HCL Digital Experience

HCL Digital Experience
Getting Started Lab

HCLSoftware U

Creating a new generation of experts

Edition: June 2024

Herbert Hilhorst – herbert.hilhorst@hcl-software.com

Meghna Pradhan – meghna.pradhan@hcl-software.com

Table of Contents

Author(s)

This document was created by the following Subject Matter Experts:

Herbert Hilhorst **Company: HCL**	**Bio** Herbert Hilhorst is an HCL Digital Experience (DX) Technical Advisor at HCL. **Contact: herbert.hilhorst@hcl-software.com**
Meghna Pradhan **Company: HCL**	**Bio** Meghna Pradhan is a DX Trainer with HCL with an extensive experience working on all fronts of HCL DX. **Contact: meghna.pradhan@hcl-software.com**

Introduction

This hands-on lab guides you in getting started on HCL Digital Experience (DX) platform. You will explore the HCL Digital Experience (DX) Solution Modules using the following two roles:

Mandy Zhang, consumer, based in Boston (USA)

As 'Mandy', a consumer of Woodburn, you will first discover the retail demo site 'Woodburn Studio' as a visitor. You will download the site locally, and provide some feedback. Then you will log in and see how the site adapts to you with additional pages and content.

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

Then, you will change roles and log on as a Marketing Rep, 'Sara'. You will first check what Mandy was seeing, and based on that, make some changes. You will change existing content, add a page and update its default content, add a component and target it to be hidden for employees and ensure it works will on different devices, with no help from IT.

Prerequisites

1. SoFy sandbox with DX Solution Modules deployed.
2. 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>
DX Login (Consumer Mandy Zhang)	mzhang	HCL-Dem0
DX Login (Marketing Rep Sara Botello)	sbotello	HCL-Dem0

Lab Overview

In this lab, there are four different parts managing your getting started experience. These are shortly introduced now.

### Part 1: Engaging Experiences

As a consumer, Mandy, you will explore the different pages of the Woodburn Studio site anonymously first and download the site as a standalone application.
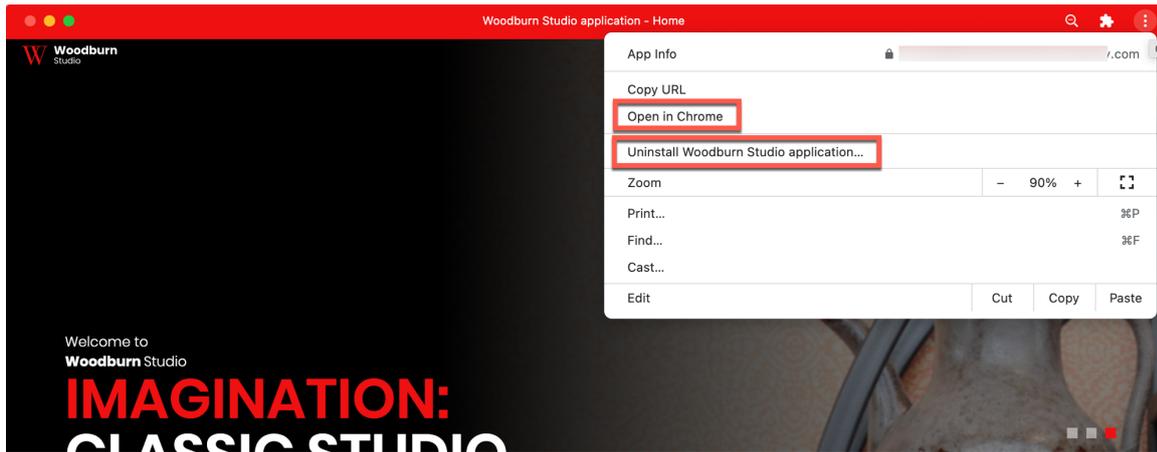

Part 2: Personalized Experiences

Then you will log on and see an additional MyWoodburn page that is personalized to you, based on our your profile, role, geolocation and navigation history.

You will discover one of the products and discover its name is strange and report this using the feedback form again. As the feedback is not positive, it will trigger an alert that is sent to Sara, the Marketing Rep with the information of the visited page and your feedback.
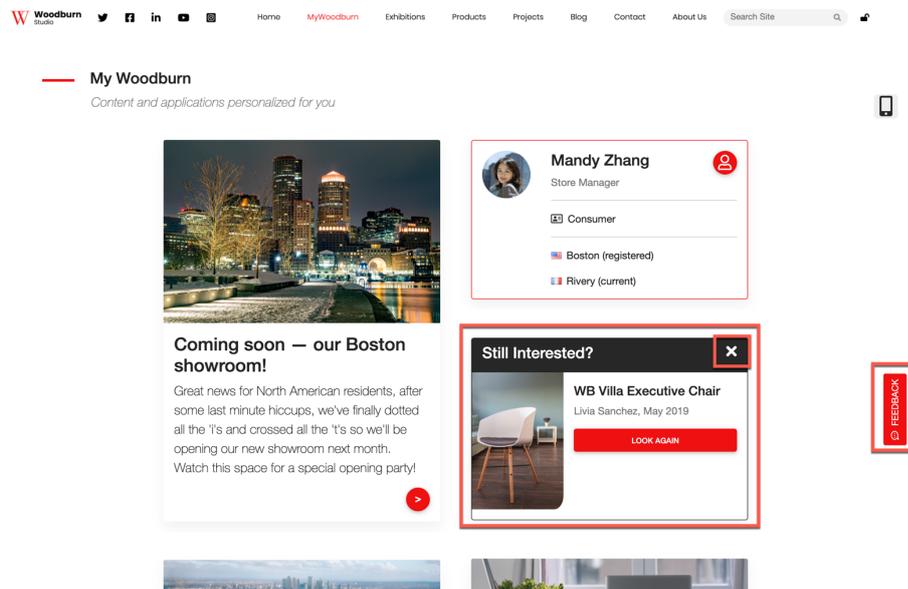
Part 3: Business User Content Management

Then you will log in as Sara and notice that the MyWoodBurn page now shows very different information. You will investigate what Mandy was seeing on the MyWoodBurn page and go to the product page, notice the product name and correct it.
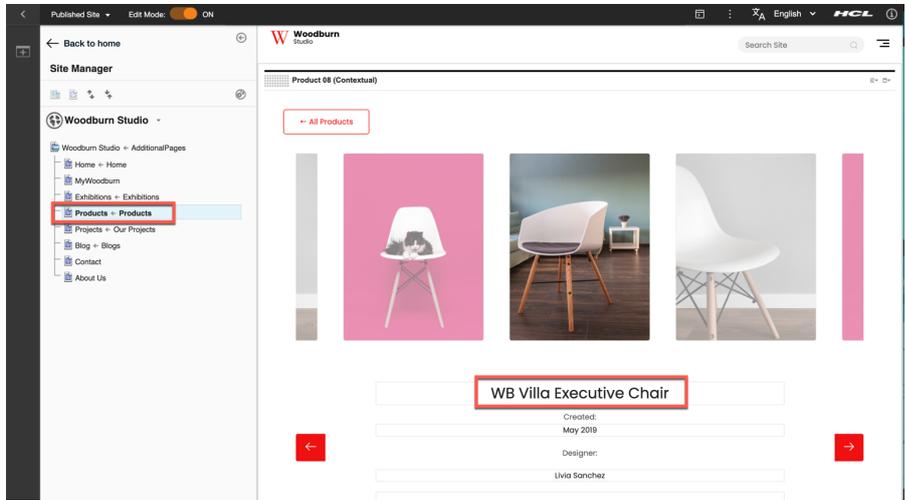

Part 4: Business User Page Creation

Finally, you will need to promote a new sofa with a new Stretching Out page. You will update it with relevant images and content. And you will add information of its designer, which should not be visible to employees, as everyone knows this already. It will look like this.
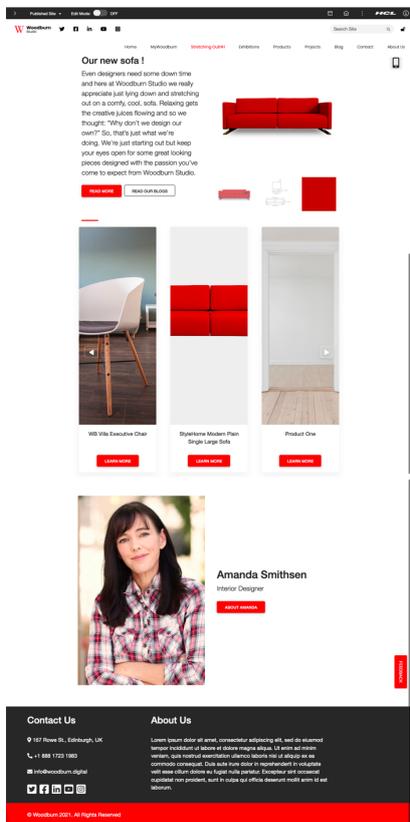
And finally, you will test if this works correctly on all devices, like a mobile and tablet:
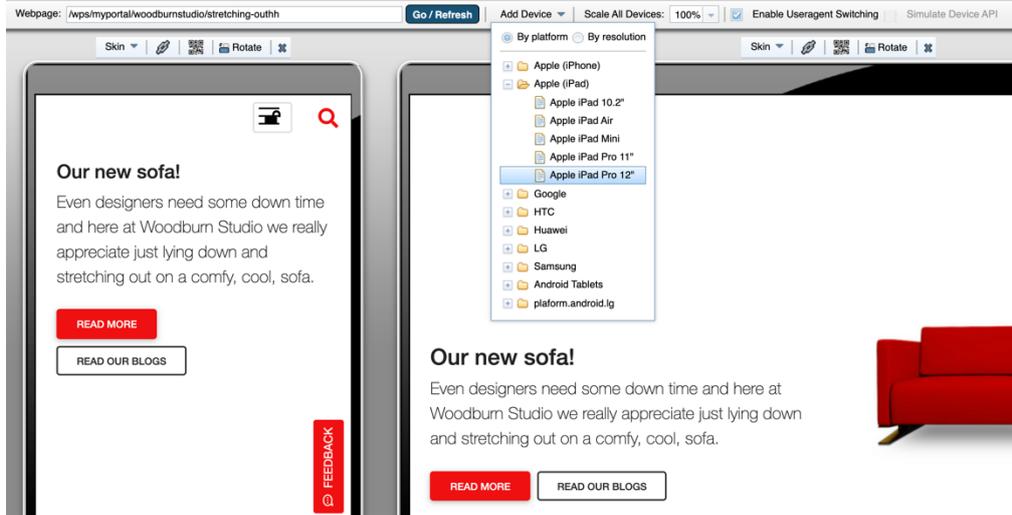

Let's get started!

Part 1: Engaging Experiences

As a consumer Mandy, you will explore the different pages of the Woodburn Studio site.

Then you will provide positive feedback on the site using the feedback form and you will be requested to log in and visit the MyWoodBurn page.

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**.
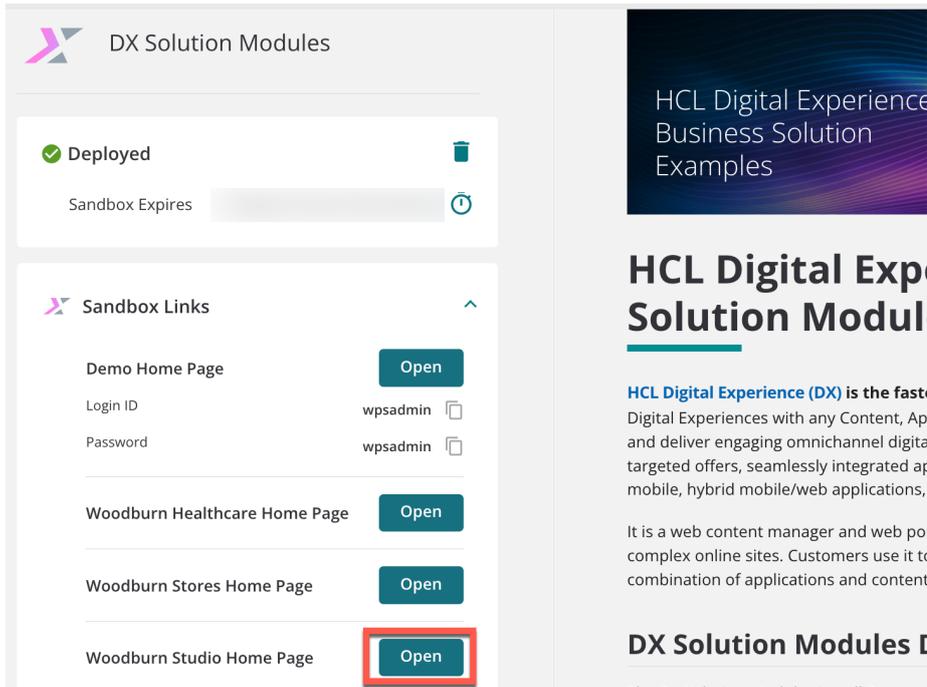

2. You will land on the **Home** page of Woodburn Studio site. Take your time to explore the different pages of the site – Exhibitions, Products, etc. Notice you can directly explore it in this page. However, you will open it in a new tab to have more space using it. You may use **CRTL +** and **CRTL –** 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.
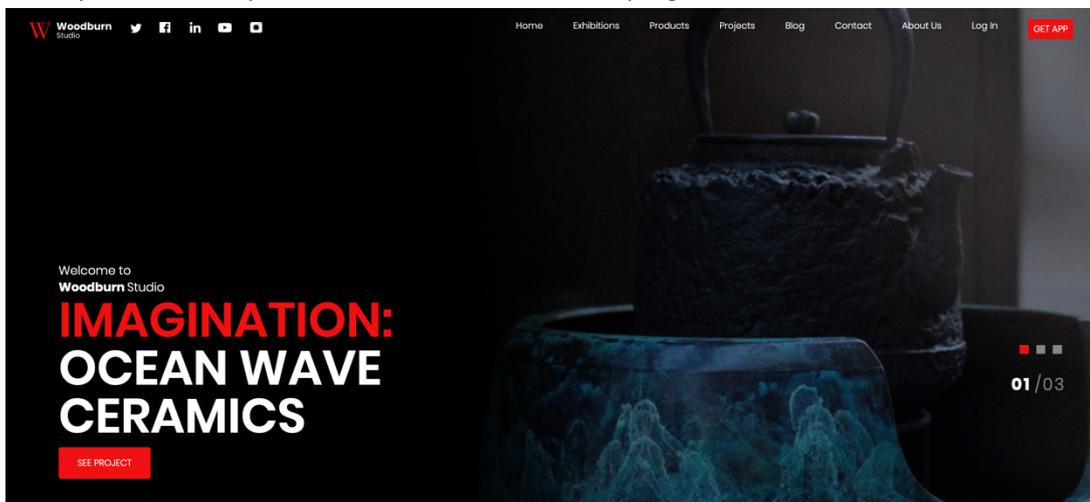
3. You like this site and want to download it as a standalone application. This allows you to use it offline, when you are not connected. You can run this on your desktop, your tablet or mobile. Here are instructions for a desktop installation. Use a navigator that supports PWA, like Chrome and click on **GET APP**.
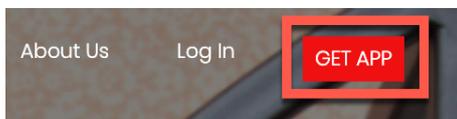
4. Then click **Install**.
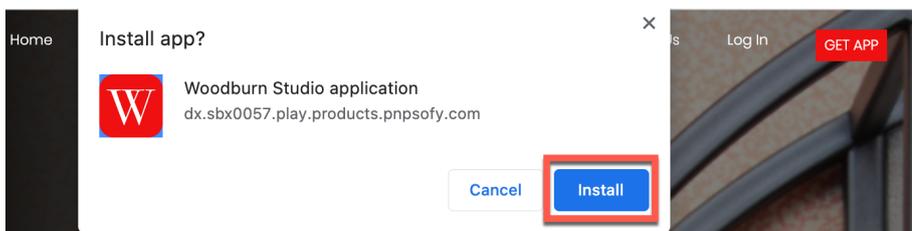
5. And then your local application should be up and running. Have a look around again. If you are disconnected, you will be able to continue to use the application and content. It is now a copy of the site, but it is possible to specify what should be available in this standalone application. In the rest of this lab, you will work on the desktop. Hence, you may use **Open in Chrome** (if you installed it from there) to continue online on a web browser. Note that you can also uninstall it here.
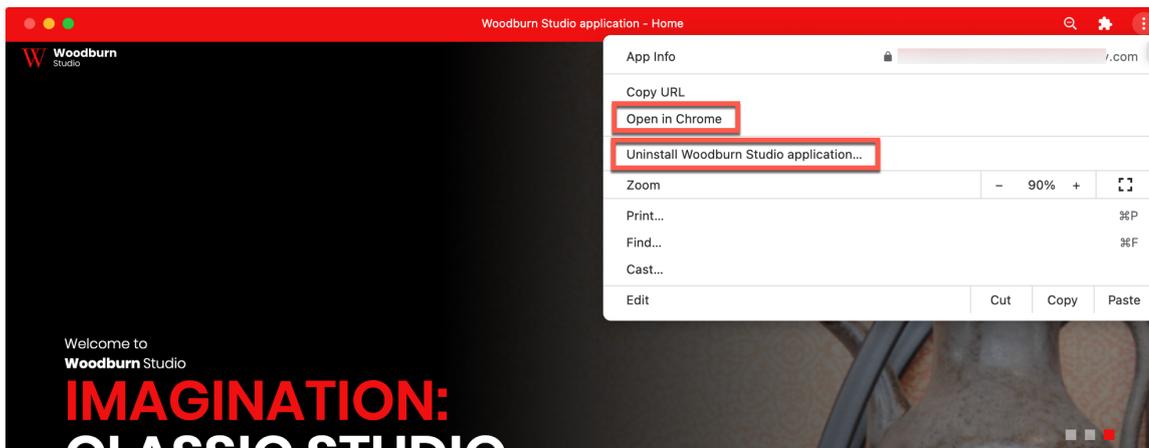

You have successfully discovered the Woodburn Studio.

## Part 2: Personalized Experiences

Now you will login and see an additional MyWoodburn page that is personalized to you, based on our your role, geolocation and navigation history.

You will go one of the products and discover its name is strange and report this using the feedback form again. As the feedback is not positive, it will trigger an alert that is sent to Sara, the Marketing Rep manager with the information of the visited page and your feedback.
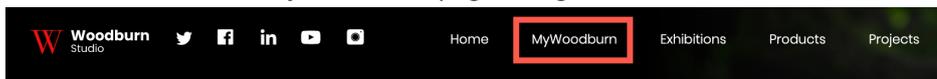
1. So let's log on. Go to the web browser and ensure the Woodburn Studio site is opened. Then, from the top navigator on the Woodburn Site, click on **Log In**:
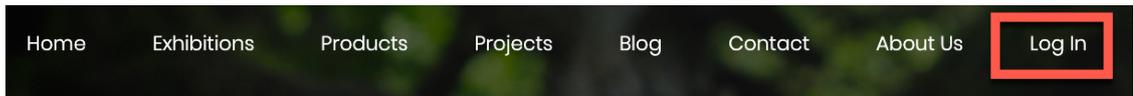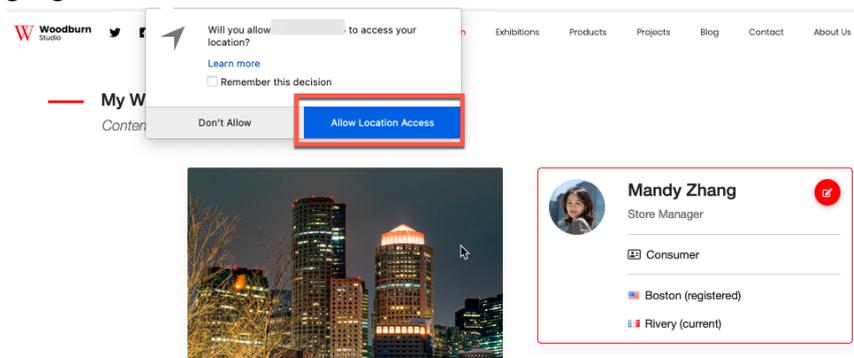

2. Your login credentials are **User ID: mzhang, Password: HCL-Dem0**
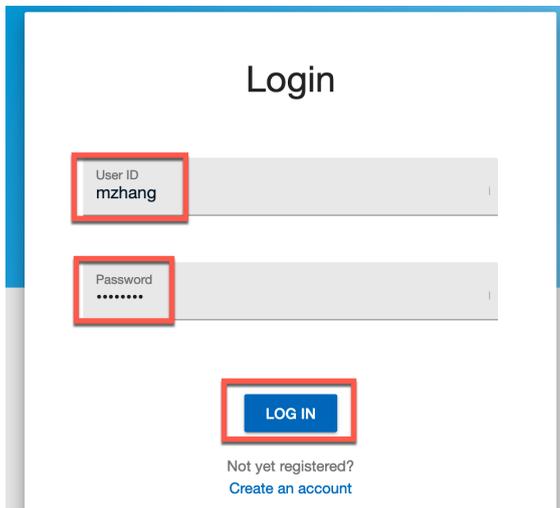
3. Then notice the new **MyWoodBurn** page and go to it.

4. When you open the page, it will ask your location. Select **Allow Location Access**, so you may get geolocation based content.

5. On the top of the page, you will see information based your registered location (Boston for you) in 1, your profile with your name, title, role, registered and current location in 2. In 3, you see any personalized information based on our geo-location only if you are currently in a different geo then the one of your profile. 4 shows device, e.g. Desktop, Smartphone and Tablet based information. And on the bottom, you will find a personalized list of products that should be of interest to you. This is because you are identified as a consumer. Notice the chair on the left and click on its **LEARN MORE** to see more details on this.
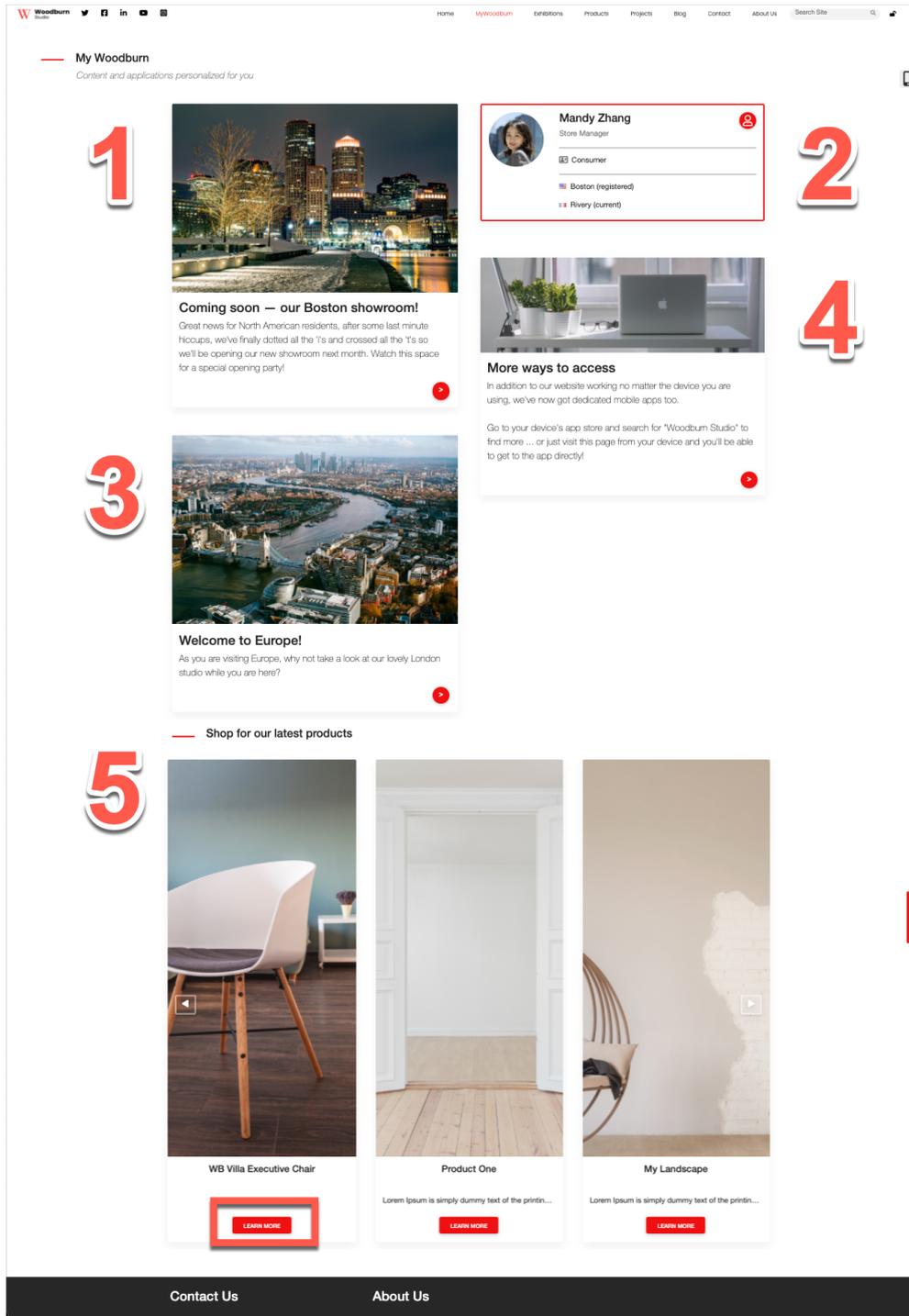
6. This brings you to the 'Products' page with more details on this chair. The title of the chair seems a bit weird. Go back to (click on) the **MyWoodBurn** to check if this is right.
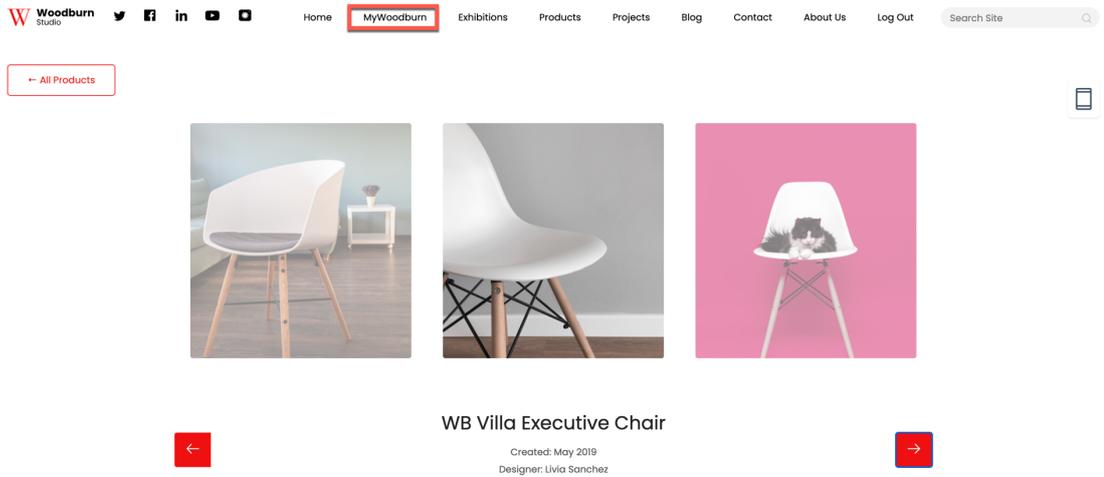

7. You will notice that an additional message now appears, to check, if you are still interested in this chair. The site starts to learn more on you and adapts based on your navigation. Now give the feedback that you think the name of the chair should be changed. Clear this **Still interested** notice (page component), click on its '**x**' and then click **FEEDBACK**.
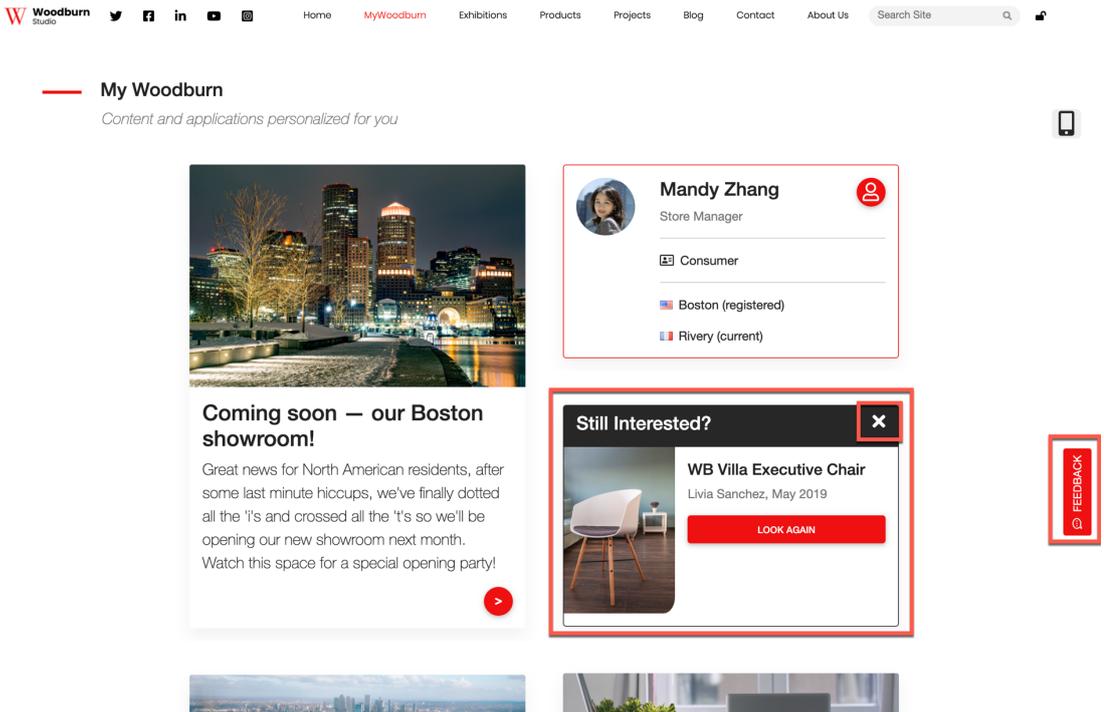
8. This allows you to easily provide feedback. It uses your account information to complete the name and email address. Enter the feedback about your doubt of the chair name, e.g. with **'Is the name of the chair correct?'** and send it. Click **Send** to share. It will then use your feedback and call a webservice (Google Cloud Natural Language API) to understand the sentiment of your feedback. As this is not positive, it will trigger an alert for the marketing team.
(Btw. in this demo environment, there is no mail server set up, so don't expect an e-mail).

9. Then close the feedback.
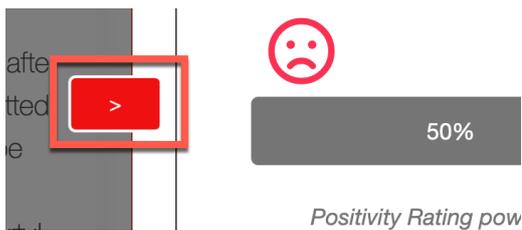

10. And then log out.
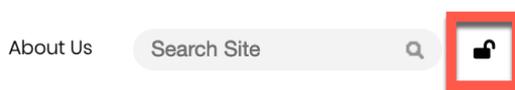
You have discovered that as a consumer this site is highly personalized and engaged with you.

Part 3: Business User Content Management

In this part, you will act on the alert created by Mandy. You will play the role of Sara, who is the Marketing Rep and responsible for the content of this site. You will log in as her and will discover a very different MyWoodBurn experience page with very different information. You will use impersonate to see what Mandy was seeing on the MyWoodBurn page. Then you go to the product page and update the product name.
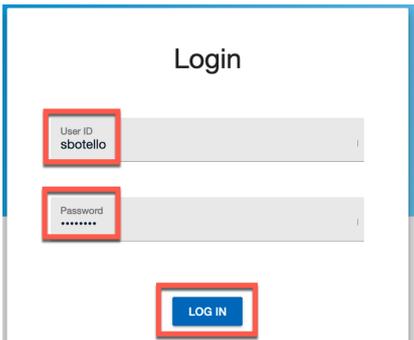
1. Use a different browser for your Sara session (or log out on your current browser using 🔓) and go to the WoodBurn Studio site.
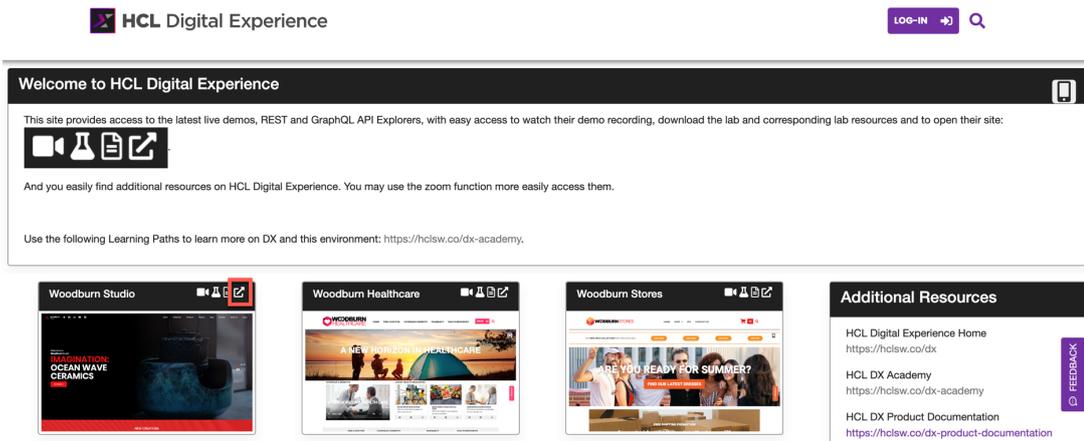

2. There login again. Click on **Log In**.
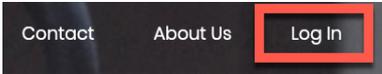
3. And now login as the Marketing Rep **Sara**, using **User ID: sbotello** and **Password: HCL-Dem0** and go the Woodburn Studio site again.

4. Now again go to the **MyWoodburn** page and notice that it now adapts to your profile. As you are an employee, registered in Madrid and depending on where you are located (on this screenshot in France, so not showing additional European content), you will see very different information. You now want to check what Mandy was seeing. For that you will use impersonation. You know she was a consumer, so you will preview the site with a user role that matches a consumer. Open the menu and under Preview, select **As User…**. Note that you cannot preview as an unauthenticated user on this page, as it is not accessible to anonymous users.
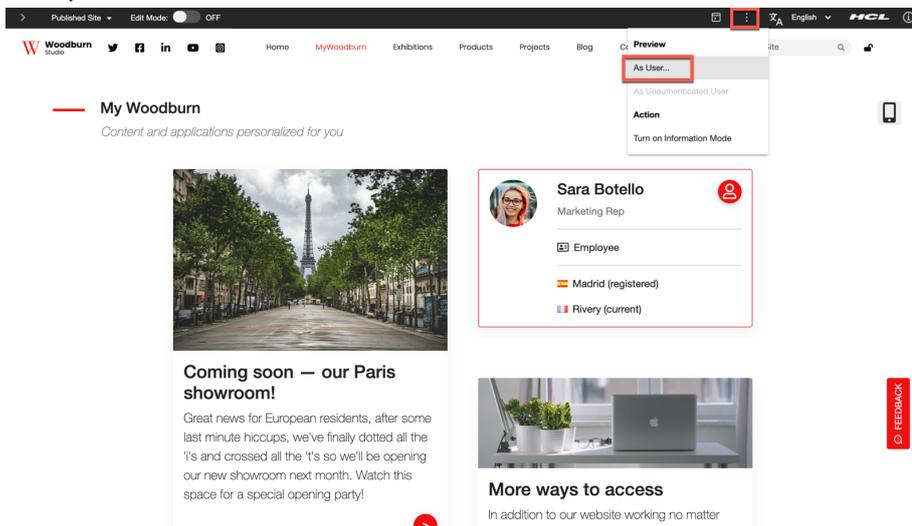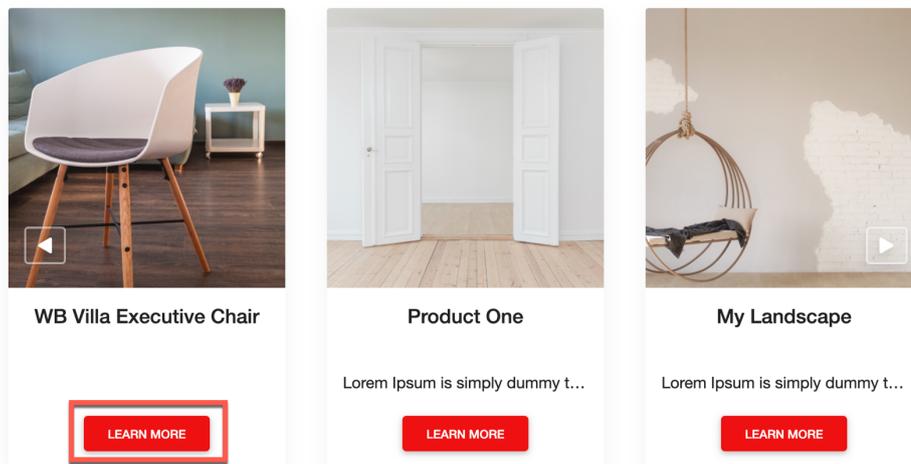

5. Then search for **dx**, as all the role users have been prefixed with dx, and then select the consumer one: **dxConsumer Impersonate**. Click **Impersonate**.
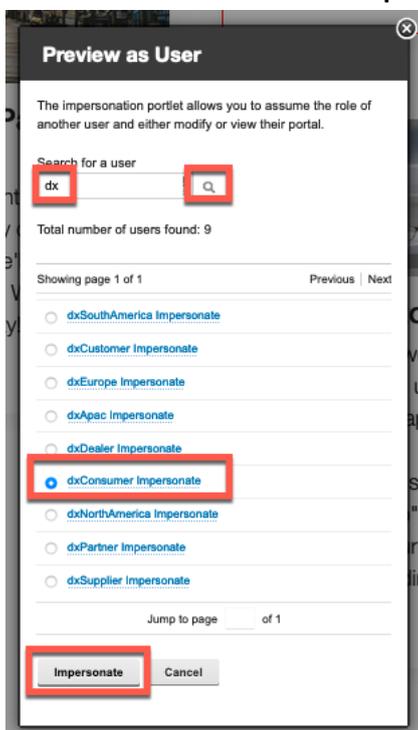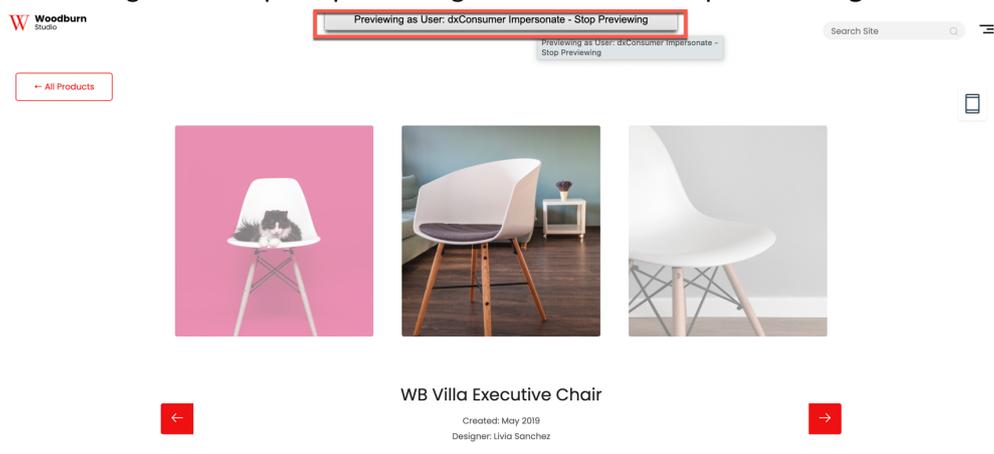
6. Now you see what a consumer sees on this page. On the bottom you see the list of products targeted to the consumer. Click on **LEARN MORE** of the chair that was reported to have a strange name.
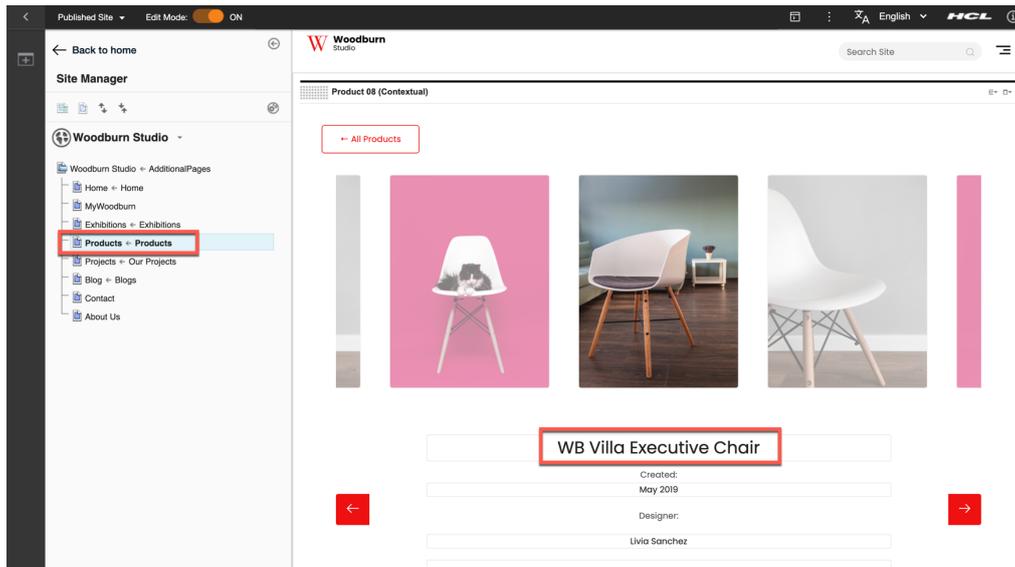

7. Let's change that. Stop the previewing first. Click on the top **Previewing as User** bar.

8. Now you see the site manager with your site pages. You first need to enable the **Edit Mode**.

9. Then you can enter the title field of the chair and other elements in the page in What You See Is What You Get (WYSIWYG) mode.

10. Make a correction in that title. Here you just change the title. E.g. if more people may use this lab on this server, you may add your initials at the end of the title. Notice that you can't change the font style, size, colour, etc. This has all been agreed with the IT team. Your change could be published immediately, as configured here, or go through a workflow process. If you want, you may disable the Edit Mode and see how this looks like.


You successfully reviewed the content of the consumer Mandy and updated the char title. This is how easy it is to author in HCL Digital Experience, with no need from IT.

Part 4: Business User Page Creation

Now you will need to promote a new sofa with a dedicated Stretching Out page**.** You will update it with relevant images and content. And you will add information of its designer, which should not be visible to employees, as everyone knows this already. And finally, you will test if this works correctly on all devices, like a mobile and table.

1. In the Site Manager, ensure you enabled the Edit Mode. Then select the page menu of MyWoodBurn and then **Create Sibling Page**. This will create a new page, just below (or in the navigation to the right of) and on the same level as your selected MyWoodBurn page.
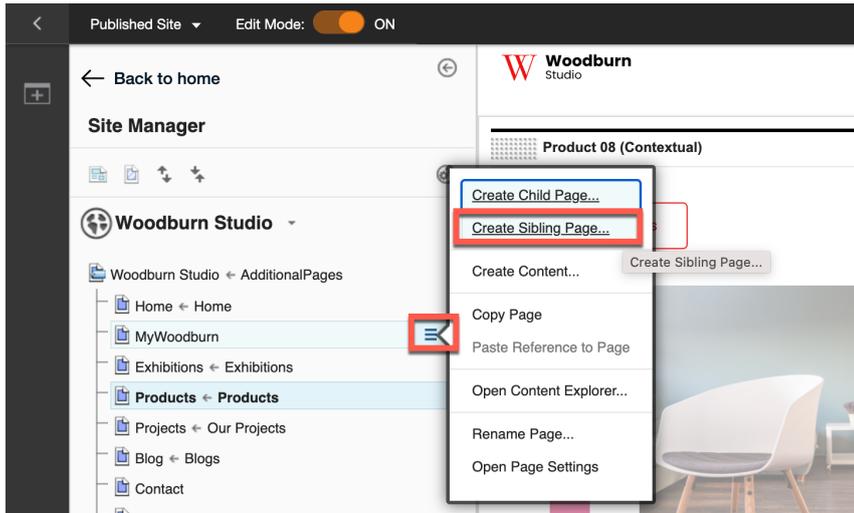
2. Enter your unique page title (so you can easily identify it if other people are following this lab on the same server, such as **Stretching Out<your initials, e.g. HH>**. Notice that the 'Friendly URL name' automatically populates. You may correct this and replace the space ' ' by a hyphen '-'. The Friendly URL is used to specify the URL for this page: http://<hostname:port number>/wps/myportal/woodburnstudio/**stretching-outHH**/. Then select the **Feature Story** page template and click **Create Page**:
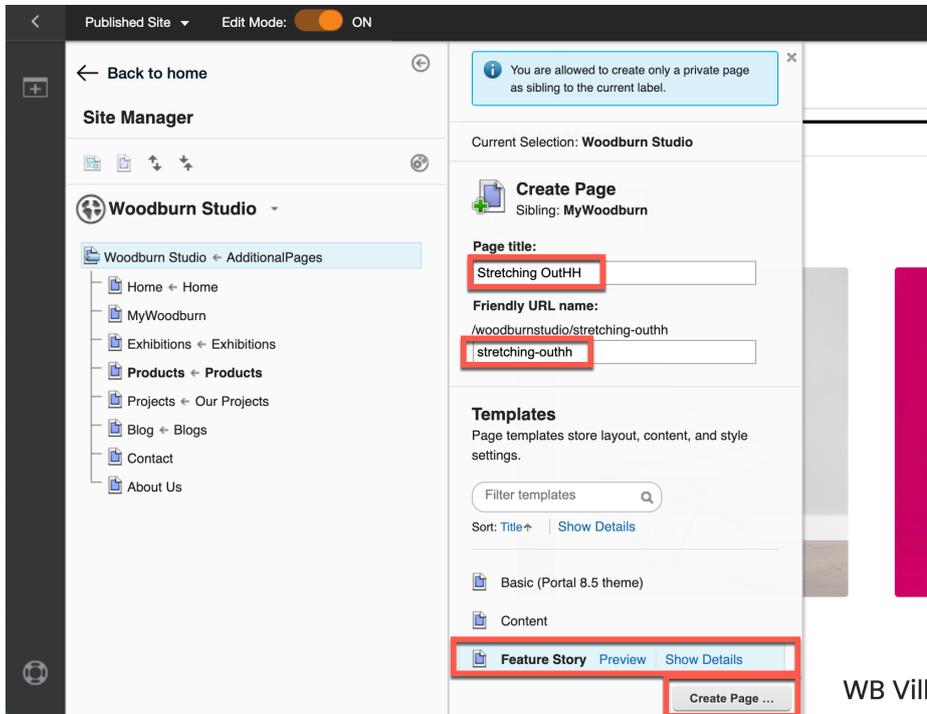

3. Your new page is created with a nice default configuration and is now ready for you to make your changes. Close the Site Manager to get more space for editing the page.
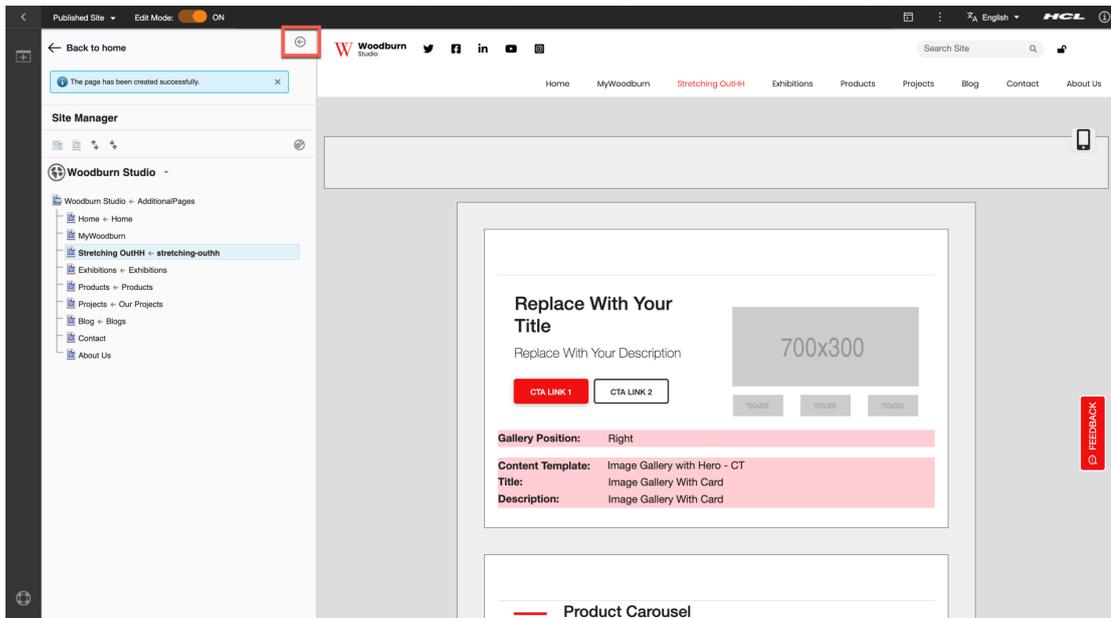
4. You will first update the top 'Image Gallery with Hero' page component. As you want to promote the sofa, you may update the title and description as follows:


5. Now you want to manage the Click to Action (CTA) links. The first one should point to the sofa in the products page and then second to the blogs. Hover over it and click **CTA Link** and then select **Web Content**. Then you can click **Browse** to select the page it should link to.
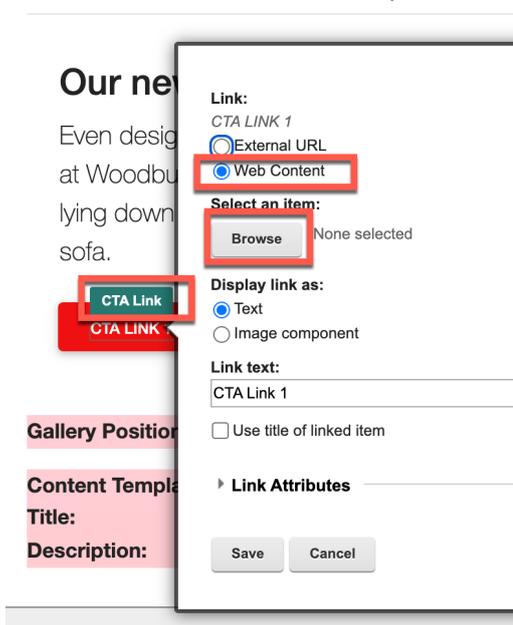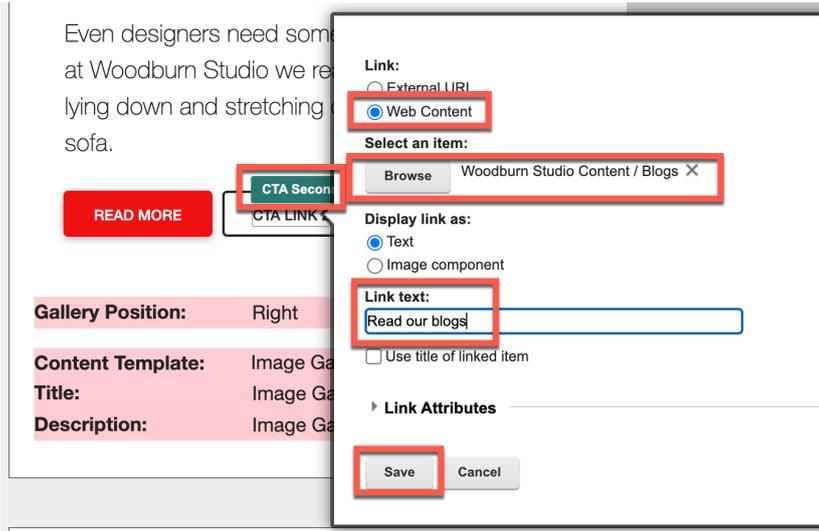
6. Select the **WoodBurn Studio Content** library (may be on the last page) with as **Content** - **Products** and then **OK**.
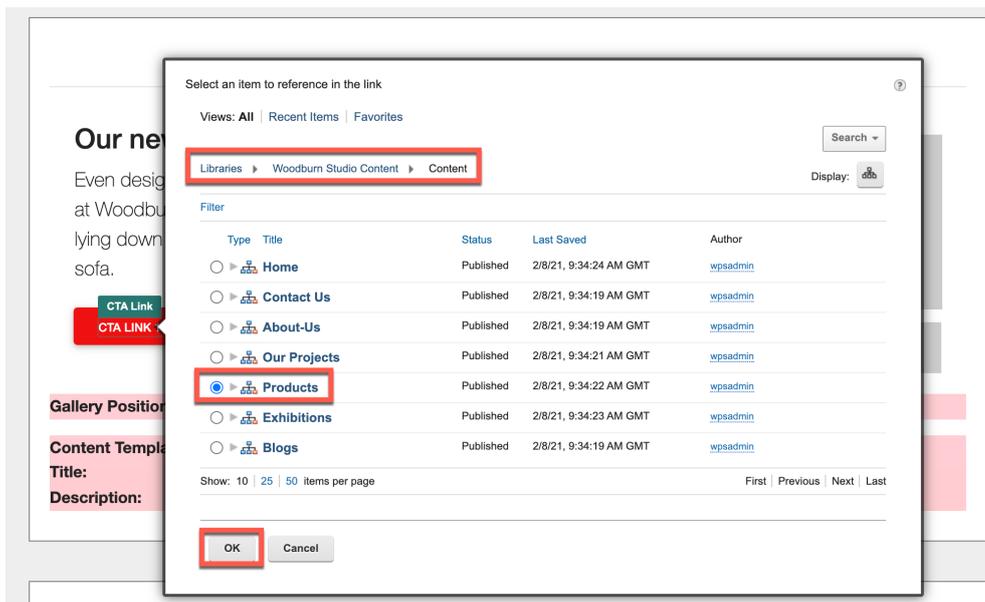

7. Then set the name of the link to **READ MORE** and click **Save**. Note that you have more Link Attributes options.
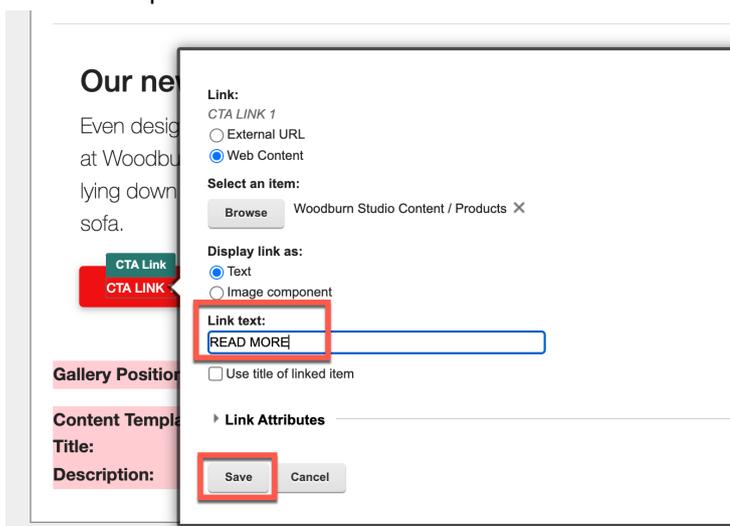
8. In a similar way, set the second link to the Blogs page as follows.

9. And now add some additional sofa images that you want to store in the Digital Assets Manager (DAM) for wider use in the organization. Start with Image1. Hover over it, click on **Image1** and change the 'Digital asset source' from 'Uploading using file browser' to '**HCL DAM**' and click **Select**.
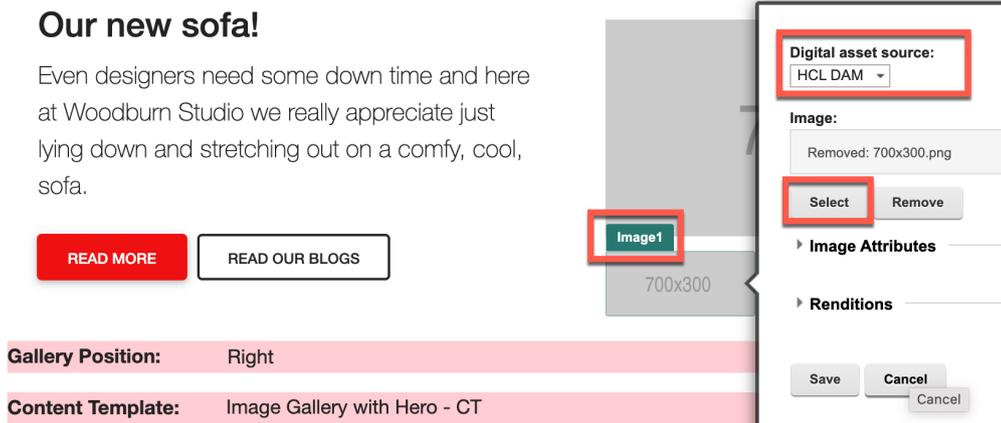
10. You may see some existing content here. Create your own identifiable collection to store your digital assets, so you can distinguish it easily from those of other people using the same server with this lab. Select **Create Collection**.
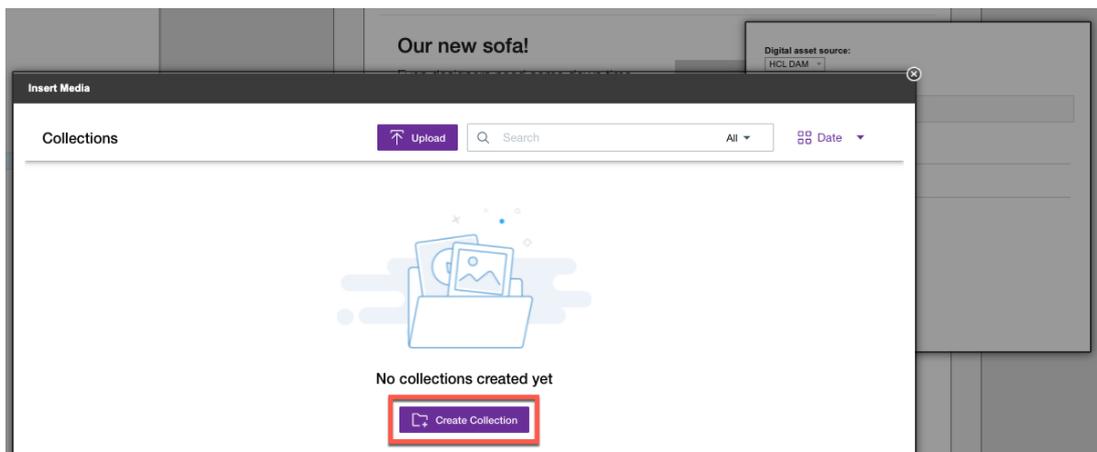

11. Give it a unique name, so you can easily find it more people are running this lab on your server, e.g. '**Stretching Out <your initials, e.g. HH>'** and then click **Create Collection**.
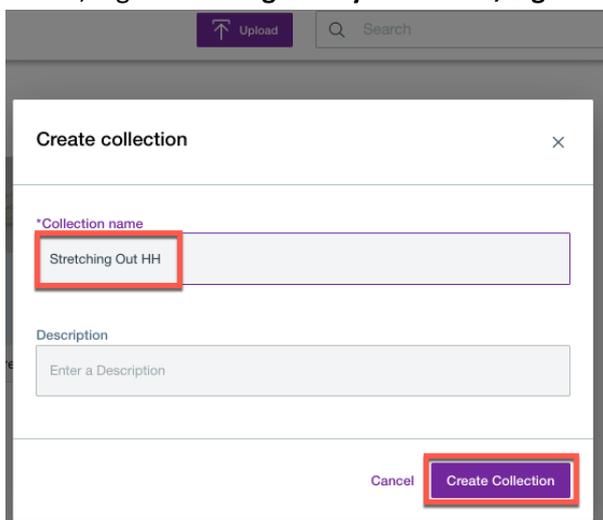
12. You may first set the access control to ensure that anonymous users may see all the assets you will store here. Click on **Access** and select '**Give anonymous access to media assets in this collection**'. Notice you can set additional administrators and users. Now click **Upload**.
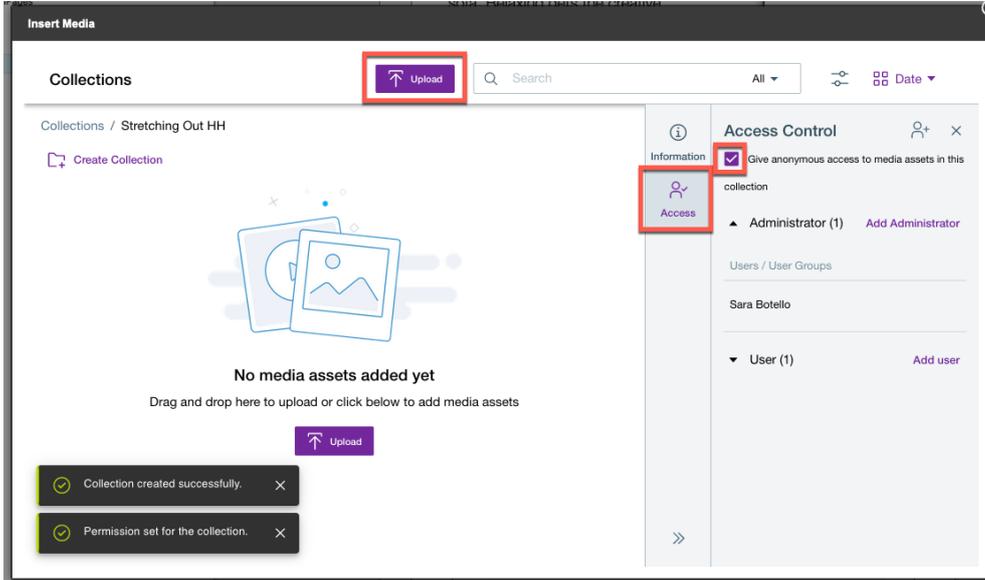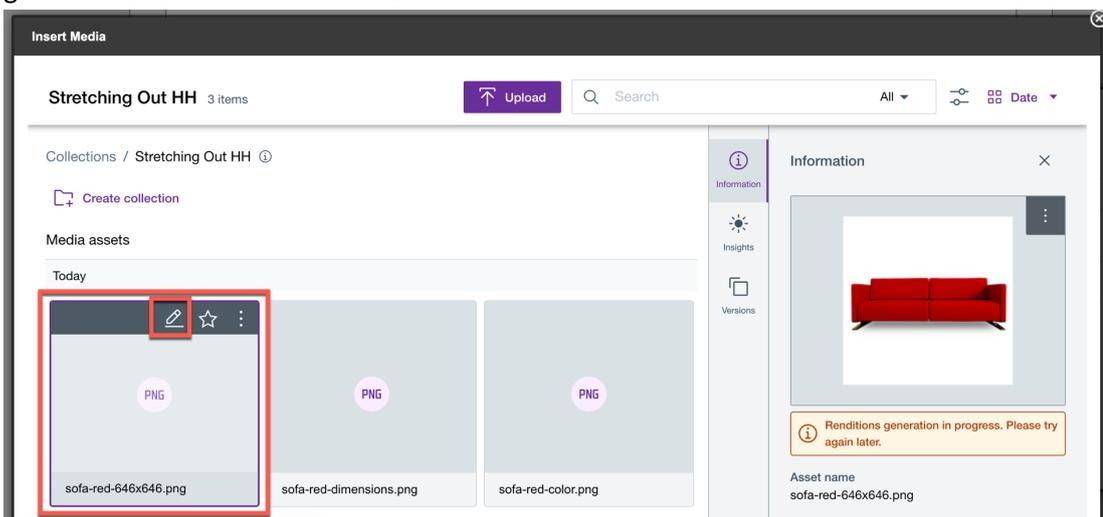

13. Choose the images that have been provided or add your own ones. You may also add other files, like videos, PDF and Word documents. Select them and click **Open**.
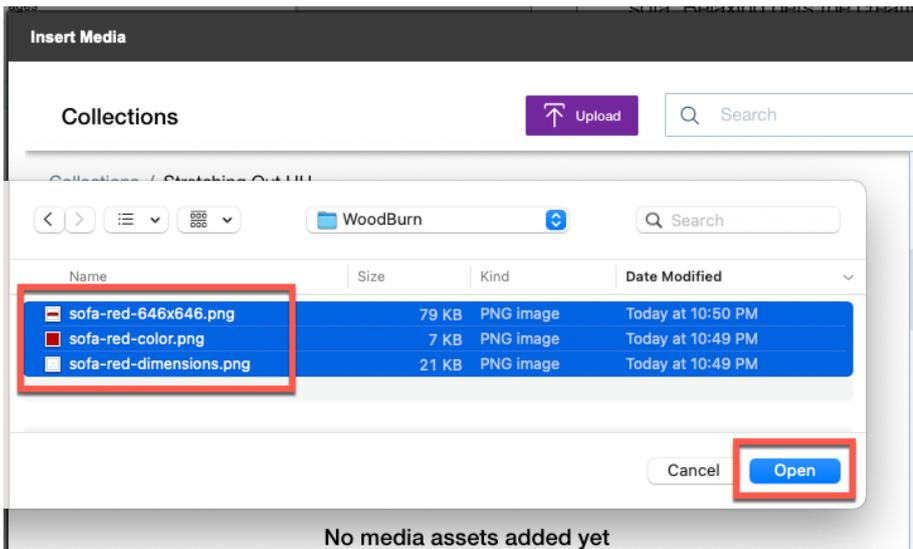
14. You can view and hide the upload details and then close it.
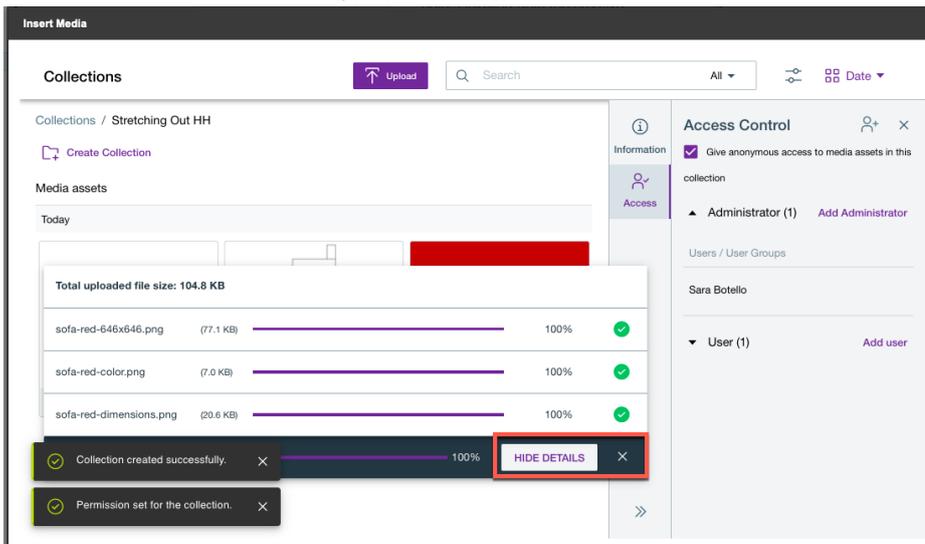
15. Select one of the images. You see the details on the right. Notice that renditions are being generated. Then click the **Edit icon**.

16. Notice that renditions are now automatically generated for the desktop, tablet and mobile. You may change them using the options on the top, like cropping, rotating and even replacing with a different image. You may also manage additional information. They look good, so let's now add them to your page. (If you wish to change them, feel free and don't forget to save your changes). If not changed, go back.
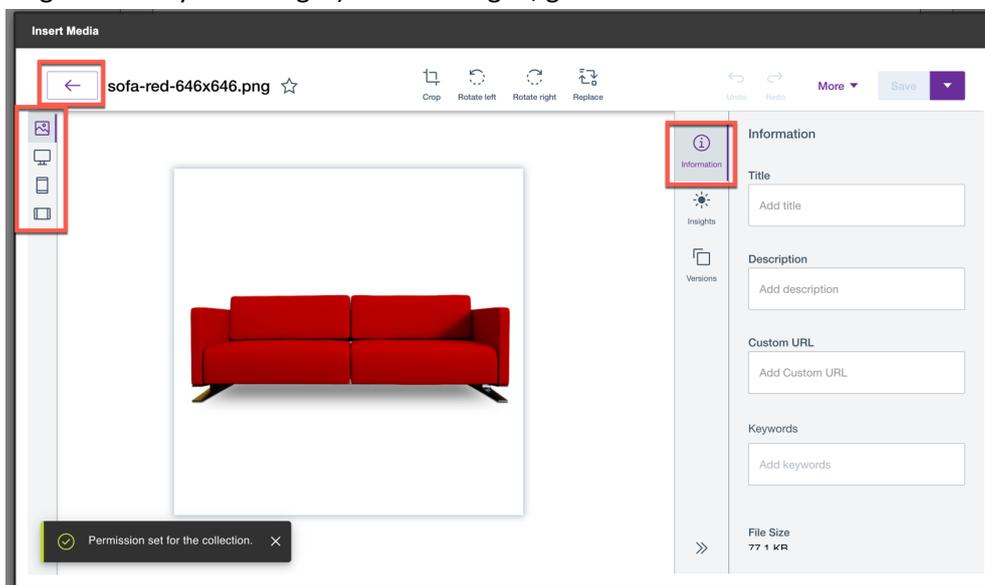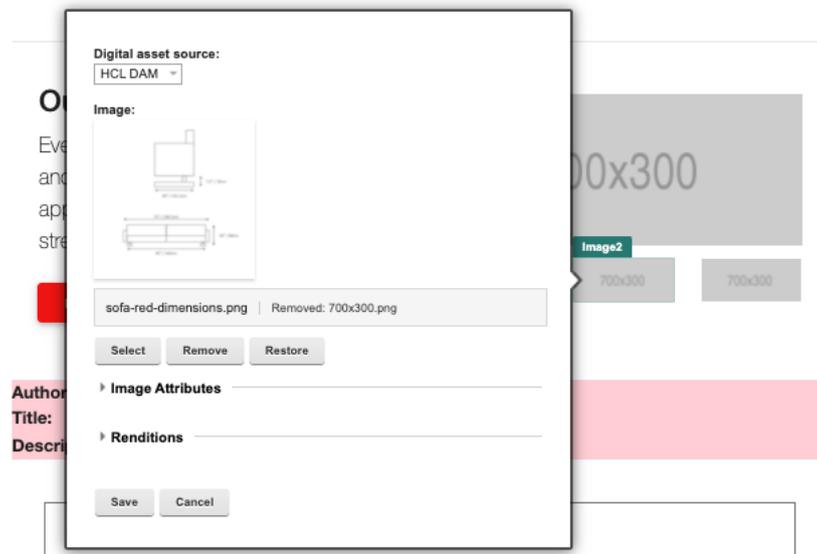

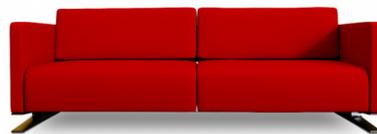17. Then select **Insert**.
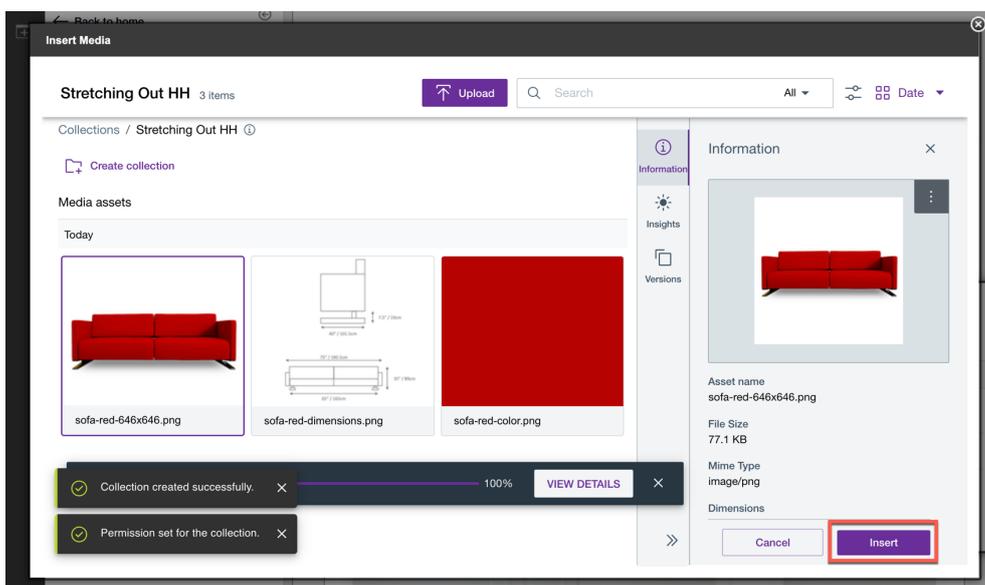
18. And then **Save**.
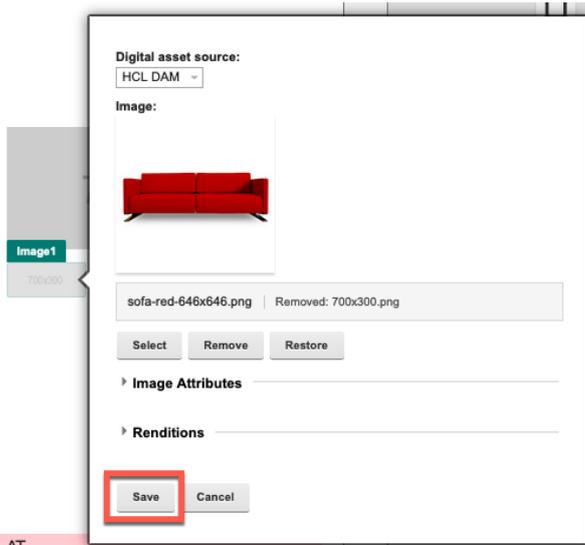
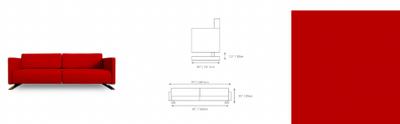19. Similarly, update '**Image2**' and '**Image3**'.

20. Then refresh the page and you should see.

Our new sofa!

Even designers need some down time and here at Woodburn Studio we really appreciate just lying down and strechting out on a comfy, cool, sofa.

READ MORE   READ OUR BLOGS

21. Now you should add the designer of this sofa to the page as well. This is a nice information for the consumers. The designer of this sofa is 'Amanda Smithsen'. Select the '**Add page components and applications'** icon, notice all page components you may add to the page, then open the '**Designer Cards'** and drag & drop '**Amanda Smithsen'** page component to the bottom of your page where a green placeholder appears.
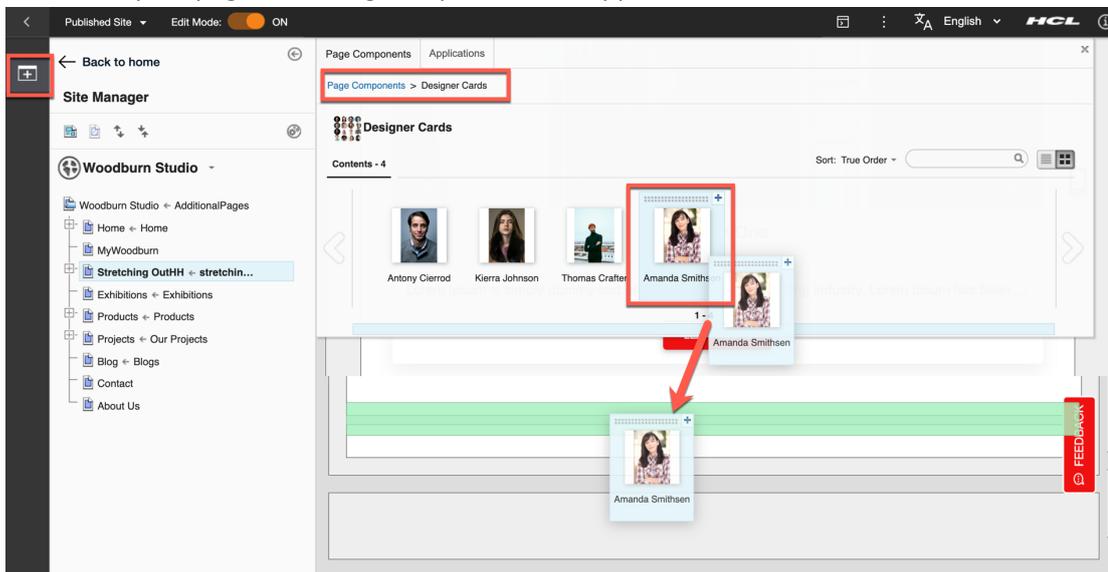
22. You see this component in your page that is ready for modification. You can leave its content as is, but as all employees already know who was the designer, you may hide this information for them. Open the **Display content menu** and click **Configure Spot**.
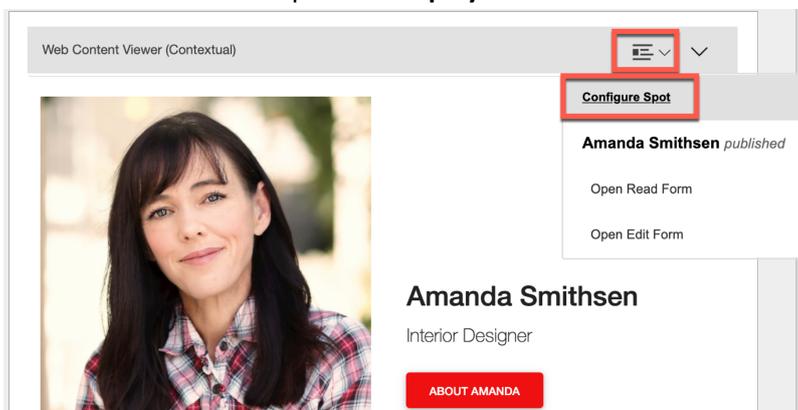
23. Change the **Configure Spot** configuration from 'Contextual Content' to **Targeted Content**. You see here you could add additional content and target each one to specific segments, e.g. for A/B testing. In this case, you just want to hide this spot for employees. Click **Hide Spot**.
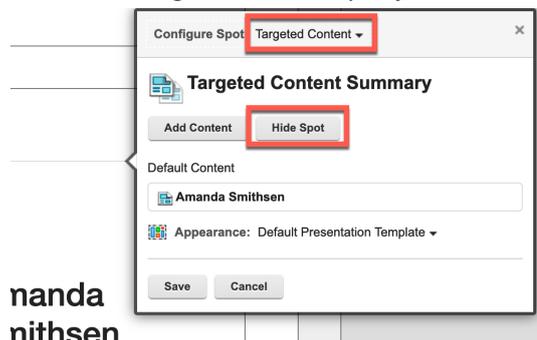
24. Then select the segment(s) you want to hide it from. Click **Add Segment…**
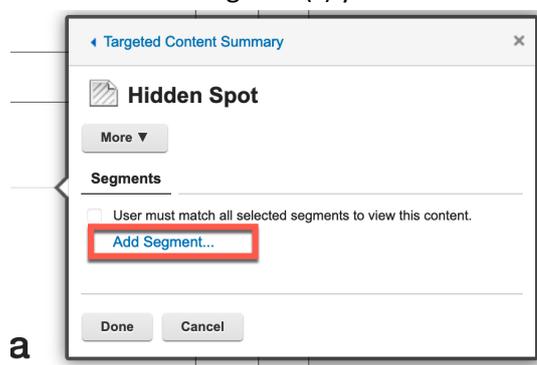
25. Here you can all the segments that have been used in the MyWoodBurn page to show the right information, based on device classes, profile and geo locations, roles, etc. Open the **User Role**, hover over the **EMPLOYEE** and select **Add** and then **Done**.
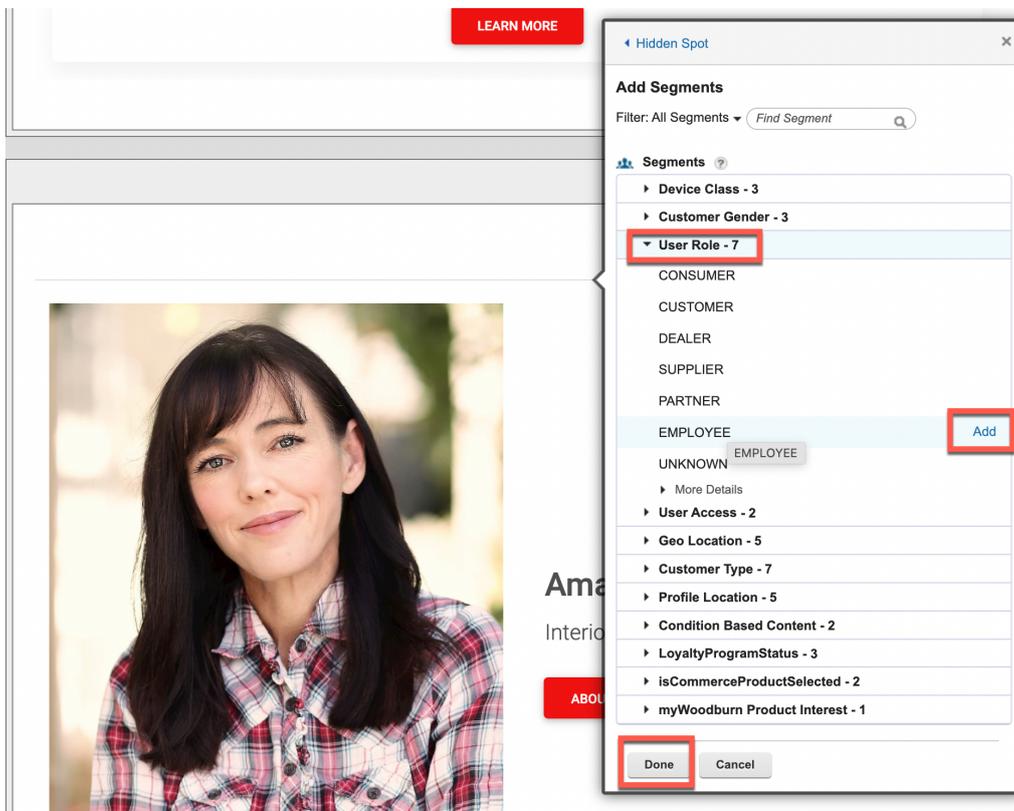
26. Then **Done** again.
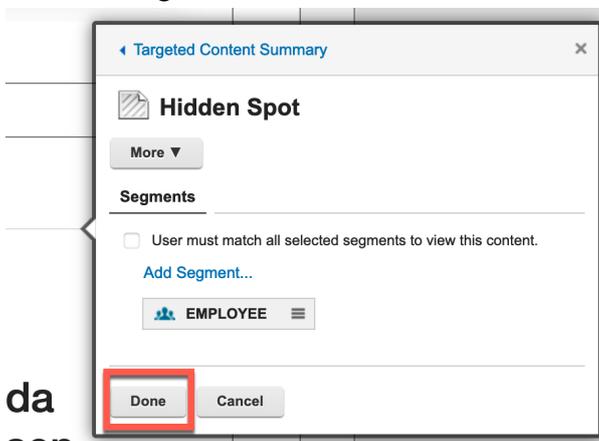
27. And finally **Save** it.
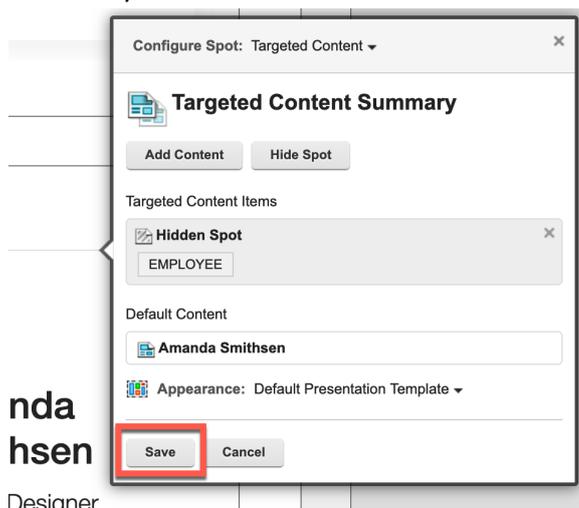
28. As you are an employee, this targeted spot is now hidden for you. However, you can still configure it and even show and edit again. Just hover over the content.
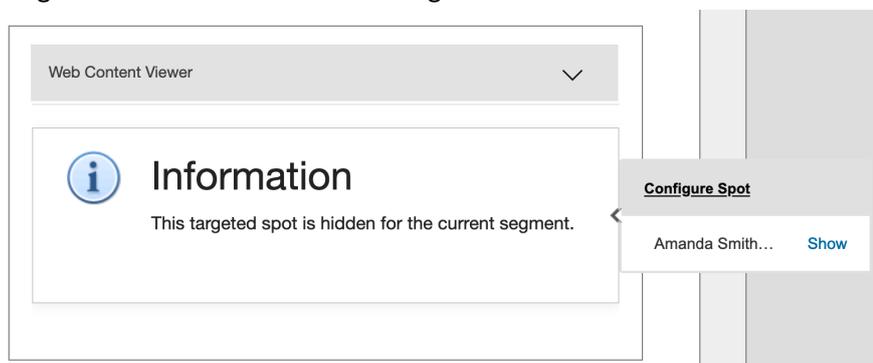
29. Let's check your page in the publish mode for anonymous users. Therefore, log out.

30. Your full page should look like, as you are no longer identified as an employee.
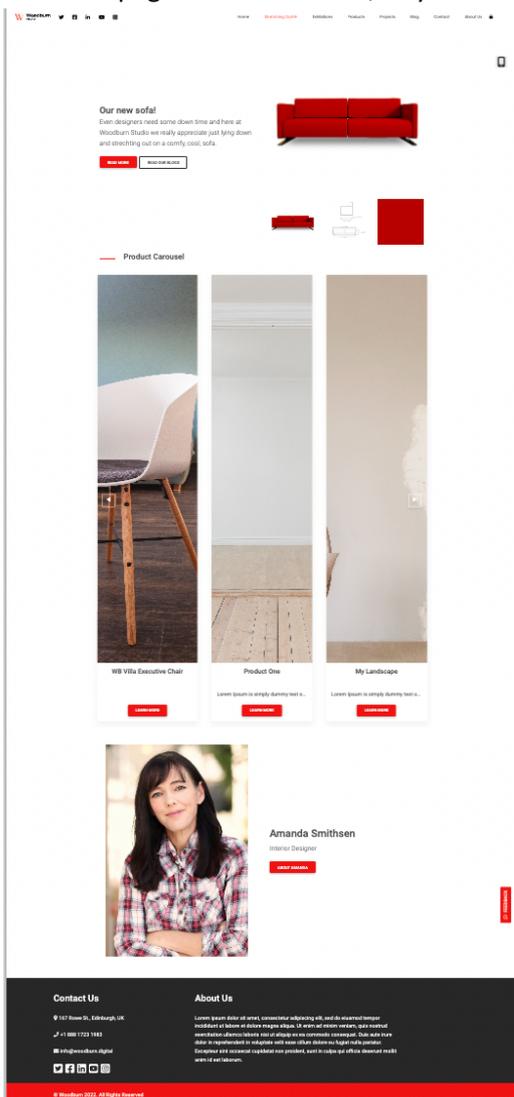
31. Finally, you will check how it will look like on other devices. Use the built-in Mobile Preview.
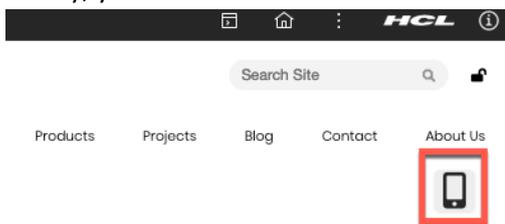
32. Ensure the checkbox **Enable Useragent Switching** is **enabled**. To enable it, install this on your Chrome browser: https://chrome.google.com/webstore/detail/mobile-browser-simulator/dcljefehlpjmoefgoohaobehbenocmkg. Then test it with the default smartphone iPhone and add another device, like a recent tablet.

Notice you can even get the QR code and then test it with your own devices as well.
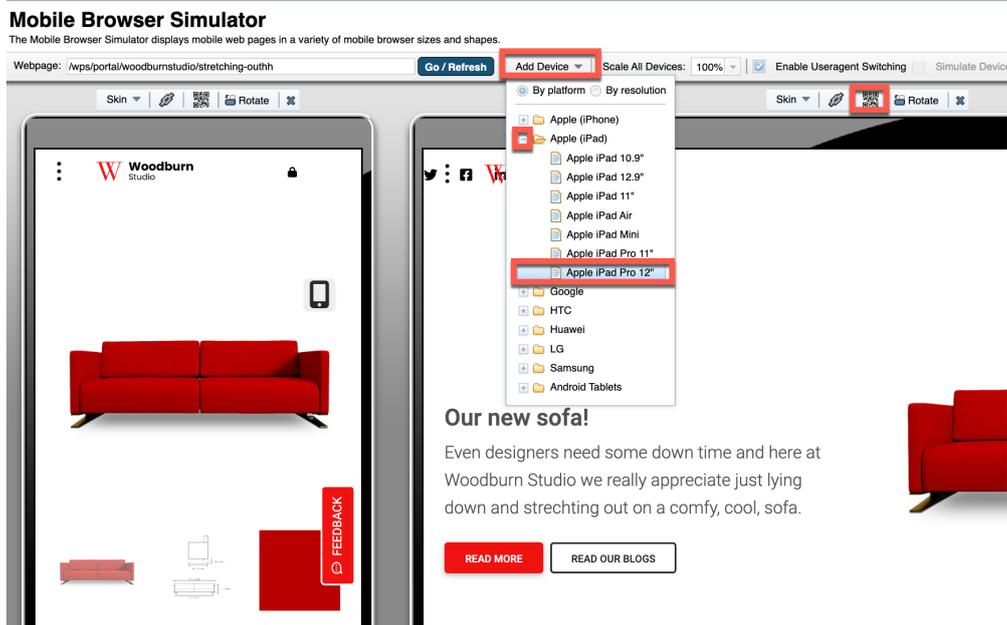
Congratulations!! You have created and configured a new page on the Woodburn Studio site and ensured it worked on all devices automatically!

Conclusion

Using this lab tutorial, you explored the Woodburn Studio site available as an anonymous and unauthenticated user. You then logged in as a consumer and saw how the site really tries to engage with you by learning from your interest, your profile, geolocation, etc. And finally, you have learned how easy it is as a Marketing Rep to make all kind of changes to the site without the need of IT and that work well on all different devices automatically.

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

Legal statements

This edition applies to version 9.5, release 219 of HCL Digital Experience and to all subsequent releases and modifications until otherwise indicated in new editions. It uses the DX Solution Modules Pack with additional resources in HCL SoFy.

When you send information to HCL Technologies Ltd., you grant HCL Technologies Ltd. a nonexclusive right to use or distribute the information in any way it believes appropriate without incurring any obligation to you.

Disclaimers

This report is subject to the HCL Terms of Use (https://www.hcl.com/terms-of-use) and the following disclaimers:

The information contained in this report is provided for informational purposes only. While efforts were made to verify the completeness and accuracy of the information contained in this publication, it is provided AS IS without warranty of any kind, express or implied, including but not limited to the implied warranties of merchantability, non-infringement, and fitness for a particular purpose. In addition, this information is based on HCL's current product plans and strategy, which are subject to change by HCL without notice. HCL shall not be responsible for any direct, indirect, incidental, consequential, special or other damages arising out of the use of, or otherwise related to, this report or any other materials. Nothing contained in this publication is intended to, nor shall have the effect of, creating any warranties or representations from HCL or its suppliers or licensors, or altering the terms and conditions of the applicable license agreement governing the use of HCL software.

References in this report to HCL products, programs, or services do not imply that they will be available in all countries in which HCL operates. Product release dates and/or capabilities referenced in this presentation may change at any time at HCL's sole discretion based on market opportunities or other factors, and are not intended to be a commitment to future product or feature availability in any way. The underlying database used to support these reports is refreshed on a weekly basis. Discrepancies found between reports generated using this web tool and other HCL documentation sources may or may not be attributed to different publish and refresh cycles for this tool and other sources. Nothing contained in this report is intended to, nor shall have the effect of, stating.

or implying that any activities undertaken by you will result in any specific sales, revenue growth, savings or other results. You assume sole responsibility for any results you obtain or decisions you make as a result of this report. Notwithstanding the HCL Terms of Use (https://www.hcl.com/terms-of-use), users of this site are permitted to copy and save the reports generated from this tool for such users own internal business purpose. No other use shall be permitted.