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**ATG WEB COMMERCE**

Version 10.0.2

Business Control Center User's Guide

Oracle ATG  
One Main Street  
Cambridge, MA 02142  
USA

## **ATG Business Control Center User's Guide**

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# 1 Introduction

The ATG Business Control Center is a browser-based interface that you use to create and edit many of the elements required to set up and maintain ATG-based Web sites. The activities you can perform in the ATG Business Control Center are divided into two general areas:

- ATG Content Administration activities. The ATG Business Control Center is the primary interface for performing ATG Content Administration tasks, including the creation and deployment of Web site content.
- ATG Personalization activities. You use the ATG Business Control Center to create and manage the components that are responsible for delivering personalized Web site content (content that changes dynamically for each site visitor). These components include user profiles, organizations, roles, user segments, content targeters, and content groups.

The ATG Business Control Center is also used as the starting point for launching several ATG applications, including the following:

- ATG Merchandising
- Search Administration
- The Site Administration utility
- ATG Outreach
- ATG Campaign Optimizer
- ATG Service applications

**Note:** Scenarios, slots, and workflows are not managed through the ATG Business Control Center. To create and edit these items, use the ATG Control Center. See the [ATG Personalization Guide for Business Users](#) for more information.

## About This Manual

This manual has two goals:

- To introduce the ATG Business Control Center interface and describe how to perform tasks that are common to any application that uses this interface. These tasks include navigating the UI, performing batch edits, and using elements such as the Search tab.



- To describe how to use the ATG Business Control Center to create and manage user segments, content targeters, and content groups, which are the ATG Personalization features you use to set up a Web site that displays dynamic content.

The following topics are covered elsewhere in the ATG documentation set:

Topic	Refer to...
Managing user profiles, organizations, and roles	<a href="#">ATG Business Control Center Administration and Development Guide</a>
Completing ATG Content Administration tasks—for example, creating projects and managing the deployment of Web site assets	<a href="#">ATG Content Administration Guide for Business Users</a>
Using the ATG Business Control Center to perform ATG application-specific activities	The documentation set for each ATG application

## Installing and Starting the ATG Business Control Center

The ATG Business Control Center is installed automatically as part of the ATG platform if your installation also includes ATG Content Administration. For information, refer to the [ATG Installation and Configuration Guide](#).

### Configuring the Database

A SOLID demo database is provided for evaluation purposes. If you are using this database, you do not need to perform any database configuration in order to use the ATG Business Control Center. However, if you are using a database other than SOLID, you must perform several configuration steps to set up your database for use with ATG products.

The steps are described in *Configuring the ATG Content Administration Database* in the [ATG Content Administration Programming Guide](#). Note in particular that you must run the `importDPSUI` script to import view mapping data used for the Personalization interface.

### Login Requirements

To log into the ATG Business Control Center and access specific areas within it, you need the following user configuration:

- An internal user profile, defined in the Internal Users interface of the ATG Business Control Center. When you log into the application (see below), you are prompted to enter a user name and password. The values to enter are the login name and password



specified in your user profile. A default profile is provided – see [Starting the ATG Business Control Center](#).

- An ATG Portal role, for example 100001-member. This role is required for access to the ATG Business Control Center framework. ATG Portal roles are assigned through the Internal Users interface. In this case, the appropriate roles are located by default in the Global Roles > Root Folder > Bizui directory. If you have only this role, you have access to the Users options in the ATG Business Control Center, but to none of the other options (see [BCC Home Page](#)).
- An ATG Content Administration role, for example EPub-User or EPub-Manager. These are also added to your user profile through the Internal Users interface in the ATG Business Control Center. Although you do not need one of these roles to start the ATG Business Control Center, you do need one to access all ATG Content Administration features, which include projects. Because the targeting features you work with in the ATG Business Control Center use projects, you need this role to be able to work with them. If you do not have this role, the Targeting and Segmentation option on the Home page does not appear.
- Some ATG applications use ATG Customer Intelligence to provide a set of reports. For example, ATG Outreach includes reports that business managers can use to view data about e-mail campaigns. If you want to view any reports, you need one of the reporting roles that allows access to the Report Center, for example Report Viewer or Reporting Administrator. These roles are located in the Global Roles > Root Folder directory.
- A Web browser. The ATG Business Control Center supports various browsers and operating systems. For up-to-date information, see the Supported Environments page on atg.com: <http://www.atg.com/en/products-services/commerce/supported-environments/>

If you use Internet Explorer 8 for viewing the ATG Business Control Center, note that you must enable the Tools > Compatibility View option in the browser to ensure correct behavior. For more information, refer to *Internet Explorer 8 and ATG Applications* in the [ATG Multiple Application Integration Guide](#).

## Starting the ATG Business Control Center

To start the ATG Business Control Center:

1. Make sure the appropriate database is running. If you are evaluating ATG products on a local machine running Windows, you can start the SOLID database installed with ATG 10.0.2 by selecting Start > Programs > ATG 10.0.2 > ATG Content Administration > Start SOLID Server.
2. Start the ATG products that you want to use with the ATG Business Control Center. For example, start ATG Content Administration or an ATG application such as ATG Merchandising. In all cases the ATG Business Control Center will be started automatically as part of this process. For detailed information, refer to the documentation for the appropriate ATG product.

For evaluation purposes on a local Windows machine, you can start ATG Content Administration as follows: select Start > Programs > ATG 10.0.2 > ATG Content Administration > Start ATG 10.0.2.



3. Point your Web browser to the server where the ATG Business Control Center is running. The URL takes the following form:

`http://hostname:port/atg/bcc`

where *hostname* is the name of the server, and *port* is the number of the port which that server uses for the ATG Business Control Center.

`http://anycorp.androcles:8080/atg/bcc`

If you are running the ATG Business Control Center on a local machine, enter the following URL:

`http://localhost:port/atg/bcc`

The default port numbers for JBoss, IBM WebSphere, and Oracle WebLogic are 8080, 9080, and 7001, respectively. See the [ATG Installation and Configuration Guide](#) for details.

4. When the ATG Business Control Center login dialog box appears, enter the login name and password defined in your ATG user profile. The fields are case sensitive. For evaluation purposes, or to set up profiles for other users, use the following login name and password:

admin  
admin

#### **Note for Internet Explorer 8 Users**

If you use Internet Explorer 8 for viewing the ATG Business Control Center, enable the Tools > Compatibility View option in the browser. For more information, refer to *Internet Explorer 8 and ATG Applications* in the [ATG Multiple Application Integration Guide](#).

## ACC Support

The Web-based ATG Business Control Center is intended to supersede the ACC interface used in earlier versions of the ATG platform. The ACC remains available in ATG 10.0.2. You can use it to edit the ATG Personalization components that are described in this guide, with the following constraints:

- Content targeters and content groups that you created in the ACC can be opened and edited in the ATG Business Control Center. However, once you edit these items in the ATG Business Control Center, you cannot subsequently edit them in the ACC.
- Content targeters and content groups can be configured to support a multisite environment (one in which a single instance of ATG products is used to run more than one Web site). However, the multisite features for these items are not available in the ACC. To support multiple sites, manage these items through the ATG Business Control Center.





- User profiles, organizations, and roles can be created and edited in either the ATG Business Control Center or the ACC. The ATG Business Control Center is the recommended interface.
- The ATG Business Control Center requires ATG Content Administration. If your ATG product suite does not include ATG Content Administration, you must continue to use the ACC to create and edit the components described in this guide. See the [ATG Personalization Guide for Business Users](#).
- Slots, scenarios, and workflows must be created and edited in the ACC.



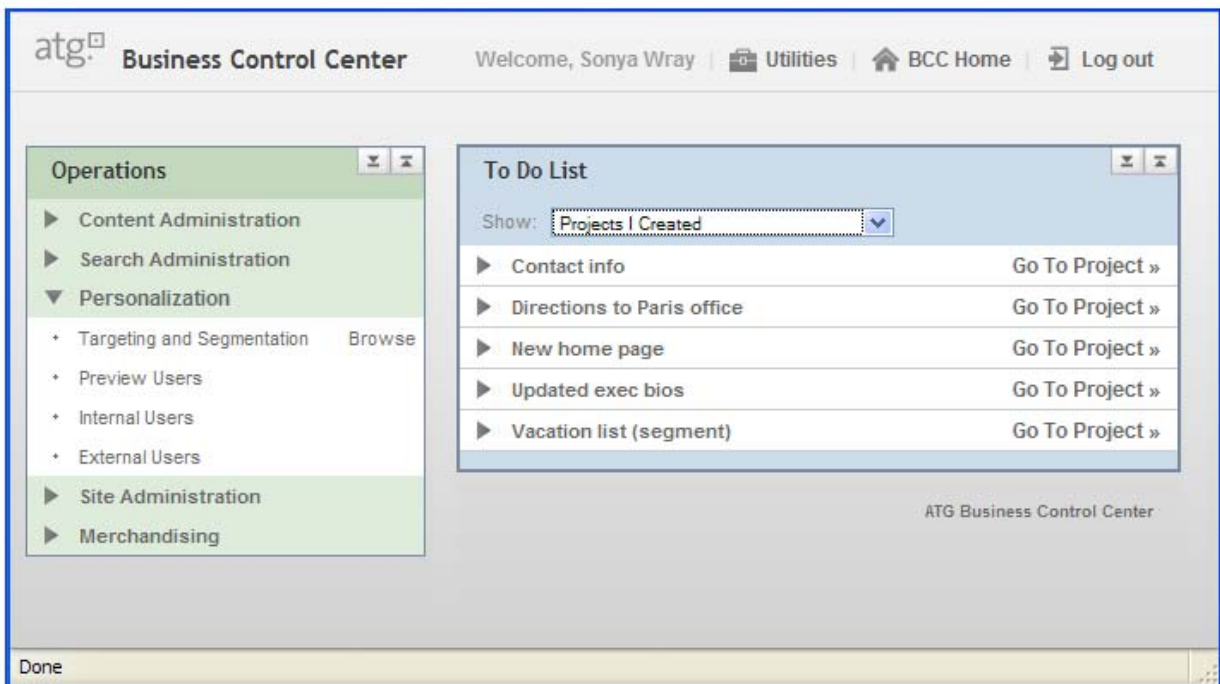


## 2 ATG Business Control Center User Interface

This chapter introduces the ATG Business Control Center user interface. It describes basic navigation and shows how to work with elements of the UI that are common to any application that uses the ATG Business Control Center framework.

### BCC Home Page

After you log in to the ATG Business Control Center, the BCC Home page appears, as shown in the following image:



The elements that make up the BCC Home page are described below.



- The **Welcome** bar at the top shows the name of the logged-in user (the values of the first name and last name properties in the user profile).
- The **Utilities** menu contains a link to the ATG product documentation. If your installation includes ATG Customer Intelligence, the menu also contains a link to the Reporting Center.
- The **BCC Home** link returns you to this page from other parts of the ATG Business Control Center.
- The **Log Out** link ends your ATG Business Control Center session.
- The **To Do List** shows the ATG Content Administration projects that have been created in your system. For comprehensive information on using projects, refer to the [ATG Content Administration Guide for Business Users](#).
- The **Operations** list contains the options you use to enter the editing interfaces for the ATG applications available to you. The options vary according to the following:
  - The options that your role has permission to use.
  - The ATG modules and applications that are running on the server.

## Project Basics

Many of the items you create within the ATG Business Control Center, such as segments, targeters, and content groups, as well as assets such as product images, price lists, and SKUs from applications like ATG Merchandising, must be published to your live sites along with any other items necessary for running the sites. These necessary items include individual pieces of content, images, style sheets, and the Web pages themselves. The process of publishing assets from a development environment to a live site is managed by ATG Content Administration. The following are some key ATG Content Administration terms that you need to be familiar with when you create and edit items in the ATG Business Control Center:

- **Project:** ATG Content Administration controls the lifecycle of items that are published to your Web sites through an entity called a project. A project contains a set of **tasks** that define the stages of the creation and publishing lifecycle. Typically, tasks include authoring, approval, and deployment. Tasks can be completed by different users. For example, the approval task could be completed by a supervisor, and the deployment task could be performed by a Web site administrator.

Often, a project represents a logical grouping of items related to a particular business goal. For example, you could have a project called "New home page" that contains all the items you need to create a home page on a site. Another example might be a project called "Executive bios" that you use to deploy updated versions of executive biographies to your corporate information pages. Any number of items can be managed and deployed by a single project.

- **Asset:** In ATG Content Administration, any item that you create, edit, and deploy is referred to as an asset. Different ATG applications have their own types of assets. For example, ATG Merchandising assets include products, SKUs, and price lists. ATG Personalization assets include user segments, targeters, and content groups. In several



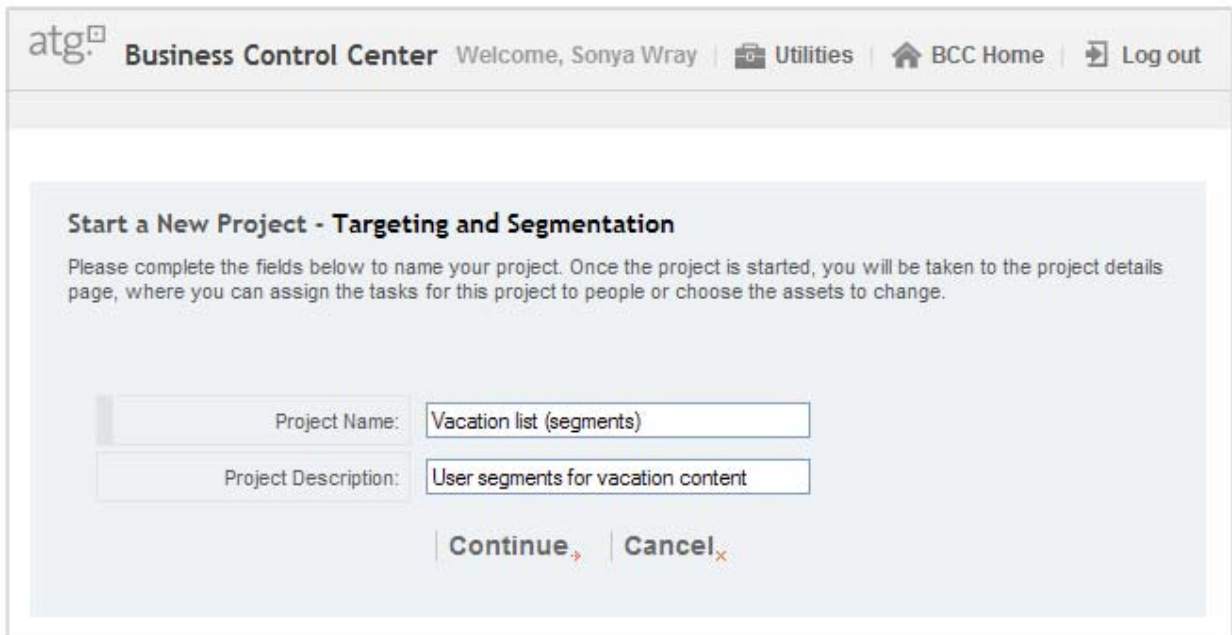
places in the ATG Business Control Center interface, “asset” is used as a generic term for these items.

- **Versioning:** As well as managing the creation and deployment of assets, ATG Content Administration performs a type of source control, called versioning, on each asset. When you create an asset, the system gives it the number 1. When you or another user edits the asset, a second version is created, and versions 1 and 2 are both stored in the system. This behavior has two purposes: it prevents conflicts when two or more people edit the same asset, and it allows you to recover from errors by reverting to a previous version of an asset at any time.

For detailed information on any of these terms, or for more information about versioning and deployment, refer to the [ATG Content Administration Guide for Business Users](#) and the [ATG Content Administration Programming Guide](#).

### Creating a Project

As described for targeting assets in later chapters of this guide, the first step when you create an asset is to specify the project that will manage the creation, versioning, and deployment of the item. The following image shows the fields you use to create a project. This dialog box appears after you select the Targeting and Segmentation option on the BCC Home page.



To complete this screen, follow the steps below:

1. Enter a name and description for the project. The name is used to identify the project in various places in the UI, for example in the To Do list on the Home page. Making this name distinctive is recommended so that you and other users can distinguish it from



other projects in your system. Project names do not have to be unique, however. The description is optional but can be helpful where many projects have similar names.

2. Click Continue when you have finished.

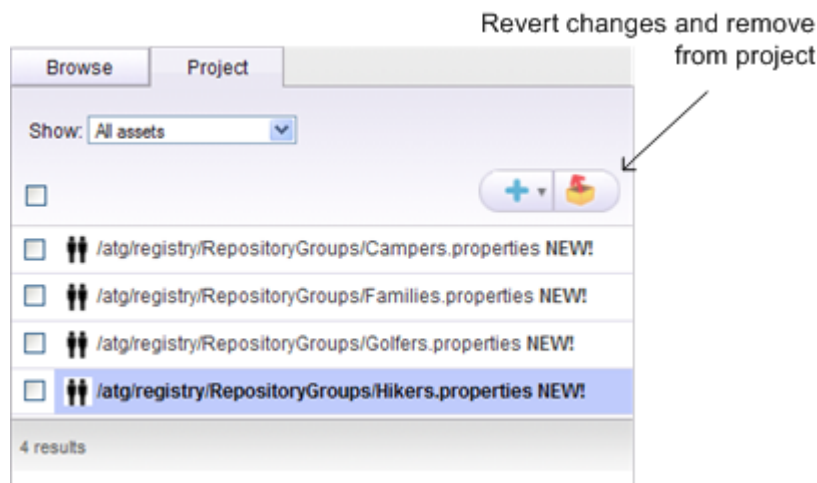
At this point, the project's Author task becomes active, and you can start creating assets. For targeting items, the creation process is described in detail in later chapters of this guide:

- [User Segments](#)
- [Content Groups](#)
- [Content Targeters](#)

For other types of assets, refer to the documentation for the ATG application that manages them. For more detail on projects, refer to the [ATG Content Administration Guide for Business Users](#).

### Adding Assets to a Project

Most assets that you create or edit in the ATG Business Control Center must be added to a project so that they can be versioned and deployed. To see the assets that have been added to the current project, display the Project tab, as shown below:



When you create an asset, for example a user segment, the asset is automatically added to the current project, and the label "NEW!" appears next to the asset in the Project tab. The new asset also appears in the Browse tab for this project. The asset will be published to the live Web site when the project is deployed. The asset is also added to the versioning system.

### Adding or Changing Existing Assets

You can also add an existing asset to a project. To do so, locate the asset in the Browse tab, check the box to select it, and then click the Add to Project icon. The asset appears in the Project tab and will be published to the live site when the project is deployed.



You can make changes to an existing asset if necessary. To do so, highlight the asset in the Browse tab so that its details appear in the General and Rules tabs on the right. Make any changes you need, and click Save. The asset is automatically added to the project, and a new version of the asset will be added to the versioning system when the project is deployed.

**Note:** When you create an asset as part of a project, the asset will not appear in the Browse tab for other projects until the asset is checked in to the versioning system. Check-in typically occurs when the project is deployed (the Deploy task is completed). For more information, see the [ATG Content Administration Guide for Business Users](#).

## Removing Assets from a Project

To remove an asset from a project, display the Project tab, select the asset to remove, and click the Revert Changes and Remove from Project icon shown in the previous image. To select all assets for removal, click the checkbox in the icon bar.

When you remove an asset marked as new, the asset is simply deleted from the system. When you remove an asset that you changed as part of this project, the changes are discarded and the asset is removed from the project. The previous versions of the asset still exist in the system.

For more information on how to delete existing assets from the system, refer to the [ATG Content Administration Guide for Business Users](#).

## Completing the Creation Process and Deploying the Assets

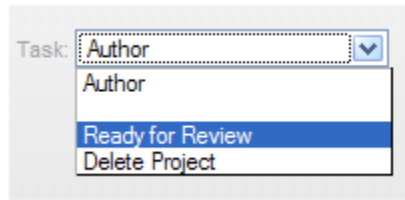
When you have finished creating the assets for a project, you must indicate that the Author task is complete so the next stage, usually a Content Review task, can start. Deployment is the last task in any project; the assets can be deployed to the live site only when all other tasks have been completed.

The default project used for targeting items contains the following tasks:

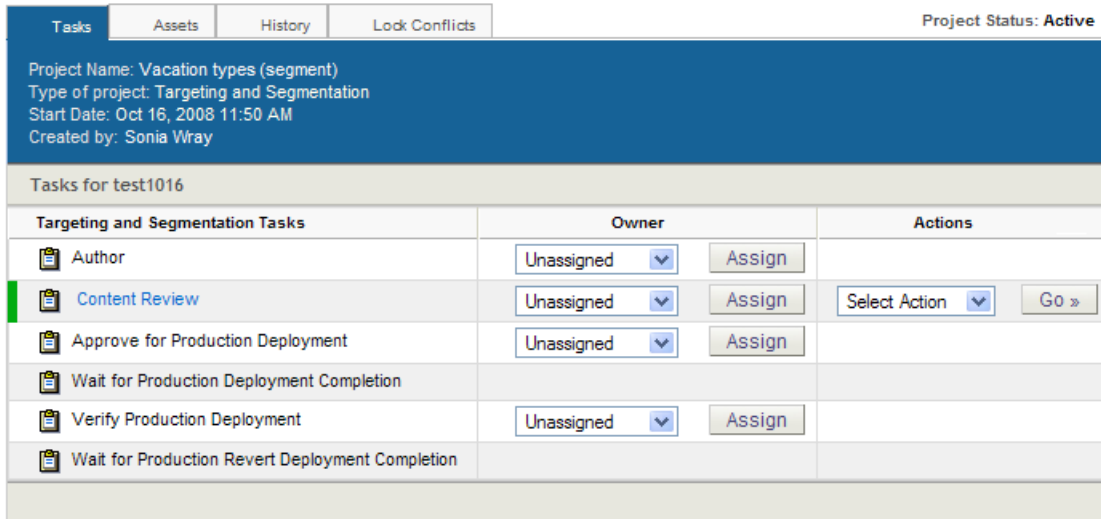
- Author
- Content Review
- Approve for Production Deployment
- Wait for Production Deployment Completion
- Verify Production Deployment
- Wait for Production Revert Deployment Completion

**Note:** If your ATG environment uses a staging site as well as a production site, the display includes a similar set of tasks for deploying to staging. For more information, refer to the [ATG Content Administration Programming Guide](#).

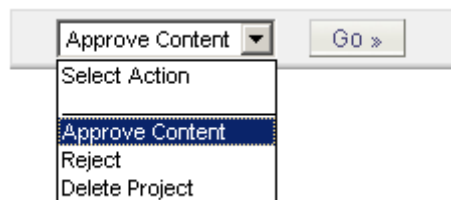
To indicate that the Author task is complete, select Ready for Review from the Task menu, as shown.



The Content Review task is now active. At this point, you move out of the targeting interface and into the project interface, which is part of ATG Content Administration:



When the assets in the project have been reviewed by you or another user, indicate that the Content Review task is complete by selecting Approve Content from the Select Action menu, as shown below. Then click Go.



When the Approve Content task is complete, the Actions field appears for the next task, the Approve for Production Deployment task.

The deployment tasks are described in detail in the [ATG Content Administration Programming Guide](#). The basic steps you perform to complete them are summarized below:





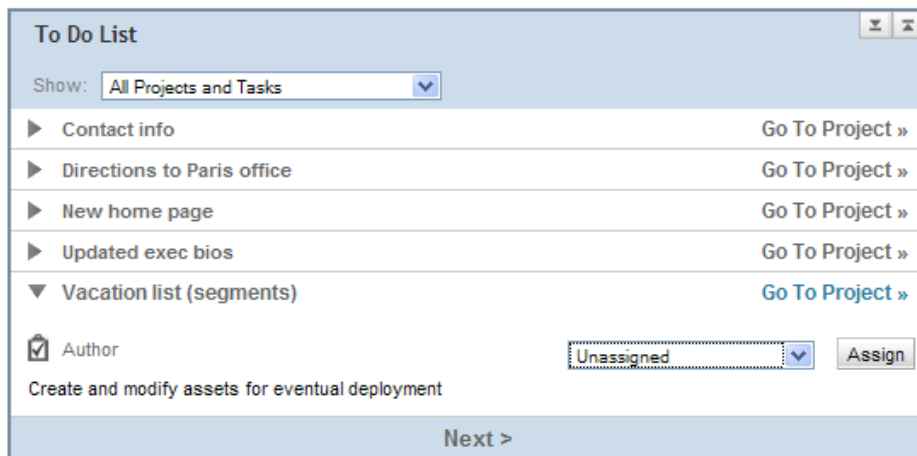
1. Select Approve and Deploy to Production to complete the Approve for Production Deployment task.
2. Monitor the display until the Verify Production Deployment task becomes active (the Actions field appears). You may need to refresh the page to see these fields.
3. When the deployment has finished, the Verify Production Deployment task becomes active; select Accept Production Deployment from the Actions list and click Go.

### Opening an Existing Project

You do not have to complete the Author task in one session. As long as the Author task has not yet been marked as complete, you can return to the project at any time and add or create assets.

To locate and open an existing project:

1. Display the BCC Home page.
2. In the To Do list, select the appropriate Show option, for example All Projects and Tasks. These options are described in detail in the [ATG Content Administration Guide for Business Users](#).
3. Expand the entry for that project. The name of the current task appears, as shown in the image below, where the Author task appears for the Vacation List (segments) project.



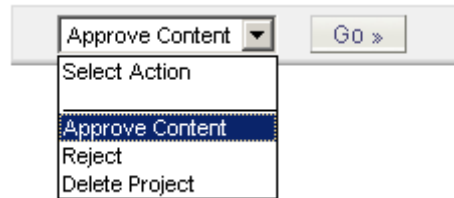
The task name (Author, in the example) is a link you can click to open the project. Note that the task must either be assigned to you or marked as unassigned for the link to be active. For more information on assigning tasks, see the [ATG Content Administration Guide for Business Users](#).

4. Click the task name. When the targeting UI appears, select the appropriate option from the Show menu. For example, if you want to edit a content group that you previously created as part of this project, select Content Groups from the Show menu.

**Notes:**



- If the project has moved beyond the Author task to the Approve Content task, the assets can no longer be edited. To reactivate the Author task and allow asset editing, select Reject from the Select Action menu for the Approve Content task and click Go.



- If any of the deployment tasks are active (for example, Approve for Production Deployment), the assets cannot be edited. To reactivate the Author task in this case, select the corresponding Revert option from the Select Action menu and continue to select this option for each task until the Author task is active again.
- To delete a project, select Delete Project from the Actions menu for the Author or Content Review tasks. When you delete a project, the assets that were created for this project are not added to the versioning system, and any changes you made to existing assets through this project are not preserved in the system as new versions. For more information, see the [ATG Content Administration Guide for Business Users](#).

## Using the Search Tab

Use the Search tab to find and display specific items in the users, organizations, and roles interfaces. For example, to find all user profiles whose Receive Email property is currently set to Yes, you would do the following:

1. Click BCC Home.
2. Under Personalization , click External Users.
3. Display the Search tab.
4. Make sure the asset type is set to User (or a profile sub-type, if appropriate).
5. Enter the values shown in the image below, and then click Search.



The screenshot shows the 'Search' tab interface. At the top, there are three tabs: 'Browse', 'Search', and 'Multi Edit (0)'. The 'Search' tab is selected. Below the tabs, there is a 'Search for' dropdown menu with 'User' selected. Below that, there are four dropdown menus: 'Whose', 'Receive email', 'is', and 'yes'. Below these dropdowns is an 'Add Criteria' button. At the bottom right of the search area is a 'Search' button.

The display changes to show the profiles that meet the criteria. You can view and edit the profiles just as you would through the Browse tab.

For more information on specifying criteria in the Search tab, see [Using the Asset Picker to Select Items](#).

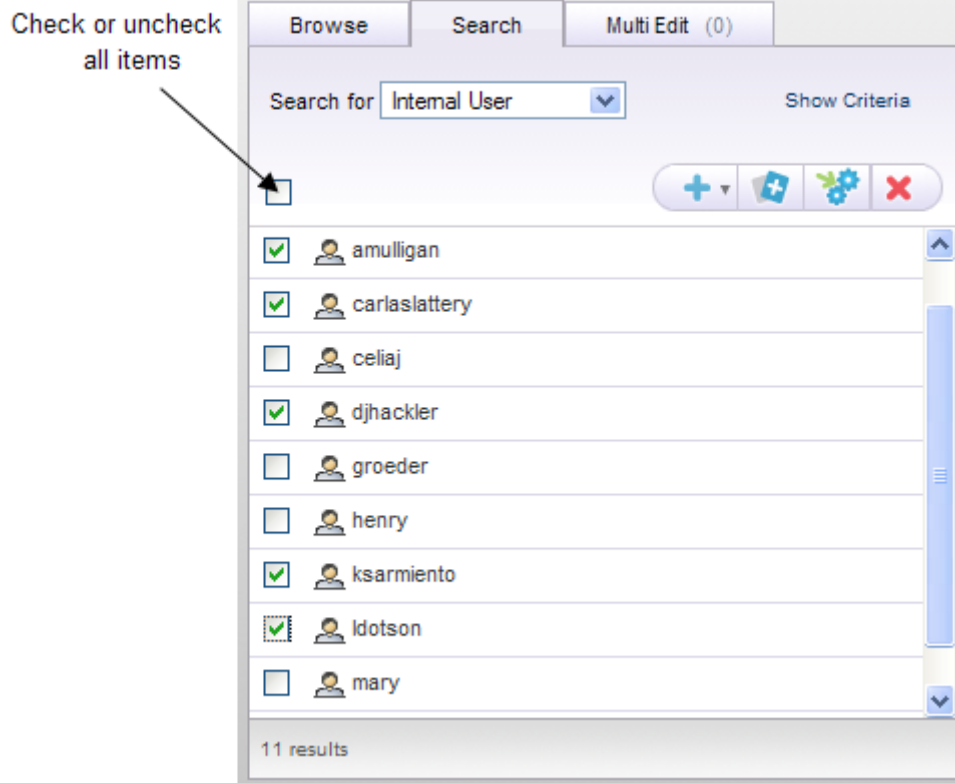
**Note:** For information on creating or editing profiles, organizations, and roles, refer to the [ATG Business Control Center Administration and Development Guide](#).

## Using the Multi Edit Tab

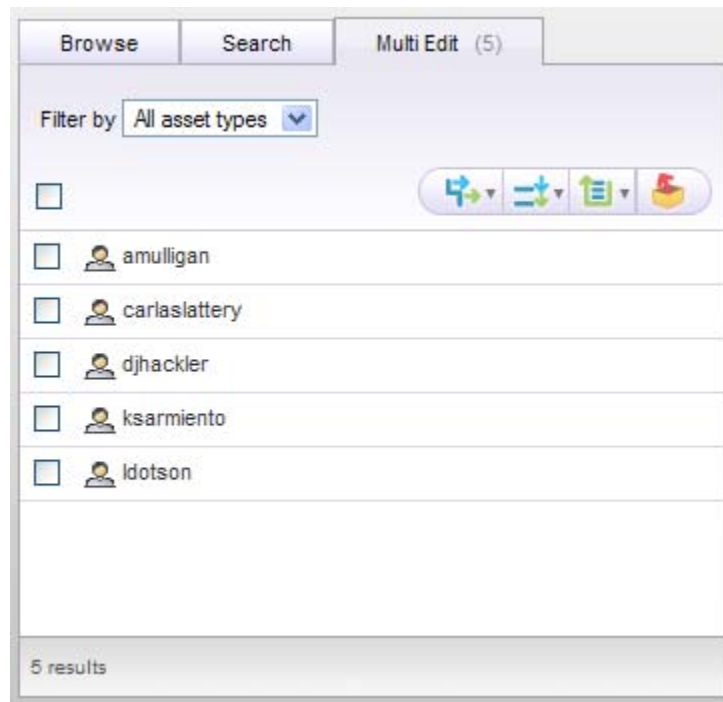
The Multi Edit tab gives you several ways to edit a large number of items more easily. For example, an administrator who wanted to change the Receive Email property to No in all the profiles in the system could use the Multi Edit tab, which would allow him or her to change the property once and apply the change to all profiles. You could also use the Multi Edit tab in combination with the Search tab to perform a batch edit on a specific group of assets. As well as batch editing features, the Multi Edit tab provides different ways to display assets for editing that reduce the number of mouse clicks needed to make the edits (see the descriptions of the Step Edit and List Edit icons below).

To use the Multi Edit tab, complete the following steps. Note that the procedure uses profiles as an example, but it applies to any assets for which the Multi Edit feature is available.

1. In the Browse or Search tabs, locate and select the profiles that you want to edit. Select them by checking the box next to the profile. To select or unselect all profiles, use the checkbox at the top, as shown:

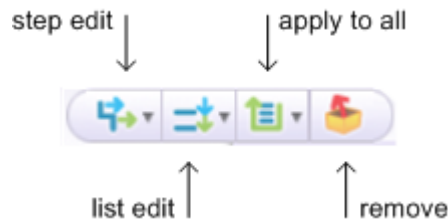


2. Click the Add to Multi Edit icon. The title of the Multi Edit tab changes to show the number of profiles you added.
3. Display the Multi Edit tab.



Controls in the Multi Edit tab are described below.

- The Filter By menu lets you show only assets of the specified type.
- The icons above the list of profiles allow you to do the following:
  - The **Step Edit** icon lets you edit profiles by navigating through them with Next and Previous buttons. Although you edit the profiles individually, using this feature is faster than making the same edits through the Browse tab because you use fewer mouse clicks to access the properties you want to change.
  - The **List Edit** icon displays all the profiles in the editing pane on the right, which allows you to scroll through them and edit them without having to select them first in the list on the left. Like Step Edit, this option lets you edit multiple profiles more quickly by requiring fewer mouse clicks.
  - The **Apply to All** icon lets you perform batch edits of one or more properties. The edits apply to all the profiles selected in the Multi Edit tab. See [Performing Batch Edits](#).
  - The **Remove** icon lets you remove the selected profiles from the Multi Edit tab.

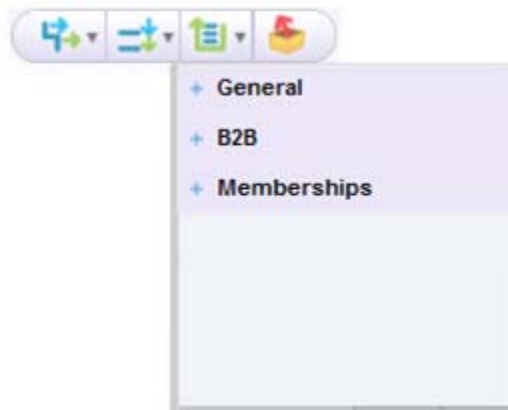


In all cases, you use the checkboxes to select the profiles to which you want the icon action to apply. Use the checkbox above the list of profiles to select or unselect all checked profiles.

### Performing Batch Edits

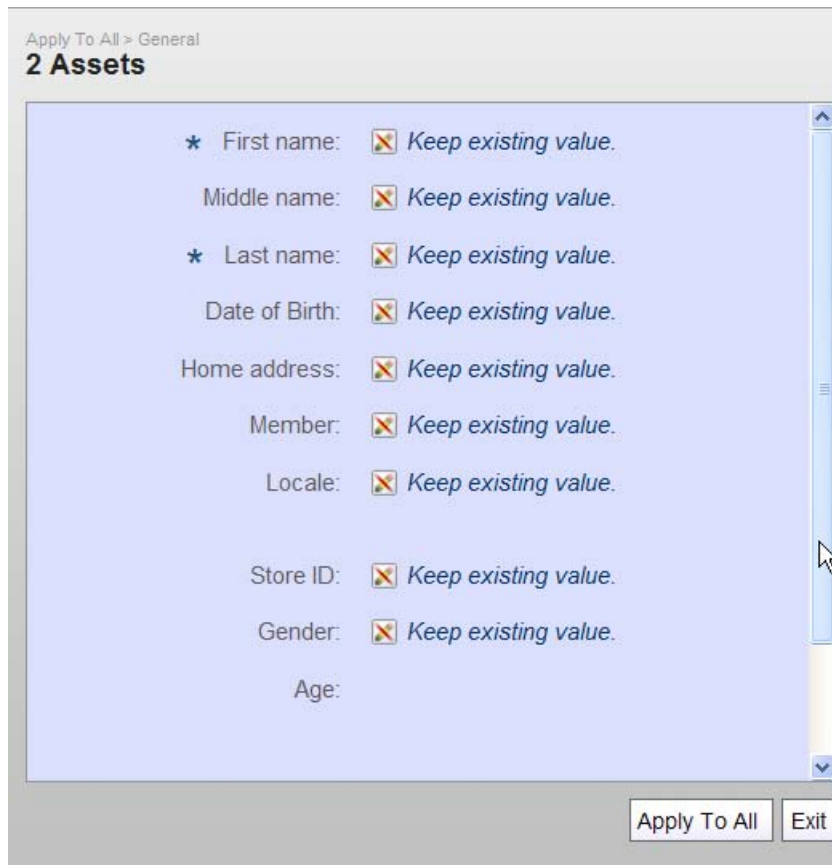
The procedure described here allows you to edit one or more asset properties and have those edits apply to a group of assets. For example, an administrator could use it to change the Receive Email property to No in all the profiles in the system.

1. Add the assets you want to change to the Multi Edit tab.
2. Select the assets to which you want the changes to apply. (This step exists to make editing easier in cases where you are performing many batch edits, some of which you may not want to apply to all assets that you added to the tab.) To select all the assets in the tab, use the checkbox in the icon bar.
3. Click the Apply to All icon and select the group of properties that contains the properties you want to edit.



**Note:** If no property groups have been defined for your system, the message “No property groups exist for this type...” appears. For information on how to set up property groups, refer to the [ATG Business Control Center Administration and Development Guide](#).

4. Locate and edit the properties you want to change.



5. Edit the appropriate properties by clicking the Keep Existing Value field and selecting the new value.
6. Click Apply to All. The display changes to show the number of assets that were affected.
  - The Successful list shows any assets that were changed. A green checkmark also appears next to these assets in the left pane.
  - The Unsuccessful list shows assets that were not changed because one or more errors were encountered during the edit.
  - The No Change Needed list shows assets that were not changed because the property you edited was already set to the new value.
  - The Not Changed list shows assets that were not changed because the edit was interrupted when you initiated another task in the ATG Business Control Center.

The left pane displays a red X next to assets in the Unsuccessful, No Changed Needed, or Not Changed.

To view an asset's current property values, click its name in one of the Details pane status boxes. Information about why an asset was not changed also appears for assets from the Unsuccessful box.



7. Click Exit. The editing panel disappears.

You do not need to remove the assets from the Multi Edit tab before continuing with other activities in the ATG Business Control Center. Be aware, however, that the assets will remain added to Multi Edit until you start a new activity through the BCC Home page or log out. To remove assets from the tab, select them and click the Remove icon.

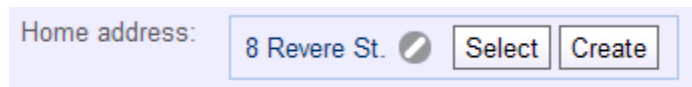
## Editing Asset Properties

The way you enter values depends on the type of property you are working with. Some of the more complex property controls, such as controls for properties that can contain more than one value, are described below.

- Some properties contain Select and Create buttons, as shown:



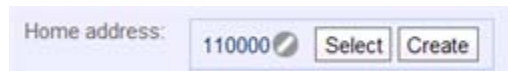
These buttons appear for properties whose value is another repository item type with its own properties. For example, a Home Address property could be linked to a repository item type called Contact Info, with address, state, and zip code properties. Use the Create button to create a new item of the required type (for example, a Contact Info item). Use the Select button to select an existing item.



You can edit an existing entry by clicking the property value, which appears in blue, as shown in the image above. Bear in mind, however, that editing the properties here changes the item in the underlying repository, which means the change applies wherever this item is used (for example, in other user profiles).

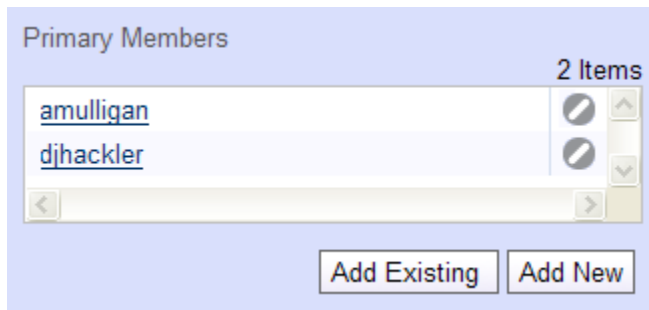
To remove an existing entry, click the Clear icon.

**Note:** If the properties of the linked-to repository item are empty, the repository item's ID is displayed as the value, as shown below.



- Some properties can contain multiple values:





Use the Add New button to create a new item and add it to the list. The item is added to the system and can be used elsewhere. Use the Add Existing button to add an item you or another user already created.

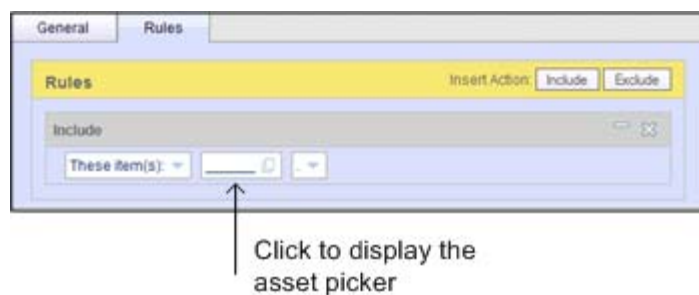
To remove an item from the list, click the Remove Item icon for that item. Removing the item here does not remove it from your system.

- Required properties have an asterisk next to their names. You cannot save a new asset if any required properties have not been specified.

## Using the Asset Picker to Select Items

During the process of creating and editing targeting assets, you sometimes need to use the asset picker, which is a dialog box that allows you to locate and select one or more items for inclusion in the current activity. For example, when you are creating the rules that define a content group, and you want to use the Items in Folder option to include items from a specific folder, you use the asset picker to select the folder.

To display the asset picker, click the field where you want the specified item to appear, as shown below:

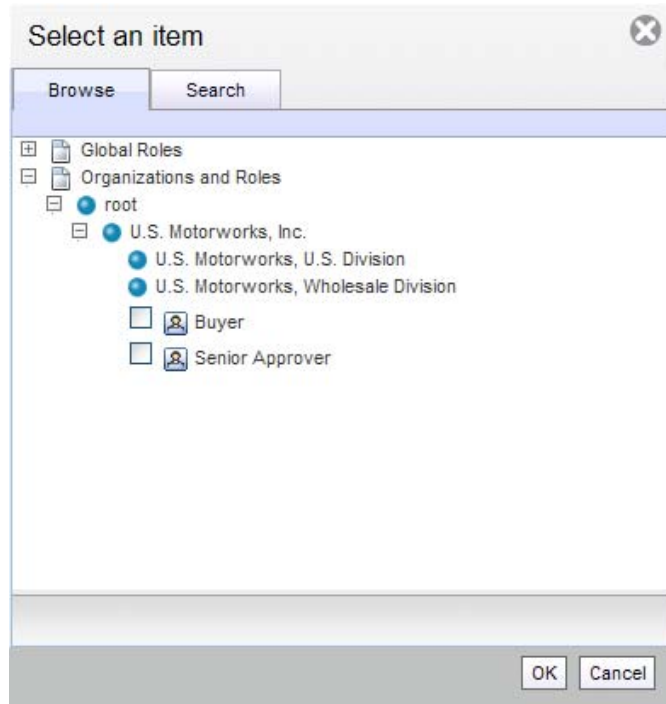


The appearance of the asset picker varies depending on the type of item you are working with, but the basic procedures for using it are the same. See the next sections, [Asset Picker: Browse Tab](#) and [Asset Picker: Search Tab](#).



### Asset Picker: Browse Tab

Some item types are configured so that you can use a Browse tab to locate them. The items are displayed in a hierarchy of folders. The following image shows the Browse tab. In this case, the items are roles (this tab would appear, for example, if you added a People with Roles rule to a user segment).

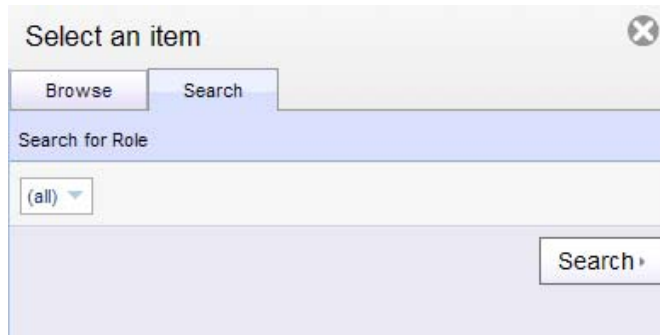


Expand the folders until the items you need are displayed. Use the checkboxes that appear next to the items to select them, and click OK.

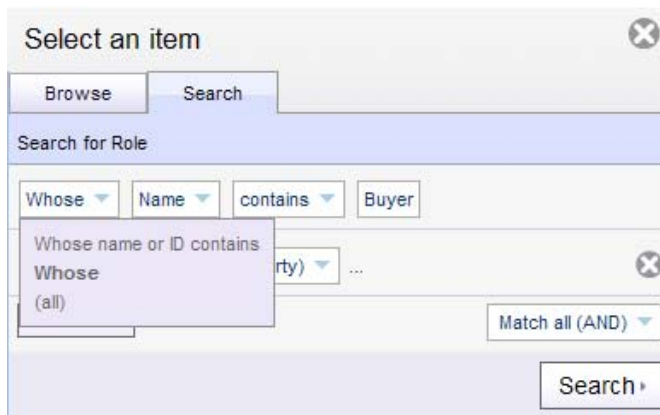
### Asset Picker: Search Tab

If the asset picker contains a Search tab, you can locate items by specifying search criteria. A list is displayed that contains all the items that match the query.

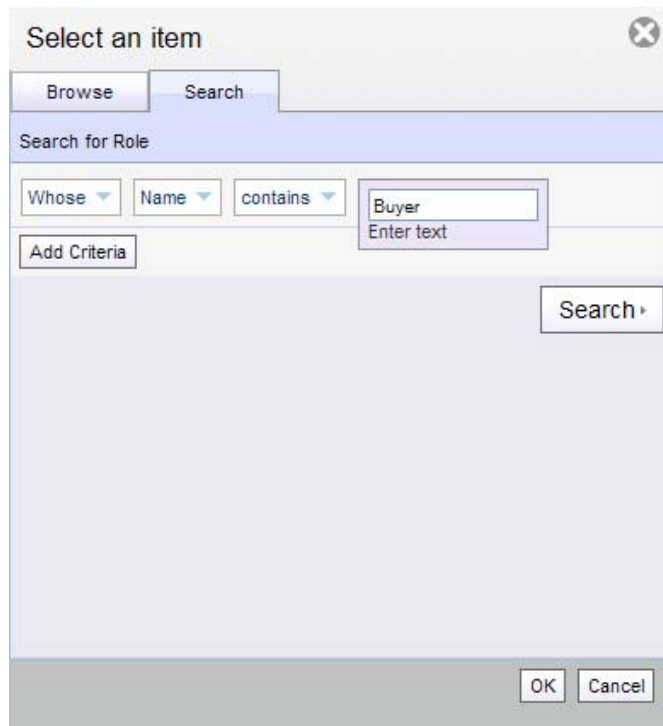
To find all assets of the type you want, choose All:



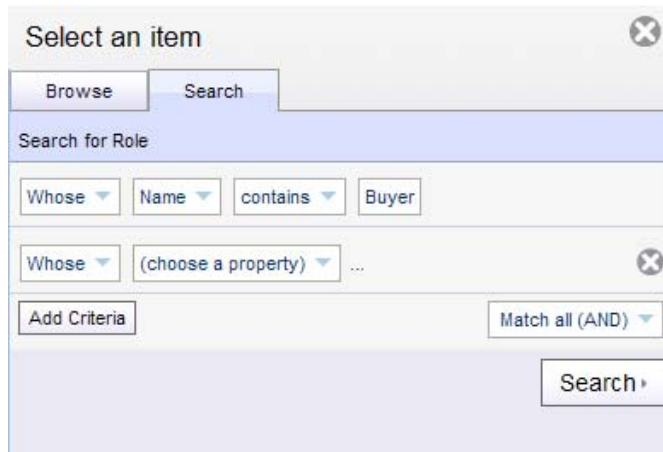
You can narrow the search by querying specific properties. The menu choices depend on the asset type—in this case, Whose or Whose Name or ID Contains:




The following example shows the query for all roles whose Name property contains the string Buyer:



You can narrow the search criteria further by clicking Add Criteria and providing more information about the desired role. If you create multiple criteria, specify the query operator Match All (AND) or Match Any (OR) as necessary:



To remove a set of criteria, click the corresponding Remove  icon.



## Previewing Project Assets

Your ATG Business Control Center environment can be set up to preview project assets so you can evaluate how they will appear on a live Web site. In order to preview assets, the ATG Business Control Center server—and, optionally, other servers—must be configured and assembled as described in the *Setting Up Preview* chapter of the [ATG Business Control Center Administration and Development Guide](#).

Assets can be previewed from any project that you create via the Asset Manager or Content Administration. Preview can be set up to provide a highly flexible matrix of preview applications and user profiles: you can test project assets on one or more applications that are deployed on preview-enabled servers, and evaluate each one from the perspective of different user profiles.

**Note:** A preview session shows only changes for assets in the project where the preview session was launched. All other assets show the state they were in when last checked in.

### **Supported Asset Types**

You can preview the following asset types:

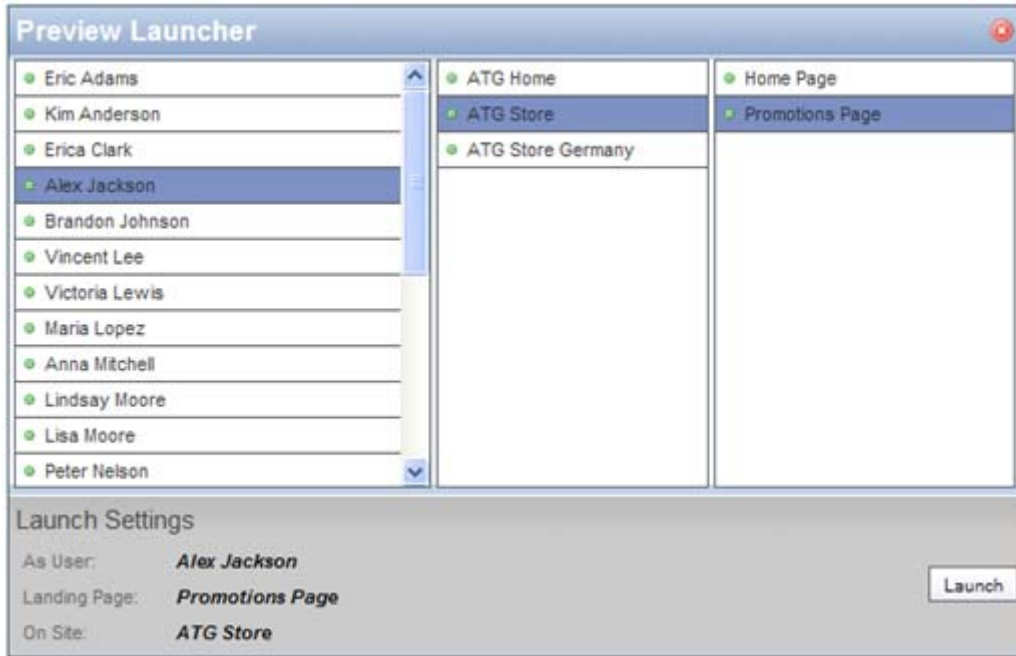
- GSAReposi tory assets, for example product catalog and price list assets.
- Personalization assets: user segments, targeters, content groups, slots, and scenarios.

### **Previewing Assets**

To preview assets, complete the following steps:

1. Add the assets you wish to preview to a project.
2. Modify asset properties and save your changes.
3. From the Details pane or asset properties window, click Preview As.

Preview As opens the Preview Launcher dialog, where you select a user profile and preview URL, or *landing page*. If your ATG installation is set up to support more than one Web site, you also select the site you want to use for the preview:



Refer to the [ATG Multisite Administration Guide](#) for more information on configuring an ATG installation to support multiple Web sites.

4. Click Launch to open a browser window and start a preview session that uses the selected landing page, site, and profile.

After you launch a preview session from an asset, its properties window displays Preview and Preview As buttons:

- **Preview** uses the user profile and landing page settings from the last preview session launched from that asset to start a new preview session.
- **Preview As** opens the Preview Launch dialog, where you can change preview settings before launching a new preview session.

## Launching Multiple Preview Sessions

You can launch multiple preview sessions for any asset in a project. Doing so can help you evaluate different combinations of launch sites and preview profiles. For example, you can launch multiple sessions that test a scenario on the same site with different user profiles; or evaluate how the same scenario operates on different sites. You can also modify the same assets in different projects and launch preview sessions from each project in order to compare the changes.

## Changing Preview Users in a Preview Session

In each preview session, the browser displays the following controls:



- **As User** is a drop down menu of preview profiles. Use this menu to change the user profile. Then click Preview Landing Page to refresh the page with the new profile.

Changing user profiles during a given session has no effect on the settings that are used when you launch a new session.

- **Preview Landing Page** refreshes the browser window with the original preview URL.
- **Remove Frame** removes the frame from the pages in the current session.

### Launching a Preview Session Outside the ATG Business Control Center

Users can preview project asset changes outside the framework of the ATG Business Control Center. For example, you might want employees or outside reviewers who lack ATG Business Control Center login privileges to evaluate changes to a Web application while it undergoes development. If your environment has non-BCC servers that are enabled for preview, you can provide URLs to the launch pages on these servers to reviewers. They can invoke these URLs from any browser window.

**Note:** Users who are not logged into the ATG Business Control Center can invoke preview sessions only with URLs to a server where the ATG Business Control Center is not running. In order to avoid security breaches, URLs to preview sessions on the ATG Business Control Center server are blocked.







## 3 Targeting Concepts

The targeting items enable you to display dynamic, personalized content to Web site visitors. A targeter defines product items to display to site visitors who meet the targeter's criteria. The targeter also specifies the times and conditions under which to issue the display.

The three types of targeting items work together:

- *User segments* are groups of users who have similar interests or requirements that make them good candidates for targeted content. For example, certain items may appeal to "people whose interests include hiking" or "people who live in New York."
- *Content groups* are items that share some characteristics that may be of interest to a group of users. For example, you could set up a content group that contains products that are related to hiking, and then configure a targeter that displays the products, in rotation, to the appropriate user segment.
- *Targeters* are the business rules that specify what content to show, what visitors to show the content to, and under what conditions to show it. For example, "Show article X to people who live in New York on every Monday of the month."

When an environment has one or more registered sites, the user interface displays extensions to the rule configuration for these targeting items. The additional configuration makes these items site-aware. See [Multisite Targeting Rules](#).

Because targeting items are referenced by the pages on your Web site, they must be accessible to those pages. All user segments, targeters, or content groups that you create must be published to your live sites, along with the other items that are necessary, such as individual content items, images, style sheets, and the Web pages themselves. ATG Content Administration manages the process of publishing assets such as targeting items from a development environment to the live site.

### How Targeters Work with Site Displays

Two mechanisms exist to display content on a site page:

- A targeter defines product items for display to site visitors who meet the targeter's criteria. The targeter also specifies the times and under what conditions to display the results. A page developer incorporates the content display on the site page.
- A slot is defined for the site page. When an active slot is empty, the slot triggers an event. A scenario traps the event. The scenario defines content and displays it in the slot, or the scenario uses a targeter to define the content.

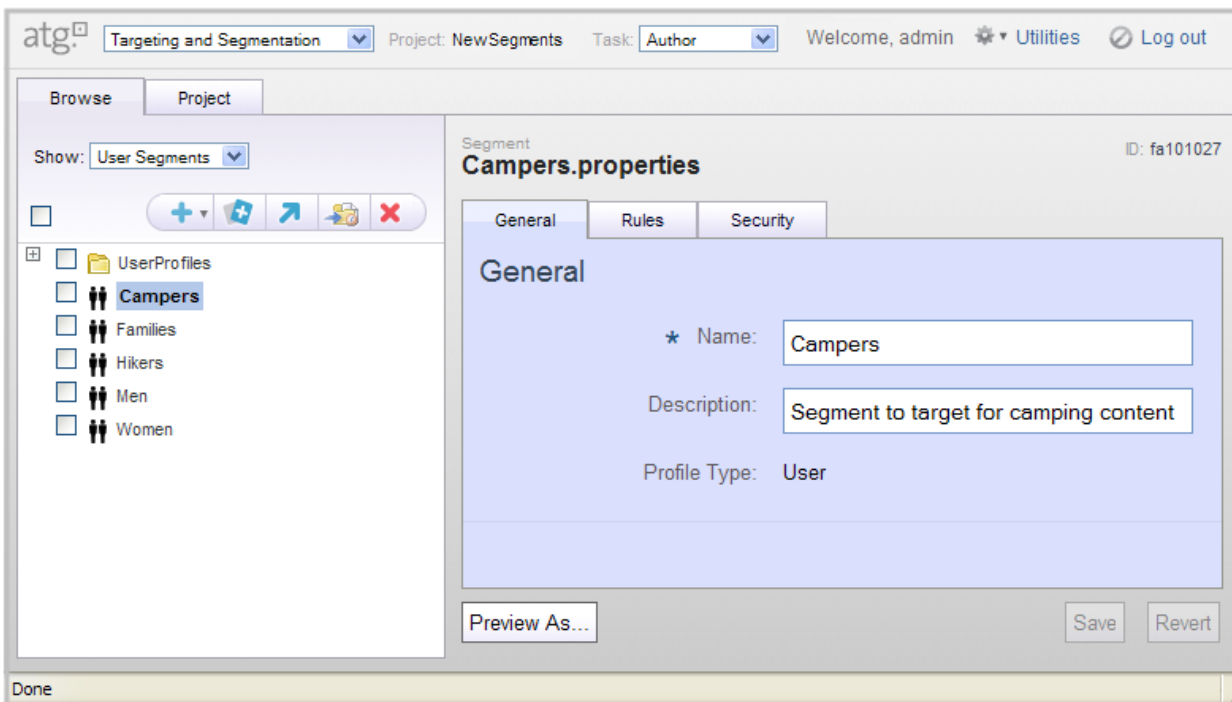


In a multisite environment, the multisite rules are evaluated when the site visitor requests a page that involves a targeter. See [Multisite Targeting Rules](#).

## Targeting Interface

You use the targeting interface to create and edit user segments, content groups, and targeters. The chapters that follow this one give specific procedures for working with each type of item. This section provides an overview of the interface and describes its main elements.

The following image shows the panels and other items that make up the targeting interface.

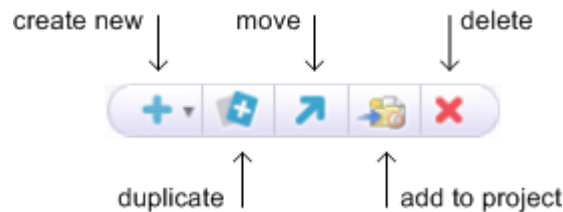


- The Project label shows the name of the project being used to manage the creation or editing process. In this case, the project is called NewSegments. See [Project Basics](#) for more information.
- The Task menu, which displays the current task name (Author, in this case), contains the actions you can perform as part of the current task. When you have finished creating or editing all the items in the project, you use this menu to activate the next task in the project, typically Content Review.
- The Browse tab displays a list of all existing items of the type indicated by the Show menu. In the illustration, five user segments represent all the segments that currently exist in the system.



**Note:** The items in the Browse tab are not necessarily in the current project. However, any item you create is automatically added to the project.

- The Project tab shows all items that have been added to the current project. These are the items that will be deployed to the live site when the project is complete.
- The icons in the Browse tab allow you to do the following:
  - **Create a New** item of the type that appears in the Show menu.
  - **Duplicate** the selected item(s). This action gives you a quick way to create several similar items. You create one, and then duplicate it as many times as needed, making appropriate changes to the duplicates. For items that have many complex rules, this technique can save time.
  - **Move** the selected item(s) to a different parent folder.
  - **Add** the selected item(s) to the current project (see [Project Basics](#)).
  - **Delete** the selected item(s).



In all cases except Create New, you use the checkboxes in the Browse list to select the item or items to which you want the icon action to apply. Use the checkbox next to the icon bar to select or unselect all items.

- The name of the current item, in this case a segment called Campers. properties, appears at the top of the right pane.
  - The General tab contains fields where you enter basic setup information for this item, such as a name and some descriptive text. The item whose information displays here is the one selected in the Browse tab—the Campers segment, in this example.
  - The Rules tab allows you to enter the detailed information that defines this item; for example, the rules that make up the inclusion or exclusion criteria for a user segment. The Rules tab is described in detail later in this guide.
  - The Save and Revert buttons allow you to preserve or undo any changes you make to this item.
- Note:** When you start creating an item, a Create button appears instead of Save.
- To return to the BCC Home page, select BCC Home from the dropdown menu above the Browse and Project tabs.



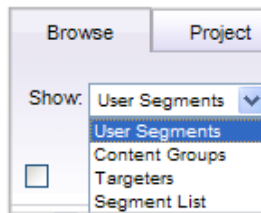
## Viewing Targeting Items

To view the user segments, content groups, or targeters in your system, complete the following steps:

1. From the BCC Home page, select Personalization > (Targeting and Segmentation) Browse.



2. From the Show menu, select the type of targeting item you want to view:



3. All items of the selected type appear in the Browse list on the left, if they meet the following criteria: The item was added to a project and was checked in to the versioning system, which typically occurs when the project's Deploy task is marked as complete. For more information, refer to the section, [Project Basics](#). See also the [ATG Content Administration Guide for Business Users](#).

When you select an item in the left pane, the right pane shows the details for the item.

## Working with Folders

Targeting items are managed in the ATG Content Administration system as file assets with . properties extensions. By default, the items are stored in the following location:

```
<ATG10dir>\home\Publishing\versionFilesStore\PublishingFiles
```

where <ATG10dir> refers to the ATG 10.0.2 installation directory; for example, C:\ATG\ATG10.0.2.

Within the ATG Business Control Center, assets are tracked through a path in the ATG registry, which is an internal directory structure that allows ATG modules to access items created within other modules. By default, targeting items have the following path in the registry:



- User segments and content groups: /atg/registry/RepositoryGroups
- Targeters: /atg/registry/RepositoryTargeters

The last part of the path, RepositoryGroups or RepositoryTargeters, is a folder in the registry. In some cases you may want to use a different folder. The next section includes instructions to specify a different folder.

## Specifying the Parent Folder when You Create an Item

When you create an item, you can specify a parent folder. You can change that selection up to the time you click Create.

To select a parent during item creation:

1. Click Select Parent at the top right of the new item details pane in the targeting interface.
2. In the asset picker, click the button next to your choice, then click OK. Note that the root directory, which does not appear in the left pane display, appears on the asset picker list. You can choose any folder that exists below the root (RepositoryGroups or RepositoryTargeters).

The name of the folder you select appears above the Select Parent button.

3. If this is the last action in the creation process, click Create. Otherwise, finish the configuration and then click Create.

## Moving an Item to a New Parent Folder

After a targeting item has been created, the Select Parent button is no longer available. To change the location of an item in this situation, use the Move feature.

To move a targeting item:

1. In the Browse pane, check the checkbox of the item you want to move.
2. Click the Move icon (arrow) and select Move.
3. In the asset picker, check the radio button next to the intended destination folder, and Click OK. Note that the root directory, which does not appear in the left pane display, appears on the asset picker list. You can choose any folder that exists below the root (RepositoryGroups or RepositoryTargeters).

The left pane shows the item in its new location in the tree.

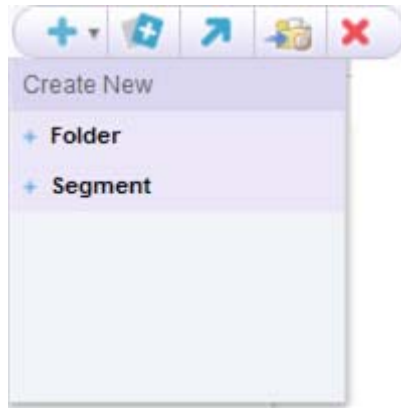
## Creating a Folder

To create a folder for a targeting item:

1. From the BCC home page, do one of the following:
  - From the To Do list, choose a Manage Commerce Assets project, and click Author.



- Create a project: In the browse pane, open Merchandising and click Manage Commerce Assets. Supply a Project Name and, optionally, a Project Description.
2. Select **Targeting and Segmentation** from the application switcher dropdown list at the top of the left pane.
  3. Select an item type from the Show list.
  4. Click the Create New icon.
  5. Select Folder.



6. Specify a name for the new folder.
7. Click Create.

The new folder appears in the Browse list (you may have to refresh the page to see it). It is also added to the project as an asset and will be deployed to the live sites when the project is complete.

### Deleting Segment or Content Group Folders

Segments and content groups share folders. Any folder you create in the segment or the content group interface is added to the path atg\registry\RepositoryGroups and can store assets of either type. However, in the segment interface, content groups are hidden, and in the content group interface, segments are hidden. For this reason, if you attempt to delete what appears to be an empty folder in either interface, you may see the following error message:

Error: Cannot delete the folder because it has contents which may not be displayed in the current view.

The error occurs because the folder you are trying to delete contains items that are hidden because they are not the type of asset you are editing.

The same error can appear if other types of filtering are occurring. For example, if you are working in a project that references the external user profile repository, assets that apply to internal users are hidden.



## Multisite Targeting Rules

In a multisite environment, the user interface displays extensions to the rule configurations for the targeting items: user segments, content groups, and targeters. You can use the rule extensions to make these items site-aware.

The following table shows the possibilities for each item type:

Targeting Item	Multisite Rule Features
User segment	Specify the site on which a rule executes.
Content group	Specify the site on which a rule executes. Specify the site on which to search for content.
Targeter	Specify the site on which a rule executes. Specify the site on which to search for content.

The multisite configuration extensions appear only in the rules. The remaining configuration options for a targeting item are the same in a multisite environment or an unregistered site environment.

The following chapters in this guide contain instructions for the creation and basic configuration of these items:

- [User Segments](#)
- [Content Groups](#)
- [Content Targeters](#)

This section adds to those instructions by explaining how to configure and use the multisite rule extensions for these items.

If you work in an unregistered site environment, you do not need the information in this section.

If you work in a multisite environment, read this section before you start to configure a user segment, content group, or targeter. The decisions that you make regarding the multisite rules affect your choices for the remaining configuration options.

The following approach is recommended for planning and configuring multisite targeting:

1. Determine the goals for the site.
2. Plan a strategy for achieving the goals: What actions must occur on each site?
3. Decide what targeting items are required.
4. Plan the interaction of the targeting item rules.
5. Create and configure the targeting items.

The section [Examples of Multisite Rule Use](#) shows two basic examples of using multisite rules.



## When Multisite Rules Are Evaluated

The multisite rules are evaluated when the site visitor requests a page that involves a targeter. (See [How Targeters Work with Site Displays](#).) These rules include the targeter's rules and the rules for the user segments and content groups that are referenced by the targeter. The rules are evaluated in the context of the *current production site* (where the site visitor is). This evaluation determines which rules to execute.

## Multisite Rule Types

Instead of one rule or rule set per targeting item, which is standard in an unregistered site environment, a multisite environment supports one default rule and zero or more site override rules *per targeting item*.

### Default Rules

Each user segment or content group has *one* default rule. A targeter has one default rule set group.

The default rule is required; it cannot be deleted. The default rule executes on the current site (where the site visitor is), unless a site override rule specifies that site for its own execution. If one or more site override rules, collectively, specify all the sites, the default rule will never be executed. However, the default rule exists for the standard case, as well as for the exceptional one.

### Site Override Rules

Each user segment or content group can have zero or more site override rules; a targeter can have zero or more override rule set groups.

Each site override rule specifies one or more sites on which to execute. This enables you to specify different behavior on different sites.

Site override rules must meet the following requirements:

- A site override rule must specify at least one execution site.
- Two site override rules for the same targeting item (user segment, content group, or targeter) cannot specify the same execution site.

## The Rules Tab

In the editing pane of a personalization asset, the Rules tab displays and manages multiple multisite rules. The Save and Revert actions apply to all the rules on the page.

The Default Rule or Rule Set appears at the top of the Rules pane, under the title **Default Rule**.

One or more Site Override Rules or Rule Sets appear below the Default Rule. When you add site override rules, the system generates sequential, numeric names:

Site Override Rule 1  
Site Override Rule 2  
Site Override Rule 3





## Making Site Selections

When you create a multisite override rule for a user segment, content group, or targeter, you can use the Executes On selection to specify one or more sites on which the rule executes. When you configure a content group or a targeter, you can also specify on what site to look for content—the As Seen On selection..

Site selector selection lists for multisite rules include all registered sites, regardless of state—which may be one of the following:

- Enabled; normally, this means available to external and internal users
- Enabled: pre-launch
- Enabled: post-closed
- Disabled; normally, this means available only to internal users

### As Seen On

On the rules for a *content group* or a *targeter*, you use the As Seen On site filter to specify one or more sites on which to search for content. If you do not make any selection, the default is to search only the current production site.

To enable the As Seen On site filter, you must make certain Content Source and Content Type selections *before* you click the Rules tab when you create a content group or a targeter. Select a Content Source that is a multisite repository item with site membership, and a Content Type that has site membership. Out of the box, the selections that qualify are:

- **Content Source:** ProductCatalog
- **Content Type:** Category, Product, or SKU

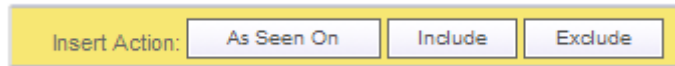
The screenshot shows a configuration window with two tabs: 'General' and 'Rules'. The 'General' tab is active. It contains the following fields:

- Name:** ShowLatestWear
- Description:** (empty text box)
- Content Source:** ProductCatalog
- Content Type:** Product
- Profile Type:** User

*Content Source and Content Type selections on the General tab*

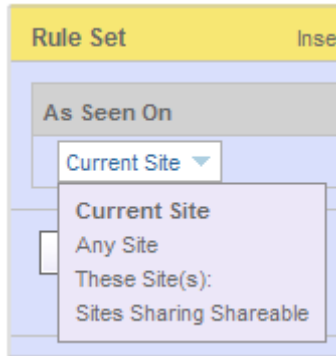
To use the As Seen On site filter:

1. Click the As Seen on button at the right of the rule header.



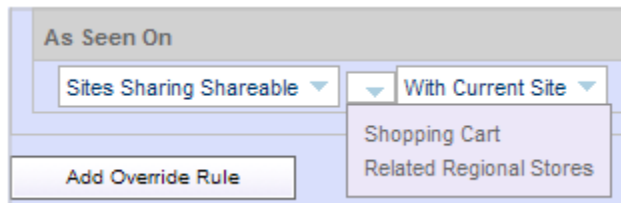
The site selector dialog opens.

2. Click the As Seen On selection box. The As Seen On dialog box appears.
3. Click Current Site to see the menu.



The choices are:

- Current Site  
Current Site is the default when you select As Seen On and do not choose another site. It is also the default behavior when you do not use the site filter (you do not choose As Seen On).
- Any Site
- These Site(s)  
Click the new box that opens to see a list of sites. Check the checkbox next to one or more choices and click OK.
- Sites Sharing Shareable  
Click the arrow between Sites Sharing Shareable and With Current Site to see the shareable selections. To make a selection, highlight your choice.



Click With Current Site to see the alternate choice: With Site.



If you select With Site, another box appears. Click the arrow in the (choose a site) box to see a list of sites. Select your choice by highlighting it.

The list of potential sites includes all registered sites, regardless of their operating states, as described above in [Making Site Selections](#).

4. Finish the rest of the rule configuration.
5. Click Create.

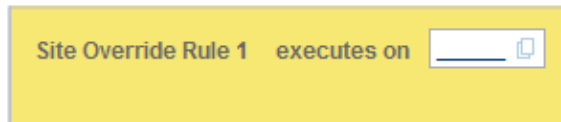
When a targeter references one or more content groups and the rules for both items use site filters, the As Seen On site filters must not explicitly conflict. Avoid a configuration such as the one in the following table:

Content group configuration	Targeter configuration
Override rule to execute on Site D: As Seen On <b>Site C</b> ←CONFLICT→	Override rule to execute on Site D: As Seen On <b>Sites A and B</b>

**Executes On**

To specify the site on which the rule should execute:

1. Click the Add Override Rule or Add Rule Set button.  
The override rule or rule set opens.



2. Click the Executes On text box.  
A list of execution sites appears. Use the check box to select the intended site, then click OK.  
The list of potential execution sites includes all registered sites, regardless of their operating states, as described above in [Making Site Selections](#).
3. Finish the rest of the rule configuration.
4. Click Create.

**Reusing Content Group Rules from an Unregistered Site Environment**

A content group rule that ran in an unregistered site environment will run in a multisite environment. Without reconfiguration, the rule will execute on and include content from only the current site. Therefore, if the previous collection of content items is not associated with that site, results from the



complete collection will not be included. Using multisite rules, you can reconfigure the content group to include items on all sites, or to refine the selection.

## Examples of Multisite Rule Use

Multisite rules provide different ways to achieve targeting goals. This section describes two configurations to illustrate basic multisite rule interactions.

### **Example 1: LatestGear Sports**

LatestGear Sports maintains three sites that sell specialty sporting gear:

- Site A: LatestGear - Golfing
- Site B: LatestGear - Kayaking
- Site C: LatestGear - Skiing

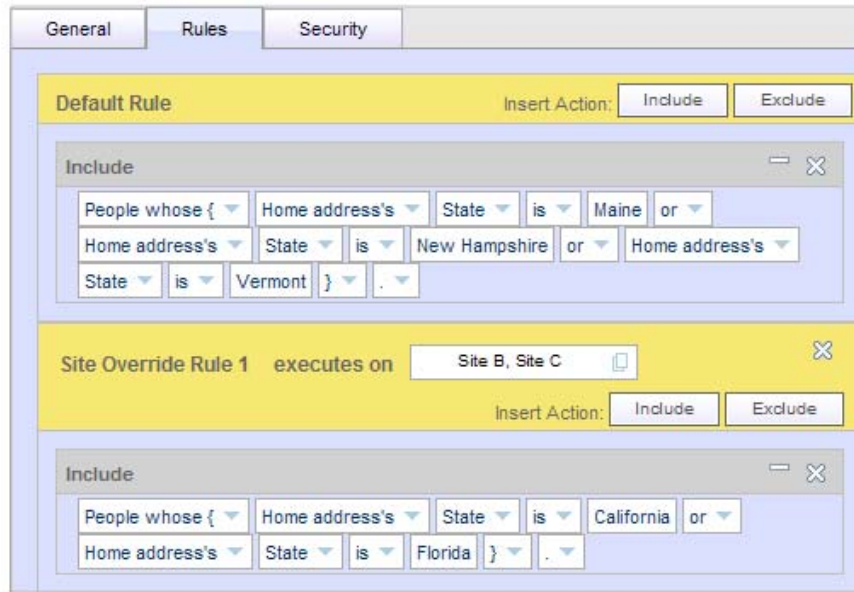
LatestGear Sports wants shoppers who live in selected states in the U.S.A. to see gear for sports that are popular in those states, no matter what site these shoppers visit. The display of these items depends upon the site of the current visit and the shopper's address.

The configuration for this example includes one user segment, one content group, and two targeters. The definition of the user segment and the content of the content group are dynamic; both depend on the execution site. When the rules for these items are configured as shown below, this is the result:

- On site A, all shoppers see all the golfing items on site A. Shoppers who live in Maine, New Hampshire, or Vermont also see kayaking and skiing items from sites B and C, as defined by the content group SelectedGear.
- On site B, all shoppers see all the kayaking items on site B. Shoppers who live in Florida or California also see golfing items from site A, as defined by the content group SelectedGear.
- On site C, all shoppers see all the skiing items on site C. Shoppers who live in Florida or California also see golfing items from site A, as defined by the content group SelectedGear.

The configuration for Example 1 includes:

- User segment: SpecialAddresses; the definition depends on the execution site.  
Default Rule: Include people whose home address is in Maine or New Hampshire or Vermont. This rule executes only on site A, because a site override rule exists for sites B and C.  
Site Override Rule 1: Include people whose home address is in California or Florida. This rule executes on Sites B and C.



*Rules for user segment SpecialAddresses*

- Content group: SelectedGear; the definition depends on the execution site.  
 Default Rule: Include skiing and kayaking items from sites B and C catalog folders. This rule executes only on site A, because a site override rule exists for sites B and C.  
 Site Override Rule 1: Include golfing items from site A catalog folders. This rule executes on sites B and C.



General Rules Security

**Default Rule** Insert Action: As Seen On Include Exclude

As Seen On - ×

These Site(s): Site B, Site C 📄

Include - ×

Items whose { Default description contains (ignore case) ski or Default description contains (ignore case) kayak } .

**Site Override Rule 1** executes on Site B, Site C ×

Insert Action: As Seen On Include Exclude

As Seen On - ×

These Site(s): Site A 📄

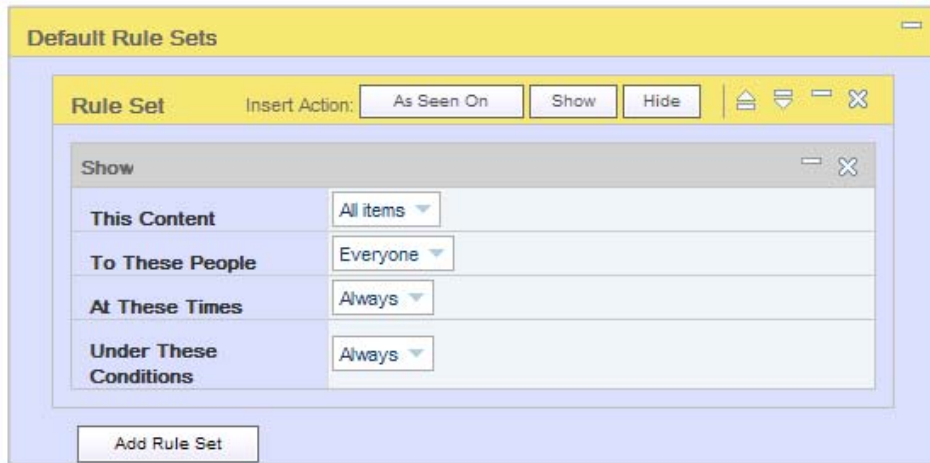
Include - ×

Items whose { Default description contains (ignore case) golf } .

*Rules for content group SelectedGear*

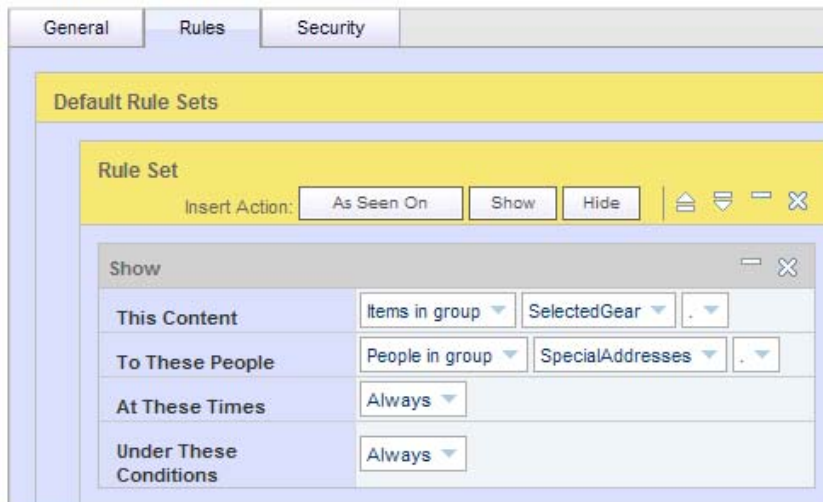
- Targeter: ShowAllGear

Default rule: Show All Items to Everyone Always. This rule executes on any current site (A, B, or C), because no override rules exist. The unused site filter (As Seen On) defaults to Current Site.



Default rule set for targeter ShowAllGear

- Targeter: ShowSelectedGear  
 Default Rule Set: Show items in group SelectedGear to people in group SpecialAddresses. This rule executes on any current site (A, B, or C), because no override rules exist. However, the behavior is not the same on all sites, because the items in the content group SelectedGear and the members of SpecialAddresses are site-dependent. The As Seen On site specifications in the content group Selected Gear override the As Seen On default value in the targeter, which is Current Site.



Default rule set for targeter ShowSelectedGear



**Example 2: LatestWear Women's and Men's Apparel**

LatestWear Women's and Men's Apparel supports two sites:

- Site A: TrendyDiscounts
- Site B: ExecutiveTrends

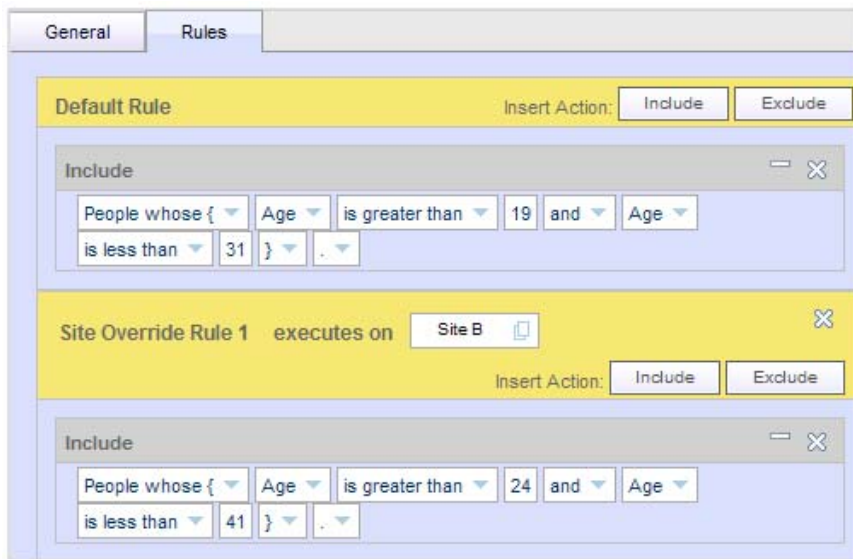
LatestWear wants younger shoppers to see only items that are styled to appeal to a younger age group. Each site has a different age range that qualifies as "young."

The configuration for this example includes one user segment, one content group, and two targeters. The definition of the user segment and the content of the content group are dynamic; both depend on the execution site. When the rules for these items are configured as shown below, this is the result:

- On site A, shoppers whose ages are 20-30 see only targeted items from site A. Shoppers whose age is not in the range 20-30 see all items on site A.
- On site B, shoppers whose age is 25-40 see only targeted items from site B. Shoppers whose age is not in the range 25-40 see all items on site B.

The configuration for Example 2 includes:

- User segment: YoungShoppers; the definition depends on the execution site.  
 Default Rule: Include People whose age is 20-30. This rule executes only on site A, because an override rule exists for site B.  
 Override Rule 1: Include People whose age is 25-40. This rule executes on site B.



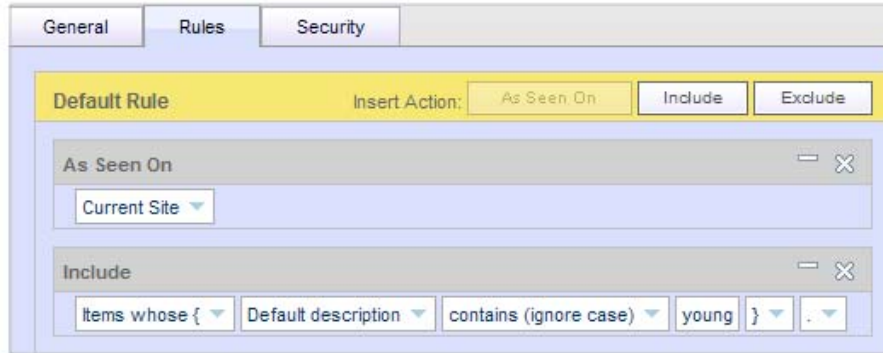
*Default rule for user segment YoungShoppers*

- Content group: YoungWear; the content depends on the execution site.





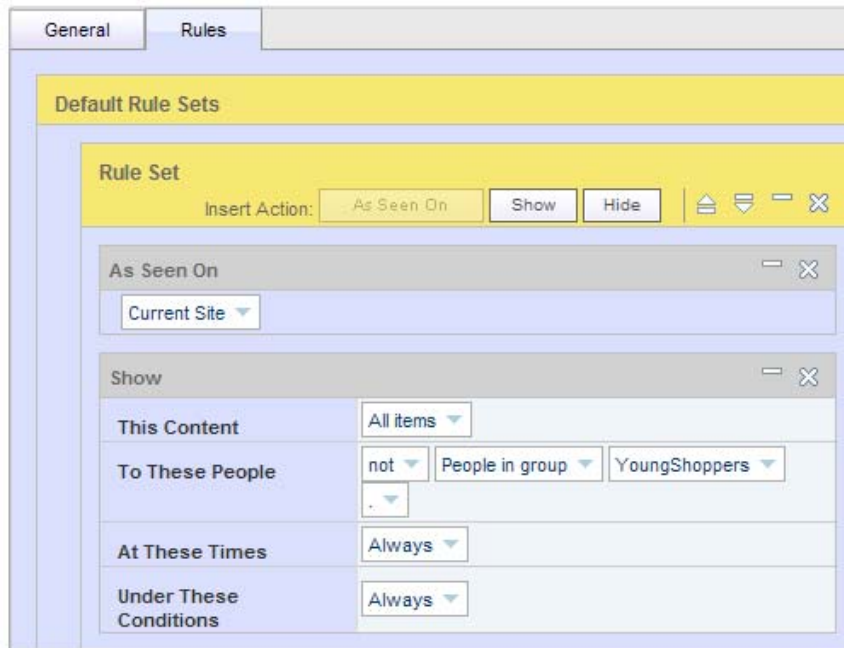
Default Rule: Include items As Seen On Current Site whose Default description contains "young." This rule executes on site A or B, because no override rule exists.



*Default rule for content group YoungWear*

- Targeter: ShowStandard

Default Rule Set: Show all items to people not in group YoungShoppers. This rule executes on site A or B, because no override rule exists.

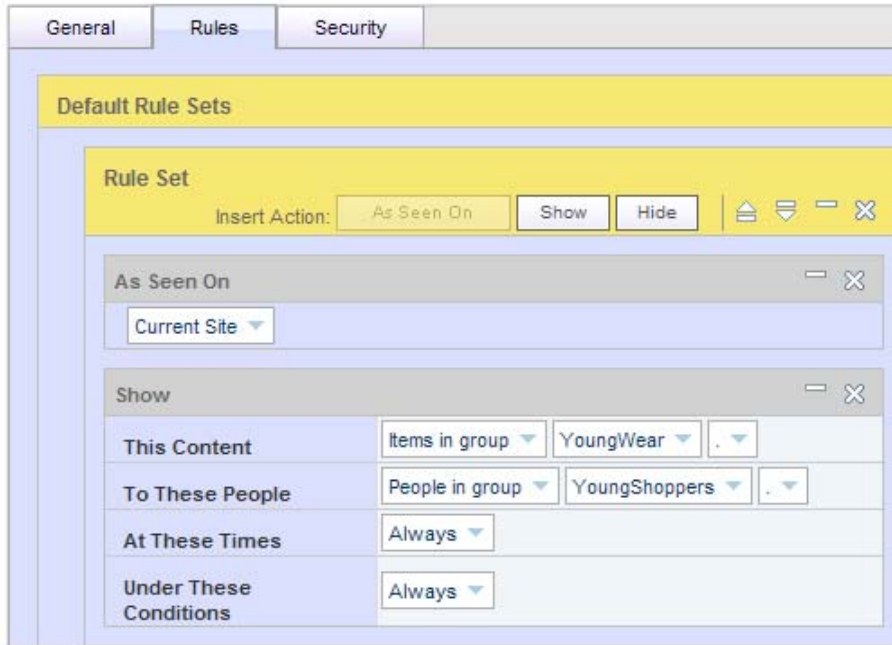


*Default rule set for targeter ShowStandard*

- Targeter: ShowYoungWear



Default rule: Show items in content group YoungWear to people in user segment YoungShoppers. This rule executes on site A or B because no override rule exists. The items in YoungWear and the members of YoungShoppers are site-dependent.



*Default rule set for targeter ShowYoungWear*



## 4 User Segments

A **user segment** represents a group of people in your target audience. You create segments by defining rules that include or exclude users according to their profile properties. For example, you could create a segment called High Earners that includes female college graduates earning more than \$150,000 per year but excludes people from California. The rules that define this segment might look something like this:

```
InClude these people:
  people whose Gender is Female
  and whose educationLevel is College Graduate
  and whose annualIncome is greater than 150000.00
-----
ExClude these people:
  people whose Home address's State is Cal i forni a
```

Once you set up this segment, you can use the Targeters window to create targeting rules for delivering personalized content to people who match the High Earners criteria. For example:

```
Show this content:
  newLuxuryCars
To these people:
  people in group Hi ghEarners
```

As you can see, segmenting your target audiences can simplify your targeting rules and make them easier to maintain.

### Creating a User Segment

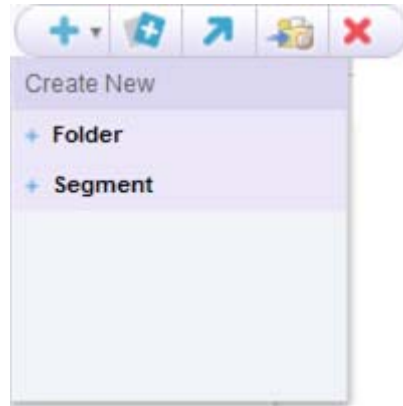
Whenever you create a user segment, the system assigns a new property with the same name as the segment to every profile of that type in the repository. It sets that property to "true" or "false" according to whether the profile meets the criteria for that segment. For example, if you create a segment called High Earners for profiles of type Investor, the system gives every Investor profile a new property called Hi ghEarners. If a profile fits the criteria for that segment, the system sets the Hi ghEarners property in that profile to "true." If a profile does not fit the segment criteria, the Hi ghEarners property is set to "false." The system uses this method to determine which profiles belong to each user segment.

To create a segment:

1. From the BCC Home page, select Personalization > Targeting and Segmentation.



2. Specify a name and an optional description for the project that will manage the creation and versioning of the new segment.
3. Select User Segments from the Show list.
4. Click the Create New... icon and select Create New > Segment.



5. Complete the fields in the General tab as follows.

**Name:** Enter a name for the new segment. The name can include spaces.

**Description:** Enter some descriptive text to help identify the new segment.

**Profile Type:** Select the profile type that corresponds to the users you want to belong to the segment (assuming they meet the additional criteria you define). The options that appear are the item descriptor types in the profile definition file being used by your system, including any sub-types of those items.

The example shown in the previous section assumes your profile definition includes a base type, User, with two sub-types, Investor and Broker. Using the example, if you wanted all site visitors to be able to qualify for a segment called New Members, you would specify the base type of profile, User. For a segment called High Earners that you knew would apply exclusively to visitors who were investors, you could specify the sub-type Investor as the profile type for that segment. By constraining the potential membership of a segment to a specific sub-type of profile, you can minimize the number of profiles that the system must change as a result of creating the segment.

Note that you cannot edit the profile type after you have clicked the Create button to create the segment. Switching to the Rules tab also makes these settings permanent for this segment.

6. By default, segments are stored as files with the extension . properties in /atg/registry/RepositoryGroups. To change the folder in which the new segment is stored, click Select Parent and specify the new folder.

**Note:** If you need to change the location after the segment has been created, use the Move icon.

7. When you have completed the fields in the General tab, click Create. The new segment is added to the project as an asset.



8. Click Rules to display the Rules tab, and then follow the procedure in the next section, [Defining User Segment Rules](#).

## Defining User Segment Rules

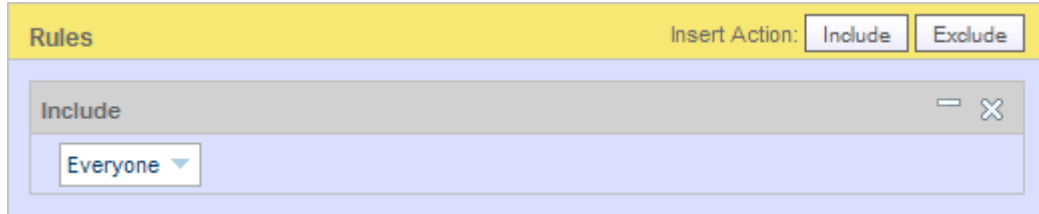
As part of the process of creating a segment, you need to set up the rules that define the user profiles that will be included in the group.

**Note:** The configuration for the basic definition of the users in a user segment is the same in an unregistered site or a multisite environment. However, in a multisite environment, the user interface displays extensions to the rule configuration. For information about how to use the rule extensions in a multisite environment, see [Multisite Targeting Rules](#).

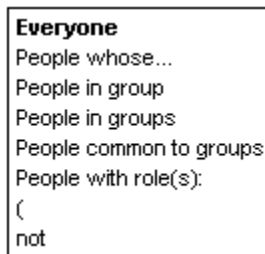
To define the users in a user segment:

1. Display the Rules tab for the user segment.
2. Click Include or Exclude in the Rules title bar.
  - Use Include to define the segment by the profiles you want to include.
  - Use Exclude to define the segment by the profiles you want to exclude.

The beginning of the new rule appears in the Rules panel:



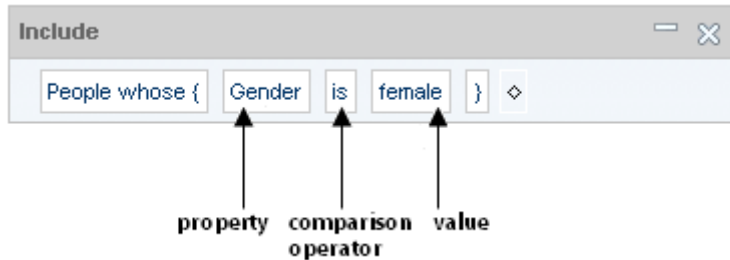
3. Specify the profiles you want to include or exclude. To do so, click the default choice, Everyone. The following options appear:



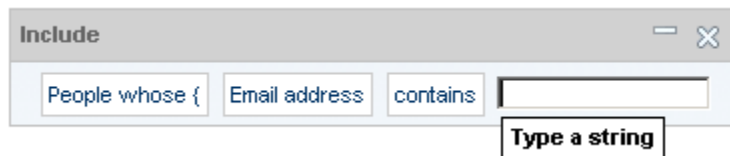
- Select **Everyone** if you want to include or exclude all profiles stored in the profile repository.



- Select **People whose...** if you want to include or exclude users based on specific properties in the profile repository used by your environment. When you select this option, several fields appear, allowing you to select the property, comparison operator, and value you want to use.



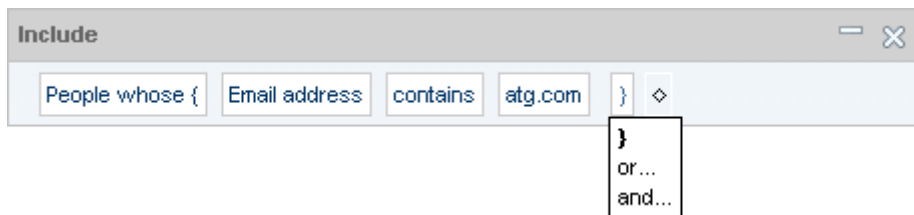
The selections in the Comparison Operator and Value drop-down lists change depending on the property you select. If the property has a limited set of values, the Value list includes all of your possible choices. If the property has an unlimited number of values, you can type a unique value directly into the list as shown below. An instruction showing the value type required appears below the text field.



You can further qualify this condition with more criteria, for example:

People whose email address contains atg.com and telephone number starts with 617.

To do so, click the second bracket and select "or" or "and," as shown:



You can then enter additional criteria. Note the difference between adding more criteria here and adding them by clicking the diamond at the end of the phrase. If you add another "and" condition by clicking the diamond, you create an expression that represents the union of two sets:



People whose email address contains atg.com **and** people whose telephone number starts with 617.

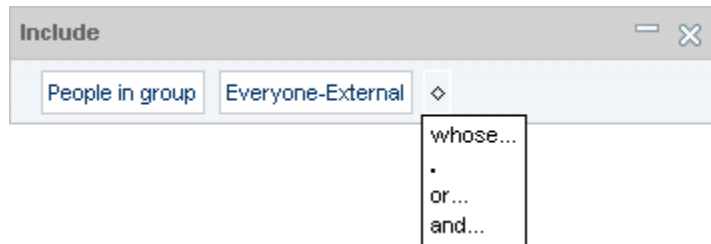
- Click **People in Group(s)** if you want to include or exclude profiles from an existing segment. Then select the segment you want to add. Note that the segment must have a base version in the versioning system to appear as an option (in other words, it must have been created in another project and approved for deployment).

If multiple segments exist and you want to specify more than one, click the bracket symbol after the first segment you entered, and select the comma option:



You can then specify another group. Repeat as many times as needed.

You can also add other criteria to further qualify this statement (for example, People in Group Brokers whose Registration Date is Before June 1, 2004. To do so, click the element at the end of the phrase, as shown, and select Whose:



Follow the instructions for the People Whose... option above.

- Select **People Common to Groups** to specify any profiles that appear in multiple segments; enter the segments to use as the criteria. Again, click the bracket and select the comma option to enter multiple segments.
- Select **People with Role(s)** if you want to include or exclude users who have been assigned specific global or organizational roles. When you click the role field, the Select dialog appears, which you can use to choose the roles you want. See [Using the Asset Picker to Select Items](#) for more information.

You can add other criteria to further qualify this statement. To do so, click the diamond at the end of the phrase and select Whose. Follow the instructions for the People Whose... option above.



4. If you want to add other condition statements to the rule, click the period at the end of the expression and select "And" or "Or."
5. When you have finished defining the rule, click Save (or Create).
6. Follow the steps outlined in [Project Basics](#) to mark the Author task as complete and advance the project to the next task, usually Approval. When all tasks are complete, the project can be deployed, and the new segment will be available on the live site.

## Deleting User Segments

To delete a user segment, select the checkbox for the segment and click the Delete icon. If you delete a folder containing a segment, and the following error message occurs, refer to [Deleting Segment or Content Group Folders](#) for information.

Error: Cannot delete the folder because it has contents which may not be displayed in the current view.





## 5 Content Groups

The Content Groups window lets you create and define content groups—collections of content items that share common properties—for easier targeting. For example, you could create a content group called NewNYInfo that includes special content items for new site members who live in New York. The rules that define this group might look like this:

```
Include this content:  
  items whose TargetAudience is NewUsers  
  and whose keywords includes New York
```

You can then use the Content Targeters window to set up the business rules for delivering this content to its intended audience. For example:

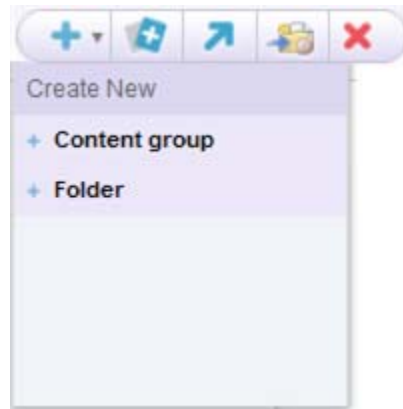
```
Show this content:  
  items in group NewNYInfo  
to these people:  
  people whose Registration date is after 03/31/2004
```

Whenever you create a content group, the system assigns a new property with the same name as the content group to every content item in the repository. It sets that property to “true” or “false” according to whether the content item matches the group definition. For example, if you create a content group called NewNYInfo, the system gives every content item a new property called NewNYInfo. If an item fits the criteria for that group, the system sets the NewNYInfo property for that content to “true.” If an item does not fit the group criteria, the NewNYInfo property is set to “false.” The system uses this method to determine which items belong to each group.

### Creating a Content Group

Follow the procedures in this section to create a content group.

1. From the BCC Home page, select Personalization > Targeting and Segmentation.
2. Specify a name and an optional description for the project that will manage the creation and versioning of the new content group.
3. Select Content Groups from the Show list.
4. Click the Create New... icon and select Create New > Content Group. **SHOT IS OK**



5. Complete the fields in the General tab as follows.

**Name:** Enter a name for the new group. The name can include spaces.

**Description:** Enter some descriptive text to help identify the new group.

**Content Source:** Select a repository from the Content Source drop-down list. The repository you select determines the content items, content type, and content properties that you can select for inclusion in this group when you define its rules (see the next section). The group can include only items in this repository.

**Content Type:** Select the type of content you want to be able to include. The type corresponds to the subset of items defined for the item descriptor type in the content repository definition file. Each item type has its own properties. For more information, refer to the [ATG Repository Guide](#).

Note that you cannot edit these settings after you have clicked the Create button to create the content group. Switching to the Rules tab also makes these settings permanent for this content group.

6. By default, content groups are stored as files with the extension `.properties` in `/atg/registry/RepositoryGroups`. To change the folder where the new segment is stored, click Select Parent and specify the new folder.

**Note:** If you need to change the location after the content group has been created, use the Move icon.

7. When you have completed the fields in the General tab, click Create. The new content group appears in the Browse tab, and it is added to the project as an asset.
8. Click Rules to display the Rules tab, and then follow the procedure in the next section, [Defining Content Group Rules](#).

Note that it is possible to continue to the Rules tab without clicking the Create button first; however, doing so means that the changes you have made so far are not saved, and the content group will be lost if your session ends or if you navigate to a different part of the UI. If you select Create, the new group is preserved, and you can continue the process of defining it at any time.



## Defining Content Group Rules

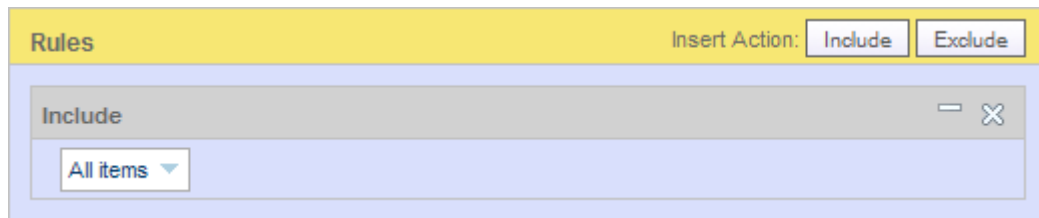
Each time you add a new content group, you need to set up the rules that define the content that will be included in the group.

**Note:** The configuration for the basic definition of the contents in a content group is the same in an unregistered site or a multisite environment. However, in a multisite environment, multisite rule extensions are displayed. For information about how to use the rule extensions in a multisite environment, see [Multisite Targeting Rules](#).

To define the content in a content group:

1. Display the Rules tab for the content group
2. Click Include or Exclude in the Rules title bar.
  - Use Include to define the content group by the content you want to include.
  - Use Exclude to define the content group by the content you want to exclude.

The beginning of the new rule appears in the Rules panel:



3. Specify the content you want to include or exclude. To do so, click the default choice, All Items. The following options appear:



4. Specify the content you want to show or hide:
  - Click **All Items** if you want to include or exclude all content items stored in the selected repository.
  - Click **Items in Group(s)** if you want to include or exclude items from other existing content groups. Then select the group you want to add. Bear in mind that the only groups that can appear as options are those whose content source



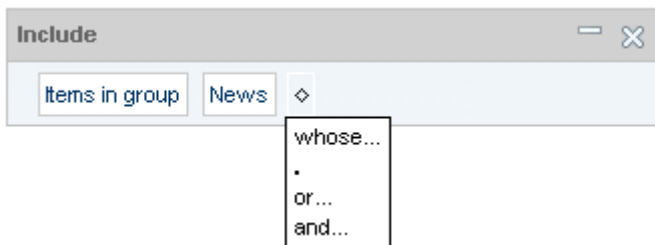
and type match the content source and type you specified in the General tab for this group. Note also that a content group must have a base version in the versioning system for it to appear here, which means it must have been added to another project and checked in (but not necessarily deployed). For more information on how and when an asset is checked in, refer to the [ATG Content Administration Guide for Business Users](#).

If multiple groups exist and you want to specify more than one, click the bracket symbol after the first group you entered, and select the comma option:



You can then specify another group. Repeat as many times as needed.

You can also add other criteria to further qualify this statement (for example, Items in Group News whose Last Modified Date is after June 3, 2006. ). To do so, click the diamond at the end of the phrase, as shown, and select Whose:



Follow the instructions for the Items Whose... option below.

- Click **Items Common to Groups** to specify any items that appear in multiple groups; enter the groups to use as the criteria. Again, click the bracket and select the comma option to enter multiple groups.
- Click **Items in Folder(s)** if you want to include or exclude all items from specific repository folders. The asset picker appears; use it to specify the folders you want. For more information, see [Using the Asset Picker to Select Items](#).

As before, you can add other criteria to further qualify this statement by clicking the period at the end of the phrase and selecting Whose...

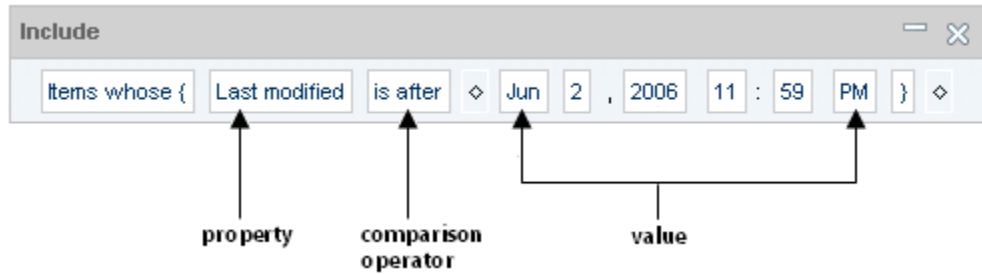
Follow the instructions for the Items Whose... option below.

- Click **These Item(s)** if you want to include or exclude specific content items. Use the asset picker to select the individual content items you want to specify.

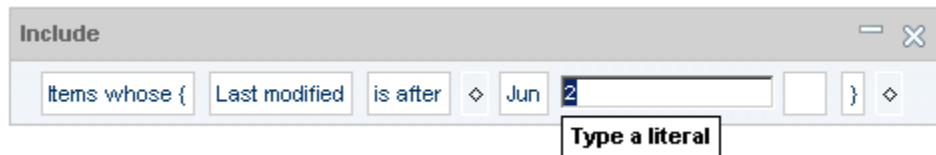


You can define additional criteria by selecting the Whose option.

- Click **Items Whose...** if you want to include or exclude items based on specific content properties. When you select this option, several fields appear, allowing you to select the property, comparison operator, and value you want to use.



The properties that are available for selection depend on the repository you are working with. The selections in the Comparison Operator and Value drop-down lists change depending on the property you select. If the property has a limited set of values, the Value list will include all of your possible choices. If the property has an unlimited number of values, you can type a unique value directly into the list as shown below. An instruction showing the value type required appears below the text field.



5. If you want to add other condition statements to the rule, click the element at the end of the expression and select "and" or "or."
6. If you want to make the group definition even more specific, click Include or Exclude again to create a rule set within the definition, and then repeat the steps above.
7. Click Create when you have finished defining the rule.
8. Follow the steps outlined in [Project Basics](#) to mark the Author task as complete and advance the project to the next task, usually Approval. When all tasks are complete, the project can be deployed, and the new targeter will be available on the live site.

## Deleting Content Groups

To delete a content group, select the checkbox for the group and click the Delete icon. If you delete a folder containing a content group, and the following error message occurs, refer to [Deleting Segment or Content Group Folders](#) for information.



Error: Cannot delete the folder because it has contents which may not be displayed in the current view.



## 6 Content Targeters

After you set up user segments and content groups, you tell the system which content groups to show to whom and under which circumstances. You can do this by setting up content targeters, which are business rules that you create through the Targeting and Segmentation option in the ATG Business Control Center. Content targeters define the content that you display to each user segment.

A content targeter can contain two kinds of business rules: **show** and **hide**. Each rule type is made up of specific conditions related to content, people, time, and environmental factors and generally reads as follows: *Show/Hide this content... to/from these people... at these times... under these conditions*. For example, suppose you wanted to show new feature articles (in a content group called `newMemberFeatures`) to registered site users (in a user segment called `registeredMembers`) every Monday. In this case, you could create a targeter called `newFeatures` with the following rule:

```
Show this content:
  items in group newMemberFeatures
to these people:
  people in group registeredMembers
at these times:
  every Monday of every month
```

When this targeter is invoked, it initially looks at all conditions *except* the content conditions. First, it checks to see if the `registeredMembers` property in the user's profile is set to "true" (the people condition). If this or any other condition fails, the targeter completely ignores the rule. If the condition passes, it goes on to see if the current day is Monday (the time condition). If all of these conditions pass, the targeter looks at the content condition to determine the items to show or hide. In this case, it shows the user all items in the `newMemberFeatures` content group.

After you create a targeter, a page developer uses a targeting servlet bean to embed it in the appropriate site pages so that it will display the specified content to visitors who meet your targeting conditions. (Typically, page developers use the Document Editor window in the ATG Control Center to embed targeters in JHTML or JSP (JavaServer Page) files. For more information, see the [ATG Page Developer's Guide](#).)

**Note:** Multiple targeters can be used to produce a single Web page. For example, nine separate targeters are invoked to produce the "investor" home page (`investorhome.jsp`) in the Quincy Funds demo.

### **Using Scenarios to Match Content to Users**

If you use the Scenarios module, you can match content to user segments in two ways: you can either create targeters (as described above), or you can use scenarios to achieve essentially the same results. The method you choose depends on whether you require the advanced features that scenarios provide, or

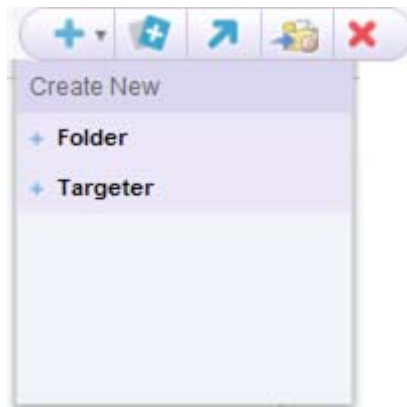


whether the slightly simpler features of targeters meet your requirements. You can also set up a combination of the two methods. Note, however, that you create scenarios through the ACC, not through the ATG Business Control Center. For more information, see the [ATG Personalization Guide for Business Users](#).

## Creating Targeters

This section describes how to create a content targeter that you can use to display appropriate content to specific users.

1. From the BCC Home page, select Personalization > Targeting and Segmentation.
2. Specify a name and an optional description for the project that will manage the creation and versioning of the new targeter.
3. Select Targeters from the Show list.
4. Click the Create New... icon and select Create New > Targeter.



5. Complete the fields in the General tab as follows.

**Name:** Enter a name for the new targeter. The name can include spaces.

**Description:** Enter some descriptive text to help identify the new targeter.

**Content Source:** Select a repository from the Content Source drop-down list. The repository you select determines the content items, content type, and content properties you can target against. The targeter will apply only to items in this repository.

**Content Type:** Select the type of content you want to target against. The type corresponds to the subset of items defined for the item descriptor type in the content repository definition file. Each item type has its own properties. For more information, refer to the [ATG Repository Guide](#).





**Profile Type:** Select the type of users to whom this targeter can apply. The options that appear are the item descriptor types in the profile definition file being used by your system, including any sub-types of those items.

Note that you cannot edit these settings after you have clicked the Create button to create the targeter. Switching to the Rules tab also makes these settings permanent for this targeter.

6. By default, targeters are stored as files with the extension `.properties` in `/atg/registry/RepositoryTargeters`. To change the folder where the new targeter is stored, click Select Parent and specify the new folder.

**Note:** If you need to change the location after the targeter has been created, use the Move icon.

7. When you have completed the fields in the General tab, click Create. The new targeter appears in the Browse tab, and it is added to the project as an asset.
8. Click Rules to display the Rules tab, and then follow the procedure in the next section, [Defining Targeter Rules](#).

Note that it is possible to continue to the Rules tab without clicking the Create button first; however, doing so means that the changes you have made so far are not saved, and the targeter will be lost if your session ends or if you navigate to a different part of the UI. If you select Create, the new targeter is preserved, and you can continue the process of defining it at any time.

## Defining Targeter Rules

Each time you add a new content targeter, you need to set up the business rules for delivering the selected content to its target audience. For example, you could create a rule that shows content from a folder called Weekend Features to all users every Friday.

**A word about targeters and site performance:** The ATG Personalization module *caches* (or temporarily stores) the content that it displays after each targeting operation. This behavior allows it to serve the content much faster to the next visitor who matches the targeting criteria. This caching mechanism will not be effective if your targeting rules include profile or request properties (time of day, for example) that have many possible values for each visitor. For example, if you create a targeter that includes a multi-value property called `interests`, and there are many possible value combinations for each visitor ("skiing, golf, hockey," "biking, golf," "soccer, tennis, swimming,"), it is unlikely that the Personalization module would be able to use the page results cached from previous requests, and the targeting operation would take longer.

**Note:** The configuration for the basic definition of the targeter is the same in an unregistered site or a multisite environment. However, in a multisite environment, multisite rule extensions are displayed. For information about how to use the rule extensions in a multisite environment, see [Multisite Targeting Rules](#).

To set up or edit the business rules for a content targeter:

1. Display the Rules tab for the targeter.



2. Click Show or Hide at the top of the Rule Set panel.
  - Show lets you specify the content you want visitors to see.
  - Hide lets you lets you specify the content you don't want visitors to see.

**Note:** Show rules are evaluated before hide rules.

A rule with default values appears in the Rule Set panel. For example, if you click Show, you see the following fields:

Rule Set	
Insert Action: Show Hide	
Show	
<b>This Content</b>	All items
<b>To These People</b>	Everyone
<b>At These Times</b>	Always
<b>Under These Conditions</b>	Always

3. Use these shown to set the rule's content, people, time, and environment conditions. See the following sections for the procedures:
  - [Setting Content Conditions](#)
  - [Setting People Conditions](#)
  - [Setting Date and Time Conditions](#)
  - [Setting Environment Conditions](#)
4. To add another "Show" section to the same rule, click the Show button and complete the form.
5. To add another rule set, select Add Rule Set (not shown in the image above), and repeat steps 2-4. For more information on creating multiple rule sets, see the [Creating and Prioritizing Multiple Rule Sets](#) section.
6. When you have finished setting up your targeting rules, click Save (or Create).
7. Follow the steps outlined in [Project Basics](#) to mark the Author task as complete and advance the project to the next task, usually Approval. When all tasks are complete, the project can be deployed, and the new targeter will be available on the live site.

For information on embedding the targeter in the appropriate site pages, see the [ATG Page Developer's Guide](#).



## Setting Content Conditions

Content conditions are used to find content items that match some sort of criteria. For example:

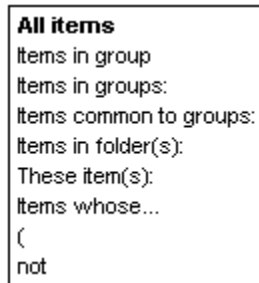
Show this content:  
 items whose keywords includes Hi ki ng

You can combine multiple content conditions by using AND statements and OR statements.

If your product suite includes ATG Commerce, the content you can show includes any promotions you have set up. For more information, on promotions, refer to the ATG Commerce documentation.

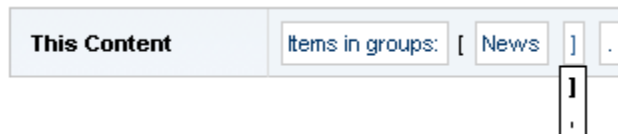
To set a rule's content conditions:

1. Click in the This Content field in the Rule Set panel. The following options appear:



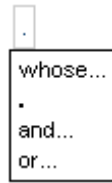
2. Specify the content you want to show or hide:
  - Click **All Items** if you want to show (or hide) all content items stored in the selected repository.
  - Click **Items in Group(s)** if you want to show or hide items from specific content groups created in the Content Groups window. Then select the group you want to add. Bear in mind that the only groups that appear as options are those whose content source and type match the content source and type you specified in the General tab for this targeter.

If multiple groups exist and you want to specify more than one, click the bracket symbol after the first group you enter and select the comma option:



You can then specify another group. Repeat as many times as needed.

You can also add other criteria to further qualify this statement (for example, Items in Group Book Reviews whose Author is Smith). To do so, click the period at the end of the phrase, as shown, and select Whose:



Follow the instructions for the Items Whose... option below.

- Click **Items Common to Groups** to specify any items that appear in multiple groups; enter the groups to use as the criteria. Again, click the bracket and select the comma option to enter multiple groups.
- Click **Items in Folder(s)** if you want to show or hide all items from specific repository folders. The asset picker appears; use it to specify the folders you want. For more information, see [Using the Asset Picker to Select Items](#).

As before, you can add other criteria to further qualify this statement by clicking the period at the end of the phrase and selecting Whose...

Follow the instructions for the Items Whose... option below.

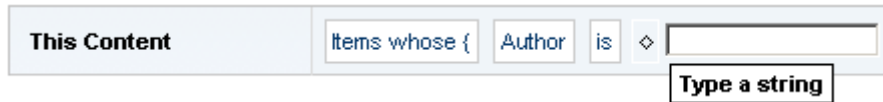
- Click **These Item(s)** if you want to show or hide specific content items. Use the asset picker to select the individual content items you want to include.

You can define additional criteria by selecting the Whose option (described below).

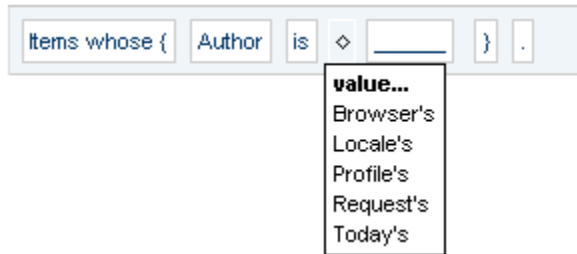
- Click **Items Whose...** if you want to show or hide items based on specific content properties. When you select this option, several fields appear, allowing you to select the property, comparison operator, and value you want to use.



The properties that are available for selection depend on the repository you are working with. The selections in the Comparison Operator and Value drop-down lists change depending on the property you select. If the property has a limited set of values, the Value list will include all of your possible choices. If the property has an unlimited number of values, you can type a unique value directly into the list as shown below. An instruction showing the value type required ("Type a string," for example) appears below the text field.



In addition to any preset content property values, or any values you might type yourself, you can also use the value list to specify the environment options described in the following table. To display these, click the diamond icon, as shown:



You can use these options to set the value of your selected content property by testing it against a particular environment condition.

<b>Browser's</b>	Select Browser's to add a browser-related property to the definition. For example, <i>...items whose absolutePath is Browser's request.remoteHost.</i>
<b>Locale's</b>	Select Locale's to add a locale-related property. For example, <i>...items whose language is Locale's acceptLanguage.</i>  <b>Note:</b> Locale properties are relevant if you are working on a <i>localized</i> Web site that displays content in different languages depending on the language setting in a visitor's browser. For more information about internationalization and localization, see the <a href="#">ATG Programming Guide</a> .
<b>Profile's</b>	Select Profile's to add another user-related property. For example, <i>...items whose keywords includes Person's Actual Investment Goal.</i>
<b>Request's</b>	Select Request's to add a property related to the HTTP request. For example, <i>...items whose relativePath is Request's requestURI.</i>
<b>Today's</b>	Select Today's to add a time-related property. For example, <i>...items whose lastModified is Today's date.</i>

The application developers working on your Web site can add other options to this list by setting up a TargetingSourceMap service in the Personalization module. For more information, see [Setting Up Targeting Services](#) in the [ATG Personalization Programming Guide](#).

When you select one of these options, the ATG Business Control Center displays another field that contains a drop-down list, prompting you to select a related



property. The properties that are available depend on the option you select from the Value list.

3. If you want to add other content conditions, click the period at the end of the phrase, as shown, and then select "And" or "Or" as appropriate:



4. Next, you need to specify your target audience. See the following section, [Setting People Conditions](#), for details.

### Setting People Conditions

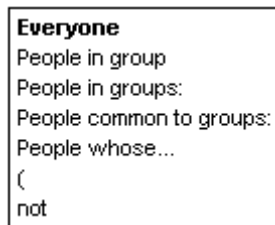
People conditions are tested against user profile properties to see if the rule should be applied. For example:

```
Show this content:
  items in group NewYinfo
to these people:
  people whose Registration date is after 03/31/2004
```

You can combine multiple people conditions by using **AND** statements and **OR** statements.

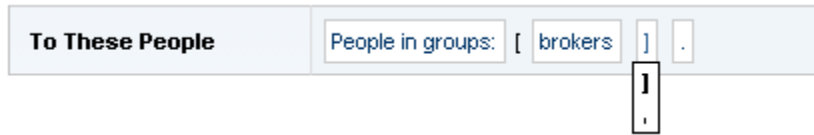
To set a rule's people conditions:

1. Click in the To These People field in the Rule Set panel. The following options appear:



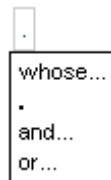
2. Specify the people you want to include in (or exclude from) your target audience:
  - Click Everyone if you want to include (or exclude) all users.
  - Click People in Group(s) if you want to include or exclude people from specific user segments. Then select Choose a Group to display a list of the user segments in your system.

If multiple segments exist, and you want to specify more than one, click the bracket symbol after the first segment you enter and select the comma option:



You can then specify another segment. Repeat as many times as needed.

You can also add other criteria to further qualify this statement (for example, People in Group Members whose Registration Date is before Jan 1, 2000). To do so, click the period at the end of the phrase, as shown, and select Whose:



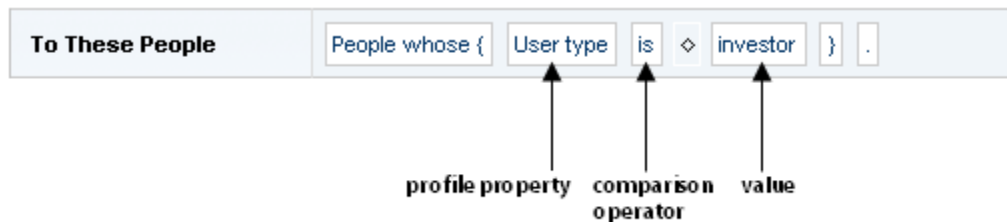
Then follow the instructions for People Whose... below.

- Click **People Common to Groups** to specify any users who qualify for multiple segments; enter the segments to use as the criteria. Again, click the bracket and select the comma option to enter multiple segments.

You can also add other criteria to further qualify this statement. To do so, click the period at the end of the phrase, as shown above, and select Whose.

**Note:** The criteria after Whose... in this case qualify the people, not the segments, for example People Common to Groups New Members and West Coast Users whose Date of Birth is Today.

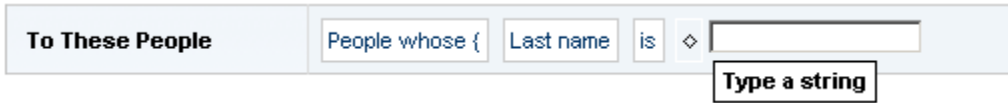
- Click **People Whose...** if you want to include or exclude people based on specific profile properties. When you select this option, several fields appear as shown below, allowing you to select the profile property, comparison operator and value you want to use to define the group.



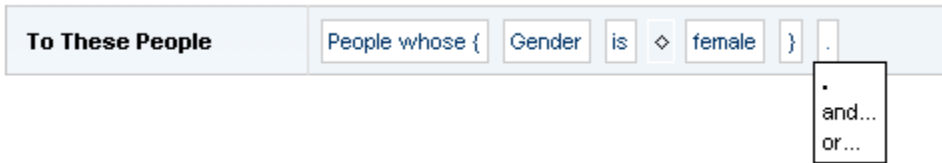
The properties that are available for selection are drawn from the profile repository created for your ATG environment. (For more information, refer to *Setting Up a Profile Repository* in the [ATG Personalization Programming Guide](#).) The selections in the Comparison Operator and Value fields change depending



on the profile property you select. If the property has a limited set of values, the Value list will include all of your possible choices. If the property has an unlimited number of values, you can type a unique value directly into the field. An instruction showing the value type required ("Type a string," for example) appears below the text field, as shown below:



3. If you want to add other people conditions, click the period at the end of the phrase, as shown, and then select "And" or "Or" as appropriate:



Next you set the time conditions for displaying the content. See the following section, [Setting Date and Time Conditions](#), for details.

### Setting Date and Time Conditions

Date and time conditions are tested against the current time to see if the rule should be applied. For example:

```
Show this content:
  items in group newMemberFeatures
To these people:
  people in group NewMembers
At these times:
  every Mon, Wed, Fri between 9:00am and 9:00pm
  between 01-Jan-2007, 12:00am and 31-Jan-2007, 11:59pm
```

To set a rule's date and time conditions:

1. Click in the At These Times field in the Rule Set panel. The following options appear:



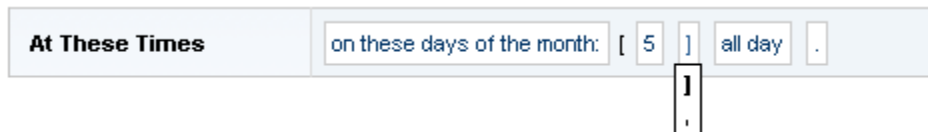


- Always**  
on  
between  
after  
before  
every  
the first  
the second  
the third  
the fourth  
the last  
on these days of the month:  
(  
not

2. Set the time conditions you want to use.

- Click **Always** to display the content whenever the user displays the page.
- Click **On** to show or hide content on a specific date. For example, On Dec 19, 2006. You can then choose whether the content is displayed all day or between specific times on that day.
- Click **Between** to show or hide content between specific dates.
- Click **After** to show or hide content starting on a specific date (without an end date). For example, after Dec 19, 2006, 12: 00: 00 AM.
- Click **Before** to show or hide content beginning immediately up until a specific date. For example, before Dec 18, 2006, 11: 59: 00 PM.
- Click **Every** to show or hide content on certain days of each month. For example, Every Monday of Every Month between 9 AM and 12 PM.
- Click **The First, The Second, The Third, The Fourth, or The Last** to show or hide content on certain weekdays every month. For example, The Last Tuesday of Every Month between 9: 00am and 11: 59pm.
- Click **On These Days of the Month** to show or hide content on the same dates each month. For example, On These Days of the Month: 5, 10, 15, 20, 25.

If you want to specify more than one date, click the bracket after the first date and select the comma option, as shown below:



You can then use the field that appears to specify an additional date. Repeat as needed.



Next, you can set other environment conditions for the rule. See the following section, [Setting Environment Conditions](#), for more information.

### Setting Environment Conditions

Environment conditions cover properties that are not necessarily related to the user's profile or the current time. For example, the type of Web browser a visitor is using might not be included in his or her profile, but that information is available when the visitor accesses the site and it can be used for targeting then. For example:

```
Show this content:
  items whose platform is Macintosh
Under these conditions:
  if Browser's using Macintosh system is true
```

To set a rule's environment conditions:

1. Click in the Under These Conditions field in the Rule Set panel. The following options appear:



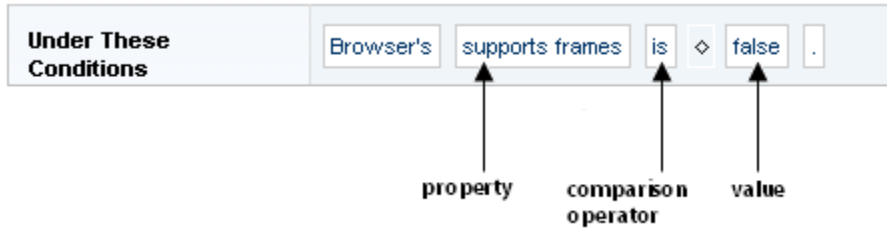
2. Use the options as described below.



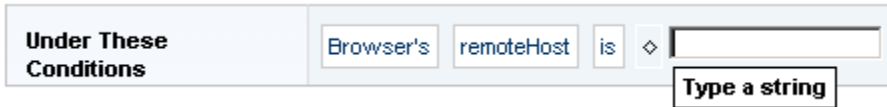
<b>Browser's</b>	Select Browser's to set a browser-related condition. For example: Browser's supports cookies is true.
<b>Locale's</b>	Select Locale's to set a locale-related condition. For example, if Locale's defaultRequestLocale is en_US.  <b>Note:</b> Locale options are relevant if you are working on a localized Web site that displays content in different languages depending on the language setting in a visitor's browser. For more information about internationalization and localization, refer to the <a href="#">ATG Programming Guide</a> .
<b>Profile's</b>	Select Profile's to set a person-related condition. For example, if Profile's Home address's State is NY.
<b>Request's</b>	Select <b>Request's</b> to set an HTTP request-related condition. For example, if Request's logginInfo is false.  <b>Developer's Note:</b> The ATG Business Control Center does not display form parameters in the drop-down list of Request properties. If you want to include form request parameters in your targeting business rules, you can work around this by creating a request-scoped Form Handler object and adding it to the TargetingSourceMap service in the Personalization module. (For more information on setting up a TargetingSourceMap service, see <i>Setting Up Targeting Services</i> in the <a href="#">ATG Personalization Programming Guide</a> .) After your new Form Handler is in the TargetingSourceMap, all the object's properties should appear in a drop-down list of Form Handler properties in the ATG Business Control Center. You can then select them for your targeting business rules.
<b>Today's</b>	Select Today's to set a time-related condition. For example, if Today's date is 10/20/2006.

The application developers working on your Web site can add other environment options to this list by setting up a TargetingSourceMap service in the Personalization module. For more information, see *Setting Up Targeting Services* in the [ATG Personalization Programming Guide](#).

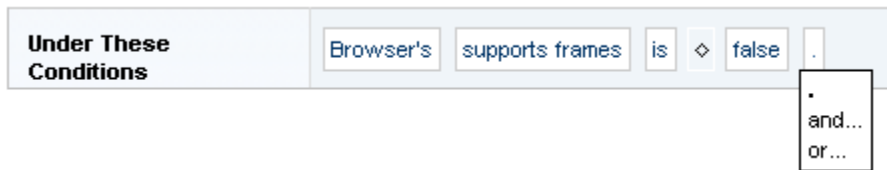
When you select one of these options, the ATG Business Control Center displays additional fields (illustrated below), allowing you to select the property, comparison operator, and value you want to use.



The selections in the Comparison Operator and Value drop-down lists change depending on the property you select. If the property has a limited set of values, the Value list will include all your possible choices. If the property has an unlimited number of values, you can type a unique value directly into the field. An instruction showing the value type required ("Type a string," for example) appears below the text field:



3. If you want to add other environment conditions, click the period at the end of the phrase, as shown, and then select "And" or "Or" as appropriate:



## Creating and Prioritizing Multiple Rule Sets

Business rules are evaluated sequentially as they appear in the Rules tab in the content targeter window. Inserting breaks between rules creates different sets of rules. When rules are grouped in sets, you can move them up or down to change the order in which they are evaluated. You can also use multiple rule sets to display default content in the event that certain rule conditions fail.

For example, the following targeter includes three rule sets:

```
Show this content:
  items whose Target Audience includes Person's Strategy
  and whose Language starts with Local e's Local eString
to these people:
  people whose User type is investor
```



-----If no items were selected, try the following rules-----  
 Show this content:  
     items whose Target Audience includes guests  
     and whose Language starts with Locale's LocaleString  
 to these people:  
     people whose User type is guest  
 -----If no items were selected, try the following rules-----  
 Show this content:  
     items whose Target Audience includes anybody  
     and whose Language starts with Locale's LocaleString  
 to everyone

If the first set produces no results, the system uses the Show rule in the second set. If the second set produces no results either, the system uses the Show rule in the third set.

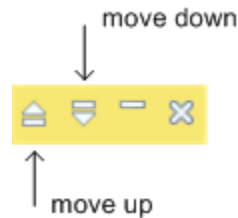
**Note:** You must organize your rules into rule sets as you create the rules; you cannot break rules into sets later.

To create a rule set:

1. Click the Add Rule Set button at the bottom of the Rules tab. The following rule break appears at the bottom of the rule list:

-----If no content was selected, try the following rules-----

2. Set up the rules for the new rule set. (See [Defining Targeter Rules](#) for details.) You can move the rule set by clicking the Move Up or Move Down icons in the Rule Set title bar:







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