



BEA WebLogic Personalization Server MyBuyBeans Tour

BEA WebLogic Personalization Server 2.0
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BEA WebLogic Personalization Server MyBuyBeans Tour

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About This Document

This document provides a tour of the The MyBuyBeans demo, which is included with the WebLogic Personalization Server as a demo.

This document covers the following topics:

- An overview of the MyBuyBeans tour. See “Overview of the MyBuyBeans Tour” on page 1-1.
- Adding properties to the appropriate property set with the Property Set Management tools. See “Working with Properties” on page 2-1
- Setting the BeaniePoint property value higher for one user with the User Management Administration tools. See “Working with User Profiles” on page 3-1.
- Adding hints generated content for infrequent and frequent customers into the content management system. See “Working with Content” on page 4-1 and “Working with Rules” on page 5-1.
- Creating the rules necessary to classify users as frequent or infrequent. See “Working with Content” on page 4-1
- Building the JSP page. See “Creating the JSP Page” on page 6-1.
- Building the portlet to access the personalized content. See “Editing the MyBuyBeans Portal” on page 7-1.
- Adding the portlet to the portal. See “Editing the MyBuyBeans Portal” on page 7-1.
- Deploying the MyBuyBeans portal. See “Deploying the New MyBuyBeans” on page 8-1.

What You Need to Know

This document is intended for business analysts, Web developers, and Web site administrators involved in setting up an eCommerce site using BEA WebLogic Personalization Server. It assumes a familiarity with the WebLogic Personalization Server platform and related Web technologies as described below. The topics in this document are organized primarily around development goals and the tasks needed to accomplish them. Generally, a set of topics also speaks to a particular development role and requires the basic knowledge with regard to the technology focus of that role:

- *Java Server Page (JSP) developer* creates JSPs using the tags provided or by creating custom tags as needed.
- *Application assembler, system analyst, or systems integrator* writes rules, writes, schemas, and monitors usage.
- *System administrator* installs, configures, deploys, and monitors the Web application server
- *Java developer* extends or modifies the Enterprise Java Bean (EJB) components that make up the Commerce Server engine, if that level of customization is needed.

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A PDF version of this document is available on the WebLogic Personalization Server documentation Home page on the e-docs Web site (and also on the documentation CD). You can open the PDF in Adobe Acrobat Reader and print the entire document (or a portion of it) in book format. To access the PDFs, open the WebLogic Personalization Server documentation Home page, click the PDF files button and select the document you want to print.

If you do not have the Adobe Acrobat Reader, you can get it for free from the Adobe Web site at <http://www.adobe.com/>.

Contact Us!

Your feedback on the BEA WebLogic Personalization Server documentation is important to us. Send us e-mail at docsupport@beasys.com if you have questions or comments. Your comments will be reviewed directly by the BEA professionals who create and update the WebLogic Personalization Server documentation.

In your e-mail message, please indicate that you are using the documentation for the BEA WebLogic Personalization Server 5.0 release.

If you have any questions about this version of BEA WebLogic Personalization Server, or if you have problems installing and running BEA WebLogic Personalization Server, contact BEA Customer Support through BEA WebSupport at www.beasys.com. You can also contact Customer Support by using the contact information provided on the Customer Support Card, which is included in the product package.

When contacting Customer Support, be prepared to provide the following information:

- Your name, e-mail address, phone number, and fax number
- Your company name and company address

- Your machine type and authorization codes
- The name and version of the product you are using
- A description of the problem and the content of pertinent error messages

Documentation Conventions

The following documentation conventions are used throughout this document.

| Convention | Item |
|--------------------------------|--|
| boldface text | Indicates terms defined in the glossary. |
| Ctrl+Tab | Indicates that you must press two or more keys simultaneously. |
| <i>italics</i> | Indicates emphasis or book titles. |
| monospace text | Indicates code samples, commands and their options, data structures and their members, data types, directories, and file names and their extensions. Monospace text also indicates text that you must enter from the keyboard. <i>Examples:</i> #include <iostream.h> void main () the pointer psz chmod u+w * \tux\data\ap .doc tux.doc BITMAP float |
| monospace boldface text | Identifies significant words in code. <i>Example:</i> void commit () |
| <i>monospace italic text</i> | Identifies variables in code. <i>Example:</i> String <i>expr</i> |

| Convention | Item |
|-------------------|---|
| UPPERCASE TEXT | Indicates device names, environment variables, and logical operators. <i>Examples:</i> LPT1 SIGNON OR |
| { } | Indicates a set of choices in a syntax line. The braces themselves should never be typed. |
| [] | Indicates optional items in a syntax line. The brackets themselves should never be typed. <i>Example:</i> buildobjclient [-v] [-o name] [-f file-list]... [-l file-list]... |
| | Separates mutually exclusive choices in a syntax line. The symbol itself should never be typed. |
| ... | Indicates one of the following in a command line: <ul style="list-style-type: none"> ■ That an argument can be repeated several times in a command line ■ That the statement omits additional optional arguments ■ That you can enter additional parameters, values, or other information The ellipsis itself should never be typed. <i>Example:</i> buildobjclient [-v] [-o name] [-f file-list]... [-l file-list]... |
| . | Indicates the omission of items from a code example or from a syntax line. The vertical ellipsis itself should never be typed. |



1 Overview of the MyBuyBeans Tour

The MyBuyBeans tour covers the following areas:

1. Adding properties to the appropriate property set in the Property Set Management tools. In this case, we add one property, `BeaniePoints`.
2. Setting the `BeaniePoint` property value higher for one user, through the User Management Administration tools. Other `BeaniePoint` property values increment as the user logs in.
3. Examining how the reference implementation Document Management System (DMS) indexes content.
4. Creating the rules necessary to classify users as frequent or infrequent shoppers and selects content accordingly.
5. Building the portlet to display the personalized content.
6. Adding the portlet to the MyBuyBeans portal.
7. Viewing the new portal using different users to see personalization in action.

This tour walks you through the steps required to use the personalization services provided by the server. In this scenario, we add to the MyBuyBeans application to track a customer's Beanie Points. Beanie points are incentives provided to customers. In this case, we use Beanie Points to track how frequently a customer visits the MyBuyBeans application. Every time a user logs in, we add five Beanie Points to the

1 *Overview of the MyBuyBeans Tour*

total. At run time, we provide personalized information, based on the frequency of customer visits. We provide frequent shoppers with special messages. Infrequent customers receive hints on using the site.

Notes: In this scenario, the MyBuyBeans property set has already been created for you.

For the purpose of this tour, we assume you are using the Cloudscape database. If you have ported your data to Oracle, do *not* add users through Personalization Server's administration tools; rather, add users through the MyBuyBeans user registration page.

2 Working with Properties

The following topics are covered here:

Adding Properties within a Property Set

Creating a property within the MyBuyBeansApp property set

Adding a beanie point default value to the MyBuyBeans property set

Adding Properties within a Property Set

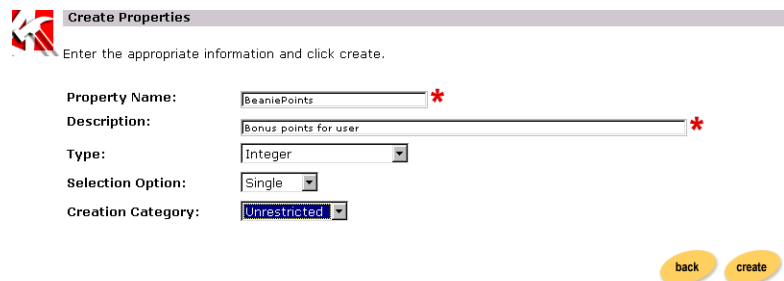
This chapter describes how to add a property to a property set by creating a property and by adding a default value.

Creating a property within the MyBuyBeansApp property set

In this section, we add a property to the existing MyBuyBeansApp property set, used to track customer bonus points.

1. Open the WLPS Administration Tools Home page by pointing your browser to `http://<wlhost>:<port>/wlpsadmin`. Enter `system` as the username and `weblogic` as the password.

- Note:** The default port is 7601. Refer to the configuration section of the installation guide for more information about setting the `ListenPort` in the `weblogic.properties` file.
2. On the Administration Tools Home Page, click the Property Set Management icon. The Property Set Management Home Page appears.
- Note:** Remember that the pages will most likely take longer to load because this is the first time they've been accessed and the system has to compile the page source code. You can see this process in the output displayed in the console. Once a page is compiled, it loads much faster when you access it.
3. From the Property Set list, select the `MyBuyBeansApp` link. The Property Set view page appears.
 4. Click **create** on the Properties bar. The Create Properties page appears.



Create Properties

Enter the appropriate information and click create.

Property Name: *

Description: *

Type:

Selection Option:

Creation Category:

[back](#) [create](#)

5. Enter `BeaniePoints` in the Property Name field.
 6. Enter `Bonus points for user` in the Description field.
 7. Select `Integer` from the Type drop-down list box.
 8. Select `Single` from the Selection Option drop-down list box.
- Note:** The single option refers to those properties having only one option (e.g., Property: Color, Attribute: red). The multiple option refers to those properties having multiple options (e.g., Property: Color, Attributes: red, green, blue, etc.).
9. Select `Unrestricted` from the Creation Category drop-down list box.

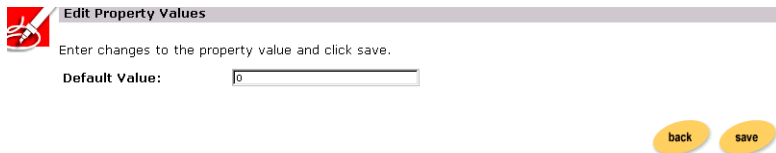
Note: Restricted categories refer to user input via a list, radio buttons, check boxes, etc. Unrestricted categories refer instances in which users populate a form field.

10. Click **create**. A message confirms that the operation was successful.
11. Click back to return to the Property Set view page. The BeaniePoints property is displayed under the Properties section.

Adding a beanie point default value to the MyBuyBeans property set

Now we'll add a default value so the application will always find a value.

1. Click **edit** on the BeaniePoints property bar. The BeaniePoints Property view page appears.
2. Click **edit** on the Property Values bar.
3. Enter 0 in the Default Values field and click **save**. The BeaniePoints Property view page appears and displays the default value.



Edit Property Values

Enter changes to the property value and click save.

Default Value:

back save

4. Click **back** to return to the Property Set view page.
5. Click **finished** to save the MyBuyBeansApp property set with the new BeaniePoints property. The Property Sets view page appears.
6. Click **home** on the BEA WebLogic Personalization Server banner to return to the Administration Tools Home Page.

3 Working with User Profiles

The following topics are covered here:

Editing user properties

Editing user properties

In this section, we set a particular user's Beanie Points value higher so we can see that the rules we create are operational.

1. On the Administration Tools Home Page, click the User Management icon. The User Management home page appears.
2. On the User Management home page, click **Users** in the Users banner. The Search for a User tool appears.

To locate the appropriate user by name:

- a. Enter `0001` in the User Name field. The search returns the user named `0001` and displays a link to the user on the page.

3 Working with User Profiles

b. Click **search**. The search results appear at the bottom of the page.

or

To see a list of all users within an alphabetized category:

- Click the appropriate letter corresponding to the first letter of the username.

Note: Use the wildcard feature by entering a partial user name immediately followed by an asterisk (*).

3. Click `0001`. The User Property view appears.

4. Select the MyBuyBeansApp property set to view for `0001` from the drop-down list box and click **search**. The page refreshes and shows the user's values for the properties in the MyBuyBeansApp property set.

The screenshot shows a web interface for user management. At the top, a green header bar contains the text "Users: demo" on the left and "finished" on the right. Below the header, there is a section titled "Select a property set to view for this user :". This section includes a dropdown menu with "MyBuyBeansApp" selected and a green "search" button. Below this is a "User Information" section with "Username: demo" and a red "edit" button. The main part of the page is titled "Properties" and shows a table with one row: "BeaniePoints (Integer, Single, Unrestricted)" with a value of "0". A black "edit" button is located to the right of this row.

5. Click **edit** on the BeaniePoints Properties bar. The Edit Property Values page appears.

6. Enter 20 in the New Value field and click **save**. The page refreshes and confirms that the property was set correctly.

The screenshot shows the "Edit Property Values" page. At the top, a green header bar contains the text "Property Set: MyBuyBeansApp" on the left and "finished" on the right. Below the header, there is a section titled "Property: BeaniePoints (Type: Single, Unrestricted)". Below this is a section titled "Edit Property Values" with a red pencil icon. This section includes the text "Enter changes to the property value and click Save." and two fields: "Default Value:" with the value "0" and "New Value:" with a text input field containing "20". At the bottom right, there are two green buttons: "back" and "save".

7. Click **back** to return to the User Properties view page.

8. Click **finished** to save the user's property set values. The system returns to the User Properties view page.
9. Click **home** on the BEA WebLogic Personalization Server banner to return to the Administration Tools Home Page.

3 *Working with User Profiles*

4 Working with Content

The following topics are covered here:

Adding Content

- Ensuring content is available

- Indexing Content with the Bulk Loader

Adding Content

Now that you've set up a user profile and property set to extend MyBuyBeans.com, we need to add the content to the reference implementation Document Management System (DMS) that ships with WLPS. When building your own sites, you might use another DMS such as Interwoven's TeamSite or Documentum, but the reference implementation will meet our needs for this tutorial.

For this tutorial, we've already added the content in the correct directories. You should review the structure, though, to gain an understanding of how to set up your own content using the reference implementation.

To use the reference implementation DMS, you need to perform several steps to:

1. make sure the relevant content for the promotion resides in the correct directory path,
2. check the metadata in the content,
3. run the BulkLoader to load the content's metadata into the DMS,

Ensuring content is available

Before indexing the new content and loading metadata into the DMS, you first need to ensure the files reside in the correct directory. Ensure that the following files reside in the `<install-dir>\dmsBase` directory:

- `hint\hint1.htm`
- `hint\hint2.htm`
- `preview\prev1.htm`
- `preview\prev2.htm`

These files contain the content we will use later in the tutorial.

After ensuring the content you need for the promotion resides in the correct directories, you need to check the metadata that describes the content. The BulkLoader uses this metadata to index content and rules then match the indexed content to user profiles at run-time.

For this tutorial, you should examine the metadata in the HTML files we're using to extend MyBuyBeans.com. Examining the metadata in the files will help you understand how the reference implementation DMS matches content to users.

To examine the metadata in the content source files:

1. Use a text or HTML editor to open a couple of the four `*.htm` files listed in "Ensuring content is available" on page 4-2.
2. Examine the `<meta>` tags inserted into the file. The tags include name and content attributes that constitute the name/value pairs the reference implementation DMS's BulkLoader utility uses to index content. You will see these content names later when we create rules to select content to match to users.
3. Close the file without saving any changes.

Indexing Content with the Bulk Loader

You have examined the content's metadata. We'll now index the metadata using the reference implementation DMS's BulkLoader command-line utility. To run this utility:

Note: The following procedure works around a limitation of the evaluation Cloudscape database that ships with WLPS. You can just run the `loaddocs.bat` or `loaddocs.sh` file if you use Oracle with the reference implementation DMS.

1. Since the evaluation version of Cloudscape can only have one application using it at a time, you must stop WebLogic Server before running the BulkLoader.
2. Depending on your platform, add the appropriate entry to the `<install-dir>\bin\win32\loaddocs.bat` or `<install-dir>/bin/solaris2/loaddoc.sh` file:
 - NT: `-Dcloudscape.system.home=%WL_COMMERCE_HOME%\db\data` after `%JDK_JAVA%`
 - Solaris: `-Dcloudscape.system.home=$WL_COMMERCE_HOME/db/data` after `\JDK_JAVA`
3. Run `loaddocs.bat` (NT `bin/win32`) or `loaddocs.sh` (Solaris in `bin/solaris2`).
4. When the BulkLoader finishes indexing the content, restart WebLogic Server.

Note: See Content Management documentation for more BulkLoader instructions.

The BulkLoader indexes metadata for content that resides in the `dmsBase` directory and subdirectories. In our example, this includes all files that reside in the `<install-dir>\dmsBase` directory and its subdirectories.

5. Continue on to "Working with Rules" on page 5-1 to create the rules that match personalized content with MyBuyBeans.com users.

5 Working with Rules

The following topics are covered here:

Creating Rules

- Creating the classifier rules

- Creating the content selector rules

Creating Rules

Since we've indexed the content for the new promotion, we now need to create rules that will match the content with users when they visit MyBuyBeans.com. To implement this functionality, we need to create four rules:

1. A classifier rule that classifies users as frequent shoppers if they've accumulated 15 or more Beanie Points.
2. A classifier rule that classifies users as infrequent shoppers if they've accumulated fewer than 15 Beanie Points.
3. A content selector rule that matches frequent shopper message content to user profiles in the frequent shopper classification.
4. A content selector that matches hints to user profiles in the infrequent shopper classification.

Creating the classifier rules

You will create two classifier rules to classify frequent and infrequent shoppers in this section. We will later use these classifier rules in content selector rules that select a message or hint to display to users of MyBuyBeans.com.

Note: WLPS doesn't save rules until you click the **finished** button in a Rule view page.

1. Make sure WebLogic Personalization Server is running.
2. From the Administration Tools Home Page at `http://<wlhost>:<port>/wlpadmin`, click the Rules Management icon. The Rules Management home page appears.
3. Click the rulesheet named MyBuyBeans to edit it. The MyBuyBeans Rulesheet view page appears.
4. Click **create** in the Classifiers bar to create a new classifier rule. The Create a Classifier Rule edit page appears.
5. Enter the rule name `FrequentShopper` into the Rule Name field.
6. Enter a description of the rule into the Description field. For example, you might type `Classifies users with 15 or more Beanie Points`.
7. Click **create** to add the rule to the MyBuyBeans rulesheet. The Create a Classifier Rule edit page refreshes and displays a message about the rule creation's success.



Create a Classifier Rule

Enter the appropriate information and click create. Fields denoted by a red star are required.

Rule Name: *

Description:

[back](#)[create](#)

Note: We'll add phrases to the rule later in the tutorial.

8. Now create another classifier rule by entering the rule name `InfrequentShopper` into the Rule Name field.
9. Enter a description for this rule. For example, `Classifies users with fewer than 15 Beanie Points`.
10. Click **create** to save the rule in the MyBuyBeans rulesheet. The Create a Classifier Rule edit page refreshes and displays a message about the rule creation's success.
11. Click **back** to return to the MyBuyBeans Rulesheet view page.
12. Leave the MyBuyBeans rulesheet open and create the content selector rules for the previews and hints.

Adding phrases to the classifier rules

We need to add conditions to the classifier rules to classify users depending on the number of Beanie Points they have.

1. Click the `FrequentShopper` classifier rule on the MyBuyBeans Rulesheet view page to open it for editing. The Rule view page appears.
2. Click **phrase** to add a phrase to the rule.
3. Select the Single-Value with Constant template to define the phrase and click **next**. Step 2 of the Create If Phrase Wizard appears.
4. Click on the `USER.BeaniePoints` property to define the left operand of the rule phrase and click **next**. Step 3 of the Create If Phrase Wizard appears.

Rulesheet: MyBuyBeans
Rule: FrequentShopper

Create If Phrase Wizard
Template: Single-Value with Constant (OR)

2 Select a property for the rule phrase and click next.

Property

| |
|----------------------|
| USER.BeaniePoints |
| USER.LeadingCategory |
| USER.Total |

back next

5. Select the \geq comparator from the Comparator drop-down list box and enter the value 15 into the Constant field.

Rulesheet: MyBuyBeans
Rule: FrequentShopper

Create If Phrase Wizard
Template: Single-Value with Constant (OR)

3 Complete the rule phrase by selecting the appropriate information. Click the or button to add any number of OR conditions to the current phrase. When finished, click save.

| Property | Comparator | Constant | |
|-------------------|------------|----------|----|
| USER.BeaniePoints | \geq | 15 | or |

back save

6. Click **save** to add the phrase to the rule. The Rule view page appears with the new phrase displayed.

Rulesheet: MyBuyBeans

finished

Definition

edit

Rule Type: Classifier
Name: FrequentShopper
Description: Classifies users with 15 or more beanie points.

If the user has the following characteristics:

phrase

```
user.BeaniePoints >= 15
```

finished

7. Click **finished** to save the rulesheet and return to the Rulesheet view page.
8. Now add a phrase to the InfrequentShopper rule. Click the `InfrequentShopper` classifier rule on the MyBuyBeans Rulesheet view page to open it for editing. The Rule view page appears.
9. Click **phrase** to add a phrase to the rule.
10. Select the Single-Value with Constant template to define the phrase and click **next**. Step 2 of the Create If Phrase Wizard appears.
11. Click on the `USER.BeaniePoints` property to define the left operand of the rule phrase and click **next**. Step 3 of the Create If Phrase Wizard appears.
12. Select the `<` comparator from the Comparator drop-down list box and enter the value 15 into the Constant field.
13. Click **save** to add the phrase to the rule. The Rule view page appears with the new phrase displayed.
14. Click **finished** to save the rulesheet and return to the Rulesheet view page.

Note: Notice how much faster the pages load since the page source code already compiled the first time you accessed the pages.

15. You've completed adding the phrases to the classifier rules. Next, we'll create content selector rules to select promotions and hints depending on the user's classification.

Creating the content selector rules

You've created two classifier rules to categorize users as frequent or infrequent shoppers. In this section, you'll create two content selector rules that use the classifier rules. The content selector rules will match content to users based on the user's classification. Let's create a rule to show site usage hints to infrequent shoppers.

Note: The hints will tell new users how to use MyBuyBeans.com's features, how to find account information, and search for bean products.

1. Click **create** in the Content Selectors bar of the Rules list. The Create a Content Selector Rule edit page appears.
2. Select the `LoadedData` content type from the Content Type drop-down list box.
Note: The `LoadedData` content type results from the reference implementation's `BulkLoader` utility. If you use a different DMS, you will see different content types.
3. Enter the rule name `Hints` into the Rule Name field.
4. Enter a description of the rule into the Description field. For example, `Shows site usage hints to users in the InfrequentShopper classification.`
5. Click **create** to add the rule to the MyBuyBeans rulesheet. The Create a Content Selector Rule edit page refreshes and displays a message about the rule creation's success.

Rulesheet: MyBuyBeans

Create a Content Selector Rule

Enter the appropriate information and click create. Fields denoted by a red star are required.

Content Type: *

Rule Name: *

Description:

[back](#) [create](#)

6. Add another rule that shows promotional messages to frequent shoppers. Enter the rule name `FrequentShopperMessage` into the Rule Name field.
7. Enter a description of the rule into the Description field. For example, `Selects a preview message for users in the FrequentShopper classification.`
8. Click **create** to save the new rule in the MyBuyBeans rulesheet. The Create a Content Selector Rule edit page refreshes and displays a message about the rule creation's success.
9. Click **back** to return to the MyBuyBeans Rulesheet view page.

Now we'll add conditions to the `Hints` rule.

Adding conditions to the Hints rule

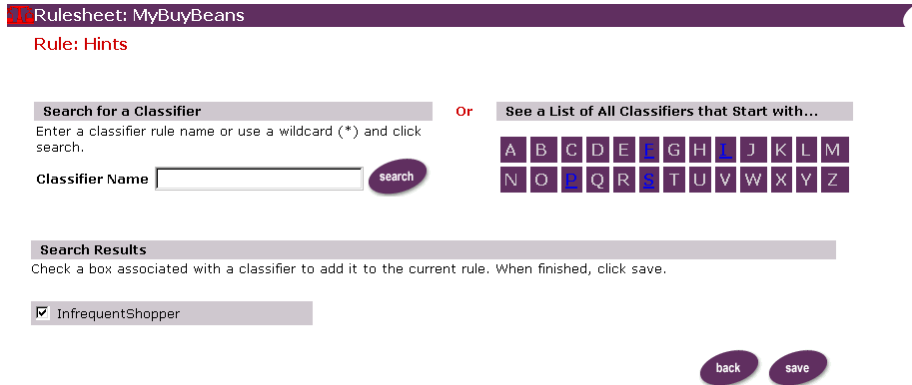
1. Click the `Hints` content selector rule on the MyBuyBeans Rulesheet view page to open it for editing. The Rule view page appears.

The screenshot shows a web interface for editing a rule. At the top, a purple header bar contains the text "Rulesheet: MyBuyBeans" and a "finished" button. Below this, a grey bar labeled "Definition" contains the following information: "Rule Type: Content", "Content Type: LoadedData", "Name: Hints", and "Description: Provides hints on BuyBeans site usage." To the right of this bar is an "edit" button. Below the definition bar are three more grey bars, each with a red button on the right: "If the user has the following characteristics:" with a "class" button, "And when:" with a "phrase" button, and "Then display content based on:" with a "phrase" button. At the bottom right of the interface is a "finished" button.

2. Click **class** (classifier) in the If the user has the following characteristics bar to add a classifier to the `Hints` rule. The Rule search page appears.
3. Enter `InfrequentShopper` in the Classifier Name field to find the `InfrequentShopper` classifier rule and click **search**.

Note: The `*` character allows you to perform a wildcard search. Using the `*` character alone returns a list of all classifier rules.

4. Check the box next to the `InfrequentShopper` classifier rule. This will add the classifier to the `Hints` rule when you click **save**.



5. Click **save** to commit the changes. The Rule search page refreshes and displays a message about the process's success.
6. Click **back** to return to the Rule view page. The Rule view page appears with the new classifier displayed.
7. Click **finished** to save the rulesheet and return to the Rulesheet view page.
8. Click the **Hints** content selector rule on the MyBuyBeans Rulesheet view page to open it for editing again. The Rule view page appears
9. Click **phrase** in the "Then display content based on" bar. Step 1 of the Create Then Phrase Wizard appears.
10. Select the Value with Constant template to use to define the content query and click **next**. Step 2 of the Create Then Phrase Wizard appears.
11. Select the `CONTENT.shoppingFrequency` property from the Property list and click **next**. Step 3 of the Create Then Phrase Wizard appears.

Note: This content property comes from the information in the `<meta>` tags in the `hints1.htm` and `hints2.htm` files the BulkLoader indexed earlier.
12. Select the `==` comparator and enter `InfrequentShopper` into the Constant field. Click **save** to add the phrase to the rule. The Rule view page appears with the new phrase displayed.

Note: The value `InfrequentShopper` is stored in the metadata in the `hint1.htm` and `hint2.htm` files. We loaded the metadata using the `BulkLoader` earlier in the tutorial. At run time, a user who logs in with fewer than 15 Beanie Points will match the `InfrequentShopper` classification and will see the hints content selected through the query defined here.

13. Click **finished** to save the rulesheet and return to the Rulesheet view page.

Next, add the conditions to the `FrequentShopperMessage` rule.

Adding conditions to the `FrequentShopperMessage` rule

1. Click the `FrequentShopperMessage` content selector rule on the `MyBuyBeans` Rulesheet view page to open it for editing. The Rule view page appears.
2. Click **class** (classifier) to add a classifier to the `FrequentShopperMessage` rule. The Rule search page appears.
3. Enter `FrequentShopper` in the Classifier Name field to find the `FrequentShopper` classifier rule and click **search**.

Note: The `*` character allows you to perform a wildcard search. Using the `*` character alone returns a list of all classifier rules.

4. Check the box next to the `FrequentShopper` classifier rule. This will add the classifier to the `FrequentShopperMessage` rule when you click **save**.
5. Click **save** to commit the changes. The Rule search page refreshes and displays a message about the process's success.
6. Click **back** to return to the Rule view page. The Rule view page appears with the new classifier displayed.
7. Now we will add a phrase to select special messages to match to frequent shoppers. Click **phrase** in the Then display content based on bar. Step 1 of the Create Then Phrase Wizard appears.

Note: This phrase defines the query that will execute at run-time if a user matches the `FrequentShopper` classification.

8. Select the Value with Constant template to use to define the content query and click **next**. Step 2 of the Create Then Phrase Wizard appears.
9. Select the `Content.shoppingFrequency` property from the Property list and click **next**. Step 3 of the Create Then Phrase Wizard appears.

Note: The property list receives its data from the metadata stored in the document management system, in this case the reference implementation that loaded metadata using the BulkLoader utility.

10. Select the `==` comparator and enter `FrequentShopper` into the Constant field. Click **save** to add the phrase to the rule. The Rule view page appears with the new phrase displayed.

You've completed indexing the content and creating the rules to match the content to users who log into MyBuyBeans.com. In the next phase, you'll use the Personalization Advisor's JSP tags to create the JSP page to pull the entire personalized application together.

Note: Remember that WLPS doesn't save rules until you click the **finished** button in a Rule view page.

6 Creating the JSP Page

All the pieces to add the new promotion to MyBuyBeans are in place. Now you need to pull the pieces together using a JSP page, add the new portlet to the MyBuyBeans portal, and test the portal.

The following topics are covered here:

Viewing the JSP Page

Viewing the JSP Page

The JSP page displays content based on the defined rules and profile information.

To view the page:

1. Open `tutorial.jsp` in
`<install-dir>\server\public_html\portals\buybeans\portlet.s`.
2. View the JSP code that you will add to the portlet later in this tour.
3. Close `tutorial.jsp` when you finish viewing the page.

7 Editing the MyBuyBeans Portal

The following topics are covered here:

Building the Portlet

Adding the Portlet to the Portal

Building the Portlet

We've created the JSP page for the promotion. We now need to add a portlet that uses the `tutorial.jsp` to the portal.

1. From the Administration Tools Home Page, click the Portal Management icon. The Portal Management home page appears.
2. In the Portlets bar, click **create**. The Create a New Portlet page appears.
3. Type `Tutorial` in the Portlet Name field and append `tutorial.jsp` to the existing content of `portlets/` in the Content URL field.
4. Click **create** to create the new portlet. The page refreshes and confirms that the system created the portlet.
5. Click back to return to the Portal Management home page.

Adding the Portlet to the Portal

1. Click the MyBuyBeans portal to open it. The MyBuyBeans portal view page appears.
2. Notice that the Tutorial portlet is displayed in the list but, as indicated by the graying out, is inactive. You must add the portlet to the MyBuyBeans portal to activate it. Click (+/-) in the Associated Portlets bar to add the Tutorial portlet to the MyBuyBeans portal. The Add or Remove Portlets edit page appears.
3. For the portlet named Tutorial, select the Visible option. This will make the portlet visible to MyBuyBeans portal users.
4. Click **save** to save the changes. The page refreshes and displays a message about the operation's success.
5. Click **back** to return to the MyBuyBeans portal view page. The page appears and the Tutorial portlet name is displayed with a check mark next to it. The check mark indicates that the portlet is visible to MyBuyBeans portal users.
6. Click **finished** to save the MyBuyBeans portal changes. The Portal Management home page appears.
7. Close the administration tool.

We've created the JSP page to match content to users based on the amount of beanie points they have and we've added a portlet to the MyBuyBeans portal to display the content as a message. In the next chapter, we'll deploy the portal and test it to see how content personalization works.

8 Deploying the New MyBuyBeans

The following topics are covered here:

Viewing the New MyBuyBeans Portal

Logging in as a frequent shopper

Viewing infrequent shopper hints

Enhancing the MyBuyBeans Login

Viewing the New MyBuyBeans Portal

We've set up everything we need to view the new MyBuyBeans portal. Now we want to view the `mpbb` portal on the WebLogic Server. The portal requires you to log in. To view the frequent shopper personalization message, we'll log in using one of the users we created earlier, the user called `coo1`. To view the infrequent shopper hints, we won't log into MyBuyBeans; the portal will then treat us as if we have zero Beanie Points.

Logging in as a frequent shopper

1. Point your browser to `http://<wlhost>/<port>/mpbb`.

2. Log in using the user name `cool` with the password `bean`. This is the user we created who had 20 Beanie Points. You will see the messages when you log in because the classifier rule classifies the user as a `FrequentShopper` and the content selector rule `FrequentShopperMessage` retrieves messages to display to frequent shoppers.

Viewing infrequent shopper hints

1. Point your browser to `http://<wlhost>/<port>/mpbb`.
2. Do not log into the portal. Instead, search for any item you wish.
3. After the search completes, you will see a message in a Tutorial portlet because you didn't log in and the default Beanie Points value is zero, the system uses the `InfrequentShopper` classifier rule to classify you as a new shopper. The content selector rule `Hints` retrieves the hint message displayed to you as a new shopper.

Enhancing the MyBuyBeans Login

You can add a couple of lines of code to a login page to have the page increment each user's Beanie Points each time they visit MyBuyBeans.com. To enhance the login, insert code similar to the example below into the login page. The code increments logged in users' Beanie Points by 5 points each time they log in.

```
<!-- Add the current total to the users total in MyBuyBeansApp so we keep a count
of the running total -->

<um:getproperty id="bpoints" propertySet="MyBuyBeansApp"
propertyName="BeaniePoints"/>
<%
long newTot = ((Long)bpoints).longValue() + 5;
Long newTotal = new Long(newTot);
%>
<um:setproperty propertySet="MyBuyBeansApp"
propertyName="BeaniePoints" value="newTotal" />
```

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