



HDX-BU-200

Personalization Lab

HCLSoftware U

Creating a new generation of experts

Edition : April 2024

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Author(s)

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Company: HCL

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Introduction

This hands-on lab gets you started on the HCL Digital Experience (DX) platform and its personalization capabilities. You will see how personalization helps you target content based on users and time of day.

In this DX back-office user lab, you will act in the role of Albert and Rose, who are going to team up to prepare several changes to the website of the fictitious Woodburn Stores company.



Albert Dora, Marketing Manager in San Francisco (USA)

Albert is a marketing manager with a site manager role, who will create the personalization segment to be used by Rose in two different ways, as a Segment Group and as a Profiler rule in Personalization.



Rose Bozli, Marketing Manager, based in Tokyo (Japan)

Rose, a Marketing Rep, will update the home page with a new section showing whether the store is opened or closed using the segment created by Albert.

Prerequisites

1. Completion of [HDX-INTRO](#) and [HDX-BU-100](#) courses, including the labs (specially the one on Woodburn Stores), as this gives you a good basis on using DX and the Woodburn Stores site
2. A DX server with DX Solution Modules <https://hclsofy.com/catalog/dx-solution-modules> deployed of HCL SoFy, as this gives you access to the Woodburn Stores site and other Personalization rules
3. Access to download the Lab Resources:
In the same place where you have found this lab, you will find corresponding resources which you may download and unzip on your Desktop. This will help you run the lab more easily. You may later replace them with your own.

You will be using the following user IDs and passwords:

Purpose	User	Password
SoFy Login	Your official email id	Your password
SoFy Solution Console Login	sol-admin	<from SoFy solution>
DX Login Albert (Author)	adora	HCL-Dem0
DX Login Rose (Author)	rbozli	HCL-Dem0

Lab Overview

In this lab, you will explore Personalization from the role of Albert and Rose. They have been tasked to create a new spot on the home page that displays “We are open” during open hours and “We are closed” during off hours.

Part 1: Create a new Store Hours Web Content Segment Group

Woodburn Stores has both an online and physical presence. They want to advertise their physical store hours and redirect users to their online shopping during off hours. As Albert, the Marketing Manager with site manager rights, you will create a segment group in Web Content, called Store Hours with two segments, Open and Closed.

Libraries > Woodburn Stores Content > Segments > Store Hours

Part 2: Add personalized content to the Woodburn Stores home page

As Rose, you will use the new Open Hours segment group to update the home page with “We are Open” content item during open hours and a “We are Closed” content item during off hours.

We are open!

Come and visit us now!

Our opening hours are 8am–6pm, 7 days a week!

Our closest shop is only 5 minutes away! Click below for directions!

GET DIRECTIONS

FEEDBACK

Part 3: Optional Part 3: Create the Store Hours Profiler Rule using Personalization

You may also use Personalization to create these and more advanced rules. As Albert, you will recreate the Store Hours rule, as a profiler rule, under a dedicated Office folder.

Personalization Navigator

EJPVP62011: A new item has been created: "Office/Store Hours".

+ New Import Delete Extra Actions Select View:

browsing workspace		Name	Type	Author
Workspace				
CommonRules				
Office	<input checked="" type="checkbox"/>	Store Hours	Profiler	Albert Dora
WoodburnBank				
WoodburnHealth				
WoodburnStores				
myWoodburn				

Hide explorer view (1 selected)

Part 1: Create a new Store Hours Web Content Segment Group

Woodburn Stores has both an online and physical presence. They want to advertise their physical store hours and redirect users to their online shopping during off hours. As Albert, the Marketing Manager with site manager rights, you will create a segment group in Web Content, called Store Hours with two segments, Open and Closed.

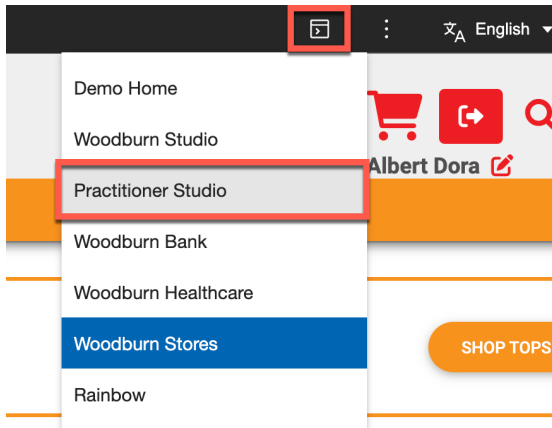
1. Go to the home page of Woodburn Stores first. On the server where the DX Solution Modules has been installed, next to **Woodburn Stores Home Page**, click **Open**. Simulator, to access your instance of the DX Solution Modules.

The screenshot shows the DX Solution Modules dashboard. On the left, under 'Sandbox Links', there is a list of links with 'Open' buttons. The 'Woodburn Stores Home Page' link and its corresponding 'Open' button are highlighted with a red rectangular box. Other links include 'Demo Home Page', 'Woodburn Healthcare Home Page', and 'Woodburn Studio Home Page'. The right side of the dashboard features a banner for 'HCL Digital Experience Business Solution Example' and a section titled 'HCL Digital Experience Modules' with descriptive text.

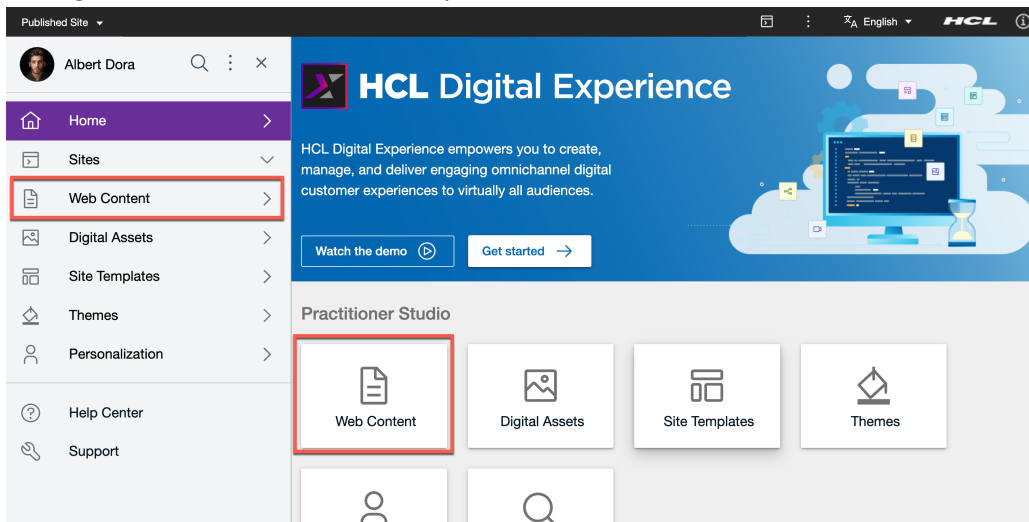
2. Then log in as Albert Dora. Then click **LOG-IN**, enter **User ID adora** and **Password HCL-Dem0** and click **LOG-IN**.

The screenshot displays the Woodburn Stores website with a login modal window open. The modal has a 'Login' title and a close button. It contains a 'REGISTER NOW' link and an 'ALREADY A MEMBER' link. The 'User ID' field is filled with 'adora' and the 'Password' field is filled with 'HCL-Dem0'. A red box highlights the 'SIGN IN' button. Below the button are links for 'Forgot User ID?' and 'Forgot Password?'. The background shows the website's navigation bar and promotional banners.

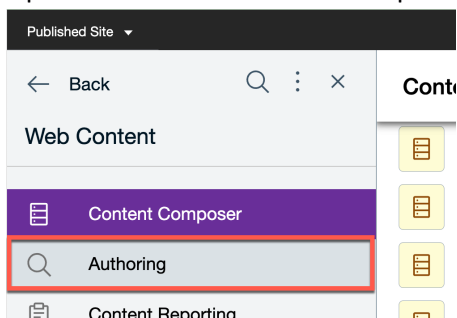
- Then open the Web Content Authoring to create your new segment group in the Woodburn Stores Content web content library. First open the site menu and switch to **Practitioner Studio**.



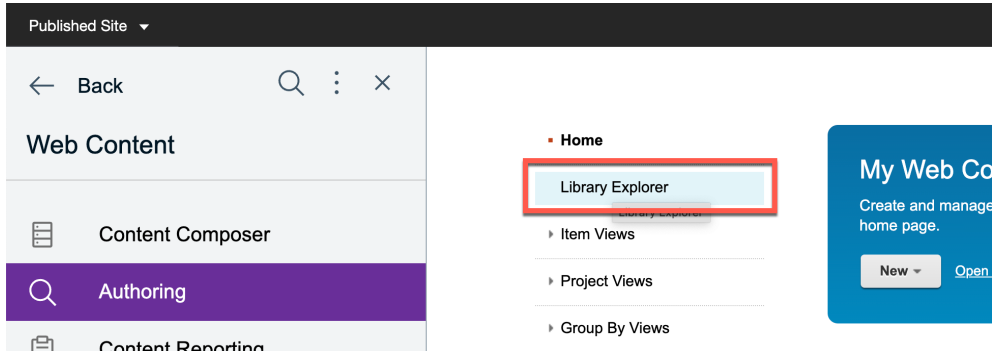
- Then go to Web Content. Click on any of the **Web Content** links.



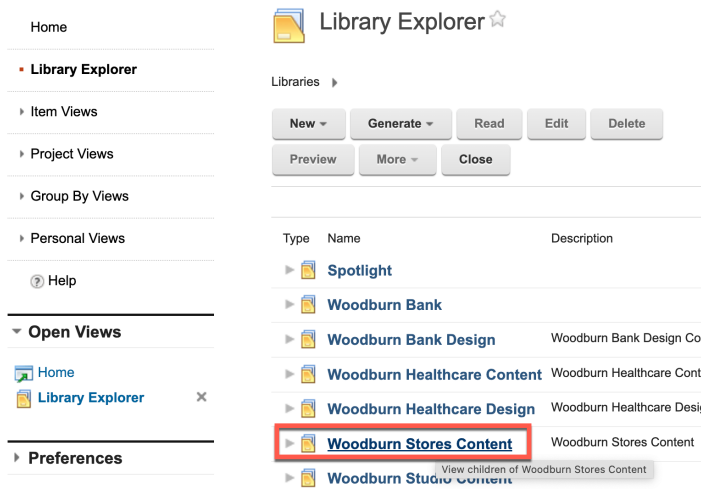
- Open the sidebar menu at the top left corner and select **Authoring**.



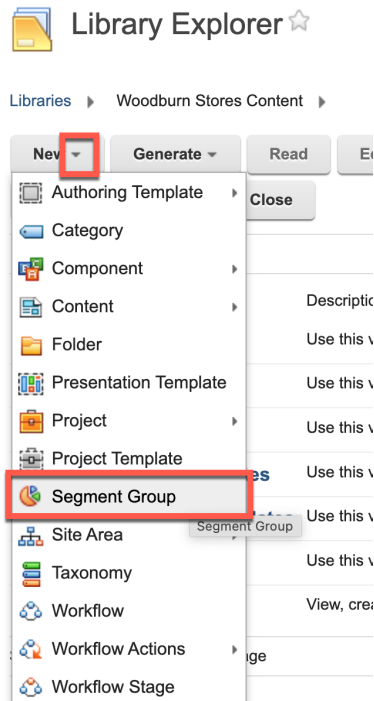
6. Then open the Library Explorer.



7. Select the **Woodburn Stores Content** library.



8. Create your new Store Hours segment group. Click **New** then **Segment Group**.



- Change the **Name** to **Store Hours**. Optionally, give it a description. Then click **Create** to define the new segment.

Untitled
Created by [Albert Dora](#)

Save and Close Add To Project... Add Workflow Close

Segment Group Properties

*Name:

Display title:

Description:

*Location: Select Location
Woodburn Stores Content

Segments

A segment group contains related segments that are used by marketers to target content to the appropriate audience. Create a segment to define the characteristics of your target audience.

[Learn More](#)

No segments defined. Click Create to create segments.

- Create the first segment open that is valid from 8:00 am and 6:00 pm. Name it **Open** and click **Submit**.

Create Segments Preview

Create one or more segments for your segment group. View an example to get started. [Learn More](#)

Segment when

attribute * is value *

add Condition

add Segment

Otherwise Segment

- You now need to set the start and end time. Click **attribute** and select **Date** then **Time**.

Create one or more segments for your segment group. View an example to get started. [Learn More](#)

Open when

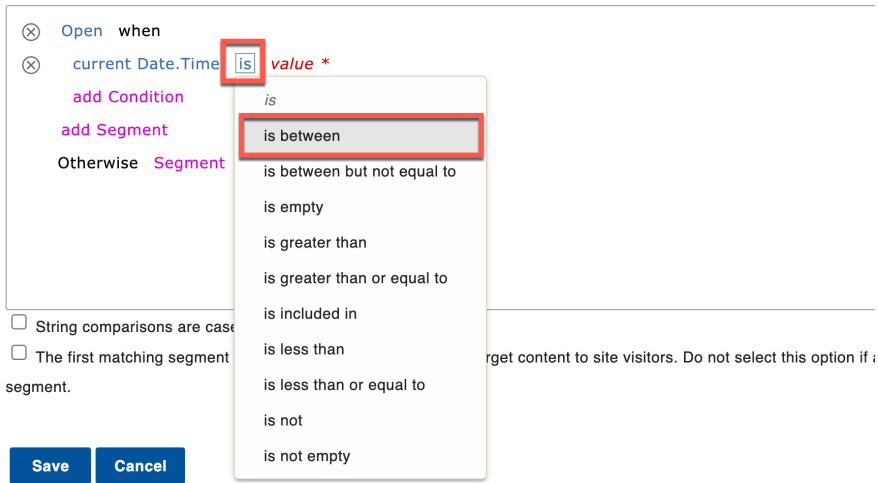
is

- Portal Users
- UnicaApplicationObject
- Web Content
- Browser Capability
- Date
- String
- The Device

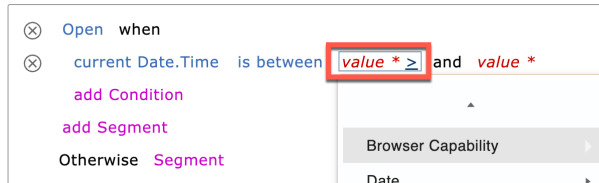
- Date
- Day
- Month
- Time
- Timestamp
- Weekday
- Year

Segment group is used to target content to site visitors. Do not select this option if a site visitor might m

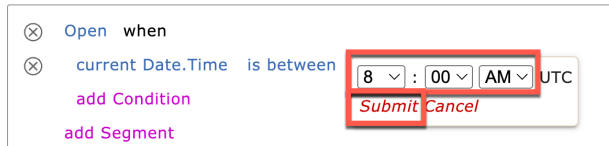
12. Change the default is to between, so it allows you to set the end time. Click **is** and change to **is between**.



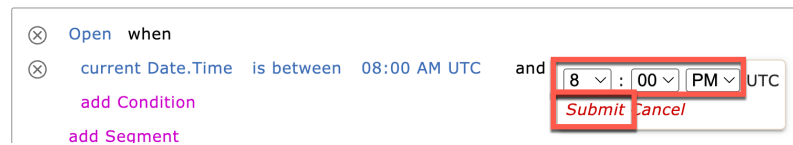
13. It should be open between 8 AM and 8 PM. Click **value**. Note, do not click the right chevron, that gives you another menu that gives you access to any attribute again.



14. Set the opening hour to 8 AM and click **Submit**.



15. And closing hour to 8 PM and click **Submit** again.

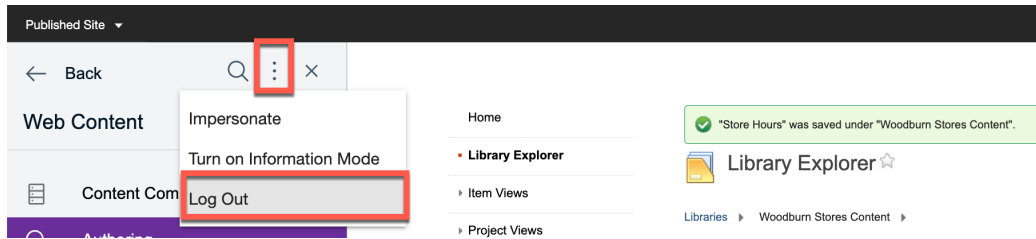


16. You could create another segment by clicking **add Segment** and repeating this process by creating another segment called Closed with the hours between 6:00 pm and 8:00 am. However, as when it is not open, it is closed, it is simpler to set it to otherwise. Click **Segment** next to Otherwise, enter **Closed** and click **Submit**. The rule now looks like this. Save it. Click **Save**.



17. You are returned to the Store Hours Segment Group. Save it now. Click **Save and Close**.

18. Then log out as Albert. Click the three vertical dots, then **Log Out**.

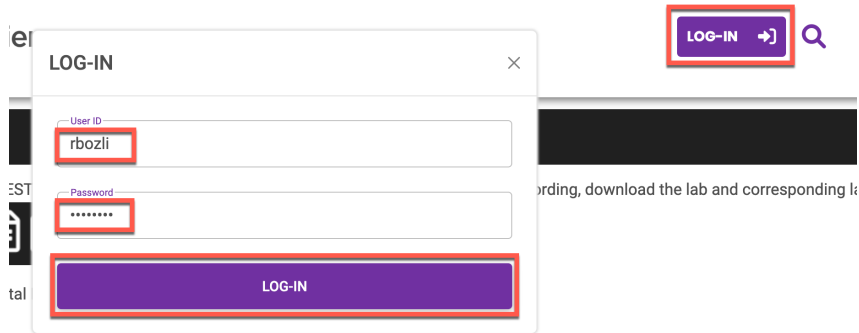


Congratulations! You've created a new Open Hours Segment Group that can be used to target a content item during open hours and another content item during closed hours.

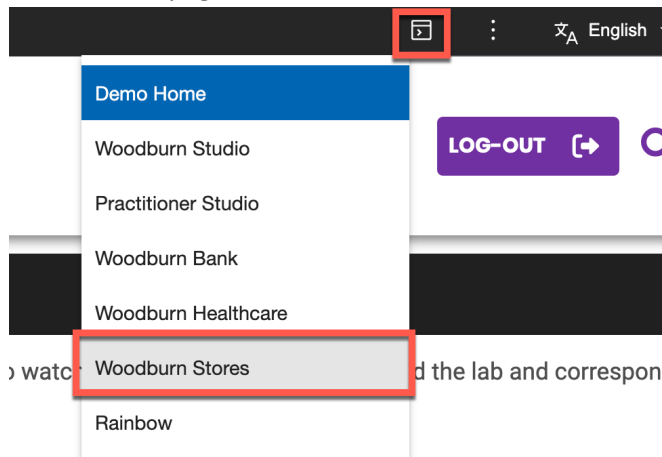
Part 2: Add personalized content to the Woodburn Stores home page

As Rose, you will use the new Open Hours segment group to update the home page with “We are Open” content item during open hours and a “We are Closed” content item during off hours.

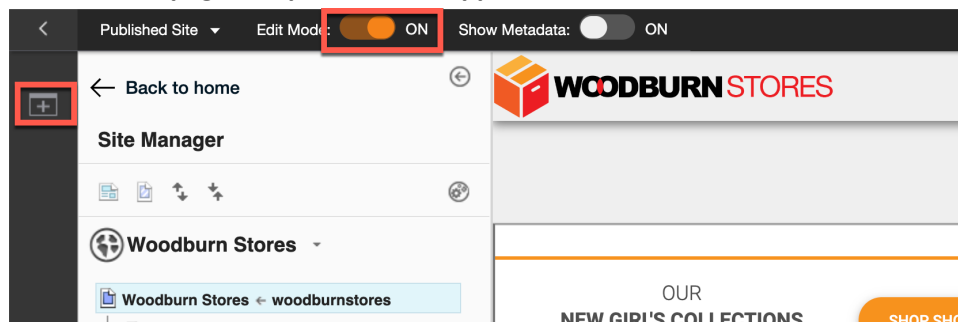
1. Now log in as Rose, a Marketing Rep with Content Author rights. Click **LOG-IN**, enter **User ID rbozli** and **Password HCL-Dem0** and click **LOG-IN**.



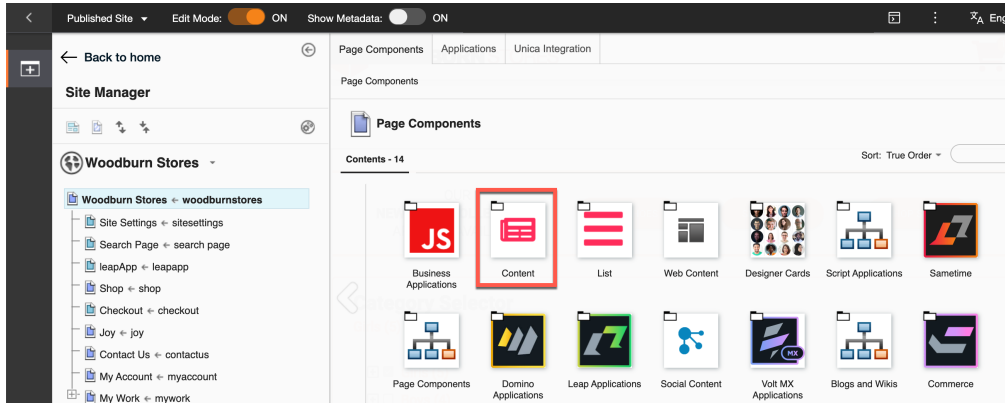
2. Then go to the Woodburn Stores site. Open the Site Menu and navigate to the **Woodburn Stores** home page.



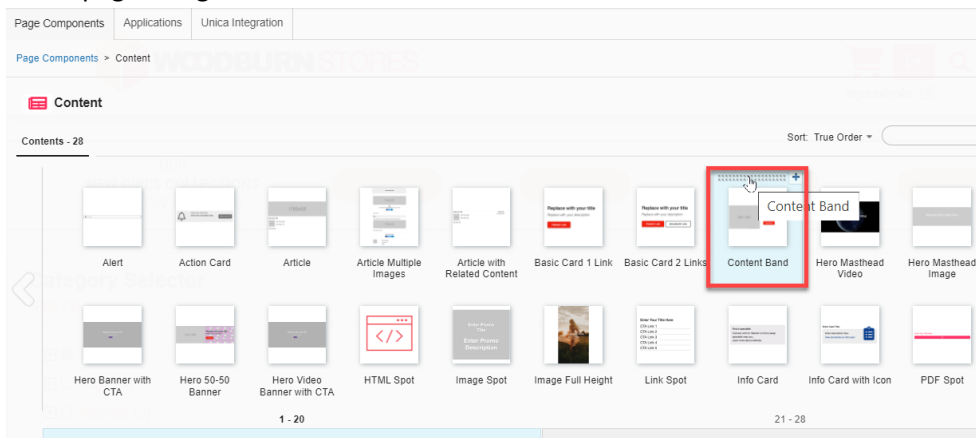
3. Place the page in edit mode to add a new Content Band content. Enable the **Edit Mode** and click the **Add page components and applications icon**.



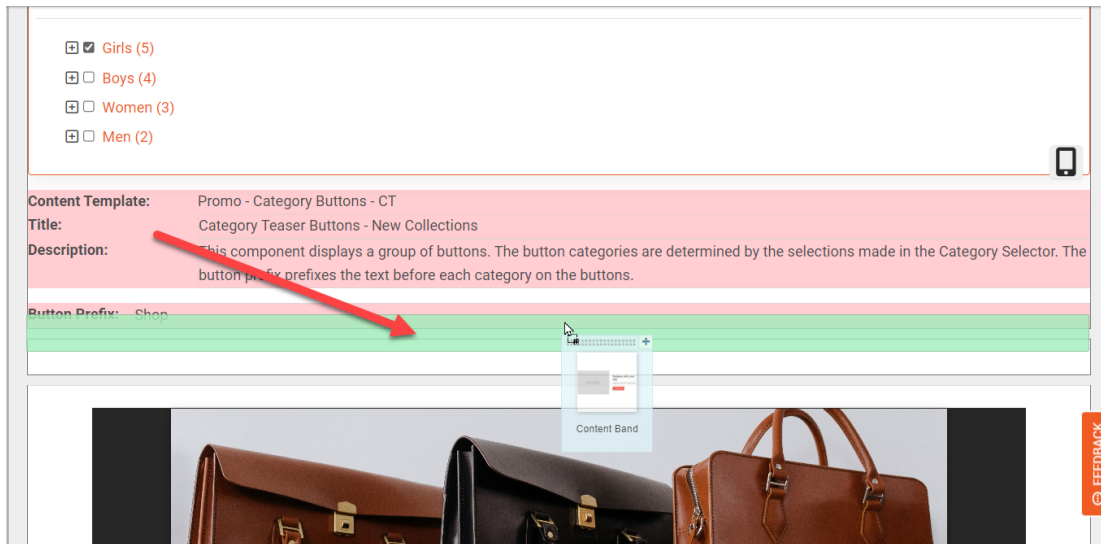
4. Then click the **Content** folder.



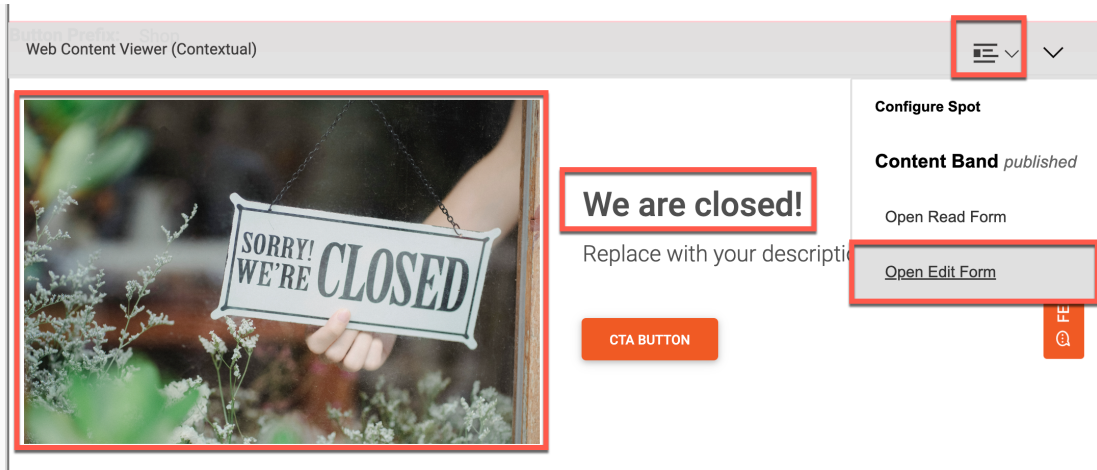
5. And drag & drop the Content Band page component under the first page component on the home page. Drag the **Content Band** down.



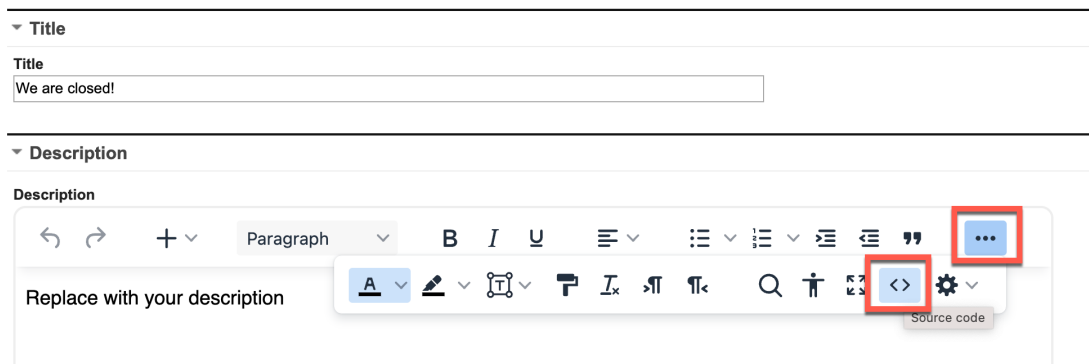
6. Then drop it below the **Category Teaser Buttons – New Collections** page component.



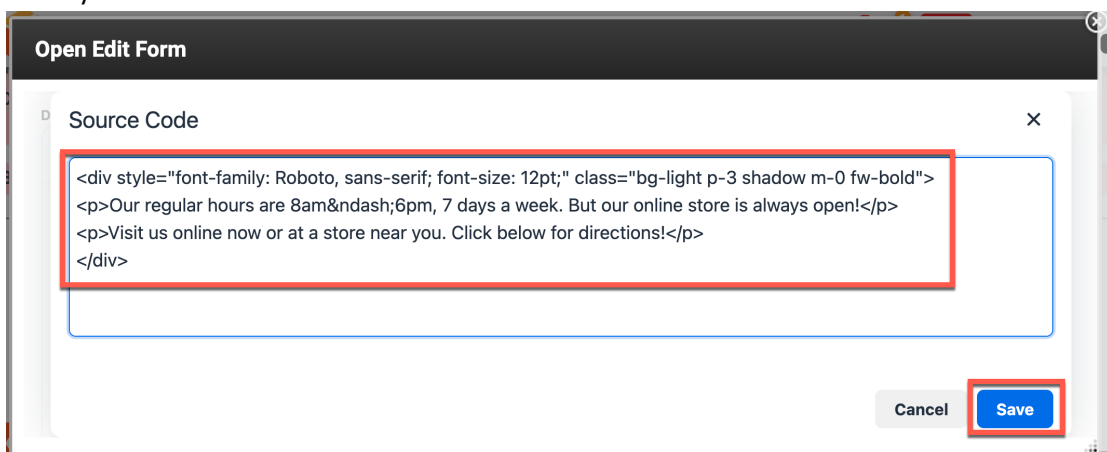
- Then replace the image and description text with that provided with the lab, or you may use your own. Change the **Title** to **We are closed!** If you want to use the text provided with the lab, you will notice it has HTML code. By default, the inplace rich editor is not configured to add this. However, you may add this using the inline editing where you can edit HTML source code. Open the display content menu and **Open Edit Form**.



- In the **Description** element, open the menu and select the **Source Code** icon.



- Paste your HTML code now and click **Save**.



10. Then scroll down to the **CTA Link** and change the **Link text** to **Get Directions**. You may update the URL as well.

▼ **CTA Link**

Link:
 External URL
 Web Content

Type a URL: [?](#)

Display link as:
 Text
 Image component

Link text:

Use URL as link text

11. And update the **title**, **display title** with **We are closed**, optionally the **description** with a text like **This informs the customer that we are closed now!** and click **Save and Close** to save.

Open Edit Form

Libraries > Woodburn Stores Content > Content > woodburnstores > Content Band

Content Band ☆
 Status - Published | Last modified Today 5:36:07 PM GMT by [Rose Bozli](#) | Created by [Rose Bozli](#)

Content Properties


***Name:**

Display title: [Localizations](#)

Description: [Localizations](#)

12. It now should look like below. Then configure this page component to show this content only during open hours. Click the **Content Menu** then **Configure Spot**.

Web Content Viewer (Contextual)



We are closed!

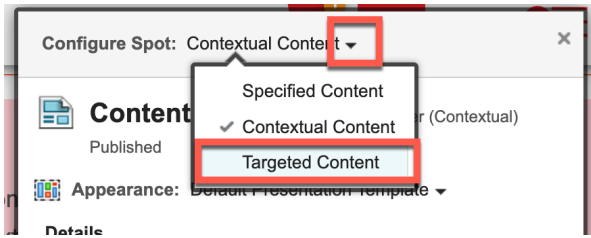
Our regular hours are 8am-6pm
 our online store is always open

Visit us online now or at a store
 below for directions!

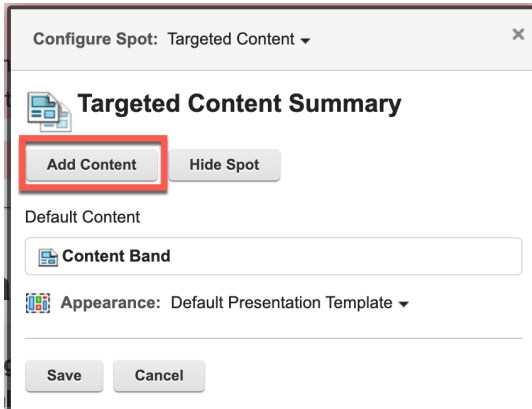
Configure Spot

Content Band *published*

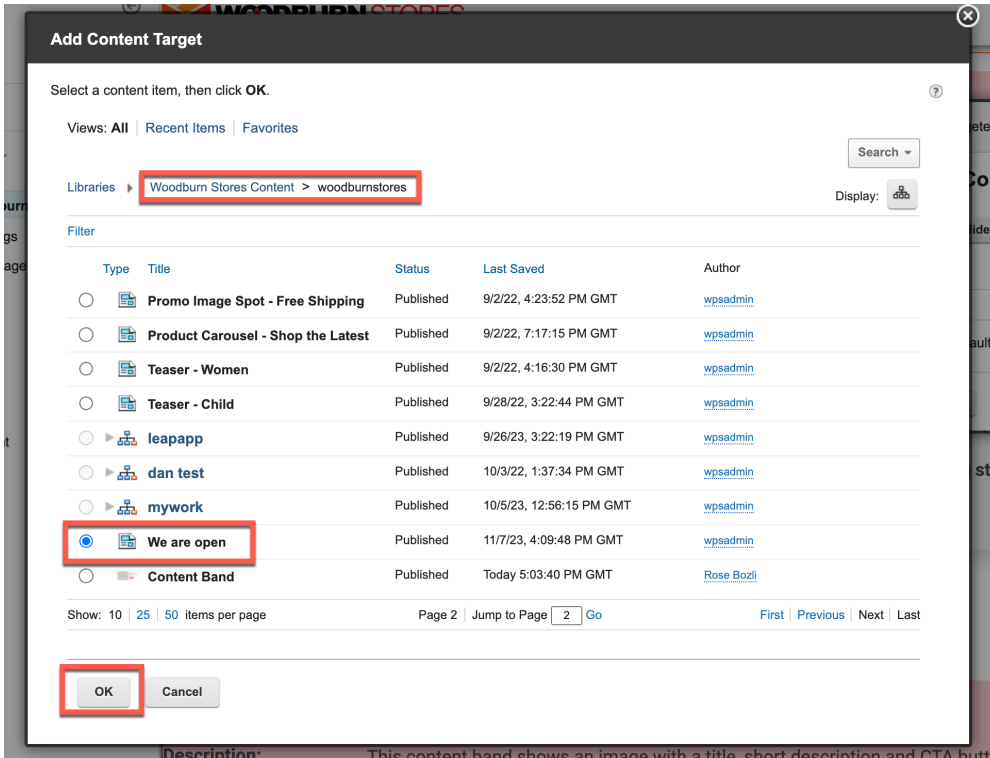
13. Make it a target spot first. Change **Configure Spot** from **Contextual Content** to **Targeted Content**.



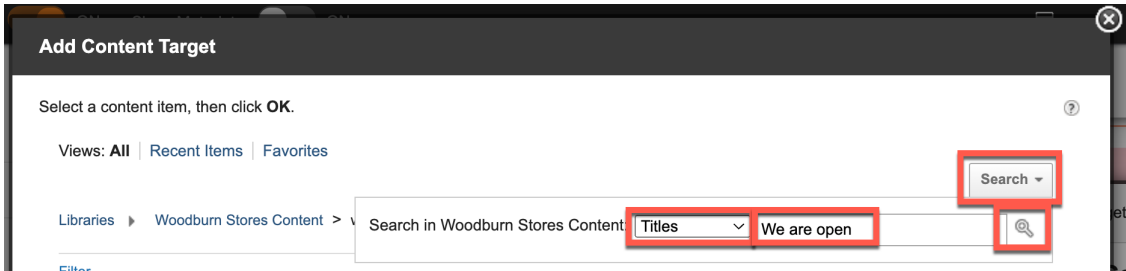
14. The default content is set to the **We are closed** that you just created. Now add another content that shows when it is open. Click **Add Content**.



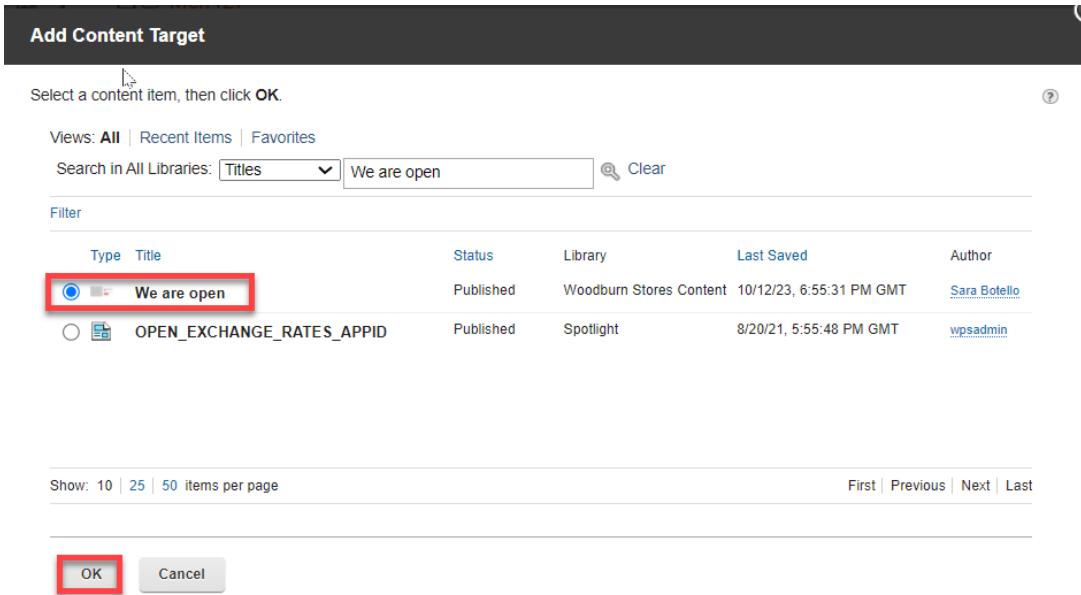
15. The **We are open** content item has already been created for you. Browse under Woodburn Stores and select it and click **OK**.



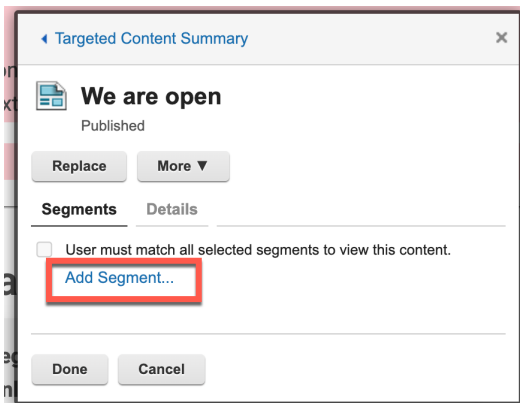
- Optionally, search for it using the **Search** button, change the search criterion to **Titles** and enter the text **We are open**. Use the magnifying glass to start the search.



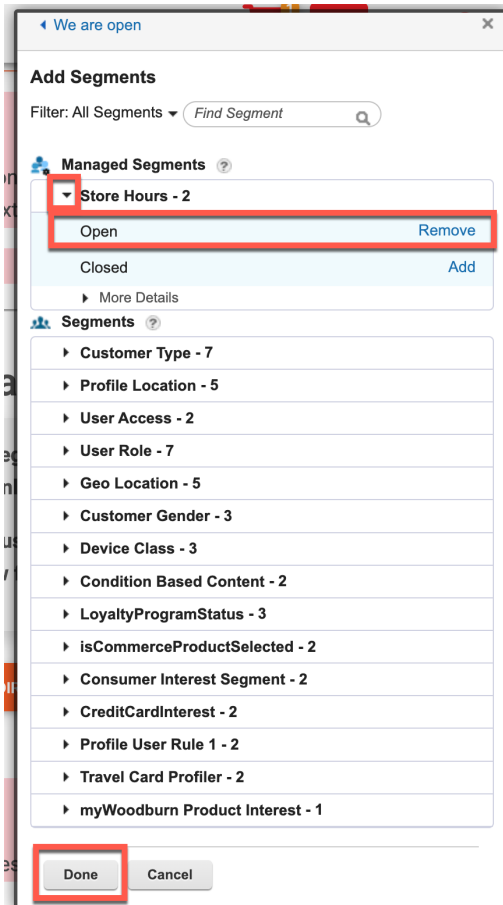
- Then select the **We are open** item and click **OK**.



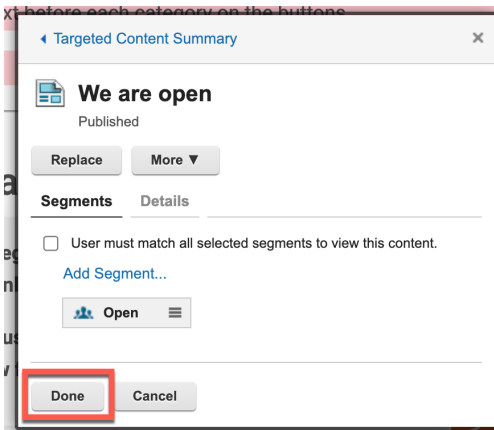
- Now configure this content to show only when the office is open. Select the segment that was created earlier. Click **Add Segment...**



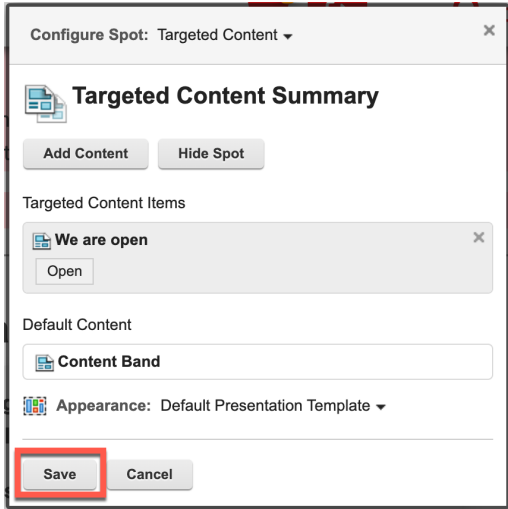
19. Expand the **Store Hours** in the **Managed Segments** section and hover next to **Open** and click **Add**. Then click **Done**.



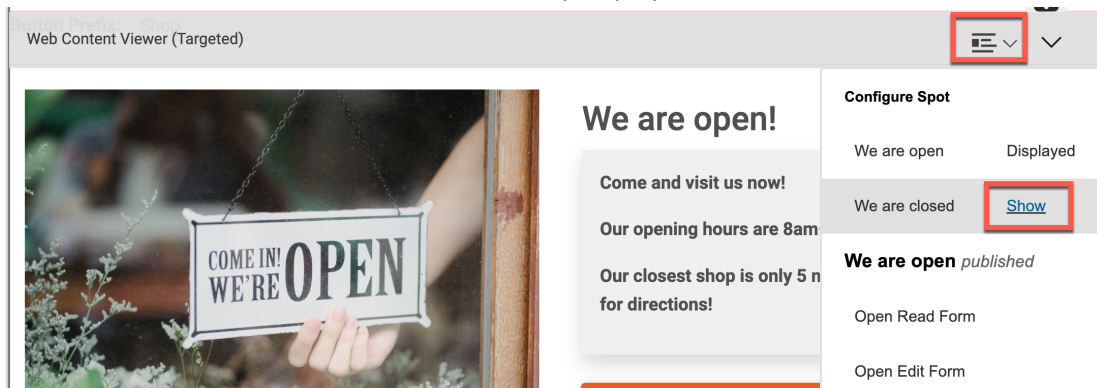
20. Check your configuration and click **Done** again.



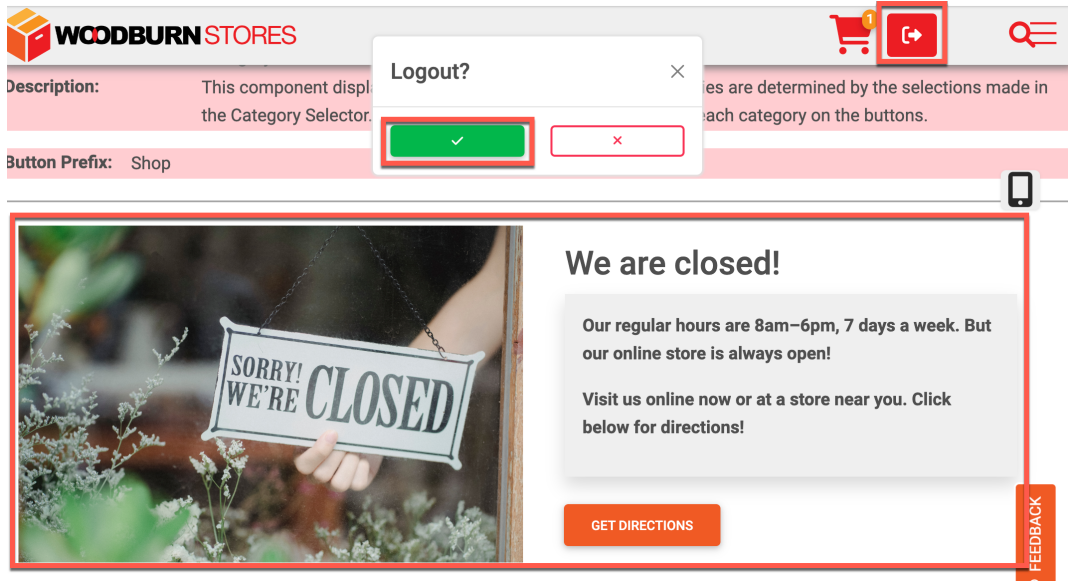
21. Check the Targeted Content Summary. The default content, **We are closed**, will show unless the **Open** segment matches the current time. If the **Open** segment matches the current time, the **We are open** content displays. Now save it. Click **Save**.



22. Depending on the server time, either the **We are open** or the **We are closed** content will display. To see what the other content would look like, click the **Content Menu** again and **Show** next to the content which is not currently displayed.



23. **We are closed** displays. Now log out as Rose. Click the log out icon and click **OK**.

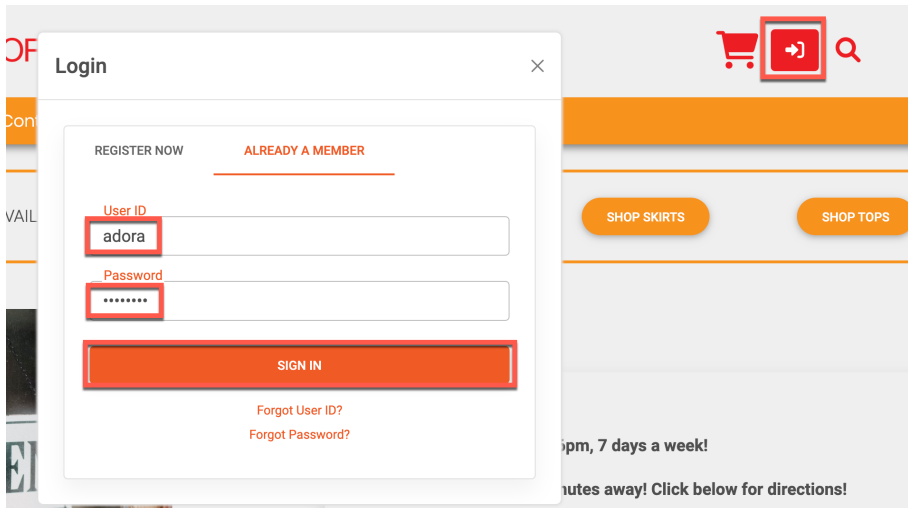


Congratulations! You have successfully configured a targeted content spot to show the **We are open** content item during store hours as defined by a segment group created earlier. If it isn't business hours, then the **We are closed** content displays.

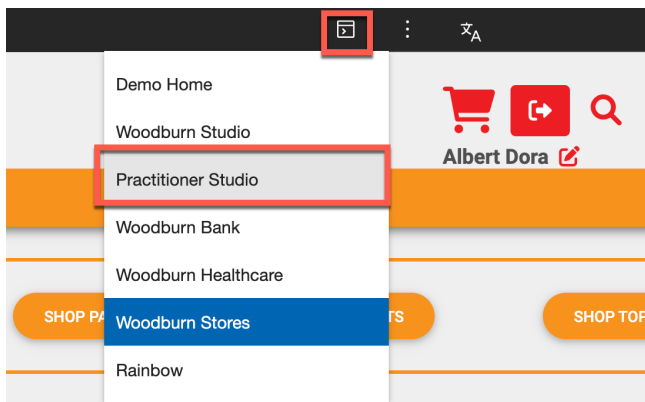
Optional Part 3: Create the Store Hours using Personalization

You may also use Personalization to create these and more advanced rules. As Albert, you will recreate the Store Hours rule, as a profiler rule, under a dedicated Office folder.

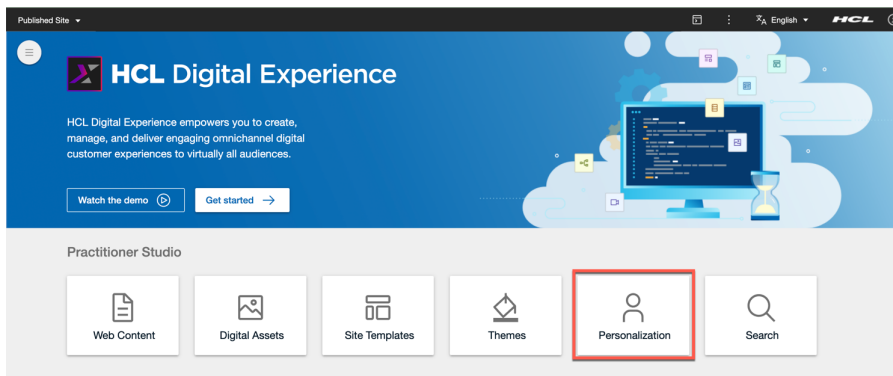
1. Log in as Albert. Click **LOG-IN**, enter **User ID adora** and **Password HCL-Dem0** and click **SIGN IN**.



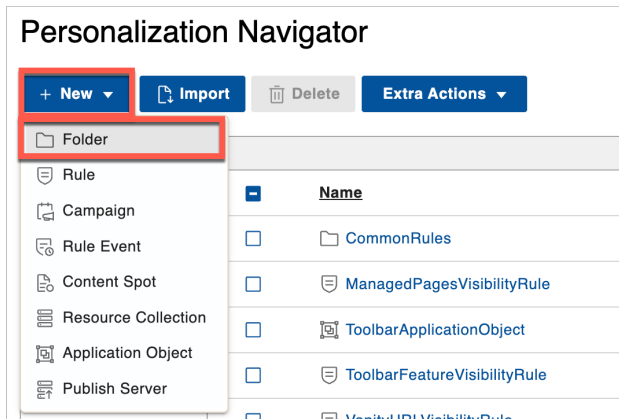
2. Then open Personalization under the Practitioner Studio. Open the site menu and click **Practitioner Studio**.



3. And click **Personalization**.

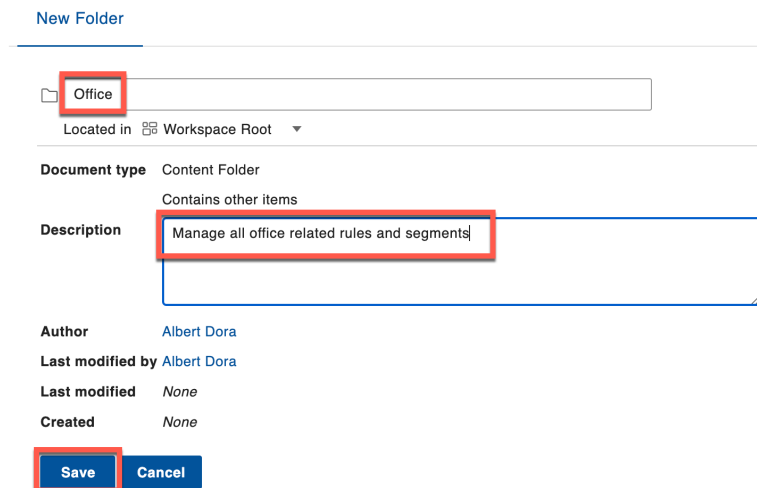


- The Personalization Navigator is displayed. Create a folder called Office to organize the new rules. Click **New** then **Folder**.



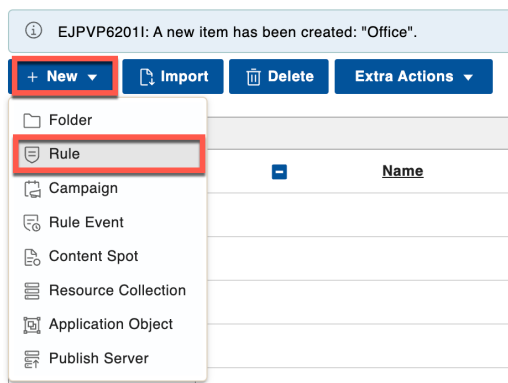
- Enter the name **Office**, description like **Manage all office related rules and segments** then click **Save**.

Personalization Editor



- The focus should now be in the new **Office** folder. While in this folder, create a new Store Hours profiler rule, the name used for segment groups in Personalization. In the **Personalization Navigator**, click **New** then **Rule**.

Personalization Navigator



- Notice you have the same interface as with segments. Update the name to **Store Hours**, set a clear **description**, like **Defines the opening hours for our store**, change the **Rule Type** to **Profiler**, set the first **Profile** to **Open** and click **Submit** to save.
Personalization Editor

New Rule Preview

Store Hours

Located in Office

Description Defines the opening hours for our store

Rule type Profiler

A profiler rule will group a user into one or more profiles. These profiles may be used within the context

Store Hours is Profile *Open when attribute * is value * Submit Cancel

- Then configure in the same way as before between 8am and 6pm. Set **attribute** to **Date – Time**, change **is** to **is between**, set the times for both values of 8:00 AM and 8:00 PM and click **Submit** after each, update the otherwise profile to **Closed** and click **Save** to save it. The rule now looks like this.

Store Hours is

- Open when
 - current Date.Time is between 08:00 AM UTC and 08:00 PM UTC
 - add Condition
 - add Profile
- Otherwise Closed

String comparisons in this rule are case insensitive.

This rule returns the first matching profile for the current user. Do not select this option if a user might match more than one profile.

Save Cancel

- Your new Store Hours profiler rule shows in the Office folder.
Personalization Navigator

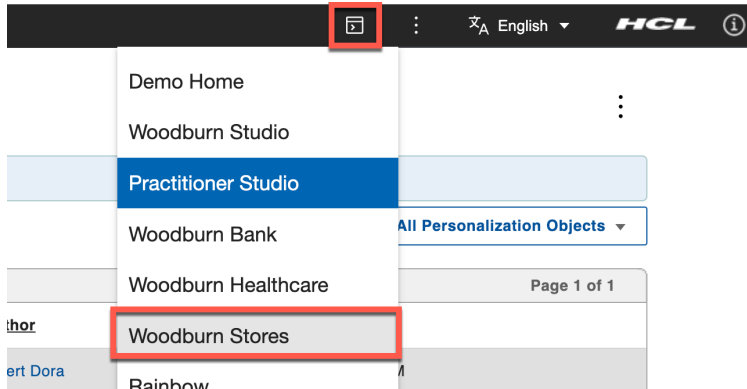
EJVPV62011: A new item has been created: "Office/Store Hours".

+ New Import Delete Extra Actions Select View:

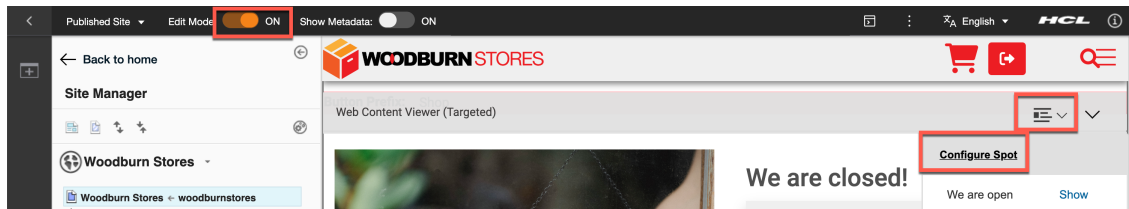
Name	Type	Author
Store Hours	Profiler	Albert Dora

Hide explorer view (1 selected)

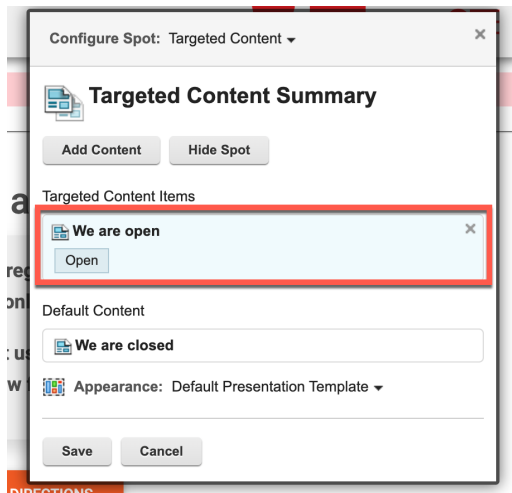
- Check that your new Personalization profiler rule is now available when configuring a content spot. Go to your Woodburn Stores site again. Open the site menu and click **Woodburn Stores**.



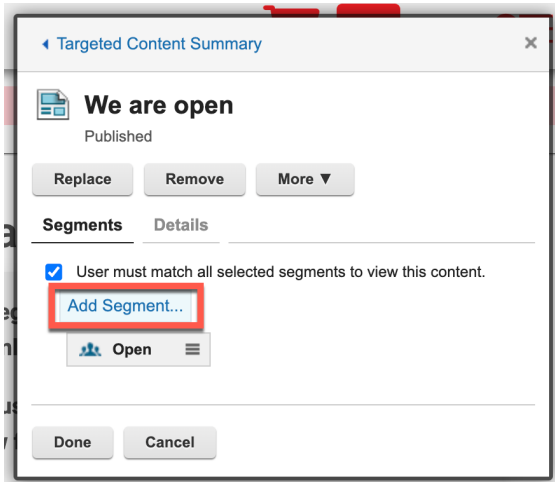
- Then enable the **Edit Mode**, open the **Content Menu** and click **Configure Spot**.



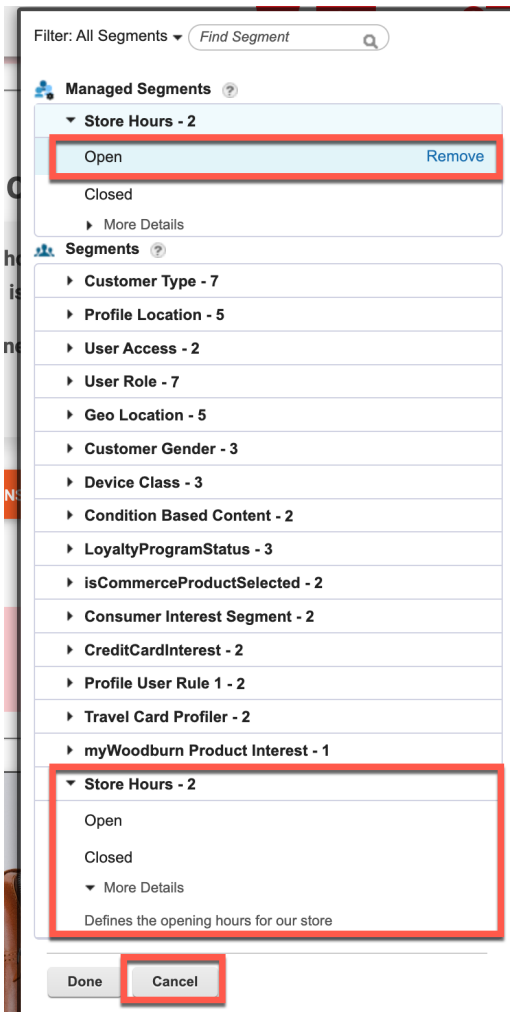
- Edit your existing target content item. Click **We are open**.



13. Then to test, click **Add Segment...**



14. You see your current selection was the Web Content Segments group Store Hours under **Managed Segments** and you now also see under **Segments**, your new Store Hours Personalization Profiler. You do not have to update this. If you want, you may take a look at other profiler rules that have been created in Personalization.



Congratulations, you have successfully created a Store Hours profiler rule under an Office folder using Personalization, which can be used to target different content during open and closed hours!

Conclusion

Using this lab tutorial, you learned how easy it is to create a Segment Group with an Open segment when the current time is between 8:00 am and 6:00 pm, and a close segment otherwise. You then learned how to use the segment group with a new page component where you would show an open and close message, based on these segments. And you learned how to use Personalization to create a folder and the same rule, called profiler.

Resources

Refer to the following resources to learn more:

HCL Digital Experience Home - <https://hclsw.co/dx>

HCL Digital Experience on HCL SoFy - <https://hclsofy.com/>

HCL Software - <https://hclsw.co/software>

HCL Product Support - <https://hclsw.co/product-support>

HCL DX Product Documentation - <https://hclsw.co/dx-product-documentation>

HCL DX Support Q&A Forum - <https://hclsw.co/dx-support-forum>

HCL DX Video Playlist on YouTube - <https://hclsw.co/dx-video-playlist>

HCL DX Product Ideas - <https://hclsw.co/dx-ideas>

HCL DX Product Demos - <https://hclsw.co/dx-product-demo>

HCL DX Did You Know? Videos - <https://hclsw.co/dx-dyk-videos>

HCL DX GitHub - <https://hclsw.co/dx-github>

HCL DX Web Developer Toolkit - <https://github.com/HCL-TECH-SOFTWARE/WebDevToolkitForDx>

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