

# **How-to – Sorting Hat – Multi-functional Flow**

V1.0 - Global Marketing Technology-AEM

**Component Name: Multi-functional Flow**

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**Author:** Christopher Restino

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# 1 Document History

The following important changes have been made to this document:

Date	Version #	Description of Changes Made	Author	Approved By
October 10 - 2019	1.0	Initial Draft	Christopher Restino	

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## 2 Introduction

This document provides “How to Instructions” for the component “Multi-functional Flow on the Anticipatory Pathing Tool (Sorting Hat)”. This component is intended to be used in all Evolution pages, including:

- Home page
- Solution Category page
- Solution Detail page

### 2.1 Short Description

This is intended to path users to the correct destination, or complete certain tasks in line. This is a Drag and Drop component available in the AEM Side-kick. This component includes Tile screen and Detail screen and provides flexibility to skip one of the screens within the Multi-functional flow

### Feature Overview

#### Sorting Hat Menu Item Config

- Title – option to include a Title
- Icon – option to include icon
- Second page Headline – option to include Headline
- Configuration Type – Author can choose either Title screen/Detail screen
- Detail Screen – Author can include PDF links and content on the Left and Right sections – the screen can be used to display information on Forms along with links to Download corresponding forms
- Tile Screen Config – Tile screen provides the Author flexibility to include CTA, or other Detail/Tile screens within
  - Tile Title – Option to include Title
  - Configuration Type – Provides Author the flexibility to include CTA links or another Tile screen or Detail screen depending on the need
  - Tile Screen Options – Option to include CTA and Show More labels to expand/collapse

## 2.2 AEM Component Data Model

Tab	Field Name	Field Group	Field Type	Validation	Accepted values
Configuration	Sorting Hat Menu Item - Config				
	Title	Configuration	Text Field	Mandatory Max Char. 45	Alpha Numeric
	Icon	Configuration	Drop Down	Mandatory	List of Tile Icons
	Second Page Headline	Configuration	Text Area	Mandatory Max Char. 50	Alpha Numeric
	Configuration Type	Configuration	Drop Down	Optional	Tile Screen/Detail Screen
	PDF Link	Configuration	Path Field	Optional	Valid PDF Path from DAM
	Left Content	Configuration	RTE	Optional	Alpha Numeric HTML
	Right Content	Configuration	RTE	Optional Max Char. 300	Alpha Numeric HTML
	Tile Configuration	Configuration	Multifield Panel	Optional	Adds new Tile configuration
	Tile Title	Configuration	Text Field	Mandatory Max Char. 45	Alpha Numeric
	Configuration Type	Configuration	Drop Down	Optional	CTA Link/Tile Screen/Detail Screen
	Headline Copy	Configuration	Text Area	Optional Max Char. 50	Alphanumeric
	CTA Link	Configuration	Path Field	Optional	Valid Page path/URL
	CTA Link Open In	Configuration	Drop Down	Optional	Same Page/ New Page
	Tile Screen Config	Configuration	Multifield Panel	Optional	Creates a nested tile screen configuration
	Tile Title	Configuration	Text Field	Mandatory Max Char. 45	Alpha Numeric
	Configuration Type	Configuration	Drop Down	Optional	CTA Link/Tile Screen/Detail Screen
	Headline Copy	Configuration	Text Area	Optional Max Char. 50	Alphanumeric
	CTA Link	Configuration	Path Field	Optional	Valid Page path/URL
	CTA Link Open In	Configuration	Drop Down	Optional	Same Page/ New Page
	Tile Screen Config	Configuration	Multi Field Panel	Optional	Third Level tile screen configuration
	Tile Title	Configuration	Text Field	Mandatory Max Char. 45	Alpha Numeric
	Configuration Type	Configuration	Drop Down	Optional	CTA Link/Tile Screen/Detail Screen
	Headline Copy	Configuration	Text Area	Optional Max Char. 50	Alphanumeric

Tab	Field Name	Field Group	Field Type	Validation	Accepted values
	CTA Link	Configuration	Path Field	Optional	Valid Page path/URL
	CTA Link Open In	Configuration	Drop Down	Optional	Same Page/ New Page
	Tile Screen Config	Configuration	Multi Field Panel	Optional	Fourth level tile screen configuration
	Tile Title	Configuration	Text Field	Mandatory Max Char. 45	Alpha Numeric
	Configuration Type	Configuration	Drop Down	Optional	CTA Link/Detail Screen
	Headline Copy	Configuration	Text Area	Optional Max Char. 50	Alphanumeric
	CTA Link	Configuration	Path Field	Optional	Valid Page path/URL
	CTA Link Open In	Configuration	Drop Down	Optional	Same Page/ New Page
	PDF Link	Configuration	Path Field	Optional	Valid PDF Path from DAM
	Left Content	Configuration	RTE	Optional	Alpha Numeric HTML
	Right Content	Configuration	RTE	Optional Max Char. 300	Alpha Numeric HTML
	PDF Link	Configuration	Path Field	Optional	Valid PDF Path from DAM
	Left Content	Configuration	RTE	Optional	Alpha Numeric HTML
	Right Content	Configuration	RTE	Optional Max Char. 300	Alpha Numeric HTML
	Show More Label	Configuration	Text Field	Optional	Alpha Numeric
	Optional Information Text	Configuration	Text Area	Optional Max Char. 100	Alpha Numeric
	Optional CTA Text	Configuration	Text Field	Optional Max Char. 45	Alpha Numeric
	Optional CTA URL	Configuration	Path Field	Optional	Valid Page path/URL
	Optional CTA Open In	Configuration	Drop Down	Optional	Same Page/ New Page
	PDF Link	Configuration	Path Field	Optional	Valid PDF Path from DAM
	Left Content	Configuration	RTE	Optional	Alpha Numeric HTML
	Right Content	Configuration	RTE	Optional Max Char. 300	Alpha Numeric HTML
	Show More Label	Configuration	Text Field	Optional	Alpha Numeric
	Optional Information Text	Configuration	Text Area	Optional Max Char. 100	Alpha Numeric
	Optional CTA Text	Configuration	Text Field	Optional Max Char. 45	Alpha Numeric
	Optional CTA URL	Configuration	Path Field	Optional	Valid Page path/URL
	Optional CTA Open In	Configuration	Drop Down	Optional	Same Page/ New Page
	Optional Information Text	Configuration	Text Area	Optional Max Char. 100	Alpha Numeric
	Optional CTA Text	Configuration	Text Field	Optional	Alpha Numeric

Tab	Field Name	Field Group	Field Type	Validation	Accepted values
				Max Char. 45	
	Optional CTA URL	Configuration	Path Field	Optional	Valid Page path/URL
	Optional CTA Open In	Configuration	Drop Down	Optional	Same Page/ New Page
	Show More Label	Configuration	Text Field	Optional	Alpha Numeric
	PDF Link	Configuration	Path Field	Optional	Valid PDF Path from DAM
	Left Content	Configuration	RTE	Optional	Alpha Numeric HTML
	Right Content	Configuration	RTE	Optional Max Char. 300	Alpha Numeric HTML
Tile Screen Options					
	Optional Information Text	Configuration	Text Area	Optional Max Char. 100	Alpha Numeric
	Optional CTA Text	Configuration	Text Field	Optional Max Char. 45	Alpha Numeric
	Optional CTA URL	Configuration	Path Field	Optional	Valid Page path/URL
	Optional CTA Open In	Configuration	Drop Down	Optional	Same Page/ New Page
	Show More Label	Configuration	Text Field	Optional	Alpha Numeric

## 2.3 Intended Audience

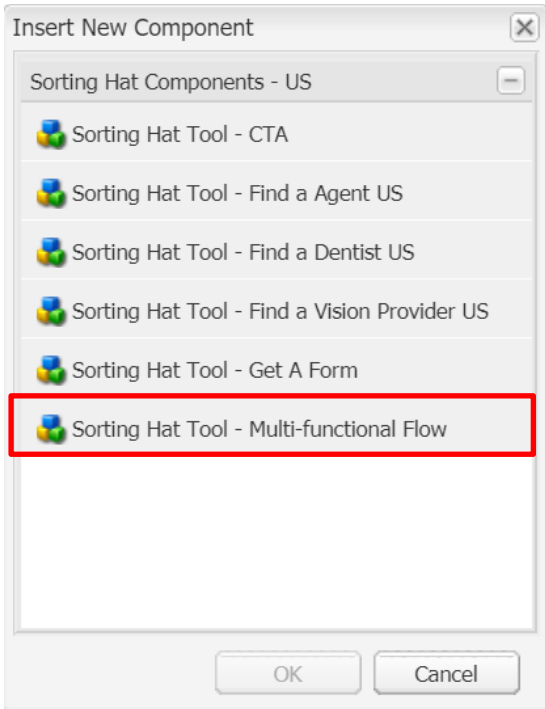
The primary audience of this design is:

- Content Authors
- Agencies
- Marketers

### 3 How to Enable/Turn-On the Component

This component/feature is available in the sidekick and can be dragged onto only the parsys configured in the Sorting Hat container Component

- From Sidekick, select market specific sorting hat component group then "Sorting Hat Tool – Multi-functional Flow"





## 4 Component Dialog

Right click and press edit or double click the component to open the dialog.

### Configuration Tab

This tab contains the overall component configurations

1. Title – Text that shows up on the tile in the sorting hat container
2. Icon – Icon that shows up on the tile in the sorting hat container
3. Second Page Headline - Text on the left side of the sorting hat container changes to this when the second page overlay is shown
4. Configuration Type – user can select either a Tile Screen configuration or a Detail Landing screen.
5. PDF Link – if user selects Detail Screen this allows user to select a PDF from the DAM.
6. Left Content – if user selects Detail Screen this RTE content will show on the left portion of the screen in desktop, top in mobile
7. Right Content - if user selects Detail Screen this RTE content will show on the right portion of the screen in Desktop bottom in mobile
8. Tile Configuration – if user select Tile Screen this configuration will show allowing user to add multiple tiles with their own configurations
  - a. Tile Title – Text that displays on the tile
  - b. Configuration Type – User can select either CTA, Tile Screen, or Detail Landing for the second level of configuration
  - c. Headline Copy - Text on the left side of the sorting hat container changes to this when the third overlay screen changes.
  - d. CTA Link – If user selects CTA from configuration type this is the URL that the tile will redirect to.
  - e. CTA Open In – if user selects CTA from configuration type this is the target attribute of the link either open in a new page or the same page.
  - f. Tile Screen Config – If user selects Tile Screen this configuration will show allowing users to add multiple tiles with their own configuration
    - i. Tile Title – Text that displays on the tile
    - ii. Configuration Type – User can select either CTA, Tile Screen, or Detail Landing for the third level of configuration
    - iii. Headline Copy - Text on the left side of the sorting hat container changes to this when the third overlay screen changes.
    - iv. CTA Link – If user selects CTA from configuration type this is the URL that the tile will redirect to.
    - v. CTA Open In – if user selects CTA from configuration type this is the target attribute of the link either open in a new page or the same page.
    - vi. Tile Screen Config - If user selects Tile Screen this configuration will show allowing users to add multiple tiles with their own configuration
      1. Tile Title – Text that displays on the tile
      2. Configuration Type – User can select either CTA, Tile Screen, or Detail Landing for the fourth level of configuration
      3. Headline Copy - Text on the left side of the sorting hat container changes to this when the third overlay screen changes.
      4. CTA Link – If user selects CTA from configuration type this is the URL that the tile will redirect to.
      5. CTA Open In – if user selects CTA from configuration type this is the target attribute of the link either open in a new page or the same page.
      6. Tile Screen Config - - If user selects Tile Screen this configuration will show allowing users to add multiple tiles with their own configuration.
        - a. Tile Title – Text that displays on the tile
        - b. Configuration Type – User can select either CTA or Detail Landing for the last level of configuration
        - c. Headline Copy - Text on the left side of the sorting hat container changes to this when the third overlay screen changes.
        - d. CTA Link – If user selects CTA from configuration type this is the URL that the tile will redirect to.
        - e. CTA Open In – if user selects CTA from configuration type this is the target attribute of the link either open in a new page or the same page.
        - f. PDF Link – if user selects Detail Screen this allows user to select a PDF from the DAM.
        - g. Left Content – if user selects Detail Screen this RTE content will show on the left portion of the screen in desktop, top in mobile
        - h. Right Content - if user selects Detail Screen this RTE content will show on the right portion of the screen in Desktop bottom in mobile
      7. PDF Link – if user selects Detail Screen this allows user to select a PDF from the DAM.

8. Left Content – if user selects Detail Screen this RTE content will show on the left portion of the screen in desktop, top in mobile
9. Right Content - if user selects Detail Screen this RTE content will show on the right portion of the screen in Desktop bottom in mobile
10. Show More Label – If user selects Tile Screen this label will show if 6+ tiles are show and will allow user to view more than 6 tiles
11. Optional Information Text – If user selects Tile Screen this optional text is shown to the user.
12. Optional CTA Text - If user selects Tile Screen this optional CTA can be shown this is the text for the link
13. Optional CTA URL - If user selects Tile Screen this optional CTA can be shown this is the path for the link
14. Optional CTA Open In - If user selects Tile Screen this optional CTA can be shown this is the target attribute either can open in a new page or the same page
- vii. PDF Link – if user selects Detail Screen this allows user to select a PDF from the DAM.
- viii. Left Content – if user selects Detail Screen this RTE content will show on the left portion of the screen in desktop, top in mobile
- ix. Right Content - if user selects Detail Screen this RTE content will show on the right portion of the screen in Desktop bottom in mobile
- x. Show More Label – If user selects Tile Screen this label will show if 6+ tiles are show and will allow user to view more than 6 tiles
- xi. Optional Information Text – If user selects Tile Screen this optional text is shown to the user.
- xii. Optional CTA Text - If user selects Tile Screen this optional CTA can be shown this is the text for the link
- xiii. Optional CTA URL - If user selects Tile Screen this optional CTA can be shown this is the path for the link
- xiv. Optional CTA Open In - If user selects Tile Screen this optional CTA can be shown this is the target attribute either can open in a new page or the same page
- g. Optional Information Text – If user selects Tile Screen this optional text is shown to the user.
- h. Optional CTA Text - If user selects Tile Screen this optional CTA can be shown this is the text for the link
- i. Optional CTA URL - If user selects Tile Screen this optional CTA can be shown this is the path for the link
- j. Optional CTA Open In - If user selects Tile Screen this optional CTA can be shown this is the target attribute either can open in a new page or the same page
- k. Show More Label – If user selects Tile Screen this label will show if 6+ tiles are show and will allow user to view more than 6 tiles
- l. PDF Link – if user selects Detail Screen this allows user to select a PDF from the DAM.
- m. Left Content – if user selects Detail Screen this RTE content will show on the left portion of the screen in desktop, top in mobile
- n. Right Content - if user selects Detail Screen this RTE content will show on the right portion of the screen in Desktop bottom in mobile
9. Optional Information Text – If user selects Tile Screen this optional text is shown to the user.
10. Optional CTA Text - If user selects Tile Screen this optional CTA can be shown this is the text for the link
11. Optional CTA URL - If user selects Tile Screen this optional CTA can be shown this is the path for the link
12. Optional CTA Open In - If user selects Tile Screen this optional CTA can be shown this is the target attribute either can open in a new page or the same page
13. Show More Label – If user selects Tile Screen this label will show if 6+ tiles are show and will allow user to view more than 6 tiles

# Tile Screen Configuration

Multi Functional Flow

**Configuration**

Sorting Hat Menu Item - Config

Title\*

Icon\*   
Please choose an icon from the dropdown

Second Page Headline\*

Configuration Type   
Choose Option you want for the tile.

Tile Screen Config  [Add tile](#)

Click the '+' to add a tile

Tile Screen Options

Optional Information Text

Optional Information CTA Text

Optional Information CTA URL

Optional Information CTA Open In

Show More Label

OK Cancel

I want information for...

Myself &/ or My Family B Brokers A

Multi Functional Flow

Configuration

Linking Hot Menu Item - Config

Title\* Brokers A

Icon\* Account / Single Person B

Please choose an icon from the dropdown

Second Page Headline\* Help clients keep their employees engaged

Configuration Type Tile Screen

Choose option you want for the tile

Tile Screen Config

Tile Configuration

Title\* Why Mutual? A

Configuration Type CTA Link B

Choose the config you want for the tile

CTA Link /business-and-brokers/broker-resources/why-mutual/ A

CTA Link Open In Same Page B

Title\* Financial Wellness A

Configuration Type CTA Link B

Choose the config you want for the tile

CTA Link /voluntary-benefits/financial-wellness/ A

CTA Link Open In Same Page B

Title\* TSD A

Configuration Type CTA Link B

Choose the config you want for the tile

CTA Link / A

CTA Link Open In Same Page B

Title\* Login to MultiLink A

Configuration Type CTA Link B

Choose the config you want for the tile

CTA Link https://online.metlife.com/ A

CTA Link Open In New Page B

Click the "+" to add a tile

Tile Screen Options

Optional Information Text Help your clients choose the right benefits

Optional Information CTA Text Read our 2019 Benefit Trends Study

Optional Information CTA Link /amp/kyse-benefit-trends/kyse-benefits-in-new-work-world-2019/ A

Optional Information CTA Open In Same Page B

Show More Label Show more A

OK Cancel

# A Help clients keep their employees engaged

The screenshot shows a configuration tool interface with several sections:

- Configuration:** Includes fields for 'Help?' and 'Account / Single Person'.
- Second Page Header:** A section with a heading 'Help clients keep their employees engaged' (callout A).
- Configuration Type:** A dropdown menu set to 'The Screen' (callout B).
- The Screen Config:** A list of configurations for different topics:
  - Why MetLife:** Configuration Type: 'Why MetLife', CTA Link: 'Features and benefits/Why metlife', CTA Link Open In: 'New Page' (callout C).
  - Financial Wellness:** Configuration Type: 'Financial Wellness', CTA Link: 'Features and benefits/Financial wellness', CTA Link Open In: 'New Page' (callout D).
  - HR:** Configuration Type: 'HR', CTA Link: 'Helps/HR metlife.com', CTA Link Open In: 'New Page' (callout E).
  - Login to MetLife:** Configuration Type: 'Login to MetLife', CTA Link: 'Helps/HR metlife.com', CTA Link Open In: 'New Page' (callout F).
- Optional Information:** A section with a heading 'Help your clients choose the right benefits' (callout D).
- Optional Information:** A section with a heading 'Read our 2019 Benefit Trends Study' (callout E).
- Optional Information:** A section with a heading 'Read our 2019 Benefit Trends Study' (callout F).

Why MetLife? C

Financial Wellness

TBD

Resources and Tools

Employee Benefits

Login to MetLink

Show more + F

Help your clients choose the right benefits D  
 Read our 2019 Benefit Trends Study E

# Landing Page Configuration

Multi Functional Flow

**Configuration**

Sorting Hat Menu Item - Config

Title\*

Icon\*  Please choose an icon from the dropdown

Second Page Headline\*

Configuration Type  Choose Option you want for the tile.

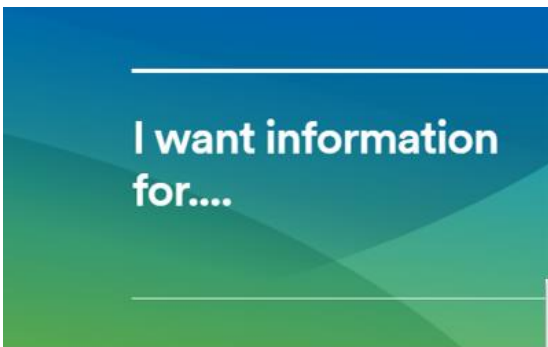
PDF Link

Left Content

Right Content

300 max character count.

OK Cancel



Myself &/ or My Family

Brokers

My Employees

Detail Screen

Multi Functional Flow

**Configuration**

Sorting Hat Menu Item - Config

Title\*  A

Icon\*  B Please choose an icon from the dropdown

Second Page Headline\*

Configuration Type  Choose Option you want for the tile.

PDF Link

Left Content 

Test Left Content

Right Content 

Test Right Content

300 max character count.

OK Cancel



# Detail Screen Headline Overlay

A

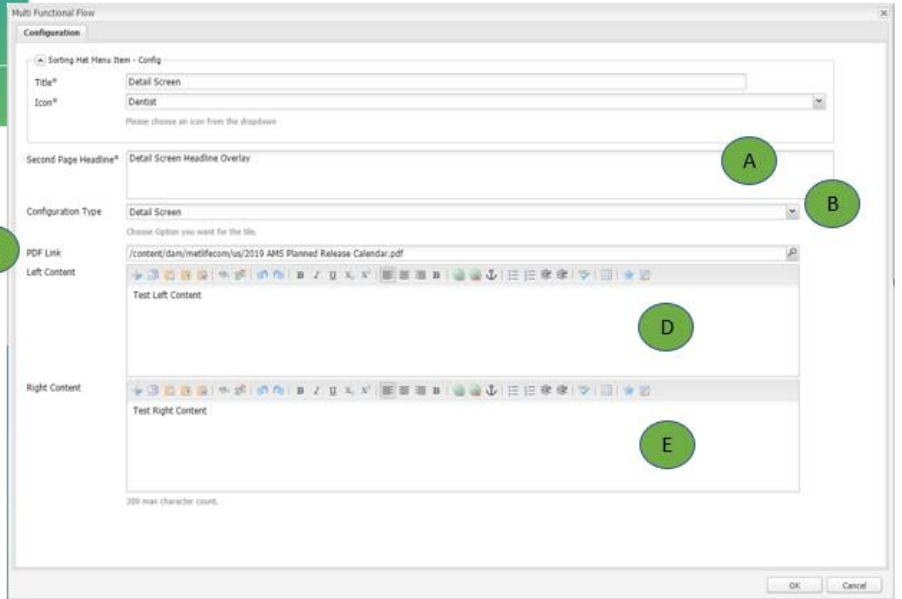


C 2019 AMS Planned Release Calendar (PDF 141 KB)

D Test Left Content

E Test Right Content

B



Configuration  
Sorting HMT Menu Item - Config  
Title\* Detail Screen  
Icon\* Dentist  
Please choose an icon from the dropdown

Second Page Headline\* Detail Screen Headline Overlay

Configuration Type Detail Screen

Choose Option you want for the title.

PDF Link /content/dam/metlifecon/us/2019 AMS Planned Release Calendar.pdf

Left Content  
Test Left Content

Right Content  
Test Right Content

300 max character count.

OK Cancel