well as how IT teams utilize a CMS to bring value to a business' overall marketing stack.



For Marketing & IT Teams

Selecting a new CMS is an exciting process for marketing and IT teams. In general, this process is a huge undertaking and, in most cases, only happens every 5 – 10 years. To help with this process, there is a plethora of checklists available for things like **Digital Marketing** or **headless CMS solutions.** Also, analysts like Gartner, Forrester, and more are available to help enterprises with their search. Still, checking off a spreadsheet of functional and technology requirements doesn't always answer fundamental questions that help you select the best content foundation for your content-driven applications as it's not enough to just have a website these days.

Enterprises are looking for

a platform that can support a variety of digital touchpoints and Internet of Things (IoT) devices in order to optimize their customer experiences. In this brief, we'll provide insight into the key elements of implementing a new CMS, specifically, dotCMS.

Implementing a CMS comes down to three key steps:

- 01. Setting up a Content Model
- 02. Setting up the Editor Experience
- 03. Building the Customer Experience

Before we go into these three steps and the concepts dotCMS brings to the table for marketers and IT teams, let's look into the main types of CMS solutions.



Types of CMS Solutions

In the CMS industry, there are various ways to look at CMS solutions. However, there are three key concepts to start with.

Suite Solution vs Best-of-Breed

In a typical digital marketing technology stack, there has always been a lot of functional overlap between a CMS, marketing automation, CRM, Digital Asset Management (DAM), Document Management System (DMS), and eCommerce platforms. When an enterprise is building out a complete digital experience platform



(DXP), selecting multiple applications is a given, since a true DXP doesn't come out of a single box. However, several vendors who have started in one specific business function have begun to move up the 'value chain' by adding in additional capabilities from other platforms, typically due to acquisitions or to supplement their current product capabilities. Suite Solutions...are not as flexible or user-friendly as best-of-breed platform capabilities.

Best-of-Breed solutions, allow you to take advantage of the leading digital experience platforms... ELEVENTIENTESTACE Headless CMS - Hybrid CMS Solution Contentful C

These platforms then become Suite Solutions, with examples like Adobe and Sitecore CMSs or Salesforce CRM. These Suite Solutions may work for some organizations, but many find that the added platform capabilities, like marketing automation to a CMS, are not as flexible or user-friendly as best-of-breed platform capabilities. A Best-of-Breed CMS is focused on CMS capabilities only, meaning other functions needed to make up your DXP can come from the outside technologies that your team already uses or wants to implement. Best-of-Breed, or API-first solutions, allow you to take advantage of the leading digital experience platforms, like Hubspot, Salesforce, Google Analytics, etc. or in-house technology, while still maintaining brand standards and consistency. dotCMS is an API-first, Bestof-Breed CMS.

Page-Based vs Content-Centric

Another differentiator between CMS vendors is the creation of the actual web pages. Historically most vendors started out as a page-based CMS solution, meaning there was tight coupling between the page and the actual content. **Content-centric CMS solutions have a strict separation between content and the presentation.** Webpages are created (most often on-the-fly or dynamically) with content coming from multiple parts of the content repository.

The most relevant advantages of a content-centric CMS are content reuse for omni-channel purposes (which is pretty much a given these days because of multiple touchpoints and IoT devices) as well as the need to operate as a <u>headless</u> or hybrid CMS. A content-centric CMS provides maximum flexibility for now and the future. dotCMS is a content-centric CMS.

Headless vs Full-stack vs Hybrid CMS

With the increase in digital and offline touchpoints for brands optimizing their customer experiences, along with the rise of the IoT devices comes the need to expose content beyond web pages and the need for more control over the experience. The popularity of headless CMS solutions is also driven by the desire to move away from the vendor locking of the presentation of web applications in their proprietary delivery tier, causing lack of flexibility for both developers and marketers, as well as an unnecessary long time-to-market and Total-Cost-of-Ownership (TOC).

Global

IoT Devices



Note, however, that pure headless CMS is not an optimal long-term answer. **Hybrid CMS solutions are more likely to survive as the idea of marketing engaging the development team every time they need a new page or item created for a digital campaign** (think landing pages, which sometimes need to be created daily), is unsustainable.

dotCMS is one of the few hybrid CMS solutions that also guarantees an undisrupted editor experience when managing applications in a headless scenario, due to its Edit Mode Anywhere capability, giving marketing teams have the best of both worlds.

A hybrid CMS provides maximum flexibility for today and the future. **dotCMS is a Hybrid CMS**.



With a hybrid CMS, the content can sit in the CMS repository or can be pulled in from an external content store (like a PIM solution or commerce engine). The presentation of the content can be done both by the CMS, an external application, or both.

All possible combinations are supported out-ofthe-box by a hybrid CMS, from a single deployment.

This offers excellent flexibility for technology teams to get the most out of previous investments while leveraging advanced technology to drive innovation.





Setting Up a Content Model

STEP 1: Converting Information Architecture into Your Content Model

To start, there are three main elements that need to be reviewed in order to transform the information architecture and wireframes into a dotCMS content model.

Content Types & Relationships

The cornerstone of the content model is the content types. They define the structure to create and manage data/information that helps to build an experience. Content is foundational in that regard:

01. Content Types:

Great examples of content types are news articles, blog posts, events, products, etc. The represent **repeatable sets of information** you want to expose to your audiences. For example, a news article has a Title, Summary, Body Text, Publication date/time, related content, etc. dotCMS offers an intuitive,

NoCode Content Type Builder to create your content types easily, without a single line of coding or developer engagement.

A large number of content types and attributes are shipped in the dotCMS starter project to help kick-start of your implementation.

02. Relationships:

An intelligent content model has relationships between different content types. Relationships are part of the content type definition and can **be defined through the Content Type Designer.**

The dotCMS starter project has several preconfigured content types included. An overview is provided at the end of this document.

det CMS Types & Tags Content Types			demo.dotcms.com
Global Search An	/ Content T 👻		
Content Type Name ©	Variable ©	Description ©	Entries
Page Asset	htmlpageasset	Default Structure for Pages	57 an hour ago
File Asset	FileAsset	Default structure for all uploaded files	729 an hour ago
Forms	forme	Forme	2 an hour ago
E Host	Host	System hosts information	2 an hour ago
Flickr	SocialNetworking	Creates a photo gallery from a Flickr feed	2 an hour ago
Device	PreviewDevice		9 an hour ago
Simple Widget	SimpleWidget	Use this as your default velocity container	21 an hour ago
E Event	calendarEvent	Calendar and events	9 an hour ago
Comments	Comments	Comments structure for all content	13 an hour ago
C Language Variable	Languagevariable	Default Content Type for Language Variables	0 an hour ago
Banner	Banner	Hero image used on homepage and landing pages	4 an hour ago
Employee	Employee	Employee or staff member	15 an hour ago
L Persona	persona	Default Structure for Personas	4 an hour ago
주 Vanity URL	Vanityurl	Default Content Type for Varity URLs	2 an hour ago
YouTube	Youtube	Drop a video on a page. (YouTube)	18 an hour ago
Testimonial	Testimonial	Client testimonial and rating	3 an hour ago
🖻 Blog	Blog		7 an hour ago

Content Type Designer in dotCMS

Building Taxonomies in dotCMS

ΤοοΙ	Level of Code	Learn More
Content Type Designer (Content Types & Relationships)	NoCode	Watch Demo>>

Taxonomy

One of the most critical aspects of a content model/CMS implementation is how to organize the content. It's the make or breaks with regards to search/findability and a primer for dynamic, real-time content targeting and personalization. Building taxonomy comes down to creating tags, categories, relationships, and folders. dotCMS provides the NoCode tools to support this process.



01. Categories

Categories are dropdown lists of predefined labels. Webmasters often prefer to present users with predefined lists because they can be used reliably on dynamic pages to pull content whereas tags can be difficult to predict.

02. Tags

Via the tags portlet, existing tags can be searched, deleted, and assigned to specific websites. External tags can also be imported in batch (CSV file) or exported (CSV).

03. Relationships

An intelligent content model has relationships between different content types. Relationships are part of the content type definition and can be defined through the Content Type Designer.

04. Folders

The dotCMS folder structure provides a natural hierarchical structure that can be used to categorize your pages and content. Combined with permissions, this offers the support for virtually any content governance model.

Filter RESET Show Global Tags		
Tag Name	Site	Add Tag
	demo, dotcms.com	Import Tags
□ sfrica	demo.dotams.com	Export Tags
	demo.dotoms.com	Delete Tags
	demo.dotams.com	
	demo.dotcms.com	
australia	demo.dotoms.com	
billionaire	demo.dotoms.com	
brazii	demo.dotoms.com	
	destron de contra de contra	
C china	demo.dotama.com	
credit cards	dema dotoms com	
dollar	demo.dotoms.com	
estate planning	demo.dotoms.com	
	demo.dotcms.com	
french	demo.dotema.com	
	demo.dotams.com	
home prices	demo.dotams.com	
	demo.dotams.com	
	demo.dotams.com	
international	demo.dotams.com	
	demo.dotcms.com	

Building Taxonomies in dotCMS

Tools	Level of Code	Learn More
Category Manager	NoCode	Watch Demo>>
Tag Manager	NoCode	Watch Demo>>
Content Type Designer (Relationships)	NoCode	Watch Demo>>

External Content

When managing customer experiences, the data & content needed to create relevant digital experiences typically doesn't reside in just the CMS. It is quite common to have content that resides in adjacent applications that marketing leverages to build hyper-personalized experiences, such as a CRM, Marketing Automation, eCommerce, Digital Asset Management, Video Management Platforms, etc.

In dotCMS, this type of content can stay where it is and doesn't have to synchronize with the dotCMS content repository (which some CMS vendors require), instead, the content can be accessed and searched through the authoring environment as if it was. Widgets in dotCMS can be used to bring external content into the dotCMS environment or expose it in combination with dotCMS-contained content.

Examples of this type of widget are the YouTube and Vimeo widgets, that leverage externally hosted content (video files

Relationships Processon Hillion		
	Stanly	
	SEARCH	
	How to ski a common mistakes and How to ski 3 Common mistakes	
	Author: Beamp It Tutaniala	
	tengit	
	736	
	hordnat Smat	
	international and antime. Https://lysting.com/nil/7mths2gQtbg/dmf.uik.jpg	
	Thumbnal Lorpe:	
	https://signa.com/sign	
	Publicat	

in this case) seamlessly to a dotCMSpowered webpage.

01. Widget controls

In the widget properties, next to the actual YouTube URL, there is a number of properties that can be set (via NoCode) by the CMS user to control the display of the external content (YouTube video in this case), such as title and author. The number of properties per widget is extensible and can be tailored to your specific needs. The essential advantage of this construct is that it creates a consistent editor experience. **dotCMS provides the technical tools and connectors to build these seamless integrations,** to ensure this seamless experience for marketing teams.



The Editor Experience

STEP 2: Setting up a content management process, supporting governance, and compliance

≡	detCMS Types & Tags Content Types > Banner					demo.dotcms.com	۵.
*	FIELDS RELATIONSHIP PERMISSIONS PUSH HISTORY						
Ψ	Content Type: Banner						
•	Image: Second					RESET	PERMISSIONS
•		View	Add to	Edit	Publish	Edit Permissions	
• •>	CMS Anonymous						
•	APPLY CHANGES	Reset all children permi	issions to match the above?				
	Content Type Permissions in dotCM	S					

The editor experience is already partly defined in our first step through the creation of content types and the mandatory (and optional) content attributes that can be captured during the content creation process. We've also addressed the integration with external systems; however, there are more tools that impact the editor experience.

Permissions

dotCMS offer a very granular permissions module that can support any governance model and can **go as granular as a single content attribute/field.** It's as simple as merely checking which role and/or a user should have access to edit or view which type of content.

Workflows

The size of the digital marketing team and the industry your organization is operating in can dictate a content governance model. This is particularly in industries with highly controlled content (pharmaceutical, medical devices, etc.) where the content approval and publishing process tends to be a bit more elaborate than others. **For dotCMS, the complexity of your content governance is a non-issue as we offer a key differentiator over the competition:**

A NoCode tooling that allows for sophisticated, multistep content approval workflows in any shape or form, without development effort. Within every step, multiple sub-actions can be defined, such as Four Eyes Approval, notifications, etc. Setting various workflow schemes on a single content type is possible as dotCMS does not have any restrictions in that regard.



dotCMS has a large number of preconfigured sub-actions shipped with the starter project. An overview is provided at the end of this product brief. Custom subactions can be developed to extend upon the core product. For dotCMS, the complexity of your content governance is a non-issue...

Adding an extra workflow step & then sub-actions in the step is a 100% NoCode activity,

and at the same time, your technology team can add their own code.

Preview

For content editors, it is essential to see how content will be exposed to their audiences before it is actually published. Vital aspects to previewing the content are the context (device, language) as well personalization (when personas are defined). **dotCMS offers both capabilities out-of-the-box, even if the content is rendered elsewhere** (see Edit Mode Anywhere). The number and specific devices for preview are extensible to your business needs.

CIMS Types & Tags Workflows	demo.dotoms.com 💧 🌏
Action Information and Permissions	③ Save
	Cencel
Nang	
Not Sep.	
Current Step *	
Who can Use	
· A00	
·	
(and the second s	
Show When	
Citize Colored Citized	
AND	
Locket Divodes	
AND	
New E Published E Unpublished Archived Al	
Comments and Assigns	
🔁 User can Asalgn 🛛 🖉 Allow Commenta	
Assign Ta:	
Current User -	
Duston Code:	



Inline Editing

When content is being previewed, content editors can come across typos or may need to make some small, last-minute changes before content is actually published. **In dotCMS, this scenario is easily supported with inline editing capabilities.**

In addition, the editor can see what the changes have been made against the current version before they publish.



Content	Relationships	Permissions	History		Language
				Site:	English (US)
					Workflow
				Blog Headine: Bill Ackman's Top Stock Picks	Workflow: System V
					Step: New Assignee: Nobody
				URL Title: /blogs/bill-sckman-s-top-stock-picks	
				Author:	
				Insider Monkey	
				Publish:	
				8/26/2011 - 8:37 PM -	
				Dody:	
				File - Edit - Insert - View - Format - Tools -	
				Formats * B / U & E E E E E E E E E E E E & E & E & E	
				Bill Ackman is the founder of Penshing Square. His main area of expertise is in the field of special situations investments. He is a long-term value investor who seeks to profit from investing in stocks with short-term price drops. During 2009 and 2010, Bill Ackman's stock returns exhibited option-like characteristics.	
				He is most recently known for his investment in General Growth Properties (GGP). During the Ira Sohn Conference of 2009, he recommended investors to purchase of GGP. The stock returned more than 1000% since then. In 2010, Actman returned 29.7% mostly because of his investment in GGP.	
				Bill Ackman is known for his concentrated portfolio. Pershing Square's 13P portfolio is made up of companies beioriging solely to the Consumer Goods, Financial, and the Services sectors. Once Bill Ackman discovers a company which he believes to be a good company setting at a discount price, he actively pursues it. Fortune Brands Inc (Cg) is one of these companies. In anatter of days, he spent more than 150 million on FO (most net double for double for actively pursues it. Fortune Brands Inc (Cg) is one of these companies. In anatter of days, he spent more than 150 million on FO (most net double for double for the companies).	
				During the second quarter, Bill Ackman sold off Corrections Corp America (CXXV). Since the end of June, the company has lost 2%. Moreover, in the same quarter the converted his JC Penney (JCP) call options into stock positions. JCP lost -24% since the end of the second quarter. Here are Bill Ackman's top stock picks at the end of June:	
				Company Name Ticker Valin (£1000) Return Sins Jan Activity PRINKY / C CCD 323248 -2449 1149 Central L, Gouvin Horts GCD 320348 -2449 1149 Central L, Gouvin Horts GCD 320348 1049 114 Central L, Gouvin Horts GCD 320348 1049 114 Mark Y DOOS INC GCD 323128 749 749 Mark Mark Hubels CORP CHES 323128 749 749 Mark Mark Hubels CORP CHES 32314 749 749 General Mark Mark Mark Mark Mark Mark Mark Mark	
				According to the June filings, the largest holding in Penshing Square's 13F portfolio is JC Penny. Bill Advanan also owns \$12 million worth of JCP call options. At the beginning of June, <u>Bill Advanant profiled around \$200 million</u> when the proces of JCP were tup more than 3A. However, since the end of June, JCP has lost 27%. Ken Flaher managed to bill advance and advance and advance and advance and advance and the process of JCP were tup more than 3A. However, since the end of June, JCP has lost 27%. Ken Flaher managed to bill advance advance and advance a	
				Bil Ackman initiated a brand new position in Family Dollar Stores in the second quarter of June. He had \$503 million in FDO at the end of June. However, since the end of June, FDO has lost 9%. John Paulson also has a stake in the company as he purchased FDO during the first quarter of 2011.	

Page Composition

For a high content velocity and time-tovalue, it is crucial that marketers can make changes to the page composition without having to go back to developers. This is one of the many NoCode tools dotCMS offers where **content editors can drag & drop content around the page without the engagement of a developer.** Content is automatically scaled up/down when dragged to a different sized column.

Page Layout Editing

Whereas other vendors require the involvement of developers to make new templates or changes to existing templates,

dotCMS offers a 100% NoCode Layout Editor.



When switching to layout mode, **marketers** can make changes to the layout, such as adding/removing columns, changing the width of columns, etc.

This means that for an initial implementation it will suffice to create a limited number of page templates since new templates can be created in a couple of clicks. This lowers the level of effort for initial implementation as well as ongoing application maintenance, and therefore the decreases the TOC.

Edit Mode Anywhere

The recent released (V5.1)

Edit Mode Anywhere capability allows for an undisrupted editor experience in cases where

dotCMS is used as a headless or hybrid CMS.

This means that marketers still have access to tools like preview, inline editing, drag & drop (page composition), personalization and page layout editing. This capability mitigates the most common issue for marketers when working with a headless CMS. **It avoids having multiple CMS solutions to manage the experiences for all digital touchpoints,** with the associated risks like inconsistency in branding, content, and experience.

Building Taxonomies in dotCMS

For the Marketing Team

Tools	Level of Code	Learn More
Workflow	NoCode	Watch Demo>>
Preview	NoCode	Watch Demo>>
Inline Editing	NoCode	Watch Demo>>
Page Composition	NoCode	Watch Demo>>
Page Layout Editing	NoCode	Watch Demo>>
Edit Mode Anywhere	NoCode	Watch Demo>>



The Customer Experience

STEP 3: Building an Engaging User Experience

The implementation of a new CMS typically coincides with a redesign of the entire experience. Converting the IA, UX, and visual design from the creative team or agency into manageable pages **in dotCMS will mean converting these concepts into themes, page templates, content, and** **configured widgets.** These are all building blocks that are leverages to build out the new experience.

Themes

dotCMS Themes provide a powerful way to abstract and share a consistent look and feel across a site or sites. **Themes work** with the Template Designer, which

allows content editors to create their own templates using themes without any HTML knowledge.

Themes are simple to create and manage. Themes are just a collection of CSS/JS files, images, and velocity files (either custom or using a standard framework), which are integrated into the dotCMS Theme Builder via references to specific classes and Velocity variables. The dotCMS starter site comes with several predefined Themes based on the Bootstrap 4 framework, each of which includes template files which demonstrate how to integrate your own themes into dotCMS.

Widgets

Widgets are front-end building blocks that help marketers to build experiences and expose content, without having any technical knowledge. The content can sit in dotCMS or come from an external system. The widget is a combination of business logic and content. One popular widget is the Photo Gallery Widget, which **allows marketers to drag & drop the widget on a page and expose a photo gallery** to visitors. Marketers only have to specify the controls that are exposed to them in the pop-up of the widget. The number of properties or controls that are exposed is easily configurable (a NoCode effort!).

01. Widget controls

For this particular widget, the marketer can specify a 'Widget Title', 'Folder' that hosts the photos for the gallery, and the number of photos to be displayed.

02. Photos in the Content Repository

Through the widget pop-up menu, a user can select a specific folder that hosts the photos to be displayed.

CMS little summer strong		demo.dotoma.co
Photo Gallery		
Content Permissions History	References	Language
		English (US)
	Widget Title:	Lock for Editing
	Photo Gallery	Lock for Editing
	Folder:	Workflow
	res-images 👻	Workflow: System Work
	Number of Results:	Step: New Assignee: Nobody
	50	Assignee: Nobbdy
Photo 0	Gallery Widget in dotCMS	

Q demo.dotome.com						
C about-us	English (US) 👻			Show Archived		
(BC) application						
C) bear-mountain	Name	Menu	Status		Mod. Uver	Mod, Date
C images	A hate/10.jpg		0	🐜 (en.US) hotel fill jog	Admin User	09/25/2014 06:03:37 PM
S photo-gallery	A hosel9.pg		0	🐜 (en.,US) hotel0.jpg	Admin User	09/25/2014 06:03:37 PM
C) contact us	D hotel8.pg		0	(en, US) hotel3.jog	Admin User	09/25/2014 06/03/35 PM
C) demos						
⊡go-quest	A hote7,pg		0	🐜 (en_US) hote(7.jpg	Admin User	29/25/2014 06:03:35 PM
Chome BChimages	hanel6.jpg		0	Here (en. US) hotels (og	Admin User	09/25/2014 06:03:36 PM
BC) intervet	D hove5.pg		0	🚾 (en_125) hotel5.jpg	Admin User	09/25/2014 06:03:35 PM
⊞C: news events	A hatel4.jpg		0	(en_US) hotel4.apg	Admin User	D9/25/2014 06:03:35 PM
D producto BCD resources	😫 hotel3.jpg		0	(en.US) hotel3.jpg	Admin User	09/25/2014 06/03:35 PM
BD services	Antel2.pg		0	(or_10) hote(2.jpg	Admin User	09/25/2014 06:03:35 PM
(BC) Training	A hotel1.pg		. 0	w (crUS) hotel1.jpg	Admin User	09/25/2014 06:03:35 PM
	D hotel0.pg		0	(en.(JS) hotel0.jpg	Admin User	09/25/2014 06:03:34 PM

03. Webpage Exposing the Photo Gallery

Once the widget and page are configured, this is what the user would see on their screen.

At the end of this document, an overview is provided of the built-in widgets that come with the dotCMS starter project that can be leveraged in your project.

Page Templates

Due to the nature of dotCMS and the high level of NoCode that it brings with the Page Template Builder, only a few templates have to be set up out of the gate. **dotCMS offers two types of templates: a Standard Template and an Advanced Template.** The page templates bring all building blocks and content together into a dynamically rendered experience. If marketing teams want to use the NoCode Page Builder, then the standard page template is used. The



advanced page template cannot be used with the Page Builder and is typically only used by web developers to get more control on the template from a development perspective. The page template creates a relationship between the theme, content containers, widgets, and page layout.

dotCMS offers two types of templates: a Standard Template & an Advanced Template.

Standard (Template Builder) **Template**

Page

Standard (Template Builder) Template

Theme
• Styling(CSS /Sass/Less) & Common Elements (Header,Footer, Navigation)
• Re-usable in multiple Templates
Content Item: (Content Type A) Re-usable in multiple Containers
Content Item: (Content Type A) Re-usable in multiple Containers
Widget: Code which re-usable in multiple Containers
• Allows users to add content specific Content Types to the Page • Re-usable in multipleTemplates
Evenue of the page
• Re-usable in multipleTemplates

• Code & styling which is re-usable in multiple Templates

• Layout of Containers & Theme elements on the Page • Re-usable in multiple Pages

 \cdot Located in a specific folder & at a specific URL on your site

Advanced Template

Page

Advanced Template

Content Container

Content Item: (Content Type A) Re-usable in multiple Containers

Content Item: (Content Type B) Re-usable in multiple Containers

Widget:

Code which re-usable in multiple Containers

 \cdot Allows users to add content specific Content Types to the Page

• Re-usable in multipleTemplates

Zero Content Container

 \cdot Code & styling which is re-usable in multiple Templates

- · Code & HTML implementing:
- 1. Styling (CSS/Sass/Less)
- 2. Common Elements (Header, Footer, Navigation)
- 3. Layout of Containers on the Page.
- \cdot Re-usable in multiple Pages
- \cdot Located in a specific folder & at a specific URL on your site

TRUSTED, CONTINUOUS & CONNECTED CUSTOMER EXPERIENCES

Personalization

dotCMS offers the tools you need to target and personalize the experiences your audience has while engaging with your brand, including the connection of various touchpoints manages within your dotCMS platform. These essential tools allow for persona definition and the creation of your own specific business rules.

01. Personas

In dotCMS, personas are a content type. Creating a new persona is very straightforward and intuitive via the authoring environment.



02. Rules Manager

dotCMS ships with a very intuitive rules manager that allows marketing teams to **define business rules that help to influence the content visitors experience.** Multiple conditions can be defined that will activate a specific rule that then performs one or more actions. dotCMS comes with a predefined set of conditions and actions, but these are extensible by your in-house developer team with custom conditions and actions. So, setting the persona for all anonymous visitors coming from Facebook pages with a mobile device would look something like this:

An overview of the standard conditions and actions that can be used in dotCMS is provided in the table below and are shipped with dotCMS out-of-the-box. This is an extensible framework, and your development team can easily extend this set with custom conditions and actions to your liking.

Example		Evaluate Every Page	÷	Cannot save, action is not val
This Rule fires when:				
Browser Language	*	Is	← English	•
When fired, this Rule performs the following action(s):				
Set Persona	+ Choose a Persona			1
✓ Example		Evaluate Every Page	×.	Cannot save, action is not val
This Rule fires when:				
Device Type	*	Is		•
When fired, this Rule performs the following action(s):				
Set Persona	 Choose a Persona 			
✓ Example		Evaluate Every Page	*	Cannot save, action is not val
This Rule fires when:				
Has Visited URL	*	Is	✓ Visited URL	
When fired, this Rule performs the following action(s):				
Set Persona	- Choose a Persona			



Conditions & Actions in the dotCMS Rules Engine

For the Marketing Team

Conditions	Actions
Browser	Add Tags
Browser Language	Redirect To
Current URL	Set Persona
Device Type	Set Request Attribute
Has Visited URL	Set Response Header
Logged In	Set Session Attribute

Mapping Content

Once personas are defined, you can map them to content objects. It's the same process used to map content for individual tags. In the example below, a banner is mapped to the persona 'Mobile Facebooker':

Example			
This Rule fires	when:		
	Device Type	•	
	Browser		
When fired, thi	s Browser Language		
	Current URL		
	Device Type		
	Has Visited URL		
	Logged In		



Supporting Your CMS Evaluation

Evaluating a new CMS is an intensive and elaborate process for any organization. It's crucial to do this right because replacing a CMS solution is not a seasonal activity. Organizations typically tend to stick to a CMS solutions 5-10 years, unless there is a compelling reason to move off faster.

dotCMS offers several options to simplify and support the CMS selection process,

which also provides the most real insights in the product capabilities.



01. Enterprise Edition Trial License

Anyone can request a trial license of <u>dotCMS Enterprise Edition.</u> This can be for your local PC or a server in your infrastructure. There are no additional terms and conditions, and the license is granted for a limited amount of time that gives your technology team enough time to do a proper technical evaluation of dotCMS.

You will have access to all product capabilities that we have then come with the latest release.

We want you to have the best product experience.

Learn how to request your trial license >>





02. dotCMS Cloud Sandbox

If you like to avoid the effort to do the installation on your own infrastructure, dotCMS can set-up a sandbox environment with our starter project for you. You will have access to all product capabilities that we have then come with the latest release. We want you to have the best product experience.

Explore the dotCMS Cloud Sandbox >>

03. Product Training

Getting to know a new product is exciting for both marketing and IT. Documentation websites are great, but online training for all key stakeholders of the CMS is obviously better. dotCMS offers a variety of training modules for each role. We offer training online and free of charge. We typically provide all the training modules for the current and previous major release.

dotCMS Free Product Training Courses >>

04. Guided Proof-of-Concept

A key success factor dotCMS sees with enterprises selecting our solution is what we call a guided Proof-of-Concept (PoC). This is a particularly elegant scenario for organizations with an in-house development/enterprise architecture team who want to explore the support of their most important use cases.

The guided PoC usually takes two to four weeks and starts with a kick-off with your team and dotCMS product engineers, where we will discuss and evaluate the use cases you want to test during the PoC so we can give you immediate pointers with regards to approaching with the standard product. We also set up a means of agile communications (Slack or similar) which allows your evaluation team to drop us quick questions we can respond to.

Set up a Guided POC Now >>



In short, any content-driven application, regardless of device type or user access can be built with dotCMS. Being the content foundation of your digital experience platform, **dotCMS offers a variety of use cases and scenarios you can support with our product.** In the table below, there is an overview of the applications our customers have built with dotCMS.



Open Access Applications

List of Applications	Devices
Websites	Any, including IoT devices
Mobile Apps	Any, including IoT devices
Single Page Apps	Any, including IoT devices
Multi Page Apps	Any, including IoT devices
Progressive Web Apps	Any, including IoT devices
Micro-Sites	Any, including IoT devices
Landing Pages	Any, including IoT devices
Knowledge Base	Any, including IoT devices

<u>Authenticated</u> Access Applications

List of Applications	Devices
Intranet	Any, including IoT devices
Extranet	Any, including IoT devices
B2C portal	Any, including IoT devices
B2B portal	Any, including IoT devices
Community portal	Any, including IoT devices



Appendix 1: Pre-configured Building Blocks dotCMS

dotCMS comes with a number of preconfigured building blocks that can be used and modified to your liking. They will give the team a leg up when starting to use dotCMS as the content foundation of your digital experience platform. The subactions can be extended by your IT team using OSGi plugin.

NoCode Workflow Sub-actions

For the Marketing Team

- Archive Content •
- **Copy Contentlet**
- Comment on Workflow
- Delete Content
- 'Four Eyes' Approval
- Link Checker
- Lock Content
- Message
- Notify Assignee
- Notify Users

- **Publish Content**
- Push Now
- Push Publish
- Reindex Content
- **Require Multiple Approvers**
- Reset Workflow
- Save Content
- Save Draft Content
- Send Email
- Set Value

- **Twitter Status Update** •
- Unarchive Content
- Unlock Content
- **Unpublish Content** Translate Content

Low NoCode Workflow Sub-actions

For the IT Team

Custom Code •



Appendix 2: Modules & Widgets in dotCMS

01. Events Module

Event listing, geo-searching "events near me", event registration, sharing, and social tools.

02. Blogs Module

Create custom blog lists and filters based on related blogs, categories or tags, and Likes (up and down), follows and multidepth commenting.

03. Forms Module

Create custom API forms with integration for the most common CRM and Marketing Automation products on the market.

04. Social Workflow Subaction

Add workflow sub-actions to automatically post to social networks like Facebook, Twitter, and LinkedIn when content is published.

05. YouTube & Vimeo (video search)

Browse YouTube and Vimeo and automatically create embed videos into your pages or applications.

06. Banners Module

Create reusable templates that allow content authors to easily build banners and promotions while ensuring brand consistency.

07. List Module

Easily build dynamic content lists of events, blogs, news or any content type you want. Use tags and categories to allow personalized content lists based on personas, geolocation or tags.



Complimentary Evaluation Support

dotCMS offers a variety of tactics to test-drive and proof out your key use-cases around your personalization strategy. It is our investment and helps you to evaluate dotCMS effectively, way beyond shiny product demos and slick sales presentation.

More on our evaluation support **Here>>>**



1,2,3 Programmable Web: https://www.programmableweb.com/news/cope-create-once-publish everywhere/2009/10/13

About dotCMS

dotCMS is a leading, open source content and customer experience management platform for companies that want innovation and performance driving their websites and other contentdriven applications. Extensible and massively scalable, both small and large organizations can rapidly deliver personalized and engaging content across browsers, mobile devices, channels, second screens and endpoints -- all from a single system. Founded in 2003, dotCMS is a privately owned US company with offices in Miami, Florida; Boston, Massachusetts and San Jose, Costa Rica. With a global network of certified development partners and an active open source community, dotCMS has generated more than a halfmillion downloads and thousands of implementations and integration projects worldwide. **Notable dotCMS customers include:** Telus, Standard & Poors, Hospital Corporation of America, Royal Bank of Canada, DirecTV, Thomson Reuters, China Mobile, Aon, and DriveTest Ontario. Miami 3059 Grand Av. Miami,FL,33133 U.S.A

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