

ORACLE®

ATG WEB COMMERCE

Outreach

Version 10.1.1

Administration and Development Guide

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ATG Outreach Administration and Development Guide

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The software is based in part on the work of the Independent JPEG Group.

Table of Contents

1. Introduction	1
2. ATG Outreach System Components	3
ATG Outreach Data Loading Module	3
ATG Outreach and Oracle ATG Web Commerce	4
Overview of ATG Outreach Profile Repositories	4
External User Profile Extensions in ATG Outreach	5
Business Control Center	6
Important Terms	7
3. Installing ATG Outreach	11
Considerations for Installing ATG Outreach in a Multi-Server Environment	11
Using CIM with ATG Outreach	13
Installing the ATG Outreach Server	13
Installing the ATG Outreach Production/Staging Module	14
Installing the ATG Outreach Data Loading Module	15
Installing a DistributorServer for Binary Web Content	15
Post-Installation Setup	16
Performing Post-Installation Setup with CIM	16
Performing Post-Installation Setup Manually	17
4. Starting ATG Outreach	21
Starting ATG Outreach on Your Application Server	21
Running ATG Outreach without Oracle ATG Web Commerce	21
Running ATG Outreach with Oracle ATG Web Commerce	23
Setting MBeanPermissions on Oracle WebLogic	24
Connecting to the Business Control Center	24
Connecting to the Dynamo Server Admin and ACC	25
5. Configuring the ATG Outreach Environment	27
Configuring the ATG Outreach Server	27
Configuring the ImportRMIClient	27
Configuring the ContentDistributorPool	28
Configuring the Profile Browser Display	28
Adding Derived Properties for Segments	28
Campaign Asset Types	29
JSPFileVFSService for E-mail JSPs	31
Insert Page Fragment Feature	31
E-mail Preview	32
Configuring an ATG Outreach Production/Staging Instance	33
Configuring an Import Server	33
Configuring a ContentDistributorPool	34
Enabling the Repository Cache Lock Managers	34
Configuring the TemplateEmailSender	34
Setting ParameterStringCodec	34
SelectiveDeleteVFSService	35
Configuring Deployment	35
Setting Up Destination Repositories	35
Defining the Deployment Topology	37
Setting the ProductionTargetName	37
Adding Deployment Targets to Workflows	38
Configuring an ATG Outreach Staging Environment	39
Setting Up Test Profiles	40
Setting Up Reporting in a Staging Environment	40
Additional Notes about Campaigns in a Staging Environment	40

Setting Up Multisite Campaigns	41
6. Setting Up ATG Outreach Reports	43
Setting Up Reporting for ATG Outreach	43
Configuring the Segments Used for Reporting	44
Scheduling Data Loading	44
Securing Access to Reports	44
Configuring the Reports Tab	45
7. Creating ATG Outreach User Accounts	47
8. Creating Opt-in and Opt-out Segments	49
Example Opt-in/Opt-out Forms	49
Opt-in Forms	49
Opt-out Forms	50
Creating Opt-in and Opt-out Segment Assets	51
Opt-in/Opt-out Segment Monitoring	54
9. Importing Mailing Lists	55
Setting Profile Import Rules	55
Configuring the ImportService Component	57
Changing the Number of Previewed Import Records	57
Importing E-Mail Addresses Longer than 35 Characters	57
10. Managing Campaign Workflows	59
Campaign Process Workflow	59
Campaign Project Workflow	60
List Import Process Workflow	64
List Import Project Workflow	64
Campaign Template Process Workflow	66
Campaign Template Project Workflow	66
Default Workflow Permissions	66
A. OptOutFormHandler	71
B. B: Slot Configuration Requirements	73
Index	75

1 Introduction

Oracle ATG Web Commerce Outreach (ATG Outreach) adds online campaign management tools to an ATG product installation, giving business users an efficient way to create and manage e-mail and Web-based marketing campaigns and to integrate marketing activities executed through other channels. This guide covers the technical aspects of ATG Outreach administration and development. It includes the following information:

[ATG Outreach System Components \(page 3\)](#)

[Installing ATG Outreach \(page 11\)](#)

[Starting ATG Outreach \(page 21\)](#)

[Configuring the ATG Outreach Environment \(page 27\)](#)

[Setting Up ATG Outreach Reports \(page 43\)](#)

[Creating ATG Outreach User Accounts \(page 47\)](#)

[Creating Opt-in and Opt-out Segments \(page 49\)](#)

[Importing Mailing Lists \(page 55\)](#)

[Managing Campaign Workflows \(page 59\)](#)

[Appendix A, `OptOutFormHandler` \(page 71\)](#)

[Appendix B, `B: Slot Configuration Requirements` \(page 73\)](#)

The browser-based Business Control Center is the main user interface for campaign creation and management. For more information about the campaign tools in the Business Control Center, see the *ATG Outreach Guide for Business Users*.

Note: This guide assumes that you are familiar with the Oracle ATG Web Commerce platform and ATG Content Administration. For more information about these products, refer to the following guides:

[ATG Content Administration Programming Guide](#)

[ATG Content Administration Guide for Business Users](#)

[ATG Personalization Programming Guide](#)

[ATG Personalization Guide for Business Users](#)

[ATG Business Control Center Administration and Development Guide](#)

[ATG Business Control Center User's Guide](#)

2 ATG Outreach System Components

There are two main parts to the ATG Outreach system:

- The **ATG Outreach server** runs in your development environment and enables ATG Outreach users to create and manage campaigns via the Business Control Center. It takes advantage of the asset management (“versioning”) and deployment facilities provided by the underlying ATG Content Administration system.
- The **ATG Outreach Production/Staging module** runs on all staging, production and e-mail rendering servers (your deployment targets). It provides run-time support for deployed campaigns, monitors the status of campaign-generated scenarios, and collects and processes reporting data.

For a diagram of an ATG server configuration that shows how the ATG Outreach pieces relate to other applications, refer to the *ATG Multiple Application Integration Guide*.

Your business goals and specific technical requirements determine the number and kind of servers you set up within your campaign development and production environments. Note that you have the option of rendering e-mail content from your ATG Outreach production server(s) or from one or more dedicated rendering servers. An e-mail rendering server is configured just like an ATG Outreach production server (and requires access to the same content and profile repositories), but it does not serve Web content. Dedicated rendering servers are recommended for high-volume e-mail campaigns. See also [Considerations for Installing ATG Outreach in a Multi-Server Environment](#) (page 11).

ATG Outreach Data Loading Module

ATG Outreach provides reporting components you can use to create reports on campaign-related data (see the *ATG Outreach Guide for Business Users* for information on the types of report available). The loading of ATG Outreach reporting data into the ATG Data Warehouse is performed by the ATG Outreach data loading module, `ACO.Communication.DW`. For evaluation purposes, this module can run on the same server as the ATG Outreach Production/Staging module. For production purposes, however, this module must run on a dedicated server. Note that it **cannot** use the same server as other ATG data loaders. The *Architecture Overview* section in the *ATG Multiple Application Integration Guide* contains a diagram showing recommended server architecture.

Important: Unlike other ATG 10.1.1 applications, ATG Outreach does not integrate with Oracle Business Intelligence for reporting. Instead it uses an existing ATG Customer Intelligence installation to provide reports. Documentation for ATG Customer Intelligence is available in the Oracle ATG Web Commerce 10.0.2 library on the Oracle Technology Network. The *ATG Multiple Application Integration Guide* for 10.0.2 includes an architecture diagram showing the relationship between the ATG Outreach data warehouse load server and an ATG Customer Intelligence server.

To use ATG Outreach reporting features you must configure the ATG Outreach data loading module. Procedures for doing so are given later in this guide.

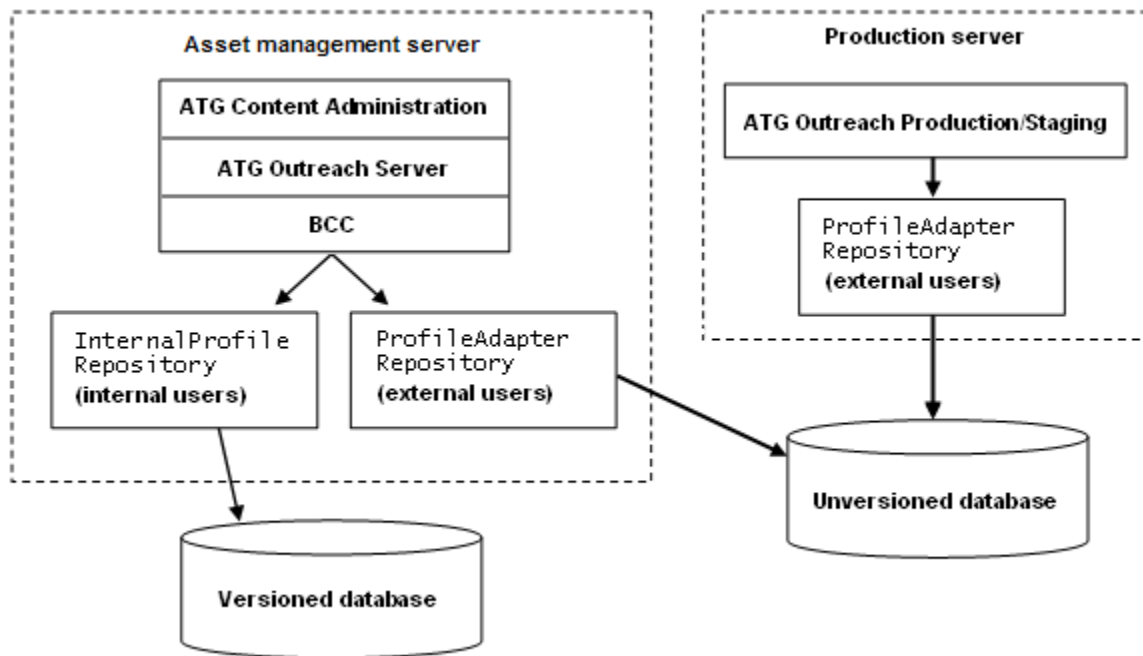
ATG Outreach and Oracle ATG Web Commerce

If your product environment includes Oracle ATG Web Commerce, you can include Commerce events and actions in ATG Outreach campaigns (for example, you can create segments based on a user's purchase history or add an action to a campaign that gives users a discount on specified items). An additional set of reports is also available to you – these show Commerce data that is related to each campaign (see the *ATG Outreach Guide for Business Users* for more information). To be able to use Commerce elements in campaigns, or to view Commerce-related data in reports, you must install and configure Commerce and ATG Customer Intelligence.

Overview of ATG Outreach Profile Repositories

ATG Outreach uses the same internal/external profile repository models as the ATG platform.

If you do not run the ATG Outreach server with the `-layer Preview` option, the following repository configuration is used:



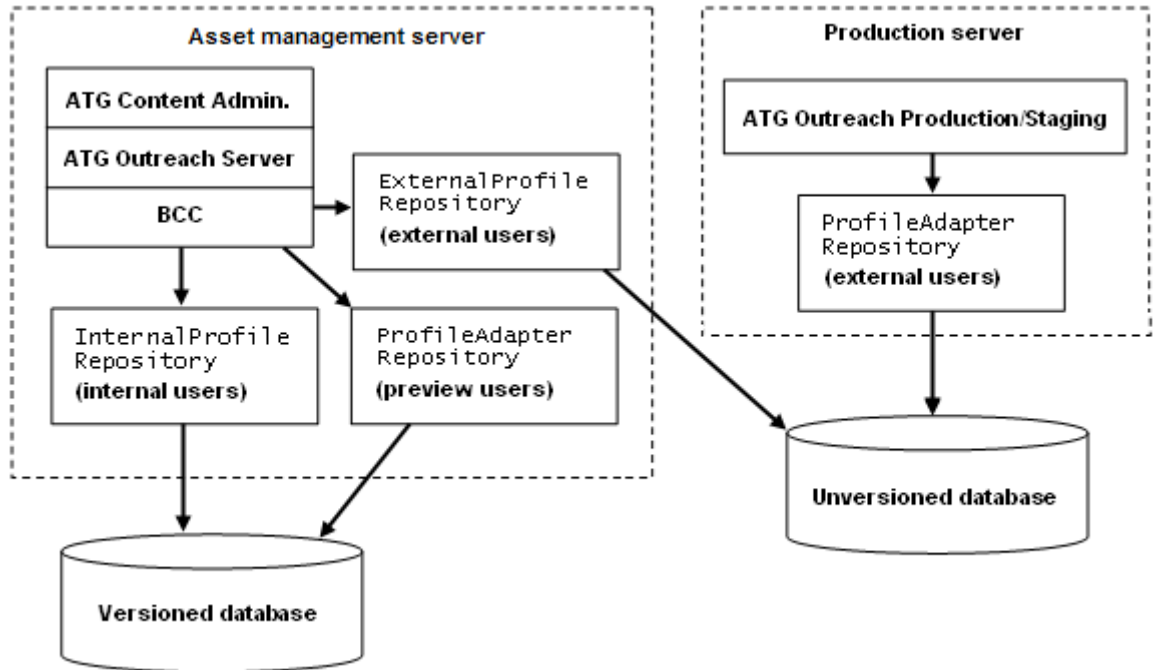
ATG Outreach Profile Repository Model without Preview

In this model, the ATG Outreach server references two profile repositories:

- An `InternalProfileRepository`, which stores profiles for internal ATG Outreach users. This repository references the versioned database.
- A `ProfileAdapterRepository`, which points to the production (unversioned) database. This repository is used by all ATG Outreach features that query customer profile data, including the segment editor, the segment count feature, and the Profile Browser, which allows users to view a list of the profiles included in a segment.

The ATG Outreach Production/Staging module references an instance of the `ProfileAdapterRepository` that points to the production (unversioned) database. This repository is used to store customer profiles.

If you run the ATG Outreach server with the `-layer Preview` option so that you can use e-mail preview features, the following model is used instead of the one shown previously:



ATG Outreach Profile Repository Model with Preview Enabled

This model is different from the non-preview version in the following ways:

- A `ProfileAdapterRepository` instance on the asset management server is used to store a set of profiles used by preview features. Specifically, this component references `dps*` tables (for example, `dps_user`) in the versioned database.
- For querying customer data through the segment count feature and the Profile Browser, ATG Outreach uses an `ExternalProfileRepository`, which points to the production (unversioned) database.

Note that the segment editor itself still refers to the `ProfileAdapterRepository` on the asset management server, as it does when preview is not enabled.

The ATG Outreach Production/Staging module references an instance of the `ProfileAdapterRepository` that points to the production (unversioned) database. This repository is used to store customer profiles.

For information on configuring these repositories, refer to the *ATG Business Control Center Administration and Development Guide*.

External User Profile Extensions in ATG Outreach

ATG Outreach extends the standard external profile repository that is provided with the ATG platform. To the standard profile, ATG Outreach adds properties that are used to track settings such as a customer's opt-in preferences for receiving e-mails. These extensions are defined by `userProfile.xml` files that are stored in the following ATG Outreach modules:

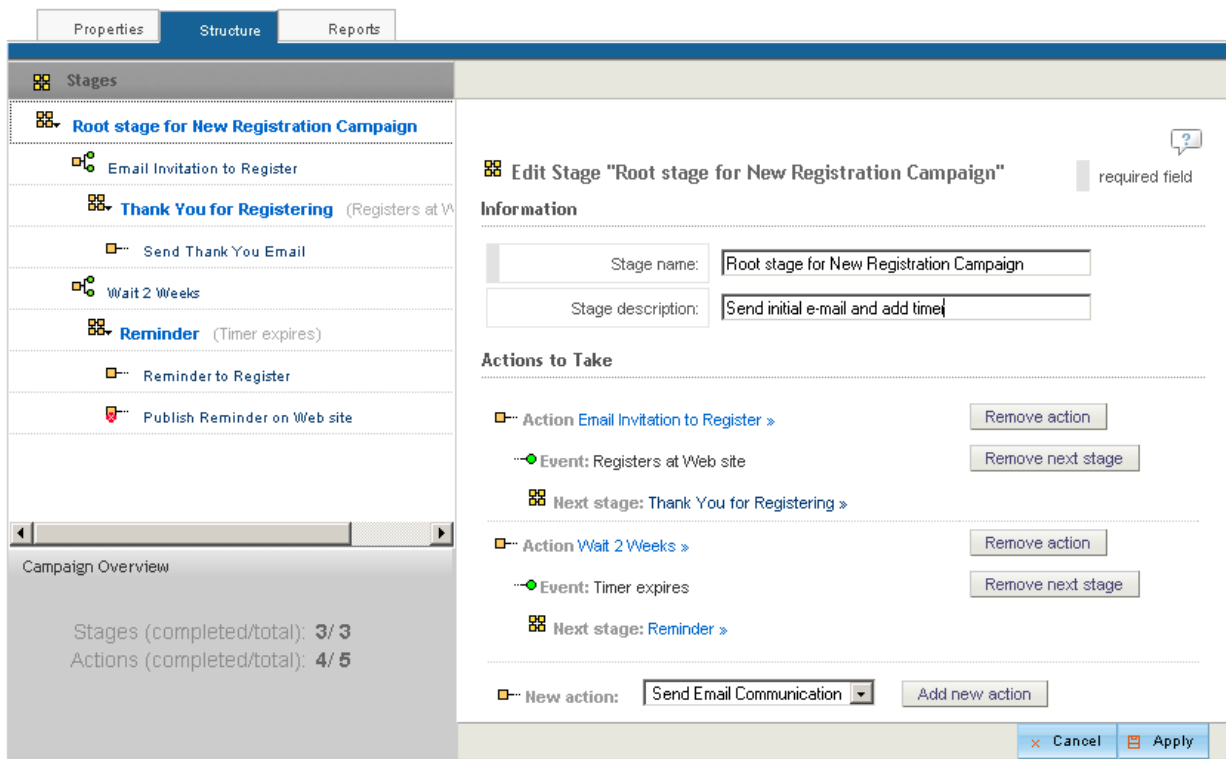
- `ACO.communication.ExternalUsers`: stores profile extensions used by the ATG Outreach server
- `ACO.framework.ExternalUsers`: stores profile extensions used by the ATG Outreach Production/Staging server

If you need to add any custom properties to the external profile repository used by ATG Outreach, extend the profile repository definition located in the appropriate `ExternalUsers` module. See the *ATG Personalization Programming Guide* for information on how to do so.

These modules are started automatically by the base modules you use to start an ATG Outreach application, so you do not have to include them specifically in the `runAssembler` command (see [Starting ATG Outreach \(page 21\)](#)). However, if you are running ATG Outreach in a multiple ATG application environment, and you want to ensure that the profile property values added by ATG Outreach are visible to users of other ATG applications, make sure you run the `ACO.communication.ExternalUsers` module on the servers where those users are viewing profiles. (The `ACO.communication.ExternalUsers` module starts the `ACO.framework.ExternalUsers` module automatically.) For detailed information on this configuration, refer to the *ATG Multiple Application Integration Guide*.

Business Control Center

Business managers use the browser-based Oracle ATG Web Commerce Business Control Center to create and deploy ATG Outreach campaigns. The image below shows the campaign design page:



ATG Business Control Center (campaign design page)

For information on how to create campaigns, see the *ATG Outreach Guide for Business Users*.

Important Terms

This section covers the some of the key terms and concepts related to ATG Outreach. It includes ATG Content Administration terms where these are relevant for ATG Outreach.

Campaign

An ATG Outreach campaign is a planned sequence of marketing-related interactions with a particular group of people (defined as *segments*) within a specific timeframe. ATG Outreach supports both e-mail and web-based campaigns, which are created in the Business Control Center and carried out by auto-generated scenarios. For more information, see the *ATG Outreach Guide for Business Users*.

Segment

Segments are used to define the target audience for a campaign (`Gender is Female OR Age is > 20`, for example). ATG Outreach users can create new segments through the segment editor or by importing a list of contacts (see the [List Import Process Workflow \(page 64\)](#) section for details). To learn more about creating segments, see the *ATG Outreach Guide for Business Users*.

Opt-in segments include users who explicitly subscribe to a particular e-mail category. Opt-out segments, on the other hand, exclude customers who specifically opt out of a certain e-mail category. For information on creating new opt-in and opt-out segments, see the [Creating Opt-in and Opt-out Segments \(page 49\)](#) chapter. To learn about using opt-in and opt-out segments in a campaign, see *Using Opt-In and Opt-Out Segments* in the *ATG Outreach Guide for Business Users*.

Event

An event defines the visitor behavior you want to identify and use as a trigger for the next stage in a campaign. ATG Outreach supports the following events:

A form is submitted
An email is received
Logs in
Logs out
Profile property updated by user
Registers
User opted out
Views item
Visits (a page)

Oracle ATG Web Commerce adds the following events:

Abandoned Order Converted
Abandoned Order Lost
Abandoned Order Reanimated
Gift Purchased
Item Added to Order
Item Quantity Changed in Order
Item Removed from Order
Order Abandoned
Order Saved
Order Submitted
Promotion Closeness Disqualification
Promotion Closeness Qualification

Promotion Offered
Promotion Revoked
Uses Promotion

For information on using these events in a campaign, see the *ATG Outreach Guide for Business Users*.

Note that you can control which events appear in the campaign editing UI through the `bcc-expert` flag in the `scenarioManager.xml` file where the event is registered. If an event does not appear in the default list defined for ATG Outreach, and you would like it to, remove the `bcc-expert` flag for that event. You can use the same mechanism to show or hide custom events. Individual parameters for events can also be shown or hidden in this way.

Action

An action represents the action you want a campaign to take in response to an event (visitor behavior). ATG Outreach supports the following actions:

Send Email Communication
Wait for Timer
Wait for Event
Publish Web Content
Exit Campaign
Perform Action (Add items to slot, Change, Redirect to Page)

Commerce adds its own actions, for example giving or revoking a promotion.

For information on using these actions in a campaign, see the *ATG Outreach Guide for Business Users*.

As you can for events, you can show or hide actions in the campaign editing UI by setting the `bcc-expert` tag in the `scenarioManager.xml` file where the action is registered. See the description of events in the previous section. Note that for actions, unlike events, you cannot typically configure individual parameters this way.

Project

Each campaign is created as a project within the ATG Content Administration system. A project is associated with an underlying workflow, which determines the tasks in the project and the order in which they can be performed. Tasks typically include authoring and reviewing content and deployment.

In addition to using projects to create campaigns, ATG Outreach also uses projects to manage campaign templates and the list import activity.

For more information about projects, see the *ATG Content Administration Programming Guide*.

Process

A process is the parent object of a project. ATG Outreach adds three process types to the ATG Content Administration system: a campaign process, a campaign template process, and a list import process. Each process has its own workflow. To learn more about processes, see the *ATG Content Administration Programming Guide*.

Asset

An asset is a persistent object used within the context of a campaign. Some campaign assets, like segments, JSP e-mail templates, and targeters, for example, are created in the Business Control Center; slots and scenarios are created in the ACC. To learn more about assets, see the *ATG Content Administration Programming Guide*.

Versioning

ATG Outreach uses the version control mechanism in the underlying ATG Content Administration system to keep track of campaign assets. To learn more about the versioning system, see the *ATG Content Administration Programming Guide*.

Workflow

Workflows are an ATG platform feature that define the lifecycle of a project. ATG Outreach uses workflows to define the campaign development tasks that appear in the Business Control Center and to control how campaigns are deployed. See the [Managing Campaign Workflows \(page 59\)](#) chapter for more information.

Deployment

The ATG Outreach server uses the underlying ATG Content Administration system to deploy campaign assets to the ATG Outreach Production/Staging module. For more information, see the [Defining the Deployment Topology \(page 37\)](#) section.



3 Installing ATG Outreach

This chapter explains how to install the ATG Outreach server and the ATG Outreach Production/Staging module and configure their respective databases. It also describes how to set up reports for ATG Outreach. The chapter includes the following sections:

[Considerations for Installing ATG Outreach in a Multi-Server Environment \(page 11\)](#)

[Using CIM with ATG Outreach \(page 13\)](#)

[Installing the ATG Outreach Server \(page 13\)](#)

[Installing the ATG Outreach Production/Staging Module \(page 14\)](#)

[Installing the ATG Outreach Data Loading Module \(page 15\)](#)

[Installing a DistributorServer for Binary Web Content \(page 15\)](#)

[Post-Installation Setup \(page 16\)](#)

After you complete the basic installation steps, you need to perform some additional configuration tasks to prepare your system for use. See the [Configuring the ATG Outreach Environment \(page 27\)](#) chapter for details.

Note: <ATG10dir> is used throughout this document to represent the directory where ATG 10.1.1 is installed (C:\ATG\ATG10.1.1 or /home/ATG/ATG10.1.1, for example).

Considerations for Installing ATG Outreach in a Multi-Server Environment

This section includes some notes on setting up ATG Outreach to deploy to a cluster of production servers. It is strongly suggested that you review this section before starting the ATG Outreach installation procedures described in the rest of this chapter.

Before you start, please make sure that you have read the documentation listed below.

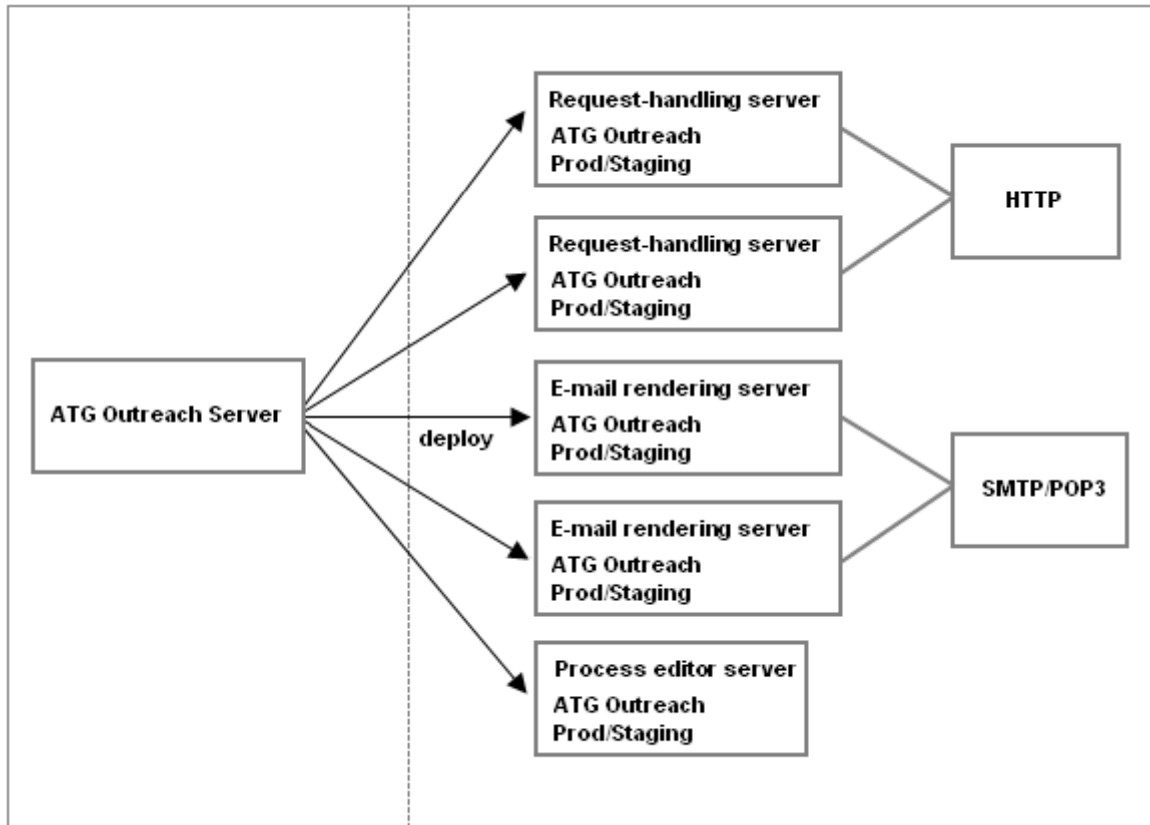
In the *ATG Personalization Programming Guide*:

- *Using Targeted E-Mail*, in particular *Distributing a Mailing across Multiple Servers*
- *Configuring Scenarios*
- *Distributing a Mailing across Multiple Servers*

In the *ATG Content Administration Programming Guide*:

- *Understanding Deployment*
- *Setting Up Deployment*

The diagram below shows a sample multiple-server deployment configuration for ATG Outreach:



Example of Server Configuration in an ATG Outreach Production Cluster

Note the following about this setup:

- There should be only one process editor server in the production environment. Allowing more than one scenario server to run as a process editor server causes duplicate e-mails to be sent for each campaign.
- You must deploy to all production servers, including e-mail rendering servers and the process editor server. To receive deployments from the ATG Outreach server, all servers in the production cluster must be configured as Publishing agents. For example, the HTTP request handling servers may only send out e-mail campaigns, but they must receive deployments so that e-mail management features work correctly.
- The ATG Outreach Production/Staging module must be installed on all target servers.
- You are not required to use dedicated servers for e-mail rendering, as shown in the diagram, but we recommend doing so if your ATG Outreach campaigns require you to send large numbers of e-mails.

Additional recommendations:

- If you do not use dedicated servers for e-mail rendering, we strongly recommend that you use distributed e-mail services, which allow e-mails to be generated in batches by multiple threads. Using distributed e-mail

greatly increases throughput, even if the rendering server is also servicing page requests. Distributed e-mail services are described in *Distributing a Mailing across Multiple Servers* in the *ATG Personalization Programming Guide*. (Note that distributed e-mail is required if you use dedicated e-mail rendering servers.)

- Where possible, avoid having the process editor server handle HTTP requests. If you do include the process editor server in the request-handling cluster, be aware that when the campaign is started, the server will be under a higher load than usual, which will result in worse performance for users who have sessions on that instance. The higher load occurs because the process editor server initiates the scenario that generates the campaign. Depending on the elements in the campaign, the process editor server may be required to make changes to the profiles of a significant number of users.
- If possible, test your campaign e-mail templates outside ATG Outreach (using the `URLHammer` utility, for example) to determine how long each mailing will take. Refer to the *ATG Installation and Configuration Guide* for information on `URLHammer`.

Using CIM with ATG Outreach

Before you start installing ATG Outreach modules, it is suggested you decide whether or not you will use the Configuration and Installation Manager (CIM) to perform post-installation setup. CIM is a utility that guides you through the required configuration tasks, ensuring that all necessary steps are completed in the correct order. Using CIM can significantly shorten the setup time for the product.

Important: If you have already configured other ATG products, and you are now adding ATG Outreach, it is recommended that you not use CIM. If you do choose to set up ATG Outreach with CIM on top of an existing ATG installation, be aware that CIM will reconfigure the existing products. In most cases, as long as you specify the existing installation's parameters, the changes are harmless, but some parts of the process require CIM to recreate database tables and reimport initial data into them, which can cause errors to occur.

This chapter provides instructions for installing and configuring ATG Outreach with and without CIM.

Installing the ATG Outreach Server

This section describes how to install the ATG Outreach server, create the required database tables, and import the initial ATG Outreach data. **Before you begin**, make sure you have the following components installed on your system:

- A supported application server: Oracle WebLogic, IBM WebSphere, or JBoss Application Server.
- ATG 10.1.1, including ATG Content Administration. For setup instructions, see the *ATG Installation and Configuration Guide* and the *ATG Content Administration Programming Guide*.
- A Web browser supported for use with the Business Control Center.

For a detailed list of system requirements and supported configurations for ATG Outreach, including a list of the specific versions of application servers you can use, refer to the Oracle ATG Commerce Supported Environments Matrix document in the My Oracle Support knowledge base at <https://support.oracle.com/>.

Follow these steps to install the ATG Outreach server:

-
1. Download the appropriate Oracle ATG Web Commerce Outreach zip file (Windows or Unix) from the Oracle software delivery Web site.
 2. Unzip the file and run `ATG-ACO10.1.1.bin` or `ATG-ACO10.1.1.exe` to start the setup program.
 3. When the setup program prompts you to choose an installation folder, enter the path to the directory where you installed ATG 10.1.1 (`C:\ATG\ATG10.1.1` or `/home/ATG/ATG10.1.1`, for example).
 4. Select the ATG Outreach Server installation option.

The setup program adds a new `<ATG10dir>/ACO10.1.1` directory to your ATG 10.1.1 installation. It also installs the required Common Application Framework (CAF) in the `<ATG10dir>/CAF<version>` directory.

Installing the ATG Outreach Production/Staging Module

This section describes how to install and configure the ATG Outreach Production/Staging module. As noted in the [ATG Outreach System Components \(page 3\)](#) chapter, you install this module on all staging, production and e-mail rendering servers. **Before you begin**, make sure you have the following components installed on your system:

- A supported application server: Oracle WebLogic, IBM WebSphere, or JBoss Application Server.
- ATG 10.1.1. For setup instructions, see the *ATG Installation and Configuration Guide*. See also the important note below about using CIM.

For a detailed list of system requirements and supported configurations for ATG Outreach, including a list of the specific versions of application servers you can use, refer to the Oracle ATG Commerce Supported Environments Matrix document in the My Oracle Support knowledge base at <https://support.oracle.com/>.

Important: You can install the ATG Outreach Production/Staging module directly onto the servers where you plan to run it, or you can install it on the same machine as your ATG Outreach server and then use CIM to create the appropriate application EAR files and deploy them to the destination servers. The effect is the same; however, CIM requires the latter, so if you want to use CIM, you must install the ATG Outreach Production/Staging module on the same machine as your ATG Outreach server. For more information, see [Performing Post-Installation Setup with CIM \(page 16\)](#). Note also that if you choose to use CIM, you are not required to install the ATG platform on the production, staging, or e-mail rendering servers. CIM includes all necessary platform files for running the ATG Outreach Production/Staging Module in the EAR files it assembles. You can still install the full ATG distribution on these servers if you choose to do so; however, you assemble and deploy your EAR files differently in this case. For more information, refer to the *ATG Installation and Configuration Guide*.

Follow these steps to install the ATG Outreach Production/Staging module:

1. Download the appropriate Oracle ATG Web Commerce Outreach zip file (Windows or Unix) from the Oracle software delivery Web site.
2. Unzip the file and run `ATG-ACO10.1.1.bin` or `ATG-ACO10.1.1.exe` to start the setup program.
3. When the setup program prompts you to choose an installation folder, enter the path to the directory where you installed ATG 10.1.1 (`C:\ATG\ATG10.1.1` or `/home/ATG/ATG10.1.1`, for example).
4. Select the ATG Outreach Production/Staging installation option.

The setup program adds a new `<ATG10dir>/ACO10.1.1` directory to your ATG 10.1.1 installation. It also installs the required Common Application Framework (CAF) in the `<ATG10dir>/CAF<version>` directory.

Installing the ATG Outreach Data Loading Module

ATG Outreach integrates with Oracle ATG Web Commerce Business Intelligence to provide a set of reports you can use to view campaign-related data. In order to use the ATG Outreach reporting features (both the base reports and the enhanced Commerce reports), you need to install and configure the ATG Outreach data loading module (`ACO.Communication.DW`). Specifically, the module loads the data logged by the production environment into the ATG Customer Intelligence Data Warehouse database. Note that this module is sometimes referred to as the ATG Outreach Data Warehouse module.

The data loading module can be installed in any of the following locations:

- On a dedicated server (required for a production environment). As mentioned in earlier in this guide in [ATG Outreach System Components \(page 3\)](#), this server **cannot** also be used for other ATG data loading modules. Refer to the architecture diagram in the *ATG Multiple Application Integration Guide* for 10.0.2 for more information.
- On the production server (for evaluation purposes only)
- On the same machine as the ATG Outreach server. Use this option if you plan to use CIM to perform your ATG Outreach setup. CIM then creates the appropriate application EAR file and deploys it to the destination server (dedicated or production). For more information, see [Performing Post-Installation Setup with CIM \(page 16\)](#).

The module is installed as part of the ATG Outreach Production/Staging module installation. If you want to run the data loading module on the ATG Outreach Production/Staging server, you do not need to rerun the installation. If you want to install and run the data loading module on a dedicated server, however, you need to run the ATG Outreach installation again as described in previous sections. **Before you begin**, make sure you have the following components installed on your system:

- A supported application server: Oracle WebLogic, IBM WebSphere, or JBoss Application Server.
- ATG 10.1.1. For setup instructions, see the *ATG Installation and Configuration Guide*. Note that installing the ATG 10.1.1 platform on a dedicated or production server is not required if you use CIM, which includes all necessary supporting files in the application EAR files it assembles.

Then:

1. Run the `ATG-ACO10.1.1.bin` or `ATG-ACO10.1.1.exe` file to start the setup program.
2. When the setup program prompts you to choose an installation folder, enter the path to the directory where you installed ATG 10.1.1 (on the server you want to use for the data loading module). For example, enter `C:\ATG\ATG10.1.1` or `/home/ATG/ATG10.1.1`.
3. Select the ATG Outreach Production/Staging installation option.

You must also install ATG Customer Intelligence and perform a series of configuration steps to set up reports for your system. The process is described in the chapter [Setting Up ATG Outreach Reports \(page 43\)](#).

Installing a DistributorServer for Binary Web Content

The Publish Web Content campaign action makes it possible for business users to publish text or binary content to a target site. In order to support the publication of binary web content, you need to install a `DistributorServer` component on your HTTP server machine(s).

A standalone `DistributorServer` is included in the Oracle ATG Web Commerce Web Server Extensions 10.1.1 distribution, which you can download from the Oracle software delivery Web site. (For detailed installation and configuration instructions, refer to the *Content Distribution* chapter in the *ATG Platform Programming Guide*.) By default, the `DistributorServer` listens for connections on port 8810 and caches binary files in the `<ATGWebServerExtensions_dir>\home\doc` directory. For example:

```
port=8810
cacheDirectory=C:\\ATG\\ATGWeb10.1.1\\home\\doc
```

You can change these settings by editing the `<ATGWebServerExtensions_dir>\home\localconfig\atg\dynamo\server\DistributorServer.properties` file.

In addition to installing the `DistributorServer` on your HTTP server machine(s), you need to configure the `/atg/campaign/communication/ContentDistributorPool` components on the ATG Outreach server and each ATG Outreach Production/Staging instance. See the [Configuring the ATG Outreach Environment \(page 27\)](#) chapter for details.

Note: The ATG platform includes its own `DistributorServer` under `<ATG10dir>\Distributor`. If you're running an HTTP server and ATG Outreach on the same machine, you can run this `DistributorServer` component instead of the standalone version (described above). Add the `Distributor` module to the `runAssembler` command that you use to start your application server so that it is included in the assembled EAR file. Then add it as an initial service by editing the `<ATG10dir>\home\localconfig\atg\dynamo\Initial.properties` file:

```
initialServices+="/atg/dynamo/server/DistributorServer
```

Post-Installation Setup

After you perform the installation tasks described previously in this chapter, you must complete some additional setup steps before you can start the ATG Outreach servers.

- Create the database schemas for the ATG Outreach server and the ATG Outreach Production/Staging modules.
- Import initial data into the ATG Outreach server schema.
- Configure the data sources for the ATG Outreach server and the ATG Outreach Production/Staging modules.

You can perform these steps manually, or (recommended) you can use the Configuration and Installation Manager (CIM). For details, see the following sections:

- [Performing Post-Installation Setup with CIM \(page 16\)](#)
- [Performing Post-Installation Setup Manually \(page 17\)](#)

Performing Post-Installation Setup with CIM

The CIM utility completes the following configuration steps:

-
1. Creates data sources according to the database connection information you supply.
 2. Creates database schemas and imports initial data.
 3. Creates and configures ATG servers and application servers, including a data warehouse loader server if applicable.
 4. Assembles and deploys the application EAR files for each server.

See the CIM help and the *ATG Installation and Configuration Guide* for additional information on CIM.

To use CIM to configure ATG Outreach, do the following:

1. Install the ATG platform and all required ATG Outreach modules as described at the beginning of this chapter.
2. Start CIM. To do so, switch to `<ATG10dir>\home\bin` at a command line prompt and type:

```
cim
```

3. Follow the prompts. Type `h` at any prompt for more information. See also the tips in the next section, [CIM Product and Add-On Selections for ATG Outreach \(page 17\)](#).

CIM Product and Add-On Selections for ATG Outreach

At the CIM Main Menu, type `P` and press `Enter` to go to the Production Selection screen. Then make one of the following choices:

- To install ATG Outreach without Commerce add-on features, select ATG Outreach.
- To install ATG Outreach so that Commerce add-on features are enabled, select ATG Outreach and either B2B Commerce or B2C Commerce. Make sure both options are selected before you advance to the next screen; otherwise, the Commerce features are not included in the configuration. To select multiple options, type the number that corresponds to the first choice. Then press `Enter` and repeat for the next choice.

At the next screen, Choose Add-Ons, select the ATG Outreach options that are applicable to the environment you are setting up. Some of the add-ons shown for ATG Outreach (for example, Dedicated Lock Servers) are part of the platform configuration. Refer to the ATG 10.1.1 documentation for information on these. Note that the Preview Server option configures ATG Content Administration preview, which is not used by ATG Outreach. Select this option only if you are configuring the platform and want to use this feature with other applications. The separate Outreach Preview option, however, enables the e-mail preview feature and is typically used by most ATG Outreach installations.

If you want to use ATG Customer Intelligence reports with ATG Outreach, select the Reporting add-on. See also [Setting Up ATG Outreach Reports \(page 43\)](#).

Note that you need to complete all the steps in the Main Menu, except Custom CIM Plugin Launcher.

For detailed information on CIM prompts, please refer to the CIM online help.

Performing Post-Installation Setup Manually

This section describes how to perform ATG Outreach setup tasks if you did not use CIM to complete the post-installation configuration.

Creating the Database Schema for the ATG Outreach Server

Follow these steps to create the database tables required by the ATG Outreach server.

-
1. If you haven't done so already, create the database tables for the ATG Content Administration system. See the *ATG Content Administration Programming Guide* for instructions. Make sure the database tables and data are up to date for ATG 10.1.1.
 2. Run the following SQL script to create the ATG Outreach tables:

```
<ATG10dir>\ACO10.1.1\ACO\sql\install\database\management_ddl.sql
```

Note that the schema created by the `management_ddl.sql` script includes the reporting log tables used by older versions of ATG Outreach. These tables are still required by ATG Outreach 10.1.1.

Configuring the ATG Outreach Server Data Source

The ATG Outreach server relies on the database instance configured for the underlying ATG Content Administration system. (This database stores the “versioned” campaign assets checked in to the ATG Content Administration system. It also stores the profiles of ATG Content Administration and ATG Outreach users.) Initially, the ATG Content Administration system uses the default ATG data source, which points to the MySQL evaluation database. If you haven't already done so, you need to reconfigure this data source so it points to a production-quality database.

Configuring the External Profile Repository Data Source

If you have not done so already, configure the data source used by the external profile repository on the asset management (ATG Content Administration) server so that it points to the database on the production server. For ATG Outreach, it is important to set this data source correctly so that the segment count and Profile Browser features reference external profiles.

- Configure the `/atg/dynamo/service/jdbc/JTDataSource_production` component on the asset management server to point to the production database. (You must complete this step even if you are using the MySQL evaluation database.)
- Configure the `/atg/dynamo/service/jdbc/JTDataSource` component on the asset management server to point to the versioned database.
- Configure the `/atg/dynamo/service/jdbc/JTDataSource` component on the production server to point to the production database.

For detailed information, see *Configuring Profile Repository Data Sources* in the *ATG Business Control Center Administration and Development Guide*.

Importing the Initial ATG Outreach Data

To import the initial ATG Outreach data into your database:

1. Make sure your `DYNAMO_HOME` and `JAVA_HOME` environment variables are set. `DYNAMO_HOME` should point to `<ATG10dir>\home` and `JAVA_HOME` should point to the JDK root directory (`C:\Program Files\Java\jdk1.6.0_18`, for example).
2. If you haven't done so already, import the initial ATG Content Administration data. See the *ATG Content Administration Programming Guide* for instructions.
3. Run the following ATG Outreach scripts:

```
<ATG10dir>\ACO10.1.1\ACO\install\importACOManagement.{bat|sh}
```

```
<ATG10dir>\ACO10.1.1\ACO\install\importACO-Outreach.war.{bat|sh}
```

Creating the Database Schema for the Production/Staging Module

Follow these steps to create the database tables required by the ATG Outreach Production/Staging module.

1. If you haven't done so already, create the database tables for the ATG platform. For instructions, see the *Configuring Databases and Database Access* chapter in the *ATG Installation and Configuration Guide*.
2. Run the following SQL script to create the ATG Outreach tables:

```
<ATG10dir>\ACO10.1.1\ACO\sql\install\database\runtime_ddl.sql
```

Configuring the Production/Staging Data Sources

The ATG Outreach Production/Staging module uses the database configured for the ATG platform. The ATG platform is preconfigured to use its own data source, which initially points to the MySQL evaluation database. For information about overriding this default configuration, see the *ATG Installation and Configuration Guide*.



4 Starting ATG Outreach

After you've installed ATG Outreach and completed the basic configuration tasks outlined in the previous chapter, you can start up and connect to the ATG Outreach server via the Business Control Center. This chapter covers the following topics:

[Starting ATG Outreach on Your Application Server \(page 21\)](#)

[Connecting to the Business Control Center \(page 24\)](#)

[Connecting to the Dynamo Server Admin and ACC \(page 25\)](#)

Starting ATG Outreach on Your Application Server

To start ATG Outreach on IBM WebSphere, Oracle WebLogic, or JBoss Application Server, use the `<ATG10dir>/home/bin/runAssembler` script to create an EAR file for each ATG Outreach module. You can then deploy the resulting EAR files to your application server and start them according to the instructions in your application server documentation.

Note: If you used CIM to set up ATG Outreach, the EAR files have already been assembled and deployed, so you do not need to follow the procedures in this section. The ATG Outreach modules start up automatically when you start the application server (for example, JBoss). Refer to your application server documentation for more information.

For a non-CIM environment, the modules you include depend on whether your installation includes Oracle ATG Web Commerce.

- [Running ATG Outreach without Oracle ATG Web Commerce \(page 21\)](#)
- [Running ATG Outreach with Oracle ATG Web Commerce \(page 23\)](#)

Note that your SQL database and the `DistributorServer` must be running before you start your ATG applications. To start the `DistributorServer` on your HTTP server machine(s), run the `startNucleus -m Distributor` command under `<ATGWebServerExtensions_dir>\home\bin`.

Running ATG Outreach without Oracle ATG Web Commerce

The following examples show the modules to include in your EAR files for ATG Outreach if you do not require Commerce features.

For the ATG Outreach server:

```
runAssembler -standalone OutreachServer.ear -m ACO.communication.base
  ARF.base ARF.BIZUI ARF.WSCAP DafEar.Admin <additional modules>
```

If you do not use ATG Customer Intelligence reporting features, omit the `ARF.base`, `ARF.BIZUI`, and `ARF.WSCAP` modules.

You can include the following optional `-layer` commands when you start the ATG Outreach server:

Option	Notes
<code>-layer staging</code>	Include this option if you want to deploy ATG Outreach campaigns to a staging server as well as a production server. Among other changes, this option enables the appropriate staging and production workflow. See Configuring an ATG Outreach Staging Environment (page 39) for more information.
<code>-layer Preview</code>	Include this option if you want to use the e-mail preview feature (see E-mail Preview (page 32)).

Example:

```
runAssembler -standalone OutreachServer.ear -layer Preview -layer staging
  -m ACO.communication.base ARF.base ARF.BIZUI ARF.WSCAP
  DafEar.Admin <additional modules>
```

For the ATG Outreach Production/Staging module:

```
runAssembler -standalone OutreachProductionStaging.ear
  -m ACO.communication.runtime PublishingAgent
  ACO.Communication.DW DafEar.Admin <additional modules>
```

If you do not use ATG Customer Intelligence reporting features, omit the `ACO.Communication.DW` module.

If you are running the ATG Outreach data loading module on a separate server, omit `ACO.Communication.DW` from the EAR file for the Production/Staging module and create a separate EAR file for the data loading module:

```
runAssembler -standalone OutreachDataLoader.ear
  -m ACO.Communication.DW DafEar.Admin
```

Notes:

- The `-standalone` flag is required in all cases.
- The `DafEar.Admin` module shown in the list starts the ATG Dynamo Server Admin. This module is optional.

For detailed instructions on assembling ATG applications, see the *ATG Platform Programming Guide*.

Running ATG Outreach with Oracle ATG Web Commerce

If your installation includes Commerce, include the following modules in your EAR files for ATG Outreach. The additional modules allow business users to include Commerce elements in campaigns and view Commerce-based reports.

For the ATG Outreach server:

```
runAssembler -standalone OutreachServer.ear -m ACO.communication.DCS
  ARF.base ARF.BIZUI ARF.WSCAP DafEar.Admin <additional modules>
```

If you do not use ATG Customer Intelligence reporting features, omit the `ARF.base`, `ARF.BIZUI`, and `ARF.WSCAP` modules.

You can include the following optional `-layer` commands when you start the ATG Outreach server:

Option	Notes
<code>-layer staging</code>	Include this option if you want to deploy ATG Outreach campaigns to a staging server as well as a production server. Among other changes, this option enables the appropriate staging and production workflow. See Configuring an ATG Outreach Staging Environment (page 39) for more information.
<code>-layer Preview</code>	Include this option if you want to use the e-mail preview feature (see E-mail Preview (page 32)).

Example:

```
runAssembler -standalone OutreachServer.ear -layer Preview -layer staging
  -m ACO.communication.DCS ARF.BIZUI ARF.WSCAP DafEar.Admin <additional
modules>
```

For the ATG Outreach Production/Staging module:

```
runAssembler -standalone OutreachProductionStaging.ear
  -m ACO.communication.DCSRuntime PublishingAgent
  ACO.Communication.DW DafEar.Admin <additional modules>
```

If you do not use ATG Customer Intelligence reporting features, omit the `ACO.Communication.DW` module.

If the ATG Outreach data loading module is installed on a separate server, omit `ACO.Communication.DW` from the EAR file for the ATG Outreach Production/Staging module and create a separate EAR file for the data loading module:

```
runAssembler -standalone OutreachDataLoader.ear
  -m ACO.Communication.DW DafEar.Admin
```

Notes:

-
- The `-standalone` flag is required in all cases.
 - The `DafEar.Admin` module shown in the list starts the ATG Dynamo Server Admin. This module is optional.

For detailed instructions on assembling ATG applications, see the *ATG Platform Programming Guide*.

Setting MBeanPermissions on Oracle WebLogic

You may see console errors similar to the following after starting the ATG Outreach server on WebLogic:

```
Unable to resolve component
/atg/campaign/tracking/DynamicCampaignStatusListenerContext
```

To prevent this error from happening, make sure your application server has proper `MbeanPermissions` for adding a notification listener. To do so, add the following line to the `weblogic.policy` and `java.policy` files on both the ATG Outreach and ATG Outreach Production/Staging modules.

```
//This grants permissions of all actions
//on all MBeans
grant
{
    permission javax.management.MBeanPermission "*", "*";
};
```

Connecting to the Business Control Center

Once the ATG Outreach server is running, you can log into the Business Control Center at the URL shown below.

```
http://<ATG Outreach-server-machine>:<port>/atg/bcc
```

The default port numbers for the various application servers are as follows:

- WebSphere: 9080
- WebLogic: 7001
- JBoss: 8080

When the login dialog box appears, enter the username (login name) and password defined in your ATG user profile. The fields are case sensitive. Note that a default profile is provided for administrators. The username is `admin`. The password for this profile is defined through CIM during the post-installation setup process. Alternatively, passwords can be set for this profile through the ACC. Refer to the *ATG Business Control Center Administration and Development Guide* for more information.

The `admin` profile provides all necessary permissions to create and deploy Outreach campaigns. For information about setting up additional user profiles, see the [Creating ATG Outreach User Accounts \(page 47\)](#) chapter.

Microsoft Internet Explorer users: New projects may not appear in the To Do list on the Home page after you create them. The problem may be caused by Internet Explorer's automatic page caching behavior. To resolve it,

in Internet Explorer, select Tools > Internet Options > General > Browsing History > Settings. Change the Check for Newer Versions of Stored Pages option from Automatically to Every Time I Visit the Web Page.

Connecting to the Dynamo Server Admin and ACC

The ATG Control Center (ACC) gives you an easy way to configure ATG Outreach components and manage campaign workflows. The Dynamo Server Admin also provides quick access to a number of helpful developer and admin tools. For instructions on connecting, see the *ATG Installation and Configuration Guide*.

5 Configuring the ATG Outreach Environment

This chapter covers additional configuration requirements for the ATG Outreach server and the ATG Outreach Production/Staging module. It includes the following sections:

[Configuring the ATG Outreach Server \(page 27\)](#)

[Configuring an ATG Outreach Production/Staging Instance \(page 33\)](#)

[Configuring Deployment \(page 35\)](#)

[Configuring an ATG Outreach Staging Environment \(page 39\)](#)

Configuring the ATG Outreach Server

The following topics cover the components you need to configure on the ATG Outreach server:

- [Configuring the ImportRMIClient \(page 27\)](#)
- [Configuring the ContentDistributorPool \(page 28\)](#)
- [Configuring the Profile Browser Display \(page 28\)](#) (optional)
- [Adding Derived Properties for Segments \(page 28\)](#) (optional)

For your reference, the following sections describe components that are preconfigured to help you get started:

- [Campaign Asset Types \(page 29\)](#)
- [JSPFileVFSService for E-mail JSPs \(page 31\)](#)
- [E-mail Preview \(page 32\)](#)

Configuring the ImportRMIClient

(This task is performed automatically by CIM.)

The Business Control Center lets ATG Outreach users import file-based mailing lists for use in their business campaigns. To enable this feature, set the `importMachineHostName` and `importMachineRMIPort` properties of the `/atg/campaign/list/imports/ImportRMIClient` component so it points to the ATG Outreach

Production/Staging instance set up to handle list import operations (see [Configuring an Import Server \(page 33\)](#)). For example:

```
importMachineHostName=GX-270
importMachineRMIPort=8860
```

Note: Imported lists are saved to the <ATG10dir>\home\data\pub\import directory by default. To save the files to a different location, edit the `uploadDirectory` property of the `/atg/campaigns/communication/web/CreateListImportFormHandler` component:

```
uploadDirectory=C:\ATG\ATG10.1.1\home\data\mylists
```

For more about the list import feature, see the [Importing Mailing Lists \(page 55\)](#) chapter.

Configuring the ContentDistributorPool

Set the `serverList` property of the `/atg/campaign/communication/ContentDistributorPool` component so it points to the HTTP server(s) hosting the `DistributorServer` component. For example:

```
serverList=HTTPServer1\:8810,HTTPServer2\:8810
```

Note: You also need to set this property on your ATG Outreach Production/Staging instances.

For more information about the `DistributorServer`, see the [Installing a DistributorServer for Binary Web Content \(page 15\)](#) topic. For more information about the content distributor system, see the *Content Distribution* chapter in the *ATG Platform Programming Guide*.

Configuring the Profile Browser Display

The Profile Browser is the list of profiles that appears when users click a segment count link, either in the campaign creation pages or in a Campaign Details report. By default, the following properties are included in the display:

- `login`
- `firstName`
- `lastName`
- `email`
- `registrationDate`

To change the default, edit the `displayProperties` property in the `/atg/campaign/reporting/ItemBrowserState` component. The property holds a comma-separated list of values.

Adding Derived Properties for Segments

The ATG platform provides derived properties you can use to enable the inclusion of advanced date-related expressions in segments. For example, you can set up a derived property that calculates a customer's age and makes it available in the expression editor.

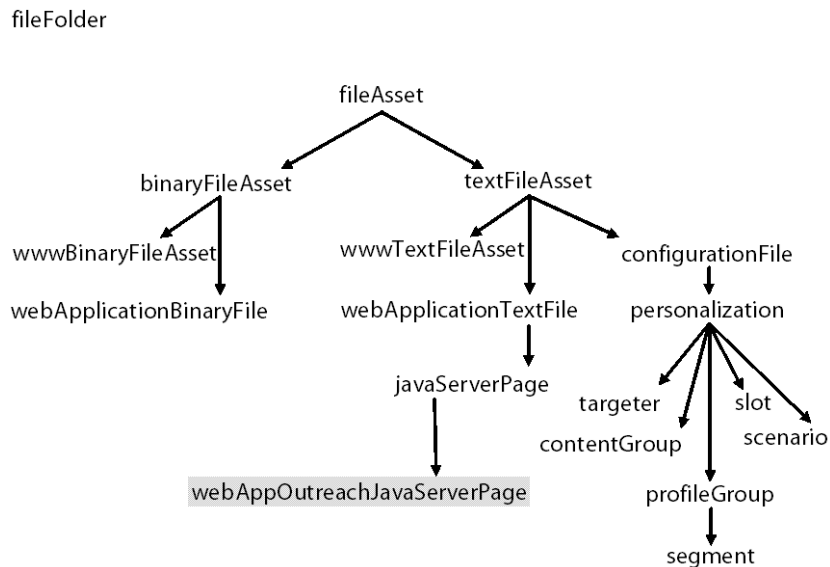
Derived properties work by calculating their values from other properties in the repository. The derived properties you can add are as follows:

- `TimeInterval`: calculates the interval between two specified times.
- `YearMonthDay`: calculates a date from the given values of year, month, and day fields.
- `DaysBeforeAnnualEvent`: calculates the number of days before an annual event occurs.

For detailed information, see *Configuring Derived Properties that Calculate Time and Date* in the *ATG Personalization Programming Guide*.

Campaign Asset Types

As shown in the following diagram, the ATG Outreach server extends the `PublishingFileRepository` by adding a new `webAppOutreachJavaServerPage` subtype under the `javaServerPage` item type. (To learn more about the `PublishingFileRepository` and its item type hierarchy, see the *ATG Content Administration Programming Guide*.)



The `/atg/campaign/communication/Configuration` component on the ATG Outreach server defines `webAppOutreachJavaServerPage` as the default `communicationEmailAssetType` for communication campaigns. The other default configuration settings are shown in the following table:

Property	Description
<code>communicationEmailAssetType</code>	<p>The asset type that e-mail content is saved as within the VFS. By default, this property is set to:</p> <p><code>webAppATGOutreachJavaServerPage</code></p> <p>Note: This asset type can only be exposed by one VFS. See the JSPFileVFS Service for E-mail JSPs (page 31) topic for more information.</p>

Property	Description
<code>communicationEmailTextTemplateContextPath</code>	<p>The context path for the text template. If it begins with a slash, it's the context path for a Web application; otherwise, it's treated as a version manager asset type (e.g., <code>wwwTextFileAsset</code>).</p> <p>By default, this property is set to:</p> <pre>/CampaignsUI</pre>
<code>communicationEmailTextTemplatePath</code>	<p>The path for the text file within the context (Web application or version manager VFS).</p> <p>By default, this property is set to:</p> <pre>/fckeditor/text/textTemplate.jsp</pre>
<code>communicationEmailHtmlTemplateContextPath</code>	<p>The context path for the HTML template. If it begins with a slash, it's the context path for a Web application; otherwise, it's treated as a version manager asset type (e.g., <code>wwwTextFileAsset</code>).</p> <p>By default, this property is set to:</p> <pre>/CampaignsUI</pre>
<code>communicationEmailHtmlTemplatePath</code>	<p>The path for the HTML file with the context (Web application or version manager VFS).</p> <p>By default, this property is set to:</p> <pre>/fckeditor/text/htmlTemplate.jsp</pre>
<code>landingPageJspAssetType</code>	<p>The asset type for JSP landing pages.</p> <p>By default, this property is set to:</p> <pre>/atg/campaign/communication/Configuration.communicationEmailAssetType</pre>
<code>communicationEmailSaveDirectory</code>	<p>The VFS directory to which e-mail communications will be saved.</p> <p>By default, this property is set to:</p> <pre>/Outreach.war/OutreachEmail</pre>

JSPFileVFSService for E-mail JSPs

The ATG Outreach server stores e-mail JSPs (webAppOutreachJavaServerPage assets) in a Virtual File System based on the `atg.vfs.repository.JSPFileVFSService` class. By default, it uses the preconfigured `JSPFileVFSService` instance at `/atg/epub/file/OutreachWebAppFileSystem`, which is configured as follows:

```
$class=atg.vfs.repository.JSPFileVFSService
lastDoneService=/atg/dynamo/service/LastDoneService
contentRepository=/atg/epub/file/SecuredPublishingFileRepository
itemDescriptorNames=webAppOutreachJavaServerPage,webAppOutreachImage
mutableFolderDescriptorName=fileFolder
webAppName=OutreachCommon
webAppBaseDir=/Outreach.war
```

This `/atg/epub/file/OutreachWebAppFileSystem` deploys JSP files to the corresponding `/atg/epub/file/OutreachWebAppFileSystem` on your target sites. See the [SelectiveDeleteVFSService \(page 35\)](#) section for more information.

To create a new VFS for your e-mail JSPs, create a new `JSPFileVFSService` instance and set the `webAppName` and `webAppBaseDir` properties as appropriate for your web application. (Set the other properties as shown above.) **Note:** The `webAppOutreachJavaServerPage` asset type can only be exposed by a single VFS.

For more information about how VFSs are used by the ATG Content Administration system, see the *ATG Content Administration Programming Guide*.

Insert Page Fragment Feature

Business users can personalize the content of e-mails that they send out as part of a campaign by displaying the values of profile properties in the e-mail body (done through the ATG Outreach HTML e-mail editor). However, they can also insert JSP fragments in an e-mail, which allows them to customize the content in any way that is possible through JSP code, as well as giving them a quick way to add commonly used elements such as a company address or disclaimer.

Instructions for including JSP fragments in campaign e-mails are provided in *Inserting Page Fragments* in the *ATG Outreach Guide for Business Users*. However, for any JSP fragment to be available for use, you must perform the following configuration steps:

1. Create the JSP fragment as needed. Note that ATG Outreach provides some samples that you can edit and use as appropriate.
2. In the Business Control Center, create a new project and add a folder asset that you will use to store the JSP fragments. You can use an existing folder or create a new one. Select `/atg/epub/file/ConfigFileSystem` as the repository and Folder as the asset type.
3. Add a new servlet asset to the project. Select `ProcessData` as the repository and Servlet as the asset type, and then click Create New.
4. Provide a name for the servlet.
5. In the Parent Folder field, select the folder you added in step 2.
6. Select Using a JSP File Asset and then click Browse to locate the JSP fragment you want to use. (Note that you can specify as many JSP fragments as you want to make available.) Click Add in the Search tab when you have selected the JSPs.

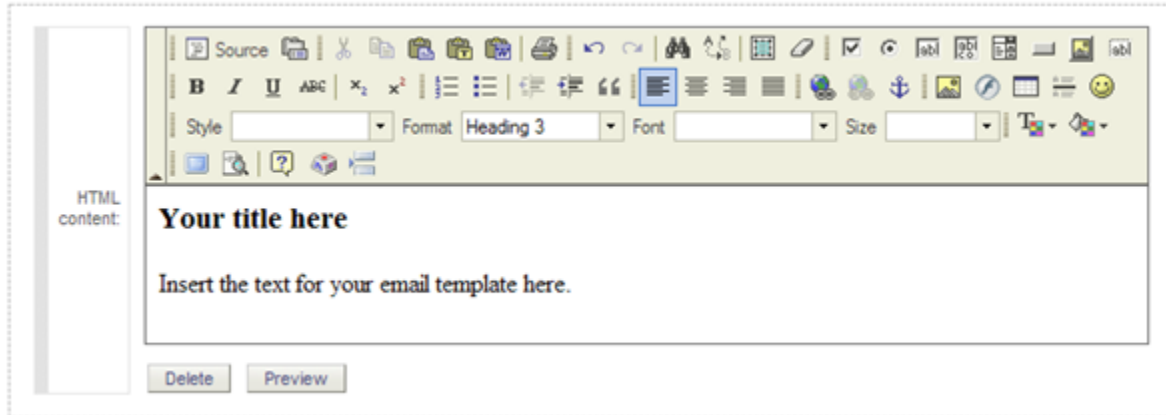
7. Click Apply.
8. Complete the deployment task for the project so that the new assets are deployed.

For more information on working with projects and assets, refer to the *ATG Content Administration Guide for Business Users*.

E-mail Preview

ATG Outreach includes a Preview feature that campaign creators can use before deploying an e-mail campaign to see how the message body will be rendered for a sample user profile. Note that the ATG Outreach feature is thus significantly different from the preview function provided with ATG Content Administration, which allows you to see the effect on a Web page of changes to personalization and scenario assets (segments, targeters, slots, or scenarios) that you are editing in an active project. ATG Outreach can only be used to preview how a message is rendered.

The ATG Outreach preview feature is accessed through a Preview button at the bottom of the HTML e-mail editor, as shown below:



When the user clicks the Preview button, a dialog box appears that shows the profiles available for previewing.

The ATG Outreach preview feature uses an `atg.epub.file.WebAppMirroringCheckinListener` instance to mirror content from the e-mail VFS to a running Web application on the ATG Outreach server. By default, it uses the `/atg/campaign/communication/OutreachWebAppMirror` component, which points to the default `OutreachWebAppFileSystem`:

```
sourceVFS=/atg/epub/file/OutreachWebAppFileSystem
```

The `/atg/campaign/communication/WebAppPreview` component (an instance of `atg.epub.file.WebAppPreviewServlet`) includes `OutreachWebAppMirror` in its `webAppMirrors` list:

```
webAppMirrors+=OutreachWebAppMirror
```

Adding Preview Profiles

The source for the profiles used by the preview feature is the preview profile repository, which is an instance of a `ProfileAdapterRepository` on the asset management (ATG Outreach) server. You can add profiles to

this repository through the Personalization > Preview Users option in the Business Control Center or by copying them from the external user profile repository. The profiles then appear for selection when the campaign creator clicks the Preview button. For more information on configuring and populating the preview profile repository, refer to the *ATG Business Control Center Administration and Development Guide*.

Creating the Preview Pages for ATG Outreach

Create a Web application containing the pages you want to use in the preview. Include the application as a module when you assemble the EAR file, and run the EAR file on the asset management (ATG Outreach) server. For ATG Outreach, the Web application used for previewing must include the following tag libraries: `campaignRuntimeTaglib1_0.jar`, `dspjspTaglib1_0.jar`, `jstl-1_0.jar`, and `jstl-standard-1_0.jar`. For reference, see the `<ATG10dir>\ACO10.1.1\ACO\communication\common\j2ee-apps\Outreach.ear\Outreach.war\WEB-INF\lib` directory.

Starting the ATG Outreach Server with the Preview Config Layer

To enable preview, you must start the ATG Outreach server with the `-layer Preview` switch. (If you do not do so, the Preview button in the HTML editor is not enabled.) See [Starting ATG Outreach on Your Application Server \(page 21\)](#) for more information.

Configuring an ATG Outreach Production/Staging Instance

The following sections explain the tasks involved in configuring a Production/Staging instance:

- [Configuring an Import Server \(page 33\)](#)
- [Configuring a ContentDistributorPool \(page 34\)](#)
- [Enabling the Repository Cache Lock Managers \(page 34\)](#)
- [Configuring the TemplateEmailSender \(page 34\)](#)
- [Setting ParameterStringCodec \(page 34\)](#)
- [SelectiveDeleteVFSService \(page 35\)](#)

Configuring an Import Server

(This task is performed automatically by CIM.)

One of your Outreach Production/Staging instances must be designated as the Import server. All list import and expiration operations are handled by this server. **Note:** There must be only one Import server in an ATG Outreach Production/Staging cluster. This instance should not serve sessions.

Set the `liveImportServiceServerName` property of the Import Server's `/atg/campaign/list/imports/ImportService` component so it matches the `<servername>:<port>` value of the `/atg/dynamo/service/ServerName.serverName` property. For example:

GX-270:8850

The `ImportRMIService` component on the ATG Outreach server must point to the Import Server. Refer to the [Configuring the ImportRMIClient \(page 27\)](#) section for instructions.

For more about the list import feature, see the [Importing Mailing Lists \(page 55\)](#) chapter.

Configuring a ContentDistributorPool

Set the `serverList` property of the `/atg/campaign/communication/ContentDistributorPool` component so it points to the HTTP server(s) hosting the `DistributorServer` component. For example:

```
serverList=HTTPServer1\:8810,HTTPServer2\:8810
```

Note: You also need to set this property on your ATG Outreach server.

For more information about the `DistributorServer`, see the [Installing a DistributorServer for Binary Web Content \(page 15\)](#) topic. For more information about the content distributor system, see the *Content Distribution* chapter in the *ATG Platform Programming Guide*.

Enabling the Repository Cache Lock Managers

(CIM performs this task automatically.)

Configure the `/atg/dynamo/service/ClientLockManager` and `/atg/dynamo/service/ServerLockManager` components according to the instructions in the *ATG Installation and Configuration Guide*.

Note: Only one `ServerLockManager` should be enabled.

Configuring the TemplateEmailSender

Configure the `/atg/userprofiling/email/TemplateEmailSender` component for each ATG Outreach Production/Staging instance that will be sending e-mail. For instructions, see the *Using Targeted E-mail* chapter in the *ATG Personalization Programming Guide*.

Note: You can set `daysContactFatigue` or `hoursContactFatigue` properties to limit the frequency with which campaign e-mails are sent to users. The Business Control Center includes an **Override frequency of contact policy for this e-mail** option, which enables ATG Outreach users to override the `*ContactFatigue` properties for a particular mailing.

Setting ParameterStringCodec

The `/atg/campaign/servlet/ParameterStringCodec` component is used by the ATG Outreach servlet pipeline and ACO tag library to encode and decode parameter strings. It includes a `secret` property, which generates a unique hash value to protect the integrity of e-mail URL parameters. This property must be set to a string value that will not be exposed beyond your production servers.

```
secret=<string_value>
```

Note: You must set this property to the same value on each ATG Outreach Staging/Production instance.

SelectiveDeleteVFSService

The `atg.service.vfs.SelectiveDeleteVFSService` class provides support for selectively deleting files with specific extensions. The ATG Outreach Production/Staging module includes a preconfigured `SelectiveDeleteVFSService` instance at `/atg/epub/file/OutreachWebAppFileSystem`, which receives JSP files deployed from the corresponding `OutreachWebAppFileSystem` on the ATG Outreach server. (See the [JSPFileVFSService for E-mail JSPs](#) (page 31) section for details.) As shown below, the `localDirectory` property is set to the *exploded* Web application directory to which JSPs should be deployed, and the `fileExtensions` property specifies the file types that can be deleted when the VFS is updated by a deployment:

```
localDirectory=<ATG10dir>\ACO10.1.1\ACO\communication\common\j2ee-  
  apps\Outreach.ear  
fileExtensions=jsp,jspf,JSP,JSPF,gif,GIF,jpg,JPG,jpeg,JPEG,css,CSS
```

If you are running ATG Outreach on a third-party application server, you must also add the following line:

```
filePaths=/Outreach.war
```

This setting indicates that only the files in the Web application you are deploying (the JSPs in `Outreach.war`) should be deleted whenever you perform a full deployment. If you do not set this value, files in all Web applications in the path specified by the `localDirectory` property will be deleted, including non-versioned JSPs.

For more information about the `SelectiveDeleteVFSService`, see the *ATG Content Administration Programming Guide*.

Configuring Deployment

The ATG Outreach server uses the underlying ATG Content Administration system to deploy campaign assets to the ATG Outreach Production/Staging module. The ATG Content Administration system itself uses DAF Deployment, the deployment mechanism in the ATG platform, to move assets from a development environment to a staging or production environment. There are some configuration steps you must complete to set up both DAF Deployment and the deployment features in ATG Content Administration for ATG Outreach.

Setting Up Destination Repositories

As explained in the deployment chapters of the *ATG Content Administration Programming Guide*, you must set up a matching destination repository for every versioned repository in your development environment and configure it to point to the unversioned database used by your target sites. For ATG Outreach, the repository for which you must create a matching destination is the Outreach repository on the ATG Outreach server. (This repository is configured by `OutreachRepository.properties`, which is located in `<ATG10dir>\ACO10.1.1\ACO\communication\base\config\config.jar`.)

You must configure a destination Outreach repository for every target you have; for example, if you deploy to both a staging and a production site, you must configure two destination repositories, one for staging and one for production.

Two pre-configured `.properties` files that you can use for your destination repositories are provided with ATG Outreach:

- `OutreachRepository_production.properties`, which is located in `<ATG10dir>\ACO10.1.1\ACO\communication\base\config\config.jar`
- `OutreachRepository_staging.properties`, which is located in `<ATG10dir>\ACO10.1.1\ACO\communication\base\configlayers\stagingandprod\config.jar`

The following example shows the contents of the preconfigured `OutreachRepository_production.properties` file:

```
#
# The initial values of the properties for the OutreachRepository
#
$class=atg.adapter.gsa.GSARepository

repositoryName=OutreachRepository_production

definitionFiles=\
  /atg/campaign/communication/outreachRepository.xml

lockManager=/atg/dynamo/service/ClientLockManager_production
dataSource=/atg/dynamo/service/jdbc/JTDataSource_production
idGenerator=/atg/dynamo/service/IdGenerator
XMLToolsFactory=/atg/dynamo/service/xml/XMLToolsFactory
transactionManager=/atg/dynamo/transaction/TransactionManager

checkTables=true

# since we are running on solid we want to simulate text searches
# this should be removed in a production system
simulateTextSearchQueries=true

#loggingDebug=true
#debugLevel=5
```

Configure the files as described in *Setting Up Deployment* in the *ATG Content Administration Programming Guide*. Locate the new files in the `localconfig` layer on the ATG Outreach server in a directory with the same path as the versioned Outreach repository, for example

```
<ATG10dir>\home\localconfig\atg\campaign\communication\
OutreachRepository_production.properties
```

The destination repositories are included by default in the `additionalAssetSources` list in the `AssetResolver.properties` component, which allows them to be recognized on startup by ATG Content Administration and appear in the Business Control Center deployment UI.

`OutreachRepository_production` is specified as an entry in `/atg/dynamo/service/AssetResolver.properties` in the `<ATG10dir>\ACO10.1.1\ACO\communication\base\config\configuration` layer.

`OutreachRepository_staging` is included in `/atg/dynamo/service/AssetResolver.properties` in the `<ATG10dir>\ACO10.1.1\ACO\communication\base\configlayers\stagingandprod\configuration` layer.

Configuring the Destination Repository Data Sources

For each destination `OutreachRepository` you created for the ATG Outreach server, you need to configure a data source to point to the database used by the target site. Some files preconfigured for this use are supplied with the ATG platform.

```
In <ATG10dir>\DAS\config\config.jar:
```

```
JTDataSource_production.properties
```

```
In <ATG10dir>\DafEar\base\configlayers\stagingandprod\config.jar:
```

```
JTDataSource_staging.properties
```

If you have not done so already (see [Configuring the External Profile Repository Data Source \(page 18\)](#)), extract these files as needed and configure them to point to the **target** database used by the ATG Outreach Production/Staging module. Locate the files on the ATG Outreach server in a `localconfig` directory specified by the `datasource` property of the destination `OutreachRepository_*.properties` file, by default `/atg/dynamo/service/jdbc/`.

For more information, refer to *Setting Up Deployment* in the *ATG Content Administration Programming Guide*.

Defining the Deployment Topology

For ATG Content Administration to be able to deploy campaign assets from the ATG Outreach server to the ATG Outreach Production/Staging modules, you must perform two configuration steps:

- Define each ATG Outreach Production/Staging instance as a target site within the Content Administration system's deployment topology.

Important: Optionally, you can use the default values "staging" and "production" as the names you give your ATG Outreach deployment targets when you define them in ATG Content Administration. Doing so is recommended, because it means you do not then have to make any changes to the deployment elements in the ATG Outreach workflows (see [Adding Deployment Targets to Workflows \(page 38\)](#)). You only have to edit the workflows if you use names other than "staging" and "production." If you choose to use the default names, however, you must set the `queryWorkflowTargetByID` property of the `/atg/epub/Configuration` component to `false` on the ATG Outreach server so that the default name feature is enabled.

- Map the versioned Outreach repository to the destination Outreach repository or repositories you created in the previous sections.

You perform both tasks through the Admin Console option in the Business Control Center. For complete instructions, see *Setting Up Deployment* in the *ATG Content Administration Programming Guide*.

See also the [Managing Campaign Workflows \(page 59\)](#) chapter in this guide.

Setting the ProductionTargetName

After you have defined the deployment topology, set the `productionTargetName` property of the `/atg/campaign/Configuration` component on the ATG Outreach server to the name of your ATG Outreach production deployment target as specified in your topology. The value defaults to `Production`.

The name of the staging server, if your environment uses one, does not need to be configured explicitly.

Adding Deployment Targets to Workflows

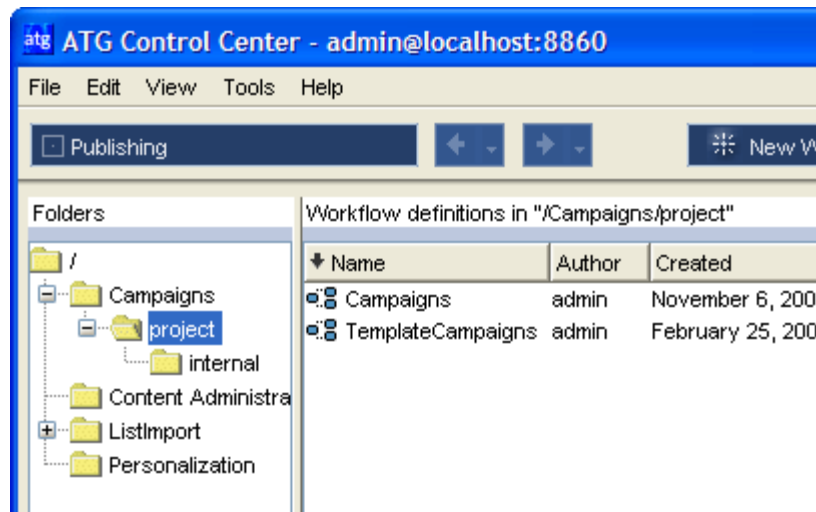
Campaigns and campaign templates are deployed to the target servers specified in the ATG Outreach project workflow. After you have configured your ATG Outreach Production/Staging modules as deployment targets in ATG Content Administration, you must add the targets to the deployment-related elements in the workflow definitions for campaigns and campaign templates.

Note: As mentioned earlier in [Defining the Deployment Topology \(page 37\)](#), you can omit this step if you used the default values “staging” and “production” as the names you gave your ATG Outreach deployment targets in ATG Content Administration.

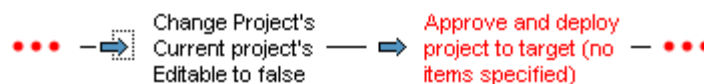
ATG Outreach includes two campaign workflows, a single-target workflow that is typically used to deploy campaigns to a production site, and a dual-target workflow that can be used to deploy to both a staging site and a production site.

Before you begin the steps below, make sure you started the ATG Outreach server with the appropriate commands. The startup commands determine the workflow (staging and production, or production only) that appears in the ACC and the corresponding tasks that appear in the Business Control Center. See [Starting ATG Outreach \(page 21\)](#) for more information. (You can identify the workflow that is being used either by looking at the workflow itself in the ACC, as described below, or by looking at the tasks that appear for the workflow in the project area of the Business Control Center. See [Managing Campaign Workflows \(page 59\)](#) for more information.)

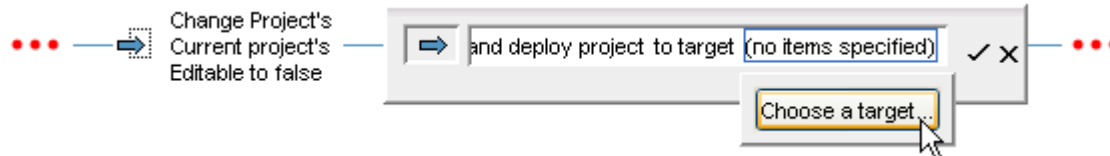
1. Start the ACC.
2. Select Workflow > Publishing > Campaigns > Project. **Note:** Do not open the Internal folder. The workflows you need to modify are located in the top-level Project folder, as shown:



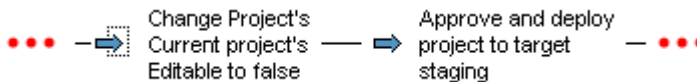
3. Select Campaigns to open the workflow that manages campaign projects.
4. Edit the deployment-related elements so they include the ATG Outreach Production/Staging deployment targets. Unless you used the default names for your deployment targets, all these elements appear in red to indicate they are incomplete.



Partial view of Campaigns workflow: incomplete deployment element



Partial view of Campaigns workflow: editing the deployment element



Partial view of Campaigns workflow: deployment element complete

For information on which server (staging or production) to add to each deployment element, refer to the table at the end of this procedure.

For more information on editing workflow elements, refer to the *ATG Personalization Guide for Business Users*.

5. Save the workflow.
6. Repeat for the TemplateCampaigns workflow, which manages projects for campaign templates.

The table below shows which target to add to each part of the workflow.

Workflow elements	Add this target
All deployment elements in Staging Approval task (task 3)	Staging server
All deployment elements in first Wait for Deployment to Complete task (task 4)	Staging server
Deployment elements in Reject branch of Production Approval task (task 6)	Staging server
All other (non Reject) deployment elements in Production Approval task (task 5)	Production server
All deployment elements in second Wait for Deployment to Complete task (task 7)	Production server

Configuring an ATG Outreach Staging Environment

As described in the previous section, campaigns are deployed to the target server or servers specified in the ATG Outreach project workflow. ATG Outreach includes two workflows, a single-target workflow that is typically used to deploy campaigns to a production site, and a dual-target workflow that can be used to deploy to both a staging site and a production site. The use of a staging site allows you to test campaigns in a non-live environment.

The process of creating a campaign that you intend to test on a staging server before deploying it to a production server is described in detail in the *ATG Outreach Guide for Business Users*. This section describes how to configure the ATG Outreach staging environment.

-
1. On the staging server, install the ATG Outreach Production/Staging module (including all required elements) as described in this guide.
 2. Ensure you start the ATG Outreach server with the correct commands. Refer to [Starting ATG Outreach \(page 21\)](#) for more information.
 3. If necessary, configure the ATG Outreach campaign and campaign template workflows so they include both the staging server and the production server as targets. See the previous section, [Adding Deployment Targets to Workflows \(page 38\)](#), for information.
 4. Add some test profiles to the external user profile repository on the staging server. See [Setting Up Test Profiles \(page 40\)](#) for more information.
 5. Ensure data logging is set up correctly. See [Setting Up Reporting in a Staging Environment \(page 40\)](#).

Setting Up Test Profiles

As part of configuring a staging environment, you must add some external profiles to your ATG Outreach staging server that business users can include in test campaigns. To do so, use the Business Control Center that is running on the staging server. Make sure at least one of the profiles includes a valid e-mail address that will allow business users to receive and validate any e-mail messages sent as part of their campaigns. For information on how to use the Business Control Center to create profiles, refer to the *ATG Business Control Center User's Guide*.

Important: In addition, make sure you do **not** store customer profiles on the staging server. If you do, any customers whose profiles exist in both the staging and production repositories will be included in campaigns twice, once when the campaigns are deployed to staging and again when they are deployed to production.

Setting Up Reporting in a Staging Environment

Do not enable data logging on an ATG Outreach staging server. If you do so, data recorded by test campaigns running on the staging server could be included in reports after the campaigns have been deployed to your production server, which is typically undesirable. To enable logging, create an `<ATG10dir>/home/servers/server_name/localconfig/DWDataCollectionConfig.properties` file and set the `enabled` property to `true`. To make sure logging is not enabled, either do not create the properties file on the staging server, or set the `enabled` property to `false` on the staging server. For more information, refer to the *ATG Customer Intelligence Installation and Configuration Guide* in the Oracle ATG Web Commerce 10.0.2 online documentation library.

Additional Notes about Campaigns in a Staging Environment

Because of the order of tasks in the ATG Outreach staging and production workflows, you must deploy a campaign to your staging server before you deploy it to your production server. For that reason, the campaign will run in both places. The Browse Campaigns page in the Business Control Center includes a column that shows where a campaign is running. Refer to the *ATG Outreach Guide for Business Users* for more information.

Stopping or editing a production campaign through the Business Control Center automatically has the same effect on the corresponding staging campaign. However, you cannot stop or edit staging campaigns independently.

Setting Up Multisite Campaigns

A multisite environment is one in which a single instance of ATG products is used to manage multiple Web sites, especially where the sites are configured to share items such as user profiles and shopping carts. For details on the multisite features available in ATG Outreach, refer to the *ATG Outreach Guide for Business Users*.

To enable multisite campaign support, make sure that all the sites you want to create campaigns for are registered and configured through the Site Administration utility. For the sites to appear as choices in ATG Outreach, they must also be checked into the ATG Content Administration versioning system and deployed. Refer to the *ATG Multisite Administration Guide* for more information.

6 Setting Up ATG Outreach Reports

This chapter describes how to set up the software components required to create and view ATG Outreach reports. It includes the following sections:

[Setting Up Reporting for ATG Outreach \(page 43\)](#)

[Configuring the Segments Used for Reporting \(page 44\)](#)

[Scheduling Data Loading \(page 44\)](#)

[Securing Access to Reports \(page 44\)](#)

[Configuring the Reports Tab \(page 45\)](#)

Setting Up Reporting for ATG Outreach

Note that ATG Outreach 10.1.1 does not integrate with Oracle Business Intelligence for reporting. Instead, it uses an existing ATG Customer Intelligence installation to provide reports.

This section describes the steps required to install and configure reporting components for use with ATG Outreach. Most of these steps are described in detail in the *ATG Customer Intelligence Installation and Configuration Guide* for ATG 10.0.2. The procedure below references sections in that guide where applicable.

The ATG Outreach CIM plug-in includes a Reporting add-on that you can use to configure reporting. For more information, refer to [Installing ATG Outreach \(page 11\)](#) in this guide. The rest of this section describes how to configure ATG Customer Intelligence manually.

1. If you have not already done so, create the data warehouse tables, configure the servers, and configure the required data sources. Follow the steps in the *Configuring ACI* chapter in the *ATG Customer Intelligence Installation and Configuration Guide* for ATG 10.0.2. For ATG Outreach, you need to complete all sections in this chapter EXCEPT *Configuring an Agent Server*.

Note: For the section *Creating the Data Warehouse Tables*, make sure you follow the steps for creating both the ATG platform tables and the ATG Outreach tables. If you are **not** running Commerce, you can omit the step about running the `<ATG10dir>\DCS* scripts`.

2. Follow the steps in the *Importing Reports and Metadata* chapter.

Configuring the Segments Used for Reporting

If you use Commerce with ATG Outreach, locate the `/atg/campaign/communication/reporting/DatasetRecorderManager` component on the ATG Outreach server. Change the `repositoryGroupListIds` property to `CommerceReporting`. This setting determines the segments that are monitored for reporting purposes.

Scheduling Data Loading

The loading of data for reports occurs on a set schedule, which is determined through each `/atg/reporting/datacollection/campaign/*loader` component on the data loading server. These components have a `scheduler` property that points to an instance of `/atg/dynamo/service/Scheduler`. They also have a `runSchedule` property that specifies when the loading should start. If you want to change the default schedule, edit the appropriate settings in the loader component.

The following example shows the relevant properties for the `CampaignLoader` component:

```
scheduler=/atg/dynamo/service/Scheduler
runSchedule=calendar * * * 21 0
stopSchedule=calendar * * * 6 0
```

In this case, the `runSchedule` setting indicates that loading should start at 9 PM every night. The loader checks repeatedly for new work to process until the `stopSchedule` time is reached (here, 6 AM). For more information on the values in the `runSchedule` and `stopSchedule` properties, refer to *Configuring a Schedulable Component* in the *ATG Platform Programming Guide*.

Be aware that the loading of campaign data needs to happen before any order- or e-mail-related data is loaded so that the order and e-mail data can be attributed to the correct campaign. By default, the loader components other than `CampaignLoader` are scheduled to start loading data at 10 PM (one hour after the campaign data is loaded). If you change the schedule on which these activities occur, make sure you maintain this distinction.

Note also that the production database is referenced during the data loading process. For this reason, you should avoid scheduling loading activities to occur during your Web site's busiest time of day.

Securing Access to Reports

ATG Outreach users who want to view reports need a reporting role in addition to their other required roles (see [Creating ATG Outreach User Accounts \(page 47\)](#)). You can assign reporting roles through the Business Control Center as you would any other role. For detailed information on reporting roles and their access rights, refer to *ACI Access Administration* in the *ATG Customer Intelligence Installation and Configuration Guide* for ATG 10.0.2.

Configuring the Reports Tab

Business users access ATG Outreach reports through the Reports tab in the Business Control Center. The Reports tab appears in the campaign editing UI, as shown in the image below. The tab contains a link (“Click here to view campaign reports in the Reporting Center”) that takes users to the Reporting Center.



If the error message “HTTP Status 404 - /arc” appears when users click the link, check that ATG Customer Intelligence has been installed correctly.



7 Creating ATG Outreach User Accounts

In order to control access to the campaign creation and management tools in the Business Control Center, you must create an ATG profile for each ATG Outreach user and make the appropriate role assignments. The initial data you imported into your ATG Outreach server database (see [Importing the Initial ATG Outreach Data \(page 18\)](#)) creates four predefined user roles:

ATG Outreach user role	Business Control Center privileges
Campaign-Admin	Allows user to deploy, start, and stop campaigns
Campaign-Manager	Allows user to review and approve existing campaigns
Campaign-User	Allows user to create and edit campaigns
Campaign-Guest	Allows view-only access to campaigns

Use the Personalization > Internal Users interface in the Business Control Center to create new user profiles and make role assignments. All ATG Outreach users must have at least one of the roles listed above as well as an ATG Portal `/bizui/100001-member` role, which provides basic access to the Business Control Center framework. For detailed instructions on creating new users and making role assignments in the Business Control Center, see the *ATG Business Control Center Administration and Development Guide*.

Campaign administrators may also require the `/EPublishing/EPub-Super-Admin` role, which provides access to the Admin Console tab in the Business Control Center. This tab contains the UI for managing deployments. For more information about the ATG Content Administration roles, see the *ATG Content Administration Programming Guide*.

Some ATG Outreach users may also require access to the targeting UI in the Business Control Center so they can create items such as content targeters. These users require an ATG Content Administration role, for example E-Pub User. For more information, refer to the *ATG Business Control Center Administration and Development Guide*.

To view ATG Outreach reports, users also need one of the reporting roles that allows access to the Report Center, for example Report Viewer or Reporting Administrator. The roles are added to the user profile repository as part of the ATG Customer Intelligence configuration procedure (see [Setting Up ATG Outreach Reports \(page 43\)](#)). You can assign them to users through the Business Control Center, as you would assign any other available role.

Some ATG Outreach users may need to use the ACC so they can work with scenario assets (slots and scenarios). These users need ACC accounts, which you can create through the People and Organizations > Control Center

Users and People and Organizations > Control Center Groups screens in the ACC. Refer to the *ATG Platform Programming Guide* for more information.

For technical information about user profiles, see the *ATG Personalization Programming Guide*.

8 Creating Opt-in and Opt-out Segments

ATG Outreach includes two specialized segment types, **opt-in segments** and **opt-out segments**, to help business users target their campaigns more effectively. Opt-in segments include only those customers who have explicitly subscribed to a particular e-mail category. Opt-out segments, on the other hand, include all customers **except** the people who specifically opt out of an e-mail category.

Before other ATG Outreach users can use opt-in or opt-out segments in their campaigns, you must implement an “e-mail preferences” web form that gives customers a way to opt into or out of selected e-mail categories. You also need to create the opt-in or opt-out segment assets that correspond to each category.

This chapter covers the following topics:

[Example Opt-in/Opt-out Forms \(page 49\)](#)

[Creating Opt-in and Opt-out Segment Assets \(page 51\)](#)

[Opt-in/Opt-out Segment Monitoring \(page 54\)](#)

For additional overview information about opt-in and opt-out segments, and for information on adding them to a campaign, see *Using Opt-In and Opt-Out Segments* in the *ATG Outreach Guide for Business Users*.

Example Opt-in/Opt-out Forms

Note: The example forms in this section are from the Opt In/Opt Out demo pages included with ATG Outreach. To see the demo pages, point your browser to the following URL:

```
http://<hostname>:<port>/atg/outreach/optInOut/optInOutExamplePage.jsp
```

The source files for the demo forms are located in the <ATG10dir>\ACO10.1.1\ACO\communication\common\j2ee-apps\Outreach.ear\Outreach.war\optInOut directory.

For information about creating forms, see the *ATG Page Developer's Guide*.

Opt-in Forms

The `optInTest.jsp` page displays a simple form (shown below) with four “opt in” e-mail categories: Sunny Beach Escapes, Cruise Deals, Family Vacations and Last Minute Deals.

Please send me information on the following:

<input checked="" type="checkbox"/> Sunny Beach Escapes	<input type="checkbox"/> Family Vacations
<input type="checkbox"/> Cruise Deals	<input checked="" type="checkbox"/> Last Minute Deals
<input type="button" value="Save Changes"/>	

As you can see in the following code snippet, this form uses the `/atg/userprofiling/ProfileFormHandler` to set the value of the user's `emailOptIns` profile property. (For more information about the `ProfileFormHandler`, see the *ATG Page Developer's Guide*.)

Note: The value setting of each `dspel:input` tag must match the actual file name of the corresponding opt-in segment. For more information about segment names, see the [Creating Opt-in and Opt-out Segment Assets \(page 51\)](#) section.

```
<table width="456" border="0">

<tr>
  <td align="right"><dspel:input bean="ProfileFormHandler.value.emailOptIns"
    type="checkbox" value="Beach_Escapes"/></td>
  <td valign="middle" align="left">Sunny Beach Escapes</td>
  <td align="right"><dspel:input bean="ProfileFormHandler.value.emailOptIns"
    type="checkbox" value="Family_Vacations"/></td>
  <td valign="middle" align="left">Family Vacations</td>
</tr>

<tr>
  <td align="right"><dspel:input bean="ProfileFormHandler.value.emailOptIns"
    type="checkbox" value="Cruise_Deals"/></td>
  <td valign="middle" align="left">Cruise Deals</td>
  <td align="right"><dspel:input bean="ProfileFormHandler.value.emailOptIns"
    type="checkbox" value="Last_Minute_Deals"/></td>
  <td valign="middle" align="left">Last Minute Deals</td>
</tr>

<tr>
  <td colspan="2" align="right"><dspel:input bean="ProfileFormHandler.update" type="submit"
    value="Save Changes"/></td>
</tr>

</table>
```

If a user selects any of the e-mail categories and submits the form, the `ProfileFormHandler` adds the selected categories to the `emailOptIns` property in his user profile. Conversely, if the user unchecks an e-mail option, the `ProfileFormHandler` removes that category from the `emailOptIns` list.

Once your opt-in form is in place, create and deploy an opt-in segment for each e-mail category in the form. See [Creating Opt-in and Opt-out Segment Assets \(page 51\)](#) for details.

Opt-out Forms

The `optOutTest.jsp` page displays a simple form with four "opt out" e-mail categories: Newsletter, Special Deals, Industry News and Quarterly Account Updates.

Please do not send me the following types of communications:

- | | |
|--|--|
| <input checked="" type="checkbox"/> Newsletter | <input type="checkbox"/> Industry News |
| <input type="checkbox"/> Special Deals | <input type="checkbox"/> Quarterly Account Updates |

Save Changes

Like the previous example, opt-out forms use the `/atg/userprofiling/ProfileFormHandler` to update the user's profile. However, in this case, the form handler updates the `emailOptOuts` profile property.

Note: The value setting of each `dspel:input` tag must match the actual file name of the corresponding opt-out segment. For more information about segment names, see the [Creating Opt-in and Opt-out Segment Assets \(page 51\)](#) section.

```
<table width="456" border="0">
<tr>
  <td align="right"><dspel:input bean="ProfileFormHandler.value.emailOptOuts"
    type="checkbox" value="Newsletter_Opt_Out"/></td>
  <td valign="middle" align="left">Newsletter</td>
  <td align="right"><dspel:input bean="ProfileFormHandler.value.emailOptOuts"
    type="checkbox" value="Industry_News_Opt_Out"/></td>
  <td valign="middle" align="left">Industry News</td>
</tr>
<tr>
  <td align="right"><dspel:input bean="ProfileFormHandler.value.emailOptOuts"
    type="checkbox" value="Special_Deals"/></td>
  <td valign="middle" align="left">Special Deals</td>
  <td align="right"><dspel:input bean="ProfileFormHandler.value.emailOptOuts"
    type="checkbox" value="Account_Status_Opt_Out"/></td>
  <td valign="middle" align="left">Quarterly Account Updates</td>
</tr>
<tr>
  <td colspan="2" align="right"><dspel:input bean="ProfileFormHandler.update" type="submit"
    value="Save Changes"/></td>
</tr>
</table>
```

If a user selects an e-mail opt-out category and submits the form, the `ProfileFormHandler` adds that category to the `emailOptOuts` property in her user profile.

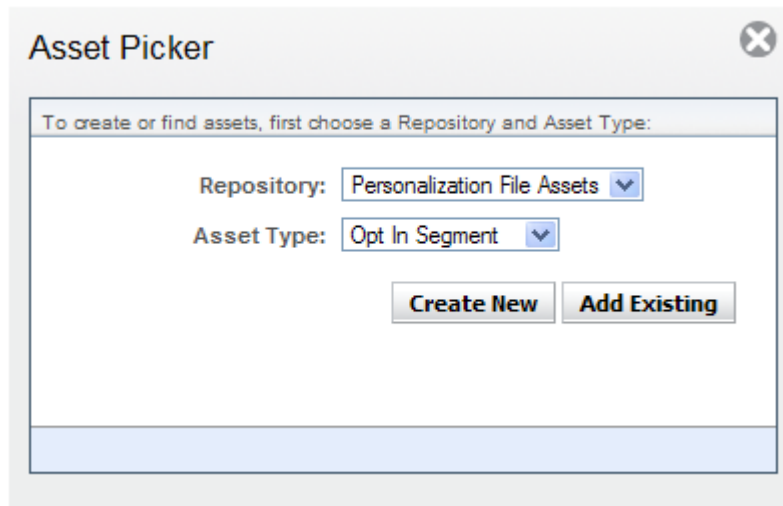
Once your opt-out form is in place, create and deploy an opt-out segment for each e-mail category in the form. See [Creating Opt-in and Opt-out Segment Assets \(page 51\)](#) for details.

Creating Opt-in and Opt-out Segment Assets

Follow the steps below to create new opt-in or opt-out segment assets. As described earlier, an opt-in segment includes only those customers who explicitly subscribe to a particular e-mail category. An opt-out segment

includes all customers by default; only the people who specifically opt out of the corresponding e-mail category will be excluded.

1. Log into the Business Control Center and select Content Administration > Content Administration Project.
2. Give the project a name and optionally a description, and click Continue.
3. Display the Assets tab and click **Add asset to project**.
4. In the Asset Picker, select Personalization File Assets from the Repository list and select Opt In Segment or Opt Out Segment as the asset type.
5. Click Create New.



6. In the segment editor, fill in the segment name. Enter exactly the same value as the `dspe1:input` value setting in the JSP form. See the [Example Opt-in/Opt-out Forms \(page 49\)](#) section for details.

If you enter a multi-word segment name, the Business Control Center automatically adds underscores to the file name.

7. Optionally, enter a description for the segment.
8. Click Apply. The Segment Characteristics field is filled in automatically.

Properties

Edit Opt In Segment

An opt-in segment will include only those customers who explicitly subscribe to a particular e-mail category. required field

Segment name:

Segment description:

Segment characteristics:

- Click **Back to the project's assets**. The Business Control Center displays a list of the opt-in and opt-out segments created so far. For example:

Assets
Project Status: Active

Project Name: test opt-in/out segments
 Type of project: Content Administration Project - (Standard)
 Start Date: Oct 21, 2005 6:37 PM
 Created by: Campaigns Administrator

Assets Changed in This Project
Add asset to project

	Asset Name	Type	Base Version	Current Version	Status
<input type="checkbox"/>	/atg/registry/RepositoryGroups/Email/OptOuts/Newsletter.properties	optOutSegment		1	Created
<input type="checkbox"/>	/atg/registry/RepositoryGroups/Email/OptIns/Cruise_Deals.properties	optInSegment		1	Created

Note: By default, opt-in and opt-out segments are stored under `/atg/registry/RepositoryGroups/Email/OptIns` and `/atg/registry/RepositoryGroups/Email/OptOuts`, respectively. If necessary, you can change these asset paths by editing the `optInsFolder` and `OptOutsFolder` properties of the `/atg/campaign/communication/web/OptInOutSegmentFormHandler` component.

- Display the Tasks tab and complete the approval and deployment tasks for the new segments. For more information, see the *ATG Content Administration Guide for Business Users*.

To see the deployed segments on the ATG Outreach Production/Staging server, open the component browser in the ACC (**Pages and Components > Components by Path**) and navigate to the `/atg/registry/RepositoryGroups/Email` directory. Note that each segment component is an instance of `atg.campaign.list.email.EmailListRepositoryGroup`.

The rules for opt-in segments follow this syntax:

```

Include these users:
  people whose Email Opt-Ins includes Beach Escapes
  and whose Receive email is yes
  
```

The rules for opt-out segments look like this:

Include these users:

people whose Email Opt-Outs does not include Special Deals
and whose Receive email is yes

Opt-in/Opt-out Segment Monitoring

The `/atg/campaign/list/email/EmailListRepositoryGroupMonitor` component runs on the ATG Outreach Production/Staging server. This component is notified when an opt-in or opt-out segment (`EmailListRepositoryGroup`) is deleted. It then scans the database for members of the segment and removes the obsolete segment reference from each member's `emailOptIns` or `emailOptOuts` profile property.

Note that deleting references to obsolete opt-out segments can have drawbacks. Assume a customer opts out of a category of mailings called "cruise offers." The associated opt-out segment is deleted some time later, as is the record of the opt-out in the customer's profile. If a mailing called "cruise offers" is ever created again, the customer's opt-out preference will have been lost and the customer will start receiving the mailings.

Opt-in and opt-out segments are intended to be identical across all nodes in a cluster. For this reason, enable the `EmailListRepositoryGroupMonitor` on only one node in a cluster. (You could have several components of this type monitoring different repositories and item-types, but for each repository/item-type combination, only one node per cluster should handle updates, creations, and deletions for those `EmailListRepositoryGroups`.)

9 Importing Mailing Lists

The Import Email List feature in the Business Control Center allows users to import CSV files containing e-mail addresses and other data for targeting purposes in ATG Outreach campaigns. The import process allows users to match data from the list with properties in the profile repository.

During the import, users have the option of automatically creating a segment that includes the records in the list. If users do not select this option, the records are simply added to the profile repository and can then be included in any segment. Users can also set an expiration date for the imported data; after that date, ATG Outreach removes from the repository any profiles that were created by the list import, provided the profile did not exist already. (Imported lists can also be expired manually; see [Configuring the ImportService Component \(page 57\)](#).)

List import has its own process and project workflows, which are described in [Managing Campaign Workflows \(page 59\)](#).

The Import Email List feature requires some initial setup steps on both the ATG Outreach server and the ATG Outreach Staging/Production servers. For information, see [Configuring the ATG Outreach Environment \(page 27\)](#). There is also some optional configuration you can perform for the import itself; this is described in this chapter.

Setting Profile Import Rules

The `atg/campaign/list/imports/ProfileImportRules` component on the Import Server contains properties you can use to configure various import features according to your business requirements, including the behavior of the import in respect to duplication of existing profiles.

The following table describes properties of the `ProfileImportRules` component that you can configure.

Property	Description	Default
<code>defaultLogin</code>	<p>Specifies the profile property to use as the value of the login property (imported lists generally do not include a login name). The login property is required by the profile repository. The default is to use the email property, which means that the CSV file must include e-mail addresses that can be mapped by the user to the email property.</p> <p>To change, specify any profile property after the characters <code>prop:</code>.</p>	<code>prop:email</code>
<code>defaultPassword</code>	Similar to the <code>defaultLogin</code> property. Creates a hashed password property value from another property.	<code>hash:prop:email</code>
<code>defaultProperties</code>	Similar to the <code>defaultLogin</code> property. For the specified properties, maps other profile properties to use as the default values.	(not set)
<code>errorResponsePolicy</code>	Specifies the response policy to use if an error is encountered during the import. 0 indicates <code>ERROR_SKIP_ENTRY</code> , 1 indicates <code>ERROR_SKIP_REMAINING</code> , 2 indicates <code>ERROR_DELETE_ALL</code> .	0
<code>matchProperties</code>	<p>Use to control duplication of records. Specifies the properties to use to match file entries with existing profiles. If an existing profile repository item matches a record in the CSV file, a new profile is not created. Instead, the profile is marked as belonging to the import that contained the record.</p> <p>Note: Make sure any property you use here is properly indexed in the database, since there is the potential for many queries to be executed against the corresponding columns.</p>	<code>email</code>
<code>overwriteAllProperties</code>	In cases where a matching profile is found in the repository, specifies that existing property values should be overwritten with the values from the CSV file.	<code>false</code>
<code>overwriteProperties</code>	In cases where a matching profile is found in the repository, specifies a list of properties that should be overwritten with values from the CSV file.	(not set)
<code>requiredProperties</code>	Specifies the properties that are required in order for a record in the CSV list to be valid. If any of these properties are unset in the record, the record is skipped and an error is logged.	<code>email</code>

Configuring the ImportService Component

The `/atg/campaign/list/imports/ImportService` component on the Import Server is the service responsible for performing all import operations. You can access the `ImportService` component from the Dynamo Server Admin, which allows you to monitor the current import, showing information about the number of rows that have been processed and the number of errors that have been found. It also allows you to expire imported lists manually. As described earlier, expiring a list removes all profiles marked as being imported by the list, with the exception of any profiles that already existed in the repository.

You can configure the following key properties in the `ImportService` component:

Property	Description	Default
<code>expireOperationBatchSize</code>	Specifies the number of profiles to process in an expire operation for each transaction.	1000
<code>fileFormats</code>	An array of <code>FileFormat</code> components that specifies all available import formats.	<code>/atg/campaign/list/file/CSVFileFormat</code>
<code>importedFileDirectory</code>	The directory where all imported files are placed.	<code><ATG10dir>\home\data\import</code>
<code>importOperationBatchSize</code>	Specifies the number of records to process in a import operation for each transaction.	1000

Changing the Number of Previewed Import Records

By default, the number of records that users can preview before performing the import is five. To increase or decrease this number, edit the `previewRowCount` property in the `/atg/campaign/list/imports/ImportPreview` component on the Import Server.

Importing E-Mail Addresses Longer than 35 Characters

By default, the `ProfileImportRules` component sets the values of the default login and password properties for every new profile to the value of the `email` property. In the default schema for the `dps_user` table, `login` is `varchar(40)` and `password` is `varchar(35)`. Therefore, importing e-mail addresses that are longer than 35 characters causes the import to fail.

If you expect to import e-mail addresses longer than 35 characters, you can change this behavior by editing the `ProfileImportRules` component to use a different property as the default value for the login and password. Alternatively, change the database schema to increase the size of the login and password columns.

10 Managing Campaign Workflows

ATG Outreach provides a set of workflows that define the campaign development tasks in the Business Control Center and control how campaign assets are deployed to your target sites. You can find the ATG Outreach workflow definitions in the ACC under **Workflow > Publishing > Campaigns** and **Workflow > Publishing > ListImport**.

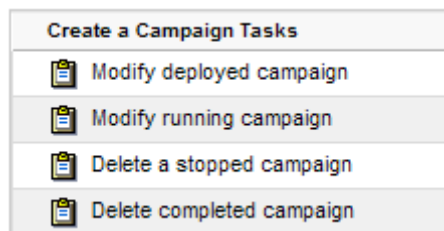
```
/Campaigns/campaignTemplateWorkflow
    /campaignWorkflow
    /project/Campaigns
    /project/TemplateCampaigns
/ListImport/listImport
    /project/listImport
```

Important: You should not edit the ATG Outreach workflows, except in cases where you need to change the access rights for particular tasks or specify deployment targets.

To learn more about using workflows and the ACC's workflow editor, see the *ATG Personalization Guide for Business Users*. For information about workflow configuration, see the *ATG Personalization Programming Guide*. To learn more about the various workflow elements used by the ATG Content Administration system, see the *ATG Content Administration Programming Guide*.

Campaign Process Workflow

The top-level `/Campaigns/campaignWorkflow` is the process workflow invoked when a user selects the **Operations > Outreach > Create a Campaign** option in the Business Control Center. It contains the necessary elements for modifying running campaigns after they have been deployed to a target site. It also handles the stopping and deletion of campaigns. The Business Control Center tasks that are derived from the `campaignWorkflow` are shown below:





This workflow does not itself contain the elements necessary to create a campaign. Instead it acts as a parent or wrapper for the `/Campaigns/project/Campaigns` workflow (see [Campaign Project Workflow \(page 60\)](#) for details), which it invokes to create a new campaign project.

Campaign Project Workflow

The `/Campaigns/project/Campaigns` workflow is the default workflow for creating and deploying campaigns. Two versions of this workflow are available: one for environments that deploy to both staging and production targets, and one for environments that deploy only to a production target. The version that is used is determined by the option you specify in the startup command for the ATG Outreach management server.

Staging and Production Workflow

The version of the workflow that deploys to both a staging and a production server includes the following tasks, as shown below with their display names in the Business Control Center:

Campaign Creation Tasks	
	Author
	Content Review
	Approve for Staging Deployment
	Wait for Staging Deployment Completion
	Approve for Production Deployment
	Wait for Revert to Complete
	Wait for Production Deployment Completion

Author Task

The Author task is active while a campaign is in development, and it has two possible outcomes, Review (which displays as Ready for Review in the Business Control Center) and Delete (which displays as Delete Project).



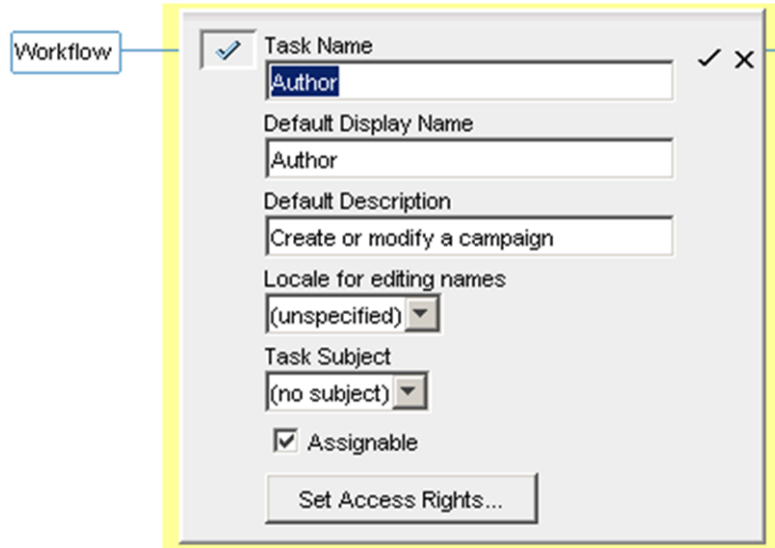
Step 1 of the Campaigns workflow

When a user selects the Delete task outcome, the workflow deletes the campaign project. When a user selects the Ready For Review task outcome, the workflow does the following:

1. Prevents further edits to the campaign.
2. Compares the working version of the assets in the campaign with their checked-in (base) version. If the checked-in version has changed, an error message is displayed in the Business Control Center, and the owner of the author task is asked to resolve the conflict.

3. Advances to the Content Review task.

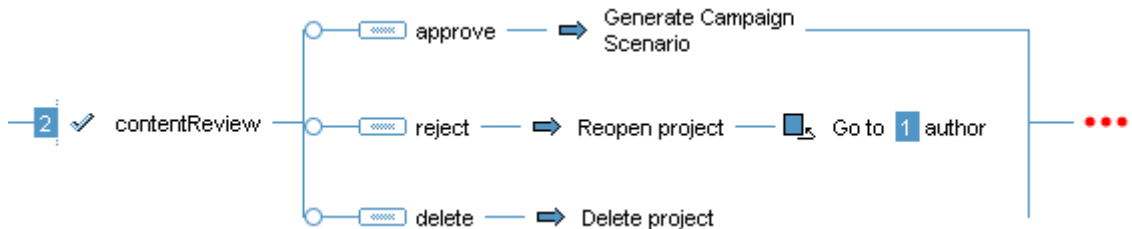
Note: Campaign tasks can be assigned to specific users through the Business Control Center. For a task to be “assignable,” it must be configured as such in the task detail editor. To see the configuration details for a workflow task, double-click on the task name in the ACC workflow editor.



Configuration details for the Author task

Content Review Task

The Content Review task is the second stage in the Campaigns workflow:



Step 2 of the Campaigns workflow

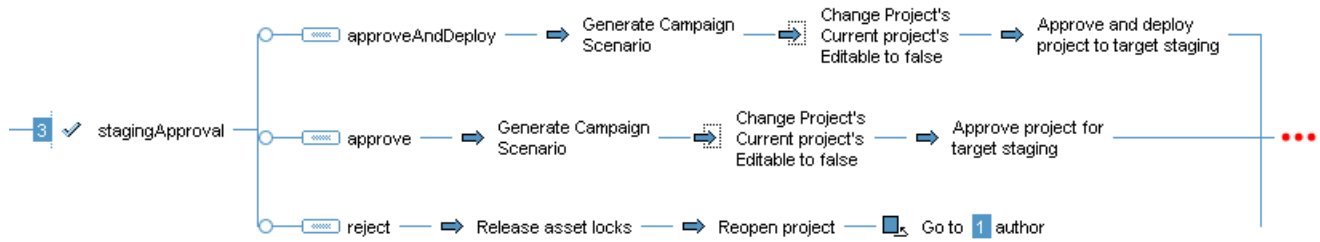
This workflow task includes three outcome elements, Approve, Reject, and Delete, which appear as Approve Content, Reject, and Delete in the Business Control Center.

If the user selects the Delete task action, the workflow deletes the campaign project. If the user selects the Reject action, the workflow reopens the project and then reactivates the Author task so the campaign can be changed.

If the user selects the Approve task action, the workflow generates the scenario that will carry out the campaign and advances to the next task, where the project can be approved for deployment.

Staging Approval Task

(Display name: Approve for Staging Deployment.)



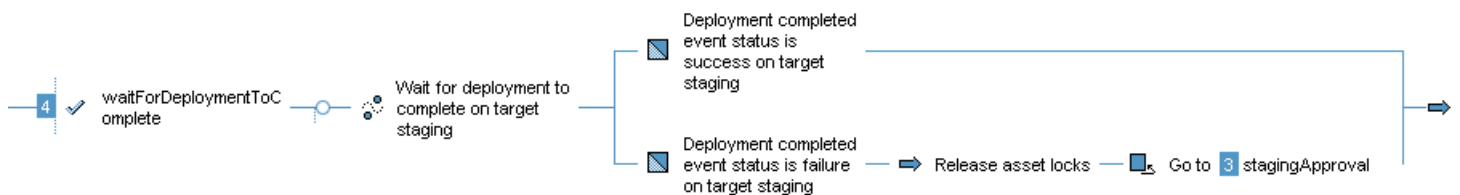
This task has three possible outcomes:

- **Approve and Deploy** (display name: Approve and Deploy to Staging). If the user selects this outcome, the workflow engine does the following:
 - Creates the internal scenario that will be used to manage the campaign.
 - Locks the campaign project so that it cannot be edited in the Business Control Center.
 - Initiates campaign deployment to the specified target.
- **Approve** (display name: Approve for Staging Deployment). If the user selects this outcome, the workflow engine performs the same actions as for the Approve and Deploy task, except that campaign deployment is not initiated. Progress through the workflow is interrupted until the user deploys the campaign manually through the Admin Console in ATG Content Administration. For more information, refer to the *ATG Content Administration Programming Guide*.
- **Reject** (display name: Reject Staging Deployment). With this outcome, the workflow reverts to the Author stage so the campaign can be edited again.

If the deployment elements in this part of the workflow are displayed in red, you need to configure them so they include the deployment target you defined for your ATG Outreach staging server in ATG Content Administration. See [Adding Deployment Targets to Workflows \(page 38\)](#) for more information.

Wait for Deployment To Complete

(Display name: Wait for Staging Deployment Completion.) No Business Control Center user actions are required for this task.



The system waits for one of two events to occur: if it receives a deployment event message indicating deployment has occurred successfully, it moves to the next stage. If it receives a message indicating deployment has failed, for example because the target server became unavailable during deployment, it unlocks the campaign's assets and reverts the project to the Content Approval task. Unlocking the assets is necessary so the project can be returned to a pre-deployment state.

Production Approval Task

(Display name: Approve for Production Deployment.) This stage has similar possible outcomes to the Staging Approval Task:

-
- Approve and Deploy (display name: Approve and Deploy to Production). If the user selects this outcome, the workflow engine does the following:
 - Creates the internal scenario that will be used to manage the campaign.
 - Locks the campaign project so that it cannot be edited in the Business Control Center.
 - Initiates campaign deployment to the specified target.
 - Approve (display name: Approve for Production Deployment). If the user selects this outcome, the workflow engine performs the same actions as for the Approve and Deploy task, except that campaign deployment is not initiated. Progress through the workflow is interrupted until the user deploys the campaign manually through the Admin Console in ATG Content Administration. For more information, refer to the *ATG Content Administration Programming Guide*.
 - Reject (display name: Reject Production Deployment). The workflow reverts the deployment from the staging target and returns the project to the Author stage so the campaign can be edited again.

If the deployment elements in this part of the workflow are displayed in red, you need to configure them so they include the deployment targets you defined for ATG Outreach in ATG Content Administration. See [Adding Deployment Targets to Workflows \(page 38\)](#) for more information.

The Production Approval task includes two additional branches that contain “Runtime campaign status has changed...” elements. These are event elements that are used to track the status of the campaign on the staging server.

Wait for Revert Deployment to Complete

(Display name: Wait for Revert to Complete.) This stage in the Campaigns workflow is invoked if the user selects the Reject outcome in the Production Approval stage. The workflow engine attempts to remove the deployed assets from the production server. If it receives a deployment event message indicating removal of the assets has failed, it reverts to the Production Approval task, requiring the user to attempt to reject the deployment again. If it receives a message indicating the removal has occurred successfully, it unlocks the campaign’s assets and reverts the project to the Author task so the campaign can be edited again.

Wait for Deployment to Complete

(Display name: Wait for Production Deployment Completion.) This stage does not require any user action in the Business Control Center. The system does the following:

1. Waits for a deployment event message with the status Success, which indicates that the campaign’s assets were moved to the deployment target.
2. Performs a second validation by checking that the Project object contains a reference to the target, which indicates the deployment completed successfully.
3. Checks the campaign’s assets into the ATG Content Administration versioning system.
4. Changes the project’s status to Complete. Control of the project is returned to the parent process workflow, which allows you to reopen the campaign for editing or reuse, if necessary (see the description of the campaign process workflow earlier in this chapter).

If the deployment cannot be completed (for example because the target server is not running), the system reverts the workflow to the Production Approval stage.

Production-Only Workflow

The version of the workflow that deploys only to a production server includes four tasks, as shown below with their display names in the Business Control Center:

Outreach Content Administration Project Tasks	
	Author
	Content Review
	Approve for Production Deployment
	Wait for Production Deployment Completion

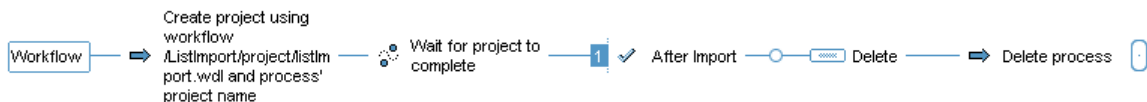
The workflow operates the same way as the Staging and Production workflow described in the previous section, except it does not contain elements that manage interactions with the staging target.

List Import Process Workflow

The top-level `/ListImport/listImport` process workflow is invoked when a user selects the Operations > Outreach > Import Email List option in the Business Control Center. (See the [Importing Mailing Lists \(page 55\)](#) chapter to learn more about this feature.)

As shown below, this workflow creates a new project by calling the `ListImport/project/listImport` workflow (see the [List Import Project Workflow \(page 64\)](#) section for details).

Once the project is complete, the After Import task is activated. This task has one outcome, Delete. If a user selects the corresponding action in the Business Control Center, ATG Outreach deletes system information associated with importing a list. For example, the name of the list is deleted from the Browse Imported Lists page. The operation does not remove any profile information that was imported or changed by the list, nor does it affect the segment that was created automatically as part of the list import (if any). ATG Outreach then deletes the parent process.

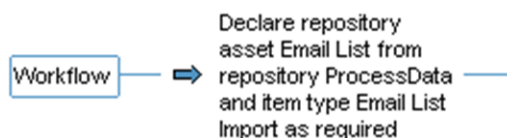


The List Import process workflow

List Import Project Workflow

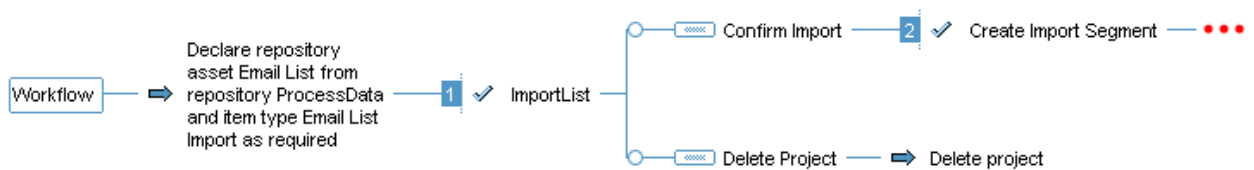
The `ListImport/project/listImport` workflow starts by declaring a repository asset placeholder (Email List) from the `/atg/epub/process/ProcessDataRepository` and setting the Email List Import item type to required. As a result, users must supply an e-mail list before the workflow will continue.

ATG Outreach stores the uploaded list in the `<ATG10dir>\home\data\pub\import` directory by default, although you can change the storage location – see [Configuring the ImportRMIClient \(page 27\)](#) for information.



Import List Task

The ImportList task is the first step in the ListImport/project/listImport workflow:



Step 1 of the Import List project workflow

This task has two possible outcomes, Confirm Import and Delete Project, which correspond to Import List and Cancel choices in the Import an Email List page in the Business Control Center.

If the user selects Cancel, the workflow discards the project. If the user selects Import List, ATG Outreach adds the list entries to the profile repository (`/atg/userprofiling/ProfileAdapterRepository`) on the ATG Outreach Production/Staging instance configured to handle import operations. It then advances to the Create Import Segment task described below.

Note: Deleting the project (discarding it through the Cancel option) does not remove the list from the `<ATG10dir>\home\data\pub\import` directory.

Create Import Segment Task

The Create Import Segment task is the second step in the ListImport/project/listImport workflow:



Step 2 of the Import List project workflow

This task has two possible outcomes, Create Segment and Don't Create Segment, which correspond to the Create User Segment from List option in the Business Control Center.

If the user does not select the option, the workflow checks the project in and marks it as complete.

If the user selects the option, the workflow does the following:

1. Generates a new segment asset (`/atg/registry/RepositoryGroups/importGroups/<listname>.properties`).
2. Checks the project in and adds the list members to the profile repository (`/atg/userprofiling/ProfileAdapterRepository`) on the ATG Outreach Production/Staging instance configured to handle import operations.
3. Deploys the segment asset to all target sites.
4. Marks the project as complete.

Deleting Profiles Imported Through Lists

Import-based information can be removed from the profile repository only through the list import expiration feature. (For more information, see *Importing a New Mailing List* in the *ATG Outreach Guide for Business Users*.)

If you set an expiration date when the list was created, the profile information is removed when the date is reached. If you did not set an expiration date, you can remove the list information by expiring the list manually through the ATG Dynamo Server Admin on the ATG Outreach Production/Staging Server. In the Component Browser, navigate to `/atg/campaign/list/imports/ImportService` and click List Import Infos. Click Expire for the list you want to remove.

Campaign Template Process Workflow

When a user selects Operations > Outreach > Create a Campaign Template in the Business Control Center, the `/Campaigns/campaignTemplateWorkflow` process workflow is invoked.

This workflow acts as the parent process for campaign template projects. It calls the `/Campaigns/project/TemplateCampaigns` workflow. It also contains the necessary elements that allow a template to be modified after it has been deployed.

Campaign Template Project Workflow

`/Campaigns/project/TemplateCampaigns` is the project-level workflow that is used to create and deploy campaign templates. (Campaign templates are deployed to the ATG Outreach Production/Staging server so that their assets are available to campaigns that you create from them. However, the templates do not run as campaigns after deployment.)

Like the campaign workflow, this workflow has two versions, one that is used in environments that include both staging and production servers and one that is used for product-only installations. The version that you use is determined by the commands you use to start the ATG Outreach server. See [Starting ATG Outreach \(page 21\)](#) for more information.

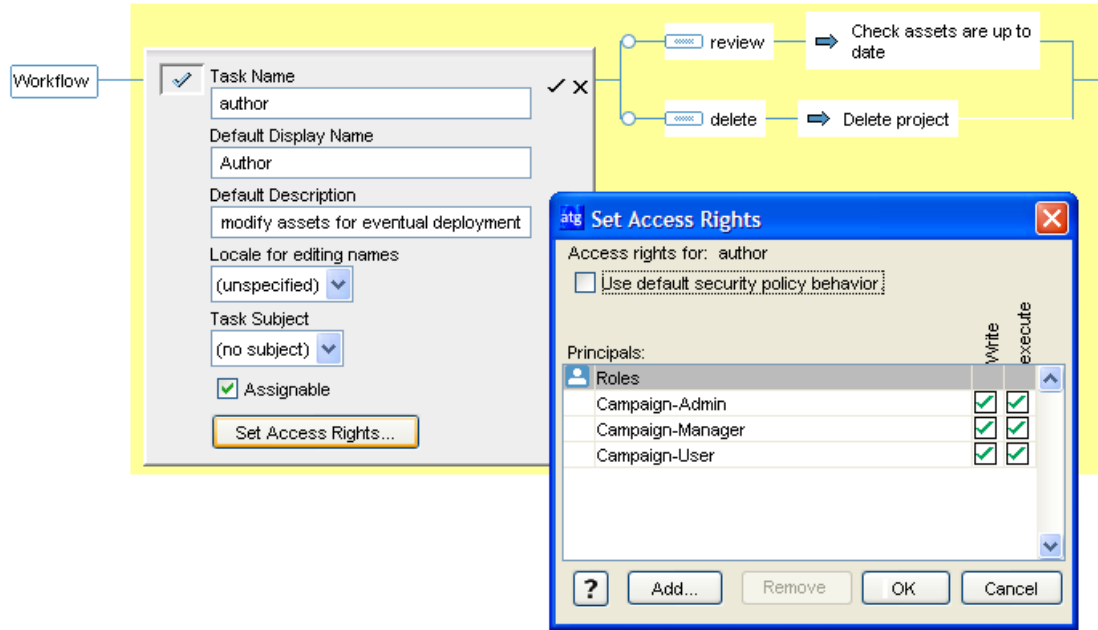
The campaign templates workflow contains the same stages as the default workflow used by ATG Content Administration; the difference is that the ATG Outreach workflow has a parent process that allows you to modify the campaign template after it has been completed. For detailed information, refer to *Installed Workflows* in the *ATG Content Administration Programming Guide*.

Default Workflow Permissions

This section lists the default permissions for tasks that require user action in the ATG Outreach workflows:

- [/Campaigns/campaignWorkflow \(page 67\)](#)
- [/Campaigns/project/Campaigns \(page 67\)](#)
- [/Campaigns/project/TemplateCampaigns \(page 68\)](#)
- [/ListImport/project/listImport \(page 69\)](#)

To see the current permissions for a workflow task, double-click on the task name in the ACC workflow editor and click the Set Access Rights button.



Configuration details for the Author task in the Campaigns project workflow

/Campaigns/campaignWorkflow

The table below shows the default permissions for the parent workflow that allows campaigns to be modified after they have been deployed.

Task	ATG Outreach User Roles	Permissions
Modify Deployed	Campaign-Admin Campaign-User Campaign-Manager EPub-Admin EPub-Super-Admin EPub-User	write, execute
Modify Running	Campaign-Admin Campaign-User Campaign-Manager EPub-Admin EPub-Super-Admin	write, execute
Delete	Campaign-Admin Campaign-Manager EPub-Admin EPub-Super-Admin	write, execute

/Campaigns/project/Campaigns

The table below shows the default permissions for the workflow that is used to create and deploy campaigns.

Task	ATG Outreach User Roles	Permissions
Author	Campaign-User Campaign-Manager Campaign-Admin	write, execute
Content Review	Campaign-Manager Campaign-Admin	write, execute
Staging Approval	Campaign-Admin	write, execute
Wait for Deployment to Complete (staging)	Campaign-Admin	write, execute
Production Approval	Campaign-Admin	write, execute
Wait for Deployment to Complete (production)	Campaign-Admin	write, execute

/Campaigns/project/TemplateCampaigns

The table below shows the default permissions for the workflow that is used to create and deploy campaign templates.

Task	ATG Outreach User Roles	Permissions
Author	Campaign-User Campaign-Manager Campaign-Admin	write, execute
Content Review	Campaign-Manager Campaign-Admin	write, execute
Staging Approval	Campaign-Admin Campaign-Manager	write, execute
Wait for Deployment to Complete (staging)	Campaign-Admin Campaign-Manager	write, execute
Production Approval	Campaign-Admin Campaign-Manager	write, execute
Wait for Revert Deployment to Complete	Campaign-Admin Campaign-Manager	write, execute
Wait for Deployment to Complete (production)	Campaign-Admin Campaign-Manager	write, execute

/ListImport/project/listImport

The table below shows the default permissions for the workflow that is used to manage the e-mail list import function.

Task	ATG Outreach User Roles	Permissions
ImportList	Campaign-Admin Campaign-User Campaign-Manager EPub-Manager EPub-Admin EPub-Super-Admin EPub-User	write, execute
Create Import Segment	Campaign-Admin Campaign-User Campaign-Manager EPub-Manager EPub-Admin EPub-Super-Admin EPub-User	write, execute

Appendix A. OptOutFormHandler

Use the `/atg/campaign/servlet/OptOutFormHandler` to give users a global opt-out option for e-mail communications. This form handler sets a profile's `receiveEmail` property to `true` (yes) or `false` (no), and sends an opt-out message that is used for reporting.

For detailed information on using form handlers in JSP pages, refer to the *ATG Page Developer's Guide*.

OptOutFormHandler Test Page

```
<%@ taglib uri="http://www.atg.com/taglibs/daf/dspjspTaglib1_0" prefix="dsp" %>
<%@ taglib uri="http://www.atg.com/taglibs/daf/dspjspELTaglib1_0"
    prefix="dspel" %>
<%@ page import="atg.servlet.*"%>

<dsp:page>
<dsp:importbean bean="/atg/campaign/servlet/OptOutFormHandler"/>
<dsp:importbean bean="/atg/userprofiling/Profile"/>

<html>
<head>
    <title>OptOutFormHandler test page</title>
</head>

<body>

<h3>OptOutFormHandler test page</h3>

<dsp:form action="OptOutFormHandler_test_page.jsp" method="post">

<p>Current profile: <dsp:valueof bean="Profile.firstName"/>
<dsp:valueof bean="Profile.lastName"/> (<code>receiveEmail</code> property
currently set to <strong><dsp:valueof
    bean="OptOutFormHandler.receiveEmail"/></strong> )

<p><dsp:input bean="OptOutFormHandler.receiveEmail"
    type="checkbox"/> Yes, send me e-mail!

<br>
<br>

<dsp:input bean="OptOutFormHandler.submit" type="Submit" value="Submit"/>

</dsp:form>

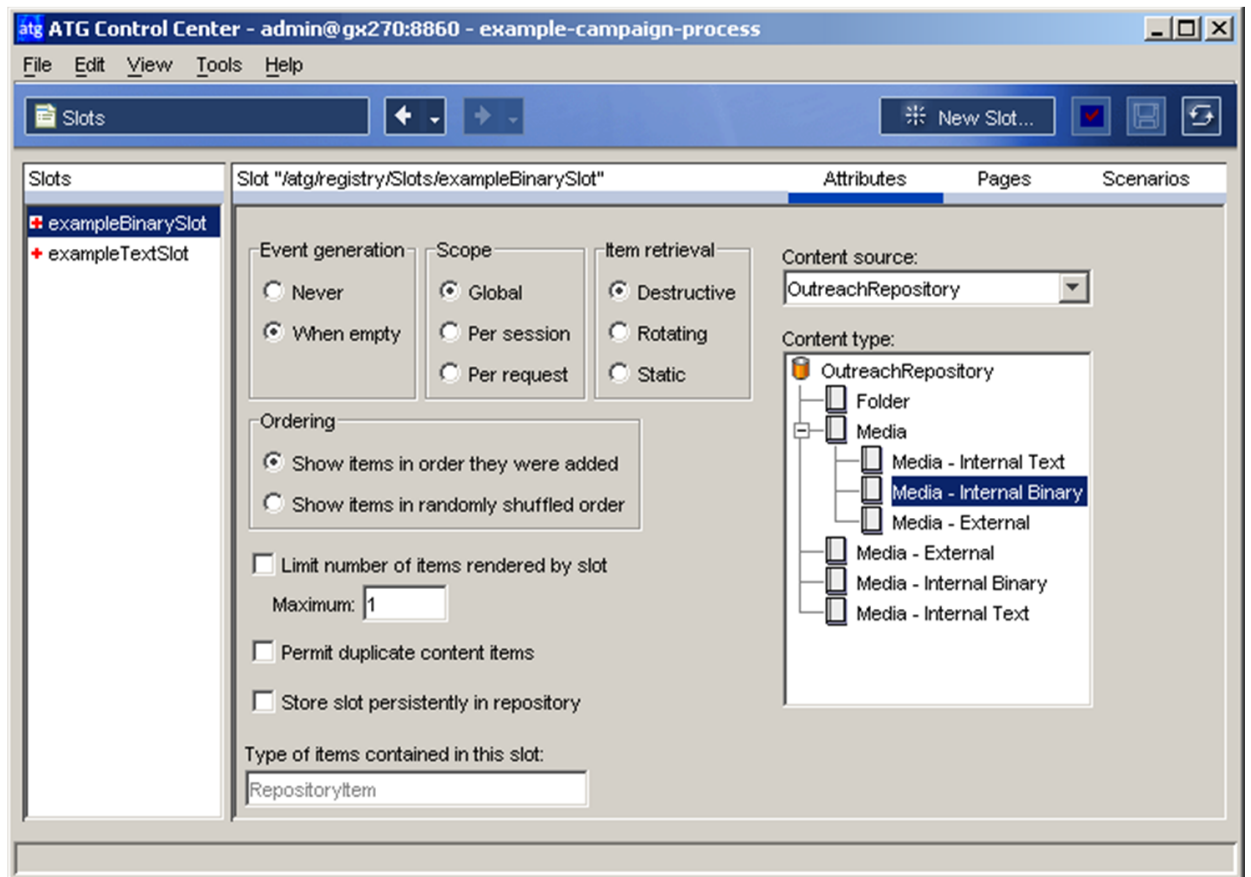
</body>
</html>
```

</dsp:page>

Appendix B. B: Slot Configuration Requirements

Use the Scenarios > Slots screen in the ATG Control Center to create and configure slot components for the Publish Web Content campaign action. The following configuration settings are required:

- Content source: ATG OutreachRepository
- Content type: Media – Internal Binary (for binary content) or Media – Internal Text (for text content)



ACC slot editor (Scenarios > Slots screen)

Note that using a session-scoped slot may cause errors similar to the following to appear in the console. The campaign is not affected.

```
Error Invalid attempt to resolve component /atg/registry/Slots/<slotname> in scope
global. It is defined in scope session
Error /atg/dynamo/servlet/pipeline/RequestScopeManager/
RequestScope-218/atg/userprofiling/ProfileFormHandler
No slot component found at path /atg/registry/Slots/<slotname>
```

The following JSP snippets show you how to render binary and text slot content.

Binary Content JSP Example

```
<dsp:droplet name="/atg/targeting/TargetingForEach">
  <dsp:param bean="/atg/registry/Slots/exampleBinarySlot" name="targeter"/>
  <dsp:param name="howMany" value="1"/>
<dsp:oparam name="empty">
  Empty Slot rendered
</dsp:oparam>
<dsp:oparam name="output">
  ">
</dsp:oparam>
</dsp:droplet>
```

Text Content JSP Example

```
<dsp:droplet name="/atg/targeting/TargetingForEach">
<dsp:param bean="/atg/registry/Slots/exampleTextSlot" name="targeter"/>
<dsp:param name="howMany" value="1"/>
<dsp:oparam name="empty">
  Empty Slot rendered
</dsp:oparam>
<dsp:oparam name="output">
  <dsp:valueof valueishtml="true" param="element.data"/>
</dsp:oparam>
</dsp:droplet>
```

Note the use of `valueishtml="true"` above. The text content is created using an HTML editor, and if you do not include this attribute, HTML tags appear on the page when the slot is rendered.

To learn more about slots, see the *ATG Personalization Programming Guide* and the *ATG Personalization Guide for Business Users*. To learn more about creating personalization assets for use in campaigns, see the *ATG Content Administration Guide for Business Users*.

Index

A

- age property, adding to segment editor, 28
- ATG Outreach data loading module, 3
 - installing, 15
- ATG Outreach Data Warehouse module, 15
- ATG Outreach Production/Staging module, 3
 - configuring, 33
 - in a production cluster, 12
 - installing, 14
- ATG Outreach server, 3
 - configuring, 18, 27
 - installing, 13
- ATG Web Server Extensions, 15

B

- Business Control Center, 6
 - logging in, 24
 - user roles, 47

C

- campaign asset types, 29
- campaign template workflows, 66
- campaign workflows, 59
- campaigns, testing, 39
- CIM
 - using, to configure ATG Outreach, 13, 16
- cluster, ATG Outreach production, 11
- Commerce extensions, 4
- Configuration and Installation Manager (see CIM)
- contact fatigue, 34
- ContentDistributorPool, 28, 34

D

- data loading
 - module, 3
 - scheduling, 44
- database configuration
 - creating the ATG Outreach schemas, 17, 19
 - data sources, 18, 19
 - importing the initial ATG Outreach data, 18

- DaysBeforeAnnualEvent derived property, 28
- deployment
 - configuring, 35
 - data sources, 37
 - destination repositories, 35
 - to a production cluster, 12
- deployment topology, defining, 37
- derived properties, 28
- distributed e-mail services, 12
- DistributorServer, 15

E

- e-mail addresses, importing, 55
- e-mail preview feature, configuring, 32
- e-mail rendering servers in a production cluster, 12
- EmailListRepositoryGroupMonitor, 54
- ExternalProfileRepository, 5
 - extended by ATG Outreach, 5
- ExternalUsers modules, 5

F

- Frequency of contact policy, 34

I

- Import Server, 33
- importing mailing lists, 55
- ImportRMIClient, 27
- ImportService component, 57
- Insert Page Fragment feature, 31
- InternalProfileRepository, 4
- Internet Explorer, configuration tips, 24

J

- JSP fragments used in e-mails, 31
- JSPFileVFSService, 31

L

- list import workflows, 64
- lock managers, 34

M

- mailing lists, importing, 27, 33
- multiple ATG Outreach production servers, configuring, 11
- multisite campaigns, 41

O

- opt-in and opt-out segments
 - creating, 49
 - monitoring, 54
- OptInOutSegmentFormHandler, 53
- OptOutFormHandler, 71

Override frequency of contact policy, 34

P

ParameterStringCodec, 34

Preview config layer

- effect on profile repository model, 4

- enabling, 22, 23

preview profile repository, 5, 32

previewing e-mail content, 32

process editor server in a production cluster, 12

production cluster, configuring, 11

Profile Browser, 28

profile repositories used by ATG Outreach, 4

profile repository extensions, 5

ProfileFormHandler, 50, 51

Publish Web Content action

- configuring, 15, 28, 34

- slot requirements, 73

R

reporting

- data loading, 44

- roles and security, 44

- segments monitored for, 44

- setting up, 43

Reports tab, 45

request-handling servers in a production cluster, 12

runAssembler script, 21

S

SelectiveDeleteVFSService, 35

slot components, configuring for Publish Web Content

action, 73

Staging config layer

- enabling, 22, 23

staging server

- configuring, 39

- editing or stopping campaigns, 40

- reporting, 40

starting ATG Outreach, 21

T

TemplateEmailSender, 34

testing campaigns, 39

TimeInterval derived property, 28

U

user accounts, creating, 47

W

workflows, 59

- default permissions, 66

for campaign templates, 66

for campaigns, 59

for list imports, 64

Y

YearMonthDay derived property, 28