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Personalization Guide for
Business Users

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USA

ATG Personalization Guide for Business Users

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1 Introduction

This manual is designed for people whose job responsibilities include a range of planning activities that define the business strategies for their Web site. It describes how to use the ATG platform to perform typical tasks such as segmenting site visitors into target groups, deciding what Web site content to display to whom, and creating promotional campaigns. It also describes how to create business reports that can be used to analyze site and customer data.

This manual provides the following:

- A high-level description of the products that make up the ATG platform and how you can use them to create a personalized Web site. The ATG product suite is a highly flexible system with many powerful features; this manual may give you some ideas for enhancing your Web site (for example, did you know that you can use ATG products to test your site's design on a sample audience?).
- Information on who does what in the process of designing and maintaining a Web site. Specifically, the manual shows what you do in relation to what the application developer or the page developer does. This information not only helps you identify and understand your own tasks but helps you discuss your plans with other team members.
- Detailed procedures and examples that show you how to perform each task.

Parts of the ATG Platform

The ATG platform is composed of the following pieces: the Dynamo Application Framework, the ATG Personalization module, and the ATG Scenarios module, which are described below. The platform runs on a variety of Web application servers, specifically Oracle WebLogic Server, IBM WebSphere, and JBoss.

Dynamo Application Framework

The Dynamo Application Framework provides the foundation layer of code necessary for running the ATG platform on the application server your company uses. At its core is Nucleus, a framework of predefined Java components and services that your application developers can customize and use as the basis for building a Web site. There are no business user tasks that require you to interact directly with the Dynamo Application Framework. For more information about it, refer to the [ATG Programming Guide](#).



ATG Personalization Module

The Personalization module provides features that are specifically designed to support Web site personalization, which is the process of displaying different content to each site visitor depending on his or her preferences and requirements. In order to create and maintain a personalized Web site, you must make a series of decisions about your site visitors and the content you want to show them; for example, how do you want to segment your site visitors? Do you want to show specific content to different age groups? Do you plan to use a site visitor's income bracket to determine what to show her? And what content, specifically, do you want to show to each group of people?

Once you have planned your approach to the relationship between site visitors and content, you use the ATG Control Center to do the following:

- Create profile groups
- Group similar content items together
- Match content groups to profile groups
- Determine the visitor behavior that you will track and use to update profiles

For an overview of these tasks, see [Overview: Creating a Personalized Web Site](#).

ATG Scenarios Module

The Scenarios module extends the functionality of the Personalization module, providing a set of advanced targeting features that companies can use to plan and manage long term personalization and customer relationships. Principally, you can use the Scenarios module to do the following:

- Create scenarios, which are event-driven campaigns designed to manage interactions between site visitors and content over a long period of time.
- Analyze Web site and visitor data through powerful reporting features, and then use that data to refine the content that you show your visitors.

As a business user, therefore, your tasks with the Scenarios module include the following:

- Planning, creating, and maintaining scenarios
- Creating Web site reports and analyzing results

About the Quincy Funds Demo Application

When you install the ATG platform, you have the additional option of installing the Quincy Funds demo. This application is a demonstration Web site for the Scenarios module that shows how you can use ATG products to manage visitor profiles and deliver personalized content to site visitors. You log into the site as a visitor, and then you can see both your visitor profile and the site content change as a result of choices you make as you move from page to page.

To understand personalization and the part that scenarios play in personalizing Web content, it is highly recommended that you take a look at the Quincy Funds demo and read its accompanying manual, the [ATG Quincy Funds Demo Documentation](#).



ATG Control Center

The ATG Control Center is the point-and-click user interface that gives you access to all features of the ATG platform. Business users carry out all their ATG platform tasks within the ATG Control Center.

One copy of the ATG Control Center is installed automatically with the ATG platform. However, you can install and run as many copies of the ATG Control Center as you require – for example, if your company has three business managers who perform ATG-related tasks, they can each install the ATG Control Center on their own machines and connect to the same ATG server. For more information on installing additional copies of the ATG Control Center, please see the [ATG Installation and Configuration Guide](#).

Important: If your ATG product environment uses ATG Content Administration, you use the browser-based **ATG Business Control Center**, rather than the ATG Control Center, to perform many of the tasks described in this guide, including setting up content targeting and managing user profiles, organizations, and roles.

The table below shows the recommended interface for working with each of the items listed if your ATG environment uses ATG Content Administration.

Item	Manage in ATG Control Center (ACC)?	Manage in ATG Business Control Center (BCC)?
User profiles, roles, and organizations	Possible	Recommended
Profile groups	Possible	Recommended (in the BCC, user segments have superseded profile groups)
Content items	Possible	Possible using the ATG Content Administration interface. Refer to the ATG Content Administration Guide for Business Users for information.
Content targeters	Possible	Recommended
Content groups	Possible	Recommended
Scenarios and slots	Required – scenarios exist only in the ACC	Not possible
Workflows	Required – workflows exist only in the ACC	Not possible

Important: If you have a multisite ATG environment, where your ATG products are being used to support more than one customer-facing Web site, you are required to use the ATG Business Control Center to manage all items shown above except scenarios, slots, and workflows. In a multisite configuration, these items have additional features that are available only in the BCC.



The ATG Business Control Center is described in the [ATG Business Control Center Administration and Development Guide](#) and the [ATG Business Control Center User's Guide](#).

Additional Products

ATG provides additional products that run on top of the ATG platform. Typically these must be purchased separately. These products include ATG Content Administration, ATG Commerce (Business and Consumer), and ATG Merchandising. Please refer to the separate documentation for these products for information on the business tasks associated with them.

Starting the ATG Control Center

The following procedure describes how to start an ATG Control Center that is installed in a Windows environment on the same machine as the ATG server. For information on starting an ATG Control Center that is installed on a different machine, or for information on starting the ATG Control Center in a UNIX environment, refer to the [ATG Installation and Configuration Guide](#).

Typical ATG installations use both a production server and a staging server. The production server is the machine that serves the “live” Web site that your visitors can see. The staging server, by contrast, serves an internal version of the Web site for in-house testing purposes. The staging site is not accessible to outside visitors.

In most cases, you should connect to the staging server when you do any work in the ATG Control Center. After you test your changes on the staging site, you (or your ATG system administrator) can copy your changes to the live site on the production server. If you have questions about which server to connect to, check with your system administrator. (For more information on copying your changes to the production server, see *Copying and Switching Databases* in the [ATG Installation and Configuration Guide](#).)

Before you start the ATG Control Center:

1. Make sure the SOLID Server database (or the database your company uses for its ATG product suite) is installed and running on the server to which you are going to connect. For example, to start the SOLID Server database for evaluation purposes, select Programs > ATG 10.0.2 > ATG Adaptive Scenario Engine > Start SOLID Server from the Windows Start menu.
2. Start ATG 10.0.2 by selecting Programs > ATG 10.0.2 > ATG Adaptive Scenario Engine > Start ATG 10.0.2 from the Windows Start menu. This option starts the Dynamo Application Framework, ATG Personalization module, and ATG Scenarios module on the Web application server that you specified when you installed ATG 10.0.2 (for example, JBoss).

To start the ATG Control Center:

1. From the Start menu, select Programs > ATG 10.0.2 > Tools > ATG Control Center.
2. When the Connect to Server dialog box appears, enter your user name and password for the ATG server to which you are connecting this copy of the ATG Control Center.



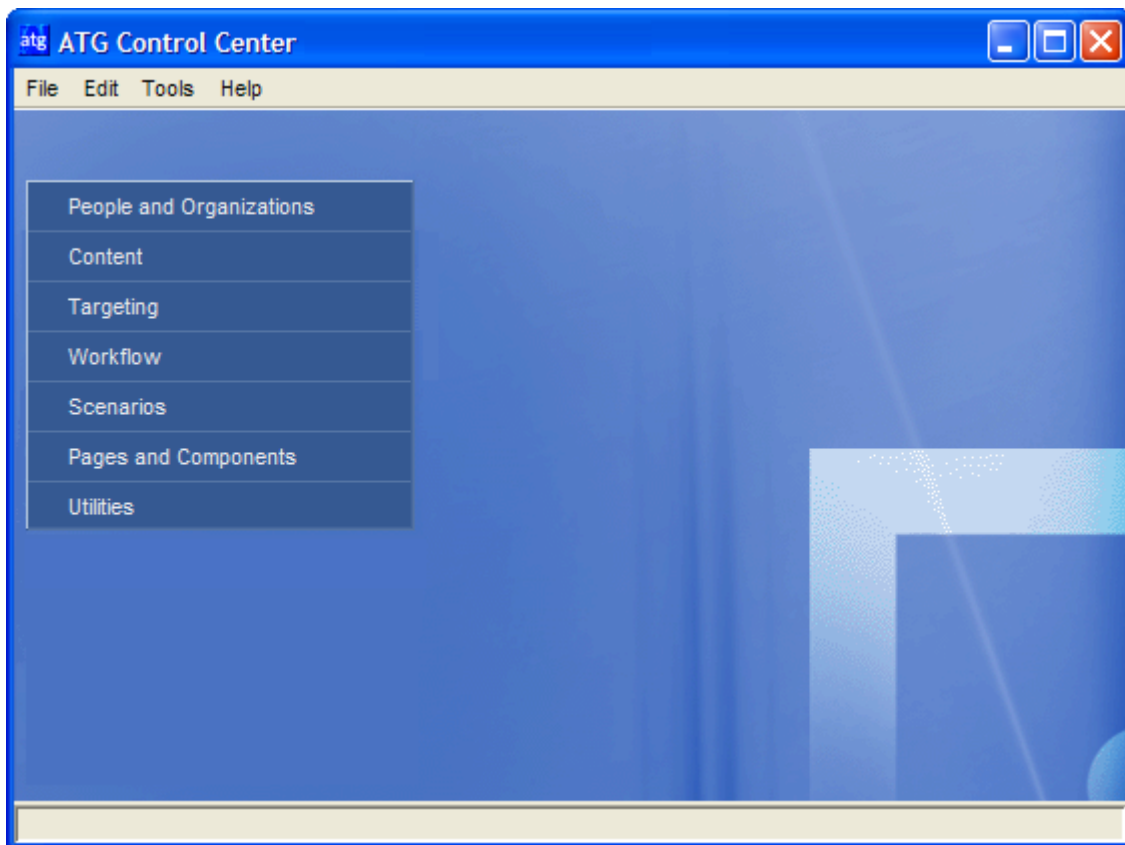
The default value for both is `admin` (note that the user name and password are case sensitive, and the defaults use lowercase characters).

If you do not know the required login information, check with your ATG system administrator.

For information on other ATG Control Center startup options, please refer to the [ATG Installation and Configuration Guide](#).

ATG Control Center Basics

When you start the ATG Control Center, the following screen appears:



ATG Control Center main window

The area at the left of the screen is the main ATG Control Center menu. When you click on any of these menu items, a sublist of secondary menu items appears, and a task window opens to the right.



Note that the number of items you see in the main menu depends on the parts of the ATG product suite that your company has installed. The following table shows the items you see with each product in the suite.

Product	Menu items in ATG Control Center main window
Dynamo Application Framework	People and Organizations Pages and Components Utilities
Personalization module	People and Organizations Content Targeting Pages and Components Utilities
Scenarios module	People and Organizations Content Targeting Workflow (see note below) Scenarios Pages and Components Utilities
ATG Content Administration, ATG Business Commerce, ATG Consumer Commerce, or other ATG products	Additional items appear (for example, Publishing)

Note: The Workflow menu item appears only if your system includes at least one custom workflow type or if you are running ATG Content Administration. For more information, see [Using Workflows](#).

Security Access in the ATG Control Center

As explained earlier, the menu items that appear when you start the ATG Control Center depend on the parts of the product suite that you have installed. However, the options that appear depend also on your security access role, which is set by your company’s ATG Control Center administrator.

The administrator uses the People and Organizations > Control Center Groups option to create a series of roles that correspond to different areas of Web site design and management. Examples might be “application developer,” “designer,” “content editor,” or “business analyst.” He or she defines access privileges for each role; for example, the administrator might give access to the Pages and Components option to the application developer role but not to the business analyst role.

The administrator then uses the People and Organizations > Control Center Users option to create a user profile for everyone who uses the ATG Control Center, and assigns each user one of the roles that he or



she has set up. The parts of the ATG Control Center that you can use, therefore, depend on the role you have been assigned.

For more information, please see *Managing Access Control* in the [ATG Programming Guide](#).

Stopping the ATG Control Center

To shut the ATG Control Center down completely, select Exit from the File menu. This option automatically disconnects you from the ATG server and closes the ATG Control Center window.

If you want to disconnect from the server without closing the ATG Control Center, select Disconnect from Server from the Tools menu. The main ATG Control Center window remains open, but you must log in again before you can do any work in the task windows.

ATG Control Center in Other Documentation

Please note that this manual covers only those parts of the ATG Control Center that apply to business users. For example, it does not describe how to use the Components By Module or Components By Path menu items, which are used by application developers but accessed only rarely by other users. In addition, this manual describes only ATG server products and does not explain how to use applications such as ATG Business or Consumer Commerce, which are described in their own documentation.

The following list shows where to look for information on the parts of the ATG Control Center not covered by this manual:

Menu Item	Associated Task	Documented in...
People and Organizations > Control Center Users	Setting up security access for the ATG Control Center	ATG Programming Guide
People and Organizations > Control Center Groups	Setting up security access for the ATG Control Center	ATG Programming Guide
People and Organizations > Profile Repository	Creating and maintaining user profiles	ATG Personalization Programming Guide
Pages and Components > Dynamo Server Pages	Creating content pages (JHTML files)	ATG Page Developer's Guide
Pages and Components > J2EE Pages	Creating content pages (JSP files)	ATG Page Developer's Guide



Pages and Components > Components by Module	Creating and managing Nucleus components	ATG Programming Guide
Pages and Components > Components by Module		

Note also that the ATG Control Center online help contains extensive information on all areas of the product. To access the help, select Help > Help.



2 Overview: Creating a Personalized Web Site

The tasks that a business user performs with ATG 10.0.2 cover a range of planning and management activities related to setting up and maintaining a Web site. You perform many of these activities in the ATG Control Center. However, the tasks you carry out depend on the parts of the ATG product suite that you have installed.

This chapter presents an overview of the steps you carry out to set up a fully personalized site with the ATG platform.

1. Set up visitor profiles

At the foundation of ATG's personalization system are visitor profiles, a collection of properties that you use to store a range of data about everyone who visits your Web site. You use this data to tailor the content of your site so that, on subsequent visits, each person sees information that matches his or her interests and requirements.

The ATG system creates visitor profiles automatically, but there are some setup and maintenance tasks that you may need to perform to prepare them for the next step in the personalization process.

For more information, see [Setting Up Visitor Profiles](#).

2. Create profile groups

The next step is to put your visitor profiles into groups that represent your Web site's target audiences. For example, you could set up groups based on income range, geographic location, or buying style. You use the profile groups to determine what content you show to whom – for example, you might advertise a specific product to one group and a different product to another.

For more information, see [Creating Profile Groups](#).

3. Set up content items

Web site content is the text, images, and other items (for example, magazine articles or product descriptions) that your visitors see on your site's pages. Content is usually created by a site designer or page developer, and it is stored in content repositories. Like a visitor profile, each content item has a range of properties that defines it. You use these properties when you set up content groups, targeting rules, and tracking sensors for your site, and preparing these properties is one of the tasks you perform as part of setting up a personalized site.

For more information, see [Setting Up Content Items](#).



4. Group content items together

In the same way that you group visitor profiles together, you must also identify similar content items and put them into groups. For example, if you based your profile groups on geographic location (one for U.S. visitors and another for European visitors), you would then create content groups that defined the content that was appropriate for each profile (articles on the New York stock exchange for the US group, articles on European markets for the European group).

For more information, see [Creating Content Groups](#).

5. Match content with your target audiences

Now that you have set up visitor profile groups and content groups, you can create business rules (called **content targeters**) that match the two together – in other words, business rules define the content that you show to each profile group. For example, you could write a rule telling the site to display items from the content group that includes articles about the US stock market to anyone in the profile group for site visitors from the US. In addition to varying content delivery according to a visitor's profile, you can also change it according to the date, the time of day, and other conditions. For more information, see [Matching Content with Your Target Audiences](#).

If you use the Scenarios module, you can create and use scenarios instead of targeting rules to control the content that you display to each profile group. See [Creating Scenarios](#) for more information.

6. Track visitor behavior

An important part of the process of personalizing a Web site is updating visitor profiles with fresh data. This step allows you to consistently show visitors the content that is most relevant for them. For example, you probably want to track the site pages that each visitor displays so that you can determine the content that interests him or her the most. To do this, you set up tracking sensors that monitor your visitors' Web site behavior and activities and update their profiles accordingly. For more information, see [Tracking Visitor Behavior](#).

If your site use the Scenarios module, you can use scenarios instead of sensors to track visitor behavior and update their profiles. See [Creating Scenarios](#) for more information.

7. Preview your Web site

The ATG Control Center provides preview features that you use to check how your Web site will look to visitors with certain profile properties under various time conditions. For example, you can see how a particular page in the Quincy Funds demo will appear to visitors who describe their investment strategy as "conservative." For more information about previewing, see [Previewing Your Web Site](#).

8. Analyze data

This step applies only if your site uses ATG Customer Intelligence.

Creating business reports allows you to capture and analyze a wide range of data related to your site visitors and their activities at your Web site. By analyzing this data, you can improve your visitors' experiences at your Web site, predicting their needs and responding by providing more relevant content. You can also use data from



reports to fine-tune your scenarios and make changes to your Web site design. For more information, refer to the ATG Customer Intelligence documentation.

Additional Business User Activities

You can also use the ATG platform to create and maintain workflows, which allow you to set up many business processes so that they can be performed online. For example, you can set up a Web-based approval process for employee expenses and make it available on your company's intranet. Although not required as part of setting up a personalized Web site, activities such as creating workflows allow you to further streamline your organization's internal practices by making them part of the same system you use to interact with the people who visit your external Web site.

For more information on workflows, see [Using Workflows](#).





3 Setting Up Visitor Profiles

When a person visits your Web site, the ATG platform automatically creates a **profile** for him or her and stores it in a profile repository set up by the application developers working on your Web site. The profile contains properties that describe the person's characteristics. There are two kinds of profile properties: *explicit* and *implicit*. Site visitors provide explicit properties themselves, for example when they fill out a registration form to become a member of your site. Examples of explicit properties are a person's name and address. Implicit properties, in contrast, represent information that the system gathers about visitors by tracking their behavior at your site. A list of recently browsed Web pages is an example of an implicit property.

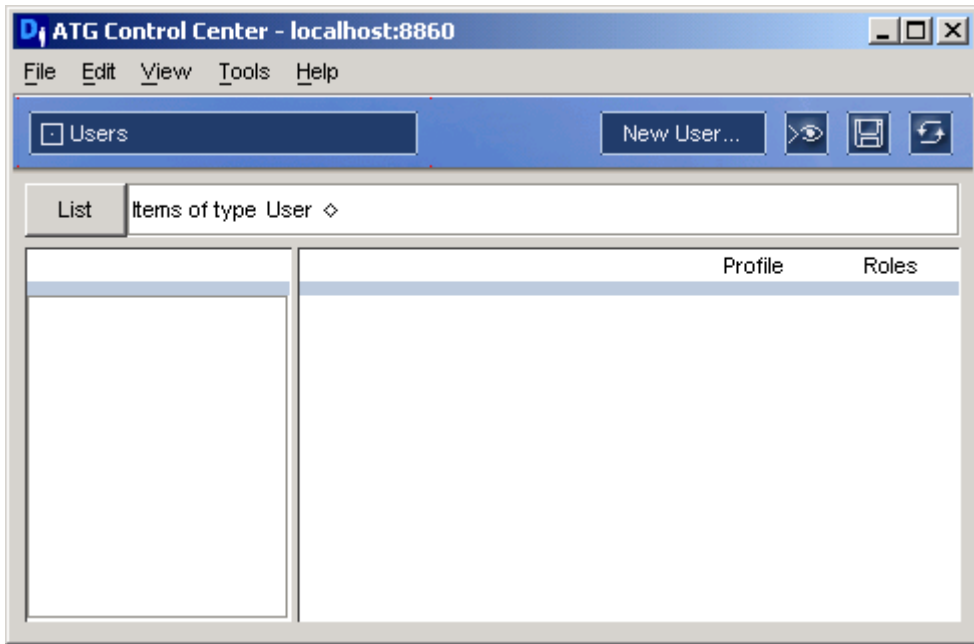
Keeping track of profile properties makes it possible for a Web application to "remember" who users are from one visit to the next, and to deliver personalized content to them accordingly. For example, you could have an option on your registration form that asks visitors to indicate their income range; the system stores this information as a profile property. You could then set up your site content so that you display different items according to the income range of each site visitor.

Usually, the system updates profile properties automatically; you do not have to change them yourself. However, the ATG Control Center includes options that let you view the profiles in the repository. You can also use them to add, edit, and delete profiles if necessary.

Note: If your ATG installation uses ATG Content Administration, it is recommended that you use the ATG Business Control Center to manage visitor profiles. For more information, refer to the [ATG Business Control Center Administration and Development Guide](#).

Viewing Visitor Profiles

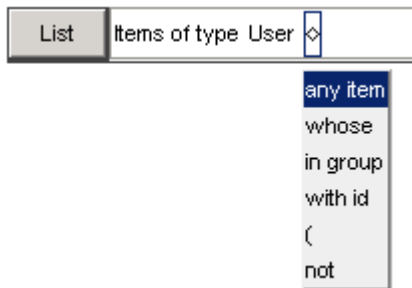
Business users generally view profiles in the profile repository by means of the Users window. To display it, select People and Organizations > Users. The following image shows the Users window:



People and Organizations > Users window

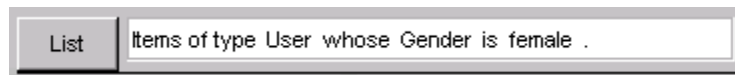
Use the query editor at the top of the window to find and display visitor profiles. For example, to find all profiles that have a Gender property set to female, you would do the following:

1. Click in the small diamond after User and select whose from the drop-down list that appears.



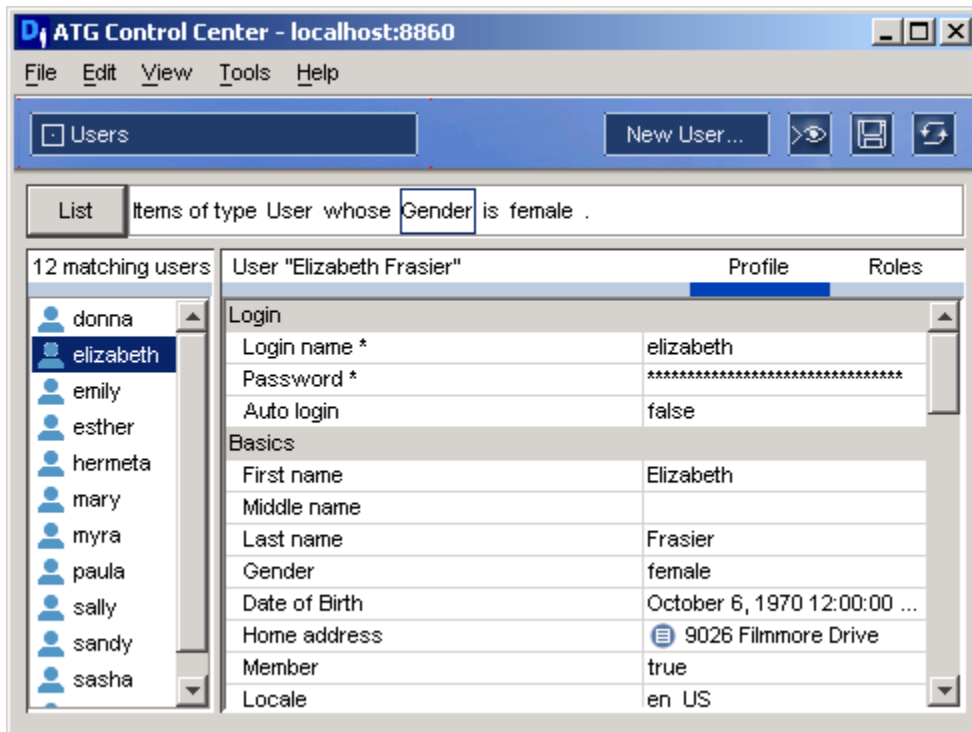
2. Click in the area after whose and select Gender from the drop-down list. (The items you see in this list correspond to the properties in your profile repository, so Gender might not appear on your system.)
3. Click in the area after Gender and select is from the drop-down list. The items here are operators that define the relationship between the first half of the expression and the second.
4. Click in the area after is and select female from the drop-down list. (The items here are the possible values for the property you specified in step 3.)

At this point, the query would look like this:



Click List. In the panel on the left, the system displays a list of all the profiles with a Gender property set to female. (By default, items in this list are ordered alphabetically by their Login Name values.)

When you select a profile from the list, a table showing the properties in the profile and their current values appears on the right side of the window:



Sample Profile in the Users Window

Information in the right pane is displayed as follows:

- The Profile tab shows the profile properties for this visitor.
- The Roles tab shows the organizational and global roles to which this person is assigned. Organizational roles appear with checkboxes at the top of the window. Global roles appear in the Additional Roles list at the bottom. For more information, see [Creating Roles](#) later in this chapter.

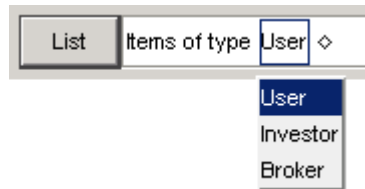


Determining the Profile Type

In versions 5.5 and later of the Personalization module, it is possible to have more than one type of visitor profile in the same profile repository. The developers working on your site can create a base set of profile properties for every user, and then create sub-types that include additional properties unique to each subset. For example, you could create a base set of profile properties that are common to all site users, and then add two sub-types, “administrator” and “visitor.” Each sub-type would have its own distinct properties in addition to the common ones.

These sub-types are called “profile types,” and you can use them in most places in the ATG Control Center where you are required to define groups of site visitors; for example, you can use them as filters in scenario People elements or as part of a content targeting rule.

To view the different profile types in your system, use the query field in the Users window. Click the Users entry as shown in the following example, taken from the profile repository supplied with the Quincy Funds demo:



In this example, the profile repository includes the base profile type, User, as well as two sub-types, Investor and Broker.

To see the profile properties associated with a specific profile type, perform a query for that type and then click List. The names of site visitors assigned that profile type appear in the list on the left of the Users window. When you select one of the names, the right pane of the window displays the properties from the base profile type in your system as well as the properties that are unique for that type.

Note that the ATG Control Center does not currently support changing a user’s sub-type after you have created his or her profile. For example, in the Quincy Funds demo, you cannot change a user’s profile sub-type from “broker” to “investor.” If you do need to change a user’s sub-type, you must delete his or her profile and then add a new one, specifying the correct sub-type.

For more information, refer to *Defining the Profile Repository* in the [ATG Personalization Programming Guide](#).

Editing Profile Values

As mentioned above, you do not usually have to edit the values in profile properties yourself; the ATG system does this automatically. For example, as part of creating a personalized Web site, you set up sensors or scenarios that track visitor’s behavior at your site and change profile properties accordingly. Or your developers might create a registration form with specific fields for new members to fill out; they set the form up so that the system updates the new member’s profile with the information he or she enters. However, there may be some situations in which you do have to edit a value yourself. For example, a site





visitor might contact customer service with a request to change some of his or her information. To edit a value, do the following:

1. Select People and Organizations > Users.
2. Find and display the visitor profile that contains the value you want to change.
3. Click the cell for that value to make it active.
4. Change the value as needed. The way you enter the new value depends on the type of property you are working with.
 - If a drop-down menu button appears when you highlight the value field, click the button and select the new entry from the list.
 - If an ellipsis button (a button with "...") appears when you highlight the value field, click the button. An edit dialog box appears, which you use to specify the new entry. In some cases you select the entry from a list of possible values; in others, you type the entry into the edit box.
 - For fields that can contain more than one value, an ellipsis button leads to a dialog box containing Insert Before and Insert After buttons. See [Filling in Properties with Multiple Values](#) for more information on how to use this dialog box.
 - If the value field contains a small black arrow, the value is linked to another item type in the repository. Click the arrow. Then click the ellipsis button to open a search dialog box where you can select or create new repository items of that type.
 - If no buttons or other interface elements appear when you highlight the value field, you can type the new value directly into the cell.
 - Required properties have an asterisk next to their names.
 - Read-only properties are displayed in gray. You cannot edit their values.
 - Some properties are linked to other properties from which they inherit their values. For more information, see [Editing Derived Properties](#).
5. Select File > Save.


Editing Derived Properties

Some profile property values are inherited from other properties or from a parent organization or role (see [Using Organizations and Roles](#) later in this chapter). These properties have the following icons:

-  Indicates a property that inherits its value from another property (for example, in a parent organization or role).
 - To see how the property inherits its value, click the icon and select Derivation Details from the pop-up menu.
 - To override the inherited value, click the "..." button or type the new value directly into the field.
-  Indicates a property whose inherited value is currently being overridden by its own local value.



- To see how the property inherits its value, click the icon and select Derivation Details from the pop-up menu.
- To use the derived value, click the icon and select Use Derived Value from the pop-up menu.

 Indicates a property whose value comes from a property in a different repository item.

- To edit the repository item, double-click the icon to open the Item Editor.
- To select or create another repository item of that type, click the “...” button.

Adding Visitor Profiles

When a site visitor registers at your site, the ATG system automatically adds a profile for him or her to the profile repository. (It also creates a different type of temporary profile for anonymous visitors – those who visit your site but do not register. For more information, see *Working with User Profiles* in the [ATG Personalization Programming Guide](#).) For this reason, you do not usually have to add profiles to the system yourself. However, if you do have to add a profile, for example for test purposes, follow this procedure:

1. Display the Users window (People and Organizations > Users).
2. Select File > New User. The New Item dialog box appears.
3. In the Item Type list, select the type of profile that you want to add. For more information on different profile types, see [Determining the Profile Type](#).
4. Enter values as necessary. Properties with an asterisk are required, but the rest are optional. See [Editing Profile Values](#) for more information.

The system adds the new profile and displays it in the list on the left of the Users window. (By default, items in this list are ordered alphabetically by their Login Name values.)

Deleting Visitor Profiles

To delete a visitor profile from the profile repository, do the following:

1. Display the Users window (People and Organizations > Users).
2. Find and display the profile you want to delete.
3. Right-click on the user’s name in the list on the left.
4. Select Delete from the pop-up menu.
5. Click Yes to confirm the deletion.

A Note about the Profile Repository Window

Depending on your security access role (see [Security Access in the ATG Control Center](#)), you may be able to view and work with visitor profiles through both the Users window and the People and Organizations > Profile Repository window.

The Users window is designed for business users. It shows a subset of information that is contained in the profile repository. When you add, edit, or delete information in the Users window, you are in effect



making these changes to the profile repository as well. For example, if you edit a value in the Users window (changing a visitor's marital status to "married,"), the change also appears in the Profile Repository window. The reverse, however, is not always true; when you add or edit certain properties through the Profile Repository window, your changes do not appear in the Users window until you restart the ATG server to which the ATG Control Center is attached.

The same caveat applies to the Organizations and Roles windows (see the next section). It is highly recommended that you use these windows rather than the Profile Repository window to add or edit user directory items.

Using Organizations and Roles

In addition to setting up profiles for individual users (customers who are site visitors, or other types of site users such as administrators), you can set up additional profiles for abstract entities called "organizations" and "roles" and use them to create a multi-level organization of site users grouped by function.

Some sites require only a one-level or flat organizational structure for their visitors. For example, a large retail site may have many different types of visitor (new customers, frequent buyers, customers with a high income, residents of a specific area), and those visitors may have dramatically different needs in terms of the content of the site. Regardless of their different requirements, however, they perform essentially the same role – retail customer – at the site. For a site such as this, the organizational structure of visitors requires one level only.

A profile repository configuration that includes organizations and roles is useful for sites that serve a variety of visitors with widely differing functions. (Often, for these sites, the term "user" is more appropriate than "visitor" or "customer.") For example, a business-to-business commerce site might have some users who are buyers and others who have the supervisory role of approving certain purchasing decisions. In addition, other users may act as administrators for the site. In this case, the site's organizational structure could have two or possibly three levels. Other examples of sites that might involve multi-level user relationships are sites that manage interactions between a business and its partners, or sites that function as an Internet community or discussion forum.

How Organizations and Roles Work

Organizations correspond to the different ways you can group users. For example, you could set up organizations that correspond to the different business units in a company, or to different geographic areas. Like users, each organization has its own profile in the profile repository. The following example shows the profile of an organization called US Motor Works:

US Motor Works, Inc.		Profile	Members	Roles
Basics				
Name *	US Motor Works, Inc.			
Description				
Company logo	us-motor-logo.gif			
Customer type	Enterprise			
Type	company			
DUNS Number	222			
Contract	USMW Contract			
Contact Info	[]			
Administrators	[mary]			
Billing & Shipping				
Authorized Billing Addresses	{US Motor Works - Medford=6 Tremont St...			
Authorized Shipping Addresses	{Eagan Manufacturing, Inc=14378 West H...			
Authorized Payment Types				
Authorized Cost Centers	[administration, distribution, sales, toolsho...			
Default Billing Address	25 East Cambridge St.			
Default Shipping Address	286 East Street			
Default Payment Type				
Default Cost Center	administration			

Organization profile

Roles correspond to specific functions that a person can perform within an organization, such as “vice president” or “administrator.” Like users and organizations, each role has its own profile in the repository. The following example shows the profile of a role called “Senior Approver”:

Role "Senior Approver" (in finance)		Profile	Members
Name *	Senior Approver		
Description	Approve orders over the purchase limit		
Function *	approver		

Role profile

After you have set up organizations and roles, you assign users to them. Depending on the way your profile repository is configured, users can inherit the profile properties of the organization or role to which they are assigned. In the same way, you can assign roles to organizations; in this case, any user who is a member of an organization automatically inherits any roles you have assigned to it. You can also create a hierarchy by assigning organizations to other organizations; for example, you could assign two organizations called “North West” and “South West” to an organization called “Western Region.” Again, each child organization can inherit the profile properties of the parent organization.

You can use a combination of users, organizations, and roles (also called a “user directory”) to control access to various areas of the site. You can also use them as you would use profile groups – you can set up



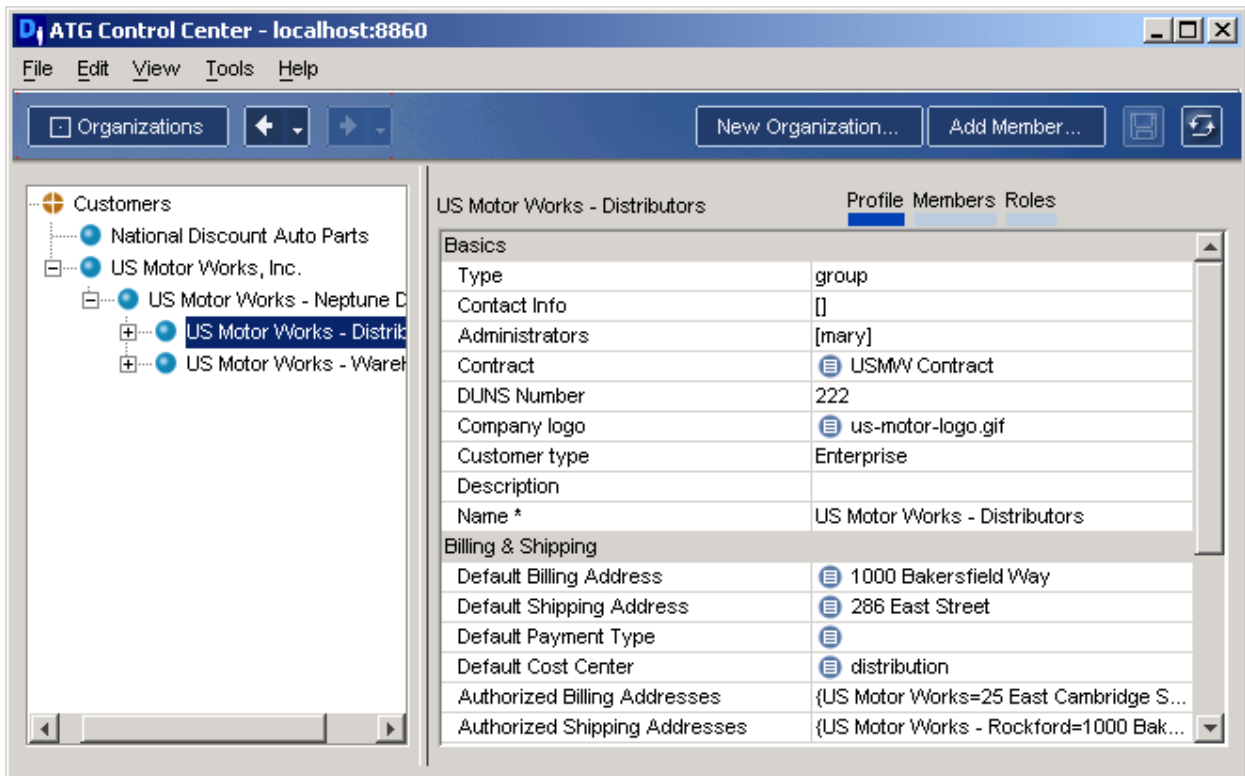
scenarios and targeters that deliver appropriate content to members of a given organization, for example, or to users assigned a specific role. (For more information on scenarios, see [Creating Scenarios](#). For more information on profile groups, see [Creating Profile Groups](#).)

Note that the ATG Control Center itself contains a working implementation of a user directory. Each ATG Control Center user has a profile in the Admin SQL Repository, and the ATG system administrator can view and edit the profiles through the People and Organizations > Control Center Users window. In addition, the administrator uses the People and Organizations > Control Center Groups window to set up ATG Control Center roles (for example, developer, designer, or manager) that include access rights to each area of the ATG Control Center. The administrator then assigns each user to a role, and the user inherits the access rights of that role.

For information on how to use organizations and roles for site security and access control, refer to the [ATG Programming Guide](#).

Creating Organizations

You can use the People and Organizations > Organizations window in the ATG Control Center to add, view, and delete organizations. You can also use it to assign users and roles to organizations. The following image shows the Organizations window:



People and Organizations > Organizations window



The left pane shows any organizations you have already set up.

Information in the right pane is displayed as follows:

- The Profile tab shows the profile properties for this organization. Note that, as you can for user profiles, you can have more than one type of profile for organizations in your system. Each type shares a set of base properties and then has a set of additional properties unique to that type. In the image above, the profile type for this organization is group.
- The Members tab shows a list of the users assigned to this organization. Click on a user's name to see his or her profile and roles.
- The Roles tab shows a list of roles that belong to this organization.

Adding a New Organization

Before you can add new organizations in the ATG Control Center, you may have to set up an organization template by adding the profile properties that make up an organization to the profile repository definition file. For information on how to do this, refer to *Working with the Dynamo User Directory* in the [ATG Personalization Programming Guide](#).

To add a new organization, complete the steps below.

1. Select People and Organizations > Organizations. The Organizations window appears.
2. In the left pane of the window, select the position in the organization hierarchy where you want to create the new organization. (See also [Assigning an Organization to Another Organization](#).)
3. Click the New Organization button. The New Item dialog box appears.
4. Select Organization from the Item Type dropdown list.
5. In the New Organization Values area of this dialog box, specify values for this organization's profile properties. Properties with an asterisk are required. Other properties are optional.

For information on how to add new properties to the template for this organization, refer to *Working with the Dynamo User Directory* in the [ATG Personalization Programming Guide](#).

6. Click OK. The new organization appears in the list in the left pane.

Duplicating Organizations

If your user directory contains several organizations with similar profiles, you can save time during the setup process by creating one and then copying it as many times as you need. You then have to edit only the profile properties that are unique to each one.

1. In the left pane of the Organizations window, select the organization you want to copy.
2. Right-click the organization's name in the list.



3. Select Duplicate from the right-click menu. A copy of the organization appears in the list on the left.
4. Type a new name for the copy in the Name field and change any other properties as required.
5. Select File > Save.

Deleting Organizations

To delete an organization, complete the following steps:

1. Check any existing profile groups, content targeters, and scenarios that may contain references to the organization you want to delete, and rewrite them if necessary.
2. In the People and Organizations > Organizations window, select the organization you want to delete.
3. Select File > Delete Organization.

Assigning Users to an Organization

To assign users to an organization, complete the steps below. **Note:** It is highly recommended that you perform this task in the Organizations window, as described, rather than in the Profile Repository window. See [A Note about the Profile Repository Window](#) for more information.

1. In the People and Organizations > Organizations window, select the organization to which you want to add a user.
2. Display the Members tab for this organization.
3. Click the Add Member button. The New Item dialog box appears. You can add an existing user to the organization or create a user and add him or her as a member of the organization.

To create a user in the repository, click the New Item button and enter the user's profile information in the form that appears.

To add an existing user as a member of the organization, find the user in the repository by creating a query in the query field at the top of the window. You can select more than one member from the list that your query returns. Hold down the Control key while selecting the users you want to add, and click OK when you are ready to add the users to the organization.

The new member appears in the top half of the Members window. If you click the new member's name, his or her profile appears in the bottom half of the window. Click the Roles tab to show a list of roles to which this user is assigned.

You can delete members of an organization by selecting them from the list of members and choosing File > Remove Members.

If your organizational structure includes several levels, refer to [A Note about Displaying Organizational Inheritance](#) for information on displaying the membership list for child and parent organizations.



Assigning an Organization to Another Organization

As described earlier, you can set up multi-level organizations where one organization is considered to be the “child” of another. In this case, the child organization inherits the properties of its parent organization. Any user that you assign to the child organization is automatically a member of the parent as well (assuming your profile repository is set up to allow inheritance).

To turn an existing organization into the child of another, use drag and drop functionality:

1. Display the People and Organizations > Organizations window.
2. Select the organization that you want to turn into a child organization.
3. Drag its icon to the new place in the tree.

To create an organization as a child of another organization, follow the steps in [Adding a New Organization](#). In step 2, select the organization that you want to designate as the parent, and then continue with the procedure.

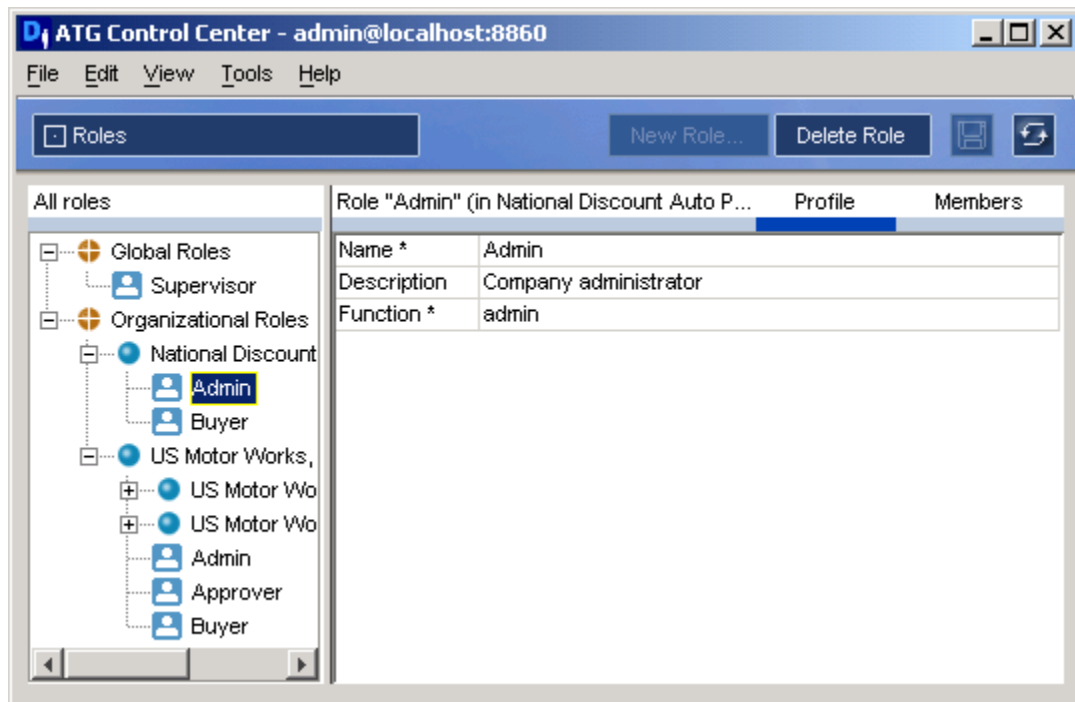
A Note about Displaying Organizational Inheritance

Note that the Organizations window shows only users who are directly assigned to each organization; users who are members of a child organization are not listed as members of the parent organization, even though they do inherit membership of the parent. Consider the following example. You create a parent organization called West Coast and a child organization called Sales. You assign an employee called Ruth to the child organization. She inherits membership of the parent organization, but in the Members panel of the Organizations window she appears only as a member of the Sales organization, the one to which she is directly assigned.

See also [A Note about Displaying Role Inheritance](#).

Creating Roles

You can then use the People and Organizations > Roles window in the ATG Control Center to add, view, and delete roles, and to assign roles to users and organizations. The following image shows the Roles window:



People and Organizations > Roles window

The list in the left pane shows any roles and organizations you have already created. Information in the right pane of the Roles window is displayed as follows:

- The Profile tab shows the profile properties for this role. Note that, as you can for user profiles and organizations, you can have more than one type of profile for roles in your system. Each type shares a set of base properties and then has a set of additional properties unique to that type.
- The Members tab shows a list of the users and organizations assigned to this role.

Roles can be either global or organizational as described the following sections.

Global Roles

Global roles represent any type of generic or specific function or activity that you choose. You can do the following with a global role:

- Assign it to any users or organizations, which then inherit the properties of that role as additions to their own profiles.
- Group similar global roles together into folders to help you manage them more easily.



Organizational Roles

Organizational roles are specific to a particular organization. You can do the following with an organizational role:

- Assign it to the organization under which you created it in the Roles window. (Note that you cannot assign an organizational role that you created for Company Y to Company Z.) The role is then automatically assigned to all users who belong to that organization.
- Assign it to any individual user who is a member of the organization to which the role belongs. In this case, other members of the organization do not automatically inherit the role's properties.

Organizational roles contain a property called "function" that you can use as a way of identifying similar roles in different organizations. Suppose you have a business-to-business commerce site. The companies with whom you do business are defined as organizations in the ATG Control Center – you create an organization called Company A and another called Company B. Each company has buyers who are responsible for buying products from your site. You decide that you want to offer different prices to each buyer depending on his or her organization; for example, you want buyers from Company A to have a 15% discount on any backordered item, but you do not want to offer this discount to buyers from Company B.

You set up two organizational roles, Buyer A and Buyer B, and assign one to each organization. You can then design your pricing structures and scenarios to differentiate between the two, offering distinct discounts to each role. However, in other ways the two roles are very similar, and you decide you want to establish a connection between them. You specify "buyer" as the function property for each role – this property acts as a sort of keyword and allows ATG 10.0.2 to keep track of the fact that the roles are related. Your site developers could then write custom applications that use this property in a variety of ways; for example, they could create custom scenario events that are triggered by members of any organizational role with a given function value. (See [Creating Scenarios](#) for more information.)

The following images show the profiles you set up for the two organizational roles. Note that the value of the Function property is the same for each one.



Role "Buyer A"		Profile	Members
Name *	Buyer A		
Description	Buyer for Company A		
Function *	buyer		

Role "Buyer B"		Profile	Members
Name *	Buyer B		
Description	Buyer for Company B		
Function *	buyer		

Adding a New Role

Before you can create new roles in the ATG Control Center, you may have to set up a role template by adding the profile properties that make up a role to the profile repository definition file. For information on how to do this, refer to *Working with the Dynamo User Directory* in the [ATG Personalization Programming Guide](#).

In addition, it is important to consider the following information about role names before you start adding roles:

- The names you give global roles must be unique within their folder. However, if you want to use global roles to define membership of a profile group (so that you can then use a person's role as a basis for content targeting, for example), all global roles names must be unique within the profile repository.
- The names you give organizational roles need to be unique only within their organization, even if you plan to use them to define a profile group.

For more information on using roles within a profile group or to perform content targeting, see [Defining Profile Group Members](#).

To add a new role, complete the following steps:

1. In the list on the left, select the position where you want the new role to appear. For example, to create a global role in a specific folder, select that folder. If you are creating an organizational role, select the organization to which you want this role to apply. **Note:** To create an organizational role, you need to have created the corresponding organization already. See [Adding a New Organization](#) earlier in this chapter.
2. Click the New Role button. The New Item dialog box appears.



3. In the New Role Values area of this dialog box, specify values for this role's profile properties. Properties with an asterisk are required. Other properties are optional.

For information on how to add new properties to the template for this role, refer to *Working with the Dynamo User Directory* in the [ATG Personalization Programming Guide](#).

If the role's properties include Direct Access Rights, you may be able to use roles to control user access to the pages of your Web site. For more information, see [Using Roles for Access Control](#).

4. Click OK. The ATG Control Center adds the new role to the list.

Important: Organizational roles are **not** automatically assigned to the organizations under which you create them. You must assign them explicitly. See [Assigning a Role](#) for more information.

Deleting Roles

To delete a role, complete the following steps:

1. Check any existing profile groups, content targeters, and scenarios that may contain references to the role you want to delete, and rewrite them if necessary.
2. In the People and Organizations > Roles window, select the role you want to delete.
3. Select File > Delete Role.

Assigning a Role

If you assign a role to a user, he or she inherits its profile properties, including any accompanying security access rights. Similarly, if you assign a role to an organization, every member of that organization inherits that role. (Note that your profile repository may be configured so that this behavior does not occur; see the [ATG Personalization Programming Guide](#) for information on configuring profile property inheritance.)

There are several methods you can use to assign roles to users or organizations. The one you choose depends on the scope of the task. If you are assigning a role to many users or several organizations, for example during initial configuration of a new system, use the Roles window. See [Assigning a Role to Multiple Users or One or More Organizations](#). If you are working with just one user, for example a new employee that you have added to an existing system, it is easier to assign roles through the Users window. See [Assigning a Role to a Single User](#).

Note: It is not recommended that you perform this task in the Profile Repository window. See [A Note about the Profile Repository Window](#) for more information.

Assigning a Role to Multiple Users or One or More Organizations

This method uses the Roles window to assign roles, which represents the easiest way to complete this task in cases where you are working with a large number of users at once. It is also a convenient way to assign roles to any number of organizations.

1. Display the People and Organizations > Roles window.
2. Select the role you want to assign.



3. Select File > Add Member. The Add Member dialog box appears.
4. Use the query box at the top of the display to list the users or organizations to whom you want to assign the role. You can assign a global role to anyone or to any organization, but you can assign organizational roles only to users who are already members of that organization.
5. Click OK.

Assigning a Role to a Single User

The procedure below describes how to use the People and Organizations > Users window to assign roles. This method is convenient for situations where you want to assign a role to an individual user.

1. Display the People and Organizations > Users window.
2. Select the user to whom you want to assign a role.
3. Display the Roles tab. The roles available to this user appear. The top panel shows all organizational roles available to the organization to which this user belongs. The bottom panel (Additional Roles) shows all global roles that you have already assigned to this user.

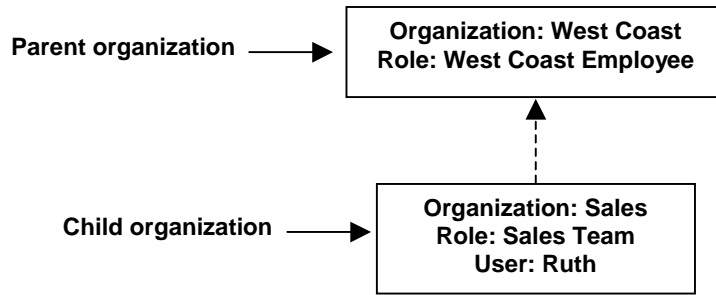
Organizational roles that have already been assigned to all users in this organization appear in gray; you cannot edit them in this window. Organizational roles that you created for this organization but have not assigned to all users appear in black. To assign one of these to this user, select the checkbox.

A Note about Displaying Role Inheritance

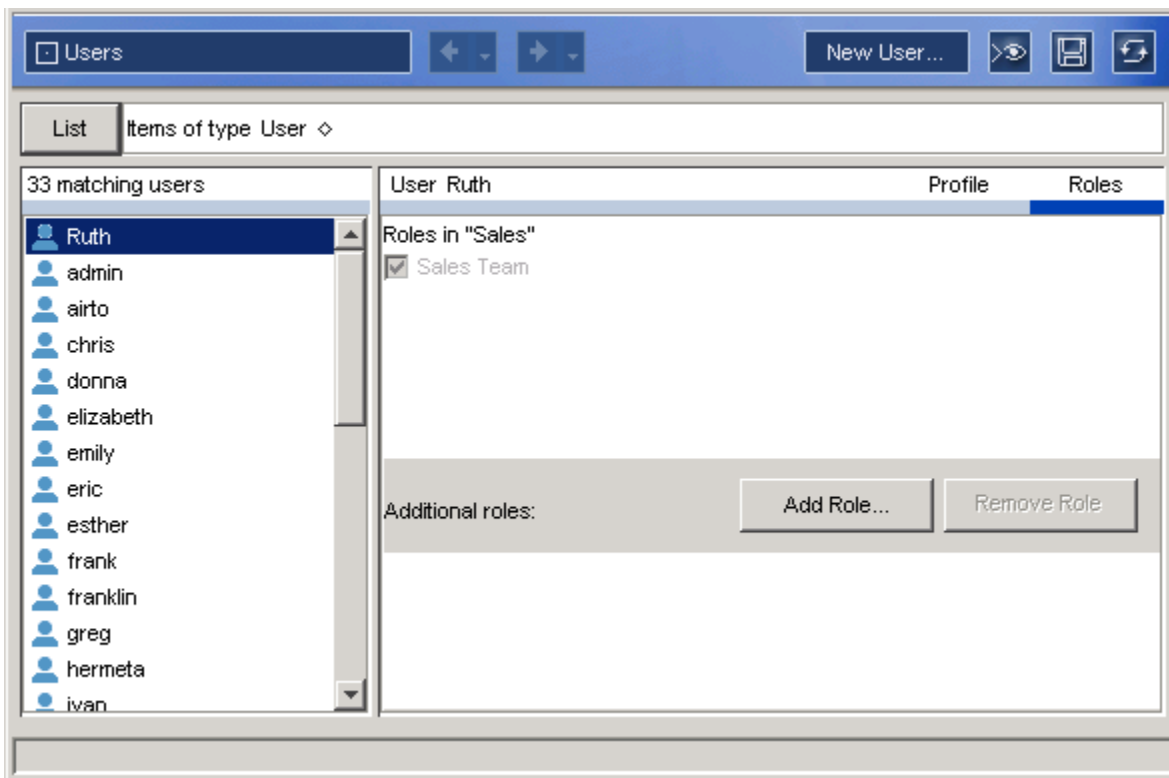
As described earlier, users who are members of a given organization automatically acquire any global or organizational roles that you assign to that organization. Role inheritance also works for child organizations; a user who is assigned to a child organization inherits the roles of the parent organization.

Note that the only way to view all the roles that a user has inherited is through the People and Organizations > Roles window. You cannot identify all a user's inherited roles through the Users window; in this window, you can see only the roles that a user is assigned individually and the roles associated with the organization to which he or she has been directly assigned.

Consider the following example. You create an organization called West Coast and you create an organizational role for it called West Coast Employee. Then you create a child organization called Sales and an organizational role for it called Sales Team. You assign an employee called Ruth to the child organization. She inherits the Sales Team role from her own organization, and she also inherits the West Coast Employee role from the parent organization.



If you view Ruth’s role information in the People and Organizations > Users window, or through the Users panel that appears in the People and Organizations > Organizations window, you can see only the Sales Team role, which is the role associated with the organization to which she is directly assigned. The West Coast Employee role is not listed.



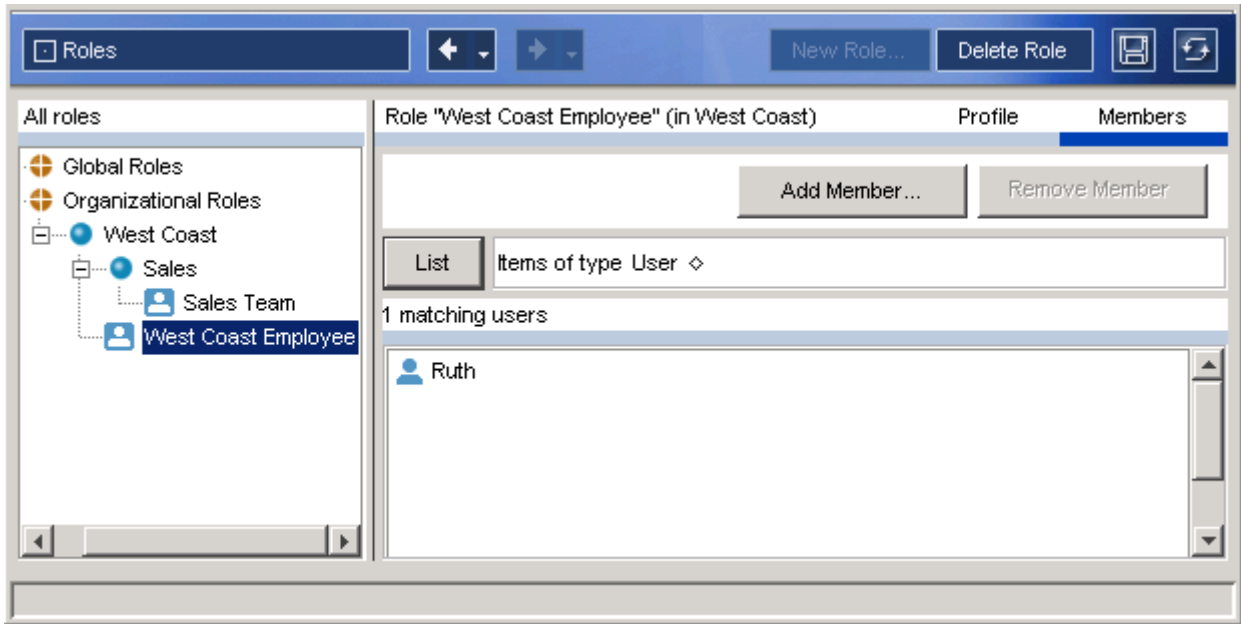
Users window showing roles for organizations to which a user is directly assigned

To confirm that Ruth has indeed inherited the role of West Coast Employee, use the Roles window:

1. Display the People and Organizations > Roles window.
2. Select the West Coast Employee role from the list on the left.



3. Display the Members tab.
4. In the query box, specify Items of Type User, and then click List.
5. Verify that Ruth's name appears in the list, as shown in the image below:



Roles window showing all users assigned to an organizational role

See also [A Note about Displaying Organizational Inheritance](#).

Using Roles for Access Control

Depending on the configuration of your ATG product suite, you may be able to use roles to control access to the pages of your Web site. For example, you might have several pages on your site that you want to make available only to customer service representatives. You can set up a role called Customer Service Rep and add an access right to that role that allows entry to the specified site pages. Any user who is assigned that role (either directly or by inheriting it through membership of an organization) can access the appropriate pages. For information on how to set up roles to perform access control, see the [ATG Personalization Programming Guide](#).

Note that role-based access rights are typically used to control access among internal users (employees of your company). For external site visitors, such as customers, access control to specific areas of a Web application is usually configured through methods such as registration, login requirements, and password authentication. For more information, see the [ATG Personalization Programming Guide](#).





4 Creating Profile Groups

A **profile group** represents a segment of your target audience. You create these groups in the Profile Groups window by defining rules that *include* or *exclude* visitors according to their profile properties. For example, you could create a profile group called *HighEarners* that includes female college graduates earning more than \$150,000 per year but excludes people from California. The rules that define this group 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.state is California
```

Once you set up this profile group, you can use the Targeting > Content Targeters window to create targeting rules for delivering personalized content to people who match the *HighEarners* criteria. For example:

```
Show this content:
  newLuxuryCars.jsp
To these people:
  people in group HighEarners
```

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

Important: In the ATG Business Control Center, profile groups have been replaced by user segments, which provide additional functionality (a more flexible editor for specifying the rules that make up a group). If your ATG installation uses ATG Content Administration, it is strongly recommended that you use the ATG Business Control Center rather than the ACC to accomplish the tasks described in this chapter. In addition, if you are working in a multisite ATG environment (one in which a single instance of ATG products supports more than one Web site), please be aware that profile groups do not have any multisite capability. User segments created through the ATG Business Control Center are multisite aware. For more information on user segments, refer to the [ATG Business Control Center User's Guide](#). For information on a multisite environment, refer to the [ATG Multisite Administration Guide](#).

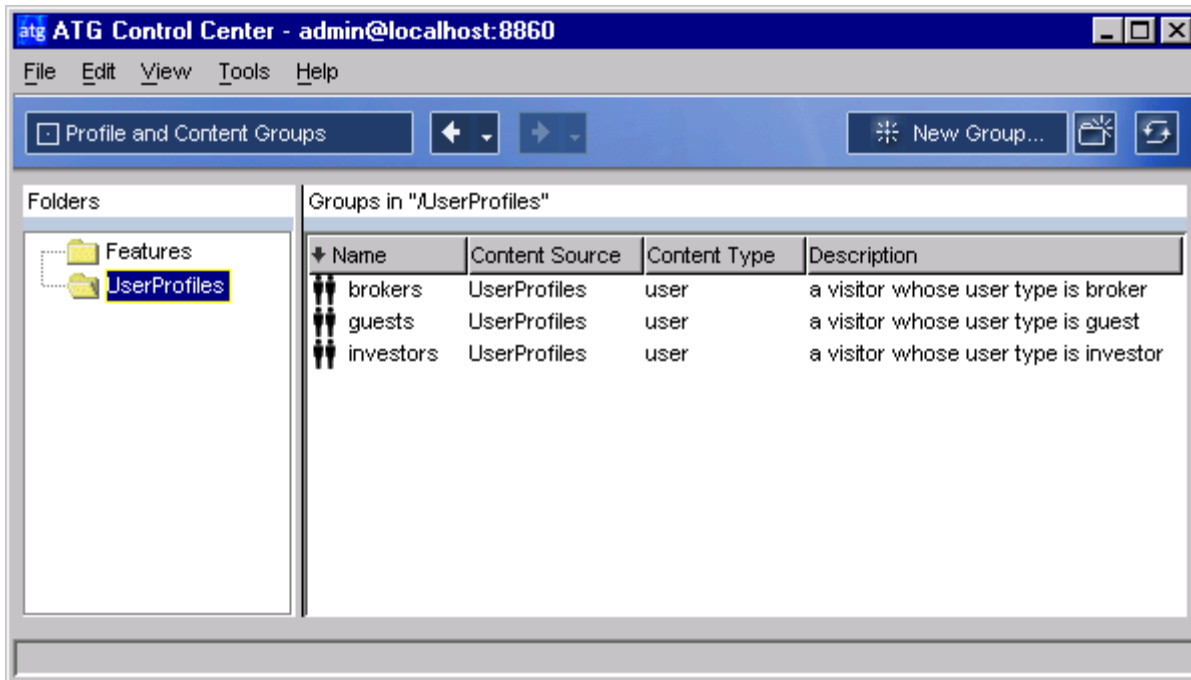
Using Profile Groups with Organizations and Roles

Profile groups can exist independently of organizations and roles (see [Using Organizations and Roles](#)). You do not have to set up a user directory in order to perform content targeting with profile groups.

Conversely, you can set up a user directory and use it to perform content targeting without creating any profile groups; instead, you can create content targeters or scenarios that use a person's assigned organization or role to determine the content to display. For examples, see [Creating Scenarios](#).

Viewing Profile Groups

You can view a list of existing profile groups through the Profile and Content Groups window in the ATG Control Center. To display this window, select Targeting > Profile and Content Groups.



Targeting > Profile and Content Groups window

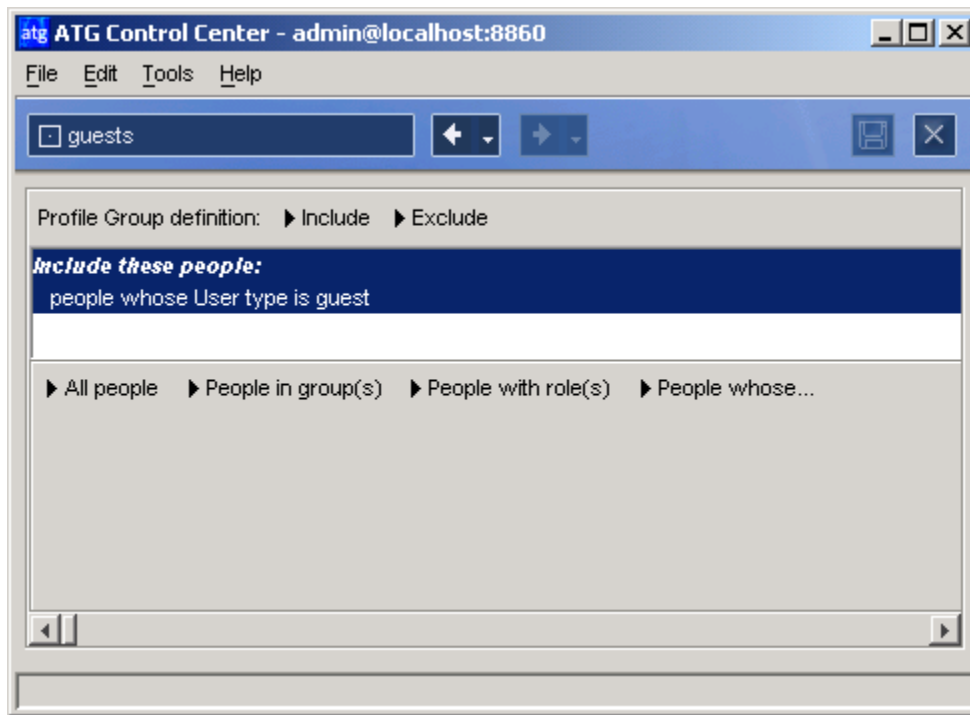
The window has the following features:

- The panel on the left shows a list of folders containing the profile or content groups that have already been created for your Web site. Profile groups are identified by the icon.
- The panel on the right panel shows all profile groups in the selected folder. You can add new groups to this list by clicking the New Group button on the toolbar. For more information, see [Creating New Profile Groups](#).
- The Name column shows the name of each group in the selected folder. Note that the arrow next to the column title shows how groups are sorted in this list; in this example, the profile groups are sorted alphabetically by their entry in the Name column. Clicking the column title reverses the sort order.



- The Content Source column shows the name of the repository containing the visitor profiles that are included in this group. (**Note:** Repositories are typically set up by the application developers working on your Web site. For more information on how repositories are created, refer to the [ATG Repository Guide](#).)
- The Content Type column shows the specific subset of items in the repository to which the visitor profiles in this group must belong. (The subset is often used elsewhere in the product for organizational or querying purposes.)
- The Description column displays a brief description of each group. If the column is too narrow to display all the text, hold the mouse pointer over a description that you want to read. The description text appears in a blue box.

To display the rules that define membership of a given profile group, click the group’s name in the Name column. The following window appears:



Profile Group Definition window

The window has the following features:

- Include and Exclude buttons, which allow you to add rules that include or exclude specific profiles from this group; for example, you could set up a rule that includes any profile whose gender property is “male” or a rule that excludes profiles whose age property contains a value less than 21.
- A blue definition panel that shows the rules for this profile group.



- A series of buttons (All People, People in Group(s), People with Role(s), People Whose...) that you use to define the rule selected in the definition panel. Note that more buttons become available as you edit the rule.

Creating New Profile Groups

Whenever you create a profile group, the system assigns a new property with the same name as the profile group 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 group. For example, if you create a profile group called HighEarners for profiles of type Investor, the system gives every Investor profile a new property called HighEarners. If a profile fits the criteria for that group, the system sets the HighEarners property in that profile to “true.” If a profile does not fit the group criteria, the HighEarners property is set to “false.” The system uses this method to determine which profiles belong to each group.

To create a profile group:

1. Display the Targeting > Profile and Content Groups window, and click the New Group button in the toolbar. The Select New Group Type dialog box appears.
2. Click Create New Profile Group, and then click Next. The following dialog box appears:

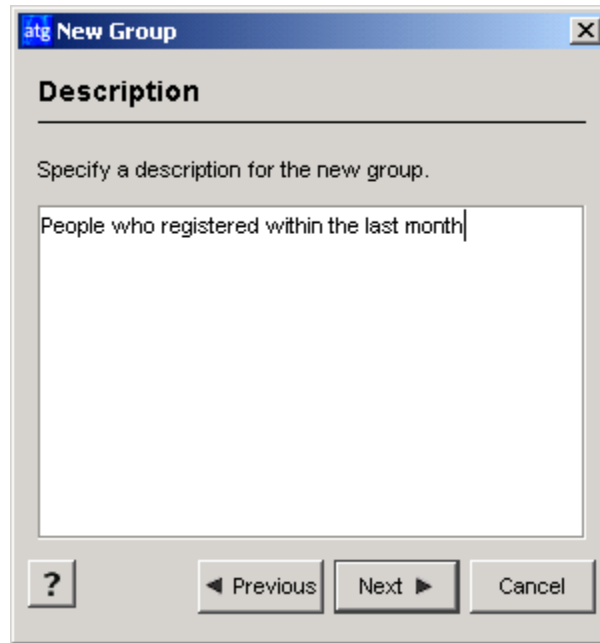


Specify the folder where you want to store this profile group and then type a name for the group. Do not include spaces in the name. Note that these folders are internal to the ATG Personalization module, which tracks them through an ATG-specific path called a Nucleus address (for more information on Nucleus, refer to the [ATG Programming Guide](#).) The address for a group folder is /atg/regi stry/Reposi toryGroups/<fol der name>. For example, the



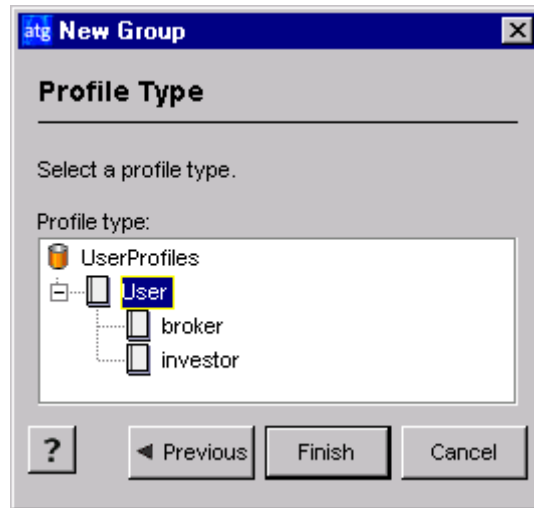
UserProfiles folder shown in the example is located at the Nucleus address /atg/registry/RepositoryGroups/UserProfiles. Any new folders you create will be located at a similar address.

3. Click Next. The following dialog box appears:



Type a brief description for this profile group. The text appears in the Description column in the Profile and Contents Group window. You can edit the description later if necessary.

4. Click Next. The following dialog box appears:



Select the profile type that corresponds to the visitors you want to belong to that group (assuming they meet the additional criteria you define). Using the example shown in the previous section, if you wanted all visitors to be able to qualify for a group called NewMembers, you would specify the base type of profile, Users. For a profile group called HighEarners that you knew would apply exclusively to visitors who were investors, you could specify the sub-type Investor as the profile type for that group. By constraining the potential membership of a profile group 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 new group.

5. Click Finish.

The Profile Group Definition window appears, allowing you to set up the rules that define the members of the group. For more information, see [Defining Profile Group Members](#).

Defining Profile Group Members

Each time you create a profile group, you need to set up a profile group definition that specifies the people you want to include in (or exclude from) the group. These definitions are made up of individual rule sets, each beginning with the phrase *"Include these people"* or *"Exclude these people."* A horizontal line separates multiple rule sets within a single definition. For examples, see the [Profile Group Definition Samples](#) section.

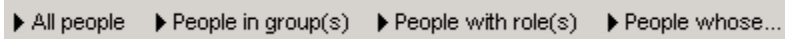
To create a profile group definition:

1. Select the profile group from the Profile and Content Groups window. The Profile Group Definition window appears.
2. Click Include or Exclude.
 - Use Include to specify the people you want to include in the group.



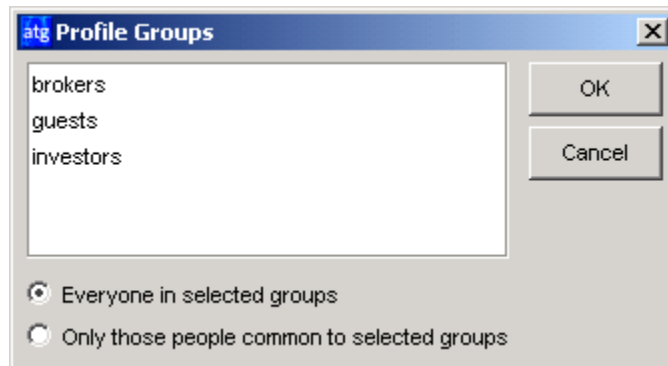
- Use Exclude to specify the people you do not want to include the group.

The beginning of the new rule set appears in the definition panel. For example, if you click Include, the phrase *“Include these people”* appears. The following button bar appears immediately below the rule text:



3. Specify the people you want to include or exclude:

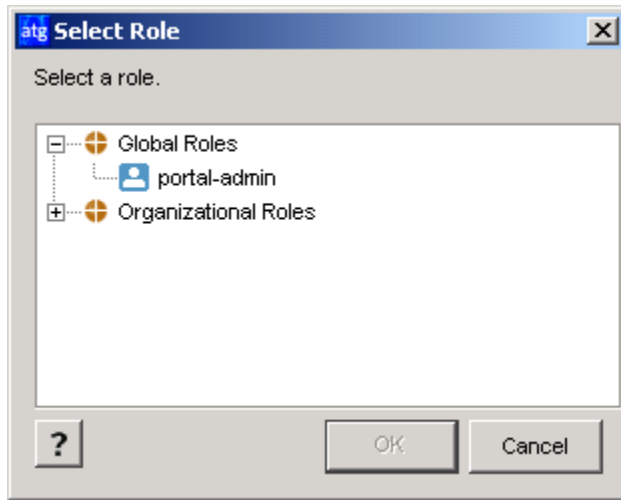
- Click All People if you want to include (or exclude) all visitors in the profile group.
- Click People in Group(s) if you want to include or exclude people from other existing profile groups. The Profile Groups dialog box appears as shown below, allowing you to choose from among the existing groups listed in the Profile Groups panel.



If multiple groups exist and you want to select more than one, hold down the Control key while making your selections. You can choose Everyone in Selected Groups or Only Those People Common to Selected Groups. When you click OK, a list of the groups you select appears at the bottom of the Profile Group Definition panel along with an Edit Groups button. Click this button if you need to change your group selections.

If you select People in Group(s), you can define additional criteria by clicking the Whose button (described later in this section).

- Click People with Role(s) if you want to include people assigned to specific global or organizational roles. When you select this option, the Select Role dialog box appears as shown below:



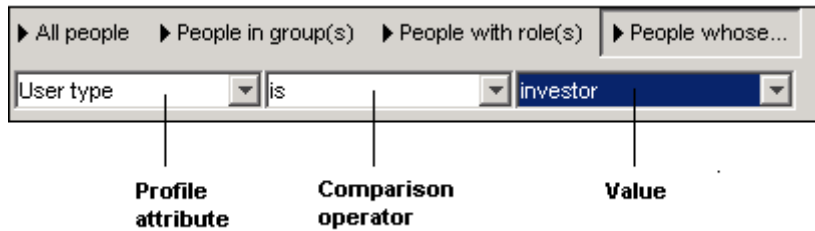
Use this dialog box to specify the role or roles you want to include in this profile group. If you specify more than one role, for example Role A and Role B, the profile group will include anyone who is assigned to either Role A or Role B (the equivalent of the Everyone in Selected Groups option described above). It is not limited to those people who are assigned both roles.

Similarly, if you create a group that includes a role and another profile group, for example Role A and Profile Group B, the group will include everyone who is assigned Role A or is a member of Profile Group B.

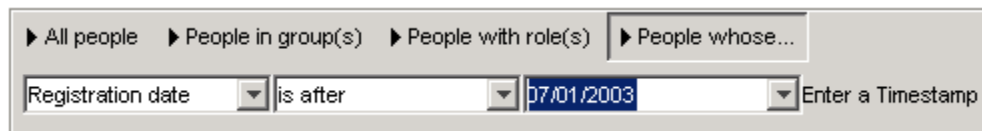
If you do require “and” instead of “or” behavior for groups that include more than one role, create the rule set by hand rather than through the ATG Control Center. For more information, see *Creating a Rule Set for a Profile Group that Includes Roles* in the *ATG Personalization Programming Guide*.

Note that using roles to define profile groups gives you a way to use roles in content targeters or scenarios. Create a profile group that includes specific roles, and then include that profile group in the targeter or scenario.

- Click People Whose (or Whose if you selected the People in Group(s) option described above) if you want to include or exclude people based on specific profile properties. When you select this option, several drop-down lists appear as shown below, allowing you to select the 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 Web site. (For more information, refer to *Setting Up a Profile Repository* in the [ATG Personalization Programming Guide](#).) 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 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. The required value type ("string" or "timestamp," for example) appears next to the text field.



4. If you want to add other condition statements to the rule, click the **And Whose** or the **Or Whose** buttons at the bottom of the Profile Group Definition window. For examples, see the [Profile Group Definition Samples](#) section.
5. 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 step 3.
6. Select File > Save when all your definition rules are set. Note that if you view a different switch windows without saving, the ATG Control Center automatically saves your changes.

Important: After you create or edit profile groups in the ATG Control Center, you must copy your changes from the staging server to your live site. For more information, see *Copying and Switching Databases* in the [ATG Installation and Configuration Guide](#).

Deleting a Rule in a Profile Group Definition

If you need to delete any of the rules you set up for a profile group, do the following:

1. In the Profile Group Definition window, select the part of the definition you want to delete.
 - If you want to delete the entire definition, choose Edit > Select Entire Rule Set.



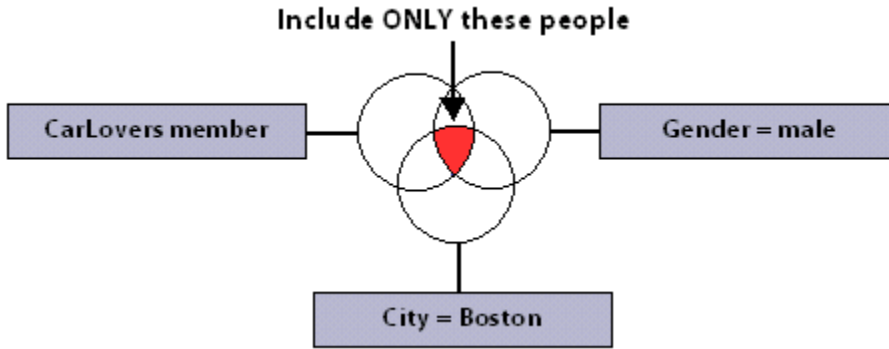
- If you want to delete an entire rule within the definition, click on the first line of the rule (I nclude these peopl e: , for example) or choose Edit > Select Entire Rule.
 - If you want to delete a specific line within a rule, click on just that line.
2. Select Edit > Delete.
 3. Select File > Save.

Profile Group Definition Samples

There are countless ways to combine profile group options to specify the people you want to include or exclude from certain groups. Profile group definitions are based on Boolean (“and/or”) logic, meaning that you can use **AND** statements and **OR** statements to create more sophisticated inclusion and exclusion rules. AND statements let you include (or exclude) people who meet *all conditions* in the profile group definition. OR statements let you include (or exclude) people who meet *any of the conditions* in the profile group definition. The following samples show how these subtle changes in the wording of a definition can change a group’s makeup completely.

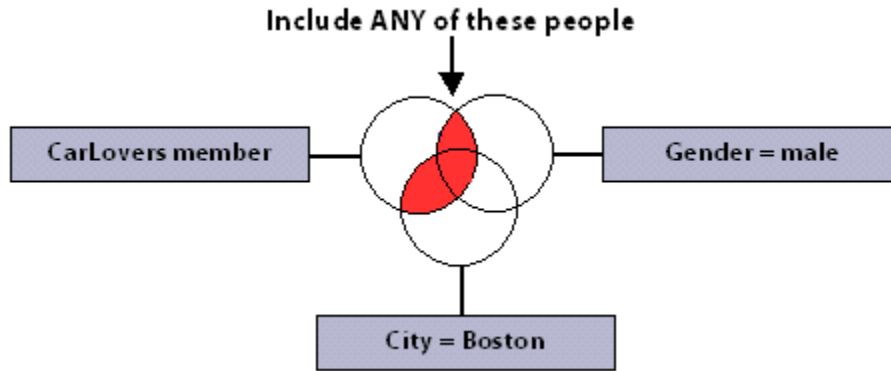
Sample 1: All people in the profile group called CarLovers who are (a) from Boston **AND** (b) male:

Include these people:
 people in group CarLovers
 whose Home address.city is Boston
 and whose Gender is male



Sample 2: All people in the profile group called CarLovers who are (a) from Boston **OR** (b) male:

Include these people:
 people in group CarLovers
 whose Home address.city is Boston
 or whose Gender is male

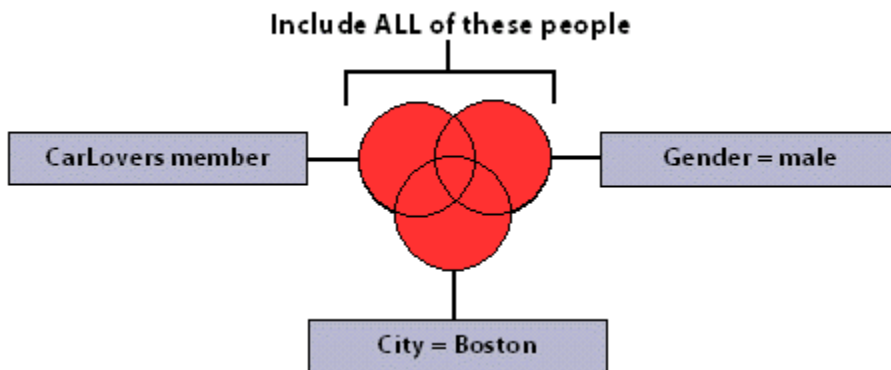


Sample 3: All people in the profile group called CarLovers **PLUS** all people from Boston **PLUS** all male users.

Include these people:
 people in group CarLovers

 Include these people:
 people whose Home address.city is Boston

 Include these people:
 people whose Gender is male



Moving or Renaming Profile Groups

Important: When you rename a profile group, you must update all references you've made to it in other ATG Control Center windows. For example, if the group is referenced by a content targeter, be sure to update the targeting rules in the Content Targeters window. (For details, see the [Setting Up Targeting Business Rules](#) section.) Otherwise, the targeter will continue to refer to the old group name and errors will occur whenever it is invoked on the Web site.



To rename an existing profile group or move it to another folder:

1. Select the profile group in the Profile and Content Groups window.
2. Select File > Move/Rename Group. (**Note:** You cannot move or rename a group that is currently open in the ATG Control Center. To close the group, navigate to it by using the arrow buttons in the toolbar, and then select File > Close.)

The Rename Group dialog box appears.

3. To move the group to a different folder, select the destination folder from the list at the top of the dialog box. To rename the group, type the new name (do not include spaces). Note that these folders are internal to the ATG Personalization module; for more information, see [Creating New Profile Groups](#).
4. Click OK.

Editing Profile Group Descriptions

The Description column in the Profile and Content Groups window displays a description of each profile group. To edit the description:

1. Select the group from the Profile and Content Groups window. (To select a group without opening it, click any column other than the Name column.)
2. Select File > Edit Description. The Edit Description dialog box opens.
3. Type the new description for the group and click OK.

Deleting Profile Groups

You can delete profile groups that you no longer need. Doing so only removes the group name, description, and definitions from the ATG Control Center; it does not affect the profiles of any group members.

Important: When you delete a profile group, you must delete all references you've made to it in other ATG Control Center windows. For example, if the group is referenced by a content targeter, be sure to edit the targeting rules in the Content Targeters window. (For details, see the [Setting Up Targeting Business Rules](#) section.) Otherwise, the targeter will continue to refer to the deleted group and errors will occur whenever it is invoked on the Web site.

To delete an existing profile group:

1. If the group you want to delete is open, navigate to the group's window by using the arrow buttons on the toolbar, and then close it by selecting File > Close.
2. Select the profile group from the Profile and Content Groups window. (To select a group without opening it, click any column other than the Name column.)
3. Select File > Delete Group.



4. When the confirmation dialog box appears, click Yes to confirm the deletion.

Copying Profile Groups to the Live Site

After you create or edit profile groups in the ATG Control Center, you must copy your changes from the staging server to the live site. For more information, see *Copying and Switching Databases* in the [ATG Installation and Configuration Guide](#).





5 Setting Up Content Items

A **content item** is a single piece of information available for display on your Web site, such as a press release, a mutual fund prospectus, or an image of a product. Each content item has certain properties, usually determined by the author or content administrator, that describe its characteristics. For example, a mutual fund prospectus might have a content property called `LastModified` with a value of "04/16/2000."

All the content items for your site are stored in searchable content repositories. These repositories are typically set up by the application developers working on your Web site. (For more information on how content repositories work, see the [ATG Repository Guide](#).) Your site may also be set up to access content stored in a third-party content management system from another commercial vendor.

As stated above, the properties for your content items are usually specified by the content administrator or the person who initially adds each content item to its repository. In some cases, however, you might want to edit one or more properties, for example in preparation for putting similar content items into groups (explained in the next chapter, [Creating Content Groups](#)). The process of editing content properties, sometimes called "tagging" content, is explained in this chapter, along with other basic procedures for managing content repositories.

Note: If your ATG installation uses ATG Content Administration, you can also use the ATG Business Control Center to create and manage content items. For more information, refer to the [ATG Content Administration Guide for Business Users](#).

Using the Content Repository Editor Window

The Content menu includes all the content repositories (if any) that you can access through the ATG Control Center. If you have installed the Quincy Funds demo, the content repositories you see in the list include Investment Tips, Funds, Images, and Features. When you click on a repository in this list, the repository editor opens on the right side of the window. This editor lets you view, add and delete content items and edit their property values.

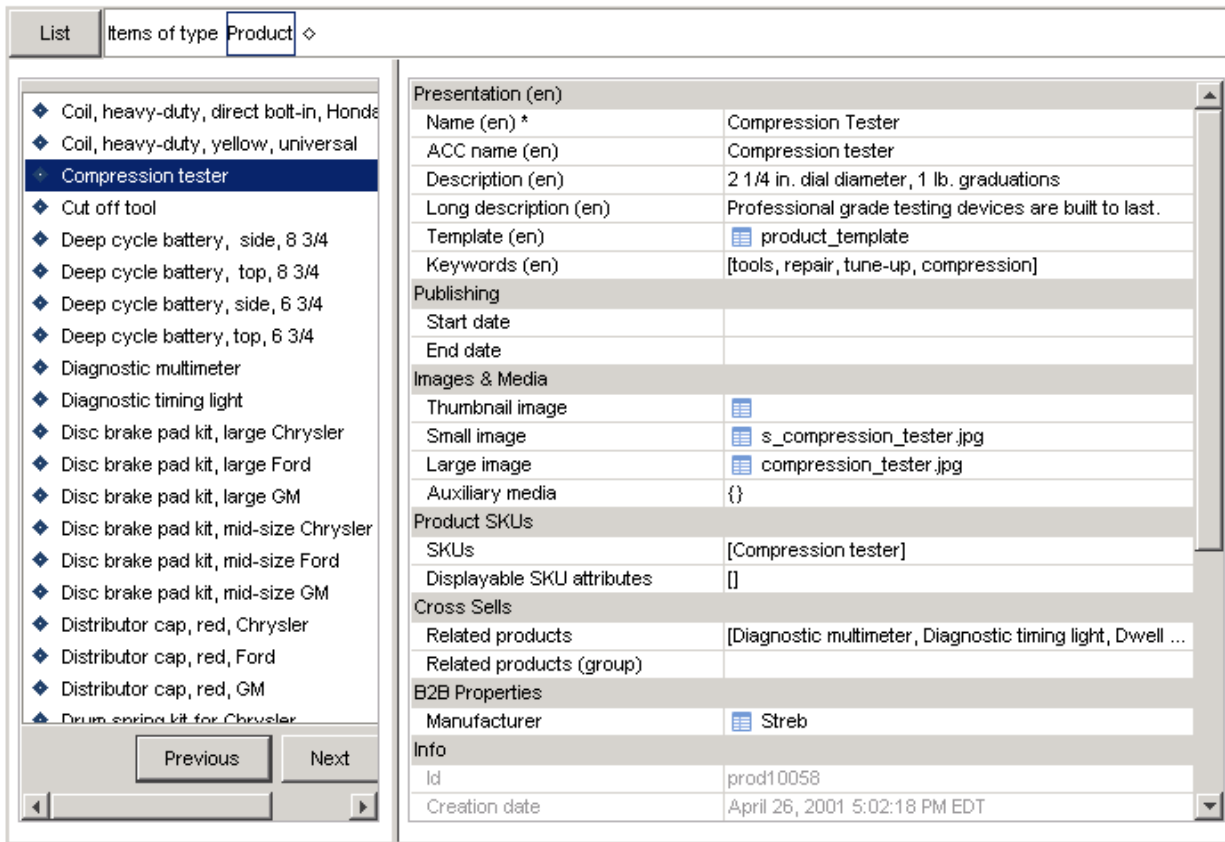
Note that, in some cases, you can view content items but you may not be able to edit their property values. This behavior depends on one of the following:

- Your access rights to individual items or the folders in which they are located. See [Security Access in the ATG Control Center](#) for more information.
- The type of repository in which the content item is stored. For example, if your site uses a hybrid SQL/file system content repository, you may be able to view the items in

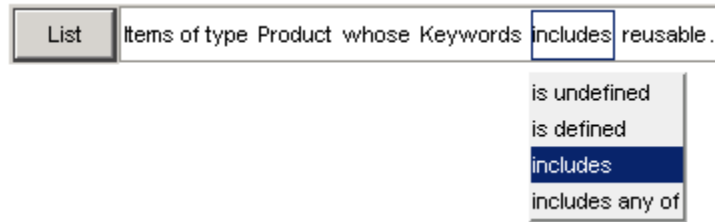
the ATG Control Center but not edit them directly. (The Quincy Funds demo uses this type of configuration.)

Values that you cannot edit appear in gray in the repository editor window.

The following illustration shows the content repository editor window, in this case for the Products repository in the ATG Commerce Motorprise demo:



Use the search bar at the top of the window to specify and display the content items you want to work with.



Click each part of the editor (including the diamonds) and specify the option you want from the menu that appears. Then click List. The system shows all the items in the repository that meet your criteria. For detailed information on using the search bar, please refer to the online help for the ATG Control Center.

Adding New Content Items to a Repository

The following procedure shows how to add a new item to a content repository.

1. Select the repository to which you want to add the new item. (For example, if you were adding content to the Investment Tips repository in the Quincy Funds demo, you would select Content > Investment Tips.)
2. For repositories that can hold more than one type of item, change the search criteria at the top of the window to show the type of item you want to add. (The types of items in a repository correspond to the different item descriptors in the repository definition file. For more information, refer to the *SQL Repositories* chapter in the [ATG Repository Guide](#).) You perform this step so that the File > New Item menu option, which you select next, displays the New Item dialog box that is appropriate for the type of item you are adding.

After you change the search criteria, you can click List to display existing items of this type. This part of the step is optional.

3. Select File > New Item. The New Item dialog box appears, with a form showing the properties you can supply for this item. The properties vary depending on the content repository you are working with and on the specific properties that your company defined for this type of item when it set up the repository.
4. Fill in the properties as needed. Required properties have an asterisk next to their names. For more information, see [Editing Content Property Values](#).
5. Click OK when you have finished.

For information on adding a completely new content repository to the system, please refer to the [ATG Repository Guide](#).

Editing Content Property Values

To change the property values of an existing content item, do the following:



1. Display the item whose property values you want to change. See [Using the Content Repository Editor Window](#) for more information.
2. Change the properties as needed. The technique you use depends on the type of property you are editing. For some, you type the value directly into the field next to the property's name. For others, a button appears when you click the value field, and you then click the button to display an edit box or to select from a list of predefined values.

Also note the following about filling in properties:

- Required properties have an asterisk next to their names.
- Read-only properties are displayed in gray. You cannot edit their values. See [Using the Content Repository Editor Window](#) for more information.
- Some property fields contain a small black arrow: ➤ This symbol indicates that the value is linked to another item type in the repository. Click the arrow. Then click the "..." button to open a search dialog box where you can select or create new repository items of that type.

For information on how to edit properties that can have multiple values, see [Filling in Properties with Multiple Values](#).

3. Select File > Save when you have finished editing property values.

Filling in Properties with Multiple Values

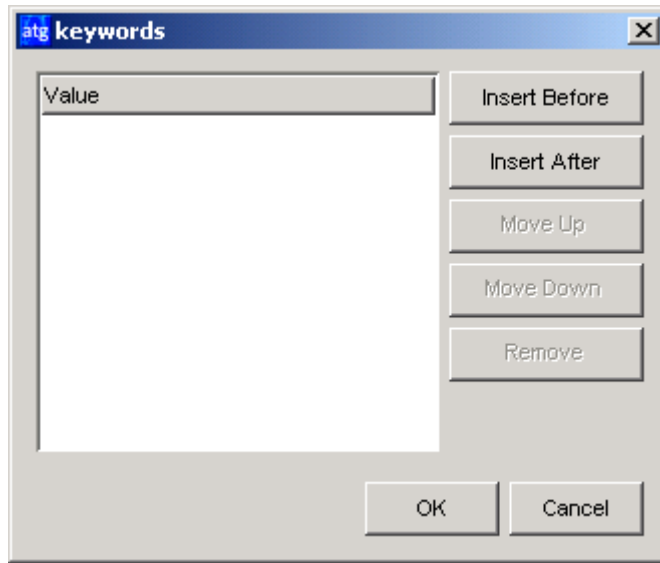
Some properties can have more than one value (sometimes called an array of values). In the Offers content repository (Quincy Funds demo), the keywords property is an example:



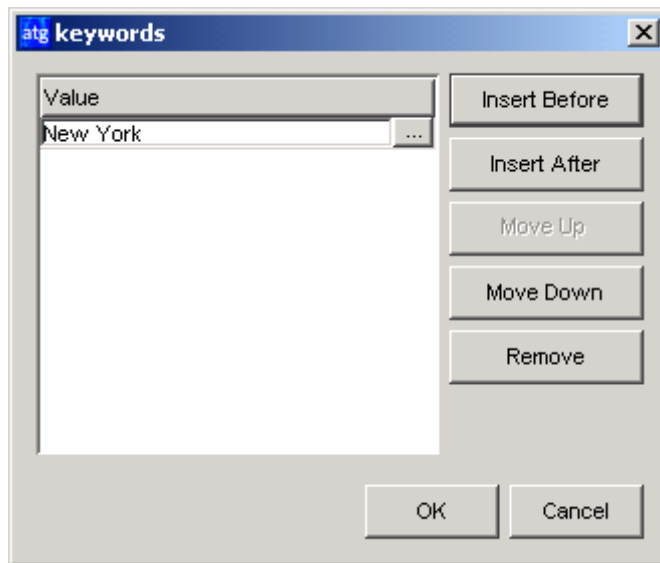
To edit this type of property, click the Value field so that a button appears, as follows:



When you click the button, an edit dialog box appears:

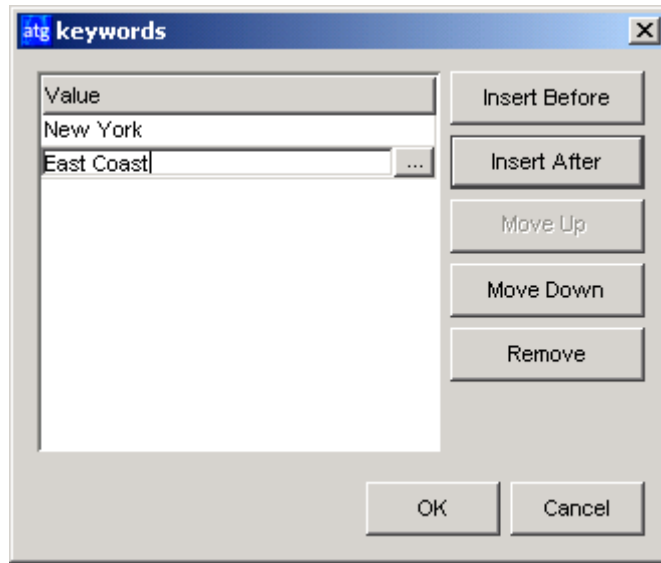


To add a new value, click Insert Before. An empty line appears into which you type the value you want:



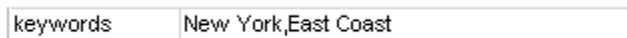
To edit an existing value, click its line to make it active and then edit the text as required.

To add another value, click Insert After. Another line appears after the first. Type the second value into the new line.



Add more values as required, making sure that each line contains only one value. If necessary, use the Move Up and Move Down buttons to reorder the lines.

When you have finished, click OK. The set of values appears, separated by commas:



Deleting Content Items

To delete a content item from a repository, do the following:

1. Display the item you want to delete. For more information, see [Using the Content Repository Editor Window](#).
2. Select the item by clicking its name in the list.
3. Select File > Delete Item and click Yes when the confirmation dialog box appears.

Note: After you delete an item, make sure you also remove any references to it that you may have set up elsewhere in the system. For example, check your scenarios for references to the deleted item in Event elements such as the Views element.



6 Creating 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:

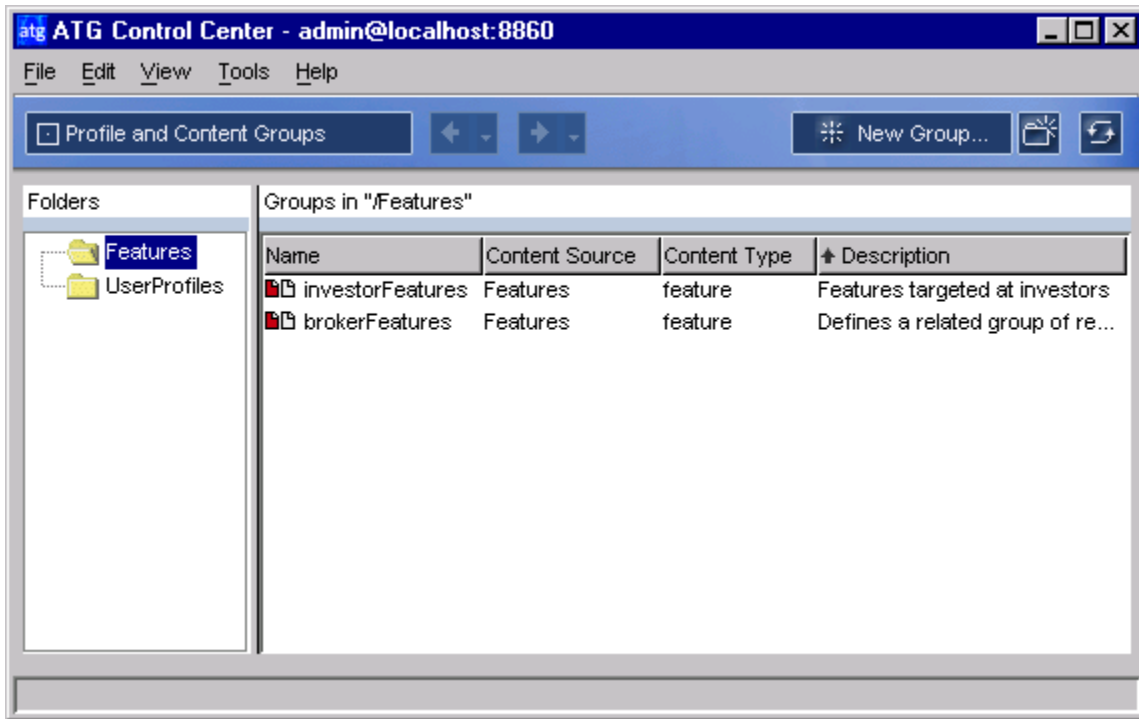
```
Show this content:  
  items in group NewNYInfo  
to these people:  
  people whose Registration date is after 03/31/2004
```

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.

Important: If your ATG installation uses ATG Content Administration, it is strongly recommended that you use the ATG Business Control Center instead of the ACC to manage content groups. In addition, if you are working in a multisite ATG environment (one in which a single instance of ATG products supports more than one Web site), you cannot create or edit site-aware content groups in the ACC. These must be managed through the ATG Business Control Center. For more information, refer to the [ATG Business Control Center User's Guide](#). For information on a multisite environment, refer to the [ATG Multisite Administration Guide](#).


Viewing Content Groups

You can view a list of existing content groups through the Profile and Content Groups window in the ATG Control Center. To display this window, select Targeting > Profile and Content Groups.



Targeting > Profile and Content Groups window

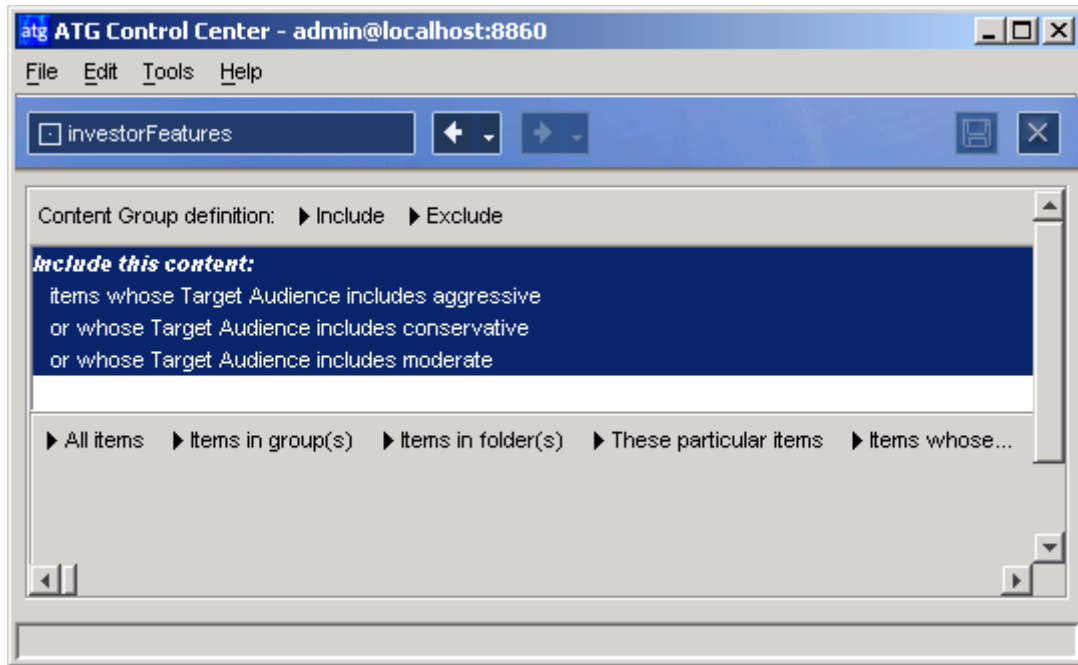
The window has the following features:

- The panel on the left shows a list of folders containing the profile or content groups that have already been created for your Web site. Content groups are identified by the  icon.
- The panel on the right panel shows all content groups in the selected folder. You can add new groups to this list by clicking the New Group button on the toolbar. For more information, see [Creating New Content Groups](#).
- The Name column shows the name of each group in the selected folder. Note that the arrow next to the column title shows how groups are sorted in this list; in this example, the content groups are sorted in reverse alphabetical order by their entry in the Description column. Clicking the column title reverses the sort order.
- The Content Source column shows the name of the content repository that stores the items included in this group. (**Note:** Content repositories are typically set up by the application developers working on your Web site. For more information on how repositories are created, refer to the [ATG Repository Guide](#).)
- The Content Type column shows the specific subset of items in the repository to which the content items in this group must belong. (The subset is often used elsewhere in the product for organizational or querying purposes.)



- The Description column displays a brief description of each group. If the column is too narrow to display all the text, hold the mouse pointer over a description that you want to read. The description text appears in a blue box.

To display the rules that define the items that are included in a given content group, click the group's name in the Name column. The following window appears:



Content Group Definition window

The window has the following features:

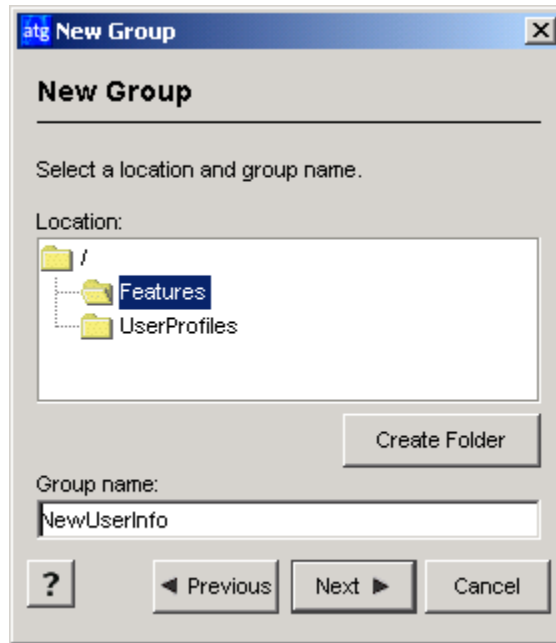
- Include and Exclude buttons, which allow you to add rules that include or exclude specific content items from this group; for example, you could set up a rule that includes any item whose author is “M. Hamilton” or a rule that excludes any item created before January 1, 2003.
- A blue definition panel that shows the rules for this content group.
- A series of buttons (All Items, Items in Group(s), Items in Folder(s), These Particular Items, Items Whose...) that you use to define the rule selected in the definition panel. Note that more buttons become available as you edit the rule.

Creating New Content Groups

To create a content group:



1. Display the Targeting > Profile and Content Groups window, and click the New Group button in the toolbar. The Select New Group Type dialog box appears.
2. Click Create New Content Group, and then click Next. The following dialog box appears:



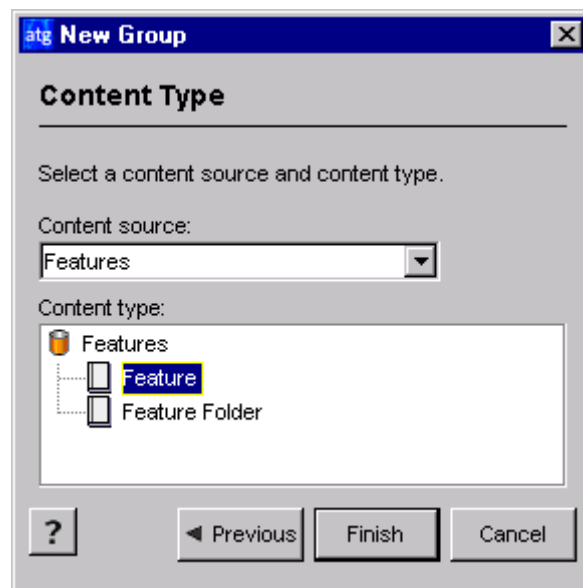
Specify the folder where you want to store this content group and then type a name for the group. Do not include spaces in the name. Note that these folders are internal to the ATG Personalization module, which tracks them through an ATG-specific path called a Nucleus address (for more information on Nucleus, refer to the [ATG Programming Guide](#).) The address for a group folder is `/atg/registry/RepositoryGroups/<folder name>`. For example, the Features folder shown in the example is located at the Nucleus address `/atg/registry/RepositoryGroups/Features`. Any new folders you create will be located at a similar address.

3. Click Next. The following dialog box appears:



Type a brief description for this content group. The text appears in the Description column in the Profile and Contents Group window. You can edit the description later if necessary.

4. Click Next. The following dialog box appears:



Select a repository from the Content Source drop-down list. The repository you select determines the content type, items, and content properties you can choose to include in or exclude from this group.

Select the content type that corresponds to the items you want to include in or exclude from this group (assuming they meet the additional criteria you define).

5. Click Finish.



The Content Group Definition window appears, allowing you to set up the rules that define the items that make up the group. For more information, see the next section, [Setting Up Content Group Definitions](#).

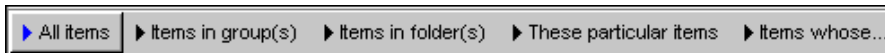
Setting Up Content Group Definitions

Each time you add a new content group, you need to define the content items that it will include. These definitions are made up of individual rule sets, each beginning with the phrase *“Include this content”* or *“Exclude this content”*. A horizontal line separates multiple rule sets within a definition. For examples, see the [Content Group Definition Samples](#) section.

To define the items in a content group:

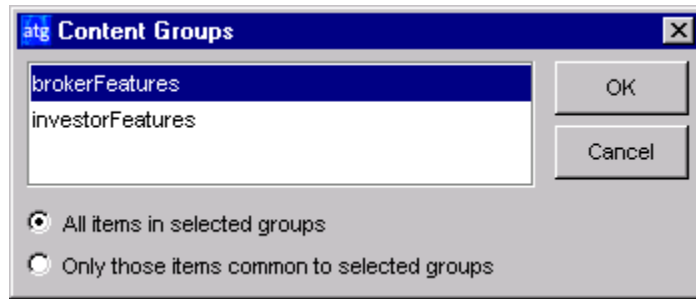
1. Select the group from the Profile and Content Groups window. The Content Group Definition window appears.
2. Click Include or Exclude at the top of the Content Group Definition window.
 - Use Include to define the content group by the content you want to include.
 - Use Exclude to define the content group by the content you want to exclude.

The beginning of the new rule appears in the Content Group Definition panel. For example, if you click **Include**, the phrase *“Include this content”* appears. The following button bar appears immediately below the rule text:



Note: You may have to resize the window in order to see all the options.

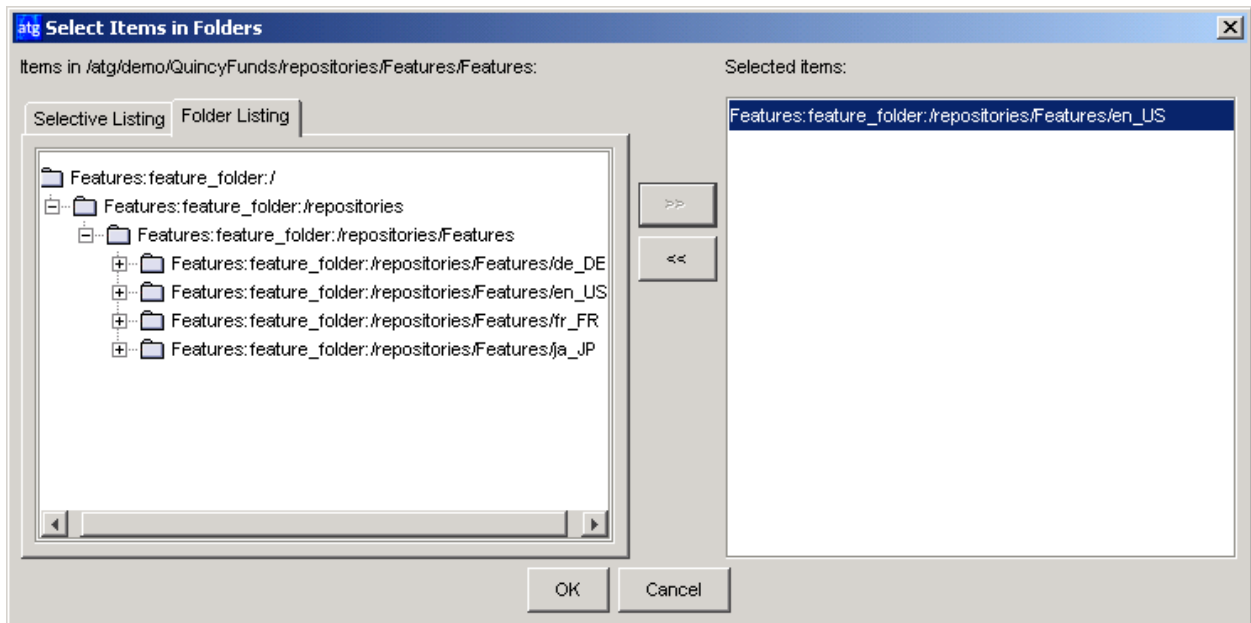
3. Specify the content you want to include or exclude:
 - Click All Items if you want to include (or exclude) all content items stored in the selected repository. (To see the items that this repository holds, select the name of the repository from the Content menu in the main ATG Control Center window, and then display all items.)
 - Click Items in Group(s) if you want to include or exclude items from other existing content groups. The Content Groups dialog box appears as shown below, allowing you to choose from among the existing groups listed in the Content Groups panel.



If multiple groups exist and you want to select more than one, hold down the Control key while making your selections. You can choose All Items in Selected Groups or Only Those Items Common to Selected Groups. When you click OK, a list of the groups you select appears at the bottom of the Content Group Definition panel along with an Edit Groups button. Click this button if you need to change your group selections.

If you select the Items in Group(s) option, you can define additional criteria by clicking the Whose button (described below).

- Click Items in Folder(s) if you want to include or exclude all items from specific repository folders. The Select Items in Folders dialog box appears.



Select the folders containing the content you want to use, and then click the >> button to move them to the Selected Items list on the right. Click OK when you complete your selections.

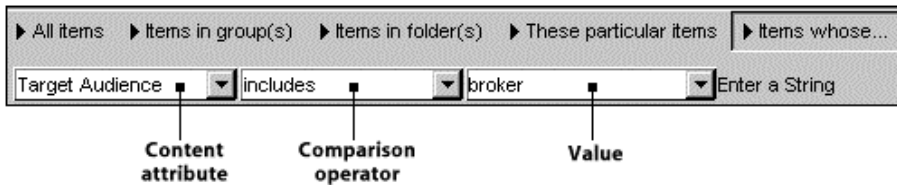
You can then define additional criteria by clicking the Whose button (described below).



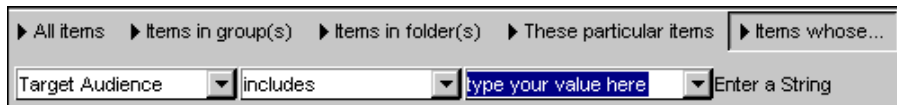
- Click These Particular Items if you want to include or exclude specific items from the repository. When the Select Items dialog box (similar to the dialog box shown above) opens, select the individual content items you want to use and click the >> button to move them to the Selected Items list on the right. Click OK when you have completed your selections.

You can then define additional criteria by clicking the Whose button (described below).

- Click Items Whose (or Whose if you clicked the Items in Groups(s), Items in Folder(s), or These Particular Items options) if you want to include or exclude items based on specific content properties. When you select this option, several drop-down lists appear as shown below, 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 in. The selections in the 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. The required value type ("string," for example) appears next to the text field.



4. If you want to add other condition statements to the rule, click the And Whose and Or Whose buttons at the bottom of the Content Group Definition panel. For examples, see the [Content Group Definition Samples](#) section.
5. 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 step 3.
6. Click Save when all your definition rules are set. **Note:** If you select another content group from the Content Groups panel or switch to another task window before saving your changes, the ATG Control Center saves them automatically.

Important: After you add new content groups to a repository, you must copy your changes from the staging server to your live site. For more information, see *Copying and Switching Databases* in the [ATG Installation and Configuration Guide](#).



Deleting Content Group Definitions

To delete all or part of a content group definition:

1. In the Content Group Definition panel, select the part of the definition you want to delete.
 - If you want to delete the entire definition, choose Edit > Select Entire Rule Set.
 - If you want to delete an entire rule within the definition, click on the first line of the rule (I ncl ude thi s content: , for example) or choose Edit > Select Entire Rule.
 - If you want to delete a specific line within a rule, click on just that line.
2. Select Edit > Delete.
3. Select File > Save.

Content Group Definition Samples

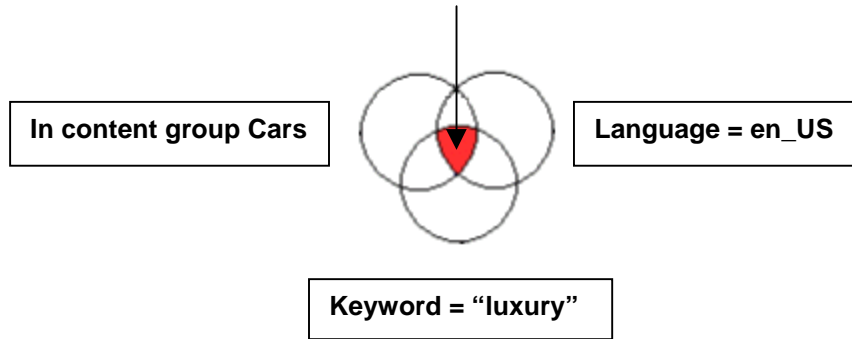
There are countless ways to combine content group options to specify the content you want to include or exclude from certain groups. Content group definitions are based on Boolean (“and/or”) logic, meaning that you can use **AND** statements and **OR** statements to create more sophisticated inclusion and exclusion rules. AND statements let you include (or exclude) content items that meet *all conditions* in the definition. OR statements let you include (or exclude) content items that meet *any of the conditions* in the definition. The following samples show how these subtle changes in the wording of a definition can change a content group’s makeup completely.

Sample 1: All items in the content group *Cars* that (a) include the keyword “luxury” **AND** (b) have US English as their language:

```
Incl ude thi s content:  
i tems i n group Cars  
whose keywords i ncl udes Luxury  
and whose Language i s en_US
```



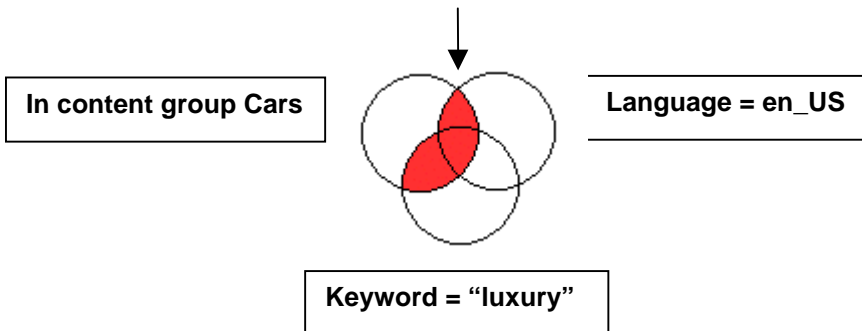
Include **ONLY** these content items



Sample 2: All items in the content group *Cars* that (a) include the keyword “luxury” **OR** (b) have US English as their language:

Include this content:
 items in group Cars
 whose keywords includes luxury
 or whose Language is en_US

Include **ANY** of these content items

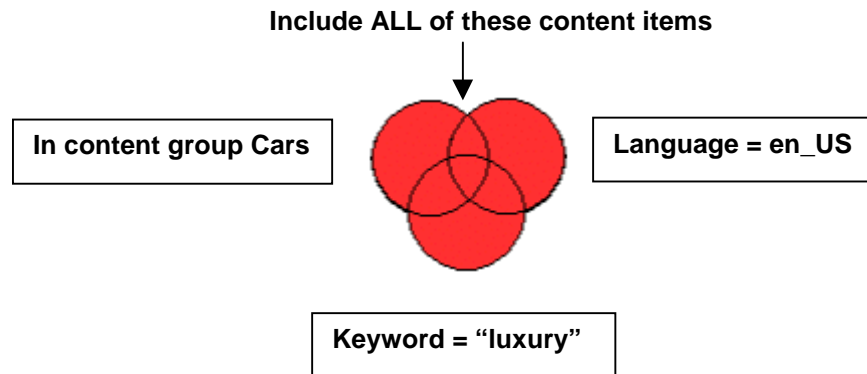


Sample 3: All content items in the content group *Cars* **PLUS** all content in US English **PLUS** all content that contains the keyword luxury:

Include this content:
 items in group Cars

 Include this content:
 whose Language is en_US

 Include this content:
 whose keywords includes luxury



Moving or Renaming Content Groups

Important: When you rename a content group, you must update all references you've made to it in other ATG Control Center windows. For example, if the group is referenced by a content targeter, be sure to update the targeting rules in the Content Targeters window. (For details, see the [Setting Up Targeting Business Rules](#) section.) Otherwise, the targeter will continue to refer to the old group name and errors will occur whenever it is invoked on the Web site.

To rename an existing content group or move it to another folder:

1. Select the content group in the Profile and Content Groups window.
2. Select File > Move/Rename Group. (**Note:** You cannot move or rename a group that is currently open in the ATG Control Center. To close the group, navigate to it by using the arrow buttons in the toolbar, and then select File > Close.)

The Rename Content Group dialog box appears.

3. To move the group to a different folder, select the destination folder from the list at the top of the dialog box. To rename the group, type the new name (do not include spaces). Note that these folders are internal to the ATG Personalization module; for more information, see [Creating New Content Groups](#).
4. Click OK.

Editing Content Group Descriptions

The Description column in the Profile and Content Groups window displays a description of each content group. To edit the description:

1. Select the group from the Profile and Content Groups window. (To select a group without opening it, click any column other than the Name column.)
2. Select File > Edit Description. The Edit Description dialog box opens.



3. Type the new description for the group and click OK.

Deleting Content Groups

You can delete content groups that you no longer need. Doing so only removes the group name, description, and definitions from the ATG Control Center; it does not affect the content items within the group.

Important: When you delete a content group, you must delete all references you've made to it in other ATG Control Center windows. For example, if the group is referenced by a content targeter, be sure to edit the targeting rules in the Content Targeters window. (For details, see the [Setting Up Targeting Business Rules](#) section.) Otherwise, the targeter will continue to refer to the deleted group and errors will occur whenever it is invoked on the Web site.

To delete an existing content group:

1. If the group you want to delete is open, navigate to the group's window by using the arrow buttons on the toolbar, and then close it by selecting File > Close.
2. Select the content group from the Profile and Content Groups window. (To select a group without opening it, click any column other than the Name column.)
3. Select File > Delete Group.
4. When the confirmation dialog box appears, click Yes to confirm the deletion.

Copying Content Groups to the Live Site

After you create or edit content groups in the ATG Control Center, you must copy your changes from the staging server to the live site. For more information, see *Copying and Switching Databases* in the [ATG Installation and Configuration Guide](#).



7 Matching Content with Your Target Audiences

After you have set up profile groups and content groups, you need to tell the system which content groups to show to whom and the circumstances in which to do it. One way to do this is by setting up **content targeters**, which are business rules that you create through the Targeting > Content Targeters window in the ATG Control Center. Content targeters define the content that you display to each profile group.

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, let's say you wanted to show new feature articles (in a content group called `newMemberFeatures`) to registered site users (in a profile group called `registeredMembers`) every Monday. In this case, you might create a targeter called `newFeatures` with the following rule set:

```
Show this content:  
  items in group newMemberFeatures  
to these people:  
  people in group registeredMembers  
at these times:  
  every Mon 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 visitor's profile is set to "true" (the people condition). If this or any other condition fails, the targeter completely ignores the rule set. If the condition passes, it goes on to see if the current day is a 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 visitor 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](#).) Once the targeter is in place, you can use Targeting > Preview window to test it on the staging site before moving it to your live server.

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`) of the Quincy Funds demo.



Important: If your ATG installation uses ATG Content Administration, it is strongly recommended that you use the ATG Business Control Center instead of the ACC to manage content targeters. In addition, if you are working in a multisite ATG environment (one in which a single instance of ATG products supports more than one Web site), you cannot create or edit site-aware content targeters in the ACC. These must be managed through the ATG Business Control Center. For more information, refer to the [ATG Business Control Center User's Guide](#). For information on a multisite environment, refer to the [ATG Multisite Administration Guide](#).

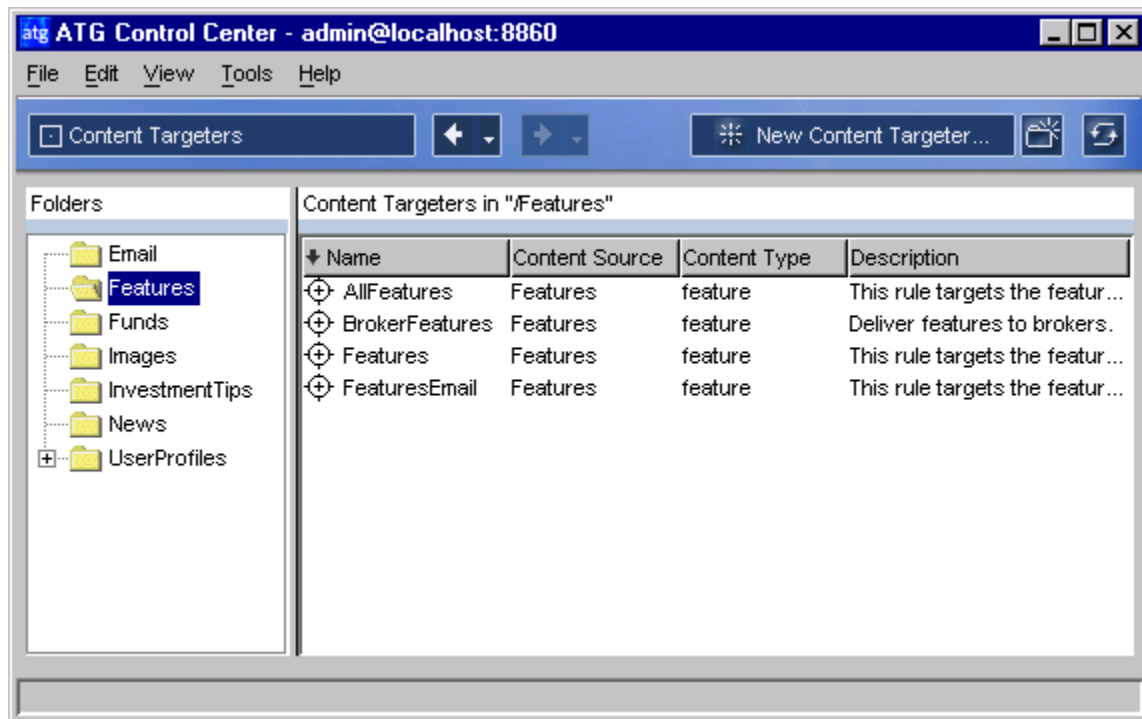
Using Scenarios to Match Content to Profiles

If you use the Scenarios module, you can match content to profile groups 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. For information on the differences between the two, see [How Are Scenarios Different from Targeters?](#).


The rest of this chapter describes using targeters to match content to profile groups. For information on using scenarios, see [Creating Scenarios](#).

Using the Content Targeters Window

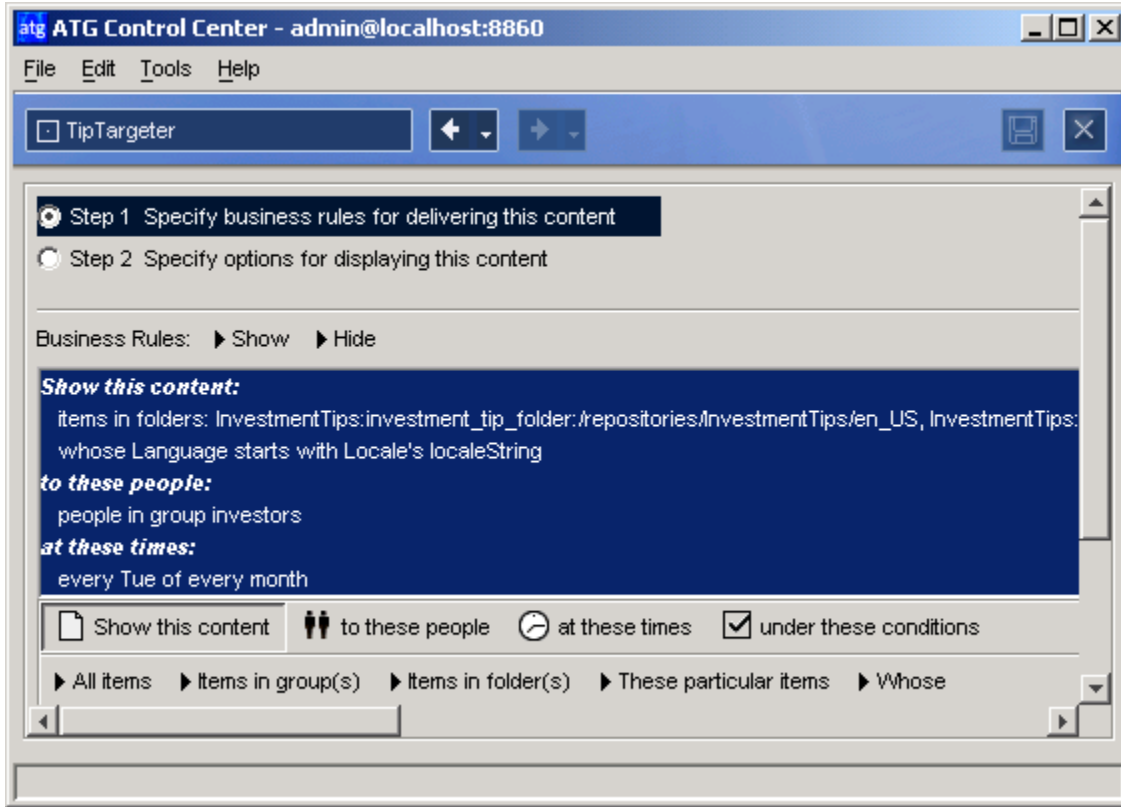
To open the Content Targeters window, select Targeting from the main ATG Control Center window, and then select Content Targeters. The following window appears:



Targeting > Content Targeters window

- The panel on the left shows a list of folders containing the content targeters that have been created for your Web site.
- The panel on the right shows all the content targeters (identified by the  icon) in the selected folder. You can add new targeters by clicking the New Content Targeter button in the toolbar. (See the [Adding New Content Targeters](#) section for more information.)
- The Name column shows the name of each targeter in the selected folder. Note that the arrow next to the column title shows how targeters are sorted in this list; in this example, targeters are sorted alphabetically by their entry in the Name column. Clicking the column title reverses the sort order.
- The Content Source column shows the name of the repository containing the content that will be delivered by this targeter. (A single targeter can deliver content from one repository only.)
- The Content Type column shows the specific subset of items in the repository to which the targeters in this group must belong. (The subset is often used elsewhere in the product for organizational or querying purposes.)
- The Description column displays a brief description of each targeter. If the column is too narrow to display all the text, hold the mouse pointer over a description that you want to read. The description text appears in a blue box.

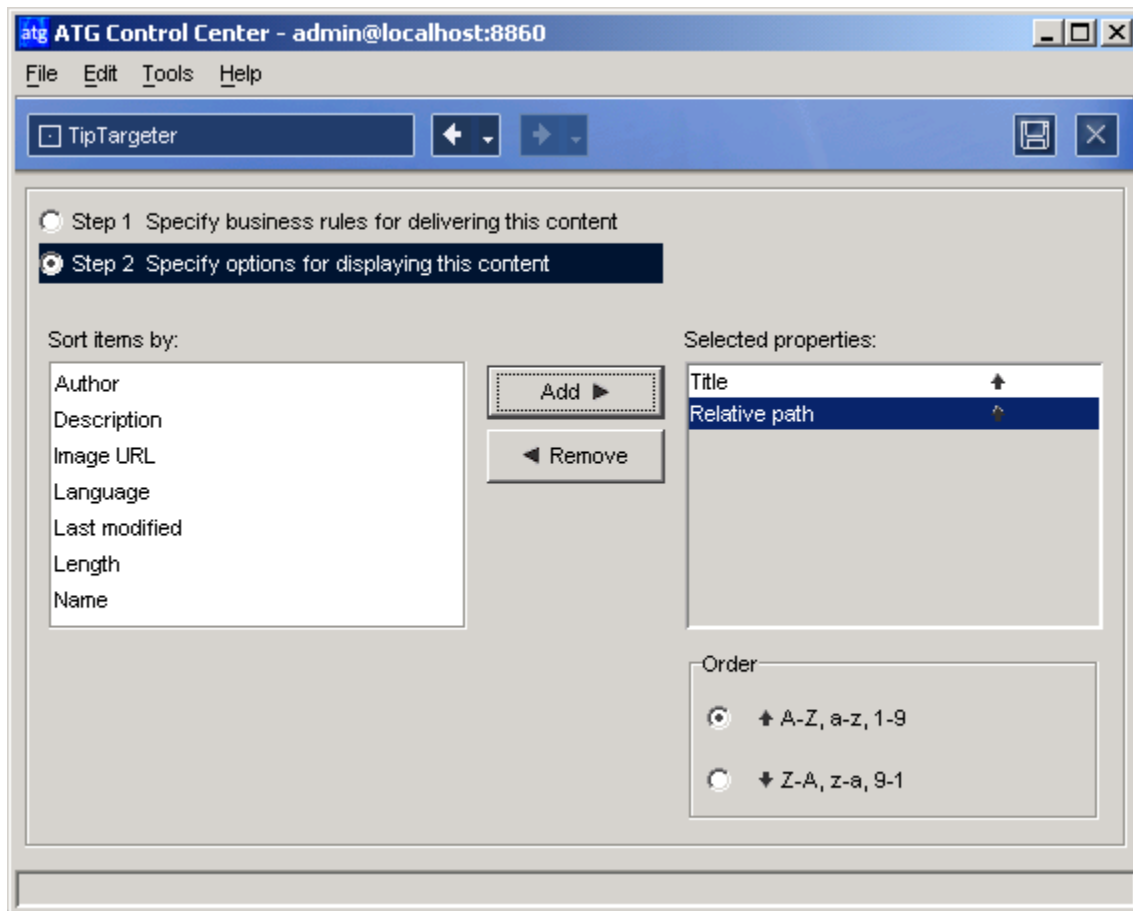
To display the rules that make up a given targeter, click the targeter's name in the Name column. The following window appears:



- The Business Rules panel lets you define the circumstances under which this targeter displays content items to your Web site visitors. For more information, see the [Setting Up Targeting Business Rules](#) section.

Note: The various drop-down lists and options that appear in the Business Rules panel change as you build your targeting rules.

When you click **Step 2 Specify options for displaying this content**, the features of the window change as shown below, allowing you to sort the targeting results by certain content properties. **Note:** This is an optional step in the targeter creation process. For more information, see the [Sorting Targeting Results](#) section.



- The Sort Items By list shows you the properties you can use for sorting. The properties that appear in this list vary depending on the selected targeter's repository.
- The Selected Properties list on the right displays the properties you select for sorting. Use the Add and Remove buttons to edit this list.
- The Order buttons in the lower right corner let you switch between ascending (A-Z, 1-9) or descending (Z-A, 9-1) sort order for each property in the Selected Properties list.

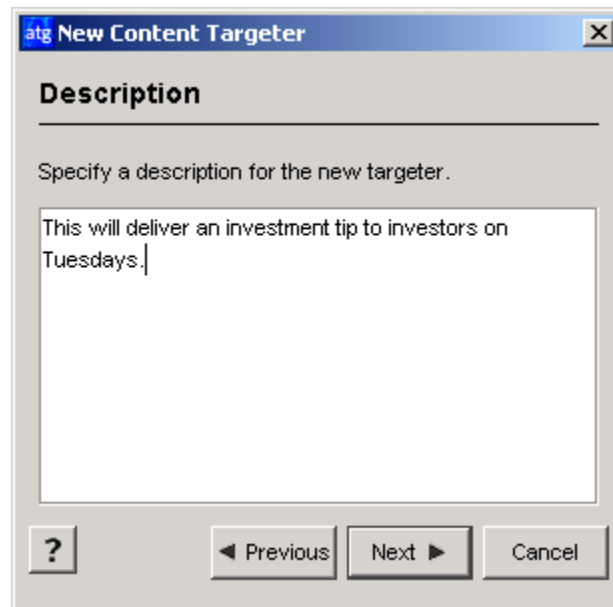
Adding New Content Targeters

To add a new content targeter to the Content Targeters panel:

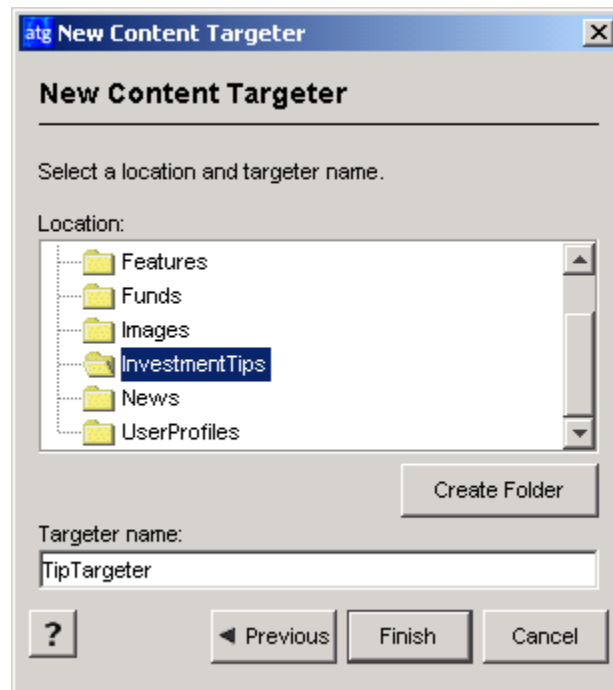
1. Click the New Content Targeter toolbar button in the top right corner of the Content Targeters window. The New Content Targeter dialog box appears.



2. 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.
3. From the Content Type list, select the type of content you want to target against. The type corresponds to the subset of items defined by 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](#).
4. Click Next. The following dialog box appears:



5. Type a brief description of this content targeter. (You can edit this description later if necessary.) When you have finished, click Next. The following dialog box appears:



6. Select the folder where you want to store this content targeter. Any folders already created to store targeters for your Web site appear in the list. Note that these folders are internal to the ATG Personalization module, which tracks them through an ATG-



specific path called a Nucleus address (for more information on Nucleus, refer to the [ATG Programming Guide](#).) The address for a targeter folder is `/atg/registry/RepositoryTargeters/<folder name>`. For example, the Investment Tips folder shown in the example is located at the Nucleus address `/atg/registry/RepositoryTargeters/InvestmentTips`. Any new folders you create will be located at a similar address.

In the example, the folder names correspond to the content repositories in the Quincy Funds demo, but it is not required that you use the same names as your content repositories.

7. Type the name of the new targeter. Do not include spaces in the name. Targeter names must be unique within a folder, but in addition it is suggested that you make all targeter names unique (regardless of their folder), so that page developers who insert targeters into site pages can distinguish them easily.
8. Click Finish. The new targeter appears in the Content Targeters window.

Next, you need to set up the business rules for this targeter. For more information, see [Setting Up Targeting Business Rules](#).

Setting Up Targeting Business 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 examples, see the [Business Rule Samples](#) section.

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 created a targeter that included 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: When creating or editing targeting rules, you can discard your changes and restore any previously saved settings by selecting File > Revert. This option is only available **before** you save your changes.

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

1. Select the targeter from the Content Targeters panel.
2. Click Show or Hide at the top of the Business Rules panel.
 - Show lets you specify the content you want visitors to see.
 - Hide lets you specify the content you don’t want visitors to see.

Note: Show rules are evaluated before hide rules.



The beginning of the new rule appears in the Business Rules panel. For example, if you click Show, you see the phrase “Show this content”. The following button bar appears immediately below the rule text, allowing you to set up the rest of your targeting rules.



3. Use the above button bar to set the rule’s content, people, time, and environment conditions. The following sections cover each of these steps in detail:
 - [Setting Content Conditions](#)
 - [Setting People Conditions](#)
 - [Setting Date and Time Conditions](#)
 - [Setting Environment Conditions](#)
4. If you want to add another rule set, select Add Another Rule Set from the Edit menu, and repeat steps 2-3. For more information on creating multiple rule sets, see the [Creating and Prioritizing Multiple Rule Sets](#) section.

You can also include any available rule macros (reusable business rules) by selecting Include Rule Macro from the Edit menu. For details, see the [Creating Reusable Business Rules \(Rule Macros\)](#) section.

5. When you have finished setting up your targeting rules, click the Save button.

After you save the targeter, a page developer can embed it into the appropriate site pages using the Pages and Components option.

Important: After you create or edit a content targeter, you must copy your changes from the staging server to your live site. See *Copying and Switching Databases* in the [ATG Installation and Configuration 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. For examples, see the [Business Rule Samples](#) section.

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.

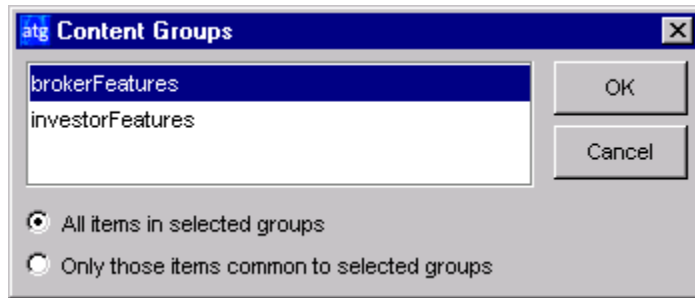
To set a rule’s content conditions:

1. Click the Show/Hide This Content button below the Business Rules panel. The content-related option buttons appear as shown below:



Note that you may have to resize the ATG Control Center window to see all the options.

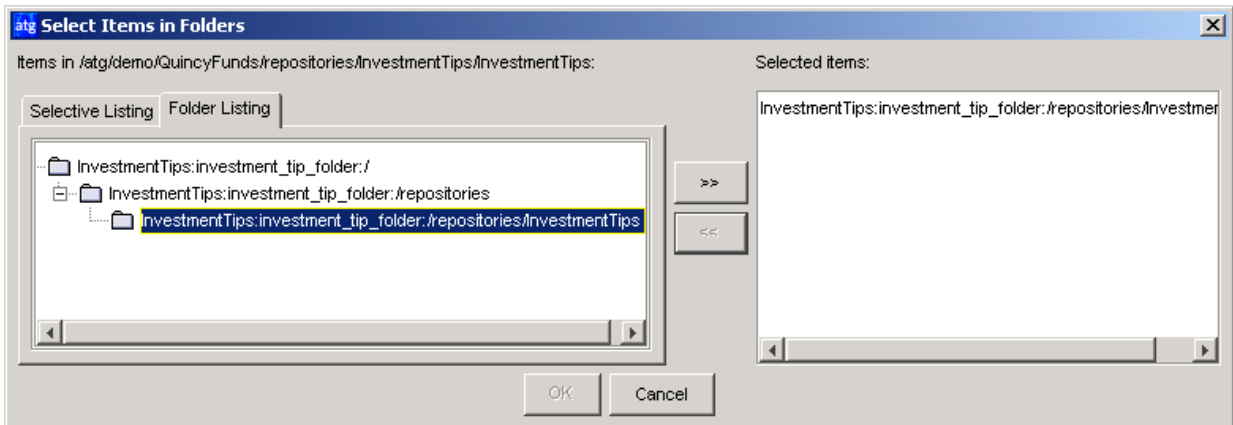
2. Specify the content you want to show or hide:
 - Click All Items if you want to show (or hide) all content items stored in the selected repository.
 - Click Items in Group(s) if you want to show or hide items from content groups created in the Profile and Content Groups window. The Content Groups dialog box appears as shown below.



If multiple groups exist and you want to select more than one, hold down the Control key while making your selections. You can choose All Items in Selected Groups or Only Those Items Common to Selected Groups. (A list of the groups you select appears at the bottom of the Business Rules panel along with an Edit Groups button. Click this button if you need to change your group selections.)

If you select the Items in Group(s) option you can define additional criteria by clicking the Whose button (described below).

- Click Items in Folder(s) if you want to show or hide all items from specific repository folders. The Select Items in Folders dialog box appears:



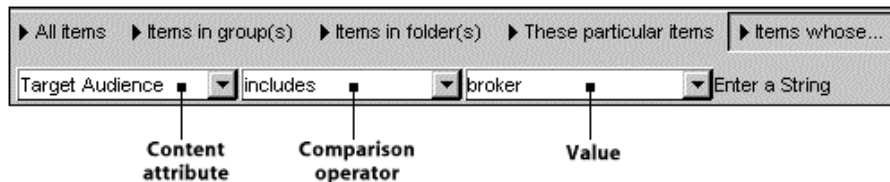
Select the folders containing the content you want to use, and then click the >> button to move them to the Selected Items list on the right. Click OK when you have completed your selections.

You can then define additional criteria by clicking the Whose button (described below).

- Click These Particular Items if you want to show or hide specific content items. When the Select Items dialog box opens, select the individual content items you want to include. Use the Selective Listing tab (similar to the dialog box shown above) to search for items of a specific repository type, or use the Folder Listing tab to display items according to the folder that contains them. In either tab, click the >> button to move the items to the Selected Items list on the right. Click OK when you complete your selections.

You can then define additional criteria by clicking the **Whose** button (described below).

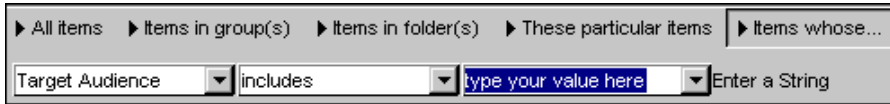
- Click Items Whose (or Whose if you clicked the Items in Groups(s), Items in Folder(s), or These Particular Items options) if you want to show or hide items based on specific content properties. When you select this option, several drop-down lists appear as shown below, allowing you to select the property, 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. The required value type (“string,” for example) appears next the text field.



In addition to any preset content properties values, or any values you might type yourself, the value list also contains the environment options described in the following table. You can use these options to set the value of your selected content property by testing it against a particular environment condition.

Browser’s	Select Browser’s to add a browser-related property to the definition. For example, <i>...items whose absolutePath is Browser’s request.remoteHost.</i>
Locale’s	Select Locale’s to add a locale-related property. For example, <i>...items whose language is Locale’s acceptLanguage.</i> Note: 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 ATG Programming Guide .
Person’s	Select Person’s to add another person-related property. For example, <i>...items whose keywords includes Person’s Actual Investment Goal.</i>
Request’s	Select Request’s to add a request-related property. For example, <i>...items whose relativePath is Request’s requestURI.</i>
Today’s	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 Control Center displays another drop-down list like the one pictured below, 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 And Whose and Or Whose buttons at the bottom of the Business Rules panel.



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

Setting People Conditions

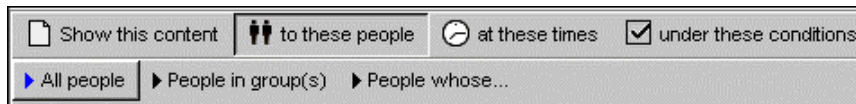
People conditions are tested against visitor profile properties to see if the rule set should be applied. For example:

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

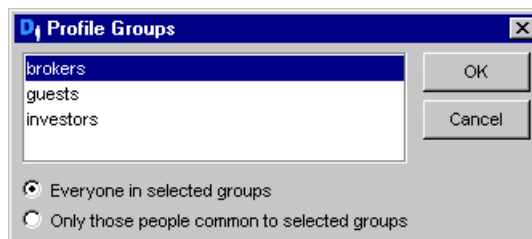
You can combine multiple people conditions using **AND** statements and **OR** statements. For examples, see the [Business Rule Samples](#) section.

To set a rule's people conditions:

1. Click the To These People button below the Business Rules panel. The people-related option buttons appear as shown below:



2. Specify the people you want to include in (or exclude from) your target audience:
 - Click All People if you want to include (or exclude) all visitors.
 - Click People in Group(s) if you want to include or exclude people from profile groups created in the Profile window. The Profile Groups dialog box appears as shown below.



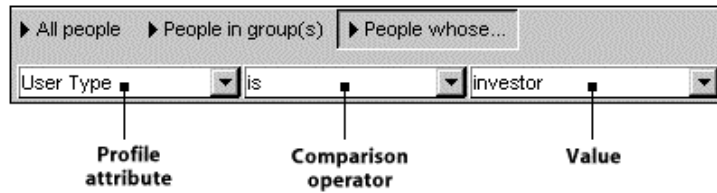
If multiple groups exist and you want to select more than one, hold down the Control key while making your selections. You can choose Everyone in Selected Groups or Only Those People Common to Selected Groups. (A list of the groups you select appears at the bottom of the Business Rules panel along with an Edit Groups button. Click this button if you need to change your group selections.)

If you select People in Group(s), you can define additional criteria by clicking the Whose button (described next).

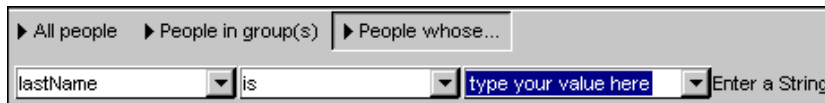


Note that you can use this option to target content according to the global or organizational role to which a person assigned. To do this, create a profile group that includes specific roles, and then include the profile group in the content targeter. For more information, see [Defining Profile Group Members](#).

- Click People Whose (or Whose if you selected the People in Group(s) option described above) if you want to include or exclude people based on specific profile properties. When you select this option, several drop-down lists appear as shown below, allowing you to select the 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 Personalization module. (For more information, refer to *Setting Up a Profile Repository* in the [ATG Personalization Programming Guide](#).) 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. The required value type (“string,” for example) appears next to the text field.



3. If you want to add other conditions to the rule, click the And Whose or the Or Whose buttons at the bottom of the Business Rules panel.

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 set should be applied. For example:

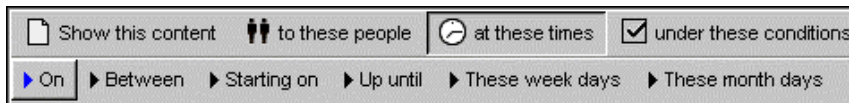
Show this content:
 items in group newMemberFeatures
 To these people:
 people in group NewMembers
 At these times:



every Mon, Wed, Fri between 9:00am and 9:00pm
 between 01-Jan-2000, 12:00am and 01-Jan-2001, 11:59pm

To set the rule's date and time conditions:

1. Click the At These Times button below the Business Rules panel. The time-related option buttons appear as shown below:

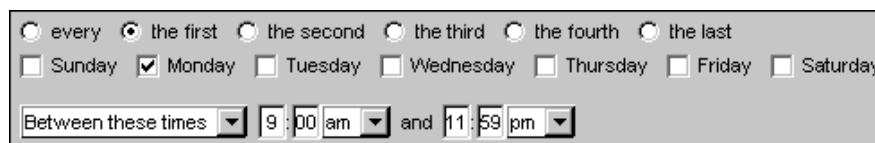


2. Set the time conditions you want to use.

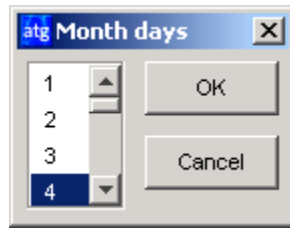
- Click On to show or hide content on a specific date. For example, *On Dec 19, 2003*.

Note: Click any "date" button such as one pictured above to select a new date from a pop-up calendar. Select All Day from the drop-down list to display the content all day. Select Between These Times from the drop-down list (illustrated in the next example) to set specific display times.

- Click Between to show or hide content between specific dates. For example, *between Dec 19, 2003, 12:00:00 AM and Dec 31, 2003, 11:59:00 PM, between 9:00am and 5:00pm.*
- Click Starting On to show or hide content starting on a specific date (without an end date). For example, *after Dec 19, 2003, 12:00:00 AM.*
- Click Up Until to show or hide content beginning immediately up until a specific date. For example, *before Dec 18, 2003, 11:59:00 PM.*
- Click These Week Days to show or hide content on certain days of the week. For example, *the first Monday of every month between 9:00am and 11:59pm.*



- Click These Month Days to show or hide content on certain days of each month. For example, *on these days of the month: 1, 5*. When you select this option, the Month Days dialog box appears.



If you want to select more than one day, hold down the Control key while making your selections. Click OK when you have finished.

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

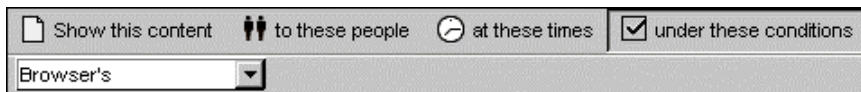
Setting Environment Conditions

Environment conditions cover properties that are not necessarily related to the visitor'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 visitor 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 environment conditions:

1. Click the Under These Conditions button below the Business Rules panel. A drop-down list appears as shown below:



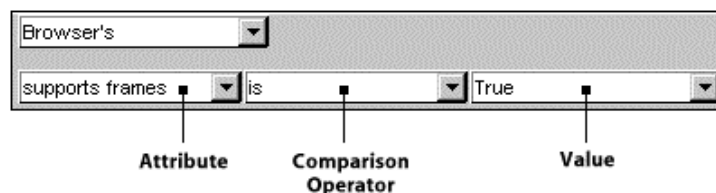
2. Select one of the following preset environment options from the drop-down list:



Browser's	Select Browser's to set a browser-related condition. For example: Browser' s remoteHost i s name. exampl e. com.
Locale's	Select Locale's to set a locale-related condition. For example, i f Local e' s defaultRequestLocal e i s en_ US. Note: 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 ATG Programming Guide .
Person's	Select Person's to set a person-related condition. For example, i f Person' s Home address. state i s NY.
Request's	Select Request's to set a request-related condition. For example, i f Request' s Loggi ngI nfo i s fal se. Developer's Note: The ATG 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 Targeti ngSourceMap service in the Personalization module. (For more information on setting up a Targeti ngSourceMap service, see Setting Up Targeting Services in the ATG Personalization Programming Guide .) Once your new Form Handler is in the Targeti ngSourceMap, all the object's properties should appear in a drop-down list of Form Handler properties in the ATG Control Center. You can then select them for your targeting business rules.
Today's	Select Today's to set a time-related condition. For example, i f Today' s date i s 10/20/2003.

The application developers working on your Web site can add other environment options to this list by setting up a Targeti ngSourceMap 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 Control Center displays additional drop-down lists (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 depend 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. The required value type ("string," for example) appears next to the text field.

The Value list also includes the same environment options as the drop-down list in the upper left corner. When you select one of these options from the Value list, another drop-down list appears as shown below, allowing you to select another property.

3. If you want to add another condition statement to the rule, click the **And** or the **Or** button at the bottom of the Business Rules panel.

Sorting Targeting Results

As an optional step when creating targeting rules, you can sort targeting results by specific content properties (*author name*, for example) in either ascending (A-Z, 1-9) or descending (Z-A, 9-1) order. This allows you to control the order in which the content items are retrieved and displayed from a content repository.

For example, if you sort targeted content items in ascending order by author, items are displayed from the content repository in alphabetical order by author name. The application developers can then, in turn, set up a targeting servlet bean that controls the order in which these retrieved items appear on a Web page. For example, the developers can set up a servlet bean that displays the first 10 items as they are retrieved from the content repository (in alphabetical order by author). They can also specify additional sorting criteria *within the servlet bean* that re-sorts and displays those 10 items (by title, for example).

Note: The sorting order specified by a developer in a targeting servlet bean overrides the sorting order specified in the content targeter. If no sorting order is specified in the servlet bean, items are displayed in the order in which they are retrieved from a content repository.

To sort targeted content items:

1. Click **Step 2 Specify options for displaying this content** at the top of the Content Targeters window.
2. In the Sort Items By list, select the properties you want to sort by.
3. Click the Add button to move your selected properties to the Selected Properties list on the right side of the window. If you want to select multiple properties, hold down the Control key while making your selections.

An arrow appears to the right of each property, indicating its current sorting order. (By default, properties are sorted in ascending order.) If you want to change a property's



sorting order, select it and click one of the Order buttons in the lower right corner of the window.

Note: Properties are used in the order in which they appear in the Selected Properties list. If you want to change the order, select a property, remove it (by clicking the Remove button), and re-add it to the list (by clicking the Add button).

Creating and Prioritizing Multiple Rule Sets

Business rules are evaluated sequentially as they appear in the Business Rules panel 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 *Features* targeter in the Quincy Funds demo 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 Local e's Local eString
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 Local e's Local eString
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. Select Add Another Rule Set from the Edit menu. The following rule break appears at the bottom of the rule list:

-----If no items were selected, try the following rules-----

2. Set up the rules for the new rule set. (See the [Setting Up Targeting Business Rules](#) section for details.) You can move the rule set by choosing Select Entire Rule Set from the Edit menu and clicking the Move Up or Move Down buttons in the Business Rules panel.
3. Click Save.



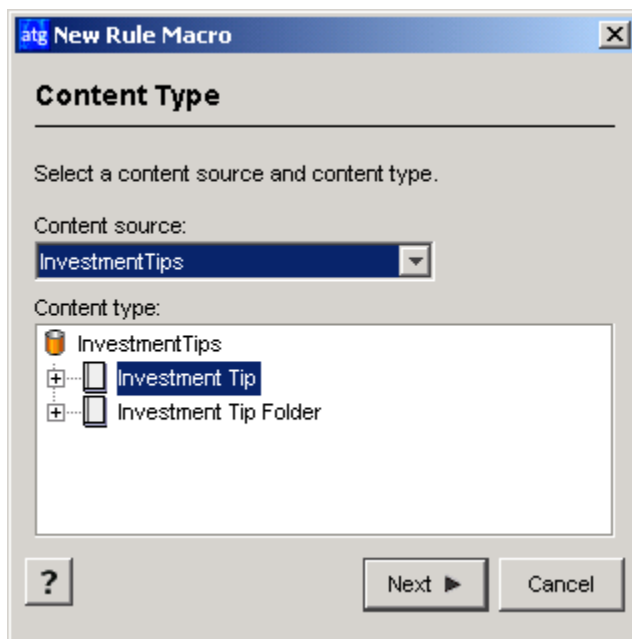
Creating Reusable Business Rules (Rule Macros)

If there are certain business rules that you apply on a routine basis, you can create a set of reusable rules called a **rule macro** that you can insert into any content targeter.

You create rule macros in the same way you set up content targeters. The only difference is that macros are standalone rule sets, meaning that they aren't associated with a particular content targeter. Also, rule macros cannot include rule breaks as described in the previous section.

To create a rule macro:

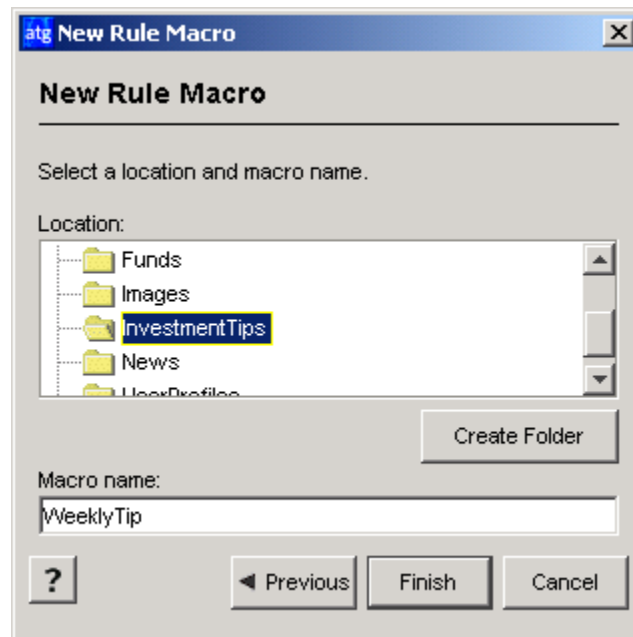
1. Display the Content Targeters window, and then select File > New Rule Macro. The New Rule Macro dialog box appears:



2. Select a content 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 targeting rules in this macro will apply only to items in this repository.
3. From the Content Type list, select the type of content you want to target against.
4. Click Next. The following dialog box appears:




5. Type a brief description of this macro, and then click Next. The following dialog box appears:



6. Specify the folder where you want to store this macro. Note that these folders are internal to the ATG Personalization module. For a more detailed explanation, refer to [Adding New Content Targeters](#).



7. Type the name of the new macro. Do not include spaces in the name.
 8. Click Finish.
 9. Set up the targeting business rules for the macro. For details, see the [Setting Up Targeting Business Rules](#) section.
 10. Save the business rules for this macro and close the business rules window. The new macro (identified by the  icon) appears in the list of targeters in the Content Targeters window. (The macro is located in the folder you specified in step 6.)
- You can insert this macro into any content targeter by selecting Include Rule Macro from the Edit menu.

Deleting Business Rules

To delete all or part of a targeting business rule:

1. In the Business Rules panel, select the part of the business rule you want to delete:
 - If you want to delete a specific line within rule set, click on just that line.
 - If you want to delete a single rule (a Show or Hide rule with its associated phrases), click on a line within that rule and then choose Edit > Select Entire Rule.
 - If you want to delete an entire rule set (one or more Show or Hide rules with no breaks between them) choose Edit > Select Entire Rule Set.
2. Select Edit > Delete.
3. Select File > Save.

See [Deleting Content Targeters](#) for information on deleting entire content targeters from the ATG Control Center.

Business Rule Samples

The following examples show some of the many ways you can combine the choices in the business rules section to create targeting rules.

Sample 1: Show the content item car.j sp to all people who belong to the profile group CarLovers and live in Boston from December 2, 2003 to December 6, 2003. If the user does not fit this description, show him or her the content item generi c. j sp.

```
Show this content:
  car.j sp
to these people:
  people i n the group CarLovers
  whose Home address. ci ty i s Boston
at these times:
  between Dec 2, 2003, 12:00:00 AM and Dec 6, 2003, 11:58:00 PM
-----If no i tems were selected, try the following rules-----
Show this content:
```

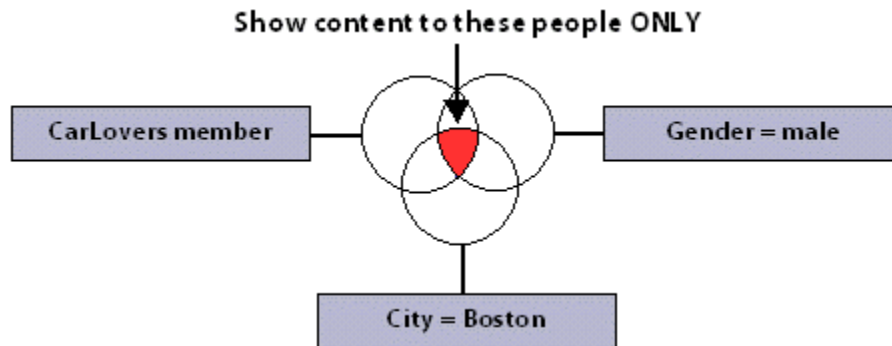


generi c. j sp
 to everyone
 at these times:
 between Dec 2, 2003, 12:00:00 AM and Dec 6, 2003, 11:58:00 PM

Like profile group and content group definitions, targeting business rules are based on Boolean (“and/or”) logic. This means that you can use **AND** statements and **OR** statements to create more sophisticated targeting rules. AND statements let you show (or hide) content if *all conditions* in the rule are met. OR statements let you show (or hide) content if *any of the conditions* in the rule are met. The following samples show how these subtle wording changes can change the meaning of a rule completely.

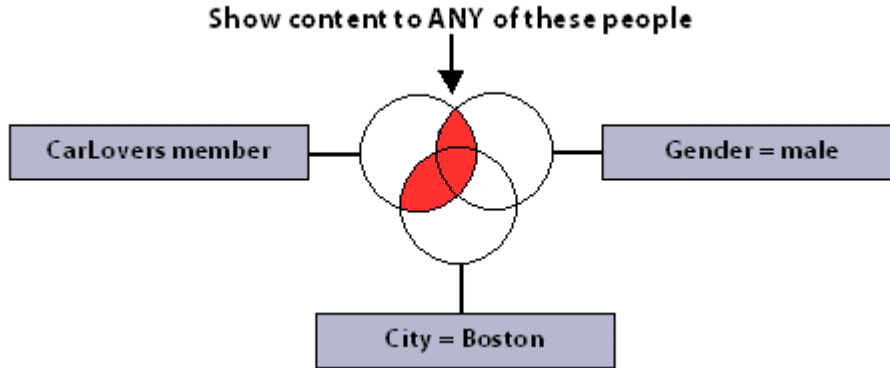
Sample 2: Show the content item car. j sp to all people in the profile group called CarLovers who are (a) from Boston **AND** (b) male:

Show this content:
 car. j sp
 to these people:
 people i n group CarLovers
 whose homeAddress. ci ty i s Boston
 and whose Gender i s male



Sample 3: Show the content item car. j sp to all people in the profile group called CarLovers who are (a) from Boston **OR** (b) male:

Show this content:
 car. j sp
 to these people:
 people i n group CarLovers
 whose Home address. ci ty i s Boston
 or whose Gender i s male



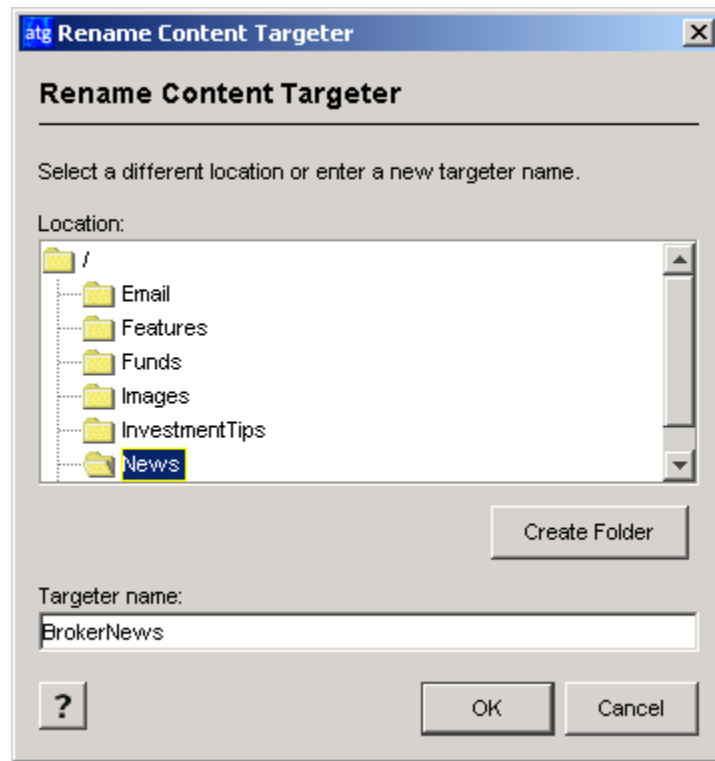
Moving or Renaming Content Targeters

Important: Renaming a content targeter that is currently in use by a Web page may result in errors when users visit that page. Before renaming any targeter, be sure all references to it are updated accordingly.

To rename an existing content targeter or move it to another folder:

1. Select the content targeter from the Content Targeters panel.
2. Select Move/Rename Content Targeter from the File menu. (**Note:** You cannot move or rename a targeter that is currently open in the ATG Control Center. To close the targeter, navigate to it by using the arrow buttons in the toolbar, and then select File > Close.)

The Rename Content Targeter dialog box appears.



3. To move the targeter to a different folder, select the destination folder from the list at the top. To rename the targeter, type the new targeter name (do not include spaces). Note that these folders are internal to the ATG Personalization module; for more information, see [Adding New Content Targeters](#).
4. Click OK.

Editing Content Targeter Descriptions

The Description column in the Content Targeters window displays a description of each targeter. To edit the description:

1. Select the targeter from the Content Targeters window. (To select a targeter without opening it, click any column other than the Name column.)
2. Select File > Edit Description. The Edit Description dialog box opens.
3. Type the new description for the targeter and click OK.



Deleting Content Targeters

You can delete targeters that you no longer need. Doing so removes only the targeter's name, description, and targeting rules from the ATG Control Center; it does not affect any content or profile information referenced within the targeting rules.

Important: Deleting a content targeter that is currently being used by a Web page will result in errors when users visit that page. Before deleting any targeter, make sure that it is no longer in use on your Web site.

To delete a content targeter:

1. If the targeter you want to delete is open, navigate to the targeter's window by using the arrow button on the toolbar, and then close it by selecting File > Close.
2. Select the content targeter from the Content Targeters window. (To select a targeter without opening it, click any column other than the Name column.)
3. Select File > Delete Content Targeter.
4. When the confirmation dialog box appears, click Yes to confirm the deletion.

Copying Targeters to the Live Site

After you create or edit content targeters in the ATG Control Center, you must copy your changes from the staging server to the live site. For more information, see *Copying and Switching Databases* in the [ATG Installation and Configuration Guide](#).



8 Tracking Visitor Behavior

An important part of the process of personalizing a Web site is gathering information about each visitor and then tailoring the content of the site to meet that visitor's preferences and probable requirements. As explained earlier in [Setting Up Visitor Profiles](#), you can gather information by asking visitors to supply information about themselves directly. For example, you can have them fill in a registration form in which you ask them to supply their age group or income range. You can also gather information implicitly by monitoring what visitors do on your site. For example, which pages do they visit? Which images do they display? What products have they bought? You then use this information to tailor the content of your Web site for each person. The next time a visitor comes to your site, he or she sees content that better meets his or her needs. Over time, you can develop detailed profiles of your site visitors, allowing you to provide better service for your customers and build more reliable relationships with them.

If your Web site does not use scenarios, you can use the Targeting > Tracking Sensors window in the ATG Control Center to gather implicit information about your site visitors and change content accordingly. You set up **tracking sensors** to monitor visitor behavior on your Web site, including their session activity and the specific content they view. You then create **action statements** for these sensors that tell the system how to change a visitor's profile in response to each event. These statements take the following form: *When a visitor <does this>, perform these actions*. For example:

```
When a visitor:  
  views this type of content  
    Add the value of Aggressive Index to the person's Aggressive  
    Index attribute
```

You then set up targeting rules that display different content according to the properties in each user's profile. For more information on targeting rules, see [Matching Content with Your Target Audiences](#).

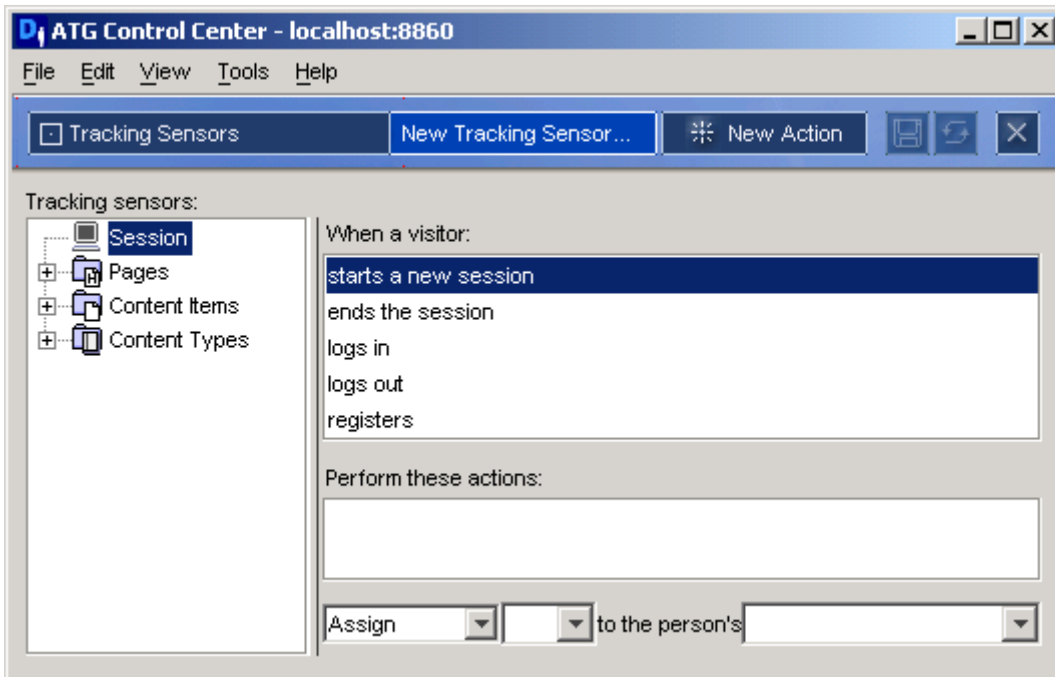
Using Scenarios to Track Visitor Behavior

If you use the Scenarios module as part of your ATG product suite, you must use scenarios instead of sensors to track visitor behavior and change their profiles.

The rest of this chapter describes using tracking sensors. For information on using scenarios instead, see [Creating Scenarios](#).

Using the Tracking Sensors Window

To open the Tracking Sensors window, select Targeting from the main ATG Control Center menu and then select Tracking Sensors. The following window appears:



Targeting > Tracking Sensors

Note: If the Tracking Sensors option does not appear, use scenarios instead of tracking sensors to track visitor behavior. Please refer to [Creating Scenarios](#) for more information.

The Tracking Sensors window is divided into three panels:

- The Tracking Sensors panel on the left lists the tracking sensors available for your Web site. These sensors are divided into the following categories: Session, Pages, Content Items, and Content Types.

Note: You add individual tracking sensors to the Page, Content Item, and Content Type categories by clicking the New Tracking Sensor toolbar button in the top right corner of the window. (For details, see the [Adding New Tracking Sensors](#) section.) However, as described below, the Session tracking sensors are pre-defined. You cannot add new Session sensors; you need only to create action statements in order to use them.

- The When a Visitor panel shows the events you can track within each category. These events are preset; you cannot change them or add new ones.
 - **Session.** Track when a visitor:
 - starts a new session
 - ends the session
 - logs in
 - logs out
 - registers



- **Pages.** Track when a visitor views a particular page.
 - **Content Items.** Track when a visitor views a particular content item, such as an HTML or GIF file.
 - **Content Types.** Track when a visitor views content of a particular type, such as HTML or XML.
- The Performs These Actions panel lets you create action statements that control how visitor profiles are updated in response to selected tracking events. For more information, see the [Creating Action Statements for Tracking Sensors](#) section.

Adding New Tracking Sensors

In order to track the pages, content items, and content types that your Web site visitors are viewing, you must add individual tracking sensors to those categories in the Tracking Sensors panel. (**Note:** Session tracking sensors are preset. You cannot add new Session sensors; you only need to create action statements in order to use them. For more information, see the [Creating Action Statements for Tracking Sensors](#) section.)

To add a new Page, Content Item, or Content Type tracking sensor:

1. Click the New Tracking Sensor button in the toolbar at the top of the Tracking Sensors window. The New Tracking Sensor dialog box appears.
2. Select a tracking category (Content Item, Content Type, or Page) from the Monitor drop-down list.
 - If you select Content Item (as shown above), choose a repository from the Content Source list, and then select the item you want to track.
 - If you select Content Type, choose a repository from the Content Source list. The dialog box shows you the types of content stored in that repository (HTML, for example), allowing you to select the type you want to track.
 - If you select Page, select the page you want to track from the document directory.
3. Click OK.

The new sensor appears under the appropriate category in the Tracking Sensors panel. Content Item and Content Type sensors are listed under the content repository you selected.

Next you create an action statement that controls how this tracking event affects visitor profile information. See the following section, [Creating Action Statements for Tracking Sensors](#).

Creating Action Statements for Tracking Sensors

Each time you add a new tracking sensor (or use one of the pre-defined Session sensors), you need to specify how you want the tracking results to modify visitor profile information. The ATG Control Center guides you through this process by helping you create simple action statements that update specific visitor properties.

To create an action statement:

1. Click on the tracking sensor in the Tracking Sensors panel.
2. Select a tracking event in the When a Visitor panel. The event you choose represents the first part of your action statement. For example,

When a visitor:
views this type of content

As shown below, several drop-down lists appear below the Perform These Actions panel, allowing you to construct the rest of your action statement.



3. Select one of the following actions from the drop-down list:
 - **Assign** assigns the value of the selected tracking property to the selected profile property.
 - **Append** appends the value of the selected tracking property to the selected profile property.
 - **Append Once** appends the value of the selected tracking property to the selected profile property unless the property has already been appended. (After the property has been appended once, you can't append it again.)
 - **Add** adds the value of the selected tracking property to the selected profile property.
 - **Subtract** subtracts the value of the selected tracking property from the selected profile property.

The next part of your action statement appears in the Perform These Actions panel. For example:

When a visitor:
views this type of content
Perform these actions:
Add. . .

4. Select a tracking property from the drop-down list (or select Enter a Value to type your own value). For example, if you were to select a property called Aggressive Index, the following text would appear in the Perform These Actions panel:



When a visitor:
 views this type of content
 Perform these actions:
 Add the value of Aggressive Index. . .

Note: The properties that appear in this list vary depending on the kind of tracking sensor you are working with. Content Item sensors use properties that are specific to all items within a particular content repository. Similarly, Content Type sensors use properties that are shared by all repository items of a particular type. Session and Page tracking sensors have pre-defined properties for you to choose from when you are creating action statements. For more information, see the [Tracking Sensor Properties](#) section.

5. Select a profile property from the drop-down list. **Note:** The properties that appear in this list vary depending on the tracking sensor property you selected in the previous step. Only those properties of matching type are displayed.

For example, if you were to select a profile property called Aggressive Index, the following text would appear in the Perform These Actions panel:

When a visitor:
 views this type of content
 Perform these actions:
 Add the value of Aggressive Index to the person's Aggressive Index attribute

6. If you want to add other lines to the action statement, click the New Action button and repeat steps 3-5.
7. Click Save. (If you select another sensor from the Tracking Sensors panel or switch to another task window before saving your changes, the ATG Control Center saves them automatically.)

Important: After you add new tracking sensors, you must copy your changes from the staging server to your live site. For more information, see *Copying and Switching Databases* in the [ATG Installation and Configuration Guide](#).

Tracking Sensor Properties

The following table lists the common properties you can apply to any tracking sensor and the pre-defined properties you can use for Session and Page sensors.

Note: Content Item and Content Type sensors can use the common properties listed below along with the properties specific to their particular content repository and content type.

Common Tracking Properties	Description
time	The time (in milliseconds) at which the tracking event occurred.
timeAsDate	The time at which the tracking event occurred (as a Date object).



event type	An integer index that represents the event in the When a Visitor panel (e.g., <i>When a visitor logs in</i>).
Session Tracking Properties	
creationTime	The time at which the session object was created.
sessionId	The ID for this session.
lastAccessedTime	The time at which this session object was last accessed.
mimeType	The MIME type of the request.
usingCookies	True if the client driving this session is using cookies to maintain the session.
usingUrlRewriting	True if the client driving this session is using URL rewriting to maintain the session.
Page Tracking Properties	
path	The path of the page relative to the document root.

Removing Tracking Sensors

You can remove Page, Content Item, or Content Type tracking sensors when you no longer need them. You cannot remove Session tracking sensors, but you can disable them by deleting their action statements. For more information, see [Deleting Action Statements](#).

To remove a tracking sensor:

1. In the Tracking Sensors panel, select the tracking sensor you want to delete.
2. Select File > Delete Tracking Sensor. The ATG Control Center removes the tracking sensor and action statement.

Deleting Action Statements

To delete all or part of an action statement:

1. In the Perform These Actions panel, select the part of the statement you want to delete.
2. Select Edit > Delete.
3. Click Save.



Copying Tracking Sensors to the Live Site

After you create or edit tracking sensors in the ATG Control Center, you must copy your changes from the staging server to the live site. For more information, see *Copying and Switching Databases* in the [ATG Installation and Configuration Guide](#).





9 Creating Scenarios

The Scenarios module is a component of the ATG platform that you can use to set up and manage customer **scenarios**, which are a choreographed series of interactions with your Web site visitors. In a scenario, you anticipate and track the actions of the people who visit your Web site, and you respond appropriately by, for example, tailoring the content of the Web site, offering price promotions, or sending targeted e-mail messages.

The following is an example of a scenario: Your statistics show you that 30 percent of people who register for membership at your Web site never return for a second visit. You decide that you need to improve your record of retaining new members, and you come up with the following plan:

- You will send a “Welcome!” e-mail to all new members as soon as they register, thanking them for joining your site and highlighting the services you can provide.
- To members who do not return to the site within the next month, you will send an e-mail offering an incentive to return.

You use the Scenarios module to set up a scenario that implements the plan as a series of triggers and responses. You create the scenario by selecting building blocks from lists in the Scenarios area of the ATG Control Center and arranging them like a flow diagram. When it is finished, you have a graphical representation of the entire scenario, which makes it easy to visualize and change as necessary. The following shows a completed scenario:



At the start of a scenario, the system considers all possible subjects (the set of all site visitors, whether currently active or not) for inclusion. As subjects move through the scenario, they encounter building blocks (called **elements**) that affect their progress in various ways. Some elements prevent the subject from proceeding further until a particular event occurs. Some carry out an action of some kind. Others narrow the set of subjects passing through the scenario by specifying criteria that subjects must meet to proceed.

The elements in a scenario tell the Scenarios module the following:

- The group of people to whom you want the scenario to apply;
- The events that you want the system to watch for;



- The actions you want the system to perform in response;
- The data you want the system to collect;
- The timing of the scenario. You can use timing elements to define a qualifying window for actions, an amount of time that you want the system to wait at any stage, and the time and date that you want the system to perform a specific action.

If you use ATG products in a multisite environment, meaning your installation supports two or more customer-facing Web sites that share data such as user profiles or a shopping cart, you can also specify the site or sites to which elements in the scenario apply. For information on setting up a multisite environment, refer to the [ATG Multisite Administration Guide](#).

Scenario Templates

For scenarios that you will use frequently, you can set up templates. With a template, you can save a scenario and then use it as a pattern to create others. For more information, see [Creating Templates for Scenarios](#).

User Sampling

You can also use scenarios to perform **user sampling**, in which you test scenarios and other Web site content on different groups of site visitors and then use the results of the test to fine-tune your Web site. For more information, see [Performing User Sampling](#).

How Are Scenarios Different from Targeters?

Several features in the Scenarios module are also available in a different form in the Personalization module. For example, you can set up targeters in the Personalization module that respond to user actions by displaying personalized content on a page or by sending e-mail.

The Scenarios module, however, introduces an **element of time** to the way you interact with visitors and personalize your site content. Scenarios can contain elements that tell the system to wait for a specified period before continuing with the next step; for example, you can have the system identify new members, and then wait three months before sending out a follow-up message. It is primarily this feature that turns a collection of unconnected personalization and targeting activities into a campaign and allows you to choreograph (and therefore better control) the relationship between your visitors and your Web site.

The following guidelines below suggest when to use scenarios and when to use targeters.

- Scenarios are triggered by events. If you want to personalize content as a result of a site visitor's doing something specific (for example, logging in), use a scenario. Targeters are not event based.
- The business rules you can set up through targeters are more flexible in some cases than scenarios. For this reason, if you need to set up highly complex rules to match content to visitors, use targeters.



- Scenarios use a feature called slots to display dynamic content. Slots provide some powerful advantages over targeters (for example, you can set up empty slots that generate their own requests for content).
- The reporting features of the Scenarios module rely on scenarios to supply data. If you want to use reports to track and analyze business information, you must set up appropriate scenarios.
- As described above, scenarios are time aware. If you want to set up a long-term approach to content and visitor management, use scenarios.

Scenarios and targeters are, however, complementary features. You can use a combination of targeters and scenarios to achieve the results you want.

Security Access in Scenarios

The Scenarios option in the main ATG Control Center navigation menu contains two items: Scenarios and Scenario Templates. Your ability to access these items is determined by the security rights that the ATG system administrator assigns to your group in the People and Organizations > Control Center Groups window. For example, he or she may give access to scenario templates to some users but not others. For more information, refer to [Security Access in the ATG Control Center](#).

In addition, the administrator can define an additional layer of security that controls access to specific scenario folders and individual scenarios.

Note also that your access rights to content repositories may also affect the items that you can include when you create scenarios. If, for example, you are trying to include a specific file in a slot element, and that file does not appear as an option in the list, you may want to check that your Control Center group has the appropriate access rights to the content repository in which the file is stored.

For more information, refer to *Setting Up Scenario Security Access* in the [ATG Personalization Programming Guide](#).

Creating a Scenario: Basic Steps

This section describes the basic steps you perform to create scenarios. **Important:** If you want to create or edit scenarios through the ACC on the management server (the server where ATG Content Administration and the ATG Business Control Center are installed), you must run the ATG platform with the Preview layer. For more information, see the [ATG Business Control Center Administration and Development Guide](#).

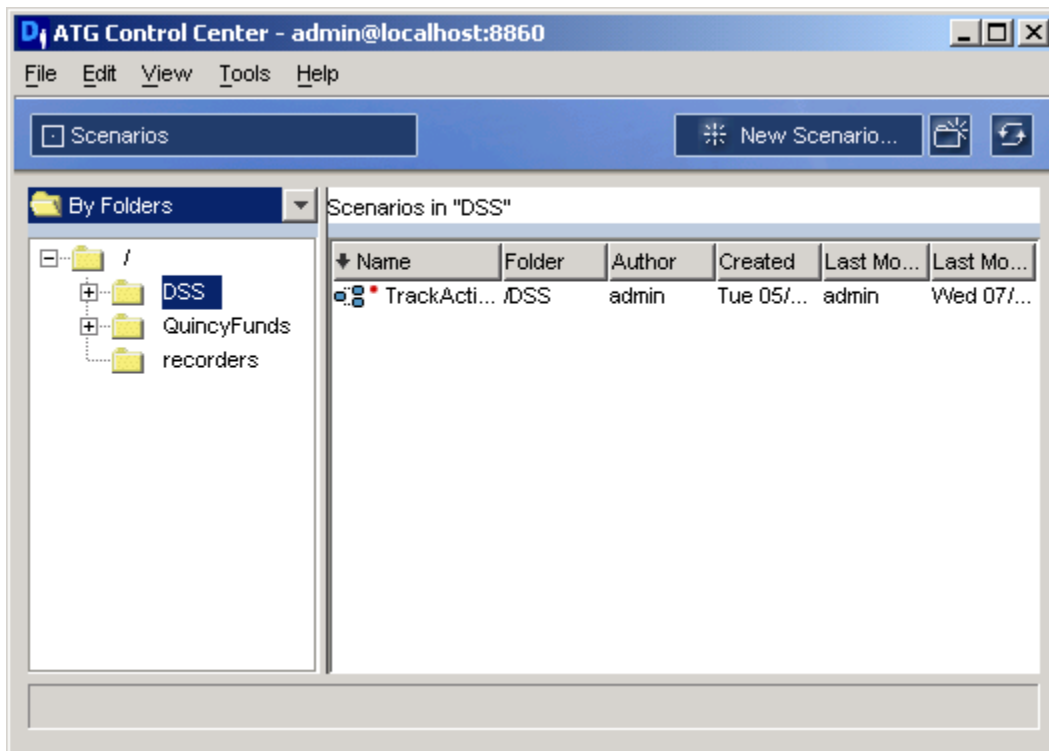
The following example shows how you would create a scenario to implement the plan outlined at the beginning of this chapter for retaining more new members at your Web site. The plan can be summarized as follows:

- Send a "Welcome!" e-mail to all new members as soon as they register.

- For members who do not return to the site within the next month, send an e-mail including a special offer.

Complete the following steps to create this scenario:

1. Start the ATG Control Center. (For more information, see [Starting the ATG Control Center](#).) Note that you must use the ATG Control Center that is connected to the scenario editor server; otherwise, the menu options that allow you to create and edit scenarios will not be available. For more information on the differences between global, individual, and scenario editor servers, refer to the [ATG Personalization Programming Guide](#).
2. Select Scenarios from the main ATG Control Center window, and then select Scenarios. The following window appears:



Scenarios > Scenarios window

3. Select By Folders from the dropdown list in the top left corner of the window.
4. Select File > New Scenario. The Create New Scenario wizard appears.
5. In the first screen, Use Scenario Template?, click No.

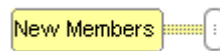
Templates are pre-defined scenarios that contain a variety of standard elements. You can customize templates by adding your own elements, and you can create your own new templates for scenarios you expect to use frequently. For more information, see [Creating Templates for Scenarios](#) or [Creating a Scenario from a Template](#).



6. Click Next, and use the window that appears to name the new scenario and to specify the folder where you want to save it. Note that these folders are internal to the ATG Scenarios module.
7. Click Finish. The scenario editor window appears, and it displays the first element of a new **segment**. Segments are the individual phases of a scenario.

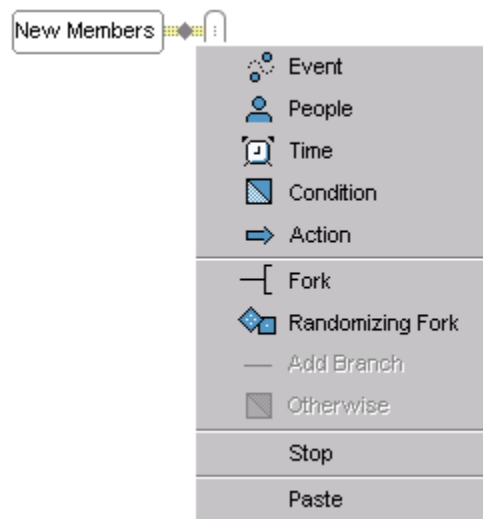


8. Double-click the word "Segment" to make the text editable, and type a descriptive name. Then press Enter. The new name appears.



The following section shows how to add elements to the new scenario segment:

To add the next element, move the mouse over the line between the two rectangles and click the small diamond that appears on the line. (The line is called a **connector**.) A drop-down list appears showing the types of elements you can select.



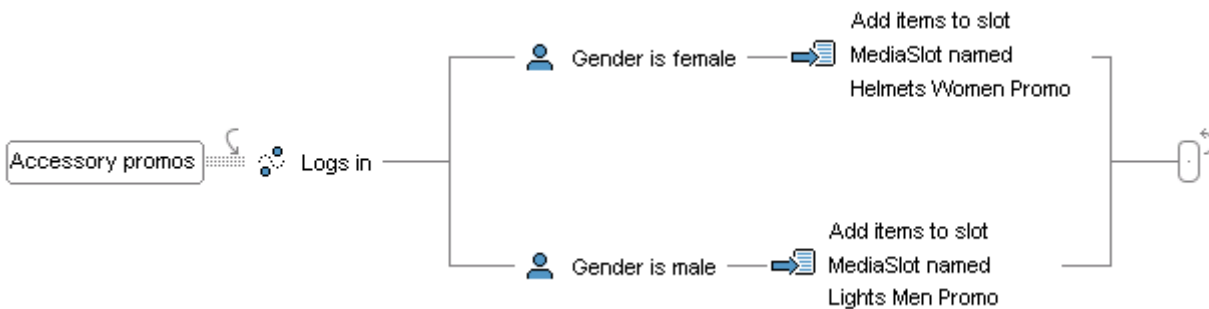
A set of standard elements is provided with the Scenarios module, but you can also add your own if necessary. For more information, see [Adding Custom Elements to Scenarios](#).

- **Event** elements are the "what" part of the scenario. They define the visitor behavior that you want to use as a trigger for the next element in the scenario. Examples: "visits page in folder /shoes" or "views an item from Products in the category 'shoes.'" For more information, see [Using Event Elements in Scenarios](#).



- **People** elements are the “who” part of the scenario. They act as filters that define the group of site visitors to include. Example: “People whose gender is female.” The system compares the criterion in the People element to the visitor profiles in your profile repository and includes in the scenario those people whose profiles match the criterion. For more information, see [Using People Elements in Scenarios](#).
- **Time** elements are the “when” part of the scenario. They can define either a specific moment in time (for example, “on March 13th at 12:00 PM”) or a period of time that you want the system to wait between elements (for example, “wait three months”). For more information, see [Using Time Elements in Scenarios](#).
- **Condition** elements add an “if” condition to the scenario, qualifying the preceding element. For example, after a `visits page in folder /shoes` element, you could have a Condition element that specifies the exact page: “if page is `/shoes/hikingboots.jsp`.” If the site visitor meets the criterion, the system applies the next scenario element. For more information, see [Using Condition Elements in Scenarios](#).
- **Action** elements extend the “what” part of the scenario. While Event elements define what the site visitor does, Action elements define what the system does in response. For example, you can have the system send an e-mail, modify a specific property in a user’s profile, or display a specific piece of content in a slot. (For more information on slots, see [Using Slots](#).) For more information, see [Using Action Elements in Scenarios](#).
- **Fork** elements add parallel “if” conditions, allowing you to divide a scenario into separate **branches** and treat each branch differently. For example, you can have the system split the group of visitors according to gender, with one branch for female visitors and another for male visitors. You could then add different Action elements to each branch, displaying appropriate promotional items to each group. For more information, see [Using Fork Elements in Scenarios](#).

The following image shows a scenario that includes a fork:



You can also use forks to watch for and handle multiple events within the same scenario. For example, you can create a scenario that watches for any visitor to log into a Web site and then watches for them to visit any one of a number of pages. You would add a Fork element and then add a “Visits” Event element to each branch, with each branch handling a different page.

You can create nested forks (forks within a fork), which allow you to handle complex “if” criteria within a single scenario.

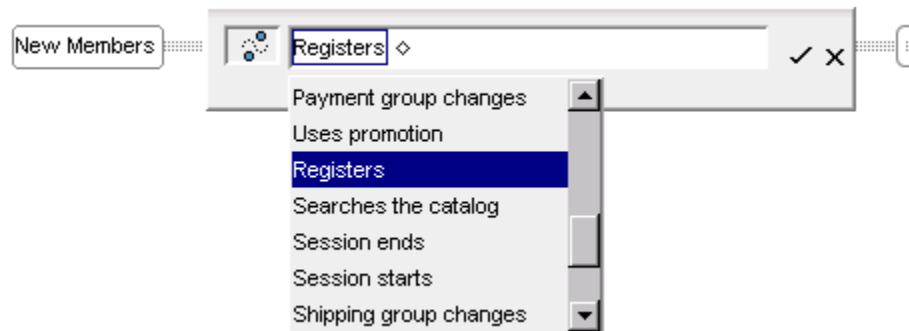


- **Randomizing Fork** elements are the foundation for the powerful user sampling functionality of the Scenarios module. They are essentially the same as forks, except they allow you to divide the group of site visitors by percentage. So, for example, you could divide a scenario into two branches, displaying Product A to 50 percent of the group and Product B to the other 50 percent. You use this element type in combination with the Scenario module’s data tracking features to measure the success of scenarios and Web content; in this case, you could measure the popularity of Product A over Product B in terms of quantity sold.

For more information, see [Performing User Sampling](#).

- **Add Branch** elements allow you to add new empty branches to a fork.
- **Otherwise** elements allow you to add an “else” statement to a fork. For more information, see [Using Otherwise Elements in Scenarios](#).
- **Stop** elements prevent a visitor from progressing through a scenario in a given situation. When a visitor triggers a stop element, he or she is removed from the scenario and does not proceed to any subsequent elements. A Stop element is also added automatically to the end of each scenario. For more information, see [Specifying the End of a Scenario](#).

In this example, the first step in the scenario is to identify people who have just registered at your site. You select Event and then you select Registers from the list of available event types.



Click the check mark at the end of the edit box to accept this element as part of the scenario. (Clicking the x removes this element.)

The ATG Control Center displays the new element in the scenario:



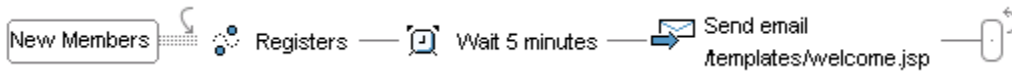
The Registers element tells the system to wait for a visitor to register at your site and then allow him or her to continue to the next element of the scenario. You can also include various qualifiers that further define the registration event – for example, you can include a qualifier that tells the system to watch only



for those registrations that occur during a specific type of visitor session. For this example, however, you want to apply the scenario to all registrations, so you do not add any qualifications to the element.

Note that the connector (the line between elements) has changed from a triple line to a single one. The difference in line width shows that any remaining elements in the scenario apply only to individual site visitors rather than to all visitors.

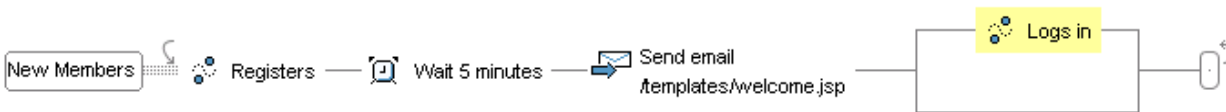
Next, you want the scenario to send a “Welcome!” e-mail to the people who just registered. First you add a Time element, Wait 5 Minutes, to allow the system to process the registration before sending the message. You click the connector and add the Time element. Then you add an Action element, selecting Send Email from the menu. In the Send Email element, you specify welcome.jsp from the list of available targeted e-mail templates. (Your page developer sets these up in the Pages and Components > Pages area of the ATG Control Center. For more information, see [Working with Targeted E-Mail.](#))



Note: In most cases, it is not necessary to add a Wait element between an Event element and a Send Email element. The exception is the Registers event.

At this point you want the system to respond differently to new members depending on their behavior.

You add a Fork element to the scenario. You use one branch to handle members who do return to the site. To this branch you add an Event element, selecting “Logs in” from the list of available events.



You use the other branch for people who do not satisfy the “Logs in” condition in the first branch. You add a Time element, selecting “Wait thirty days” from the list. To that same branch, you then add a Send Email Action element, selecting newmemberoffer.jsp from the list of targeted e-mail templates. Again, a page developer sets these up in the Pages and Components > Pages area of the ATG Control Center.



Note that the vertical order of the branches is not important.

Select File > Save. The scenario is complete. It is not active, however, until you enable it and then copy it to your live site (see [Enabling and Disabling Scenarios.](#))



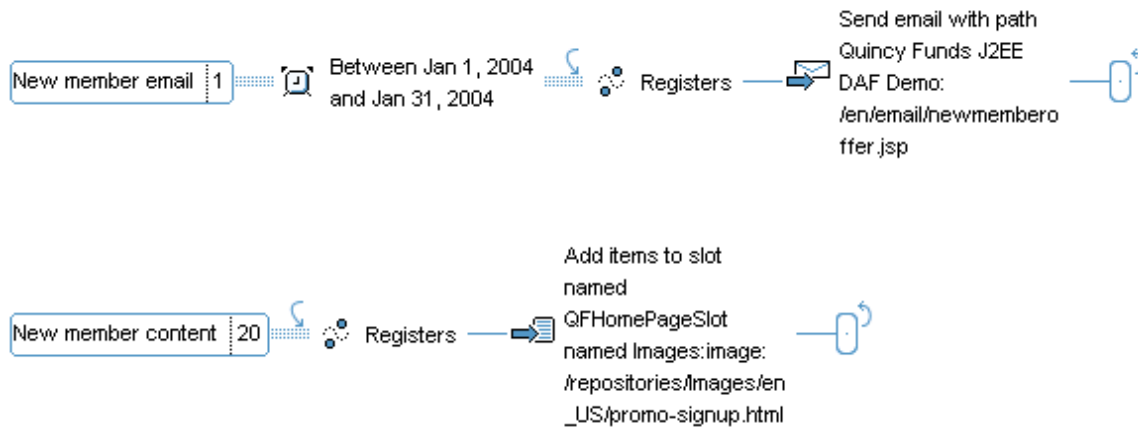
A Note About Scenarios with More than One Segment

Scenarios can contain as many segments as you require. However, it is important to note that there is no physical connection between separate segments in the same scenario; visitors do not pass from the end of one segment to the beginning of the next. The advantage of including more than one segment in a scenario is organizational: you can give the scenario a meaningful name (for example, “promotions”) and then keep all segments related to that subject in the same scenario.

To add a new segment to a scenario, select Edit > Add Segment.

By default, the segments in a scenario are not processed in any specific order. For example, if two segments contain the same element (for example, a Registers element), you cannot by default control which segment will be triggered first; the order depends on variables such as the number of scenario servers that are waiting for events and the speed with which each one processes the events it receives. (For more information, refer to the *ATG Personalization Programming Guide*.) You can change this behavior, however, by specifying a priority level for each segment. If two segments contain the same element, the element within the segment with the higher priority level is triggered first.

Consider the following example:



Between the dates shown in the New Member Email segment, both segments are waiting for a site visitor to register as a new member. However, the priority level of the second segment is higher, so the Registers element in the second segment is processed first.

To set a segment’s priority level, perform the following steps:

1. Right-click the segment’s name.
2. Select Set Segment Priority from the pop-up menu.
3. Type the priority level for this segment. The default value is 0. You can enter negative as well as positive values. Higher values take priority; for example, a segment with priority 2 is processed before segments with priority 0 or -1.

The segment’s priority level is displayed only if the value is other than 0.



Note that a segment’s priority level applies only within its own scenario.

Editing or Deleting Scenario Elements

To change an element that you have included in a scenario, double-click it to make it active and then change it as necessary. The following list shows different ways to navigate through a scenario and edit its elements:

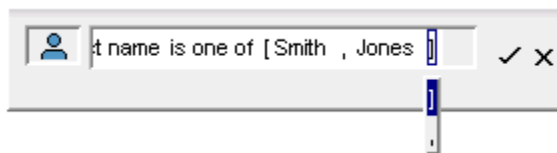
- To move to the next piece of an element, press the right arrow key, the Tab key, or the spacebar.
- To move to the previous piece of an element, press the left arrow key, Shift+Tab, or Shift+spacebar.
- To move to the first element in a segment, press Home. To move to the last element, press End.
- You can copy and paste elements both within a single segment and from one segment or scenario into another. To do this, click the element to copy, and then select Edit > Copy. Click the place where you want to position the copy, and then select Edit > Paste.
- You can also edit elements by right-clicking them and using the edit menu that appears, or by dragging and dropping them. When you drag an element, you can either drag the original element or drag a copy, leaving the original in place. To drag a copy, hold down the Ctrl key while you move the element.
- To delete a single element, click it once to make it editable and then select Edit > Delete.
- To delete a whole scenario segment, click the first element in the segment, and then select Edit > Delete.

Important: If you change or delete a scenario segment that is currently enabled, the Scenarios module may remove from the segment any site visitors who are currently progressing through it. Refer to [Changing an Enabled Scenario](#) for information on possible effects of your action.

Caution: Specifying a Range of Values in an Expression


Some elements can contain expressions for which you specify a range of values separated by commas, for example “People whose last name is one of [Smith, Jones, Garcia].”

In these expressions, **do not type the comma manually**. Instead, select the final bracket so that a menu appears, like this:



Select the comma from the menu, and type the next value as required:



 Last name is one of
[Smith , Jones , Garcia]

The expressions to which this caution applies are “is one of,” “is not one of,” and “includes any of.”

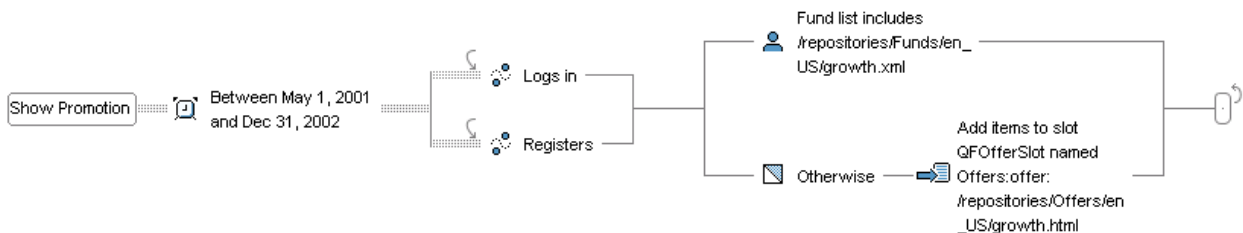
Working with Read-Only Scenarios

Scenarios can be designated as “read only” to prevent accidental editing. If you attempt to open a read-only scenario, a message appears, informing you that you will not be able to make any changes to it. You can, however, copy elements of the scenario for use elsewhere. You can also enable, disable, and delete read-only scenarios.

For more information, refer to [ATG Personalization Programming Guide](#).

Repeating an Element

By default, the system automatically applies a scenario more than once to the same site visitor as long as she meets the criteria that trigger the scenario. Consider the following example from the Quincy Funds demo (the PromoteGrowthFund scenario in the QuincyFunds\InvestorPromotions folder):



In this scenario, the system waits for visitors to register or log in. If the visitor’s fund list does not include a fund called growth.xml, the system displays a message promoting that fund. The scenario is active for a nineteen-month period. If the same visitor logs in again during that period, the system applies the scenario again, displaying the message if appropriate.

The arrows around the portion of the scenario that contains the two forks show that an individual visitor can repeat this scenario. (Note that the first arrow is sometimes larger than the one shown here to accommodate elements that take up more vertical space on the screen. There is no functional difference between the different sizes.)

In many cases, repeat behavior is appropriate. In others it is not. Consider the following example:



In this scenario, the system e-mails a coupon to people who view specific catalog items during a two-month period. However, in this case, the default behavior for repeating a scenario has been turned off, so the system will send the coupon only once to each visitor no matter how many times he views the triggering item.

To turn off the repeat behavior, do the following:

1. Right-click the first element in the segment (the element that shows the name).
2. Deselect the Toggle Allow Individuals to Repeat option from the menu that appears.

The system removes the arrow from the beginning of the scenario (specifically, from before the Views event) and replaces the arrow at the end with a People icon in a grid, as shown below:



You can repeat a whole scenario, and you can also repeat individual Event and Time elements within a scenario, as shown in the following example:



Here, the Time element can occur more than once. In this case, the scenario sends out an e-mail containing a monthly offer on the first day of every month.

Unlike whole segments, individual elements do not repeat by default. You must turn this behavior on. To repeat an individual element:

1. Right-click the element you want to repeat.
2. Select Toggle Multiple Occurrences from the menu.

The system displays arrows at each end of the element to show that it can occur more than once.

Note that you cannot repeat individual elements if the repeat behavior is turned off for the whole scenario.



Using People Elements in Scenarios

Use People elements to filter site visitors by their profile group or according to specific properties in the profile repository.

Element	Use
People whose	<p>Lets you use specific properties in the visitors' profiles as criteria for including them in the scenario. If the property you specify matches the profile, the visitor proceeds to the next element in the scenario.</p> <p>Examples: People whose gender is female People whose Receive email is yes</p>
People in group	<p>Lets you filter visitors according to the profile groups that you set up using the Targeting > Profile Groups window in the ATG Control Center. Visitors who belong to the specified profile group proceed to the next element in the scenario.</p> <p>Example: People in group Brokers</p>
People with profile type	<p>Lets you filter visitors according to any profile types your site developers have set up. Visitors whose profile belongs to the specified type proceed to the next element in the scenario.</p> <p>For more information on profile types, refer to the .</p>
People in organization	<p>Lets you filter visitors according to any Dynamo User Directory organizations you have defined using the People and Organizations > Organizations option. People who belong to the specified organization, either directly or through inheritance, proceed to the next element in the scenario.</p> <p>Example: People in organization Sales</p> <p>For more information on organizations, refer to the ATG Personalization Programming Guide.</p>
People with role	<p>Lets you filter visitors according to any Dynamo User Directory roles you have defined using the People and Organizations > Roles option. People who are assigned to or have inherited the specified role proceed to the next element in the scenario.</p> <p>Example: People with role Administrator</p> <p>For more information on roles, refer to the ATG Personalization Programming Guide.</p>

You can create complex conditions by combining more than one People element. For example, the following scenario sends an e-mail to people who belong to the profile group Investors **and** whose



Receive Email property is set to Yes. It achieves its results by having two People elements, one after the other. The second element applies only to people who have progressed through the first element.



Using Time Elements in Scenarios

The Scenarios module includes four Time elements:

- Wait
- On
- At
- Between

The following sections describe how to use these elements.

Using the Wait Element

Use the Wait element to define the length of time that you want the system to wait for a specified event or before performing a given action.

Note 1: If you include a Registers event element in a scenario, it is highly recommended that you insert a Wait element directly after it and set the amount of time to wait to 5 minutes. This extra wait period ensures that the system has enough time to process the registration before it proceeds to any other elements in the scenario. See [Creating a Scenario: Basic Steps](#) for an example.

Note 2: It is possible to set up repeated timer events that, for example, send an e-mail every week or record an audit trail event every day. (You do this by adding a Wait element to your scenario and turning on the Toggle Multiple Occurrences feature for the Wait element. For more information, see [Repeating an Element](#).) However, if you choose a repetition interval that is very short, for example every minute or every two minutes, be aware that the action after the Wait element may not recur exactly at the expected time. This behavior occurs because the Scenarios module takes a certain amount of time to deliver the internal messages it uses to fire elements. For this reason, it is not recommended that you set up repeated timer events with a very short interval if you require them to occur precisely as scheduled.

Using the On Element

Use the On element to define an exact time when you want a scenario action to occur. This element is an effective way to start a scenario. You can also use it as a filter element in the middle of a scenario, for example at the beginning of a branch in a Fork element. (See [Using Fork Elements in Scenarios](#).)

On elements can have the following variations:



- On date: at a specific date and time, for example on Monday, November 13th at 8:00 am. You could use this element at the beginning of a scenario to specify the day and time you want the scenario to take effect. You could also use it to define a specific date and time for an action – for example, you could use it to send a targeted e-mail at a specific time.
- On weekday: on a specific day of the week, for example on Tuesday. In this example, the system applies the element on the first Tuesday after you enable it, and then repeats it every Tuesday after that.
- On weekday i n month: on a numbered weekday of a given month, for example on the second Tuesday in November. If you keep the scenario enabled, the system repeats the element every year.
- On monthday: on a numbered day of the current month, for example on day 27 of the month. The system applies this element on the next occurrence of the specified day after you enable the scenario. It repeats the element every month on that day.

To select one of these variations, click the small diamond after the word On in the element and select the option you want from the list that appears.

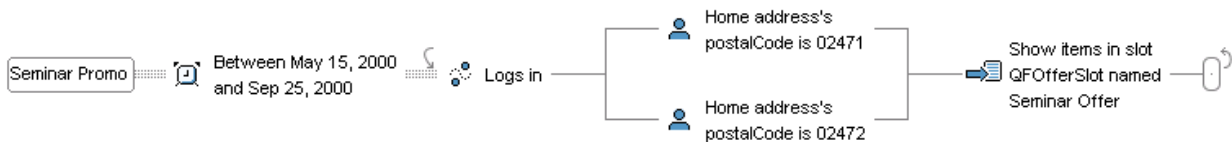
See [Repeating an Element](#) for more information on how to change the default repeat behavior for these and other elements.

Using the At Element

The At element acts as a simpler version of the On Date element, specifying a time of day only. When you include an At element in a scenario and then enable the scenario, the system waits for the next instance of that time and then activates the element.

Using the Between Element

The Between element acts as a filter that defines a period of time during which the elements in a scenario can occur. It is an useful way to start a scenario that you want to be in effect for a limited time only. The following example shows a scenario that offers a seminar-related promotion to visitors from certain areas. The Between element limits the display of the offer to a specific period:



You can use the following variations of the Between element:

- Between times, for example “Between 2 PM and 4 PM.”
- Between dates, for example “Between December 1st 2000 and December 24th 2000.”
- Between dates and times, for example “Between December 1st 2000 at 12:00 am and December 10th at 11:59 PM.”



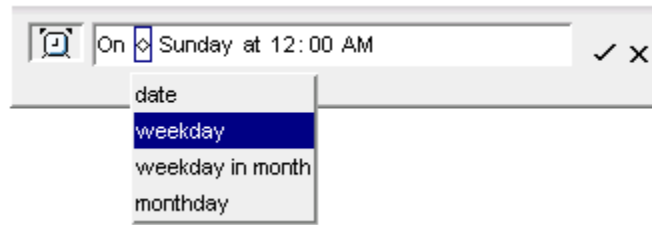
To select one of these variations, click the small diamond after the word *Between* in the element and select the option you want from the list that appears.

In all cases, the element takes effect on the next instance of these dates and/or times after you enable the scenario. The system repeats *Between Times* elements every day. It does not repeat *Between Dates* or *Between Dates and Times* elements unless you specify that you want it to do so. (See [Repeating an Element](#).)

Like *On* elements, you can also use *Between* elements as filters in the middle of a scenario, for example at the beginning of a branch in a *Fork* element. (See [Using Fork Elements in Scenarios](#).)

Editing a Time Element

To change one of the pieces within a *Time* element, click the diamond that appears within the element itself and use the menu that appears. The following image shows the options that appear for the *On* element:



Using Event Elements in Scenarios

This section describes the default *Event* elements you can insert into a scenario segment (see [Creating a Scenario: Basic Steps](#)).

If your application developers have added any custom events, these appear as additional options in the *Events* element in the *Scenarios* task area. For more information, see *Adding Custom Events, Actions, and Conditions to Scenarios* in the [ATG Personalization Programming Guide](#). And, if your product suite includes ATG Commerce, additional Commerce-related events will appear (for example, *Uses Promotion*). For more information on these events, refer to the ATG Commerce documentation.

If you use ATG products in a multisite environment (one in which your installation supports several customer-facing Web sites that share data such as user profiles or shopping carts), you can specify the sites that each event applies to. By default, events apply to all the sites in your system. For example, a *Registers* event is triggered when a user registers on any Web site unless you configure the event to apply to specific sites only. See the [ATG Multisite Administration Guide](#) for information on how to set up a multisite environment.

Note for developers: Scenario *Event* elements are triggered when the *ScenarioManager* component receives events sent as *Dynamo Message System* messages. The optional parameters that appear in the



scenario editor for a specific Event element correspond to the properties of the message bean that represents that event, including properties inherited from any parent classes. For example, the parameters you can select to further define the Logs In event are the properties associated with the DPSTMessageSource component. For technical information on each Event element, refer to *Using Scenario Events* in the [ATG Personalization Programming Guide](#).

A Form is Submitted

The system watches for a visitor to submit a form on one of your site pages, typically by completing one or more text fields and clicking an appropriately named button.

You can use the optional parameters within this element to further define the form whose submission you want to trigger this event.

Parameter	The element is triggered when...
with any attributes	Any form is submitted
where formName	<p>The form whose name you specify is submitted.</p> <p>Example: <i>A form is submitted where formName is decemberSurvey</i></p> <p>The formName value is the name that the page developer gives the form when he or she adds it to a site page. To find the name of a particular form, look at the code for the JHTML or JSP file in which the form is located. Use the Pages area of the ATG Control Center to display the file.</p> <p>If the developer does not give the form a specific name (in other words, if he or she does not provide a formName value, the system uses the form's absoluteName property instead; for example, the formName of the /atg/userprofiling/ProfileFormHandler component defaults to /atg/userprofiling/ProfileFormHandler.</p> <p>For more information on how to spot this value on a page, refer to the ATG Page Developer's Guide.</p>
Where Site Where Site's	<p>A form is submitted on one or more specific Web sites or on a site that matches the criteria you select. If these parameters are not set, the event applies to all Web sites in your system.</p> <p>See Specifying Site Parameters for information on these options.</p>

An Email is Received

The system watches for an e-mail message to arrive. (Specifically, this element watches for e-mail messages to be received by the atg/dynamo/service/POP3Service component.)

You can use this element to monitor incoming e-mails that you receive as part of activity on your Web site. For example, you could use it to set up a scenario that keeps count of the number of e-mail responses



you receive to a targeted e-mail campaign. Alternatively, you could create a scenario that watches for messages with a specific subject line and forwards them to your Customer Service group.

Use the optional parameters within this element as follows:

Parameter	The element is triggered by...
where bounced	The bounced value of the message, which indicates whether the e-mail is one that was returned because it was undeliverable.
where bouncedEmail Address	The e-mail address of the person to whom a bounced message was sent.
where bouncedReplyCode	The RFC 821 reply code of a bounced e-mail. RFC 821 reply codes are part of the Simple Mail Transfer Protocol (SMTP) standard for sending and receiving e-mail. (For more information, refer to http://www.ietf.org/rfc.html .) Example: 550
where bouncedStatusCode	The enhanced RFC 1893 status code of a bounced e-mail. (For more information, refer to http://www.ietf.org/rfc.html .) Example: 5.1.1
where bouncedErrorMessage	The text error message from a bounced e-mail that indicates why a message was refused. Example: <i>User unknown</i> The text is the mail server's interpretation of the enhanced RFC 1893 status code. For information on the text you can specify, please refer to the documentation for the mail server used by your site.
where message	Properties of the content of the message
where messageCc	The e-mail address of the recipient or recipients included in the "CC" field of the message
where messageFrom	The e-mail address of the person who sent the message (the "From" field in an e-mail). Example: <i>An e-mail is received where messageFrom includes atg.com</i> In this case, the system watches for incoming e-mail from the domain atg.com.
where messageRecipients	Any e-mail address in either the "To" or "CC" fields
where messageReplyTo	The Reply-To e-mail address of the message



Parameter	The element is triggered by...
where messageSubject	The subject line of the message. Example: <i>An e-mail is received where messageSubject is Enroll me!</i>
where messageTo	The e-mail address of the recipient or recipients of the message (the "To" field in an e-mail)
where originalSubject	The original subject line of the message. The original subject is the subject line without the word "Re:" that may be added if this e-mail message is a response to another. Example: <i>An e-mail is received where originalSubject is Come back, we miss you!</i> In this case, an incoming message with the subject line <i>Re: Come back, we miss you!</i> will trigger this element.
where receivedDate	The date on which the message was received

Clicks a Link

The system watches for a site visitor to follow a link from one site page to another. This element is specifically designed for scenarios in which you want to track aspects of visitor navigation through your sites. For example, you might want to record the number of times that visitors display a given set of pages during a specified time period, or keep track of the links that visitors follow most often from a given page.

This element is similar to the Visits element (see below), except that the Clicks a Link element works only for links that page developers have set up with an anchor tag that includes a `dsource` parameter. The following shows an example of the JSP code that a page developer would add to a site page for this type of link:

```
<dsp: a href="content/welcome.jsp" >
  <dsp: param value="OnSale, MemberDiscount" name="dsource" />
  Click here to see this month's discounts!
</dsp: a>
```

The values that the page developer specifies for the `dsource` parameter (in the example, `OnSale` and `MemberDiscount`) can be any text that he or she chooses. The system uses them to identify and distinguish the links. For example, the page developer might give several links the same `dsource` value to identify that they belong to a similar group, such as links that point to a specific set of content pages. (Note that `dsource` is the default name for this parameter, but developers may change it. To see the parameter name for a given link, display the page containing the link in the Pages and Components area of the ATG Control Center.)

The Clicks a Link element contains the following optional parameters:



Parameter	The element is triggered when...
anywhere	A site visitor clicks any link whose anchor tag contains a dsource parameter.
from page	A site visitor clicks any dsource link on the specified page. Examples: Clicks a link from page named /welcome.jsp Clicks a link from page in folder /content/today/
to page	A site visitor clicks any dsource link that goes to the specified page. Examples: Clicks a link to page named /thismonthonly.jsp Clicks a link to page in folder /content/monthlyspecials
where source name list	A site visitor clicks a link containing a specific dsource parameter. Examples: Clicks a link where source name list includes OnSale. Clicks a link where source name list includes any of [OnSale, MemberDiscount, MonthlyPromo]

You can also use this element for links that you include in e-mail messages that you send to site visitors (for example, as part of a promotional campaign). Make sure that the link contains a dsource parameter as shown above.

Note that in a multisite ATG environment, pages typically exist on more than one Web site. For example, you could have several sites that all use the same login.jsp page. The page would include code that showed different content for each site. If you have a link on a page that is common to several sites, the Clicks A Link event will be triggered for all sites. To avoid this behavior and have the event apply to specific sites only, include an Event's Site... condition element after the Clicks a Link event, as shown:

Clicks a Link > Event's Site Is ATG Home

Dynamo Shuts Down

The system watches for the ATG server to shut down.

Dynamo Starts

The system watches for the ATG server to be started.

Is Referred by External Site

The system watches for a visitor to arrive at your site or at a specific page on the site by clicking a link from a site or page with given attributes (for example, a specific URL).



Examples:

Is referred by external site where referrerURL is

http://www.example.com/products/shoes.jsp

Is referred by external site where referrerSite is www.example.com

Is referred by external site where referrerPage is /products/shoes.jsp

Note that this event can be used to track arrivals both from external sites and from pages within your own Web site.

Parameter	The element is triggered when...
with any attributes	The visitor Is referred by any other site, including sites that are not part of an ATG multisite environment
where <i>attributes</i>	See the examples above.
Where Site Where Site's	<p>The visitor Is referred by one or more specific ATG-registered Web sites or by a registered site that matches the criteria you select. ("Registered" sites are those supported by an ATG multisite environment.)</p> <p>Example:</p> <p>Is referred by external site where Site is ATG Home</p> <p>See Specifying Site Parameters for information on these options.</p>

Items Requested

The system watches for a visitor to perform an action on the site (for example, visit a given page) that causes an active slot to request content items. See [Using Slots](#) for more information.

You must specify the slot that you want to use to trigger this element. To do this, use the By Slot parameter within this element to select an existing slot. Example: *Items requested by slot TodayOnly*. This example tells the system to watch for a visitor to perform an action that causes a slot named TodayOnly to request content items.

Bear in mind that in a multisite environment, the slot may exist on more than one Web site.

Logs In

The system watches for a visitor to log into your site (typically through a Login page that contains ID and password fields set up by your site developers).

Parameter	The element is triggered when...
with any attributes	A site visitor logs into any Web site supported by your system.



Parameter	The element is triggered when...
Where Site Where Site's	A visitor logs into one or more specific Web sites or into a site that matches the criteria you select. If these parameters are not set, the event applies to all Web sites in your system. See Specifying Site Parameters for information on these options.

Logs Out

The system watches for a visitor to log out of your site (typically by clicking a Log Out button set up by your site developers).

Parameter	The element is triggered when...
with any attributes	A site visitor logs out of any Web site supported by your system.
Where Site Where Site's	A visitor logs out of one or more specific Web sites or out of a site that matches the criteria you select. If these parameters are not set, the event applies to all Web sites in your system. See Specifying Site Parameters for information on these options.

Profile Property Updated by Admin

The system watches for an administrator to change a specific property in a user's profile (or in a group of profiles), typically through a batch profile change form on your site. See also the description of the [Profile Updated by Admin](#) element.

Note that this event is not triggered if an administrator changes a profile through the ATG Control Center.

Profile Property Updated by User

The system watches for a visitor to change one of the values in his or her profile, typically through a form that page developers have set up for this purpose on your site. For example, a visitor might use an Edit My Profile form on your site to change her home address or product preferences.

Use the optional parameters in this element to define the type of change that you want to trigger the element. The parameters that you can choose correspond to properties in the Profile repository.

Examples:

- Changes Marital status from single to married*
- Changes Home address's city to Boston*
- Changes Interests by removing dancing*



See also the description of the [Profile Updated by User](#) element.

Profile Registered by Admin

The system watches for an administrator to register a user or a group of users at your site (typically by completing a batch registration form).

Parameter	The element is triggered when...
with any attributes	The administrator registers a user at any Web site supported by your system.
Where Site Where Site's	The registration occurs on one or more specific Web sites or on a site that matches the criteria you select. If these parameters are not set, the event applies to all Web sites in your system. See Specifying Site Parameters for information on these options.

Profile Updated by Admin

The system watches for an administrator to change or delete a user profile or a group of profiles, typically through a batch profile update form that page developers have added to your site.

Note that this event is not triggered if an administrator changes a profile through the ATG Control Center.

Profile Updated By User

The system watches for a visitor to change his or her profile. This element is similar to the Updates Profile Property element described above, except that here the scenario watches for any change to a profile rather than watching for a change to a specific property.

Registers

The system watches for a previously anonymous visitor to register at your site (typically by completing a registration form set up by your site developers).

Note: If you include a Registers event element in a scenario, it is highly recommended that you insert a Wait element directly after it and set the amount of time to wait to 5 minutes. This extra wait period ensures that the system has enough time to process the registration before it proceeds to any other elements in the scenario. See [Creating a Scenario: Basic Steps](#) for an example.

Parameter	The element is triggered when...
with any attributes	A visitor registers at any Web site supported by your system.



Parameter	The element is triggered when...
Where Site Where Site's	A visitor registers at one or more specific Web sites or at a site that matches the criteria you select. If these parameters are not set, the event applies to all Web sites in your system. See Specifying Site Parameters for information on these options.

Session Ends

The system watches for a site visitor to leave the site (or for his or her session to expire).

Parameter	The element is triggered when...
with any attributes	A session ends on any Web site supported by your system.
Where Site Where Site's	A session ends on one or more specific Web sites or on a site that matches the criteria you select. If these parameters are not set, the event applies to all Web sites in your system. See Specifying Site Parameters for information on these options.

Session Starts

The system watches for a site visitor to access the site (or to start a new session).

Parameter	The element is triggered when...
with any attributes	A session starts on any Web site supported by your system.
Where Site Where Site's	A session starts on one or more specific Web sites or on a site that matches the criteria you select. If these parameters are not set, the event applies to all Web sites in your system. See Specifying Site Parameters for information on these options.

For more information on configuring a multisite ATG environment, refer to the [ATG Multisite Administration Guide](#).

Switches Site Context

The site context identifies the current site in a multisite environment. With this event, the system watches for the site context to change, which indicates a visitor has navigated from one of your registered Web sites to another.



Parameter	The element is triggered when...
with any attributes	A visitor switches to or from any Web site that is supported by your system.
Where Site is switched to	A visitor switches to a Web site that meets the criteria specified. Example: <i>Switches site context where site is switched to is ATG Home</i>
Where Site is switched from	A visitor switches from a Web site that meets the criteria specified.
Where Site is switched to's	The options you can specify correspond to the properties set for the site in the Site Administration utility. See Specifying Site Parameters .
Where Site is switched from's	

For more information on configuring a multisite ATG environment, refer to the [ATG Multisite Administration Guide](#).

Note: The scenario editor includes a Site Visit event, which is used by ATG Customer Intelligence to gather data for reports. The event is not intended to be used for tracking activity related to registered sites in a multisite ATG environment.

Visits

The system watches for a visitor to display specific pages. You can use the optional parameters to define the pages that you want to trigger this Event element.

Examples: *Visits any page*

`Visits a page named Quincy Funds J2EE DAF Demo: /en/mypreferences.jsp`

`Visits a page in folder Pioneer CyclingJSP: /en/catalog`

Visits elements work for any page that a visitor specifically requests for display on the site (for example, by clicking a link that leads to that page). However, there are some circumstances in which a page request does not trigger a Visits element because it does not involve specifically requesting that page from the system. For example, in the Quincy Funds demo, the `investorhome.jsp` page is displayed within the `index.jsp` page by way of code that looks at the visitor's `userType` profile property. Visitors never request `investorhome.jsp` directly. When you include a page in a Visits element, make sure that page is one for which visitors can issue a specific display request.

It is also important to be aware that in a multisite environment, the same pages typically exist on all your registered Web sites. (The pages contain code that causes different content to appear on each site as needed.) For example, the ATG Commerce Reference Store demo contains one `login.jsp` page that appears on three sites: ATG Home, ATG Store, and ATG Store Germany. If you select this page, the event will be triggered when a customer visits the login page on any of these sites. In this case, to restrict the event to one site, you can add an `Event's Site` condition element that specifies the site, as shown:



Visits a page named ATG Commerce Reference Store: /myaccount/login.jsp
> Event's Site is ATG Store

Note: When you select the options *Visits a page named...* or *Visits a page in folder...*, you are prompted to select a page or folder from a list of available choices. The ATG Control Center automatically prepends the necessary path information for the item (the path includes either the ATG document root or, for J2EE applications, the context root). By contrast, if you select *Visits page with Dynamo path* or *Visits page in Dynamo folder*, you must type the fully qualified path to the page or folder yourself. These latter options exist mostly for backwards compatibility and replicate the way users specified document paths in earlier versions of the product. It is recommended that you use *Visits a page named...* or *Visits a page in folder...* if you have any doubt about the path of the item you want to use in this element.

Views

The system watches for a site visitor to view an item from a content repository. You can use the optional parameters within this element to specify the exact items or repositories that trigger this event.

Example: *Views any item*. This example tells the system to watch for a visitor to view any item from any repository.

Example: *Views an item from Funds whose Aggressive Index is 3*. An element that you set up this way tells the system to watch for a visitor to view any item from the given repository (Funds) that has its Aggressive Index property set to 3.

In a multisite environment, you can use an Event's Site condition element to constrain the event to one or more specific sites. See the description of the [Visits](#) element for more information.

GSA Repository Cache Invalidation Received

The system watches for a repository item to be flushed from the cache by the JMS Distributed Cache Invalidation Service. For more information, refer to *Using Scenario Events* in the [ATG Personalization Programming Guide](#). You can use the optional parameters to specify the repository items you want to use to trigger this event.

- `itemDescriptorName` – a specific item type. The invalidation of cached items of that type triggers this event.
- `repositoryPath` – The Nucleus address of a cached GSARepository component. Invalidation of the entire repository triggers this event.
- `itemId` – The ID of a specific cached repository item. Invalidation of that item triggers this event.

Profile Marker Added

This scenario element detects when a Profile Marker Manager adds a marker to a profile.

You can use the optional parameters within this element to define the event that triggers this scenario element.



Parameter	The element is triggered when...
where eventDate	The marker is added on the date and time you specify.
where markedItemID	The marker is added to the profile whose ID you specify.
where markedItemType	The marker is added to an item of the particular repository item type you specify.
where parentSessionID	This event occurs during the session you specify.
where profileID	The marker is added to the profile whose ID you specify.
where repositoryName	The marker is added to an item that uses the repository you specify.
where sessionID	The marker is added during the session you specify.
where markerAddedData's	The marker being added has the creation date, data, key, marker ID, repository item type or value you specify.

For more information on the ProfileMarkerAdded event, see the *Marking a User Profile* section in the *Using Profile Markers* chapter of the [ATG Personalization Programming Guide](#).

Profile Marker Removed

This scenario element detects when a Profile Marker Manager removes a marker from a profile.

You can use the optional parameters within this element to define the event that triggers this scenario element.

Parameter	The element is triggered when...
where eventDate	The marker is removed at the date and time you specify.
where markedItemID	The marker is removed from the profile whose ID you specify.
where markedItemType	The marker is removed from the particular repository item type you specify.
where parentSessionID	This event occurs during the session you specify.
where profileID	The marker is removed from the profile whose ID you specify.
where repositoryName	The marker is removed from an item in the repository you specify.
where sessionID	The marker is removed during the session you specify.
where markerRemovedData's	The marker being removed has the creation date, data, key, marker ID, repository item type or value you specify.



For more information on the ProfileMarkerRemoved event, see the *Removing Profile Markers* section in the *Using Profile Markers* chapter of the [ATG Personalization Programming Guide](#).

Profile Marker Replaced

This scenario element detects when a Profile Marker Manager replaces one profile marker with another.

You can use the optional parameters within this element to define the event that triggers this scenario element.

Parameter	The element is triggered when...
where eventDate	The marker is replaced at the date and time you specify.
where markedItemID	The marker being replaced was attached to the profile with the ID you specify.
where markedItemType	The marker being replaced was attached to an item of the particular repository item type you specify.
where parentSessionID	This event occurs during the session you specify.
where profileID	The marker being replaced was attached to the profile whose ID you specify.
where repositoryName	The marker being replaced was attached to an item in the repository you specify.
where sessionID	The marker is replaced during the session you specify.
where markerAddedData's	The marker being added has the creation date, data, key, marker ID, repository item type or value you specify.
where markerAddedData's	The marker being replaced has the creation date, data, key, marker ID, repository item type or value you specify.

Business Process Stage Reached

The system watches for a stage in a business process to be reached.

Parameter	The element is triggered by...
with any attributes	Any business process stage is reached
where BusinessProcessName	A business process stage is reached in the business process Example: <i>Business Process Stage Reached where</i>



	businessProcessName is ShoppingProcess
where BusinessProcessStage	The business process stage whose name you specify is reached. Example: <i>Business Process Stage Reached where businessProcessStage is AddedToCart</i>
where BusinessProcessStageSequence	The business process stage whose sequence number you specify is reached. The sequence number is an integer. Example: <i>Business Process Stage Reached where businessProcessStageSequence is 2</i>

For more information, see the *Defining and Tracking Business Processes* chapter in the [ATG Personalization Programming Guide](#).

Specifying Site Parameters

If you have a multisite ATG environment (one in which a single ATG installation supports several Web sites that share items such as user profiles and shopping carts), you can configure many of the scenario events described in this chapter so they apply only to specific sites. For example, you can configure a *Logs In* event so it is triggered when a visitor logs into Site A but not when a visitor logs into Site B. By default, events apply to all sites in your system.

Examples:

Logs in where Site is ATG Home

Registers where Site is one of ATG Home, ATG Store Germany

There are two parameters you can use to create site-specific scenario events: *Where Site* (shown in the examples above) and *Where Site's*. See the sections that follow for information on how to use each one.

Only Web sites that have been registered in the Site Administration utility and deployed appear as options in scenario events. For more information on Site Administration, refer to the [ATG Multisite Administration Guide](#).

Using the Where Site Parameter

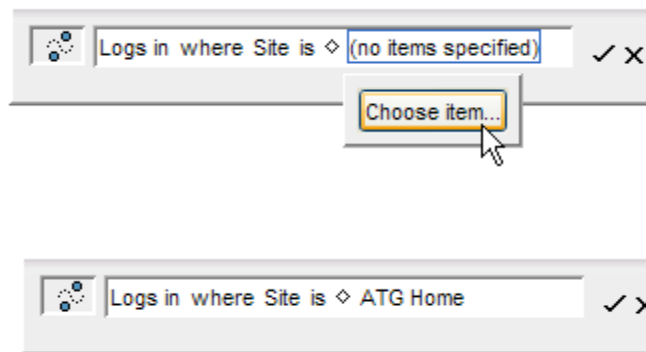
Use the *where Site* parameter to specify one or more Web sites to which you want the event to apply. If you do not specify any sites, the event applies to all Web sites in your system.

To pick one or more sites from a list, complete the following steps:

1. Select *where Site*.
2. Select an operator (for example *is*, *is not*, *is one of*).
3. Select *item*.

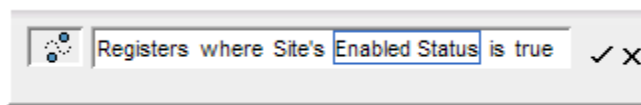


4. Click No Items Specified and then click Choose Item (see the image below). The Site dialog box appears.
5. Click List to show all the sites registered with Site Administration.
6. Select the site you want.
7. Click OK.



Using the Where Site's Parameter

When you register a Web site with Site Administration, you provide values for a number of configuration properties that define the site and are stored in the Site repository. Examples include the site's name, an opening date for when the site becomes active, and a status showing whether the site is currently enabled or disabled. The Site's parameter allows you to use these properties as triggers for firing the event.



For information on each property, refer to the [ATG Multisite Administration Guide](#).

Using Condition Elements in Scenarios

Condition elements follow and further qualify an Event element, essentially adding an "if" statement to it. The options that appear for the condition vary according to the event.



Element	Use
Event's	<p>Uses properties of the associated ATG event to qualify the scenario Event element. See Using Event Elements in Scenarios for more information.</p> <p>Note that the Event's condition contains a Site option. This option exists for environments that support more than one Web site. It allows you to qualify the event by site. See the description of the Visits event for an example.</p>
Variable	<p>Qualifies the event using a variable that you defined earlier in this segment. (You use Set Variable Action elements to define variables. See Using Action Elements in Scenarios for more information.)</p>
Request's	<p>Qualifies the event using the contents or characteristics of the HTTP request issued to the ATG system by the visitor's Web browser.</p>
Browser's	<p>Qualifies the event according to a characteristic or setting of the site visitor's Web browser. Example:</p> <p>Browser' s supports cookies is true</p>
Locale's	<p>Adds a locale-related qualification to the event.</p> <p>Locale-related elements are relevant if you are working on a Web site that displays content in different languages depending on the language setting in a visitor's browser. For more information about localization and internationalization, refer to the ATG Programming Guide.</p>
Today's	<p>Uses a specific date or time to qualify the event. Example:</p> <p>Today' s dateAsDate is after Dec 1, 2001, 12:00 AM</p> <p>For more information, refer to the next section, Using the Today's Condition.</p>

Using the Today's Condition

This section explains the choices available for the Today's condition element in the scenario editor. The choices correspond to the properties of the CurrentDate Nucleus component (/atg/dynamo/service/CurrentDate). The Scenarios module uses the property values of this component to calculate whether to apply the condition to a given scenario. You can view this component and its current values if you have access to the Pages and Components area of the ATG Control Center. For information about viewing components, refer to the ATG Control Center online help.

The properties that are most useful for business managers to specify within the Today's condition are described below.

Property	Description	Example
date	An integer that represents the day of the month (1 to 31)	Today' s date is 4



Property	Description	Example
dateAsDate	<p>An integer that represents the date as a month, day, year, and time. This option is a good choice if you want to use a specific date to trigger the scenario element. The system time in this case is always considered to be 12:00:00 AM, and the scenario editor ignores any time you specify in the element. For example, if you include the following value in the scenario:</p> <p>Today' s dateAsDate i s Jan 10, 2004, 9: 00 AM</p> <p>the scenario editor translates the value to the following:</p> <p>Jan 10, 2004, 00:00:00 AM EST</p> <p>and triggers the condition element when the system's dateAsDate is Jan 10, 2004, 12:00:00 AM EST.</p>	<p>Today' s dateAsDate i s Oct 4, 2003, 12: 00: 00 AM EST</p>
dayOfWeek	An integer that represents the day of the week (1 to 7, with 1 representing Sunday by default)	Today' s dayOfWeek i s 5
dayOfWeekInMonth	An integer that represents the occurrence of the day of the week in the month (1 to 5). For example, to specify the first occurrence of any weekday in the month, enter 1.	Today' s dayOfWeekInMonth i s 1
dayOfWeekName	The full name of the day of the week	Today' s dayOfWeekName i s Thursday
hour	An integer that represents the hour of the day (0 to 23, with 23 representing 11 PM)	Today' s hour i s 16
minute	An integer that represents the minute of the hour (0 to 59)	Today' s minute i s 30
month	An integer that represents the month of the year (1 to 12)	Today' s month i s 10
monthName	The full name of the current month	Today' s monthName i s October
second	An integer that represents the second of the minute (0 to 59)	Today' s second i s 15



Property	Description	Example
shortDayOfWeekName	The abbreviated name of the day of the week (Sun, Mon, Tue, Wed, Thu, Fri, Sat)	Today' s shortDayOfWeekName i s Thu
shortMonthName	The abbreviated name of the month (Jan, Feb, Mar, Apr, May, Jun, Jul, Aug, Sep, Oct, Nov, Dec)	Today' s shortMonthName i s Oct
weekOfMonth	An integer that represents the week of the month (1 to 5)	Today' s weekOfMonth 1
year	The current year	Today' s year i s 2004

Specifying a Date or Time as a Condition

Time elements (At, On, Between) allow you to specify a date or time that a scenario element should occur. For more information, see [Using Time Elements in Scenarios](#). In addition, you can also include the date and time as qualifying conditions within some other scenario elements. The Today's condition element, described in the previous section, is one example. Other examples of elements that can include time as conditions are as follows:

People whose date of birth is before Jan 1, 1970 12:00 AM

People whose registration date is after July 1, 2004 12:00 AM

Note that, if you use "is" with a date and time expression, the value you specify must match exactly the value in the visitor's profile. Consider the following example:

People whose last activity is Jan 1, 2004 12:00 AM

Here, only those visitors whose Last Activity property has an exact value of Jan 1, 2004 12:00:00 AM will be included in the scenario.

Using relative dates with the expression "is" requires caution for the same reason. Consider the following:

People whose registration date is 2 days ago

Here, only those visitors whose registration date (including its millisecond value) exactly matches the date and time 48 hours ago will be included in the scenario. A better way to specify this relative date expression is as follows:

People whose registration date is after 2 days ago and before 1 days ago

It may be helpful to use the People and Organizations > Users window in the ATG Control Center to check that your date and time conditions will produce the results you expect. Use the date and time values you specified in the scenario as the List criteria at the top of the Users window; the profiles that are displayed when you click the List button, correspond to the registered visitors who will be included in this scenario.



If no profiles appear, you may have specified the values incorrectly. Change the List criteria to Items of Type User (Any Item) and examine the way the date and time are specified in the property you want to use in the scenario.

Profile Marker Conditions

The profile marker conditions determine whether the active profile contains markers that have the key, value, and data property values you specify.

For more information on the conditions described in this section, see the *Using Marked Profiles* section in the *Using Profile Markers* chapter of the [ATG Personalization Programming Guide](#).

Profile Has a Marker

The Profile has a Marker condition checks the active user profile for a marker that matches the criteria you provide. For example, you can configure the condition to check for profile markers that have the key, value or data values you specify in the Type a String text box. If you'd prefer to keep a broad scope, use the any value setting for a parameter, indicating that its value isn't used to narrow the scope of the condition. Setting key, value, and data to any value at the same time causes the scenario to advance when any profile markers are present on the active profile. You can set value and data to NULL if you'd like the condition to check for markers that have no values for these properties.

Profile's Last Marker Has

The Profile's Last marker has condition checks the last marker added to the active user profile for the key, value, or data values you specify. To specify a particular value for one of these three properties, select Type a String and enter the value. You can set value or data to NULL in order to configure the condition to watch for profile markers that don't have values for these properties. Keeping a property set to any value indicates that its value isn't used to narrow the scope of the condition.

Profile's Last Marker With Key

The Profile's Last marker with key condition monitors the last marker added to the active user profile that has the key you specify. You must include a value for the key property, but you can also include a value for value and data properties by selecting Type a String and entering the value. Another option is to set the properties to NULL so that only markers that don't have values for these properties cause the scenario to advance. Keeping an element set to any value indicates that its value isn't used to narrow the scope of the condition.

Business Process Stage Conditions

You can also use condition elements that depend on an object's stage in a business process. For more information, see the *Defining and Tracking Business Processes* chapter in the [ATG Personalization Programming Guide](#).

Has Reached Stage

The Has Reached Stage condition tests whether a business object has reached a business process stage. Example:



Has Reached Stage with process name= ShoppingProcess and stage = Browsed

Most Recent Stage Reached

Tests whether the business process stage most recently reached matches the specified stage. Example:

Most recent stage reached for process name= ShoppingProcess is
stage = AddedToCart

Using Action Elements in Scenarios

This section describes the default Action elements you can insert into a scenario segment (see [Creating a Scenario: Basic Steps](#)).

If your application developers have added any custom actions, these appear as additional options in the Action element in the Scenarios task area. For more information, see *Adding Custom Events, Actions, and Conditions to Scenarios* in the [ATG Personalization Programming Guide](#). Additional options also appear if your product suite includes ATG Commerce. For more information on Commerce-related actions, refer to the ATG Commerce documentation.

Note: Several of the action elements described in the following sections include a with Dynamo path... option (for example, Send email with Dynamo path...). This option exists mostly for backwards compatibility and replicates the way users specified document paths in earlier versions of the product. If you choose this option, you must type the fully qualified path, including the ATG document root or the J2EE context root, to the page you want to use. The alternative option, with path... (for example, Send email with path...), does not require you to type the path but instead allows you to select the page from a list. The ATG Control Center then prepends the appropriate path information automatically.

Set Variable

The Set Variable action defines a named variable that you can use to store or mark information temporarily in a scenario. For example, you could create a scenario that watches for people to buy products between 12 and 3 AM and then sets a variable called Late Night Shopper to "true." You could then include a Record Audit Trail element that tracks the number of people whose Late Night Shopper variable is set to "true" and use the data you collect to create a report.

Note that scenario variables apply only to the segment in which you set them; you cannot set a variable in one scenario and then use that same variable in another scenario to trigger an event.

Variables can be any of the following types:

- string – any characters you enter, for example "test" or "item purchased"
- long – any integer you choose
- double – any number with a floating point value that you choose
- flag – true or false
- date – any month, date, and year that you specify



Send Notification

The Send Notification action sends a specified e-mail message to a given recipient or group of recipients. It is designed for business situations in which you want to notify a person or group in response to an earlier event in the scenario. For example, you might want to notify your Sales department if a site visitor displays a page showing pricing information about a new product. By contrast, the Send E-mail action (described later in this chapter) is designed for situations in which you want to send a message as part of an e-mail campaign to a targeted group of site visitors.

You can define the recipients of the Send Notification action as users (people with user profiles in the Profile repository) or e-mail addresses. Use the Send notification to people... option if the recipient is part of your system and has a profile; use the Send notification to address option if the recipient does not have a profile in your system.

Examples:

```
Send notification with path Example Corps Web App: /news/update.jsp to
people Mary Garcia
```

```
Send notification with path Example Corps Web App: /news/update.jsp to
addresses esmith@example.com, swerner@example.com
```

The profile associated with the message is by default the profile of the recipient. For that reason, any content in the message that uses a profile will refer to the recipient's profile. For information on other options, refer to the [ATG Personalization Programming Guide](#).

If the action follows an event that is site aware (for example, Logs In or Registers), you can also specify a Web site so that the notification message can contain site-specific references.

```
Registers where Site is MyStore > Send notification with path Example
Corps Web App: /en/newMember.jsp to people Mary Garcia with site Event's
Site
```

In this example, the site specified in the Registers event, MyStore, is picked up by the Send Notification action (Event's Site is MyStore) and can be used to customize the content of the Send Notification message:

"Alert: New member registered today at MyStore."

Page developers use the Pages and Components > Pages area of the ATG Control Center to create the text for the e-mail messages. For more information, see [Working with Targeted E-Mail](#).

For information on how to send an attachment with the e-mail message, see *Sending Attachments with Scenario-Based E-Mail Messages* in the [ATG Personalization Programming Guide](#).

Change

The Change action changes a specified property in the visitor's profile.

Example:



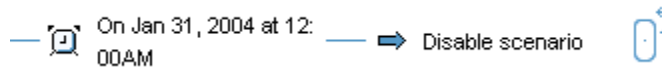
Change Person's interests to skating

You can also use this element to change any variables that you set earlier in the scenario.

Disable Scenario

The Disable Scenario action prevents any further processing of elements for the given scenario. All site visitors passing through the scenario when the element is triggered are removed from the scenario. The effect of this action element is the same as disabling a scenario manually through the File menu; for more information, refer to [Disabling a Scenario](#).

Example:



If a scenario is disabled as a result of this action, the Last Modified By column in the Scenarios window shows "System" for this scenario.

Redirect Page

The Redirect Page action sends visitors to a different page on your site.

Examples:

Redirect to page with path Example Corps Web
App: /errors/RegistrationError.jsp

Note: When you add a Redirect action to a scenario, make sure that the action does not conflict with any other redirect activity that may be occurring on the site. For example, if you design a scenario that redirects users after a Login event, make sure your login pages do not perform their own redirect as well. Conflicting redirects could cause unexpected behavior to occur.

Send Email

The Send Email action sends a specified e-mail message to the visitors who have reached this point in the scenario. (See also the Send Notification action above.)

Example: Send e-mail with path ATG Commerce Reference
Store: /email templates/newPassword.jsp

Page developers use the Pages and Components > Pages area of the ATG Control Center to create the text for the e-mail messages. For more information, see [Working with Targeted E-Mail](#).

If the action follows an event that is site aware (for example, Logins or Registrations), you can also specify a Web site so that the e-mail message can contain site-specific references. Example:



```

Logs in where Site is ATG Home > Send e-mail with path ATG Commerce
Reference Store: /email templates/backInStockNotify.jsp with site
Event's Site
    
```

In this example, the site specified in the Logs In event, ATG Home, is picked up by the Send Email action (Event's Site is ATG Home) and can be used to customize the content of the e-mail message:

"Welcome back! The item you backordered on ATG Home is ready to ship."

For information on how to send an attachment with the e-mail message, see *Sending Attachments with Scenario-Based E-Mail Messages* in the [ATG Personalization Programming Guide](#).

Add Items to Slot

Use the Add Items to Slot action to display content (or any other repository) items in a given slot. Specify the slot to use and the items to show in it. Example: Add Items to Slot ProductSlot named Springtrak Shatterproof Helmet, Arri bia Bike Shorts, Springtrak Insulated Water Bottle

You can also specify an existing targeter instead of a list of content items. In this case, the system uses the criteria in the targeter to define the content items to display.

In some cases you may be working in a multisite ATG environment (one in which a single installation of ATG products supports more than one Web site). Typically in such an environment, all sites contain the same pages (for example, all sites contain the same login page). A slot could therefore exist on all your Web sites. Make sure you configure the action so the slot displays content that is appropriate for each site.

For more information, see [Using Slots](#).

Remove Items from Slot

Use the Remove Items from Slot action to clear items that you previously included in a slot. For more information, see [Using Slots](#).

```

Example: Remove items from HomePageSlot named helmet.gif
    
```

Record Event

Use the Record Event action to track data for inclusion in reports. Allows you to track a scenario event or action and store information about it in a specified dataset.

```

Example: Record event Logs In in dataset /logins.xml
    
```

Record Audit Trail

Use the Record Audit Trail action to track data that monitors scenario activities. See [Recording Scenario Activity](#) for more information.



Add Marker To Profile

Use the `AddMarkerToProfile` action when you want to create a marker and attach it to the active user profile. When you use this action, you must specify a `key`, which will be the value saved to the marker's `key` property. You can also provide values for the `value` and `data` properties or keep them empty (NULL).

In addition, you need to indicate whether the marker you're adding must be unique or if duplicate markers are permitted. If your application accepts unique markers only, you need to determine how new duplicate markers are handled: if a marker exists, should it be replaced by an identical new one or should the new one be discarded? The options available to you are `allow duplicates`, `replace duplicates`, and `don't add if there are duplicates`.

Remove All Markers From Profile

Use the `RemoveAllMarkersFromProfile` action when you want to delete all markers from a particular property on the active user profile.

Remove Markers From Profile

Use the `RemoveMarkersFromProfile` action when you want to remove markers that have a particular key from the active user's profile. You can further describe the markers you want to remove by specifying the values they must have for their `value` or `data` properties. For example, you can set this action to remove all markers that have `key A`, `value B` and `data C` from the active profile. You can also indicate that you want all markers that don't have values set for `value` and `data` by setting them to NULL. If you'd rather not limit the markers you remove based on `value` and `data` values, keep these elements set to any `value`, indicating that their values aren't used in determining marker removal.

Add Stage Reached

The `Add Stage Reached` action adds a business process stage to an item. You need to have defined the business process and its stages, as described in the *Defining and Tracking Business Processes* chapter in the [ATG Personalization Programming Guide](#). Example:

```
Add stage reached with process name = ShoppingProcess and
stage = ShippingInfoComplete
```

Note that you can instead use the `AddBusinessProcessStage` servlet bean to do the same thing in a page.

Remove Stage(s) Reached

The `Remove Stage(s) Reached` action removes a business process stage from an item. Example:

```
Remove stage(s) reached with process name = ShoppingProcess and
stage = ShippingInfoComplete
```

You can also remove all stages from the item, as in this example:



Remove stage(s) reached with process name = ShoppingProcess
and stage = any value

Note that you can instead use the RemoveBusinessProcessStage servlet bean to do the same thing in a page.

Using Fork Elements in Scenarios

As described earlier, fork elements add parallel “if” conditions, allowing you to divide a scenario into separate branches and treat each branch differently. You add Fork elements to a scenario in the same way that you add other elements, but their extra features mean that you work with them a little differently.

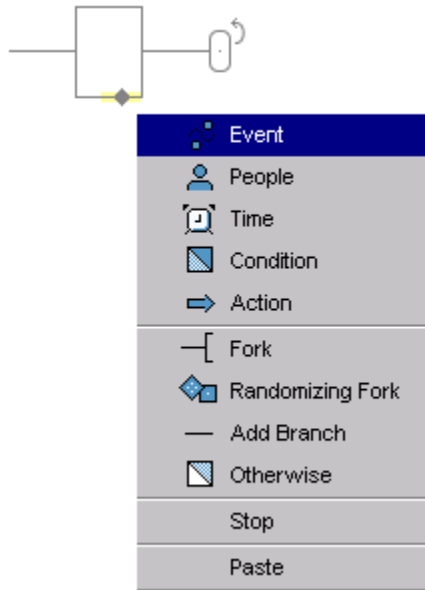
Adding Forks to a Scenario

To add a fork to a scenario segment, click the diamond on the connector line where you want to position the fork, and select Fork from the menu.

Alternatively, to add a fork around an existing element, drag the connector line before the element to the connector line after the element. A fork appears, with the existing element on one of the new branches.

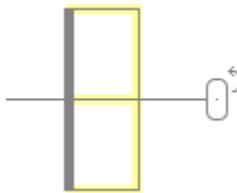
Adding Elements to a Fork

To add elements to a fork, point the mouse at one of the branches so that a diamond appears on it. Click the diamond and select the appropriate option from the menu that appears:



Editing or Deleting a Fork Element

To select a Fork element for editing or deleting, click its left side so that a gray line appears and the element turns yellow:



Then change the element as necessary. To delete it, select Edit > Delete.

Adding Branches to a Fork

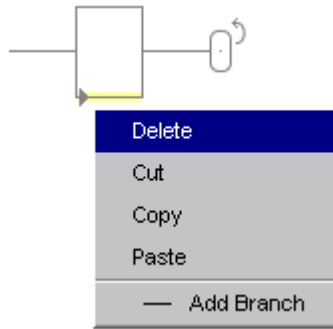
By default, all Fork elements have two branches. To add more branches, point the mouse at one of the existing branches so that a diamond appears on it. Click the diamond and then select Add Branch from the menu that appears.

Alternatively, move the mouse to any empty area inside the Fork element so that a triangle with a dotted line appears. Click the triangle to add a new branch.



Deleting Branches

To delete a single branch, point the mouse at the left end of the branch so that a triangle appears on it, and right-click the triangle. Then select Delete from the menu that appears. (Note: Each Fork element must have at least two branches; if you perform this action in a fork that has only two branches, it deletes the whole fork and inserts any elements it contained into the main segment.)



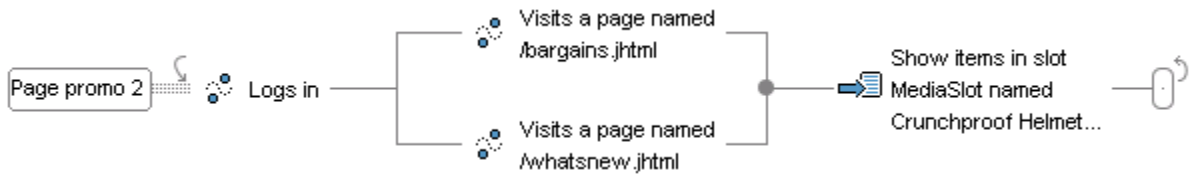
Requiring All Fork Branches to Succeed

By default, only one branch of a fork has to succeed for the scenario to progress to the next element. Take a look at the following example:



Any visitor who passes through the Logs In element enters both branches of the fork. If he or she then visits either page, the system applies the next element in the scenario. It does not wait for the person to visit the other page before continuing.

In some situations, however, you might want to restrict the system from progressing beyond the fork until the elements on every branch have occurred. In the following example, a person **must** visit both pages before the system progresses to the next element:



Note that the positioning of the Visits elements in a fork rather than in a single line means that the person can visit the pages in either order.

To force the system to wait for all elements in all branches of a fork to occur before progressing, do the following:

1. Select the whole Fork element by clicking its left side. The left side turns blue and the fork turns yellow.
2. Right-click the left side of the fork (the blue line) and select Require All Branches to Succeed from the menu that appears. Note that you cannot select this option if you have already selected Allow Only One Branch to Succeed.

The system displays a blue circle at the right side of the Fork element to show that all elements in the fork must occur.

Allowing Only One Branch to Succeed

As explained in the previous section, any visitor who enters a fork enters all branches. As soon as a visitor completes one branch in the fork, he or she progresses to the next element in the scenario (the first element after the fork). However, it is important to note that the visitor is not prevented from completing the other branches; the system keeps waiting for him or her to do so for as long as the scenario is active. Consider the example below:



A visitor logs in and enters both branches of the fork. She visits the page `bargains.jhtml`, and the system displays the specified content items in a slot on the page. Later in the same session the visitor visits the page `whatsnew.jhtml`, thus completing the second branch. The next element is triggered again, and the system displays the specified items in the slot.

If necessary you can change this behavior so that only one branch in any fork can succeed. If a visitor completes the elements in one branch, he is automatically removed from the other branches. To use this feature, do the following:

1. Select the whole Fork element by clicking its left side. The left side turns blue and the fork turns yellow.



- Right-click the left side of the fork (the blue line) and select Allow Only One Branch to Succeed from the menu that appears. Note that you cannot select this option if you have already selected Require All Branches to Succeed.

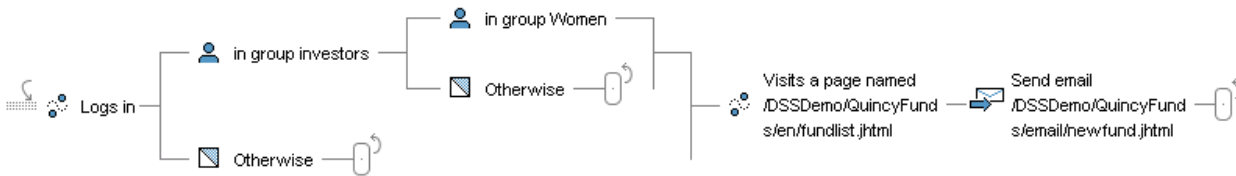
The system displays a blue circle at the beginning of each branch to show that only one branch can succeed.

Using Otherwise Elements in Scenarios

Otherwise elements are used only in forks. If you set up “if” elements for one or more branches in a fork, you can use the Otherwise element as an “else” statement to handle all visitors who do not meet the criteria of the other branches.

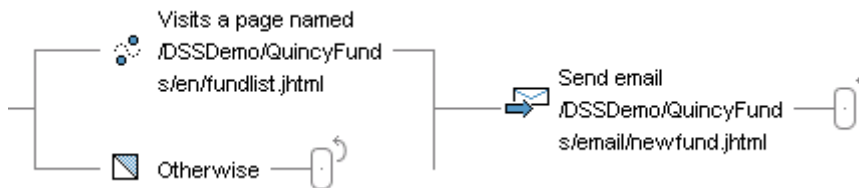
Using an Otherwise element is optional, but it is highly recommended. If you do not include this element, site visitors who do not qualify for the other branches do not proceed to the next element in the scenario. However, the system does keep waiting for them to do so, which may have a negative effect on site performance. See [Tips for Creating Efficient Scenarios](#) for more information.

The following example shows an Otherwise element:



Here, the two Otherwise elements are followed by Stop elements. The effect is as follows: people who log in but are not in the profile group Investors are removed from the scenario. People who are in the group Investors but not in the group Women are also excluded from the scenario.

Note that Otherwise elements are designed to work only in conjunction with Condition or People elements. Do not use them on the branch of a fork whose other branches start with Event elements. In the example above, you could not do the following:



This use of an Otherwise element is invalid. If site visitors reach this stage in the scenario, the system will keep waiting for them to visit the specified page for as long as the scenario is active. It will not apply the Otherwise element to them if, for example, they visit a different page or log out of the site.



Adding Custom Elements to Scenarios

If the Event, Action, or Condition elements that come with the system do not meet all your requirements, your application developers can create custom ones. Custom elements appear in the ATG Control Center and you can use them as you would use standard elements.

Note that events, actions, and conditions are the only elements you can customize. The process for adding both is explained in *Adding Custom Events, Actions, and Conditions to Scenarios* in the [ATG Programming Guide](#).

Using Slots

A slot is a Nucleus component that you can use to set up and display a series of personalized content items on one or more Web pages. (For more information on Nucleus, refer to the [ATG Programming Guide](#).) As described earlier in this guide, it is possible to create and display personalized content through content targeters; however, slots provide some powerful features not available through targeters.

- You can include slots in scenarios, giving you greater control over the circumstances in which they are displayed. For example, you can include Time elements in a scenario that change the slots after a specific period. Using scenarios, you can also set up a type of slot called an active slot that requests its own content according to criteria you specify.
- With slots, the system can more efficiently cache the items that it shows, which makes displaying them faster.
- Targeters can be used to display repository items only. Slots are often used to show repository items (such as images), but you can also use them to display any of the following:
 - Text strings
 - Dates
 - Numbers (Java types Long and Double)

The type of item that a slot displays is determined by the developer who creates the slot component. Note, however, that a single slot can display only one type of item; for example, a slot cannot contain both a repository item and a date.

Slot Basics

In this example, your site includes a Login page called `login.jsp`. You decide to put a banner containing dynamic content on the Login page.

The application developer creates the slot as a Nucleus component. He or she can do this in three ways: by writing a `.properties` file; by using the Component Editor in the ATG Control Center; or by using the Scenarios > Slots window in the ATG Control Center. This process is described in the *Using Slot Components* chapter in the [ATG Personalization Programming Guide](#).



The page designer then uses a targeting servlet bean to display the slot component, adding it to the banner area of the Login.jsp page. This process is described in the chapter *Setting Up Targeting Services* in the *ATG Personalization Programming Guide*.

After the slot has been added to the appropriate site page, you use the ATG Control Center to create a scenario that does the following:

- Defines the events that trigger the display of items in the slot.
- Includes an Add Items to Slot element that specifies the content items you want to display and the slot you want to show them in.

In this example, you set up a scenario that waits for visitors to access the Login page and then specifies three content items, X, Y, and Z, for display in a slot named ProductSlot. (Item X is perhaps an image containing a “Welcome!” message, and items Y and Z are images of two products that are currently on promotion.)



When someone triggers the scenario by visiting the Login page, the scenario fills the slot named ProductSlot with content items X, Y, and Z. The slot component then displays the items in the slot, which the page developer has already added to the Login page. The system uses various methods and settings to define the order in which to show items and the number of items that appear at once. See [How Content Is Displayed in Slots](#) for more information.

How Content is Displayed in Slots

The slot component can display the specified items in different ways depending on how the application developer configures the component. For example, the slot can show items once each or in continuous rotation. You can specify the order of display or have the slot display its items randomly. You can also limit the number of items that can appear in the slot at any one time. The sections that follow describe some of these settings. For more information on other options that you can define for slots, refer to *Using Slot Components* in the *ATG Personalization Programming Guide*.

Defining the Order of Display

By default, if you do not specify the other ordering options, the system displays items in the order in which they arrive in the slot.

When you create a scenario for a slot, you can use the **At Priority option** in the Add Items to Slot element to set an order for items from this scenario relative to items that come from other scenarios. For example, suppose you have two scenarios called Welcome and Login that contribute two items each to the same slot. You set the At Priority option to 1 for the Welcome scenario items and you set it to 2 for the Login scenario items. (1 is a lower priority value than 2 for items in slots.)

A site visitor triggers the Welcome scenario first. It adds two items, A and B, to the slot.



The visitor then triggers the Login scenario, which also adds two items, C and D, to the same slot, but with a higher priority (2).

When the visitor views the page containing the slot, the system displays items in this order: C, D, A, B.

For information on finding and setting the At Priority option, refer to [Creating a Scenario to Fill a Slot](#).

The **Ordering property** in the slot component also changes the order in which items appear. The application developer defines this property when he or she sets up the component. For more information, see *Using Slot Components* in the [ATG Personalization Programming Guide](#).

Active or Passive Slots?

One of the settings that the application developer defines when he or she creates the slot component is the event generation mode, which can be passive (the default) or active.

When a site visitor views a page containing a passive slot, the slot displays any items that contributing scenarios have currently defined for it. The slot itself does not issue a request for content items. The model for passive slots can be summed up as follows:

1. You create one or more contributing scenarios containing Add Item to Slot elements. These elements specify content items that will fill the passive slot in step 3.
2. A visitor displays a page containing the slot.
3. The slot displays the items that are currently defined for it.

Active slot components, however, can act as scenario events, which allows them to issue their own requests for items. When a site visitor views a page containing an active slot, the slot triggers a scenario that tells the system which content items to display. The model for active slots looks like this:

1. A visitor displays a page containing the active slot.
2. The slot generates a scenario event, triggering one or more Add Item to Slot elements that fill it with items for display.

This behavior means that an empty slot can fill itself with content on demand, which can have advantages for larger sites. For example, suppose you have 50 pages on which you want to display the same slot. With the passive model, you would have to specify each page as part of setting up the contributing scenario, or run the scenario for all pages in the site. With the active model, you do not have to specify pages because the slot requests its own items when any of those 50 pages is displayed.

For information on creating an active slot, see [Creating a Scenario for an Active Slot](#).

Note for developers: The *Passive* setting in the slot .properties file corresponds to the “Never” option in the Slot Wizard. The *Active* setting corresponds to the “When empty” option.

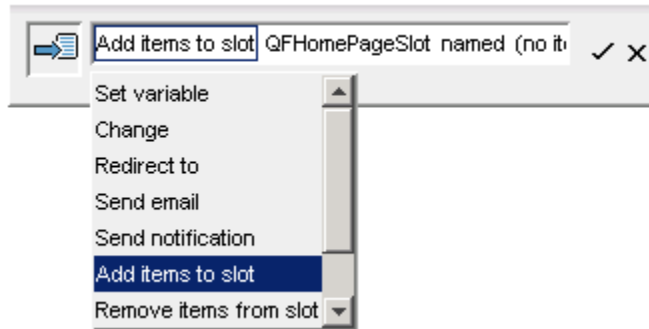
Creating a Scenario to Fill a Slot

You create a slot scenario in the same way that you create other scenarios: define the circumstances in which you want the items in the slot to appear, and create scenario elements accordingly.



In the ATG Control Center, create a scenario. (Either use the Blank template to create this scenario from scratch, or use another template that you have designed specifically for this type of scenario.)

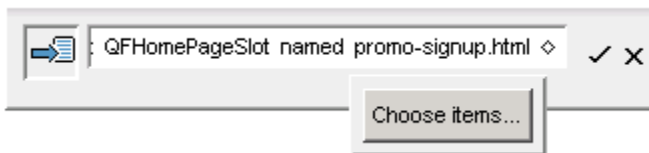
1. Add the elements that correspond to the circumstances in which you want the slot to appear.
2. Add the slot by creating an Action element and selecting Add Items to Slot as the option.



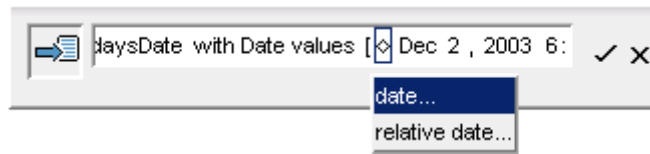
Use the second option to specify the slot to which you want to add items.



If the slot contains repository items (for example, images), a Named option appears, which you use to specify one or more repository items to add to the slot. These are the items that appear when the page is displayed.

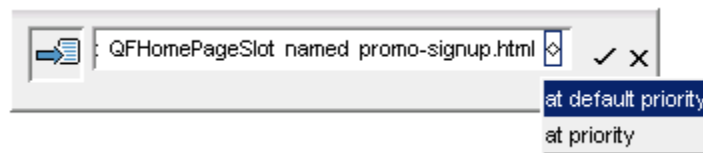


If the slot is designed to contain other types of item, for example dates, the option that appears is specific to that type. For dates, you can specify exact values (for example, May 5, 2004) or relative values (1 Week Ago). When the page is displayed, the slot shows the values you entered as exact dates.



Use the At Priority option to specify the order to show items in cases where there is more than one scenario contributing items to the slot. If you leave the priority option at the default setting (at default priority), the system shows items in the order in which the slot receives them. If you change the priority, the system shows the items in relative order. For example, items that you define as priority 2 appear before items at priority 1 from a different contributing scenario, regardless of the order in which the slot receives the items.

Note that the slot component itself also contains settings that define the order in which the items are displayed. For more information, see [Defining the Order of Display](#).



If you have difficulty displaying the At Priority options, click the check mark to add the slot element to the scenario, then select it again by double-clicking it. Then you can activate each part of the slot element in turn by pressing either the spacebar or the right arrow key. When the highlight reaches the diamond, the At Priority options appear.

3. Click the check mark to add the completed element to the scenario.



Using a Targeter to Define the Content of a Slot

In the procedure in the preceding section, step 2 shows how to specify the content items that appear in a slot. However, rather than specifying content items directly, you can include a reference to a content targeter instead. The system then uses the business rules in the targeter to define the items that appear in the slot. This feature allows you to add the more complex condition statements available through targeters to define your slot content.

Note that you can use this option only with slots that contain repository items.



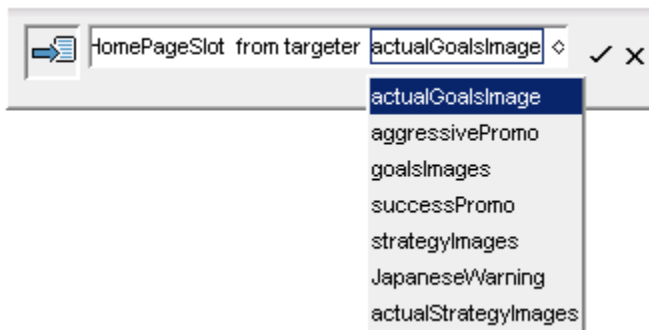
To use a targeter to define slot content, do the following:

1. Set up the targeter you want to use. For more information, see [Adding New Content Targeters](#).
2. Create the scenario for the slot as described in the previous section.
3. Select From Targeter as shown in the following image:



Note that this option is available only if the slot element is preceded by an Event element that is associated with a system request, for example Logs In or Visits.

4. Specify the targeter to use:



Specify the priority if applicable. For more information, see [Defining the Order of Display](#).

Defining Multisite Content for Slots

In some cases you may be working in a multisite ATG environment (one in which a single instance of ATG products supports more than one Web site). Typically in such an environment, all sites contain the same pages (for example, all sites contain the same login page). The page contains code that displays different content for each site. For this reason, when you set up a slot to show content, be aware that the same content may appear on all your Web sites unless the page or the slot is configured to restrict content to specific sites.

One way to restrict the content is to use site-aware targeters to fill slots. Site-aware targeters can include overrides that display different content on each site. Note that only targeters created through the ATG Business Control Center support multisite features. You cannot create site-aware targeters through the ACC. For information on creating targeters, refer to the [ATG Business Control Center User's Guide](#).



After you have created a site-aware targeter that has appropriate rules for each site, you can use it to fill a slot by following the procedure in the previous section, [Using a Targeter to Define the Content of a Slot](#). Select the site-aware targeter and then specify the site whose override rule you want to use, as shown:

```
Logs in where Site is ATG Home > Add Items to Slot Named MySlot from  
Targeter MySiteAwareTargeter > with Site Event's Site
```

In this example, the site specified in the Logs In event (ATG Home) is picked up by the Add Items to Slot action (Event's Site is ATG Home). The override rule added for ATG Home to the site-aware targeter is used to display content in the slot. The following example also works:

```
Logs in > Add Items to Slot Named MySlot from Targeter  
MySiteAwareTargeter > with Site ATG Home
```

In this example, however, content specified by the override rule for ATG Home is displayed in the slot regardless of the site where the visitor logged in.

For information on creating multisite targeters, refer to the [ATG Business Control Center User's Guide](#). For information on configuring a multisite environment, see the [ATG Multisite Administration Guide](#).

Defining a Temporary Slot from an Event Element

As an alternative to defining slots as Nucleus components, application developers can send them as properties of the JMS messages that control scenario event elements. This method provides flexibility because it allows developers to create slots on demand rather than having to register them first in Nucleus. (For more information, refer to [ATG Personalization Programming Guide](#).) These slots are, however, temporary, and they cannot be persisted across visitor sessions. In addition, you cannot use this method for slots that contain repository items; you can use it only for slots that contain text strings, dates, or the Java number types Long and Double.

To set up a slot this way, perform the following steps:

1. Add the event element that contains the slot you want to fill.
2. Immediately after the event element, insert an Add Items to Slot element. Click the word Named to display a pop-up menu, and select the option Given by Event's.
3. Use the options that appear after Given by Event's to specify the content you want to display. For example, if the content of the slot is a date value, select With Date Values and then specify the dates. See [Creating a Scenario to Fill a Slot](#) for more information.

Slots that are created as part of event elements do not appear in the Slots window in the ACC.

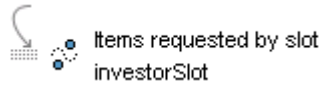
You can also use event elements to define the Remove Items from Slot element. See [Creating an Element to Remove a Slot](#) for more information on this element.

Creating a Scenario for an Active Slot

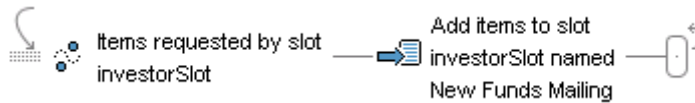
As described earlier, slot components have an event generation setting that determines whether a slot is passive (the default) or active. For more information, see [Active or Passive Slots?](#). To create a scenario that uses an active slot to request content, do the following:



1. Have an application developer create a component for the slot you want to use. Make sure that he or she specifies `active` as the event generation mode for this slot. (In the Slot Wizard, the option to choose is `When Empty`.)
2. Create a segment (see [Creating a Scenario: Basic Steps](#)).
3. Add an Event element, and select `Items Requested` from the list of events.
4. Specify the slot you want to use as the active slot.



5. Insert an `Add Items to Slot` element (an Action element). In this element, you select the same slot that you specified in step 4, and then you define the content items you want to appear.



6. Specify the priority if applicable. For more information, see [Defining the Order of Display](#).

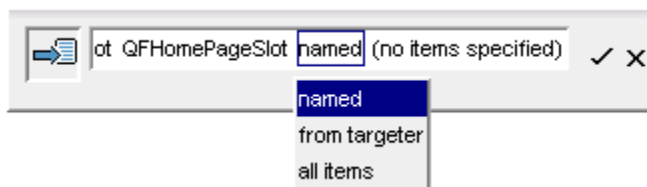
For more information on active slots, see [Active or Passive Slots?](#)

Creating an Element to Remove a Slot

You can also set up an Action element that removes specific content from a slot or clears a slot completely. This feature is most useful for slots with a rotating item retrieval mode; for destructive slots, the system removes items automatically.

To remove contents from a slot, do the following:

1. Add an Action element to a scenario and select `Remove Items from Slot` as the option.
2. Specify the slot from which you want to remove content items.
3. The next part of the element contains three options as shown:



Use the `Named` option to specify the item or items you want to remove.

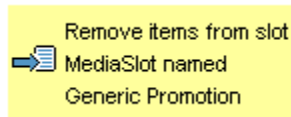


Or: Use the From Targeter option to remove content defined by a specific targeter.

Or: Use the All Items option to clear the slot completely.

4. If you chose Named, specify the item or items to remove. If you chose From Targeter, specify the targeter whose content you want to remove.

The finished element looks as follows:

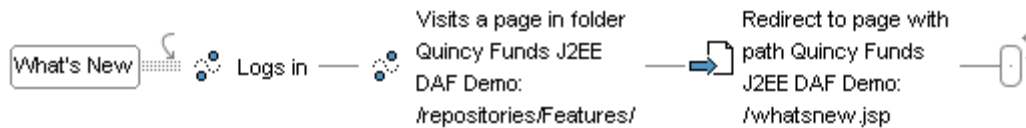


Note that you can also use a preceding event element to define the slot contents to remove; for more information, see [Defining a Temporary Slot from an Event Element](#).

Specifying the End of a Scenario

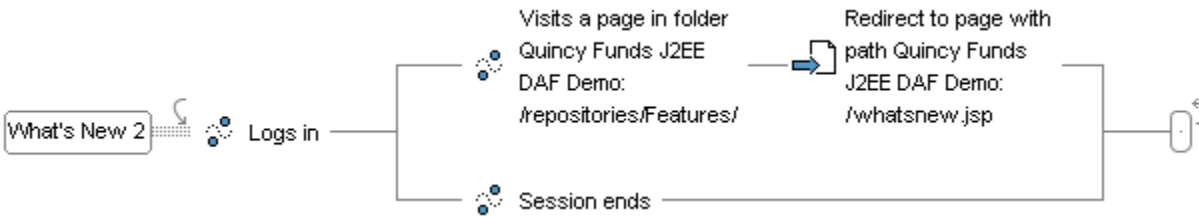
You are not required to use any specific elements to define the end of a scenario. The Scenarios module keeps track of each visitor’s progress through a scenario, and after the final element in a scenario is complete for a specific visitor, the scenario is considered to be over for him or her, unless repeat behavior is enabled for this scenario and the visitor triggers the scenario again.

However, it is important to be aware that scenarios do not stop automatically when a visitor’s site session ends. Take a look at the following example, which shows part of a possible scenario:



In this example, the system waits for a visitor to log into the site, and then waits for him or her to view a page from a specific folder. However, if a visitor logs in but does not complete the next element, and then subsequently leaves the site, the system does not stop waiting for him to view one of the given pages and will keep waiting for an infinite amount of time. This behavior does not necessarily have any adverse effects, but if your site has many visitors and you create a large number of scenarios in this way, it may cause performance to slow down. It is also probably not the behavior you wanted; you may have expected the system to exclude from the rest of the scenario any visitors who leave the site.

To avoid this problem, include an element that recognizes when a visitor leaves the site:



In this example, the system waits for the visitor to view the given page or to end his session, and then continues to the next element. Visitors whose sessions end are eliminated from the rest of the scenario.

If you want to explicitly prevent a visitor from progressing through a scenario if he or she meets given criteria, you can add a Stop element. This elements works the same way as the Stop elements in workflows. For an example, refer to [Using Stop Elements in Workflows](#).

If you want to force a scenario to end for all visitors if certain circumstances occur, you can include a Disable Scenario element. For more information, see [Using Action Elements in Scenarios](#).

Note that the list of event elements in the scenario editor does include an event called Scenario Ends, which is exposed in the editor as part of the back-end operation of the Disable Scenario action. It is fired automatically when a scenario is deleted or disabled; you do not have to add this element to a scenario to indicate that the scenario has finished. For more information on this event, refer to the [ATG Personalization Programming Guide](#).

Refer to *Designing Effective Scenarios* in the [ATG Personalization Programming Guide](#) for more information on efficient ways to both create and terminate a scenario.

Recording Scenario Activity

For the purposes of managing your company’s relationship with its site visitors, it is useful to be able to track what happens as a result of the elements within a scenario. For example, if you set up a scenario that sends a promotional e-mail to new members offering them a discount on a product, it is helpful to keep a record of the members to whom the e-mail is sent. Information such as this can help you monitor the success of your promotions, and it also allows you to provide better customer service.

You can track anything that happens in a scenario through recorder elements, which you insert at specific points in the scenario. Recorder elements collect data you can use to create reports. The Scenarios module comes with a predefined recorder element called an Audit Trail that you can use to keep a simple record of what happens in a scenario.

The Audit Trail (which is a type of Action element) works as follows: When you create a scenario, you insert an Audit Trail element after scenario elements that you think are significant and that you want to track. When a site visitor triggers that element in the scenario, the system records information that includes the following:



- A description of the activity, for example, "Sent Mountain Bike Promotional E-Mail." You specify the description yourself in the Label option of the element – see [Creating an Audit Trail](#).
- The date and time of the activity.
- The profile ID of the site visitor who triggered the element.

The system records this information in a predefined dataset called Audit Trail. The data can then be included in a report.

Creating an Audit Trail

To insert an Audit Trail element in a scenario, do the following:

1. After an element that you want to record, add an Action element, and select Record Audit Trail from the list of available elements.
2. In the With Label field, type the description of the activity as you want it to appear in the report.
3. Click the checkmark at the end of the element to add it to the scenario.

The following image shows an Audit Trail element in a scenario:



You can add as many Audit Trail elements to a scenario as you need. Make sure that each label is unique.

Enabling and Disabling Scenarios

The system does not put scenarios into effect automatically. This behavior allows you to activate scenarios only when you are ready for them to begin. At the appropriate time, do the following:

1. In the Scenario task window, right-click the name of the scenario you want to enable.
2. Select Enable Scenario from the pop-up menu.

(Alternatively, you can open the scenario for editing, and then select File > Enable Scenario.)

The system displays a red dot next to the scenario name (see the WelcomeMail scenario in the example below) to show that you have marked it as active.



Name	Folder	Author	Created	Last Modifier	Last Modified
MonthlyNewsletter	/QuincyFunds/...	admin	Tue 06/13/2000	admin	Tue 06/13/2000
WelcomeMail	/QuincyFunds/...	admin	Tue 06/13/2000	admin	Fri 08/03/2001

If the scenario contains any invalid or incomplete elements, an error message appears when you try to enable the scenario. Edit the elements as indicated, and then try enabling the scenario again.

3. Copy the appropriate scenario file to the production server for your live site.
4. Update the scenario server with the new information.

Important: The scenario is not active until you complete steps 3 and 4. For more information, see *Copying and Switching Databases* in the [ATG Installation and Configuration Guide](#).

Notes: Many scenarios contain Time elements that also affect when a scenario begins. For example, if your scenario includes an On element that tells the scenario to begin on a specific date, you can enable the scenario before that, but it will not take effect until then.

You can enable a scenario only if your copy of the ATG Control Center is connected to the scenario editor server. See *Configuring Scenarios* in the [ATG Personalization Programming Guide](#) for more information on the differences between global, individual, and scenario editor servers.

Changing an Enabled Scenario

If you have already enabled a scenario, changing it may cause the Scenarios module to lose information about any site visitors who are currently progressing through the scenario. For example, assume you have enabled a simple scenario with one segment that watches for visitors in a given profile group to log in, waits two weeks, and then sends them an e-mail reminding them to log in again. A site visitor called Jim, who belongs to the specified profile group, logs in on Monday. The next day, you decide to make some changes to the scenario. Depending on the nature of the changes you make, the Scenarios module may be unable to “move” Jim from the old version of the scenario to the new one. Its knowledge of Jim’s current position in the scenario (his scenario state) may be lost, and Jim may be removed from the scenario before he has progressed to the end.

When you make a change to an enabled scenario segment, you can check to see whether the type of changes you have made will cause the system to remove any visitors who are currently progressing through it.

1. Make your changes to the segment as required.
2. Click the first element in the segment (the name element) so that it is active.
3. Select File > Verify Changes.



If the changes you have made will cause visitors to be removed from the segment, the system displays the following message:

“Data for the current participants will be discarded if the current changes are saved.”

If the changes will not require the system to remove anyone from the segment, the following message appears instead:

“Data for the current participants will be preserved if the current changes are saved.”

In both cases, “data” here means information about the visitor’s position in the scenario. No other information or data is affected.

In general terms, changes that you make to a scenario can be classed as either “topographical” or “cosmetic.” Topographical changes are those that involve making major changes to the structure of a segment, for example by adding or removing new elements, in particular forks, branches, and “Waits” elements to the beginning or middle of a segment. (However, adding a new element to the end of a segment does not disturb the topography of a scenario and does not cause visitors to be removed from it.)

Cosmetic changes usually involve changing only the details of a specific element. For example, if a segment includes a Visits element and you change only the name of the specific page within that element, you have made a cosmetic change.

Usually, topographical changes require the system to remove visitors from scenario segments, but cosmetic changes do not.

Notes: When you use the Verify Changes option, the system does not check whether any site visitors are, in fact, currently progressing through the scenario. It simply verifies the type of changes you are planning and alerts you to their possible effect.

The system performs the same check when you attempt to save changes to an enabled segment, regardless of whether you have used the Verify Changes option. If your changes require the removal of site visitors, the system displays the following message: “Data for the current participants will be discarded and the scenario will be restarted. Proceed?”

Only information about the visitor’s scenario state is lost. If the system has already made changes to the profile database as a result of the scenario elements through which visitors have already passed, it keeps these changes. For example, assume you have a scenario segment that performs content targeting by watching for visitors to visit a given page, updating a profile property called “Confidence Index,” and then displaying appropriate content on the site’s home page. If you make a major topographical change to this segment (for example, you add a fork), the system will remove any visitors who are currently moving through this segment. However, if any visitor has progressed past the element that changes his or her profile property, the change is not lost when the visitor is removed.

The Verify Changes feature does give you some valuable information about the effects of your changes to a given scenario segment. However, it is still very important to take care when you edit an enabled scenario, and to minimize this activity whenever possible. Visitors whose scenario state is lost can progress through the scenario again if they meet the criteria that trigger the scenario’s elements. This behavior may have undesirable results; for example, if you use ATG Commerce and you have a scenario that e-mails discount coupons to site visitors who perform specific actions, you may accidentally send the



coupon twice to the same visitor. In addition, any data that you collect for reports may be distorted if you accidentally allow visitors to pass through a scenario twice.

Disabling a Scenario

To stop a scenario that is currently active, do the following:

1. In the Scenario task window, right-click the name of the scenario you want to disable.
2. Select Disable Scenario from the pop-up menu.
3. (Alternatively, you can open the scenario for editing, and then select File > Disable Scenario.)

The system displays the following message: "Disable scenario and discard data for current participants?" Note that this message does not necessarily indicate that any visitors are currently progressing through the scenario. It simply reminds you that the system will subsequently lose scenario state information for any visitors who are. For more information, see [Changing an Enabled Scenario](#).

If you click Yes, the system removes the red dot from the display to show that you have marked the scenario as disabled.

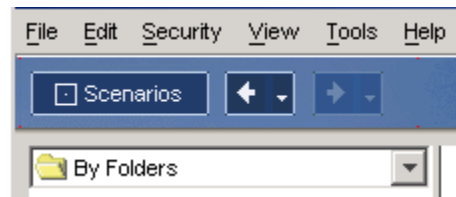
4. Copy the appropriate scenario file to the production server for your live site.
5. Update the scenario server with the new information.

Important: The scenario is not disabled until you complete steps 4 and 5. For more information, see *Copying and Switching Databases* in the [ATG Installation and Configuration Guide](#).

Organizing and Viewing Scenarios

By default, the ATG Control Center organizes and displays scenarios according to the folder in which they are located. You can change this setting, however, and display scenarios according to criteria such as a scenario's contents or creation date. This feature can be extremely useful if you have large numbers of scenarios to track and maintain. For example, suppose the page developers working on your site renamed one of its pages from `Wel come. j sp` to `2002_Wel come. j sp`. You would have to find and update every scenario that uses this page so that your campaigns would work as planned. Using this feature, you could choose to display scenarios according to the site pages they reference, and then look for any that include `Wel come. j sp`.

To change the way in which the ATG Control Center displays scenarios, use the By Folders dropdown list in the top left corner of the main scenario window.



Use the options in this list as follows:

Option	Organizes scenarios according to...
By Profile Groups	The profile groups that are referenced by the People elements within each scenario.
By Profile Properties	The profile properties that are referenced by any elements within each scenario.
By Slots	The slots that are referenced by the Add Items to Slot, Remove Items from Slot, or Items Requested by Slot elements within each scenario.
By Actions	The actions that the scenarios contain.
By Events	The events that the scenarios contain.
By Dates	Any absolute dates or ranges of absolute dates that the scenarios contain. For example, dates referred to by an On or Between time element would qualify, but a date included as a property of an event (People whose Date of Birth is January 1) would not.
By Authors	The ATG Control Center users who created the scenarios.
By Creation Dates	The dates on which the scenarios were created in the ATG Control Center.
By Last Modified	The dates on which the scenarios were last edited in the ATG Control Center.
By E-Mail Templates	The e-mail templates (JHTML or JSP files) referenced by any Send E-Mail or Send Notification elements within each scenario.
By Pages	The Web site pages referenced by any Visits or Redirect To elements within each scenario.

Note that this feature works for entire scenarios rather than for individual segments within a scenario.

Creating Templates for Scenarios

Templates are useful for scenarios that you or another business manager will create often. For example, if you regularly run the same type of promotion for your e-commerce site – you plan monthly promotions

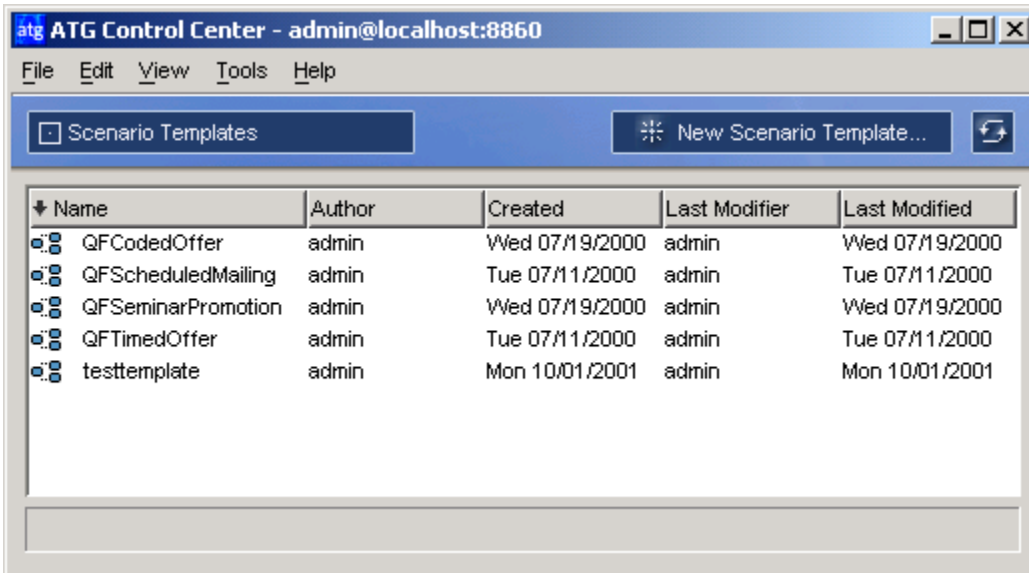


in which the start date and the products on sale change each time, but other elements such as the target group of users stay the same – you can create a template, and then use it as a quick, reliable way to carry out similar promotions at appropriate times. Another example might be a seasonal promotion that you run with very few changes every year (for example, a promotion for Mother’s Day). By creating a template for the promotional scenario, you can save time and effort because you will not have to recreate it each year. A template based on a successful, well tested scenario also helps you avoid errors.

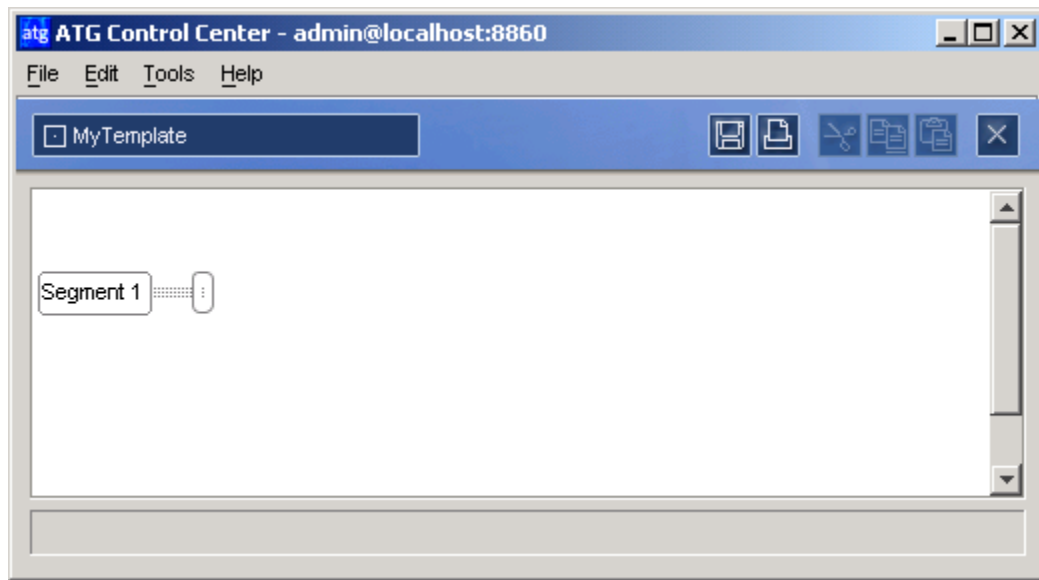
Note: The ATG system administrator uses the People and Organizations > Control Center Groups window to determine whether you have access to the Scenario Templates menu item. In addition, the administrator can control access to specific templates through the Security menu at the top of the Scenario Templates window. For more information, refer to [Security Access in Scenarios](#).

To create a template:

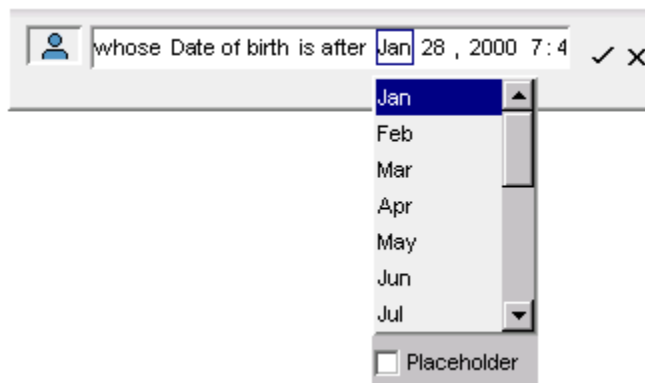
1. In the ATG Control Center, select Scenarios > Scenario Templates. The Scenario Template window appears, as shown below:



2. Select File > New Scenario Template. The New Scenario Template dialog box appears.
3. Specify a name for the new template.
4. Click OK. The system displays the first element of a new scenario segment, as follows:



5. Add the elements that you need for the template. For information on how to do this, see [Creating a Scenario: Basic Steps](#). When you add an element that you want to be a placeholder in the template, do the following:
 - Display the menu that shows the possible options for each element item. See the following example:



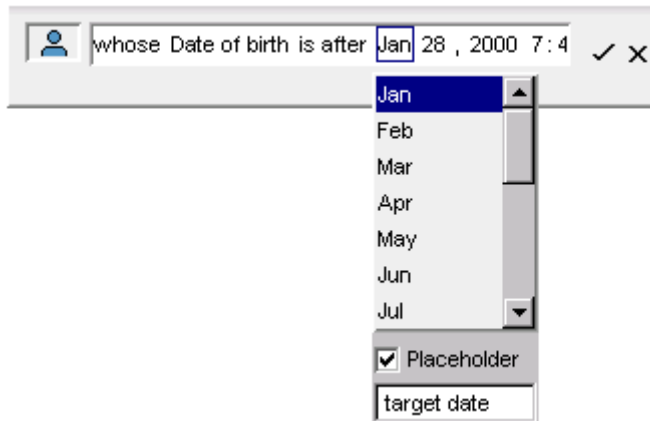
- Check the Placeholder option.

Note: If this option does not appear, the element you are editing is not one that you can use as a placeholder.

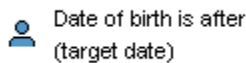
When you check the Placeholder option, the system displays a blank field underneath it. In this field, enter the text that you want people who use this template to see for this placeholder. The text appears as a field label in the Define New Scenario dialog box.



Important: Because of the nature of the Define New Scenario dialog box, users rely on the text you specify here to understand the purpose of each element in your template. For this reason, make sure you enter text that is as descriptive and clear as possible. For more information on the Define New Scenario dialog box, see [Creating a Scenario from a Template](#).

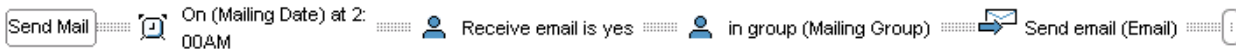


In the Scenario Template editor, placeholders appear within parentheses:



- When you have finished adding elements and placeholders, select File > Save Scenario Template. The new template is ready to use.

An example of a scenario template, the QFScheduledMailing template from the Quincy Funds demo, is shown below



Creating a Scenario from a Template

The example in [Creating a Scenario: Basic Steps](#) showed how to create a scenario from scratch. However, you can also use a template as a quick way to create a scenario.

To create a scenario from a template:

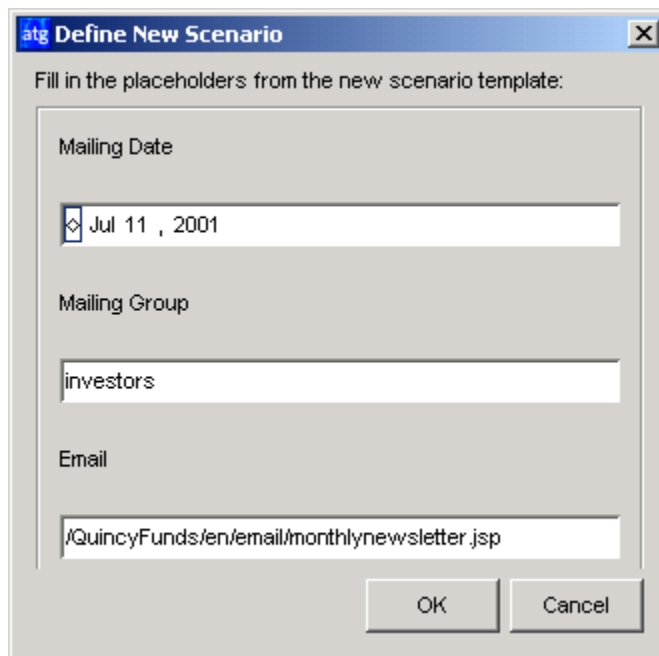
- In the ATG Control Center, select Scenarios > Scenarios.



2. Select File > New Scenario. The Use Scenario Template? dialog box appears. Click Yes and then click Next.
3. The Choose Scenario Template dialog box appears.
4. Select the template you want to use. See [Creating Templates for Scenarios](#) for more information.
5. Click Next. The Choose Scenario Name dialog box appears.
6. Specify a name for the scenario you are about to create. Also specify the folder in which you want to save it.
7. Click Finish.

The system displays the Define New Scenario dialog box, which contains fields that correspond to the elements in the template. Each field shows a placeholder value that represents an element you can change each time you use this template. Templates usually contain other elements that do not change; these do not appear here.

The dialog box that corresponds to the Quincy Funds QFScheduledMailing template looks like this:



Note: Because you see only some of the elements in the template, it can be difficult to understand what the associated scenario does by looking at this dialog box. You can overcome this problem in several ways:

- Use the Scenario Template editor to view the template and see what it does. However, you can do this only if your security access level allows you to create and edit templates.



- Ask the person who created the template to print a copy of it for you (see [Printing Scenarios](#)).
 - Alternatively, just click OK here without changing any values. The scenario appears in the Scenario Editor with all the elements set to their default values. You can then review the scenario to see what it does, and edit the elements as you would edit any other scenario.
8. Edit the fields by replacing the placeholder values with the real values that you need. To edit the fields, click each placeholder and then select the value you want from the list that appears.
 9. When you have finished editing, click OK. The completed scenario appears across the window.

Printing Scenarios

To print a scenario or a scenario template:

1. Display the scenario or scenario template in the editing window.
2. Select File > Print. A dialog box appears, prompting you to choose whether to have the system scale the scenario to fit the page or print it full size (on multiple pages if necessary). The page size and orientation are the ones you have currently selected for your printer. Select Scale to Fit Page unless the scenario is so short that you are sure it will fit on the page.
3. Click OK. A standard print dialog box appears, allowing you to print the scenario or template to the specified printer.

The system prints all segments of the scenario or template you selected.

You can also choose to save a scenario or a scenario template in JPEG format for use as an image in another application. To do so, select File > Save as JPEG and then specify a name and location for the file.

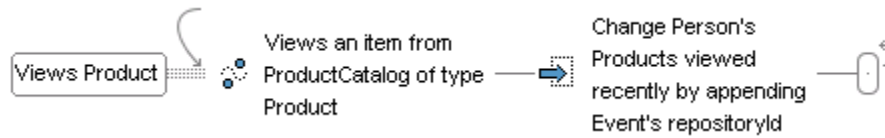
Using Scenarios to Track Visitor Behavior

The chapter [Tracking Visitor Behavior](#) describes the process of monitoring the activities of your Web site visitors and using that information to update their profiles. It explains that you perform this task in different ways depending on the components of your ATG product suite.

If you use the Scenarios module, you use scenarios to track visitor behavior and update profiles. This section includes some sample scenarios that show how to do this.

Tracking Items that a Visitor Displays: Example 1

The first example shows how a Web site tracks the items that a visitor views:

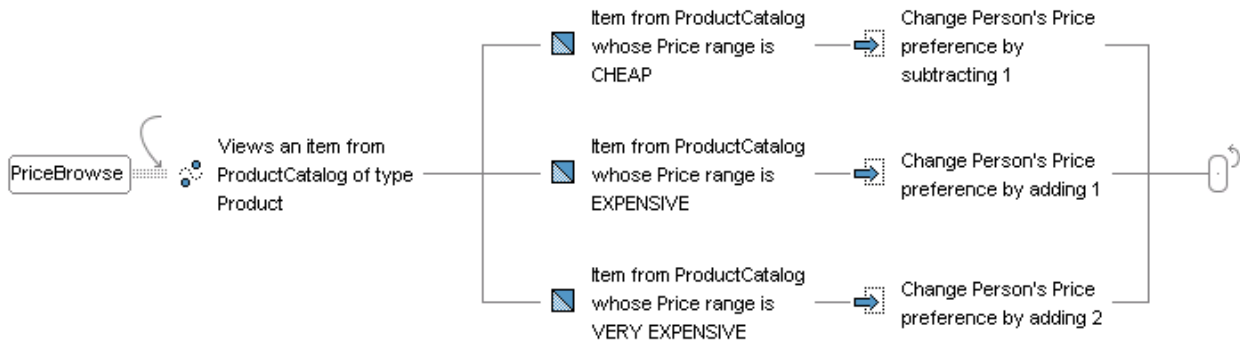


For this site, each visitor profile has a property called Products Viewed Recently that contains a list of IDs corresponding to the products that the visitor views. The scenario watches for a visitor to view any product from the catalog, and then updates his or her profile by adding the product's ID (its repository ID) to the list in the Products Viewed Recently property. It uses an Action element, Change, to update the profile.

The site's application developers can then use the new value in the property as a way to personalize content. For example, they could perform cross selling by setting up a slot that shows helmets by a given manufacturer to anyone whose Products Viewed Recently list contains one of that manufacturer's bikes.

Tracking Items that a Visitor Displays: Example 2

The second example shows how a Web site tracks the price range of items that a visitor views and then updates the profile with that information:

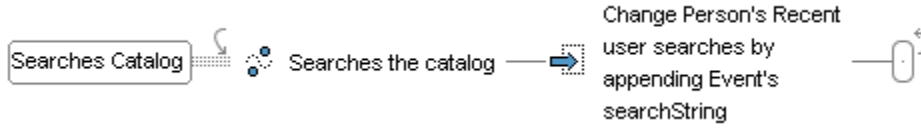


The scenario watches for a visitor to view any product from the product catalog. Each item in the catalog has a Price Range property, for example CHEAP. Each visitor's profile has a property called Price Preference, which is a positive or negative number. The scenario contains a fork with Condition elements that tell the system to monitor the Price Range property of the items that visitor displays and adjust his or her Price Preference property accordingly.

The site can then use the Price Preference property to personalize the content that each visitor sees in the future. For example, it could offer promotions specifically tailored to anyone whose Price Preference property is more than 5.

Tracking Searches

The next example shows how a Web site can monitor a visitor's catalog searches:



This segment of the scenario watches for a site visitor to enter text into a search field for the store's product catalog. For this site, each visitor profile has a property called Person's Recent User Searches that contains a list of the words that a visitor has entered in a search field. When the scenario senses that a visitor has performed a search, it adds the text to the list. Again, the site can then use this information to personalize content. For example, it could be used to set up a one-click Search feature so that visitors can keep track of and repeat recent site searches.

Note: In the examples shown above, the visitor profile contains custom properties that were added for demonstration purposes. The properties you can use to track visitor behavior depend on your site's profile repository.

Using the Scenario Values Profile Property

As explained earlier in this chapter, you can use scenario elements, specifically the Change element, to update any property in your profile repository. The profile repository, however, also contains a property called Scenario Values that your application developers can set up to store any additional information about each visitor that you gather from scenarios – perhaps information that is valuable but of only occasional importance. The property can store more than one value at a time. In this case, the values are called “keys,” and when you use the Scenario Values property in a scenario, the ATG Control Center prompts you to specify the key to change.

Example: You decide that, for a few months, you will keep track of visitors who come to your site between the hours of 2:00 AM and 5:00 AM. Your application developers set up the Scenario Values profile property so that one of its keys is `latevisitor` and the possible values for this key are `true` and `false`. You create the following scenario:



This scenario watches for people to log into the site between the specified times, and then it changes the `latevisitor` key in the Scenario Values property to `true`. You can now use this value to personalize site content in the same way that you would use any other profile property – for example, you can use it as a way to filter site visitors in another scenario or in a content targeter.

Note also that the Scenarios module includes a scenario element called Set Variable that you can use to track any type of information you want for the duration of a single scenario segment only. See [Using Action Elements in Scenarios](#) for more information.



Moving or Renaming Scenarios

Follow these steps to rename an existing scenario or move it to another folder.

1. Display the list of existing scenarios in the Scenarios window.
2. Select the scenario you want to move or rename. (To select one without opening it, click its entry in any column except the Name column.)
3. Select File > Move/Rename Scenario. (**Note:** You cannot move or rename a scenario that is currently open in the ATG Control Center. To close the scenario, navigate to it by using the arrow buttons in the toolbar, and then select File > Close.)

The Rename Scenario dialog box appears.

4. To move the scenario to a different folder, select the destination folder from the list at the top of the dialog box. To rename the scenario, type the new name (do not include spaces).
5. Click OK.

Tips for Creating Efficient Scenarios

The *Designing Effective Scenarios* chapter in the [ATG Personalization Programming Guide](#) contains important information on the best way to design scenarios so that site performance is as efficient as possible. It is highly recommended that you read this chapter before creating large numbers of scenarios for your Web site.





10 Working with Targeted E-Mail

As part of your promotional campaigns or your plans to build long-term customer relationships, you can set up and send targeted e-mails – e-mails whose content is personalized for each recipient. The following example shows an e-mail message that has personalized content, highlighted here in italics:

To: *mjones@example.com*
From: *customerservice@pioneerbikes.com*
Subject: *Order Confirmation*

Dear *Michelle Jones*,

Thank you for your order. We shipped it today to:
430 Chestnut Street
Orpington, MA 12345

May we suggest ordering these great products to complement your *Arribia cycling gloves*?

Arribia bike shorts
Springtrak insulated water bottle
Springtrak shatterproof helmet

Thank you for shopping with us!
Sincerely,
Customer Service
Pioneer Bike Store

Creating a Targeted E-Mail Message

For every type of e-mail you want to send, the page developers working on your site create a JHTML or JSP template file that contains the body of the message. They include both the standard content (the text that is the same for every recipient) and the code elements that ATG uses to generate the personalized content.

The following example shows how the corresponding JSP file might look for the e-mail message above. Again, for the purposes of illustration, the code that produces the personalized content is shown in italic type:



```

<%@ taglib uri="/dspTaglib" prefix="dsp" %>
<%@ page import="atg.servlet.*"%>
<dsp: page>

<html >

<dsp: setvalue value="customerservice@pioneerbikes.com" param="messageFrom"/>
<dsp: setvalue value="Order Confirmation" param="messageSubject"/>

<dsp: importbean bean="/atg/userprofiling/Profile"/>

<p>Dear <dsp: valueof bean="Profile.firstName"/>
<dsp: valueof bean="Profile.lastName"/>,

<p>Thank you for your order. We shipped it today to: <br>
<dsp: valueof bean="Profile.address"/><br>
<dsp: valueof bean="Profile.city"/>, <dsp: valueof bean="Profile.State"/>
<dsp: valueof bean="Profile.zipCode"/>

<p>May we suggest ordering these great products to complement your
<dsp: valueof bean="Profile.lastProductShipped"/>?

<p><dsp: droplet name="/atg/targeting/TargetingForEach">
<dsp: param bean="/targeters/crosssellTargeter" name="targeter"/>
<dsp: oparam name="output">
<dsp: valueof param="element.name"/><br>
</dsp: oparam>
</dsp: droplet>

<p>Thank you for shopping with us! <br>
Sincerely, <br>
Customer Service<br>
Pioneer Bike Store

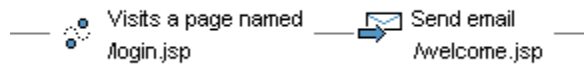
</html >

</BODY>
</HTML>

</dsp: page>

```

Note for page developers: In the e-mail template, you can include references to the message bean representing the scenario event that causes the system to send the e-mail. Consider the following example:



In the body of the welcome.jsp e-mail, you can reference the properties of the Visits Page message, for example:

```
<dsp: valueof param="message.path" />
```

This example would display the value of the message's path property, which in this case is /login.jsp. For more information on how the Scenarios module uses message beans, refer to *Using Scenario Events* in the [ATG Personalization Programming Guide](#).

How the ATG System Uses the E-Mail Template

Many of the code elements in the e-mail template (the JHTML or JSP file that contains the body of the message) refer to visitor profiles in your profile repository. For example, the JSP code `<dsp: valueof bean="Profile.firstName" />` refers to the `firstName` property of the visitor profile – in other words, to the first name that you have stored for each visitor. For each person to whom you send the message, the ATG system checks the current value in that property (in this case, “Michelle”) and inserts that value into the appropriate place in the text of the message. It performs this process for every code element in the file.

As another example, the code `<dsp: valueof param="element.name" />` refers to a set of catalog products that your application developer has included in a targeting servlet bean called `CrosssellTargeter`. When it produces the message, the system checks the targeting servlet bean and inserts the `element.name` values specified by the bean (in this case, “Arribia bike shorts,” “Springtrak insulated water bottle,” and “Springtrak shatterproof helmet”) into the appropriate place in the text of the message.

In this way, the system builds an e-mail message that is different for every recipient.

Note that the example shown above uses `setValue` parameters for the “Subject” and “From” fields in the e-mail. Using this feature means that even these fields can change according to the recipient. You could change the Subject field so that, instead of just stating “Order Confirmation,” it includes the name of the product that each recipient has ordered, for example “Order Confirmation: Arribia Cycling Gloves.” In addition, by changing the subject line, you could use one template file for different purposes, saving development time. This feature makes the e-mail template highly flexible.

For information on different methods for defining the “Subject” and “From” fields, please refer to the targeted e-mail chapter in the [ATG Personalization Programming Guide](#).



Addressing and Sending the Message

The ATG system does not use the e-mail template to determine who will receive the e-mail to which the file corresponds. Instead, it determines recipients (and addresses the message) using one of the following methods.

Using a Scenario to Address and Send a Message

You can create a scenario that includes a Send E-Mail element as well as one or more elements that define the recipients of the specified e-mail. The following example shows a simple scenario that sends a message to people in a specific profile group:



This scenario tells the system to send the message contained in the file `NewYearPromo.jsp` to all the members of the profile group “investors” on January 1, 2001. Visitors’ e-mail addresses are stored in their profiles, so the system checks the address for each person and uses it to send each message.

For detailed information on setting up scenarios, see [Creating Scenarios](#).

Using Other Methods to Address and Send a Message

As an alternative to using a scenario, your developers can use a targeting service to create a list of recipients for the message. They can base the list on specific properties in a visitor profile (for example, they can include anyone whose gender property is female), or they can base the list on profile groups (for example, they can include all members of a group called `NewMembers`). After the list is set up, developers use ATG’s TemplateEmail Sender service to send the message. For more information on both these steps, see the targeted e-mail chapter of the [ATG Personalization Programming Guide](#).

Configuring the ATG Platform to Send E-Mail Messages

Note that the application developers working on your site must configure the ATG platform so that your site can send and receive e-mail messages. For information, please refer to the *E-Mail Sender* section of the [ATG Personalization Programming Guide](#).

Setting Up a Cold Call E-Mail Campaign

As part of an initiative to increase your customer base, you might want to set up a “cold call” e-mail campaign during which you do the following:

- Send a set of promotional offers to a list of e-mail addresses.
- Keep track of the offers you have sent to each address.



- Include URLs in the e-mail that take customers to a special registration form – one that allows you to preserve the tracking information that you have previously recorded for that e-mail address.

Your application developers could set up this type of campaign in various ways. One possible approach is as follows:

1. Create profile items in the visitor profile repository for each e-mail address on the cold call list. For each profile, specify the following key properties:
 - Enter the e-mail address as the `login` property (because the user has not chosen one yet).
 - Leave the password property empty.
 - Set the `email` property to the e-mail address.

This configuration permits scenarios to send targeted e-mail messages to these addresses and to set profile properties that track the offers you have sent.

2. Send a targeted e-mail message that includes a site URL with parameters that specify both the e-mail address and any optional offer code (see the Quincy Funds demo for an example of offer code processing).
3. On the page to which the URL directs the visitor, use the e-mail address to log in the visitor (the e-mail address is also the `login` property in the visitor's profile). Use the `atg.userprofile.LoginProfileTools` service to perform the login and also to check that the profile belongs to a cold-call subject rather than to a known visitor. In addition, process the offer code if there is one.
4. Display a change-user-name-and-password form as if it were a regular registration form. This behavior enables visitors to select their own logins and passwords to replace the ones you set up as part of the cold call campaign.





11 Previewing Your Web Site

After you have set up your profile groups, content, and targeting rules, you can preview your Web site to see how it will look to different kinds of visitors under various circumstances.

You can preview the site in two ways:

- Use the **Preview with Profile toolbar button** in the People and Organizations > Profile Repository window. This method is useful if you want to preview the Web site as it looks now from the point of view of a specific visitor –someone who has an existing profile in your system. For example, if you have the Quincy Funds demo, you can use this method to preview the Quincy Funds site as a broker, Jack Smith.
- Use the **Preview window** (Targeting > Preview). Use this method if you want to preview the Web site according to a set of profile properties that do not necessarily correspond to any single profile. For example, if you want to see how a page on your site will look to female visitors who have a last activity date of December 31, 2001, use the Preview window.

This method also allows you to see how the Web site will look at a specific time and date.

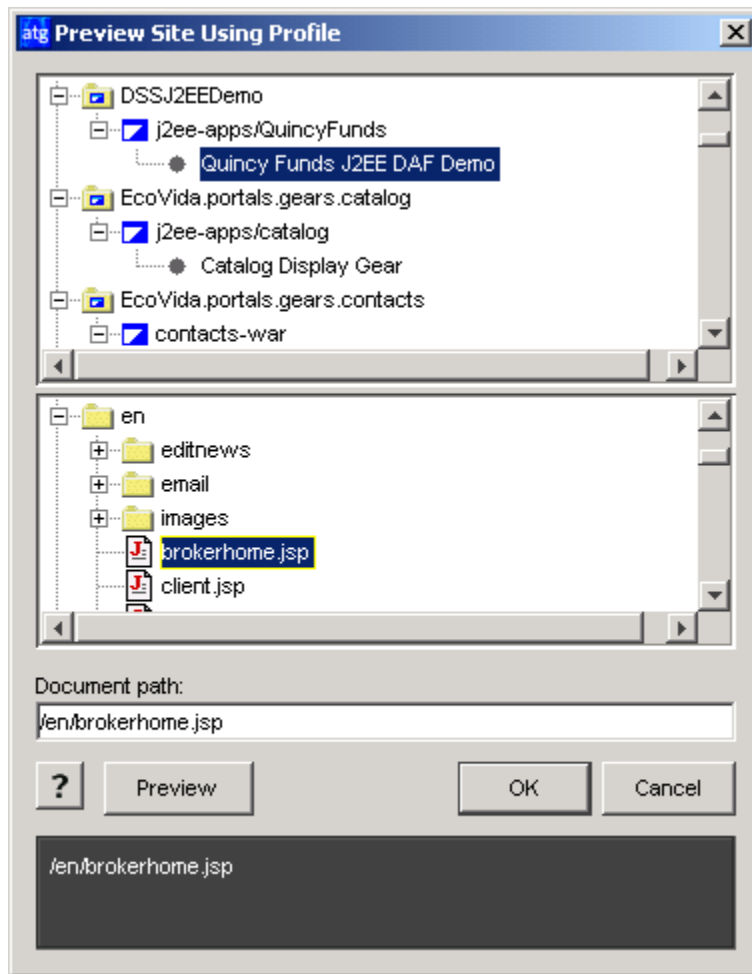
Using the Preview with Profile Toolbar Button

Follow these steps to use the Preview with Profile toolbar button to preview your Web site:

1. Select People and Organizations > Profile Repository.
2. Display the visitor profile you want to use to preview the site. For example, if you have the Quincy Funds demo, you could display the profile for broker Jack Smith.
3. Click the Preview with Profile button on the toolbar. The button has this icon:



4. The Preview Site Using Profile dialog box appears. Use it to specify the page that you want to preview. For example, you could select the brokerhome. j sp page from the Quincy Funds demo:



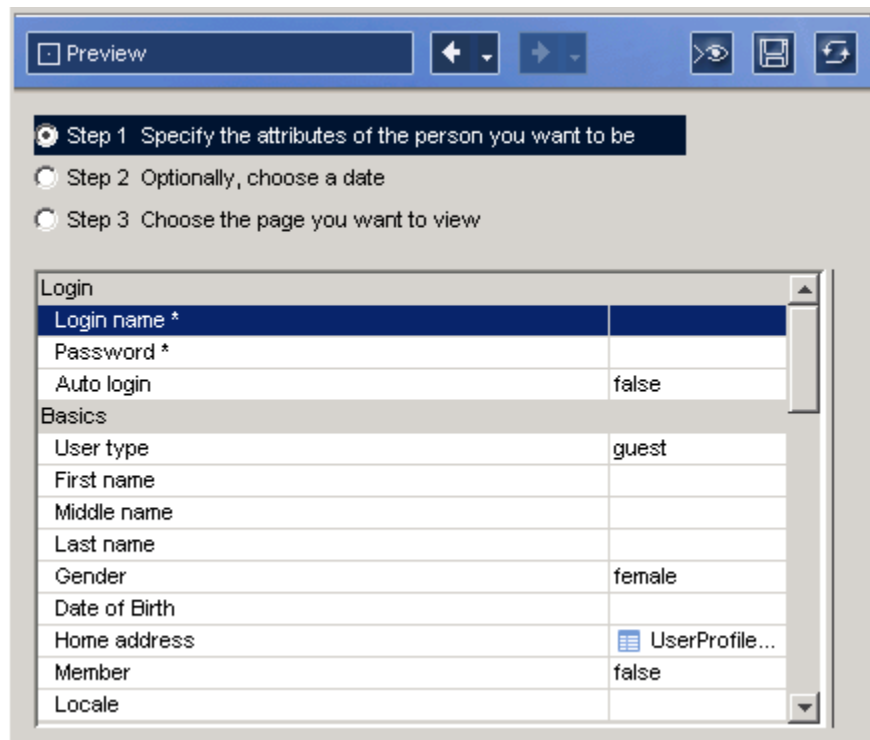
When you click OK, the system displays the specified page in your Web browser. The content of the page is personalized for the profile you selected in step 2.

Using the Preview Window

Previewing your site using this method involves three steps:

1. Specifying your visitor properties (the person you want to “be” when you look at the site).
2. Setting date and time conditions (optional).
3. Selecting the page you want to preview.

To open the Preview window, select Targeting > Preview from the main ATG Control Center window. The following window appears:



The three “step” buttons at the top of the window show how to preview your site. As you click each step, the features of the window change accordingly.

Note: The profile properties that you see depend on the profile repository you use for your Web site. For more information, see *Setting Up a Profile Repository* in the [ATG Personalization Programming Guide](#).

Specifying Your Visitor Attributes

When you preview your site, you need to specify your visitor attributes. In other words, you need to specify the person you want to “be” when you look at a particular page. You can do this by editing the property values in the ATG Control Center’s test profile.

As you preview your site, click the Refresh toolbar button to update your test profile with the latest data from the ATG server. This shows you how your profile properties change as you perform various actions on the site.

To specify your visitor attributes:

1. Click **Step 1 Specify the attributes of the person you want to be.**

A two-column table displays the profile properties and values for your hypothetical site visitor. The properties and values come from your site’s profile repository.

Tip: The table contains Login and Password properties. However, you do **not** need to specify values for these properties in order to preview a page. For example, assuming



your profile repository contains a Gender property, you can specify Male as the Gender value to preview a page as any male visitor.

2. Set the values for the properties you want to use by clicking in the appropriate Value cells. (You can adjust these values later if necessary.)

Depending on the property, you can enter values in one of the following ways:

- Type text directly into the Value cell.
- Select a value from a drop-down list.
- Click the “...” button to add, remove, or edit values in a pop-up editor window.

For more information on specifying properties, please refer to [Setting Up Visitor Profiles](#).

After you specify your visitor attributes, you can define a date and time or select the page you want to preview. (For details, see [Specifying a Date and Time](#) and [Selecting the Page You Want to Preview](#).)

Specifying a Date and Time

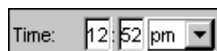
By default, you preview pages using the current date and time. However, if you have set up any date- or time-sensitive content, you can specify an appropriate date and time to check that the content will appear as planned.

Click **Step 2 Optionally, choose a date.**

1. If you want to change the date, click on the date button in the Preview window. When the pop-up calendar (shown below) opens, click on the month, year, and date you want to use, and then click OK.



2. If necessary, use the Time fields to set a new preview time:



Once you set your date and time conditions, you can select the page you want to preview. (For details, see [Selecting the Page You Want to Preview](#).)



Selecting the Page You Want to Preview

Once you specify your visitor attributes and optional date/time conditions, you can select the page you want to preview.

To choose a page for previewing:

1. Click **Step 3 Choose the page you want to view**.
2. Select the appropriate Web application from the list at the top of the window. The list of pages at the bottom of the window changes according to the application you selected.
3. Open the appropriate folder and click on the page you want to see. **Note:** To see if any new pages have been added to this application, select Refresh from the View menu.
4. Select File > Preview. The ATG Control Center opens the specified page in your Web browser, allowing you to see how the page will look to someone with your visitor attributes under the specified time conditions.

You can navigate to other site pages from your preview page. As you interact with the site, you can see how your actions affect your profile properties by clicking the Refresh toolbar button in the Preview window.

If you make any changes to your selection of profile property values or date/time conditions, and you would like to see how these changes affect the page you are previewing, select File > Apply.





12 Performing User Sampling

The user sampling features in the Scenarios module allow you to test the success of your scenarios and promotional campaigns. To use these features, you divide your site visitors into groups, treat them differently, and then monitor their behavior. Using the results, you can fine-tune your scenarios to work more effectively. Example: you devise a campaign to promote products according to the age group of the site visitor. You want to check that this strategy is successful, so you create a scenario that sets up two groups of site visitors, using age as a criterion for one but not for the other. For Group A, you display specific products to specific age groups. For Group B, you display all products regardless of the age group of the visitor. You monitor the results to see which strategy generates more sales.

You can also use these features to test the design of your Web site. For example, assume you design a new-look corporate Web site that uses a dramatically different navigation model from your old site. You are concerned that the new design makes some pages too difficult to find. You decide to compare the new site with the old one by counting the number of times your Investor Relations page is displayed during a single month. In the Scenarios module, you create a scenario that displays the old site to Group A and the new site to Group B, and then you track the number of times the page is visited during the test period.

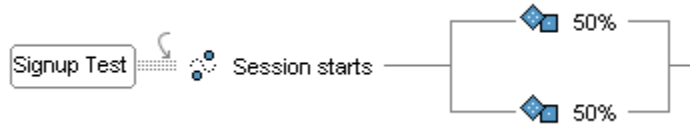
How User Sampling Works

There are two methods for performing user sampling in the Scenarios module: **short term sampling** and **long term sampling**. The first method involves dividing visitors into groups for the duration of a single test only. With the second method, long term sampling, you divide visitors into groups by first marking their profiles, and you then use those groups to perform various tests over the course of a long period.

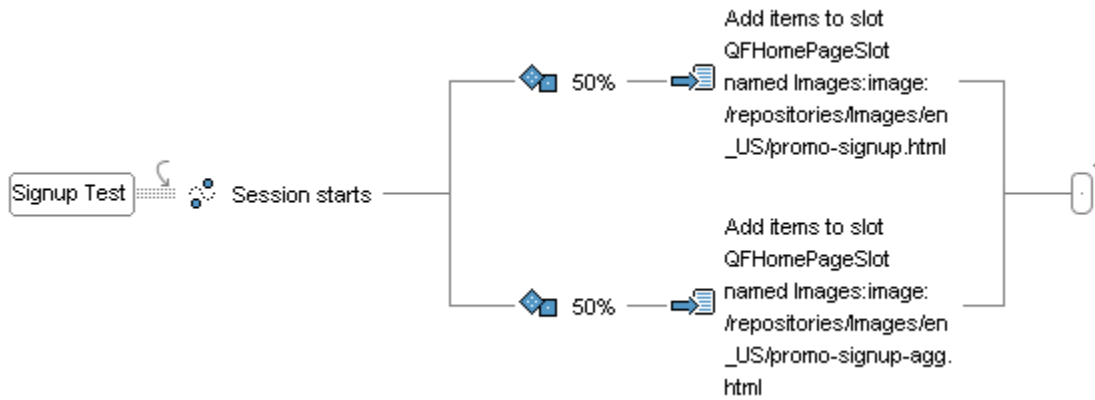
The following sections describe how to set up user sampling for both methods.

Performing Short Term User Sampling

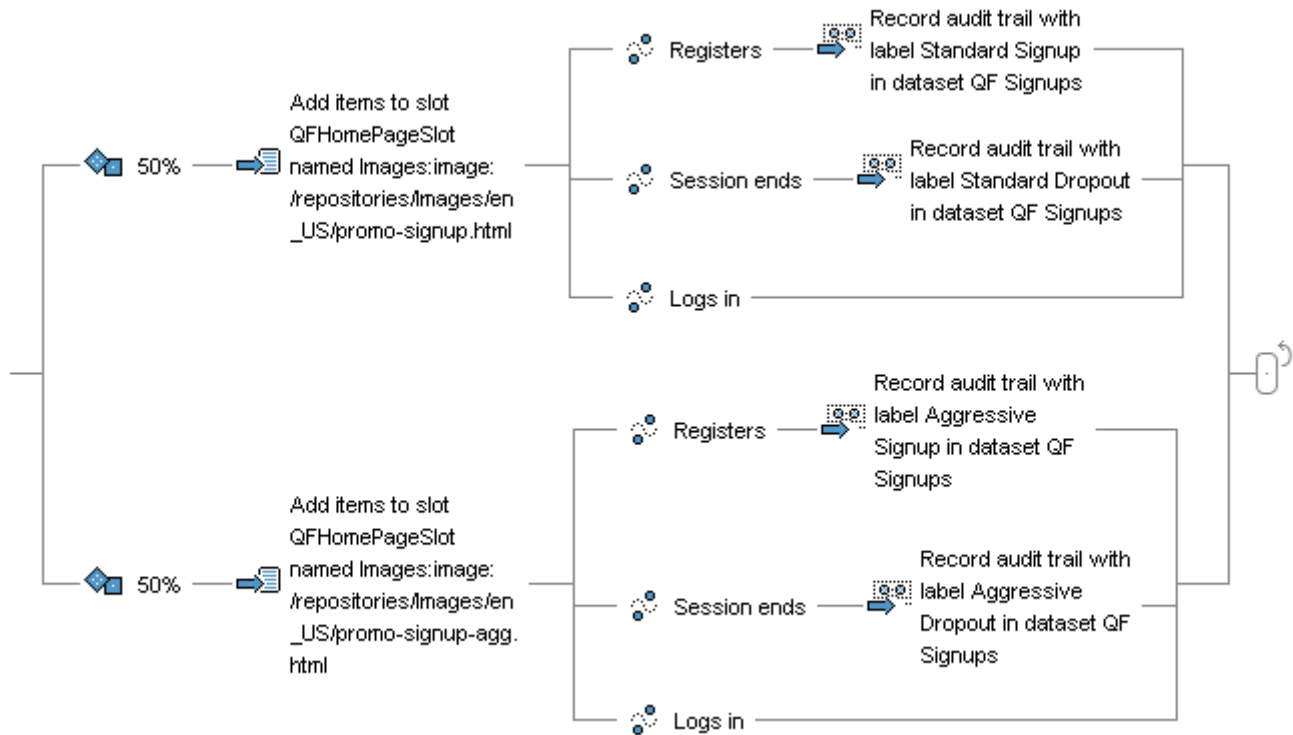
To perform short term user sampling, you create a scenario that includes an element called a Randomizing Fork. This element acts in a similar way to a regular Fork element (see [Using Fork Elements in Scenarios](#)), except that the first element in the fork always divides the group of site visitors into segments according to a percentage you specify. For example, you could choose to divide the group into two equal segments, 50% in each group. The following image shows a Randomizing Fork element triggered by a Session Starts element:



The next elements in each branch define the object of the test. In the following example, the scenario contains two Action elements that show different promotions to the two groups of visitors:



You then add recorder elements that monitor the results of the test. In this example, you want to measure the success of the two promotions you show, so you add Event elements to account for possible visitor behavior after seeing the promotions (registers to become a member, leaves the site, or logs in). Then you add recorder elements to track the parts of the behavior that interest you:



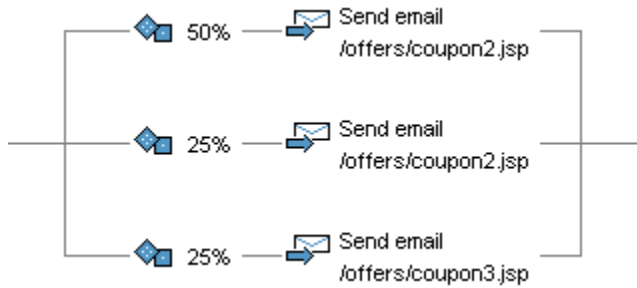
In this example, you add Audit Trail recorder elements to count the number of times that visitors respond to the two promotions either by registering or by leaving the site. The system stores this information in a dataset called QF Signups that you have created specifically for this test. (For information about Audit Trail elements, see [Creating an Audit Trail](#).)

When the test period is complete, you compare the data for the two groups of users by creating a report that displays the data that you tracked with the recorder elements.

Floating or Fixed Randomizing Forks?

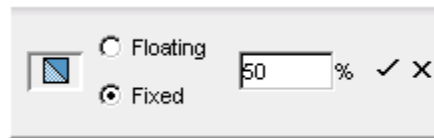
By default, the system divides the percentage of site visitors equally among the number of branches you create for the Randomizing Fork. However, you can change this behavior and specify a fixed percentage for one or more branches. For example, in a fork with three branches, you can specify a fixed percentage of 50% for the first branch. The system adjusts the percentage for the other two branches to 25% each so that the total percentage is always 100.

The following example shows a fixed Randomizing Fork:



If you specify a fixed percentage for all branches in a fork and define amounts that add up to more than 100, the system displays the value for each fork as a fraction of your new total.

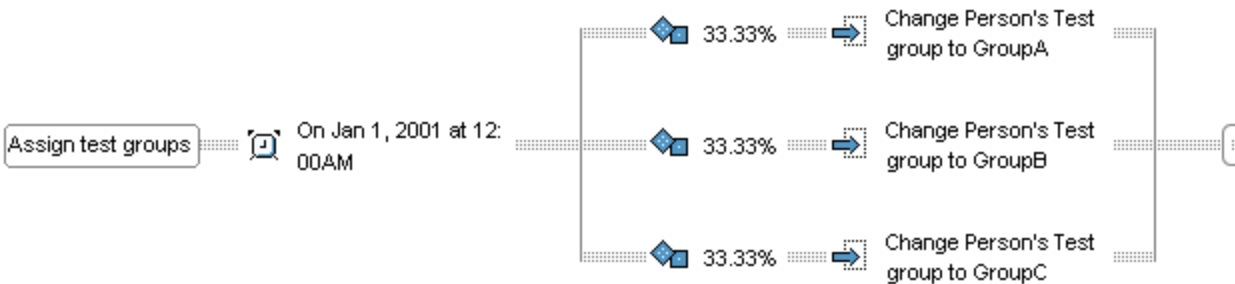
To use the fixed percentage feature, double-click on the dice icon of the element that you want to turn into a fixed percentage. Select Fixed and type the value you want to use. Then click the check mark. The following image shows the element after you double-click it:



Performing Long Term User Sampling

Long term user sampling is similar to short term sampling with one important difference: with long term sampling, the test groups you set up persist from one scenario to the next, so you can compare the behavior of different groups of visitors across many scenarios and over a long period of time.

To set up this type of sampling, you create a scenario that assigns site visitors to one of several test groups. The scenario sets the test group assignment as a property in each visitor's profile. The following image shows how the scenario might look:



On the specified date, the scenario changes a property called Test Group in each visitor's profile to either GroupA, GroupB, or GroupC. (Note that this property does not ship with the ATG platform. Your database



administrator must add a similar property to your profile repository if you want to perform long term user sampling.)

Each registered visitor now belongs to one of the three test groups. You can use these groups to test any aspect of a scenario or your Web site design that you choose, either by setting up a scenario specifically to perform user sampling, or by inserting test elements into other scenarios. In addition, because these test groups are simply profile properties set to specific values, you can use them in targeters as well as in scenarios.

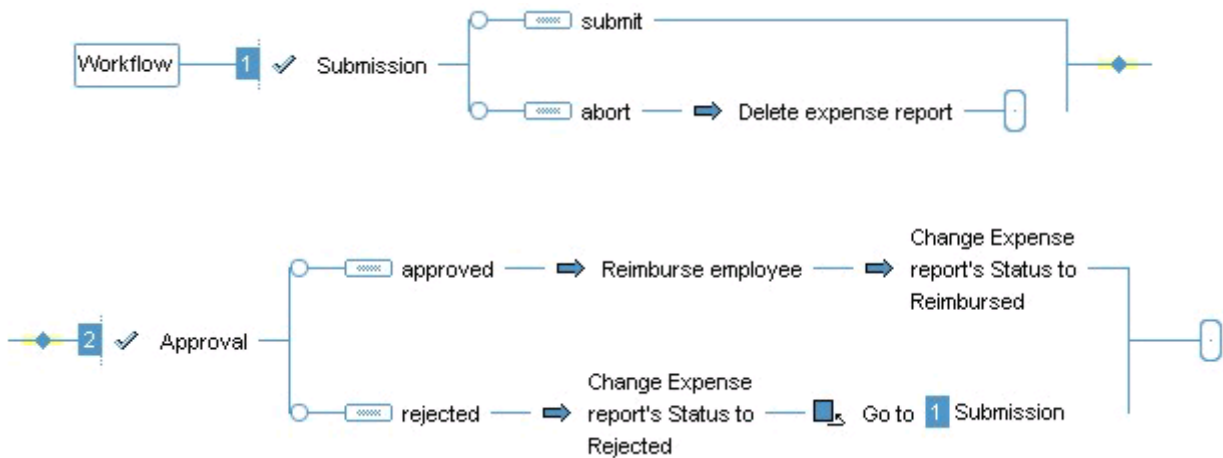




13 Using Workflows

Workflows are graphical tools that are designed to help you manage the online automation of many types of business process or activity. Like scenarios, workflows track the progress of a subject through a specific process. In the case of scenarios, the subject is a site visitor, and the process is a series of events that define some form of activity on or related to your Web site. Workflows use a similar concept, except the subject is an entity such as a customer support case or a sales inquiry, and the process is a series of events that define the lifecycle of that entity. For example, you could design a workflow in which the subject is an online expense report and the stages of its lifecycle (the elements in the workflow) are submission, approval, and reimbursement.

The following illustration shows a workflow for an expense report. (Note that the illustration is broken into two parts, but the workflow itself contains no break.)



This workflow contains two tasks: Submission and Approval. The Submission task is completed by an employee, and the Approval task is completed by a manager. If the manager approves the expense report, the Reimburse Employee custom action is triggered; this action reads relevant information, such as the employee’s identity and the amount to reimburse, from the expense report repository, and it initiates the payment. The report’s status property in the repository is then set to “Reimbursed.” If the manager rejects the expense report, the report’s status is set to “Rejected,” and the workflow reverts to the Submission task, allowing the employee to revise his or her expenses.

You design the workflow in the ATG Control Center, and a page developer sets up any relevant site pages; including any forms necessary for completion of the different stages of the workflow. In the example of the expense report, the page developer could create a site page accessible by employees that includes an



online version of a report and also contains a Submit button; and a page accessible by managers that includes a list of pending expense reports as well as Approve and Reject buttons.

The key differences between workflows and scenarios can be summarized as follows:

- The subjects that progress through scenarios are site visitors; the subjects that progress through workflows represent other entities such as documents. (The subjects of scenarios are user profiles, but the subjects of workflows can be any repository item.)
- Scenarios are used to track and respond to Web site activities such as page visit or login events. Workflows are used to track business activities that are completed either fully or partially through a Web site.
- Scenarios are frequently used on extranets and commercial Web sites; workflows are frequently used on intranets or other Web sites that support a community of users.
- The subjects progressing through a scenario have no direct interaction with it (participation in a scenario is completely transparent to the site visitor). Site users can, however, interact directly with a workflow.
- Scenarios and workflows are derived from the same base package of code (atg. process), but they use different subclasses of this code, and the sets of elements available for building scenarios and workflows in the ATG Control Center are different.

Important: You can create workflows only if your application developers have created custom workflow elements for your organization. You cannot create a workflow from a default set of elements as you can for scenarios. For more information on this restriction, see [Creating a Workflow](#).

This chapter includes information on the following topics:

[Accessing Workflow Menu Items](#)

[Security Access in Workflows](#)

[Viewing Workflows](#)

[Creating a Workflow](#)

[Using Workflow Elements](#)

[Enabling Workflows](#)

[Printing Workflows](#)

[Deleting Workflows](#)

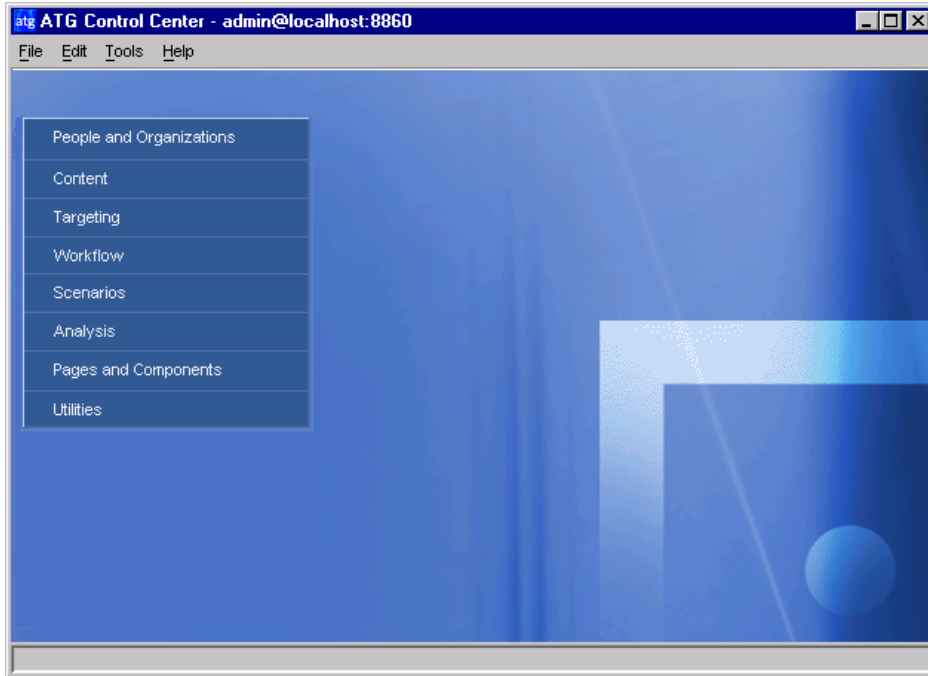
[Moving or Renaming Workflows](#)

Accessing Workflow Menu Items

If your ATG product suite contains ATG Content Administration, or if your application developers have added any custom workflow types to your system, a Workflow menu item appears in the main ATG

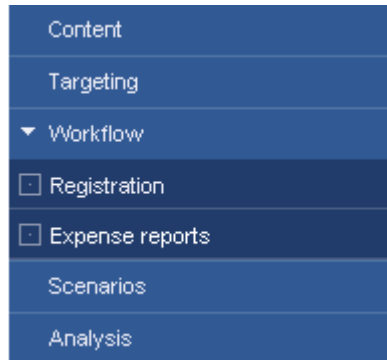


Control Center window, as shown in the following illustration (note that ATG Content Administration and Commerce items also appear in this example):



ATG Control Center window with Workflow menu item

If you expand the Workflow menu item, the types of workflow defined for your system are displayed. You can create new workflows of only the types that appear. The following illustration shows two workflow types: Registration and Expense Reports.



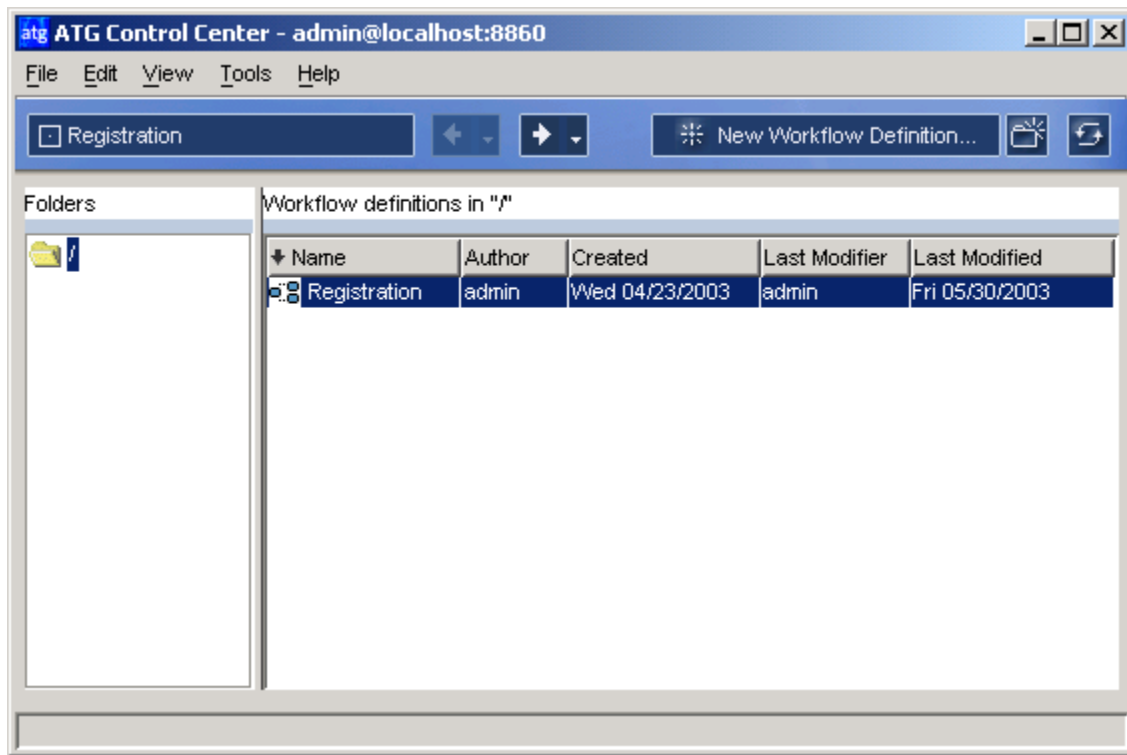
Security Access in Workflows

As described in the previous section, the Workflow menu item appears only if your ATG product suite includes ATG Content Administration or if an application developer has added at least one custom workflow type to your system.

In addition, your ability to access the Workflow item in the main ATG Control Center navigation menu is determined by the security rights that the ATG system administrator assigns to your group in the People and Organizations > Control Center Groups window. The administrator can also define an additional layer of security that controls access to individual workflows and task elements. For more information, refer to the [ATG Personalization Programming Guide](#).


Viewing Workflows

To see a list of the workflows that already exist in your system, select Workflow from the main menu and then select the type of workflow you want to view (in the example at the beginning of this chapter, either Registration or Expense Reports). The Workflow window appears as shown below:



Workflow window

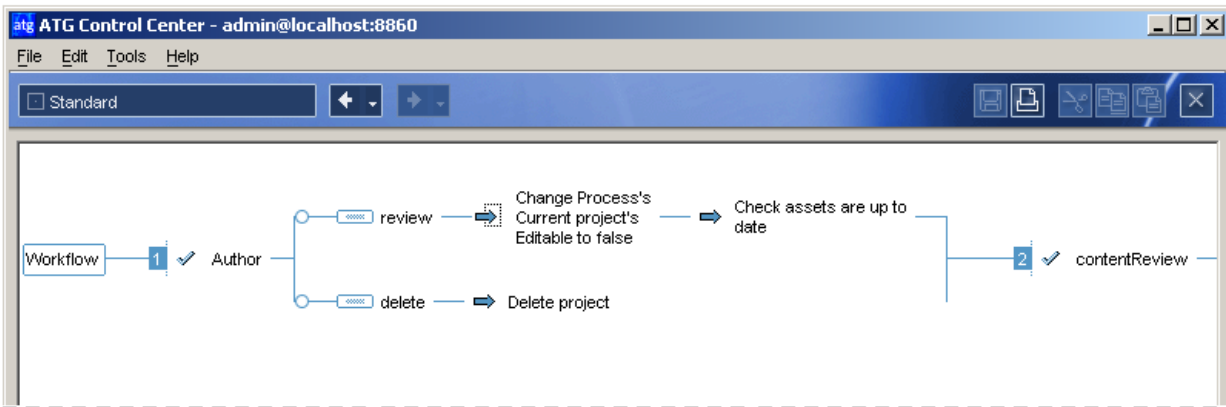
The window has the following features:

Feature	Displays...
Left panel	List of folders containing the workflows of the specified type (in the example, Registration) that have already been created for your Web site. Workflows are identified by the  icon.
Right panel	Workflows in the selected folder. You can add new workflows to this list by clicking the New Workflow Definition button on the toolbar. For more information, see Creating a Workflow .
Name column	Name of each workflow in the selected folder. The arrow next to the column title shows how workflows are sorted in this list; clicking the column title reverses the sort order.
Author column	User name of workflow creator
Created column	Date of workflow creation
Last Modifier column	ATG Control Center user name of the person who last saved changes to the workflow



Last Modified column	Date when latest changes were saved
----------------------	-------------------------------------

To edit an existing workflow, click the name of the workflow to change. The Workflow Editor window appears, as shown below, and the workflow you selected is opened for editing:



Workflow Editor

For information on editing the elements that make up a workflow, see [Using Workflow Elements](#).

Creating a Workflow

Important: You can create workflows only for the custom workflow types that the application developers have set up for your site. There are no default workflow types included in the ATG platform for ATG 10.0.2, although one is provided with ATG Content Administration. For more information on creating custom workflow types, refer to the [ATG Personalization Programming Guide](#).

Follow these steps to create a workflow:

1. Display the Workflow window as described above, selecting the type of workflow you want to create.
2. Click on the New Workflow Definition button. The New Workflow Definition window appears.
3. Select the folder where you want to store this workflow.
4. Type a name for the new workflow in the Workflow Definition Name field. It is recommended that workflow names be unique across the ATG product suite to avoid ATG Control Center errors.
5. Click OK. The new workflow opens in the Workflow Editor. For information on defining it, see the next section, [Using Workflow Elements](#).



Using Workflow Elements

Although the Registration workflow is the only type of workflow you can create by default, there are some workflow elements that are common to all workflows and will be available in any custom workflow types that your application developers create. This section describes how to use these standard elements. Note that many of them (such as fork elements) are similar or identical to the elements you use in scenarios.

The following standard elements can be used to build a workflow:

- Start
- Branch
- Task
- Outcome
- Time
- Condition
- Action
- Workflow Fork
- Fork
- Otherwise
- Go To
- Stop

These elements are described in the sections that follow.

Accessing Element Editors

Most of the elements you can use to build a workflow are configurable. To access the editor that you use to configure an element, double-click the element after you have added it to the workflow.

Using Start Elements in Workflows



When you open a new workflow in the workflow editor, it contains a Start element, which represents the event that occurs when the workflow begins to run. This element is always the first in a workflow, and it cannot be deleted. (For more information on starting a workflow, see [Enabling Workflows](#)).

Double-click this element to access a set of controls that allow you to edit the attributes of the workflow as a whole.



Control	Purpose
Default Display Name	The name that appears for this workflow on your Web site pages. You can specify a separate display name for each locale supported by your application (for example, English, French, or Japanese). If you do not specify a different display name for each locale, the default display name is used.
Default Description	The description of the workflow that displays on your Web site pages. You can specify a separate description for each locale supported by your application.
Locale for Editing Names	The locale that applies to the Display Name and the Description fields. For example, to edit the Display Name for French, select French from the list. To edit the default display names, select Unspecified from the list. Note: The contents of the locale list are determined by the <code>validLocaleNames</code> property of the Nucleus component <code>/atg/dynamo/servlet/RequestLocale</code> . For more information, see the Internationalization chapter of the ATG Programming Guide .
Form URI	The URI of a form that you can display to the site user when the workflow starts up. You can use this form to request data from the site user that the workflow may require in order to proceed.
Set Access Rights	A set of users who are permitted to run the workflow. You define the set through a standard ATG Control Center security access dialog box. For more information, refer to <i>Setting Up Security Access for Workflows</i> in the ATG Personalization Programming Guide .

Using Task Elements in Workflows



A task represents an individual step or stage in a workflow, such as Submit or Approve. A task element has a label that describes the associated activity, and it is always followed by a fork that contains at least one branch beginning with an outcome element.

When you select a task element, the initial label as well as the entire following fork becomes selected.

The editor for a task element consists of a set of controls that allow you to edit the task's attributes, including:

Control	Purpose
Task Name	The text that appears as the name for this element in the workflow.

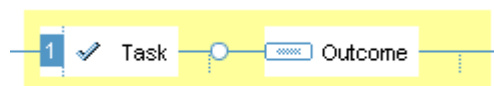


Default Display Name	The name that appears for this task on your Web site pages. You can specify a separate display name for each locale supported by your application (for example, English, French, or Japanese). If you do not specify a different display name for each locale, the default display name is used.
Default Description	The text that appears as the description of the task on your Web site pages. You can specify a separate description for each locale supported by your application.
Locale for Editing Names	The locale that applies to the Display Name and the Description fields. For example, to edit the Display Name for French, select French from the list. To edit the default display names, select Unspecified from the list. Note: The contents of the locale list are determined by the <code>validLocaleNames</code> property of the Nucleus component <code>/atg/dynamo/servlet/RequestLocale</code> . For more information, see the Internationalization chapter of the ATG Programming Guide .
Assignable	Indicates whether a user can assign the task to another user for completion. For more information, refer to <i>Setting Up Security Access for Workflows</i> in the ATG Personalization Programming Guide .
Set Access Rights	A set of users who are allowed to run the task. You define the set through a standard ATG Control Center security access dialog box. For more information, refer to <i>Setting Up Security Access for Workflows</i> in the ATG Personalization Programming Guide .

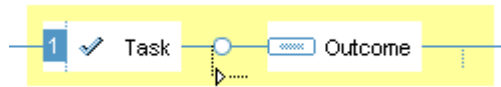
Using Outcome Elements in Workflows

Outcome elements always follow task elements, and each outcome element represents one possible result of a task. For example, an Approve task might have two outcome elements: Accept and Reject.

By default, outcome elements appear in a fork element that has only one branch, as shown in the following illustration:



To add another branch to the fork, move the mouse over the dotted line that extends from the circle at the beginning of the fork, and click the triangle that appears:



For more information on editing forks, see [Using \(Regular\) Fork Elements in a Workflow](#).

Note that time elements can appear between the task and outcome elements. See [Using Time Elements in Workflows](#).

For every outcome element, you would typically have a corresponding button on one of your site’s pages. For example, you might have an Approve or Reject button that would correspond to the possible outcome elements of the Approval task in an expense report workflow. Clicking on a workflow action button signals the completion of a task, initiates any action elements associated with the outcome element, and moves the project into the next task in the workflow.

The editor for an outcome element consists of a set of controls that allow you to edit the outcome’s attributes, including:

Control	Purpose
Outcome Name	The name for this element in the workflow.
Default Display Name	The name that appears for this outcome element on your Web site pages. You can specify a separate display name for each locale supported by your application (for example, English, French, or Japanese). If you do not specify a different display name for each locale, the default display name is used.
Default Description	The description of the outcome element on your Web site pages. You can specify a separate description for each locale supported by your application.
Locale for Editing Names	The locale that applies to the Display Name and the Description fields. For example, to edit the Display Name for French, select French from the list. To edit the default display names, select Unspecified from the list. Note: The contents of the locale list are determined by the <code>val idLocal eNames</code> property of the Nucleus component <code>/atg/dynamo/servI et/RequestLocal e</code> . For more information, see the Internationalization chapter of the ATG Programming Guide .
Form URI	The URI of a form that you can display to the site user when the outcome occurs. You can use this form to request data from the site user that you may need for the workflow to proceed.



Using Time Elements in Workflows



Workflow time elements perform the same function as time elements in a scenario: they require a specific time condition to be satisfied before the process can continue. The time conditions you can define are as follows:

Time condition	Purpose
Wait	An amount of time to wait before proceeding, for example Wait 5 Minutes.
At	At a specific time of day, for example At 8:00 AM.
Between	The beginning and end of a specific time interval, for example Between Dec 1, 2003 and Dec 31, 2003. You can specify the interval as times only, dates only, or a combination of dates and times. To change the type of interval, click the diamond that appears after the word Between when you are editing this element.
On	On a specific date, day of the week, weekday, or day of the month, for example On the 1 st Monday of the Month at 8:00 AM. To change the type, click the diamond that appears after the word On when you are editing this element.

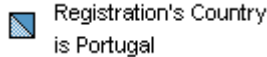
Note that time elements can appear as the first element after a task element.

For more information on working with time elements, see [Using Time Elements in Scenarios](#).

Using Condition Elements in Workflows



Workflow condition elements perform the same function as condition elements in a scenario: they require a specific condition to be met before the process can continue to the next element. However, whereas scenario conditions allow you to set a condition based only on a property of a preceding event, workflow conditions can be based on a property of the workflow type itself. For example, the Registration workflow type, for which the subjects are items in the demo Registration repository, has properties that correspond to the fields on a registration form. In this case, you could create a condition element that would test the following:



If the workflow contains custom event elements, the conditions can also be based on the properties of those events.

Another function of condition elements is to use them to compare a variable that you defined earlier in the workflow to a given value. (This type of condition element also exists in scenarios.) For more information, see the description of the Set Variable action in the next section.

Using Action Elements in Workflows



While task elements represent the steps that users perform as part of the workflow process, action elements represent the steps that you want the workflow engine to perform, usually in response to the preceding element in the workflow. For example, you could add an action element that sends an e-mail to an employee who submitted an expense report, notifying him or her that the report has been approved.

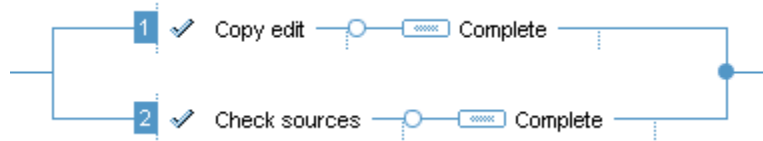
Action	Purpose
Change	Change a specified property in the workflow. Example: Change Registration's Request Status to rejected Also use this element to change any variables that you set earlier in the workflow by means of the Set Variable action.
Record Audit Trail	Track data that monitors scenario or workflow activities. See Recording Scenario Activity for more information.
Record Event	Track data for inclusion in reports, to track the result of the preceding workflow element and store information about it in a specified dataset.
Send Notification	Send a specified e-mail message to a given recipient or group of recipients. You can define the recipients as users (people with user profiles in the Profile repository) or e-mail addresses. This action is the same as the Send Notification scenario action; for more information, see Send Notification in the scenarios chapter of this guide.
Send Task Notification	Send an e-mail to the owner of a specific task in the workflow. For example, you can set the action to inform the owner of the next task in the workflow that the task is ready to be performed. Example: Send Task Notification: /notifyaccepted.jsp to owner of task Submit.



Fork elements let you split a workflow into two or more branches, each branch representing a possible path that the workflow can follow. There are two types of fork element you can add to workflows: workflow fork elements and regular fork elements.

Using Workflow Fork Elements

All the branches in a workflow fork element must be completed before the workflow can proceed to the next element after the fork. For that reason, a workflow fork is appropriate for situations where two or more tasks can be active at the same time and can be completed independently; as long as all tasks are completed, the order in which they occur is not important.

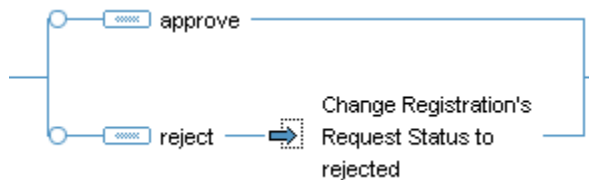


A solid circle at the end of the workflow fork differentiates it from a regular fork. (Regular forks have no circle at the end.)

Note: You can change a regular fork into a workflow fork by right-clicking it and selecting Require All Branches to Succeed from the drop-down menu. You can also use this technique to add the functionality of a workflow fork to the fork elements that you include in scenarios.

Using (Regular) Fork Elements in a Workflow

Regular fork elements (in other words, non-workflow fork elements) are the same as the fork elements you use in scenarios. They allow you to divide a workflow into separate branches that represent parallel "if" conditions. For example, you could create a fork with two branches, each containing different condition elements. The workflow could proceed along both branches, either branch, or neither branch, depending on the success or failure of the condition element. Unlike workflow forks, regular forks allow the workflow to proceed if only one branch is completed.



Note: You can change a regular fork into a workflow fork by right-clicking on it and selecting Require All Branches to Succeed from the drop-down menu.

For more information on using regular fork elements, see [Using Fork Elements in Scenarios](#).



Add Branch

By default, forks and workflow forks have two branches. If you want to insert additional branches into either type of element, select the Add Branch menu option. For more information, see [Using Fork Elements in Scenarios](#).

Using Otherwise Elements in Workflows

An Otherwise element is a special type of condition element that can appear at the beginning of one branch of a fork. It allows you to define how the workflow should proceed if none of the other branches is completed. For examples and more detail, refer to [Using Otherwise Elements in Scenarios](#).

Using Go To Elements in Workflows



Go To elements allow the workflow to jump directly to a specified task element. A Go To element can transfer execution only to a task element that is on its own branch or on any ancestor branches of a nested fork. It cannot transfer execution to an element in another branch on the same fork, or to a branch that follows it.

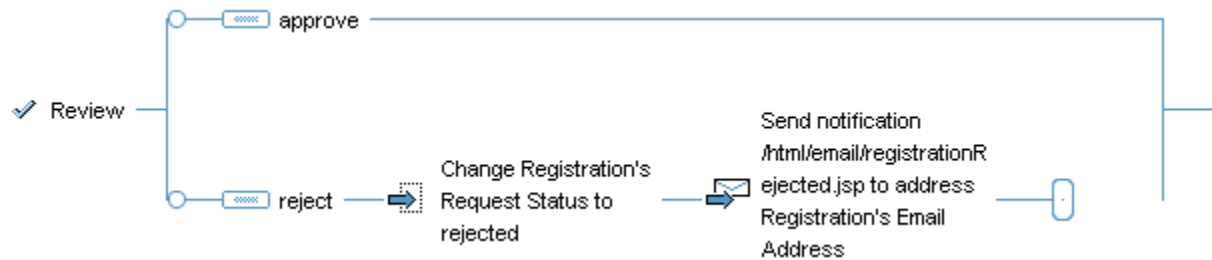
Double-clicking the Go To element displays an editor that allows you to specify the task element to which you want the workflow to jump. Only valid destinations appear as choices.

Using Stop Elements in Workflows



A Stop element represents the end of a workflow. When this element is reached, the workflow stops running. This element cannot be deleted, and it is always the last in a workflow.

As shown in the example below, you can also add a Stop element to the branch of a fork in cases where you do not want the workflow to proceed after that branch is followed:



In this case, if the registration request is rejected, the Reject branch is followed and the workflow stops executing after all the elements on the Reject branch are completed. If the registration request is approved, the workflow follows the Approve branch and continues to the next task after the fork.

Enabling Workflows

Unlike scenarios, workflows do not have to be enabled or disabled within the ATG Control Center in order to make them active or inactive. As long as the Web application that uses them is running, workflows are started whenever an event occurs that represents the beginning of a workflow (for example, an employee clicks the Submit button for his or her expense report). This behavior is in contrast to the startup behavior of scenarios. When you start the Scenarios module, all enabled scenarios are started and begin waiting for their specified events to occur.

Note for developers: The event that represents the beginning of a workflow must trigger the workflow by calling the `StartWorkflow` method of the `WorkflowView` object associated with this event. See the Javadoc for `atg.workflow.WorkflowView` in the [ATG API Reference](#).

Printing Workflows

To print a workflow:

1. Display the workflow in the editing window.
2. Select File > Print. A dialog box appears, prompting you to choose whether to have the system scale the workflow to fit the page or print it full size (on multiple pages if necessary). The page size and orientation are the ones you have currently selected for your printer. Select Scale to Fit Page unless the workflow is so short that you are sure it will fit on the page.
3. Click OK. A standard print dialog box appears, allowing you to print the workflow to the specified printer.

You can also choose to save the workflow in JPEG format for use as an image in another application. To do so, select File > Save as JPEG and then specify a name and location for the file.



Deleting Workflows

If you delete a workflow, remember to edit as appropriate any site pages that include forms or other items that refer to the workflow.

Follow these steps to delete an existing workflow.

1. Display the list of existing workflows in the Workflow window.
2. Select the workflow you want to delete.
3. Select File > Delete Workflow Definition.

Moving or Renaming Workflows

Important: If you rename a workflow, you may have to update references you've made to it on your site pages depending on the means your pages use to identify a workflow. If your pages use the workflow name shown in the ATG Control Center, and you do not update them, errors will occur whenever the workflow is invoked on the Web site.

Follow these steps to rename an existing workflow or move it to another folder.

1. Display the list of existing workflows in the Workflow window.
2. Select the workflow you want to move or rename. (To select a workflow without opening it, click its entry in any column except the Name column.)
3. Select File > Move/Rename Workflow Definition. (**Note:** You cannot move or rename a workflow that is currently open in the ATG Control Center. To close the workflow, navigate to it by using the arrow buttons in the toolbar, and then select File > Close.)

The Rename Workflow Definition dialog box appears.

4. To move the workflow to a different folder, select the destination folder from the list at the top of the dialog box. To rename the workflow, type the new name (do not include spaces).
5. Click OK.





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