

# HCL Digital Experience Integration with HCL Leap for Business Users Lab

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Creating a new generation of experts

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## Table of Contents

- Author(s)..... 3
- Introduction..... 4
- Prerequisites..... 5
- Lab Overview ..... 6
- Part 1: Discover Woodburn Stores using HCL Leap ..... 9
- Part 2: Build and Deploy a Customer Survey Application..... 13
- Part 3: Add the Customer Survey Application to the Home Page ..... 30
- Part 4: Use the Customer Survey Application..... 37
- Part 5: View Customer Survey Results..... 38
- Optional Part 6: Update Customer Survey Application with DAM Image ..... 42
- Conclusion ..... 45
- Resources ..... 46
- Legal statements ..... 47
- Disclaimers..... 48

## Author(s)

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### **Bio**

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Company: HCL

### **Bio**

Tim Golledge is an HCL Digital Experience (DX) Technical Advisor at HCL.

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## Introduction

This hands-on lab guides you in understanding how HCL Leap integrates with the HCL Digital Experience (DX) platform. You will explore the integration aspects using the following two roles:



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

As Mandy, a loyalty customer of Woodburn Stores, you will discover how HCL Leap is used to manage the product reviews and later to start giving input on how the site should evolve.



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

As Rose, the marketing manager of Woodburn Stores, you will review on how this was implemented; Then you will create a new Add New Service application, add this to the home and try it out. Once one more feedback is received, you will review it and further enhance your application with a DX DAM image.



## Prerequisites

1. Completion of [HDX-INTRO](#) and [HDX-BUS-100](#) courses, including the labs (specially the one on Woodburn Stores), as this gives you a good basis on using DX and the right DX content and assets used in this lab
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 both DX & Leap
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 in your Desktop. This helps you to run the lab more easily, and you may later replace them by your own ones.

You will be using the following user IDs and passwords:

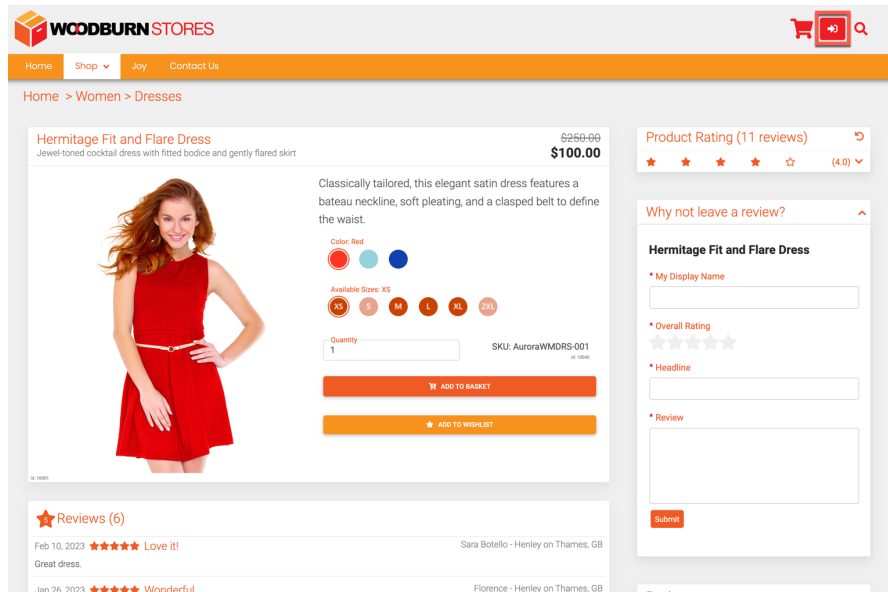
Purpose	User	Password
SoFy Login	Your official email id	Your password
SoFy Solution Console Login	sol-admin	<from solution console>
Practitioner Rose Bozli	rbozli	HCL-Dem0
Member Mandy Zhang	mzhang	HCL-Dem0

## Lab Overview

In this lab, there are several parts to learn how to work with HCL Leap and integrate it in HCL Digital Experience. These are shortly introduced now.

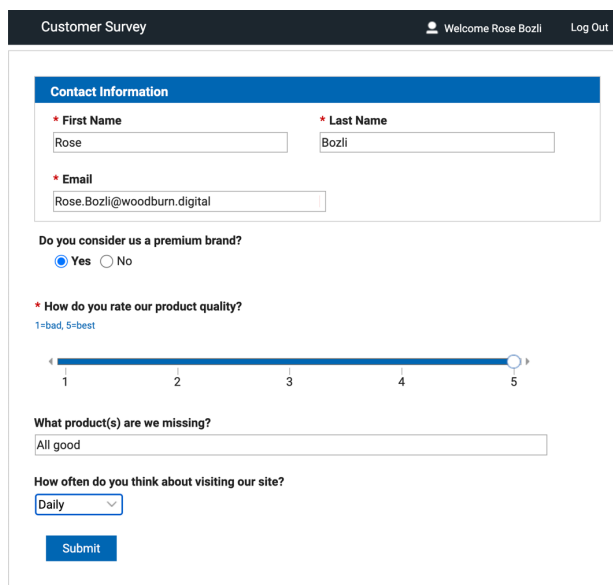
### Part 1: Discover Woodburn Stores using HCL Leap

As a customer, Mandy, you will first discover how you may use the Product Reviews application.



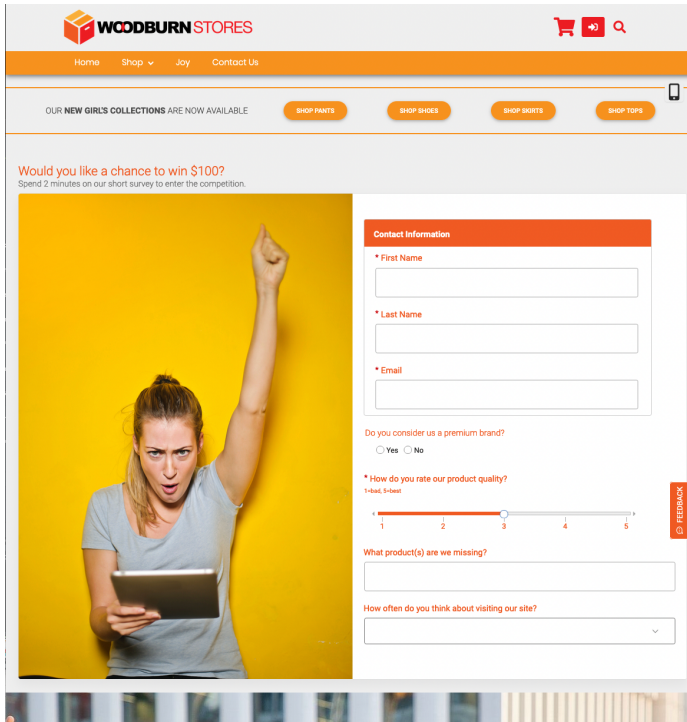
### Part 2: Build and Deploy a Customer Survey Application

Then, as Rose, the Marketing Rep at Woodburn Stores, you will learn how this application was built and then build and deploy a new Customer Survey Application to gather customer data for future marketing activities.



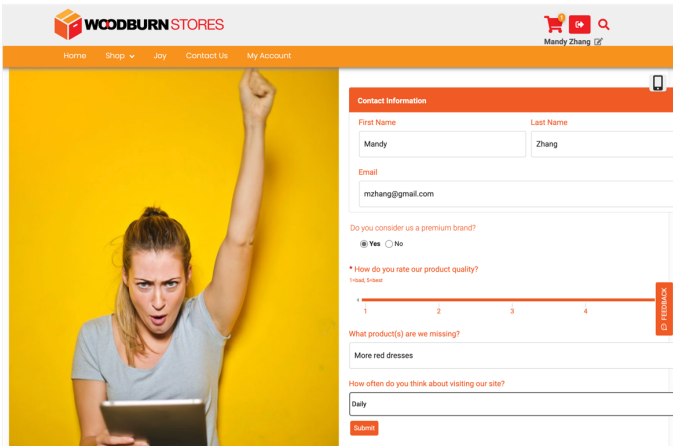
### Part 3: Add the Customer Survey Application to the Home Page

Then you will deploy your new application to the home page, customize it, target it to be hidden from employees, and try it out.



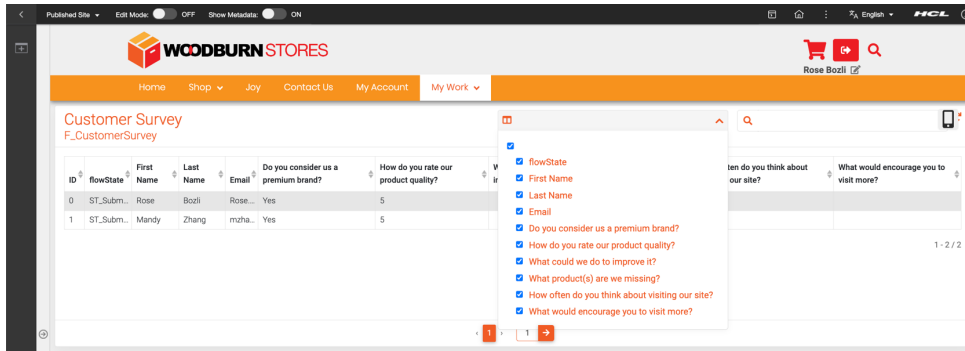
### Part 4: Use the Customer Survey Application

Then Mandy will use it as well.



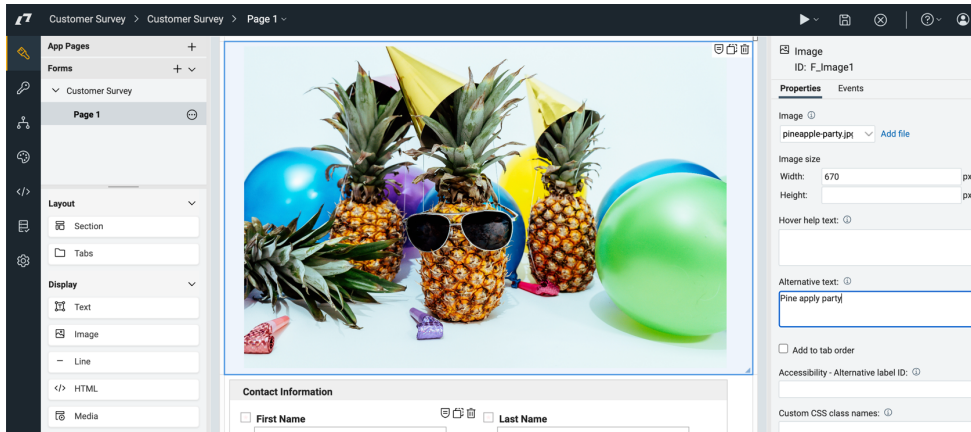
### Part 5: View Survey Results

Then, as Rose again, you will check the progress on the feedback.



### Optional Part 6: Update Customer Survey Application with DAM Image

And to make the application more attractive, you'll add a new image to the top of the application, all with no help from IT.

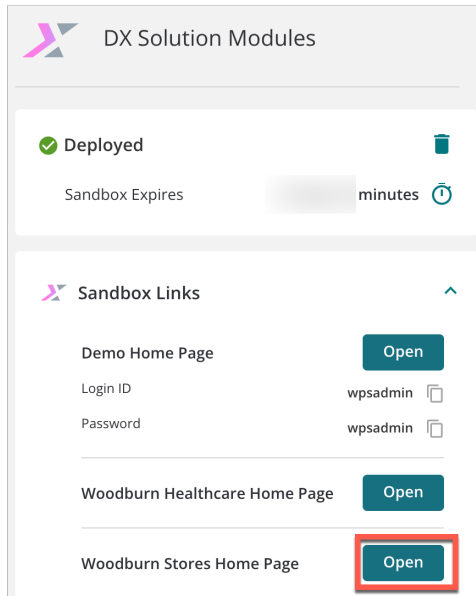


Let's get started!

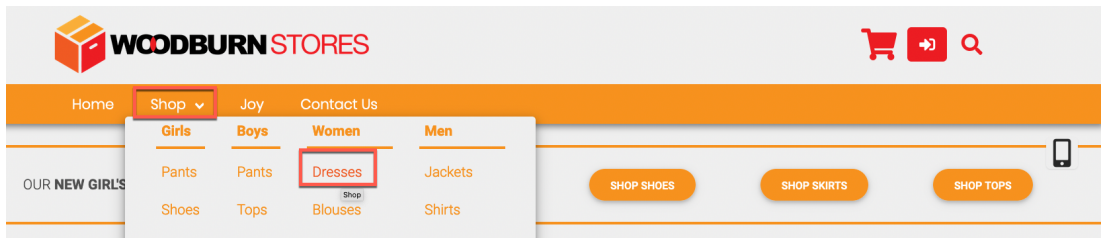
## Part 1: Discover Woodburn Stores using HCL Leap

As a customer, Mandy, you will first discover how you may use the Product Reviews application.

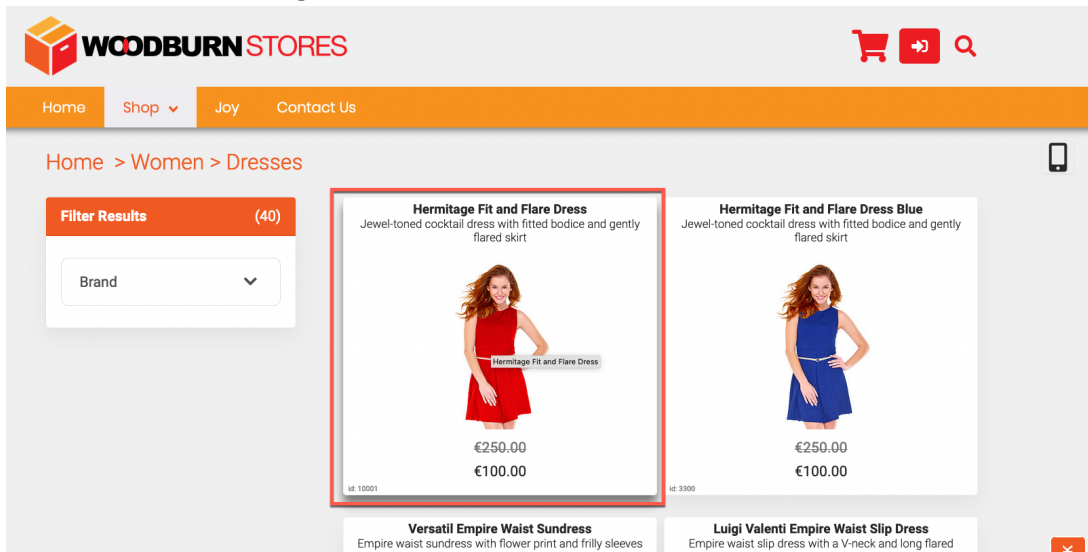
1. On your deployed instance of the DX Solution Modules on HCL SoFy, open the Woodburn Stores Home Page. You can easily open it from the Sandbox Links. For the **Woodburn Stores Home Page**, click **Open**.



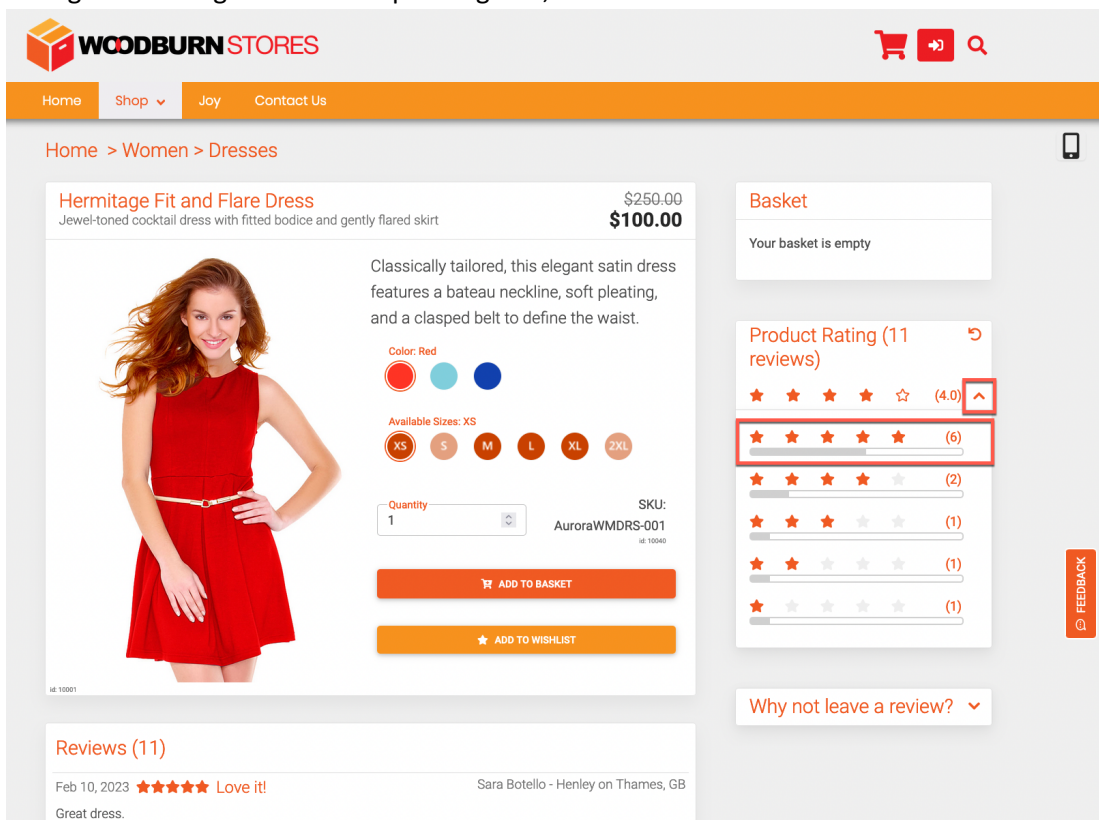
2. This brings you to the Home Page of Woodburn Stores. Go and see the women dresses. Click **Shop** and **Dresses** under **Women**.



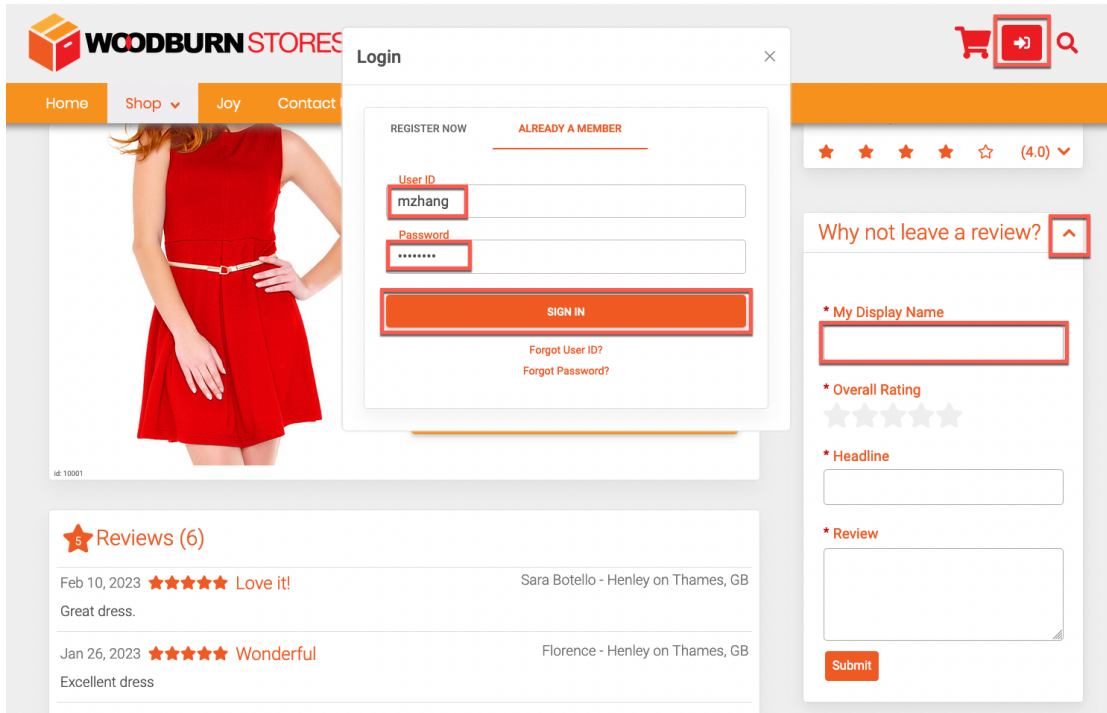
3. Then select the **Hermitage Fit and Flare Dress**.



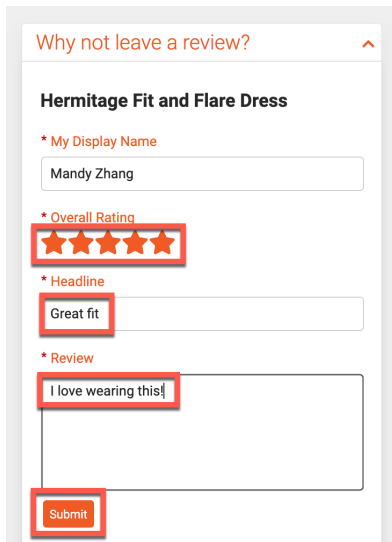
4. Notice the current rating of this dress that is 4.0. Check out the current 11 reviews below and then filter to show only the 5-star ratings, by expanding the Product Rating and clicking on the corresponding row, as shown.



- Now only those 6 5-star reviews show below. Now leave a review. Open the **Why not leave a review?** section and notice it has no **My Display Name** filled out. Now log in as Mandy to get this prefilled. Click the **log in** icon. Then enter your credentials: User ID **mzhang** with Password **HCL-Dem0** and click **SIGN IN**.

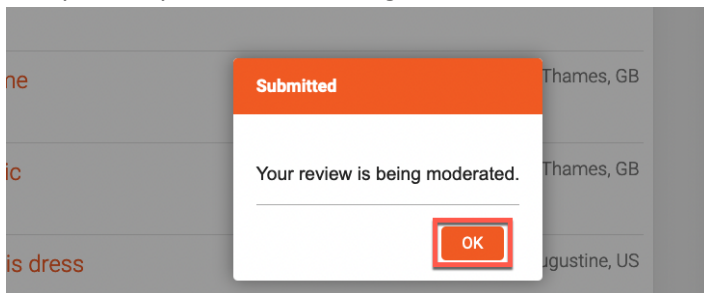


- Now it shows your name. Give it an **Overall Rating**, **Headline** and **Review** which you may easily find back later, and then click **Submit**. For example.





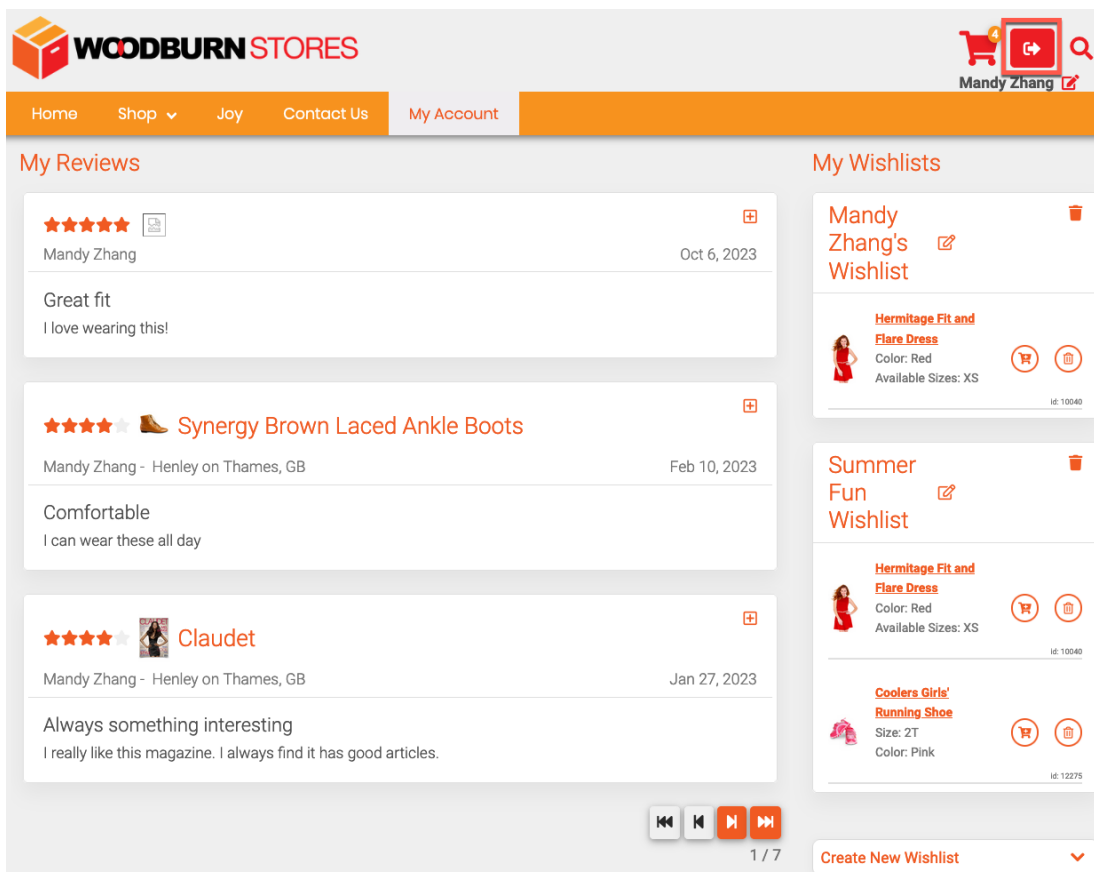
7. And you see your review is being moderated. Click **OK** to close.



8. Then have a look at all your reviews and wishlists under the My Account page. Click **My Account**.



9. Have a look at your latest and other reviews. You may also manage your wishlists. Then log out.



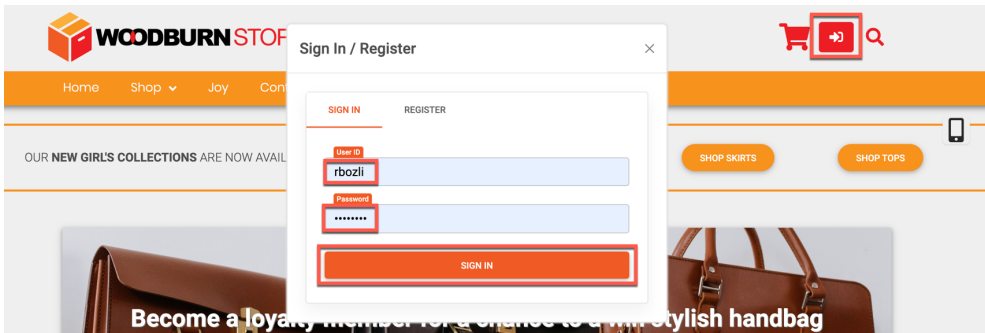
You have successfully discovered the product reviews and that are all managed by an HCL Leap application with different user interfaces.



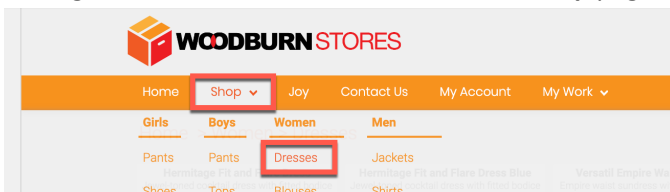
## Part 2: Build and Deploy a Customer Survey Application

Then, as Rose, the Marketing Rep at Woodburn Stores, you will learn how this application was built and then build and deploy a new Customer Survey Application to gather customer data for future marketing activities.

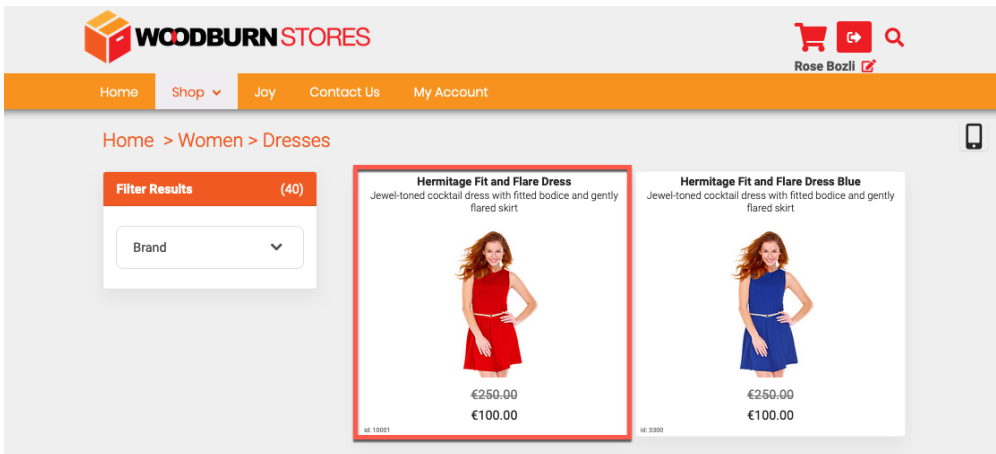
1. Now log in as Rose. Click the log in icon, enter your credentials: User ID **rbozli** and Password **HCL-Dem0** and click **LOG-IN**.



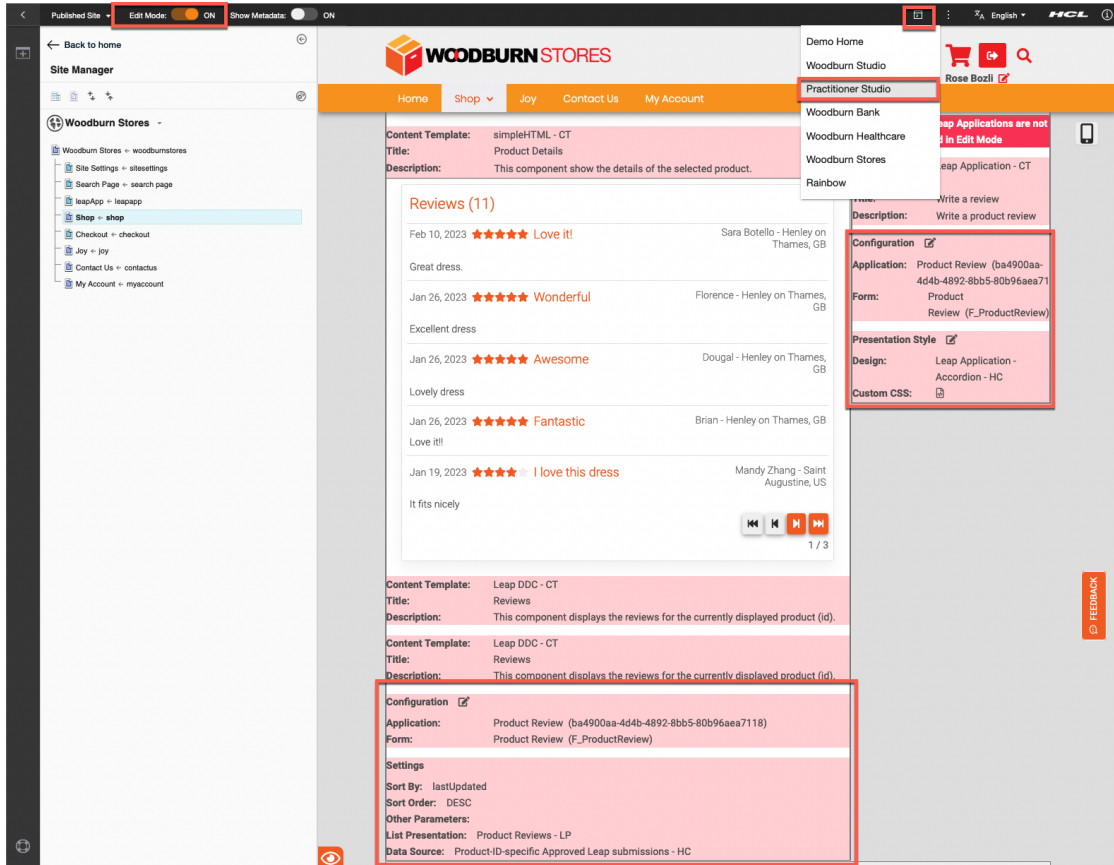
2. Then go to the **Women - Dresses** under the **Shop** page.



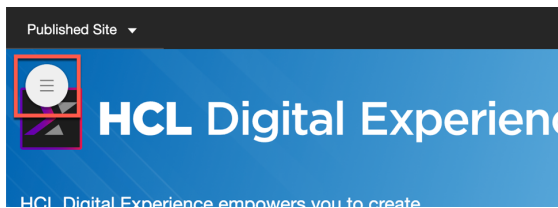
3. Select the red dress **Hermitage fit and Flare Dress**.



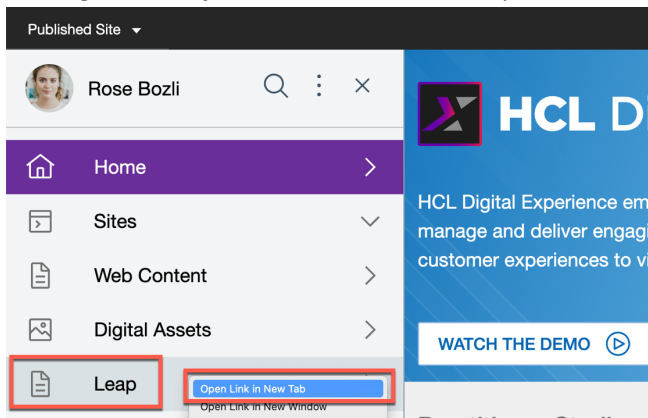
- Then switch on the **Edit Mode** and scroll down to see how the Leap application and form has been selected and configured for the Reviews and Why not leave a review page components. Do not make any modifications, as you will learn how to configure this later. Now create a new application. Open HCL Leap from the Practitioner Studio. First, open the site menu and select **Practitioner Studio**.



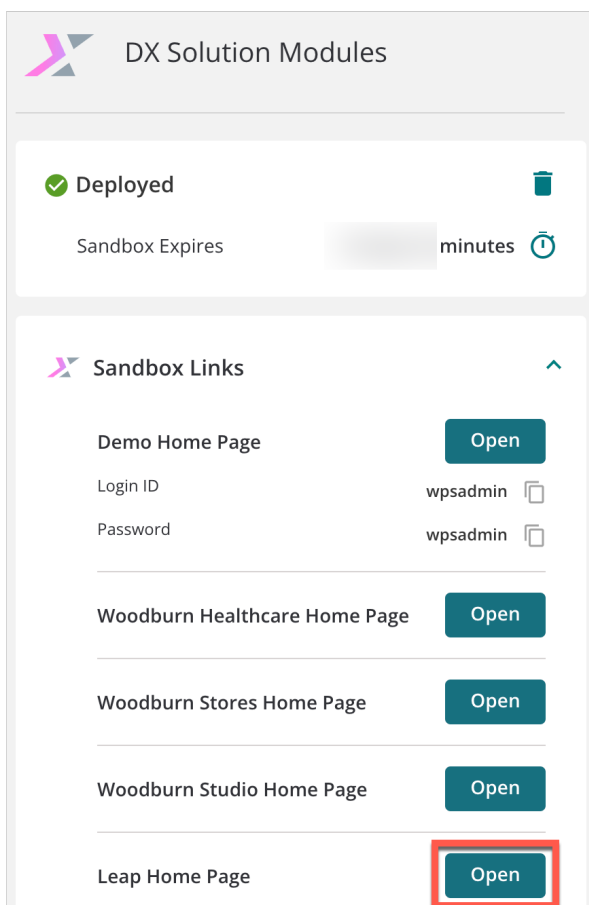
- Then open the **Sitebar**.




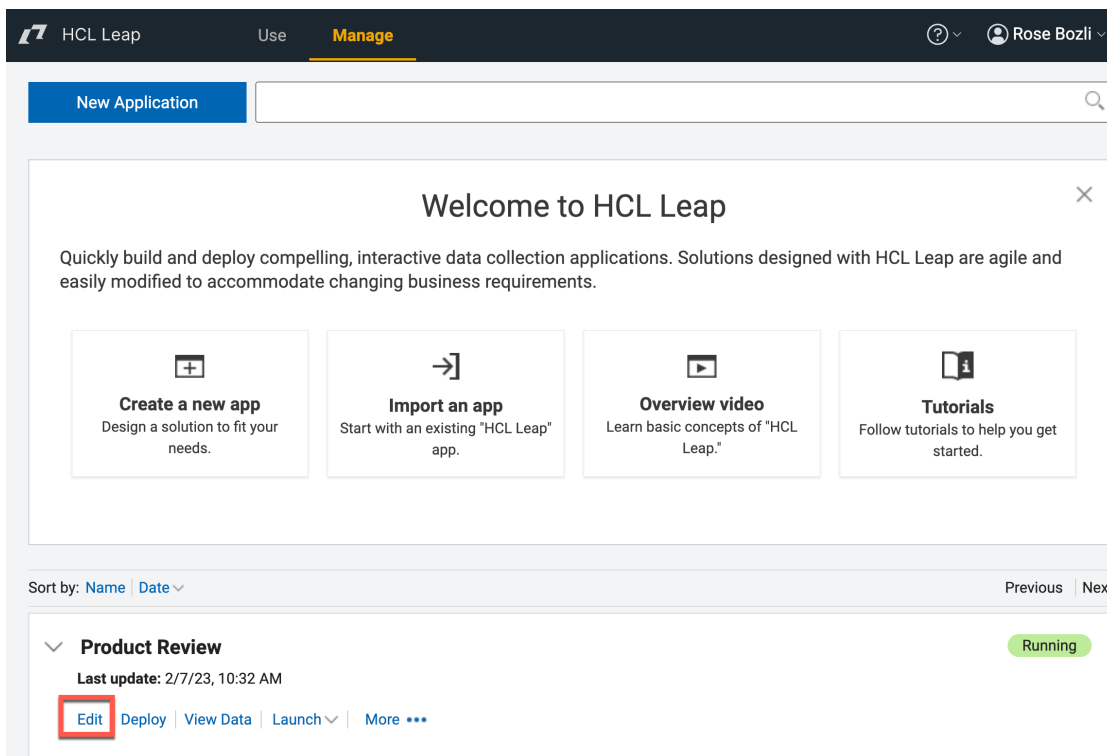
- And right click **Open Link in New Tab** to open HCL Leap in a new tab.



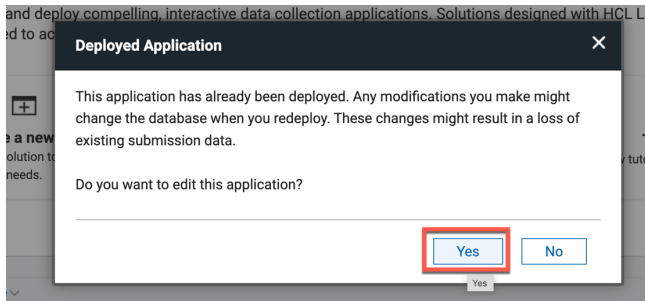
- Note: If this is not configured, you may get the link from your Sandbox Links of your instance of DX Solution Modules. Use the link of the HCL Leap Home Page. Click **Open**.



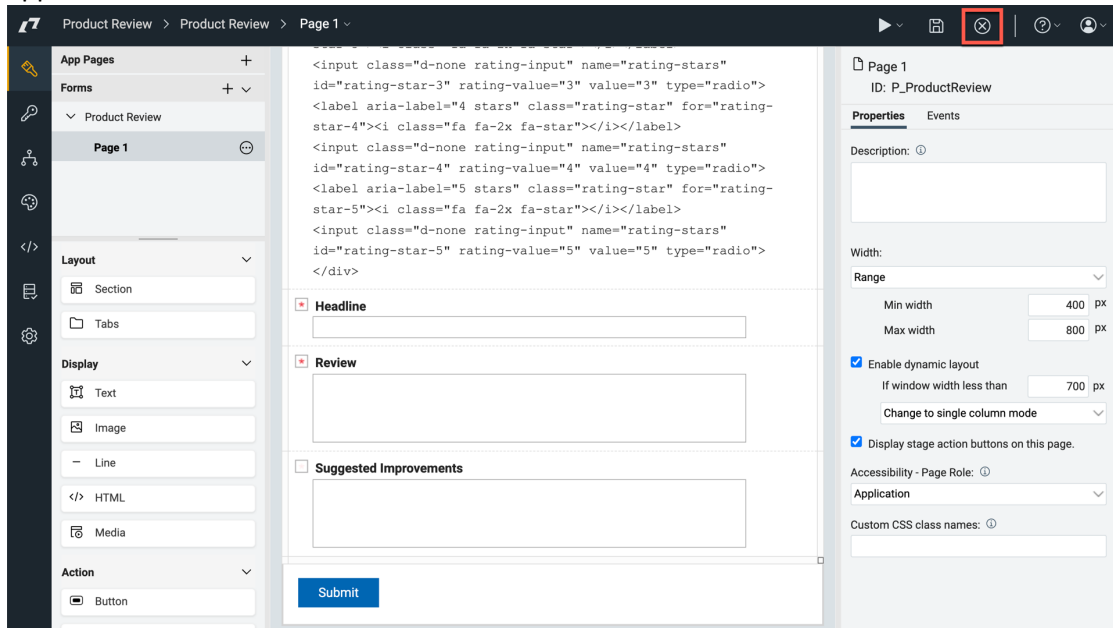
- Notice you may create new applications, import an existing one, and access to an overview video, tutorials and help (see ). Here you see the Product Review application. Click **Edit** to see it in more details.



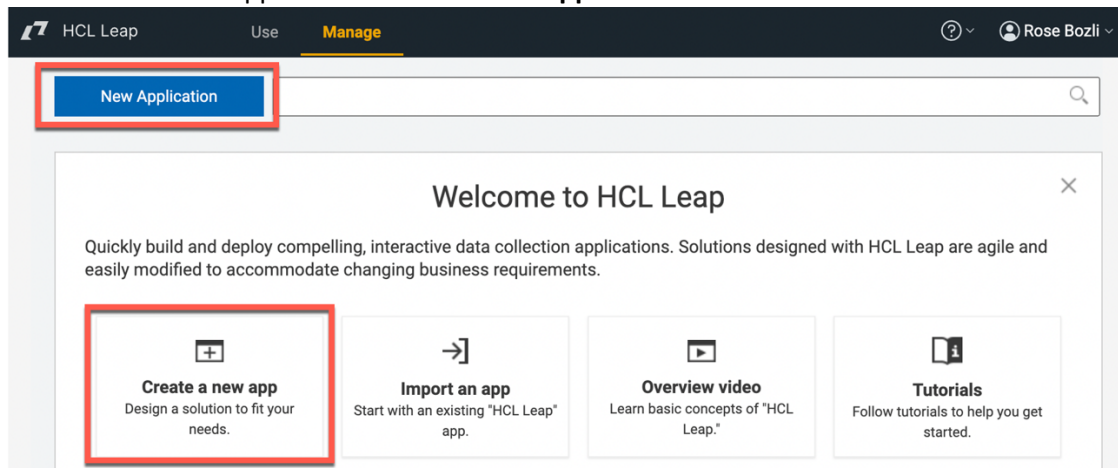
- Click **Yes** to confirm.



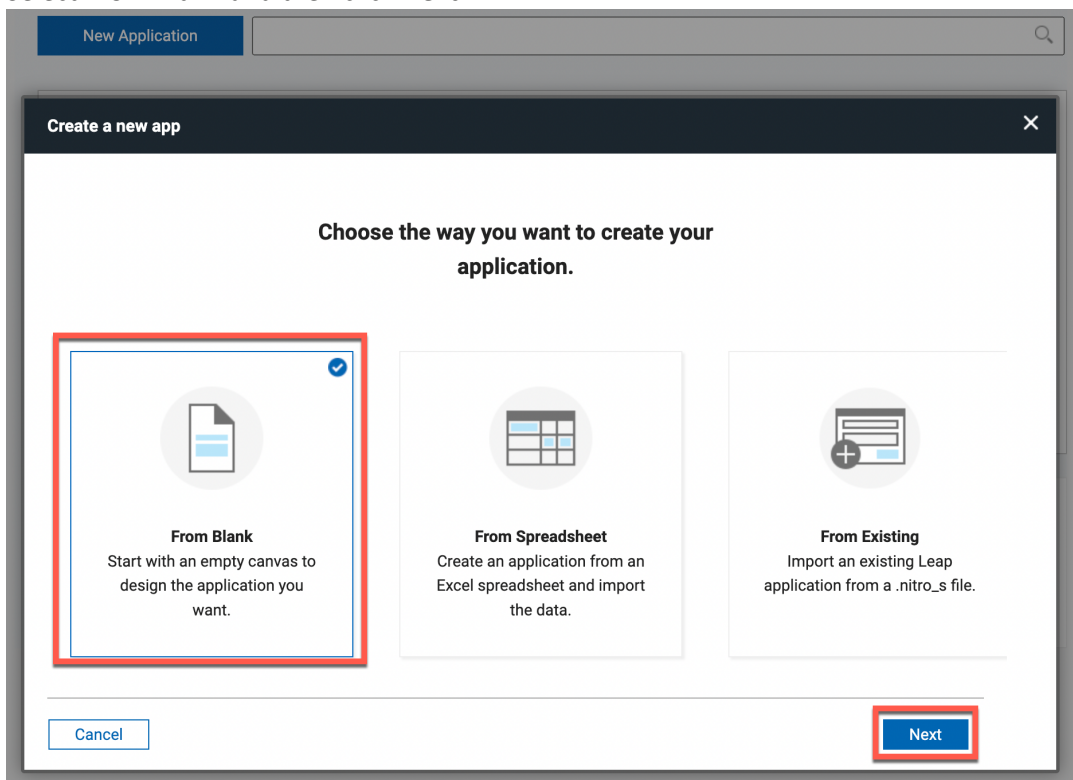
- Look around and scroll down the form and you see the fields of the application, like **Headline**, **Review** and **Suggested Improvements**. Now close it as you will create your own application.



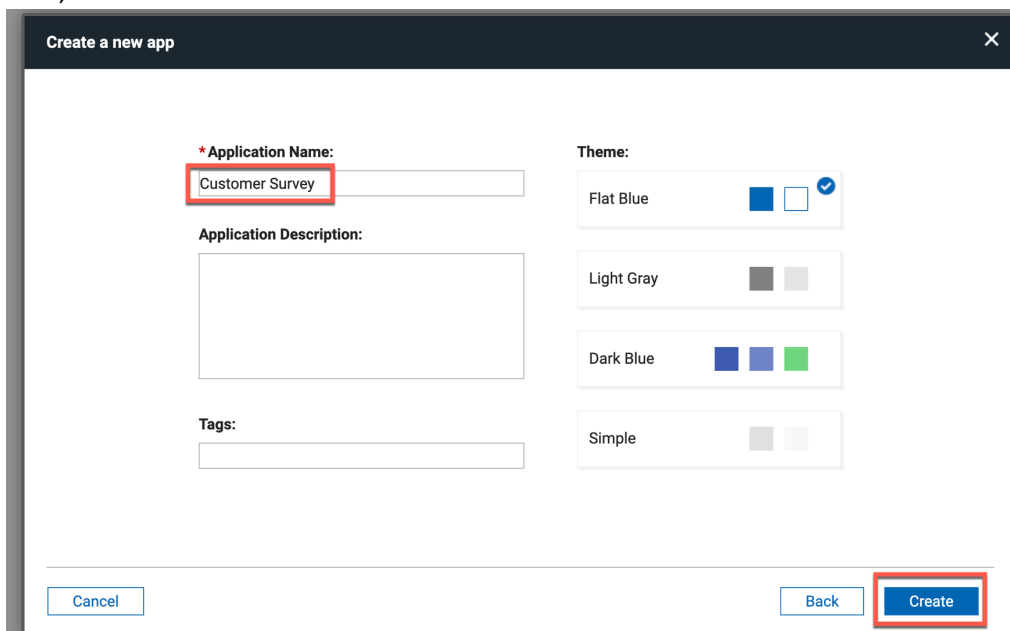
- Now create a new application and click **New Application**.



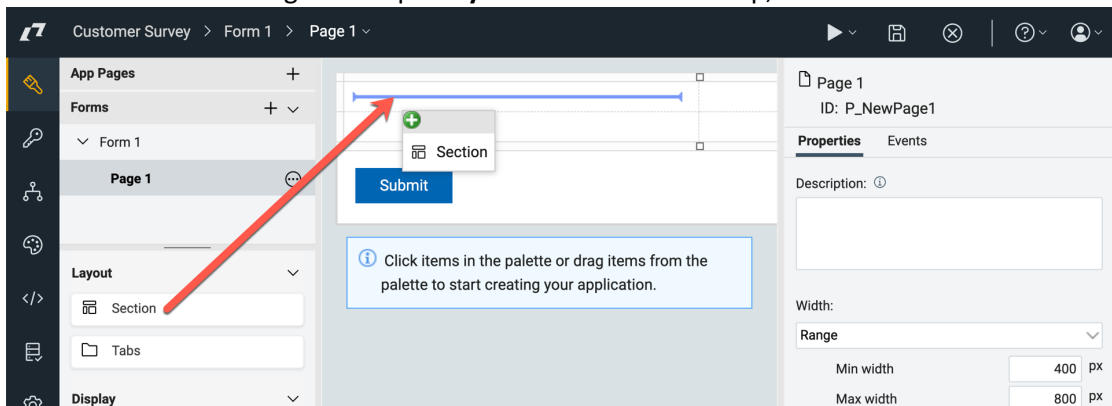
- You have different ways to create your application, as shown. You will create it from blank. Select **From Blank** and then click **Next**.



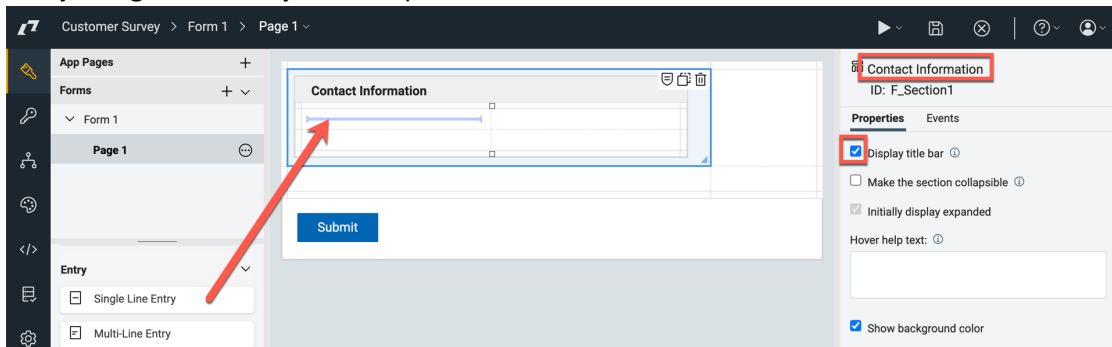
- Then enter your application name: **Customer Survey**. Optionally add a description and tags to find it later more easily. Note you can select a different theme. Keep it to default, Flat Blue, and click **Create**.



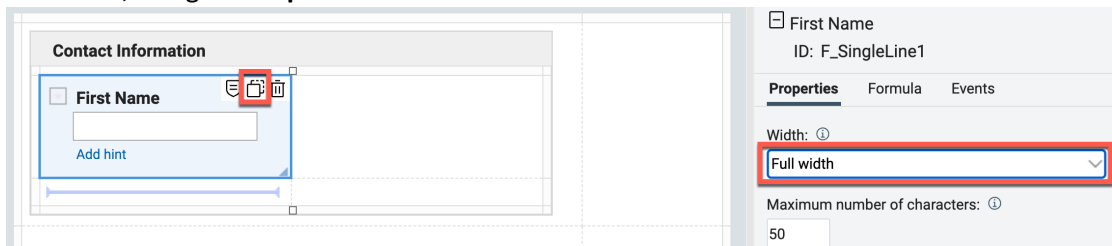
14. This brings you to the form editor. On the default page, here called **Page 1**, add a section for the contact details. Drag and drop a **Layout – Section** to the top, as shown.



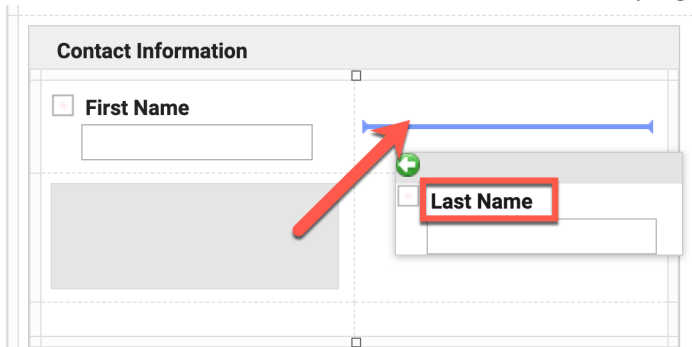
15. Then change the section name to **Contact Information** and select **Display title bar** to have it shown. Then add items to get the user's first name, last name and email to be able to contact the participants who is winning a price. Start with the first name. Drag and drop an **Entry - Single Line Entry** to the top left cell.



16. Change its description by **First Name**, make it full width and then duplicate it to create the last name, using the **Duplicate Item** icon.



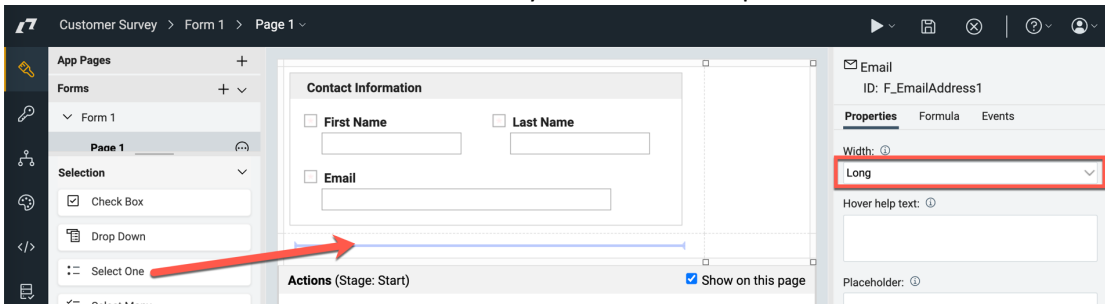
17. Rename it to **Last Name** and move the field to the top right.



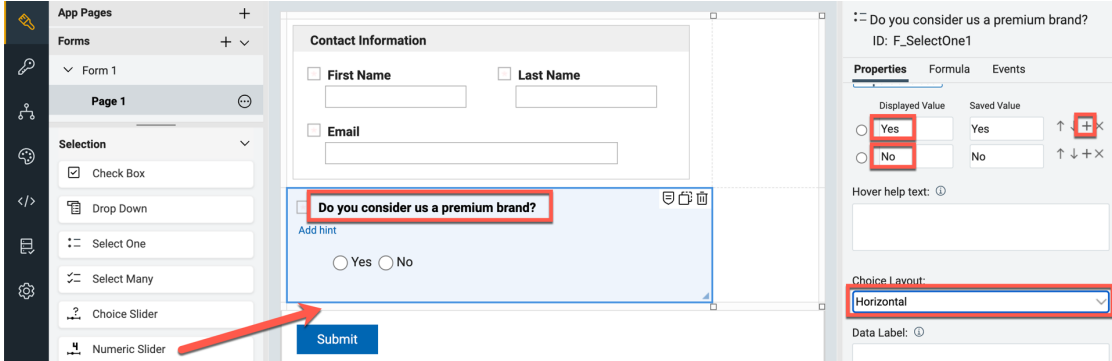
18. Then drag and drop an **Entry - Email** field below.



19. Expand this field over the full width of the section, by dragging it. Change the width to it give enough space for long e-mail addresses. Then drag and drop a **Selection - Select One** field below the section to have them select if they consider us as a premium brand.

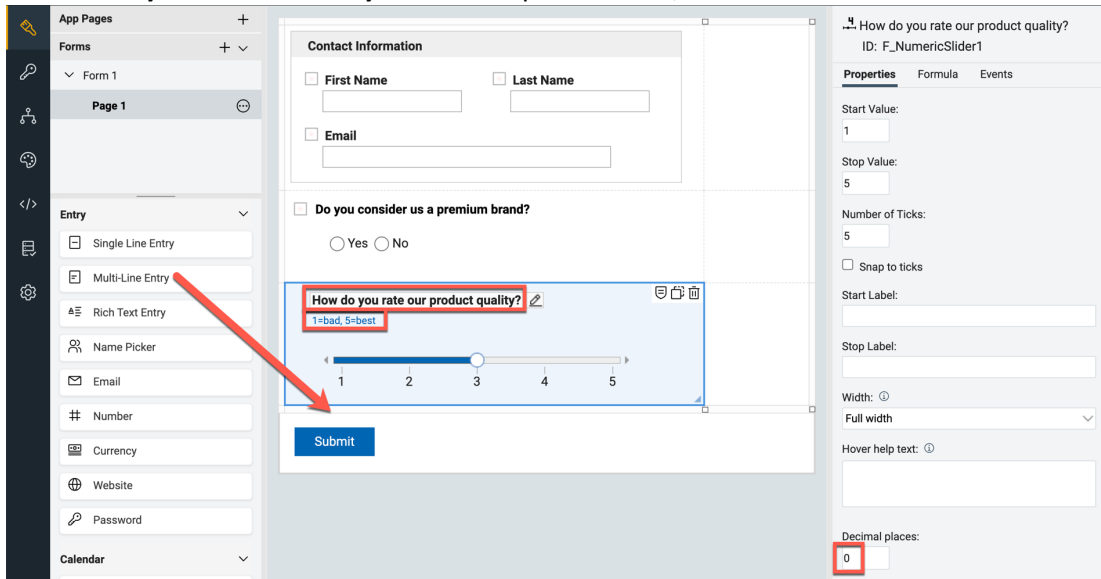


20. Each of these fields can be configured in more details. Change the name of the Select One to **Do you consider us a premium brand?** and then enter two options on the right: **Yes** and **No**, by using the + to add a new option. Change the layout to **Horizontal**. Notice you have additional options, for example to set a default value, add hover help text and more. Then add a **Numeric Slider** below to capture our product quality.

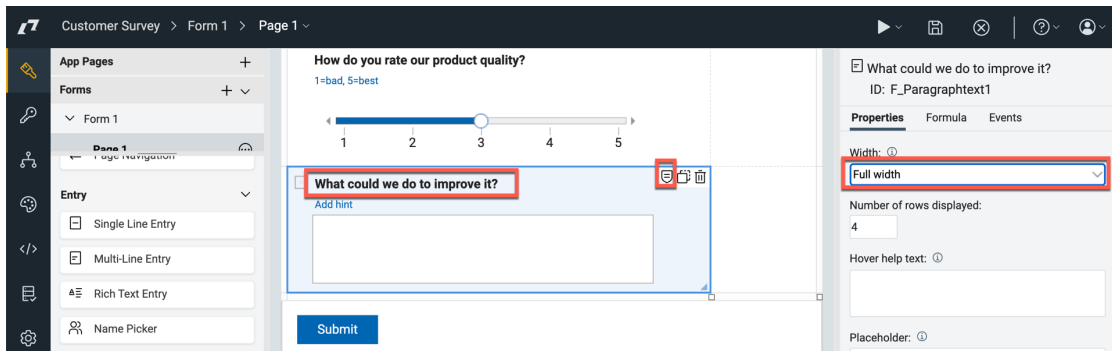




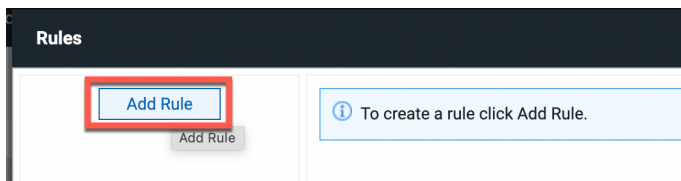
- Change the name of the Numeric Slider to **How do you rate our product quality?** and remove the decimal numbers, by putting it to **0**. Also add a hint, like **1=bad, 5=best**. Then add an **Entry - Multi-Line Entry** below to capture details, if the rate is low.



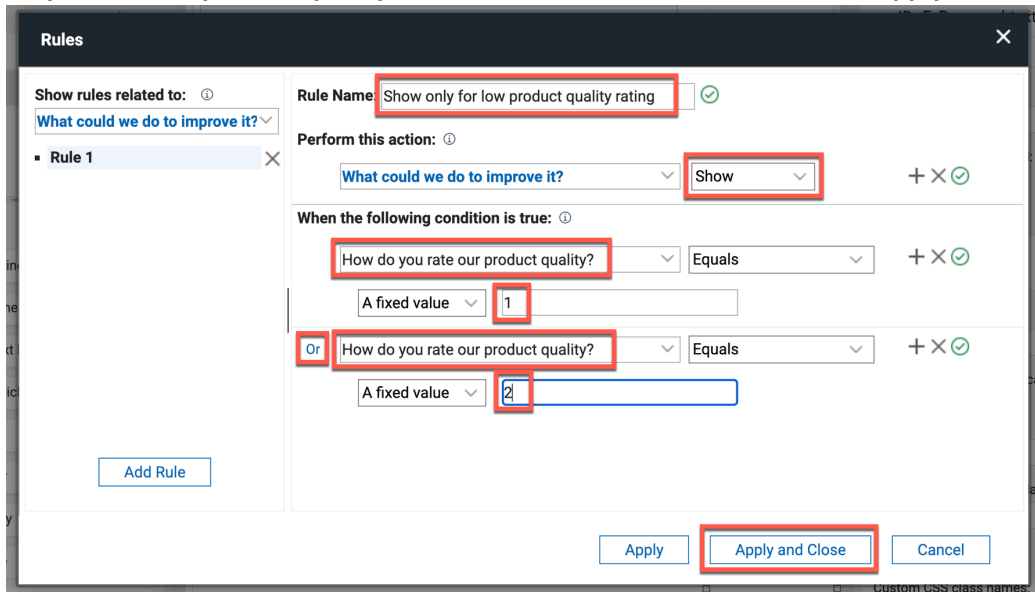
- Change the name of the Multi-Line Entry **What could we do to improve it?** Change the width to **Full width**, and optionally add a hint and hover help text. Then you want to make this only available if the customer has selected a rating of 2 or less. You do that with a rule. Click **Edit Rules** as shown.



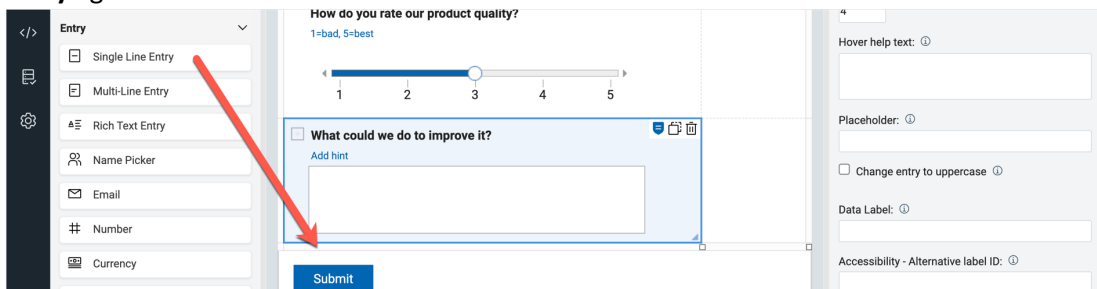
- Click **Add Rule**.



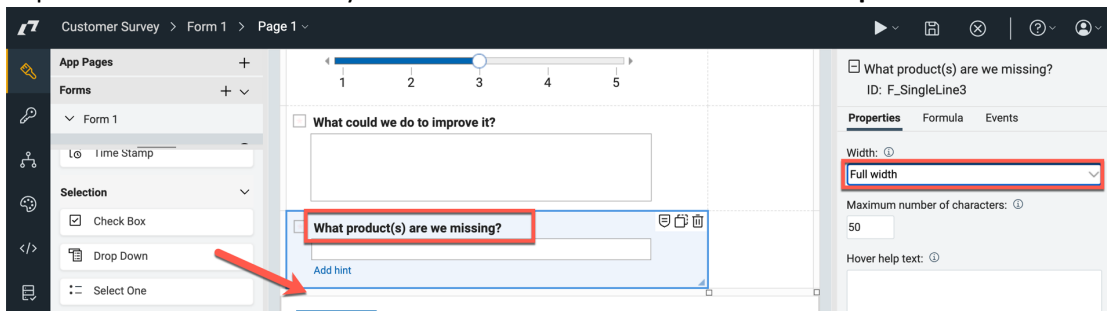
24. Enter the rule name **Show only for low product quality rating**, change the **Perform this action** to **Show**, change the **When the following condition is true** to **How do you rate our product quality?** and fixed value 1. Then use the + to add a condition and change it to **How do you rate our product quality?** and fixed value 2, as shown. Then click **Apply and Close**:



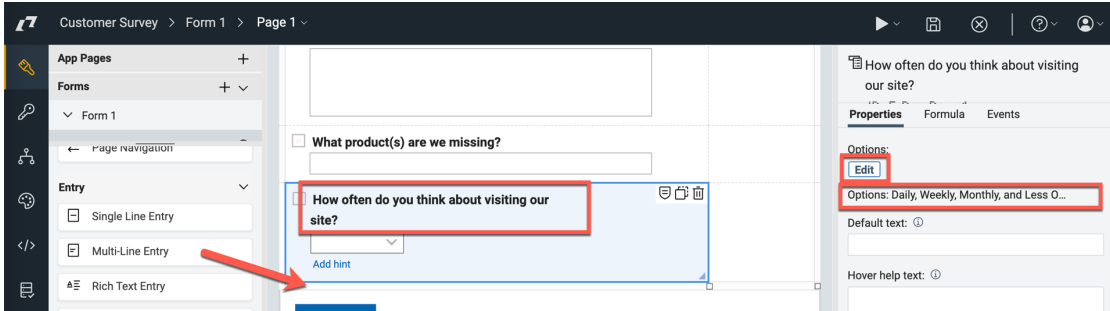
25. Then add a question to find if any products are missing. This is free text. Add a **Single Line Entry** again.



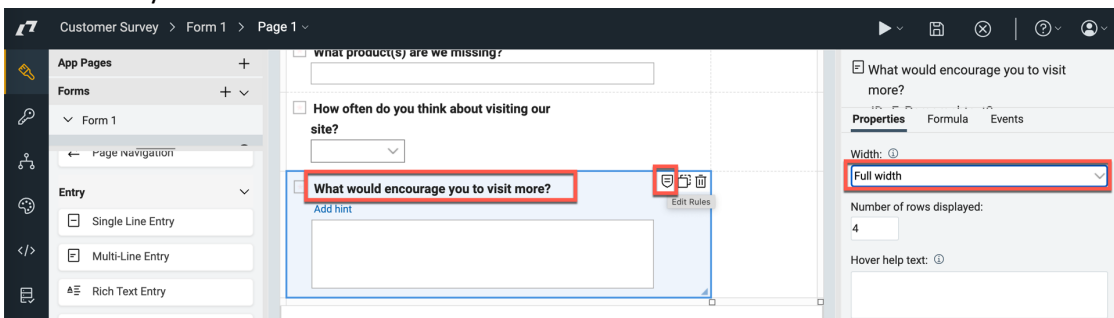
26. Change the name to **What product(s) are we missing?** and make it **Full width**. And then add a question on how often they would visit our site. Add a **Selection - Drop Down** below.



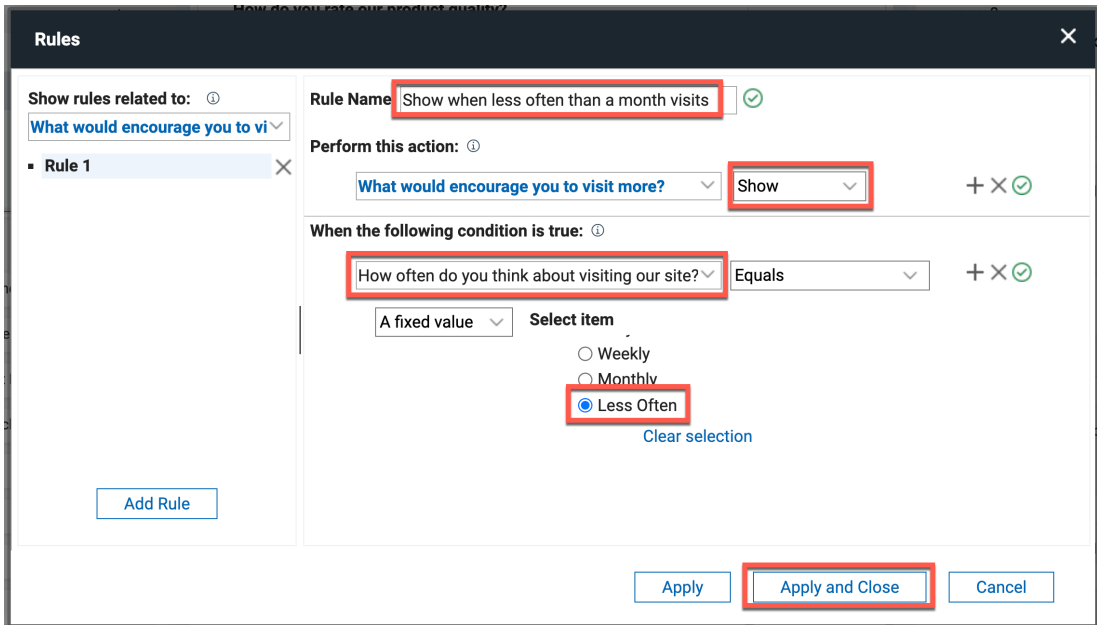
- Change the name to **How often do you think about visiting our site?** and set the options to **Daily/Weekly/Monthly/Less Often**. If Less Often is selected, try to learn what would make them visit more. Add a **Multi-Line Entry** below.



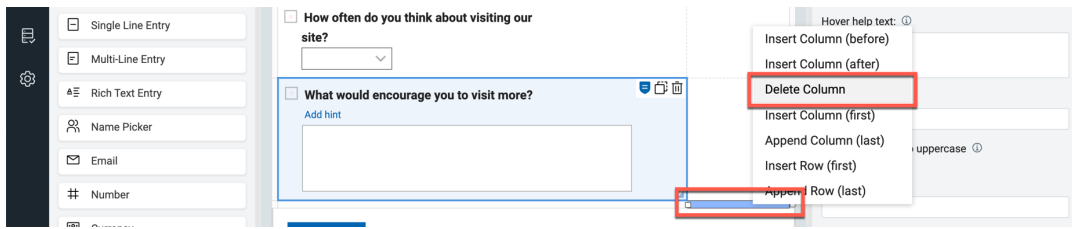
- Change the name to **What would encourage you to visit more?**, make it **Full Width** and add a rule to only show it when Less Often was selected.



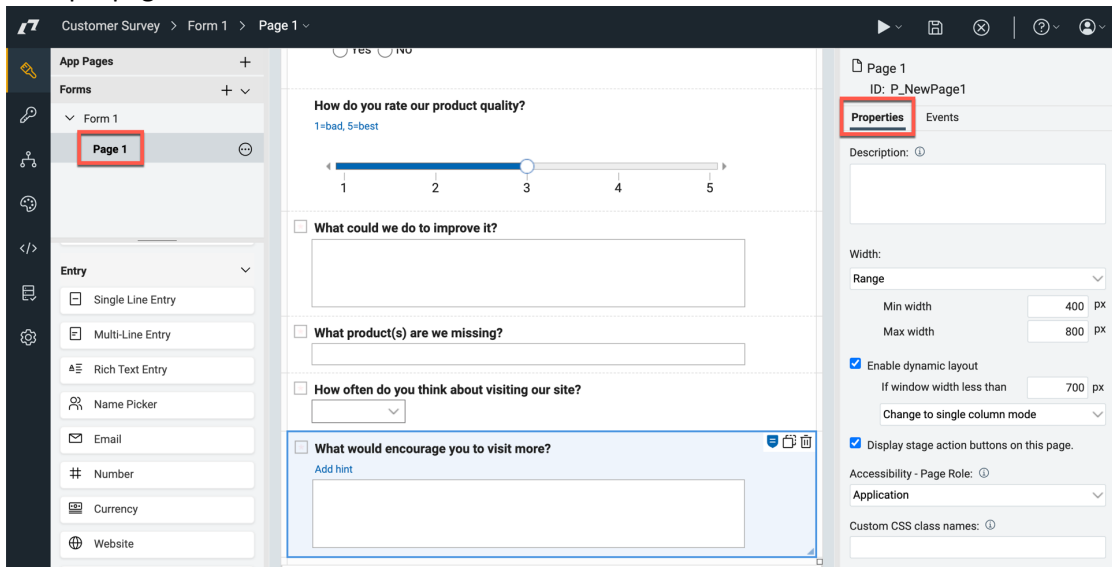
- Name it **Show when less often than a month visits**, perform a **Show** action, select the **How often do you think about visiting our site** condition and set it to **Less Often** and click **Apply and Close**.



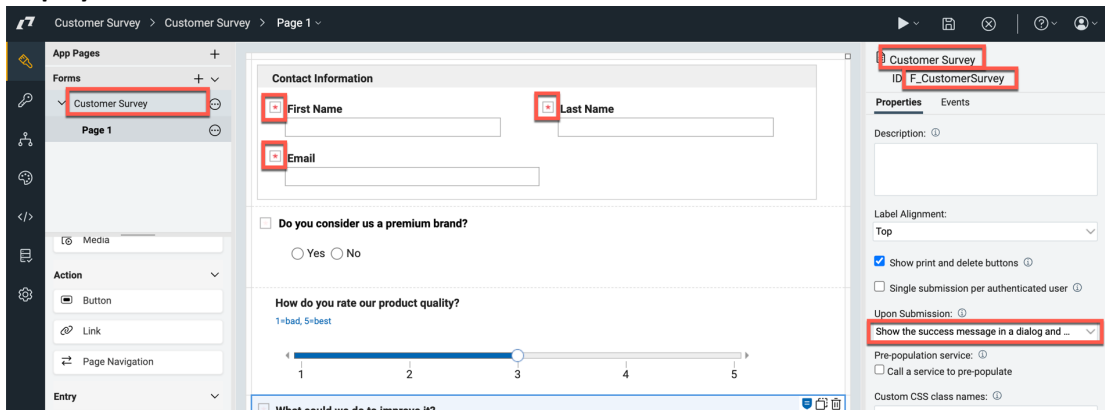
30. As you are only using the first column, delete the second. Click on below the table and then **Delete Column**.



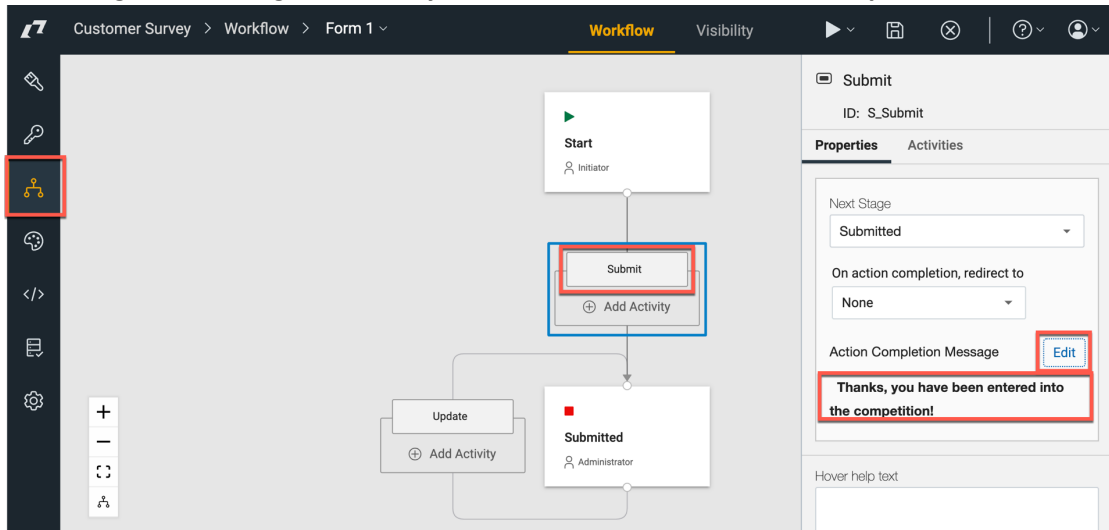
31. Have a look at the page properties and notice, for example, you may set up dynamic layouts. Click **Page 1**. Note, you may update the name and add a description and your form may have multiple pages.



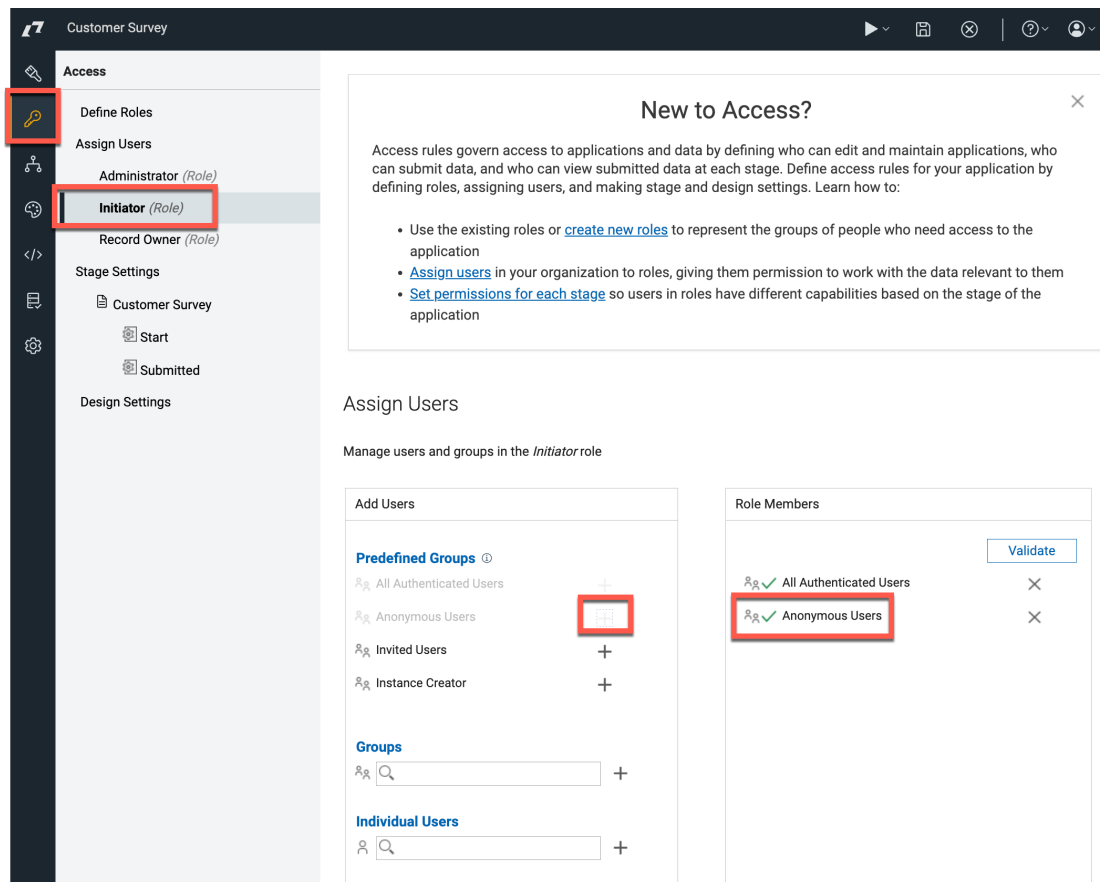
32. Finally, make the **First Name**, **Last Name** and **Email** required, by clicking the checkbox before them. Then configure your form to show a confirmation of your submission in a dialog and then clear the form. Click **Form 1** and check the properties. Notice that you may have multiple forms in a single application. Make this form more recognizable. On the right, change the name to **Customer Survey**, the ID to **ID\_CustomerSurvey**. Optionally, set a description, manage the label alignment, etc. Then you want to control what to show when the survey is completed. Once submitted, you want to thank the users and show an empty survey. Change the **Upon Submission** to **Show the success message in a dialog and then display a new form**.



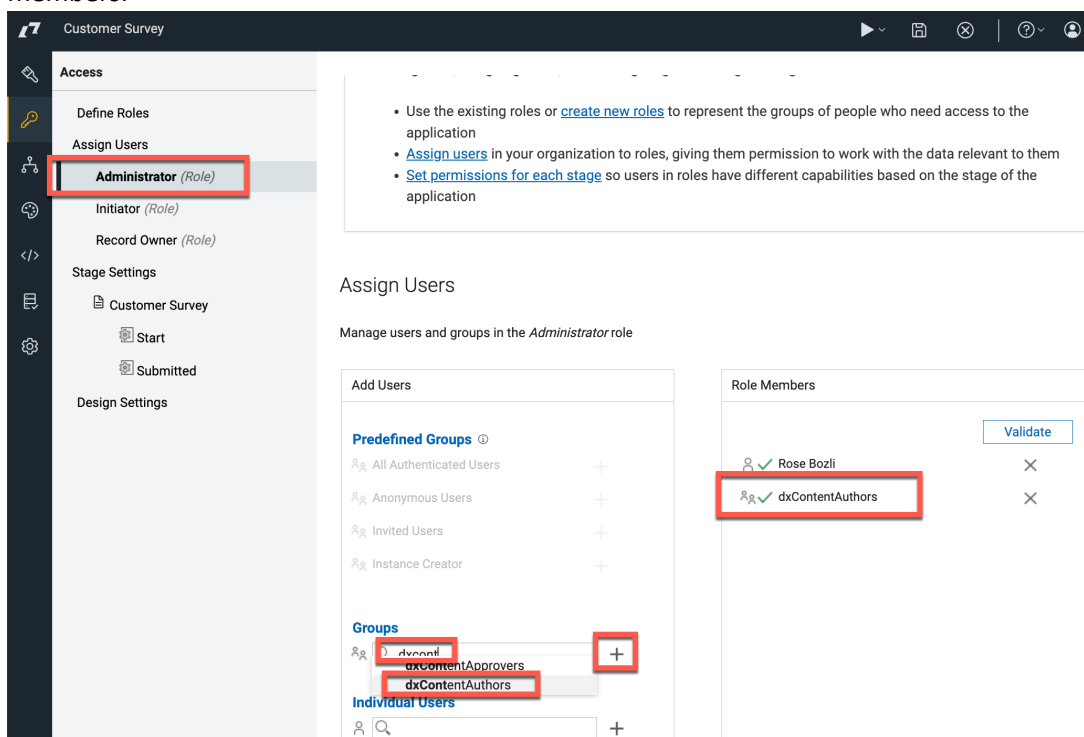
33. To change the message itself, click on **Workflow**. This is where you may set up the workflow for this application. You may change the message and perform activities, like sending an email to a specific person or group, or calling a service. Keep the default workflow and update the submit stage. Click the **Submit** stage and **Edit** the **Action Completion Message** and change the existing to **Thanks, you have been entered into the competition!**



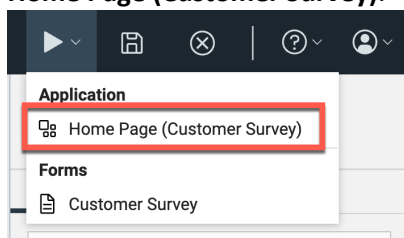
34. And finally allow anonymous users to use this. Go to **Access**, then under **Assign Users**, select **Initiator**, those who can initiate a form, and use the **+** to add **Anonymous Users** to the **Role Members**.



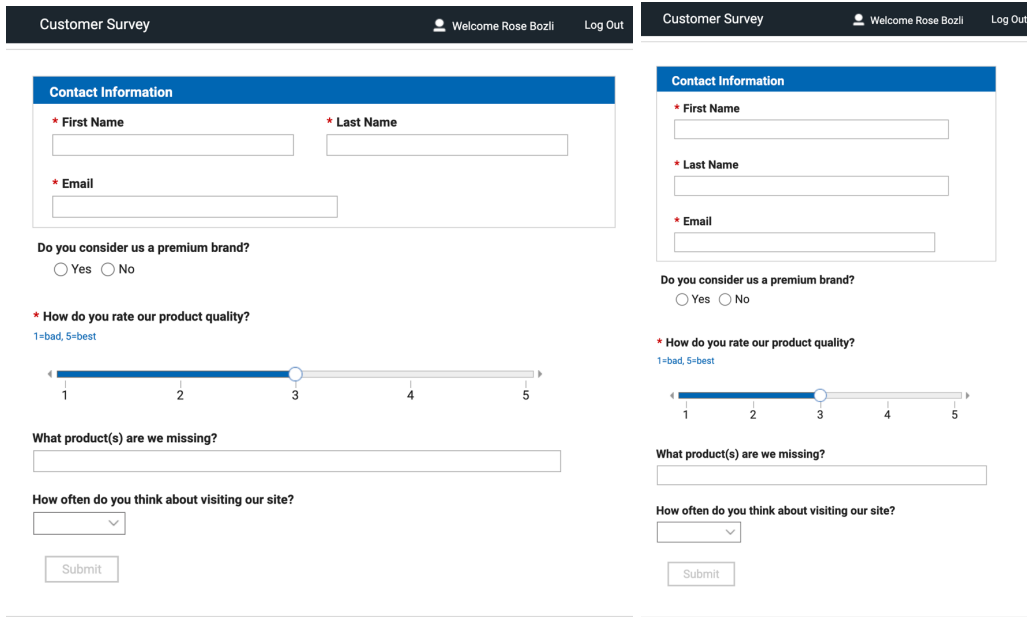
35. Also allow the full marketing team to see the results. Add the user group dxContentAuthors (all marketing team members) to the Administrator role. Click **Administrator**, then under **Groups**, search for **dxconten** and select **dxContentAuthors**. Use the **+** to add to the role members.



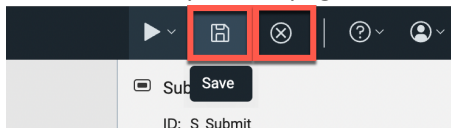
36. You can try it now with the preview action. Select the **Preview** icon and then Application **Home Page (Customer Survey)**.



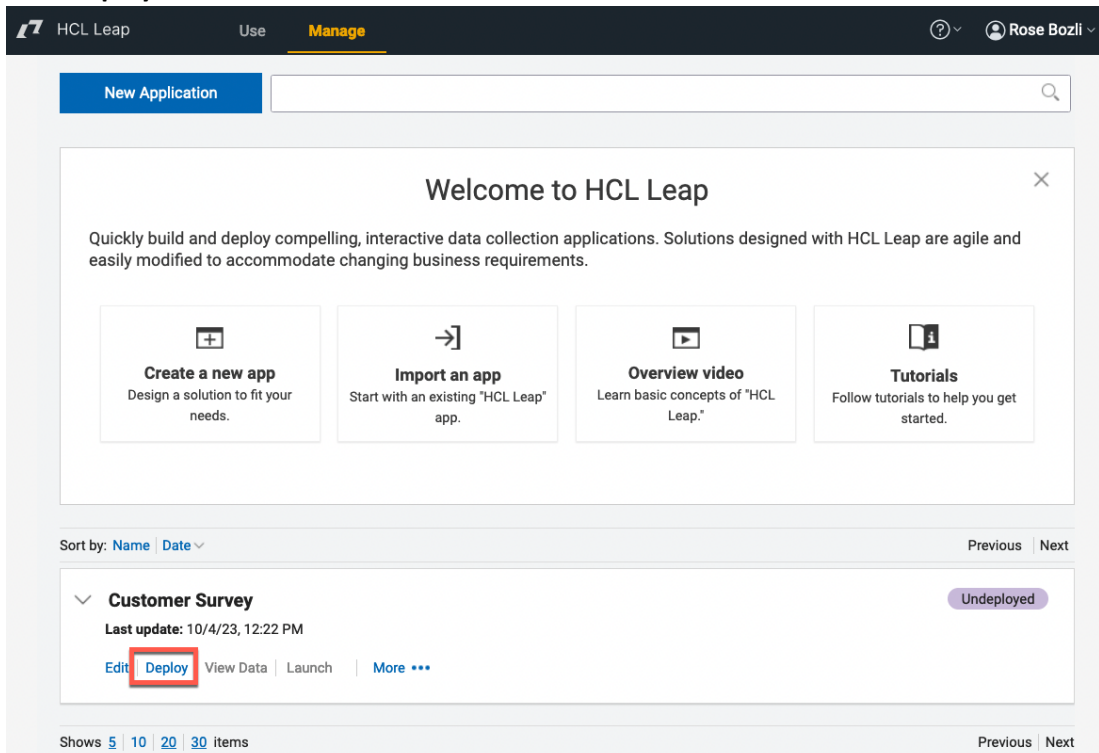
37. Test it. As you can see, you cannot submit it yet, as you are previewing it. You may notice that the Last Name appears under First Name, if you reduce the width of your screen.



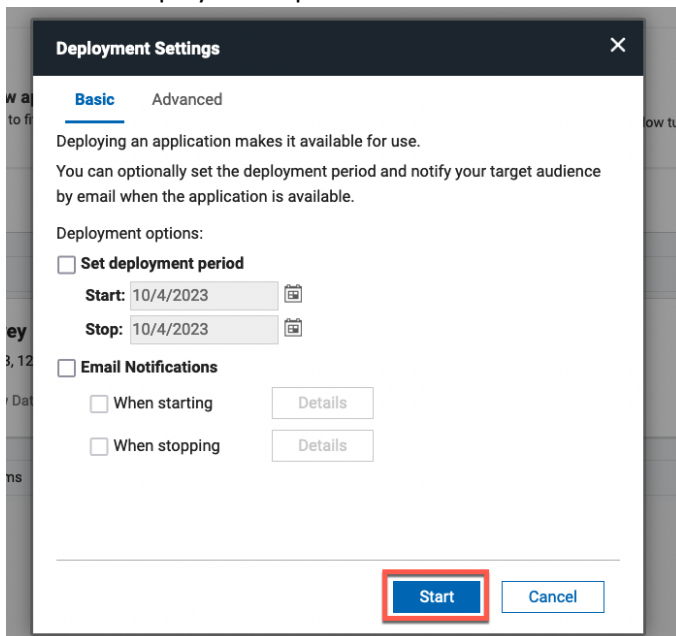
38. Then close the preview page, **Save** and then **Close** it.



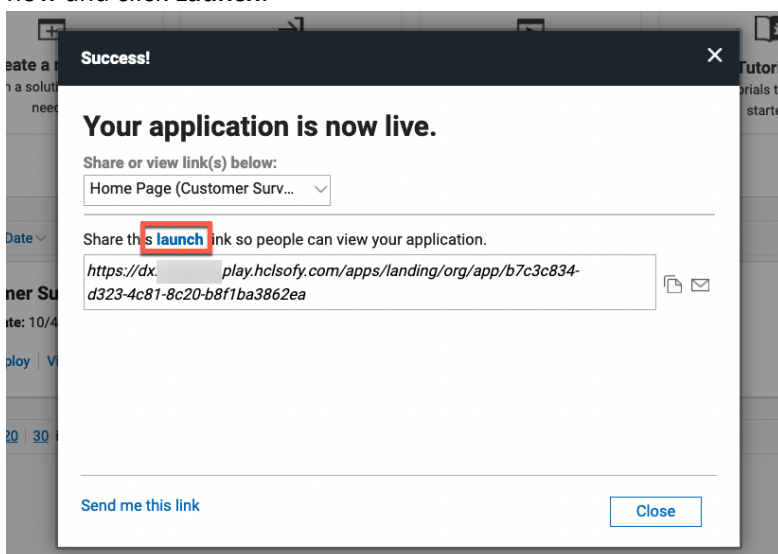
39. You are back in the **Manage** page. You see it is undeployed. Deploy it now, so you can use it. Click **Deploy**.



40. Leave the deployment options and click **Start**.



41. You see the notification that your application is now live, with the URL to access it. Check it now and click **Launch**.





42. Create your first customer survey entry and submit it. You may also use your own contact details.

Customer Survey Welcome Rose Bozli [Log Out](#)

**Contact Information**

\* First Name:  \* Last Name:

\* Email:

Do you consider us a premium brand?  
 Yes  No

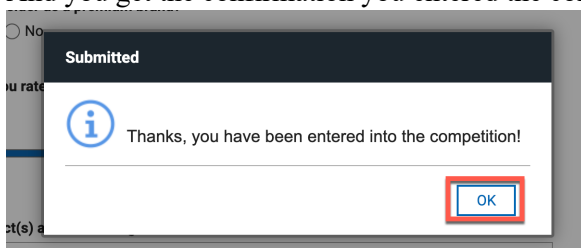
\* How do you rate our product quality?  
1=bad, 5=best

What product(s) are we missing?

How often do you think about visiting our site?

**Submit**

43. And you get the confirmation you entered the competition! Click **OK** to close.

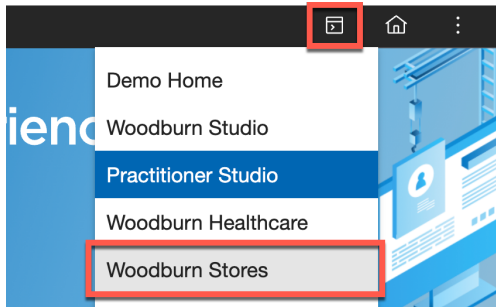


You have successfully built and deployed a new HCL Leap Customer Survey application and are ready to add this to the site.

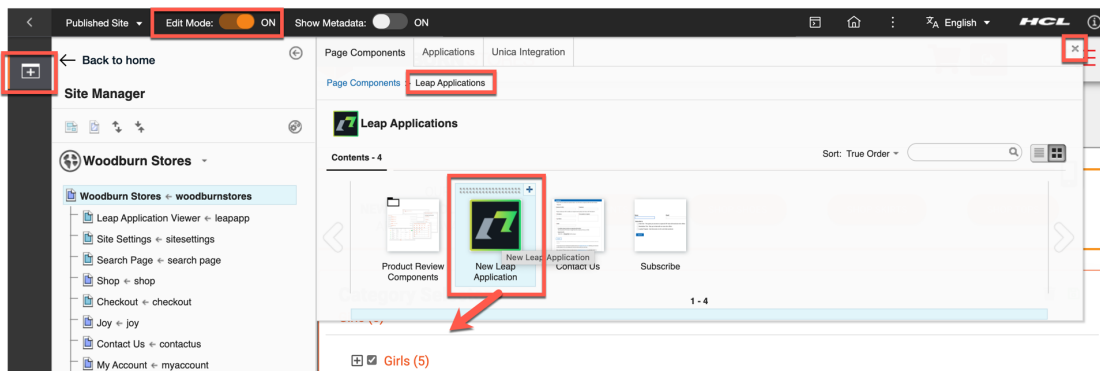
## Part 3: Add the Customer Survey Application to the Home Page

In this part, you will deploy your new application to the home page, customize it, target it to be hidden from employees, and try it out.

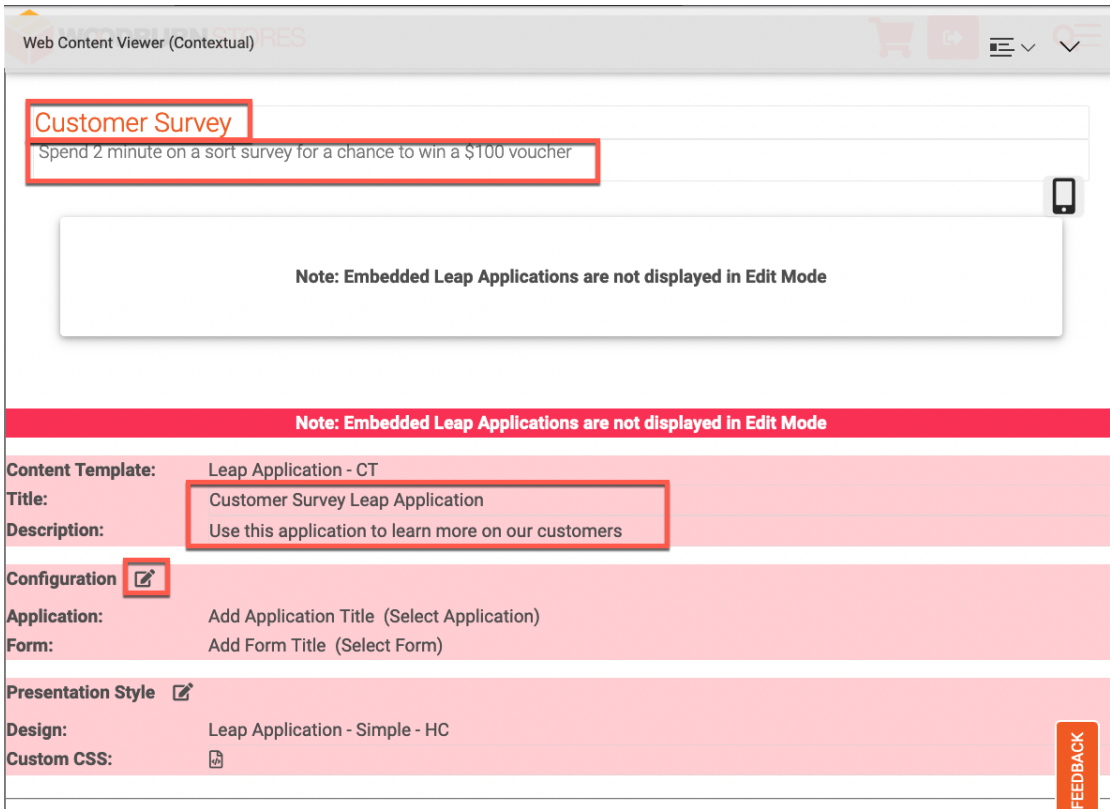
1. Go to your Woodburn Stores home page. Open the site menu and click Woodburn Stores.



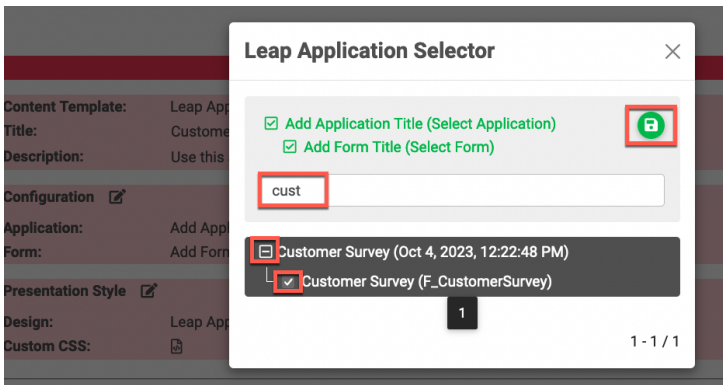
2. Then enable the **Edit Mode** to bring you in the What You See Is What You Get (WYSIWYG) mode. Open the **Add page components and applications**, open **Leap Applications**, notice some ready to use applications and drag & drop the **New Leap Application** to the top of the page. Then close it.



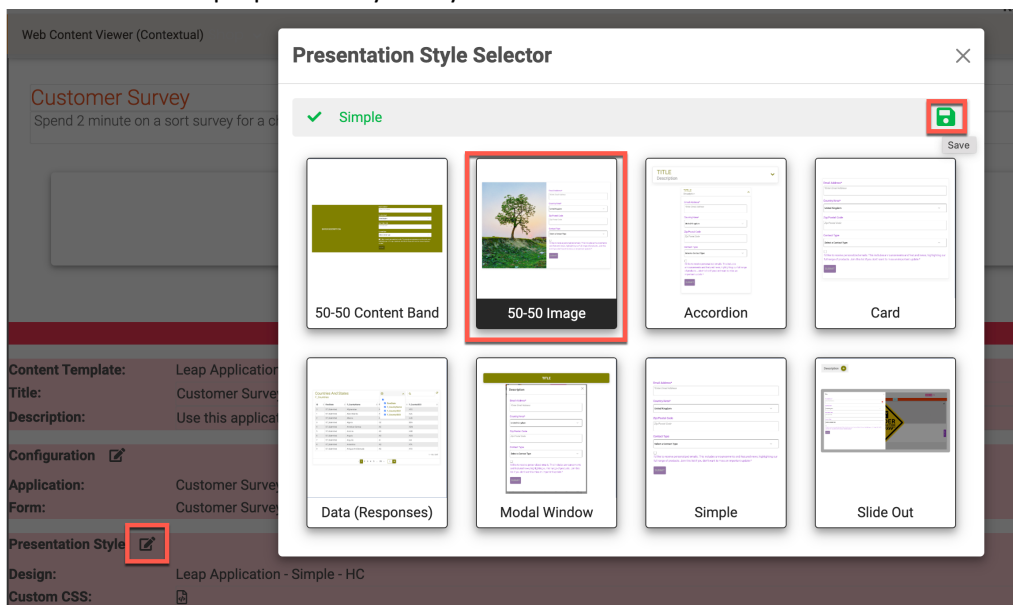
- Then update the Leap Application Page Component with your new application. Incite your customers to fill it out. Set the **Title** to **Customer Survey**, the **Subtitle** to **Spend 2 minute on a sort survey for a chance to win a \$100 voucher**, optionally update the meta-data **Title** and **Description** and then click the **Configuration Edit** icon to select your Leap application.



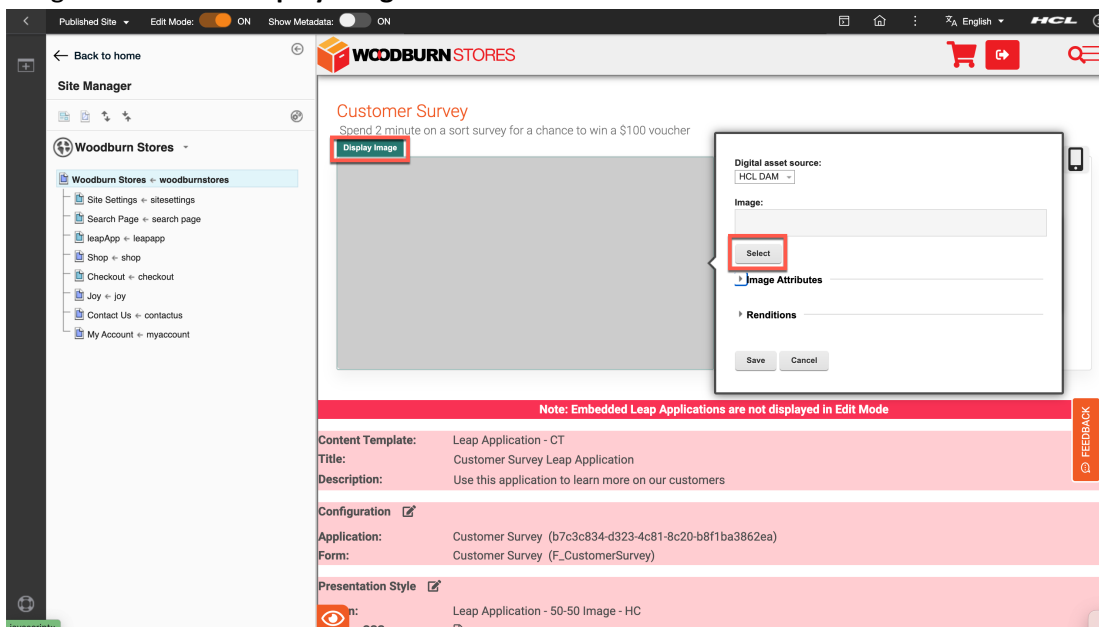
- The search for your **Customer Survey** application, e.g. with **cust**. Then expand it to show the forms and select the **Customer Survey (F\_CustomerSurvey)** form and click the **Save** icon to update.



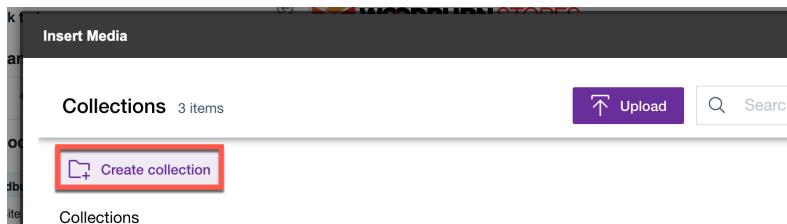
5. You see your updated configuration. Then change the presentation style. You want to show a nice image on the left and the application on the right. Click the **Presentation Style Edit** icon and change the Presentation Style from the default Simple to **50-50 Image**, which shows an image on the left and the application on the right with 50% of the screen size each. These have been prepared for your by the IT team. Then click the **Save** icon.



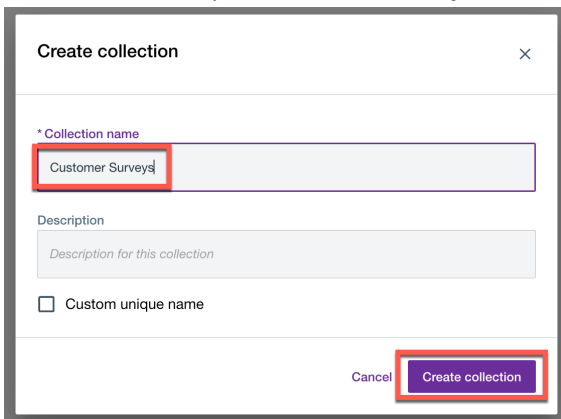
6. See how this changes the way your application shows. Also notice there is an option to manage custom CSS. This is more for very advanced users and developers. Now add an image. Click on the **Display Image** and then **Select**.



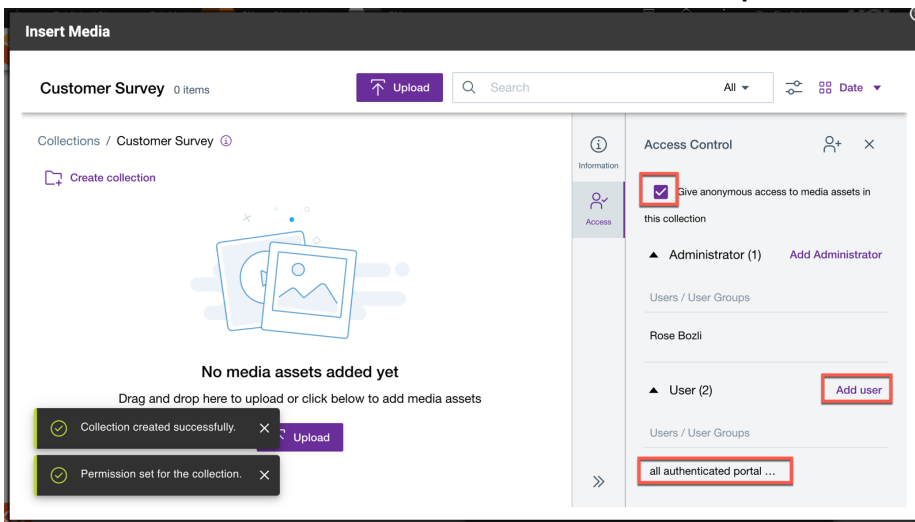
- If you have not created a good collection, do that now. Click **Create collection**.



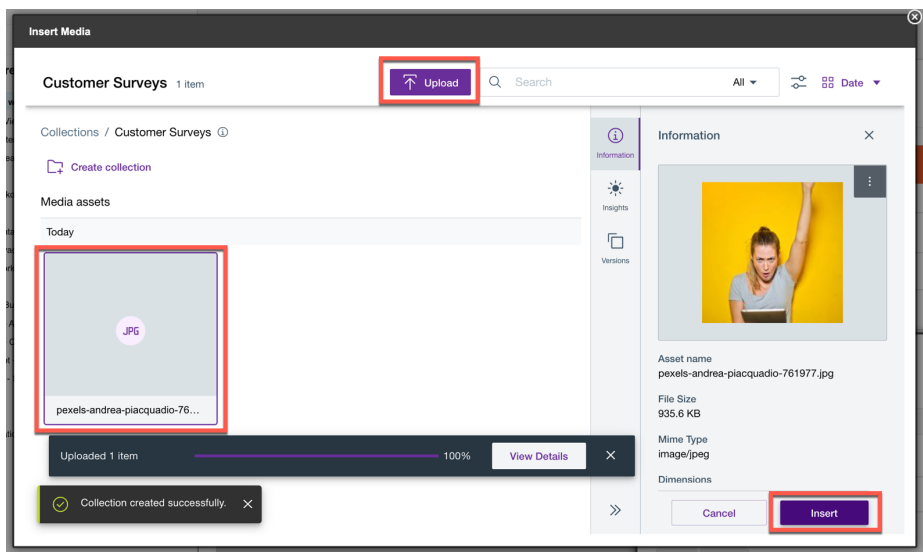
- Name it for example **Customer Surveys** and click **Create collection**.



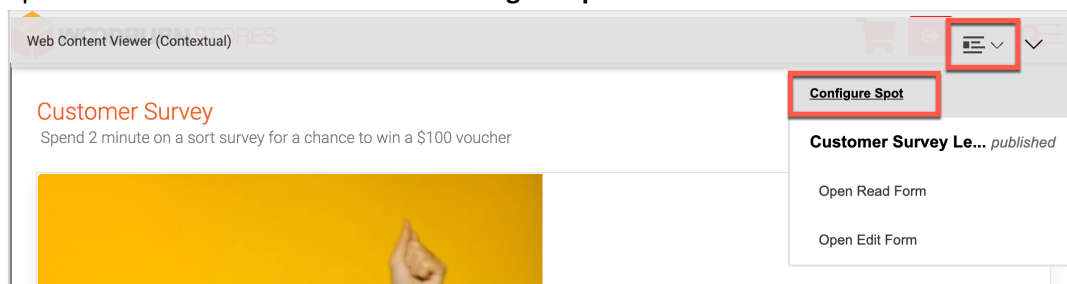
- Then ensure everyone has access to this new collection. Select **Give anonymous access to media assets in this collection** and add the **All authenticated portal users** to **User**.



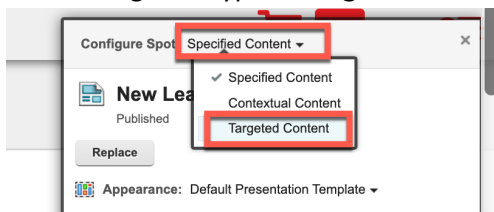
- Then add a nice portrait image. You may use free images, e.g. from pexels.com, like <https://www.pexels.com/photo/photo-of-a-woman-holding-an-ipad-761977/>. Upload, select and insert it. And then click **Save**.



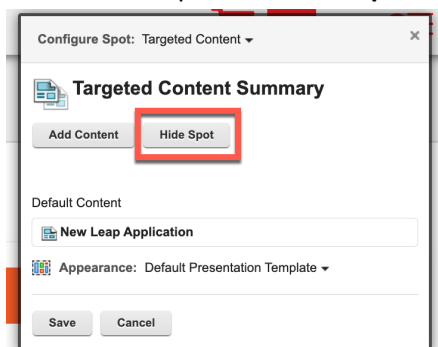
- Then make it only available to members who are logged in. Hover over the Page Component, open the content menu and click on **Configure Spot**.



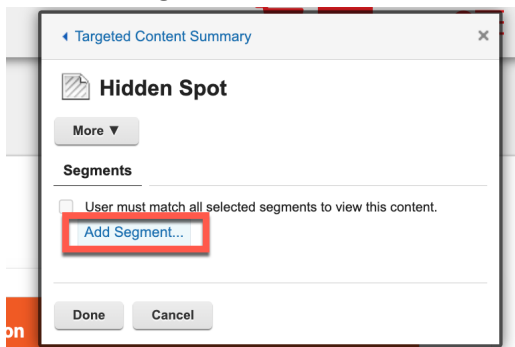
- Then change the type to **Targeted Content**.



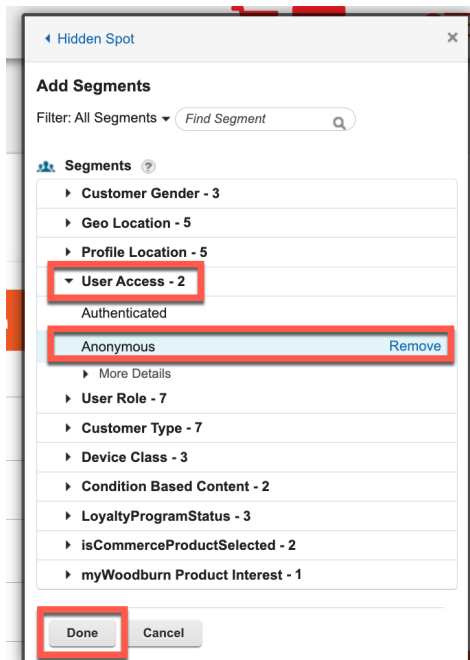
- And hide the spot. Click **Hide Spot**.



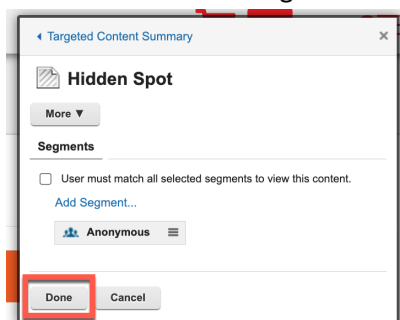
14. Then **Add Segment...**



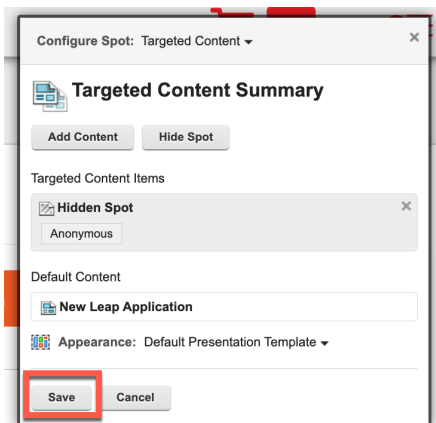
15. Under **User Access**, click on **Add for Anonymous** and then **Done**.



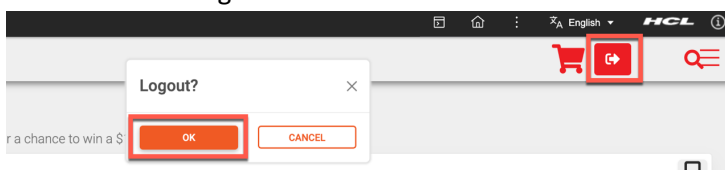
16. Check and click **Done** again.



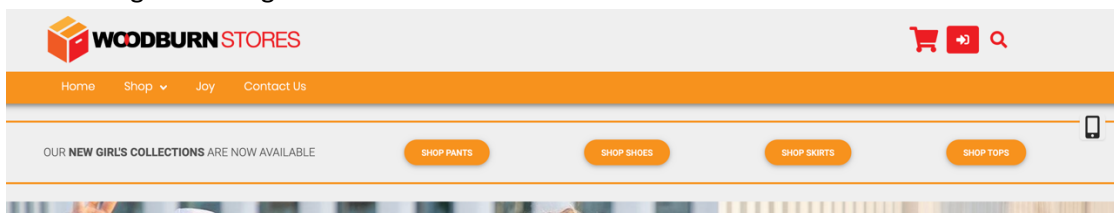
17. And Save.



18. Now test it and log out. Click **LOG-OUT** and confirm.



19. Is it no longer showing.



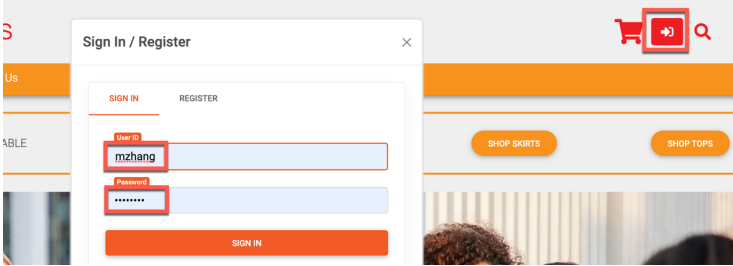
You have successfully added the new Leap application to the page, configured with a special look and feel with content, and made it hidden for anonymous users.



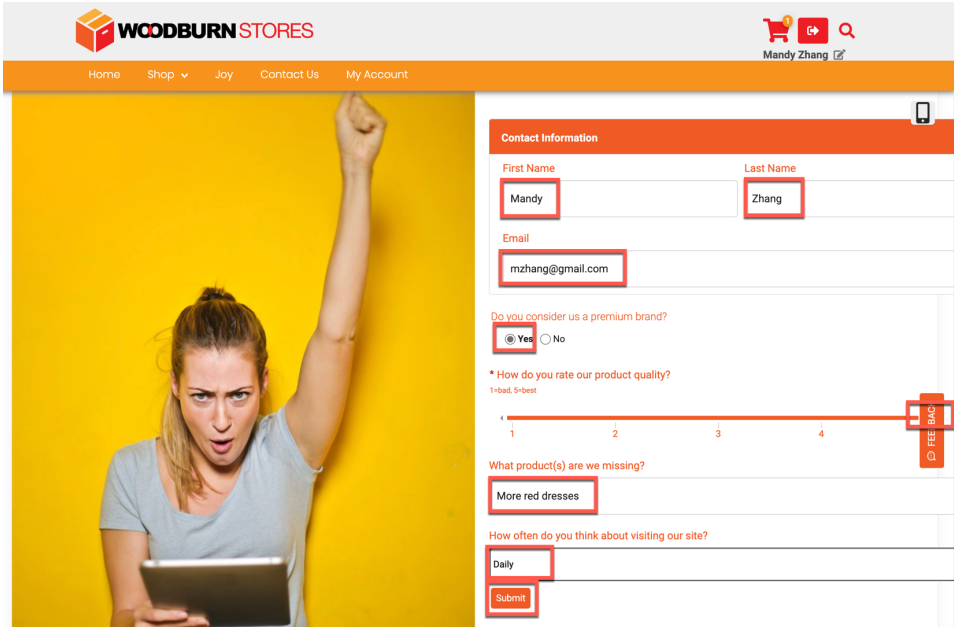
## Part 4: Use the Customer Survey Application

Then Mandy will use it as well.

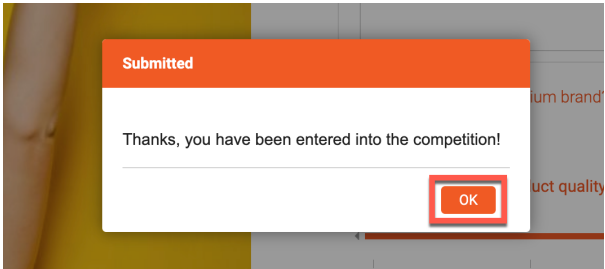
- 1. Now log in with Mandy again. Use mzhang / HCL-Dem0 to log in.



- 2. Fill out the customer survey and submit it. For example:



- 3. Great! You have also entered the competition. Click **OK** and then log out.

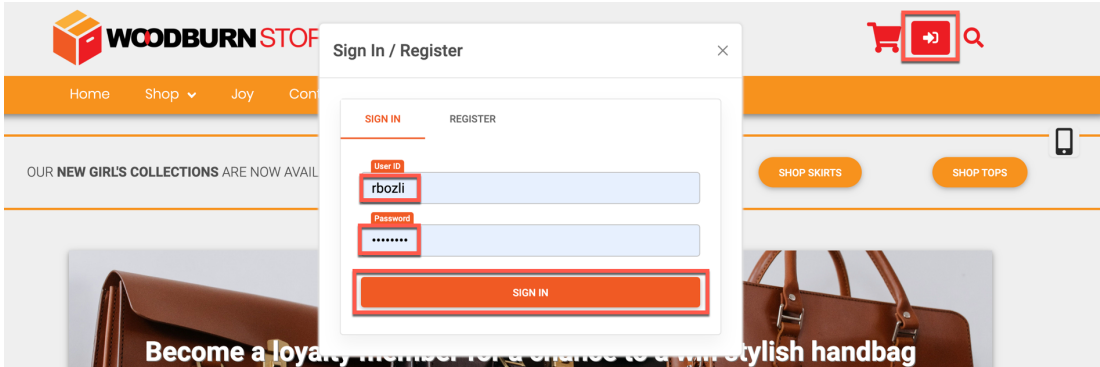


You have successfully participated to the new customer survey.

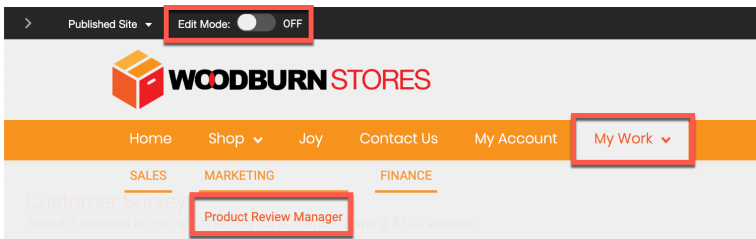
## Part 5: View Customer Survey Results

Then, as Rose again, you will check the progress on the feedback on both the Product Reviews and your new Customer Survey applications.

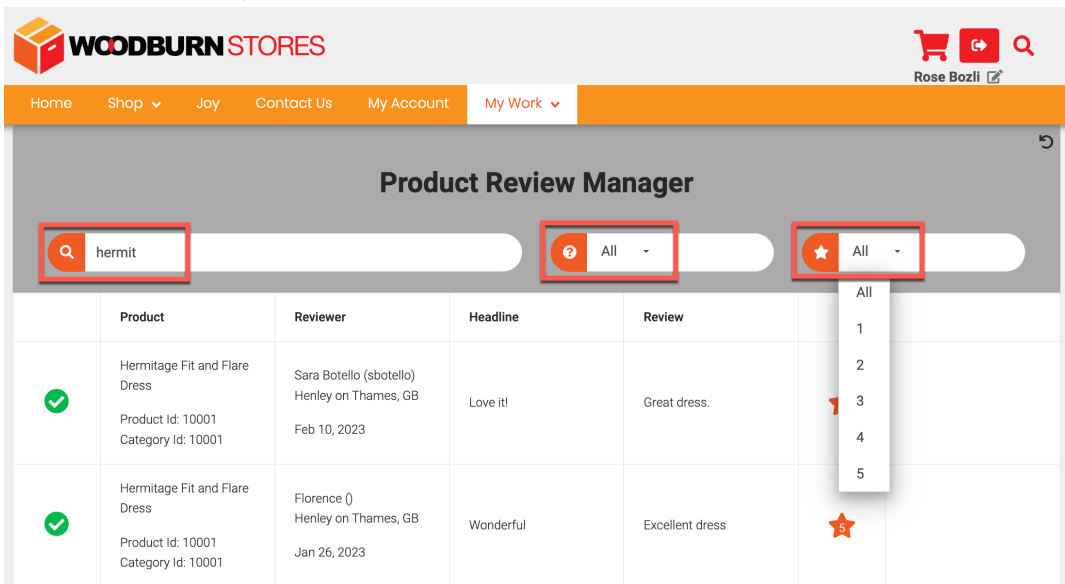
1. Log in as Rose. Click the log in icon, enter your credentials: User ID **rbozli** and Password **HCL-Dem0** and click **LOG-IN**.



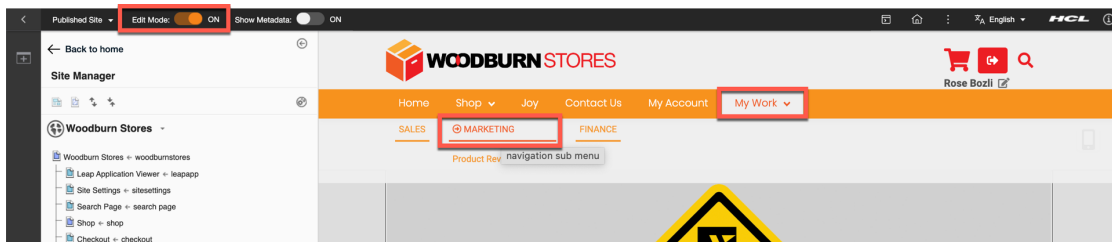
2. Then switch of the edit mode and go to **Product Review Manager** under **My Work – Marketing**.



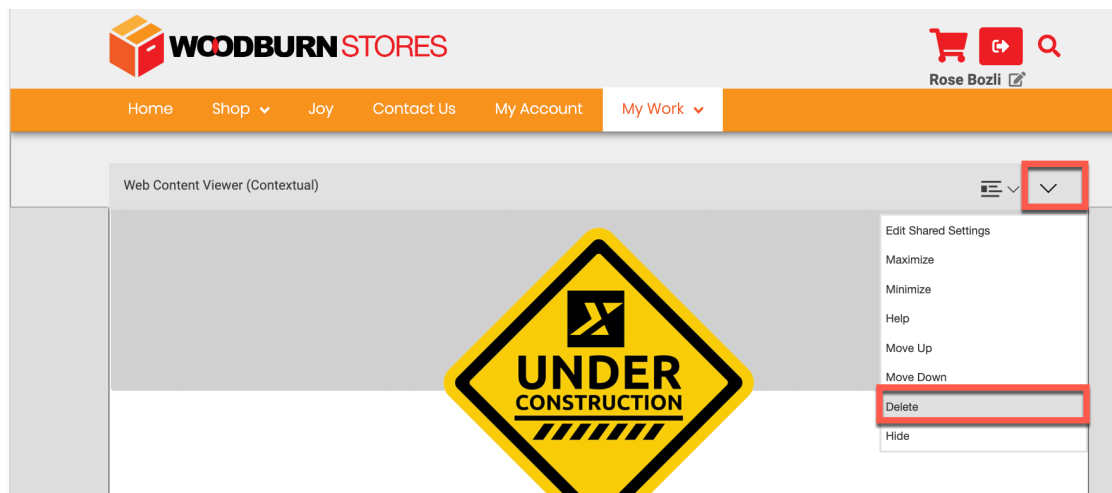
3. This allows the marketing managers to review and moderate all the product reviews. You can do a text search, search on status and number of stars.



4. Now go to your marketing page and turn on the edit mode.



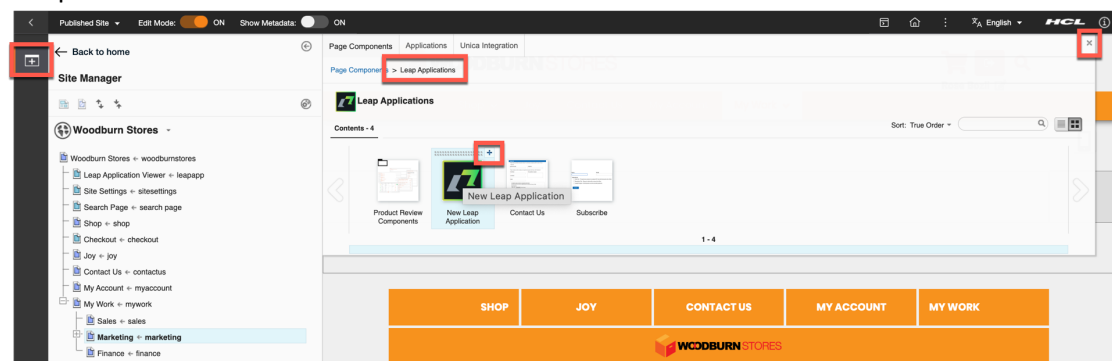
5. First remove this **Under construction** page component. Open the portlet menu and click **Delete**.



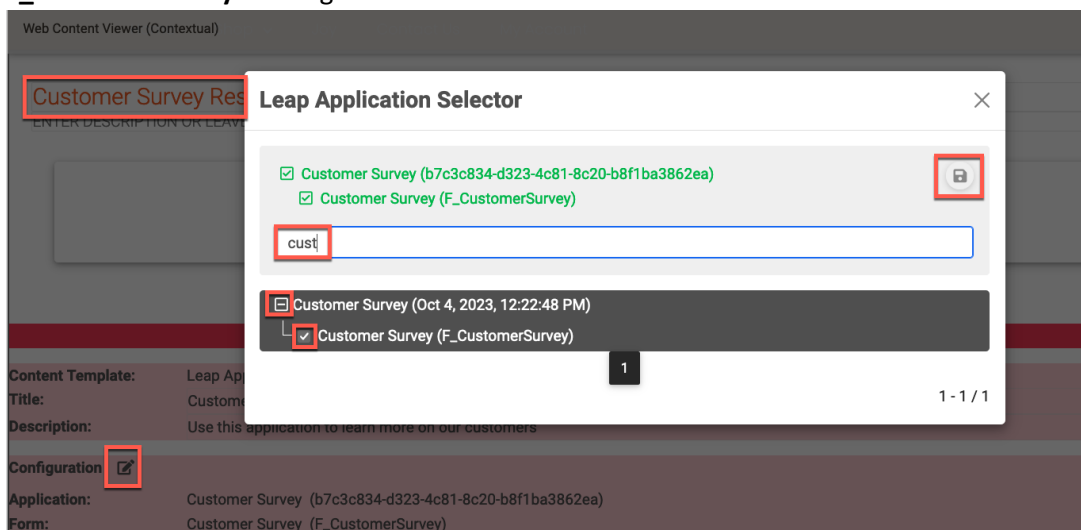
6. And confirm. Click **Yes**.



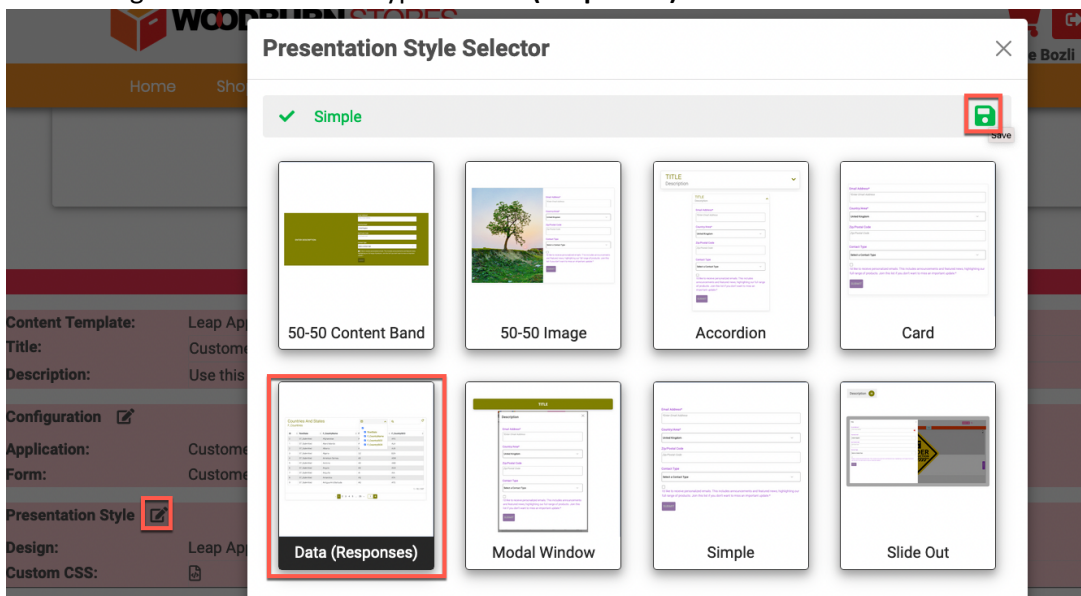
7. Then open the **Add page components and applications**, open **Leap Applications** and add a **New Leap Application** page component. You may use the +, as it will be the only page component. Then **close** the toolbar.



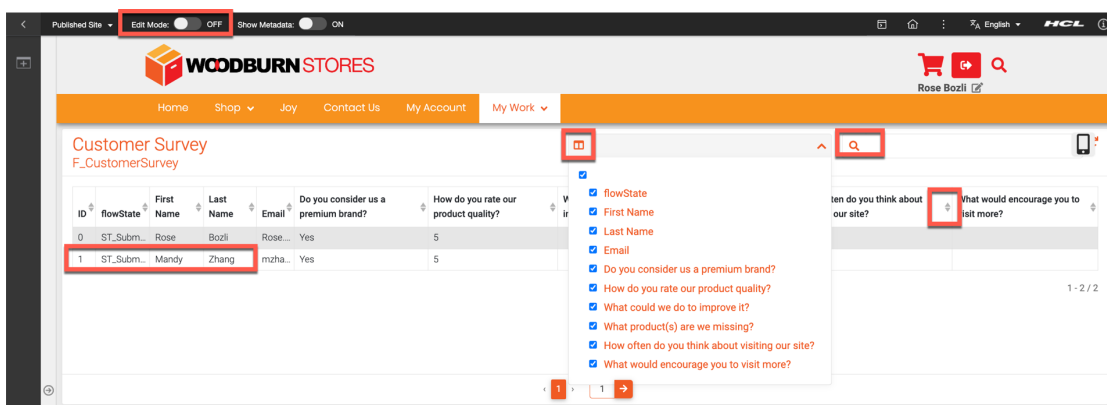
- Set the title to **Customer Survey Results** and configure it with the **Customer Survey / F\_CustomerSurvey** form again and click the save icon.



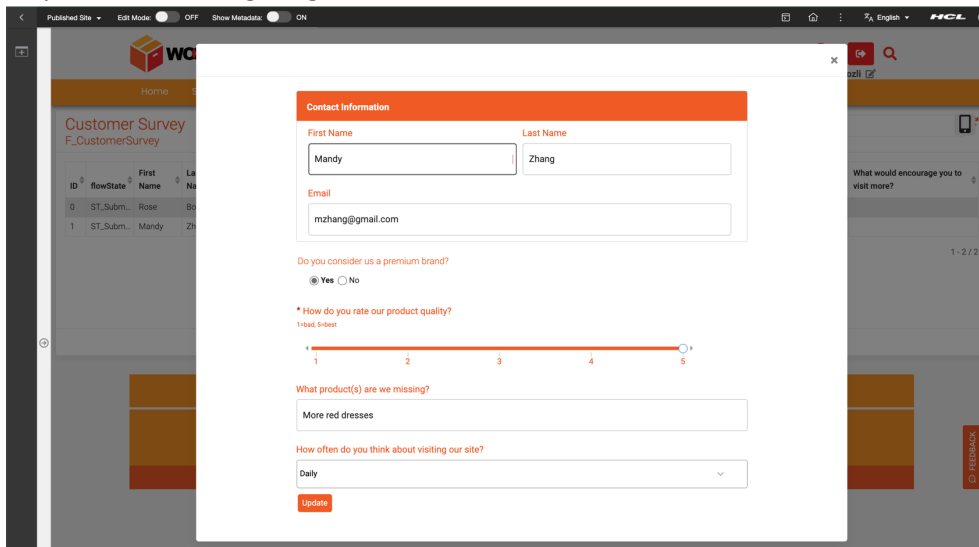
- Then change the Presentation Type to **Data (Responses)** and save it.



- Then switch off the **Edit Mode** and you see the current list of results. Notice you can select what fields to show, search through it, sort by field, etc. Click on the entry of **Mandy** to see what she shared.



11. As you can see, she gave great feedback.

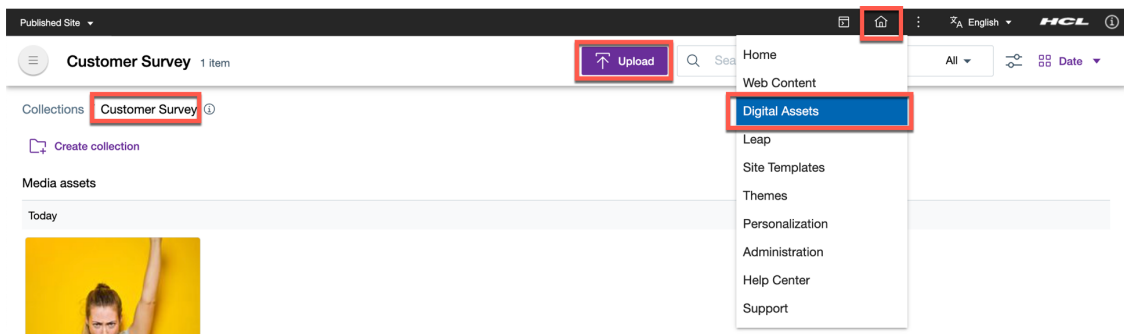


You have successfully discovered how to see the use of your applications in various ways.

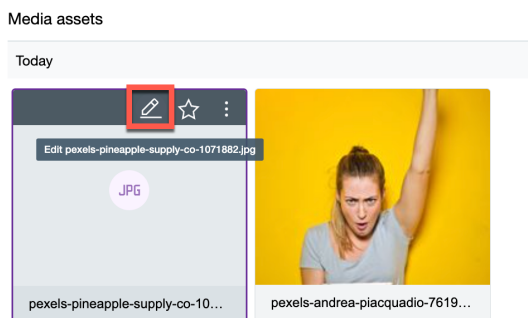
## Optional Part 6: Update Customer Survey Application with DAM Image

And to make the application more attractive, you'll add a new image to the top of the application, all with no help from IT.

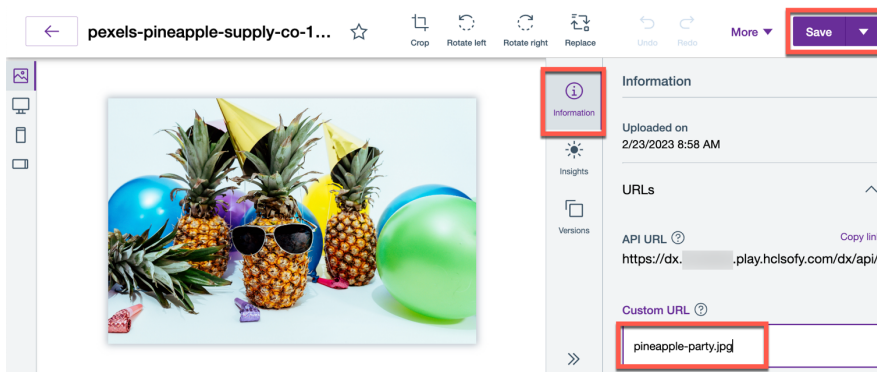
1. First add a new image your Customer Survey collection in the DAM. Go to the Practitioner Studio – Digital Assets, open you existing Customer Survey and upload a nice landscape image, e.g. <https://www.pexels.com/photo/photo-of-three-pineapples-surrounded-by-balloons-1071882/>.



2. Then edit the new image.



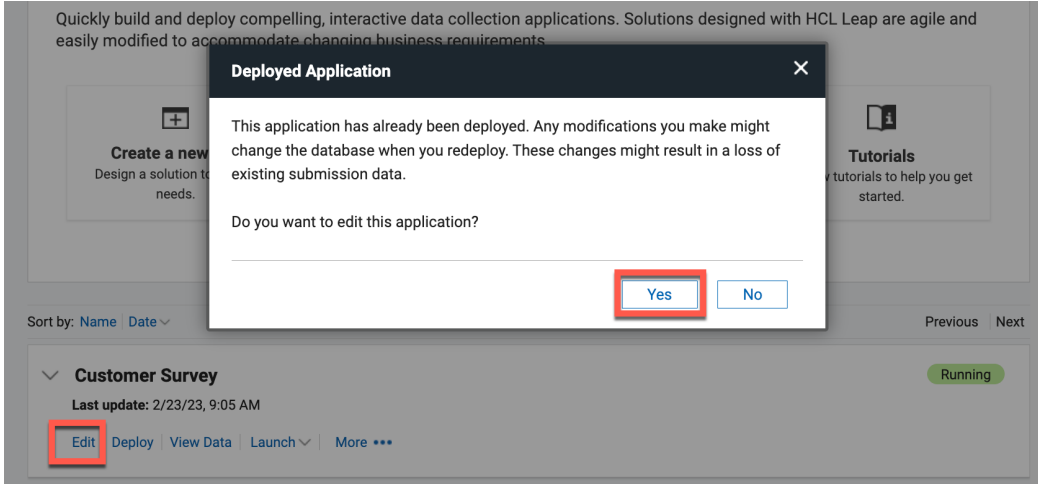
3. Open the information tab and give it a custom URL with jpg extension, e.g. pineapple-party.jpg. Then save it.



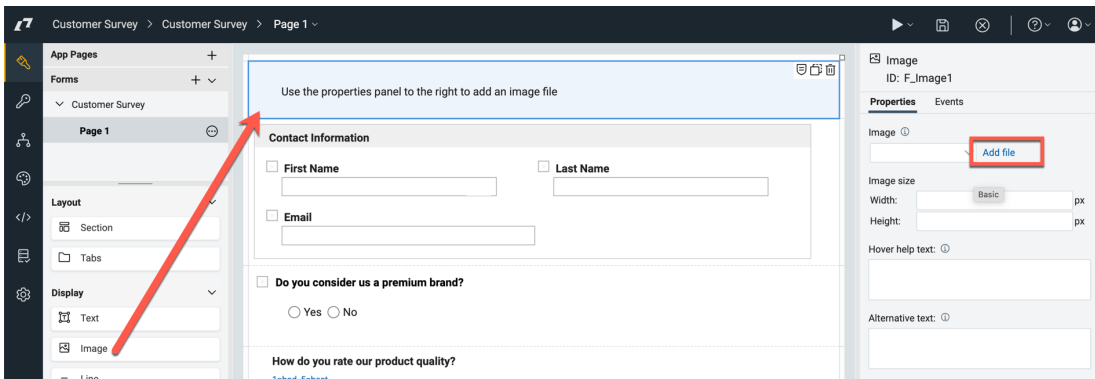
- Then copy the link and you can use it in your Leap application. Click **Copy link**.



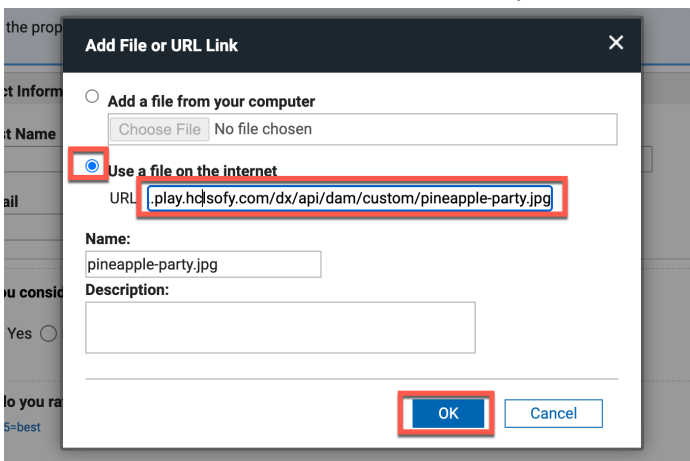
- Switch to your tab with Leap and edit your Customer Survey again. Click **Edit** and **Yes**.



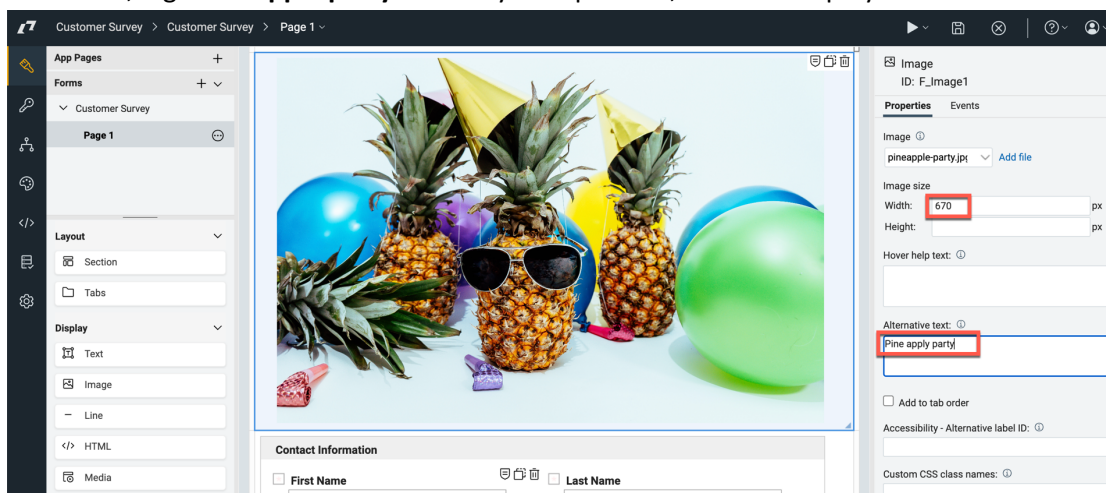
- Drag & drop a **Display – Image** to the top of your page and then click **Add file**.



- Then select **Use a file on the internet** and paste your copied URL under the **URL** field. The name should then be entered automatically. Then click **OK**.



- Then change the **Image width** to **670** pixels and add an **Alternative text**, to make it accessible, e.g. **Pine-apple party**. You may now preview, save and deploy it.



You have successfully used a DAM image inside a Leap application now.



## Conclusion

Using this lab tutorial, you have learned how easy it is to use HCL Leap applications in your DX sites. You learned how to build a new application, add it to a page, configure to show the way you want and manage additional information on them. You also learned how you may change the presentation to show all the results and see each individual entries.

You also learned how to use DX DAM images inside a Leap application.

## Resources

Refer to the following resources to learn more:

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

HCL Digital Experience on HCL Solutions Factory (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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