HCL Digital Experience

HDX-BU-200
Search Lab

HCLSoftware U

Creating a new generation of experts

Edition: September 2024

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Bio

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Introduction

This hands-on lab gets you familiar with the HCL Digital Experience (DX) platform and using the site search engine.

In this DX back-office user lab, you will play the role of Sara, a marketing rep.

Sara Botello, Marketing Rep, based in Madrid (Spain)

Sara is a marketing representative and will perform some searches to identify articles and content to be modified later.

Prerequisites

1. Completion of previous HDX-Intro and HDX-BU-100 courses, including the optional labs. In HDX-Intro you get an introduction to Woodburn Stores, while in HDX-BU-100 you learn how to use the Site Manager.
2. Have a running DX instance on CF219 or newer. The lab is using the DX Solution Modules in HCL SoFy (https://hclsofy.com/catalog/dx-solution-modules) with its Woodburn Healthcare site. Note that if using your own instance, you will need to adjust the lab accordingly.
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 Sara	sbotello	HCL-Dem0

Lab Overview

In this lab, you will quickly run some searches to identify types of information on the site. First, using query syntax, you will search for articles about a particular topic. Second, you will use your knowledge as a business user to identify all products listed on the site by searching using the authoring template. And you will learn how to use the tagging and rating to help other users to find the right information more easil
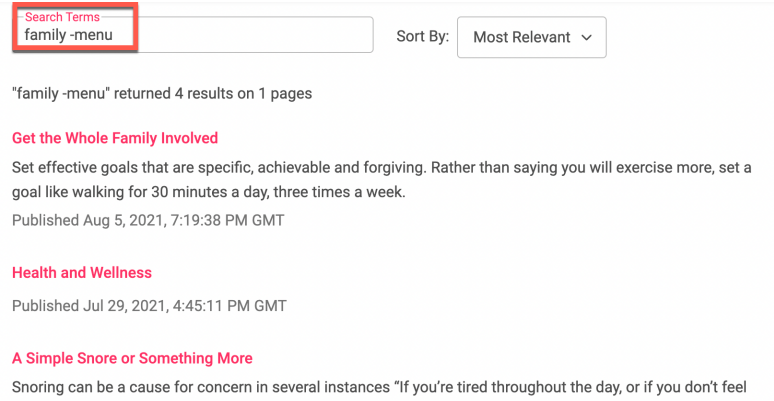
Part 1: Use Search Center in Woodburn Studio

As Sara, you will discover the out of the box search that uses the Search Center. You'll learn how to do specific searches on a product.
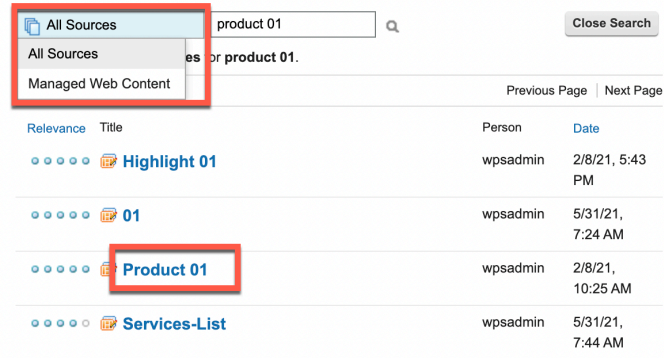
Part 2: Use customized searches in Woodburn Healthcare

Then, you will search for all articles relating to family on the Healthcare site, using various query syntaxes.

And you will perform a search to itemize all the products that are offered on the Healthcare site.

Search Terms
authoringtemplate::"Product - CT"

Sort By: Most Relevant ▾

"authoringtemplate::"Product - CT"" returned 6 results on 2 pages

Fitbit Charge 4 Fitness and Activity Tracker with Built-in GPS

Built-in GPS to see your pace and distance on screen during outdoor runs, rides, hikes and more and see a workout intensity map in the app that shows your heart rate changes along your route 24x7 heart rate to track resting heart rate & better measure calorie burn. Syncing to mobile devices requires Bluetooth LE and internet connection.

Published Aug 23, 2021, 7:54:02 PM GMT

Covid-19 Booster Shots

Part 3: Tagging and rating

You will also learn how to tag some content and then find any other resources that have been tagged with health and easily access them.


Part 4: Optimize your Site for Search

And then you will learn how you may optimize your site for external search engines. You will update your page and content.

Part 1: Use Search Center in Woodburn Studio

As Sara, you will discover the out of the box search that uses the Search Center. You'll learn how to scope and do specific searches on a product.

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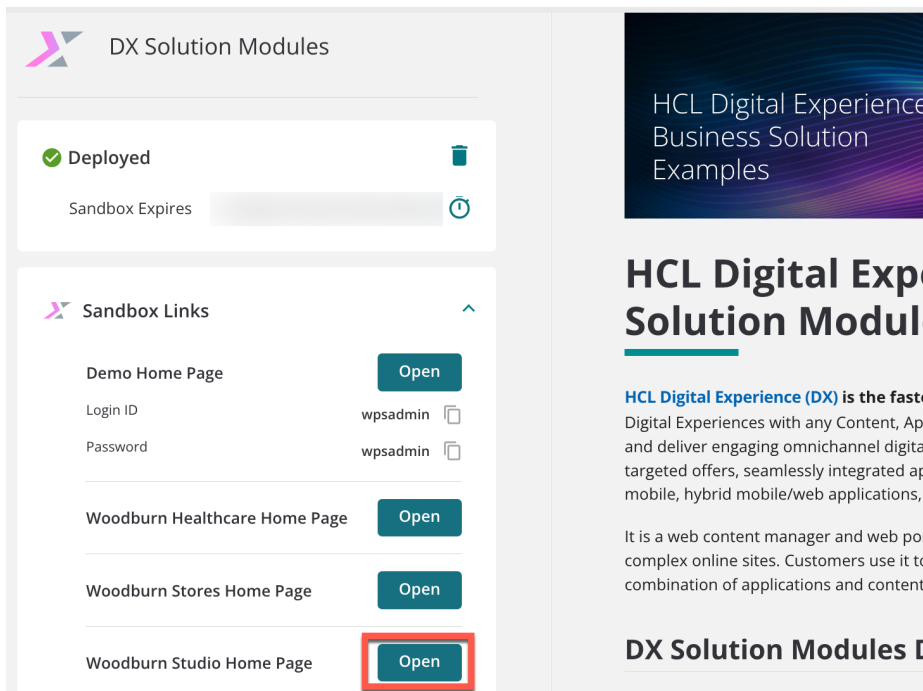

2. Notice that search is not enabled for anonymous users. Now login as the Marketing Rep Sara. Click on **Log In**. You may use **CRTL +** and **CRTL –** to zoom in and out. You may need to zoom out to see the navigation on the top. Otherwise, you'll find it under ▤ on the top right.
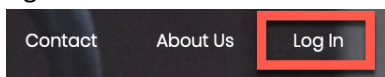

3. And login as **Sara**, using **User ID: sbotello** and **Password: HCL-Dem0**.
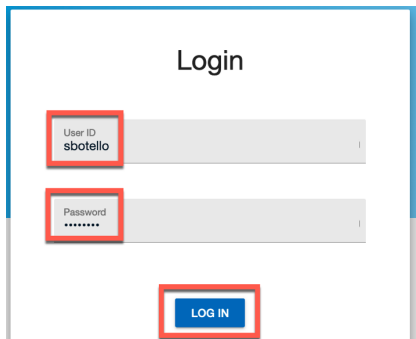
4. Now search on a word with a typo, e.g. prodocts instead of products. Enter **prodocts** and hit enter or click the search icon.
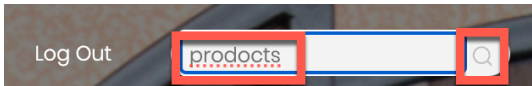

5. Now if you are not getting any results, your search may not have started crawling yet. You may ask your administrator (or use the corresponding admin lesson) to start this now of wait for it to run automatically. It is scheduled to run at 3AM UTC. If it has crawled your site, it should give this. Notice extra space to the right where you look for other You may close the the sidebar and then click on the suggested word **product**.
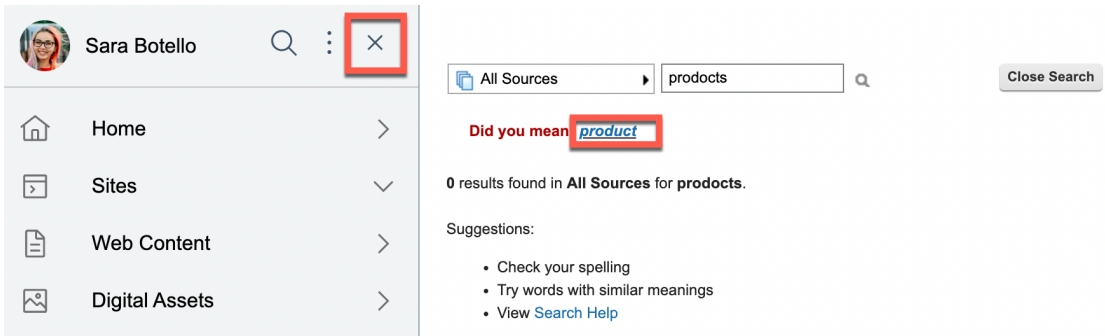

6. Now you see all results on products. Notice the different relevance, summary for certain results, options to show more results per page and go to the next page of results. Then search for a specific product, e.g. product 01. Update the search term to **product 01** and click Enter again.
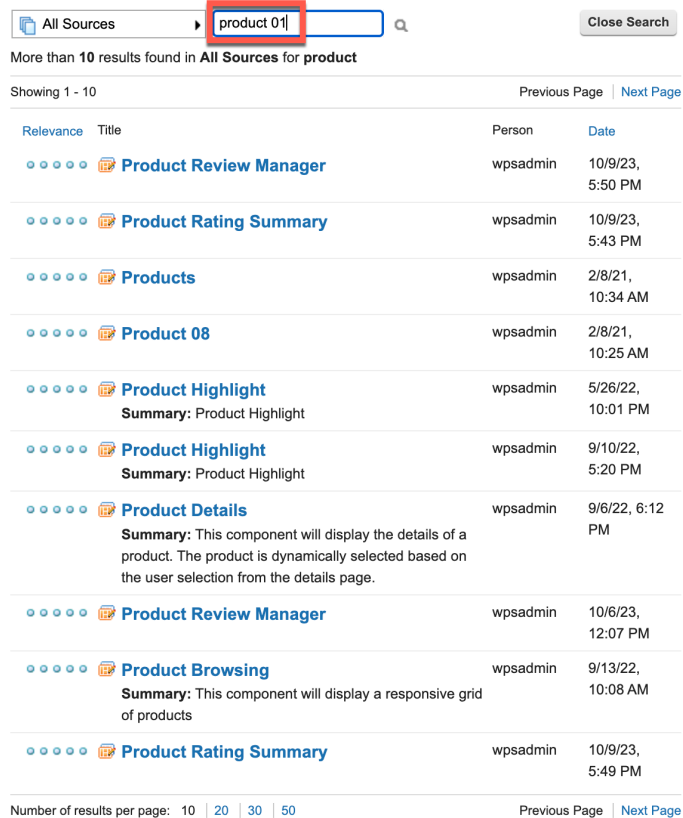
7. This gives you a much smaller result set. Notice you can change the scope from All Sources to Managed Web Content, which would search in web content only. Then open the product 01. Click it.
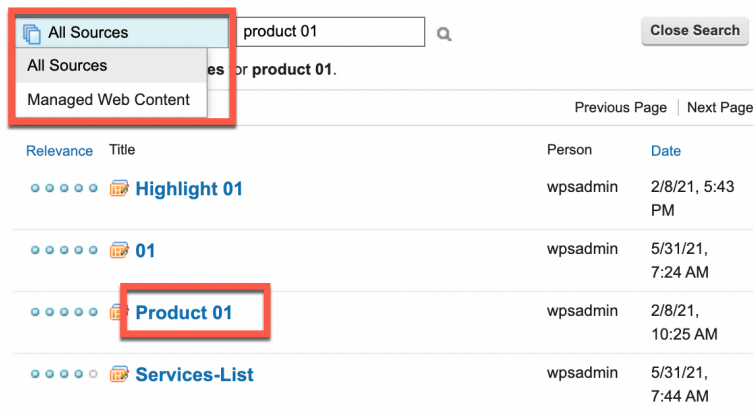
8. And this brings you directly to the right page where this content is shown.
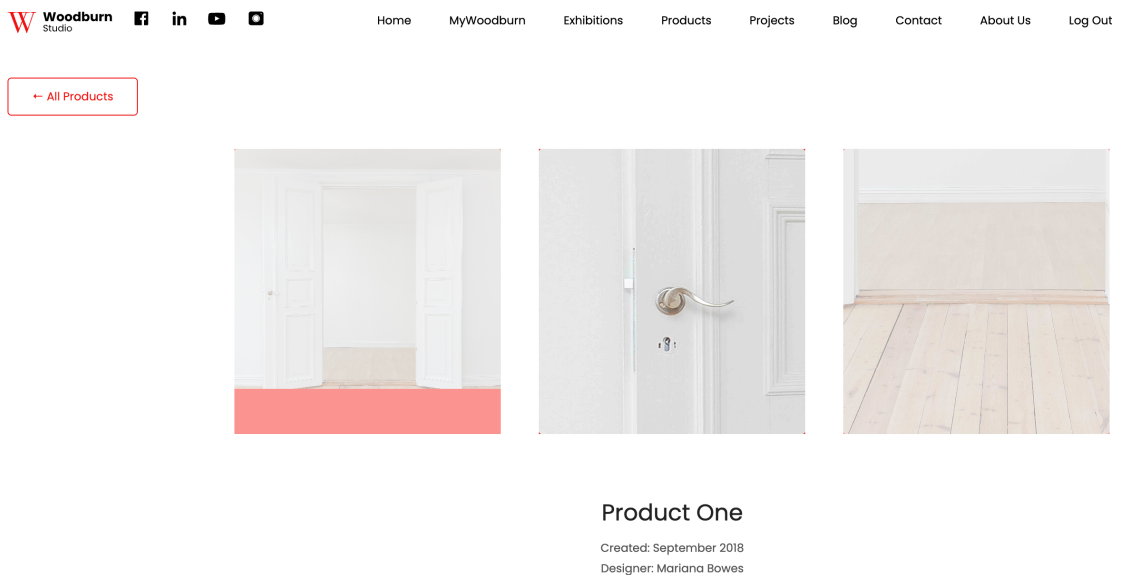
Congratulations. You have successfully discovered the Search Center.

Part 2: Use customized searches in Woodburn Healthcare

Then, you will search for all articles relating to family on the Healthcare site, using various query syntaxes. And you will perform a search to itemize all the products that are offered on the Healthcare site.

1. First go to the Woodburn Healthcare website. Open the site menu and click Woodburn Healthcare.
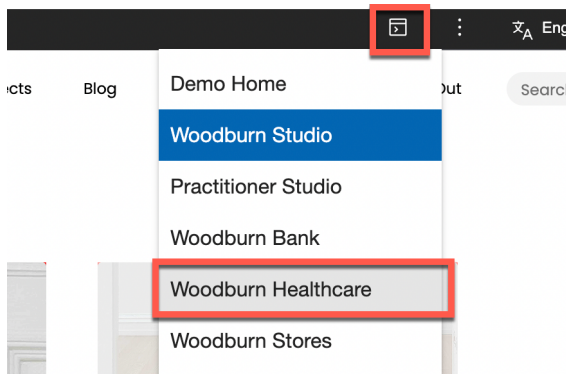
2. Click on the magnifying glass to expand the search bar.

3. Enter the text **family** into the search box and hit Enter on the keyboard to launch the search.

4. The search results will show all the results containing the word "family". There are some results that show a menu.

5. You may exclude these, by adding **-menu** to the query. Notice the type-ahead.

Search Terms
family -menu   Sort By: Most Relevant ▾

"family -menu" returned 4 results on 1 pages

Get the Whole Family Involved

Set effective goals that are specific, achievable and forgiving. Rather than saying you will exercise more, set a goal like walking for 30 minutes a day, three times a week.

Published Aug 5, 2021, 7:19:38 PM GMT

Health and Wellness

Published Jul 29, 2021, 4:45:11 PM GMT

A Simple Snore or Something More

Snoring can be a cause for concern in several instances "If you're tired throughout the day, or if you don't feel

6. You need to quickly identify all products still on the site. First, update the search term with **product** and notice you get 8 results. The search applies a filter that only searches in this site, so you don't see the same results as in the previous search with the Search Center. You may also sort it.

Search Terms
product   Sort By: Most Relevant ▾

"product" returned 8 results on 2 pages

ResMed AirSense 10

Published Aug 4, 2021, 2:51:51 PM GMT

One Drop Glucose Meter

7. Now look for all products that are created with the Content Template "Product – CT". Update the search term with **authoringtemplate::"Product - CT"**. Feel free to select any of them and see their details.

Search Terms
authoringtemplate::"Product - CT"   Sort By: Most Relevant ▾

"authoringtemplate::"Product - CT"" returned 6 results on 2 pages

Fitbit Charge 4 Fitness and Activity Tracker with Built-in GPS

Built-in GPS to see your pace and distance on screen during outdoor runs, rides, hikes and more and see a workout intensity map in the app that shows your heart rate changes along your route 24x7 heart rate to track resting heart rate & better measure calorie burn. Syncing to mobile devices requires Bluetooth LE and internet connection.

Published Aug 23, 2021, 7:54:02 PM GMT

Covid-19 Booster Shots

Congratulations! You have successfully used query syntax to search for specific words in articles, restrict the words searched for and used DX search parameters to find the right results.

Part 3: Tagging and rating

In this part, you will learn how to tag some content and then find any other resources that have been tagged with health and easily access them.
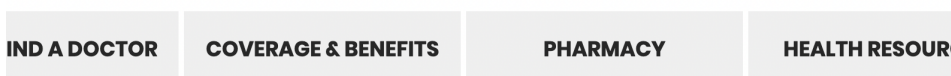
1. Now go to a health resource article. Click **HEALTH RESOURCES** and then, for example, **Eathing Healthy is Easier then you Think**.
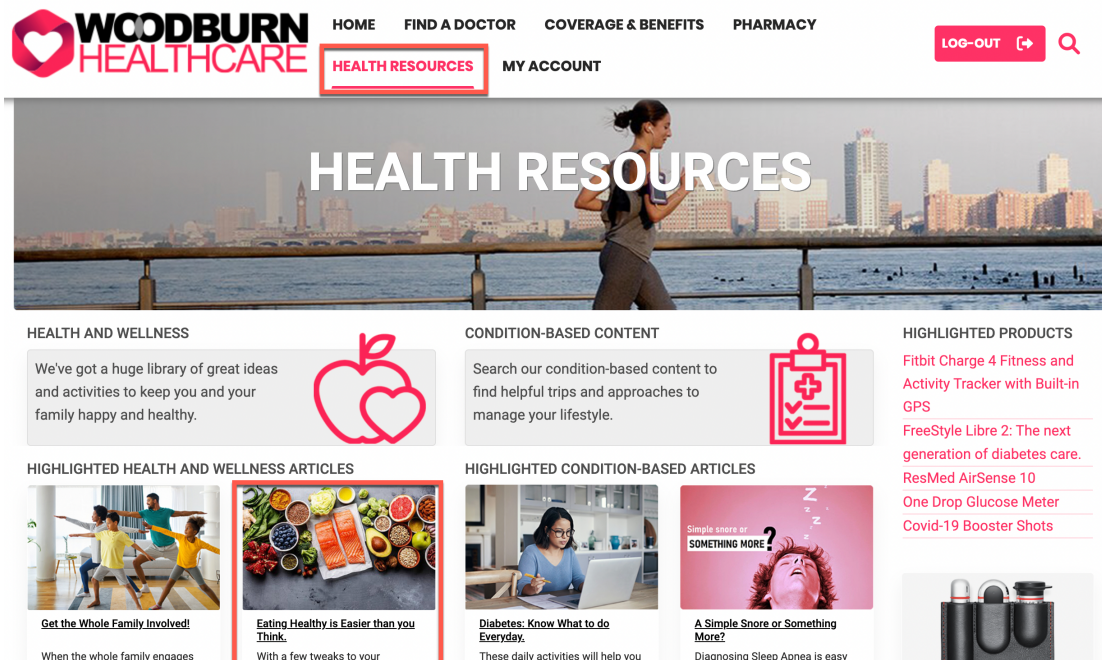
2. Scroll down and notice all current tags and rating for this content. Then add your own tag and rating. Click the **+** for tags.

3. You see you have no public tags yet. Add **health** and hit enter.

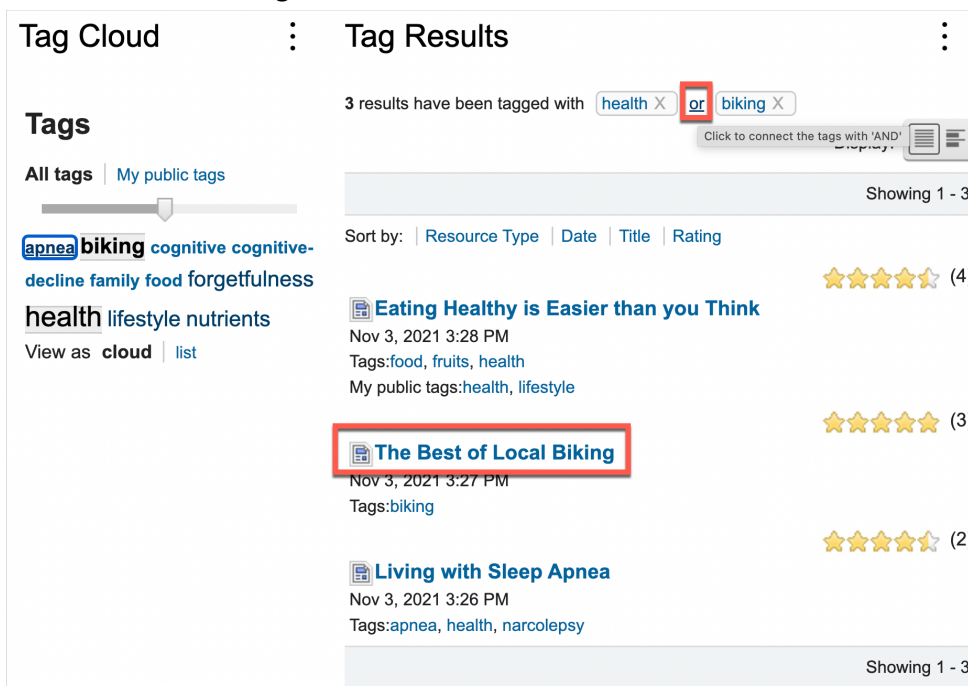4. Then add **lifestyle**.

5. And rate it with 5 stars.

6. Now search for any resources that has been tagged by anyone with health. Click **health**.
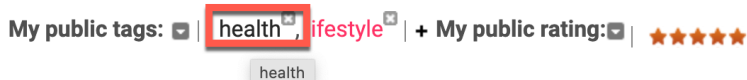
7. This brings you to the Tag Center. As you can see, currently two resources match this tag. Notice you may look for your own public tags and you see your public tags you just added to the Eating Healthy is Easier than you Think article. Notice the slider to reduce the number of tags that show in the tag cloud. Then click biking to search for any content that is tagged by biking.
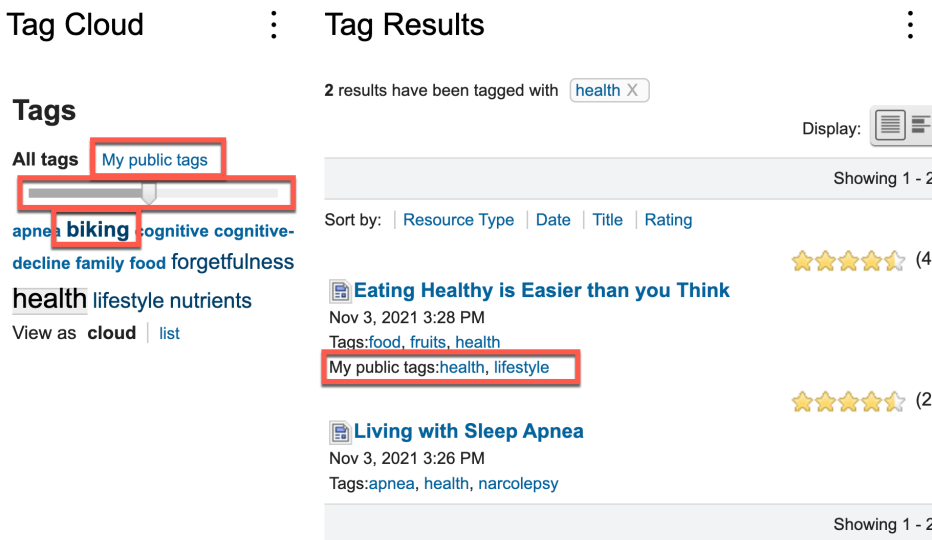
8. Now you see any resources tagged with health or biking. Notice you may change this to and and see the different display options. Then look at the details of the biking resource. Click **The Best of Local Biking**.

9. And this brings you directly to the right page with this content.

Congratulations! You have successfully learned how to tag and rate a resource and use the Tag Center to easily find the right resources.
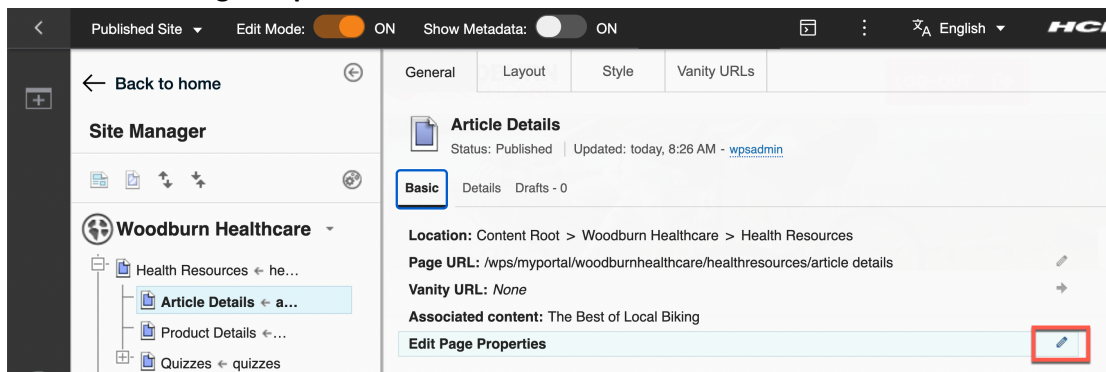
Part 4: Optimize your Site for Search

And then you will learn how you may optimize your site for external search engines. You will update your page and content.
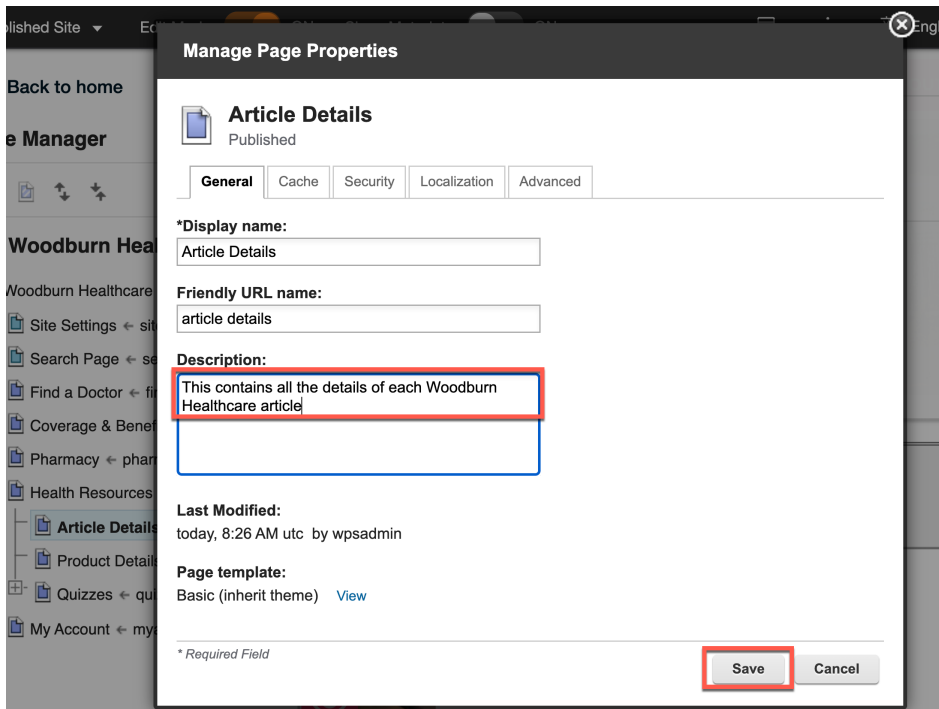
1. First put your page in the edit mode and then you may access the page settings. Open the context menu of your page **Article Details** and click **Open Page Settings**.
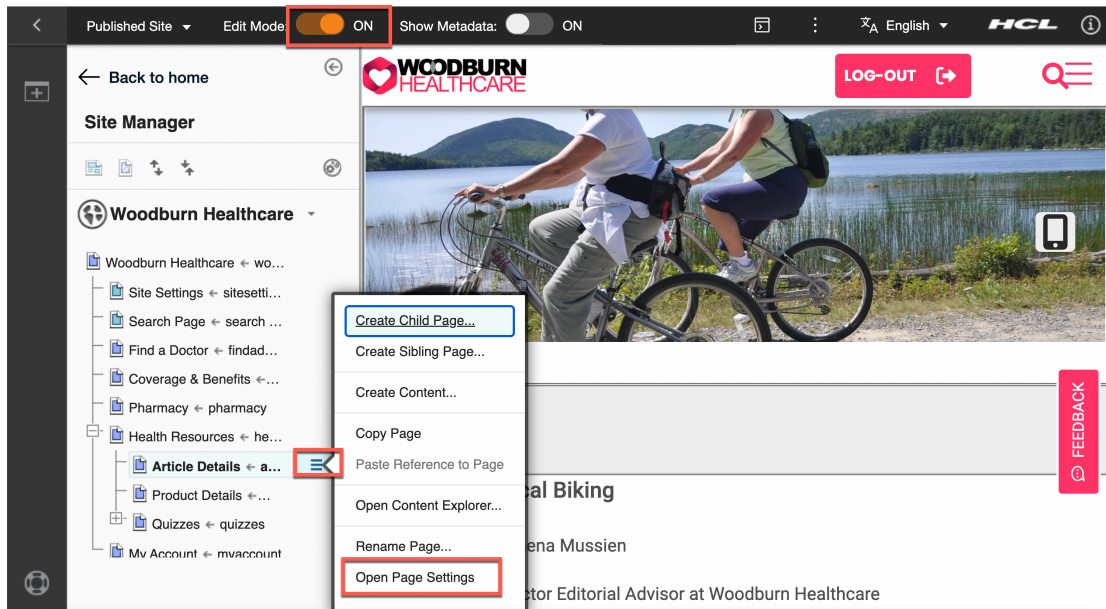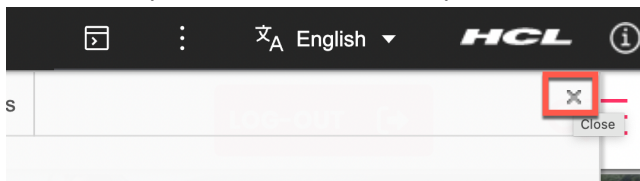

2. Then click **Edit Page Properties**.

3. Then ensure you have a good title and description. E.g. update its description with **This contains all the details of each Woodburn Healthcare article**. Click **Save** to update.

4. Then check your content. First close your toolbar.

5. Notice that you can easily update some of the meta data below, like its title, description, search summary and categories.

Content Template:	Healthcare Article - CT
Title:	The Best of Local Biking
Description:	Some Description About Biking

Short Description:	Check out the best biking routes in your region.
Search Summary:	Check out the best biking routes in your region. From easy rides with great sights to see or more rigorous courses to test your skills and strength! This article lays out all your local options.
Categories:	Health and Wellness
Index Image:	

6. Then open your content to see how these meta-data as part of your content. Open the display content menu and click **Open Edit Form**.
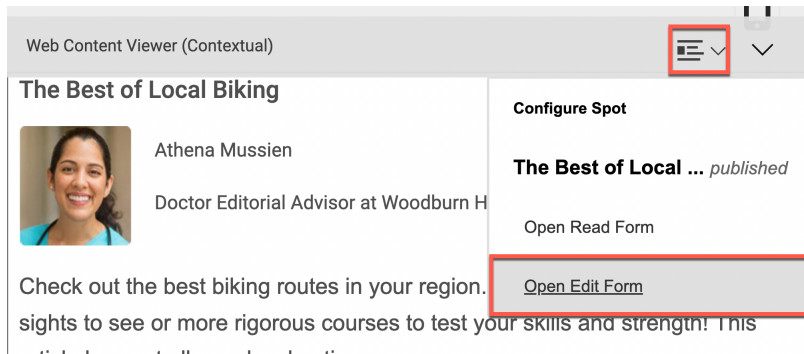

7. Notice that next to the standard title and description, additional elements exist for the search title and description. This is a designer choice. You don't have to update these now. Then check the other meta-data that are under the properties. Click **Properties**.
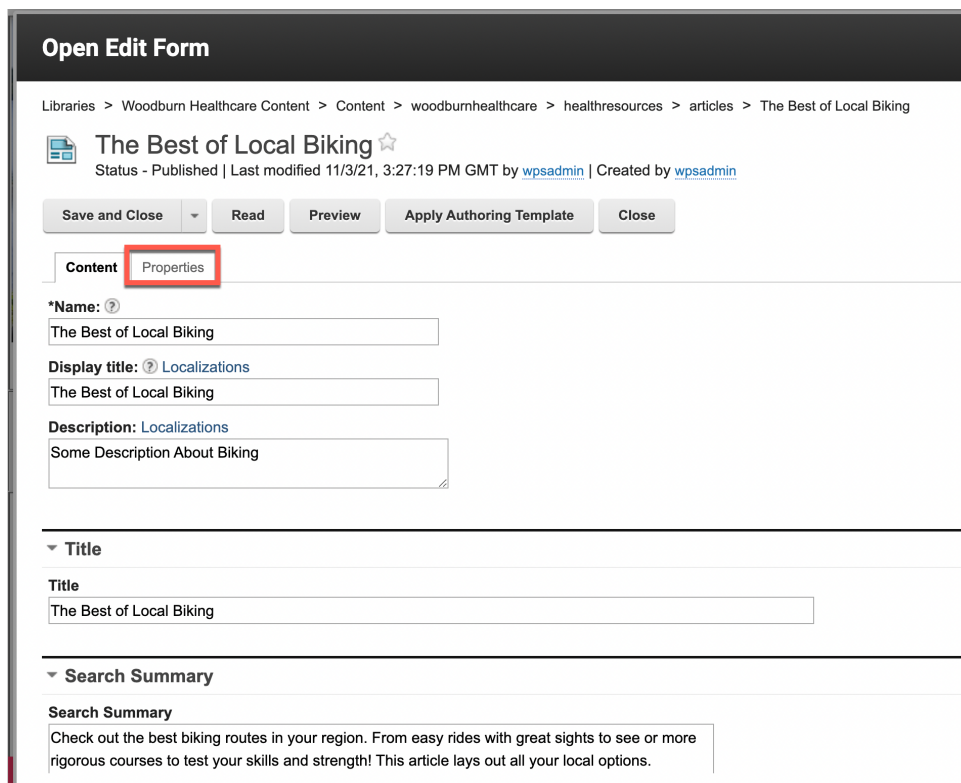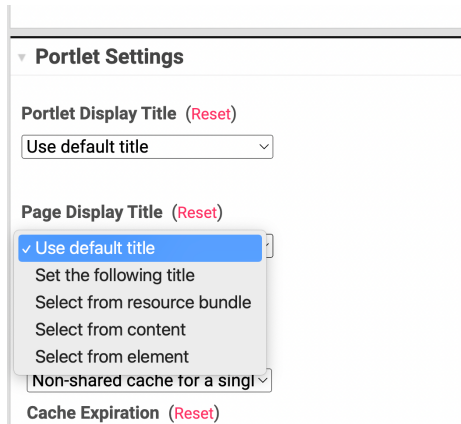
8. Here you may manage the categories and keywords for your content. Expand the Profile section. Again, no need to make any changes. Then close this. Click **Close**.
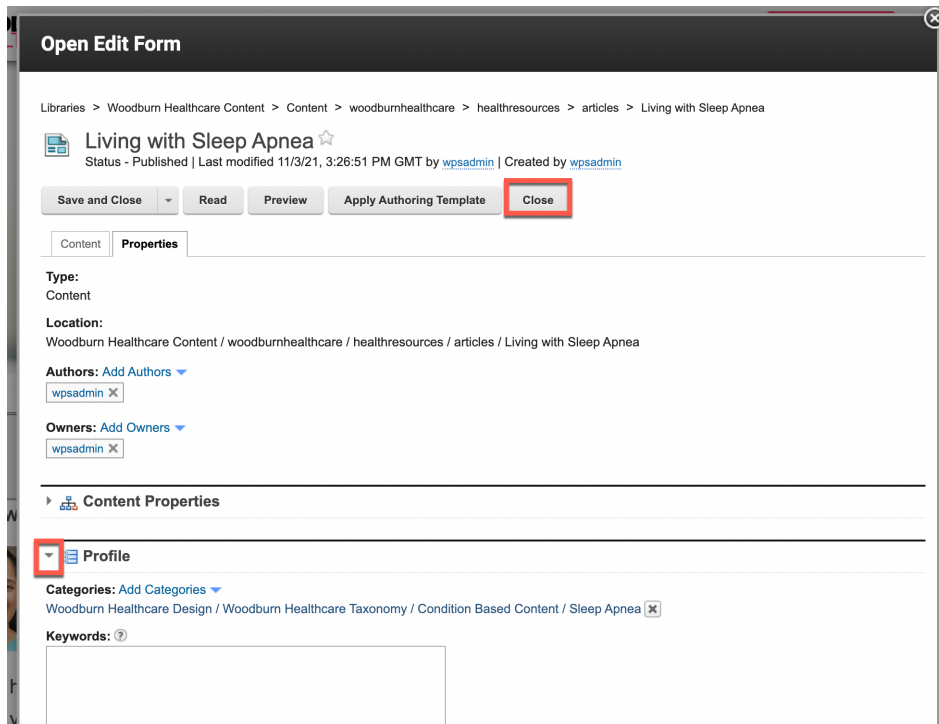
9. Then check how you may use your Web Content to control page settings. Open the display portlet menu and click **Edit Shared Settings**.
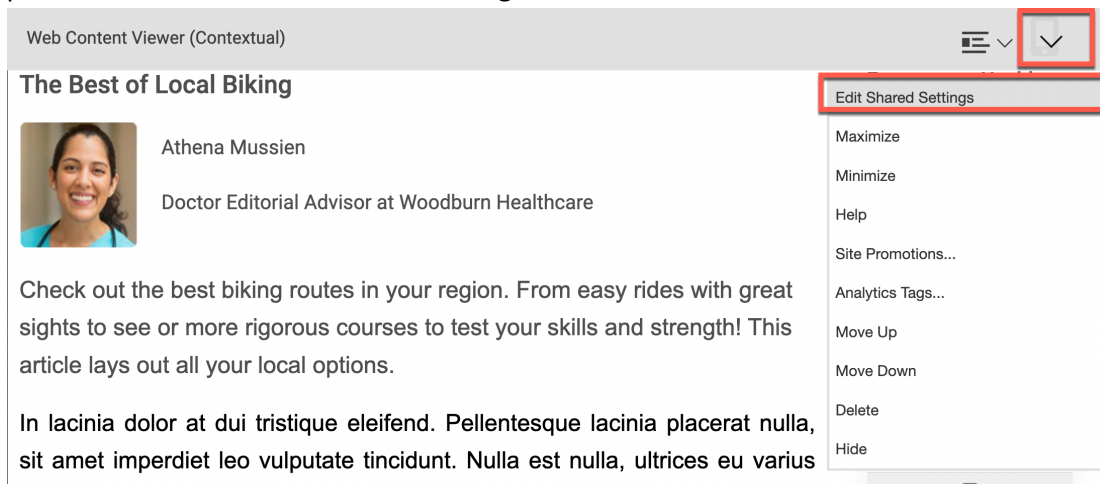
10. Scroll down and you see under the Portlet Settings your portlet and page display title options. You may set this, for example, to that search title element in your content. Leave this at is, scroll down and click **Cancel**.

Congratulations! You have successfully review where you are able to influence your pages and content for better search optimization.

Conclusion

Using this lab tutorial, you explored site search functionality provided by HCL DX. You learned how to use the out of the box Search Center and more customized search interfaces. You also learned how to use the tagging and rating that allows your users to better value your content and you learned how to update the parts of your site that influence search optimization as a business user.

Resources

Refer to the following resources to learn more:

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

HCL Digital Experience MarketPlace on HCL SoFy - **https://hclsofy.com/dx**

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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