

HDX-INT-ADM DX Integration with HCL Discover for Administrators Lab

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Bio

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Introduction

This hands-on lab gets you started on the HCL Digital Experience (DX) platform and its integration with HCL Discover. You will learn how to configure HCL Digital Experience to work with HCL Discover. This gives you a simple way analyze how your DX site is used, how to find struggles, optimize it and how to run session replays to debug any issues.

In this DX lab, you play the role of Harry Pappus who is a DX administrator.



Harry Pappus, Administrator, based in Chicago (USA)

You will need to set up the integration between DX and Discover. You will update the theme and profile with the integration resources. And you may optionally create a replay rule to show images when authenticated. Optionally, you may also make it easier for site managers to get access to the HCL Discover user interface and make the integration more modular.

Prerequisites

1. Completion of [HDX-BUS-100](#) and [HDX-ADM-100](#) (and optionally [HDX-DEV-100 Theme Development](#) for part 4 of this lab) courses, including the optional labs. This gives you a good basic understanding and helps you deploy and understand the DXClient tool.
2. Access to a DX server. You may use a SoFy DX Solution Modules (<https://hclsofy.com/catalog/dx-solution-modules>) & HCL Discover (<https://hclsofy.com/catalog/discover>) deployed.
3. Access to download the Lab Resources on the DX MarketPlace: <https://hclsofy.com/dx/catalog/dx-integration-with-hcl-discover-sample>. Download and unzip it.

You will be using the following user IDs and passwords:

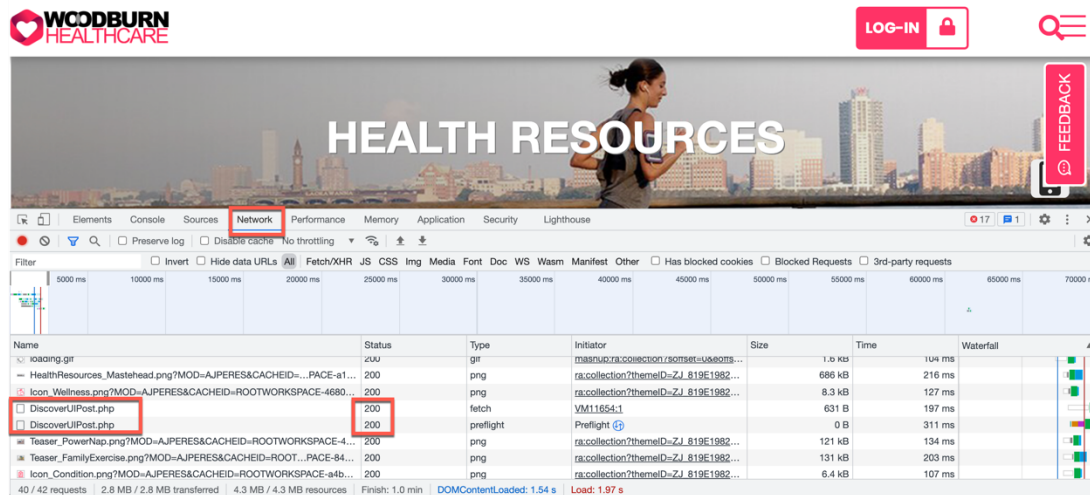
Purpose	User	Password
SoFy Login	Your official email id	Your password
SoFy Solution Console Login	sol-admin	<from SoFy solution>
DX Login	hpappus	HCL-Dem0
DX Login	wpsadmin	Wpsadmin
Discover Login	admin	<from SoFy solution>

Lab Overview

In this lab, you will setup the integration of HCL Digital Experience with HCL Discover and test it with one of the DX sites. There are several parts in this lab, shortly introduced now.

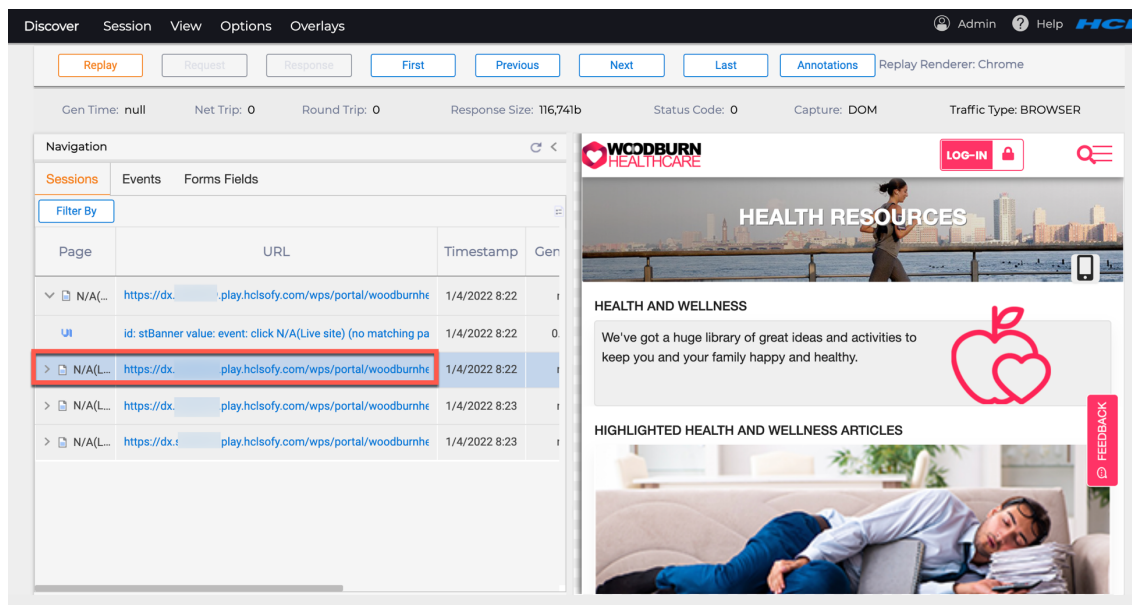
Part 1: Setup HCL Digital Experience theme with Discover extension

To allow to integrate HCL Discover with HCL Digital Experience more easily, you may use the Discover Web Content Library. This contains a Global Config to be set and a content to be added to the theme. Then you will test it if it sends the site information to the Discover server.



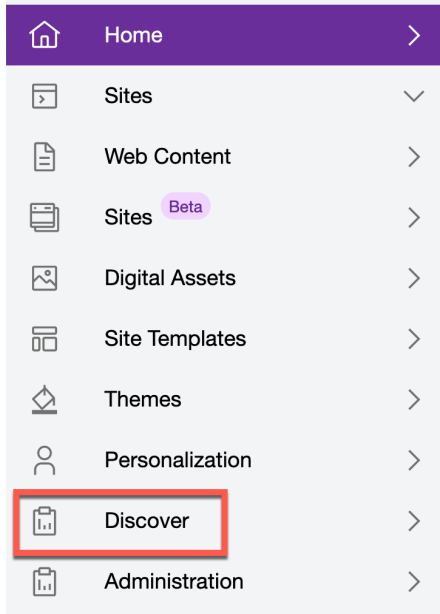
Part 2: Check DX integration in HCL Discover

The next step is to check if your navigation on a DX site gets into HCL Discover. You may optionally create a replay rule to show images when authenticated.



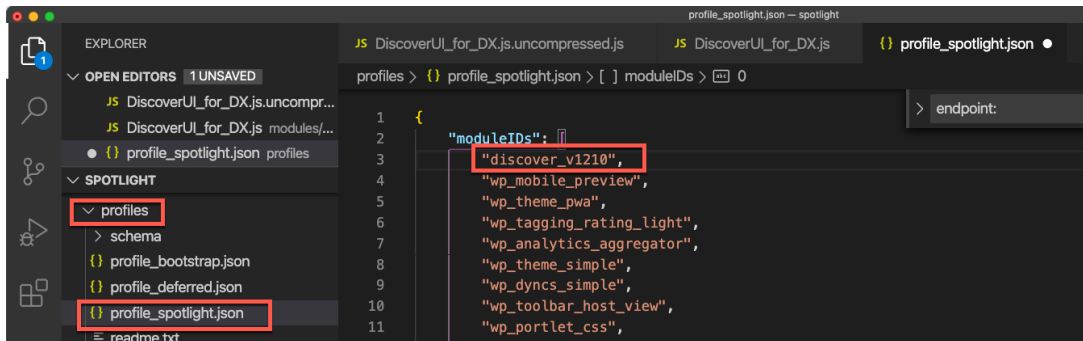
Optional Part 3: Integrate Discover in the Practitioner Studio

To allow administrators to access the Discover Portal – Home Page more easily, you may integrate access to it in the Practitioner Studio.



Optional Part 4: Setup HCL Digital Experience theme with Discover extension

Another way to configure HCL Discover with HCL Digital Experience is with theme modules. This gives you more granular control per page when to use it. In this part, you will update your theme to add the Discover modules and update the profile.



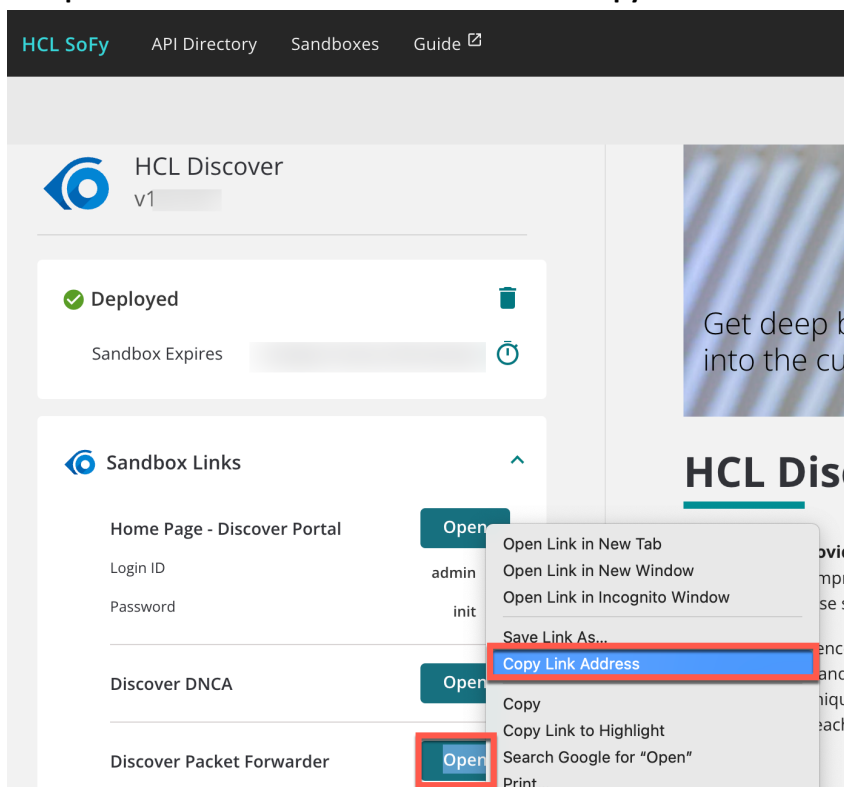
Part 1: Setup HCL Digital Experience to integrate with HCL Discover

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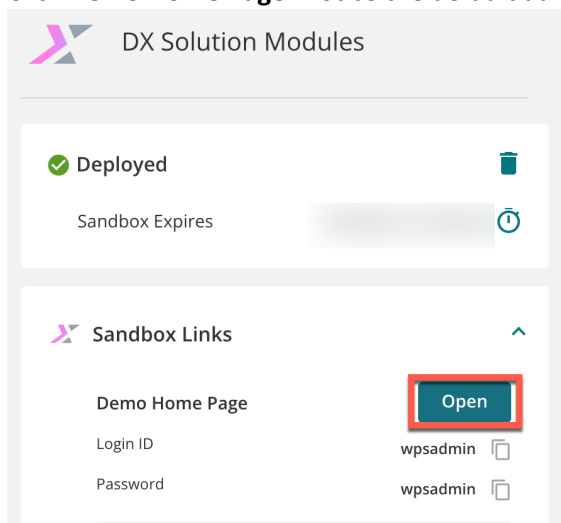
1. First import the Discover web content library. From your downloaded resource, you will find this under src/Web_Content_Library. On the DX Solution Modules on SoFy this is already done for you. To import it, use the DXClient with the following command line using an admin account, such as wpsadmin/wpsadmin:

```
dxclient wcm-library-import -libFilePath <folder where you unzipped the lab resources>/Discover-wcm-library-export.tar.gz -dxWASUsername wpsadmin -dxWASPassword wpsadmin
```

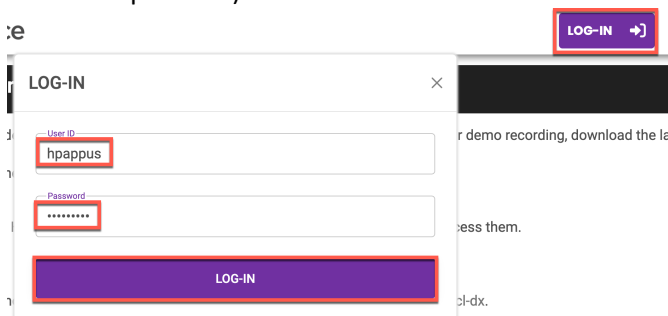
2. Then, in the Global Config of this Discover library, you need to set the Discover Packet Forwarder URL. In HCL SoFy, you get this URL from the Sandbox Links. Use the right button on **Open of Discover Packet Forwarder** and use **Copy Link Address**.



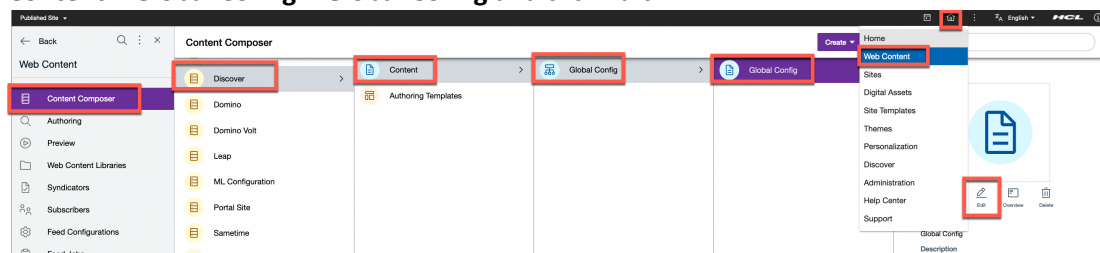
- Then log in to your HCL DX server. Use HCL SoFy to find the link to the Demo Home page. Click **Demo Home Page**. Notice the default admin login account, you could use as well.



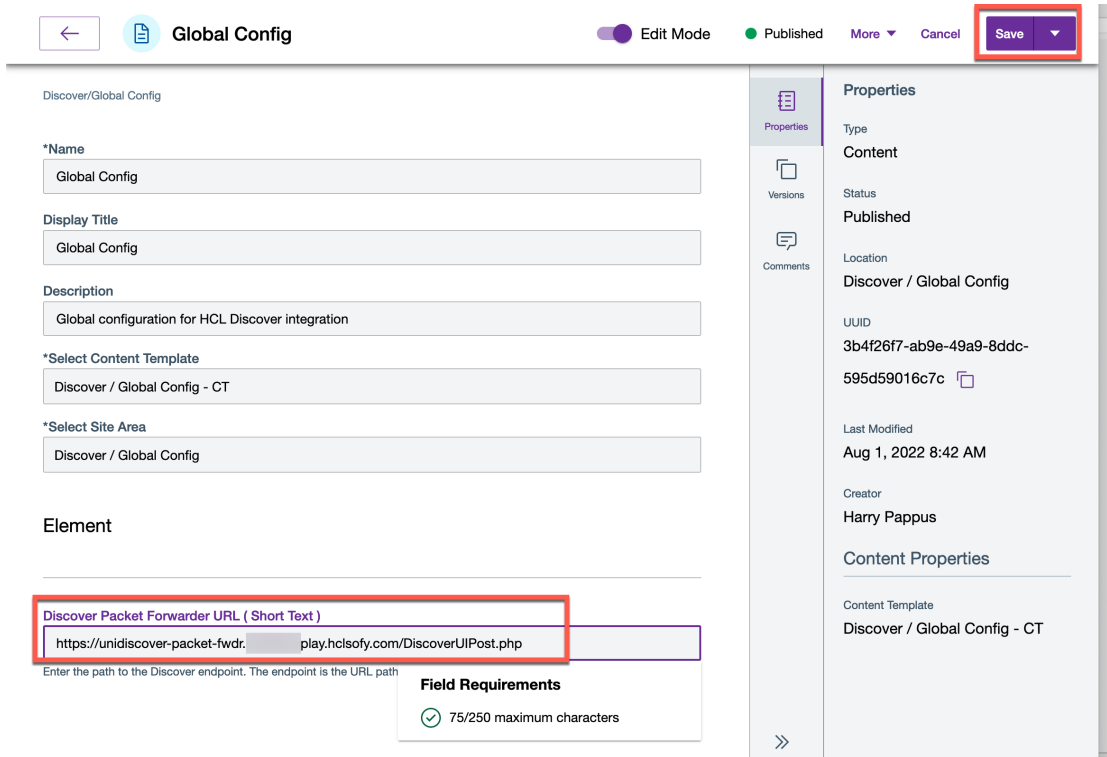
- Log in as Harry Pappus (User ID: **hpappus**, Password: **HCL-Dem0**, or the default admin account wpsadmin).



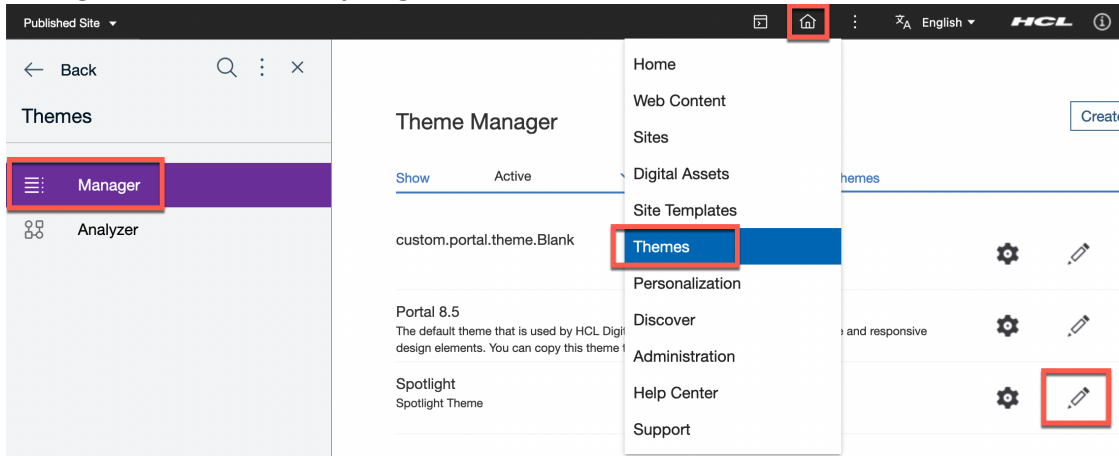
- Go to the **Practitioner Studio – Web Content** and open the **Discover** library. Then go to **Content – Global Config – Global Config** and click **Edit**.



- Here you see the Discover Packet Forwarder URL. Update it with the URL you copied before and click **Save**.



- Then you need to add this content to your theme. Again, in the DX Solution Modules, this is already done for you. You may check it now or go directly to step 9. Go to the **Theme Manager** first and edit the **Spotlight** theme.



- In the right HTML files of your theme, here theme.html, integrate this Global Config content using the dynamic content spot for WCM content as follows:

`<!-- load the HCL Discover integration /-->`

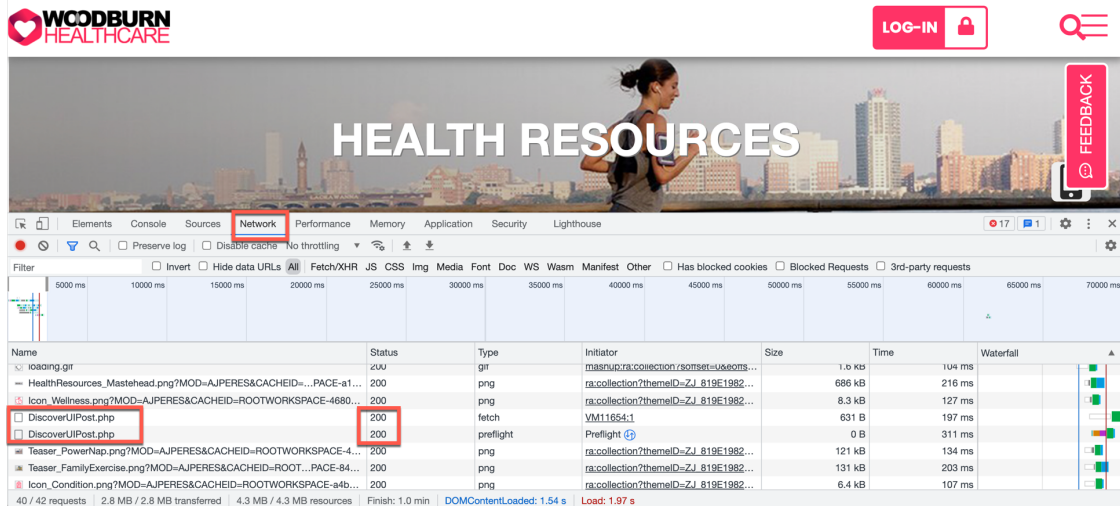
``

as shown

```

19 <link rel="dynamic-content" href="dyn-cs:id:st_head">
20
21 <!-- load the HCL Discover integration /-->
22 <a rel='dynamic-content' href='dyn-cs:id:st_wcm_content?path=Discover/Global+Config/Global+Config'></a>
23
24 </head>
25 <body id="content" class="lotusui30dojo tundra claro locale en">
    
```

- The spotlight theme is used in the MyWoodburn page (not the original Woodburn pages), Woodburn Healthcare, Woodburn Stores and in the Spotlight Site Template you may use to create your own site. Try it out as anonymous and then connected on Woodburn Healthcare. Log out and then go to the home page. Use the **developer tools** and check under **Network**, check you have valid calls with **DiscoverUIPost.php** (they are valid if the return the **200** status code). You may visit some other pages and even log in.

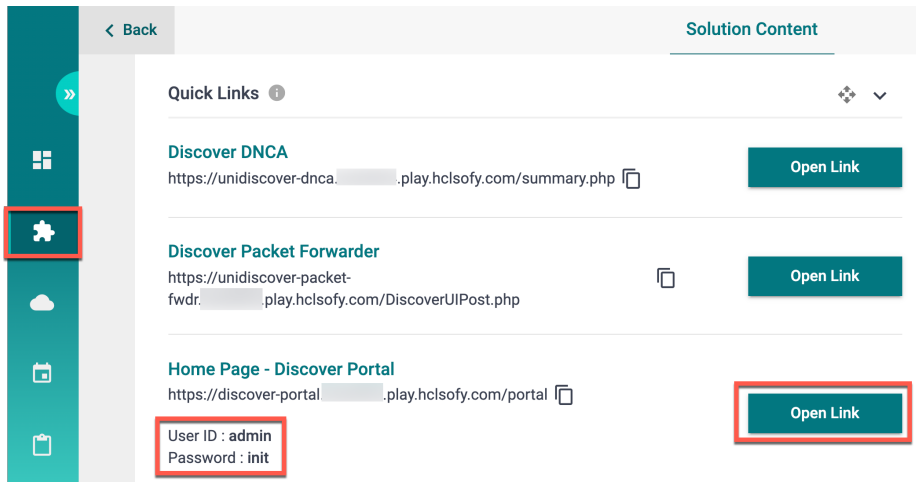


You have now successfully configured HCL Digital Experience with your HCL Discover server.

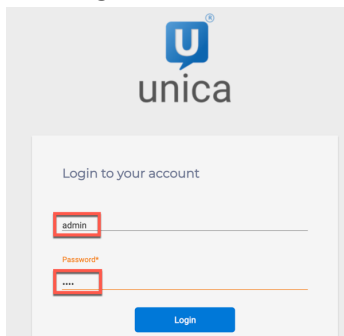
Part 2: Check DX integration in HCL Discover

The next step is to check if your navigation on a DX site gets into HCL Discover. You may optionally create a replay rule to show images when authenticated.

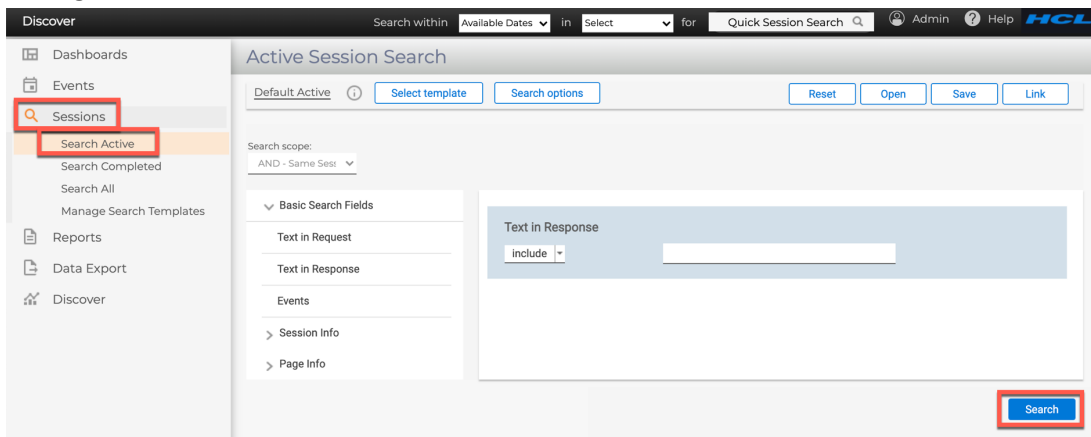
1. Open the **HCL Unica Discover Home Page – Discover Portal**. You may find the link and administrator credentials in the **Solution Content** of **SoFy**. Click the **Open Link** and remember the **User ID** and **Password**.



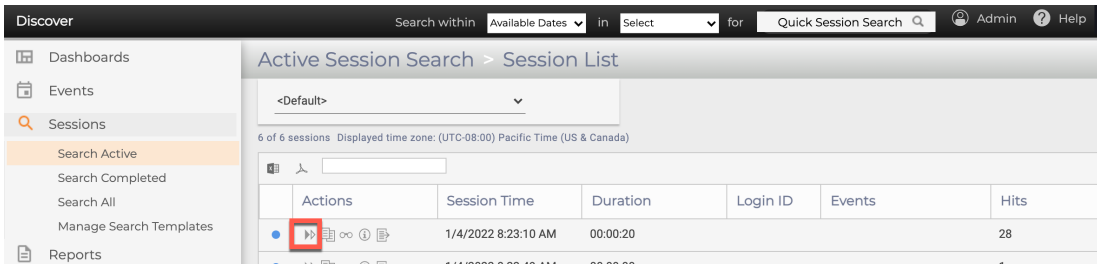
2. Then log in with this **User ID** and **Password**.



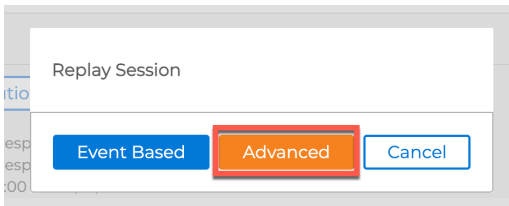
3. Then go to **Sessions – Search Active** and click **Search**.



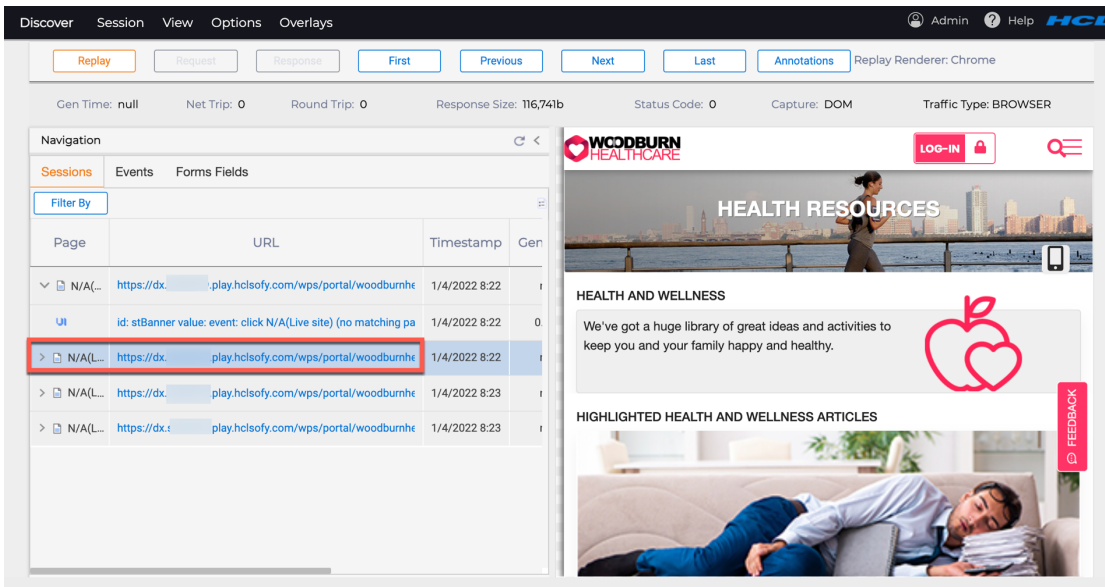
4. You see the session and all the hits generated. Then click the **Replay** option.



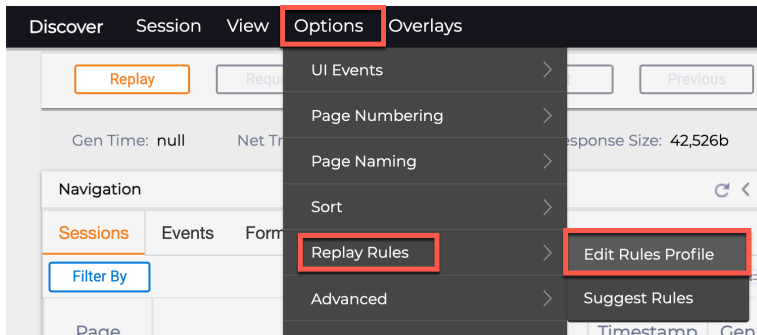
5. Select **Advanced**.



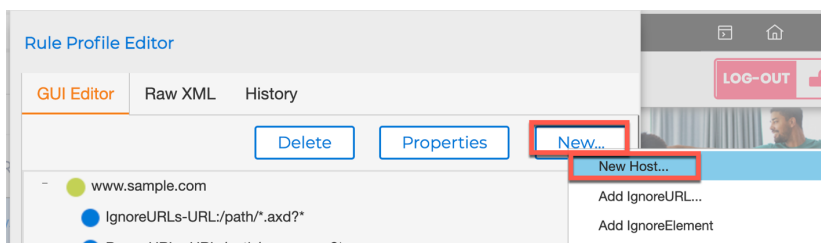
6. And then click at the pages visited in that session to replay them.



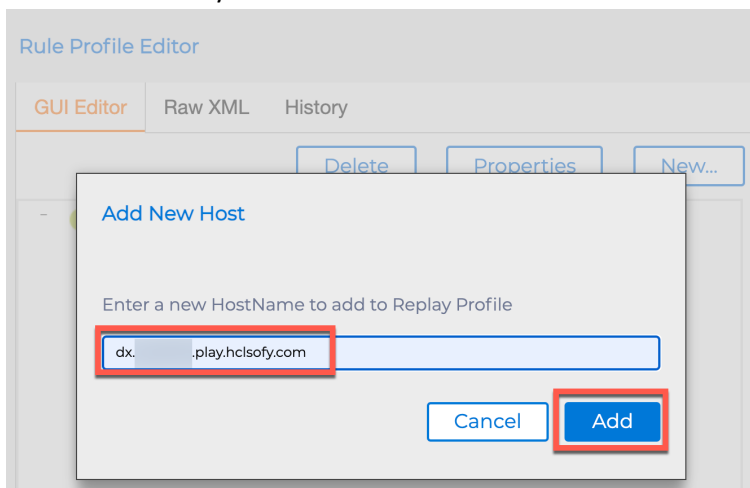
- You may notice that images do not display correctly for authenticated users. This is because the images are reloaded from the server and not put into the Discover cache data. When you do a replay of an authenticated user, the image URL is /myconnect/ (which means you need to be authenticated to see it) and this cannot be reached from Discover. To make them display correctly, you need to create a Replay Rule that replaces any /myconnect/ into /connect/. Under **Options**, click **Replay Rules** and **Edit Rules Profile**.



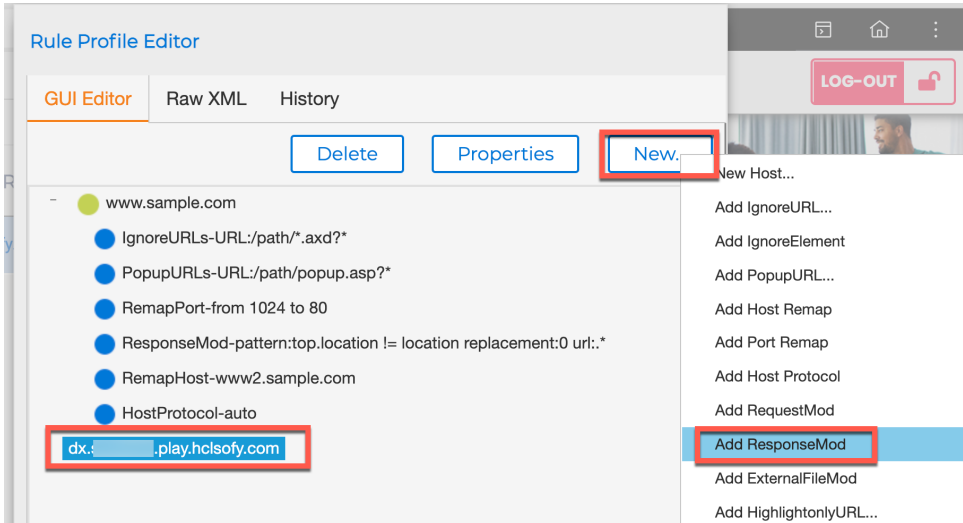
- Then click **New – New Host**.



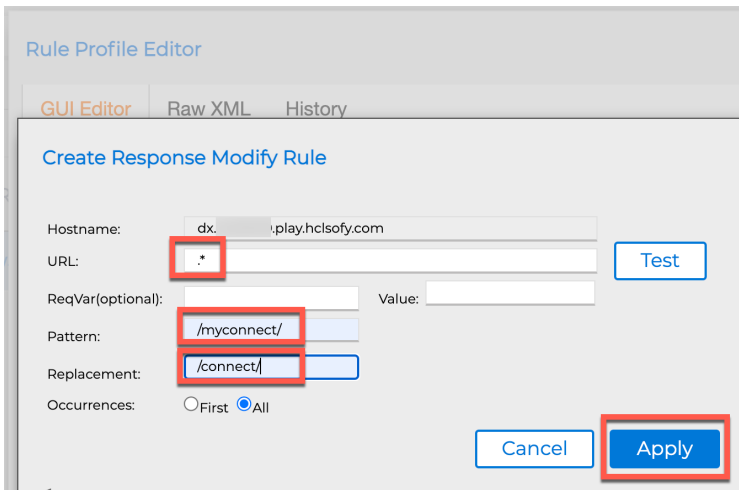
- Enter the host of your DX server and click **Add**.



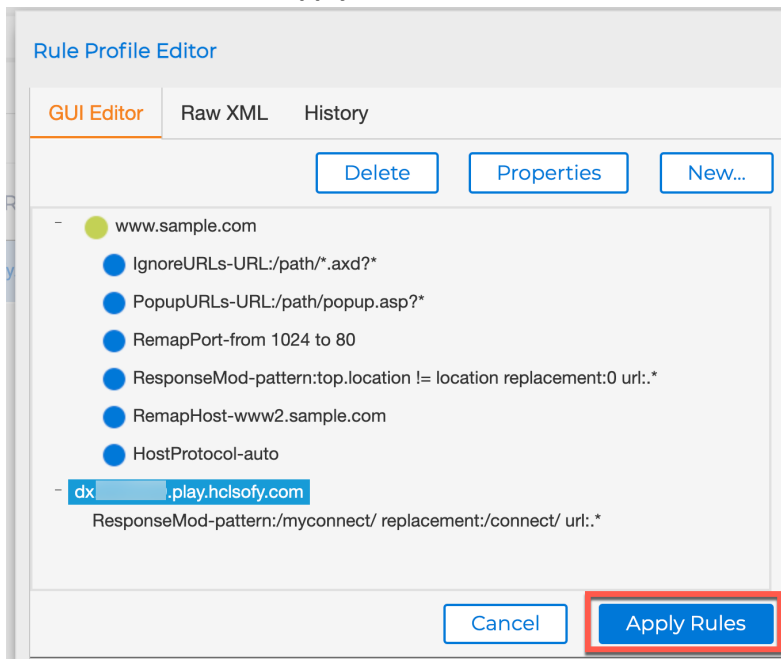
10. Then select your new host and click **New – Add ResponseMod**.



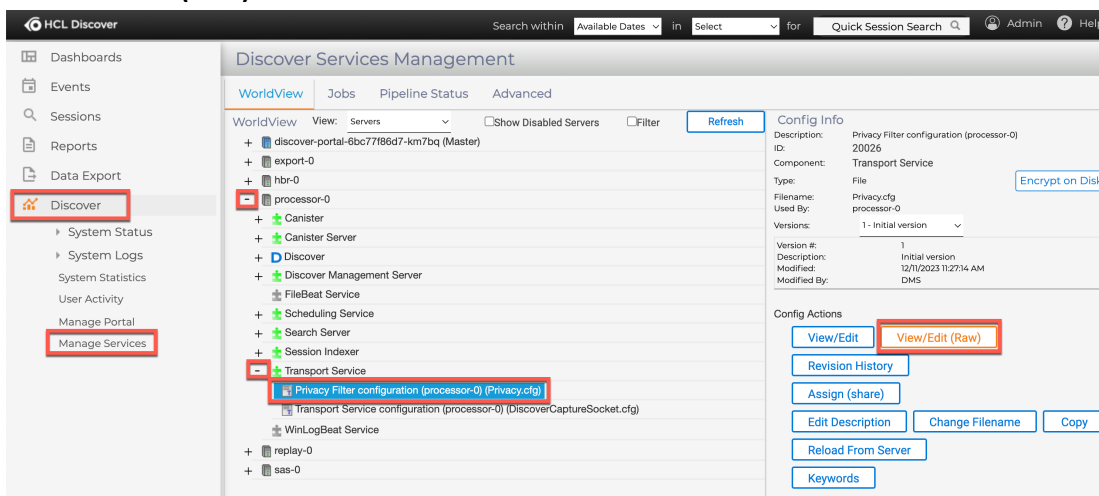
11. In **URL**, enter your HCL DX host or open it to all servers, using **.*** to work on all URLs and then enter **Pattern /myconnect/** and **Replacement /connect/**. Then click **Apply**.



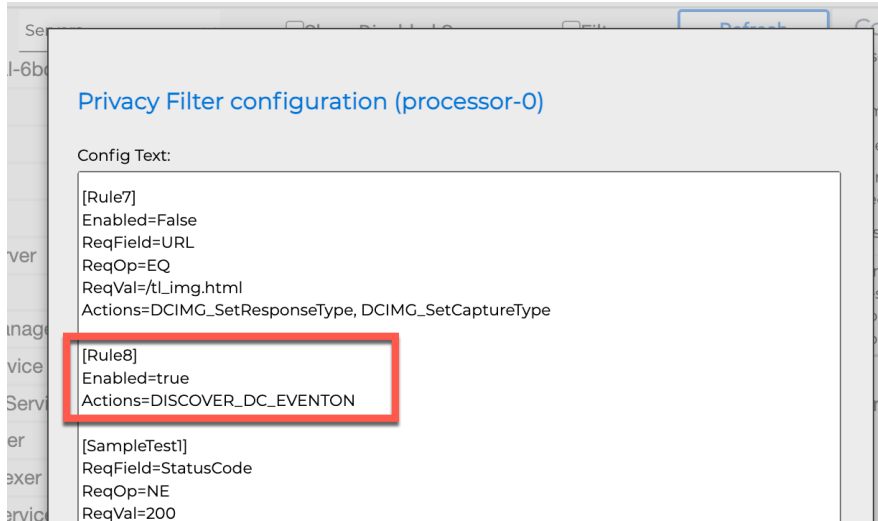
12. Then check it and click **Apply Rules**.



13. That’s it. It may take some time before this starts to work. If you want to create dashboards, you also need to enable the events. Go to **Discover – Manage Services**. Then open **processor-0, Transport Service**, click **Privacy Filter configuration (processor-0) (Privacy.cfg)** and **View Edit (Raw)**.

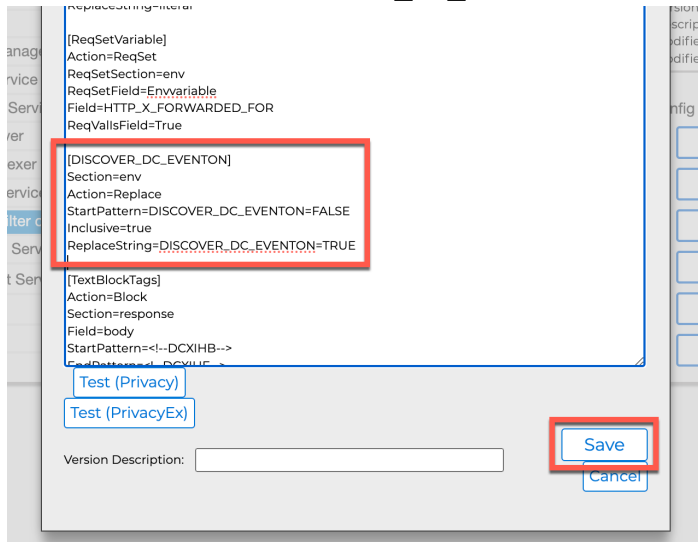


- Then add the following extra rule below the other rules to enable the DISCOVER_DC_EVENTON action:
 [Rule]
 Enabled=true
 Actions=DISCOVER_DC_EVENTON

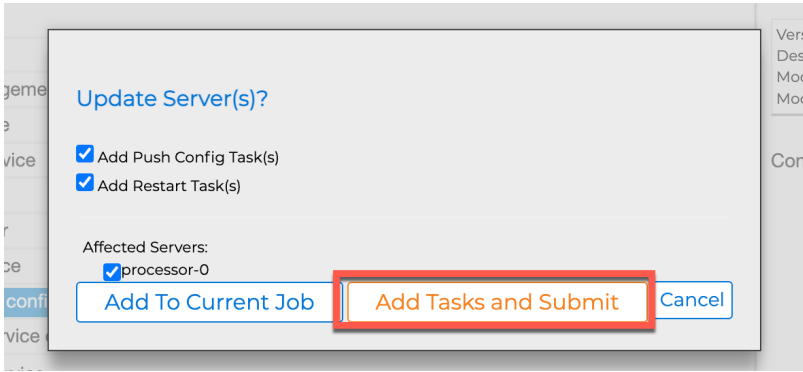


- Then scroll down and under the ReqSetVariable entry, insert the action details for DISCOVER_DC_EVENTON and click **Save**.

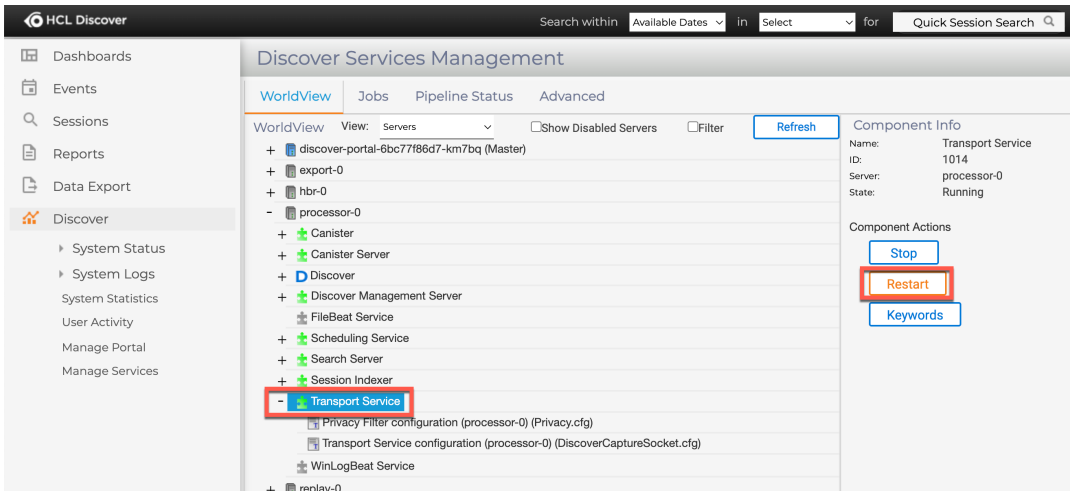
```
[ DISCOVER_DC_EVENTON ]
Section=env
Action=Replace
StartPattern=DISCOVER_DC_EVENTON=FALSE
Inclusive=true
ReplaceString=DISCOVER_DC_EVENTON=TRUE
```



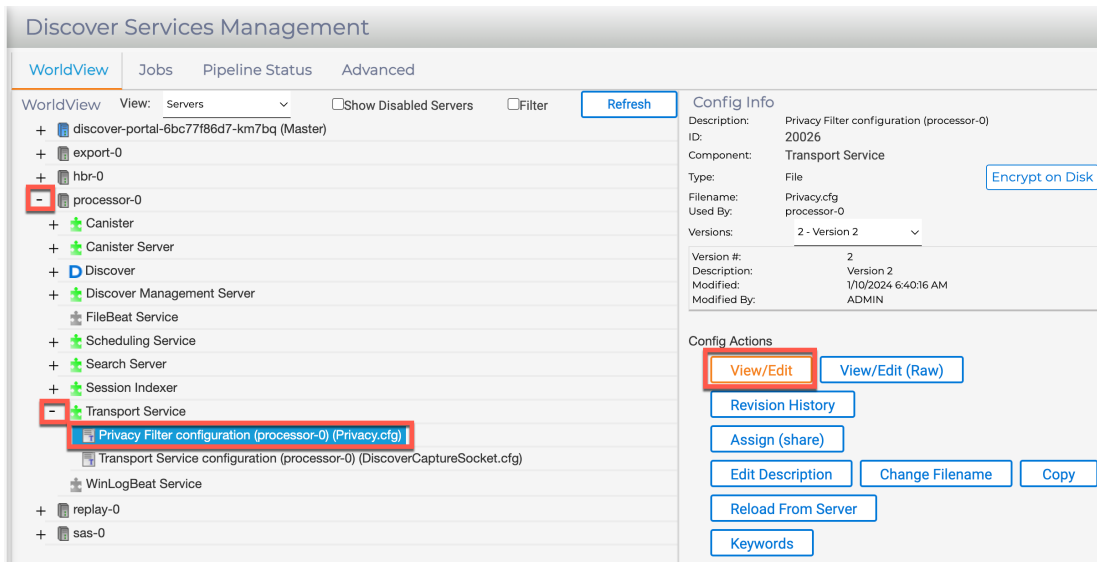
16. Then click **Add Task and Submit**.



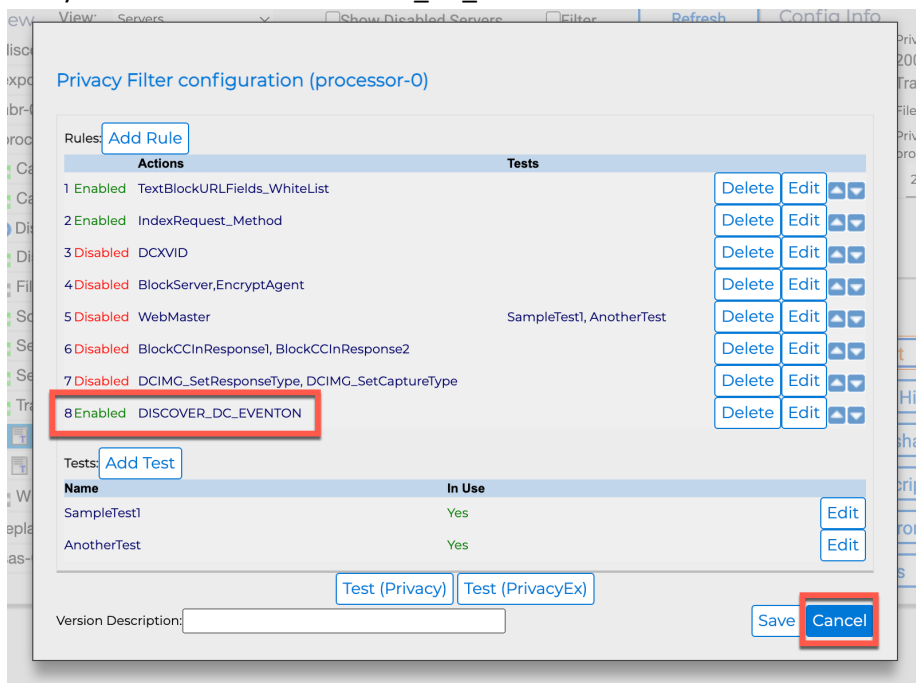
17. And restart the transport service. Click **Transport Service** and **Restart**.



18. Now check if it is correctly configured. Open the privacy configuration again. Click **processor-0 - Transport Service - Privacy Filter configuration (processor-0) (Privacy.cfg)** and **View Edit**.



19. And you should see the DISCOVER_DC_EVENTON enabled. Click **Cancel**.

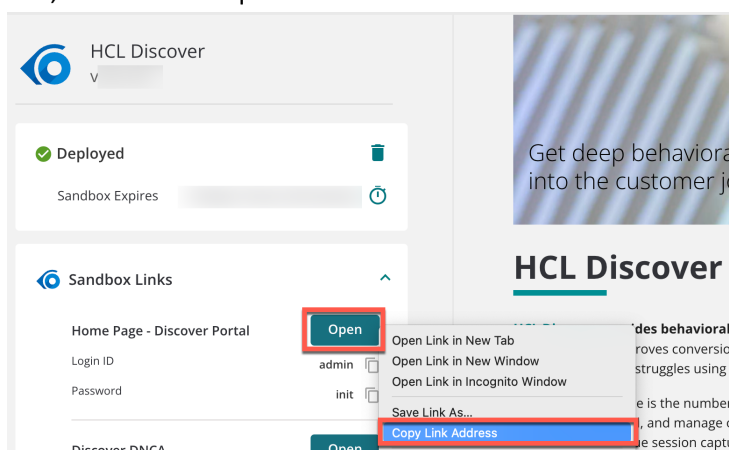


Congratulations! You have now learnt how configure HCL Digital Experience to work with HCL Discover to get more insight of the use of DX.

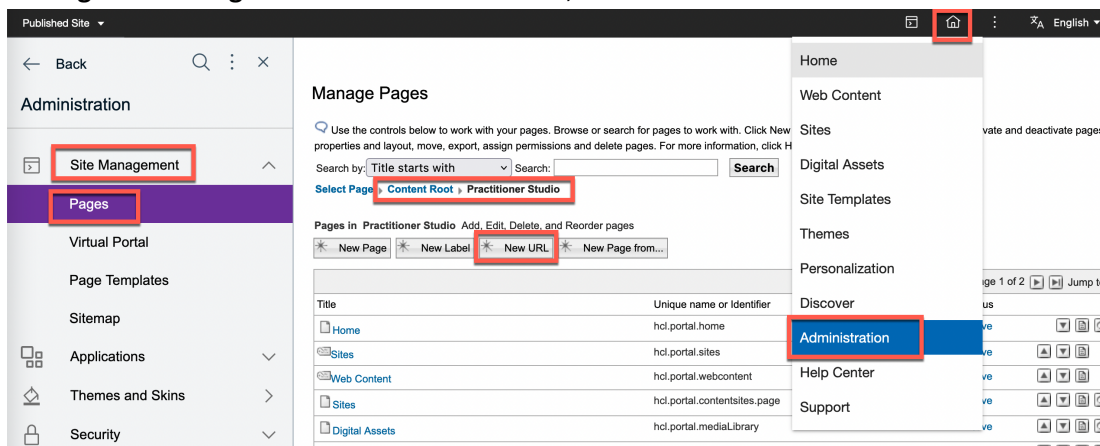
Optional Part 3: Integrate Discover in the Practitioner Studio

To allow administrators to access the Discover Portal – Home Page more easily, you may integrate access to it in the Practitioner Studio. This is managed with a URL page. These are the steps you will follow.

1. You first need to get the Home Page - Discover Portal URL. From the Discover SoFy Solution Console, open your HCL Discover sandbox and do a right click on the **Open** button for the **Home Page – Discover Portal** and click **Copy Link Address**. You may also open it directly, using the same **Open** and then connect using the **User ID** and **Password** shown. Please note this, as it will be required to connect later on.



2. Then connect to your DX instance and go to the **Practitioner Studio – Administration – Site Management – Pages** and select **Content Root, Practitioner Studio** and click **New URL**.



3. Give it the name and friendly URL name **Discover**, use an existing reporting icon **report_data.svg**, enter the Home Page – Discover Portal URL you just copied in the link field and click **OK**.

New URL: Practitioner Studio

Title:

Friendly URL name:

Icon:

Aggregation - Render Mode:
This setting will revert to SSA during runtime if the theme assigned with the page does not support CSA.

Inherit Parent Render Mode
 Client Side Aggregation - Rendering
 Server Side Aggregation - Rendering
 I want to make this page my private page

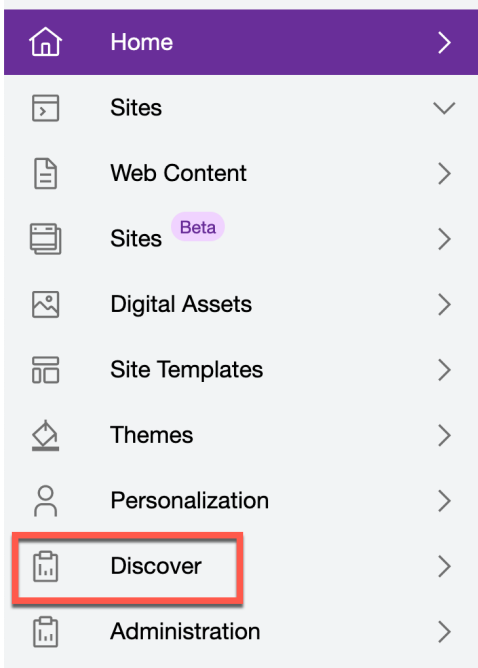
A link to the following portal page
Select a top level page:

Select a child page:

A link to a Web page with the following URL
 HTML

Page Cache Options

4. And then you should see it integrated. You may move it up and if you click it, it will open the Home Page – Discover Portal.

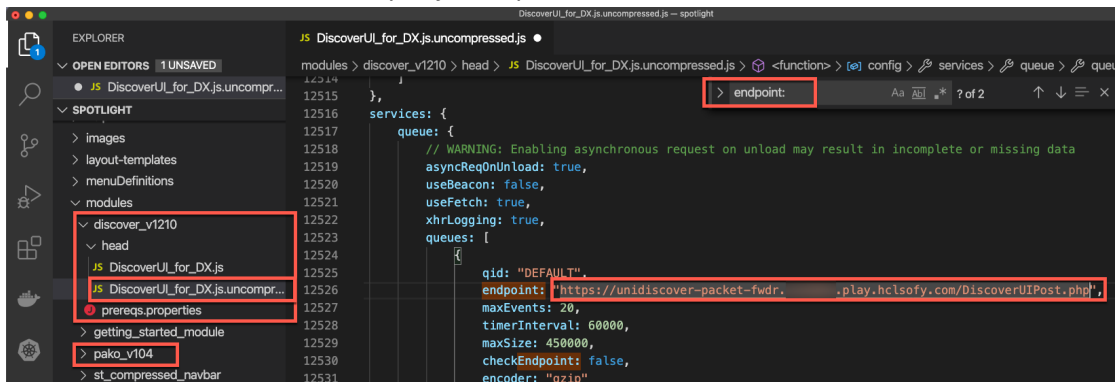


You have successfully integrated easy access to the Discover Portal – Home Page in the Practitioner Studio.

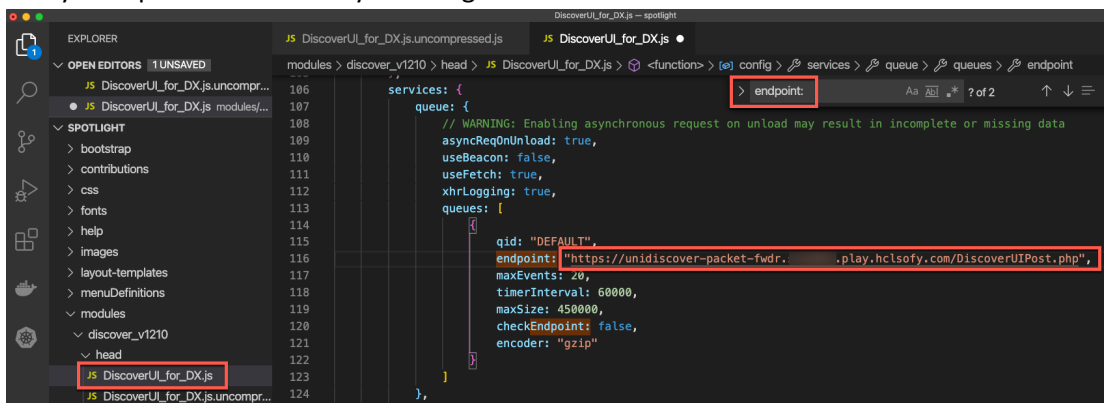
Optional Part 4: Setup HCL Digital Experience theme with Discover extension

Another way to configure HCL Discover with HCL Digital Experience is with theme modules. This gives you more granular control per page when to use it. In this part, you will update your theme to add the Discover modules and update the profile.

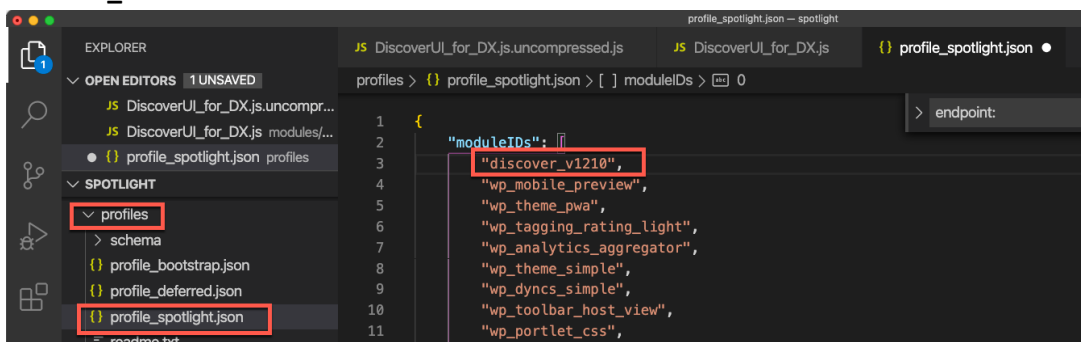
1. Use the instructions in Part 3 of Lab HDX-DEV-100 Theme Development (under <https://hclsw.co/hdx-dev-100>) to work on your theme. From your DX Solution Modules SoFy instance, choose the Spotlight theme. Then add the two modules **discover_vxxx** and **pako_vxxx** from the host of your DX server under *PortalServer/doc/discover* or get them from your unzipped lab files under the theme's modules folder. Then edit the **DiscoverUI_for_DX-js.uncompressed.js**. Search for **endpoint:** and change its entry to the Discover Packet Forwarder URL you just copied and save it.



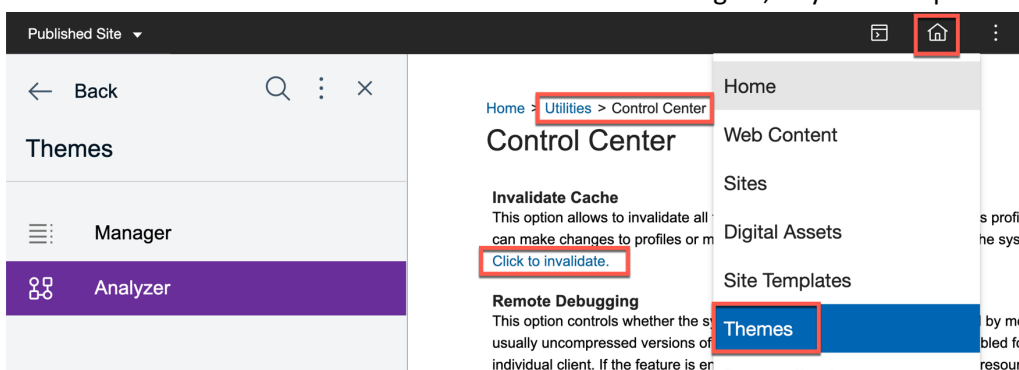
- Now you need to update the compressed version, **DiscoverUI_for_DX.js**, as well. You may either use a minifier, that can be installed as an extension, or update it manually. You will see that the services part in the DiscoverUI_for_DX.js is not compressed. Find that area again using a search on **endpoint:** and change the URL to your Unica Discover Packet Forwarder URL you copied before. **Save** you changes.



- Then update the profile(s) of the theme for the sites you want to integrate. In DX Demo this is the spotlight profile. Edit the **profiles/profile_spotlight.json** file and add on the top the module for Discover, which is named to that of the module directory, in our case **discover_v1210**.



- Save again and push the changes to your DX server. And then test it. First ensure, you clear the cache. Go to the **Practitioner Studio – Themes**, select **Utilities – Control Center** and under **Invalidate Cache** click **Click to invalidate** and test it again, as you did in part 1..



You have successfully deployed the Discover theme modules and added to your profile used by your pages.

Conclusion

Using this lab tutorial, you have configured HCL Digital Experience to integrate with HCL Discover and tested it.

You may use the Help Center to learn more details: https://help.hcltechsw.com/digital-experience/9.5/install/installing_the_unica_discover_module.html.

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>

Legal statements

This edition applies to version 9.5, CF215 of HCL Digital Experience and HCL Discover v12.1.10 and to all subsequent releases and modifications until otherwise indicated in new editions. It uses the DX Solution Modules with additional resources in HCL SoFy.

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