HCL Digital Experience

HDX-INT-BU DX Integration with HCL Discover for Business Users Lab

HCLSoftware U

Creating a new generation of experts

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Author(s)

This document was created by the following Subject Matter Experts:

Herbert Hilhorst
Company:
HCLSoftware

Bio

Herbert Hilhorst is an HCL Digital Experience (DX) Technical Advisor at HCLSoftware.

Contact: herbert.hilhorst@hcl-software.com

Introduction

In this lab, you will explore the integration of HCL Digital Experience with HCL Discover for different use cases, such as identifying struggles. You may use the Woodburn Stores business user lab to see how the struggles are discovered in HCL Discover, allowing you to take the right actions to provide the best experience to your users.

In this lab, you will play the roles of three users of the fictitious Woodburn Bank company.

Mandy Zhang, loyalty customer, based in Boston (USA)

As Mandy, a loyalty customer of Woodburn Stores, you will discover how the site adapts to your loyalty. You will try to make a new purchase and provide feedback on further improving the site.

Rose Bozli, Woodburn Stores Marketing Manager based out of Tokyo, Japan

Rose, the marketing manager of Woodburn Stores, is authorized to see others content to ensure the site is optimized for each member. She will use HCL Discover to see who are using the site, how it performs, identify and struggles and use Mandy's session details to better understand how she may optimize the site. She may also update the dashboard to show all bad promo codes.

Prerequisites

1. Completion of HDX-INTRO and HDX-BU-100 courses, including the labs, as this gives you a good idea on how DX works
2. A Discover instance and DX environment (using HCL SoFy DX Solution Modules https://hclsofy.com/catalog/dx-solution-modules) that has been set up, as documented in the Discover lab in HDX-INT-ADM

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 solution console>
Discover Login	admin	<from solution console>
Customer Mandy Zhang	mzhang	HCL-Dem0

Lab Overview

In this lab, there are two parts in this lab, shortly introduced now.

Part 1: Navigate the Woodburn Stores Site to Generate Analytics Data

You will first navigate the Woodburn Stores site as a loyalty customer, Mandy. This will produce analytics data that you may use to optimize the site.
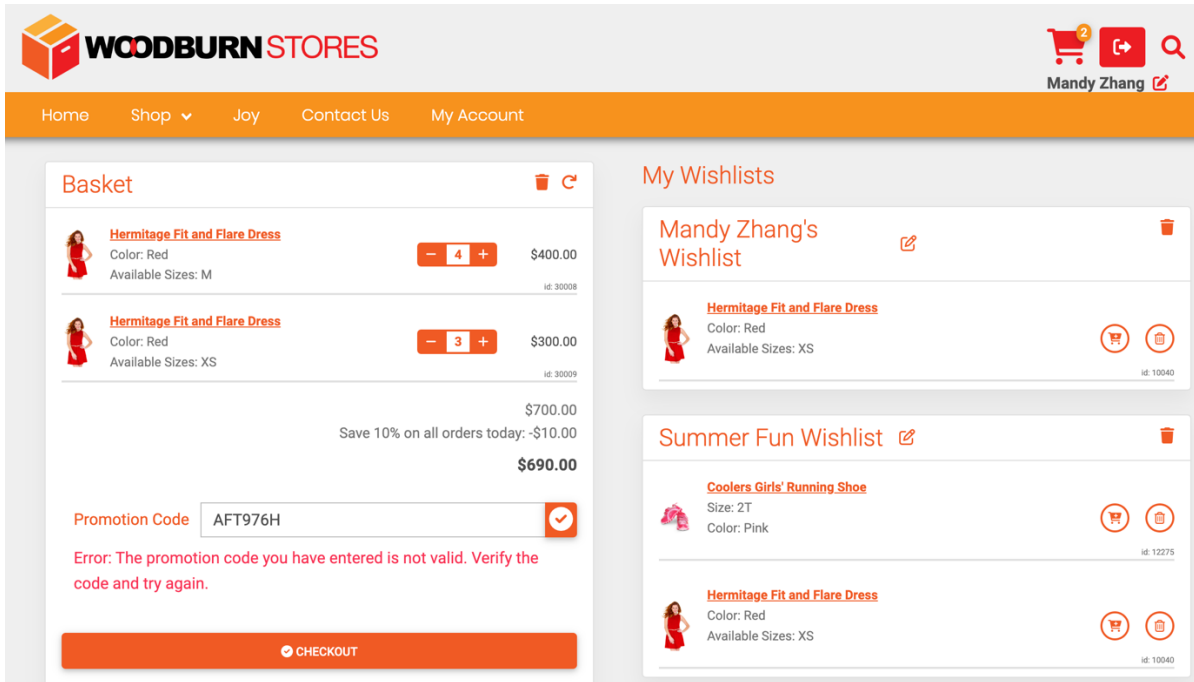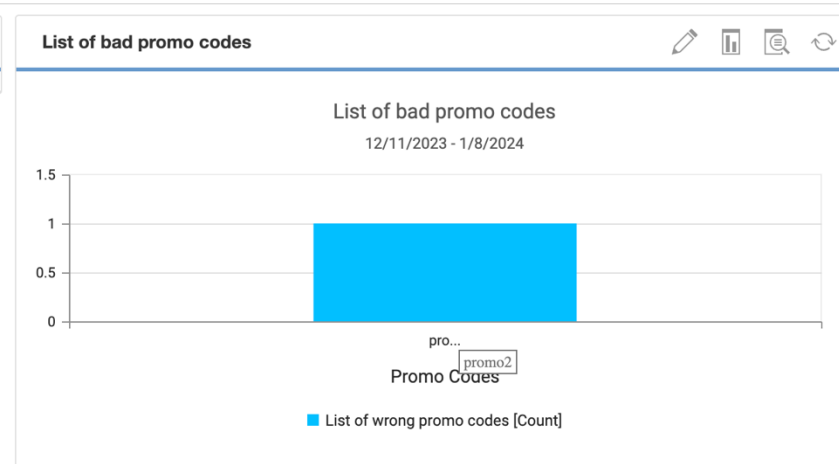

Part 2: Use Discover to Detect Optimizations

Then, as Rose, you will connect to HCL Discover to learn how well your site is running and identify potential areas of improvements. You will learn from Mandy's struggles and replay her session.

Optional Part 3: Check Bad Promotional Codes

Optionally, you may configure the Commerce dashboard to see what bad promotional codes have been used. You will create an event to capture all promo codes, then create a dimension for these promo codes to get a list of them. Then you create a hit attribute for bad promo codes, a report to create a list of bad codes, and then configure a Commerce dashboard component to show this report.

Part 1: Navigate the Woodburn Stores Site to Generate Analytics Data

You will first navigate the Woodburn Stores site as a loyalty customer, Mandy. This will produce analytics data that you may use to optimize the site.

1. Use part 2 of the Woodburn Stores lab from HDX-Intro DX in Action lesson where Mandy has struggles in using a promotion code and a check out button now working.
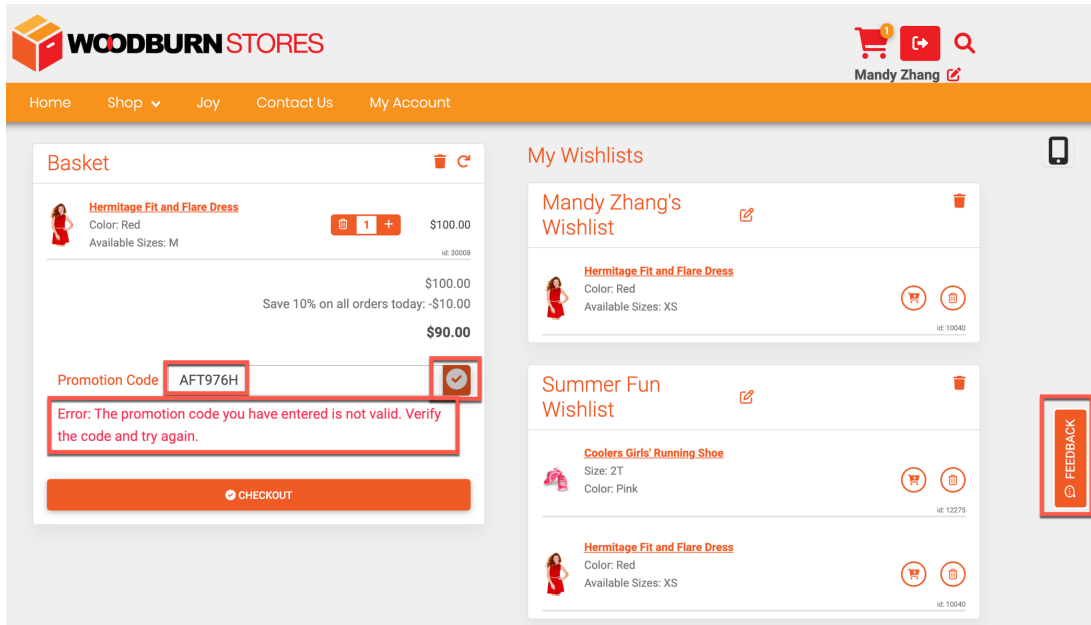
You have successfully visited the HCL DX Site and discovered a few struggles.

Part 2: Use Discover to Detect Optimizations

Then, as Rose, you will connect to HCL Discover to learn how well your site is running and identify potential areas of improvements. You will learn from Mandy's struggles and replay her session.

1. Open the HCL Discover console on your HCL SoFy instance. Check the login ID and Password and then click **Open** for the **Home Page – Discover Portal**.
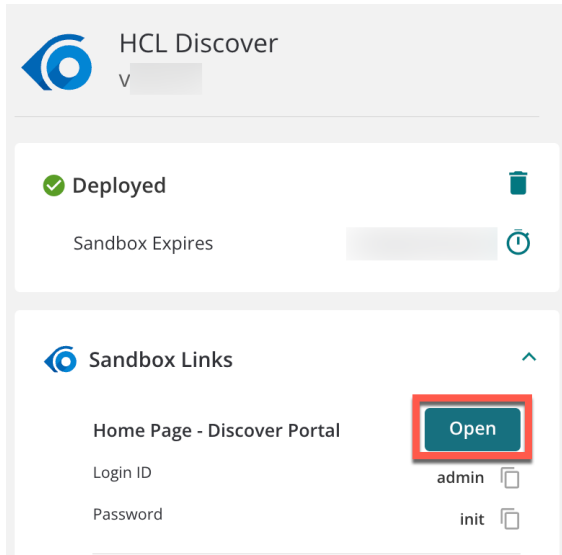
2. Then log in using this Login ID and Password. Enter **admin** as **Username** and **init** as **Password**. Then click **Login**.
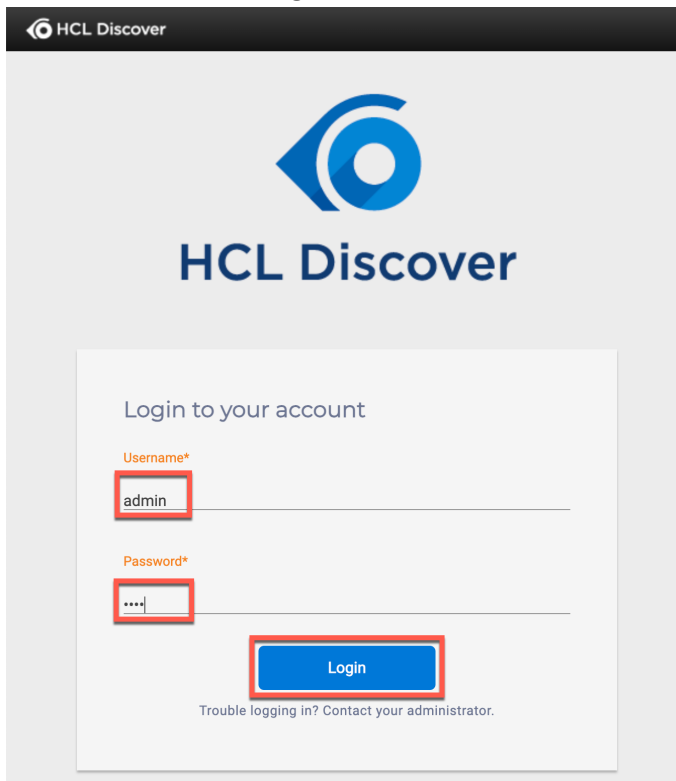
3. This gives you access to the Portal Management Administration. You have a look around on the options and use the Help to learn more on Discover. Then go to the dashboards. Click **Dashboards**.
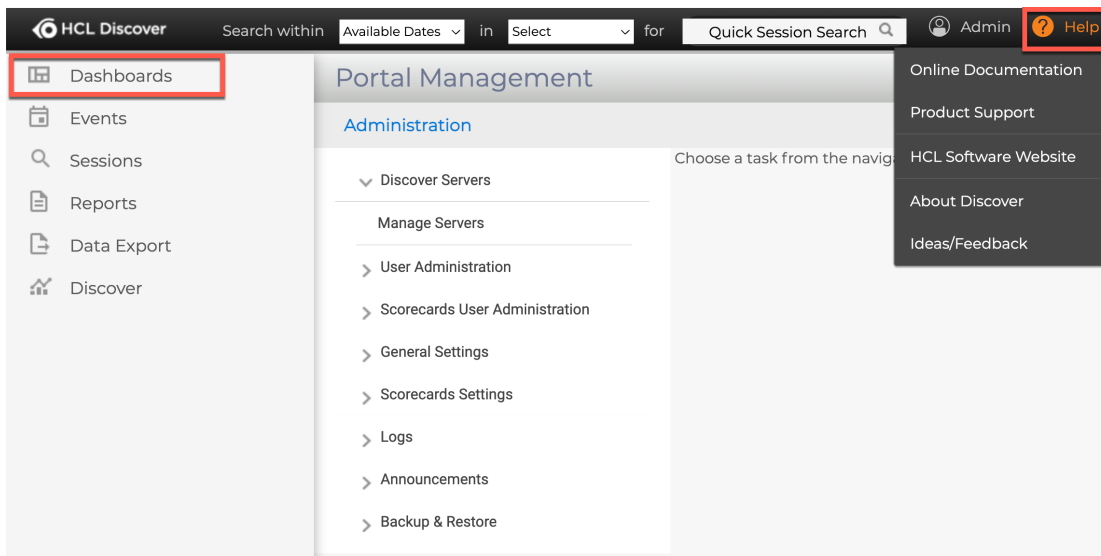
4. Then open the Technical Site Metrics dashboard. Click **Technical Site Metrics**. This gives you access to a dashboard with loads of sessions data. Have a look around. Then check the Performance Reports. Click **Performance Reports**.
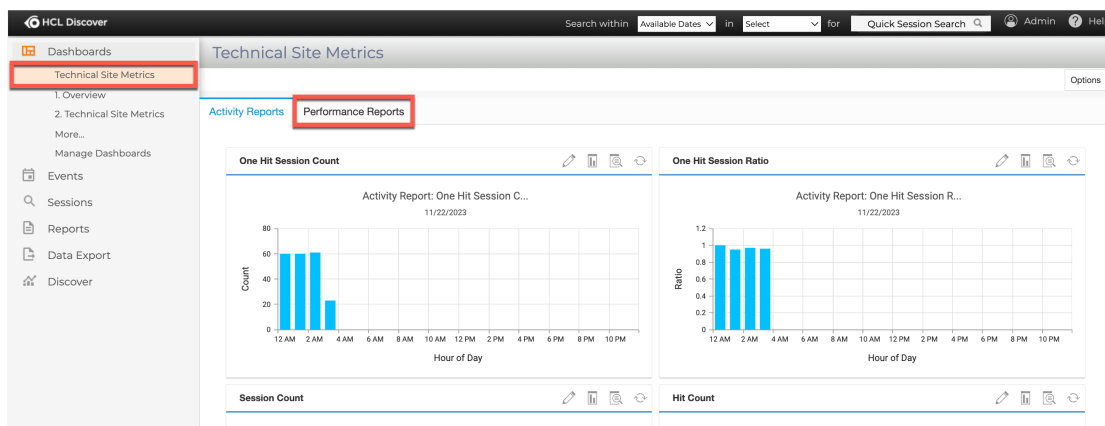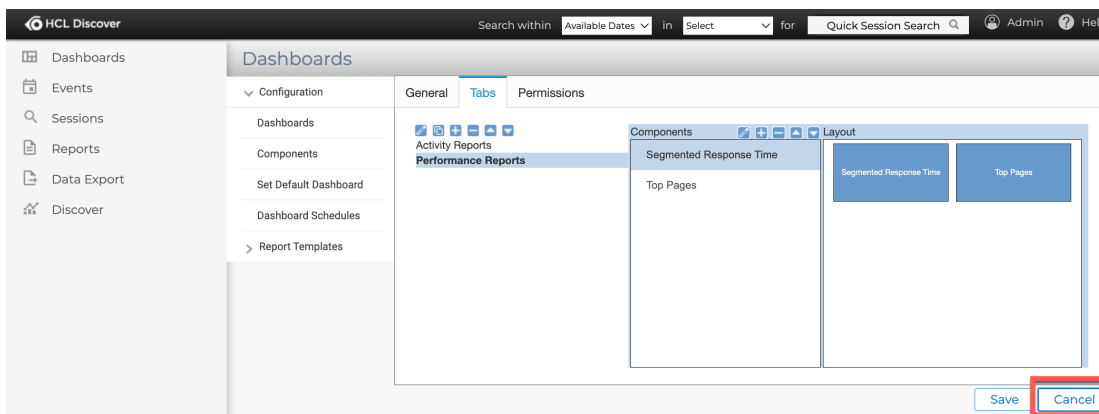

5. Notice you may modify each component in these reports. Click the **edit icon** for one its **Segmented Response Time** component.
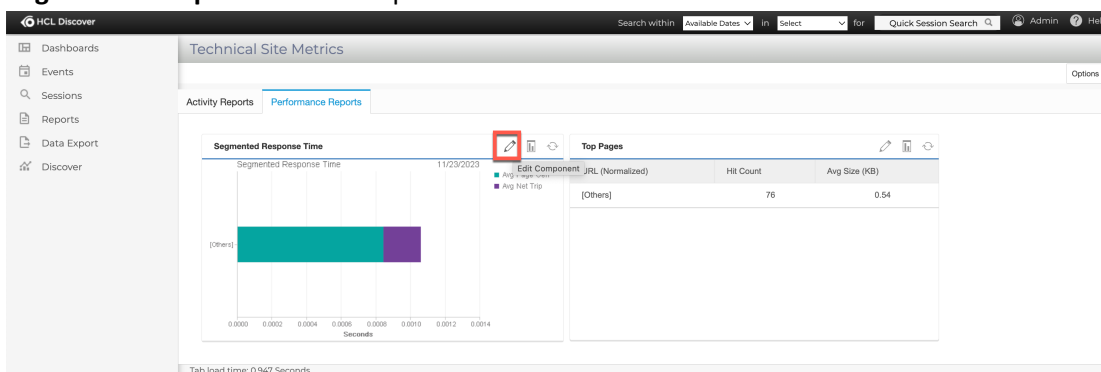
6. Notice all the options. Then close it. Click **Cancel**.
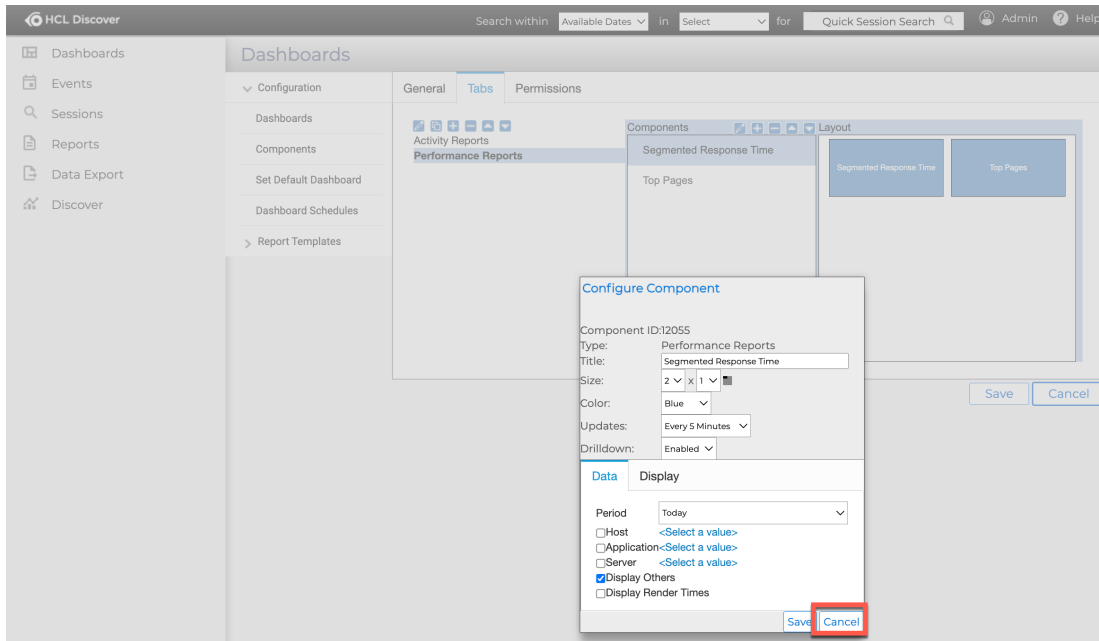
7. Notice the Activity and Performance Reports tabs and the options to configure what components to show in each of them. This allows you to fully configure it to your needs. Then click **Cancel**.

8. Then have a look at the overview dashboard. Open the **Dashboards** and select **1. Overview**. This gives you more information on the browser, referers, operating systems, device information and much more. Notice the additional dashboards for Commerce, Insights and Campaigns you may configure to better manage your site, e.g. to track potential loss of abandonned shopping baskets. Then go to check the session details of Mandy. Click **Sessions**.
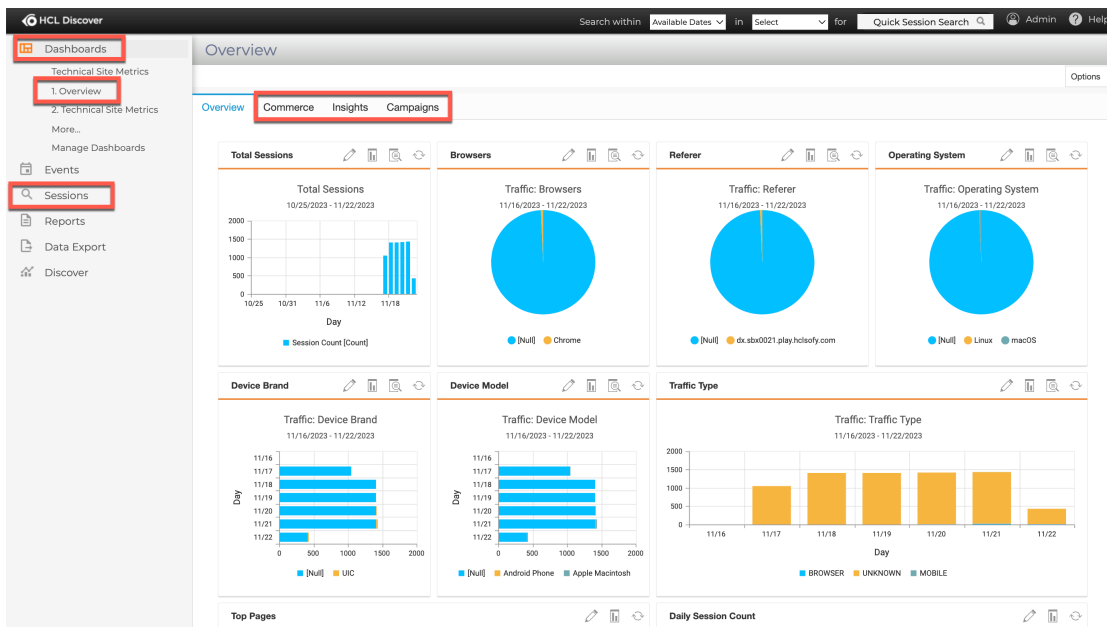
9. Then **Search All**.
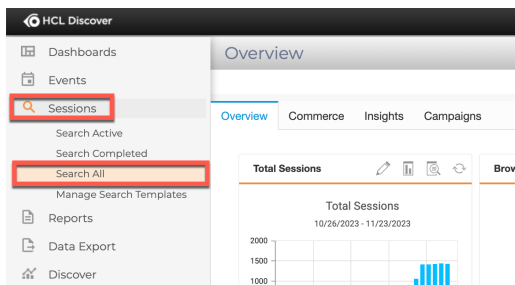
10. You are looking for the session of Mandy. Notice all options you have to find the right session. Then enter **mandy** and click **Search**.
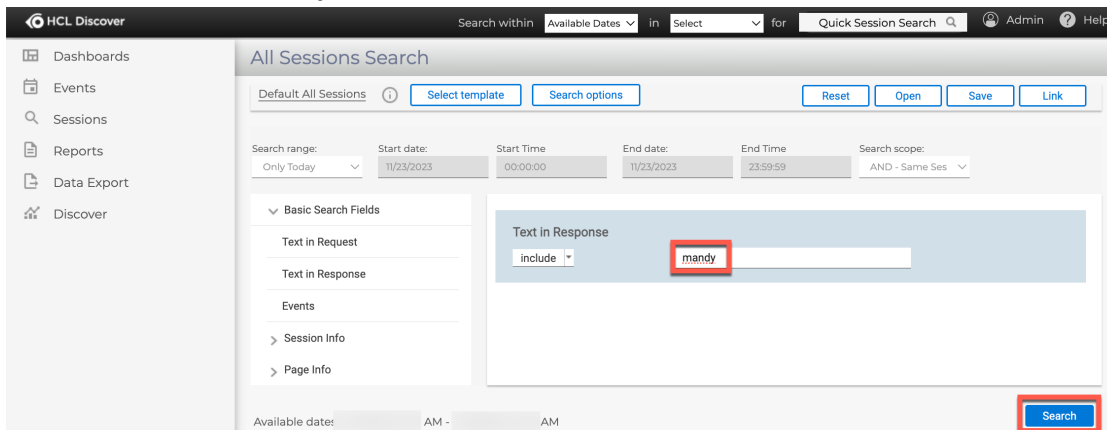
11. Here you see the session that Mandy recently run. To see the details of her session, you want to replay it. Click the replay icon.
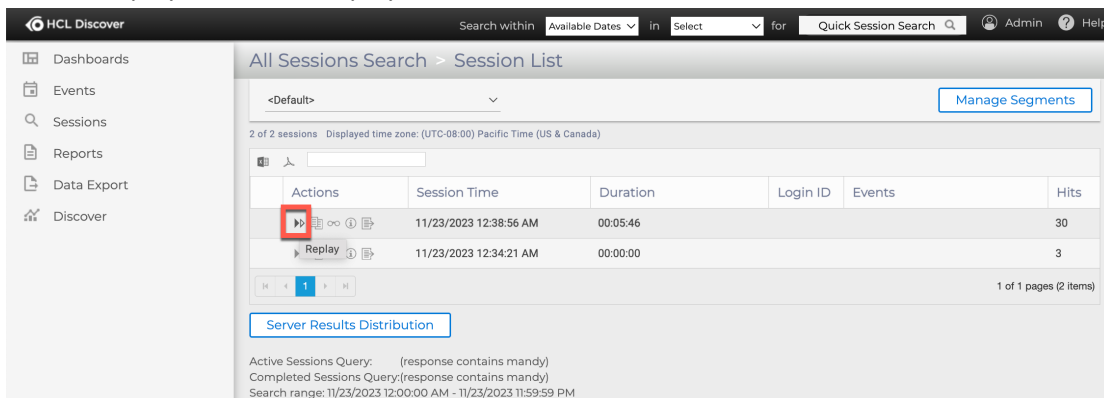
12. Then click **Advanced**.
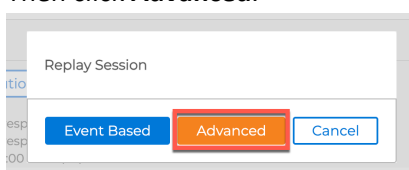
13. This opens a new page dedicated to the replay of this session. It shows the first page of the session and all the pages that have been accessed during the same session. Click on the next page in the Navigation to see she has logged in.
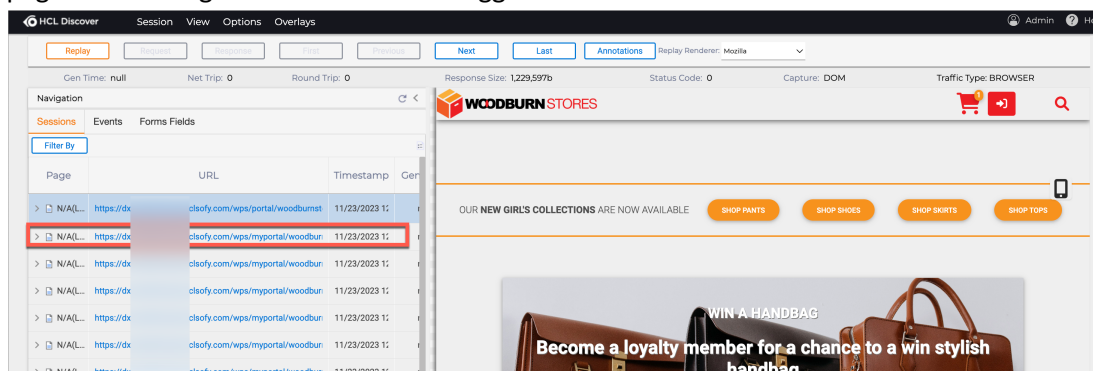
14. You see that her home page changed. Then go the last page where you had the struggles. Click the last page in the Navigation.
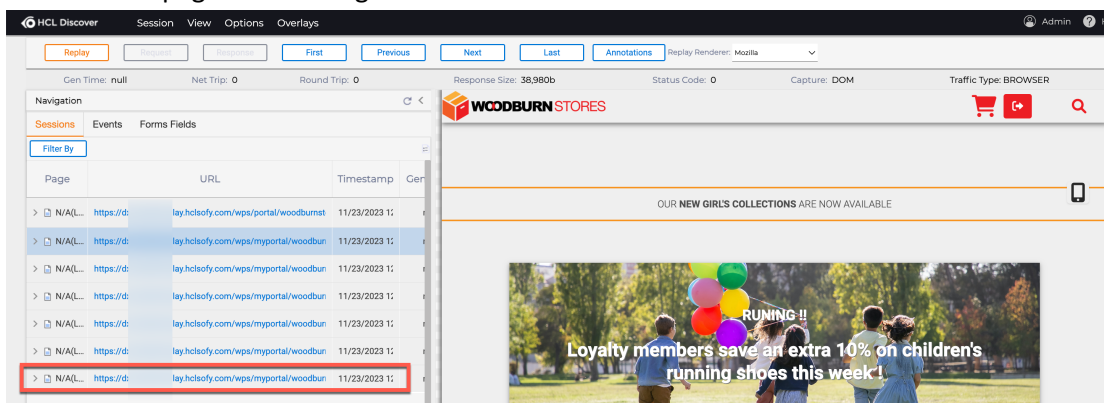
15. This shows the last page where she has tried the promotion code and clicked the Checkout button. You will see how she gets to this last part. Click **Next** twice.
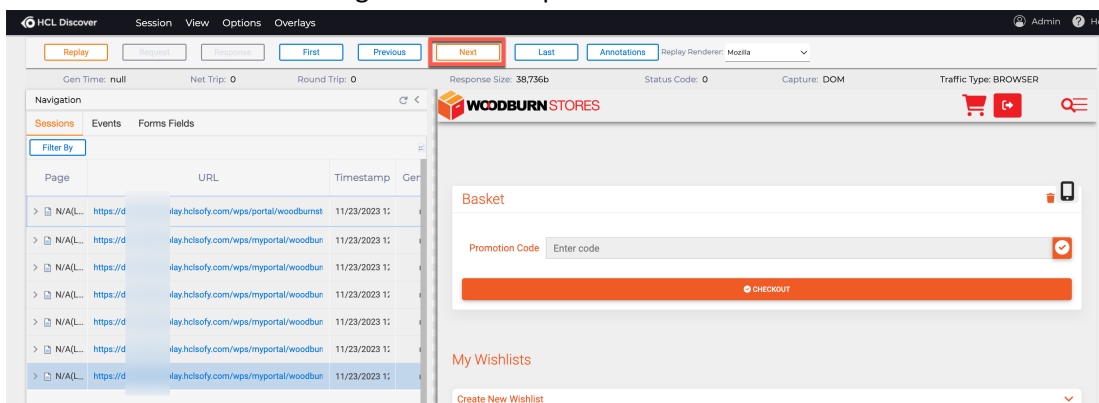

16. This expands the page in the Navigation and brings you to the time when Mandy entered the Promotion Code. Click **Next** again.
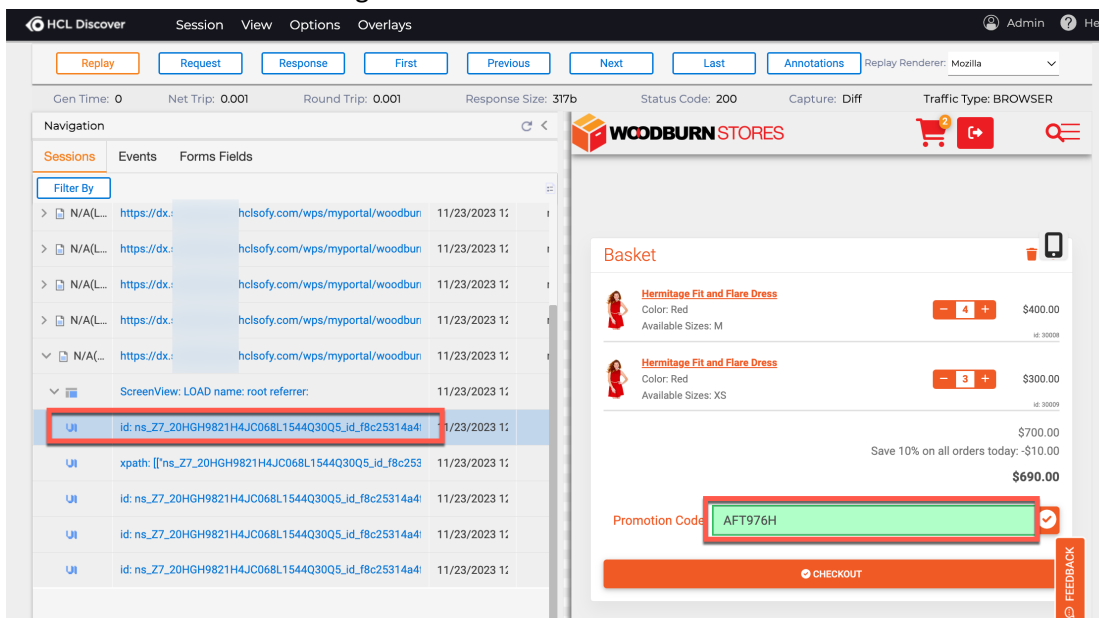
17. Notice she now clicks the Promotion Code validation button. Click **Next** again.
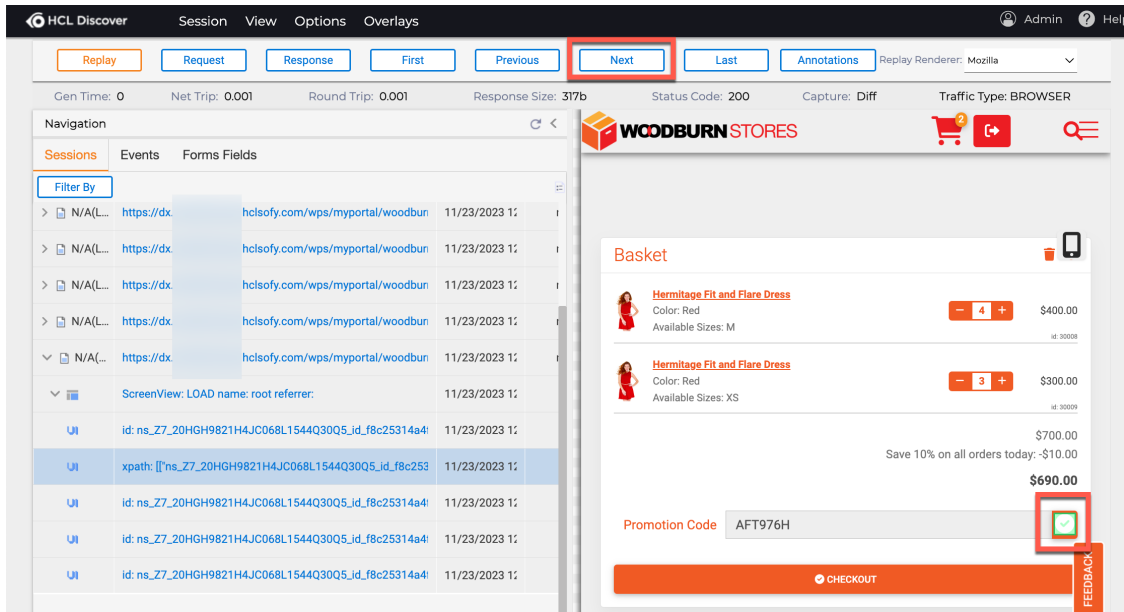
18. She gets the message that the code is not valid and then clicks on the Checkout button. This has allowed you to see what issues Mandy had and you may now work with your team to get this corrected.
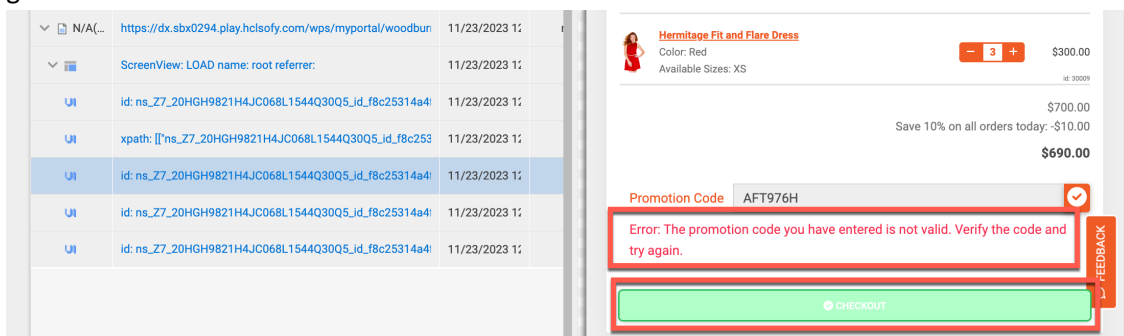
19. Notice also the different overlays that may be selected, e.g. to show a heat map. This is currently not configured.
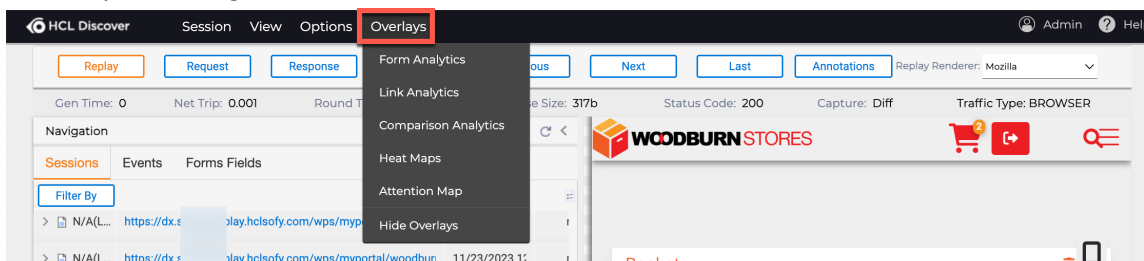

You have successfully used HCL Discover to optimize your HCL Digital Experience site.

Optional Part 3: Check Bad Promotional Codes

Optionally, you may configure the Commerce dashboard to see what bad promotional codes have been used. You will create an event to capture all promo codes, then create a dimension for these promo codes to get a list of them. Then you create a hit attribute for bad promo codes, a report to create a list of bad codes, and then configure a Commerce dashboard component to show this report.

1. Go back to the session replay and find the place where the promotion code was entered, showing it in green. Then click **Request**.
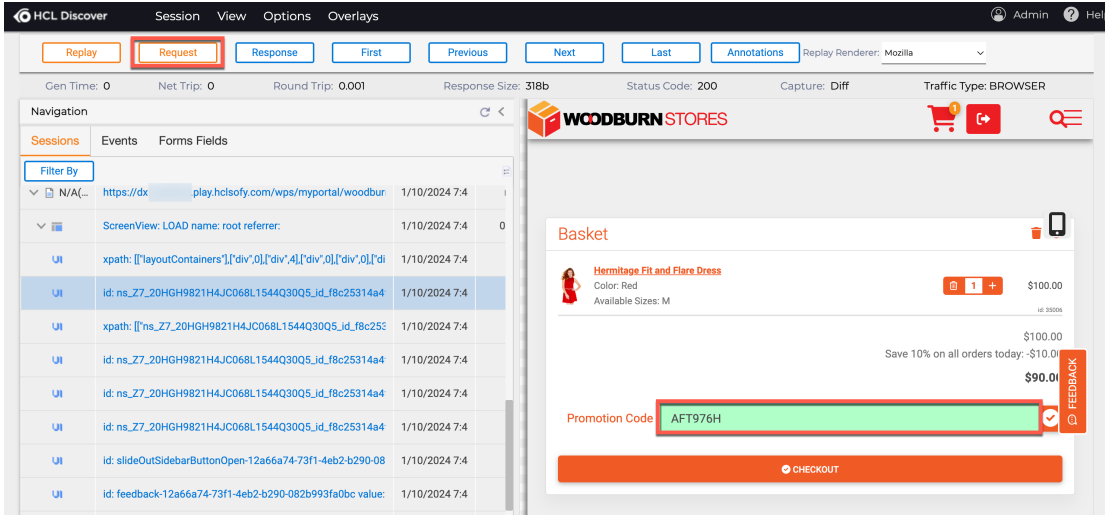
2. Then click **Click here to view Step Attributes**.
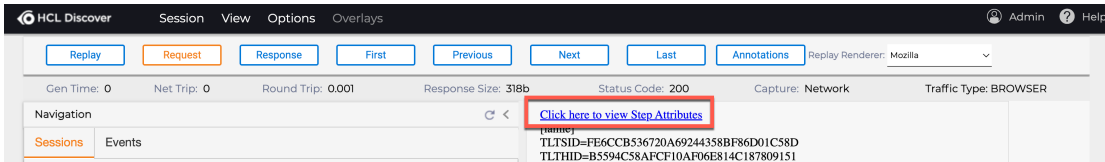
3. Then search for the Promotion code entry, search for **AFT976H** and then look for the event of this. Do a right click on the **id** of this event and click **Create New Event from the Step Attribute selection**.
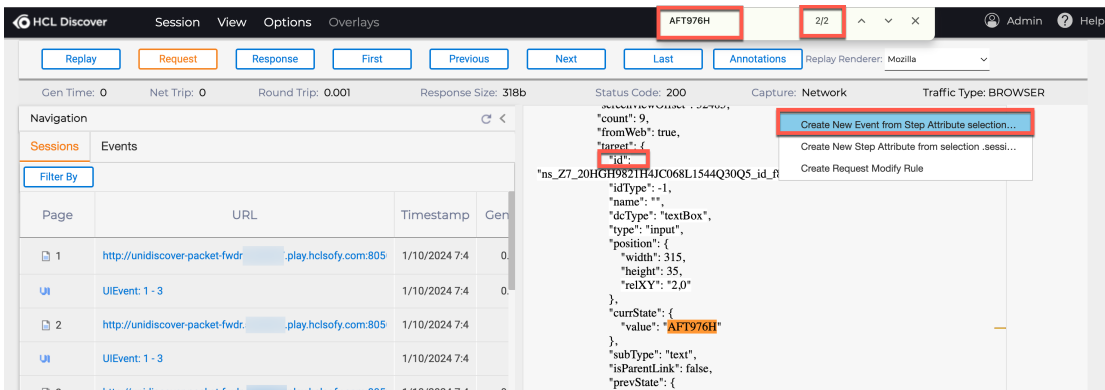
4. You first need to give this the right type, which is a text value. Under **Hit Attributes**, search for **type**.
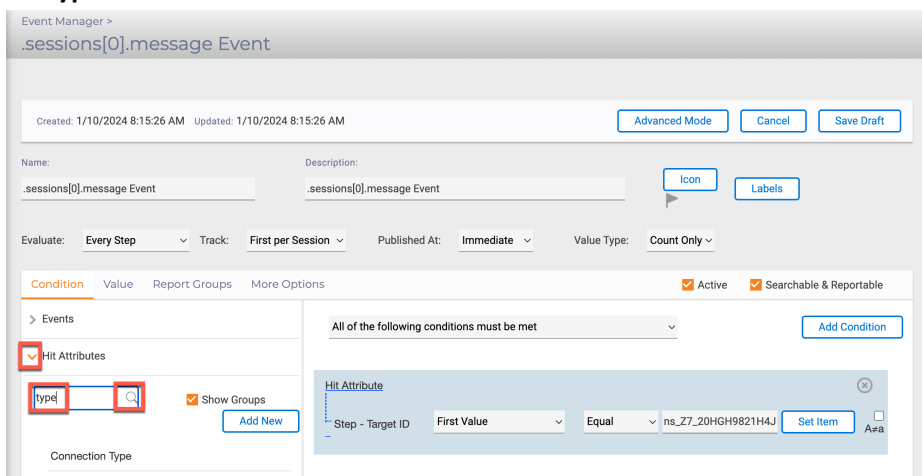

5. Select the **Step – Event Type** and then open the **Hit Attribute Found** to change this to **First Value**.
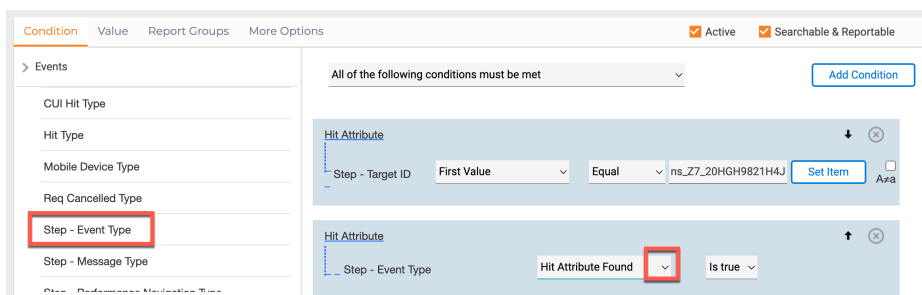

6. The event you are trying to capture is the onChange event in the web page. Therefore, you need to set the value to **change**. Then give it an easy to remember name, like **Get Promo Codes** and change its **Value Type** to **Text**.
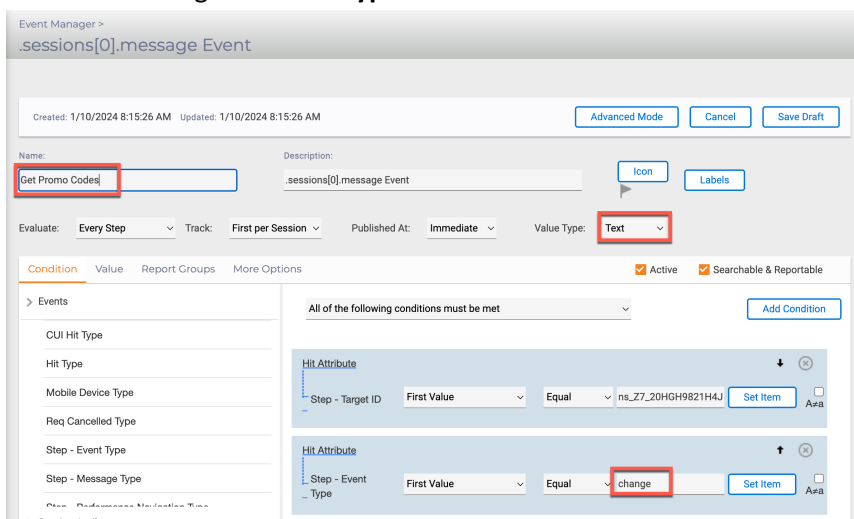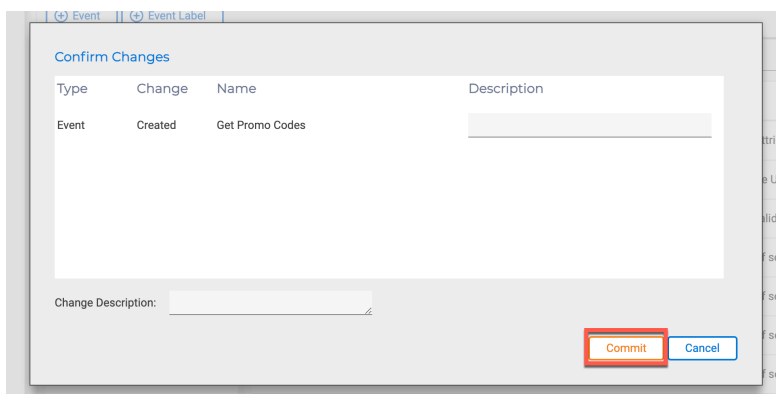
7. Then set it to the value you just selected. Select **Value**, open **Hit Attributes**, search for **value** and select **Step – Target Current Value**. Then save it, click **Save Draft**.
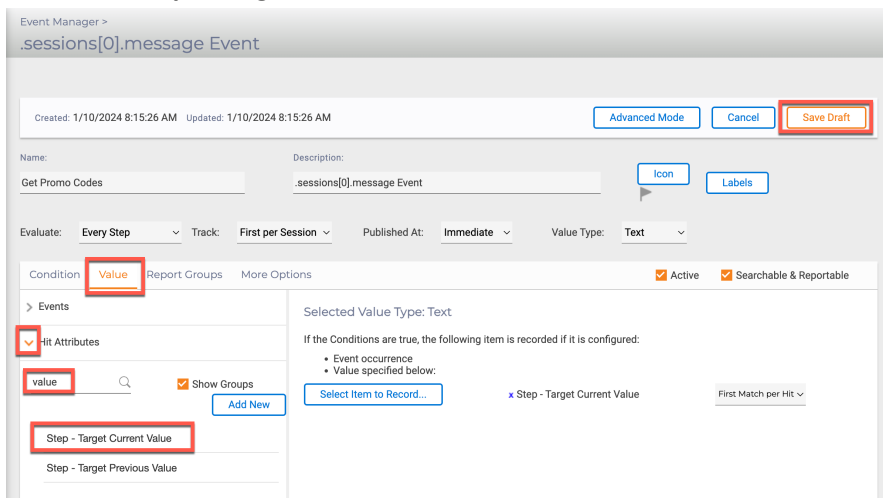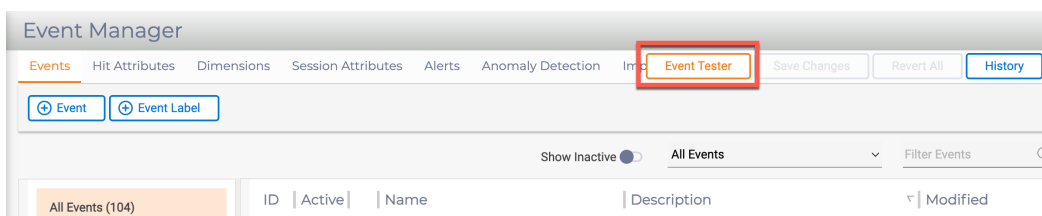

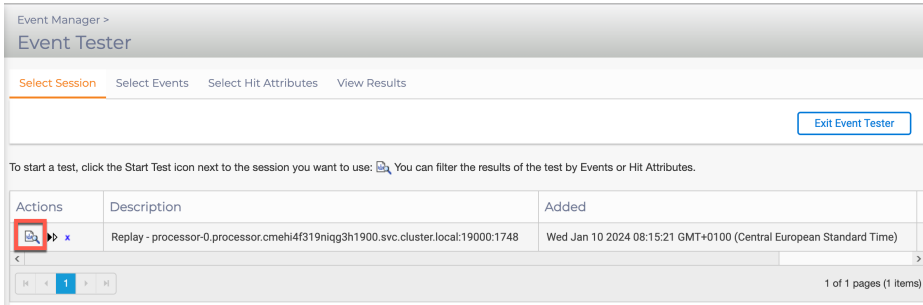8. Then commit these changes. Click **Save Changes**.
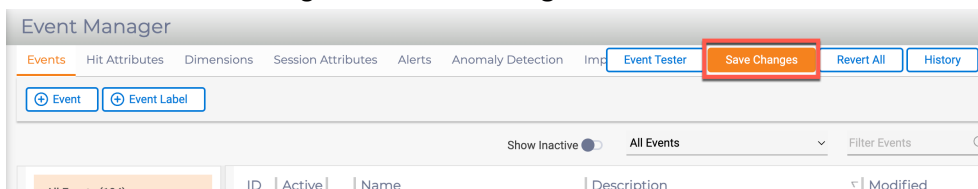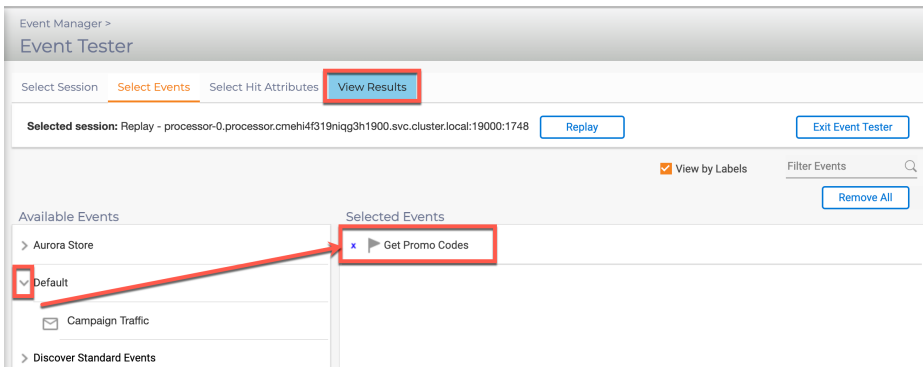

9. Double check and click **Commit**.

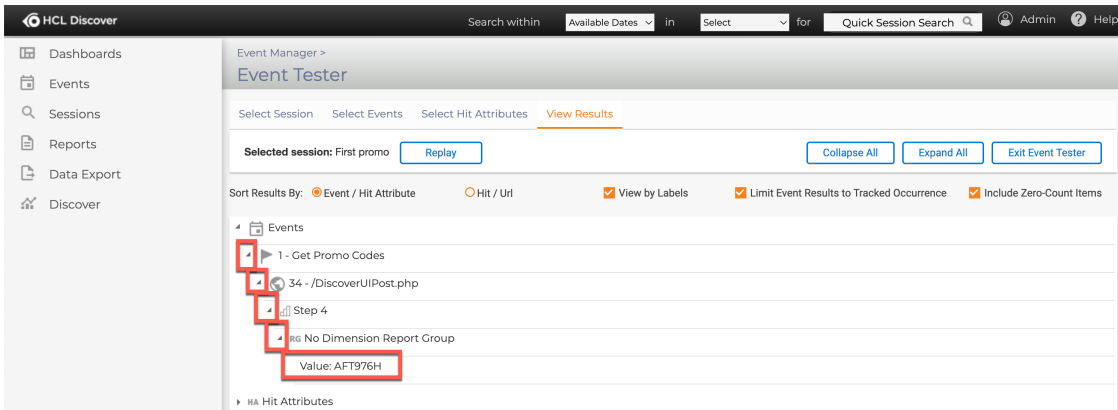10. Now test it. Go to the event tester. Click **Event Tester**.

11. And click the view event icon.

12. Then from the **Default** available events, select your new **Get Promo Codes** and click **View Results**.
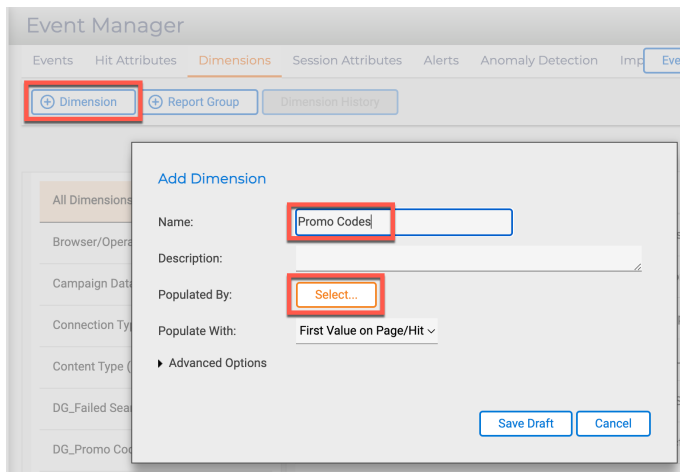

13. Then expand the **Get Promo Codes** and you should see the value of the promotion code your user has enter, here **AFT976H.**
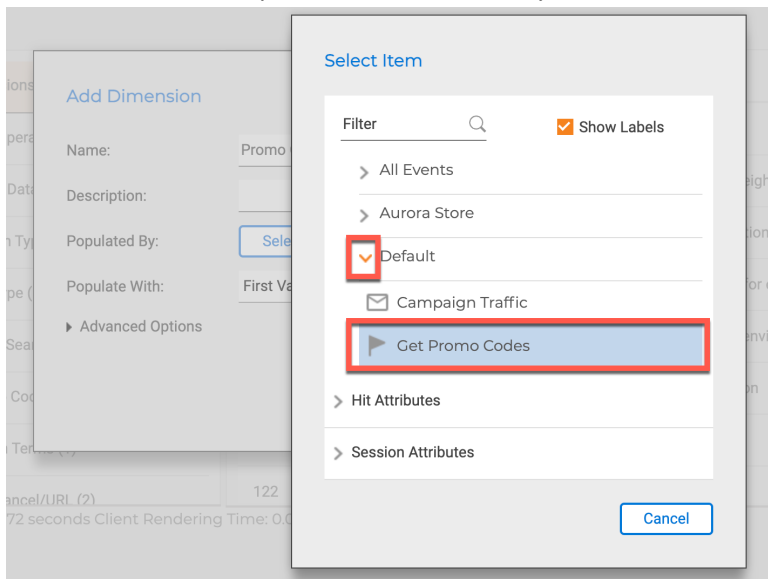

14. Then you need to create the dimension for Promo Codes to put them into a list. Open the Event Manager. Click **Events** – **Events Manager** and then **Dimensions**.
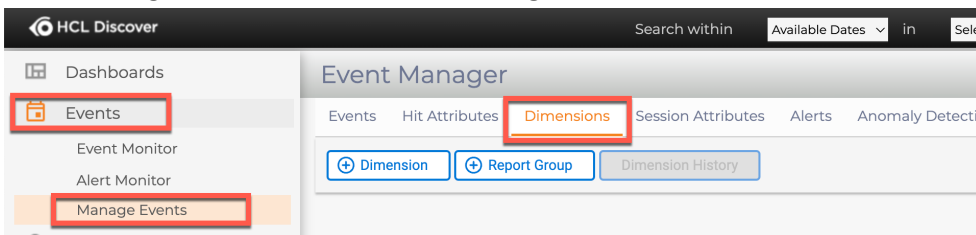
15. Then create a new dimension. Click **Dimension** and name it **Promo Codes**. Then click **Select...**

16. Then select **Events**, open **Default** and select your **Get Promo Codes**.

17. You may have a look at the advanced options. You do not need to change them. Then save it. Click **Save Draft**.

18. Then click **Save Changes** and **Commit**.

19. Now you need to create your hit attribute for your bad promo codes. Go back to the session replay, in the other browser tab, and find the place where the promotion code was entered, showing the error for wrong promotion code.
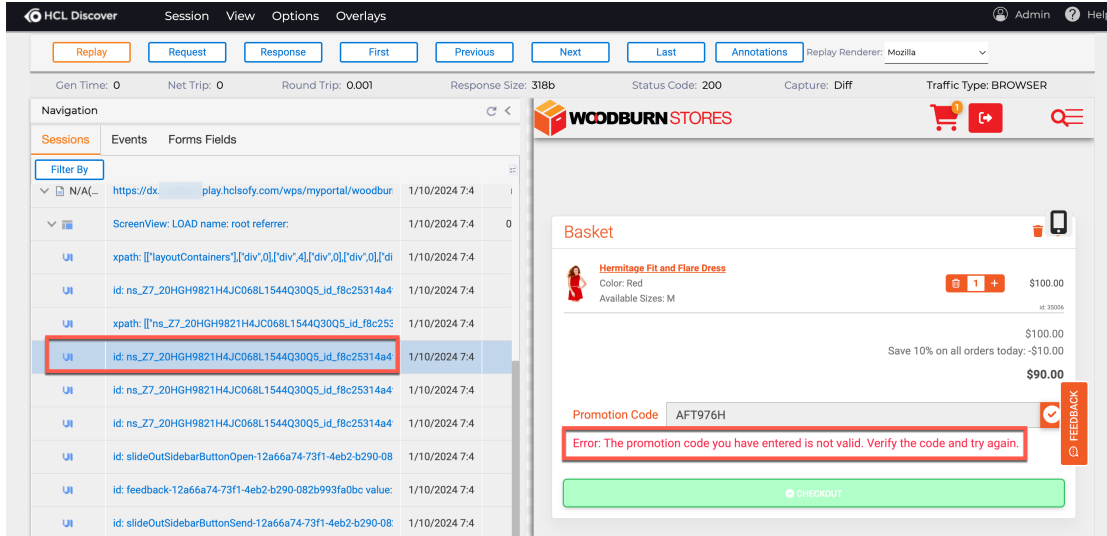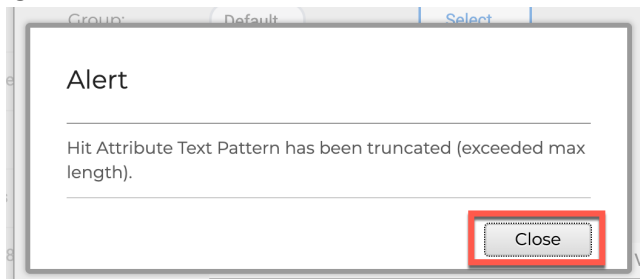

20. Then select this error message: **Error: The promotion code you have entered is not valid. Verify the code and try again**. and right click **Create New Hit Attribute from "Error: The p…'**.
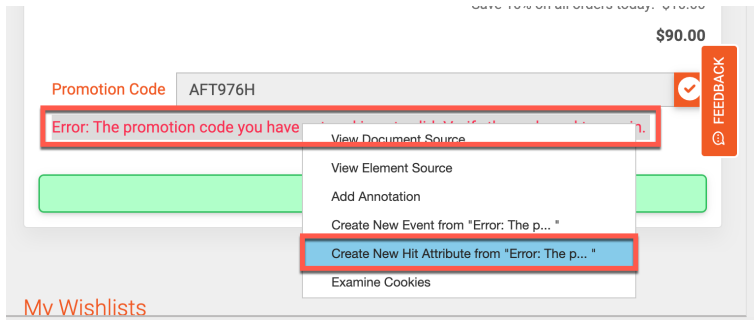
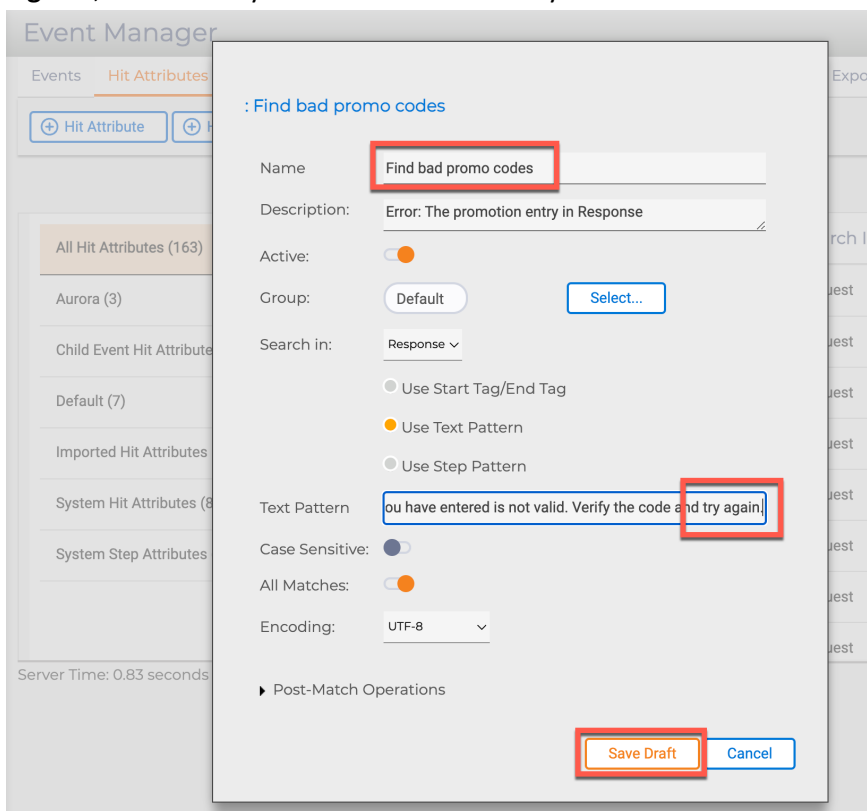
21. Don't worry about the message. Click **OK**.
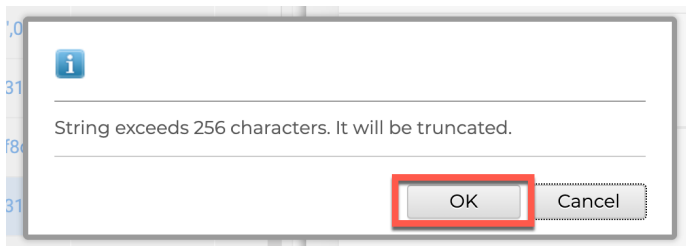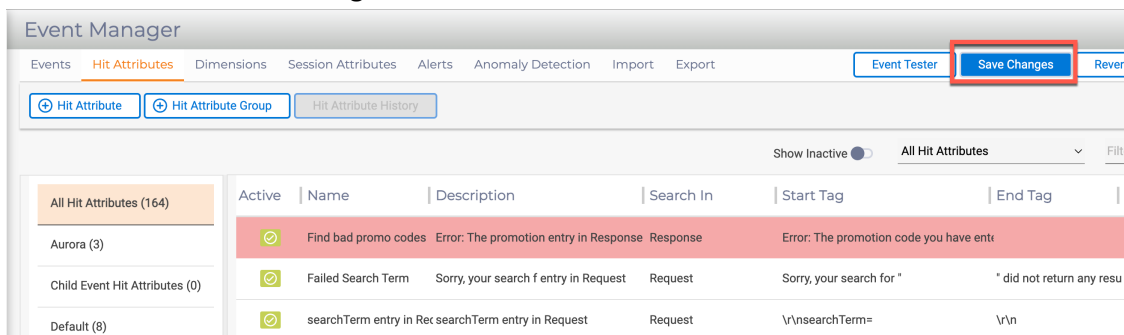

22. Ignore the alert and click **Close**.
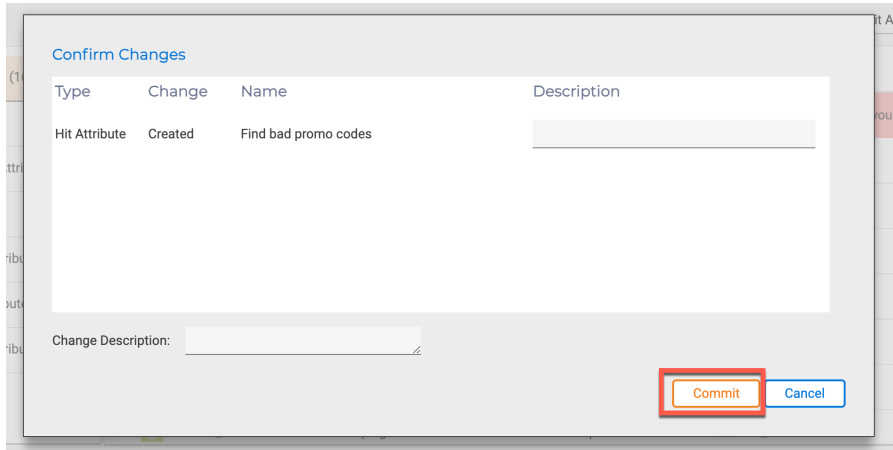
23. Then update the name, e.g. to **Find bad promo codes**, check the **Text Pattern** ends with '**again.**', as there may be additional text here you need to remove. Then click **Save Draft**.
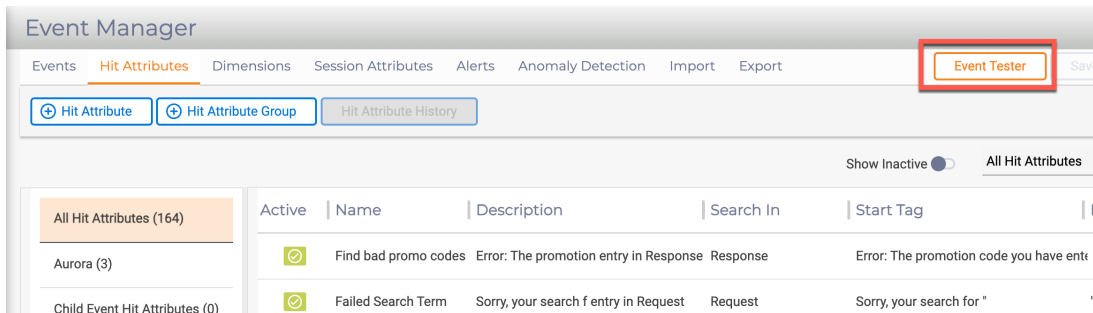

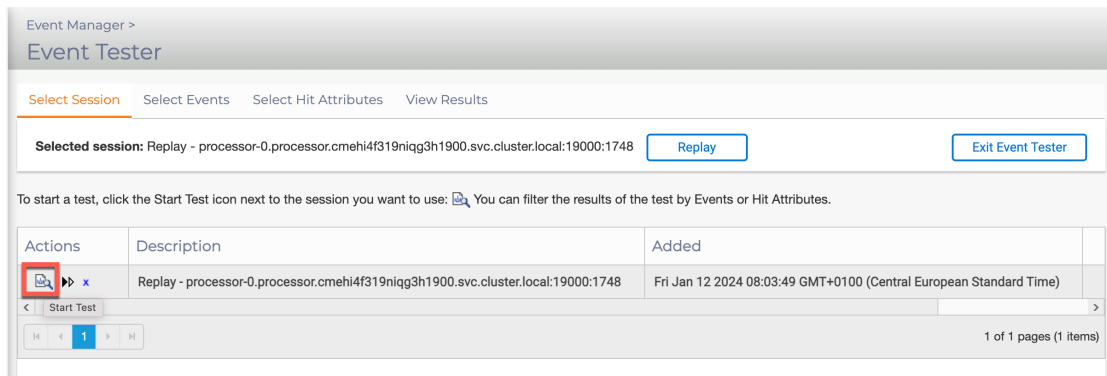
24. Then save it. Click **Save Changes**.

25. And click **Commit**.

26. Then go to the event tester. Click **Event Tester**.

27. And start the test. Click the **Start Test** icon.

28. Then add the Find bad promo codes hit attribute to your selected Get Promo Codes under Select Events. Click **Select Hit Attributes** and under **Default Available Hit Attributes**, select your **Find bad promo codes** attribute and then click **View Results**.
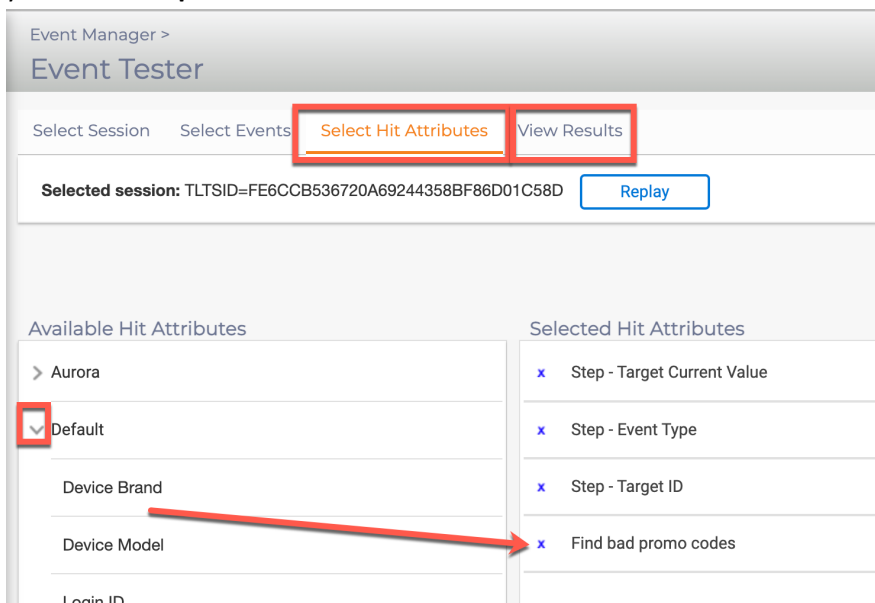
29. Expand your event and you should see the promo code your user used. Now you need to turn this into a new event. Click **Events** and **Manage Events**.
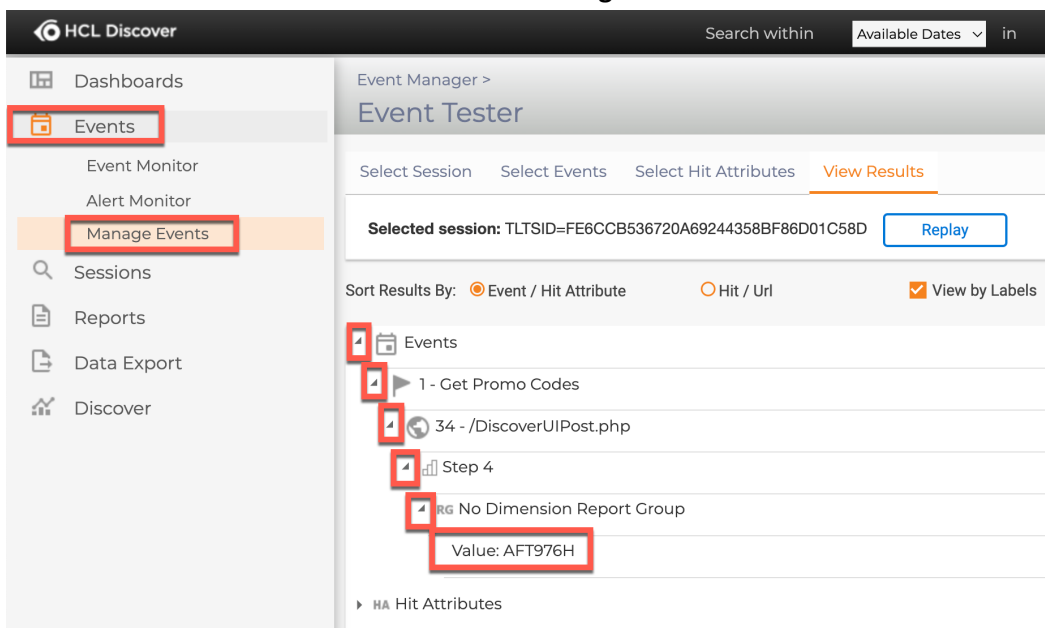
30. Then create a new event. Click **Event**.
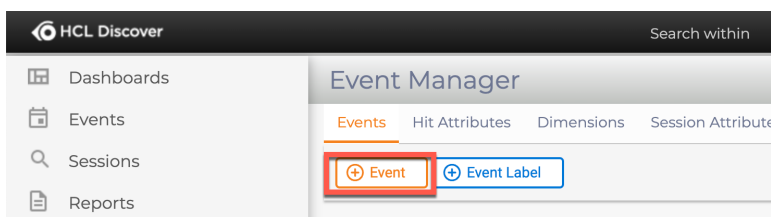
31. Name it **List of bad promo codes** and under Hit Attributes search for promo and select your **Find bad promo codes**.
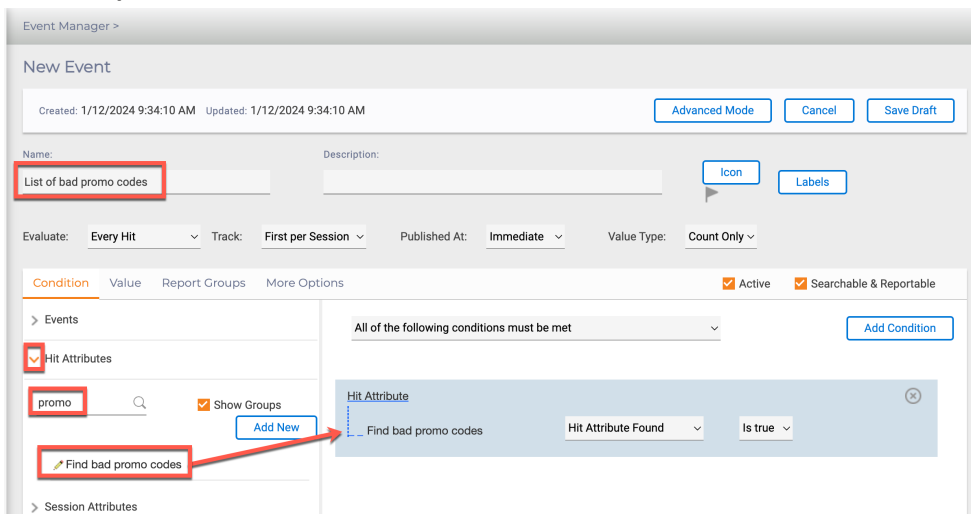
32. Then add your Promo Codes dimension. Click **Report Groups**, search **promo** under **Dimension** and select **Promo Codes**. Then click **Save Draft**.

33. Click **Commit**.
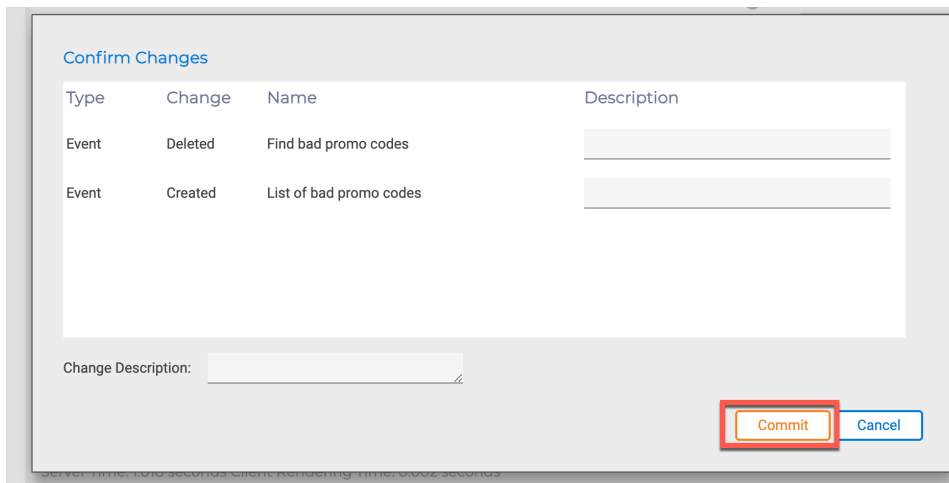
34. Now create a report for this. Click **Reports**, **Report Builder**.
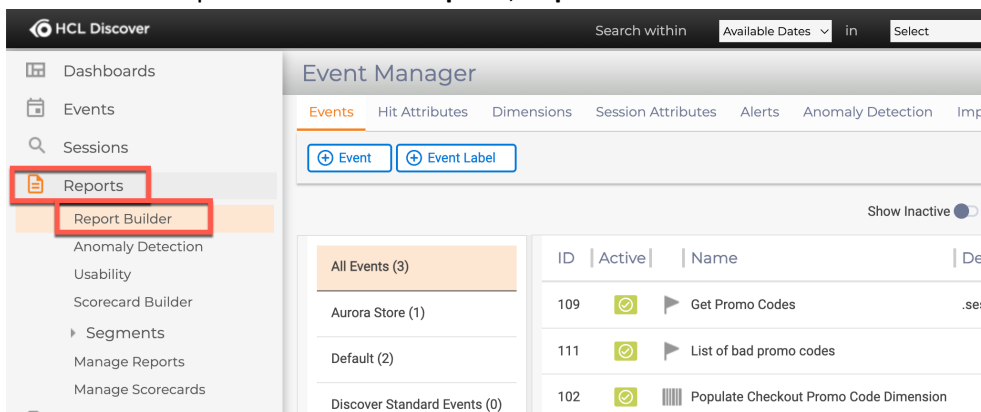
35. Then add your event. Click **Add Event**, open **Default**, select your **List of bad promo codes** event and click **Select**.

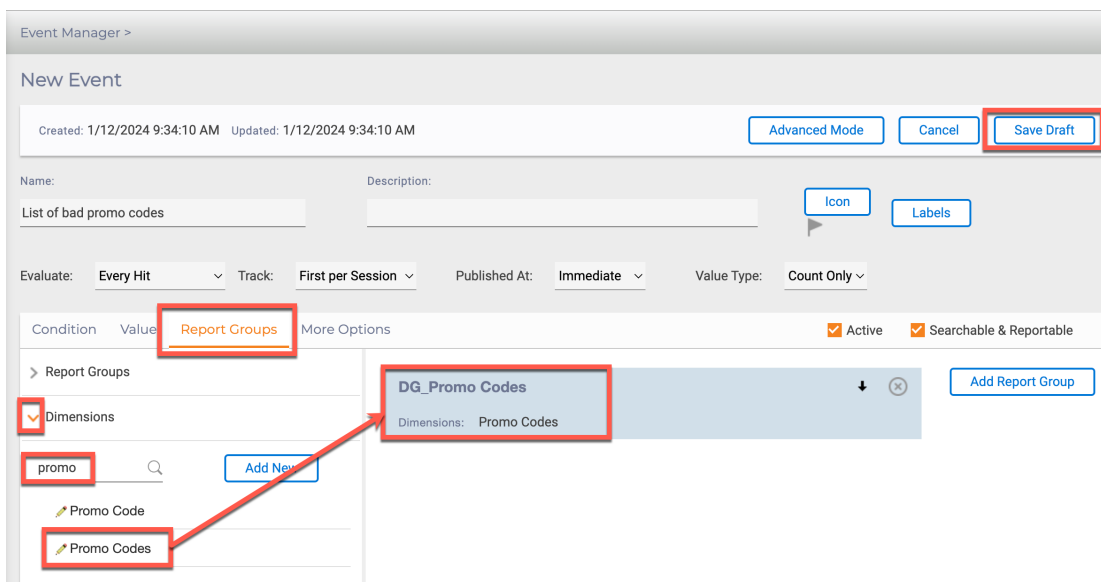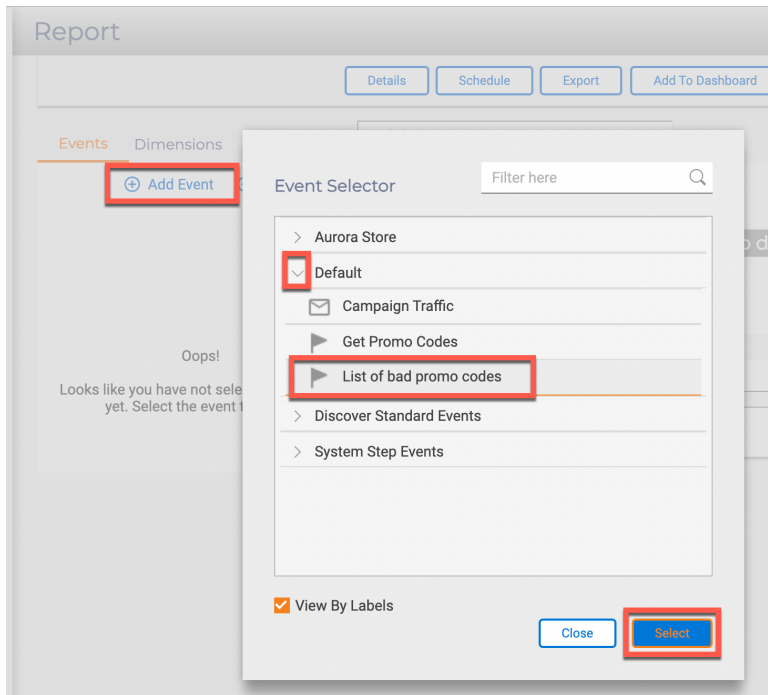36. Then add your Promo Codes segment. Click **Dimensions** and drag & drop your **Promo Codes** on the **<Add Segment>** button.
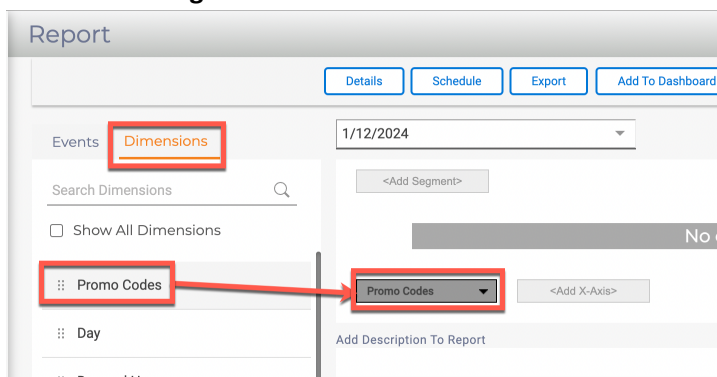
37. Then add it to the Commerce tab under the Overview dashboard. Click **Add to Dashboard**, give it a title, e.g. **Report list of bad promo codes** and click **Save**.
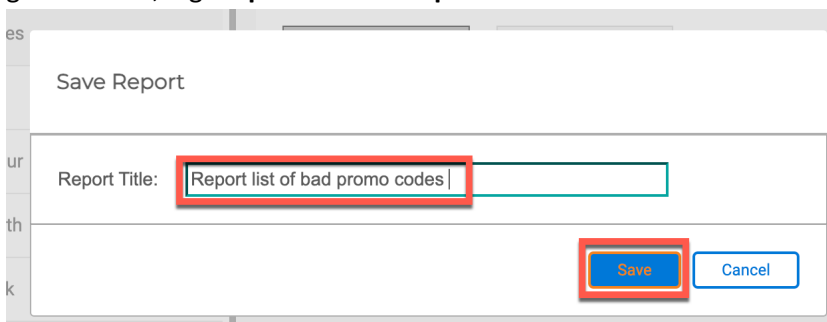
38. Then select the target tab. Click **<Select a tab>**.

39. Then open the **Overview** dashboard, select the **Commerce** tab and **click Select**.

40. Check your settings and notice all options. Then click **Add**.
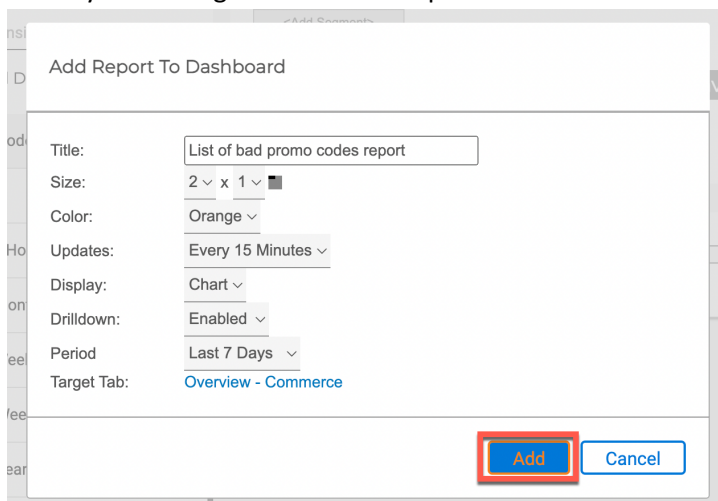
41. Check the message and click **Close**.
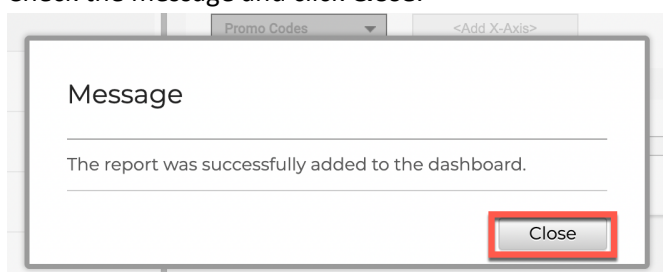
42. Then go to the commerce tab under the Overview dashboard. Click **Dashboards**, **1. Overview** and **Commerce**. Notice that under Manage Dashboards, you may use this again.
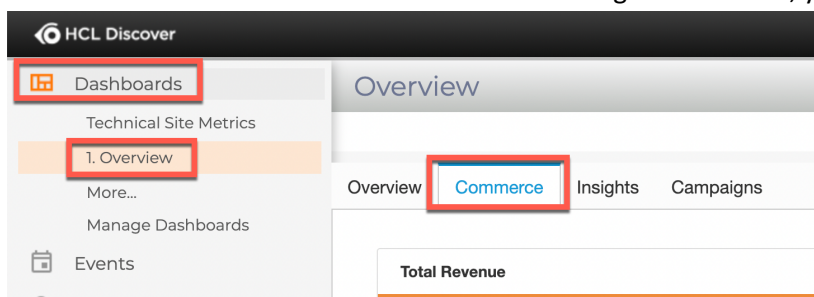
43. Then scroll down to see your new report. It shows, as it works any interactions that that happened after you have created your event.
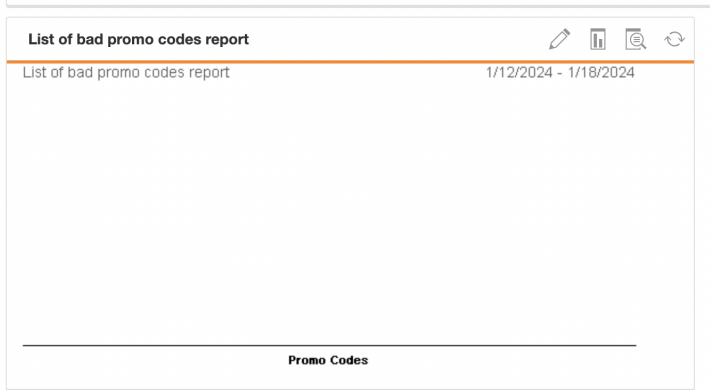
44. Hence, you need to create the event again. Go and add a now bad promo code that is different from the previous, e.g. **Promo**, and click the validate icon, so the invalid promo code error shows again.
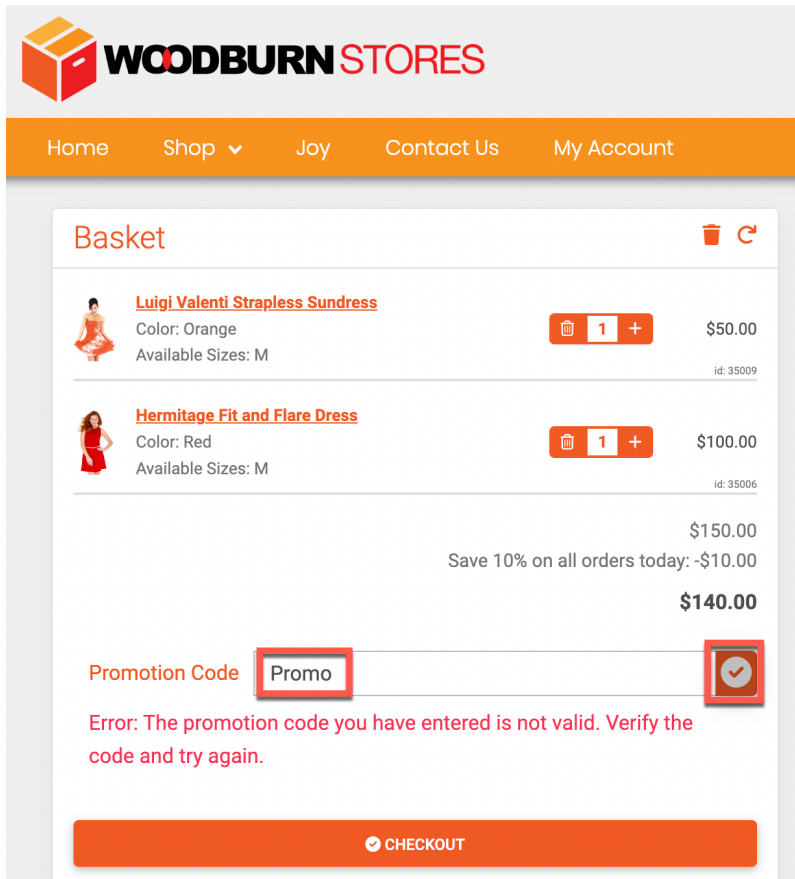
45. Then ensure it is included in Discover. Go to S**essions** – **Search Active** and under events, select your list of bad promo codes event. Click **Events** and **Select Event**.
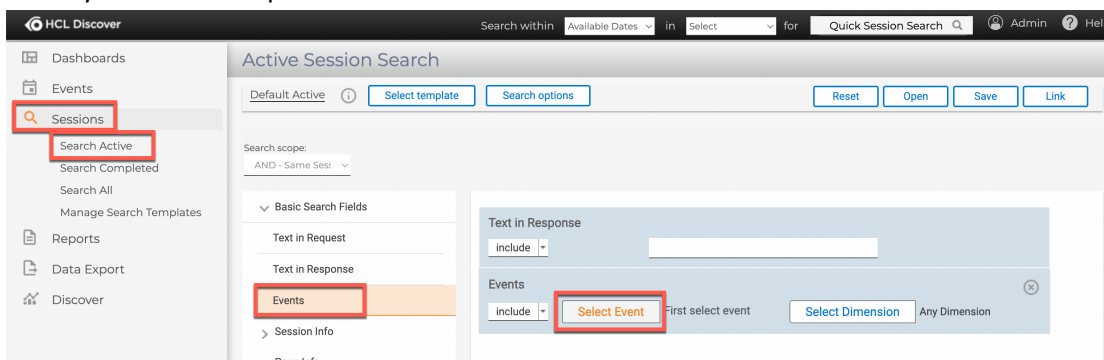
46. Then expand **Default**, select **List of bad promo codes** and click **Select**.
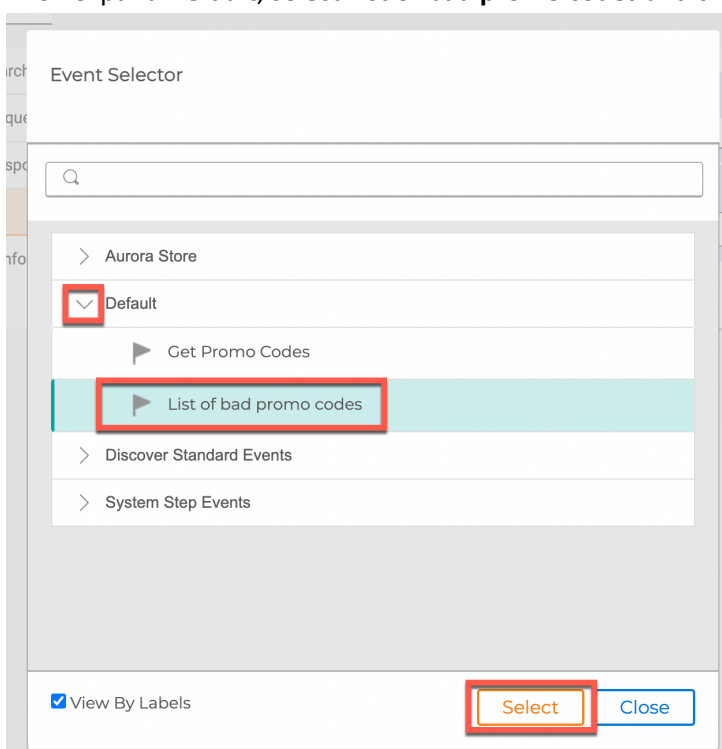
47. Then click **Search**.
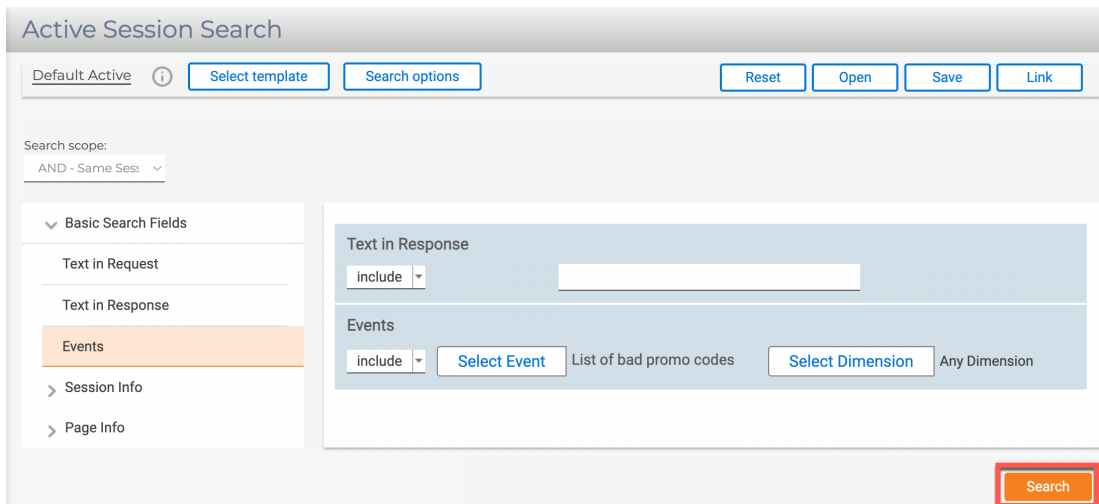
48. Then replay it. Click the **replay** icon and then **Advanced**.
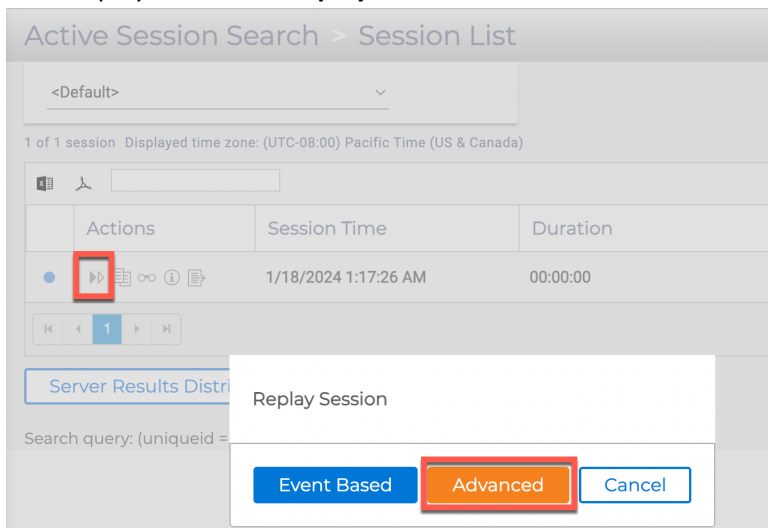
49. Now check if your new bad code has been recognized in the replay. Then send it to the event tester. Click **Session**, **Send to Event Tester**.
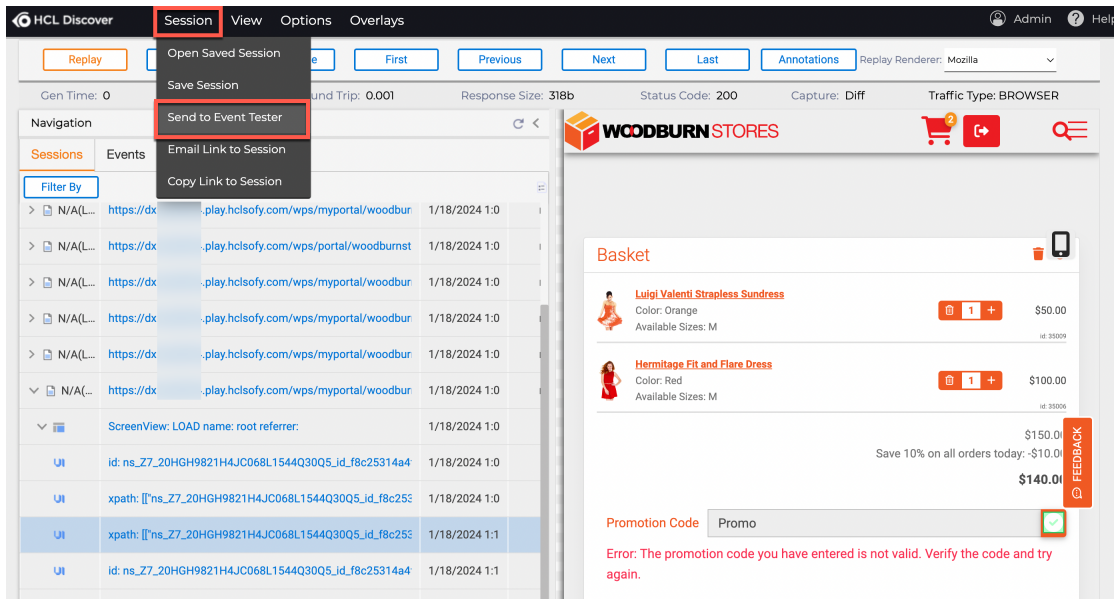
50. Name the session something like **Promo** and click **Send To Event Tester**.
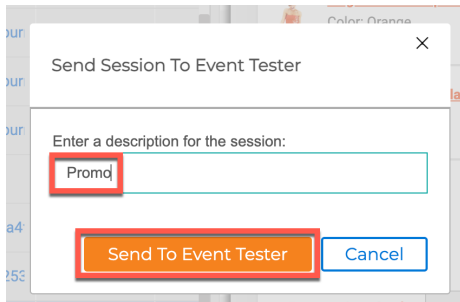
51. Then click **OK**.
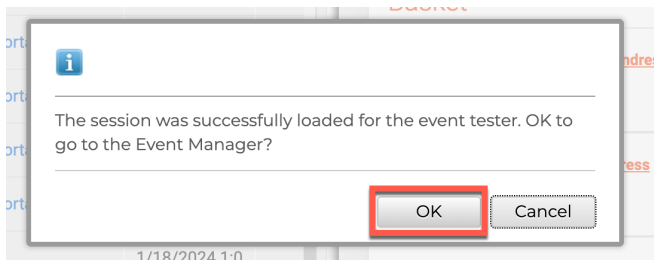
52. It opens it in a different tab. Then ensure you select your new **Promo** session, select the **List of bad promo codes** under **Default** and click **View Results**.
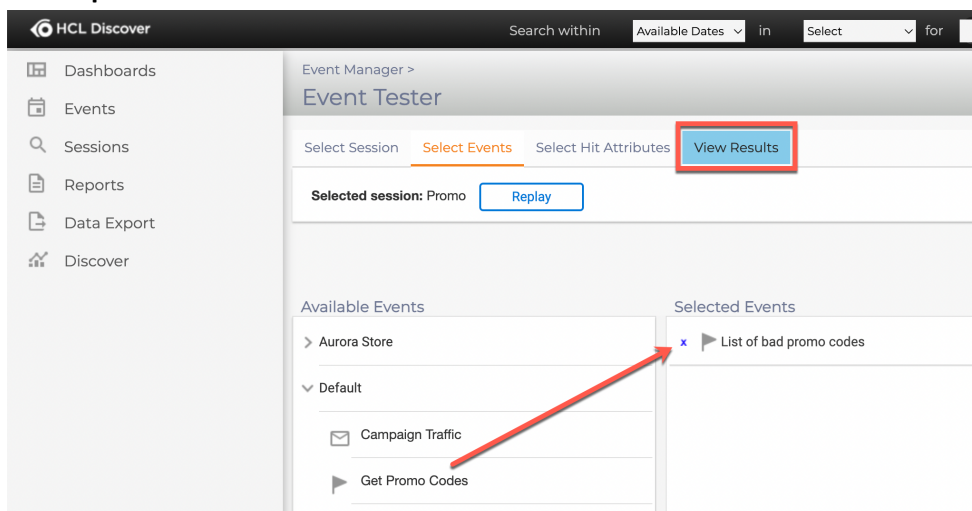
53. Check if the bad promotion code is found and then go to the dashboard. Click **Dashboards** and **1. Overview**.
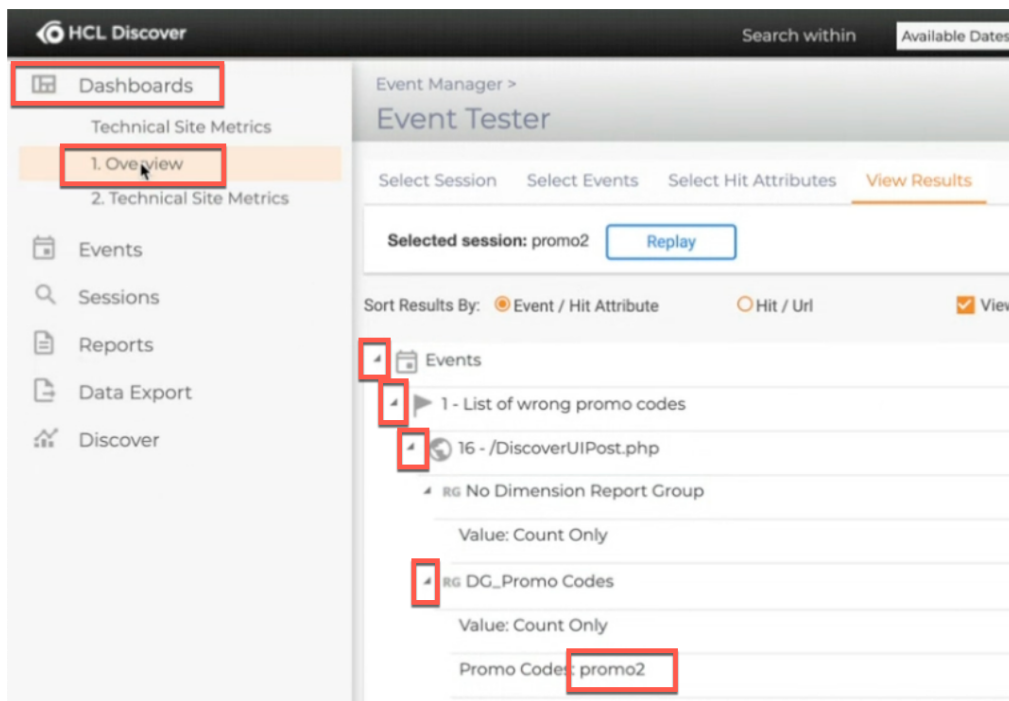
54. Then click **Commerce**.
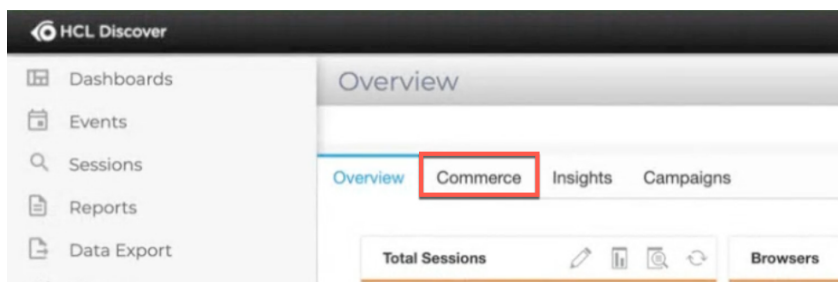
55. And after a while it should show the list of bad promo codes.
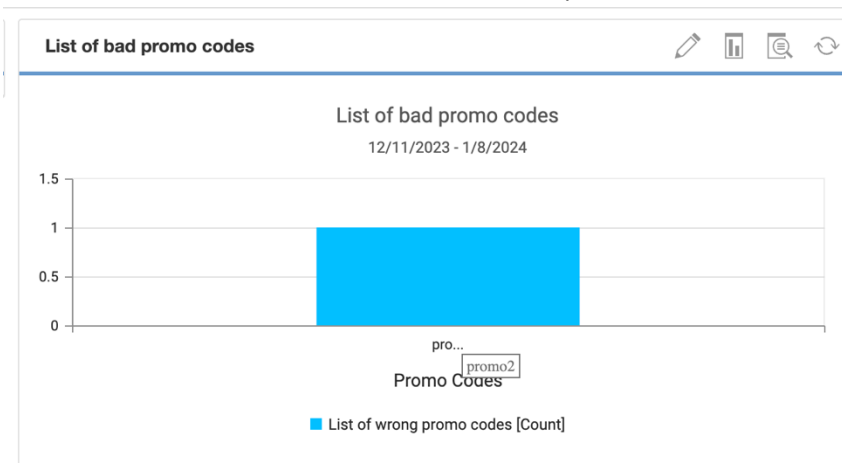
You have successfully configured your dashboard to see the list of bad promo codes. You may configure Discover to do many more things, like auditioning the value of your checkout that were abandoned, etc.

Conclusion

Using this lab tutorial, you have learned how HCL Discover may help you understand how your site is being used, where there are potential issues and how you may replay a session of any of your users to find out details on what went wrong in their navigation.

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

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